

22.16. Authorisation

Sometimes it is important that goods are not distributed to customers or received 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.

Authorisation can be set according to local needs for:

- Customer Invoices
- Supplier Invoices
- Request Requisitions
- Response Requisitions
- Purchase Orders

Authorisation can either occur within mSupply or externally using the mSupply web authorisation system (see [Remote authorisation](#)).



Invoices can be edited after authorisation but **goods receipt lines cannot be unauthorised** to fix mistakes! Any authorised errors can only be fixed using stock adjustments.



When invoices have to be authorised, they **cannot be confirmed until they are authorised**. Until then:

- Unauthorised invoices are held at suggested (sg) status
- The official invoice cannot be printed
- Goods are not removed from or received into stock

Configuring mSupply for authorisation

Turning on authorisation

Authorisation must be set up for **each store independently**. For each store, you can decide which transaction types require authorisation.

1. Click the **Special** tab, then click **Stores**.
2. Double click the store to edit.

3. Click the **Preferences** tab.
4. Check the boxes to set compulsory authorisation for specific transaction types at that store.
5. Click **OK**.

Edit store

Gyogone Central PMCT NAP

General Preferences Logo Synchronization

☐ Sort available batches by VVM Status rather than Expiry

☐ Patients created in this store not visible in other store

☐ Names 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

☒ Purchase order must be authorised

☐ Finalize customer invoices automatically

☒ Customer invoices must be authorised

☐ Authorisation needed only if over budget

☐ Confirm customer invoices automatically

☒ Supplier invoices must be authorised

☐ Confirm Supplier 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

☒ Don't receive goods into stock until Supplier Invoice is taken off hold

☐ Receive goods into stock, and leave Supplier Invoice confirmed

☐ Receive goods into stock, and finalise Supplier Invoice immediately

For stock transfers, the Supplier Invoice in the receiving store should be:

☒ Finalised ☐ On hold

Cancel OK

From now on, the transaction types you set the preferences for must be authorised before being confirmed.

Setting up authorisers

To use the authorisation module, certain users must be designated as **Authorisers** for each store and transaction type requiring authorisation.

Give the user permission to be an authoriser:

1. Click the **Admin** tab, then click **Edit Users**. Double click on the user to edit.
2. Go to the **Permissions** tab and the **Permissions (2)** tab and check the boxes that give the user permission to authorise specific transaction types.

User

Alba

Store:

General Warehouse

General

Permissions

Permissions (2)

Permissions (3)

Login rights

Details

Ordering

☒ View purchase orders
 ☒ Delete purchase orders
 ☒ Edit purchase orders
 ☒ Edit purchase order pricing
 ☒ Manage tenders
 ☒ Finalise purchase orders
 ☒ Authorise purchase orders

Items

☒ Create new items
 ☒ View items
 ☒ Edit items
 ☒ Delete items
 ☒ Duplicate items
 ☒ Create repacks or split stock
 ☒ Edit repacks
 ☒ View pricing information for items
 ☒ Edit item units list
 ☒ Merge two items...
 ☒ Add / edit departments
 ☒ Modify sell and cost prices of existing stock
 ☒ Add / edit master list
 ☒ Create and edit custom stock field value lists

Supplier invoices with issued stock

☐ Update pack size, cost and sell price

☒ Create purchase orders
 ☒ Confirm purchase orders
 ☒ Create & edit backorders
 ☒ Create new quotes
 ☒ Edit & delete quotes
 ☒ Duplicate purchase orders
 ☒ Print purchase orders

☒ View inventory adjustments
 ☒ Enter inventory adjustments
 ☒ Edit Inventory adjustments
 ☒ View cost prices of stock
 ☒ Edit item names, codes and units
 ☒ View DDD information for items
 ☒ Manage item access
 ☒ Manage drug interaction groups
 ☒ Manage locations
 ☒ Make item inactive
 ☒ Edit item default price
 ☒ Consolidate stock
 ☒ View stock
 ☒ Edit stock
 ☒ Modify donor on stock and transaction lines

Admin

☒ Add / edit users
 ☐ Access server administration
 ☒ Edit authorisers
 ☒ Clone database
 ☒ Edit insurance providers
 ☒ Edit periods and period schedules

Goods receiving

☒ View goods received
 ☒ Add/edit goods received
 ☒ Authorise goods received
 ☒ Finalise goods received

Special

☒ Add / edit currencies
 ☒ Add / edit reminders
 ☒ View and print labels
 ☒ Add / edit misc labels
 ☒ Add / edit abbreviations
 ☒ Add / edit warnings
 ☒ Add / edit prescribers
 ☒ Add / edit transaction categories
 ☒ Add / edit contacts
 ☒ Merge prescribers
 ☒ Add and edit options

Tenders...

☒ Create & edit tenders

All on

Copy

Paste

Delete

Cancel

OK

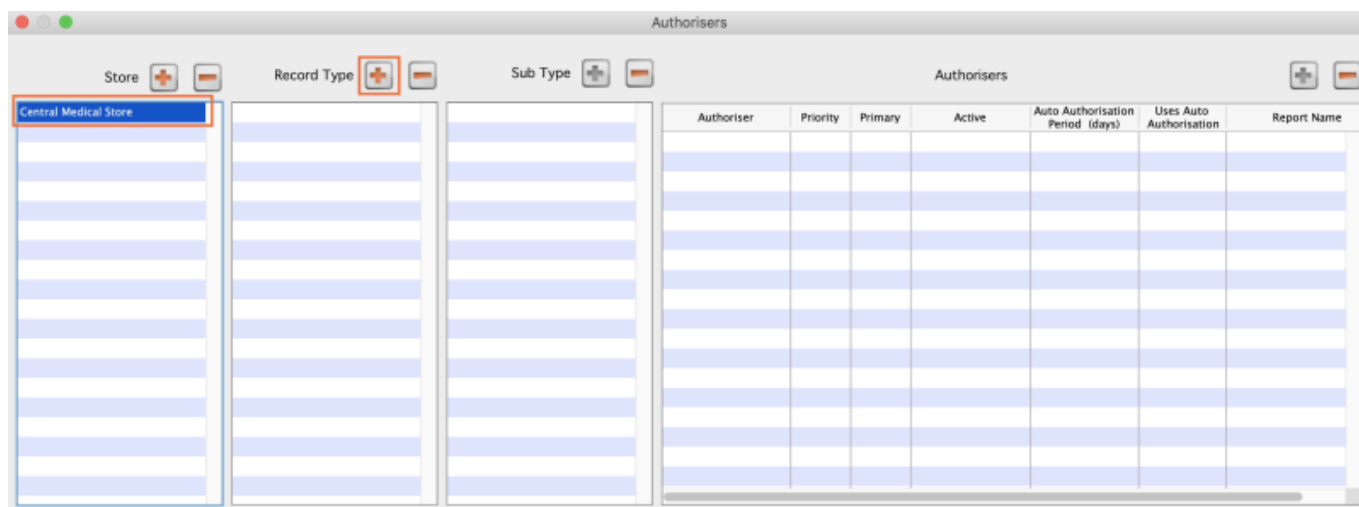
3. Click **OK** until you return to the navigator home page.

4. Click on **Special > Show Authorisers**.

[illegible]

6. Choose the store to allocate authorisers to and click **OK**.

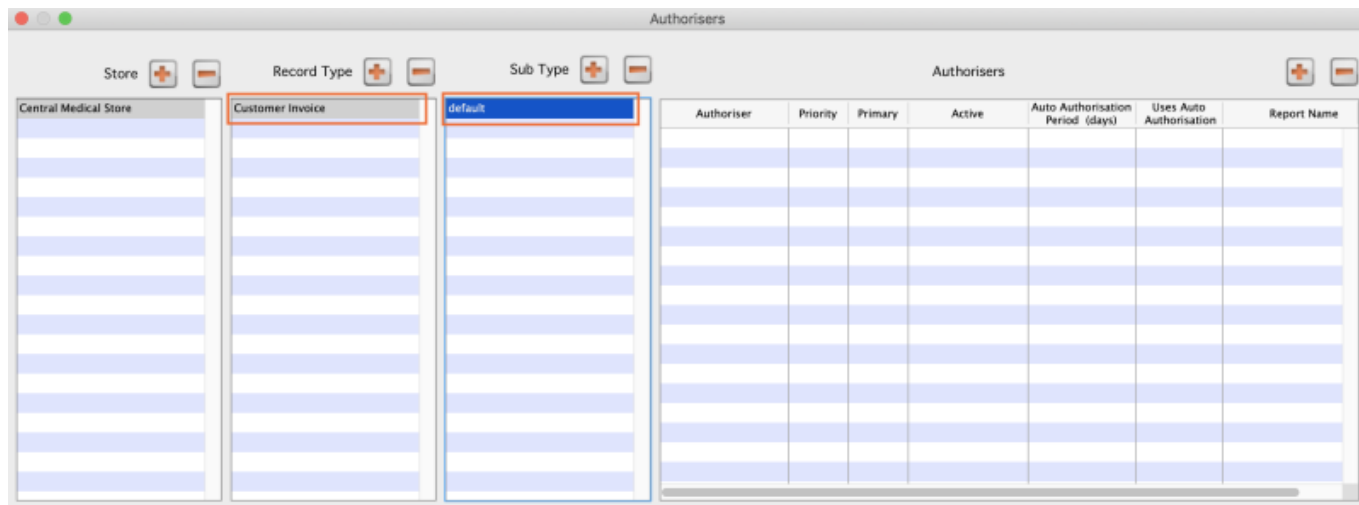
7. Select the store from the list, then click the **Plus** button in the **Record Type** column.



The screenshot shows the 'Authorisers' window with three columns: 'Store', 'Record Type', and 'Sub Type'. The 'Store' column has a list with 'Central Medical Store' selected. The 'Record Type' column has a plus button highlighted with a red box. The 'Sub Type' column also has a plus button. The 'Authorisers' table on the right is empty with columns: Authoriser, Priority, Primary, Active, Auto Authorisation Period (days), Uses Auto Authorisation, and Report Name.

8. Choose the type of transaction to allocate authorisers. Select from Customer Invoices, Supplier Invoices, Request Requisitions or Response Requisitions and click **OK**.

9. Select the record type from the list, then click **Default** to allow authorisation for all sub types. Alternatively, click the **Plus** button in the **Sub Type** column to create further specifications (e.g. if certain users can authorise customer invoices for some facilities only).



The screenshot shows the 'Authorisers' window with three columns: 'Store', 'Record Type', and 'Sub Type'. The 'Store' column has 'Central Medical Store' selected. The 'Record Type' column has 'Customer Invoice' selected. The 'Sub Type' column has 'Default' selected. The 'Record Type' and 'Sub Type' columns have plus buttons highlighted with red boxes. The 'Authorisers' table on the right is empty with columns: Authoriser, Priority, Primary, Active, Auto Authorisation Period (days), Uses Auto Authorisation, and Report Name.

10. In the **Authorisers** section, click the **Plus** button to add authorisers for that specific transaction type (and sub type) in that specific store. You will only be able to allocate users that have permission to be authorisers (steps 1 - 3).

[illegible]

Supplier invoice authorisation

When the **Supplier invoices must be authorised** store preference is set, new supplier invoices will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the supplier invoice can be confirmed.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is *unchecked*, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.

Supplier invoice

Name:	Abbot Laboratories (singapore PTE.LTD)	Entry date :	22/05/2013	Colour :	Black
Their ref :	SNG102	Confirm date :	22/05/2013	Invoice number :	2,010
Comment :		Status :	cn	Goods receive ID :	0
New line	Delete line	Category :	None	Purchase Order ID :	0
		Default Donor :		Entered by :	Sussol
				Store :	General

Tabs: General | Summary by Item | Summary by Batch | Price | Log

No.	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	Abacavir 300 mg	10	1	1.1.1	01/01/2016	20.00000	20.40000	200.00000

Other charges		Subtotal:	200.00000
Item(s) :		% tax:	0.00000
Amount:	0.00000	Total:	200.00000

Hold Export batch: 0
Finalize Margin: 2.00
☒ Authorised

OK & Next Delete OK

If you have permission to authorise a supplier invoice, you can also **unauthorise** it.



- If the invoice has a **new (nw)** status then it has not been entered into stock. If you unauthorise it, users can edit it and you will still control the process of authorisation before the goods are entered into stock.
- However, if the invoice is **confirmed (cn)**, the goods have already been entered into stock. If you unauthorise it, 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 delete the whole invoice) and require users to enter a new invoice to receive the stock. The normal authorisation process will then apply to the new invoice.

Customer invoice authorisation

When the **Customer invoices must be authorised** is set, new customer invoices will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the customer invoice can be confirmed.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is *unchecked*, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.

Customer invoice

Name: Acumao/Remexio CHC Confirm date: 23/05/2013 Colour: Black

Their ref: AIL-403-2 Category: None Invoice: 9.252

Comment: Entry date: 23/05/2013

Goods receive ID: 0

Status: cm Entered by: Sussol

Store: General

New line Delete line(s) Backorders History

General Summary by Item Summary by Batch Transport details Log

L	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
1		Acces Pin With Stopper for use IV.Inj. site	2	1			0.61148	1.22296

Other charges Item:

Amount: 0.00000

Subtotal: 1.22296

0 % tax: 0.00000

Total: 1.22000

☐ Hold ☐ Finalize ☒ Authorised


Export batch: 0

OK & Next Delete OK

Purchase order authorisation

When the **Purchase order must be authorised** store preference is set, new purchase orders will contain an **Authorised** checkbox.

An unauthorised purchase order **can** still be confirmed and have goods receipted against it so it is not as restrictive as, for example, a customer invoice or supplier invoice.



Sames

Invoice: 9181
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Supplied to :
Nitibe/Ustaco
Nitibe, OECUSSI

Status: cn
Comment : Maria Ribeiro
Confirmed: 11/12/2012
Printed: 23/05/2013

Invoice Category :
Comments : Maria Ribeiro

Authorized by :
Collected by :

Line	Item	Quan	Pack	Batch	Expiry	Price	Extension	Box
24	Syringe Disposable 2.5 ml w/needle 0.6x 25 mm 2,5ml	100	1	none	00/00/00	0.00	0.00	
25	Syringe Disposable 5 ml, w/needle 0.7x30 mm 5ml	100	1	4204003	31/12/16	0.00	0.61	
26	Disposable Needle 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	1		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	
						Total: 647.68000		

Prepared By :
Checked By :
Authorised By :

Signature :
Signature :
Signature :

Delivered By :
Received By :
Signature :

Signature:
Signature:
Signature:

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.

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You can also view all logs from **Special > View log...** See [here](#) for details.

Previous: [Foreign currency transactions](#) Next: [Miscellaneous labels](#)

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