## 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	ir re	r [	fini Health post 4	-		Governme None Private fac	nt facility	•	In Entry Goods rece	olour: 510 / date: 09/04/20 /veID: 0 /tatus: mw	
0.0	ew li		(). ete line(s) by Item   Summary by Batch   Transpo	rt details	Backo	Contraction of the	(E) Fistory	Confirm		ed by : sussol Store : General	
100	L.	Location	Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	1
	1	C 21	Abacavir sulfate (ABC) 300mg, Tabs	1	10		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
			Giemsa's Solution, 500ml/bottle		10			01/09/201	4.00		40.00
<b>.</b>	1		Other charges Its	em:					Sut 0	iount: Itotal: % 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.

Transaction report							1		
Type of report		Transaction type							
Report		Sales to customers							
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		linventory adustment - Add stock							
Each invoice line grouped by name	8	Inventory adjustment - Reduce stock.							
Totals for each item category		Inventory adjustment - Net movement							
Totals for each item	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.	Rem 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.

				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 Simine almotal		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	8.10	Tutal 9.32	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

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