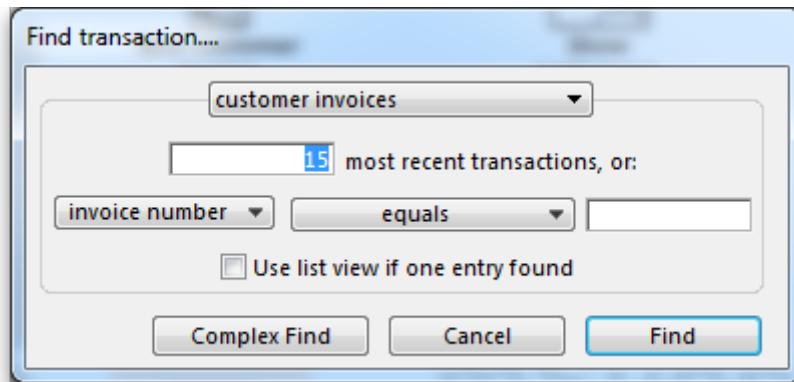


## 8.02. Viewing customer invoices

To view or edit any customer invoice, choose *Customer>>Show invoices*

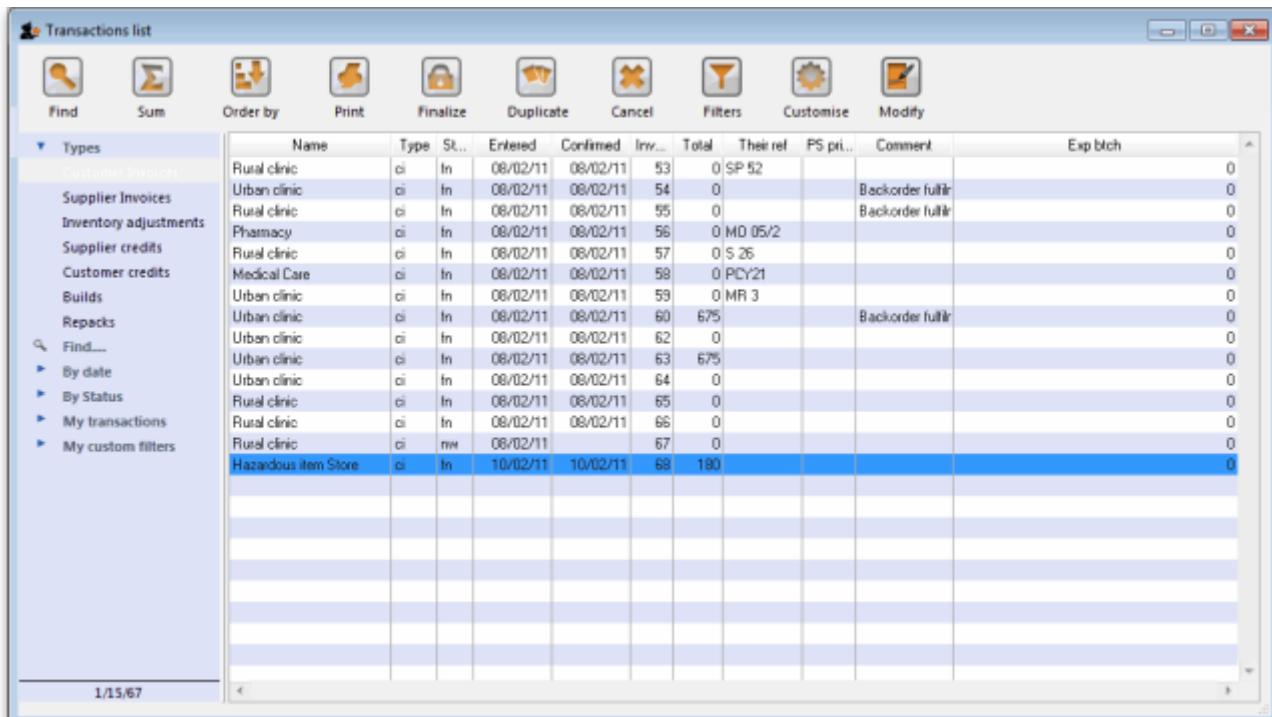
### Find transactions window

You will be presented with this window where you can enter a number.



If you enter:	Transaction(s) Displayed
1	You will be taken directly to the most recent invoice entered
25	A list of the 25 most recent invoices
123 in the lower box	Invoice number 123 will be displayed.
Click the Complex Find button	The query editor will be displayed, where you can enter a more detailed query.

The list invoices window uses the *Transactions list* form, which looks like this:

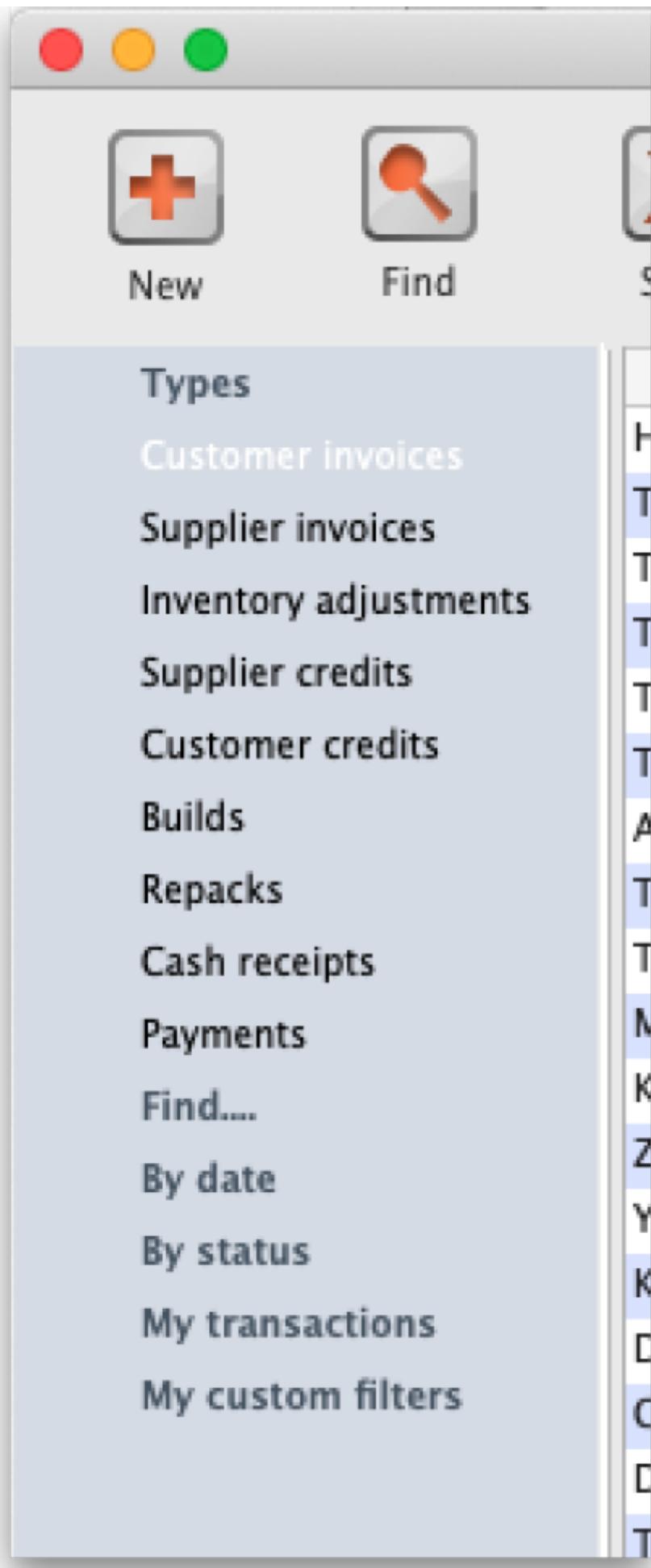


*Note. All of the columns may be adjusted in width to meet your requirements; for the screenshot above to fit on the page, most of the columns were reduced in width.*

Down the left side is a sidebar, with 5 headings:

1. Type
2. By date
3. By status
4. My transactions
5. My custom filters.

Clicking on the small triangle to the left of each heading will expand it and display the options available. In the graphic below, the **Types** heading has been expanded to display the available options



Once the type of transaction has been selected, it remains selected while you further define the required criterion from one of the four remaining headings, *By date*, *By status*, etc. Be aware that a single criterion only from this group of 4 headings may be selected.

At the bottom left of the window you'll notice there are 3 numbers separated by slashes- "1/15/67" in the example above. These numbers, in order, are the number of highlighted rows, the number of found rows, and the total number of transactions in the database.

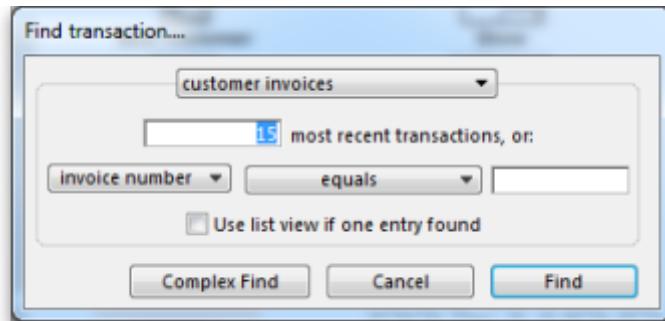
Along the top of the window are these buttons:



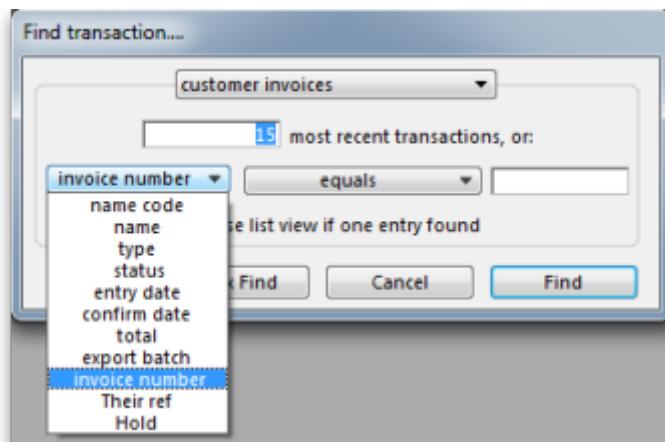
Their functions are:

## Find

Click on this button to recall the *Find Transactions* window, where several options are available.



Click on the drop down list on the left to display the options available for determining which field to query:



Choose the comparison from the next drop down list (*equals*, *starts with*, etc)



The comparison popup menu will change depending on the type of field you have chosen in the first list.

This window is very useful for quickly finding a group of invoices.

If you want to query on multiple criteria, click on the *Complex Find* button, which takes you to the Query Editor, which has powerful features to perform queries with multiple conditions. Detailed guidelines for using the Query Editor are to be found in [Working with lists](#)

### **Sum**

Click on this button to display the total value of the highlighted invoices. Highlight more than one invoice by control - clicking (Mac: command-clicking) invoices. Highlight a block of invoices by clicking on the first invoice of the series, then shift-clicking on the last invoice in the series.

### **Order by**

The invoices displayed may be sorted according to any of the columns by clicking the column heading. A more comprehensive sort facility is available when you click the *Order by* button. This displays the *order by* window, where you can drag fields from the list on the left to the right-hand pane to sort the list by the fields you have chosen.

### **Print**

Click on this button to print the list of invoices displayed. This does not print the actual invoices, just a list of them.

### **Finalise**

Click on this button to change the status of the invoice to *finalised*.

### **Duplicate**

Click on this button to duplicate the transaction. You would use this feature, for example, to supply exactly the same items to another customer. You will be asked if you want to duplicate all lines on the invoice, or just the placeholder lines.



If the invoice was part of the internal requisition process (from one virtual store to another) then the links to the originating purchase order will be maintained, and a goods



receipt will be created if you finalise the customer invoice at a later date.

## Cancel

Click on this button to cancel the highlighted transaction <sup>1)</sup>. This command only works on finalised invoices. The invoice is not deleted from the system; mSupply makes a duplicate finalised invoice with the same invoice number but with negative quantities matching those on the invoice you're cancelling. This ensures that all transactions are preserved and will appear in an audit trail. But note that you will not be able to cancel a finalised customer invoice which put stock into mSupply and some of that stock has been used. An exception to this is a stock transfer: if none of the transferred stock has been issued then the original finalised customer invoice which initiated the transfer can be cancelled if the supplier invoice produced from it is first deleted.

If you have accidentally finalised a transaction you can use the **cancel** and **duplicate** buttons to



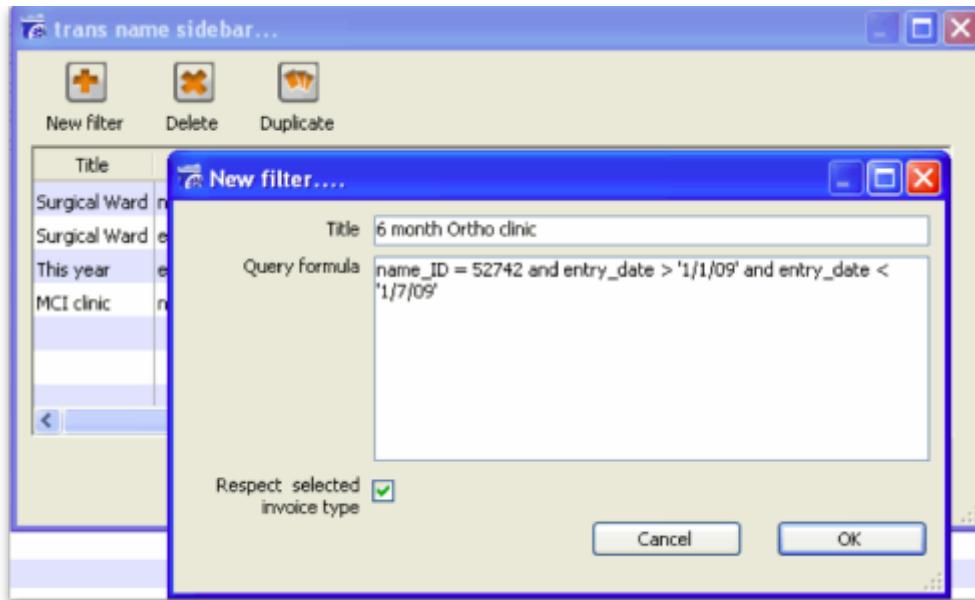
- Highlight the finalised invoice and click **Cancel**
- Hightlight the finalised invoice again and click **Duplicate** to duplicate the original transaction
- You can then edit the duplicated transaction to the correct values before finalising it again.

## Filters

Click on this button to apply filters to reduce the volume of information displayed to reflect more precisely what you require.

Take as an example, a hospital where you have searched on a large number of customer invoices, but you are really only interested in issues to the Orthopaedic Clinic during the first six months of a year.

Clicking on the *New Filter* icon presents you with a window where you can define the criteria for your filter, in our case the customer's ID is entered, and the period under review - i,e, January to June 2009 using the syntax of a WHERE clause in SQL



The *Respect selected invoice type* checkbox has the effect of applying the filter to the type of invoice which has been selected in the sidebar, and if we do this in our example, instead of displaying several hundred invoices, only the handful of invoices for the Orthopaedic clinic will be shown.

Any filters so created are listed under *My custom filters* , and are available for use as required until they are deleted.

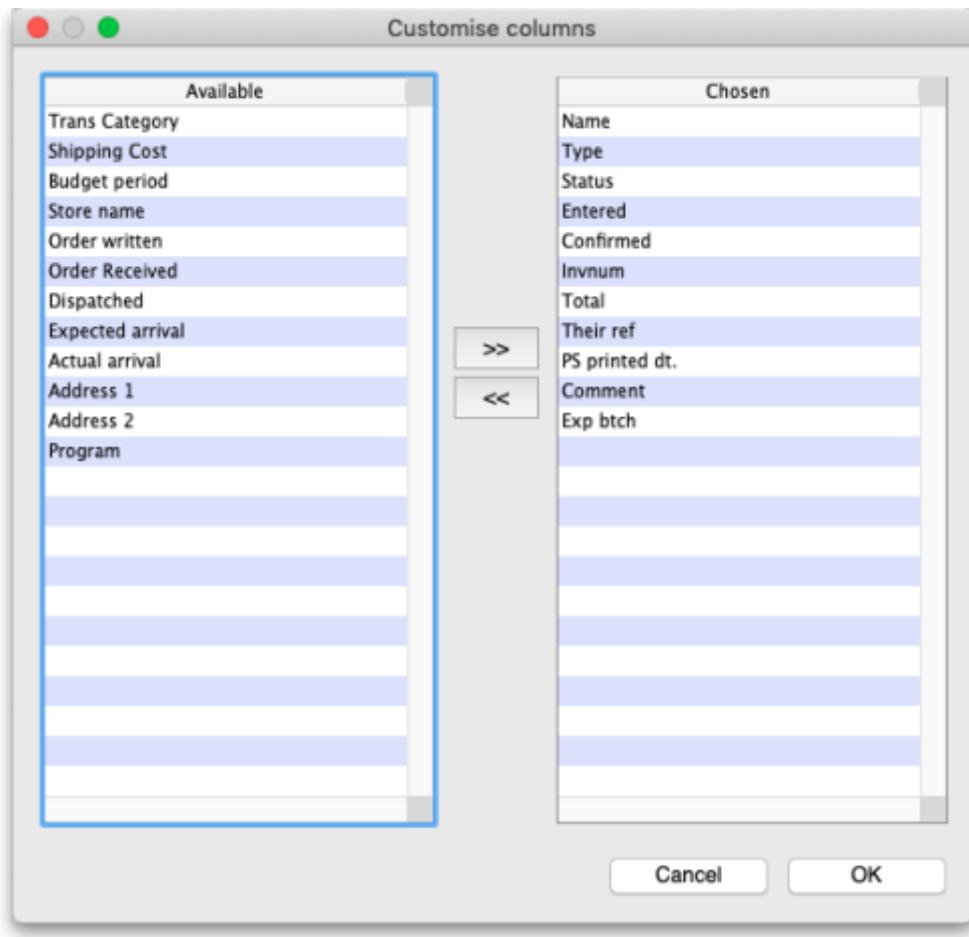
## Customise

Click on this button to:

- display the information you require
- arrange the column order display to suit your requirements

### Display the information you require

Displayed under *Available* on the left are the available fields, while displayed under *Chosen* on the right are the presently selected fields.



To add a column to the display, click on the required one to select it in the *Available* column, then click the upper button between the two displays, and it will appear at the bottom of the *Chosen* list.

mSupply provides the feature of analyzing customer invoices by their despatch/delivery/arrival dates. Once a customer invoice has delivery dates entered for it, [Transport details](#), choose the customer delivery columns 'Order written', 'order received', 'dispatched', 'expected arrival', 'actual arrival' to be included in your transaction list.

status equals sg											
Types	Name	Type	Entered	C...	Invnum	Total	Order written	Order received	Dispatched	Expected arrival	Actual arrival
Customer invoices	Aleut dental Clinic (Oral Health)	ci	sg	10/04/2013	9298	1011.57	09/04/2013	10/04/2013			
	Maubisse Hospital	ci	sg	10/04/2013	9299	1036.81	10/04/2013	10/04/2013			
	Baucau Referral Hospital	ci	sg	11/04/2013	9300	8529.68	09/04/2013	11/04/2013			
	District Services Manatuto	ci	sg	12/04/2013	9302	11082.04	10/04/2013	12/04/2013	13/04/2013	14/04/2013	17/04/2013
	District Services Manatuto	ci	sg	11/04/2013	9301	940	11/04/2013	11/04/2013	15/04/2013	20/04/2013	23/04/2013
	Suai Kota Referral Hospital	ci	sg	17/04/2013	9303	22822.01	15/04/2013	17/04/2013	19/04/2013	23/04/2013	04/05/2013

This list shows customer invoices in mSupply ordered by Expected Arrival Date. Click on the column

header to order on that column.

### Arranging column order

This is done by clicking then dragging the column heading to the required position.

### Sorting the list

Click a column heading to select it, then click on the small triangle on the right to display the list in order or reverse order as required.

### Modify

Click on this button to edit the selected invoice. This is the same as double-clicking the invoice.

### Export to MYOB

Click on this button to export the selected invoices to the [MYOB software](#) - refer to [Exporting to MYOB](#).

Previous: [Issuing Goods to a Customer \(Customer Invoices\)](#) Next: [Customer credits](#)

<sup>1)</sup>

also known as “Cancel invoice” or “Cancel a transaction” or “Cancel an invoice”

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



Permanent link:  
[https://docs.msupply.org.nz/issuing\\_goods:viewing\\_invoices?rev=1571248883](https://docs.msupply.org.nz/issuing_goods:viewing_invoices?rev=1571248883)

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