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25.08. 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		
				*

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	ir rel ment		aru	0	stegory	Governme None Private fac	nt facility nt facility ility		Tr Entry Goods rece	woice: 510 / date: 09/04/20 iveID: 0 Status: nw	12
N	ew l	ine Dele Summary I	te line(s) sy Item Summary by Batch Transpor	t details	Backo] rders I	圓 listory	Confirm	Enter	ed by : sussol Store : General	
100	La	Location	Rem Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	1
	1	C 21	Abacavir sulfate (ABC) 300mg, Tabs		10	60	1082375	01/10/201	14.49	1	44.90
	2	H13	Dapsone 120mg, Oral 120mg tabs.		1	100	144	11/01/201	9.32		9.32
•	6) 🖹 着	Other charges Ite	m: [Am Sut O	oount: ototal: % 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.

lype of report		Transaction type					
Report		 Sales to cust 	omers				
Each invoice grouped by name		Sales to and	credits fr	rom customers			
Each invoice grouped by date		O Purchases fr	om suppl	liers			
Each Invoice line by item		Purchases fr	om and c	redits to supplie	es:		
Each invoice showing profit		10 10 10 10 10 10					
Each invoice line grouped by item department then item		tinventory ad	ustment	- ADD STOCK			
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	Transaction filte	r.					
Totals for each item-vet inventory Adjustment		Code	-	Constation -	-	[automation]	_
Totals for each item broken down by name		Lode		contains		Governa	-
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	•	0	- 2
rom 09/04/2012 To 09/04/2012 Today	•	Item filter					
		Item code	•	equals	•		
Donated by equals		and	•	category is	Don	't Care	•
Which mode?		and	*	department i	Dor	i't care	•
💿 Both modes 👘 Store mode 👘 Dispensary mod	de						
Exclude transfers from calculations							
Exclude Ad hoc and non stock items							
Exclude hidden items				C		_	

• 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.

Sales, Confirm date : I	09/04/2012 15 09/04/2012,	Store : Ge	eneral Mod	e Both Tr	ansactio	n catego	ry : Co	Se contains	Glovern	e.
	TolTran	Cistle	Date	Invoice	#Patha	Pack Size	Tolar Quan	Cost Price	Sell Price	Prov Extension
Alecter's suffre (ABC) 200mg, Telle	Any ber Simi Health pitel		09-04-12	\$10	10.00	80.00	600	14.49	14.48	144.90
Depatrie toping, criai 120ng taba	Av ben trith Heath post		CHICA 12	810	1.20	100 00	100	8.32	F 4141	9.12
And an an an address of the second	And an an an an an art of the second	11.00					-		Total	9.32
General source, aconcade	Availabilite the Market page		CHOR12		12.05	1.05		100	Tabe.	48.00
	O-raid Tat	94 1								154.20

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