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:



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:



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

// Previous: **6.02. Managing purchase orders**	Next: **6.04. Ordering from one store to another** //

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

Permanent link:
https://docs.msupply.org.nz/purchasing:show_po_categories?rev=1571744915

Last update: **2019/10/22 11:48**