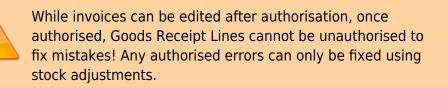
# 22.16. Authorisation

Sometimes it is important that goods are not distributed to customers or receipted into stock until such an action has been authorised. mSupply has invoice authorisation functionality to make this possible and allows, for example, a manager to control the processing of invoices.



When invoices have to be authorised, it means that they cannot be confirmed until they have been authorised i.e. invoices without authorisation are held at status 'sg' or suggested. This means the official invoice can not be printed (and goods taken out of or receipted into stock) until the invoice has been authorised.

## Configure mSupply for authorisation

You can set the authorisation of customer and supplier invoices and Goods Receipt Lines independently. You do it by setting the store preferences to make authorisation compulsory:

• Click on the **Special> Show stores..** menu item, click the **Preferences** tab. Now check the appropriate boxes as required. This is shown on the following screenshot:

1 Edit store	
Gyogone Central PMCT NAP	
General Preferences Logo Synchronization	
Sort available batches by VVIII Status rather than Expiry         Patients created in this store not visible in other stores         Items created in this store not visible in other stores         Allow users to enter total quantities to distribute         Round up the distributed quantity         Able to pack items into multiple boxes         Store : Able to issue in foreign currency         Allow editing selling price on customer invoice lines         Prinatize customer invoices automatically         Customer invoices must be authorised         Authorisation needed only if over budget         Confirm customer invoices without asking         Goods received lines must be authorised         Confirm Suppler invoices must be authorised         Confirm Suppler invoices must be authorised         Confirm Suppler invoices without asking         Goods received lines must be authorised.         Locations must be entered for goods received.         Able to specify manufacturer when receiving, ordering or quoting for items         Show item unit column while issuing	When finalising a Goods Receipt
	Cancel OK

• Finally, click on the *OK* button to close the window and save the preferences. From now on, the invoice types you set the preferences for must be authorised before being confirmed.

### Supplier invoice authorisation

With the *Supplier invoices must be authorised* store preference set, your newly created supplier invoices will look like this:

00			Supplier	invoice				
Name Their ref Comment			Confire Category I ult Donor:	y date : 22/05 n date : 22/05 None mmary by Bate	\$	Go	Colour : nvoice number : 2,0 Status : cn sods receive ID : 0 chase Order ID : 0 Entered by : Sus Store : Ger	10 Isol
Lo Ab	Item Name acavir 300 mg	Qty Pa		Expiry 01/01/2016	Cost Price 20.00000	Sell Price 20.40000	Price extens	ion 200.00000
Hold Finalize	Other charges Item(s): Amount: 0.0 Export batch: 0 Margin: 2.00	0000			OK & Next	Delet	Subtotal: 0 % tax: Total: te OK	200.00000 0.00000 200.00000

Notice the **Authorised** checkbox at the bottom left of the window. If you click the *OK* button button with this checkbox unchecked, you will get a warning message telling you that unconfirmed invoices cannot be confirmed and nothing will happen. If you have the permission set to allow you to authorise invoices (see here for details) then you can click on the *Authorise* checkbox and continue. However, if you do not have the permission set, the *Authorised* checkbox will be disabled and you cannot authorise the invoice. Another user who has the permission must check the box for you before you can proceed.

#### Unauthorising supplier invoices and inventory additions

If you have permission to authorise an invoice, you can also unauthorise it. If the invoice has status "NW" then it has not been entered into stock, and you can allow users to edit it and you will still control the process of authorisation before the goods are put into stock. *However*, if the invoice is already confirmed, the goods have already been entered into stock, and any changes users make will affect stock levels immediately, even though the invoice is not authorised. Therefore, only unauthorise a confirmed invoice to make immediate changes yourself, then immediately reauthorise it.

Alternatively, if goods have not been issued, you can delete the lines off the invoice (and optionally then delete the whole invoice) and require users to enter a new invoice to receive the stock, and the normal authorisation process will apply to the new invoice.

#### **Customer invoice authorisation**

With the *Customer invoices must be authorised* store preference set, newly created customer invoices will look like this:

Name Acu	mao/Remexio CHC	-	Co	nfirm date	23/05/20	13		Colour :	Black
Their ref	AIL-403	-2						Invoice : 9,2	252
Comment				Category	None		\$	Entry date : 23	/05/2013
								Goods receive ID: 0	
								Status : cn	
<b>•</b>	Delete l'actei		13	_				Entered by : Su	ssol
New line	Delete line(s)	_	Backo		History			Store : Ge	neral
	Gener	Summary by	Item S	ummary by I	Batch   T	ransport det	tails Log		
. L Location			Quan	Pack Size	Batch	Exp date		Price exten	
1	Acces Pin With Stopper for use	IV.Inj. site	2	1			0.61148		1.22296
		_							
	_	Other charges	Item:					Amount:	0.0000
L 🚺 🗾 🖬	<u>.</u>	other charges	item.					Subtotal:	1.2229
								0 % tax:	0.0000
								Total:	1.2200
Hold									
Finalize	Export batch: 0								

Again, notice the *Authorised* checkbox at the bottom left of the window. This behaves exactly the same as the *Authorised* checkbox on the bottom left of a supplier invoice: the customer invoice cannot be confirmed until this checkbox is saved as checked. And, once again, if you do not have the *Can authorise invoices* permission set, it will be disabled and you will be unable to authorise the invoice; someone else, with the permission set, must do it for you.

#### Printing invoices which must be authorised

When an invoice is not authorised an attempt to print it will produce an invoice with an 'Unauthorised' watermark, just like this:

							Page 2 of 2
upplied to : itibe/Ustaco						Comment : Ma	Status: cn
itibe, OECUSSI						Confirmed: 1	
100,000000				<u> </u>			3/05/2012
woice Category :						uthorized by :	310312013
omments : Maria Rit	eiro.			$\sim$		Collected by :	
Line Item		0.00	Pack Batch	Expiry	Price	Extension	Box
	2.5 ml w/needle 0.6x 25 mm 2,5ml	Quan 100	1 none	00/00/00	0.00	0.00	DOX
	5 ml, w/needle 0.7x30 mm 5ml	100	1 4204003	31/12/16	0.00	0.61	
	19 G x 1.1/2 (box/100) 1.1 x 40 mm	100	1	00/00/00	0.01	1.22	
27 Disposable Needle	21 G x 1.1/2 (box/100) 0.7 x 25 mm	100		00/00/00	0.01	1.00	
28 Disposable Needle	23 G x 1.1/4 0.65 x 32mm	100	1	00/00/00	0.01	1.00	
		1. []	*		То	tal: 647.68000	
				_			
-							
Prepared By :	Signature : D	lelivered By :	Signature:				
Checked By :	Signature : R	eceived By :	Signature:				
Authorised By :	Signature :						
				-			

As soon as the invoice is authorised it will print normally without the unauthorised watermark.

#### **Purchase order authorisation**

Purchase Orders can also be authorised - refer to Authorising Purchase Orders.

## View authorisation logs

mSupply records the authorisation and unauthorisation of invoices and creates a log record every time the authorisation status of an invoice changes. To view the log records click on the log tab of an invoice, as shown in the screenshot below.

00		Customer invoice [Read Only]	
Name	- 1	Confirm date 23/05/2013	Colour : Black
Their ref	DILI-099-1		Invoice : 9,259
Comment	•	Category None	Entry date : 23/05/2013
			Goods receive ID : 0
			Status : fn
			Entered by :
	General Summ	ary by Item Summary by Batch Transport de	Store : General
Date	Time Us	r	Event
23/05/2013	11:11:01	2 Customer invoice is authorised.	
23/05/2013	11:10:24	2 Customer invoice is un-authorised.	
23/05/2013	11:09:49	2 Customer invoice	
23/05/2013	11:09:39	2 Customer invoice is authorised.	
23/05/2013	11:09:30	2 Customer invoice 9259	
		OK &	& Next Delete OK

You can also view all logs from **Special > View log...**. See here for details.

Previous: Foreign currency transactions Next: Miscellaneous labels

