Auditor User Guide

Supervisor Functionality

Audit firms can appoint one or more Supervisors to oversee usage of the Confirmation platform. Where Office Billing is enabled, we recommend setting up one or more Supervisors to oversee the centralized billing activity. Supervisors also have access to additional functionality.

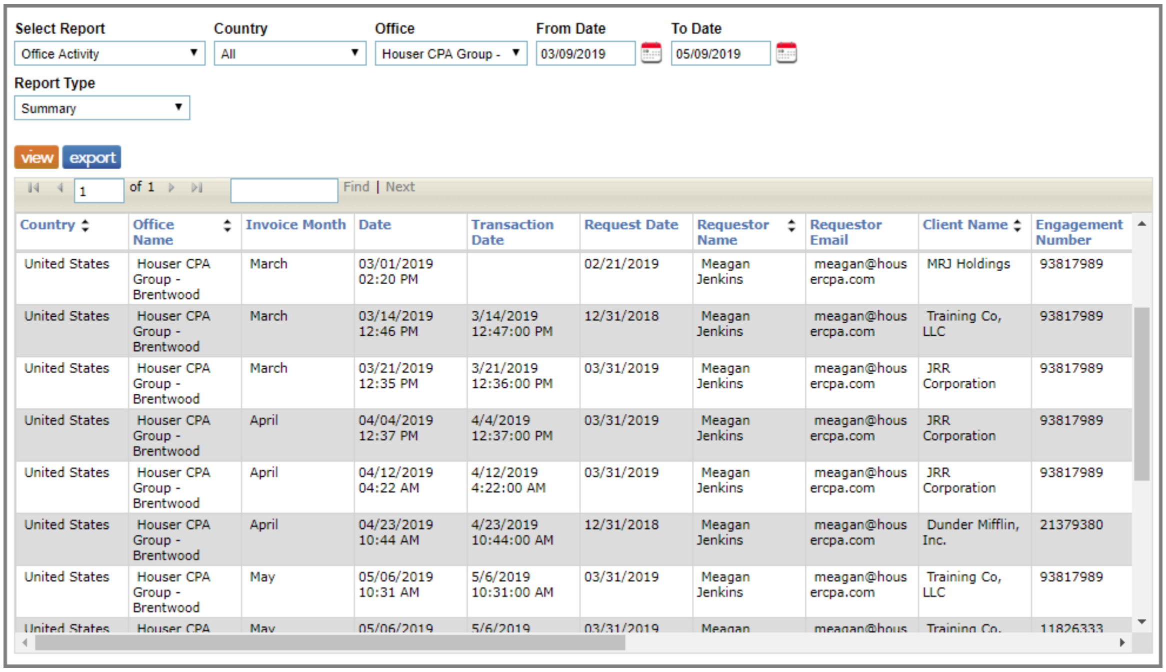
Administration Tab

Supervisors gain access to the **Administration** tab which provides audit firms the ability to oversee their office activity and manage users and clients.

Office Billing Reports

The **Office Activity Report** is accessed from the **Reports** section of the **Administration** tab. It provides details for all confirmations processed for a selected time frame by auditors in 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.

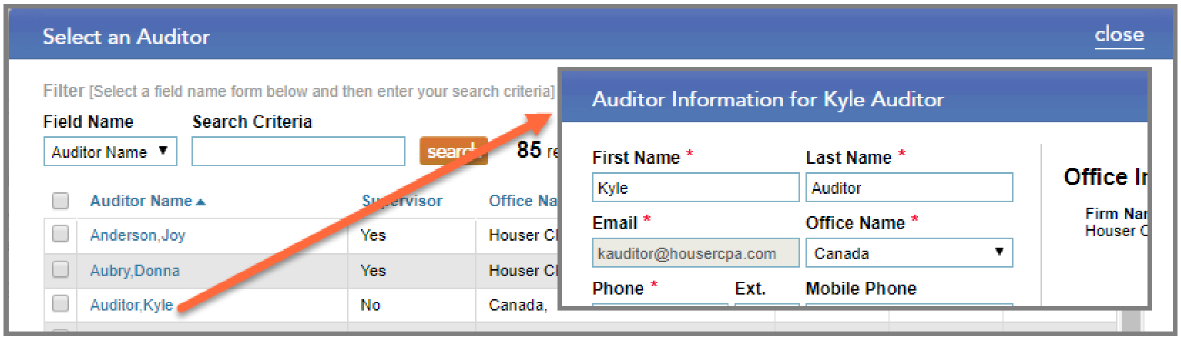

Select Report: Office Activity
Country: All
Office: Houser CPA Group -
From Date: 03/09/2019
To Date: 05/09/2019
Report Type: Summary
view export
1 of 1 Find | Next

Country	Office Name	Invoice Month	Date	Transaction Date	Request Date	Requestor Name	Requestor Email	Client Name	Engagement Number
United States	Houser CPA Group - Brentwood	March	03/01/2019 02:20 PM		02/21/2019	Meagan Jenkins	meagan@houserc pa.com	MRJ Holdings	93817989
United States	Houser CPA Group - Brentwood	March	03/14/2019 12:46 PM	3/14/2019 12:47:00 PM	12/31/2018	Meagan Jenkins	meagan@houserc pa.com	Training Co, LLC	93817989
United States	Houser CPA Group - Brentwood	March	03/21/2019 12:35 PM	3/21/2019 12:36:00 PM	03/31/2019	Meagan Jenkins	meagan@houserc pa.com	JRR Corporation	93817989
United States	Houser CPA Group - Brentwood	April	04/04/2019 12:37 PM	4/4/2019 12:37:00 PM	03/31/2019	Meagan Jenkins	meagan@houserc pa.com	JRR Corporation	93817989
United States	Houser CPA Group - Brentwood	April	04/12/2019 04:22 AM	4/12/2019 4:22:00 AM	03/31/2019	Meagan Jenkins	meagan@houserc pa.com	JRR Corporation	93817989
United States	Houser CPA Group - Brentwood	April	04/23/2019 10:44 AM	4/23/2019 10:44:00 AM	12/31/2018	Meagan Jenkins	meagan@houserc pa.com	Dunder Mifflin, Inc.	21379380
United States	Houser CPA Group - Brentwood	May	05/06/2019 10:31 AM	5/6/2019 10:31:00 AM	03/31/2019	Meagan Jenkins	meagan@houserc pa.com	Training Co, LLC	93817989
United States	Houser CPA	May	05/06/2019	5/6/2019	03/31/2019	Meagan	meagan@hous	Training Co.	11826333

User Management

Click the **Edit Auditor** link from the **Action Links** section of the **Administration** tab to view and edit users.

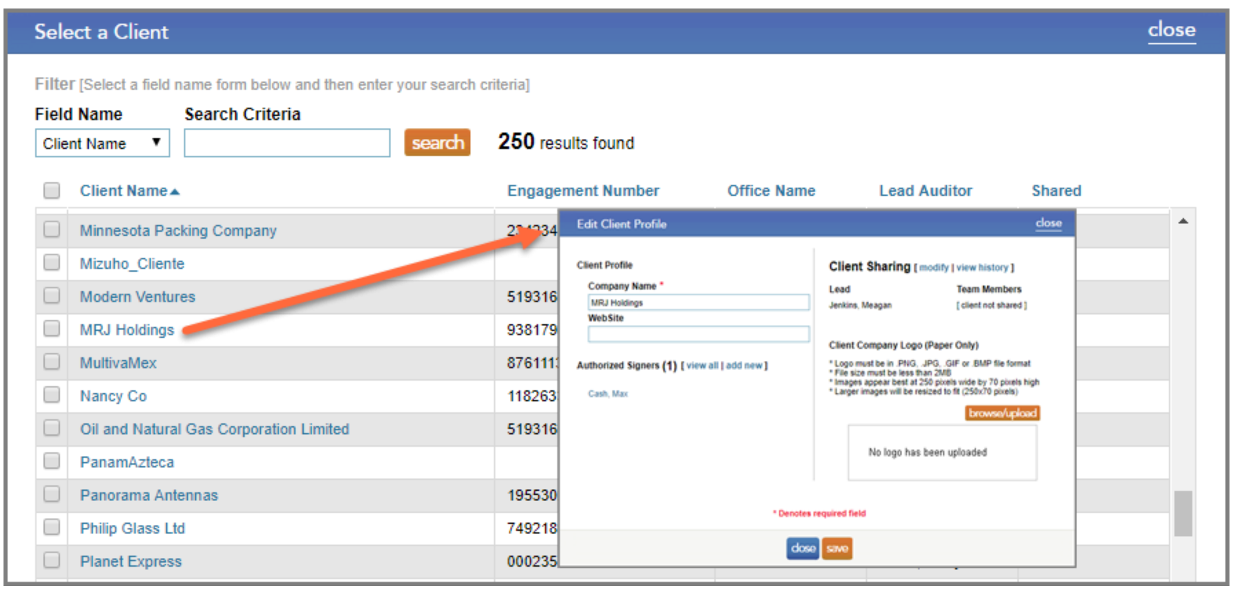
You can view their client lists and also deactivate users that have left the firm.



Client Management

Click the **Manage Clients** link from the **Action Links** section of the **Administration** tab to view and edit clients.

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



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 information

Additional Reporting - Confirmation statuses, response times, auditor contacts, client details, denial and bank query reports

Need help? Contact our customer support team:

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- +1 (866) 325-7201