## **Invoice Authorisation**

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mSupply provides the feature of subjecting Customer and Supplier Invoices to authorisation. Authorisation may be done for a number of reasons, typically value based, and may set to be allowed by only a restricted user or set of users. <note>Invoices that are subject to authorisation and are unauthorised are held in status 'sg' or suggested status. This means the official invoice can not be printed until the invoice is authorised.</note>

#### Configure mSupply for Invoice Authorisation

- First give the appropriate user the permission to manage authorisation of invoices.
- Click drop down menu File> Edit Users... double click the appropriate user and in the window that appears click on tab **Permissions (3)** and tick to turn on the Edit Store Details checkbox and click **OK**.

User Sussol
General       Permissions       Permissions (2)       Permissions (3)       Log-on modes       Details         Document management       Virtual Stores       Image: Create new stores       Image: C
Document management     Virtual Stores       Tenders     Image: Create new stores       Image: Upload document     Image: Create new stores       Image: Download document     Image: Create new stores       Image: Create new stores     Image: Create new store
Tenders       ✓ Create new stores         ✓ Upload document       Edit store details         ✓ Download document       ✓ Edit visiplinity in stores         ✓ Delete document       Reminder
✓       Upload document         ✓       Download document         ✓       Delete document         ✓       Modify quotes entered by the supplier (via the website)         Items Lines (Batches of stock)       ✓         ✓       Upload document         ✓       Download document         ✓       Download document         ✓       Download document         ✓       Delete document         ✓       Export & import         ✓       Backup data file         Stocktake       Mod stocktake lines         ✓       View stocktake lines         ✓       Delete stocktake lines         ✓       Can edit stocktake dates
All on Delete Cancel OK

#### Configure mSupply for Invoice Authorisation

• Set Store preferences to allow for authorisation of invoices. Click drop down menu Special>

# **Store..** click tab **Preferences** and check boxes **Customer invoices must be authorised** and **Supplier invoices must be authorised**. Click OK to return to the Navigator.

O ○ Edit store	
General Preferences Log	go Visibility
<ul> <li>Sort available batches by VVM Status rather than Expiry</li> <li>Patients created in this store not visible in other store</li> <li>Names created in this store not visible in other stores</li> </ul>	Custom stock field Use custom field 1 Custom field label 1 Custom field 1 Use custom field 2
<ul> <li>Allow users to enter total quantities to distribute</li> <li>Round up the distributed quantity</li> <li>Able to pack items into multiple boxes</li> <li>Store mode : Able to issue in foreign currency</li> <li>Allow editing selling price on customer invoice lines</li> <li>Finalize customer invoices automatically</li> <li>Customer invoices must be authorised</li> <li>Confirm customer invoices automatically</li> <li>Supplier invoices must be authorised</li> <li>Confirm supplier invoices without asking</li> </ul>	Custom field label 2 Custom field 2 Use custom field 3 Custom field label 3 Custom field 3 Use custom field 4 Custom field label 4 Custom field 4
For stock transfers, the supplier invoice in the receiving store should be:	
	Cancel

#### Create a Supplier Invoice for authorisation

From the Navigator click section Suppliers and click New Supplier Invoice. Enter your supplier and add items to the Invoice.

Click the authorise button at the bottom left of the window.

#### Create a Customer Invoice for authorisation

From the Navigator click section Customers and click New Customer Invoice. Enter your customer and add items to the Invoice.

00				S	upplier i	nvoice				
Name Ab Their ref Comment	bbot Laboratories (sing	apore PTE.LTD SNG102			Entry Confirm	y date : 22/05 n date : 22/05	/2013	1	Colour : Invoice number : 2,010 Status : cn	Black
New line	Delete line	General	( Summa	Ca Default I ry by It	tegory N Donor: em Sur	ione nmary by Batc	¢	Pur	chase Order ID : 0 Entered by : Susso Store : Gener	l al
Lo	Item Name		Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension	n (
<u>s</u> .	Other ch. Item Amou	arges (s):	00						Subtotal: 0 % tax: Total:	200.0000 0.0000 200.0000
Hold Finalize Authorised	Export batch: 0 Margin: 2	.00					OK & Next	Dele	te OK	

Click the authorise button at the bottom left of the window and click OK to return to the Navigator.

<note>Log in as another user while the invoice is not authroised to show the user cant confirm the invoice.</note>

#### Prin an invoice with Authorisation status set

When an invoice is not authorised an attempt to print it will produce and invoice with an 'unauthorised' watermark.

- From the Navigator click section Customers and select View Customer Invoices
- Select an invoice with unset authorisation.
- In the main invoice window that appears select the **Print** check box at the bottom right and and click **OK**.

upplied to :							Status: cn
itibe/Ustaco						Comment : Ma	ria Ribeiro
itibe, OECUSSI						Confirmed: 1	1/12/2012
						Printed: 2	3/05/2013
nvoice Category :					A	uthorized by :	
omments :	Maria Ribeiro					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 Disposab	le Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
27 Disposab	vie Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100	1 ·	00/00/00	0.01	1.00	
28 Disposab	le Needle 23 G x 1.1/4 0.65 x 32mm	100	1	00/00/00	0.01	1.00	
		151.	~		т	otal: 647.68000	
Prepared By :	Signature :	Delivered By :	Signature:	_			
Checked By :	Signature :	Received By :	Signature:				
Authorised By :	Signature :						

NOTE: The unauthorised watermark on the background of the invoice.

### View authorisation logs

When an invoice is authorised a log is created. View authorisation logs from log tab.

00		Custo	mer invoice [Read Only]		
Name	_	I.	Confirm date 23/05/2013		Colour : Black
Their ref	DILI-099-1	1			Invoice : 9,259
Comment			Category None	: 6:	Entry date : 23/05/2013
comment		•			Coods receive ID : 0
					Status - fe
					status . In
					Entered by :
					Store : General
	General	Summary by Item	Summary by Batch Transport detail	ils Log	
Data	Time	line		Funnt	
23/05/2013	11:11:01	User	Customer invoice is authorised	Event	
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 & N	ext I	Delete OK
			Church		

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