



Authorisation Settings

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

If you are responsible to process Journals, you need to read Nominal Transactions next. Click here to read Nominal Transactions: https://dataflow.co.uk/images/uploads/release_notes/Nominal_Transactions.pdf

If you are responsible to process Supplier Payments, you need to read Automatic Payments. Click here to read Automatic Payments: https://dataflow.co.uk/images/uploads/release_notes/Automatic_Payments.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



The Authorisation Settings window allows you to control which Clarity users are able to authorise Nominal Journals and Purchase Ledger payments. A maximum amount limit can also be applied to those users set to be able to authorise those entries.

Users not set for authorisation are still able to enter Journals and payments, but will need to send the batch off for authorisation before those transactions are committed to ledger.

To set authorisation navigate to the System tab (blue arrow in the image below), then to Authorisation Settings (green arrow).

👌 Dataflo	w Clarity []										M	>					-	- 1	- X
														Company	Miles Browr	and Sor	ns & Co.	· u	ser: JPB*
Sales Led	ger Sales On	ders Pu	rchase Ledg	ger Pu	rchase Orde	rs N	ominal Ledg	ger Audi	t Tim	esheets S	ystem		2			A			
Users & Security*	Company & Consolidation*	VAT & Currency *	General Setup*	Invoicing	Order Processing	Genera Setup*	I Invoicing	Order Processing	Group Setup*	Cost Centre Apportionme	e& Bar int∗ Accor	nk Auti unts Limit	hority Setup	Authorisatio Settings	n Product Setup	Prices Setup	Price Categ & Measureme	ory nts ▼	Data Import
	General		:	Sales Ledg	er		Purchase Le	edger			Nominal	Ledger		\wedge		St	tock		Tools
													-	$ \uparrow \uparrow$	•				

Each Clarity user appears as a row within the Authorisation Settings grid. The grid is split into sections, the first section relates to journals.

Using the grid below as a reference:

The *Authorise Journals*? parameter (green column) controls whether that user is able to authorise Journals.

The *Limit Amount* parameter (yellow column) is only available for selection if the Authorise Journals? parameter is ticked.

The *Maximum Amount* parameter (red column) is only available for entry if the Limit Amount parameter is ticked. Double click on the amount field to edit (*Limit Amount* parameter must be ticked).



Using Colin Chapman as a reference (row highlighted in blue) you'll see that Colin is not able to authorise Journals (green column).

User James Smith is able to authorise Journals (green column), but only up to a certain value (yellow column). This value is set as £4000 (red column).

User JPB is also able to authorise Journals (green column), with no limit on the value he's able to authorise (red column).

Authorisation									_		×
User ID	Authorise Journals?	Limit Amount	Maximum Amount	Authorise Payments?	Limit Amount	Maximum Payment	Authorise Supplier?	By Company?	Companys		
COLIN CHAPMAN			£ 0.00			£ 0.00			<none></none>		
JAMES SMITH	1		£ 4,000.00	\checkmark	\checkmark	£ 4,000.00			<none></none>		
ЈРВ	\checkmark		£ 0.00	\checkmark		£ 0.00			<none></none>		
MARK SCHMIDT		V	£ 0.00		\checkmark	£ 0.00			<none></none>		
Test			£ 0.00		\checkmark	£ 0.00			<none></none>		
										Clos	e 🔀

The process below takes you through an example of Colin Chapman entering a Journal. As Colin is not able to authorise Journals of any value he'll need to request authorisation.

Once Colin has entered the Journal details he can send the Journal off for authorisation using the right click menu (highlighted in green below).



lournals Jo Adju	urnal Cashbook Cashb stments Postings Adjustr	ook Ren nents Po	curring Revalu stings Account	Reconcile Accounts	Close A Period repo	II Cha	ounts						
() Journals											-		×
A/c Code	A/c Description	Date	e Referenc	e Notes		Currency	Rate		Amount	Base Amount	Job Code	Job Line	Job (
ACCOUNTS	Accountancy Fees	15-Sep-	2020 test					£	1,000.00	£ 1,000.00			
ACCRUALS	Accruals	15-Sep-	2020 test	_				£-	1,000.00	£ -1,000.00			
Nominal Town Date	ACCRUALS Accruals Accruals 15 September 2020	© 0 4 1	Request author Reverse Paste Open	isation			▼	Currency Rate Amount	1.0	•			•
Reference Notes	test	() ()	Last saved colu Revert column l	mn layout layout to default									

Having selected the Request Authorisation option Clarity will prompt for him to select which user the authorisation request will be sent to.

The *Select User* list only displays users eligible to authorise the transaction type and value entered by Colin.

∂ Journals														-		×
A/c Code	A/c Description	Date	Refer	ence	Notes			Cur	cency	Rate		Amount	Base Amount	Job Code	Job Line	Job (
ACCOUNTS	Accountancy Fees	21-Sep-2020	Sept	Select	t User	-		×			£	1, <mark>000.00</mark>	£ 1,000.00			
ACCRUALS	Accruals	21-Sep-2020	Sept	JAMES S	SMITH				_		£ -1	1,000.00	£ -1,000.00			
Nominal Town Date Reference Notes Cost Centre	ACCRUALS ACCRUALS Accruals 21 September 2020 Sept Acc 2020	ch Totals 🛃		JPB		Cancel 🖓	ОК	3			Currency Rate Amount	1.0	•)[•
													Add 🍲 Rem	iove 🗙	Close	: 🔀



James Smith was the chosen authoriser. A confirmation dialogue is displayed once the authorisation request has been sent.

Dataflow	Clarity []												1	-	
									Comp	any Miles	Brown and Sons &	Co. •	User:	COLIN	CHAPMAN *
Sales Ledge	er Sales O	rders Purchase Ledger	Purchase C	raers Nor	ninal Ledger		D	System							
alla	25 35			Ş,∕£		31 mi	3								
Browse J	ournals Jou Adjus	irnal Cashbook Casht tments Postings Adjusti	ments Postings	Accounts A	accounts	Period	reports •	Accounts							
Accounts	🙆 Journals											-		×	
	A/c Code	A/c Description	Date	Reference	Notes		Currei	ncy Rate		Amount	Base Amount	Job Code	Job Line	Job (
	ACCOUNTS	Accountancy Fees	15-Sep-2020	Accounts Sep	t				£	1,000.00	£ 1,000.00				
	ACCRUALS	Accruals	15-Sep-2020	Accounts S	uthorisation			×	£ -:	1,000.00	£ -1,000.00				
					Autho	risation reques	t sent to JAMES	SMITH							
								07							
] -		1			-	
	Nominai	ACCRUALS ACCRUALS						•	Currency		•			- I	
	Town							•	Rate	1.0					
	Date	15 September 2020							Amount	-1000					
	Reference	Accounts Sept 2020													
	Notes														
		-													
	Cost Centres	ag Job Costing 🔊 Bat	ch Totals 📑												
											Add 🐈 Rem	nove 🗙	Close	\mathbf{X}	

Once the authorisation request is sent James Smith will receive an email notification.

I FILE MESSA	↑ ↓ = Journal batch, GE	last update at 21 September	2020 14:23:19 - 1	Message (Plain Text)	?	A –	• ×
fr Ignore Sunk → Delete	Reply Reply Forward E	Hlocation rever ∧ ♀ To Manager ▼ ा Team Email ▼	Move	Provement Mark Unread Mark Unread Categorize → Follow Up →	aggar and a second sec	Q Zoom	
Delete	Respond	Quick Steps 🕞	Move	Tags 🕞	Editing	Zoom	^
To Ben Rice	on 21/09/2020 14:23 dministrator burnal batch, last update a lournal Posting routine to rev equested by COLIN CHAPMA	at 21 September 2020 1 νίew mγ batch. N.	14:23:19				
See more about /	Administrator.						^



When James Smith next opens the Nominal Ledger Journal window an authorisation prompt will automatically appear within a *Batch Restore* window.

👌 Journal	s												—		\times
A/c Code	A/c Description	Cost Centre	Date	Reference	Notes	Currency	Rate	Amount	Base A	Amount	Job Code	Job Line	Job Cost		
A/c Code	A/c Description	Cost Centre	Date 21 Con 2020 Date Date Date Date Date Date Date Date Date Date	Reference Restore COLIN CHA red on: Mono updated on: prisation req	Notes PMAN day, Sep Monday uested:	Currency otember 21, y, Septembe JAMES SMI	, 2020 er 21, 2 TH	Amount	AM 5:55 AM		Job Code	Job Line	Job Cost		
Nominal Town Date	21 Septembe	▼ er 2020								-	•				•
Reference							Cane	el 🕢	OK	3					
Cost Cent	res 🚓 Job Cos	sting 亥 🛛 Bat	ch Totals 📑												
				Add 🌵	Re	move 🗙	-	Authorise	0	Reject	٠	Updat	:e 🛞	Close	×

Clicking the ok a button to authorise the journal will generate the journal entry Colin Chapman created. James Smith may either choose to complete the Journal and update to ledger using the Update () button, or simply authorise using the Authorise () button.

Choosing the option to only authorise will generate the following confirmation. Click the ok button to complete the authorisation process and return to the Journal input window. Close the Journal Input window.



👌 Journals												×
A/c Code	A/c Description	Cost Centre	Date	Reference	Notes	Currency	Rate	Amount	Base Amount	Job Code	Job Line	Job Cost
ACCOUNTS	Accountancy Fees		21-Sep-2020	Sept Acc 2020				£ 1,000.00	£ 1,000.00			
ACCRUALS	Accruals		21-Sep-2020	Sept Acc 2020				£-1,000.00	£-1,000.00			
 ✓ Nominal Town Date 	ACCRUALS /	Accruals	Aut	horisation Journals su	iccessful	ly authorise	ed Rate	e 1.0 t -1000.00				•
Reference	Sept Acc 2020											
Notes Cost Centre	s = Job Costing (Batch To	tals 🗧									
			A	dd 🌵 Remo	ve 🗙	Auth	iorise (🕐 Reject	•	Update 📀	Cl	ose 🔀

The journal has now been authorised. When Colin Chapman next opens the Nominal Ledger Journal window the following dialogue will automatically appear containing the authorisation process history.

Colin will need to click on the relating entry (highlighted in green) before clicking the or solution.

🙆 Journals											—		\times
A/c Code	A/c Description	Date	Reference	Notos	Curronau	Data		ب ۱	Amount	Base Amount	Job Code	Job Line	a Job (
		21-Sep-2020	62	Batch Restore	_		×		£ 0.00	£ 0.00			
Nominal Town Date Reference Notes Cost Centre:	▼ 21 September 2020	tch Totals		Created on: Monday, Septemb Last updated on: Monday, Sep Authorisation requested: JAME	eer 21, 2020 10:51:42 tember 21, 2020 10:5 \$ SMITH Cancel ?	АМ 8:58 АМ	1	rency Rate in a constant of the second secon	1.0				•

Clicking the ok button returns Colin to the journal input window containing the journal that was sent for James Smith for authorisation.



At this point Colin Chapman simply completes the journal by clicking the Update 😔 button.

(a) Journals												-		×
A/c Code	A/c Descrip	tion	Date	Reference	Notes		Currency	Rate		Amount	Base Amount	Job Code	Job Line	Job (
ACCOUNTS	Accountanc	y Fees	21-Sep-2020	Sept acc 2020					£	1,000.00	£ 1,000.00			
ACCRUALS	Accruals		21-Sep-2020	Sept acc 2020					£ -:	1,000.00	£ -1,000.00			
Nominal Town Date Reference Notes	ACCRUALS 21 September Sept acc 2020	Accruais 2020				B			Currency Rate Amount	1.0				•
Cost Centre	s 😫 Job Costi	ng 📀 🛛 Bato	h Totals 👫											
									Add	🜵 Re	move 🗙 Upd	late 🛞	Close	

👌 Journals										_		×
A/c Code	A/c Description	Date	Reference	Notes		Currency	Rate	Amount	Base Amount	Job Code	Job Line	Job (
ACCOUNTS	Accountancy Fees	21-Sep-2020	Sept acc 2020					£ 1,000.00	£ 1,000.00			
ACCRUALS	Accruals	21-Sep-2020	Sept acc 2020					£ -1,000.00	£ -1,000.00			
Nominal Town Date	ACCRUALS Accruais 21 September 2020 Sept acc 2020				Update Batch 676 upda	× sted K		Currency Rate 1.0 Amount -1000.00				
Natas												
Cost Centre	s 🖅 Job Costing 🔊 Bate	ch Totals 📑						Add 🖶 Re	move 🗙 Upd	late 📀	Close	



Should James decide to not authorise and Reject the journal using the Reject Solution Clarity will open a *Reject Journal* window where notes relating to why the Journal has been rejected will need to be entered.

🙆 Journals										_		×
A/c Code	A/c Description	Cost Centre	Date	Reference	Notes	Currency	Rate	Amount	Base Amount	Job Code	Job Line	Job Cos
ACCOUNTS	Accountancy Fees		21-Sep-2020	Sept acc 2020				£ 1,000.00	£ 1,000.00			
ACCRUALS	Accruals		21-Sep-2020	Sept acc 2020				£ -1,000.00	£ -1,000.00			
Nominal Town Date Reference Notes	ACCRUALS 21 September 202 Sept acc 2020	Accruals	C Reject Journ	nals d until next peri	od	ОК @		Cancel 🕢				
Cost Centre	s 📬 Job Costing	Batch To	tals 📑									
			Ad	dd 🌵 🛛 Remo	ve 🗙	Auth	orise	🕐 Reject	•	Update Θ	Cl	ose 🔀

Once the rejection notes have entered and OK'd a confirmation dialogue will be generated.

A/C COUC	A/c Description	Cost Centre	Date	Reference	Notes	Currency	Rate	Amount	Base Amount	Job Code	Job Line	Job Co
ACCOUNTS	Accountancy Fees		21-Sep-2020	Sept acc 2020				£ 1,000.00	£ 1,000.00			
ACCRUALS	Accruals		21-Sep-2020	Sept acc 2020				£ -1,000.00	£ -1,000.00			
•		Assuals	×									
Nominal Town Date Reference Notes	ACCRUALS 21 September 202 Sept acc 2020	20			OK		Rati	e 1.0 t -1000.00				



When Colin next opens the Journal entry window the Batch Restore window will automatically open. The authorisation rejection is indicated by the red arrow.

Colin can choose whether to click or concerned to open the rejected batch to make changes and re-send for authorisation or click cancel Clicking cancel will close the *Batch Restore* window allowing Colin to enter a new Journal batch.

🙆 Journals										-		×
A/c Code	A/c Description	Date	Refer		Date	~	1	Amount	Base Amount	Job Code	Job Line	Job (
		21-Sep-2020		2 Batch Restore -		^		£ 0.00	£ 0.00			
				Created on: Tuesday, September 15, 2020 9:29:48 / Last updated on: Tuesday, September 15, 2020 9:29 Authorisation requested: Created on: Tuesday, September 15, 2020 9:38:43 / Last updated on: Tuesday, September 15, 2020 9:38 Authorisation requested:	AM 9:48 AM AM 8:43 AM							
				Created on: Monday, September 21, 2020 10:51:42	AM							
•				Last updated on: Monday, September 21, 2020 10:	51:42 AM							•
Nominal	-			Authorisation requested: JAMES SMITH			rency		•			•
Town				Feedback: Posting delayed until hext period			Rate	1.0				
Date	21 September 2020						nount	0				
Reference												
Notes												
				Cancel 🕢	OK (
Cost Centre	s 📲 Job Costing 📀 🛛 Ba	tch Totals 📑										
									Add 🐈 Rem	ove 🗙	Close	- 🔀

The first section referred to the Journal Authorisation process. The section below refers to Payments.

Setting authorisation for Payments is similar to Journals.

The Authorise Payments? parameter (green column) controls whether that user is able to authorise payments.

The *Limit Amount* parameter (yellow column) is only available for selection if the *Authorise Payments*? parameter is ticked.

The *Maximum Amount* parameter (red column) is only available for entry if the *Limit Amount* parameter is ticked. Double click on the amount field to edit (*Limit Amount* parameter must be ticked).

Using the image below you'll see that Colin Chapman is not able to authorise payments (green column).

User James Smith is able to authorise payments (green column), but only up to a certain value (yellow column). This value is set as £4000 (red column).



User JPB is also able to authorise payments (green column), with no limit on the value JPB is able to authorise (red column).

Authorisation									_		×
User ID	Authorise Journals?	Limit Amount	Maximum Amount	Authorise Payments?	Limit Amount	Maximum Payment	Authorise Supplier?	By Company?	Companys		
COLIN CHAPMAN			£ 0.00			£ 0.00			<none></none>		
JAMES SMITH		1	£ 4,000.00	1		£ 4,000.00			<none></none>		
ЈРВ	I		£ 0.00	1		£ 0.00			<none></none>		
MARK SCHMIDT		1	£ 0.00			£ 0.00			<none></none>		
Test		1	£ 0.00		1	£ 0.00			<none></none>		
										Clos	se 🔀

In the image below Colin Chapman has started a purchase payment run. Due to Colin not being able to authorise payments Clarity prompts for an authorisation request to be sent.

🙆 Dataflow Clarity	y [Automatic Payr	ments]									-	_		×
						Compan	y Miles Bro	wn and S	Sons & Co.	•	User:	COLIN		1AN T
Sales Ledger	Sales Orders	Purchase Le	edger	Purchase Or	ders	Nominal Ledger	Audit	Time	esheets	System				
Browse	Cash Automa Paymen	atic Allocate Cash	Invoice	s Document Store	Approve Invoices	31 Close Period	Su Data l	pplier Listings •	Transactio Reports	nal				
Supplier Accounts	Transac	tions	I	Invoice Regist	er	Period Process	ing	Repo	orting					
How? Who? What?	R U	pdate t	he p	aymen	ts									
Cash	Update the payments Code Name Date Reference Notes Bank A/c Name Currency Rate Amount Image: Authorisation required Image: Authorisation required Image: Payments Payments Request authorisation? Image: Test State Image: No Image: No Image: No Image: No													
						Email	Remittances	s 🖂 Pri	int Remittan	ces 📐	< E	lack	Updat	e 🐵



Clicking Yes on the authorisation prompt, open the *Select User* window below where Colin chooses who he'll send the authorisation request to.

🙆 Dataflow Clari	ty [Automatic Pay	ments]									_		\times
						Company	Miles Browr	and Sons & C	D. 🔻	User:	COLIN	CHAPM	AN *
Sales Ledger	Sales Orders	Purchase Le	dger Pi	urchase Orders	s Nom	inal Ledger	Audit	Timesheets	System				
Browse	Cash Autom Payme	atic Allocate Cash	Invoices D	ocument App Store Inv	prove	31 Close Period	Supp Data Lis	lier Transa tings Transa	tional rts∙				
Supplier Accounts	s Transa	ctions	Invo	ice Register	Per	riod Processing	3	Reporting					
How?	-0-1	ndata t	ho nd	Select User	r	- C	x i]					
who?	H(F)	puate t	ne pa	COLIN CHAP	MAN								
what?				JPB									
Cash	Code Name D	Date Reference	Notes B										
					C	ancel 🏈	ок 🎯						
						Email Re	mittances 🛛	Print Remit	tances 📐	< E	Back	Update	•

Once Colin has chosen the authoriser and clicked OK a confirmation dialogue will open.

👌 Dataflow Clarity	y [Automatic Payr	ments]											_		\times
						Co	mpany M	iles Browr	n and So	ons & Co.	-	User:	COLI	N CHAP	AN -
Sales Ledger	Sales Orders	Purchase L	edger	Purchase O	rders	Nominal L	edger	Audit	Times	heets	System				
						31	<u>.</u>				2				
Browse	Cash Automa Paymer	tic Allocate nts Cash	Invoices	Document Store	Approve Invoices	Clo Per	se iod	Supp Data Lis	lier tings -	Transacti Reports	onal s*				
Supplier Accounts	Transac	tions	Ir	nvoice Regist	er	Period Pr	ocessing		Repor	ting					
How?	603														
Who?	1 0	pdate 1	he p	aymen	ts										
What?	-														
Cash	Code Name D	ate Referenc	e Notes	Bank A/c N	ame Curr	ency Rate	Amount								
			Au	itomatic Payr	ments		×								
				(1) Autho	orisation re	quest sent	to JPB								
							ок								
						E	mail Rem	iittances 🛛	Prin	it Remitta	nces 📐	<	Back	Upda	e 🛞



JPB was the chosen authoriser and an email has been sent advising JPB that payments require authorising.

I FILE MESSA	↑ ↓ ∓ Payment Ses	sion Monday, September 21	'20, 3:08pm - M	essage (Plain Text)	?	困 –	□ ×						
ि Ignore Sunk ▼ Delete	Reply Reply Forward E	Allocation rever G To Manager Team Email Team Email	Move	 Mark Unread Categorize ▼ Follow Up ▼ 	aggar and a state	Zoom							
Delete	Respond	Quick Steps 🕞	Move	Tags 🕞	Editing	Zoom	~						
A	on 21/09/2020 15:12 dministrator avment Session Monday, 1	September 21 '20, 3:08	om										
To Ben Pice	ayment bessien mentaly,		P										
We removed out	ra line breaks from this message												
We removed ext	ra nne breaks nom unis message.												
Payment Sessio For company:: N Manual cheque Reference:: REF Payment Date:: Payment Run To	 We removed extra line breaks from this message. Payment Session raised by COLIN CHAPMAN, requires your authorisation. For company:: Miles Brown and Sons & Co. Manual cheque payment Reference:: REF Payment Date:: 21-Sep-2020 settling approved invoice due by:: 21-Sep-2020 Payments will be via bank account:: Payment Run Total:: £ 135,962.78 												
1 See more about A	Administrator.						^						

Once JPB opens the Purchase Ledger Automatic Payments window he'll have the option to authorise Colin's payments.

🙆 Dataflow Clarit	y (Automatic Pay	/ments]	-		-				_	- 🗆	×
					Co	mpany Mil	es Brown a	and Sons	& Co. 🗖	User:	ЈРВ ▼
Sales Ledger	Sales Orders	Purchase L	edger Purcha	ise Orders	Nominal	Ledger	Audit	Timeshe	ets Sy	stem	
Browse	Cash Autom Payme	atic Allocate Cash	Invoices Docur Sto	nent Approve Invoices	C	31 Close eriod	Suppl Data List	lier Tra ings∙ I	ansactional Reports*		
Supplier Accounts	Transa	ctions	Invoice F	Register	Period	Processing		Reporting	g		
How? Who? What?	FR s	elect w	hat you	want to	pay						
Cash	Account Code	Account Nam	e	Payment	🔽 Pay						
	A00001	ACCO Ltd.		£ 511.13							
	LOTTS	Lott and Lott	Rail Services Ltd	£ 135,451.65							
					Tot	al £135	5,962.78				
			Au	thorise ⊘ Re	eject 🕙	Refres	h 🤣 👘	Print 🖪	< Ba	ack Ne	xt >



	. [A												~
C2 Datatiow Clarity	(Automatic Pay	mentsj					_						^
						Co	ompany M	iles Brown	and Sor	ns & Co.	-	User:	JPB ▼
Sales Ledger	Sales Orders	Purchase L	edger Pi	urchase O	rders	Nominal	Ledger	Audit	Times	heets	Systen	ı	
Browse	Cash Autom Paymo	atic Allocate Cash	Invoices D	Document Store	Approve Invoices	P	31 Close eriod	Supp Data Lis	lier tings •	Transact Report	ional ts •		
Supplier Accounts	Transa	ctions	Invo	oice Regis	ter	Period	Processing		Report	ting			
How? Who? What?	FR s	elect w	/hat yo	ou wa	ant to	pay	,						
Cash	Account Code	Account Nam	e		Payment	🖌 Pay							
	A00001	ACCO Ltd.			£ 511.13								
	LOTTS	Lott and Lott	Rail Services	Ltd £ 1	35,451.65								
		00001 ACCO Ltd. £ 511.13 Image: Constraint of the second se											
						Tot	tal £ 13	35,962.78					
				Authori	se 🕜 🛛 Re	eject 🧐	Refres	sh 多	Print 付	1	< Back	Nex	xt >

Once authorised a confirmation dialogue will be displayed for JPB.

An email is then sent back to Colin notifying him that his payments have been authorised. An example email content below:





Once Colin has received notification of authorisation he can login to Clarity, navigate to the *Automatic Payments* window, select the *Session* identified within the subject line of the email and click on the What? section to review which payments have been authorised. Colin may then continue to complete the payment process.

In addition to the Authorise Journals/Payments, Limit amount and Maximum payment columns there's also a *By Company*? parameter column (highlighted in green below).

Tick this parameter if the Journal and Payment authorisation settings only apply to specific companies (if using a multi company system).

Once you've ticked the *By Company*? Parameter double click on the wording *<none>* in the *Companys* column (highlighted in yellow). This will open the *Company Selection* window where you can use the central arrows (highlighted in blue) to move the respective company into the *Selected* section.

Authorisation											_	\times
User ID	Author Journa	rise als?	Limit Amount	Maximum Amount	Authorise Payments?	Limit Amount	Maximum Payment	Authorise Supplier?	By Company	y?	Companys	
COLIN CHAPMAN				£ 0.00			£ 0.00		V		<none></none>	
JAMES SMITH	1	ð	Company Se	lection				- 0	×		<none></none>	
ЈРВ		Avai	lable				<none></none>					
MARK SCHMIDT		Gre	en Retailers	Ltd			<none></none>					
Test		Mile	es Brown and	l Sons & Co.		*					<none></none>	
						•						
	_									-		

Once you've assigned a company they will appear within the *Companys* column (highlighted in green below).

\mathcal{A} Authorisation												-		×
User ID	Author Journa	rise als?	Limit Amount	Maximum Amount	Authorise Payments?	А	Limit mount	Maximum Payment	Authorise Supplier?	By Company	?	Companys		
COLIN CHAPMAN				£ 0.00			1	£ 0.00				Miles Brown	and S	ons & (
JAMES SMITH	1	ð	Company Se	lection					- 0	×		<none></none>		
ЈРВ	1	Avai	lable				Selecte	ed				<none></none>		
MARK SCHMIDT		Gre	vailable Selected Green Retailers Ltd I Miles Brown and Sons & Co.									<none></none>		
Test						*						<none></none>		
						•	i l							
							i l							
•	_										-			•
											-		Clos	e 🔀

Note - the Authorise Supplier? column is currently under development.