# **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.

	Edit user
User Sussol General Permission	ns Permissions (2) Permissions (3) Log-on modes Details
Document management	Virtual Stores
Document management         Tenders         Image: Upload document         Image: Docuc	Virtual stores         ✓ Create new stores         Edit store details         ✓ tott visibility 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	
<ul> <li>Sort available batches by VVM Status rath</li> <li>Patients created in this store not visible in</li> <li>Names created in this store not visible in</li> <li>Allow users to enter total quantities to dis</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 curr</li> </ul>	General Preferences er than Expiry o other store other stores stribute	ore Logo   Visibil	ity 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
<ul> <li>Names created in this store not visible in</li> <li>Allow users to enter total quantities to dis</li> <li>Round up the distributed quantity</li> <li>Able to pack items into multiple boxes</li> </ul>	other stores tribute ency voice lines	2	Custom field label 2 Custom field 2 Use custom field 3 Custom field label 3 Custom field 3
• Finalised	On hold		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.

00				S	upplier i	nvoice				
Name Ab Their ref Comment	bbot Laboratories (sing	apore PTE.LTD SNG102				y date : 22/05 n date : 22/05			Colour : Invoice number : 2,010 Status : cn pods receive ID : 0	_
New line	Delete line	General	( Summa	Default		ione nmary by Batc	¢	Pur	chase Order ID : 0 Entered by : Susso Store : Gener	
Lo	Item Name avir 300 mg		Qty 10	Pack	Batch	Expiry 01/01/2016	Cost Price	Sell Price 20.40000		00.00000
<u>s</u> .	Other ch. Item Amou	(s):	00						Subtotal: 0 % tax: Total:	200.0000 0.0000 200.0000
) Hold ) Finalize ) Authorised	Export batch: 0 Margin: 2						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>

#### 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.

Supplied to :         Stat           Stat           Nitibe/Ustaco         Comment :         Stat           Nitibe/Ustaco         Comment :         Stat           Nitibe/Ustaco         Comment :         Comment :         Comment :         Stat           Nitibe/Ustaco         Comment :         Comment :         Comment :         Stat           Invoice Category :         Authorized by :         Printed: 23/05           Comment :         Maria Ribeiro         Collected by :           Comment :         Maria Ribeiro         Collected by :         Printed: 23/05           Comment :         Maria Ribeiro         Collected by :         Collected by :           Colsected by :         Printed: 23/05           Colsected 0.66x 25 mm 2,5ml         100         1         none         Colsected by :           Colsected Pi G x 1.1/2 (box/100) 0.7 x 25 mm         100         00/00/00/00         0.00/00/00 <th></th> <th>P</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>		P							
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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		Customer invoice [Read Only]			
Name	- 1	Confirm date 23/05/2013		Colour : Bla	ck
Their ref	DILI-099-1			Invoice : 9,259	
Comment		Category None	: 6	Entry date : 23/05/2013	
comment	1			Goods receive ID : 0	
				Status : fn	
				Entered by :	
				Store : General	
	General Summ	ary by Item Summary by Batch Transport d	etails Log		
Date 23/05/2013	Time Us 11:11:01	er 2 Customer invoice is authorised.	Event		
23/05/2013	11:10:24	2 Customer invoice is authorised. 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			
23/03/2013	11.09.30	2 Customer invoice 9239			
		OK	Next D	Velete OK	E
					-

Previous: Foreign currency transaction Next: Miscellaneous labels

