

American Express @ Work^{®1}

Global Apply for Card

USER GUIDE FOR PROGRAM ADMINISTRATORS



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Before you begin

Click one of the options
below to go to the relevant
information.

ALREADY ENROLLED TO A DIGITAL CARD APPLICATION SOLUTION?



YES

**I AM
ENROLLED**





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Checklist

- > Migrating from Apply for Card to the global solution
- > Navigating critical functions



NO

**I AM NOT
ENROLLED**





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Checklist

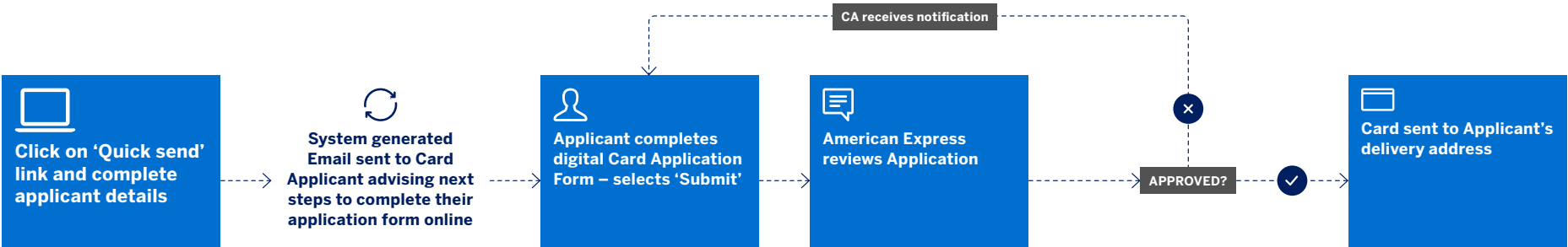
- > What is an Access Key?
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Global Apply for Card Journeys

The Quick Send link can be found on the “To Do” section. By selecting this you have effectively ‘approved’ the application and it will automatically be routed to American Express once the Applicant has completed the form.

QUICK SEND

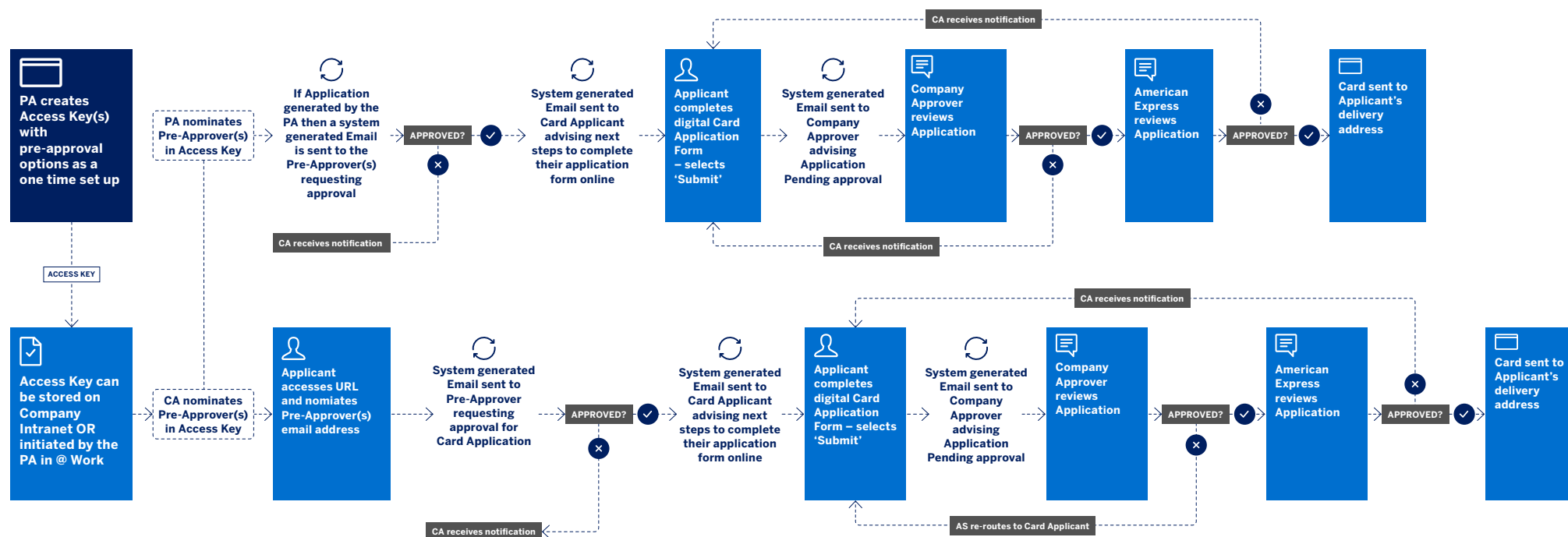


PA = Program Administrator
CA = Card Applicant

Global Apply for Card Journeys

Access Keys can be set up with either the ability to pre-approve applications before the Employee completes them and/or to occur after the application has been completed. Card Applicants can also nominate who needs to approve their application before they complete the form.

PRE-APPROVAL ACCESS KEY



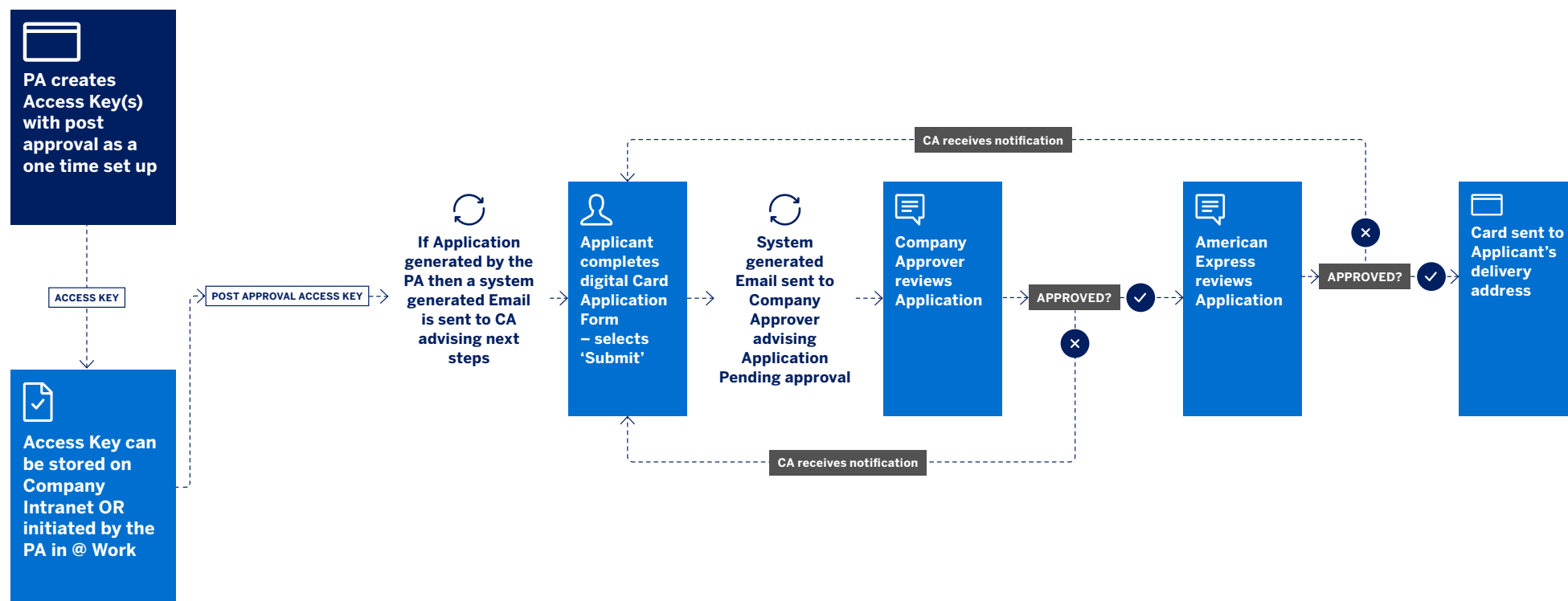
PA = Program Administrator
CA = Card Applicant



Global Apply for Card Journeys

An Access Key can be created which 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.

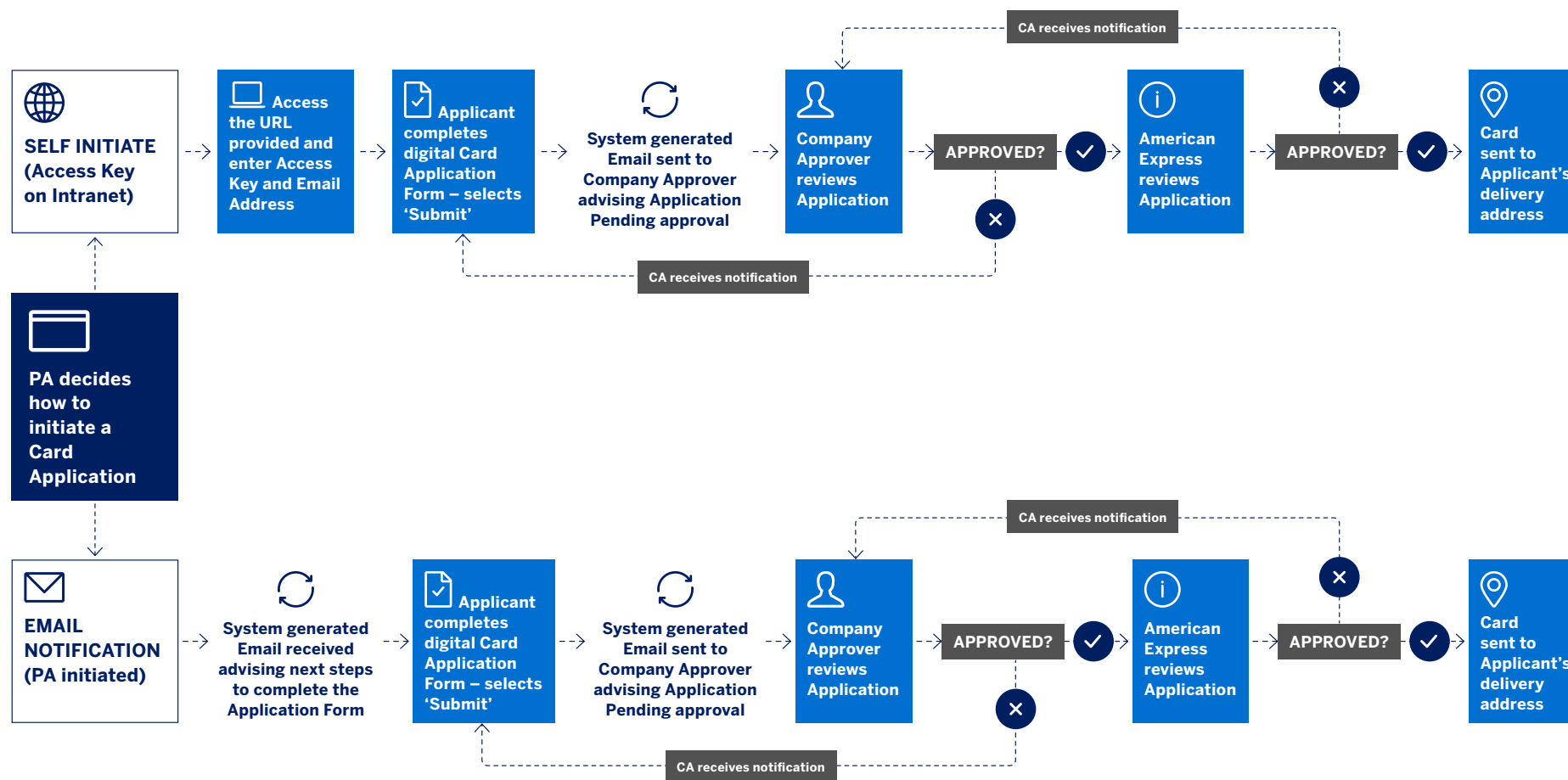
POST-APPROVAL ACCESS KEY



PA = Program Administrator
CA = Card Applicant

Which experience suits your business needs?

Program Administrators can choose to initiate Card Applications each time, or they may publish the Access Key and Card Application URL on their Company Intranet so they need only approve applications as required. **Card Applicants** can self-initiate Card applications by using the URL and Access Key provided by the Program Administrator.



Navigating critical functions

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

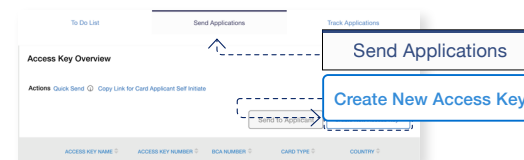
EASILY ACCESSIBLE

Click on the action on the **@ Work Homepage** to link directly to the related screen.

These additional links will only appear if you are enrolled to the existing digital solution.

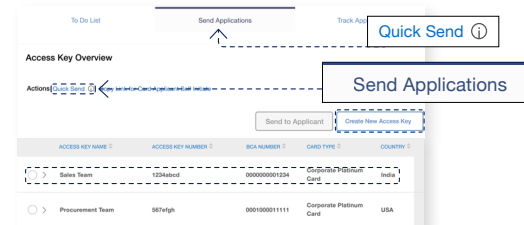
1 CREATE ACCESS KEYS

Within the **Send Applications** tab, select **Create New** to start creating the process for all your Applications*. Please note, once you create an application, you will only be able to view and manage it with this tool.



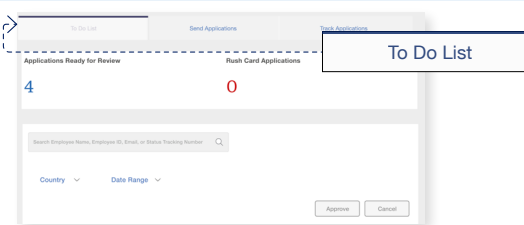
2 INITIATE APPLICATION

In the **Send Applications** tab, you may choose the link to **Quick Send** or select a specific **Access Key** then **Send to Applicant**.



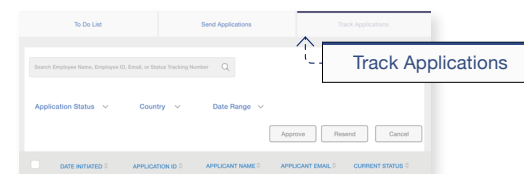
3 APPROVE APPLICATION

To Do List tab lists all your Applications including Priority ones for you to quickly **approve, edit, re-route back to Applicant** or **cancel**.



4 TRACK APPLICATION

Selecting the **Track Applications** tab enables you to view all Card Applications and their status in the process.



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 Key.

1 SELECT BASIC CONTROL ACCOUNT

Within the Create **New Access Key** screen, start typing for suggested results or select from the drop down the BCA you wish to use.

Enter 'Create Access Key' Details

BASIC CONTROL ACCOUNT

Select ▼

Cancel Continue

2 CUSTOMIZE ACCESS KEY

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

Enter 'Create Access Key' Details

BCA Number 00000012345	MCA Name ONLINE APPLICATION DEMO	Country US
Basic Control Account TEST COMPANY	Liability Type LIMIT LIABILITY JS	Billing Option INDIVIDUAL
Card Delivered To COMPANY		

DETAILS

ACCESS KEY NAME US Sales Team	CARD TYPE Corporate Green Card ▼
----------------------------------	-------------------------------------

3 + 4 REVIEW & CONFIRM

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

ACCESS KEY NAME
US Sales Team

CARD TYPE
Corporate Green Card ▼

EMPLOYEE ID
☒ Yes ☐ No

COST CENTRE
☒ Yes ☐ No

LENGTH
9 ▼

LENGTH
5 ▼

Customise Approvals

How should approvals work for this Access Key?

☐ I'll assign approvers for the Card Application.

☐ The Card Applicant will assign managers or leaders who need to approve the Card Application.

Initiating a Card Application

Select either Quick Send or click on the Access Key you wish to initiate the Application form.

FLEXIBLE INITIATION PROCESS

Select a quick **initiation of Application** or select an Access Key then click on **Send to Applicant** button.

Access Key Overview

Actions: [Quick Send](#) [Copy Link for Card Applicant Self Initiate](#)

Initiate via an Access Key

[Send to Applicant](#) [Create New Access Key](#)

ACCESS KEY NAME	ACCESS KEY NUMBER	BCA NUMBER	CARD TYPE	COUNTRY
Sales Team	1234abcd	0000000001234	Corporate Platinum Card	USA

Quick Send will mark the Application as already approved by the Initiator and includes default preferences. In Australia, India, Mexico, Singapore and Japan the Initiator must be the Authorised Signer. Post Approver is required in the IEC and Japan markets.

close

1 ENTER EMPLOYEE DETAILS

Enter the **BCA number (if Quick Send)** and/or relevant **Employee contact details** including email address.

Enter 'Send to Applicant' Details

APPLICANT EDITABLE FIELDS

☒ Employee ID ☒ Cost Centre

DETAILS

FIRST NAME: CHARLES LAST NAME: FROST EMAIL: CF@COMPANY.COM

EMPLOYEE ID: 123456 COST CENTRE: 123456789

APPROVAL WORKFLOW

The approval option you chose in the Access Key has been selected. You may modify your selection for this application.

2 REVIEW & SUBMIT

Ensure all details are correct before clicking **Submit**.

Review 'Send to Applicant' Details

ACCESS KEY DETAILS

Access Key Name: TEST COMPANY Basic Control Account: TEST ACCOUNT Card Type: CORPORATE GREEN CARD

CHARLES FROST Edit

APPLICANT EDITABLE FIELDS

☒ Employee ID ☒ Cost Centre

DETAILS

First Name: CHARLES Last Name: FROST Email: CF@COMPANY.COM

Employee ID: 123456 Cost Centre: 123456789

APPROVAL WORKFLOW

3 REVIEW & CONFIRM

The system will confirm the Application ID and automatically send an email to the Applicant so they can complete the form.

Thank You!

Please review the details below regarding your request

NAME	EMAIL ADDRESS	APPLICATION ID	STATUS
CHARLES FROST	CF@COMPANY.COM	US-00000001	Success

[Work Home](#) [Close](#)



Approve a Card Application

Once reviewing a summary of the Application, you can choose to approve, edit, or 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.

At the top the number of **Applications Ready for Review** and **Rush Card** (urgent) **Applications** will appear.

To Do List Send Applications Track Applications

Applications Ready for Review: 4 Rush Card Applications: 0

Search Employee Name, Employee ID, Email, or Status Tracking Number

Country Date Range

Approve Cancel

DATE INITIATED	APPLICANT NAME	APPLICANT EMAIL	CARD TYPE	APPROVAL TYPE
2020-08-11	Rahul Singh	rs@company.com	Corporate Green Card	Standard

APPLICATION ID	RESIDENTIAL ADDRESS	ACCESS KEY NAME	EMPLOYEE ID
US-00000100	address line 1	SALES TEAM	12345678
NAME ON CARD	INDIA	BCA NUMBER	COST CENTRE
FM last		0000000012345	1234568
MOBILE PHONE	BILLING ADDRESS	BCA NAME	DATE OF BIRTH
0123456789	address line 1	TEST COMPANY	1999-10-10

- 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**.

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: CHARLES FROST EMAIL: CF@COMPANY.COM APPLICATION ID: US-00000001

On behalf of the Company, I confirm that the information given in this application is to the best of the Company's knowledge true and correct, and hereby approve the applicant's application.

Go Back Confirm

Track a Card Application

The list displays all Card Applications so you can view where the Application is in the process, and even conveniently approve applications that are pending for 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.

Back to @ Work Home

To Do List Send Applications Track Applications

Search Employee Name, Employee ID, Email, or Status Tracking Number

Application Status Country Date Range

2020-05-15 → 2020-08-13 X

Approve Resend Cancel

	DATE INITIATED	APPLICATION ID	APPLICANT NAME	APPLICANT EMAIL	CURRENT STATUS
☐	> 2020-08-13	US-000000001	CHARLES FROST	cf@company.com	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.

Application Status ^

- ☐ Application Expired
- ☐ Approved by Amex
- ☐ Cancelled by Amex
- ☐ Declined by Amex
- ☐ PA Declined
- ☐ Pending Amex Approval
- ☐ Pending PA Review
- ☐ Pending Pre-Approver
- ☐ Pre-Approver Cancelled
- ☐ Sent to Employee



Track a Card Application (cont.)

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.

Back to @ Work Home

To Do List

Send Applications

Track Applications

Search Employee Name, Employee ID, Email, or Status Tracking Number

Application StatusCountryDate Range

2020-05-15 → 2020-08-13

ApproveResendCancel

	DATE INITIATED	APPLICATION ID	APPLICANT NAME	APPLICANT EMAIL	CURRENT STATUS
☐	2020-08-12	US-000000001	CHARLES FROST	cf@company.com	Sent to Employee

BCA NUMBER00000001234

CARD TYPECorporate Green Card

EMPLOYEE ID123456



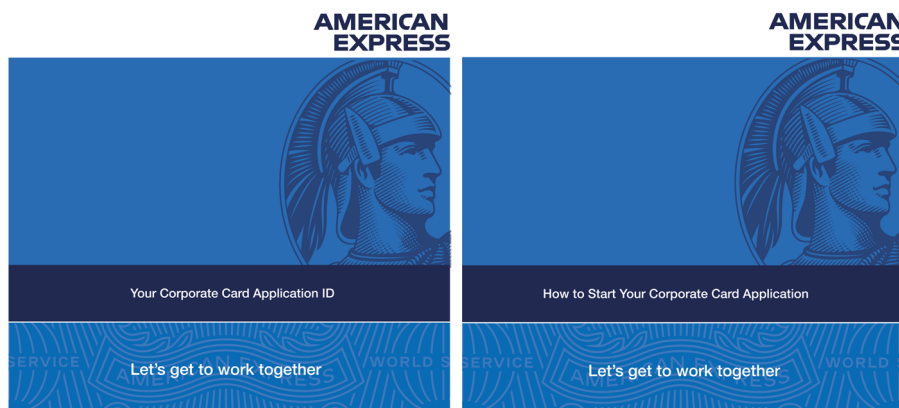
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Card Applicant Experience

Upon receipt of emails from American Express, Applicants simply log in using the link and Application ID provided. Applicants may also use the URL and Access Key posted on their Company's intranet and go straight to Step 2 as emails won't be triggered from @ Work by the Program Administrator.

1 APPLICANT EMAILS

Once the application has been initiated, two emails are generated by American Express to the Applicant containing an Application ID and link to URL.



2 LOG IN TO APPLY

Applicants enter their email address, Application ID or Access Key to access the application

3 NOMINATING APPROVERS MAY BE REQUIRED

If the Program Administrator has opted for Applicants to enter Card application approvers this screen will appear. Applicants can enter the name and email address(es) of individuals who must approve before the form can be completed.



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Card Applicant Experience

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

1 COMPLETE THE APPLICATION

Complete the fields required - ALL ARE MANDATORY.

The screenshot shows a multi-step application form. The first step, 'Company Information', includes fields for company name, address, and contact details. The second step, 'Applicant Information', includes fields for the applicant's name, address, date of birth, and identification documents. A 'Save For Later' button is visible at the bottom of the form.

2 TRACKING ID

Retain this unique reference number for your records.

The screenshot shows a confirmation page with a green checkmark icon and the text 'Confirmation'. Below this, it says 'Thank you! Your digital application has been submitted. Your Application ID is: US-0000000692'. A 'Close' button is located at the bottom. To the right, there is a small image of an American Express card and a section titled 'Important Information' with links to 'Privacy Statement' and 'Terms & Conditions'.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



OVERVIEW

1. How do applicants access their Card Application?

There are two ways to access a Card application:

A. Access Key and a URL Link

- i You may provide applicants with a link to the application site and an Access Key.
- ii Access Keys may be posted on the Company's internal intranet site.

B. Email Invitation

- i Applicants will receive two emails from American Express, initiated by their Program Administrator via @ Work, inviting them to apply for a Corporate Card.
- ii One email will contain a link to the application site, the other an Application ID to use as a key to log on and complete the application.

Once on the Card application site, Card Applicants will be instructed to enter their corporate email and Application ID or Access Key and begin their journey to complete their Corporate Card application.

2. What Card products are available in Global Apply for Card for Customers to use?

Travel and Entertainment Cards:

- The American Express Corporate Platinum Card®
- American Express® Corporate Gold Card
- American Express® Corporate Green Card

3. Is GAFC mobile or tablet friendly?

GAFC will respond to and function on smaller screen resolutions like tablet and mobile, however, we don't have a separate mobile only application.

4. When the Embossed Company name is on the Card, where does it draw from?

The system pulls the embossed company name on the Card from your American Express Control Account details.

5. Who do I contact if I need assistance?

In the event you require technical assistance or have additional questions, please contact your Account Manager or the PA Help Desk at 1 888 800 8564.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



HOW CARD APPLICANTS RECEIVE APPLICATIONS TO APPLY

1. Can a Card Applicant initiate their own Card Applications?

Yes, the Card Applicant needs only the Access Key and URL to initiate the process.

You can store the Access Key (unique) and Application URL (common) via your internal Intranet or internal process. If the Access Key requires a pre-approval, the Card applicant will enter their contact information to kick-off the pre-approval process. The PA will always need to review applications completed in this fashion to ensure proper controls for your Card Program are in place.

2. How many applications can PAs send at a time?

PAs can send up to 10 applications at a time by simply entering the applicant's first name, last name, and email address. This will create a unique Application ID for each applicant that is automatically delivered to them via emails from American Express.

3. Once sent to the employee, how long do they have to complete an application?

Applicants will have 45 days to complete their application prior to it being cancelled by the system.

4. Are there any notifications sent to applicants to remind them to complete online?

The Card applicant will receive an email reminder to complete any non-started or pending application 3 days after application initiation, then every 10 days until the application is cancelled at 45 days.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



ACCESS KEYS

1. What is an Access Key?

An Access Key is a unique code, created in @ Work, and each one is associated with a Basic Control Account (BCA) for your company. The Access Key carries information about the BCA set up such as Product, Billing, and Liability Type, to the Card application. PAs can mandate Cost Center, Employee ID and even the length of the fields required.

2. How do I create an Access Key?

PAs create an Access Key in the 'Send Applications' tab with a few simple steps:

- Click 'Create New Access Key' on 'Send Applications' Tab
- Choose the BCA for the Access Key
- Set the options you would like associated with the Access Key (see below)
- Confirm and Create!

3. Are there any fields I can mandate in the application?

Yes, if you want to require that applicants enter their Cost Center, Employee ID on Applications, including the length of the fields required, check the boxes for these items during the Access Key set-up process.

4. Does each PA need to set up their own Access Keys?

Not at all! All PAs with permissions for a BCA will have full visibility to manage and use Access Key's created for those BCA's. You may only need one Access Key for each BCA. If a BCA has two or more types of Cards associated with it, you will need one Access Key for each Card type.

If preferred, you can create multiple Access Keys for a BCA if there are different Department and/or Approver combinations required. These Access Keys can be leveraged by all PAs responsible for those departments and approvers.

5. How many Access Keys can a PA create?

There is no limit to how many Access Keys can be created for each BCA or by each PA. Developing consistent naming conventions and internal workflows will help your organization optimise the number of Access Keys created.

6. Are Access Keys required to initiate applications?

No, not always. To initiate an application without an Access Key, the PA can select the 'Quick Send' option to send application(s).



Frequently Asked Questions

American Express @ Work® Global Apply for Card



ACCESS KEYS

7. When does an Access Key expire?

Access Keys don't expire. However, if the PA who set up the company moves to a new role, or leaves the company, we recommend an active PA edit the Access Key to ensure all notifications stay within the group. We always recommend at least 2 PAs register for GAFC to ensure all roles can be completed any time.

8. Is there a limit to the number of applications for each Access Key?

There is no limit to the number of applications issued for any Access Key.

9. If we add new PAs, will they be able to see existing Access Keys by default?

Yes, provided the new PAs are set up with permissions at the same BCA level, new PAs can access, use and maintain the Access Keys.

10. Do Access Keys expire in GAFC?

No, there is no expiration date for GAFC Access Keys.



HOW DO THE APPROVAL ROUTINGS IN THE ACCESS KEYS WORK?

1. For Applications including Pre-Approvers, will the Approver receive an email alert in real time?

Yes, the Approver will receive an email within 15 minutes, and they can decision whether an employee is eligible to apply directly from the email, without needing a @ Work ID.

2. What Approval options are available?

When setting up the Access Key the User can choose either:

- **Pre- and Post-Approval**, where a Pre-Approver (e.g Line Manager) approves the application prior to being sent to the Employee and a Post-Approver reviews and approves the completed application.
- **Pre-Approval**, where only a Pre-Approver approves the application. Once the applicant completes the application, it will be routed to American Express for processing.
- **Post-Approval**, where there is no Pre-Approver, and the PA reviews and approves the completed application prior to submission.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



HOW DO THE APPROVAL ROUTINGS IN THE ACCESS KEYS WORK?

3. Do Post-Approval applications go to the PAs automatically?

Once completed, applications requiring Post-Approval appear in the To Do List tab for all PAs with GAFC permissions under that BCA.

In addition, the PA who last edited the Access Key will receive an email notification that they have an application to review.

4. What is Quick Send and when should I use it to initiate applications?

Quick Send allows the PA to quickly initiate an application to an employee in the fewest possible steps.

- Simply select a BCA and enter the employee's first name, last name, and email, then review and submit.
- No Access Key is required.
- Quick Send applications do not require Post-Approval. The application will be routed directly to American Express after the Card Member submits the application.

Use Quick Send when you want to quickly provide a Card to an employee without the need for an Access Key.

5. How many Card Applications can a PA initiate at one time?

PAs can initiate up to 10 application requests at one time through Quick Send or PA Initiate with an Access Key.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



APPLICATION TRACKING

1. How can a PA see where a Card Application is in the process?

The PA can view applications in the 'Track Applications' tab for any particular individual in the system.

2. What are the different 'statuses' for applications in Apply For Card?

Apply for Card Status include:

- Application Expired
- Approved by Amex
- Canceled by Amex
- Declined by Amex
- PA Declined
- Pending Amex Approval
- Pending PA Review
- Pending Pre-Approver
- Pre-Approver Canceled
- Sent to Employee

3. Can the PA review the Pre-Approval status? If so where can the PA view this before Post Approval?

Yes, all Application 'statuses' are tracked in the 'Track Applications' tab – even those that have been self-initiated by the Card Applicant. If there is a Pre-Approver, once they approve the application, the status will move to 'Sent to Employee'.

4. If an PA cancels or rejects an application, will an email generate to the applicant? Is this real time?

Yes, the applicant will receive an email notification advising that the company has declined/canceled their application within 15 minutes.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



APPLICATION REVIEW AND APPROVAL

1. How will a PA know when they have applications to review?

The PA who setup or last edited the Access Key will receive an email notification that there is a completed application to review.

When any PA logs onto Apply for Card, they will see applications to review and approve in the To Do List.

2. What kind of actions can a PA/AS make on a Card Application being reviewed?

PA/AS can make the following actions on Card applications pending approval:

- **Change delivery address** from Residential to Business (unless company is set up on central card delivery).
- **Edit** some of the non-PII information on the application such as Employee ID or Cost Center.
- **Route the application back to the applicant** to correct fields with errors and include a note with details on what the applicant needs to correct.
- **Approve or Cancel applications** one at a time or all at the same time.

3. What happens when a PA re-routes the application back to the applicant for edits?

When the PA routes the application back by selecting the link that says, 'Route back to Applicant', the PA can enter comments as to why they are routing it back, and the applicant will receive the details in an email.

The applicant then logs in again using the details in their email, fix the errors, and re-submit to the PA for review. During this 'reroute' the status in 'Track Applications' will return to 'Sent to Employee' as the Card application is pending with the employee.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



CARD APPLICATION/CARD DELIVERY

1. Are there mandatory fields on the application and will the Applicant know there is an error with their application?

Yes, Applicants will be notified which fields are mandatory while they are completing the online Application. If there are any errors, messages will appear prompting the individual to provide more information or correct their entries.

2. Can different Card delivery address locations be managed by creating another Access Key for the same BCA?

There is not an option within Access Key Details to select Card delivery options.

If Central Card Delivery is ON, their Card will be delivered to the Business Address.

If Central Card Delivery is OFF, the applicant is advised that their Card will be delivered to the address they selected as their Statement/Billing address.

3. What are the Card delivery address options for applicants?

Unless your company has arranged to distribute Cards centrally, the applicant can select either their Home or Company address for Card delivery.

4. How do Applicants submit completed applications?

Once Applicants have completed all mandatory fields in the application, they will reach a review and submit screen. There they can review and modify fields if necessary.

Once finalized Applicants accept the Terms and Conditions and click the Submit button. A screen will then appear confirming that the application has been submitted.

