

# Supervisor Functionality

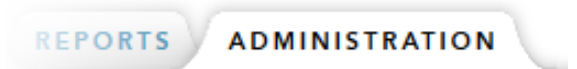
Audit firms can appoint one or more Supervisors to oversee usage of Confirmation.com.

By default, confirmation request fees are settled when they are sent to the bank by the auditor using a debit or credit card. High volume users have the option to move to centralized billing, linking all purchases by one or more offices to a single credit card.

Where Office Billing is enabled, we recommend setting up one or more **'Supervisors'** to oversee office activity. Supervisors have access to additional functionality:

## The 'Administration' Tab

Supervisors gain access to the 'Administration' tab, providing audit firms with the ability to oversee their office activity and manage users and clients.



## Office Billing Reports

The 'Office Activity' Report can be accessed from the 'Reports' section on the 'Administration' tab. It provides details of all confirmations processed between two dates by auditors belonging to the office(s) that the Supervisor oversees.

These reports can be used for client billing reconciliation purposes. Staff submitting confirmations can be encouraged to include an 'Engagement Number' (i.e. client charge code) to facilitate the reconciliation process.

Select Report: 
 Country: 
 Office: 
 From Date: 
 To Date:

[view](#) [export](#)

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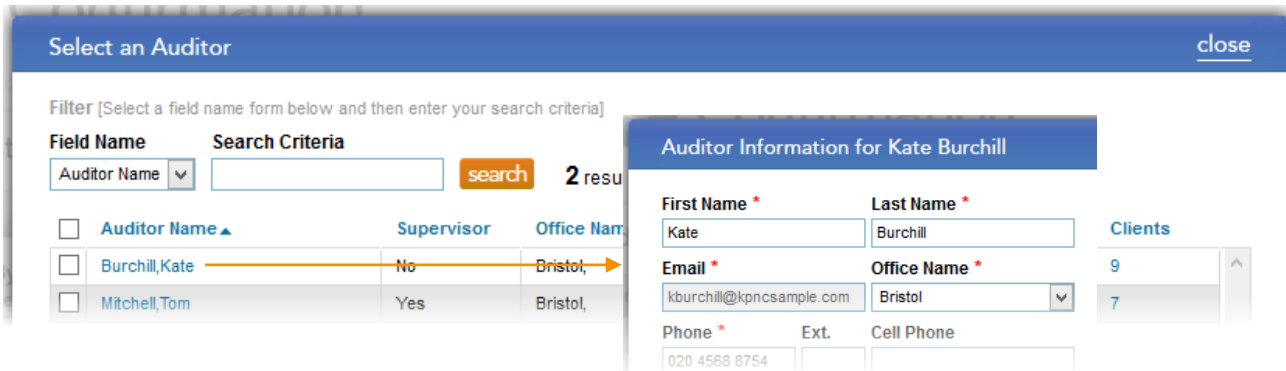
Country	Office Name	Invoice Month	Date	Request Date	Accountant Name	Accountant Email	Client Name	Engagement Number	PR#	Responder
United Kingdom	Bristol	February	03/02/2015 09:42	31/12/2014	Kate Burchill	kburchill@kpncsample.com	Gordon Electricals Ltd		M2111178	The Royal Bank
United Kingdom	Bristol	February	10/02/2015 12:31	31/12/2014	Kate Burchill	kburchill@kpncsample.com	International Airlines Plc		V212G327	The Royal Bank
United Kingdom	Bristol	February	10/02/2015 12:31	31/12/2014	Kate Burchill	kburchill@kpncsample.com	International Airlines Plc		V212G327	The Royal Bank
United Kingdom	Bristol	February	10/02/2015 12:34	31/03/2015	Kate Burchill	kburchill@kpncsample.com	Interweb Technologies		L2127X85	Citibank - Accounts Domiciled in Europe
United Kingdom	Bristol	February	10/02/2015 12:34	31/03/2015	Kate Burchill	kburchill@kpncsample.com	Interweb Technologies		L2127X85	The Royal Bank
United Kingdom	Bristol	February	10/02/2015	31/01/2015	Kate Burchill	kburchill@kpncsample.com	Armstrong	WBS33384939	R2121174	The Royal Bank

# Supervisor Functionality

## User Management

Use the 'Edit Auditor' button from the 'Action Links' section on the 'Administration' tab to view and edit users.

You can view their client lists, and also deactivate users that have left your firm.



**Select an Auditor** close

Filter [Select a field name form below and then enter your search criteria]

Field Name    Search Criteria

Auditor Name        search    2 results

<input type="checkbox"/>	Auditor Name ▲	Supervisor	Office Name
<input type="checkbox"/>	Burchill, Kate	No	Bristol, →
<input type="checkbox"/>	Mitchell, Tom	Yes	Bristol,

**Auditor Information for Kate Burchill** close

First Name \*    Last Name \*    Clients

Kate    Burchill    9

Email \*    Office Name \*    7

kburchill@kpncsample.com    Bristol

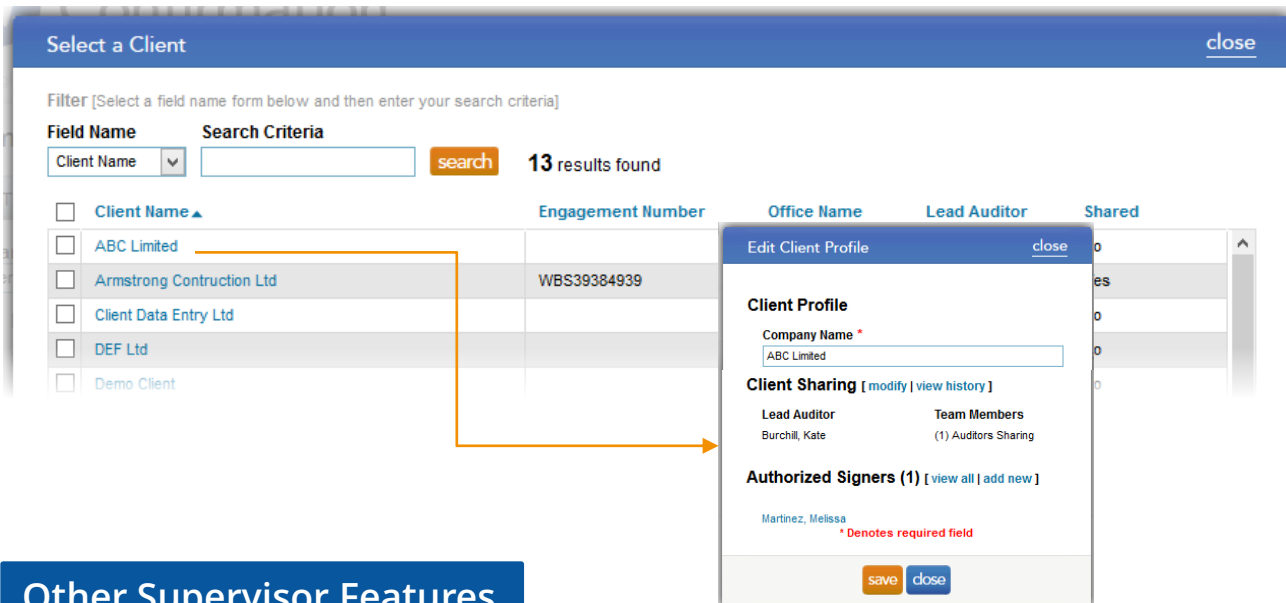
Phone \*    Ext.    Cell Phone

020 4568 8754

## Client Management

Use the 'Manage Clients' button from the 'Action Links' section on the 'Administration' tab to view and edit clients.

You can edit the client name, manage auditor access and edit authorized signers.



**Select a Client** close

Filter [Select a field name form below and then enter your search criteria]

Field Name    Search Criteria

Client Name        search    13 results found

<input type="checkbox"/>	Client Name ▲	Engagement Number	Office Name	Lead Auditor	Shared
<input type="checkbox"/>	ABC Limited				
<input type="checkbox"/>	Armstrong Construction Ltd	WBS39384939			
<input type="checkbox"/>	Client Data Entry Ltd				
<input type="checkbox"/>	DEF Ltd				
<input type="checkbox"/>	Demo Client				

**Edit Client Profile** close

**Client Profile**

Company Name \*    ABC Limited

**Client Sharing** [ modify | view history ]

Lead Auditor    Team Members

Burchill, Kate    (1) Auditors Sharing

**Authorized Signers (1)** [ view all | add new ]

Martinez, Melissa

\* Denotes required field

save    close

## Other Supervisor Features

View Unassigned Clients – Allocate clients with no active Users to other Users.

Manage Offices – Edit office details such as address and contact details.

Extra Reporting – Confirmation statuses, Response times, Auditor contacts, Client details, Denial and Bank query reports.