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 authurisation 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:

000	S	upplier invoice			
Name Abbot Laboratories (singapore PTE.LTD Their ref SNG102 Comment New line Delete line Ceneral	C Default Summary by I	Entry date : 22/0 Confirm date : 22/0 ategory None Donor: tem Summary by Bat	5/2013 5/2013 ‡ ch Price	Invo Good Purcha Log	Colour : Black ice number : 2,010 Status : cn s receive ID : 0 se Order ID : 0 Entered by : Sussol Store : General
Lo Item Name	Qty Pack	Batch Expiry	Cost Price	Sell Price	Price extension
Other charges Item(s): Amount: 0.000 Hold Export batch: 0 Finalize Margin: 2.00 Authorised	000		OK & Next	Delete	Subtotal: 200.00000 0 %tax: 0.00000 Total: 200.00000 OK ©

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.

• 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.

		Customer in	voice	
Name Acum	ao/Remexio CHC	Confirm date	23/05/2013	Colour : Black
Their ref Comment	AlL-403-2	Category Eackorders	None 2	Invoice : 9,252 Entry date : 23/05/2013 Goods receive ID : 0 Status : cn Entered by : Sussol
	General Summary b	y Item Summary by	Batch Transport details Log	Store : General
L Location	Item Name	Quan Pack Size	Batch Exp date Sell Price	Price exten
	Acces Pin With Stopper for use IV.Inj. site		0.61148	1.22296
Hold	Other charge	s Item:		Amount: 0.00000 Subtotal: 1.22296 0 % tax: 0.00000 Total: 1.22000
Finalize Authorised	Export batch: 0		OK & Next	Delete OK Ø

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:

Last update: 2021/10/15 13:54	other_stuff:invoice_authorization https://docs.msupply.org.nz/other_stuff:invoice_authorization?rev=1634306093
----------------------------------	--

	Supplier	Gold medical s	upplies					Store: G	eneral Warehouse
Rece	ived date	05/11/19	Tender reference					Goods receiv	ed ID : 12
Supplier	reference							Creat	ed by : Admin
	omment							Modifi	ed by :
								Entry	date : 05/11/19
								Purchase Supplier In	order : 12
								S	tatus : nw
	2			Delete line					
Add fro	om purcha	se order Av	od an un-ordered item	Delete line	Check space Ph	nt goods receipt			
Line	Location	Item code	ltem r	ame	Batch	Exp date	Pack Size	Quan	Authorised
1		aci250t	Aciclovir sodium 250	img inj	HYE778	31/5/25	10	20	
Authorisa	ation comm	nent:							

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.

	•			N	ew pure	chase ord	er					
	Order num : 2	Name										Black
0	Confirm date : 00/0	00/00					Ref	erence			Status sg	
Reque	ested delivery: 01/0	06/2017									Store: Ge	neral
		General Deta	ils Ad hoc	items	Goods	Received	Supplier inv	oices Log	Location			
•		3				\checkmark						
New	line Delete lin	es Update EDD	Info	Print	c	onfirm		Categ	ory none		٢	
show	all lines	•					Cur	rrency USD	0	Forex rate	1	
Line	Item code	Item	Orig.Qty	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Expected	Store:
	Supplier discou	int							Ea	Constant exclusion	stal	
S	Percentage	0 Discount amo	unt	0	.00				Estimated co	st after disco	unt	0.0
_	C interio											
	Locked	Auto calc u	sage									
	Finalise order	Authorise						OK & Next		Delete		ж

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.

pplied to :							Status: cn
tibe/Ustaco						Comment : Ma	ria Ribeiro
tibe, OECUSSI						Confirmed: 1	1/12/2012
						Printed: 2	3/05/2013
voice Category :					A	uthorized by :	
mments :	Maria Ribeiro			\sim		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 Disposi	ble Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
27 Dispose	ble Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100		00/00/00	0.01	1.00	
28 Dispose	ble Needle 23 G x 1.1/4 0.65 x 32mm	100	1	00/00/00	0.01	1.00	
		151	-		Те	otal: 647.68000	
Prepared By :	Signature :	Delivered By :	Signature:	_			
Checked By :	Signature :	Received By :	Signature:				
Authorised By :	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.

00		Customer invoice [Read Only]		
Name	- 1	Confirm date 23/05/2013		Colour : Black
Their ref	DILI-099-1			Invoice : 9,259
Comment		Category None	: 6:	Entry date : 23/05/2013
				Goods receive ID : 0
				Status : fn
				Entered by :
				Store - Conoral
	General Summ	ary by Item Summary by Batch Transport of	details Log	store : General
Date	Time Us	er	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 D	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

