## 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.

Thei Comr		10	aru	[	Category	Governme None Private fac	ent facility		Ent Goods rec	Invoice : 510 ny date : 09/04/20 eive ID : 0 Status : mw	11.2
- 18	ew I		C. ete line(s) by Item   Summary by Batch   Transpor	rt details	Backo	Contract 100	listory	Confirm	Ente	ered by : sussol Store : General	
100	La	Location	Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	1
		C 21	Abacavir sulfate (ABC) 300mg, Tabs		10	60		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								
•	6		Other charges Its	em: [					Su	mount: ubtotal: ) % tax: Total:	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.

Transaction report							1	
Type of report		Transaction type						
Report		Sales to cust	tomers					
Each invoice grouped by name		Sales to and	credits fr	rom customers				
Each invoice grouped by date		O Purchases fr	om suppl	iers				
Each Invoice line by item		(P) Purchases fr	om and c	redits to supplie	462			
Each invoice showing profit								
Each invoice line grouped by item department then item		C Inventory ac	iustment	- Add stock				
Each invoice line grouped by name	8	Inventory ac	ljustment	- Reduce stock				
Totals for each item category		O Inventory ad	ijustment	- Net movement				
Totals for each item	10	Transaction filter						
Totals for each item-Net Inventory Adjustment Totals for each name				Free and the second	1		_	
Totals for each name Totals for each item broken down by name		Code	*	contains	٠	govern		
Totals for each name broken down by name	1	Name filter						
Totals for each item department		Name code	-	equals		1	_	
Totals for each item grouped by day				(sidnes)	1000	1		
Totals for each item grouped by month		and		Category	(De	n't care	-	
lease an ann an san		ano	-	caregory	00	or c care		
Date range		Prescriber filter						
Confirmed Date O Shipping Date		Code	•	equals	٠	[	- 23	
From 09/04/2012 To 09/04/2012 Today *	E.	Item filter						
		Item code	•	equals	•			
Donated by equals	13	and	•	category is	Dor	n't Care	•	
Which mode?		and		department i	Dor	n't care	•	
which mode:				department (	10000		_	
Both modes O Store mode O Dispensary mode								
Exclude transfers from calculations								
Exclude Ad hoc and non stock items								
Exclude hidden items		Open report in	-	0	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.

Sales, Confirm date : 0	29/04/2012 to 09/04/2012,	Store : Ge	eneral Mod	e Both Tr	ansactio	n catego	ry : Cot	le contains	@govern	e.
	Tolfram	Cidle	Date	Involue	Fasta	Pack Size	Total	Cost Price	Sell Price	Pros
Aletern suffre ABO 2001g Telle	Any ben time relative post	<b>#</b> V	09/04/12	818	10.00	80.00	800	14,49	14.48	144.90
Dapatine 120 mg. Crail 120 mg taba	Auber fritt Heath poer		09.0412	810	1.20	100.00	100	8.12	Tutal 9.32	144.90
Die mark soutor aborcoote	Avudari Minti Health popi		09-04-12	870	10.00	1.00	12	800	Total + c0	9.32
	O-set Tata								Talai.	45.00

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Previous: How to correct wrong packsizes

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