## 22.07. Transaction categories

2025/08/12 22:07

Categorizing transactions allows you to group transactions together when reviewing or reporting them. Each type of transaction can have its own list of categories. For example customer invoices might have a category "normal" and "urgent". Inventory adjustements might have categories "expired", "damaged" and "stocktake"

From the Special menu, choose Categories

•	Constant Con						
	New	Delete	Modify	Transaction type		Customer	0
	Code		Categories			Master category	
							- 1
							- 1
							_1
							_

Click on "New" button to create a new category.

Add category						
Master category	None					
Category code						
Category description						
	Cancel OK					

The categories can be added to customer, customer credit, supplier, supplier credit, repack, build, inventory adjustment while creating or editing transactions.

Once you have assigned categories they will show as a drop-down list when you enter a new invoice or transaction.

Transaction categories can be reported on, refer How to report by invoice category.

Previous: The Edit Menu Next: Virtual stores

From:

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

Permanent link: https://docs.msupply.org.nz/other\_stuff:transaction\_categories?rev=1571232983



Last update: 2019/10/16 13:36