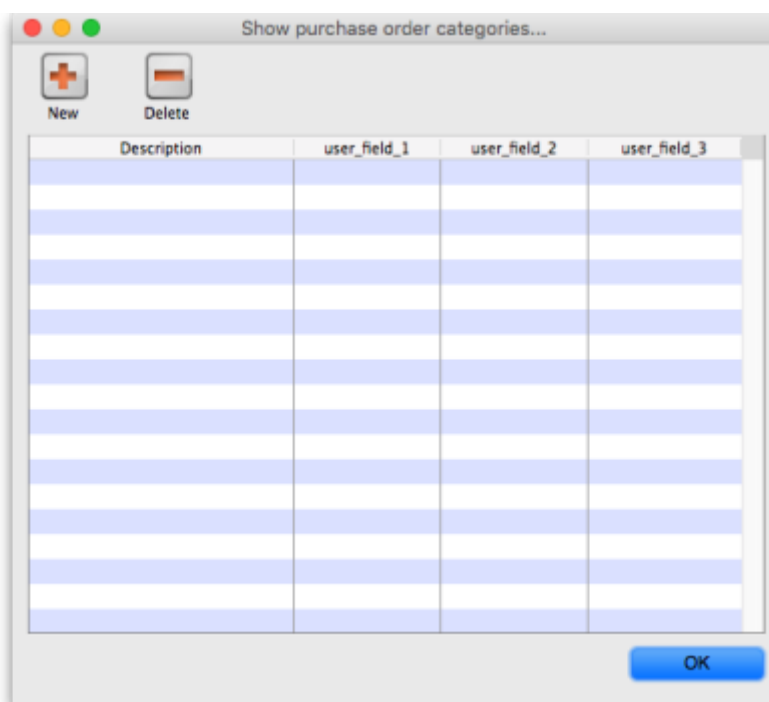


## Purchase order categories

Sometimes it's really helpful to categorise your purchase orders for reporting purposes. To allow you to do this, mSupply allows you to create purchase order categories and then apply them to purchase orders as needed.

### Viewing purchase order categories

Choose **Supplier > Show purchase order categories...** from the menus. You will be shown this window:

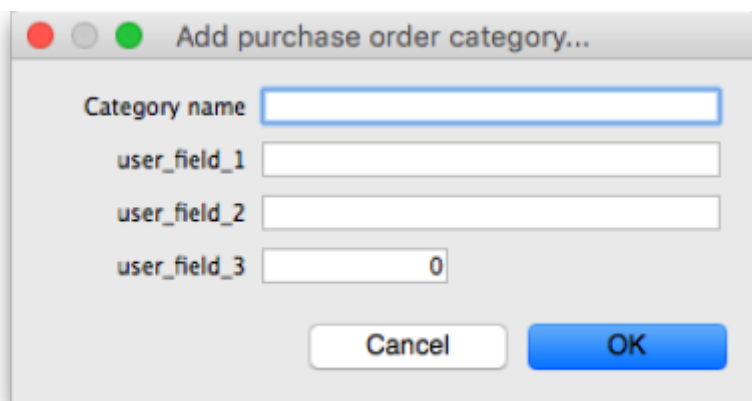


This shows a fill list of all the purchase order categories that you have at the moment. The *user\_field\_1-3* columns show the values of the custom values given to each category, which can be used to further refine your reporting later.

The functions to adding, delete and edit purchase order categories is all accessed from this window.

### Adding purchase order categories

Click on the **New** button in the window shown above to add a new category. This window will open:



The screenshot shows a macOS-style dialog box titled "Add purchase order category...". It has a standard title bar with red, yellow, and green window control buttons. Inside the dialog, there are four text input fields. The first is labeled "Category name". The second is labeled "user\_field\_1". The third is labeled "user\_field\_2". The fourth is labeled "user\_field\_3" and contains the number "0". At the bottom of the dialog are two buttons: "Cancel" and "OK".

Enter the Description of the category (this is name by which the category will be known and selected throughout mSupply) and any values for the custom fields you wish and click on the **OK** button to save the new category. You will see it immediately added to the list of available purchase order categories.

Note: user\_field\_3 takes numerical values, user\_field\_1 and user\_field\_2 take alphanumeric (any combination of letters and numbers) values.

## Deleting a purchase order category

Select the category to delete in the list of purchase order categories and click on the **Delete** button. You will be asked to confirm the deletion.

Note: you will only be able to delete a purchase order category if no purchase orders belong to it.

## Editing an existing purchase order category

To edit a purchase order category simply double-click on it in the list. The same window as for adding a new purchase order category will open populated with the selected category's details. Simply edit the details as required and click on the **OK** button to save your changes.

## Assigning categories to purchase orders

Assigning categories to purchase orders is really simple, as you'd expect! When editing or creating a purchase order, simply select the category the purchase order belongs to using the **Category** drop down list on the **General** tab:

New purchase order...

Order num : 25      Name CHNA      CHNA      Black

Confirm date : 00/00/00      Donor      Reference      Status sg

Requested delivery: 18/03/2016      Store: ESSENTIAL

General Details Ad hoc items Goods Received Supplier invoices Log Location

New line Delete lines Update EDO Info Print Confirm

Period 1/07/2015 - 30/06/20...  
Category none

show all lines      Currency      Forex rate 1

Line	Item code	Item	Orig Qty	Pack	Adj. Qty	Tot. recei...	Stock on ...	On Order	Cust.b/orders	Price Ext	Expected...	Store:
1	ES10023	Chlorpromazine 100mg Tab	150000	500	150000	0	416500	225000	269500	366.00		ESS...

Supplier discount  
Percentage 0      Discount amount 0.00

Estimated subtotal 366.00  
Estimated cost after discount 366.00

☐ Locked      ☐ Auto calc usage

☐ Finalize order      ☐ Authorise

OK & Next      Delete      OK

The drop down list will contain all the categories you have added.

Previous: [Managing Purchase Orders](#) Next: [Ordering from one store to another](#)

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Last update: **2017/07/28 14:20**

