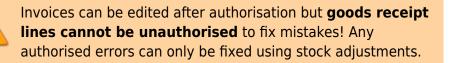
25.17. Authorisation

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
- Supplier invoices
- Customer invoices

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



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**.

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1 Edit store	
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 must be authorised Confirm customer invoices automatically Supplier invoices must be authorised	When finalising a Goods Receipt On'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 leave Supplier Invoice immediately
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	For stock transfers, the Supplier Invoice in the receiving store should be:
	Cancel OK

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

Setting up authorisers

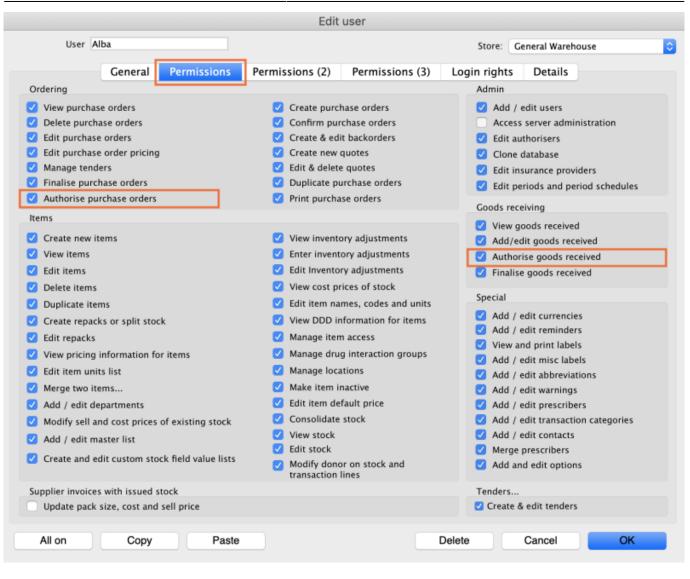
To use the authorisation module, certain users must be designated as **Authorisers** for each store and transaction type requiring authorisation.

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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				Edit	user				
User A	lba					Ste	ore:	General Wareh	ouse
	General	Permissions	Perm	issions (2)	Permissions (3)	Login r	ights	Details	
Names				Invoices			Inv	oices	
Create custo names	mer, supplier	& manufacturer			omer invoices				tomer invoices
	er, supplier &	manufacturer nam	es	_	mer invoices ner invoices			Authorise su	oplier invoices
Edit custome	er, supplier &	manufacturer name	s		plier invoices		Bui	lds and bill of	materials
				View suppli	ier invoices			View cost pri	ces on builds
Delete name	-			Edit supplie	er invoices			Finalise build	
Edit name co	des			Edit comme	ents on finalised invoice	es		View bill of n	
🗹 Edit name ch	arge code			🗹 Import sup	plier invoices			Edit bill of m	aterials
🕗 Merge name	s			🗹 Duplicate s	upplier & customer inv	oices		Build items	
🗹 Edit name ca	tegories			🗹 Finalise mu	ltiple invoices		_	Edit build ite	ms
🗹 Create & edit	t patient even	ts		Finalise cus	tomer invoices				
Add patients				🗹 Finalise sup	oplier invoices		Cas	sh transaction	s
Edit patient of the second	letails			🗹 Finalise rep	acks			Make cash pa	ayments
_	insurance po	licies		🗹 Finalise inv	entory adjustments			Receive cash	
_		licies		_				Edit payment	note field
Add / edit na	ame groups				lised invoices				
Update mast	er code			 Change tra invoice 	nsportation dates on fi	nalised	Tra	nsfers	
Web interface				🗹 Edit user fi	elds on finalised invoice	es		Transfer goo	ds between stores
 Edit web pas Edit and crea 	swords ite web messa	ges			stock takes: show inter lumns by default	nal		Finalise stock	transfers
Reports		-		_	oice category on finalis	sed	Prir	nting	
🗹 Manage repo	rts			_	n transactions			Print duplicat	e packing slips
Revert report	s to original			Create casi	rtiansactions			Print duplicat	e customer invoice
View reports									
						Doloto		Cancol	OK
All on	Copy	Paste				Delete		Cancel	ОК

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

Allocate authorisers to tasks: (You only need to carry out these steps if you are using remote authorisation - see the 26.15. Remote authorisation section for details).

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

0.		Au	thorisers						
Store 🛃 🚍	Record Type 🜸 💻	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).

		A	uthorisers						
Store 🛖 🖡	Record Type 🛖 📒	Sub Type 📥 💻				Authorisers			•
ntral 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).

• • •		Aut	horisers						
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	Image: A start and a start	

Supplier invoice authorisation

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	Si	upplier invoice				
Name Abbot Laboratories (singapore PTE.LTD Their ref SNG102 Comment New line Delete line Ceneral	Default	Entry date : 22/0 Confirm date : 22/0 tegory None Donor: em Summary by Bat	\$	Good Purcha	Colour : pice number : 2,0 Status : cn Is receive ID : 0 use Order ID : 0 Entered by : Sus Store : Gen	10 sol
Lo Item Name	Qty Pack	Batch Expiry	Cost Price	Sell Price	Price extensi	on
Other charges Item(s): Amount: 0.000	200]				Subtotal: 0 % tax: Total:	200.00000 0.00000 200.00000
Hold Export batch: 0 Finalize Margin: 2.00			OK & Next	Delete	ОК	

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	AlL-403-2					Invoice : 9,25	2
Comment ew line	Delete line(s)	Catego Backorders ry by Item Summary	ry None Histo by Batch	·	tails Log)-	Entry date : 23/6 Goods receive ID : 0 Status : cn Entered by : Suss Store : Gen	ol
L. Location	Item Name	Quan Pack Si	ze Batch	Exe date	Sell Price	Price exten	
	Acces Pin With Stopper for use IV.Inj. site	2			0.61148		1.22296
	Other cha	irges item:	_			Amount: Subtotal: 0 % tax: Total:	0.0000 1.2229 0.0000 1.2200

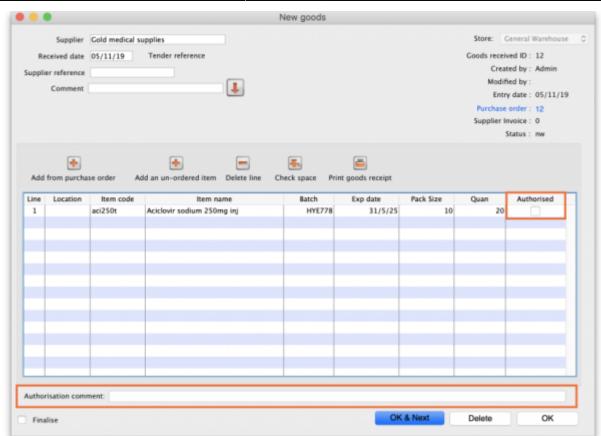
Goods receipt authorisation

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 click on a line and leave an **Authorisation comment** for individual items.

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





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Purchase order authorisation

2025/08/12 10:35

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.

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	Order num	: 2	Name										llack
0	onfirm date	: 00/00/00						Ref	erence			Status sg	
leque	sted delivery	01/06/2017										Store: Ge	neral
			General Detail	s Ad hor	c items	Goods	Received	Supplier inv	oices Log	Location			
New I	-	ete lines		info	Print	, ,	v		Categ	ory none		0	
	all lines	<u>.</u>	opulie coo					Cur	rency USD	0	Forex rate	_	
ine	item code		Item	Orig.Qty	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Expected	Store:
S	Supplier	discount age (Discount amou	nt	(.00				Esti Estimated cost	mated subtor		0.00
	Locked		Auto calc us										
	inalise order		Authorise						OK & Next		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.

oplied to :							Status: cn
be/Ustaco						Comment : Ma	ria Ribeiro
be, OECUSSI						Confirmed: 1	1/12/2012
						Printed: 2	3/05/2013
oice Category :					A	uthorized by :	
mments : Maria Ribe	siro		0			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 (bax/100) 0.7 x 25 mm	100		00/00/00	0.01	1.00	
28 Disposable Needle 2	23 G x 1.1/4 0.65 x 32mm	100	- 1	00/00/00	0.01	1.00	
					Те	otal: 647.68000	
				-			
repared By :	Signature :	Delivered By :	Signature:				
hecked By :	Signature :	Received By :	Signature:				
necked by :	agnature :	Neceived by :	oignaiure.				
uthorised 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		L	Confirm date 23/05/2013		Colour :	Black
Their ref	DILI-099-1				Invoice :	9,259
Comment		I.	Category None	: @	Entry date :	23/05/2013
					Goods receive ID :	0
					Status :	fn
					Entered by :	
						General
	General	Summary by Item	Summary by Batch Transport	details Log	store :	General
Date	Time	User		Event		
23/05/2013	11:11:01	2	Customer invoice is authorised.			
23/05/2013	11:10:24		Customer invoice is un-authorised.			
23/05/2013	11:09:49		Customer invoice			
23/05/2013	11:09:39		Customer invoice is authorised.			
23/05/2013	11:09:30	2	Customer invoice 9259			
			04	& Next D	Delete	ок 🗌 🗆 🤅

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

