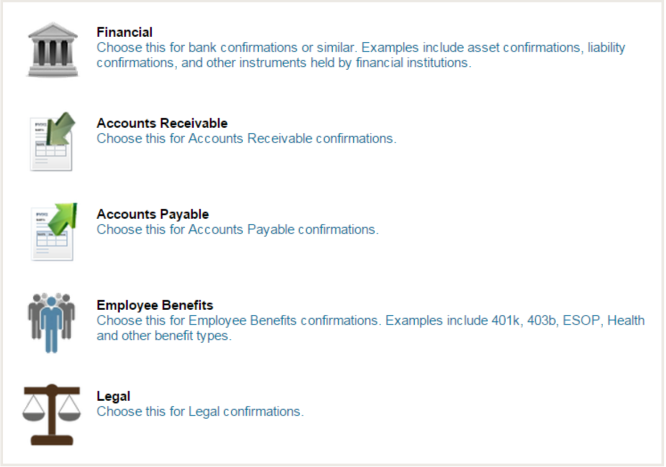
Confirmation.com Quick Reference Guide

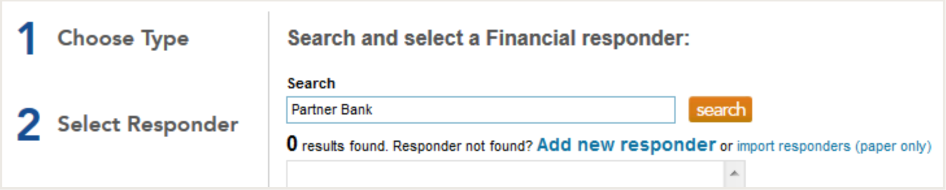
Confirmation.com

Step 1: Add Accounts

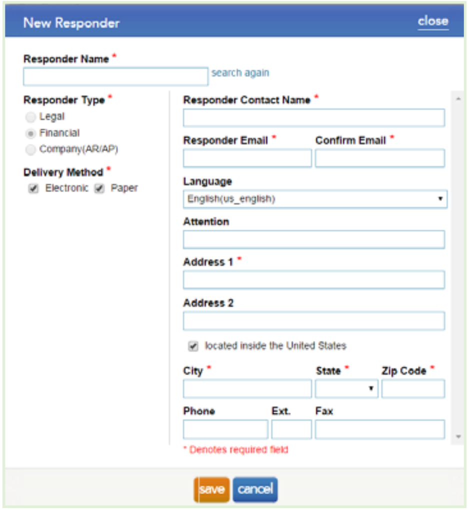
Choose account type: Choose which account type you would like to add to Confirmation.com.



Selecting the responder: Enter the name of the responding entity to which the confirmation is intended.



Enter contact information: For confirmations intended for a recipient that is not yet registered with Confirmation.com, basic contact information such as a physical address and/or email address is required.



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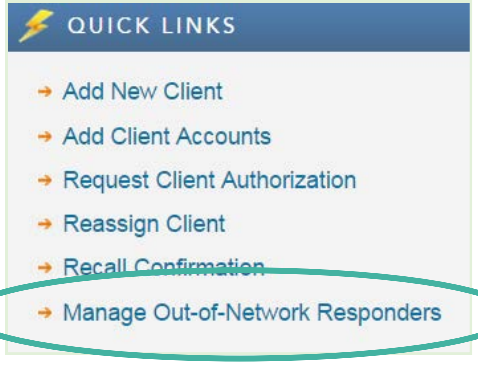
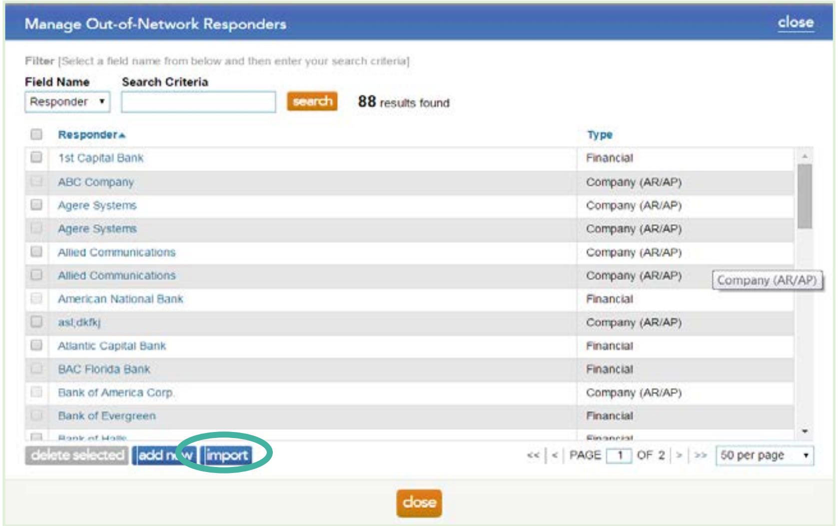
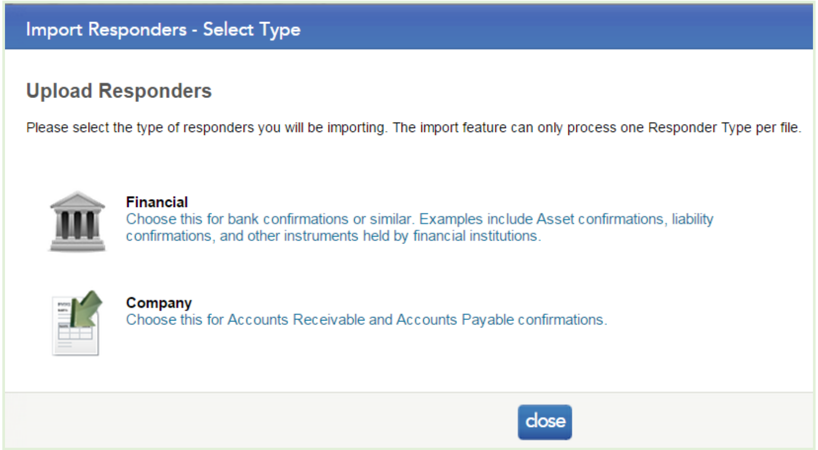
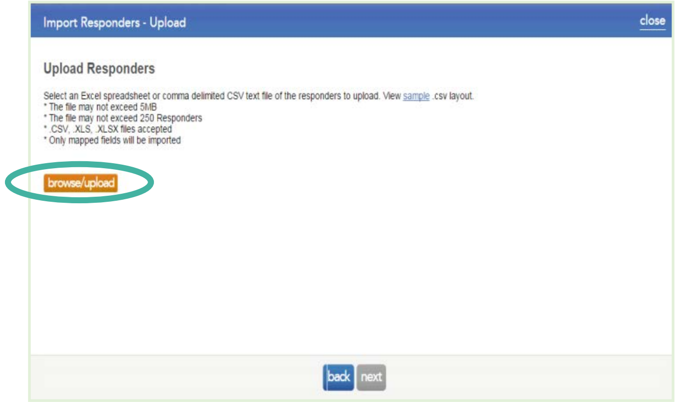
Step 2: Upload

Multiple responders may also be added by selecting “Manage Out-of-Network Responders” in the main dashboard, selecting the “import” button, selecting the type of responders, and uploading the Excel file containing the address information of the responding entities.



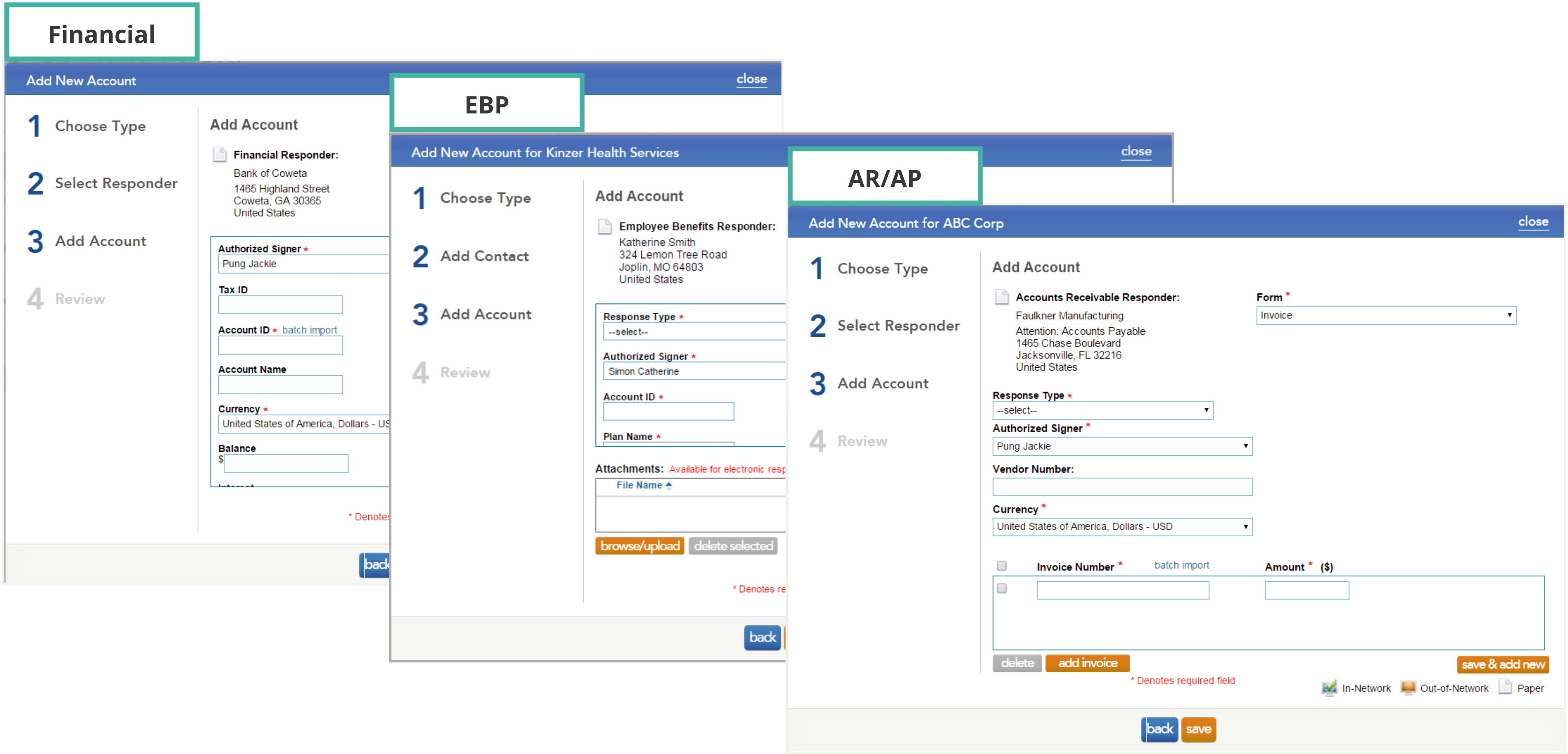






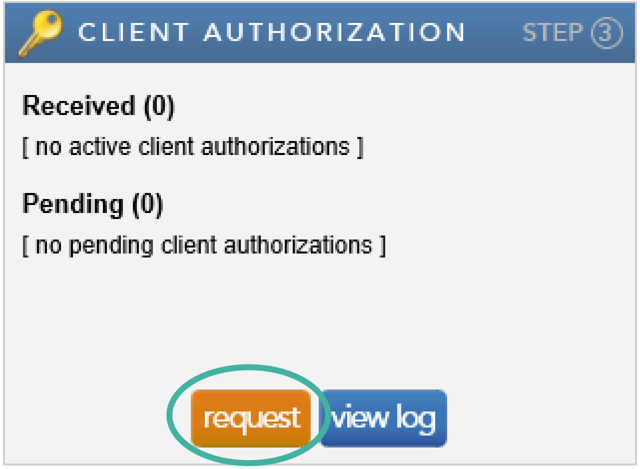
Step 3: Add Account Information

Enter the Account Numbers, Invoice Numbers, or Balance Information to be confirmed.

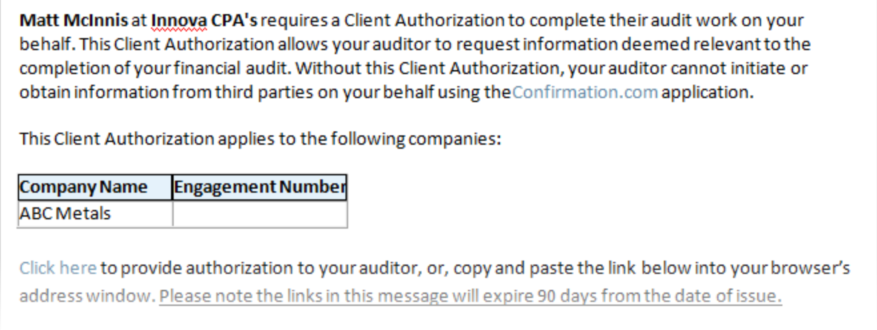


Step 4: Request Client Authorization

Once you've added all your accounts, you can request client authorization for your client:



Your client will receive an email from Confirmation.com asking them to provide their authorization to their bank and other parties to disclose information through Confirmation.com.



Matt McInnis at **Innova CPA's** requires a Client Authorization to complete their audit work on your behalf. This Client Authorization allows your auditor to request information deemed relevant to the completion of your financial audit. Without this Client Authorization, your auditor cannot initiate or obtain information from third parties on your behalf using the Confirmation.com application.

This Client Authorization applies to the following companies:

Company Name	Engagement Number
ABC Metals	

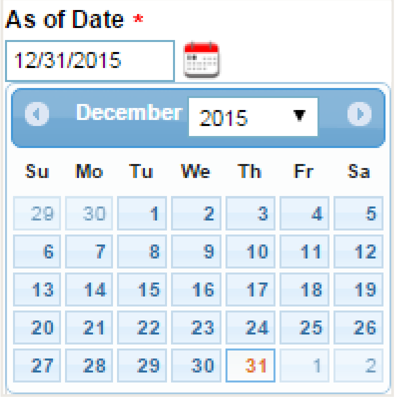
Click here to provide authorization to your auditor, or, copy and paste the link below into your browser's address window. Please note the links in this message will expire 90 days from the date of issue.

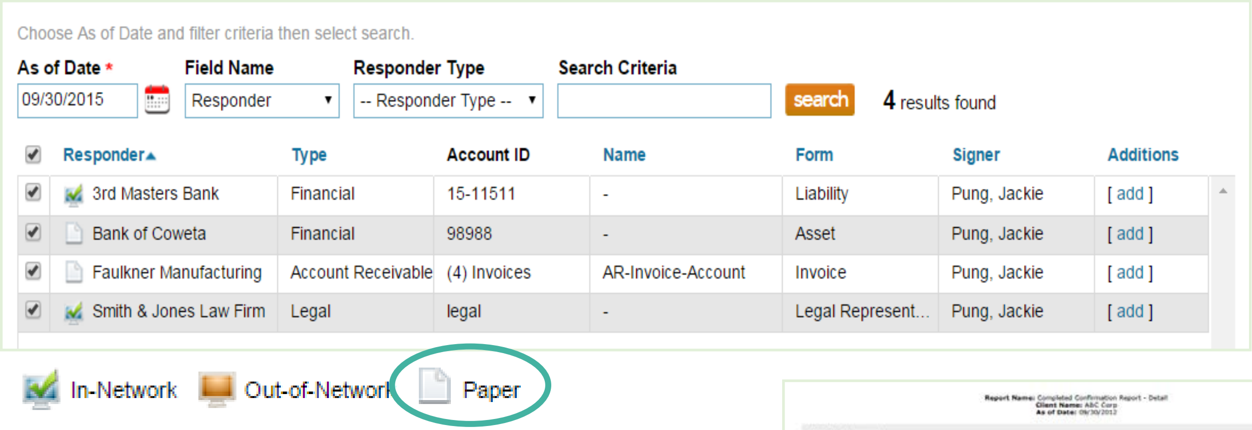
Your client must follow the email link and digitally sign the authorization.

The process takes less than 30 seconds to complete.

Step 5: Initiate Confirmations

Confirmation requests are sent to their intended recipients. The icon next to the responder's name shows how it will be delivered. If you choose a responder with a paper icon the cost will be free until March 31, 2016. For bank confirmations, recipients have the option to respond online in addition to mail.





Step 6: Track and Print Responses

All confirmations are tracked and responses uploaded to electronic workpapers.