

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. 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, 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 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.

Supplier invoice

Name: Abbot Laboratories (singapore PTE.LTD) Entry date: 22/05/2013 Colour: Black

Their ref: SNG102 Confirm date: 22/05/2013 Invoice number: 2,010

Comment: Status: cn

Category: None Goods receive ID: 0

Default Donor: Purchase Order ID: 0

Entered by: Sussol

Store: General

Lo...	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	Abacavir 300 mg	10	1	1.1.1	01/01/2016	20.00000	20.40000	200.00000

Other charges

Item(s):

Amount: 0.00000

Subtotal: 200.00000

0 % tax: 0.00000

Total: 200.00000

Hold

Finalize

Export batch: 0

Margin: 2.00

Authorised

OK & Next Delete OK



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.

- 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.

Goods receipt authorisation

<https://docs.msupply.org.nz/>

Supplier: Gold medical supplies

Received date: 05/11/19

Tender reference:

Supplier reference:

Comment:

Store: General Warehouse

Goods received ID: 12

Created by: Admin

Modified by:

Entry date: 05/11/19

Purchase order: 12

Supplier Invoice: 0

Status: mw

Add from purchase order Add an un-ordered item Delete line Check space Print goods receipt

Line	Location	Item code	Item name	Batch	Exp date	Pack Size	Quan	Authorised
1		aci250t	Aciclovir sodium 250mg inj	HYE778	31/5/25	10	20	<input type="checkbox"/>

Authorisation comment:

☐ Finalise

OK & Next Delete OK

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.

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

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

Invoice Category :
 Comments : Maria Ribeiro

Authorized by :
 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:

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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