

Quick Start Guide for Client Authorization

The Confirmation.com application provides auditors and their clients a secure and efficient means for obtaining the necessary client authorization to initiate audit confirmations. The below guide describes the electronic process for requesting and submitting client authorization within the Confirmation.com application.

Establishing a Client Profile (Auditor)

After registering for Confirmation.com, the auditor will establish a Client Profile, designate an authorized signer, then enter the necessary client account information.

Requesting Authorization (Auditor)

From within the Confirmation.com application, the auditor will request client authorization for the selected authorized signer.

This process generates an email from **systems.administrator@confirmation.com** to the client email address provided by the auditor. This email contains a secure link allowing the client to provide the necessary approvals.

Providing Authorization (Client)

From within the authorization email, the Client Signer will select the secure link. This will display a unique authorization page containing important information about the Client and the Firm.

From within the Client Authorization view, the Client Signer will complete the Signature step by signing their name in the space provided. The signature step can be performed by using a mouse, trackpad, or a stylus/finger on touchscreen devices.

A signature can be cleared or typed using the links located above the signature area.

Once completed, select the Send button located at the base of the Signature area to return the authorization to the auditor.

To learn more contact us at **1-888-716-3577** or visit **Confirmation.com**

The screenshot shows the Confirmation.com dashboard for a user named Sally Jones. The dashboard is divided into several sections: CLIENT PROFILE, ACCOUNTS, CLIENT AUTHORIZATION, INITIATE, CONFIRMATION STATUSES, and DOWNLOAD. The CLIENT AUTHORIZATION section is highlighted, showing a list of received and pending authorizations. The ACCOUNTS section shows a list of accounts with their respective balances. The CONFIRMATION STATUSES section shows a list of confirmation statuses with their respective counts.

The screenshot shows the content of a Client Authorization email. It includes a header with the user's name and company, a paragraph explaining the purpose of the authorization, a table of companies to which the authorization applies, a link to provide authorization, and a section for the auditor's information.

Sally Jones at Sample 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
Test Co.	12345678

[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.

<https://qa2.confirmation.com/SendAUDToAuditorModal.aspx?stmc=LhmGllwSWg%3d&aid=Ygt8wKOMQuU%3d&cid=2vWgAm6%2bCWo%3d&lid=gYo8Y6bags0%3d&uid=QscHTUakfh4%3d>

YOUR AUDITOR INFORMATION:

The screenshot shows the Client Authorization signature screen. It includes a header with the user's name and company, a paragraph explaining the purpose of the authorization, a signature area with a signature, and buttons for cancel and send. Below the signature area are sections for Contact Information, Company Information, and Firm Information.

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*

Sign It Type It Clear Signature Tutorial

John Doe

cancel send

Contact Information
John Doe
john.doe@testco.zzz

Company Information
Test Co.

Firm Information
Sample CPA's
Sally Jones
sally.jones@samplecpa.zzz

