

 conferma



 setup™

# What you need to know to get set up-with a virtual card account

In a nutshell, all Corporate clients need to contact their Issuer and Travel Management Company (TMC) to request the activation of virtual cards. Both parties then feed the necessary information into our Conferma SetUp portal where we complete the set-up process.

## The set-up process and timeline (4-6 weeks)

### 1. Request virtual card product from your TMC or Issuer (1 week)

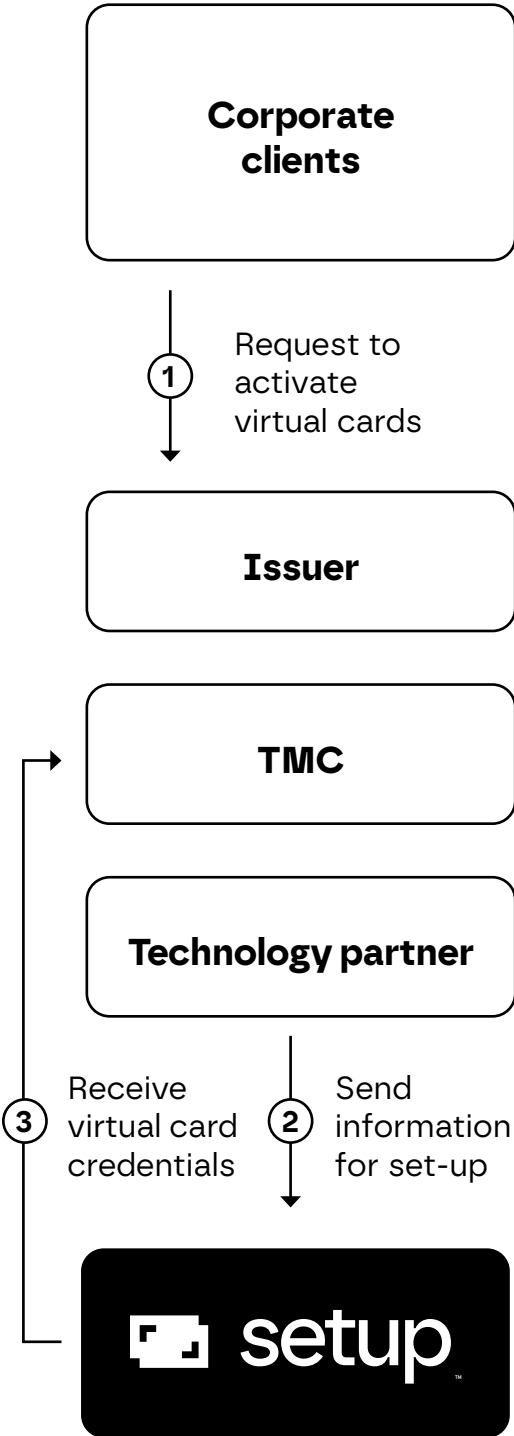
- Corporate clients request activation from Issuer
- Corporate clients request activation from TMC

### 2. Prepare required information for set-up (3-4 weeks)

- Issuer sends information to Conferma
- TMC sends information to Conferma
- TMC submits technology platform configuration requirements if applicable

### 3. Receive virtual account credentials (1 week)

- Conferma links the information received and completes set-up
- Conferma sends new virtual account credentials to TMC



# The set-up checklist

An essential checklist outlining the vital activities required to get a virtual card account set-up.

## Step 1 **Corporate client applies for a virtual card account**

- Corporate client applies for a virtual card account with their Issuer
- Corporate client subscribes to use virtual payment with their TMC
- Corporate client notifies top suppliers and hotels about the change in the form of payment for future purchases

## Step 2 **Issuer sets up and submits the virtual card account details**

- Issuer sets up a virtual card account for the Corporate client
- Issuer adds corporate data to daily transaction file feed
- Communication settings are configured, including folio data capture
- Issuer submits the virtual card account details to the Conferma SetUp portal  
<https://setup.conferma.com/Login.aspx>
- Issuer and Conferma perform virtual card account set-up quality assurance and testing

## Step 3 **TMC submits virtual card account details**

- TMC assists the Corporate client in defining requirements for travel policy, card tolerances (e.g. room and tax, % uplift), custom data fields to capture
- TMC submits details via the Conferma SetUp portal, providing details of the agency branch and/or agents who service the client and any technology platform configuration requirements  
<https://setup.conferma.com/Login.aspx>

## Step 4 **Conferma SetUp portal configures and releases the account**

- Conferma links the data received from the Issuer and the TMC
- Conferma sets virtual card account to LIVE and credentials are presented to TMC in the Conferma SetUp portal.
- The TMC and the Corporate client are provided with access to applicable Conferma tools: Conferma Online, Conferma Snap, Conferma App
- Conferma and the TMC confirm alias and codes to be used for the billing account (CAC = client account code)
- Agent and traveller notification settings are configured

## Step 5 **Go live and beyond**

- Product guides and demonstration videos are shared with the TMC for them to share
- The Corporate client, TMC and Issuer can access the Conferma knowledge bank at <https://help.conferma.com/>
- All new TMC partners are supported by the Business Development team for the first 6 weeks with their first live client



# Contact

We can't wait to get you set-up, here are some helpful links:

Submit virtual card account details to the Conferma SetUp portal:  
<https://setup.conferma.com/Login.aspx>

Access the knowledge bank and find answers to frequently asked questions:  
<https://help.conferma.com/hc/en-us>

Get in touch to clarify any of the steps:  
<https://help.conferma.com/hc/en-us/requests/new>

For any other queries please reach out to your dedicated account manager.

## Discover more

Get in touch with our team of payment experts  
[www.conferma.com/contact-us](http://www.conferma.com/contact-us)



New York

3 days left

\*8823

