

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, 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 *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:

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 a 'Customer invoice' window. At the top, there are input fields for 'Name' (Acumao/Remexio CHC), 'Confirm date' (23/05/2013), 'Colour' (Black), 'Their ref' (AIL-403-2), 'Comment', 'Category' (None), 'Invoice' (9,252), 'Entry date' (23/05/2013), 'Goods receive ID' (0), 'Status' (cn), 'Entered by' (Sussol), and 'Store' (General). Below these are icons for 'New line', 'Delete line(s)', 'Backorders', and 'History'. A tabbed interface shows 'General' selected. A table with columns: L, Location, Item Name, Qty, Pack Size, Batch, Exp date, Sell Price, Price exten. contains one row: 1, 1, Acces Pin With Stopper for use IV.Inj. site, 2, 1, , , 0.61148, 1.22296. At the bottom, there are 'Other charges' and 'Item' fields, and a summary section with 'Amount: 0.00000', 'Subtotal: 1.22296', '0 % tax: 0.00000', and 'Total: 1.22000'. Checkboxes for 'Hold', 'Finalize', and 'Authorised' are at the bottom left, with 'Authorised' highlighted. Buttons for 'OK & Next', 'Delete', and 'OK' are at the bottom right.

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:

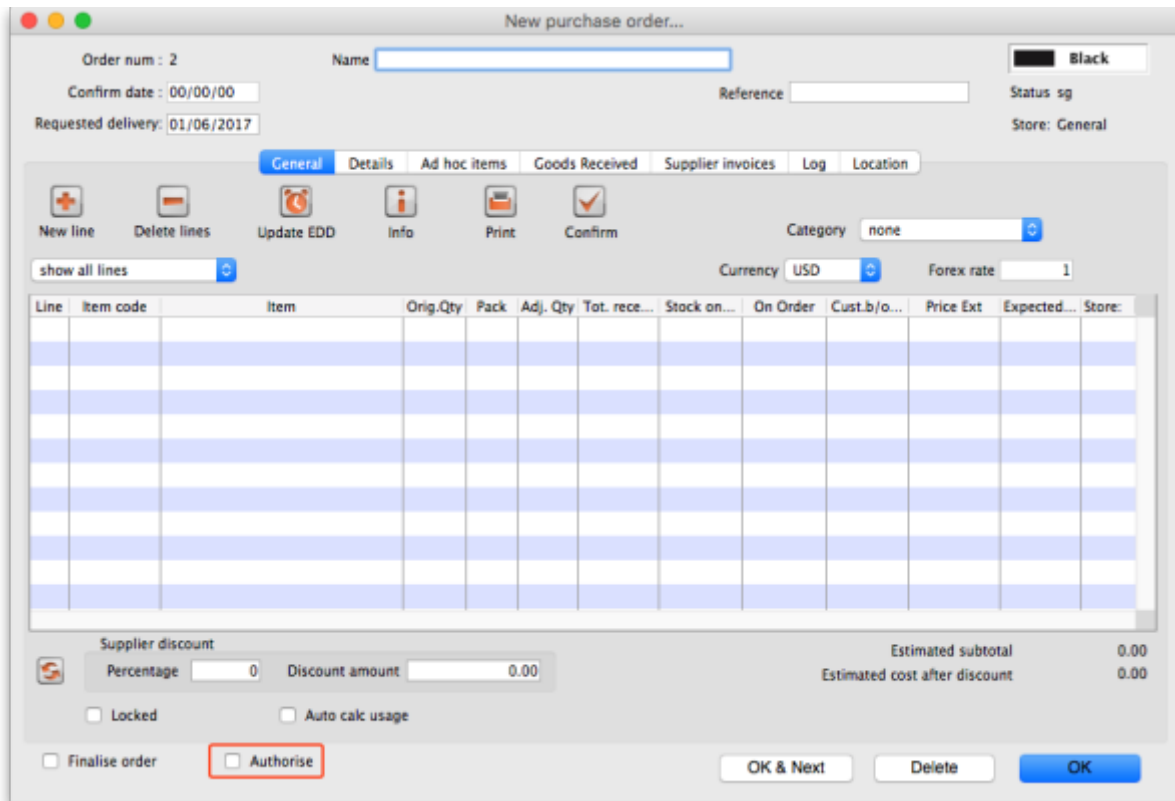



- Unauthorised invoices are held at suggested (sg) status.
- The official invoice cannot be printed.
- Goods are not removed from stock.

Goods receipt authorisation

Purchase order authorisation

When the *Purchase orders must be authorised* store preference is set, new purchase orders will show an **Authorised** checkbox:





- 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
Page 2 of 2

Supplied to :
 NRibe/Ustaco
 NRibe, OECUSSI

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 :

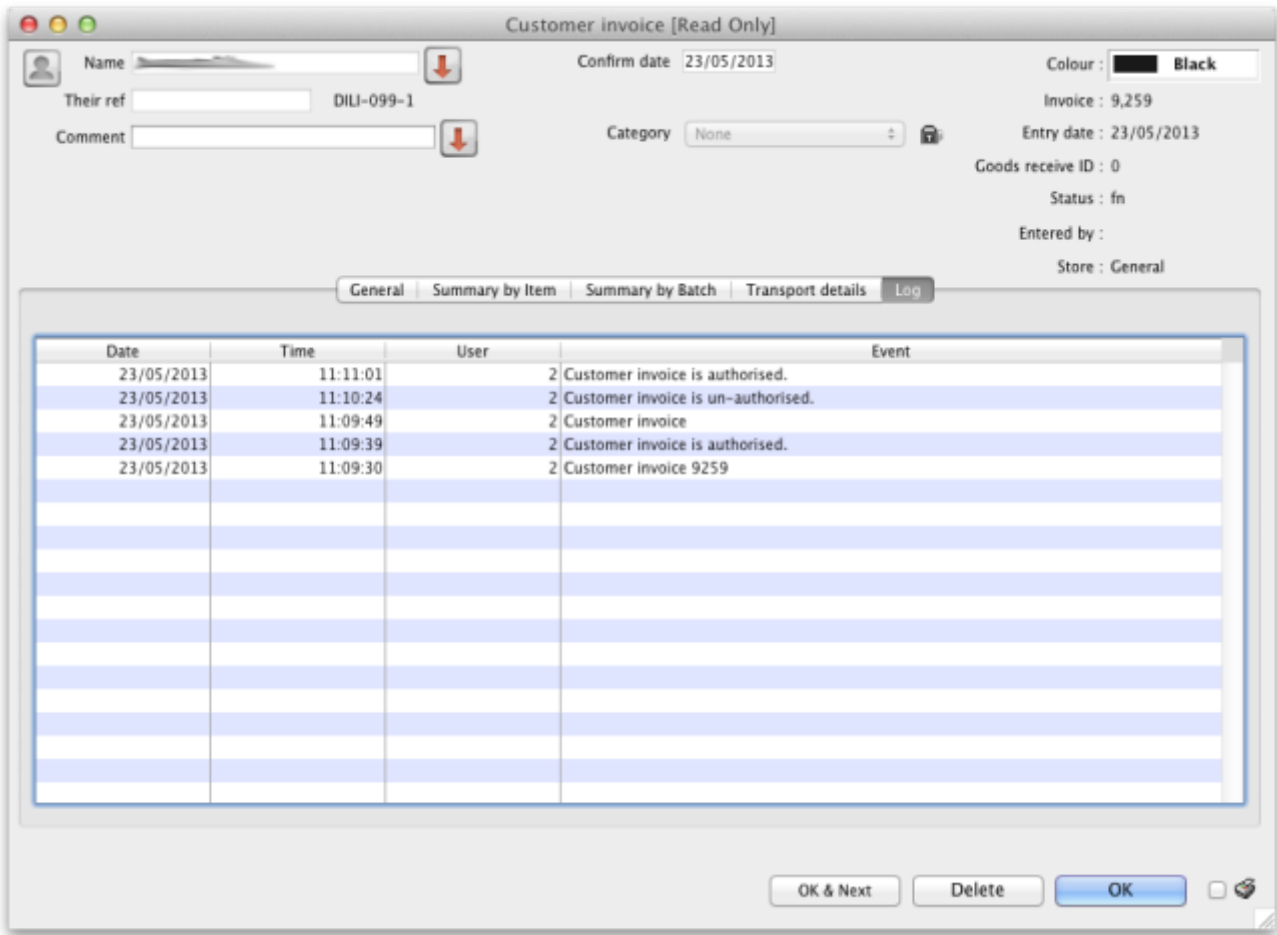
Delivered By :
Received By :

Signature:
Signature:
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...**

Previous: [26.13. Using the mSupply remote client](#) | | Next: [26.15. Remote authorisation](#)

From:
<https://docs.msupply.org.nz/> - **mSupply documentation wiki**

Permanent link:
https://docs.msupply.org.nz/other_stuff:invoice_authorization?rev=1671504083

Last update: **2022/12/20 02:41**

