



How to use Confirmfast.com

AUDIT CLIENT'S USER MANUAL

Step 1 - Registration Process:

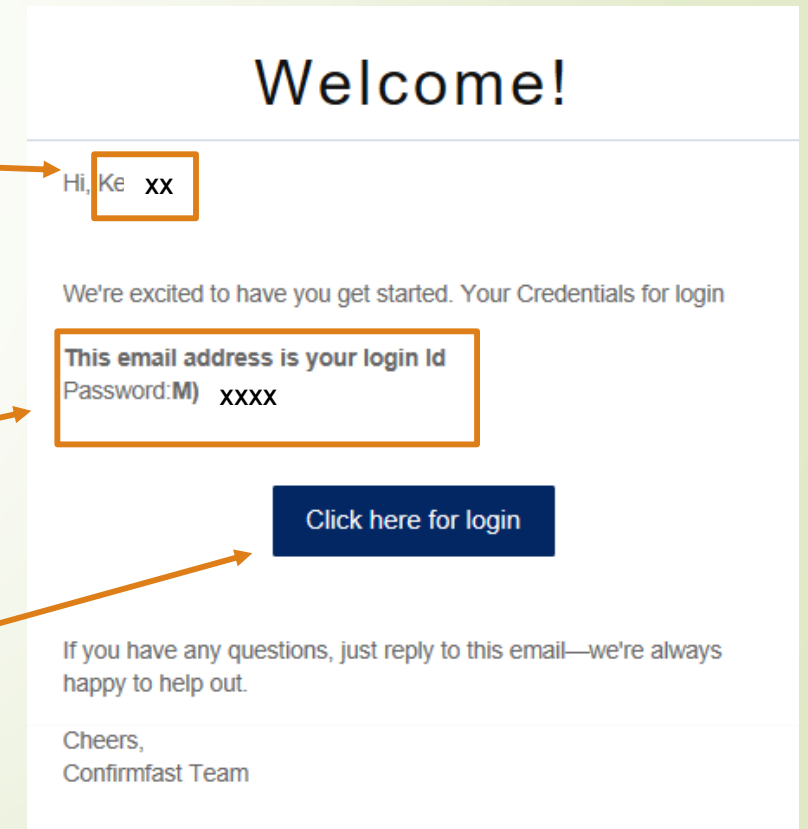
- The Auditor will first add your Firm as his Audit Client, and then add the contact details of the Client Administrator.
- You will receive the following email from Confirmfast.com after your Auditor has successfully added you as his Audit Client:

- E-mail will be addressed to the Client Administrator
- Email will be sent to the ID mentioned by the auditor while adding the “Client Administrator” details

1: User ID – Your Email ID on which you received the Email

2: Temporary Password – Mentioned in the Email

3: Click on the button to log into “**Confirmfast.com**”



Step 1 - Registration Process (Cont.):

LOG IN / SIGN IN

Email

Password

[Forgot Password?](#)

Remember me on this computer

LOG IN

1: Use the Login credentials mentioned in the Email received from Confirmfast.com.

2: Click on “Begin Tour” button to have detail walkthrough on how to use Confirmfast.com to provide authorization to your Auditor to raise Bank Confirmations

Welcome to Confirmfast.com!

Hello K€ XXXXXXXX

We are excited to have you with us and will guide you in understanding how this website works for helping your auditors in raising and receiving bank confirmation letter for your ongoing statutory / internal audit.

Do not show again

Close [Begin Tour](#)

Step 2 – Provide Authorization for seeking Confirmations :

You will receive an Email from Confirmfast.com when your Auditor has added the details of Bank Account which needs to be confirmed for audit procedures. Your auditor will add the following information:

- Bank Account Number
- Bank Name
- Type of Account

This section will mention the details of the your Auditor like:

- Auditor's Name
- Auditor's contact number
- Auditor's Email ID
- Bank Account added by your Auditor

1: Click on the button to provide the authorization to your Auditor.

It is important to note that without your authorization, your auditor will not be allowed to initiate electronic confirmations on Confirmfast.com

The screenshot shows an email interface with the following elements:

- Header:** "Welcome!"
- Greeting:** "Hi, Ke xxxxxxxxxx" (with a callout box around the name and email).
- Message Body:** "Your Auditor First Last has added a new account(s) for Confirmation. We have received a request for balance confirmation from your Auditor First Last, having following mobile number and email:-" (with a callout box around the entire paragraph).
- Table:** A table with two rows: "Mobile (Verified) 7018251762" and "Email (Verified) info@corpusconsulting.in" (with callout boxes around the values).
- Text:** "If you agree that First Last is your auditor, then kindly verify and approve the following bank account(s) by logging in the confirmfast.com through the link provided below:"
- Table:** A table with two rows: "Indian Bank (India) - Bank" and "123 XXX 789" (with a callout box around the values).
- Button:** "Click here for login" (with a callout box around the button).
- Footer:** "If you have any questions, just reply to this email—we're always happy to help out. Cheers, Confirmfast Team"

Step 2 – Provide Authorization for seeking Confirmations (Cont.):

This section will show the details of Bank Accounts added by your Auditor along with the details of date and time.

The status will show “Not Verified” until you have completed the process of providing Authorization request

Accounts for Authorisation

i Please note that whenever you authorize the auditor, we do not need your transaction passwords and ONLY login credentials are required. These login credentials are not stored or archived in any way by us or nor are they transmitted to the auditor for any purposes.

Name of the Bank	Account number	Requested on	Status	Expiry	Action
XXXXXX - Bank	XXXXXX	XXXXXX :11 PM	Not Verified		AUTHORIZE

1: Click on “Authorize” button to initiate the process of providing Authorization validity

Step 2 – Provide Authorization Approval (Cont.):

1: Click on the drop down to select the validity period for Auditor to raise confirmations. Validity period range is:

- 1 Day
- 7 Days
- 15 Days
- 30 Days

Upon expiry of this validity period, the auditor will be unable to raise confirmations and will reach out to you again for approval

2: Click on “I agree” button to be re-directed to the highly secured “Bank’s Open Financial Exchange Server”. Refer to “FAQs from Clients” on our website to know more about Bank’s Open Financial Exchange Server

Account Confirmation

Select the validity of this approval for the auditor

validity of this approval

- 1 day
- 7 days
- 15 days
- 30 days

DENY THE REQUEST

SUBMIT

Information Alert

You are being re-directed to the Bank's Open Financial Exchange page, where you will have to input your login ID and password (not your Transaction password) for generation of confirmation report. Please note that Confirmfast Communications Private Limited does not store/view your login ID and password.

Kindly select 'Agree' in case you wish to proceed.

Disagree

I Agree

Step 3 – Linking of Bank Accounts:

1: Enter your Bank's Login ID and Login Password on the "Bank's Open Financial Exchange Server" to proceed with linking of accounts


IMPORTANT NOTE:

- Please note, your Login ID and Login Password will not be stored by Confirmfast Communications Private Limited. It is just a medium to connect your bank accounts to the "Bank's Open Financial Exchange Server" to prepare the Final Balance Confirmation Report.
- Your data can neither be viewed, or stored by your Auditor or Confirmfast Communications Pvt. Ltd.
- The Final Balance Confirmation Report generated does not mention any Login credentials.

Link Accounts

Please enter your Indian Bank (India) online account credentials.

LOG IN TO YOUR ACCOUNT

 Indian Bank (India)
www.indianbank.in


Login User ID



Login Password [SHOW](#)

Visit your [financial institution's site](#) to retrieve or create your username and password. This will open a new window.

[SUBMIT >](#)

By providing your credentials, we verify in real time that you own the account you want to link. We then use this information to establish a secure connection with your financial institution.



Security certifications obtained from "Thawte" and "TrustE" for Confirmfast.com. Refer to our "Security FAQs" to know more about our security best practices.

Step 3 – Linking of Bank Accounts (Cont.):

1: Select the account that for which you would like to provide the authorization to your Auditor

Please select you account number () from below for which you want to authorise the Auditor

Account number	Type	Current Balance	Last Updated
<input type="checkbox"/> xxxx7782	bank	XXXXXX 2 INR	XXXXXX
<input type="checkbox"/> xxxx7782	bank	XXXXXX 2 INR	XXXXXX

After the authorization request is approved following screen will appear on your Dashbaord:

1: Status now stands “Approved”

Accounts for Authorisation

Please note that whenever you authorize the auditor, we do not need your transaction passwords and ONLY login credentials are required. These login credentials are not stored or archived in any way by us or nor are they transmitted to the auditor for any purpose.

Name of the Bank	Account number	Requested on	Status	Expiry	Action
Indian Bank (India) - Bank	123456789	8/2/2018 5:04:11 PM	✓ Approved	8/9/2018 5:51:31 PM	ACTION

2: You can view the validity of the Authorization Request you have provided

3: You have now successfully completed the procedure of providing Authorization Request to your assigned Auditor. You may log out from Confirmfast.com.