

~~SLIDESHOW~~

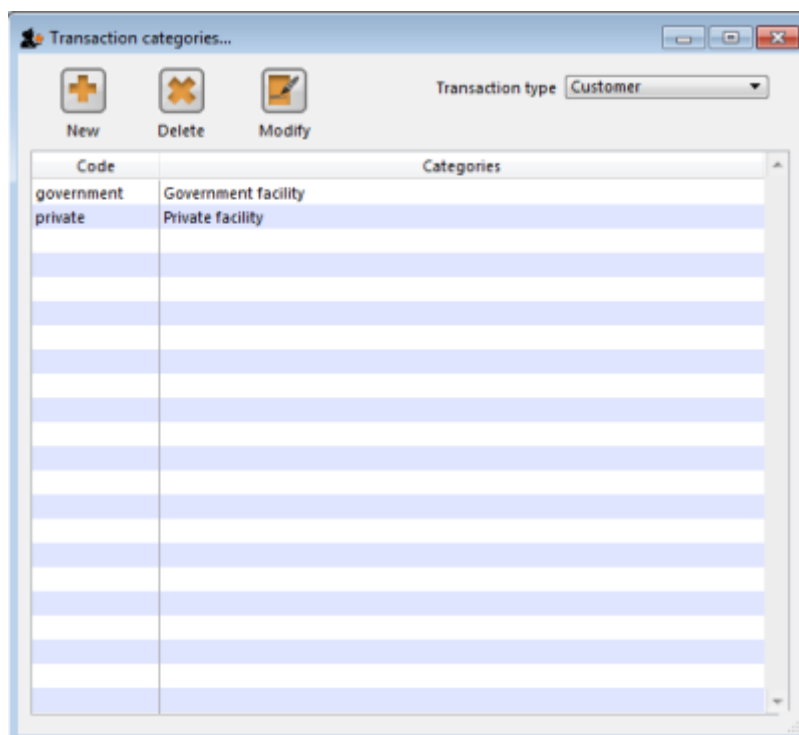
## How to report by invoice category

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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 [http://docs.msupply.org.nz/other\\_stuff:transaction\\_categories](http://docs.msupply.org.nz/other_stuff: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

Invoice: 510    Entry date: 09/04/2012    Goods receive ID: 0    Status: inv    Entered by: sussol    Store: General

Category: Government facility

L	Location	Item Name	Qty	Pack Size	Batch	Exp date	Sell Price	Price extn
1	C21	Abacavir sulfate (ABC) 300mg Tabs	30	60	1062375	01/10/2011	14.49	144.90
2	H53	Dapsone 120mg, Oval 120mg tabs	1	100	144	11/01/2011	9.32	9.32
3	Expire Roo	Gimm's Solution, 500ml/bottle	10	1	V0810026	01/09/2011	4.00	40.00

Other charges:    Amount: 0.00

Subtotal: 194.22  
0 % tax: 0.00  
Total: 194.22

Buttons: Hold, 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

Transaction type: Sales to customers

Transaction filter: Code contains govern

Name filter: Name code equals

Prescriber filter: Code equals

Item filter: Item code equals

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: Exclude transfers from calculations    Exclude Ad hoc and non stock items    Exclude hidden items

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.

Report Preview

Print | Export | Refresh | Close

Sales, Confirmed date : 09/04/2012 to 09/04/2012, Store : General Medic (Sth Transaction category : Code contains @government).

Item	Supplier	Code	Date	Invoice	IP Price	Price	Total	Cost Price	Net Price	Price
Salmon Trout 100g 100g 100g	General Medic (Sth Transaction category : Code contains @government)	100	09/04/12	100	10.00	10.00	10.00	10.00	10.00	10.00
Salmon Trout 100g 100g 100g	General Medic (Sth Transaction category : Code contains @government)	100	09/04/12	100	10.00	10.00	10.00	10.00	10.00	10.00
Salmon Trout 100g 100g 100g	General Medic (Sth Transaction category : Code contains @government)	100	09/04/12	100	10.00	10.00	10.00	10.00	10.00	10.00
Salmon Trout 100g 100g 100g	General Medic (Sth Transaction category : Code contains @government)	100	09/04/12	100	10.00	10.00	10.00	10.00	10.00	10.00
Grand Total										40.00

<note>You have reached the end of the mSupply® user guide.</note>

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

Permanent link:  
[https://docs.msupply.org.nz/faq:how\\_to\\_report\\_by\\_invoice\\_category?rev=1342030771](https://docs.msupply.org.nz/faq:how_to_report_by_invoice_category?rev=1342030771)

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