

## Authorisation

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



While invoices can be edited after authorisation, once authorised, 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, it means that they cannot be confirmed until they have been authorised i.e. invoices without authorisation are held at status 'sg' or suggested. This means the official invoice can not be printed (and goods taken out of or receipted into stock) until the invoice has been authorised.

## Configure mSupply for Authorisation

You can set the authorisation of customer and supplier invoices and Goods Receipt Lines independently. You do it by setting the store preferences to make authorisation compulsory:

- Click on the **Special> Show stores..** menu item, click the **Preferences** tab. Now check the appropriate boxes as required. This is shown on the following screenshot:

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

- Finally, click on the OK button to close the window and save the preferences. From now on, the invoice types you set the preferences for must be authorised before being confirmed.

## Supplier Invoice authorisation

With the *Supplier invoices must be authorised* store preference set, your newly created supplier invoices will look like this:

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 Entered by: Sussol

Default Donor: 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 Export batch: 0

☐ Finalize Margin: 2.00

☐ Authorised

OK & Next Delete OK

Notice the **Authorised** checkbox at the bottom left of the window. If you click the **OK** button with this checkbox unchecked, you will get a warning message telling you that unconfirmed invoices cannot be confirmed and nothing will happen. If you have the permission set to allow you to authorise invoices (see [here](#) for details) then you can click on the **Authorise** checkbox and continue. However, if you do not have the permission set, the **Authorised** checkbox will be disabled and you cannot authorise the invoice. Another user who has the permission must check the box for you before you can proceed.

## Unauthorising Supplier invoices and inventory additions

If you have permission to authorise an invoice, you can also unauthorise it. If the invoice has status "NW" then it has not been entered into stock, and you can allow users to edit it and you will still control the process of authorisation before the goods are put into stock. *However*, if the invoice is already confirmed, the goods have already been entered into stock, and 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 then delete the whole invoice) and require users to enter a new invoice to receive the stock, and the normal authorisation process will apply to the new invoice.

## Customer Invoice authorisation

With the *Customer invoices must be authorised* store preference set, newly created customer invoices will look like this:

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

Again, notice the *Authorised* checkbox at the bottom left of the window. This behaves exactly the same as the *Authorised* checkbox on the bottom left of a supplier invoice: the customer invoice cannot be confirmed until this checkbox is saved as checked. And, once again, if you do not have the *Can authorise invoices* permission set, it will be disabled and you will be unable to authorise the invoice; someone else, with the permission set, must do it for you.

## Printing invoices which must be authorised

When an invoice is not authorised an attempt to print it will produce an invoice with an 'Unauthorised' watermark, just like this:



**Sames**

**Invoice: 9181**  
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Supplied to :  
Ntibe/Ustaco  
Ntibe, OECUSI

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

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Invoice Category :  
Comments : Maria Ribeiro

Authorized by :  
Collected by :

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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	
<b>Total: 647.68000</b>								

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Prepared By :                      Signature :                      Delivered By :                      Signature:

Checked By :                      Signature :                      Received By :                      Signature:

Authorised By :                      Signature :

As soon as the invoice is authorised it will print normally without the unauthorised watermark.

## Purchase Order Authorisation

Purchase Orders can also be authorised - refer to [Authorising Purchase Orders](#).

## 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, as shown in the screenshot below.

