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# 26.15. 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

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



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.

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.

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

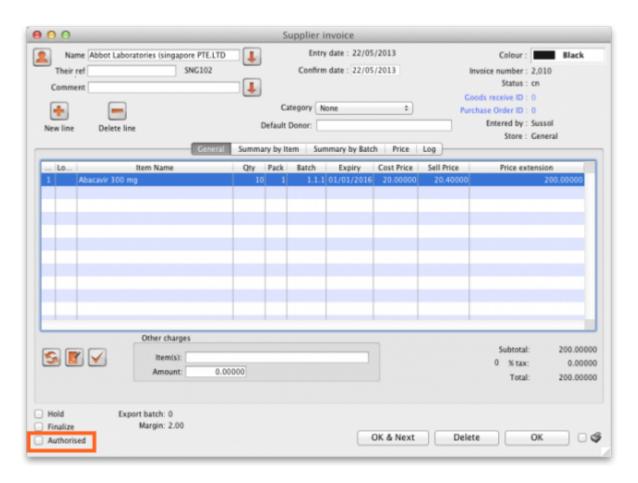
authorise different transaction types.

To do this, choose to *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:



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.

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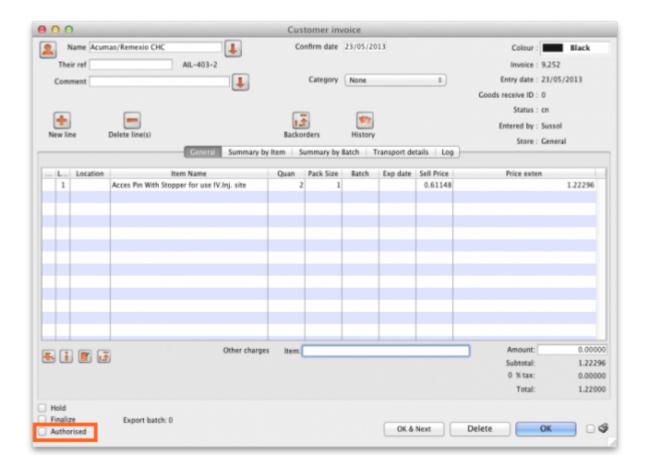
• If the invoice is confirmed (*cn*), the goods have already been entered into stock. If you unauthorise it, users will be able to edit it again and any changes users make will affect stock levels immediately. It is good practice, therefore, to only unauthorise a confirmed invoice to make changes immediately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

### **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.

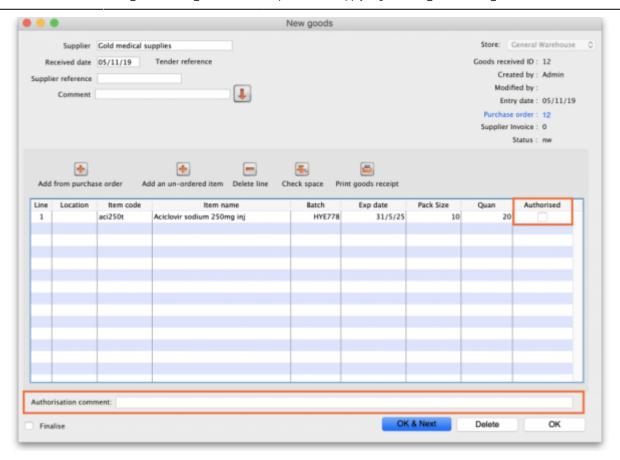
- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is *unchecked*, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.



### **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:

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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.

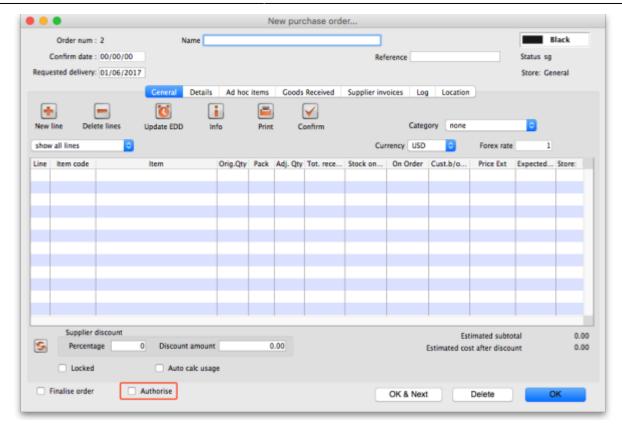
Users who have the *Authorise goods received* permission turned on may also leave a comment in the **Authorisation comment** field to record anything that needs to be noted.

## **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.

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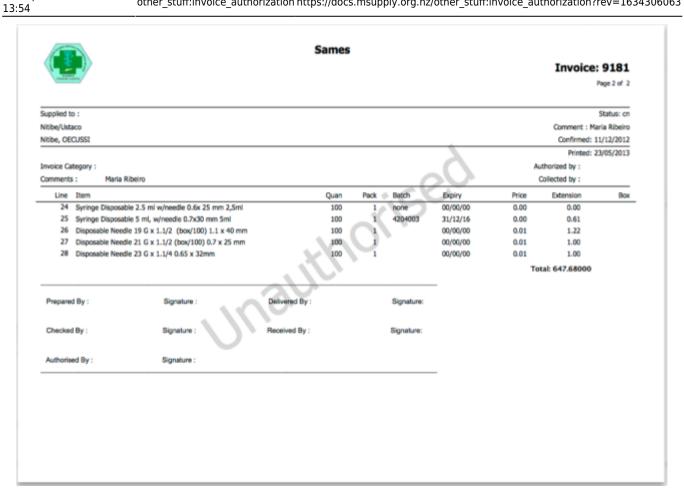
However, an unauthorised purchase order will print with an **Unauthorised** watermark across it. An authorised purchase order will print without the watermark.

# **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.

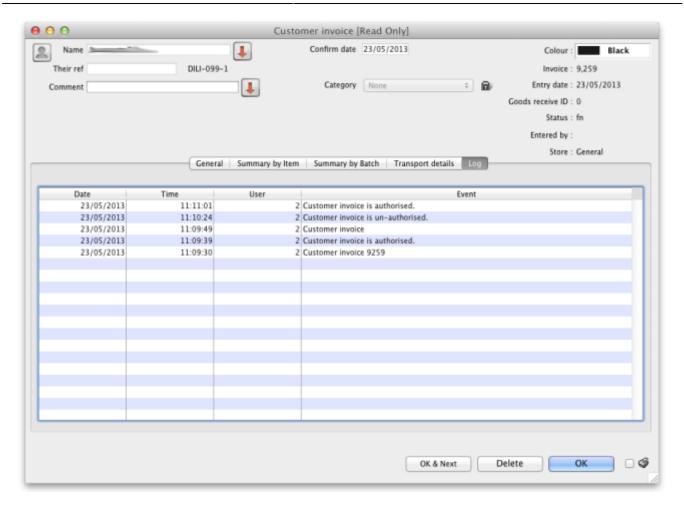
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#### Viewing authorisation logs

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.



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

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https://docs.msupply.org.nz/ - mSupply documentation wiki

Permanent link:

https://docs.msupply.org.nz/other\_stuff:invoice\_authorization?rev=1634306063

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