

## 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 authorisation 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. Click 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 *Authorise 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 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:

The screenshot shows the 'Customer invoice' window. At the bottom left, the 'Authorised' checkbox is checked and highlighted with a red rectangle. The table below shows one item:

...	L...	Location	Item Name	Qty	Pack Size	Batch	Exp date	Sell Price	Price extn
1			Acces Pin With Stopper for use IV.Inj. site	2	1			0.61148	1.22296

At the bottom right, the summary shows:

Amount:	0.00000
Subtotal:	1.22296
0 % tax:	0.00000
Total:	1.22000

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:

[illegible]

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.

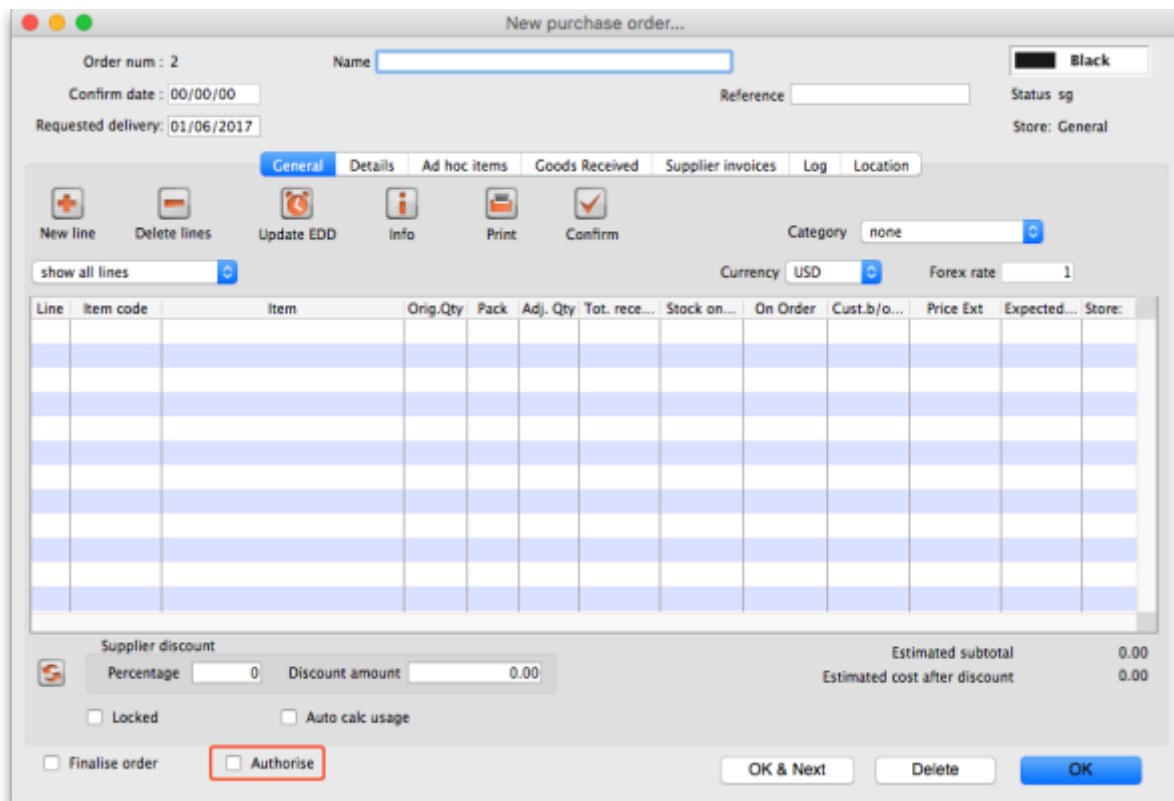
Users who have the *Authorise goods received* permission turned on may also leave a comment in the **Authorisation comment** field to record anything that needs to be noted.



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:



The screenshot shows the 'New purchase order...' window. At the top, there are fields for 'Order num : 2', 'Name', 'Confirm date : 00/00/00', 'Requested delivery: 01/06/2017', 'Reference', 'Status sg', and 'Store: General'. Below these are tabs: 'General', 'Details', 'Ad hoc items', 'Goods Received', 'Supplier invoices', 'Log', and 'Location'. The 'General' tab is active, showing icons for 'New line', 'Delete lines', 'Update EDD', 'Info', 'Print', and 'Confirm'. There are also dropdowns for 'Category' (set to 'none'), 'Currency' (set to 'USD'), and 'Forex rate' (set to '1'). A table with columns: 'Line', 'Item code', 'Item', 'Orig. Qty', 'Pack', 'Adj. Qty', 'Tot. rece...', 'Stock on...', 'On Order', 'Cust.b/o...', 'Price Ext', 'Expected...', and 'Store:' is present. At the bottom, there are fields for 'Supplier discount' (Percentage: 0, Discount amount: 0.00), 'Estimated subtotal' (0.00), and 'Estimated cost after discount' (0.00). There are checkboxes for 'Locked', 'Auto calc usage', 'Finalise order', and 'Authorise' (which is highlighted with a red box). Buttons for 'OK & Next', 'Delete', and 'OK' are at the bottom right.




- 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.



## Sames

**Invoice: 9181**

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Supplied to :

Nitibe/Ustaco

Nitibe, OECUSI

Status: cn

Comment : Maria Ribeiro

Confirmed: 11/12/2012

Printed: 23/05/2013

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Invoice Category :

Authorized by :

Comments : Maria Ribeiro

Collected by :

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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	
25	Syringe Disposable 5 ml, w/needle 0.7x30 mm 5ml	100	1	4204003	31/12/16	0.00	0.61	
26	Disposable Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100	1		00/00/00	0.01	1.22	
27	Disposable Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100	1		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	
<b>Total:</b>						<b>647.68000</b>		

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Prepared By :

Checked By :

Authorised By :

Signature :

Signature :

Signature :

Delivered By :

Received By :

Signature:

Signature:

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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.

**Customer invoice [Read Only]**

Name	[Text Field] ↓	Confirm date	23/05/2013	Colour :	Black
Their ref	DILI-099-1	Invoice :	9,259	Entry date :	23/05/2013
Comment	[Text Field] ↓	Category	None ↕	Goods receive ID :	0
				Status :	fn
				Entered by :	
				Store :	General

Date	Time	User	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 & Next   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](#)

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