Invoice Authorisation

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mSupply provides the feature of subjecting Customer and Supplier Invoices to authorisation. Authorisation may be done for a number of reasons, typically value based, and may set to be allowed by only a restricted user or set of users. <note>Invoices that are subject to authorisation and are unauthorised are held in status 'sg' or suggested status. This means the official invoice can not be printed until the invoice is authorised.</note>

Configure mSupply for Invoice Authorisation

Set Store preferences to allow for authorisation of invoices. Click drop down menu Special>
 Store.. click tab Preferences and check boxes Customer invoices must be authorised and
 Supplier invoices must be authorised. Click OK to return to the Navigator.

Ceneral Preferences Logo Visibility Custom stock field Sort available batches by VVM Status rather than Expiry Use custom field 1 Patients created in this store not visible in other store Use custom field 1 Names created in this store not visible in other stores Use custom field 2 Allow users to enter total quantities to distribute Use custom field label 2 Custom field 2 Round up the distributed quantity Use custom field 3	e o o Edit store	
 Able to pack items into multiple boxes Store mode : Able to issue in foreign currency Store mode : Able to issue in foreign currency Use custom field 4 Allow editing selling price on customer invoice lines Finalize customer invoices automatically Custom field label 4 Custom field 4 	General Preferences Logo V 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 store 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 mode : Able to issue in foreign currency Allow editing selling price on customer invoice lines Finalize customer invoices automatically Confirm customer invoices must be authorised Confirm customer invoices must be authorised	Custom stock field Use custom field 1 Custom field label 1 Custom field 1 Use custom field 2 Custom field label 2 Custom field 2 Use custom field 3 Custom field label 3 Custom field 3 Use custom field 4
	 Supplier invoices must be authorised Confirm supplier invoices without asking For stock transfers, the supplier invoice in the receiving store should be: 	Cancel OK

Create a Supplier Invoice for authorisation

From the Navigator click section Suppliers and click New Supplier Invoice. Enter your supplier and add items to the Invoice.

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Click the authorise button at the bottom left of the window.

Create a Customer Invoice for authorisation

From the Navigator click section Customers and click New Customer Invoice. Enter your customer and add items to the Invoice.

000		Supplier i	nvoice				
Name Abbot Laboratories (singapore PTE.LTD Their ref SNG102 Comment New line Delete line General		Confirm Category N	y date : 22/05 n date : 22/05 ione nmary by Batc	\$	c	Invoice number : Status : ioods receive ID : rchase Order ID : Entered by :	cn 0 0
Lo Item Name	Qty Pack	Batch	Expiry	Cost Price	Sell Price	Price ext	ension
1 Abacavir 300 mg	10 1		01/01/2016		20.40000		200.00000
Other charges Item(s): Amount: 0.00	000					Subtotal: 0 % tax: Total:	0.00000
Hold Export batch: 0 Finalize Margin: 2.00 Authorised				DK & Next	Del	ete	ок 🗌 🗇

Click the authorise button at the bottom left of the window and click OK to return to the Navigator.

<note>Log in as another user while the invoice is not authroised to show the user cant confirm the invoice.</note>

Prin an invoice with Authorisation status set

When an invoice is not authorised an attempt to print it will produce and invoice with an 'unauthorised' watermark.

- From the Navigator click section Customers and select View Customer Invoices
- Select an invoice with unset authorisation.
- In the main invoice window that appears select the **Print** check box at the bottom right and and click **OK**.

supplied to :							Status: cr
litibe/Ustaco						Comment : Ma	
litibe, OECUSSI				<u> </u>		Confirmed: 1	
						Printed: 2	3/05/2013
nvoice Category :					A	uthorized by :	
Comments : Maria Ribeiro)					Collected by :	
Line Item		Quan	Pack 🧄 Batch	Expiry	Price	Extension	Box
24 Syringe Disposable 2.5	5 ml w/needle 0.6x 25 mm 2,5ml	100	1 none	00/00/00	0.00	0.00	
	ni, w/needie 0.7x30 mm 5mi	100	1 4204003	31/12/16	0.00	0.61	
	G x 1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
	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	
					То	tal: 647.68000	
Prepared By :	Signature : Deliv	ered By :	Signature:	-			
Checked By :	Signature : Recei	ived By :	Signature:				
Authorised By :	Signature :						

NOTE: The unauthorised watermark on the background of the invoice.

View authorisation logs

When an invoice is authorised a log is created. View authorisation logs from log tab.

00		Customer invoice [Read Only]	
Name	I	Confirm date 23/05/2013	Colour : Black
Their ref	DILI-099-1		Invoice : 9,259
Comment	1	Category None	÷ Entry date : 23/05/2013
			Goods receive ID : 0
			Status : fn
			Entered by :
			Store : General
	General Summa	ry by Item Summary by Batch Transpo	
Date	Time Use	r	Event
23/05/2013	11:11:01	2 Customer invoice is authorised.	
23/05/2013	11:10:24	2 Customer invoice is un-authorised	d.
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	
		0	OK & Next Delete OK C

Previous: currencies Next: keyboard shortcuts

