26.14. Authorisation

Sometimes it is important that certain critical processes are not carried out until they have been **authorised**. mSupply allows authorisation to be set according to local needs for:

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

Response Requisitions can be authorised using the remote authurisation app. See the 26.15. Remote authorisation page for details about that.

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.

To do this, choose *Special* > *Show stores* from the menus, double-click on the store you are logged into and click on the *Preferences* tab. Now turn on the authorisation preferences for the transactions you want to be authorised. See the 26.08. Virtual stores page for details on which preferences do what. lick the **Special** tab, then click **Stores**.

Setting up authorisers

Certain users must be designated as authorisers for each store by giving them permissions to authorise different transaction types.

To do this, *File > Edit users* from the menus and double-click on the user (or change the **Show** drop down list to *Group* and double-click on the group of users) you want to designate as an authoriser and give them the *Authorise purchase orders*, *Authorise goods received*, *Authorise customer invoices* or *Authroise supplier invoices* permissions in the appropriate stores.

See the 25.15. Managing users page for details on where to find these permissions.

Supplier invoice authorisation

When the *Supplier invoices must be authorised* store preference is set, new supplier invoices will show an **Authorised** checkbox:

Name Abbot Laboratories (singapore PTE.LTD Their ref SNG102 Comment New line Delete line General		Default	Confirm Itegory N Donor:	one date : 22/05	\$	Pu	Colour : Invoice number : 2,01 Status : cn Goods receive ID : 0 rchase Order ID : 0 Entered by : Suss Store : Gene	al
Lo Item Name Lo Abacavir 300 mg	Qty 10			Expiry 01/01/2016				on 200.00000
Other charges Conterminisity Conterminisity	0000]				DK & Next	Dele	Subtotal: 0 % tax: Total: ete OK	200.00000

An authoriser must check the **Authorised** checkbox before the supplier invoice can be confirmed (it will be disabled for users who do not have the *Authorise supplier invoices* permission).

If the **OK** button is clicked while the **Authorised** box is unchecked, a warning message will appear telling you that unauthorised invoices cannot be confirmed and nothing will happen.

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.
- If the invoice is confirmed (*cn*), the goods have already been entered into stock. If you unauthorise it, users will be able to edit it again and any changes users make will affect stock levels immediately. It is good practice, therefore, to only unauthorise a confirmed invoice to make changes immediately and the reauthorise it straightaway.

When supplier 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 received into stock.

Customer invoice authorisation

When the *Customer invoices must be authorised* store preference is set, new customer invoices will show an **Authorised** checkbox:

Name Acun	nao/Remexio CHC	Confirm da	te 23/05/2	013		Colour :	Black	
Their ref	AJL-403-2	Catego	ry None		\$		23/05/2013	
New line	Delete line(s) General Summ	Backorders	History By Batch		tails Log -	Goods receive ID : Status : Entered by : Store :	cn	
L Location	Item Name	Quan Pack Si		Exp date		Price exte		
	Acces Pin With Stopper for use IV.inj. site	2	1		0.61148		1.22296	
	Other ch	arges item:				Amount Subtotal: 0 % tax: Total:	0.0000 1.2229 0.0000 1.2200	

An authoriser must check the **Authorised** checkbox before the customer invoice can be confirmed. The **Authorised** checkbox will be disabled for users without permission to authorise.

If the **OK** button is clicked while the **Authorised** checkbox is unchecked, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.

When customer 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 stock.

Goods receipt authorisation

When the *Goods received lines must be authorised* store preference is set, a new Authorised column will be displayed and will contain a checkbox for each goods receipt line. It looks like this:

	F	Cold mode to						Store -	Seneral Warehouse
		Gold medical s	Tender reference					Goods receiv	
		05/11/19	Tender reference						ted by : Admin
	r reference Comment			I					ied by :
	Comment			•				Entr	y date : 05/11/19
									order: 12
								Supplier In	nvoice: 0 Status: nw
									status : nw
			-		-	-			
Add f	from purcha	se order A	dd an un-ordered item	Delete line	<u> </u>	int goods receipt			
Line	Location	Item code aci250t	Aciclovir sodium 250		Batch HYE778	Exp date 31/5/25	Pack Size	Quan 20	Authorised
1		d(12.30)	ACICIOVIT SOUTUITI 230	ning =0	HTE//6	31/3/23	10	20	
Authori	isation comm	ment							

Users who have the *Authorise goods received* permission turned on can check the *Authorised* checkbox for each line that is authorised. When the goods received note is finalised, only lines that are authorised will be added to the supplier invoice to be received into stock. The unauthorised lines will remain on the finalised goods received note as a permanent record of what was actually received but not authorised.

Any unauthorised goods received note lines do not count towards stock received against purchase orders or on goods received notes so they can be received again at a later date if they are resent by your supplier.

Users who have the *Authorise goods received* permission turned on may also leave a comment in the **Authorisation comment** field to record anything that needs to be noted.



Invoices can be edited after authorisation but **goods receipt lines cannot be unauthorised** to fix mistakes! Any authorising errors can only be fixed using stock adjustments.

Purchase order authorisation

When the *Purchase orders must be authorised* store preference is set, new purchase orders will show an **Authorised** checkbox:

•	•				N	lew pure	chase orde	er					
	Order num	: 2	Nam	e									llack
0	Confirm date	: 00/00/00						Ref	erence			Status sg	
Reque	ested delivery	01/06/2017										Store: Ge	neral
			General D	etails Ad ho	c items	Goods	Received	Supplier inv	oices Log	Location			
•		-	3	1	-		\checkmark						
New	line Del	ete lines	Update EDD	Info	Print	t C	onfirm		Categ	ory none		٢	
show	all lines	0						Cur	rency USD	٥	Forex rate	1	
Line	Item code		Item	Orig.Qt	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Expected	Store:
	Supplier	discount								Fe	imated subto	tal	0.00
S	Percent	age	0 Discount ar	nount	(0.00			1		st after discou		0.00
	Locked		Auto cak	usage									
-													
	Finalise order		Authorise						OK & Next		Delete	0	ж

- An unauthorised purchase order can still be confirmed and have goods receipted against it so it is not as restrictive as authorisation on customer or supplier invoices.
- 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.

reading 1	s/						Invoice:	
							,	Page 2 of 2
upplied t	: 0							Status: cn
itibe/Ust	aco						Comment : Ma	ria Ribeiro
itibe, OE	CUSSI						Confirmed: 1	1/12/2012
							Printed: 2	3/05/2013
woice Ca	ategory :					А	uthorized by :	
omment	-	Maria Ribeiro			\sim		Collected by :	
	Item		Quan	Pack Batch	Expiry	Price	Extension	Box
		isposable 2.5 ml w/needle 0.6x 25 mm 2,5ml	100	1 none	00/00/00	0.00	0.00	
25		isposable 5 ml, w/needie 0.7x30 mm 5ml	100	1 4204003	31/12/16	0.00	0.61	
26		e Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
27	Disposab	e Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100		00/00/00	0.01	1.00	
28	Disposab	e Needle 23 G x 1.1/4 0.65 x 32mm	100	1	00/00/00	0.01	1.00	
			1.1	×		Т	tal: 647.68000	
Prepare	d By :	Signature :	Delivered By :	Signature:				
Checke	d Bu :	Signature :	Received By :	Signature:				
CHECKE	u by .	olgialare.	Necewer by .	ognatore.				
Authoris	ed 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		Custo	mer invoice [Read Only]			
Name	-	II.	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 :	
							General
	General	Summary by Item	Summary by B	atch Transport de	tails Log	store .	General
Date	Time	User			Event		_
23/05/2013	11:11:01		Customer invoice				
23/05/2013	11:10:24			e is un-authorised.			
23/05/2013	11:09:49		Customer invoice				
23/05/2013	11:09:39		Customer invoice				
23/05/2013	11:09:30	2	Customer invoice	9259			
				OK &	Next C	Delete	OK 🛛

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

Previous: 26.13. Using the mSupply remote client | | Next: 26.15. Remote authorisation

