

American Express @ Work^{®1} Global Apply for Card (GAFC)

USER GUIDE FOR PROGRAMME ADMINISTRATORS



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BEFORE YOU BEGIN

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Checklist

- > Decide who should have access to GAFC
- > Define your application process
- > Selecting the right process journey
- > Decide how employees will access the application form
- > What is an Access Key?
- > Create Access Keys
- > Transitioning your organization to the new digital system
- > How to enrol
- > Navigating critical functions





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BEFORE YOU BEGIN

INITIATING A CARD APPLICATION

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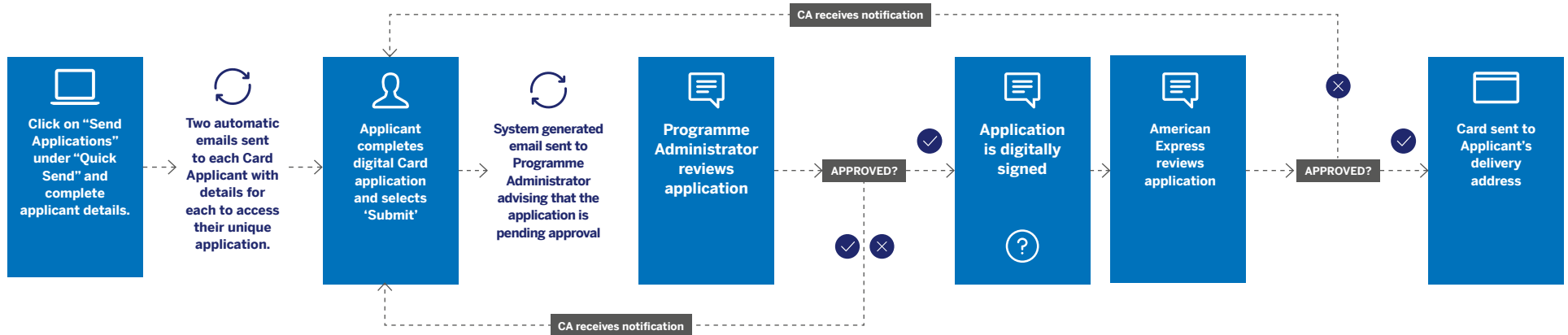
TRACK A CARD APPLICATION

CARD APPLICANT EXPERIENCE

Global Apply for Card Journeys

Quick Send appears in the middle of the GAFC "PA dashboard" landing page. When you do not need an Access Key, this option lets you quickly initiate up to 10 applications at one time.

QUICK SEND



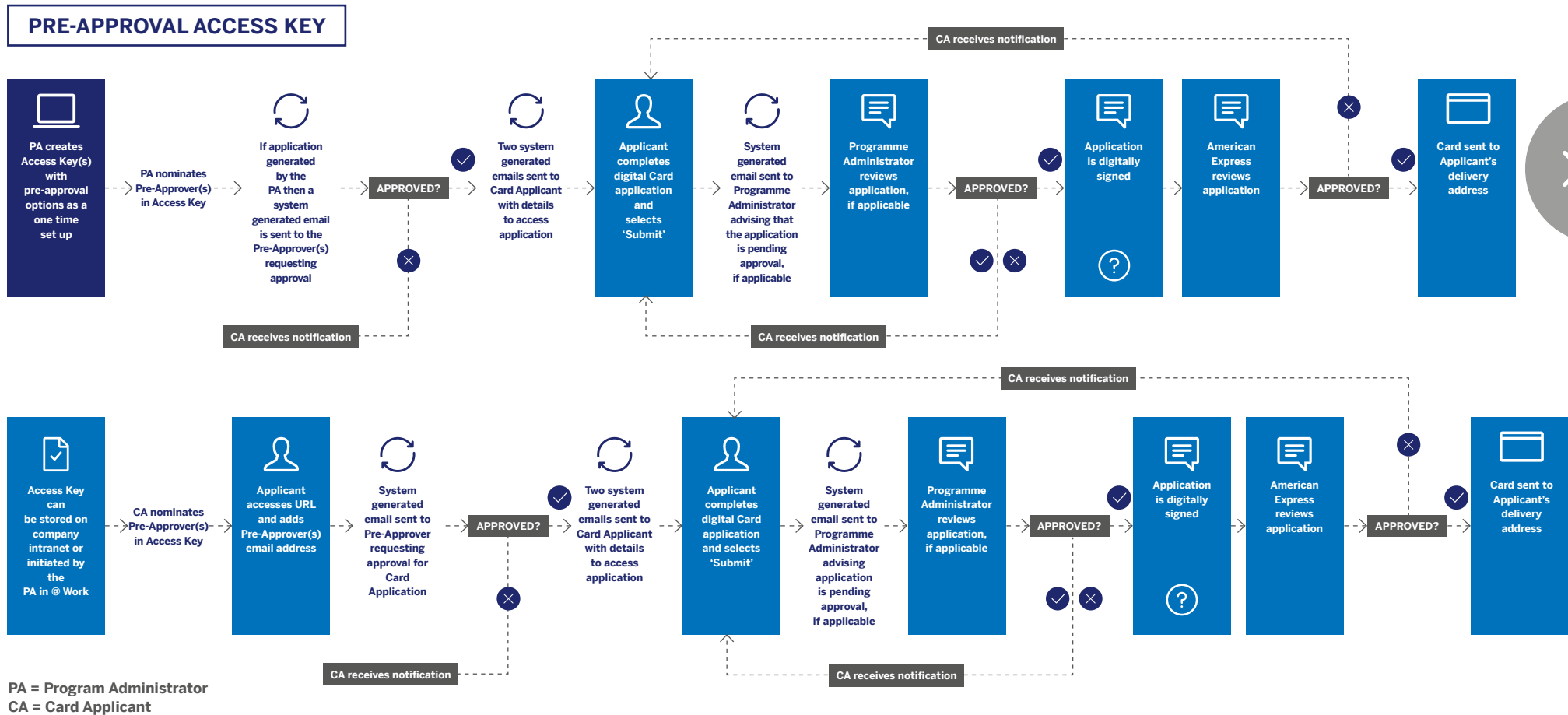
PA = Program Administrator
CA = Card Applicant



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- TRACK A CARD APPLICATION
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Global Apply for Card Journeys

Access Keys can be set up with the ability to pre-approve applications before employees complete them in addition to post-approval, if required. Card Applicants can also nominate up to three individuals who needs to pre-approve their application.





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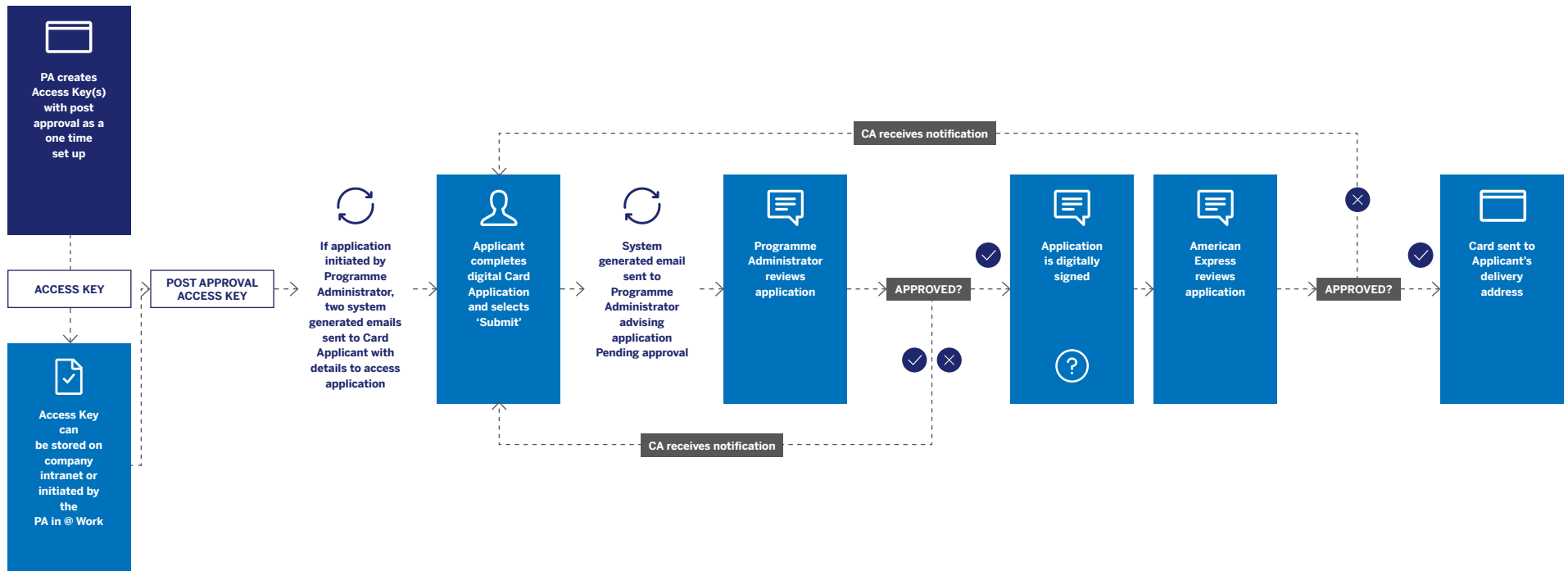
TRACK A CARD APPLICATION

CARD APPLICANT EXPERIENCE

Global Apply for Card Journeys

When post approval is not automatically required, the Programme Administrator has the option to create an Access Key that requires the Card Application to be approved once the Applicant has completed the form. This is the final step before the system sends the form to American Express for processing.

POST-APPROVAL ACCESS KEY



PA = Program Administrator
CA = Card Applicant

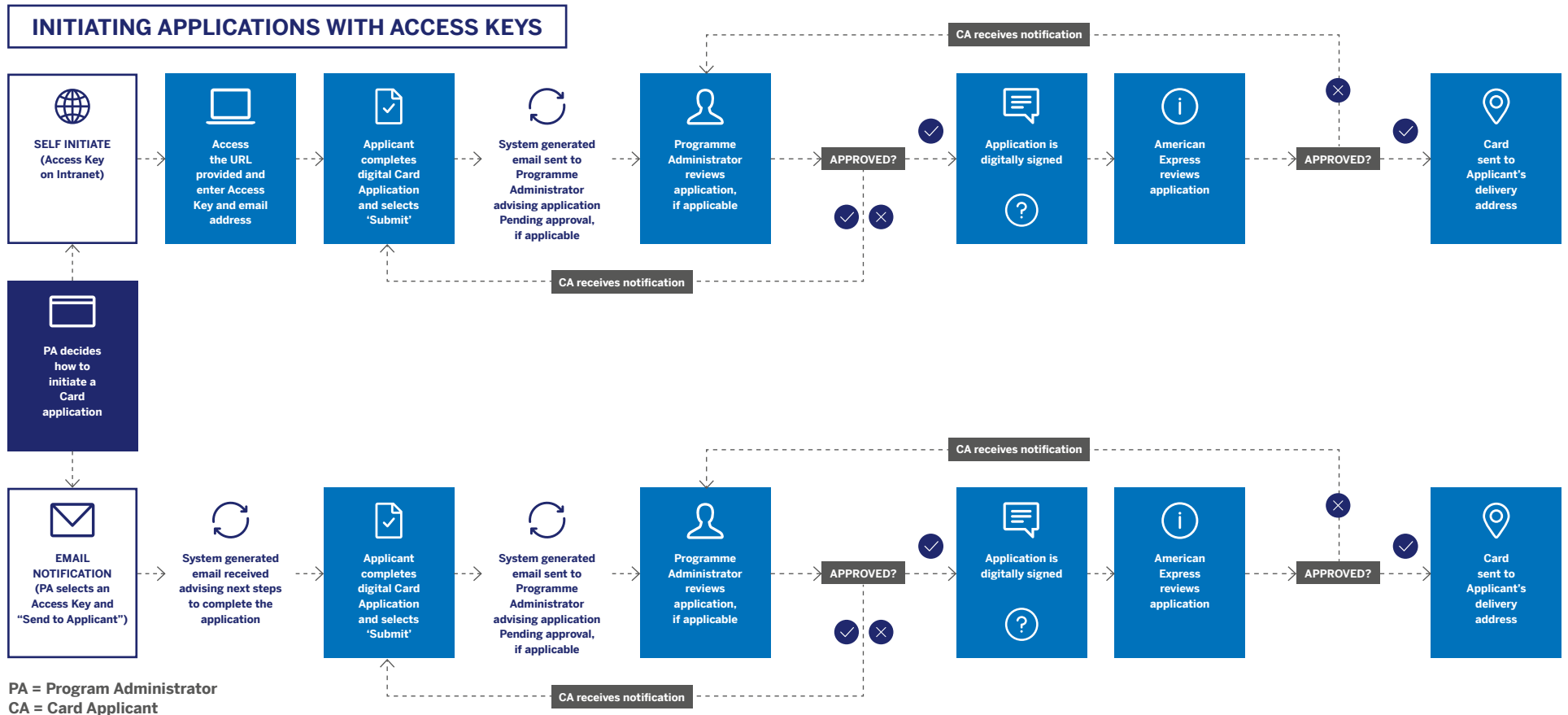


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Which experience suits your business needs?

Programme Administrators can choose to initiate Card Applications with an Access Key each time, or they may publish the Access Key and Card Application URL on their company intranet. With either method, the Programme Administrator must provide final approval if required.

Card Applicants can self-initiate Card Applications by using the URL and Access Key provided by the Programme Administrator.





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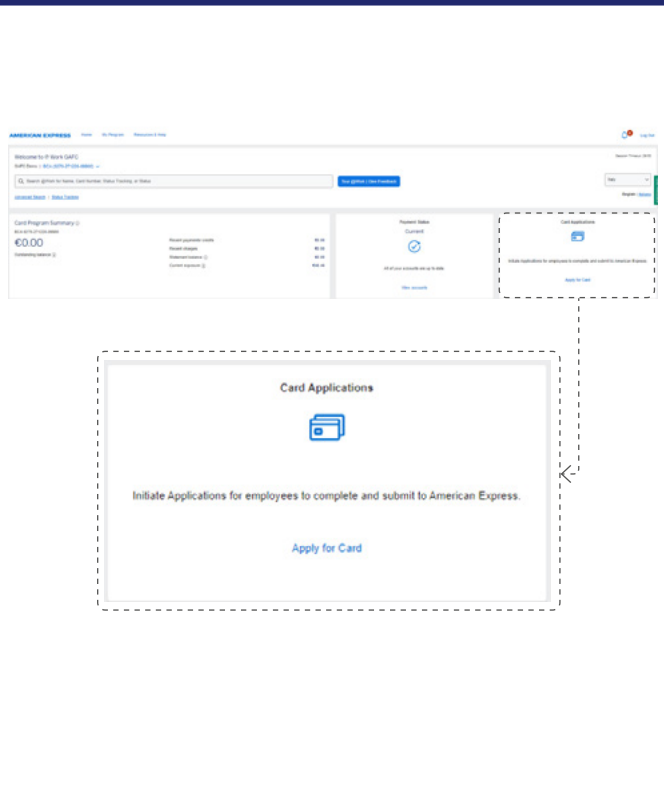
Navigating critical functions > Creating an Access Key > Initiating a Card Application

Navigating critical functions

Navigate to the relevant screens to initiate the most critical tasks quickly and easily.

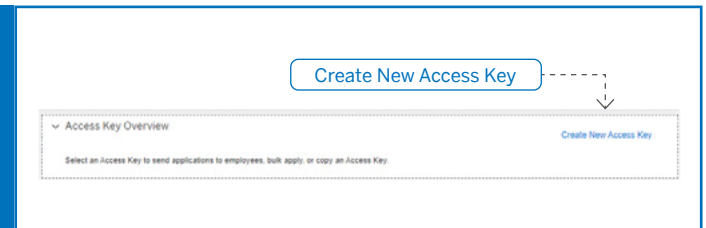
EASILY ACCESSIBLE

Click on Apply for Card on the @ **Work Homepage** to link directly to the related screen.



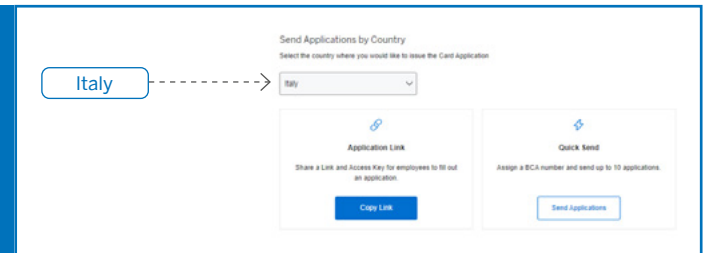
1 CREATE ACCESS KEYS

Within the Access Key Overview section, select Create New Access Key to initiate the process.



2 INITIATE APPLICATION

In the **Send Applications by Country** section, select **Italy**. Then either choose **Quick Send**, or to initiate with an Access Key copy the **Application Link** and click **Send to Applicant**.



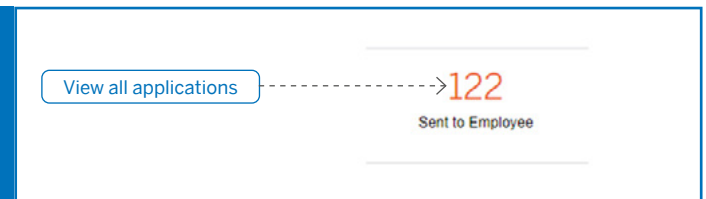
3 APPROVE APPLICATION

Click on the number above **Ready for Approval** under **Italy Application Tracking** to quickly approve, edit, route the application back to applicant, or Cancel.



4 TRACK APPLICATION

Click on the number above **Sent to Employee** to view all Card Applications and the status of each.





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Navigating critical functions > Creating an Access Key > Initiating a Card Application

Creating an Access Key

An Access Key will enable you to mandate fields, select field length, customize application approval workflows to your needs and set other constraints on all Card Applications initiated using this Access Key.

1 SELECT BASIC CONTROL ACCOUNT

Within the **Create New Access Key** screen, start typing for suggested results or select the desired Basic Control Account (BCA) from the drop down.

2 CUSTOMIZE ACCESS KEY

Type a unique **Access Key Name** and select the constraints you wish to have appear for all applications associated with this Access Key.

3 + 4 REVIEW & CONFIRM

Ensure all details are correct and select **Continue** then **Submit**. Your Access Key is now ready to use.



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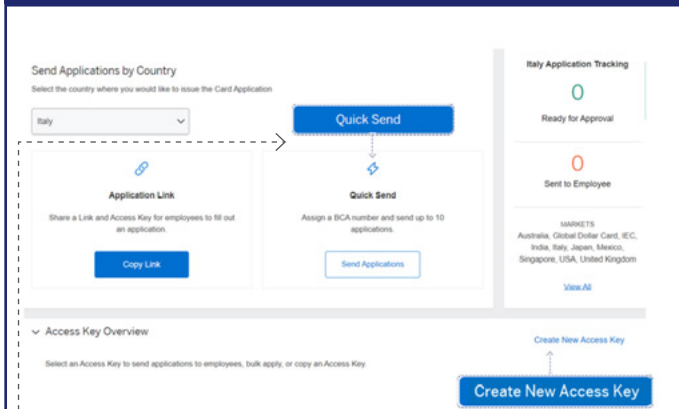
Navigating critical functions > Creating an Access Key > Initiating a Card Application

Initiating a Card Application

Either select Quick Send to initiate applications without an Access Key, or select the Access Key you want to associate with the application.

FLEXIBLE INITIATION PROCESS

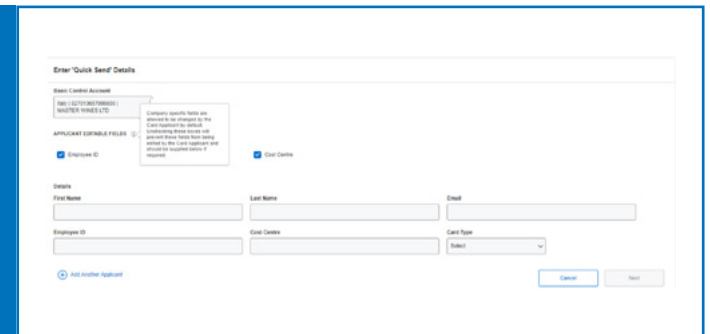
Select **Quick Send** or select an Access Key then click on **Send to Applicant** button.



In Italy, applications initiated with Quick Send require post approval by the Programme Administrator.

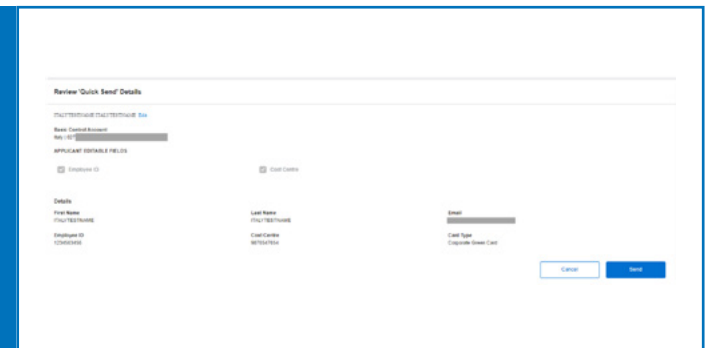
1 ENTER EMPLOYEE DETAILS

If **Quick Send**, enter the **Basic Control Account number (BCA)** and relevant **employee contact** details including email address.



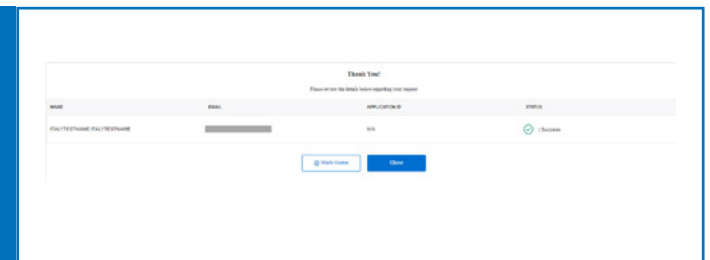
2 REVIEW & SUBMIT

Ensure all details are correct before clicking **Submit**. Click **Edit** to make changes if needed.



3 REVIEW & CONFIRM

The system will confirm the Application ID and automatically send an email invitation to the Applicant. The Application ID is required to log into the digital form and is automatically sent in a second email.





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Approve a Card Application

When you review a summary of the application, you can choose to approve, edit, route it back to the Card Applicant for further details, or cancel (decline to proceed with) the application.

1 REVIEW APPLICATION

Select the **arrow** on left of the application to see summary. The number of **applications Ready for Review** will appear at the top.

Search by employee name, email, employee ID, application ID, or bulk tracking ID

For Card Applications in Australia, India, Italy, Japan, Mexico and Singapore only Authorized Signatory / Legal Representative can approve.
For applications past 60 days, use the Date Range filter to view more results.

Country: 1 selected | Date Range (Start Date - End Date): 2023-06-10 - 2023-06-09

1 selected | Cancel

DATE INITIATED	APPLICANT NAME	APPLICANT EMAIL	CARD TYPE	APPROVAL TYPE
2023-07-20	FIRST LAST		Corporate Green Card	Standard
2023-07-20			Corporate Green Card	Standard

APPLICATION ID: 1234567890

RESIDENTIAL ADDRESS: 21012 33E 12312 7642

ACCESS KEY NAME: ONLY

EMPLOYEE ID: 4567890

ICANUMBER: 12312456

COAST CENTRE: 12312456

ICANAME: JOHN C 417DE

DATE OF BIRTH: 1987-11-11

ICANUMBER: [REDACTED]

CARD & STATEMENT DELIVERY: [REDACTED]

NATIONALITY: ITALY

ICANAME: SPRING PERSONNEL

File Attachments: TESTDocument.pdf

Approve Cancel Edit Route To Applicant

2 CHOOSE YOUR ACTION

Select from one of the actions to the right of the application summary. You may also **view the Applicant's attachments**.

Approve

Cancel

Edit

Route To Applicant

3 REVIEW & CONFIRM

A pop up will ask you to confirm your selection. This change to the application will be reflected in the **Tracking Status** screens.

Approve Applications

Would you like to approve the following Card Application?

APPLICANT NAME: [REDACTED] EMAIL: [REDACTED] APPLICATION ID: IT-8155V0V07E7V

I certify that the original documents attached to this application belong to [REDACTED] and I attest as employed by [REDACTED].

To approve and submit the application, you and your applicant must digitally sign. Please provide an email to receive instructions to complete the digital signature and a phone number that will serve as your password for the digital signature portal. The card applicant will receive email instructions to sign as well since you have requested their application.

First Name: [REDACTED]

GAFC: [REDACTED]

Last Name: [REDACTED]

Ln: [REDACTED]

Birth Country: Select

Required Email Address: [REDACTED]

Mobile Phone Number: +1 [REDACTED]

Go Back Confirm

I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to advise you of any changes therein, immediately, to ensure any of the above information is found to be false or untrue or misleading or misrepresenting. I am aware that any such false false for a

Only the Authorized Signatory/Legal Representative CAN APPROVE Card Applications in Australia, India, Italy, Japan, Mexico, Singapore. If you are not authorized to approve applications on behalf of your Company, this application will not be processed by American Express.

Go Back Confirm



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Sign a Card Application > Sign a Card Application (continued)

Sign a Card Application

A digital signature is always required in Italy, but depending on the settlement type your company has selected for your Card program, the requirements will vary. The Card applicant must always sign, but the Programme Administrator only signs for central settlement accounts.





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Sign a Card Application > Sign a Card Application (continued)

Sign a Card Application (continued)

Once a Programme Administrator has approved a Card application, if required, the Card Applicant and the Programme Administrator (for central settlement only) will receive an email with a link to digitally sign the application.



RECEIVE DIGITAL SIGNATURE EMAIL

Click the button in the email that says "go to document and sign" to be taken to the digital signature landing page.



Firma digitale.

Completa la tua richiesta Carta con la firma digitale che è semplice, veloce ed ecologica.

Gentile Test Test,
per completare la richiesta Carta Corporate American Express con il codice identificativo IT-S1020856AUK2 è necessaria la tua firma.

Prima di procedere alla sottoscrizione del contratto, ricordati di prendere visione delle condizioni contrattuali a te applicate [cliccando qui](#).
Ti ricordiamo che è disponibile la Guida sui diritti dei pagamenti effettuati in Europa che puoi verificare in autonomia [cliccando qui](#).

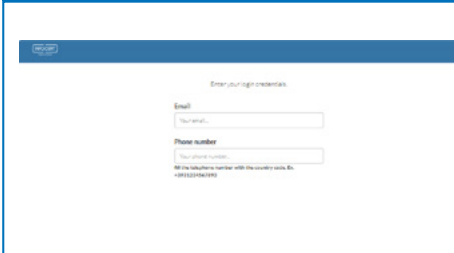
Dopo aver riletto il contratto procedi con la firma digitale.
Ti ricordiamo che hai tempo fino al 10-11-2023 per completare la procedura ed evitare che i dati inseriti vengano cancellati.

[Vai al documento e firma](#)

Servizio Nuovi Clienti
American Express Italia S.r.l.

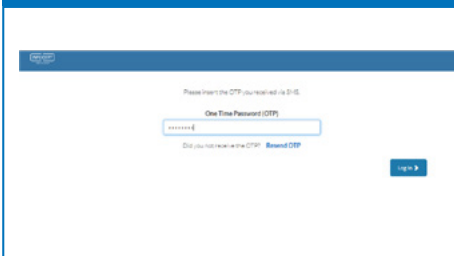
1 ENTER LOGIN CREDENTIALS

For the Card Applicant this will be the email and the phone number they provided in the application process. For the Programme Administrator (if required), this will be the email and phone number they entered in during the approval process.



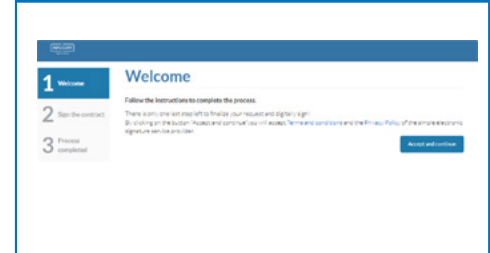
2 TWO FACTOR AUTHENTICATION

Type in one-time password (OTP) that you received via SMS to proceed.



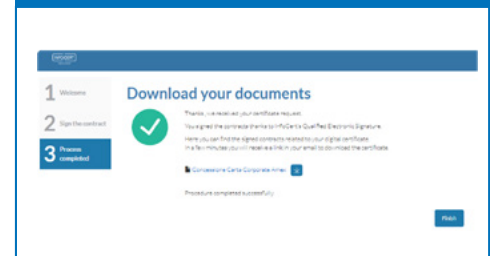
3 FOLLOW INSTRUCTIONS TO SIGN

For the Card Applicant this will be the email and the phone number they provided in the application process. For the Programme Administrator (if required), this will be the email and phone number they entered in during the approval process.



4 COMPLETE SIGNATURE PROCESS

Download signed document and receive email confirmation of signature completion. Only Card Applicant will receive signed copy via email.





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Track a Card Application > Track a Card Application (continued)

Track a Card Application

The Track Applications tab displays all Card Applications so you can view application statuses and approve applications that are pending review.

1 VIEW APPLICATION LIST

In **Track Applications** tab you can view all applications at a glance and their **Current Status**. By selecting the relevant check box(es) you can also **resend the notification email** to the Applicants. If necessary, you can also amend multiple Applicants' email addresses before resending.

Application Activity Back to Overview

To Do List Track Applications

Search by employee name, email, employee ID, application ID, or

For Card Applications in Australia, India, Italy, Japan, Mexico and Singapore only Authorised Signatory / Legal Representative can approve.

For applications past 60 days, use the Date Range filter to view more results.

Application Status: [Dropdown] Country: 1 selected Date Range (Start Date - End Date): 2023-07-15 - 2023-09-13

Download ⓘ

Italy X Clear All

Approve Resend Cancel

	DATE INITIATED	APPLICATION ID	APPLICANT NAME	APPLICANT EMAIL	CURRENT STATUS
<input type="checkbox"/>	>	2023-09-13	IT-1IE589SICWHO	Joe Shmoe	Pending with Signers
<input type="checkbox"/>	>	2023-09-12	IT-T4F6PDKF5YR9	Test Test	Pending PA Review
<input checked="" type="checkbox"/>	>	2023-09-12	IT-1K201LOHDZKI		Sent to Employee
<input type="checkbox"/>	>	2023-09-12	IT-QY10VB3QNGBP		Sent to Employee

2 VIEW STATUS OF APPLICATION

Multiple statuses for applications are available to help you identify where there might be delays occurring and who you could follow up with to move along the process. Not all statuses are currently available for all markets.

Application Status

- Application Expired
- Approved by Amex
- Cancelled by Amex
- Declined by Amex
- PA Declined
- Submitted to Amex
- Pending Amex Approval
- Pending AS Approval
- Pending Pre-Approver
- Pending with Signers
- Pre-Approver Cancelled
- Sent to Employee



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Track a Card Application > Track a Card Application (continued)

Track a Card Application (continued)

If you nominated Pre-Approver(s) in the Access Key, you can track their approval status.

3 VIEW APPLICATION LIST

All Pre-Approvers must complete their approvals before the Applicant will be able to complete the form. You can resend emails to these Pre-Approvers as required.

Application Activity [Back to Overview](#)

[To Do List](#) | [Track Applications](#)

🔍 Search by employee name, email, employee ID, application ID, or

For Card Applications in Australia, India, Italy, Japan, Mexico and Singapore only Authorised Signatory / Legal Representative can approve.

For applications past 60 days, use the Date Range filter to view more results.

Application Status: Country: 1 selected Date Range (Start Date - End Date): 2023-07-15 - 2023-09-13

[Download](#) ⓘ

[Close](#) [Clear All](#)

[Approve](#) [Resend](#) [Cancel](#)

<input type="checkbox"/>	DATE INITIATED	APPLICATION ID	APPLICANT NAME	APPLICANT EMAIL	CURRENT STATUS
<input type="checkbox"/>	> 2023-09-13	IT-1IE589SICWH0	Joe Shmoe		Pending with Signers
<input type="checkbox"/>	> 2023-09-12	IT-T4F0PIXFSYR9	Test Test		Pending PA Review
<input checked="" type="checkbox"/>	> 2023-09-12	IT-1K201LOHDZKI			Sent to Employee
<input type="checkbox"/>	> 2023-09-12	IT-QY10V83QNGBP			Sent to Employee





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Card Applicant Experience [PART1] > Card Applicant Experience [PART2]

Card Applicant Experience

Upon receipt of two emails from American Express, Card Applicants simply log in using the link to the application form and the unique Application ID provided. Applicants may also use the URL and Access Key posted on their company's intranet, if available, and go straight to Step 2.

1 APPLICANT EMAILS

Once the Programme Administrator initiates the application, two emails are generated by American Express to separately send an **Application ID** and an application **link** to the applicant.

2 LOG IN TO APPLY

Applicants that receive the two system generated emails enter their email address and Application ID to access their application. Applicants that are provided with an Access Key enter their email address and the Access Key to access their application.

3 NOMINATING APPROVERS MAY BE REQUIRED

This screen will appear if the Program Administrator has opted for Applicants to enter Card Application approvers. Applicants can enter the name and email address(es) of those individuals.



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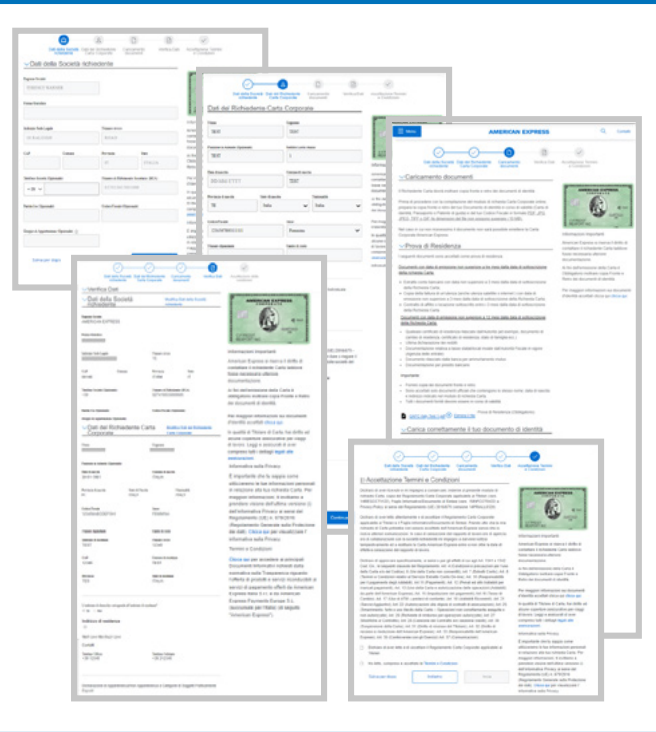
Card Applicant Experience [PART1] > Card Applicant Experience [PART2]

Card Applicant Experience

Applicant completes all required fields, uploads mandatory identification documentation, and accepts terms and conditions before submitting the application.

1 COMPLETE THE APPLICATION

All fields are mandatory unless noted as optional. All mandatory fields need to be completed to submit the application.



2 SIGN THE APPLICATION

After the Programme Administrator approves the application, if required, both the Card applicant and the Programme Administrator will each receive an email with a link to the digital signature form. For individually settled accounts, only the Card applicant will receive the email and must sign.

