



Conferma Pay

Set Up



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 Pay Set Up portal where we complete the set up process.

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

How everything fits together

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

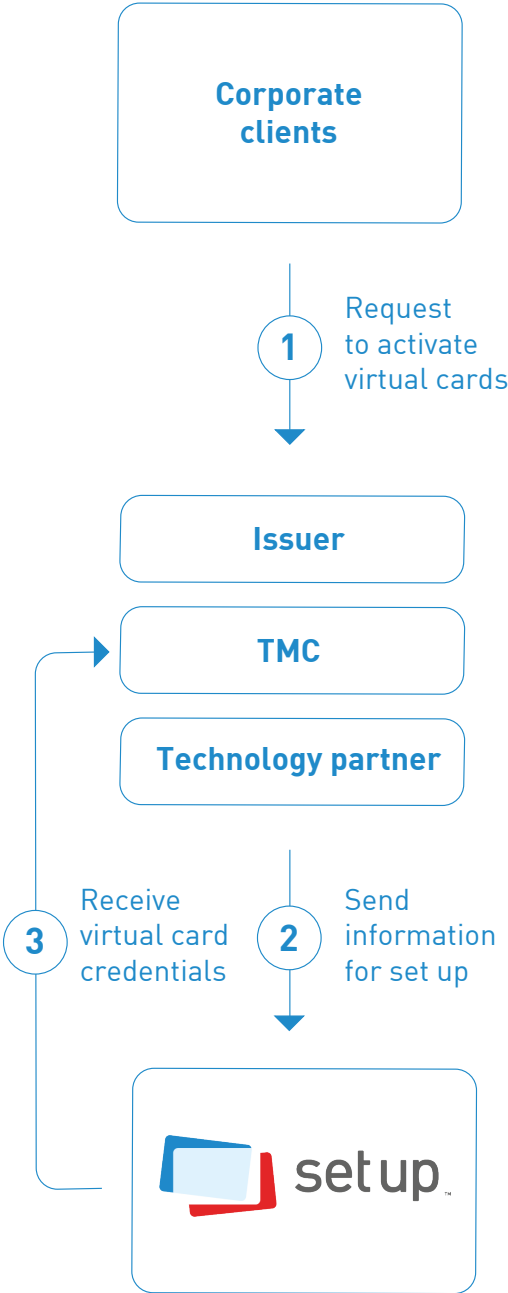
- Corporate clients request activation from Issuer
- Corporate clients request activation from TMC

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

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

3. Receive virtual account credentials (1 week)

- Conferma Pay links the information received and completes set up
- Conferma Pay 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 Pay Set Up portal <https://setup.conferma.com/Login.aspx>
- Issuer and Conferma Pay 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 Pay Set Up 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 Pay Set Up portal configures and releases the account

- Conferma Pay links the data received from the Issuer and the TMC
- Conferma Pay sets virtual card account to LIVE and credentials are presented to TMC in the Conferma Set Up portal.
- The TMC and the Corporate client are provided with access to applicable Conferma Pay tools: Conferma Pay Online, Conferma Pay Snap, Conferma Pay App
- Conferma Pay 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

Go live and beyond

Step 5

- Product guides and demonstration videos are shared with the TMC for them to share
- The Corporate client, TMC and Issuer can access the Conferma Pay 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 Pay Set Up 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

<https://confermapay.com/sales>