



Auditor Workflow - Admin

First, create a login for an auditor under the 'users' tab and make sure the status is 'active'

### New User

Role

Auditor

Terminal

Employee no.

Status

Active

First name

Last name

This field is required.

This field is required.

Email

theauditor@yourcompany.com

We recommend using a generic email @yourcompany.com, that way any auditor may use the login in the future

\*take note of this login info to provide it to an auditor

Under the Driver Tab, select the 10% or search and select specific drivers the auditor is looking for  
 -Select Actions, and 'mark drivers for audit'  
 You will see the system generate those profiles and populate them on the admin dashboard.

Add new ▾ Filter ▾ Actions ▾ 7 record(s) selected ⓘ

		First name	Last name	DL #
<input checked="" type="checkbox"/>		Buck	Johnson	T7878:
<input checked="" type="checkbox"/>		Alex	Smith	
<input checked="" type="checkbox"/>		Karl	Oberg	
<input checked="" type="checkbox"/>		Geotab	Two	
<input checked="" type="checkbox"/>		test	geotab driver	
<input checked="" type="checkbox"/>		Driver	Testing	
<input checked="" type="checkbox"/>		Ronald	Reyes	
<input type="checkbox"/>		George	Stone	
<input type="checkbox"/>		Tom	Jones	
<input type="checkbox"/>		Brett	Perez	

Add new ▾ Filter ▾ Actions ▾ 7 record(s) selected ⓘ

- Select all on this page
- Unselect all on this page
- Select all (Up to 500)
- Select a custom task
- Mark driver(s) for audit**
- Export Clearinghouse (.xlsx)

		First name	
<input checked="" type="checkbox"/>		Buck	
<input checked="" type="checkbox"/>		Alex	
<input checked="" type="checkbox"/>		Karl	
<input checked="" type="checkbox"/>		Geotab	
<input checked="" type="checkbox"/>		test	geotab driver
<input checked="" type="checkbox"/>		Driver	Testing
<input checked="" type="checkbox"/>		Ronald	Reyes
<input type="checkbox"/>		George	Stone

Drivers successfully marked audited. ✕

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		First name	Last name
<input checked="" type="checkbox"/>		Geotab	Two
<input checked="" type="checkbox"/>		test	geotab driver
<input checked="" type="checkbox"/>		Driver	Testing
<input checked="" type="checkbox"/>		Ronald	Reyes
<input type="checkbox"/>		George	Stone

Welcome back, Demo Auditor.

	First name	Last name	DL #	City
	Buck	Johnson	T7878788	auburn
	Alex	Smith	F2222222	Anytown
	Karl	Oberg	N9653621	AnyTown
	Geotab	Two	L8989219	fremont
	test	geotab driver	T0808799	Auburn
	Driver	Testing	H0009292	Auburn
	Ronald	Reyes	H0603195	test

When an auditor logs in, the only thing they can see is the driver profiles that you have marked for audit. They have no access to your company profile or other drivers' information.

### Information

First name	Buck
Last name	Johnson
Address	8989 tin roof road
City	auburn
State	CA
Zip	999000

SSN	xxx-xx-1456
DL State	CA
Drivers licenses no	T7878788
DL Exp.	2026-04-23
Medical card exp.	2022-09-09
TSA hazmat exp.	2023-01-20

### Table of contents

Information

Attachments

✓ Audit complete

Once in a driver profile, the auditor will see all basic info, and DOT attachments. When complete the driver is removed from the auditor dashboard, and they can no longer review that information.

Welcome back, **Demo Auditor**.

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There are no users marked for audit.

What the auditor will see when audits have been complete

