e-Application Belgium and Luxembourg User Guide for Program Administrators

AMERICAN EXPRESS® CORPORATE CARD | SEPTEMBER 2022

AMERICAN EXPRESS

DON'T *do business* WITHOUT IT™

Introduction

The e-Application for American Express Corporate Cards makes the application process easy, fast and very secure for both the Applicants and Program Administrators. It is easy to complete, approve and submit, which speeds up the process of receiving a Corporate Card.

- Optimal accuracy and good support for Card Applicants.

- Faster processing and more transparency for Program Administrator

- Options like invoicing type, PA name, … are setup in advance

- 100% digital

AXP Internal

More advantages for all users

Transparency
The Program Administrator can get a fast overview of all open applications and receives reports to all actions regarding the applications.

Optimal accuracy
Applications can only be sent if all mandatory fields are completed.

Secure transmitting
Applications are transmitted securely to American Express. Personal & Company information are not transferred via unsecure email or post.

Fast handling
Directly submit and approve an application online.

Flexibility
Employees can apply fully digital for a Corporate Card every time – and everywhere they have a network connection.
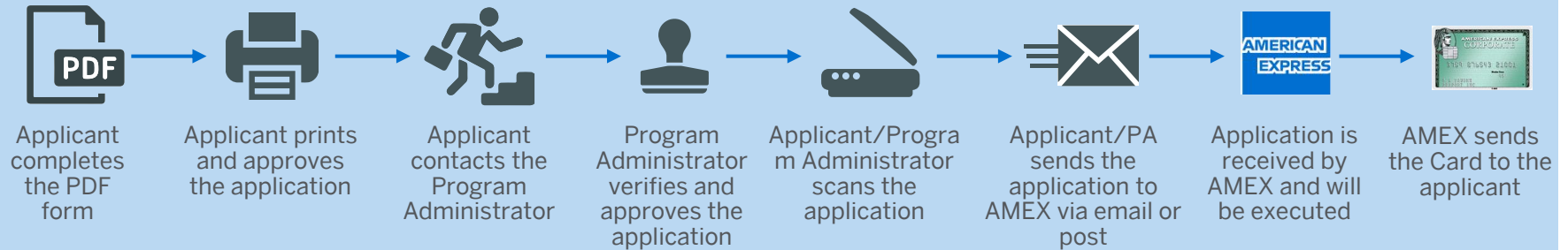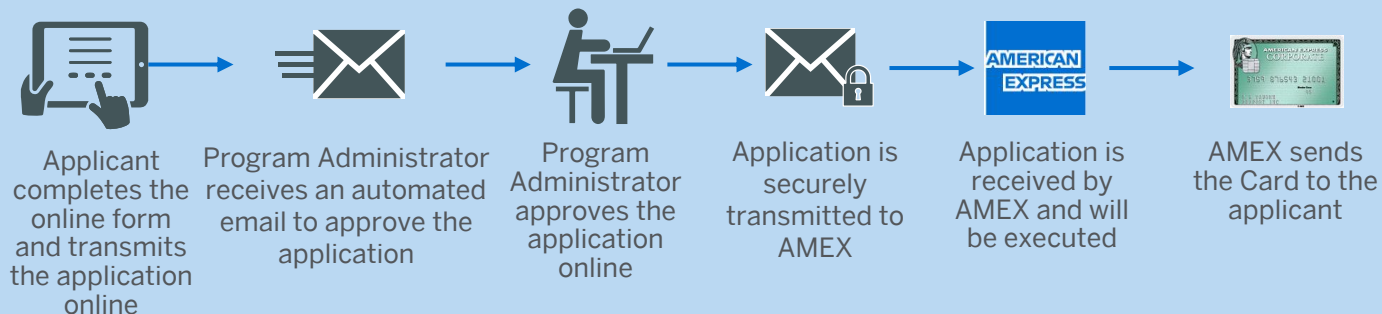
AXP Internal

Efficient and fast application

Comparison: PDF Application Form vs. e-Application

PDF Application Form (Paper)

| Applicant completes the PDF form | Applicant prints and approves the application | Applicant contacts the Program Administrator | Program Administrator verifies and approves the application | Applicant/Program Administrator scans the application | Applicant/PA sends the application to AMEX via email or post | Application is received by AMEX and will be executed | AMEX sends the Card to the applicant |

vs.

| Applicant completes the online form and transmits the application online | Program Administrator receives an automated email to approve the application | Program Administrator approves the application online | Application is securely transmitted to AMEX | Application is received by AMEX and will be executed | AMEX sends the Card to the applicant |

e-Application

Program administrator

First steps to setup

What do I need to do to start working with the e-Application?

A The Program Administrator visits the <u>Corporate Card e-Application Set up Page</u> and receives an email with a URL leading to the e-Application and a URL leading to the PA tool.

B After clicking on the URL leading to the PA tool, the PA needs to log-in in his/her PA area

C The Program Administrator can see an overview and can approve, decline or send back the received applications.
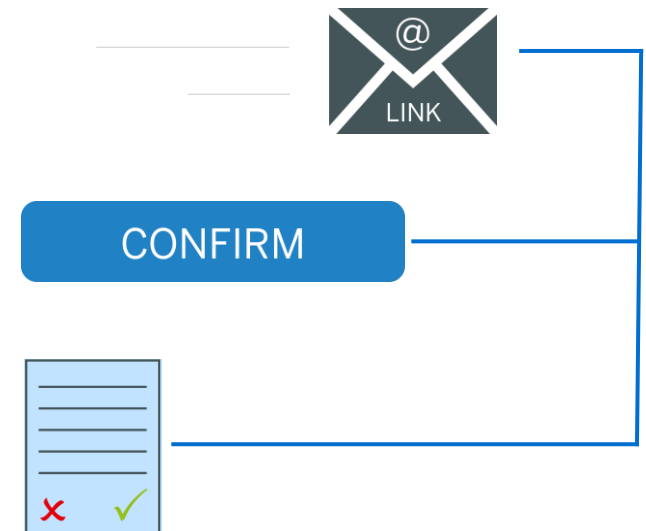
Note: The PA must be registered as approver at American Express. There can be more than one person allowed to process the applications (approve/decline/address queries). The PA needs to act within 30 days. After the expiry, the application will be deleted.

AXP Internal

Step A

Corporate Card e-Application Set up page

- The Program Administrator visits the page and **introduces his BCA number and email** address.

- The Program Administrator receives an **email with a URL** leading to the e-application and a URL leading to the PA tool.

- The **link to the e-Application** can be shared with the employees who will apply for an American Express Card.

- The **PA tool URL** links to the area where the PA can approve, decline or send back the applications.

www.americanexpress.be/pa-corp-card-setup
www.americanexpress.lu/pa-corp-card-setup

Step B

Access the PA tool: Request password – one-time

After the Program Administrator is directed to the URL, he/she will be asked to enter their email address and click on "request new password". A temporary password is sent to their email address. After entering the temporary password, the PA is prompted to create a new and own password.

Step C

Overview of the open applications

Information for approving, declining or returning the application.

	Basic Control Account (BCA)	Reference number (PCN) ⓘ	Urgent ▾	Date submitted	Company Name	Official first and middle names ⓘ	Last Name	Card Type	Liability	Print	Details
☐	12457878746	202111230012BE		23.11.2021	American Express	Official	Last	green-cc	Full Corporate liability	🖨	↪

Pending Corporate Card Applications   Program Administrator ⓘ   Basic Control Account ⓘ   Invite Employee   History ⓘ   Logout

Please review the pending Corporate Card Application(s) that have been submitted to be signed off by you.

You have been listed as the Programme Administrator by the below Card Applicant(s). If this is incorrect please click on Send back.

You can **Approve** or **Decline** multiple Card applications in one go.

Please click on **Details** if you wish to review an application in detail.

Please note that all approved applications require an American Express Basic Control Account (BCA) of 11 digits. If you do not know your BCA number, please call our Corporate Customer Service on +32 2 676 29 29.

Company Affirmation

Approving Company Signatory E-Mail

By clicking on "Approve" I declare on behalf of the company that the information is correct and complete. We therefore ask American Express to issue the American Express Corporate Card to the above-mentioned employee(s).

Decline   **Approve**

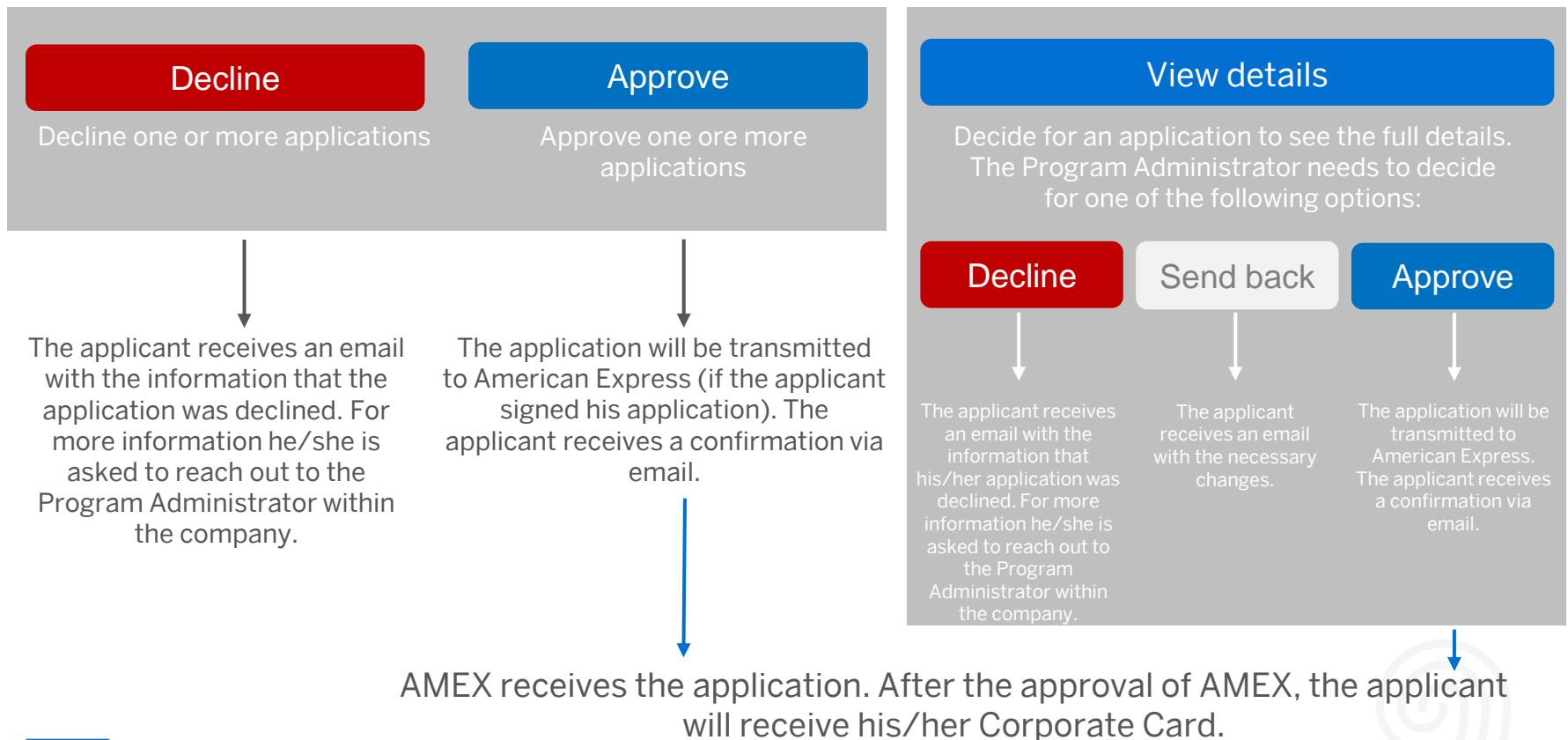Selection of the application(s).

Company Account (BCA) number

Detailed view of the application and send back option.

Functionalities PA Tool at a glance

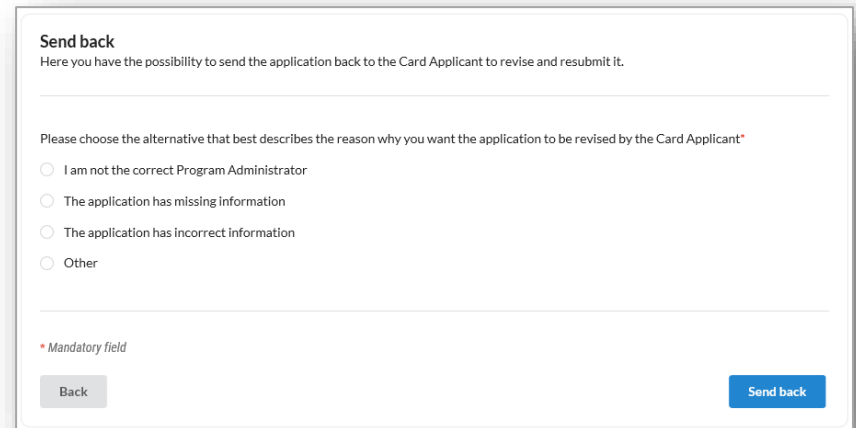On the Overview page the Program Administrator can choose one of the following options:

Decline	Approve
Decline one or more applications	Approve one ore more applications

The applicant receives an email with the information that the application was declined. For more information he/she is asked to reach out to the Program Administrator within the company.

The application will be transmitted to American Express (if the applicant signed his application). The applicant receives a confirmation via email.

View details

Decide for an application to see the full details. The Program Administrator needs to decide for one of the following options:

Decline	Send back	Approve
The applicant receives an email with the information that his/her application was declined. For more information he/she is asked to reach out to the Program Administrator within the company.	The applicant receives an email with the necessary changes.	The application will be transmitted to American Express. The applicant receives a confirmation via email.

AMEX receives the application. After the approval of AMEX, the applicant will receive his/her Corporate Card.

Send back functionality

Send back an application

By clicking on **Send back** a new window appears. The Program Administrator is asked to indicate the reason(s) for that action.

The reason(s) for sending back the application will be transferred to the applicant via email. He/she will be advised to change the application and submit it for approval again.

Send back
Here you have the possibility to send the application back to the Card Applicant to revise and resubmit it.

Please choose the alternative that best describes the reason why you want the application to be revised by the Card Applicant*

○ I am not the correct Program Administrator

○ The application has missing information

○ The application has incorrect information

○ Other

* Mandatory field

Back   Send back

Customise your applications in the PA Tool

Basic Control Account (1)

Information on customizing a BCA and also make a choice to display certain fields or not, such as the employee ID field

Link to the eApplication

Delete a Company Account if you no longer manage this BCA

Customise your applications in the PA Tool

Basic Control Account – edit (2)

Product, Liability and Invoicing is pre-set

Set Cost Centre, Employee number, Country and Delivery options – with the toggle you can switch the fields ON or OFF so the applicant either sees it or not. Company Name and Membership Rewards are pre-set

Customise your applications in the PA Tool

Invite employees (1)

Information to send personalized applications

American Express Corporate Card Online Application

| Pending Card Applications | Program Administrator ❶ | Company Account ❶ | **Invite Employee** | Submitted ❶ | | Logout |

Here you can add employees and send them a personal invitation link. Each sent link can be opened several times, but can only be used once to submit an application.

Please click on **Add employee** to add an employee. If you want to change the data for an already added employee, click on **Edit**.

Please click on **Send selected invitations** to send an invitation email to the desired employee(s).

Employees who have been added are deleted from your overview if:

• they have successfully completed an application; or
• they have not taken any action in the last 30 days; or
• they are deleted manually by you.

If the employee successfully completes an application, it will appear in the tab **Pending Corporate Card applications**.

Pending invitations

	Company Account (BCA)	Salutation	First Name	Last Name	Email Address	Invitation sent	Edit	Send link	Delete
☐									

Sent invitations

	Company Account (BCA)	Salutation	First Name	Last Name	Email Address	Invitation sent	Edit	Send link	Delete
☐									

| ⬇ Bulk Download | ⬆ Import invitations | | | | Delete selected invitations | Send selected invitations | **Add employee** |

Privacy Statement   Terms & Conditions

Overview on pending and sent invitations

AXP Internal

Customise your applications in the PA Tool

Invite employees (2)

Select the relevant BCA

Pre-fill fields for the applicant here

Customise your applications in the PA Tool

History – Submitted applications

List of submitted applications – if there are multiple PAs responsible for the BCA, all applications will show here for 30 days

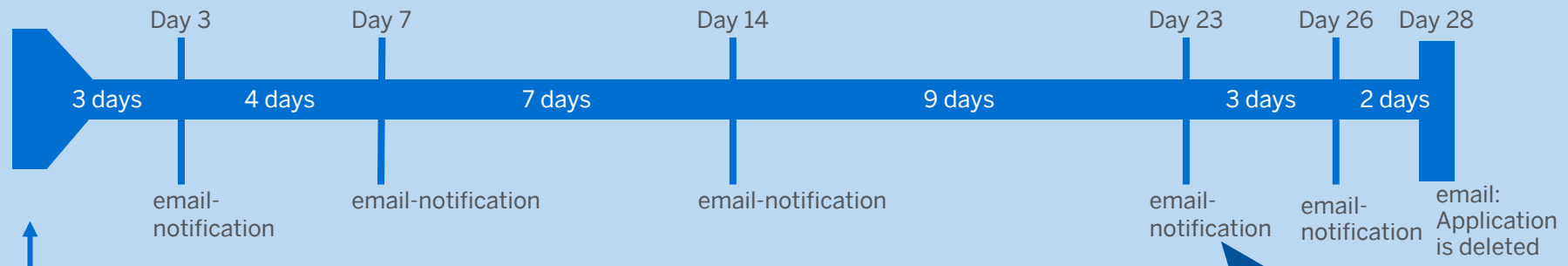Decision taken approved/rejected/sent back

AXP Internal

16

If The PA is absent / not available

Below the email notifications, that will be received by the applicant if the Program Administrator has not acted on the application:

STANDARD DELIVERY OF THE CARD

Day 3	Day 7	Day 14	Day 23	Day 26	Day 28
3 days	4 days	7 days	9 days	3 days	2 days

email-notification (Day 3) · email-notification (Day 7) · email-notification (Day 14) · email-notification (Day 23) · email-notification (Day 26) · email: Application is deleted (Day 28)

email: Application was transmitted

URGENT DELIVERY

Day 2	Day 4	Day 7	Day 14	Day 19
2 Days	2 Days	3 Days	7 Days	5 Days

email-notification (Day 2) · email-notification (Day 4) · email-notification (Day 7) · email-notification (Day 14) · email: Application is deleted (Day 19)
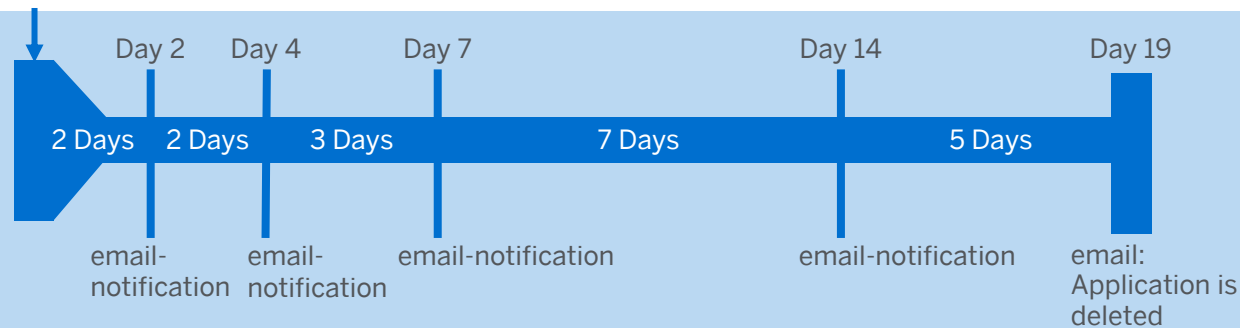
Email Notifications inform that the application is not finalized yet. The Card applicant has the possibility to choose another PA (if available!).

NOTE FOR PA: it is important to appoint an approver in case of long leave (30 days and more)

Corporate Card Applicants

Access for Applicants

Applicants can access the customized e-Application through a link generated via the PA tool (BCA Control Account Tab see pg 12).

English, French or Dutch? Please choose your preferred language.

American Express Corporate Card
Personal details

Personal details	Company details	Summary	Submit and Sign

Please register:

Digitally
- With an eID cardreader
- With itsme

Manually
- With your ID Card at hand

On the summary page, we ask you to review the information you provided us with and to accept the Terms and Conditions.

The application form can be signed electronically. At the same time the form is sent to the selected Program Administrator for approval.

Card Type*	Billing and Settlement terms ❶*	Liability Type*
Corporate Card	Centrally billed, Centrally settled	Full Corporate liability

The applicant completes the form:
I. Personal details
II. Company details
III. Summary
IV. Submit and sign
In the end he/she sends the application to the Program Administrator

The Program Administrator approves the application and releases the transmission to American Express.

To be completed by the applicant

Personal Information

Depending on the way the applicant identifies himself he needs to complete some personal information, like:

- ID expiry date, ID number.

- Date of birth, Country of birth, Place of birth, Nationality.

- Title, Official First Name(s), Last Name, private address.

- Telephone Number (private and work), email address (work), IBAN (only for Individually billed, individually settled companies) including tick box for Direct Debit.

- Address for the delivery of the card (if not set by the company beforehand)

- Mothers first name, correspondence language

To be completed by the applicant

Types of identification

The applicant is obliged to attach a copy of a valid ID to the application if he doesn't identify himself with .beID or itsme:

To be completed by the applicant

Company information – (possible) mandatory fields

Company Name, PA name and e-mail are pre-populated. Cost Center and Employee number, these fields are optional and can activated in the PA tool (BCA Control Account tab) prior to applicant receiving the personalized link

To be completed by the applicant

Summary

- **Review** the completed information

- Option **Urgent Delivery** of the Card

- Option **Membership Rewards** program enrolment (only when allowed by Company)

- Confirmation: Accept the **Terms and Conditions** and confirm the **correctness** of the information (mandatory field)

- By clicking on **Submit & Sign** the application will be forwarded automatically to the Program Administrator

To be completed by the applicant

Signature

The signature of the document happens fully digital.

- **Sign** the application form with .beID, itsme, SMS or email OTP (One Time Password)

- **Confirmation**: the applicant received an email confirming his submission

- After approval of the Program Administrator the Card application is sent to **American Express**

Questions?

A Program Administrator who has questions regarding a specific Card application can call our Corporate Customer Service on phone number +32 (0)2 676 29 26.

If a Card applicant has a question, he/she can refer to you, the Program Administrator of his/her company.

If you do not receive emails from our e-Application, please refer to the IT department of your company. They can check, if the mails are blocked by the spam filter. The IT department should be able to resend the blocked emails and can adjust the spam filter so you can receive our mails with the sender **@eapp.americanexpress.com** and **@email2.americanexpress.com**