22.16. 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:
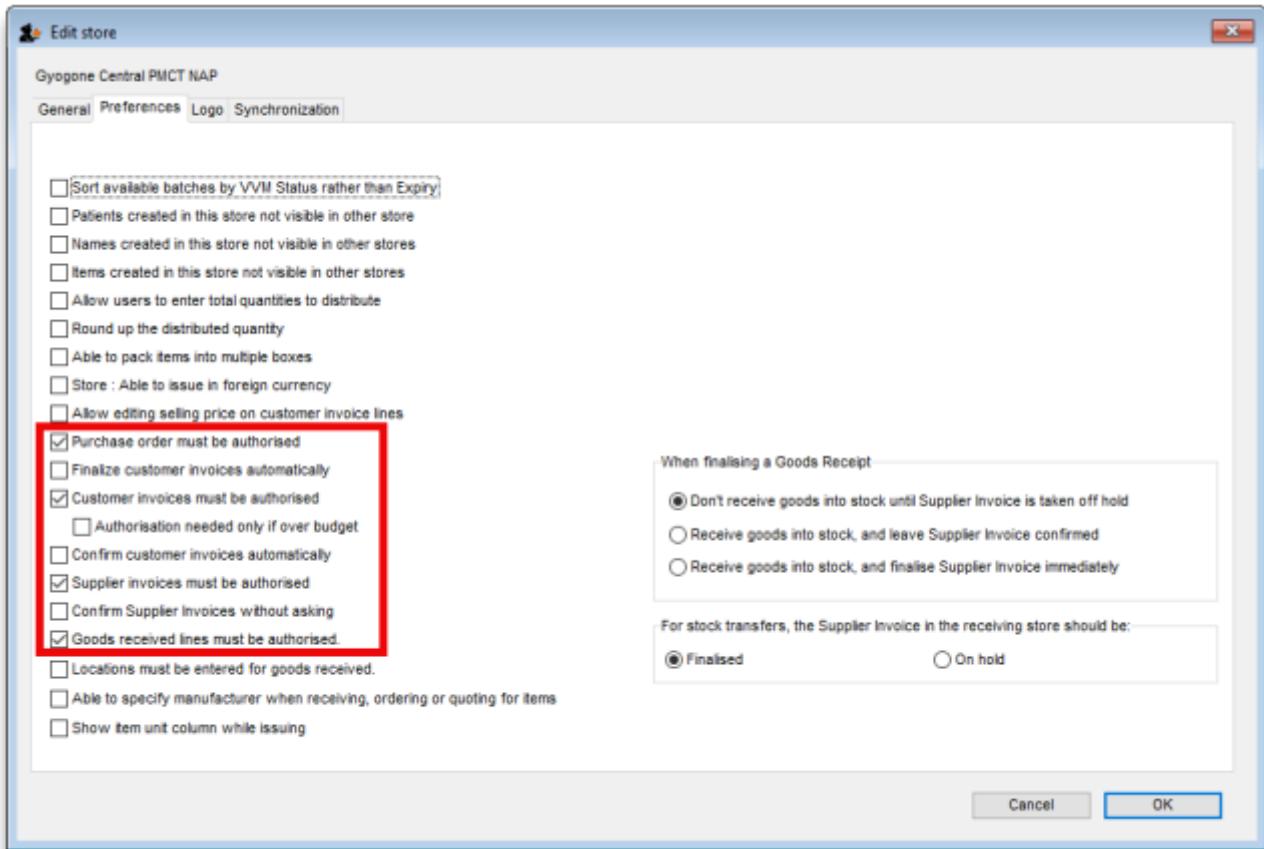
- Finally, click on the *OK* button to close the window and save the preferences. From now on, the invoice types you set the preferences for must be authorised before being confirmed.

Supplier Invoice authorisation

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

Notice the **Authorised** checkbox at the bottom left of the window. If you click the *OK* button 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:

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:

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.

You can also view all logs from **Special > View log...**. See here for details.

Previous: *Foreign currency transactions* *Next:* *Miscellaneous labels*

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