

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

- First give the appropriate user the permission to manage authorisation of invoices.
- Click drop down menu **File> Edit Users...** double click the appropriate user and in the window that appears click on tab **Permissions (3)** and tick to turn on the **Edit Store Details** checkbox and click **OK**.

The screenshot shows the 'Edit user...' dialog box with the 'User' field set to 'Sussol'. The 'Permissions (3)' tab is selected, showing various permission categories. The 'Edit store details' checkbox under 'Virtual Stores' is highlighted with a red box. Other permissions include 'Document management', 'Quotes', 'Items Lines (Batches of stock)', 'Stocktake', 'Reminder', and 'Admin'.

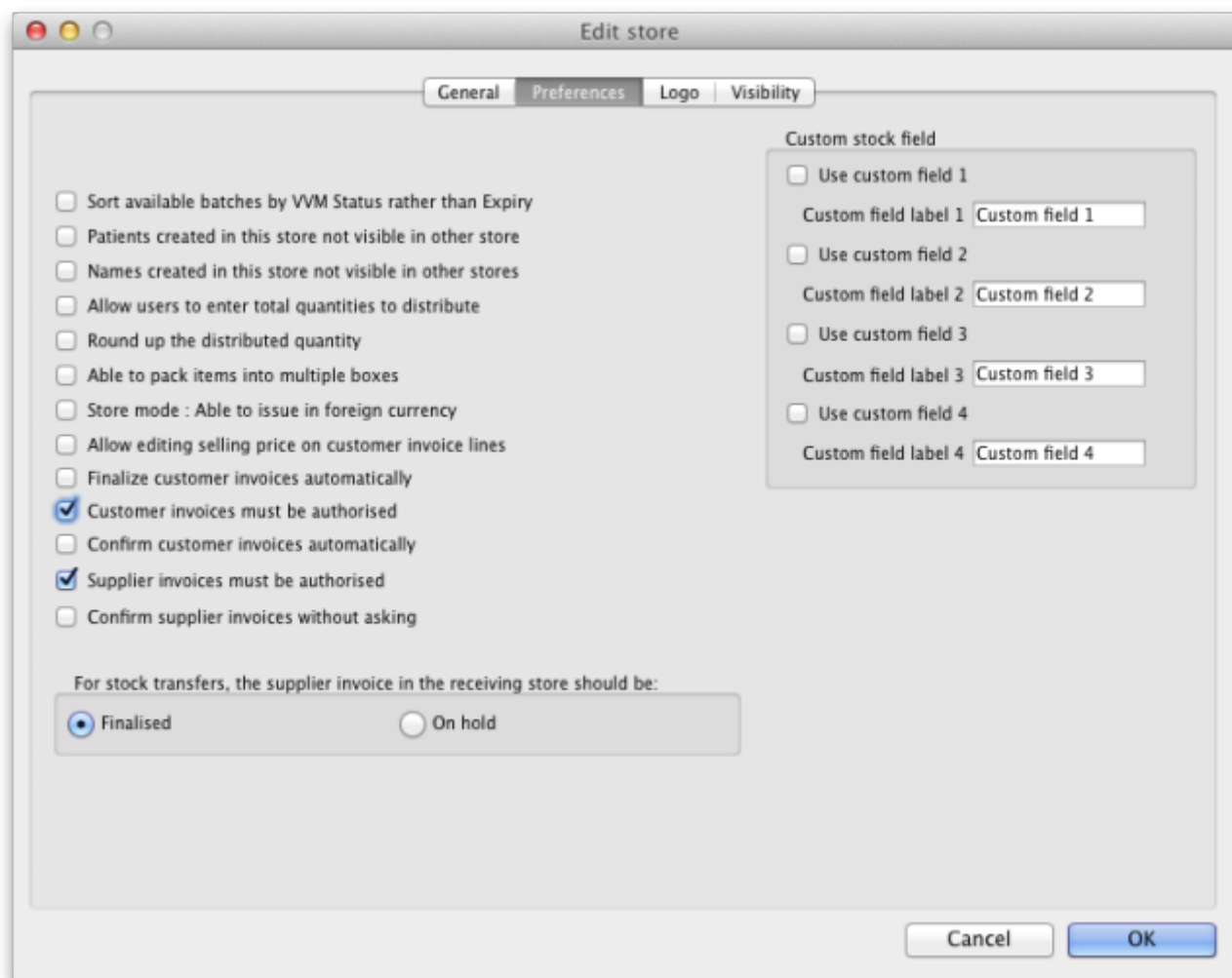
Category	Permission	Status
Document management	Tenders	
	Upload document	✓
	Download document	✓
	Delete document	✓
	Quotes	
	Upload document	✓
	Download document	✓
	Delete document	✓
	Modify quotes entered by the supplier (via the website)	✓
Items Lines (Batches of stock)	Upload document	✓
	Download document	✓
	Delete document	✓
Stocktake	Create Stocktake	✓
	Delete Stocktake	✓
	Add stocktake lines	✓
	View stocktake lines	✓
	Edit stocktake lines	✓
	Delete stocktake lines	✓
	Can edit stocktake dates	✓
Virtual Stores	Create new stores	✓
	Edit store details	<input type="checkbox"/>
	Edit visibility in stores	✓
Reminder	Edit and delete reminders assigned to me	✓
Admin	Send email	✓
	Purge old records	✓
	View log	✓
	Set start of year stock	✓
	View/edit preferences	✓
	Export & import	✓
Backup data file	✓	

Buttons: All on, Delete, Cancel, OK

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.



The screenshot shows the 'Edit store' dialog box with the 'Preferences' tab selected. The dialog has four tabs: General, Preferences, Logo, and Visibility. The Preferences tab contains a list of checkboxes for various store settings. The following checkboxes are checked: 'Customer invoices must be authorised' and 'Supplier invoices must be authorised'. The following checkboxes are unchecked: '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', '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 automatically', and 'Confirm supplier invoices without asking'. Below the checkboxes, there is a section titled 'For stock transfers, the supplier invoice in the receiving store should be:' with two radio buttons: 'Finalised' (selected) and 'On hold'. To the right of the main checkbox list, there is a 'Custom stock field' section with four checkboxes, all of which are unchecked. Each checkbox is followed by a text field labeled 'Custom field label 1' through 'Custom field label 4', all containing the text 'Custom field 1' through 'Custom field 4' respectively. At the bottom right of the dialog are 'Cancel' and 'OK' buttons.

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.



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.



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

Invoice Category :

Authorized by :

Comments : Maria Ribeiro

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	
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	
Total:						647.68000		

Prepared By :

Checked By :

Authorised By :

Signature :

Signature :

Signature :

Delivered By :

Received By :

Signature:

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.

[illegible]

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