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

USER GUIDE FOR PROGRAMME ADMINISTRATORS

MERICAN DON'T do business without it

¹ Use of American Express [®] Work[®] is restricted to employees, contractors and/or agents that the Company, and its representatives and/ or creating designate for the sole purpose of performing online account queries and maintenance, including accessing reports relating to the Company's American Express[®] Corporate Card programs. [®] Work is available to all companies with an American Express Corporate Card program. Enrollment is required. To enroll in [®] Work please contact your American Express Representative or call 1-800-597-5500.





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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?
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- Transitioning your organization to the new digital system
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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





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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.



PA = Program Administrator CA = Card Applicant

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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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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 (1) CREATE ACCESS KEYS Create New Access Key Click on Apply for Card on the **@ Work Homepage** to link Within the Access Key Overview 1 directly to the related screen. section, select Create New Access Key Access Key Overview to initiate the process. Select an Access Key to send applications to employees, bulk apply, or copy an Access Ke Send Applications by Country (2) **INITIATE APPLICATION** Italy In the Send Applications by Country section, select **Italy**. Then either choose . Quick Send 0 **Quick Send**, or to initiate with an Access Key copy the **Application Link** and click Send Applications Send to Applicant. **Card Applications** (3) **APPROVE APPLICATION Italy Application Tracking** a Click on the number above **Ready for** Go to applications ---> 3 Approval under Italy Application Ready for Approval Initiate Applications for employees to complete and submit to American Express **Tracking** to quickly approve, edit, route Ready for Approval the application back to applicant, or Cancel. Apply for Card (4) **TRACK APPLICATION** ----->122 View all applications Click on the number above **Sent to Employee** to view all Card Applications Sent to Employee and the status of each.



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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.

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DASIO CONTROL ACCOUNT			
Select	~		

(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.

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Details		
Access Key Name	Card Type	
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Access Key Name Employee ID	Card Type Select Select Cost Centre	Green Card
Access Key Name Employee ID Yes No	Card Type Select V Cest Centre @ Vis _ No	Green Card
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(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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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 hen click on Send to Applicant button.	f Quick Account employe address.	TER EMPLOYEE DETAILS Send, enter the Basic Control number (BCA) and relevant se contact details including email	Ever-Oute Seed Seed Text Contentions Conte	C for long	Certype Satation y Certype Satation y Certype Not
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Quick Send require post approval by the Programme Administrator.	3 R The syste and autor to the App required to automatic	EVIEW & CONFIRM m will confirm the Application ID natically send an email invitation plicant. The Application ID is o log into the digital form and is cally sent in a second email.	Not Post References References	Tasi Yat Tauran tasukanging nasa an an an @tasinas tas	Para isona



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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.

ele Aponcations in Australia, India, Italy, Ja	ipan. Mexico and Singapore only Authorised Signatory / L	legal Representative can approve.			
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2023-07-20			Corporate Green Card	Standard	1
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(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**.



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.

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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 Program Administrator only signs for central settlement accounts.





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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-51020856AUX2 è necessaria la tua firma.

Prima di procedere alla sottoscrizione del contratto, ricordati di prendere visione delle condizioni contrattuali a te applicate <u>cliccando qui</u>. Ti ricordiamo che è disponibile la Guida sui dintiti del pagamenti effettuati in Europa che puoi verificare in autonomia <u>cliccando qui</u>.

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 insoriti vengano cancellati.

ai al documento e firma

Servizio Nuovi Clienti American Express Italia S.r.I. Sign a Card Application >

Sign a Card Application (continued)

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.

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.

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	Fallow the instructions to complete the process.
2 Sign the contract	There is only one last staglights finalize your request and signally sign. By diving on the busine "Assess and cardinal" you will assess forms and candidons and the Privacy Publicy of the simple discover descense are used as on their.
3 Consistent	Accept and continue

2 TWO FACTOR AUTHENTICATION

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

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One Time Personnel (OTP)	
mind	
Did you not receive the OTP? Resent OTP	

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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.

(2) VIEW STATUS OF APPLICATIONT

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 Activity				Back to Overview			Application Status
R	o Do List		Track Applica	ations			Application Status
Q. Search by employee name, For Card Applications in Australia, It Legal Representative can approve. For application spart 60 days, use th Application Status	email, employee ID, application ndia, Italy, Japan, Mexico and Sing he Date Range filter to view more Country 1 selected	apore only Authorised Signatory results.	// Date Range (Start Date - En 2023-07-15 - 2023-09-	id Date) 13			 Application Expired Approved by Amex Cancelled by Amex Declined by Amex PA Declined Submitted to Amex Pending Amex Approval
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> 2023-09-12	IT-QY10V83QNGBP			Sent to Employee			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.

	To Do List		Track App	lications	
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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.

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Let's get to work together	Let's get to work together
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DOWN do business without it	2004T do business without IT-

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.

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(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.



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.

