



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

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).

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Authorised	Released	Туре	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La 🕏
•	B	ORD	000007835	Outstanding	5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		ilters
۰		ORD	000007833	Outstanding	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
•		ORD	0000007832	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	0000007825	Outstanding	5M	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		_
•	<u>E</u>	ORD	0000007823	Outstanding	5M	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
•	<u>E</u>	ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		_
•	<u>E</u>	ORD	0000007821	Outstanding	5M	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	0000007820	Outstanding	5M	5M 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		
•	<u>a</u>	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		_
•	<u>a</u>	ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	000007814	Outstanding	5M	5M 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		
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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.

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Authorise	d Released	Туре	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La 🕏
•	<u>a</u>	ORD	000007835	Outstanding	5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		Here.
(Cre	ated by Co	DLIN CI	HAPMAN		DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		u u
(Mor	lified by C	JLIN CI	HAPMAN		DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
٠		ORD	0000007831	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	0000007825	Outstanding	5M	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
•	<u> 1</u>	ORD	0000007823	Outstanding	5M	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
•	<u> </u>	ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
•	<u> 1</u>	ORD	0000007821	Outstanding	5M	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	000007820	Outstanding	5M	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		
•	<u>a</u>	ORD	000007818	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	000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
•	<u>a</u>	ORD	0000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	0000007814	Outstanding	5M	5M Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
۰		ORD	0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
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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.



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0	E <u>n</u>	ORD	0000	007	2E Outota	ndina	EM	5M Quality Rail	Services Ltd	11-Nov-3	020 11-Nov-2020	£ 4,608.00		£ 4,608.00		tare
•		ORD	0000	3	Refresh			De Burgh Wine	Merchants Ltd	03-Nov-	020 03-Nov-2020	£ 333.60		£ 333.60		ŭ
•		ORD	0000	×,	New punch o	ut order		De Burgh Wine	Merchants Ltd	03-Nov-3	020 03-Nov-2020	£ 442.56		£ 442.56		
۰		ORD	0000		Quick order			De Burgh Wine	Authorisation F	Routing					<	
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۰		ORD	0000	4	Add Order			Campbells Prim	JAMES SMITH		50,000,	000 JAMES	SMITH			
•		ORD	0000	1	Modify Order			5M Quality Rail								
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•	<u>P</u>	ORD	0000	0				5M Quality Rail								
•		ORD	0000	~	view Order			5M Quality Rail								
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•		ORD	0000	3	Print/Email c	urrent range		5M Quality Rail	Services Ltd	07-Sep-	020 07-Sep-2020	£ 12,925.00		£ 12,925.00		
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To request authorisation for the order right-click on the document line and choose the *Release* option highlighted below in green.



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Sales Led	ger Sa	les Ord	ers Pu	chase	Ledger	Purchase Orders	Nominal Lee	dger	Audit	Timesheets	System						
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•		ORD	0000007	875	Outota	ndina	EM	EМ	Quality Ra	il Services Ltd	11-Nov-202	0 11-Nov-2020	£ 4,608.00		£ 4,608.00		ters
•		ORD	0000007	3: ち	Refresh	1		e I	Burgh Win	e Merchants Ltd	03-Nov-202	03-Nov-2020	£ 333.60		£ 333.60		
•		ORD	0000007	3: 3 ,	New pu	inch out order		e l	Burgh Win	e Merchants Ltd	03-Nov-202	03-Nov-2020	£ 442.56		£ 442.56		_
٠		ORD	0000007	8	Quick o	rder		e i	Burgh Win	e Merchants Ltd	03-Nov-202	03-Nov-2020	£ 699.59		£ 699.59		
•		ORD	0000007	3: 📭	Сору о	rder		ee	side Brew	ery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
•		ORD	0000007	3: _	Add On	dor		эп	npbells Pri	me Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
•		ORD	0000007	3: 🦕	Modify	Order		4	Quality Ra	il Services Ltd	12-Nov-202	12-Nov-2020	£ 240.00		£ 240.00		
•		ORD	0000007	в: 🋴	Remov	e Order		4	Quality Ra	il Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
•	<u> </u>	ORD	0000007	в: ^	Comple	te Order		a	tford Desig	n Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
•	<u> 1</u>	ORD	0000007	в:	- compie			4	Quality Ra	il Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	0000007	в: 🌂	View O	rder		4	Quality Ra	il Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
•		ORD	0000007	3 🚔	View so	anned documents		bu	lio Supply	and Rental Services	04-Aug-202	04-Aug-2020	£ 3,260.62		£ 3,260.62		
•	<u>a</u>	ORD	0000007	3: 🌥	Attach	scanned document		bu	lio Supply	and Rental Services	04-Aug-202	04-Aug-2020	£ 323.12		£ 323.12		
•		ORD	000007	B: 🗳	Preview	r order 0000007835		ov	es Consult	tancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
•		ORD	000007	B: 🖾	Downlo	ad order 0000007835	for final print	ov	es Consult	tancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
•	<u>a</u>	ORD	000007	B: 🖂	Email o	rder 0000007835 to s	upplier	эр	olon Furnite	ure Supplies	24-Aug-202	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	000007	B: 🖨	Print/E	mail current range		4	Quality Ra	il Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
•		ORD	0000007	B: 👘	Deliver	000007835		×	auto Ltd		15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
•					Invoice	0000007835											•
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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).



🙆 Dat	taflow Clarity [P	urchase	Orders]									- 0	×
								Company Miles	Brown and So	ons & Co.	 User 	: COLIN CHA	PMAN *
Sales	Ledger Sa	les Ord	ers Purchase	Ledger Purchase Orders	Nominal Le	lger Audit Timesheets Sy	stem						
	<u>a</u>			a 🕺	a.a.t								
Orders	Goods In	voices	Accruals Ap	prove New	cXml Re	porting							
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Doc	ument Process	ing	Autho	prisation Punchout	All	Reports							
Autho	rised Released	Туре	Order Reference	e Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La 🗞
0		ORD	0000007835	Outstanding	5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		Iters
•	Created by C	OLIN C	HAPMAN		DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		μ.
	Released on 1	1-Nov-	пармал 2020		DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
	Waiting for I	MARK S	CHMIDT		DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
	You will be no	DAMES :	SMITH when the order	has been authorised	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		
0		ORD	0000007825	Outstanding	5M	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
0		ORD	0000007823	Outstanding	5M	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
0	<u>B</u>	ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
0		ORD	0000007821	Outstanding	5M	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
0		ORD	0000007820	Outstanding	5M	5M Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
0		ORD	0000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
0		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		
0	<u>B</u>	ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•	B	ORD	0000007814	Outstanding	5M	5M Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
0		ORD	0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
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Clear	r filter 📡							Deliver 🚯	Invoice 🔛	Add 🚽	Modify 🥖	Remove >	×
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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:

Image: I	îE ↓ + F	Purchase Order 0000007835 ·	- 5M Quality Rai	l Services Ltd - Mess	age (HTML) 🦷	· 🗹 – 🗆	×
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Delete	Respond	Quick Steps 🕞	Move	Tags 🕞	Editing	Zoom	^
To	d 11/11/2020 10:	³⁵ • 0000007835 - 5M Qu	ality Rail Se	vices Ltd			
Purchase Order	0000007835	has been authorised by	MARK SCI	IMIDT:			
Entered by: 0	COLIN CHAI	PMAN					
For company	Miles Brown	and Sons & Co.					
Supplier: 5M	Quality Rail S	Services Ltd					
Net Value: 3,	840.00						
Click <u>here</u> to vie	ew the docum	lent					•
See more about							^



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.

👌 Dataflow	v Clarity [Pu	urchase	Orders]									- 0	×
							(Company Miles	Brown and So	ons & Co.	 User 	COLIN CHA	PMAN *
Sales Ledg	er Sa	les Orde	ers Purchase	Ledger Purchase Orders	Nominal Le	dger Audit Timesheets Sy	stem						
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Authorised	Released	Туре	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La 🏷
•	E	ORD	000007835	Outstanding	5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		ilters
Crea	ated by	COLIN	CHAPMAN		0BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
Rele	eased or	n 11-No	v-2020		0BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
C Aut	horised by	/ JAMES	SMITH on 11-No	ov-2020	0BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
۰.		MARK	SCHMIDT on 11-	Nov-2020	.)B0001	Deeside Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
۰		ORD	0000007826	Part Delivered, part invoiced	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
•		ORD	0000007825	Outstanding	5M	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
•	<u>a</u>	ORD	0000007823	Outstanding	5M	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
•	<u>a</u>	ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
•	<u>a</u>	ORD	0000007821	Outstanding	5M	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	000007820	Outstanding	5M	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		
0	<u>E</u>	ORD	0000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
۰		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		
•	<u>B</u>	ORD	000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	000007814	Outstanding	5M	5M Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
٠		ORD	0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
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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)



👌 Datafle	w Clarity [Pu	irchase	e Orders]													- 0	×
												Company Miles	Brown and Se	ons & Co.	▼ User	r: COLIN CHA	APMAN
Sales Leo	lger Sal	es Ord	lers Purchase	Ledger	Purc	hase Orders	Nomin	al Ledger	Audit	Timesheets S	/stem						
Orders R	Goods Invectived	oices	Accruals App	prove ders P	Nuncho	lew Jut Order Set	cXml tup Wizard	Reporting									
Docum	ent Processi	ng	Autho	risation		Punchout		All Reports									
Authorise	d Released	Туре	Order Reference	Status			Account	Code Accour	nt Name		Date	Due Date	Amount	Currency	Amount O/S	Attachments	La 🕏
•		ORD	0000007835	Outstand	lin 😞	Refresh				vices Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		Iters
•		ORD	0000007833	Outstand	lin 🦕					chants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
•		ORD	0000007832	Outstand	lin 🦏	New punch	out order			chants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
•		ORD	0000007831	Outstand	lin 🗈	Quick order				chants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
•		ORD	000007830	Part Deliv	ve 🗈	Copy order				:d	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
•		ORD	0000007826	Part Deliv	ve 👍	Add Order				eat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
•		ORD	0000007825	Outstand	lin 🥖	Modify Orde	er			vices Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
•	<u>B</u>	ORD	0000007823	Outstand	lin \times	Remove Ore	der			vices Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
•		ORD	0000007822	Outstand	lin	Complete O	rder			rvices	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
•	<u></u>	ORD	0000007821	Outstand	lin 👝	View Order				vices Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	0000007820	Outstand	lin 🔊	View scann	ed docume	ots		vices Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
•		ORD	0000007819	Outstand	lin 🗽	Attach scan	ned docum	hent		tental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
•		ORD	0000007818	Outstand	lin					tental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
•		ORD	0000007817	Outstand	lin 🗳	Preview ord	ler 000000	7835		&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
•		ORD	0000007816	Part invoi	ic 🎽	Download o	rder 00000	007835 for fi	nal print	&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
•	<u></u>	ORD	0000007815	Outstand	lin 🞽	Email order	00000078	35 to supplie	er	upplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	0000007814	Outstand	lin 🎒	Print/Email	current rar	nge		vices Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
•		ORD	0000007812	Outstand	lin 🤨	Deliver 000	0007835				15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
•						Invoice 000	0007835										•
Outstandi	ng				Ð	Hold 00000	07835			7				H H	н Pag	je 1 of	f 2
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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).

🙆 Dataf	low Clarity [P	urchase	Orders]												- 0	>
											Company Miles	Brown and Se	ons & Co.	▼ Use	r: COLIN CH	APMAN
Sales Le	edger Sa	les Ord	ers Purcha	ise Ledger	Purchase Orders	Nominal L	edger	Audit	Timesheets	System						
Orders	Goods Inv Received	voices	Accruals A	Approve Orders	New Punchout Order Setu	cXml R up Wizard	eporting									
Docur	ment Processi	ing	Aut	thorisation	Punchout	A	Reports									
Authoris	ed Released	Туре	Order Referer	nce Status		Account Cod	e Accour	it Name		Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
0		ORD	0000007835	Outstar	ıding	5M	5M Qu	ality Rail	Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
۰		ORD	000007833	Outstar	ıding	DBW001	De Bur	gh Wine	Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
•		ORD	000007832	Outstar	ıding	DBW001	De Bur	gh Wine	Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
۰		ORD	000007831	Outstar	ıding	DBW001	De Bur	gh Wine	Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
•		ORD	000007830	Part De	livered, part invoiced	DB0001	Deesid	e Brewe	ry Ltd	29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
•		ORD	000007826	Part De	livered, part invoiced	CPM001	Campb	ells Prin	ne Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
0		ORD	000007825	Outstar	ıding	5M	5M Qu	ality Rail	Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
0	<u></u>	ORD	000007823	Outstar	nding	5M	5M Qu	ality Rail	Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
0	<u>E</u>	ORD	0000007822	Outstar	ıding	BRAT	Bratfor	d Desigr	n Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
0	<u></u>	ORD	000007821	Outstar	nding	5M	5M Qu	ality Rail	Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
0		ORD	000007820	Outstar	ıding	5M	5M Qu	ality Rail	Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
0		ORD	000007819	Outstar	ıding	AUDIO	Audio	Supply a	nd Rental Services	bu 04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
0	<u>a</u>	ORD	000007818	Outstar	ıding	AUDIO	Audio :	Supply a	nd Rental Services	bu 04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
۰		ORD	000007817	Outstar	ıding	NOVES	Noves	Consulta	ancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
۰		ORD	000007816	Part inv	roiced	NOVES	Noves	Consulta	ancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
0	<u></u>	ORD	000007815	Outstar	ıding	CAPLON	Caplon	Furnitu	re Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
۰		ORD	0000007814	Outstar	ıding	5M	5M Qu	ality Rail	Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
۰		ORD	0000007812	Outstar	ıding	T00001	Texaut	o Ltd		15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
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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.

🙆 Datafi	ow Clarity [Pi	urchase	Orders]									- 0	×
								Company Miles	Brown and So	ns & Co.	 User 	COLIN CHA	PMAN *
Sales Le	dger Sal	es Ord	ers Purchase	Ledger Purchase Orders	Nominal Le	dger Audit Timesheets Sy	stem						
	@			e 🕷 🖉	0X66L								
Orders	Goods Inv	roices	Accruals App	rove New	cXml Re	porting							
	leceiveu		UN .	iers Functiout Order Set	up wizaru								
Docum	ent Processi	ng	Autho	risation Punchout	All	Reports		1	1				
Authoris	ed Released	Туре	Order Reference	Status	Account Code	Account Name	Date	Due Date	Amount	Currency	Amount O/S	Attachments	La 🗞
•		ORD	000007835	Outstanding	5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		ilter
• Ci	reated by C		CHAPMAN		BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
•	ounieu by c		, MAPMAN		BW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		_
•	1	ORD	0000007831	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	0000007825	Outstanding	5M	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		_
•	<u></u>	ORD	0000007823	Outstanding	5M	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
•	<u>B</u>	ORD	0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
•		ORD	0000007821	Outstanding	5M	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	0000007820	Outstanding	5M	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		
•	<u> </u>	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		
•	<u> 1</u>	ORD	0000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	0000007814	Outstanding	5M	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		
•													•
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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.



👌 Datafl	ow Clarity [P	urchase	Orders]														- 0	:
												(Company Miles	Brown and So	ons & Co.	 Use 	r: COLIN CH	АРМА
Sales Le	dger Sa	les Ord	ers Pu	ırchase	Ledg	ger Purchase Orders	Nominal L	edger	Audit	t Timesheets	Sy	stem						
Ð	6			e		8	olati											
Orders	Goods In Received	voices	Accruals	App Or	prove	New Punchout Order Set	cXml F up Wizard	Reportir	g									
Docun	nent Process	ing		Autho	orisati	ion Punchout	A	ll Repor	ts									
Authoris	ed Released	Туре	Order Re	ference	e Sta	itus	Account Cod	le Acco	unt Nam	ie		Date	Due Date	Amount	Currency	Amount O/S	Attachments	La
0		ORD	0000007	7835	-		F 14		Juality Ra	ail Services Ltd		11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		
۰		ORD	0000007	7833	5 F	Refresh			urgh Wir	ne Merchants Ltd		03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		
۰		ORD	0000007	7832	∛ 1 №	New punch out order			urgh Wir	ne Merchants Ltd		03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
۰		ORD	0000007	7831		Quick order			urgh Wir	ne Merchants Ltd		03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
۰		ORD	0000007	7830	• o	Copy order			ide Brew	very Ltd		29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
۰		ORD	0000007	7826		Add Order			obells Pri	ime Meat Ltd		01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
0		ORD	0000007	7825	/	Nodify Order			uality Ra	ail Services Ltd		12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
0	<u>a</u>	ORD	0000007	7823	×F	Remove Order			uality Ra	ail Services Ltd		09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00		
0	<u>a</u>	ORD	0000007	7822		Complete Order			ord Desi	ign Services		14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00		
0	<u> 1</u>	ORD	0000007	7821		6 0-d			uality Ra	ail Services Ltd		14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
0		ORD	0000007	7820		view Order			uality Ra	ail Services Ltd		08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
0		ORD	0000007	7819		view scanned documents			o Supply	and Rental Servi	es bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
0	<u> </u>	ORD	0000007	7818	× ^	Attach scanned document			Supply	and Rental Servi	es bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
۰		ORD	0000007	7817	۹ <mark>ک</mark>	Preview order 0000007835	5		s Consul	ltancy&Design Ltd		01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
۰		ORD	0000007	7816 I	<u>ک</u>	Download order 00000078	35 for final p	rint	s Consul	ltancy&Design Ltd		01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
0	<u> 1</u>	ORD	0000007	7815	Z	Email order 0000007835 t	o supplier		on Furnit	ture Supplies		24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
۰		ORD	0000007	7814	3 F	Print/Email current range			uality Ra	ail Services Ltd		07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
۰		ORD	0000007	7812	<u>ی</u>	Deliver 0000007835			uto Ltd			15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
•					I I	Invoice 0000007835												•
Outstand	ling				э. н	Hold 0000007835									14 4	Pag	ge 1 of	<i>i</i> 2
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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.



ders Good Receive Document Pr thorised Rel Created Modifiee	ds y COLIN d by COLIN ed on 11-Nov	e Order Reference 0 000007835 CHAPMAN	Punchout Order Set: Punchout Order Set: Punchout	cXml up Wizard All Account Code	Porting Reports Account Name			1			
Created Modified	eleased Type ORI d by COLIN ed by COLIN ed on 11-Nov	Order Reference 0 000007835 CHAPMAN	Status Outstanding	Account Code	Account Name			1		1	
Created Modified	d by COLIN d by COLIN ed by COLIN ed on 11-Nov	D 0000007835 CHAPMAN	Outstanding			Date	Due Date	Amount Cu	rrency Amount O/S	Attachments	La
Created Modified	d by COLIN ed by COLIN ed on 11-Nov	CHAPMAN		5M	5M Quality Rail Services Ltd	11-Nov-2020	11-Nov-2020	£ 4,608.00	£ 4,608.00		
Modified	ed by COLIN ed on 11-Nov			DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 333.60	£ 333.60		-1
Release.	cu on in ino	CHAPMAN		DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 442.56	£ 442.56		
Rejected	ed by JAMES	SMITH on 11-Nov	-2020	DBW001	De Burgh Wine Merchants Ltd	03-Nov-2020	03-Nov-2020	£ 699.59	£ 699.59		
You will	II be notified	d when the order	has been authorised	DB0001	Deeside Brewery Ltd	29-Sep-2020	29-Sep-2020	£ 64.29	£ 26.15		
Not requi	uired	50110 11 100 2020	10:34:35	CPM001	Campbells Prime Meat Ltd	01-Oct-2020	01-Oct-2020	£ 518.40	£ 109.00		
•	CRI ORI	D 0000007825	Outstanding	5M	5M Quality Rail Services Ltd	12-Nov-2020	12-Nov-2020	£ 240.00	£ 240.00		
•	CRI ORI	D 0000007823	Outstanding	5M	5M Quality Rail Services Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00	£ 1,200.00		
•	Der Ori	D 0000007822	Outstanding	BRAT	Bratford Design Services	14-Sep-2020	20-Nov-2020	£ 50,868.00	£ 50,868.00		
•	Der Ori	D 0000007821	Outstanding	5M	5M Quality Rail Services Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00	£ 55,200.00		
•	CRI ORI	D 0000007820	Outstanding	5M	5M Quality Rail Services Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25	£ 2,620.25		
•	CRI ORI	D 0000007819	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62	£ 3,260.62		
•	DRI ORI	D 0000007818	Outstanding	AUDIO	Audio Supply and Rental Services bu	04-Aug-2020	04-Aug-2020	£ 323.12	£ 323.12		
•	CRI ORI	D 0000007817	Outstanding	NOVES	Noves Consultancy&Design Ltd	01-Sep-2020	01-Sep-2020	£ 117.50	£ 117.50		
•	ORI	D 0000007816	Part invoiced	NOVES	Noves Consultancy&Design Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00	£ 11,750.00		
•	CRI ORI	D 0000007815	Outstanding	CAPLON	Caplon Furniture Supplies	24-Aug-2020	24-Aug-2020	£ 120.00	£ 120.00		
•	CRI ORI	D 0000007814	Outstanding	5M	5M Quality Rail Services Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00	£ 12,925.00		
•	ORI	D 0000007812	Outstanding	T00001	Texauto Ltd	15-Jun-2020	15-Jun-2020	£ 7,050.00	£ 7,050.00		
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tstanding								н	н н н Рас	ge 1 of	2

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:

🞽 🖯 ් ර	↑ ↓ ≠	Purchase Order Authorisi	ation Rejection -	Message (Plain Text)	? 📧	- 🗆	×			
FILE MESSA	AGE										
	Reply	Allocation rever	V	Ark Unread	ał 🗥	Q					
Delete	Reply All	To Manager •	Move 🎽	Categorize *	Translate	Zoom					
	Forward		- 11 ¹¹	Follow Up *	- 6-	-					
Delete	Kespond	Quick Steps 14	Nove	lags is	Editing	Zoom		^			
Wee 11/11/2020 10:55											
Purchase Order Authorisation Rejection											
To .											
Purchase Order Number: 0000007835 has been rejected by JAMES SMITH with the following comments:											
Not required											
See more about						2		^			

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.



👌 Data	flow Clarity [f	Purchase	Orders]													- 0	×
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•		ORD	000007835	Outstanding			5M 5M Quality Rail Service				11-Nov-2020	11-Nov-2020	£ 4,608.00		£ 4,608.00		lters
۰		ORD	000007833	Outstanding	3	Refresh				nts Ltd	03-Nov-2020	03-Nov-2020	£ 333.60		£ 333.60		μ.
•		ORD	0000007832	Outstanding	3	New punch out order				nts Ltd	03-Nov-2020	03-Nov-2020	£ 442.56		£ 442.56		
۰		ORD	0000007831	Outstanding		Quick o	rder			nts Ltd	03-Nov-2020	03-Nov-2020	£ 699.59		£ 699.59		
•		ORD	0000007830	Part Delivere	d, 👞	Copy or	der				29-Sep-2020	29-Sep-2020	£ 64.29		£ 26.15		
۰		ORD	0000007826	Part Delivere	d,		4			Ltd	01-Oct-2020	01-Oct-2020	£ 518.40		£ 109.00		
•		ORD	0000007825	Outstanding		Add Urd	Jer Oslas			s Ltd	12-Nov-2020	12-Nov-2020	£ 240.00		£ 240.00		
•	<u></u>	ORD	0000007823	Outstanding	Ű	Remove Order			s Ltd	09-Oct-2020	09-Oct-2020	£ 1,200.00		£ 1,200.00			
•	<u> 1</u>	ORD	0000007822	Outstanding	\sim				s	14-Sep-2020	20-Nov-2020	£ 50,868.00		£ 50,868.00			
•	<u> 1</u>	ORD	0000007821	Outstanding						s Ltd	14-Sep-2020	14-Nov-2020	£ 55,200.00		£ 55,200.00		
•		ORD	0000007820	Outstanding	4	View Or	View Order View scanned documents Attach scanned document Preview order 0000007835 Download order 000007835 for final print Email order 000007835 to supplier			s Ltd	08-Jun-2020	08-Jun-2020	£ 2,620.25		£ 2,620.25		
•		ORD	000007819	Outstanding	<u> </u>	View sc				al Services bu	04-Aug-2020	04-Aug-2020	£ 3,260.62		£ 3,260.62		
•	<u> </u>	ORD	0000007818	Outstanding	2	Attach s				al Services bu	04-Aug-2020	04-Aug-2020	£ 323.12		£ 323.12		
•		ORD	0000007817	Outstanding	4	Preview				sign Ltd	01-Sep-2020	01-Sep-2020	£ 117.50		£ 117.50		
•		ORD	000007816	Part invoiced	入	Downlo				t sign Ltd	01-Jun-2020	01-Jun-2020	£ 94,000.00		£ 11,750.00		
•	<u></u>	ORD	000007815	Outstanding		Email o				es	24-Aug-2020	24-Aug-2020	£ 120.00		£ 120.00		
•		ORD	0000007814	Outstanding	3	Print/Er	nail curren	: range		s Ltd	07-Sep-2020	07-Sep-2020	£ 12,925.00		£ 12,925.00		
•		000	0000007812	Outstanding	- 100	Deliver	000000783	5			15-Jun-2020	15-Jun-2020	£ 7,050.00		£ 7,050.00		
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