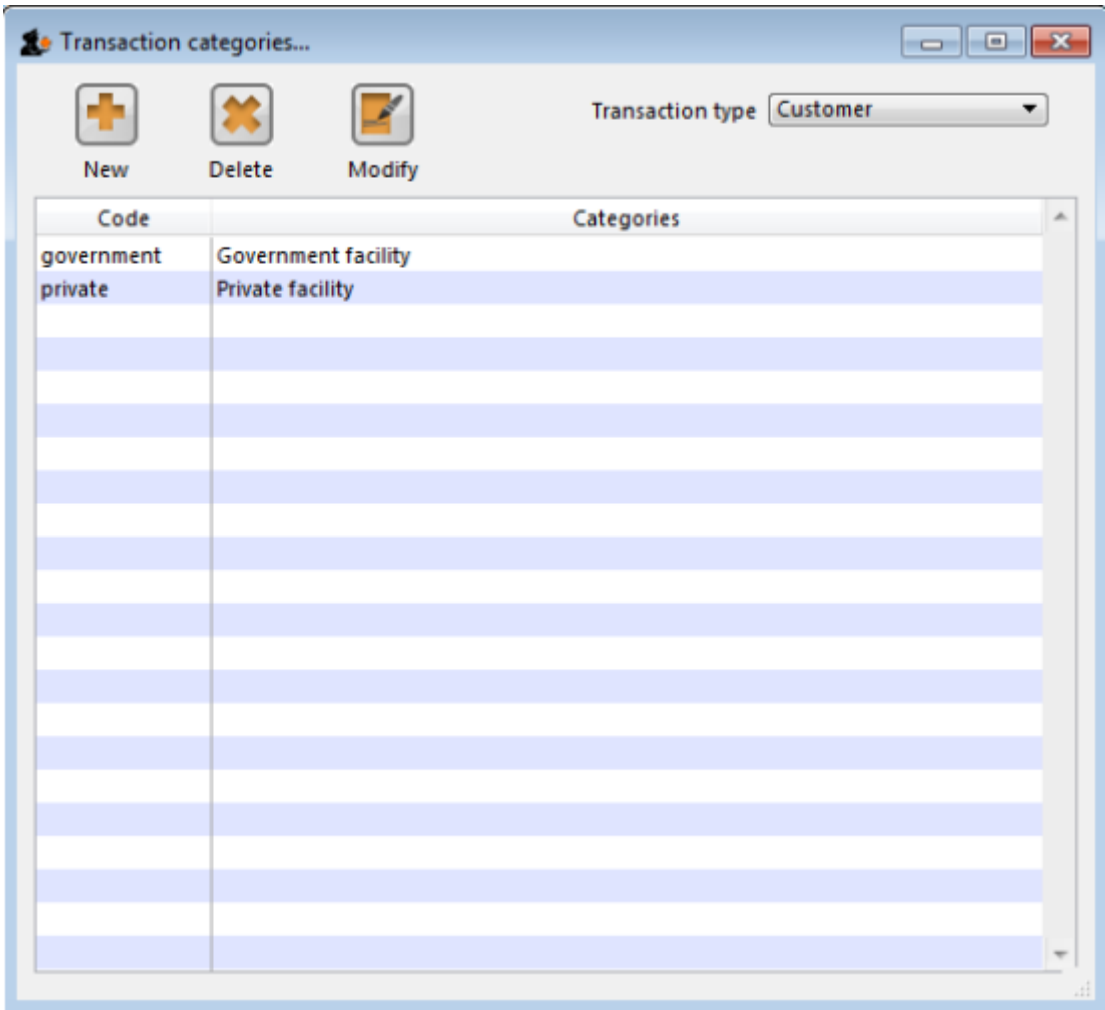


24.08. How to report by invoice category

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.



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.

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- 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	To/From	Code	Date	Invoice	#Packs	Pack Size	Total Quant	Cost Price	Sell Price	Price Extension
Axoclin sulfate / ABCI 300mg, Tabs	Axoclin 1010 Health post	axu	09-04-12	810	10.00	80.00	800	14.49	14.49	114.90
Total										114.90
Salasine 120mg, Oral/120mg tabs	Axoclin 1010 Health post	axu	09-04-12	810	1.00	100.00	100	8.35	8.35	8.35
Total										8.35
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										164.25

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

Previous: [How To Correct Wrong Packsizes](#) Next: [FAQ: Imprest Work Flow](#)

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Last update: **2019/10/16 13:47**

