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.

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

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 Com		100	aru		Category	Governme None Private fac	ent facility	-	Entry Goods rece	woice: 510 y date: 09/04/20 ive ID: 0 Status: nw	112
	ew I		ter line(s) sy Item Summary by Batch Transpo	rt detail	Backo	The second second	底 fistory	Confirm		ed by : sussol Store : General	
10.1	La	Location	Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	
			Abacavir sulfate (ABC) 300mg, Tabs		10			01/10/201	14.49		144.90
	2	H13	Dapsone 120mg, Oral 120mg tabs.		1	100	144	11/01/201	9.32		9.32
			Giemsa's Solution, 500ml/bottle		10			01/09/201	4.00		40.00
.	6		Other charges It	rm: [Sui	sount: btotal: % tax: Total:	0) 194. 0) 194.

- 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		O Purchases fr	om suppl	liers					
Each Invoice line by item		O Purchases from and credits to suppliers							
Each invoice showing profit									
Each invoice line grouped by item department then item	Inventory adustment - Add stock								
Each invoice line grouped by name	13	Inventory adjustment - Reduce stock							
Totals for each item category		Inventory adjustment - 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	Dor	n'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.

				e bon t		in carefy	. cu	le contains	Banen	e,
	Tolfram	Cothe	Date	Involta	Fasta	Pack Size	Total	Cost Price	Sell Price	Pres
Alleter's suffre (ABO) 200mg, Te	ta Aruber Simi Health pital		09/04/12	818	10.00	80.00	600	14.49	14.48	144.90
Departmentsbing, Crising Strong Series	Av ben trith Heath post		21.40.40	810	1.20	100.00	100	8.12	T stat	144.90
Die mars soutor addressete	Avual tim Heath poli		09-04-12	872	10.00	1.00	- 12	800	Total + c0	9.32
	Ordent Tat								Tala.	12420

Last update: 2019/10/28 faq:how_to_report_by_invoice_category https://docs.msupply.org.nz/faq:how_to_report_by_invoice_category?rev=1572297661 21:21

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