Confirmation.com

Creditor User Guide

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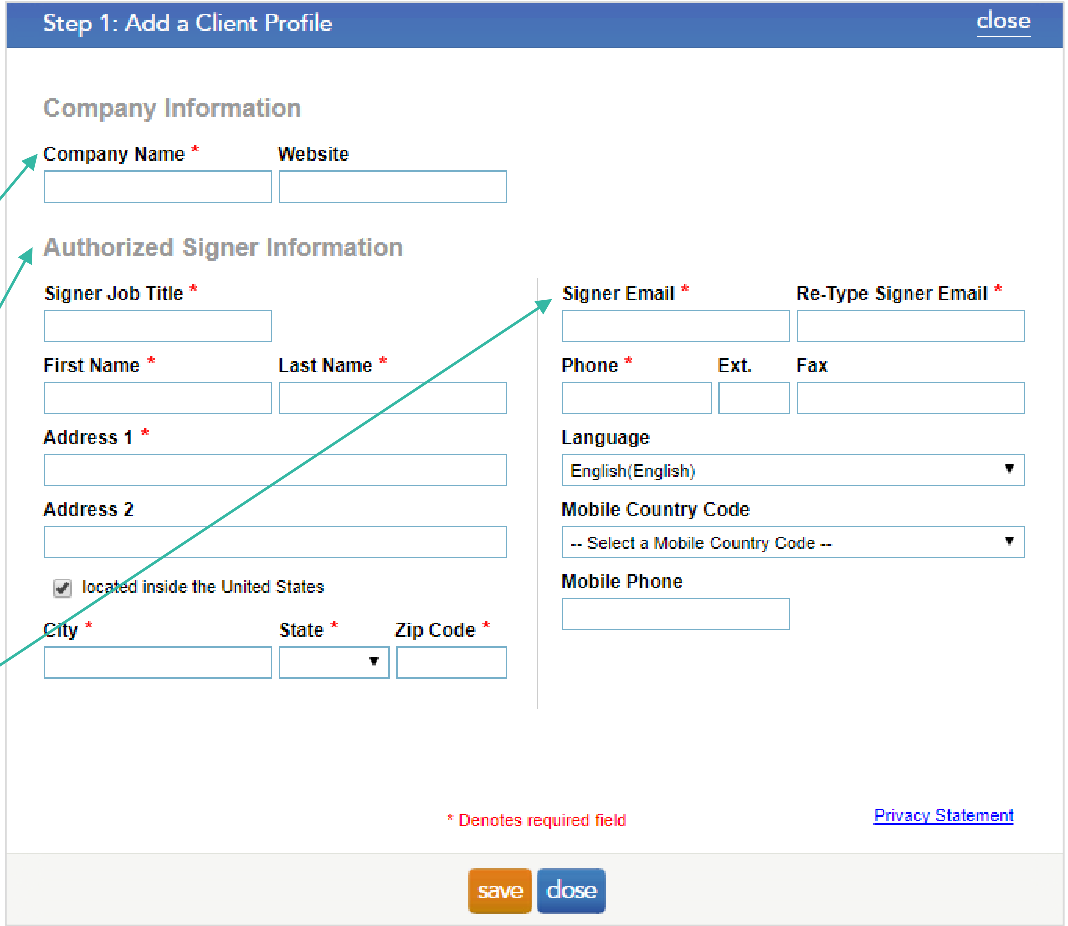
Step 1: Adding a new client

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.



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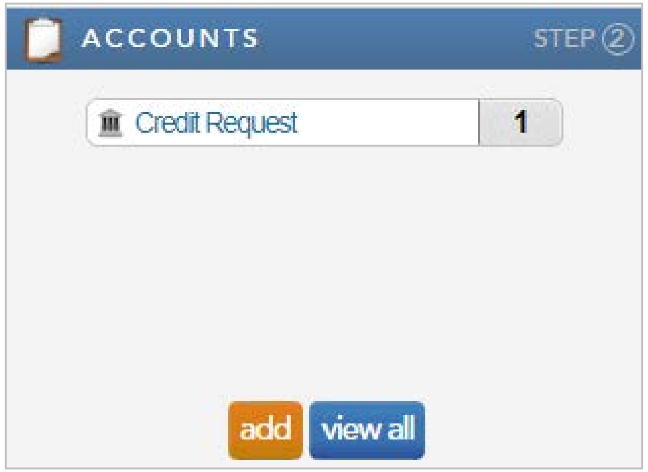
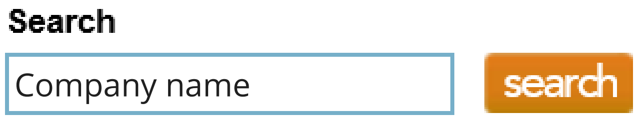
Step 2: Add accounts – choosing the request type

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

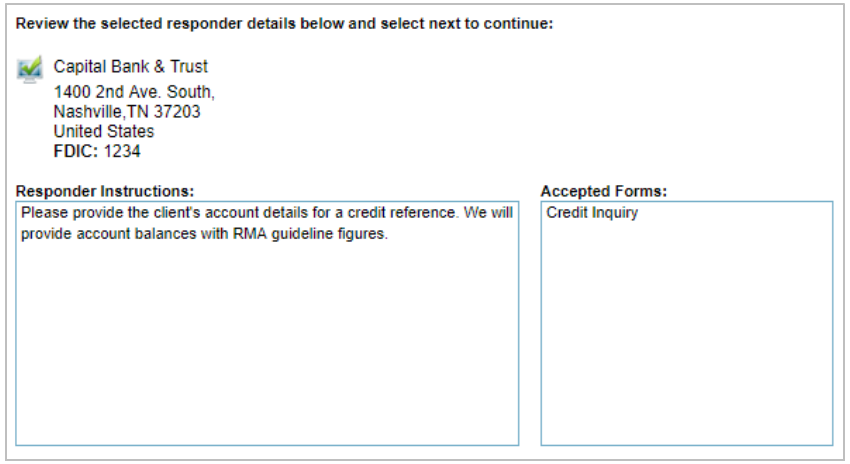


Search for the responding financial institution. Once found, click to select.



On the next screen, make sure to read 'Responder Instructions' issued by the financial institution and take note of the 'Accepted Forms.'

**These are the types of confirmation requests the selected financial institution will respond to.*



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Step 2: Add accounts – choosing the request type

Credit Inquiries

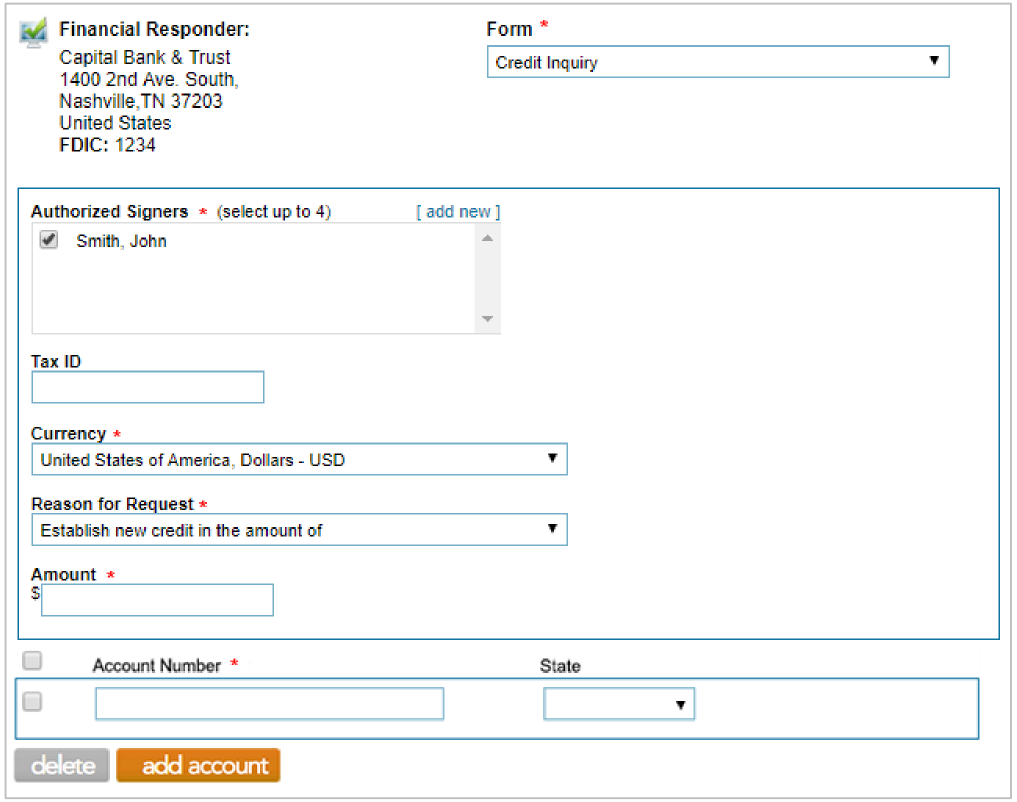
- Complete the required details in the Credit Inquiry form.

**Some financial institutions may require Tax ID.*

Cost

- $15 and up, varies by financial institution.

Example Credit Inquiry form



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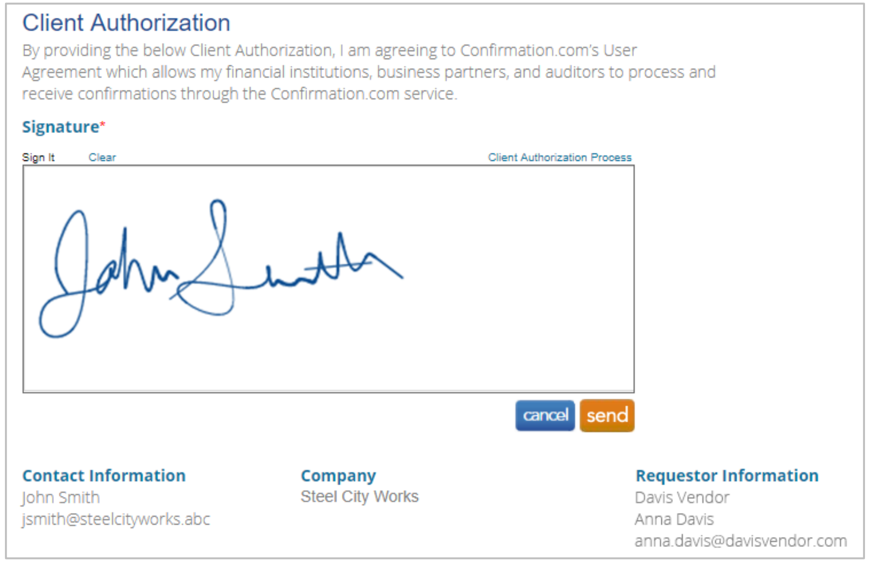
Step 3: Requesting client authorization

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

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

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



The process takes less than 30 seconds to complete.

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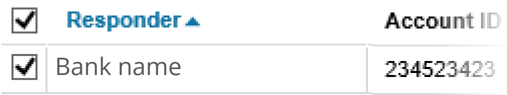
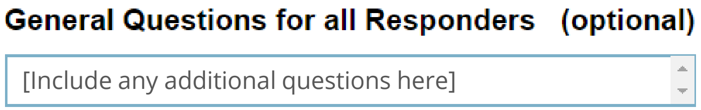
Step 4: Initiating your confirmations

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

Select which accounts/forms you wish to confirm.



Add any other questions, if needed.



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Step 4: Initiating your confirmations

Once you are ready to send your confirmations, your total fee is calculated.

You will be asked to pay at this point with the credit card on file.

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

Billing Summary

1 accounts selected.

Responders ▲	Type	Quantity	Price Per	Amount
Bank Name	Credit Request	1	$15.00 USD	$15.00 USD
Subtotal		1		$15.00 USD
Sales Tax/VAT				$0.00 USD
Total		1		$15.00 USD

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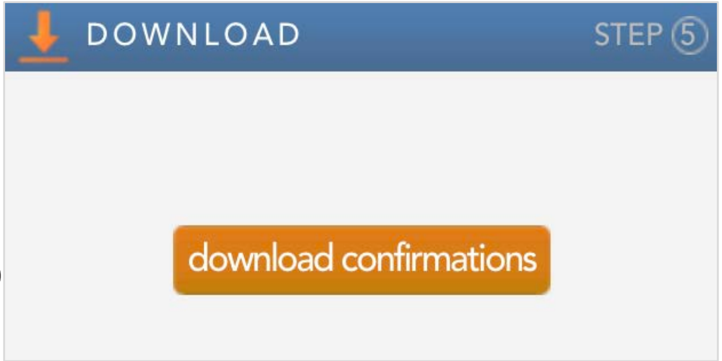
Step 5: Download your confirmations

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 records.

Recalling confirmations

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

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.

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Need help?

Contact our customer support team at

contact.confirmation.com/support

1-866-325-7201

Confirmation.com

Thank you for using Confirmation.com