

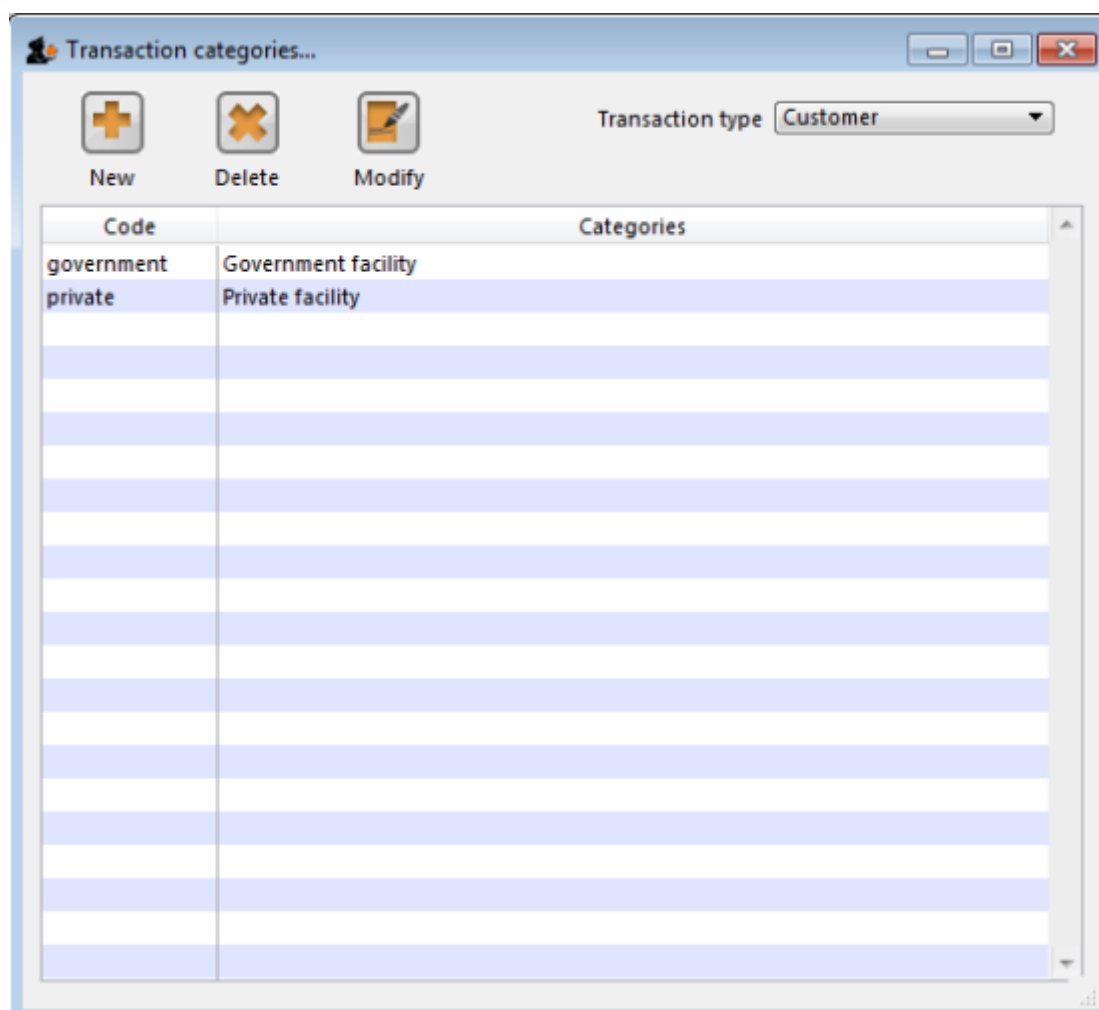
How to report by invoice category

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Within mSupply if you have categorised invoices (or transactions) in a particular manner then you will be able to run reports based on this category. In dispensary mode Prescriptions can also be categorised. For example you may be required to tag your customer invoices as “Government” or “Private” facilities.

Follow these steps to generate a report by invoice category :-

- Make sure there is at least one transaction category available in your data file. If not, then follow the instructions at [26.06. Transaction categories](#) to create a transaction category.



For this example the image above shows the addition of two categories for customer invoices.

- On your Invoices window, all of your categories will be displayed under the “Category” drop-down list.

Customer invoice

Name: Arubari Mini Health post Confirm date: 00/00/00 Colour: Black

Their ref: aru Invoice: 510

Comment: Entry date: 09/04/2012

Category: Government facility
None
Government facility
Private facility Goods receive ID: 0

New line Delete line(s) Status: nw

Backorders History Confirm Entered by: sussol

Store: General

L..	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
1	C 21	Abacavir sulfate (ABC) 300mg, Tabs	10	60	1082375	01/10/201	14.49	144.90
2	H13	Dapsone 120mg, Oral 120mg tabs,	1	100	144	11/01/201	9.32	9.32
3	Expire Roo	Giemsa's Solution, 500ml/bottle	10	1	V0810026	01/09/201	4.00	40.00

Other charges Item:

Amount: 0.00

Subtotal: 194.22

0 % tax: 0.00

Total: 194.22

Mold Finalize Export batch: 0

OK & Next Delete OK

- Choose the category from the list and click on the OK button. For reporting purposes, the invoice will need to be confirmed.
- For reporting, from mSupply menu or Navigator , View Report → Transactions.

Transaction report...

Type of report

Report

Each invoice grouped by name

Each invoice grouped by date

Each invoice line by item

Each invoice showing profit

Each invoice line grouped by item department then item

Each invoice line grouped by name

Totals for each item category

Totals for each item

Totals for each item-Net Inventory Adjustment

Totals for each name

Totals for each item broken down by name

Totals for each name broken down by item

Totals for each item department

Totals for each item grouped by day

Totals for each item grouped by month

Date range

Confirmed Date

Shipping Date

From 09/04/2012 To 09/04/2012 Today

Donated by equals

Which mode?

Both modes

Store mode

Dispensary mode

Exclude transfers from calculations

Exclude Ad hoc and non stock items

Exclude hidden items

Transaction type

Sales to customers

Sales to and credits from customers

Purchases from suppliers

Purchases from and credits to suppliers

Inventory adjustment - Add stock

Inventory adjustment - Reduce stock

Inventory adjustment - Net movement

Transaction filter

Code contains govern

Name filter

Name code equals

and Category Don't care

Prescriber filter

Code equals

Item filter...

Item code equals

and category is Don't Care

and department is Don't care

Open report in Excel

Cancel

OK

- On the right hand side of that window, you will see the section “Transaction filter”. Here we have chosen to search for “Code” contains “govern”, which is equivalent to searching for “Code” equals “Government”. Click on the OK button and you will now have the opportunity to view items issued to government facilities.

Print Preview

Sales, Confirm date : 09/04/2012 to 09/04/2012, Store : General Mode: Both Transaction category : Code contains @govern@

Item	TotFrom	Code	Date	Invoice	#Packs	Pack Size	Total Quant	Cost Price	Sell Price	Price Extension
Axoclin sulfate / ABCI 300mg, Table	Axoclin 1010 Health post	axu	09-04-12	810	10.00	80.00	800	14.49	14.49	114.90
Total										114.90
Exacrine 100mg, Oral 120mg dose	Axoclin 1010 Health post	axu	09-04-12	810	1.00	100.00	100	9.32	9.32	9.32
Total										9.32
Gemars solution 800mcg/ml	Axoclin 1010 Health post	axu	09-04-12	810	10.00	1.00	10	4.00	4.00	40.00
Total										40.00
Grand Total										164.22

Previous: [How to correct wrong packsizes](#)

You have reached the end of the mSupply User Guide

From:
<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:
https://docs.msupply.org.nz/faq:how_to_report_by_invoice_category?rev=1447817669

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