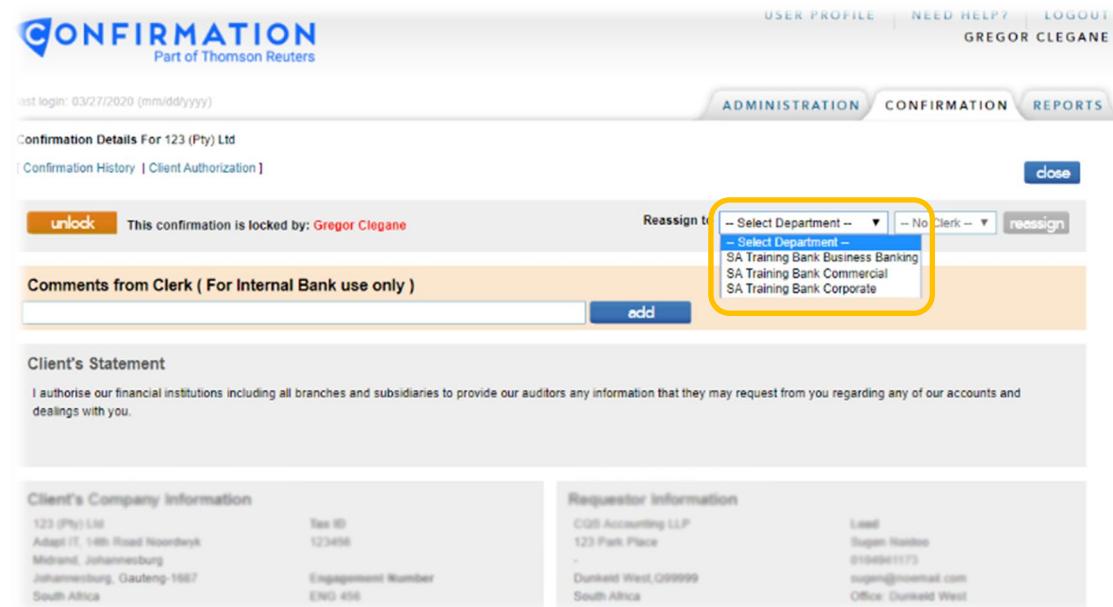


E. Assigning/Reassigning a Confirmation

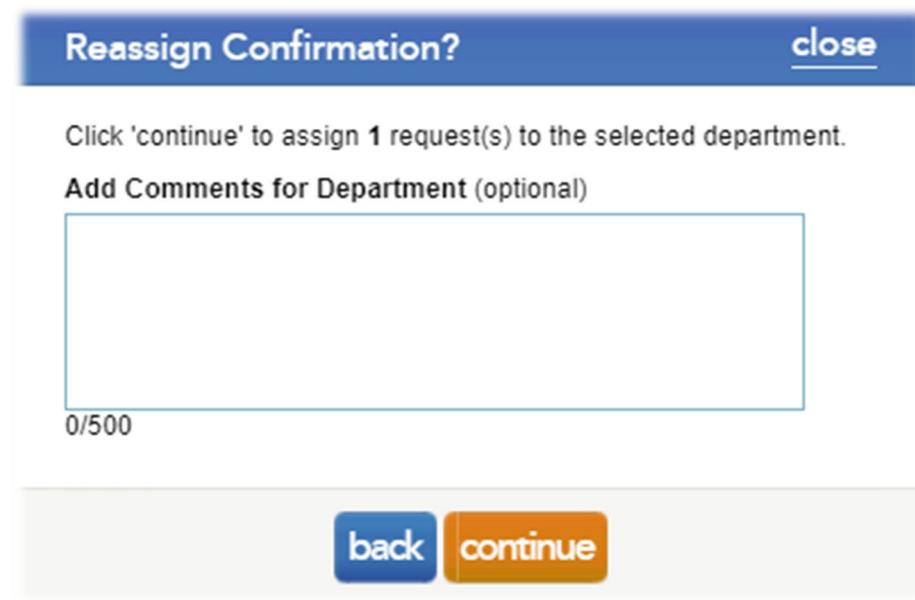
1. How to Reassign a Confirmation Request to another Department

1. In an opened confirmation request, select from the dropdown list, located on the top right of the screen, the department name for the confirmation request to be reassigned too and select the *reassign* button.



The screenshot shows the Confirmation software interface. At the top, there are navigation links: USER PROFILE, NEED HELP?, and LOGOUT, with the user name GREGOR CLEGANE. Below this is a menu bar with ADMINISTRATION, CONFIRMATION (which is selected and highlighted in blue), and REPORTS. The main content area shows a confirmation request for '123 (Pty) Ltd'. A message at the top says 'This confirmation is locked by: Gregor Clegane'. Below this is a section for 'Comments from Clerk (For Internal Bank use only)' with an 'add' button. To the right, there is a 'Reassign to' section with a dropdown menu titled 'Select Department' containing options like 'SA Training Bank Business Banking', 'SA Training Bank Commercial', and 'SA Training Bank Corporate'. A yellow box highlights this dropdown menu. At the bottom of the page, there are sections for 'Client's Company Information' and 'Requestor Information', each with several fields. The 'Requestor Information' section includes a 'Last' field with 'Sugan Naidoo', a 'Phone' field with '0104961173', an 'Email' field with 'sugan@ossemail.com', and an 'Office' field with 'Dunkeld West'.

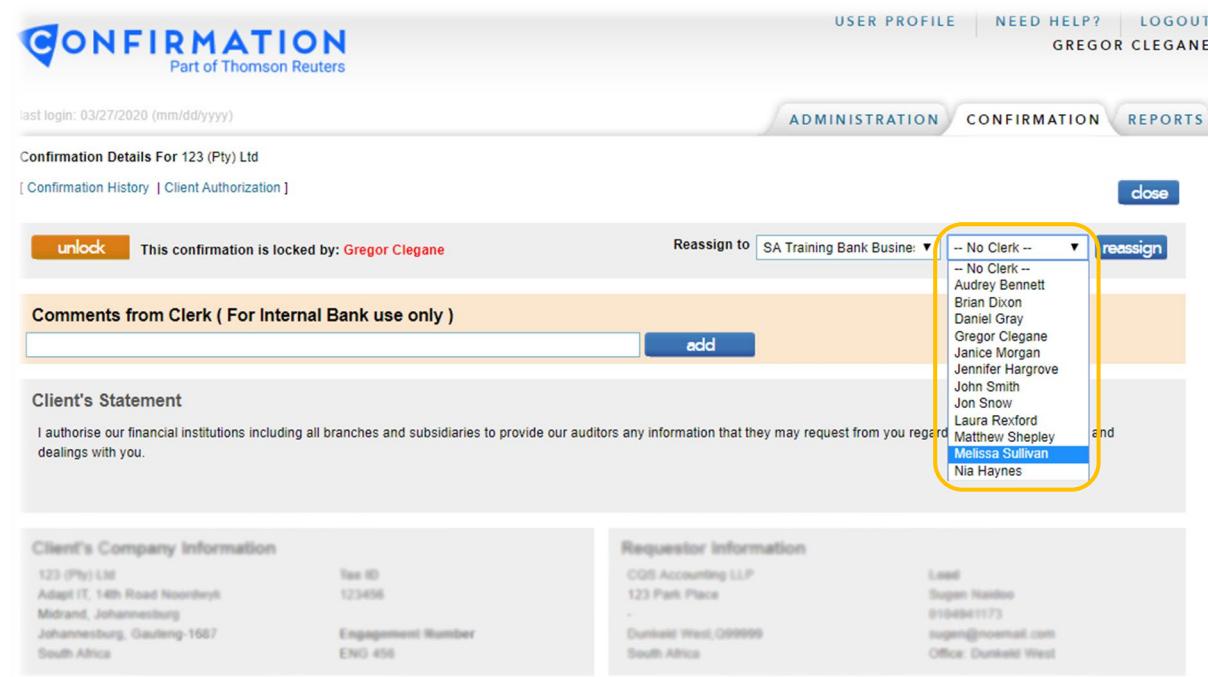
2. It is optional to add a comment and select on the *continue* button.



The screenshot shows a modal dialog box titled 'Reassign Confirmation?'. It contains the text 'Click 'continue' to assign 1 request(s) to the selected department.' Below this is a text input field for 'Add Comments for Department (optional)' with a character limit of 500. At the bottom of the dialog are two buttons: 'back' (blue) and 'continue' (orange).

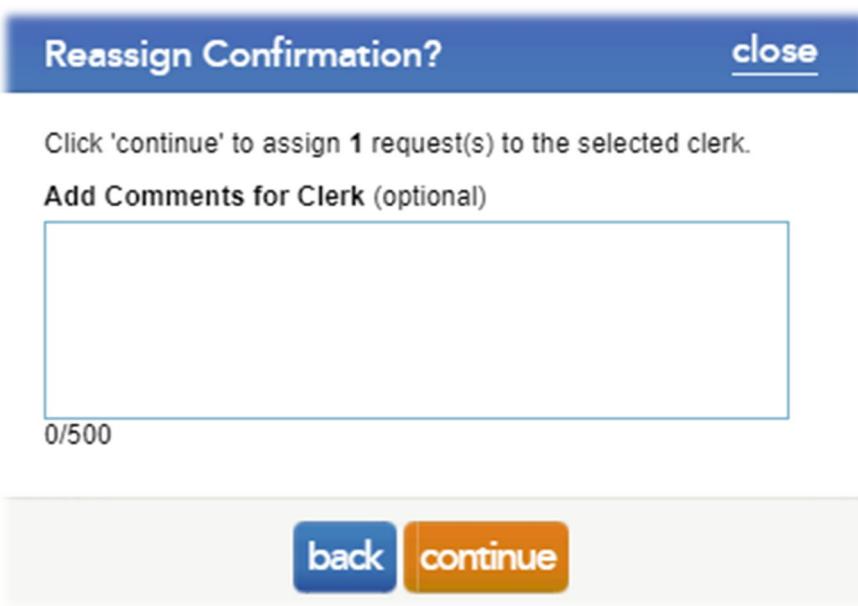
2. How to Reassign a Confirmation Request to another User

1. In an opened confirmation request, select from the dropdown list, located on the top right of the screen, the department name from which the user is from. After the department is selected, the dropdown list of users' names will become available for selection. Select the desired username and click the *reassign* button.



The screenshot shows the Confirmation software interface. At the top, there is a navigation bar with links for 'USER PROFILE', 'NEED HELP?', 'LOGOUT', and the user 'GREGOR CLEGANE'. Below the navigation bar, there are tabs for 'ADMINISTRATION', 'CONFIRMATION' (which is selected), and 'REPORTS'. The main content area shows 'Confirmation Details For 123 (Pty) Ltd' and links for 'Confirmation History' and 'Client Authorization'. A message indicates the confirmation is locked by 'Gregor Clegane'. A 'Comments from Clerk (For Internal Bank use only)' input field and an 'add' button are present. Below this, a 'Client's Statement' section contains a text box for authorizing financial institutions. On the right, there is a 'Reassign to' dropdown menu with a list of users, one of which, 'Melissa Sullivan', is highlighted with a yellow box. At the bottom, there are sections for 'Client's Company Information' and 'Requestor Information', each with specific details. A 'close' button is located in the top right corner of the main content area.

2. It is optional to add a comment and select the *continue* button.



Reassign Confirmation? [close](#)

Click 'continue' to assign 1 request(s) to the selected clerk.

Add Comments for Clerk (optional)

0/500

[back](#) [continue](#)

3. How to Bulk Reassign / Unlock Confirmation Requests from the Pending Inbox

A user can reassign or unlock more than one confirmation request from the pending inbox. Check the tick boxes of the desired confirmation requests, and select from the Action List *Reassign* or *Unlock*. Click on the *submit* button and follow the same steps above.

CONFIRMATION
Part of Thomson Reuters

USER PROFILE | NEED HELP? | LOGOUT
GREGOR CLEGANE

last login: 03/27/2020 (mm/dd/yyyy)

ADMINISTRATION | CONFIRMATION | REPORTS

Pending (14) | In Progress (3) | Review (6) | Pre-Processed (0) | Follow Up

Department	Clerk	Display	Client Name	As of Date	<input checked="" type="checkbox"/> All	Form
SA Training Bank Cr	All	Current		All	<input type="button" value="Calendar"/>	All

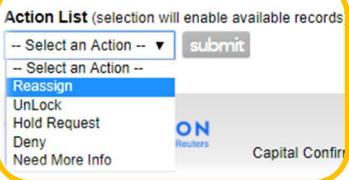
search 2 results found

<input type="checkbox"/> Account ID	Client Name	Aging	As of Date	Form	Received	Clerk
<input type="checkbox"/> 5101520	123 (Pty) Ltd	13 days	01/31/2020	EMEA - Consolidated	03/09/2020	Gregor Clegane 
<input type="checkbox"/> 3691215	123 (Pty) Ltd	13 days	01/31/2020	EMEA - Consolidated	03/09/2020	-

Action List (selection will enable available records)

-- Select an Action --

-- Select an Action --

Reassign 

UnLock
Hold Request
Deny
Need More Info

ON
Reuters

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Capital Confirmation's business processes are covered by US Patent Nos. 7383232, 7831488, 8442880, 8484105, 8510185, 8543475. Other patents are pending.

<< | < | PAGE OF 1 | > | >> | 25 per page |

 Assigned  Locked

Note: A Supervisor user can reassign or unlock more than one confirmation request from the pending inbox. A Clerk user can only reassign or unlock more than one request that is not already locked or assigned to another user.