28.08. 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 .om		100	aru	Cate	gory	Governme None Private fac	ent facility		Entr Goods rec	nvoice : 510 ny date : 09/04/21 eive ID : 0 Status : nw	012
- 13	ew li		ter line(s) sy Item Summary by Batch Transpo		Backo	Contract in the	listory	Confirm	Ente	red by : sussol Store : General	E.
	L.	Location	Rem Name	Q	uan	Pack Size	Batch	Exp date	Sell Price	Price exten	10
	1	C 21	Abacavir sulfate (ABC) 300mg, Tabs		10	60	1082375	01/10/201	14.49		144.90
	2	H13	Dapsone 120mg, Oral 120mg tabs.		1	100	144	11/01/201	9.32		9.32
.	6) 🖹 着	Other charges Its	em: [Su	mount: [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.

Transaction report							6		
Type of report		Transaction type	e						
Report		Sales to cus	tomers						
Each invoice grouped by name		💮 Sales to and	d credits fr	rom customers					
Each invoice grouped by date		O Purchases fr	rom suppl	liers					
Each Invoice line by item		() Purchases f	rom and r	redits to supplie	ue:				
Each invoice showing profit		-							
Each invoice line grouped by item department then item		 Inventory adustment - Add stock Inventory adjustment - Reduce stock Inventory adjustment - Net movement 							
Each invoice line grouped by name									
Totals for each item category									
Totals for each item	C	Transaction filte	ur .						
Totals for each item-Net Inventory Adjustment Totals for each name				Free Provide State	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		Name filter							
Totals for each item department		Name code	-	equals		-	_		
Totals for each item grouped by day			15	(contraste):		-			
Totals for each item grouped by month		and	-	Category	De	n't care	-		
lease an ar a car	61 8	and		caregory	00	HIL COTE			
Date range		Prescriber filter							
Confirmed Date O Shipping Date		Code	•	equals	•	ſ			
From 09/04/2012 To 09/04/2012 Today *		Item filter							
		ltem code	•	equals	•	1			
Donated by equals		and	•	category is	Dor	n't Care	•		
		and	*	department i	Do	n't care	•		
Which mode?				uepartment t	(and				
💿 Both modes 👘 Store mode 👘 Dispensary mode									
Exclude transfers from calculations									
Exclude Ad hoc and non stock items									
Contract we not and non stork items									
Z Exclude hidden items		11		1000		-			
	1	Open report in	n Excel	Ca	ncei		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 produces the same results as 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 : (29/04/2012 to 09/04/2012,	Store : Ge	eneral Mod	ie Both Tr	ransactio	n catego	ry : Cos	le contains	(Blankun	8.
	Tulfram	Cistle	Date	Invoice	Fasta	Pack Size	Total Guan	Cost Price	Sell Price	Prov
Allecter's suffice (ABC) 200+g. Telle	Any ber stream poel		09-04-12	\$10	10.00	00.00	600	14.49	14.48	144.90
Depatrie 100 mg, Drai 120 mg 1406	Av ben frith Heath post		. ce.ca.12	810	1.20	100 00	100	832	Total 9.32	14430
									Total	9.32
die mass soution aböncoptie	Avuder führt Heath post		09-06/12	8.12	12.00	1.00	. 12	8.00	e 20 Talat	40.00
	Grand Tat	iii								154.20

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Previous: 28.07. How to correct wrong pack sizes || Next: 28.09. Imprest work flow

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