



DATAFLOW  
Financial Software Solutions

## ***Requesting Authorisation for 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

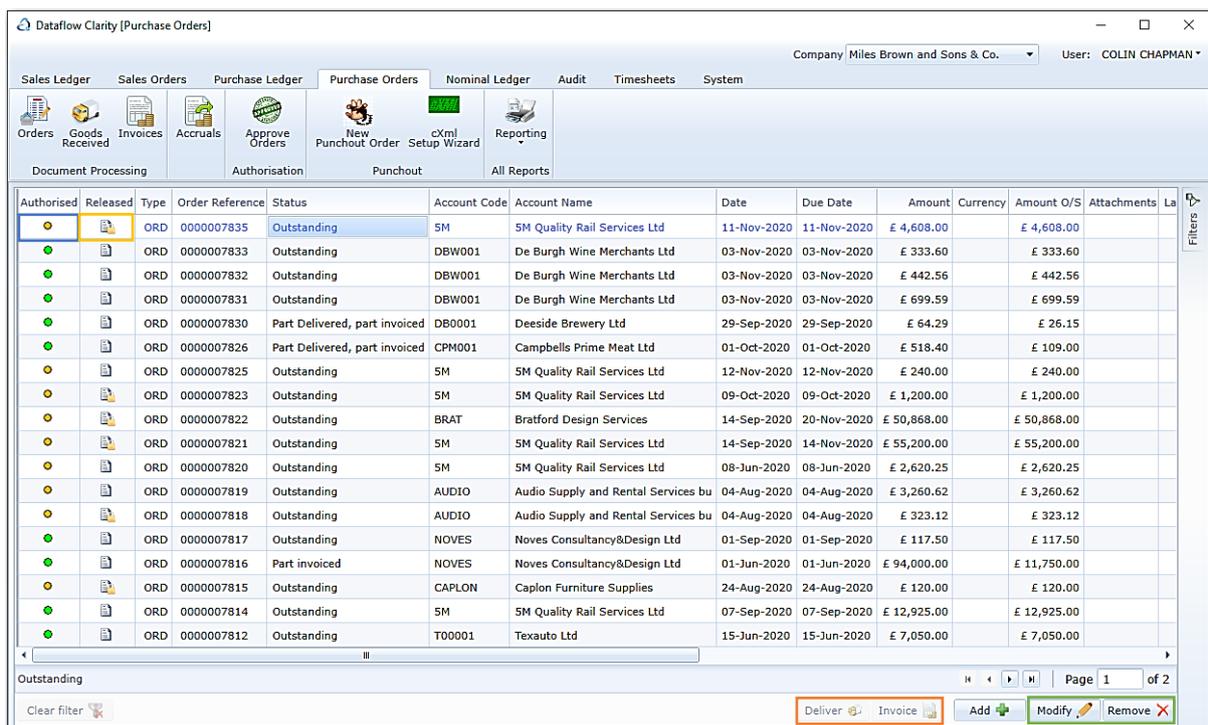


This guide will take you through the process of requesting authorisation for Purchase Orders and Invoices.

Once a Purchase Order has been created Clarity will use the Value/Nominal/Cost Centre to determine who the order authorisation request will be emailed to.

Order 7835 has been created but not yet released. The *Released* status is highlighted below in yellow and the icon displays a padlock symbol to identify it's not yet released. As the document has not yet been released you're still able to modify or remove the document (active *Modify* and *Remove* buttons highlighted below in green).

The Authorised status displays a yellow dot (highlighted below in blue). The yellow dot indicates that the document is awaiting authorisation. As the document has not yet been authorised you're not currently able to *Deliver* or *Invoice* the order (inactive Deliver and Invoice buttons highlighted below in orange).



Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
●	🔒	ORD	000007835	Outstanding	SM	SM Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
●	📄	ORD	000007833	Outstanding	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
●	📄	ORD	000007832	Outstanding	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
●	📄	ORD	000007831	Outstanding	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
●	📄	ORD	000007830	Part Delivered, part invoiced	DB0001	Deeside Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
●	📄	ORD	000007826	Part Delivered, part invoiced	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
●	📄	ORD	000007825	Outstanding	SM	SM Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
●	📄	ORD	000007823	Outstanding	SM	SM Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
●	📄	ORD	000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
●	📄	ORD	000007821	Outstanding	SM	SM Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
●	📄	ORD	000007820	Outstanding	SM	SM Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
●	📄	ORD	000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
●	📄	ORD	000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
●	📄	ORD	000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
●	📄	ORD	000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
●	📄	ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
●	📄	ORD	000007814	Outstanding	SM	SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
●	📄	ORD	000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

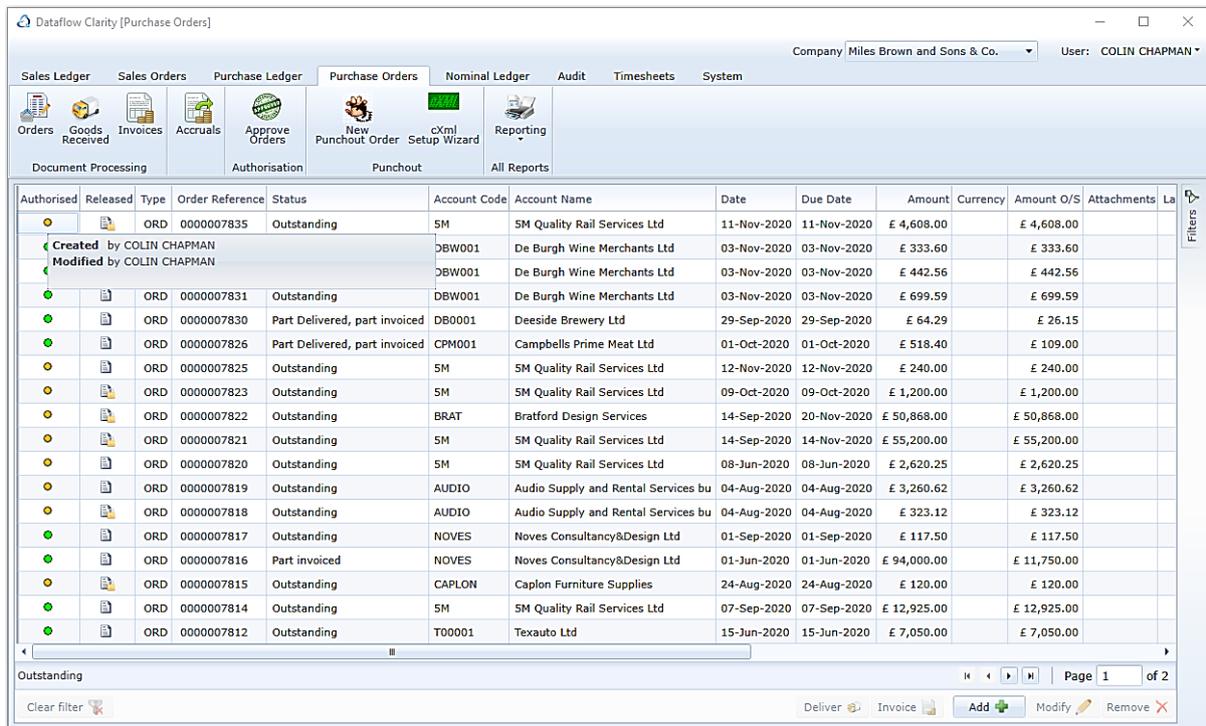
Outstanding

Clear filter

Deliver Invoice Add Modify Remove

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Hovering the mouse over the authorised status dot on the document line displays the document user information and the current authorisation status.



Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
		ORD	000007835	Outstanding	SM	SM Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
Created by COLIN CHAPMAN													
Modified by COLIN CHAPMAN													
					DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
					DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
		ORD	000007831	Outstanding	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
		ORD	000007830	Part Delivered, part invoiced	DB0001	Deeside Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
		ORD	000007826	Part Delivered, part invoiced	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
		ORD	000007825	Outstanding	SM	SM Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
		ORD	000007823	Outstanding	SM	SM Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
		ORD	000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
		ORD	000007821	Outstanding	SM	SM Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
		ORD	000007820	Outstanding	SM	SM Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
		ORD	000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
		ORD	000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
		ORD	000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
		ORD	000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
		ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
		ORD	000007814	Outstanding	SM	SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
		ORD	000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

Prior to releasing the document for authorisation you may view who will receive the authorisation request once the document is released. To view this information right-click on the document line and chose the *Route Authorisation* option highlighted below in green. This will open the *Authorisation Routing* window highlighted in blue.

You may also use this window to control who'll receive the authorisation request. Note that this window displays only the eligible authorisers based upon the document value/Nominal/Cost Centre detail. There may be instances where a document requires more than one authoriser.

Dataflow Clarity [Purchase Orders] Company Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders Goods Received Invoices Accruals Approve Orders New Punchout Order cXml Setup Wizard Reporting

Document Processing Authorisation Punchout All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments
		ORD	0000007835	Outstanding	EM	SM Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00	
		ORD	0000			De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60	
		ORD	0000			De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56	
		ORD	0000			De Burgh Wine Merchants Ltd						
		ORD	0000			Deeside Breweries Ltd			50,000.00			
		ORD	0000			Campbells Primary Products Ltd			50,000.00			
		ORD	0000			SM Quality Rail Services Ltd						
		ORD	0000			SM Quality Rail Services Ltd						
		ORD	0000			Bratford Design Services Ltd						
		ORD	0000			SM Quality Rail Services Ltd						
		ORD	0000			SM Quality Rail Services Ltd						
		ORD	0000			Audio Supply and Services Ltd						
		ORD	0000			Noves Consultancy Ltd						
		ORD	0000			Noves Consultancy Ltd						
		ORD	0000			Caplon Furniture Supplies Ltd	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00	
		ORD	0000			SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00	
		ORD	0000			Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00	

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Clear filter Deliver Invoice Add Modify Remove

Route authorisation

Request authorisation notification

Clear filter

Sum selected cells

Copy to Clipboard

Columns

Window

To request authorisation for the order right-click on the document line and choose the *Release* option highlighted below in green.

Dataflow Clarity [Purchase Orders]

Company: Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders | Goods Received | Invoices | Accruals | Approve Orders | New Punchout Order | cXml Setup Wizard | Reporting

Document Processing | Authorisation | Punchout | All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments
		ORD	0000007835		EM	Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00	
		ORD	0000007835			Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60	
		ORD	0000007835			Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56	
		ORD	0000007835			Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59	
		ORD	0000007835			eside Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15	
		ORD	0000007835			ampbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00	
		ORD	0000007835			Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00	
		ORD	0000007835			Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00	
		ORD	0000007835			atford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00	
		ORD	0000007835			Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00	
		ORD	0000007835			Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25	
		ORD	0000007835			udio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62	
		ORD	0000007835			udio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12	
		ORD	0000007835			oves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50	
		ORD	0000007835			oves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00	
		ORD	0000007835			aplom Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00	
		ORD	0000007835			Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00	
		ORD	0000007835			axauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00	

Outstanding

Clear filter

Release 0000007835

Route authorisation

Request authorisation notification

Clear filter

Sum selected cells

Copy to Clipboard

Columns

Window

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Deliver Invoice Add Modify Remove

Once the order's been released Clarity will automatically email an authorisation request to the chosen authoriser(s). Notice that the padlock has now disappeared off the *Released* status icon (highlighted below in yellow). If you now hover the mouse cursor over the dot in the *Authorised* column (highlighted below in blue) you will notice additional information has been added to the authorisation status of that document.

Also note that now the document has been released for authorisation the *Modify* and *Remove* buttons are now inactive for this document (highlighted below in green).

Dataflow Clarity [Purchase Orders] Company Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders Goods Received Invoices Accruals Approve Orders New Punchout Order CXml Setup Wizard Reporting

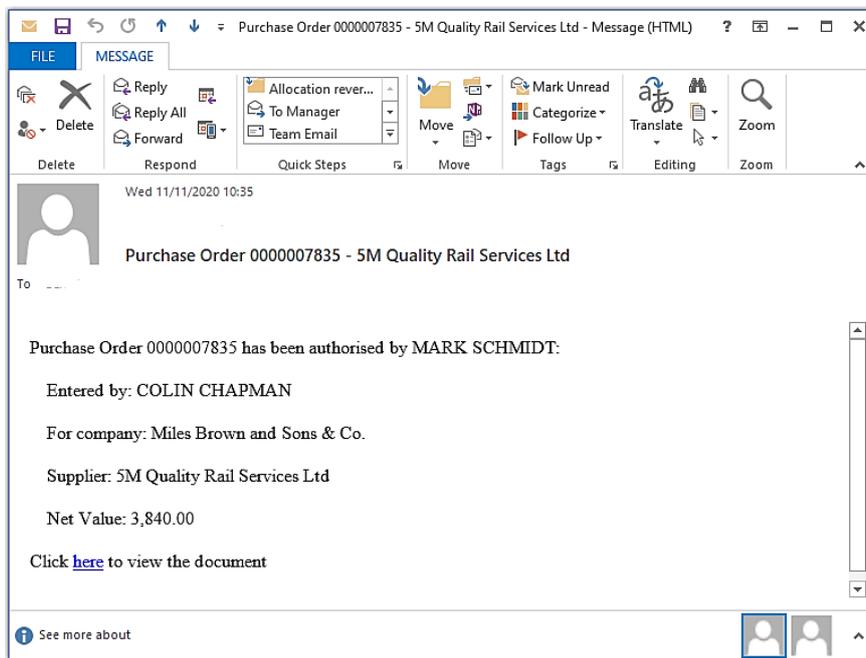
Document Processing Authorisation Punchout All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments
		ORD	0000007835	Outstanding	SM	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00	
<p>Created by COLIN CHAPMAN</p> <p>Modified by COLIN CHAPMAN</p> <p>Released on 11-Nov-2020</p> <p>Waiting for MARK SCHMIDT</p> <p>JAMES SMITH</p> <p><b>You will be notified when the order has been authorised</b></p>												
		ORD	0000007826	Part Delivered, part invoiced	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00	
		ORD	0000007825	Outstanding	SM	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00	
		ORD	0000007823	Outstanding	SM	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00	
		ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00	
		ORD	0000007821	Outstanding	SM	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00	
		ORD	0000007820	Outstanding	SM	5M Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25	
		ORD	0000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62	
		ORD	0000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12	
		ORD	0000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50	
		ORD	0000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00	
		ORD	0000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00	
		ORD	0000007814	Outstanding	SM	5M Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00	
		ORD	0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00	

Outstanding Page 1 of 2

Deliver Invoice Add Modify Remove

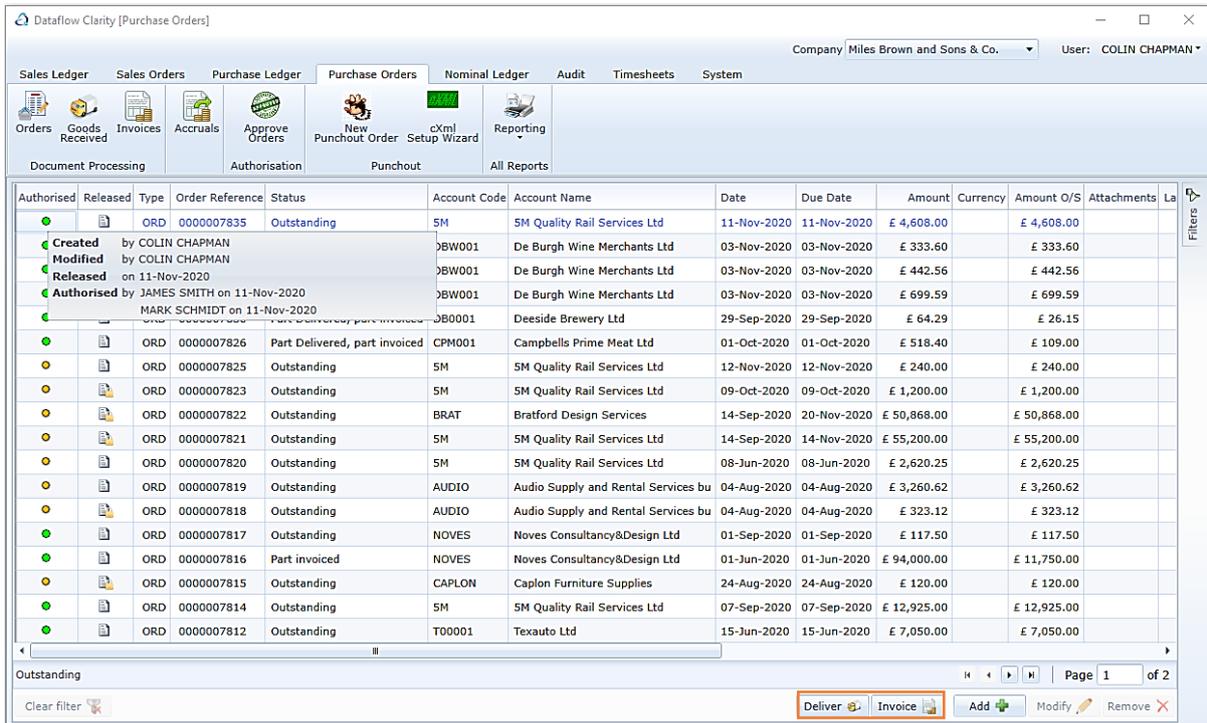
Once the document has been authorised the authorisation requestor will receive an email notification confirmation that the document has now been authorised. An example of this email below:



Document 7835 has now been authorised. The colour of the dot within the *Authorisation* column changes from yellow (pending authorisation) to green (authorised). If you hover the mouse cursor over the green dot the authorisation status information displays the updated information.

As the document is now authorised the *Deliver* and *Invoice* buttons are now active (highlighted below in orange), allowing you to progress the document to either of those stages.

The *Modify* and *Remove* options are not available due to the document being both released and authorised.



Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments
●	●	ORD	000007835	Outstanding	SM	SM Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00	£	£ 4,608.00	
Created by COLIN CHAPMAN Modified by COLIN CHAPMAN on 11-Nov-2020 Released on 11-Nov-2020 Authorised by JAMES SMITH on 11-Nov-2020 Authorised by MARK SCHMIDT on 11-Nov-2020												
●	●	ORD	000007826	Part Delivered, part invoiced	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40	£	£ 109.00	
●	●	ORD	000007825	Outstanding	SM	SM Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00	£	£ 240.00	
●	●	ORD	000007823	Outstanding	SM	SM Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00	£	£ 1,200.00	
●	●	ORD	000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00	£	£ 50,868.00	
●	●	ORD	000007821	Outstanding	SM	SM Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00	£	£ 55,200.00	
●	●	ORD	000007820	Outstanding	SM	SM Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25	£	£ 2,620.25	
●	●	ORD	000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62	£	£ 3,260.62	
●	●	ORD	000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12	£	£ 323.12	
●	●	ORD	000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50	£	£ 117.50	
●	●	ORD	000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00	£	£ 11,750.00	
●	●	ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00	£	£ 120.00	
●	●	ORD	000007814	Outstanding	SM	SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00	£	£ 12,925.00	
●	●	ORD	000007812	Outstanding	TO001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00	£	£ 7,050.00	

Outstanding

Clear filter

Deliver Invoice Add Modify Remove

Should changes to the Order be required after the document has been released and authorised you will need to reset the *Released* status by right-clicking on the document and choosing the option to *Hold* (highlighted below in green)

Dataflow Clarity [Purchase Orders] Company Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders Goods Received Invoices Accruals Approve Orders New Punchout Order cXml Setup Wizard Reporting

Document Processing Authorisation Punchout All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
		ORD	0000007835	Outstanding		vices Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
		ORD	0000007833	Outstanding		vices Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
		ORD	0000007832	Outstanding		vices Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
		ORD	0000007831	Outstanding		vices Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
		ORD	0000007830	Part Delivered		vices Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
		ORD	0000007826	Part Delivered		vices Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
		ORD	0000007825	Outstanding		vices Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
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		ORD	0000007822	Outstanding		vices Ltd	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
		ORD	0000007821	Outstanding		vices Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
		ORD	0000007820	Outstanding		vices Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
		ORD	0000007819	Outstanding		rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
		ORD	0000007818	Outstanding		rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
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		ORD	0000007816	Part Invoiced		&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
		ORD	0000007815	Outstanding		pplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
		ORD	0000007814	Outstanding		vices Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
		ORD	0000007812	Outstanding		vices Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

Outstanding Page 1 of 2

Clear filter

Deliver Invoice Add Modify Remove

Having held the document, you will see that the padlock symbol has returned to the *Released* and the *Authorised* dot colour has reverted back to yellow. Also note that the *Modify* and *Remove* options are now active for this document (highlighted below in green).

Dataflow Clarity [Purchase Orders] Company Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

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		ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
		ORD	0000007821	Outstanding	SM	SM Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
		ORD	0000007820	Outstanding	SM	SM Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
		ORD	0000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
		ORD	0000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
		ORD	0000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
		ORD	0000007816	Part Invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
		ORD	0000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
		ORD	0000007814	Outstanding	SM	SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
		ORD	0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

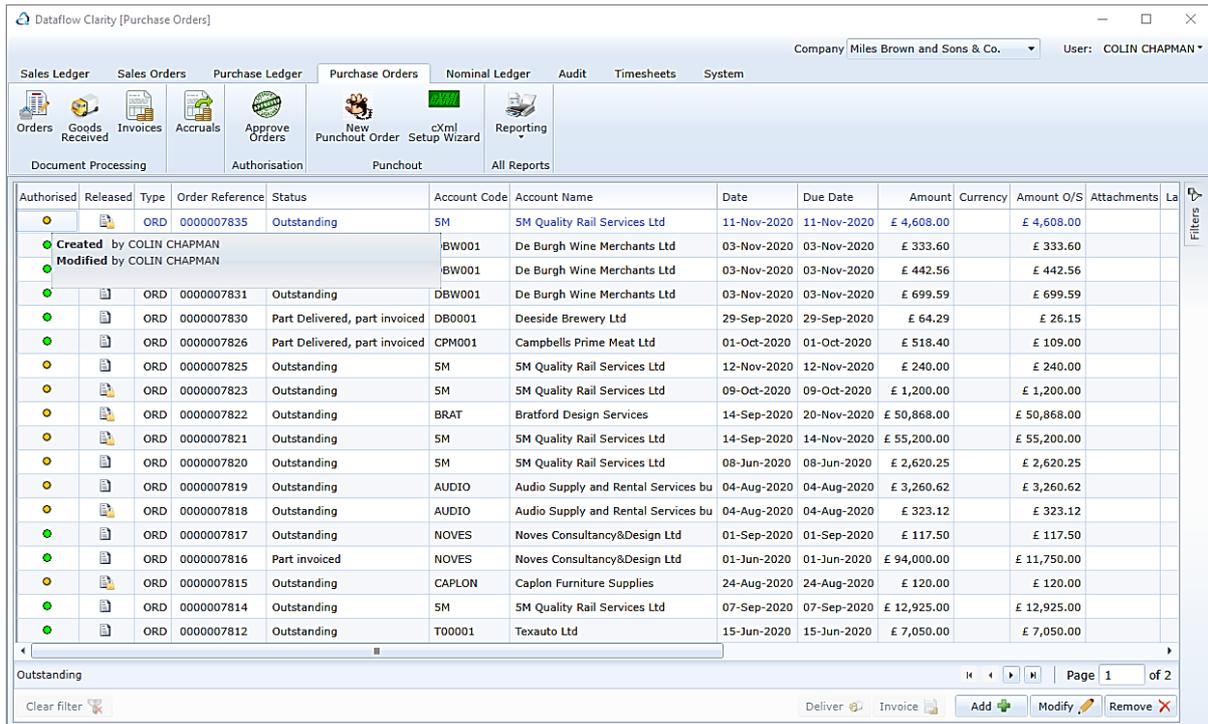
Outstanding Page 1 of 2

Clear filter

Deliver Invoice Add **Modify** **Remove**

Setting the document to Held reverts the authorisation status to unauthorised. Hovering the mouse cursor over the yellow dot in the *Authorised* column will show the new authorisation status information (see image below). Note that the previously displayed authorisation information has been removed.

At this point amendments may be made to the order and the order resent for authorisation. To resend the order for authorisation simply release the order using the right click option as before. The same authorisation process described above is repeated.



Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
●	📄	ORD	0000007835	Outstanding	SM	SM Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
● Created by COLIN CHAPMAN					BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
● Modified by COLIN CHAPMAN					BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
●	📄	ORD	0000007831	Outstanding	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
●	📄	ORD	0000007830	Part Delivered, part invoiced	DB0001	Deeside Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
●	📄	ORD	0000007826	Part Delivered, part invoiced	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
●	📄	ORD	0000007825	Outstanding	SM	SM Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
●	📄	ORD	0000007823	Outstanding	SM	SM Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
●	📄	ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
●	📄	ORD	0000007821	Outstanding	SM	SM Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
●	📄	ORD	0000007820	Outstanding	SM	SM Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
●	📄	ORD	0000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
●	📄	ORD	0000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
●	📄	ORD	0000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
●	📄	ORD	0000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
●	📄	ORD	0000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
●	📄	ORD	0000007814	Outstanding	SM	SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
●	📄	ORD	0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

If the document has been released but it's neither been approved or rejected you can resend the document for authorisation manually by using the right-click *Send authorisation request* option highlighted below in green. Clarity will send new authorisation email requests to the eligible authorisers.

Dataflow Clarity [Purchase Orders] Company Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders Goods Received Invoices Accruals Approve Orders New Punchout Order cXml Setup Wizard Reporting

Document Processing Authorisation Punchout All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments
●		ORD	0000007835	Refresh		Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00	
●		ORD	0000007833	New punch out order		burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60	
●		ORD	0000007832	Quick order		burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56	
●		ORD	0000007831	Copy order		burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59	
●		ORD	0000007826	Add Order		ide Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15	
●		ORD	0000007825	Modify Order		pbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00	
●		ORD	0000007823	Remove Order		Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00	
●		ORD	0000007823	Complete Order		Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00	
●		ORD	0000007822	View Order		ord Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00	
●		ORD	0000007821	View scanned documents		Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00	
●		ORD	0000007820	Attach scanned document		Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25	
●		ORD	0000007819	Preview order 0000007835		Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62	
●		ORD	0000007818	Download order 0000007835 for final print		Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12	
●		ORD	0000007817	Email order 0000007835 to supplier		s Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50	
●		ORD	0000007816	Print/Email current range		s Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00	
●		ORD	0000007815	Deliver 0000007835		on Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00	
●		ORD	0000007814	Invoice 0000007835		Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00	
●		ORD	0000007812	Hold 0000007835		uto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00	

Outstanding

Clear filter

Deliver Invoice Add Modify Remove

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Should the authorisation request be rejected the dot within the *Authorised* column will change from yellow to red (highlighted below in yellow). The authorisation information displayed when hovering the mouse over the authorisation dot reflects the change in status and the reason for authorisation rejection.

Dataflow Clarity [Purchase Orders]

Company: Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders | Goods Received | Invoices | Accruals | Approve Orders | New Punchout Order | CxMl Setup Wizard | Reporting

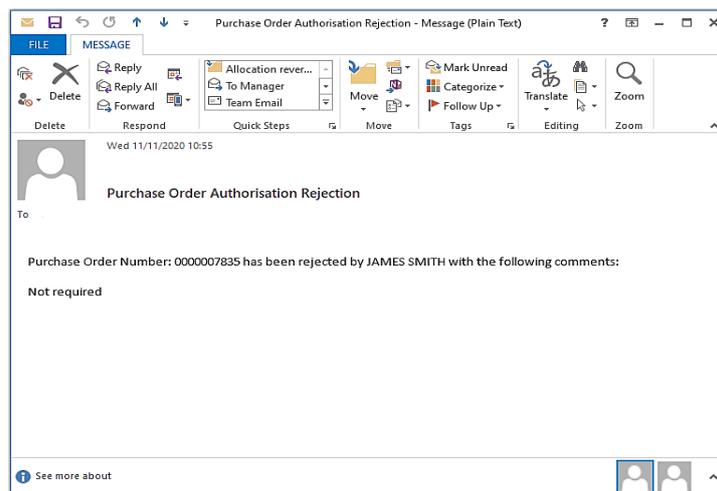
Document Processing | Authorisation | Punchout | All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
		ORD	000007835	Outstanding	SM	SM Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
<p>Created by COLIN CHAPMAN</p> <p>Modified by COLIN CHAPMAN</p> <p>Released on 11-Nov-2020</p> <p>Rejected by JAMES SMITH on 11-Nov-2020</p> <p><b>You will be notified when the order has been authorised</b></p> <p>Rejected by JAMES SMITH 11 Nov 2020 10:54:33</p> <p>Not required</p>													
		ORD	000007825	Outstanding	SM	SM Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
		ORD	000007823	Outstanding	SM	SM Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
		ORD	000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
		ORD	000007821	Outstanding	SM	SM Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
		ORD	000007820	Outstanding	SM	SM Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
		ORD	000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
		ORD	000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
		ORD	000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
		ORD	000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
		ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
		ORD	000007814	Outstanding	SM	SM Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
		ORD	000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

Outstanding | Page 1 of 2

Clear filter | Deliver | Invoice | Add | Modify | Remove

The authorisation requester will also receive an email advising them that the request has been rejected and the reason for rejection. An example of this email below:



If for any reason it's decided that a document with a rejected authorisation status is to be re-routed for authorisation again simply right-click and *Hold* the document (highlighted below in green) to reset the release status to not released (padlock symbol). When the document's status is set to not released you're able to carry out any necessary changes to the document using the *Modify* button. Right-click and chose the option to *Release* the document to re-send the document for authorisation.

Dataflow Clarity [Purchase Orders] Company Miles Brown and Sons & Co. User: COLIN CHAPMAN

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

Orders Goods Received Invoices Accruals Approve Orders New Punchout Order cXml Setup Wizard Reporting

Document Print Authorisation Punchout All Reports

Authorised	Released	Type	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
		ORD	0000007835	Outstanding	5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
		ORD	0000007833	Outstanding		nts Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
		ORD	0000007832	Outstanding		nts Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
		ORD	0000007831	Outstanding		nts Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
		ORD	0000007830	Part Delivered			29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
		ORD	0000007826	Part Delivered		Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
		ORD	0000007825	Outstanding		s Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
		ORD	0000007823	Outstanding		s Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
		ORD	0000007822	Outstanding		is	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
		ORD	0000007821	Outstanding		s Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
		ORD	0000007820	Outstanding		s Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
		ORD	0000007819	Outstanding		al Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
		ORD	0000007818	Outstanding		al Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
		ORD	0000007817	Outstanding		sign Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
		ORD	0000007816	Part invoiced		sign Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
		ORD	0000007815	Outstanding		es	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
		ORD	0000007814	Outstanding		s Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
		ORD	0000007812	Outstanding			15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		

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Clear filter Deliver Invoice Add Modify Remove

- Hold 0000007835
- Request authorisation notification
- Clear filter
- Sum selected cells
- Copy to Clipboard
- Columns
- Window