



# Step 1: Adding a new client

Once you've logged in, select 'Add New Client' from the Quick Links section.

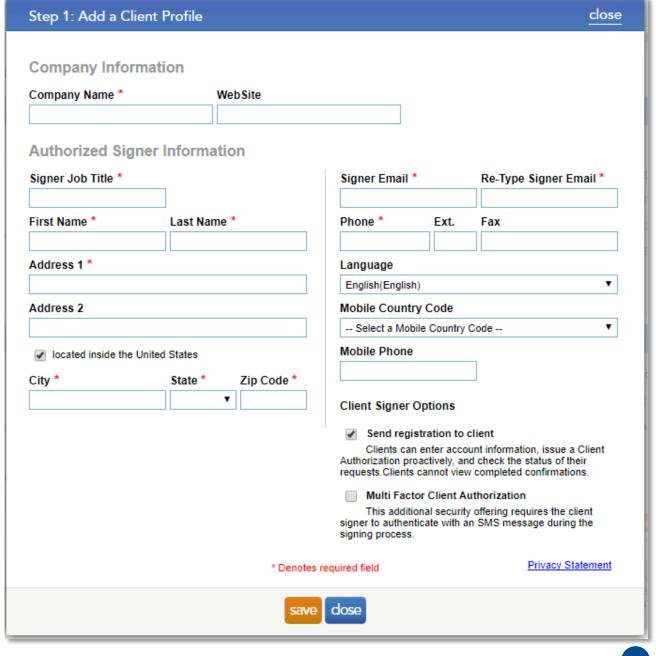


**Company Name** – This is the legal entity / registered company name of your client.

**Signer Information** – This signer information must match the financial institution's information on file of your client.

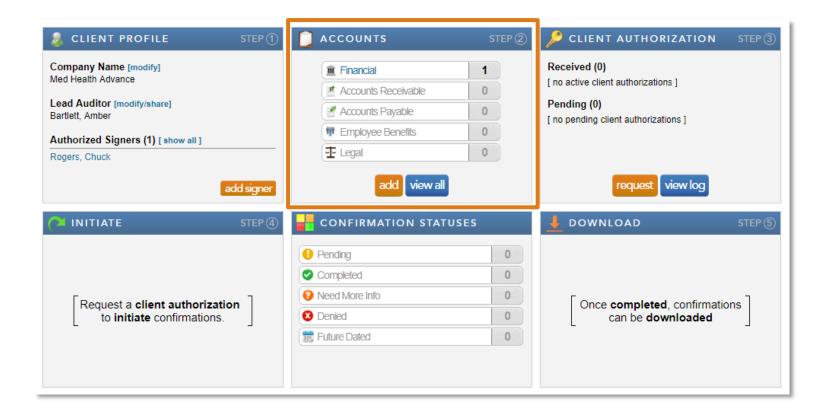
**Signer Email** – This must be the email of the authorized signer. Authorization cannot be delegated to another party.

**Client Registration** – We suggest that you only provide access to the client if it's requested.



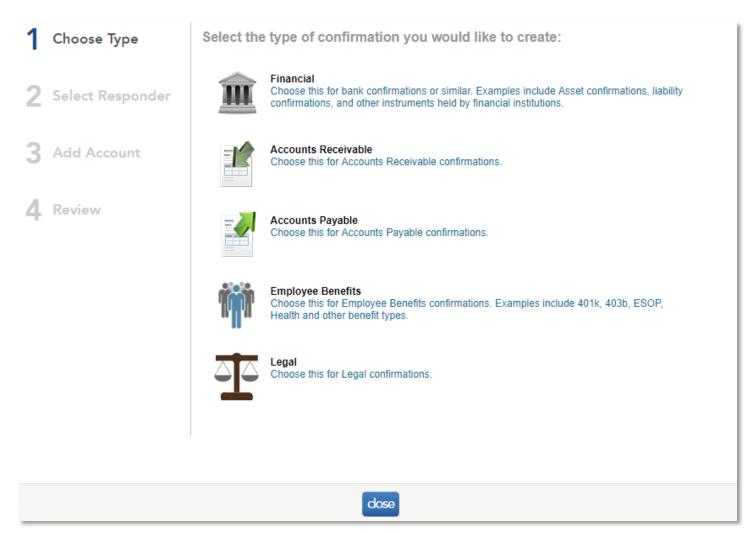
# Step 2: Add accounts – choosing the request type

Once you've created your client's profile, select 'add' from the 'Accounts' section.



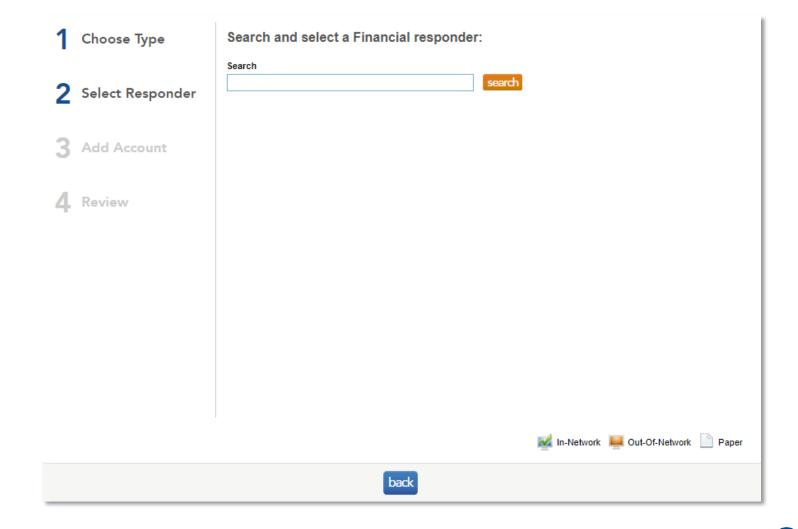
# Step 2: Add accounts – choosing the request type

To send bank confirmations, select the 'Financial' confirmation type.



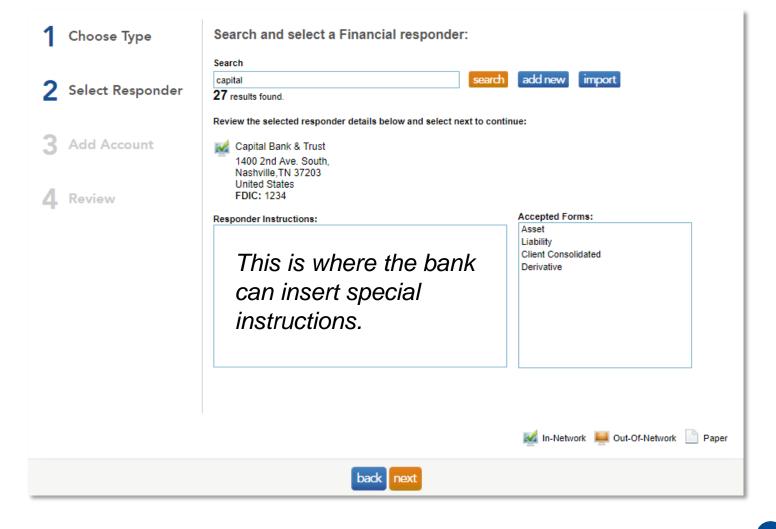
# Step 2: Add accounts – choosing the request type

Then, search for your responding financial institution. Once found, select the name.



# Step 2: Add accounts – choosing the request type

Once you've selected a financial responder, make sure you read the 'Responder Instructions' issued by the financial institution and take note of the 'Accepted Forms.' Responders accept different form types.



# Step 2: Add accounts – choosing the request type

### **Individual forms**

- An individual form confirms the details of a single account.
- Common individual forms include:

Asset

Liability Line of Credit

Bond Issue Money Market Fund

**Escrow Account** 

Contingent Liability HUD Mortgage

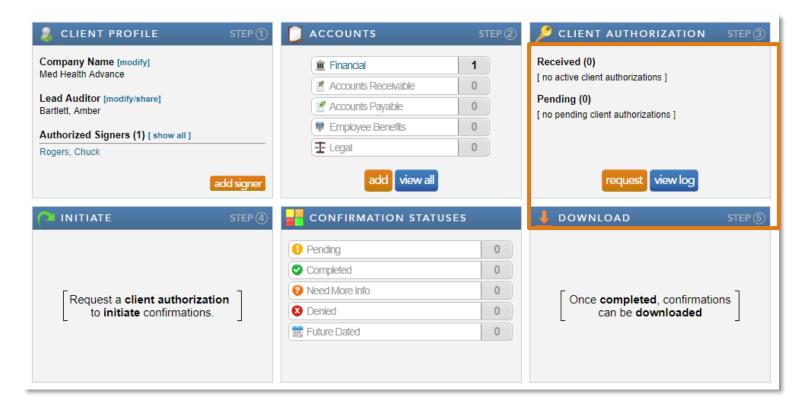
Derivatives Securities

### Example Asset Form



# Step 3: Requesting client authorization

Once you've added all your accounts, you must request client authorization from your client. Do this by clicking the 'request' button.



# Step 3: Requesting client authorization

Your client will receive an email from Confirmation.com requesting their authorization for the financial institution to disclose information through Confirmation.com.

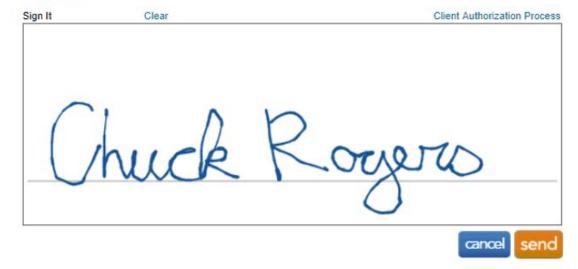
Your client will select the 'sign authorization' button to digitally sign the authorization.

The process takes less than 30 seconds to complete.

### Client Authorization

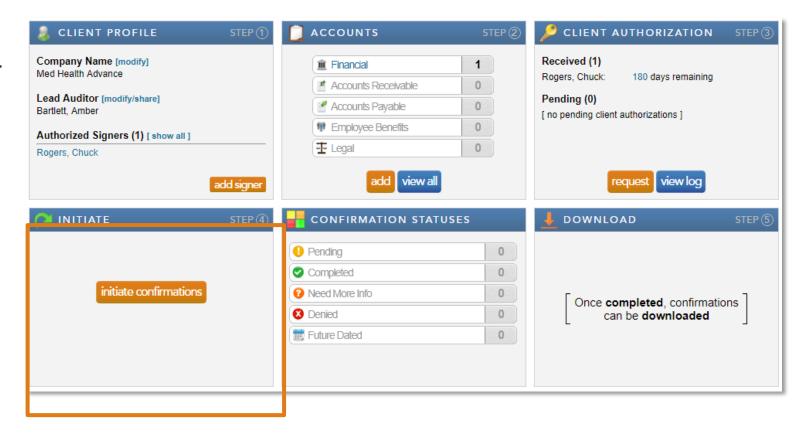
By providing the below Client Authorization, I am agreeing to Confirmation.com's User Agreement which allows my financial institutions, business partners, and auditors to process and receive confirmations through the Confirmation.com service.

### Signature\*



# Step 4: Initiating your confirmations

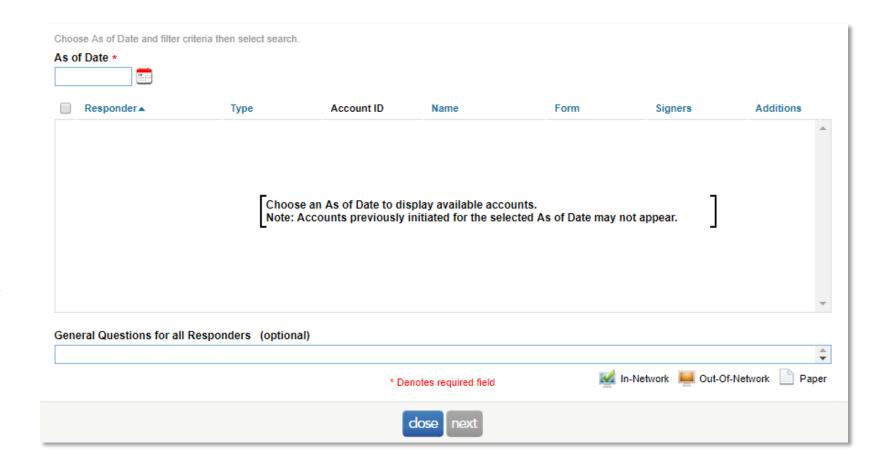
Once you've received your client authorization, you can initiate your confirmations.



# Step 4: Initiating your confirmations

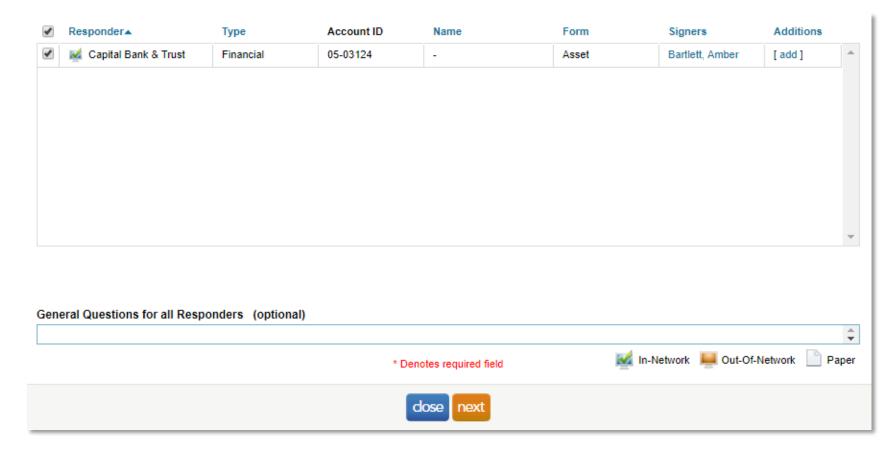
Select your 'As of Date' – this is the balance sheet date of your audit.

You can also future date your confirmations up to 90 days out. Confirmation.com will hold them in a queue until the date indicated.



# Step 4: Initiating your confirmations

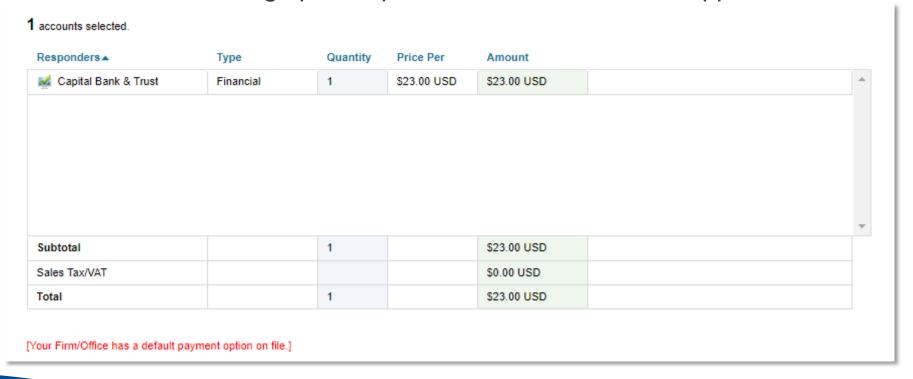
Select which accounts/forms you wish to confirm.



# Step 4: Initiating your confirmations

Once you're ready to send your confirmations, your total fee is calculated. You will be asked to pay at this point via credit card (unless your office has a central credit card on account).

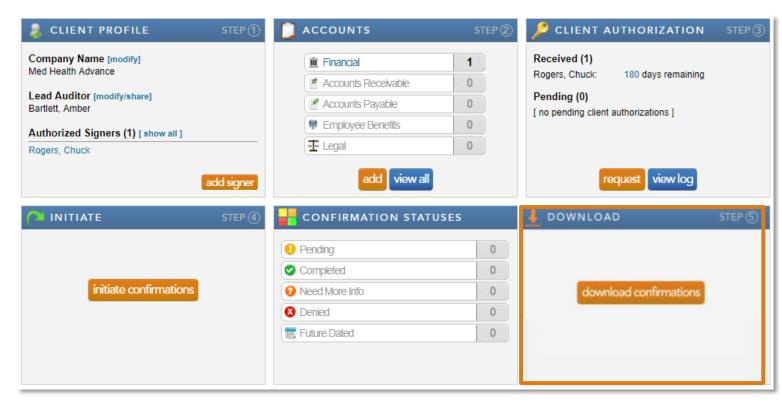
For more information on billing options, please contact Customer Support.



# Step 5: Download your confirmations

When the financial institution completes your confirmations you'll receive a notification via email.

Log in, navigate to your client and click 'download confirmations' to download completed confirmations for your work papers.



### Need more information?

## **Recalling confirmations**

Did you make a mistake? If you sent confirmations to financial institutions with an error, you can 'recall' them provided the financial institutions have not started work on their response.

Watch how to recall a confirmation

### **Re-confirmations**

Was the response not what you were expecting, or missing information? You can send a reconfirmation to the financial institution with a message attached explaining what information is incorrect or missing. The financial institution will prioritize responding to re-confirmations.

Watch how to re-confirm

Need help?

# **Contact Our Customer Support Team**

https://www.contact.confirmation.com/support

+1 866-325-7201 (North America)

+1 615-844-6222 (Global)



# Thank you for using Confirmation.com

