

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.

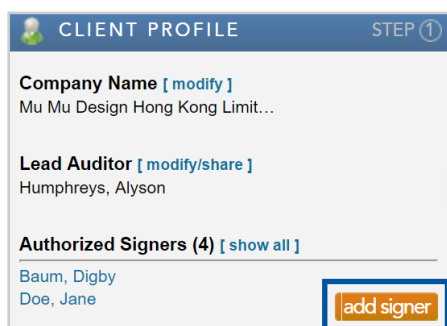
In Company Name, enter the specific entity name as per the bank records. If the entity is part of a group, input the specific legal entity/subsidiary name in this field. In the Authorised Signer Information field, enter the authorised signer details and click "save".

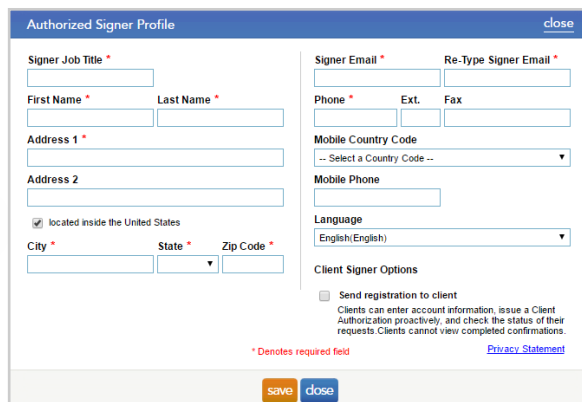
If a signers authority is required across multiple Client Profiles, see Hints & Tips - Client Authorisation for Groups.

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.

Client Authorization Request close

A request can be sent for the current client, or, for any client in which a signer has accounts assigned.

Clients are disabled if the signer:

- Does not have accounts assigned for that client.
- Already has an active client authorization for that client.

☒ **Select All Signers/Clients**

<input checked="" type="checkbox"/> Baum, Digby	<input checked="" type="checkbox"/> Mu Mu Design Hong Kong Limited
<input checked="" type="checkbox"/> Doe, Jane	<input checked="" type="checkbox"/> Mu Mu Design Hong Kong Limited
<input type="checkbox"/> Mu, Azusa	<input type="checkbox"/> Mu Mu Design Hong Kong Limited
<input checked="" type="checkbox"/> Smith, John	<input checked="" type="checkbox"/> Mu Mu Design Hong Kong Limited

send close

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 Authorization" to gain access 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.

Please do not reply to this email.

Confirmation.com

Your electronic authorization is required

[client full name],

[auditor name] at [accounting firm name] requires an electronic signature to provide authorization to complete your financial statement audit.

This authorization allows your auditor to request information deemed relevant to the completion of your financial statement audit. **Without this authorization, your auditor cannot request or obtain information from third parties on your behalf using Confirmation.com.** You have 90 days to provide your authorization. [Read about our User Agreement here.](#)

Sign Authorization

This client authorization applies to the following companies:

Company Name
[Company Name 1]
[Company Name 2]

Client Authorization

By providing the below client authorization, I am agreeing to Confirmation.com's User Agreement which allows my financial institution, business partner, and auditor to request and receive confirmation through the Confirmation.com website.

Signature:

Date: Time: Location:

Contact Information
John Doe
john.doe@company.co

Company Information
Your Co.

Firm Information
Garrett CPA
Sally Jones
sally.jones@confirmation.co

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 complete 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.