2025/08/12 22:07

Categorising 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", "stocktake", "annual stockatake" or "monthly stocktake" etc.

From the *Special* menu, choose *Transaction categories...* to see this window:

•••		Transactio	on categories	
	Delete	Modify	Transaction type	Customer
Code		Categories		Master category
_				

First of all, select the transaction type the categories you create will belong to in the *Transaction type* drop down list. Customer (which refers to customer invoices) is selected by default so the table will contain all the previously created customer invoice categories.

Click on "New" button to create a new category and this window appears:

Add category				
Master category None				
Category code				
Category description				
Cancel				

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.



For systems using Remote Synchronisation, Transaction Categories are '**System**' data and can only be edited on the Primary Server.



There is a preference to Require category entry on customer invoices. This would apply to all customer invoices issued for all stores **Active** on the server.

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

Previous: 22.06. Edit menu | | Next: 22.08. Virtual stores

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

Permanent link: https://docs.msupply.org.nz/other_stuff:transaction_categories?rev=157504131



Last update: 2019/11/29 15:28