22.16. Authorisation

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

Authorisation can be set according to local needs for:

- Customer invoices
- Supplier invoices
- Goods receipt
- Purchase orders

Authorisation can either occur within mSupply or externally using the mSupply web authorisation system (see **Remote authorisation**).

Invoices can be edited after authorisation but **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, they **cannot be confirmed until they are authorised**. Until then:

- Unauthorised invoices are held at suggested (sg) status
- The official invoice cannot be printed
- Goods are not removed from or received into stock

Configuring mSupply for authorisation

Turning on authorisation

Authorisation must be set up for **each store independently**. For each store, you can decide which transaction types require authorisation.

- 1. Click the **Special** tab, then click **Stores**.
- 2. Double click the store to edit.
- 3. Click the **Preferences** tab.



4. Check the boxes to set compulsory authorisation for specific transaction types at that store.

5. Click **OK**.

🗶 Edit store		×
Gyogone Central PMCT NAP		
General Preferences Logo Synchronization		
General revelected by Cold Synchronization Sort available batches by VVM Status rather than Expiry Sort available batches by VVM Status rather than Expiry Patients created in this store not visible in other stores 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 : Able to issue in foreign currency Allow editing selling price on customer invoice lines Purchase order must be authorised Finalize customer invoices automatically Confirm customer invoices must be authorised Authorisation needed only if over budget Confirm Supplier invoices must be authorised Confirm Supplier invoices must be authorised Confirm Supplier Invoices without asking Goods received lines must be authorised. Able to specify manufacturer when receiving, ordering or Show item unit column while issuing	When finalising a Goods Receipt	
	Cancel OK	

From now on, the transaction types you set the preferences for must be authorised before being confirmed.

Setting up authorisers

To use the authorisation module, certain users must be designated as **Authorisers** for each store and transaction type requiring authorisation.

Give the user permission to be an authoriser:

1. Click the **Admin** tab, then click **Edit Users**. Double click on the user to edit.

2. Go to the **Permissions** tab and the **Permissions (2)** tab and check the boxes that give the user permission to authorise specific transaction types.

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User Alba		Store: General Warehouse
General Permissions Pe	rmissions (2) Permissions (3)	Login rights Details
Names	Invoices	Invoices
Create customer, supplier & manufacturer names	Create customer invoices	Authorise customer invoices
View customer, supplier & manufacturer names	View customer invoices	Authorise supplier invoices
-	Edit customer invoices	
Edit customer, supplier & manufacturer names	 Create supplier invoices View supplier invoices 	Builds and bill of materials
Delete names	 View supplier invoices Edit supplier invoices 	 View cost prices on builds Finalise builds
Edit name codes	Edit comments on finalised invoices	
Edit name charge code	Import supplier invoices	Edit bill of materials
Merge names	Duplicate supplier & customer inv	voices 🛛 Build items
Edit name categories	Finalise multiple invoices	Edit build items
Create & edit patient events	Finalise customer invoices	
Add patients	Finalise supplier invoices	Cash transactions
Edit patient details	Finalise repacks	Make cash payments
Add and edit insurance policies	Finalise inventory adjustments	Receive cash
		🗹 Edit payment note field
Add / edit name groups	Cancel finalised invoices	
✓ Update master code	Change transportation dates on f invoice	Inalised Transfers
Web interface	🗹 Edit user fields on finalised invoid	es V Transfer goods between stores
✓ Edit web passwords	Customer stock takes: show inter	Finalise stock transfers
Edit and create web messages	 Customer stock takes: show inter analysis columns by default 	
Reports	Change invoice category on finali	ised Printing
Manage reports	invoice Create cash transactions	Print duplicate packing slips
Revert reports to original		Print duplicate customer invoices
View reports		
		Delete Cancel OK
All on Copy Paste		Delete Cancel OK

3. Click **OK** until you return to the navigator home page.

Allocate authorisers to tasks:

- 4. Click on **Special > Show Authorisers**.
- 5. Click the **Plus** button in the **Store** column.

• •		Au	thorisers						
Store	Record Type \pm 📻	Sub Type 📑 💻				Authorisers			•
			Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name

6. Choose the store to allocate authorisers to and click **OK**.

7. Select the store from the list, then click the **Plus** button in the **Record Type** column.

• • •		Au	thorisers						
Store 🖶 📻	Record Type 💽 🚍	Sub Type 📑 💻				Authorisers			•
Central Medical Store			Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name

8. Choose the type of transaction to allocate authorisers. Select from Customer Invoices, Supplier Invoices, Request Requisitions or Response Requisitions and click **OK**.

9. Select the record type from the list, then click **Default** to allow authorisation for all sub types. Alternatively, click the **Plus** button in the **Sub Type** column to create further specifications (e.g. if certain users can authorise customer invoices for some facilities only).

• • •			Authorisers						
Store 뵭 📻	Record Type 🛖 📻	Sub Type 📑 💻)			Authorisers			•
Central Medical Store	Customer Invoice	default	Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name

10. In the **Authorisers** section, click the **Plus** button to add authorisers for that specific transaction type (and sub type) in that specific store. You will only be able to allocate users that have permission to be authorisers (steps 1 - 3).

• • •			Au	thorisers						
Store 🔶	Record Type 🜸 💻	Sub Type 🛃 🛛	-				Authorisers			•
Central Medical Store	Customer Invoice	default		Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name
				Alba	1		Yes 🗘	3		
										_

Supplier invoice authorisation

14:51

When the Supplier invoices must be authorised store preference is set, new supplier invoices will contain an Authorised checkbox.

An authoriser must check the **Authorised** box before the supplier invoice can be confirmed.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is unchecked, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.

00	Supplier invoice	
Name Abbot Laboratories (singapore PTE.LTI Their ref SNG102 Comment New line Delete line	Confirm date : 22/05/2013 Invoice number : Status : Category None Purchase Order ID : Default Donor: Entered by :	cn 0 0
Lo Item Name	Qty Pack Batch Expiry Cost Price Sell Price Price ext	tension
	Image: sector of the sector	
Other charges Item(s): Amount: 0.	Subtotal 0 % tax: Total	0.0000
Hold Export batch: 0 Finalize Margin: 2.00 Authorised	OK & Next Delete	ок о

If you have permission to authorise a supplier invoice, you can also **unauthorise** it.

- If the invoice has a **new (nw)** status then it has not been entered into stock. If you unauthorise it, users can edit it and and you will still control the process of authorisation before the goods are entered into stock.
- However, if the invoice is confirmed (cn), the goods have already been entered into stock. If you unauthorise it, 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 delete the whole invoice) and require users to enter a new invoice to receive the stock. The normal authorisation process will then apply to the new invoice.

Customer invoice authorisation

When the **Customer invoices must be authorised** is set, new customer invoices will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the customer invoice can be confirmed.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is *unchecked*, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.

Their ref	nao/Remexio CHC	AlL-403-2		onfirm date				Colour :	
Comment		General Summar	Backorders		None Mistor Batch	· · · · · · · · · · · · · · · · · · ·	tails Log -	Entry date : 23, Goods receive ID : 0 Status : cn Entered by : Sus Store : Ger	ssol
L Location		m Name	Quan	Pack Size	Batch	Free date	Sell Price	Price exten	
	Acces Pin With Stopp	er for use IV.Inj. site					0.61148		1.22296
Hold	Export batch: 0	Other cha	rges item:					Amount: Subtotal: 0 % tax: Total:	0.0000 1.2229 0.0000 1.2200

Goods receipt authorisation

When the **Goods received lines must be authorised** store preference is set, each new goods receipt line will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the goods receipt can be confirmed. They may also leave an **Authorisation comment** for each line.

• The **Authorised** box will be disabled for users without permission to authorise.



Purchase order authorisation

When the **Purchase order must be authorised** store preference is set, new purchase orders will contain an **Authorised** checkbox.

An unauthorised purchase order **can** still be confirmed and have goods receipted against it so it is not as restrictive as, for example, a customer invoice or supplier invoice.

Last update: 2019/11/05 14:51	other_stuff:invoice_authorization https://docs.msupply.org.nz/other_stuff:invoice_authorization?rev=1572965507
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	Order num	: 2	Name											llack
0	onfirm date	: 00/00/00							Refe	erence			Status sg	
leque	sted delivery	01/06/2017											Store: Ge	neral
			General Det	ails	Ad hoc	items	Goods	Received	Supplier inv	oices Log	Location]		
New		ete lines	Update EDD	info		Print		√ ≥nfirm		Catego	ory none		0	
show	all lines	0							Cur	rency USD	0	Forex rate	1	
ine	item code		ltem	0	rig.Qty	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Expected	Store:
														_
				-										
	Supplier	discount									Esti	imated subtor	al	0.00
S	Percent	age	Discount am	ount		0	.00			E		t after discou		0.00
	Locked		Auto calc	usage										
0.	inalise order		Authorise							OK & Next	10	Delete	_	ж

However, an unauthorised purchase order will print with an **Unauthorised** watermark across it. An authorised purchase order will print without the watermark.

Monitoring authorisations

Printing unauthorised invoices

When an invoice is **not** authorised, it will print with a clear **Unauthorised** watermark. Authorised invoices will print without the watermark.

							Page 2 of 2
upplied to :							Status: cn
itibe/Ustaco						Comment : Ma	ria Ribeiro
itibe, OECUSSI						Confirmed: 1	1/12/2012
						Printed: 2	3/05/2013
woice Category :					A	uthorized by :	
omments : Maria Rib	eiro		(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	
	5 ml, w/needie 0.7x30 mm 5ml	100	1 4204003	31/12/16	0.00	0.61	
	19 G x 1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
	21 G x 1.1/2 (box/100) 0.7 x 25 mm	100		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	
					те	otal: 647.68000	
				_			
Prepared By :	Signature :	Delivered By :	Signature:				
Prepared by .	ograture .	Derivered by .	orginature.				
Checked By :	Signature :	Received By :	Signature:				
Authorised By :	Signature :						
				_			

Viewing authorisation logs

mSupply records the authorisation and unauthorisation of invoices and creates a record every time the authorisation status of an invoice changes.

To view the records, click the **Log** tab of an invoice.

00		Customer invoice [Read Only]		
Name	- 1	Confirm date 23/05/2013		Colour : Black
Their ref	DILI-099-1			Invoice : 9,259
Comment		Category None	÷ 🔒	Entry date : 23/05/2013
				Goods receive ID : 0
				Status : fn
				Entered by :
				Store : General
	General Summ	ary by Item Summary by Batch Transport det	ails Log	prove - perice p
Date	Time Use		Event	
23/05/2013	11:11:01	2 Customer invoice is authorised.		
23/05/2013	11:10:24	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		
		OK & N	lext I	Delete OK 🛛 🕉

Advanced users can also view all logs by going to **Special > View log...**

Previous: 22.15. Using the mSupply remote client | | Next: 22.17. Remote authorisation

