

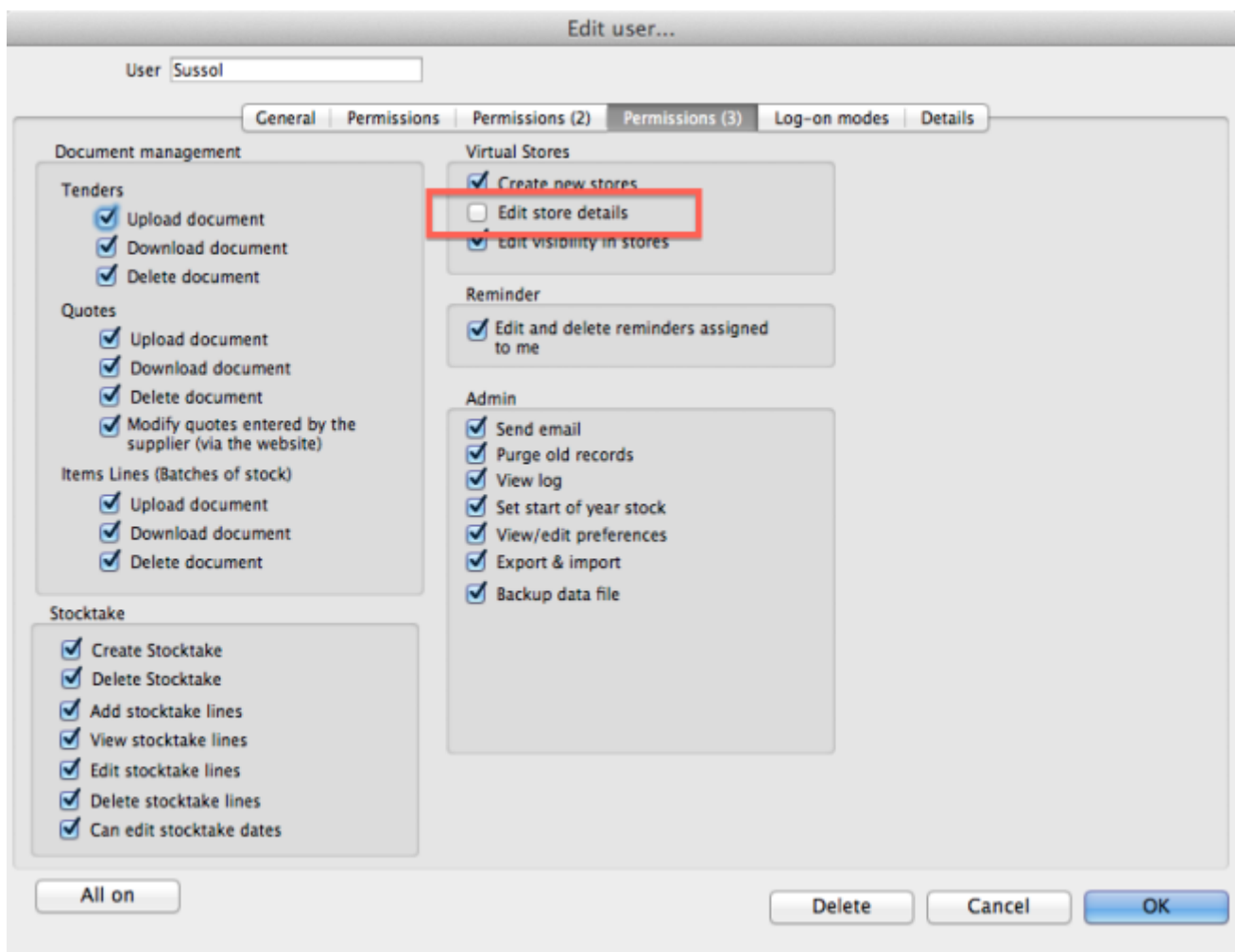
Invoice Authorisation

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mSupply provides the feature of subjecting Customer and Supplier Invoices to authorisation. This feature allows a manager to control the processing of invoices and may be set to be allowed only by 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**.



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.

The screenshot shows the 'Edit store' dialog box with the 'Preferences' tab selected. The 'General' tab is also visible. The 'Custom stock field' section is expanded, showing four custom fields with labels 'Custom field 1' through 'Custom field 4'. The 'Customer invoices must be authorised' and 'Supplier invoices must be authorised' checkboxes are checked. The 'For stock transfers, the supplier invoice in the receiving store should be:' section has 'Finalised' selected. The 'Cancel' and 'OK' buttons are at the bottom right.

Edit store

General Preferences Logo Visibility

☐ 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

☐ Allow users to enter total quantities to distribute

☐ Round up the distributed quantity

☐ Able to pack items into multiple boxes

☐ Store mode : Able to issue in foreign currency

☐ Allow editing selling price on customer invoice lines

☐ Finalize customer invoices automatically

☒ Customer invoices must be authorised

☐ Confirm customer invoices automatically

☒ Supplier invoices must be authorised

☐ Confirm supplier invoices without asking

For stock transfers, the supplier invoice in the receiving store should be:

☒ Finalised ☐ On hold

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

Cancel OK

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 **Authorised** 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.

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

Purchase Order ID: 0

Category: None

Default Donor: Entered by: Sussol

Store: General

New line Delete line

General Summary by Item Summary by Batch Price Log

...	Lo...	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

Item(s):

Amount: 0.00000

Subtotal: 200.00000

0 % tax: 0.00000

Total: 200.00000

Hold Finalize Authorised

Export batch: 0

Margin: 2.00

OK & Next Delete 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>

Print 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. See below image.

- 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** to print.
- Select preview and and a report like the one below will appear.



Sames

Invoice: 9181
Page 2 of 2

Supplied to :

Nitibe/Ustaco

Nitibe, OECUSI

Status: cn

Comment : Maria Ribeiro

Confirmed: 11/12/2012

Printed: 23/05/2013

Invoice Category :

Authorized by :

Comments : 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	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 : Signature :

Checked By : Signature :

Authorised By : Signature :

Delivered By : Signature:

Received 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.

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Previous: [currencies](#) Next: [keyboard shortcuts](#)

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