## How to report by invoice category

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.

Transaction	categories			
-	*		Transaction type Customer	•
New	Delete	Modify		
Code			Categories	~
government	Governm	ent facility		
private	Private fa	cility		
				_

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" dropdown list.

The	ir re	r [	fini Health post	F	irm date Category	Governme None Private fac	ent facility		l Entr Goods rec	Colour: 510 nvoice: 510 ny date: 09/04/20 eive ID: 0 Status: nw	
	ew li		C. ete line(s) by Item   Summary by Batch   Transpo	ort details	Backo	The second second	順 fistory	Confirm	Ente	red by : sussol Store : General	
10.1	Lo	Location	Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	
-			Abacavir sulfate (ABC) 300mg, Tabs		10	60	1082375	01/10/201	14.49		44.90
	2	H13	Dapsone 120mg, Oral 120mg tabs.		1	100	144	11/01/201	9.32		9.32
•	6	) 🖹 着	Other charges It	em:					Su	mount: [	0.0 194.3 0.0 194.3

- 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  $\rightarrow$  Transactions.

							. 4		
Type of report		Transaction type							
Report	Sales to customers								
Each invoice grouped by name	Sales to and credits from customers								
Each invoice grouped by date	<ul> <li>Purchases from suppliers</li> <li>Purchases from and credits to suppliers</li> <li>Inventory adustment - Add stock</li> </ul>								
Each Invoice line by item									
Each invoice showing profit									
Each invoice line grouped by item department then item									
Each invoice line grouped by name	13	Inventory ad	justment	- Reduce stock					
Totals for each item category		Inventory ad	justment	- Net movement	£				
Totals for each item Totals for each item-Net Inventory Adjustment	Transaction filter								
Totals for each name		Code		contains	•	govern			
Totals for each item broken down by name		Coue		concorris		Idovenul	-		
Totals for each name broken down by item	Name filter								
Totals for each item department		Name code	-	equals		-			
Totals for each item grouped by day		Transie an an		Contractor.		-			
Totals for each item grouped by month		and	*	Category	Do	n't care	•		
Date range		Prescriber filter	_						
Confirmed Date Shipping Date		Code	•	equals	•				
rom 09/04/2012 To 09/04/2012 Today	Rem filter								
		Item code	•	equals	•				
Donated by equals		and	•	category is	Dor	t Care	•		
Which mode?	and	•	department i	(Don't care 🔹					
😨 Both modes 👘 Store mode 👘 Dispensary mo	de								
Exclude transfers from calculations									
Exclude Ad hoc and non stock items									
Exclude hidden items		Open report in			ncel	-	ж		

• 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.

anes, commune	: 09/04/2012 to 09/04/2012,	Store : G	eneral Mod	ie Both Tr	ransactio	n catego	ry : Cod	le contains	@govern	8.
	TolFram	Ciste	Date	Involue	Fasta	Pack Si28	Total Quan	Cost Price	Sell Price	Prov
Alectery suffre (ABC) 200mg Tells	<ul> <li>Asyber Simi Health pipel</li> </ul>		09:04/12	818	10,00	80.00	600	14.49	14.49	144.90
Dapatrie 100 mg. Dia in 20mg taba	Av ben fintr Heath poet		21.40.40	810	1.20	100.00	100	8.10	Tutal 9.32	14430
die mass soutor addreaste	Avutari 10111 Heath cogi		09-04-12	872	10.00	1.00	-12	800	Total # 00	9.32
	Organ Tat		100012		10.05			1.00	Table	45.00
										- 1
										- 1

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