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**.

	Edit user
User Sussol General Permission	ns Permissions (2) Permissions (3) Log-on modes Details
Document management	Virtual Stores
Tenders Image: Upload document Download document Delete document Upload document Image: Upload document <	✓ Create new stores Edit store details ✓ Edit visionity in stores Reminder ✓ Edit and delete reminders assigned to me Admin ✓ Send email ✓ Purge old records ✓ View log ✓ Set start of year stock ✓ View/edit preferences ✓ Export & import ✓ Backup data file
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.

00	Edit st	ore	
 Sort available batches by VVM Status rather Patients created in this store not visible in o Names created in this store not visible in o Allow users to enter total quantities to dist Round up the distributed quantity Able to pack items into multiple boxes Store mode : Able to issue in foreign currer Allow editing selling price on customer inwo Finalize customer invoices automatically Customer invoices must be authorised Confirm customer invoices automatically Supplier invoices must be authorised Confirm supplier invoices without asking 	Ceneral Preferences r than Expiry other store ther stores ribute ncy oice lines	Logo Visibili	ty Custom stock field Use custom field 1 Custom field label 1 Custom field 1 Use custom field 2 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
	e receiving store should be On hold	e:	
			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 A Their ref Comment New line	bbot Laboratories (singapore PTE.LTD SNG102 Delete line General		Ca Default	Confirm tegory N Donor:	y date : 22/05 n date : 22/05 ione	\$	Goo Purch	Colour : voice number : 2,01 Status : cn ds receive ID : 0 hase Order ID : 0 Entered by : Suss Store : Gene	ol
Lo	Item Name	_	Pack	Batch	Expiry	Cost Price	Sell Price	Price extensio	
1 Abai	cavir 300 mg	10	1	1.1.1	01/01/2016	20.00000	20,40000		200.00000
	Other charges					7		Subtotal:	200.0000
S 🗾 🤇		0000						0 % tax: Total:	0.00000
Hold Finalize Authorised	Export batch: 0 Margin: 2.00					OK & Next	Delete	еОК	

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**.

and the second	-							Page 2 of 2
								age z or z
upplied to	:							Status: cn
itibe/Ustac	60						Comment : Ma	ria Ribeiro
itibe, OEC	USSI						Confirmed: 1	1/12/2012
							Printed: 2	3/05/2013
woice Cate	egory :					A	uthorized by :	
omments :				/			Collected by :	
Line			Quan	Pack Batch	Expiry	Price	Extension	Box
		l w/needle 0.6x 25 mm 2,5ml	100	1 none	00/00/00	0.00	0.00	5000
		w/needie 0.7x30 mm 5ml	100	1 4204003	31/12/16	0.00	0.61	
		(1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
		(1.1/2 (box/100) 0.7 x 25 mm	100		00/00/00	0.01	1.00	
	Disposable Needle 23 G x		100	1	00/00/00	0.01	1.00	
						Те	tal: 647.68000	
							cal. 047.00000	
Prepared	By:	Signature :	Delivered By :	Signature:				
Checked I	By :	Signature :	Received By :	Signature:				
Checker	by .	ogradu.	Necessary .	orginations.				
	d 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 : Blac
Their ref	DILI-099-1				Invoice : 9,259
Comment			Category None	: 🕞	Entry date : 23/05/2013
comment		1			Goods receive ID : 0
					Status : fn
					Entered by :
					Store : General
	General	Summary by Item	Summary by Batch Transport detail	ils Log	
Date	Time	User		Event	
23/05/2013	11:11:01		Customer invoice is authorised.	Event	
23/05/2013	11:10:24		Customer invoice is un-authorised.		
23/05/2013	11:09:49		Customer invoice		
23/05/2013	11:09:39		Customer invoice is authorised.		
23/05/2013	11:09:30	2	Customer invoice 9259		
			OK & N	ext I	Delete OK
			OKAN		

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