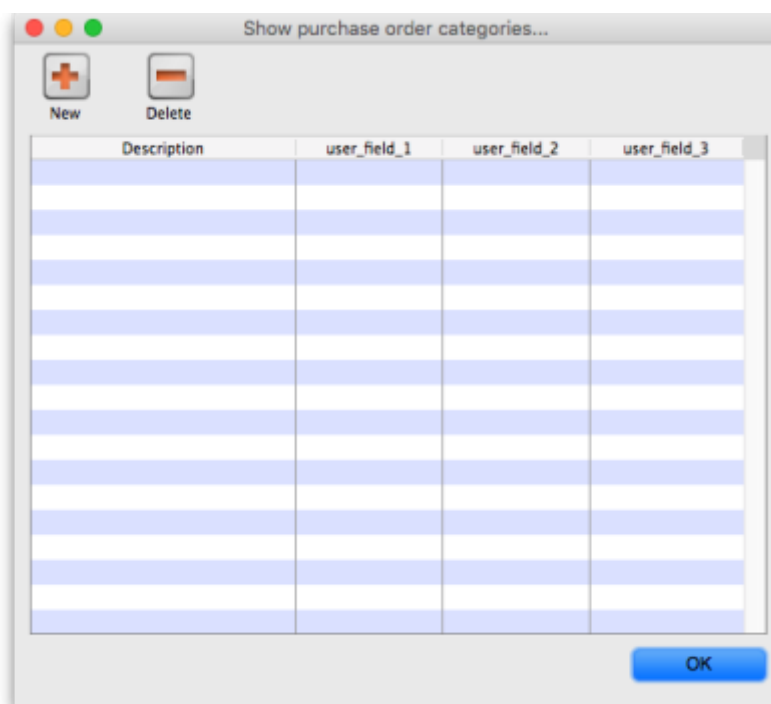


## 6.03. Purchase order categories

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:

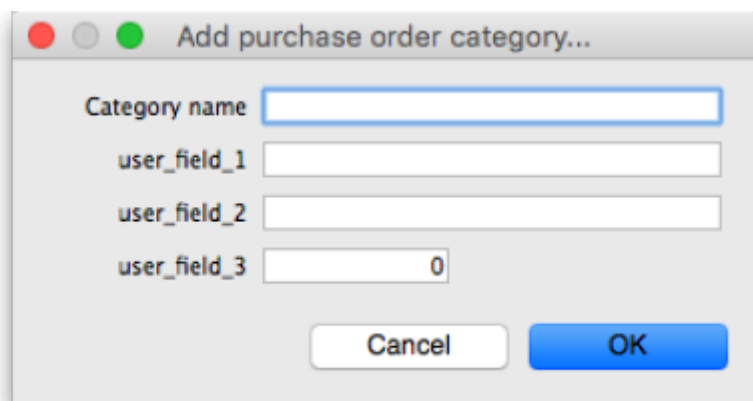


This shows a fill list of all the purchase order categories that you have at the moment. The *user\_field\_1-3* columns show the values of the custom values given to each category, which can be used to further refine your reporting later.

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 light gray background and standard window controls (red, yellow, green buttons) in the top-left corner. Inside the dialog, there are four input fields stacked vertically. The first is labeled "Category name" and is empty. The second is labeled "user\_field\_1" and is empty. The third is labeled "user\_field\_2" and is empty. The fourth is labeled "user\_field\_3" and contains the number "0". At the bottom of the dialog, there are two buttons: "Cancel" (white with a gray border) and "OK" (blue with white text).

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	Chlormazine 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 the descriptions of all the categories you have added.

Previous: [7.2. Managing Purchase Orders](#) | Next: [7.4. Ordering from one store to another](#)

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