



DATAFLOW  
Financial Software Solutions

## ***Authorising Orders and Invoices***

Dear user,

You must make sure that you have read “Navigating the System” first before reading any other Clarity guides as without a good knowledge of the navigation you will not fully benefit from the features and shortcuts that Clarity will provide for you.

Click here to read Navigating the System:

[https://dataflow.co.uk/images/uploads/release\\_notes/Clarity - Navigating the System .pdf](https://dataflow.co.uk/images/uploads/release_notes/Clarity - Navigating the System .pdf)

Also at the end of each guide, there may be a list of other supplements for further explanation of features within this routine.

Enjoy exploring Clarity and please do not hesitate to suggest any improvement that you feel will be useful to add to this document.

Warmest regards

Dataflow (UK) Ltd



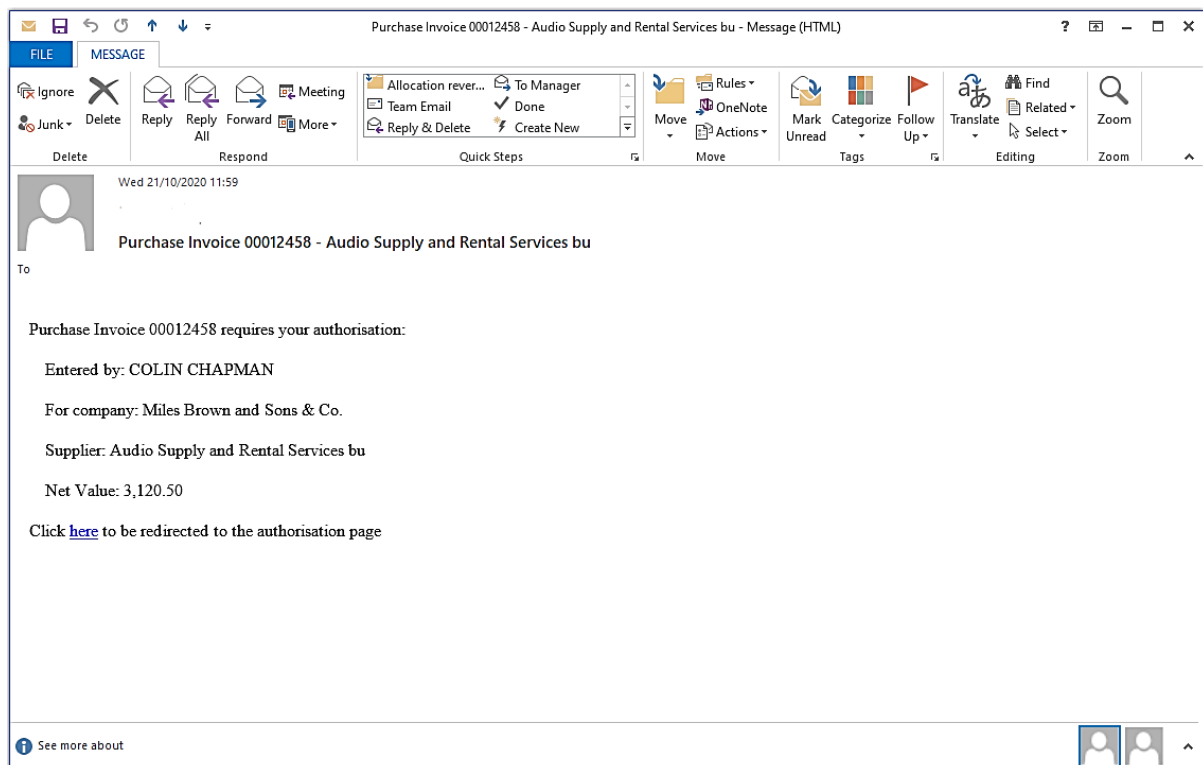
This guide will take you through the process of authorising Orders and Invoices.

The following example is for the authorisation of a Purchase Invoice, however, the same process applies for authorising Orders.

Once a Purchase Invoice has been created Clarity will use the invoice value/Nominal/Cost Centre to determine who the Invoice authorisation request will be emailed to. The system can also be configured so that the user can route a document for authorisation manually.

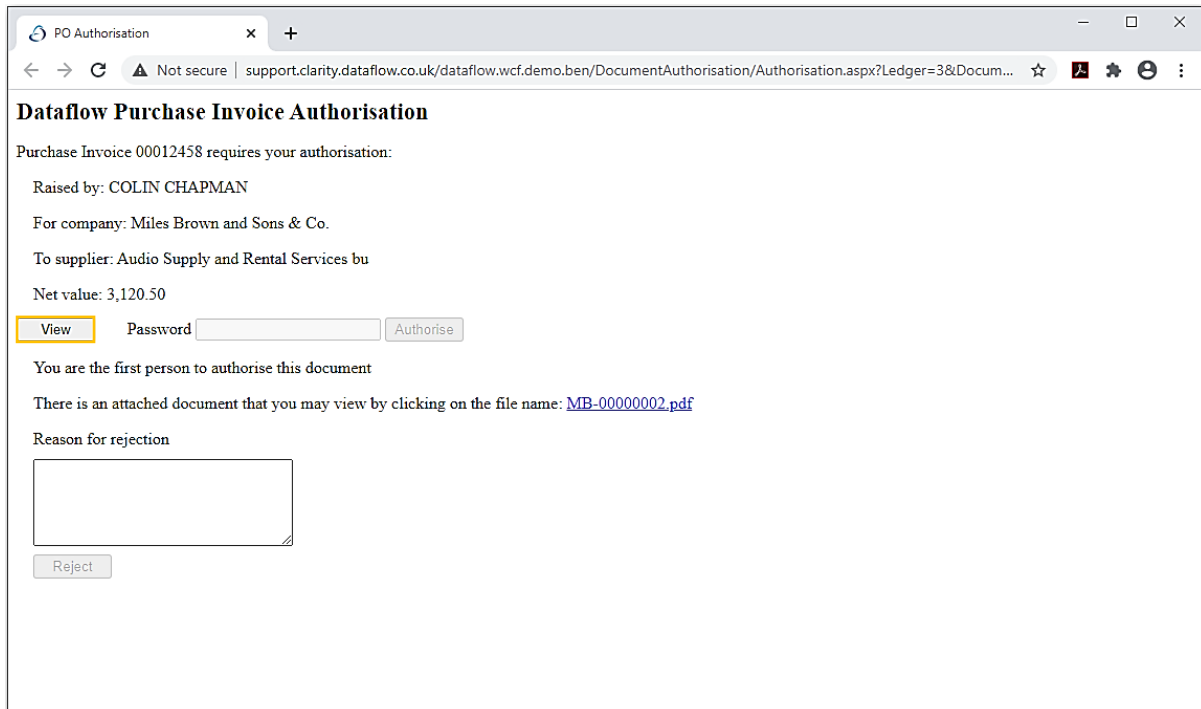
You can authorise/reject a document either by login to Clarity and use the Approval facility provided in the product OR use the hyperlink provided in the email that is sent to you by Clarity saving you time to login.

Below is an example of an emailed authorisation request:



The [Click here to be redirected to the authorisation page](#) link, will automatically open your default internet browser and take you to the authorisation page.

An example of this page is detailed below:



**Dataflow Purchase Invoice Authorisation**

Purchase Invoice 00012458 requires your authorisation:

Raised by: COLIN CHAPMAN

For company: Miles Brown and Sons & Co.

To supplier: Audio Supply and Rental Services bu

Net value: 3,120.50

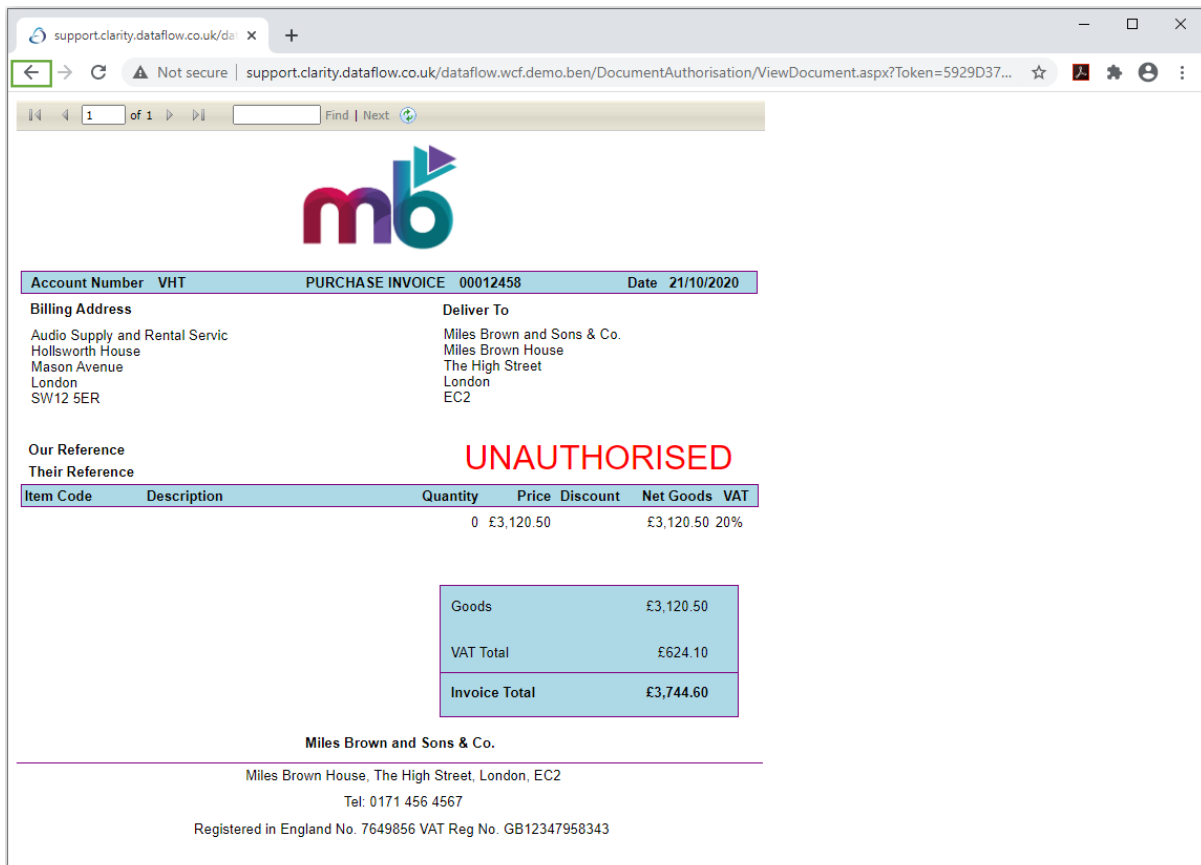
**View** Password  Authorise

You are the first person to authorise this document

There is an attached document that you may view by clicking on the file name: [MB-00000002.pdf](#)

Reason for rejection

To authorise the invoice you must first view the invoice using the **View** button (highlighted above in yellow). By doing so the browser page will change and display the entered invoice, Example below:



support.clarity.dataflow.co.uk/da

support.clarity.dataflow.co.uk/dataflow.wcf.demo.ben/DocumentAuthorisation/ViewDocument.aspx?Token=5929D37...

1 of 1 Find | Next

**mb**

Account Number	VHT	PURCHASE INVOICE	00012458	Date	21/10/2020
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**Billing Address**

Audio Supply and Rental Serv  
Hollsworth House  
Mason Avenue  
London  
SW12 5ER

**Deliver To**

Miles Brown and Sons & Co.  
Miles Brown House  
The High Street  
London  
EC2

**Our Reference**

**UNAUTHORISED**

**Their Reference**

Item Code	Description	Quantity	Price	Discount	Net Goods	VAT
		0	£3,120.50		£3,120.50	20%

Goods	£3,120.50
VAT Total	£624.10
<b>Invoice Total</b>	<b>£3,744.60</b>

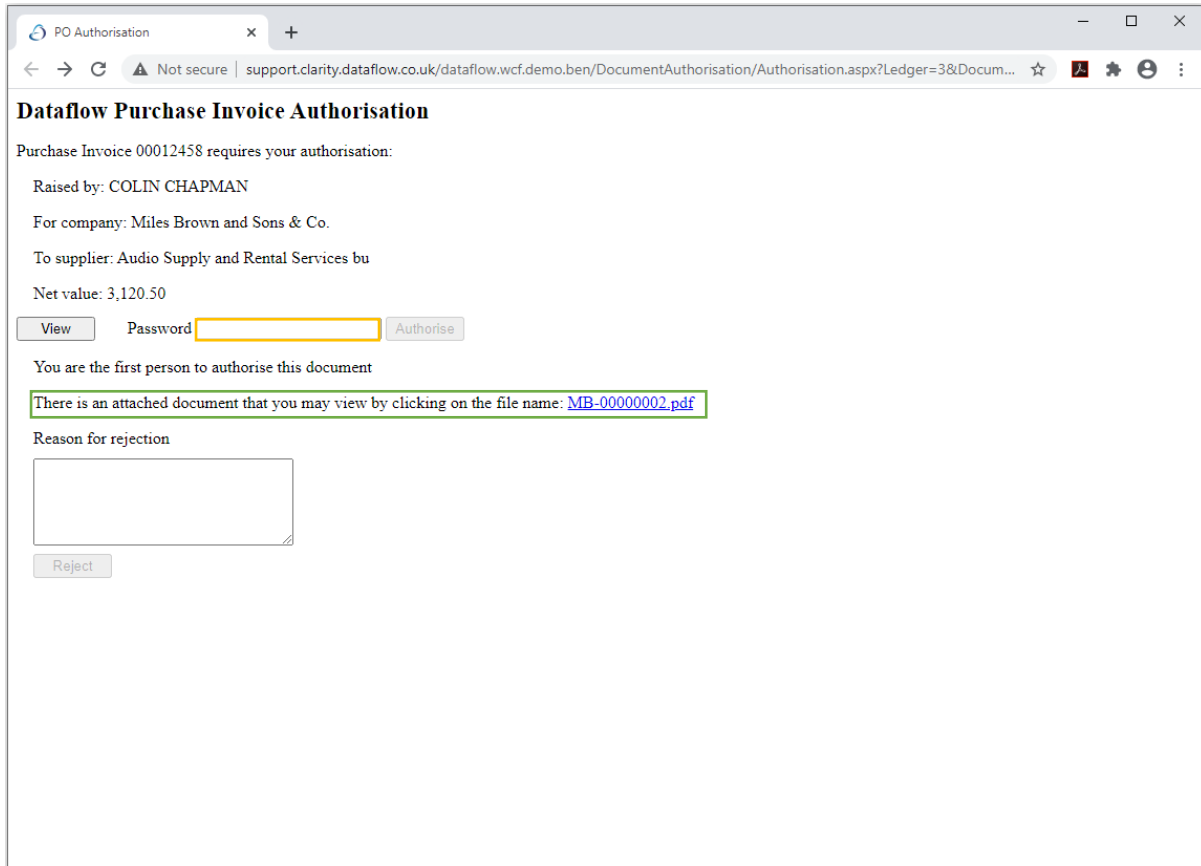
**Miles Brown and Sons & Co.**

Miles Brown House, The High Street, London, EC2

Tel: 0171 456 4567

Registered in England No. 7649856 VAT Reg No. GB12347958343

Once you have reviewed the Invoice use the browsers back button (highlighted above in green) to return to the Invoice Authorisation page. Now you've viewed the invoice you will be able to enter your Clarity user password into the *Password* field (highlighted below in yellow). Entering your Clarity password will enable the *Authorise* button.



PO Authorisation

Not secure | support.clarity.dataflow.co.uk/dataflow.wcf.demo.ben/DocumentAuthorisation/Authorisation.aspx?Ledger=3&Docum...

### Dataflow Purchase Invoice Authorisation

Purchase Invoice 00012458 requires your authorisation:

Raised by: COLIN CHAPMAN

For company: Miles Brown and Sons & Co.

To supplier: Audio Supply and Rental Services bu

Net value: 3,120.50

Password

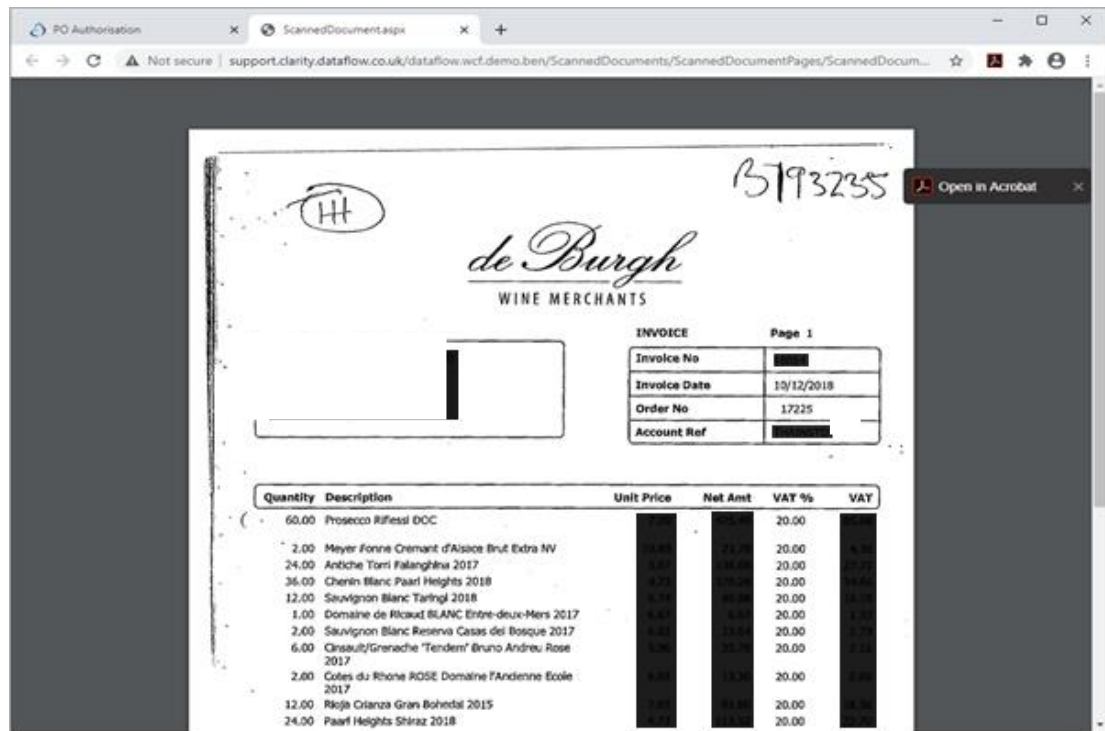
You are the first person to authorise this document

There is an attached document that you may view by clicking on the file name: [MB-00000002.pdf](#)

Reason for rejection

If a digital copy of the original invoice has been attached to the invoice entered in Clarity you may also view this attached document clicking the link within the section highlighted above in green. Doing so will open an additional browser tab displaying the original invoice, allowing you to compare the entered invoice and supplier invoice prior to authorising.

The image below shows an example of how the supplier invoice is displayed:



Once you're ready to authorise the invoice and have entered your Clarity password simply click on the **Authorise** button (highlighted below in yellow) to complete the authorisation process.

**Dataflow Purchase Invoice Authorisation**

Purchase Invoice 00012458 requires your authorisation:

Raised by: COLIN CHAPMAN

For company: Miles Brown and Sons & Co.

To supplier: Audio Supply and Rental Services bu

Net value: 3,120.50

View Password  **Authorise**

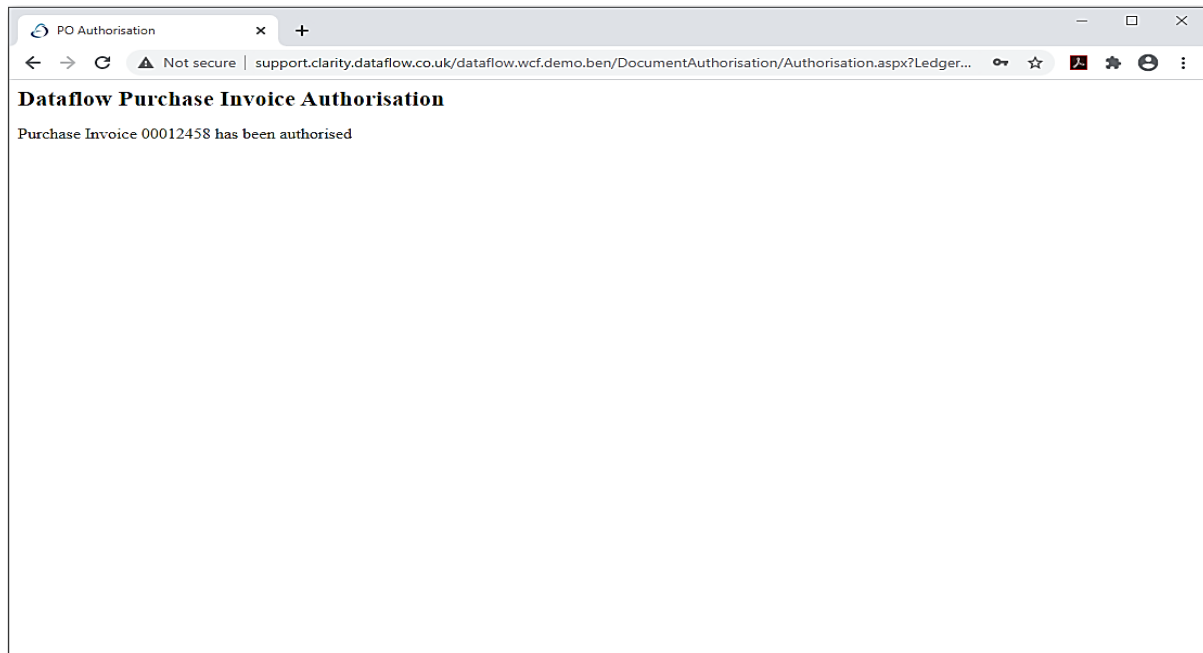
You are the first person to authorise this document

There is an attached document that you may view by clicking on the file name: [MB-00000002.pdf](#)

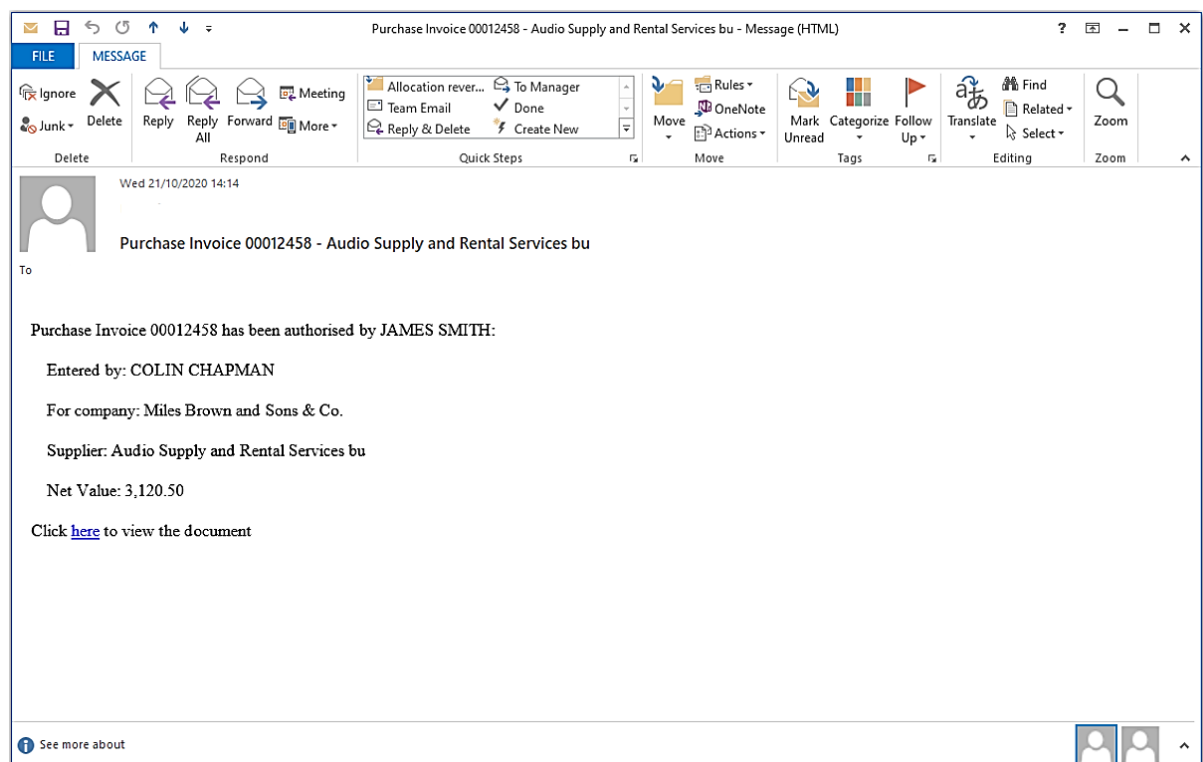
Reason for rejection

Reject

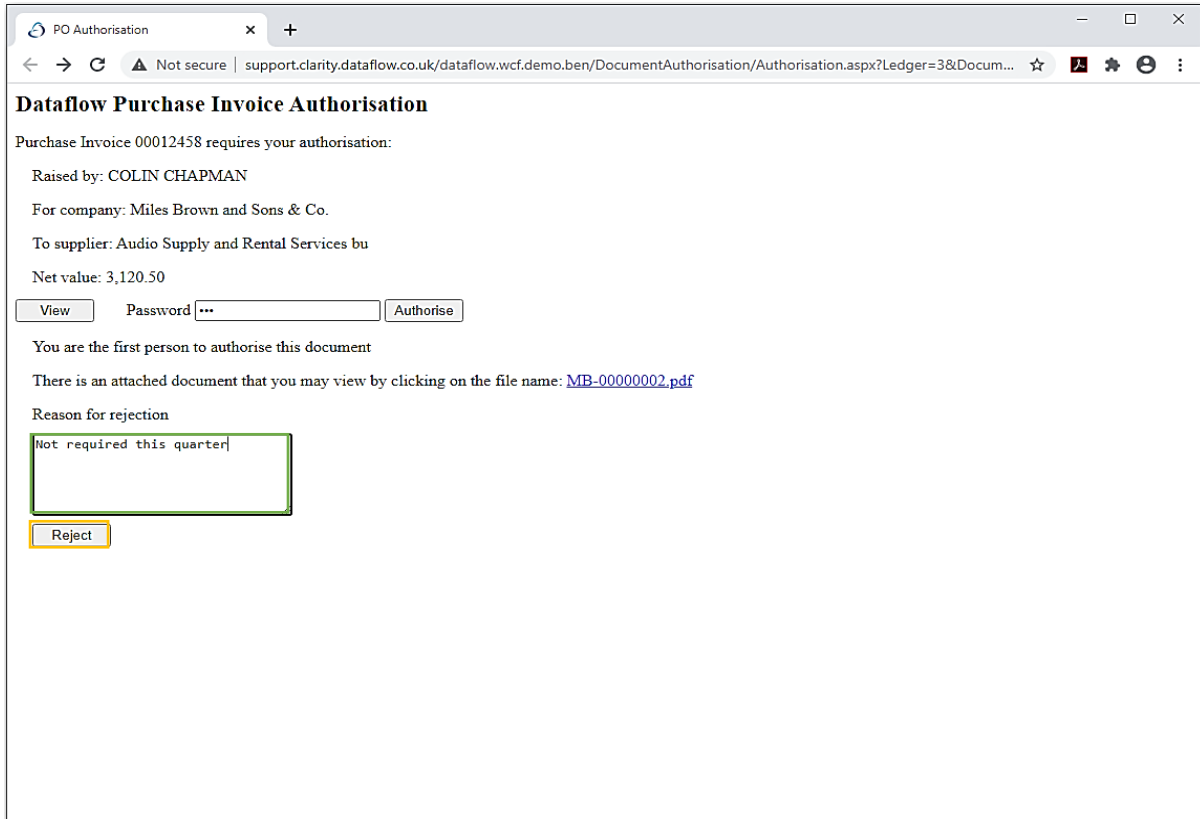
Once you've completed the authorisation the authorisation page will change and confirm that the authorisation process was successful. At this point you can simply close the browser. An example of this page below:



Once you've successfully authorised an invoice a confirmation email notification will be automatically sent to the user and or a predetermined mailbox confirming the authorisation. An example of the confirmation email notification below:



Should you choose to reject the invoice authorisation request you will need to enter details within the *Reason for rejection* section (highlighted below in green) to enable the *Reject* button (highlighted below in yellow)



PO Authorisation

Not secure | support.clarity.dataflow.co.uk/dataflow.wcf.demo.ben/DocumentAuthorisation/Authorisation.aspx?Ledger=3&Docum...

### Dataflow Purchase Invoice Authorisation

Purchase Invoice 00012458 requires your authorisation:

Raised by: COLIN CHAPMAN

For company: Miles Brown and Sons & Co.

To supplier: Audio Supply and Rental Services bu

Net value: 3,120.50

Password

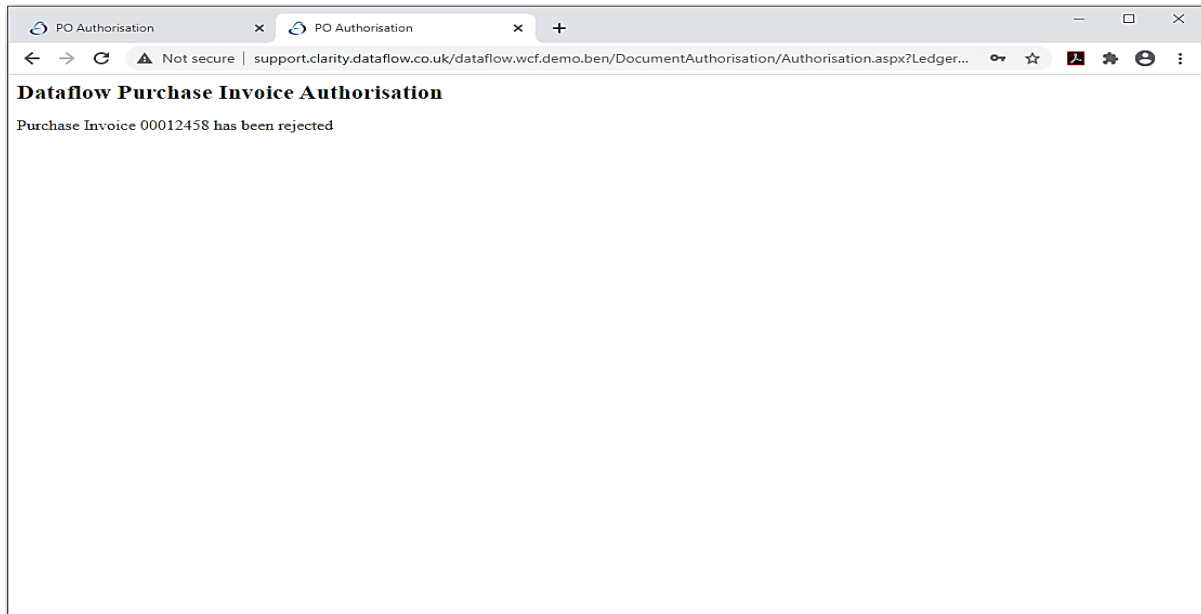
You are the first person to authorise this document

There is an attached document that you may view by clicking on the file name: [MB-00000002.pdf](#)

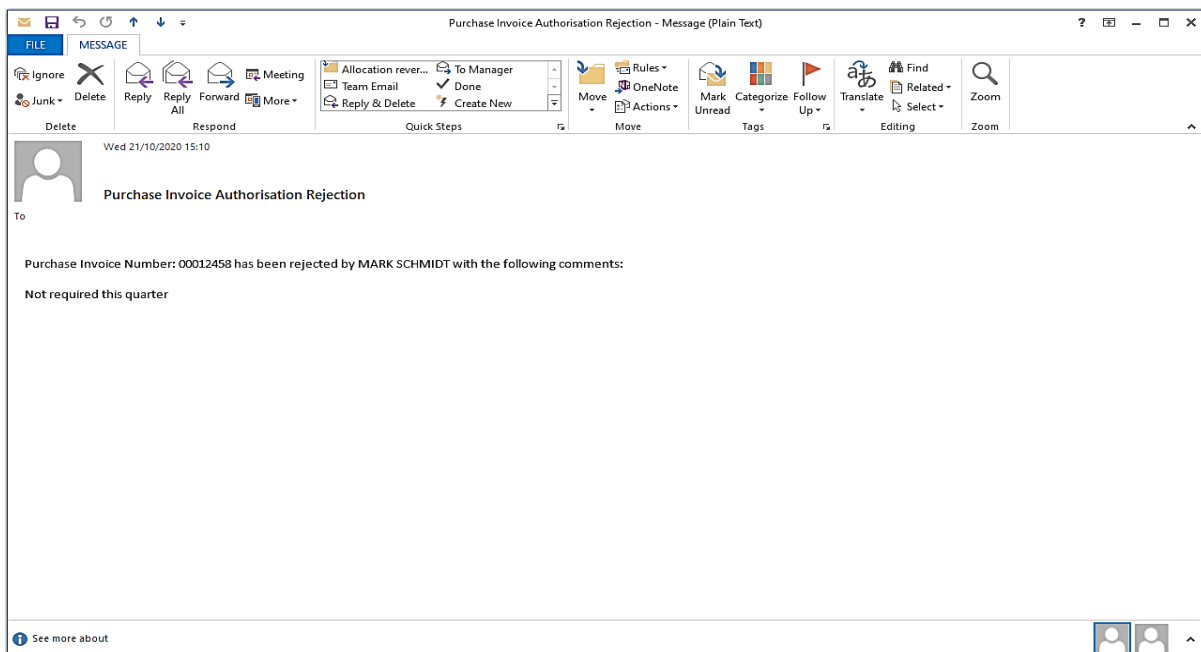
Reason for rejection

Not required this quarter

Once you've completed the rejection process the authorisation page will change and confirm the rejection was successful. At this point you can simply close the browser window. An example of this page below:

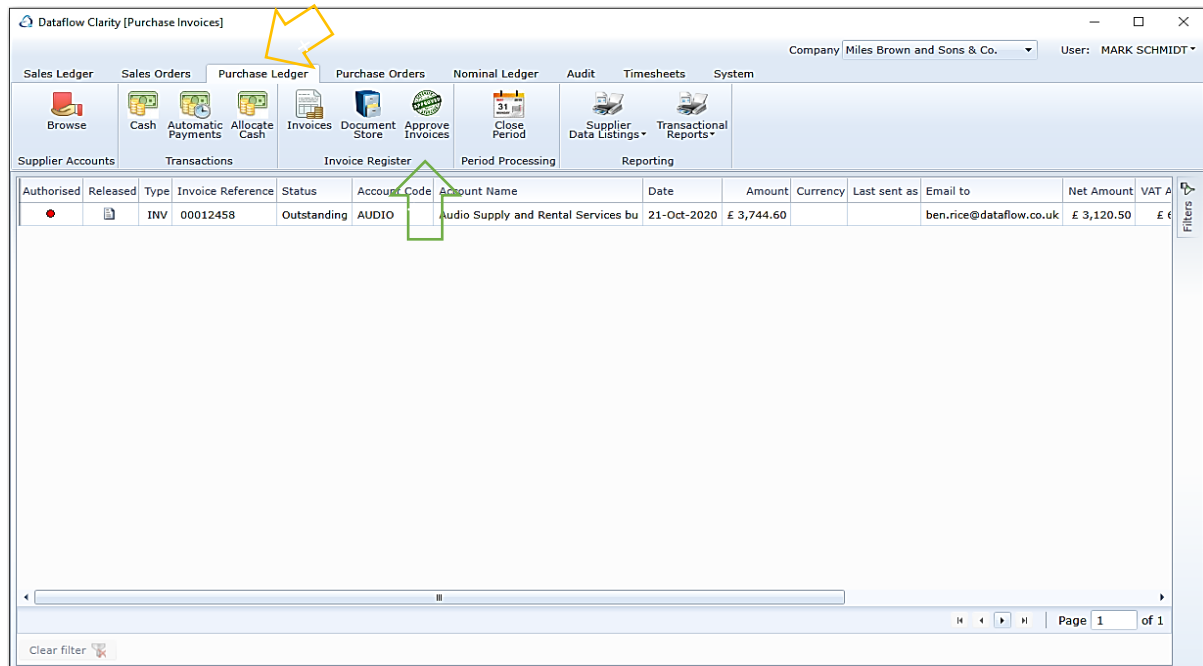


Once you've successfully rejected an invoice a confirmation email notification will automatically be sent to the user and or a predetermined mailbox confirming the authorisation. An example of this email notification below. This email also includes the rejection comments entered:

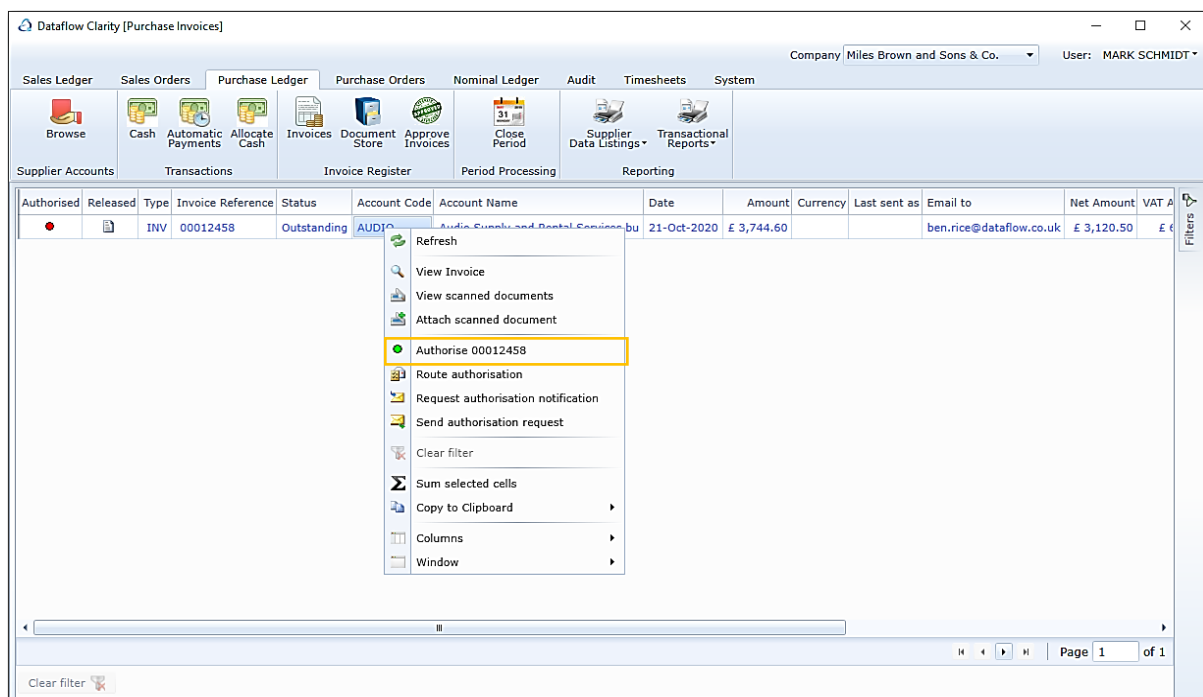




The guide above details how to authorise or reject authorisation via email requests using an internet browser. You may also authorise or reject invoice authorisation requests within Clarity as well. To do so simply login to Clarity and navigate to the *Purchase Ledger* (yellow arrow below) and *Approve Invoices* window (green arrow below). All invoices awaiting authorisation will be listed within this window.



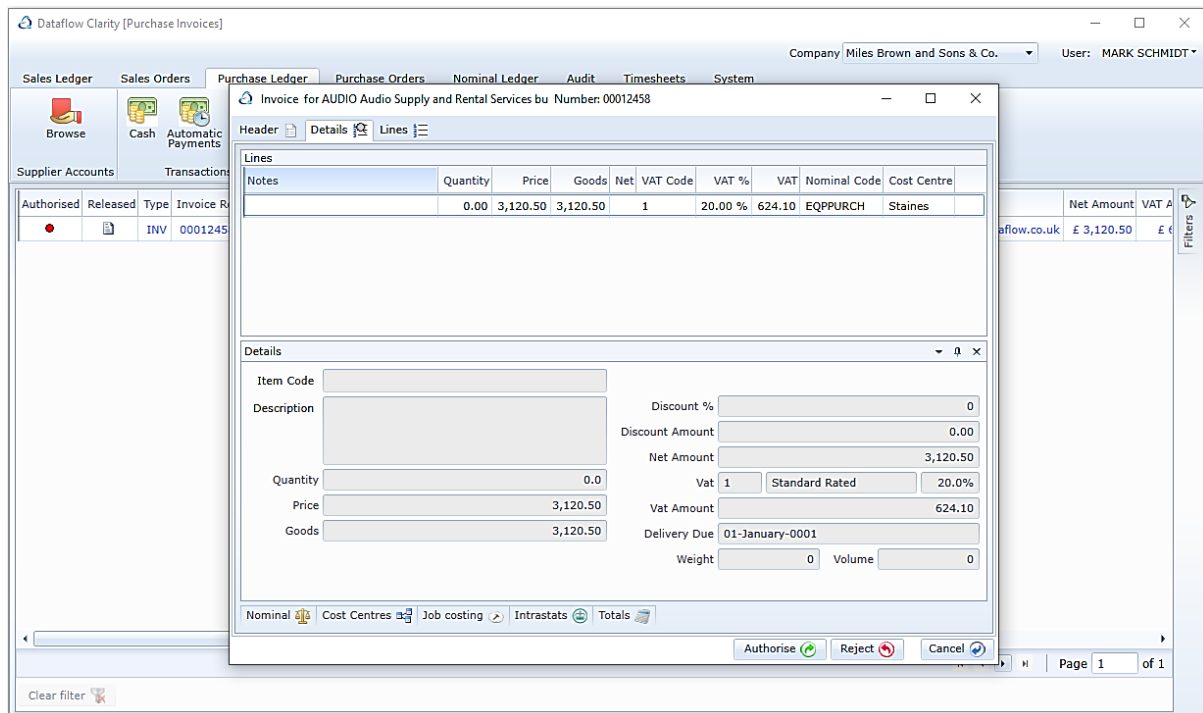
From here you can simply authorise the invoice using the right click menu (highlighted below in yellow).



You can also choose to open the invoice and review its details by double clicking on the invoice line.

Doing so will open the invoice form giving you access to all details entered against the invoice. Use the *Authorise* or *Reject* button on the footer of this form.

The same email confirmation will be sent to the authorisation requester regardless of whether you chose to authorise or reject via an internet browser or from within Clarity.



Dataflow Clarity [Purchase Invoices]

Company: Miles Brown and Sons & Co. User: MARK SCHMIDT

Sales Ledger Sales Orders Purchase Ledger Purchase Orders Nominal Ledger Audit Timesheets System

Invoice for AUDIO Audio Supply and Rental Services bu Number: 00012458

Header Details Lines

Notes	Quantity	Price	Goods	Net	VAT Code	VAT %	VAT	Nominal Code	Cost Centre
	0.00	3,120.50	3,120.50	1	20.00 %	624.10	EQPPURCH	Staines	

Details

Item Code: [ ]

Description: [ ]

Quantity: 0.0

Price: 3,120.50

Goods: 3,120.50

Discount %: 0

Discount Amount: 0.00

Net Amount: 3,120.50

Vat: 1 Standard Rated 20.0%

Vat Amount: 624.10

Delivery Due: 01-January-0001

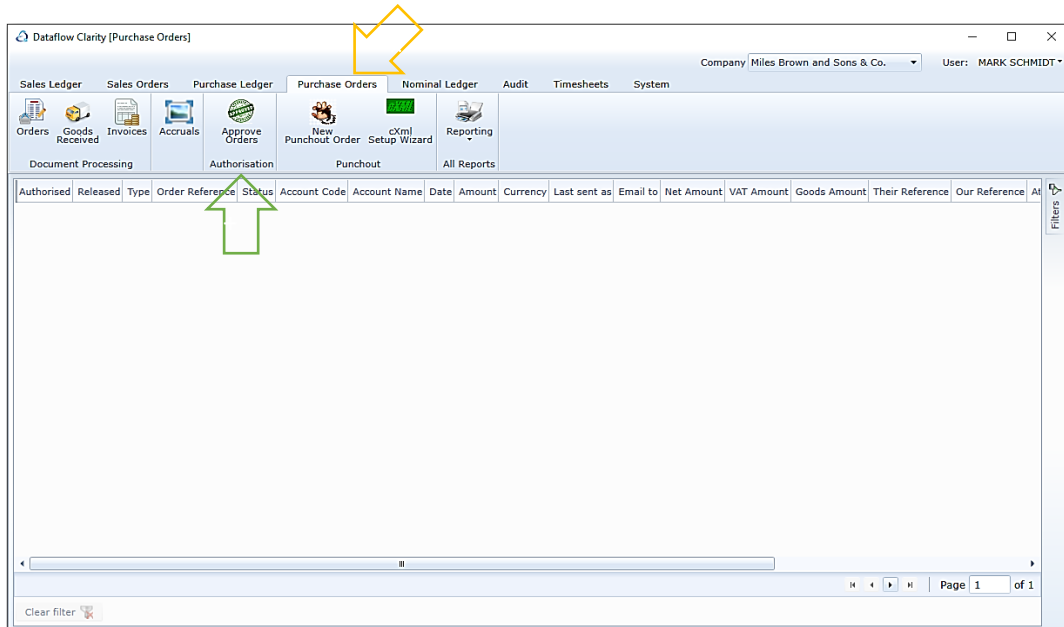
Weight: 0 Volume: 0

Nominal Cost Centres Job costing Intrastats Totals

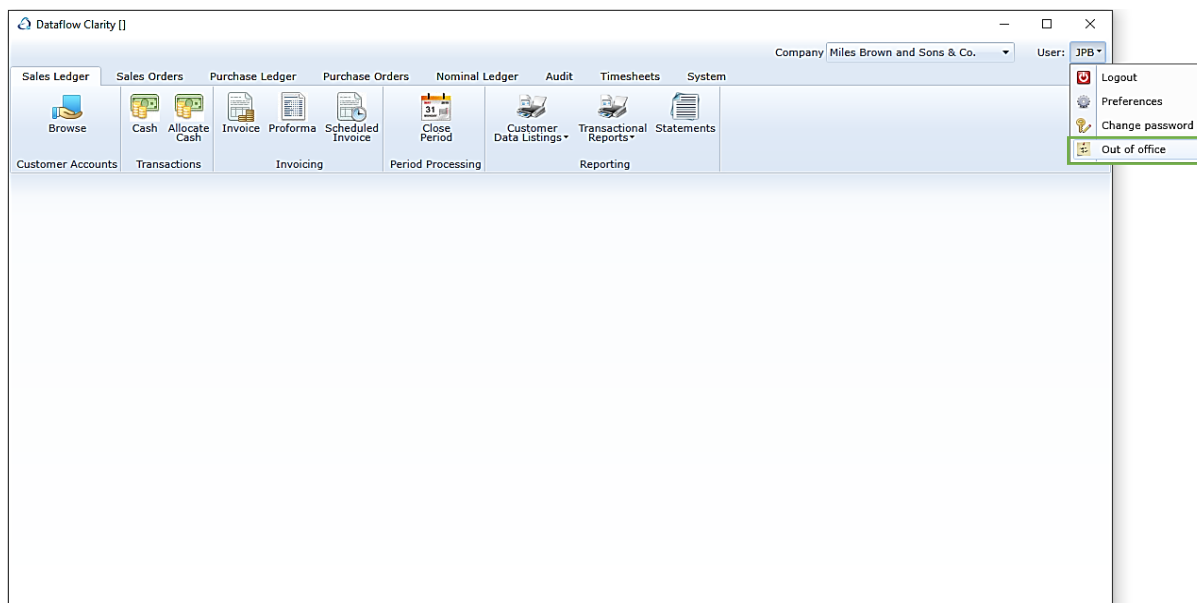
Authorise Reject Cancel

Page 1 of 1

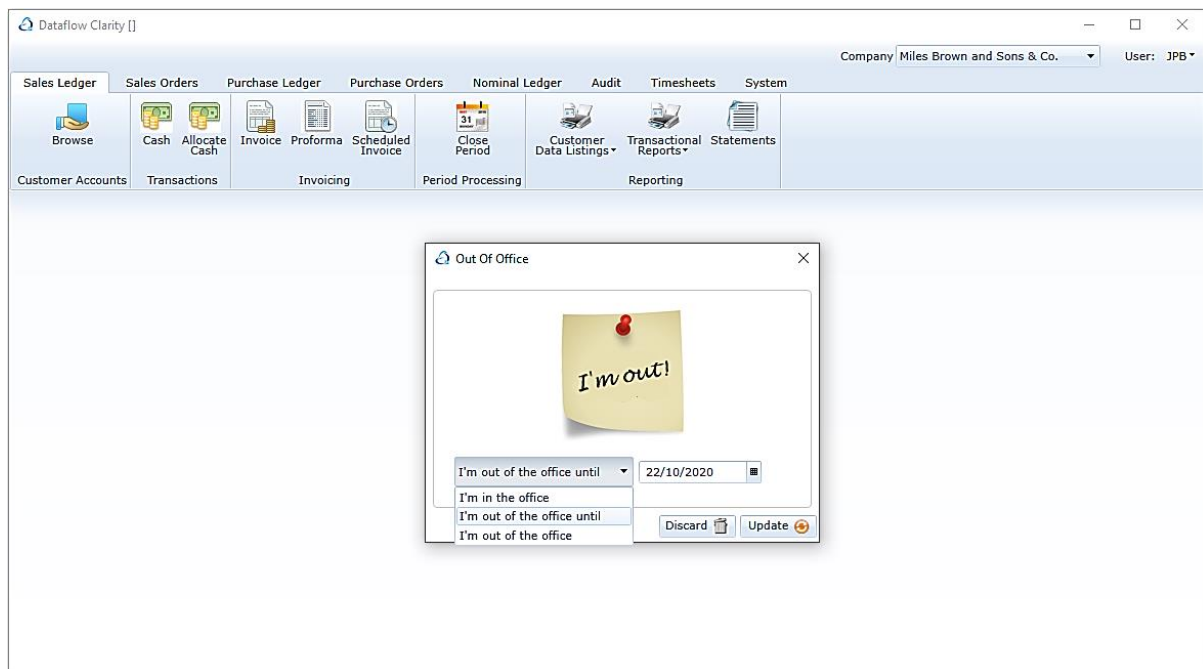
The process of authorising Purchase Orders is identical to the Invoice authorisation process detailed above. The only difference being that if you were to choose to authorise or reject Orders via Clarity instead of a browser you will need to login to Clarity and navigate to *Purchase Orders* (yellow arrow below) and the *Approve Orders* window (green arrow below).



In the event that you'll be unavailable to authorise Invoices or Orders you can adjust your availability status. To do so simply click on the User drop down tab in Clarity and select *Out of office* (highlighted below in green).



Selecting the *Out of office* option will open a new window where you can choose the most relevant option using the drop down.



By choosing either *I'm out of the office until* OR *I'm out of the office* Clarity will push any Invoice or Order authorisation request onto the next most suitable authoriser.

Your username will also be listed as out of the office should the authorisation requestor choose to manually pick who the authorisation request will be sent too.