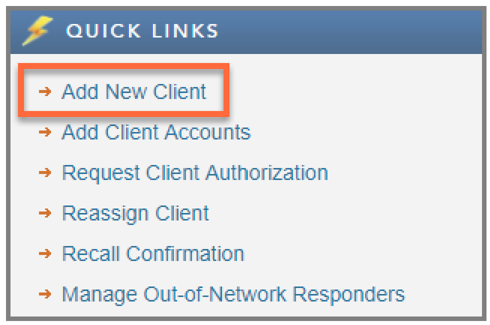
Creditor User Guide

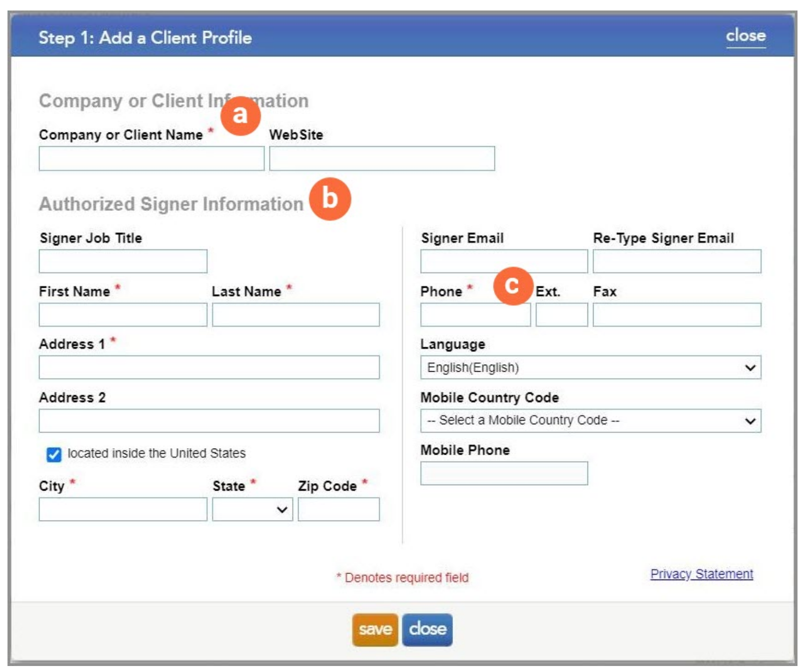
This guide provides instructions on how to send Credit Inquiry requests through the Confirmation platform.

Add a New Client

1. From the dashboard, click **Add New Client**.



2. Enter the required information, indicated by a red asterisk.
   a. Company or Client Name* - the legal entity/registered company name
   b. Signer Information - must match the financial institution's information on file for the client
   c. Signer Phone - For the Phone field, use 555-555-5555. You do not have to have the borrower's real phone number

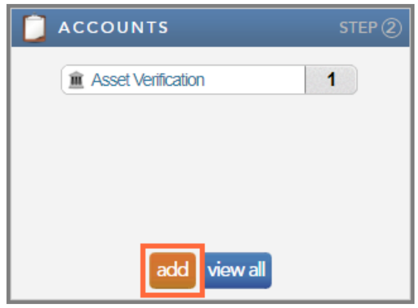


*Please ensure you enter the full legal entity or registered company name.

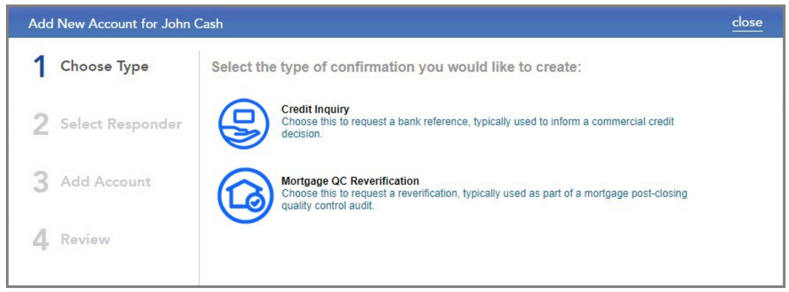
3. Click **save.**

Add Accounts

1 Click **add** under Accounts (Step 2).

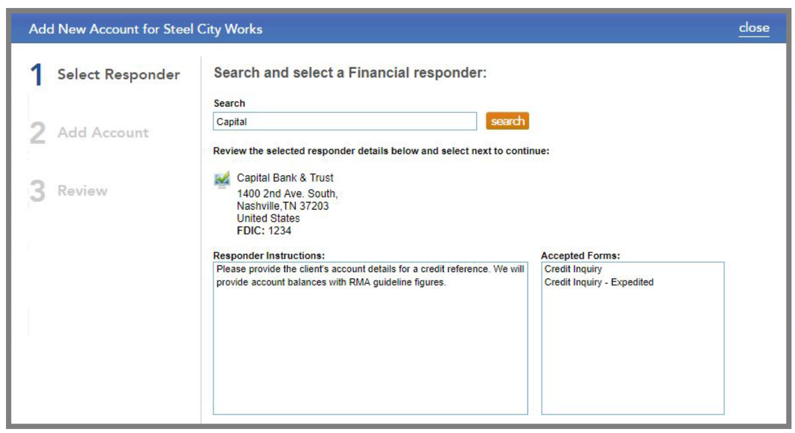


2 Select **Credit Inquiry**.



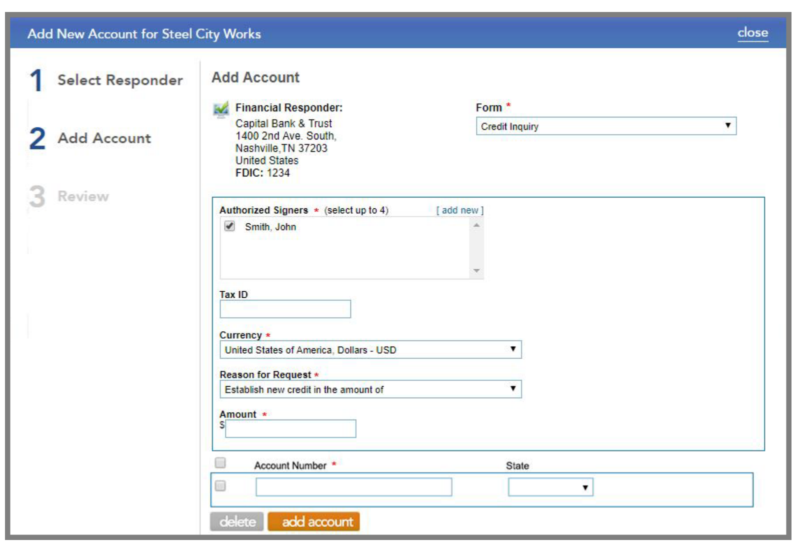
3 Search for the desired financial institution; click to select.

4 Read **Responder Instructions**, if any, and take note of the Accepted Forms.



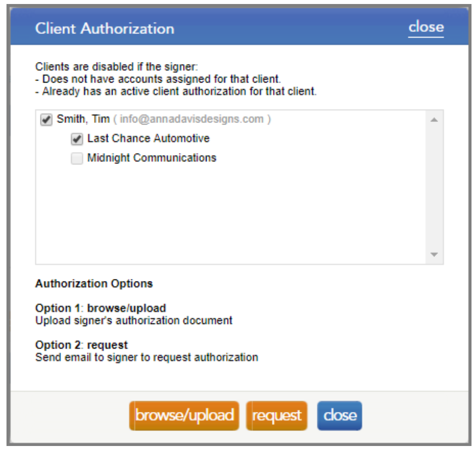
5 Complete the required fields for the **Credit Inquiry** Form.

NOTE: Some financial institutions may require the Tax ID.



Requesting Client Authorization

1. Click **request** under Client Authorization (Step 3).



2. Select the correct authorized signer(s) and click **browse/upload** to upload the signer's authorization document OR click **request** to send an email to the signer to obtain his/her electronic signature.

If you click request, your client will receive an email from Confirmation requesting his/her authorization for the financial institution to disclose information through the Confirmation platform.

Your client must follow the link in the email to digitally sign the authorization. The process takes less than 30 seconds to complete.

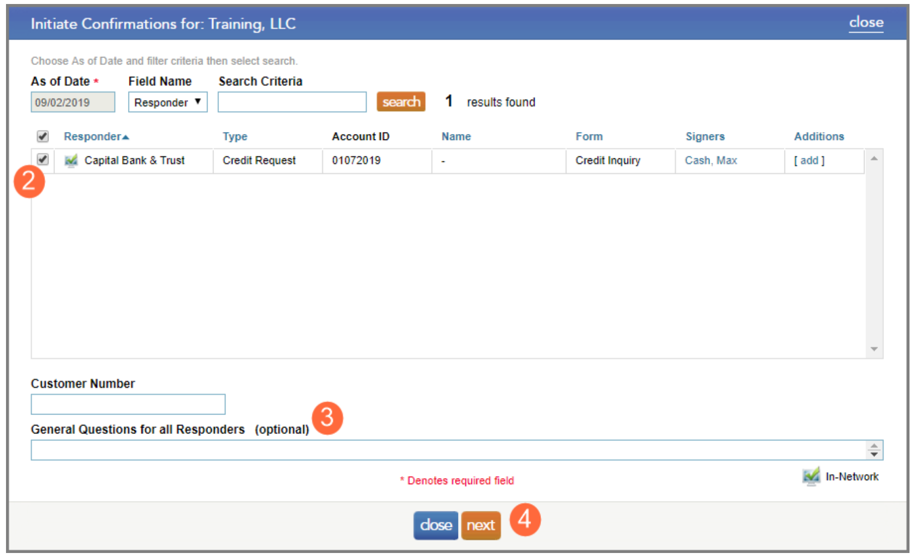
Initiating Confirmations

1. Once you have received the client authorization, click the **initiate confirmations** button under Initiate (Step 4).

2 Select/deselect the accounts/forms to confirm.

3 Enter additional questions in the **General Questions for all Responders** field, if needed.

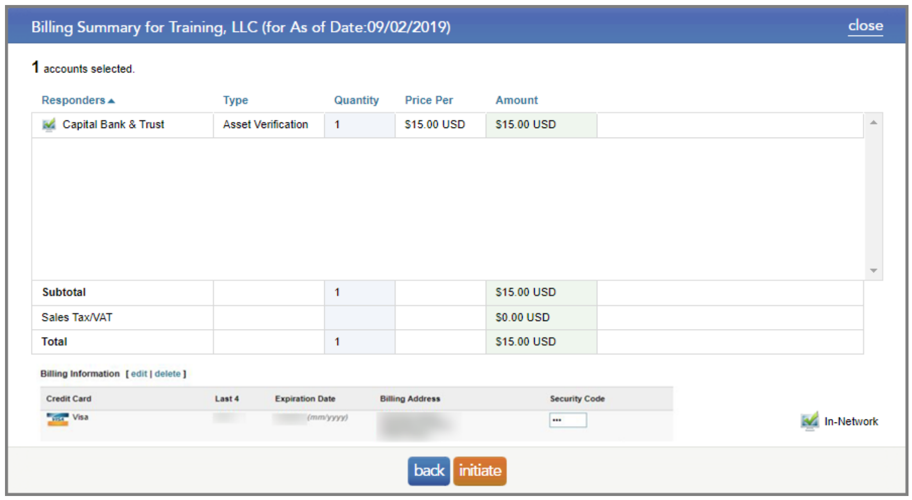
4 Click **next.**



5 View the **Billing Summary** and enter payment information; click **initiate.**

Cost varies by financial institution. $15 and up.

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



Downloading Completed Confirmations

1 When the financial institution completes the confirmation, you will receive an email notification.

Log in, navigate to your client and click **completed confirmations** under Download (Step 5).

Need help? Contact our customer support team:

- 1-866-325-7201