Client Authorisation

Client authorisation must be obtained online in order to initiate requests.

On Confirmation.com, client authorisation is requested for each Client Profile (legal entity), with authorisation valid for 180 days once received. Your client is **not** required to register or log in to Confirmation.com to provide their authority.

1 Add New Client

To get started select 'Add New Client' from the Quick Links section and complete the required information fields.

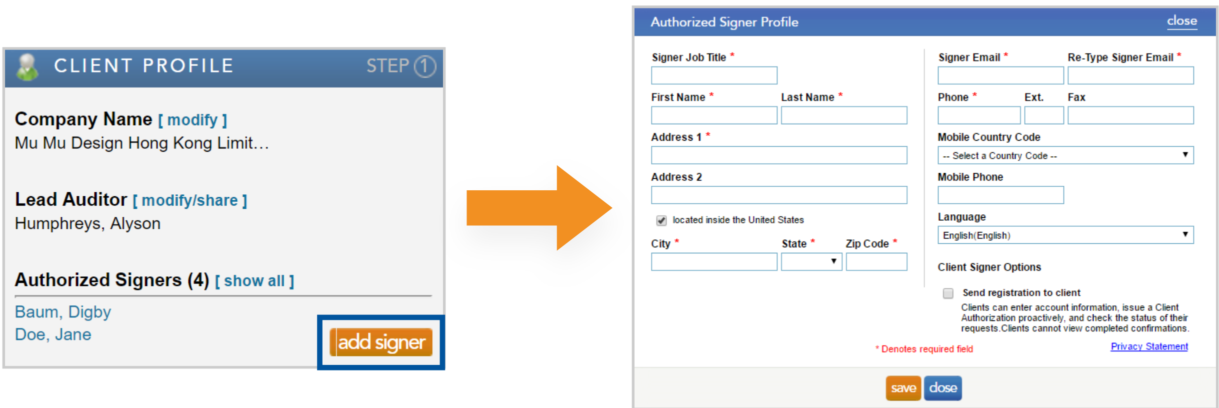
In Company Name, enter the specific entity name as per the bank records. If the entity is part of a group, input the specific legal entity/subsidiary name in this field. In the Authorised Signer Information field, enter the authorised signer details and click "save".

If a signers authority is required across multiple Client Profiles, see Hints & Tips - Client Authorisation for Groups.

Language options: When entering signer details, you can select the language your signer receives correspondence from Confirmation.com by simply using the language drop down.

2 Add Additional Signer(s)

Once the Client Profile has been created, if required, you are able to add additional signer(s) by selecting "Add Signer" from Step 1: Client Profile. Enter required fields and click "save".



3 Select Signer(s)

To add an Authorised Signer to a specific request, in Step 2: Add Accounts, simply tick the boxes next to each of the applicable Authorised Signer(s). You are able to nominate up to four Authorised Signers per request.

Forgot a Signer? If an Authorised Signer has not yet been added, you are able to add the Signer in Step 2: Adding Accounts. Select "Add New" and enter the required details as normal.

Important note: Adding a new Authorised Signer at this step will erase any unsaved account details (e.g. an account number entered).

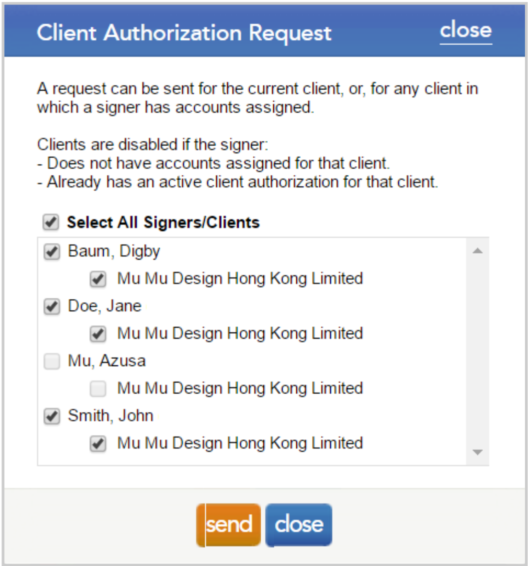
4 Request Client Authorisation

To request authorisation from your nominated Authorised Signer(s), from Step 3: Client Authorisation, simply click "request". Select the signers and Client Profiles for which you would like to request authorisation and click "send".

If multiple authorised signers have been added to the profile you are able to request authorisation from all signers at once.

Can't select a signer? Authorised signers must have at least one account assigned in their name before you are able to request their authorisation. If you have added a new authorised signer, to assign an account to their name:

1. From Step 2: Add Accounts select "View All".
2. From the Action List in the lower left, select “Reassign Signers”.
3. Using the checkboxes, select accounts to be reassigned and click “Select Signers”.
4. Select one or more signers and click "submit" to update.



5 Client View

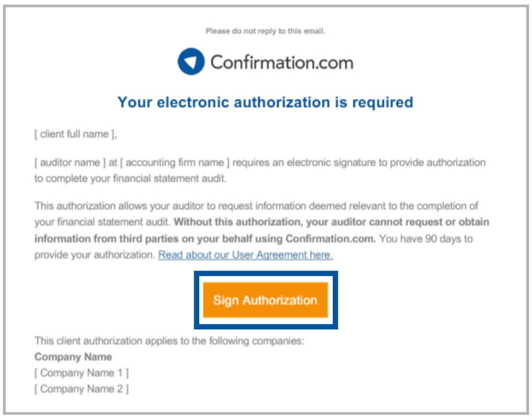
When you request authorisation, your client will receive an email from **systems.administrator@confirmation.com** advising authorisation has been requested by your audit firm.

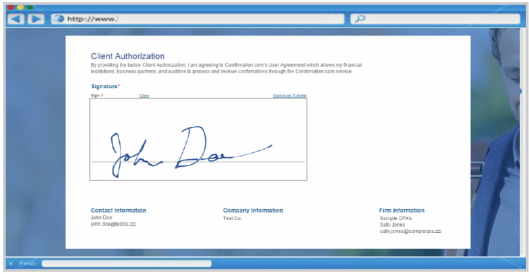
Once opened, your client is not required to register or log in to Confirmation.com to provide their authority. Clients simply need to click "Sign Authorisation" to gain access to to the Client Authorisation area.

Using a smart device or mouse pad your client will provide their signature and click “submit” to authorise your firm to submit audit confirmation requests on their behalf via Confirmation.com.

Client Authorisation will apply to all requests associated with the Client Profile and is valid for 180 days from the date received. This means you are able to add and/or edit requests, without needing to request authorisation on multiple occasions.

If your client does not receive this email, please ask they add **systems.administrator@confirmation.com** to their Safe Senders list and send a new client authorisation request.





6 Initiate Request

Once Client Authorisation is received you will be able to continue to Step 4: Initiate to send your request to the bank.

Client Profiles and associated accounts are saved for future use. If completed correctly and account details do not change, requesting client authorisation will be the only step you will be required to be compete on future audits.

Important note: If an account has multiple Authorised Signers associated with it, the request(s) will only be available to initiate to the bank once authorisation has been received from all nominated client signers.