CitiManager® Site User Guide

GSA SmartPay®

Cardholder

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User Guide Overview

Document Scope

This CitiManager® Site User Guide provides detailed step-by-step instructions for all CitiManager Site functions available to Cardholders.

Screen captures in this guide contain dummy data for personal information and it is used for illustrative purposes only.

For a consolidated user guide, refer to the **CitiManager Quick Start Guide for Cardholders**.

Your Access May Vary

The functions you have access to are based on your role and entitlements. You may not have entitlements for all the functions described in this user guide. Some fields are defined at the agency/organization level so there may be variances in what is described in this user guide based on your agency/organization's setup.

A Note About Navigation

Most step-by-step instructions in this user guide assume you are already logged into the CitiManager Site. Refer to the **Log In to CitiManager Site** topic for the steps required to log in.

Unless otherwise noted, the step-by-step instructions begin from the CitiManager Site **Home** screen.

How Do I Activate My Card

Please sign your card immediately and confirm receipt of your card by following the instructions below:

1. Navigate to the Card Activation website.

    • Alternately, you may call 1-877-905-1861. From outside the U.S. and Canada, call 904-954-7850.

2. Enter the required information and follow the instructions on the website.

    • To activate this card you are required enter your Verification ID, which is the last four digits of your Social Security Number, Employee ID or other personal reference numbers as instructed by your employer for verification.

Getting Started in CitiManager

What is CitiManager?

Description

The CitiManager Site is a powerful online tool that allows Cardholders to view and manage their account at any time. Based on your agency/organization's set up, some of the key self-service activities may include:

• Retrieve a forgotten username or password
• View recent activity and current and past statements
• View credit limits, total balances and transaction level detail
• Make a payment
• Request a refund
• Manage e-mail and mobile alerts
• Dispute a transaction and view the dispute once it's submitted
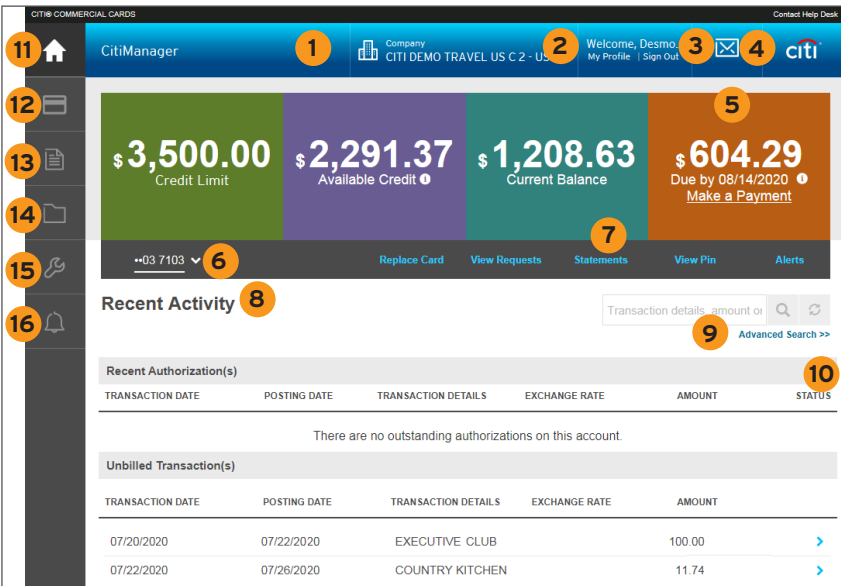• Manage preferences and update contact information

For agencies/organizations that have the Registration ID and Passcode feature turned on, the CitiManager Site will send you Registration ID and Passcode e-mails once activity is recorded on your Cardholder account. Once received, you can complete the CitiManager Site self-registration process to access your account details.
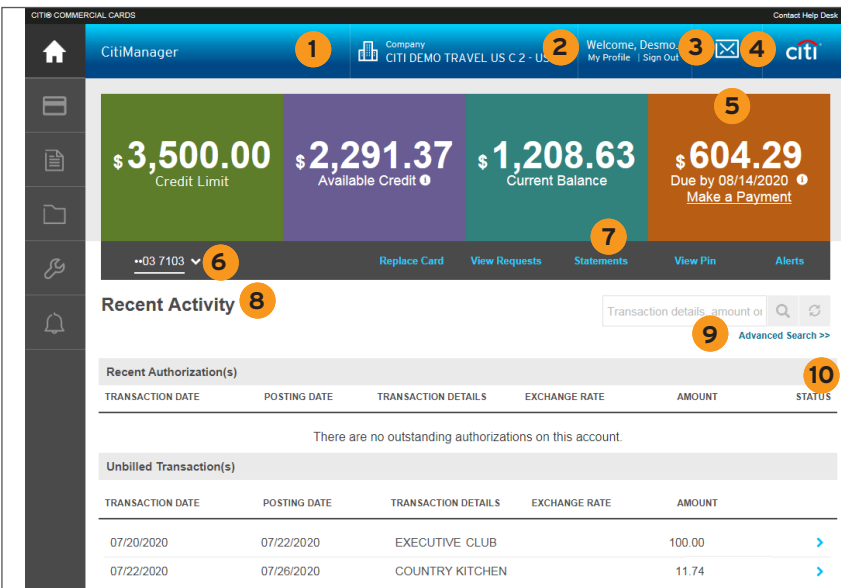
Basic Navigation

Key Concepts

After you log in to the CitiManager Site, the **Home** screen displays. The **Home** screen acts as a dashboard and displays a high level metric summary of your account – including your credit limit, total balance and available credit. You can also view recent transactions that have posted since your last statement. Use the navigation options from the header and the side navigation bar as well as quick links to navigate to additional account information and preferences.

Home Screen

Screen	Descriptions
	Header 1. Your agency/organization name displays at the top of the screen. If you have access to more than one agency/organization, you may select another one using the drop-down list. 2. Click the **My Profile** link to access or modify your profile details. 3. Click the **Sign Out** link to log out of the CitiManager Site. 4. Click the **Envelope** icon to view the **Message Board**. **Screen Components** 5. The dashboard section allows you to view high-level account metrics such as credit limit, total balance and available credit. If applicable, you can also click the **Make a Payment** link on the right. 6. The **Account** drop-down allows you to toggle between card accounts, if you have more than one. 7. Use the quick links displayed on the black bar to navigate to the **Request History**, **Statements**, **View PIN** and **Alerts Subscription** screens.

Screen	Descriptions

Screen

Descriptions

8. In the **Recent Activity** section, you can view **Recent Authorizations** which are authorized or declined transactions that have not yet posted to the account and **Unbilled Transactions** which have posted since your last statement and will appear on the next one.

9. The search field on the right is used to perform a basic transaction search by the details, amount or date. Click the **Advanced Search** link to narrow your search.

10. For each transaction row, a **>** **Forward** arrow displays on the right side, which you can click to navigate to the **Statements** screen.

Side Navigation Bar

11. Click the **Home** icon to return to the **Home** screen.

12. Click the **Cards** icon to view an overview of your card account, payment information, statements, aging of balance, recent transactions and your card contact information.

13. Click the **Statements** icon to select a monthly statement to view and also view recent activity, change your paperless settings and view disputes.

14. Click the **Resources** icon to view messages, access **FAQs** and **Links & Help**.

15. Click the **Tools** icon to navigate to other online tools, if you have access.

16. Click the **Alerts** icon to manage your alert subscriptions, view the audit log, and view on-demand mobile alert information.

Choose Your Language

Key Concepts

The CitiManager Site is available in 28 languages. You can change the language in which the CitiManager Site displays by selecting it from the **Login** screen before you log in to the site.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays*.
2.	From the **Choose Language** drop-down list that displays in the CitiManager Site header, select the desired language. *The CitiManager Site text displays in the selected language*.

Apply for New Card Using an Invitation Passcode

Key Concepts

Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required. Both are obtained from your Agency/Organization Program Coordinator (A/OPC).

Once you have submitted your application, you will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or your A/OPC.

You can view the status of your application in the CitiManager Site by using the username and passcode created during the application process to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional information.

Once your card application is approved, the account will be linked to the CitiManager Site username and password that was created during the application process. This will allow you to log in to the CitiManager Site to view balances, credit limits, statements and perform other self-service tasks.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays*.
2.	From the **CitiManager Site Login** screen **New Users** section, click the **Apply for card** link. *The User Registration screen displays*.
3.	Select the **Invitation Passcode** radio button.
4.	Click the **Continue** button. *User Registration – Invitation Passcode/Inviter's Emails screen displays*.
5.	In the **Invitation Passcode** field, type the Invitation Passcode sent to you by your A/OPC. **Note:** The Invitation Passcode is case sensitive.
6.	In the **Inviter's E-mail Address** field, type the inviter's e-mail address sent to you by your A/OPC.

Step	Action
7.	Click the **Continue** button. *The User Registration – Sign-on Details screen displays.* **Note:** All new applicants are required to create a user profile for the CitiManager Site during the application process.
8.	In the **Username** field, type a username that meets the username requirements. **Note:** The username requirements display in a window as you type your username. A checkmark displays when the requirements are fulfilled.
9.	In the **Password** field, type a password that meets the password requirements. **Note:** The password requirements display in a window as you type your password. A checkmark displays when the requirements are fulfilled.
10.	In the **Confirm password** field, re-type the password.
11.	From the **Helpdesk verification** question drop-down list, select the verification question. **Note:** You may be asked this question by Citi when you contact the Helpdesk for assistance or when retrieving your username or resetting your password.
12.	In the **Helpdesk verification** answer field, type the answer to the verification question you selected.
13.	In the **Personal Information** section, complete the required fields. **Note:** An asterisk (*) indicates a required field.
14.	Click the **Continue** button. *A confirmation message displays.* **Note:** The CitiManager Site sends an e-mail confirming the registration and username created.
15.	Click the **OK** button. *The User Registration Apply for Card – Card Application Details screen displays.* **Note:** If your agency/organization is configured for multiple companies and languages, the **Country and Language** screen will display. Select the applicable country and language and click the **Continue** button.
16.	Complete the required fields on the application. **Note:** An asterisk (*) indicates a required field. If you are unable to complete the required fields, you can save the application as a draft and return to it later.
17.	Click the **Submit** button. *An application submission confirmation message displays.*
18.	Click the **OK** button. *The CitiManager Site Login screen displays.* **Note:** The approving Supervisor or A/OPC will receive an e-mail advising them that your application is awaiting their approval.

Self-register as a Cardholder

Key Concepts

As a Cardholder it is possible to self-register for the CitiManager Site so you can view your account information, view statements and balances and perform other self-service tasks such as set your alerts or view your PIN.

To complete the self-registration process, you will need the following information:

• Your credit card number.
• The CVV security code from the back of your credit card.
• The last four digits of your Employee ID/Social Security Number that were provided to you during the application process.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. **Note:** If you clicked the **Click to register today!** link from the Welcome to CitiManager e-mail sent to you, start the registration process from Step 3. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click the **Register as a Cardholder** link. *The Register for Online Access screen displays.*
3.	In the **Credit Card Number** field, type your 16-digit credit card number.
4.	In the **Security Code (CVV)** field, type the CVV security code that displays on the back of your credit card.
5.	Click the **Continue** button. *The verify identity screen displays.*
6.	In the **Last 4 of Social — OR — Employee ID** field, type the number that was provided by your agency/organization during the application process. This number is either the last four digits of your social security number (SSN) or the last four digits of your Employee ID depending on your agency/organization set-up. **Note:** In Canada, the **Date of Birth** field displays. Type you date of birth in mm/dd/yyyy format or select it using the Calendar.
7.	Click the **Continue** button. *The Verification Method screen displays.*
8.	Select the radio button for the phone number where you want to receive the one-time passcode. **Note:** If you are not able to receive a one-time passcode using the available options, click the **Register using temporary credentials, we'll send to the email we have on file** link. The screen will refresh and a Registration ID and Passcode will be sent to your e-mail address. Enter your Registration ID and Passcode and continue to Step 12.
9.	Click the **Continue** button. *The One-Time Code field screen displays.*

Step	Action
10.	In the **One-Time Identification Code** field, type the one-time passcode code that was sent to the option selected. **Note:** The one-time passcode expires after three minutes and you have six attempts to enter it correctly. The time remaining displays at the top of the screen. If time expires before the one-time passcode is entered correctly, a message window displays. Click the **Try Again** button and then click the **Resend code** link to have a code sent again.
11.	Click the **Continue** button. *The Sign On Details screen displays.*
12.	In the **Username** field, type a username that meets the requirements. **Note:** If the username you entered already exists, you will be asked to enter a different one.
13.	In the **Password** field, type a password that meets the requirements.
14.	In the **Confirm Password** field, re-type the password.
15.	In the **Primary Email Address** field, verify the e-mail address that is pre-populated based on the e-mail address provided during the application process and update it if necessary. **Note:** This is the e-mail address that will be used as your primary e-mail address in your CitiManager Site Profile.
16.	In the **Alternate Email Address (Optional)** field, type an alternate e-mail address. **Note:** This is an optional field. The alternate e-mail address can be used for alerts.
17.	Click the **Continue** button. *The Client Services Verification screen displays.*
18.	From the **Client Services Question** drop-down list, select the question that will be used to verify your identity when you call Customer Service.
19.	In the **Client Services Answer** field, type the answer to the question you selected. **Note:** This is a free-form field and it is not case sensitive.
20.	In the **Confirm Client Services Answer** field, re-type the answer to the question you selected.
21.	Click the **Continue** button. *The Review and Register screen displays.*
22.	Review the information displayed and when you are finished, click the **Register Account** button. *The Confirmation screen displays indicating you have successfully registered your account.*
23.	To continue to the CitiManager Site, click the **Sign On** button. *The Security Questions screen displays.* **Note**: When you log in for the first time, you will be asked to select and answer three challenge questions. For subsequent logins, you may be asked to answer one of the challenge questions to complete the log in process.
24.	Select, answer and confirm three challenge questions and click the **Save** button. *The CitiManager Site Home screen displays.* **Note:** You cannot select a challenge question more than once.

Login to the CitiManager Site

Key Concepts

In order to access your account information in the CitiManager Site, you must use a valid username and password and then answer a challenge question.

Depending on your agency/organization set-up, you may be prompted to enter a one-time passcode (OTP) during the log in processes. If prompted, you will select a receipt option from the available options. Once you enter the OTP, the CitiManager **Home** screen displays and you will not need to answer a challenge question.

If you cannot remember your username or password, refer to the **Retrieve Forgotten Username** or **Reset Forgotten Password** topics in this user guide.

If you need additional information about CitiManager Site self-registration, refer to the **Self-register as a Cardholder** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login.
	The CitiManager Site Login screen displays.
2.	In the **Username** field, type your username.
3.	In the **Password** field, type your password.
4.	Click the **Sign In** button.
	The Challenge Question or One-time Passcode receipt options screen displays.
	Note: When you log in to the Citi Manager Site for the first time you must select and answer three challenge questions. Each time you log in, you may be asked to answer one of the challenge questions.
	Depending on your agency/organization set-up, the One-time Passcode receipt option screen may display. Select how you would like to receive your one-time passcode and click the **Continue** button. When the eight-digit code is received, type it in the field displayed on the CitiManager Site **One-time Passcode** screen and click the **Continue** button. The one-time passcode expires after five minutes (300 seconds). If you enter a OTP, you will not be prompted to answer a challenge question and the CitiManager Site **Home** screen displays.
5.	If necessary, answer the challenge question and click the **Continue** button.
	The CitiManager Site Home screen displays.
	Note: You have three attempts to answer the challenge question correctly.

Log Out of the CitiManager Site

Key Concepts

When logging out of the CitiManager Site, be sure to use the **Sign Out** link so the system closes all your current session information properly.

Do not close the CitiManager Site by clicking the browser or tab **Close [X]** button. Even though the browser/tab closes, your session remains open. You will either need to clear your cache or close your browser to end the session.

You will be automatically logged out of the CitiManager Site after 15 minutes of inactivity. If you receive an expiration warning message, you can click the **OK** button to keep your session open.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **Sign Out** link. *The screen refreshes and the CitiManager Site Login screen displays.*

Retrieve Forgotten Username

Key Concepts

If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

To retrieve your username, the following information is required:

• Your full account number
• The embossed name as it appears on your card
• Your Helpdesk verification answer

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	Click the **Forgot username?** link. *The Forgot Sign On – Username screen displays.*
3.	Select the **Cardholder** radio button and click the **Continue** button. *The Forgot Sign On – User Name – Select Role screen displays.*
4.	In the **Embossed Name** field, type the embossed name as it appears on your card.
5.	In the **Account Number (full number)** field, type the full account number as it appears on the card.
6.	In the **Enter the code in image** field, type the CAPTCHA displayed in the shaded image. **Note:** To listen to the CAPTCHA code, select the **Select Audio Challenge** checkbox and click the **Play Audio** button.
7.	Click the **Continue** button. *The Helpdesk Verification screen displays.*

Step	Action
8.	In the **Helpdesk Verification Answer** field, type the answer to the verification question and click the **Continue** button. *The OTP Details screen displays.*
9.	From the **OTP Details** screen, select the appropriate contact option and click the **Continue** button. *A passcode is sent via text message or phone call depending on the option you have selected.*
10.	In the **One-Time Passcode** field, type the passcode you were provided and click the **Continue** button. *A confirmation message displays.*
11.	Click the **OK** button. *The system sends your username to the e-mail address on file.*

Reset Password

Key Concepts

If you forget your password, or it becomes locked, you will need to reset it in order to login to the CitiManager Site.

To retrieve your password, the following information is required:

- A valid username
- The last six digits of your account number
- Your Helpdesk verification answer

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	Click the **Forgot password?** link. *The Forgot Password – Select Role screen displays.*
3.	Select the **Cardholder** radio button and click the **Continue** button. *The Forgot Password – Enter Details screen displays.*
4.	In the **Username** field, type your username.
5.	In the **Card Number** field, type the last six digits of your account number.
6.	In the **Enter the code in image** field, type the CAPTCHA displayed in the shaded image. **Note:** To listen to the CAPTCHA code, select the **Select Audio Challenge** checkbox and click the **Play Audio** button.
7.	Click the **Continue** button. *The Helpdesk Verification screen displays.*

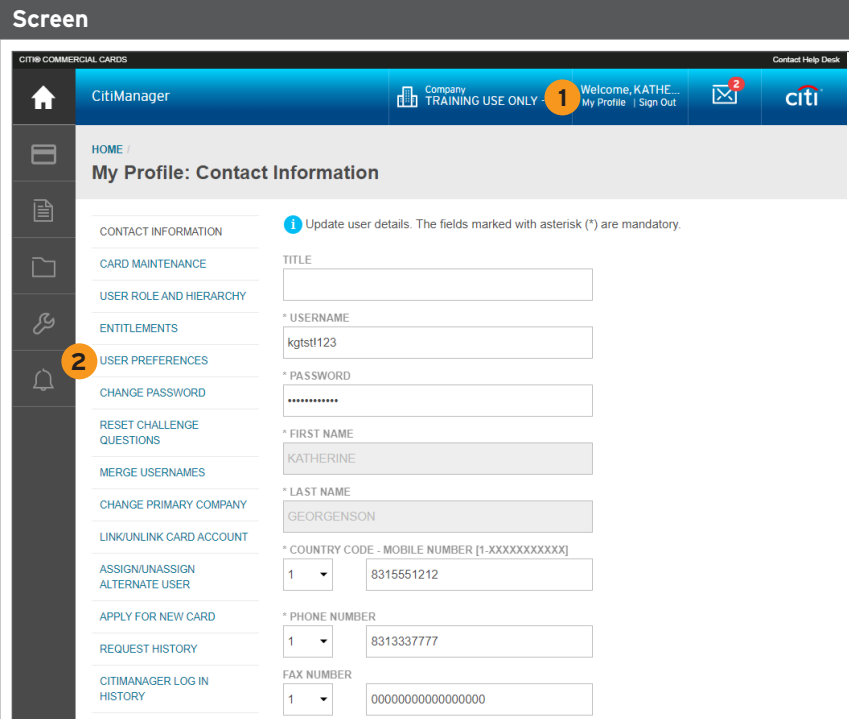| Step	Action
8.	In the **Helpdesk Verification Answer** field, type the answer to the verification question and click the **Continue** button. *The Forget Password - OTP Details screen displays.*
9.	From the **OTP Details** screen, select the appropriate contact option and click the **Continue** button. *A passcode is sent via text message or phone call depending on the option you have selected.*
10.	In the **One-Time Passcode** field, type the passcode you were provided and click the **Continue** button. *A confirmation message displays.*
11.	Click the **OK** button. *A message displays indicating a temporary password has been generated and sent to your e-mail address. Use this password to login to the CitiManager Site. You will be prompted to create a new password.*

My Profile Overview

Description

The **My Profile** screen is used to access links that are used to view your user role, hierarchy and entitlements. Additionally, you may update the following depending on your entitlements:

- CitiManager Site contact details
- User preferences such as language, date and time format and currency
- Password
- Reset challenge questions
- Merge CitiManager Site user names if you have more than one
- Change your primary agency/organization if you are assigned more than one
- Link/Unlink another card account
- Assign/Unassign Alternate user
- View application and maintenance request history
- CitiManager Site log in history

My Profile Screen

Screen	Descriptions
	1. Click the **My Profile** link from the header to access the **My Profile: Contact Information** screen and links used to view and maintain your profile information. 2. From the **My Profile** screen, the links displayed on the left side allow you to view and maintain your profile information such as role, hierarchy, entitlements and passwords.

Update Contact Information

Key Concepts

There are times when it may be necessary to update the contact information associated with your CitiManager Site user profile. The following information associated with your CitiManager Site profile can be updated:

- Title
- Username
- Mobile phone number
- Phone number/contact number
- Fax number
- User profile e-mail address

To update the contact information and the address associated with your card/statement, refer to the **Perform Card Maintenance** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Update the necessary contact details associated with your CitiManager Site profile. **Note:** An asterisk (*) indicates a required field. The **Mobile Phone Number** field is a required field. If you choose not to provide your mobile phone number, you must select the opt out checkbox. Otherwise, you will not be able to save your changes.
3.	When you are finished, scroll to the bottom of the screen and click the **Save Changes** button. *A confirmation message displays at the top of the screen.*
4.	To view a log of changes that have been made to your contact information, click the **Audit Log** link. *The Audit Log screen displays the date/time of change, previous and current values and the status.*

Perform Card Maintenance

Key Concepts

If your agency/organization allows Cardholders to perform online maintenance using the CitiManager Site, you can update the following information associated with your card/statement:

- Contact Information
- Employee ID

If your agency/organization does not allow Cardholder to perform online maintenance using the CitiManager Site this link will not display.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Card Maintenance** link. *The Card Maintenance screen displays.*
3.	Make any change to the contact information associated with your card/statement and when you are finished, scroll to the bottom of the screen and click the **Submit** button. **Note:** An asterisk (*) indicates a required field. *A confirmation window displays.*
4.	Click the **OK** button. *The Request History screen displays your application and maintenance requests.*

View User Roles and Hierarchy

Key Concepts

In some instances users are assigned more than one role in the CitiManager Site. For example, you may have Cardholder, A/OPC, Approving Official or Designated Billing Officer access.

You can view the roles you've been assigned as well as your hierarchy.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **User Role and Hierarchy** link. *The User Role and Hierarchy screen displays. The roles you have been assigned and your hierarchy display.*

View Entitlements

Key Concepts

You can view the entitlements and tools assigned to you based on your role.

Entitlements that may be assigned to you include:

• Make a payment
• View statements
• Request a refund
• View authorizations
• Manage alerts

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Entitlements** link. *The Entitlements screen displays. By default, all the entitlements you have been assigned display.*

Update User Preferences

Key Concepts

It is possible to update the following CitiManager Site user preferences:

- Help Desk verification question and answer
- Language
- Hierarchy Sorting (Unit name or number)
- Date Format
- Time Format
- Time Zone
- Currency Format

The Help Desk verification question/answer is used to confirm your status with Citi when you call the Help Desk for assistance (Corporate and Federal Government clients, except Department of Defense).

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **User Preferences** link. *The User Preferences screen displays.*
3.	Make any necessary changes to your user preferences. **Note:** An asterisk (*) indicates a required field.
4.	When you are finished, click the **Save Changes** button. *A confirmation message displays at the top of the screen.*

Change Password

Key Concepts

While passwords in the CitiManager Site do not expire, you can change it at any time if you feel it has been compromised.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Change Password** link. *The Change Password screen displays.*
3.	In the **Your Current Password** field, type your current password.
4.	In the **Create New Password** field, type your new password. **Note:** The password requirements display in a window as you type. An **X** displays for each requirement until it has been fulfilled.
5.	In the **Confirm New Password** field, re-type your new password.
6.	Click the **Change Password** button. *A confirmation message displays at the top of the screen.*

Reset Challenge Questions

Key Concepts

Because the CitiManager Site requires dual authentication you may need to answer an additional security question after you enter your username and password during the log in process.

You must select and answer three challenge questions when initially registering for the CitiManager Site and when you reset your existing challenge questions.

You may change your challenge questions and/or their answers at any time. Once you submit the request to reset your challenge questions, you need to log in to the CitiManager Site and when prompted select and answer your new challenge questions.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Reset Challenge Questions** link. *The Reset Challenge Questions screen displays prompting you to answer one of your existing challenge questions.*
3.	Type the answer to the existing challenge question displayed.
4.	Click the **Confirm** button. *A confirmation message displays at the top of the screen. The next time you log in to the CitiManager Site, you will be prompted to select and answer three new challenge questions.*
5.	From the CitiManager Site **Login** screen, type your username and password and then click the **Login** button. *The set security challenge question screen displays.*
6.	Select your three challenge questions from the drop-down list and then type the answer for each. **Note:** You must select three different questions and the answer for each must be unique and have at least three characters. If you enter inaccurate information, click the **Clear** button before saving.
7.	Click the **Save** button. *The CitiManager Home screen displays.*

Merge Usernames

Key Concepts

As a CitiManager Site user you may have more than one username based on your role or responsibilities. If this is the case, you can merge two active usernames into one, eliminating the need to log in separately to each account and manage each separately. After the merge is complete, the alternate username will be deactivated.

Be sure to merge any usernames for which you have fewer permissions into the one that has the most permissions. This will ensure that you have all the permissions you are entitled to under one username.

Before you merge your usernames, be sure you are logged in to the CitiManager Site using the username you wish to keep. This username will be kept as the primary username.

You can only merge two usernames at a time. You must repeat the merge process to add additional accounts.

If you already have a card account but have not registered it in the CitiManager Site, you can link it to your existing CitiManager username without creating another login, username and password. Refer to the **Link a Card Account** topic in this User Guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Merge Usernames** link. *The Merge Usernames screen displays.*
3.	Click the **Start Merge** button. *The Disclaimer screen displays.*
4.	Read the disclaimer information displayed and when finished click the **Continue** button. *The Login screen displays.* **Note:** By clicking the **Continue** button, you are acknowledging that you have read and understand the conditions for merging your usernames.
5.	In the **Alternate username** field, type your alternate username.
6.	In the **Password** field, type the password for the alternate username.
7.	Click the **Continue** button. *The Challenge Question screen displays and you are prompted to answer one of the challenge questions associated with the alternate username you are merging.*
8.	In the challenge question field, type the answer to the challenge question.
9.	Click the **Complete Merge** button. *You are logged out of system and returned to the CitiManager Log In screen*
10.	Log back in to the CitiManager Site using the primary username and all of your permissions will be available from that username.

Change Primary Company (Agency/Organization)

Key Concepts

As a Cardholder, you may have more than one agency/organization. For example, you may have both a Travel and Purchase card. When logging in to the CitiManager Site your view defaults based on which has been set as your primary agency/organization.

While you can change the agency/organization account using the drop-down list that displays in the header of the CitiManager Site, you can also change the default so when you log in to the CitiManager Site the preferred agency/organization account displays by default.

You cannot change your primary agency/organization if only one has been assigned to you.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Change Primary Company (Agency/Organization)** link. *The Change Primary Company (Agency/Organization) screen displays.*
3.	Select the radio button for the agency/organization you wish to set as your default.
4.	Click the **Save** button. *The default agency/organization is saved and a confirmation message displays at the top of the screen.*

Link a Card Account

Key Concepts

If you already have a card account but have not registered it in the CitiManager Site, you can link it to your existing CitiManager username without creating another login, username and password.

Once you have linked your card accounts you will be able to select which account you wish to view from the **Home, Card Details** or **Statements** screens.

You will need the following card details for the account you wish to link:

• Card Number
• Account Name
• Address

The account name, address and zip code must match what appears on your billing statement exactly.

If you have more than one CitiManager username (for example, a Cardholder and Non-Cardholder username) and you would like to merge them so you don't have to login separately to each, refer to the **Merge Usernames** topic in this User Guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Link/Unlink Card Account** link. *The Card Details screen displays.*
3.	Click the **Link Card Account** button. *The Link Card Account screen displays.*
4.	In the **Card Number** field, type your card number exactly as it appears on your billing statement, no spaces or dashes.

Step	Action
5.	In the **Name On Card** field, type the account name exactly as it appears on your billing statement.
6.	In the **Contact Details** section, type the billing address for your card exactly as it appears on your billing statement. **Note:** If your zip code is nine digits, then enter all nine digits. If you zip code is only five digits, then only enter five digits. An asterisk (*) indicates a required field.
7.	Click the **Continue** button. *A confirmation message and the Card Account screen display. The card account you just linked is now listed.*

Unlink a Card Account

Key Concepts

If you linked additional card accounts to your user profile, you can remove them when they have been closed, reported as lost-stolen and a new card has been issued.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Link/Unlink Card Account** link. *The Card Details screen displays.*
3.	Select the radio button for card number you wish to remove from your user profile.
4.	Click the **Unlink Card Account** link. *The confirmation screen displays.*
5.	Verify you have selected the correct account and click the **Confirm** button. *A confirmation message displays at the top of the screen.*

Assign Alternate User

Key Concepts

In accordance with your agency/organization policies, you can assign alternate users to your card account so others can access your account information, make maintenance requests (if your program allows) or make payments to individually billed accounts on your behalf.

You can assign an existing CitiManager Site user or assign a new one. Complete a search for an existing user first, and if they are not currently registered as a CitiManager Site user they must be created first. Once they are created, registration details will be sent to the new user. When user completes the registration process they will be assigned as your alternate user.

Step-by-Step Instructions

To Assign Existing User

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Assign/Unassign Alternate User** link. *The Alternate User screen displays.* **Note:** If there is already an alternate user assigned to your card account, their name will be listed. To unassign the user, refer the **Unassign Alternate User** topic in this user guide.
3.	Click the **Assign** link. *The Search/Create User screen displays.*
4.	Type your search criteria and click the **Search** button. *A list of users that meet your search criteria displays.* **Note:** If the user you searched for is not a current user, a message displays indicating there are no alternate users available. You will need to create them before they can be assigned. Refer to the **Assign a New User** steps in this topic for additional information.
5.	Click the radio button for the user to be assigned and click the **Add User** button. *A confirmation displays and you are returned to the Alternate User screen and the assigned user name displays.*

Step-by-Step Instructions

To Assign a New User

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Assign/Unassign Alternate User** link. *The Alternate User screen displays.*
3.	Click the **Assign** button. *The Search/Create User screen displays.*
4.	Click the **Create User** link displayed in the **Search Users** header. *The Create User screen displays.*

Step	Action
5.	Complete the required fields in the **Personal Details, Contact Details, User Role(s)** and **Entitlements** sections.
	If necessary, click the **+** (expand) button to view the fields for each section.
	Ensure you have reviewed and as necessary modified the selections in the **Entitlements** section. Statements and Unbilled Transactions (Recent) are not considered default entitlements.
	Note: An asterisk (*) indicates a required field.
6.	When you are finished with all sections, click the **Continue** button.
	The Confirm User screen displays.
7.	Review the details you entered for the new user. When you are finished, click the **Save** button.
	A confirmation message displays indicating the user has been successfully created.
	Note: Registration details will be sent to the new user so they can create a username and password for the CitiManager Site.
8.	Click the **OK** button.
	The Alternate User screen displays.
	Note: The new user's name displays with a status of **Unregistered**. Once the user completes the registration process the status will change to **Registered** and they will have access to your account.

Unassign Alternate User

Key Concepts

If you have assigned an alternate user to your card account, you can unassign them if you no longer want them to have access to your information.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name.
	The Contact Information screen displays.
2.	Click the **Assign/Unassign Alternate User** link.
	The Alternate User screen displays the name(s) of alternate users you have assigned to your card account.
	Note: If no alternate users are assigned, a message displays indicating no alternate users are available. You can assign an alternate user by clicking the **Assign** button.
3.	Select the checkbox for the user you wish to unassign from your card account.
4.	Click the **Unassign** button.
	A confirmation screen displays.
5.	Verify the name displayed is the user you wish to unassign and click the **Confirm** button.
	A confirmation displays at the top of the screen.

View Application and Maintenance Request History

Key Concepts

You can view information about your account application and maintenance requests including the following information:

- Request ID
- Status
- Request Type
- The date the request was last modified
- Audit information such as which fields have changed, when they were updated and by whom
- Hierarchy

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Request History** link. *A list of application and maintenance requests display.* **Note:** If there are no requests, a message displays indicating there are no requests for this user. You can sort the requests by clicking on header in which you'd like to sort the requests.
3.	To view the hierarchy, click the **ellipsis (…)** link that displays on the right-side of the row you wish to expand.
4.	To view the details of a specific request, from the **Request ID** column, click the link for the desired request. *The application or maintenance request details display with the approval history.* **Note:** To view additional information from the **Contact Information, Additional Information, Spending Controls** sections or to view the **CitiManager Cardholder Account Agreement**, click the **+** (expand) button from the section header as necessary. To view the Audit Log, scroll to bottom of screen and click the **View Audit Log** button. When you are finished, click the **Back** button. To return to the list of maintenance requests, click the **Cancel** link at the bottom of the screen then click the **OK** button.

View CitiManager Log In History

Key Concepts

When you first log in to the CitiManager Site, a message at the top of the **Home** screen displays your login history. You can also view this information from the **CitiManager Log In History** screen.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **CitiManager Log In History** link. *The CitiManager Log In History screen displays your login history.*

Cards Overview

Description

The **Card Details** screen provides a high-level summary of your card account information including the following:

- **Card Overview:** Card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code
- **Payments:** Last payment made, next payment due, view history (if entitled)
- **Statements:** Recent transaction activity, previous statements
- Aging of balance information (1 – 120+ Days)
- Contact information associated with your card/statement

Depending on your program and agency's/organization's settings, you may also be entitled to perform account maintenance, request a refund and view refund requests.

Card Details Screen

Screen	Descriptions
	1. The **Card Information** section displays the **Name on Card, Card Name, Account Status, Hierarchy, Employee ID, Credit Limit, Total Balance, Cost Center** and **Default Accounting Code** fields and payment information such as **Last Payment Made** and **Next Payment Due**.
	2. In the **Statements** section click the **Recent** or statement date icons to view recent transactions or current and previous statements.
	3. The **Aging of Balance** section displays historical balances from 1 to 120 days.
	4. The **Card Contact Information** section displays the contact information associated with your card or statement including name, address, phone numbers and e-mail address.
	5. On the right-side of screen, additional links display based on your entitlements. Links could include **Card Maintenance, Request Refund, View Refund** or **View PIN**.

View Card Details

Key Concepts

The **Card Details** screen provides a high-level summary of your card account information including the following:

- **Card Overview:** Card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code
- **Payments:** Last payment made, next payment due, view history (if entitled)
- **Statements:** Recent transaction activity, previous statements
- Aging of balance Information (1 – 120+ Days)
- Contact information associated with your card/statement

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon. *The Card Details screen displays.* **Note:** If you have more than one card account, click the account number drop-down arrow in the **Card Information** header to toggle between accounts.
2.	View the desired card account information in the **Card Overview**, **Payments**, **Statements**, **Aging of Balance** and **Card Contact Info** sections.
3.	If your agency/organization allows it you can view payment history. From the **Payments** section, click the **View History** link. If you are not entitled, this link will not display. *The Scheduled & Last Payments screen displays showing pending payments and past payments.* **Note:** To search for a specific transaction amount, date or pay from account number, type the search criteria in search field that displays in the upper-right corner and click the **Search** button. Click the **Advanced Search** link to access additional search criteria.
4.	To view recent transactions that have posted to your account but not yet billed to your statement, click the **Recent** icon from the **Statements** section. *The Statements screen displays defaulting to recent activity. A summary of activity displays at the top of the screen and transactions display at the bottom of the screen.* **Note:** Recent transactions will appear on your next statement. The recent activity summary is not a final statement. To search recent activity by transaction details (merchant), an amount or date, type the search criteria in search field that displays in the upper-right corner and click the **Search** button. Click the **Advanced Search** link to access additional search criteria. For additional information about viewing/downloading recent activity, refer to the **View and Download Recent Activity** topic in this user guide.
5.	To view previous statements, from the **Statements** section, click the icon for the statement date you wish to view. *The Statements screen for the selected date displays.*
6.	If your agency/organization allows it, you can maintain the contact information associated with your card/statement. On the right side of the screen, click the **Card Maintenance** link. *The Card Maintenance screen displays.* **Note:** For additional information about performing card maintenance online, refer to the **Perform Card Maintenance** topic in this user guide for additional information.

Perform Card Maintenance

Key Concepts

If your agency/organization allows Cardholders to perform online maintenance using the CitiManager Site, you can update following information associated with your card/statement:

- Contact Information
- Employee ID

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon. *The Card Details screen displays.* **Note:** If you have more than one card account, click the card number link from the **Card Information** header to toggle between accounts.
2.	On the right side of the screen, click the **Card Maintenance** link. *The Form screen displays.*
3.	Make any change to the contact information associated with your card/statement and when you are finished, scroll to the bottom of the screen and click the **Submit** button. **Note:** An asterisk (*) indicates a required field. *A confirmation message displays at the top of the screen.*

View and Attach Account Documents

Key Concepts

You can view and attach documents (such as certificates of training or signed statements of understanding) to your account in the CitiManager Site and they will stay with your account if you should move to another location. This will assist in the tracking of training certificates and statements of understanding.

A maximum of five attachments may be added. Each file must be 5MB or less.

The following file types are supported:

- .jpg
- .jpeg
- .png
- .pdf

You can view, attach and delete account documents.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon. *The Card Details screen displays.*
2.	On the right side of the screen, click the **View Account Documents** link. *The View Account Documents screen displays.*

Step	Action
3.	To view an attached document:

To view an attached document:

    a) From the **Document Name** column, click the link for the document you wish to view.

       The document to be downloaded window displays.

    b) Click the **Download** button.

       A message displays indicating the document may be cached to your computer.

    c) Click the **OK** button.

       A confirmation message displays at the top of the screen and the browser open/save options window displays.

    d) Click the **Open** button.

       The document opens.

To attach a new document:

    a) Click the **Add Document** button.

       The upload window displays.

    b) In the **Document Name** field, type the name of the document. The document name cannot contain any special characters.

    c) Click the **Browse** button and navigate to the document you want to attach then click the **Open** button.

       The upload window displays and the name of the document to be attached displays in the Select File to Upload field.

    d) Click the **Upload** button.

       The document is attached and the name will display on the View Accounts Documents screen.

To delete an attachment:

    a) Click the **Delete** link for the document you wish to delete.

       A confirmation message displays.

    b) Click the **OK** button.

       The document is deleted.

To download an attachment:

    a) Click the **Download** link that displays at the top of the screen.

       The format window displays.

    b) Select the desired format for the download and click the **Download** button.

       A message displays indicating the document may be cached to your computer.

    c) Click the **OK** button.

       A confirmation message displays at the top of the screen and the browser open/save options window displays.

    d) Click the **Save** button.

       A message displays indicating the download is complete.

View PIN

Key Concepts

During the activation process, you are prompted to set up a four-digit PIN that may be used at certain merchant terminals. In order to process your transaction, some merchants require that you enter the four-digit PIN as an additional layer of security.

You can view your PIN in the CitiManager site. If you would like to change your PIN, please contact Citi using the number on the back of your card.

To view your PIN in the CitiManager site, you are required to enter either a one-time passcode (OTP) or the CVV/CVC (security code) from the back of your card. The OTP option is only available if your mobile number/office numbers have been entered on your user profile. If your mobile number/office numbers have not been entered on your user profile, you are required to enter the CVV/CVC from the back of your card.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon. *The Card Details screen displays.* **Note:** You can also click the **View Pin** link from the quick links on the **Home** screen. If you have more than one card account, click the account number drop-down arrow in the **Card Information** header to toggle between accounts.
2.	Click the **View PIN** link that displays on the right-side of the screen. *The Card Details: View PIN screen displays either the OTP receipt options or the CVV/CVC Code field.*
3.	If the OTP receipt options display, select the radio button for the desired option (text message or call) and click the **Continue** button. Once you have retrieved the OTP, enter it in the **One-Time Passcode** field and click the **Continue** button. OR If the **CVV/CVC Code** field displays, type the CVV/CVC code from the back of your card and click the **Continue** button. *Your PIN displays.*

Replace Lost/Stolen/Never Received/Damaged Card

Key Concepts

When a card has been lost, stolen, never received or damaged you are able to:

• Initiate a card replacement in the CitiManager Site.
• Choose the shipping address (either current mailing address or an alternate).
• Choose a delivery method (standard or express if available based on your agency/organizations options).

When there is fraud, the system places a temporary block on the account, and you are asked to call Customer Service to report the fraudulent transaction(s) and arrange for a replacement card.

You are only allowed to initiate the replacement if last card issued date has elapsed 15 days.

The steps required for initiating a replacement card vary based on the reason for the request. Complete the appropriate procedure based on one of the scenarios outlined below:

• Initiate replacement for lost, stolen or never received card — fraudulent activity.
• Initiate replacement for lost, stolen or never received card — no fraudulent activity.
• Initiate replacement for damaged card.

Initiate Replacement For Lost, Stolen Or Never Received Card — Fraudulent Activity

Step-By-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon. **Note:** You can also click the **Replace Card** link that displays on the black navigation bar in the center of the **Home** screen and continue to Step 3. *The Cards Detail screen displays.*
2.	Click the **Replace Lost/Stolen/Never Received/Damaged Card** link that displays on the right-side of the screen. *The Replace Lost/Stolen/Never Received/Damaged Card screen displays.* **Note:** This link only displays if status of the card is **Open**.
3.	Review the information displayed in the **Card Information** section to verify the correct card was selected and from the **Select Reason** drop-down list, select either **Lost**, **Stolen**, or **Never Received**.
4.	From the **Have you noticed any fraudulent transactions on your card** options, select the **Yes** radio button.
5.	Click the **Continue** button. *A message displays indicating the card will be blocked immediately.*
6.	Click the **OK** button. *A confirmation window displays indicating the card has been temporarily blocked and to contact Customer Service.* **Note:** Please call Customer Service to report the fraudulent transaction(s) and arrange for a replacement card.
7.	Click the **OK** button.

Initiate Replacement For Lost, Stolen Or Never Received Card — No Fraudulent Activity

Step-By-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon. **Note:** You can also click the **Replace Card** link that displays on the black navigation bar in the center of the **Home** screen and continue to Step 3. *The Cards Detail screen displays.*
2.	Click the **Replace Lost/Stolen/Never Received/Damaged Card** link that displays on the right-side of the screen. *The Replace Lost/Stolen/Never Received/Damaged Card screen displays.* **Note:** This link only displays if status of the card is **Open**.
3.	Review the information displayed in the **Card Information** section to verify the correct card was selected and from the **Select Reason** drop-down list, select either **Lost**, **Stolen**, or **Never Received**.
4.	From the **Have you noticed any fraudulent transactions on your card** options, select the **No** radio button.
5.	Click the **Continue** button. *Either the OTP Details or Card Delivery screen displays.*
6.	If a One-time Passcode is necessary, complete the following steps. Otherwise, continue to Step 9. a) Select the radio button for the desired receipt option and click the **Continue** button. b) Once received, type the One-time Passcode and click the **Continue** button. *The Card Delivery screen displays.*
7.	From the **Shipping Options** section, select either the radio button for **Current Mailing Address** or **Alternate Address**. If **Alternate Address** is selected, complete the **Address Line 1**, **City**, **State** and **Postal Code** fields. **Note:** If the card has a Bulk/Site address associated with it, the **Alternate Address** field will not display. Only a Program Administrator can request a card to be shipped to an alternate address.
8.	From the **Delivery Method** section, select the radio button for desired delivery method.

Step	Action
9.	Click the **Submit** button.
	A confirmation message displays, and the card will be blocked effective immediately.
	Note: If you are shipping the card to the default address and standard shipping is selected, a message displays that the card will be delivered within 7-10 days.
	If expedited shipping is selected, a message may display based on your agency/ organization set-up indicating the account will be charged a fee for expedited services.
	If a replacement card was previously requested and a subsequent replacement card request is being made while the first card could still be in the mail (within the expected delivery time), a message will display indicating a card has been recently issued on a specified date. Please allow ten business for that card to arrive. If you still need to report the card lost or stolen please contact Customer Service. If the expected delivery time for the replacement card has past and that card is lost, a message displays indicating that the card has been temporarily blocked and to contact Customer Service.
10.	Click the **OK** button.

Initiate Replacement For Damaged Card

Step-By-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** icon.
	Note: You can also click the **Replace Card** link that displays on the black navigation bar in the center of the **Home** screen and continue to Step 3.
	The Cards Detail screen displays.
2.	Click the **Replace Lost/Stolen/Never Received/Damaged Card** link that displays on the right-side of the screen.
	Note: This link only displays if status of the card is **Open**.
	The Cards Detail screen displays.
3.	Review the information displayed in the **Card Information** section to verify the correct card was selected and from the **Select Reason** drop-down list, select either **Damaged/Other**.
	Note: Selecting **Damaged/Other** initiates a card replacement and retains the existing account number.
4.	Click the **Continue** button.
	Either the OTP Details or Card Delivery screen displays.
5.	If a One-time Passcode is necessary, complete the following steps. Otherwise, continue to Step 8.
	a) Select the radio button for the desired receipt option and click the **Continue** button.
	b) Once received, type the One-time Passcode and click the **Continue** button. *The Card Delivery screen displays.*

Step	Action
6.	From the **Shipping Options** section, select either the radio button for **Current Mailing Address** or **Alternate Address**. If **Alternate Address** is selected, complete the **Address Line 1**, **City**, **State** and **Postal Code** fields.
	Note: If the card has a Bulk/Site address associated with it, the **Alternate Address** field will not display. Only a Program Administrator can request a card to be shipped to an alternate address.
7.	From the **Delivery Method** section, select the radio button for desired delivery method.
8.	Click the **Submit** button.
	A confirmation message displays.
	Note: If you are shipping the card to the default address and standard shipping is selected, a message displays that the card will be delivered within 7-10 days. The existing card will remain active until you receive and activate your new card.
9.	Click the **OK** button.
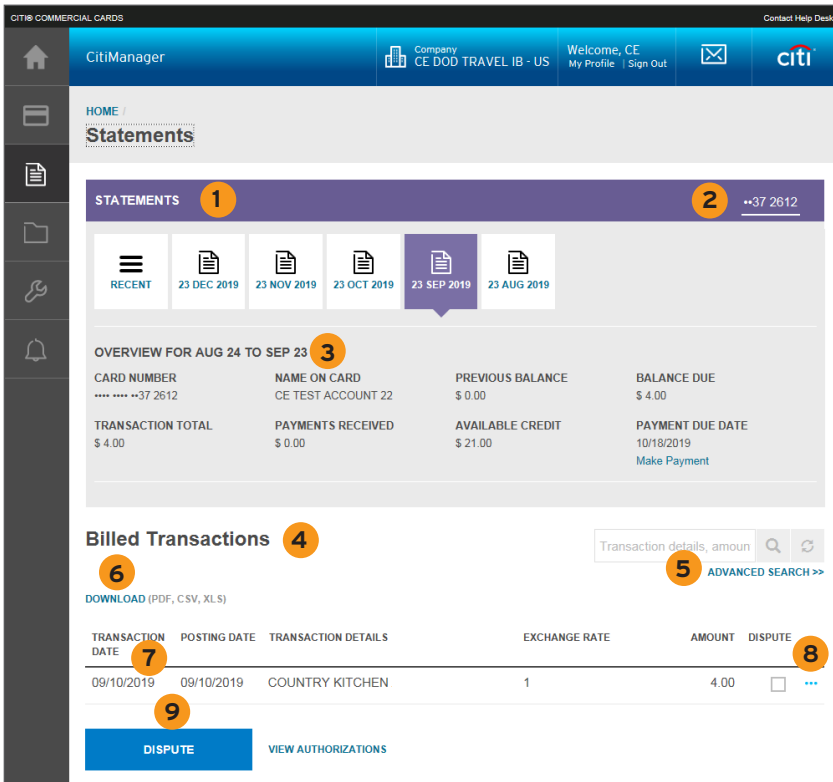
Statements Overview
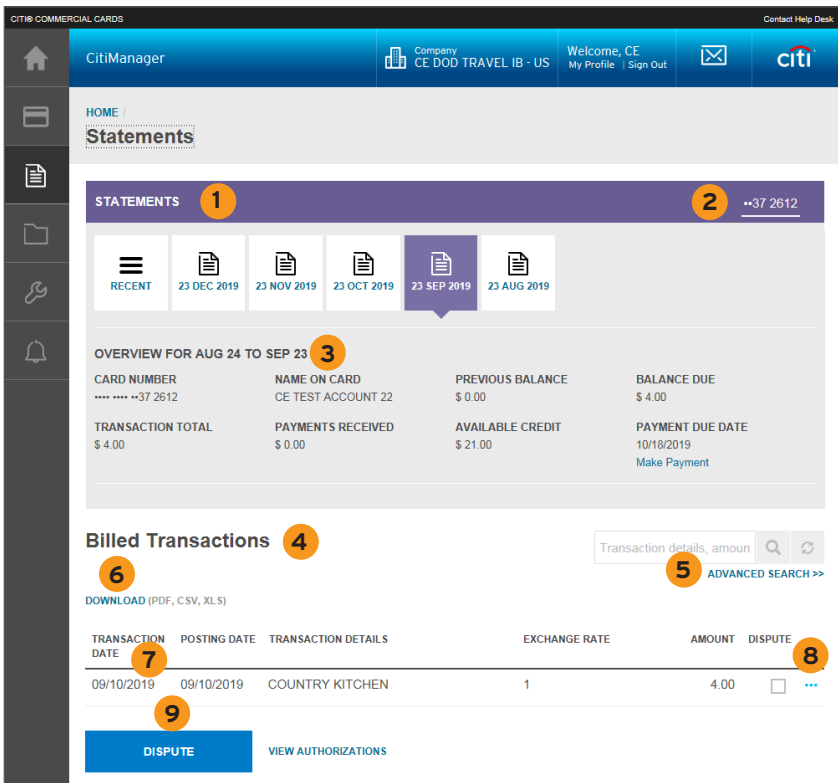
Description

The **Statements** screen displays an overview of your recent transactions, your current statement or a statement from the previous 72 months.

You can also download your statement and dispute a transaction.

Statements Screen

Screen	Descriptions
	1. The **Statements** section displays an overview of the selected statement. You can toggle between statements by clicking the **Recent** or statement date icons. 2. From the **Statements** section header use the **Account** drop-down arrow that displays on the right-hand side to toggle between accounts if you have more than one. 3. The **Overview** section displays balance and payment information for the statement date selected. 4. The **Billed Transactions** section displays a list of transactions and options to download transactions, search for transaction or expand the transaction details. 5. Use the search field to perform a basic transaction search by the details, amount or date. You may also click the **Advanced Search** link to narrow your search. 6. Click the **Download** link in the **Billed Transactions** section to download a statement. 7. The **Billed Transactions** section displays a list of transactions and each row includes information such as the transaction date, posting date, transaction details and amount.

Screen	Descriptions
	8. To view additional transaction details or to dispute a transaction, click the **ellipsis (...)** link that displays on the right-side of each transaction row.
	9. Click the **Dispute** button to initiate a dispute after selecting the transaction checkbox(s) from the **Dispute** column.

View and Download Statements

Key Concepts

You can view either your current statement or a previous statement. The previous 72 statements are retained. You can also view recent transactions that have not billed to your statement.

The **Statements** screen displays the following information:

- An account, balance and payment overview
- A list of transactions that have billed to your account
- Transaction details

From the **Statements** screen you can also download your statement and dispute a transaction. You can download transactions for individually or centrally billed accounts.

If you wish to print your statement, it's recommended you download it in PDF format. Once the PDF document is open, you can print it by selecting **Print** from the **File** menu.

Step-by-Step Instructions

To View Statements and Transactions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and then click the icon for the statement date you wish to view. Use the **Back** and **Forward** (‹ ›) arrows to navigate between years. You can also navigate to your statements from the **Home** screen by clicking the **Statements** link displayed on the right side of the screen or by clicking the icon for the statement date you wish to view from the **Card Details** screen. *The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.* **Note:** If you have more than one card account, click the account number drop-down arrow in the **Statements** header to toggle between accounts. To view transactions that have posted to your account but not yet to your statement, click the **View Recent** link.
2.	To search for a specific transaction amount, date or description, type the search criteria in search field that displays in the upper-right corner of the **Billed Transactions** section and click the **Search** button. Click the **Advanced Search** link to access additional search criteria. *The transactions are filtered by the search criteria entered.*
3.	To view additional transaction detail, click the **ellipsis (…)** link that displays on the right-side of the row you wish to expand. *The row expands and additional transaction details display.* **Note:** The **More** link displays when the row is expanded. For additional information about disputes refer to the **Dispute Transactions** topic in this user guide.

To Download Statements

Step	Action
1.	From the **Statements** screen, click the **Download** link that displays under the **Billed Transaction** header. *The download options display in a new window.*
2.	Select the radio button for the desired download format and click the **Download** button. **Note:** Download options include Comma Separated Value (CSV), Portable Document Format (PDF) or Excel. PDF is the default option. If you intend to print your statement, PDF is the recommended format. *A download message displays stating that the file will be cached to your computer.*
3.	Click the **OK** button. *A message displays at the top of the screen indicating your document is ready for download and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
4.	From the browser document option window, click the **Open** button. *The document opens in the selected format.* **Note:** Once the document is open, you can print it by selecting **Print** from the **File** menu.

Make a Payment

Key Concepts

If your agency/organization allows it, you can make an online payment. If paying from a Savings account and/or Credit Union, ensure your financial institution supports automated payments.

Before you can make a payment online you must enter your banking account information. The required information includes:

- Your bank routing number
- Your checking or savings account number

You may choose from the following payment amount options:

- Total amount due
- Minimum amount due
- Specified amount

Payment requests received by 4:00 p.m. Eastern Time (ET) on a bank business day are posted to your Citibank Card account on the same day.

Payment requests received after 4:00 p.m. ET on a bank business day will post the next business day.

Business days are Monday through Friday, excluding federal holidays.

For additional information about viewing your payment history, refer to the **View Scheduled and Past Payments (View Payment History)** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and then click the **Payments** link.
	You can also click the **Make a Payment** link that displays on the **Home** screen (under **Due in** date) or on the **Statements** screen (under the **Payment Due Date**).
	The Payments screen displays.
2.	Before you can make a payment online, your banking account information must be entered. If the desired pay from account information already exists, go to Step 7.
	To add a new pay from account, click the **Add** link from the **Select Payment Account** header.
	The Account Information window displays.
3.	From the **Account Type** drop-down list, select the appropriate pay from account type.
4.	In the **Bank Routing Number** field, type the bank routing code for the account.
	Note: The bank name will automatically populate after you type a valid routing number.
5.	In the **Bank Account Number** field, type the account number.
6.	Click the **Save** button.
	The new bank account is added.
	Note: To add another account, repeat Steps 2–6.
	To delete an existing account, select the radio button for the account and then click the **Delete** link that displays on the right side.
7.	To select the desired pay from account, select the appropriate radio button.

Step	Action
8.	In the **Select Payment Amount** section, select the radio button for the desired payment option. If you selected **Other amount**, type the payment amount in the text entry field.
9.	To schedule a payment in the future, type a date or select it from the calendar.
10.	To submit your payment, click the **Pay** button. *The Confirm Payment screen displays.*
11.	Review your payment information and click the **Confirm** button. *The Success screen displays your payment information and a confirmation displays at the top of the screen.*
12.	Click the **OK** button. *The Scheduled & Past Payments screen displays.*

View and Download Recent Transactions

Key Concepts

Recent unbilled transactions are transactions that have posted to your account but have not yet billed to a statement. The recent unbilled transactions that display will appear on your next statement. The information displayed on the **Recent** screen is not considered a final statement.

You can download transactions for individually or centrally billed accounts.

If you wish to print your recent transactions, it's recommended you download the transactions in Excel format. Once the document is open, you can print it by selecting **Print** from the **File** menu.

Step-by-Step Instructions

To View Recent Transactions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and then click the **View Recent** link that displays at the top of the fly-out menu. Recent transaction activity also displays on the **Home** screen. Click the **> More** arrow that displays on the right-side of each transaction row to navigate to the **Statements – Recent** screen. *The Statements – Recent screen displays. An overview of the account displays at the top of the screen. Recent activity displays at the bottom of the screen.* **Note:** If you have more than one card account, click the account number drop-down arrow from the **Statements** header to toggle between accounts.
2.	To search for a specific transaction amount, date or description, type the search criteria in search field that displays in the upper-right corner of the **Recent Activities** section and click the **Search** button. Click the **Advanced Search** link to access additional search criteria. *The transactions are filtered by the search criteria entered.*
3.	To view additional transaction detail, click the **ellipsis (...)** link that displays on the right-side of the row you wish to expand. *The row expands and additional transaction details display.* **Note:** The **More** link displays when the row is expanded. When you click the **More** link, the **Statements Action** window displays and you can initiate a dispute. For additional information about disputes refer to the **Dispute Transactions** topic in this user guide.

To Download Recent Transactions

Step	Action
1.	From the **Statements – Recent** screen, click the **Download** link that displays under the **Recent Activities** header. *The download options display in a new window.* **Note:** If you have more than one card account, click the account number drop-down arrow from the **Statements** header to toggle between accounts.
2.	Select the radio button for the desired download format and click the **Download** button. **Note:** The download options are Comma Separated Value (CSV) or Excel (XLS). Excel is the default option. If you intend to print your statement, Excel is the recommended format. *A download message displays.*
3.	Click the **OK** button. *A message displays at the top of the screen indicating your document is ready for download and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
4.	From the browser document option window, click the **Open** button. *The document opens in the selected format.* **Note:** Once the document is open, you can print it by selecting **Print** from the **File** menu.

View Authorizations and Declined (Pending) Transactions

Key Concepts

Pending transactions are transactions that have been approved or declined by Citi but have not yet been posted to your account by the merchant. It is possible to view both authorized and declined transactions. Additional information is provided when a transaction is declined.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and then click the **View Recent** link that displays at the top of the fly-out menu. Recent transaction activity also displays on the **Home** screen. Click the **> More** arrow that displays on the right-side of each transaction row to navigate to the **Statements – Recent** screen. *The Statements – Recent screen displays. An overview of the account displays at the top of the screen. Recent activity displays at the bottom of the screen.* **Note:** If you have more than one card account, click the account number drop-down arrow in the **Statements** header to toggle between accounts.
2.	Scroll to the bottom of the screen and click the **View Authorizations** link. *A list of transactions that have been authorized or declined displays. A message displays if there are no outstanding authorizations.*

View Scheduled and Past Payments (Payment History)

Key Concepts

You can view both pending and previous payment details on the **Scheduled & Past Payments** screen including the following information:

- Amount of payment
- Date of payment
- Bank routing code
- Bank name
- Pay from account
- Account type
- Status of payment

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over **Statements** icon and then click the **Scheduled & Last Payments** link.
	You can also access the **Scheduled & Last Payments** screen from the **Card Details** screen, by clicking the **View History** link from the Statements section.
	The Scheduled & Last Payments screen displays showing pending payments and past payments.
2.	To search for a specific transaction amount, date or pay from account number, type the search criteria in search field that displays in the upper-right corner and click the **Search** button. Click the **Advanced Search** link to access additional search criteria.
	The transactions are filtered by the search criteria entered.

Dispute a Transaction

Key Concepts

You can dispute a transaction when:

- The amount you were billed is incorrect
- There are duplicate charges
- Goods were never received
- Merchandise was defective
- The transaction was paid by other means, usually cash or another card
- The transaction is not recognized

If there has been card misuse/fraud, transactions should not be entered as disputes. A fraud claim should be initiated instead. Examples of misuse/fraud would include transactions that did not meet agency/organization policy or when a card was used without consent.

You can initiate disputes from a billed statement on the **Statements** screen or from the **Statements – Recent Activities** screen which displays unbilled transactions.

In order to meet the processing window of the networks (MasterCard and Visa) and to ensure time for initiation of the dispute as required in GSA SmartPay® disputes must be submitted within 90 calendar days from the transaction date, unless otherwise specified by the Agency/Organization. The CitiManager Site loads posted transactions daily and each transaction is available to review on the CitiManager Mobile Application. Citibank recommends Cardholders enable transaction

alerts and review the transactions that occur daily. Should a transaction need to be disputed, please initiate the dispute as soon as possible.

You can dispute single or multiple transactions at a time. When disputing multiple transactions, the dispute reason must be the same for all the transactions selected. If some of the transactions selected are not eligible to dispute, a message displays the ineligible reference numbers and the eligible disputes will be processed. You can only select a maximum of ten disputes at a time.

You may be required to fax or mail additional information based on the dispute reason selected.

Note: The steps in the procedure describe how to dispute a transaction from the **Statements** screen. The procedure is the same from the **Statements — Recent Activities** screen.

Step-by-Step Instructions

Step	Action
1.	To navigate to billed transactions, from the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and then click the icon for the statement month you wish to view. Use the **Back** and **Forward** (‹ ›) arrows to navigate between years. To navigate to recent activities, from the CitiManager Site side navigation bar, position your mouse over the **Statements** button and then click the **View Recent** link that displays at the top of the fly-out menu. Recent activity also displays on the **Home** screen. Click the **> More** arrow to navigate to the **Statements — Recent** screen. *The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.* **Note:** If you have more than one card account, click the account number drop-down arrow in the **Statements** header to toggle between accounts.
2.	To dispute a singe transaction: a) Click the **ellipsis (...)** link that displays on the right side of the transaction you wish to dispute. *The row expands.* b) Click the **More** link. *The Statement Actions window displays.* c) Select the **Dispute** radio button and click the **Submit** button. *The Statements: Transaction Dispute — Dispute Details screen displays. If the transaction selected does not fulfill the dispute rules, a message displays indicating you should contact Customer Service for assistance.* To dispute multiple transactions with the same dispute reason: a) From the **Dispute** column, click the checkbox for each of the transactions you wish to dispute. **Note:** A maximum of ten transactions can be disputed at a time. b) Click **Dispute** button. The Statements: Transaction Dispute — Dispute Details screen displays. If any of the transactions selected do not fulfill the dispute rules, a message displays listing the ineligible transactions. Click the OK button to process the remaining transactions.

Step	Action
3.	From the **Dispute Reason** section, select the dispute reason from the drop-down list. **Note:** You must select a dispute reason to continue. Only one reason can be selected. Depending on the dispute reason selected, you may be required to provide additional information such as an amount.
4.	Select the verification checkbox to certify the information provided is accurate.
5.	Click the **Continue** button to validate your dispute. *If the validation is successful, the Dispute Transactions – Review screen displays.* **Note:** If the validation fails, the "Please fill out the required fields for the dispute reason selected. If unable to provide detail required, please contact Customer Service to initiate a dispute." message displays.
6.	Review the dispute details, reason code and additional information and click the **Submit** button. *The Dispute Transactions – Confirmation screen displays indicating if the dispute was successfully initiated.*
7.	If the dispute reason you selected indicated a requirement to fax or mail additional dispute information, click the **Download Dispute** form button and follow the instructions on the form. **Note:** To return to the statement, click the **Return to Statement/Unbilled Transaction** link.

View Disputed Transactions

Key Concepts

Once a disputed transaction has been successfully submitted, you can view the following dispute information:

• Transaction Date, Posting Date, Detail, Amount
• Dispute Amount/Currency
• Dispute Status
• Dispute Initiation Date
• Disputed by Name
• Reference Number
• Transactions Details, Disputed Amount, Dispute Initiation Date, Dispute Status

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and click the **View Disputes** link. *The View Disputes screen displays a list of disputed transactions.* **Note:** For inquiries or to cancel a dispute, contact Customer Service for assistance.
2.	To view additional transaction dispute detail, click the **ellipsis (...)** link that displays on the right-side of the row you wish to expand.

Go Paperless

Key Concepts

You can view and download your statements online at your convenience, including details for any purchase. Federal Government Cardholders are automatically opted out of paper statements, therefore the **Go Paperless** link will not display.

The CitiManager Site allows you to opt in to receive a paper statement or other paper notices through the mail. You will begin receiving statements the next billing cycle. Paper statements are the default setting only when authorized by the agency/organization.

You must sign up to receive an e-mail alert that will notify you when a new statement is available. An e-mail is sent to the account e-mail address when the statement is ready to be viewed in the CitiManager Site. You can set your alerts by positioning your mouse over the **Alerts** button from the side navigation bar and clicking the **Alerts** link. Refer to the **Set E-mail and Mobile Alerts** topic in this guide for additional information.

To receive your electronic statement again, use the **Go Paperless** link to cancel your request for paper statements and only receive online statements.

Step-by-Step Instructions

To Receive Online Statements

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and click the **Go Paperless** link. *The Go Paperless screen displays.*
2.	To stop receiving paper statements and other account notices, select the checkbox.
3.	Click the **+ Sign Click Here To Read Terms and Conditions** link and review the terms and conditions associated with opting out of paper statements and then click the **I Agree** button. *A message displays asking you confirm the e-mail address on the account.*
4.	Click the **Yes** button to confirm your e-mail address. If you wish to change the e-mail address, click the **No** button and follow the instructions for navigating to the **Alerts** screen to update your e-mail address. Click the **OK** button to close the message. *The Online Payment Options message displays indicating you can continue to set up online payment options.*
5.	Click the **Continue to Make Payment** button to navigate to the **Make a Payment** screen and set up your payment options. Refer to the **Make a Payment** topic in this user guide for additional information. *A confirmation message displays at the top of the screen.*

Step-by-Step Instructions

To Receive Paper Statements

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** icon and click the **Go Paperless** link. *The Go Paperless screen displays.*
2.	De-select the checkbox.
3.	Click the **I Agree** button. *A confirmation message displays at the top of the screen.*

Resources

View Message Board

Key Concepts

Citi periodically posts system update and maintenance information. This information is posted to the Message Board.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** icon and then click the **Messages** link. *The Messages screen displays who sent the message, the subject, when it was approved and type of message.*
2.	To view additional information about a message, click the link from the **Subject** column. *Any additional information displays.*
3.	To return to the list of messages, click the **Back** button.

Search for a Non-cardholder (Program Administrator)

Key Concepts

You can search for Non-cardholders (Program Administrator) and view the following information:

• Hierarchy Name
• Role
• Full Name
• User Profile E-mail Address

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** icon and then click the **Search** link. *The Search Result screen displays.*
2.	To perform a basic search, type the name or username of the Non-cardholder and click the **Search** icon, OR To perform an advanced search, click the **Advanced Search** link. To search by **Role** and **Hierarchy Name**, click the **More Options** link. Enter your search criteria and click the **Search** button. *The search results display based on the search criteria entered.*

View Frequently Asked Questions

Key Concepts

The CitiManager Site Frequently Asked Questions (FAQ) documents contain answers to some of the most commonly asked questions. It includes information about Cardholder registration, passwords, security questions, alerts and quick tips.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** icon and then click the **FAQs** link. *The View FAQ screen displays.*
2.	Click the link for the document you wish to view. *A message displays indicating the downloaded file may be cached to your computer.*
3.	Click the **OK** button to close the message. *The browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
4.	Click either the **Save** or **Open** option. *The selected document opens in Portable Document Format (PDF) or the Save options window opens.*

Access Links & Help

Key Concepts

You can view additional reference material such as user guides and access program support sites from the **Links/Help** screen.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** icon and then click the **Links & Help** link. *The Links/Help screen displays.*
2.	Click the link for the resource you wish to access. *A message displays indicating you will be opening an external link.*
3.	Click the **OK** button. *Depending on the type of resource selected, either the website will open or a message displays indicating the selected document will be cached to your computer's hard drive.* **Note:** When you click on a link for an external site, a new browser opens and you will be directed to the selected site. You will still be logged into the CitiManager Site.
4.	If a document was selected, click the **OK** button to close the message. *The browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
5.	Click either the **Save** or **Open** option. *The selected document opens in Portable Document Format (PDF) or the Save options window opens.*

Web Tools

Access Web Tools

Key Concepts

If you have been granted access to Transaction Management, you can access them from **Web Tools**.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Web Tools** icon and then click the link for the tool you wish to open. *Depending on your access, a window may open displaying a list of instances available to you.*
2.	Click the desired link for the instance you wish to open. *The tool opens in a new window.*

Alerts

Manage Alert Subscriptions

Key Concepts

As a Cardholder, you can set alerts so notifications are automatically sent via e-mail and/or to your mobile device when certain selected activity occurs on your account, for example, when statements are available and when payments are received.

There are two types of alerts to which you can subscribe:

- **Transactional Alerts** — An alert is sent when a defined condition or threshold is met, for example an alert is triggered when a payment is received or when a defined percentage of your credit limit is met.
- **Account Alerts** — An alert is sent when there are status changes to your account, for example when your address is changed or when your statement is available.

It is possible to enter up to five e-mail addresses and customize when you will receive your SMS alerts based on:

- Time zone
- Time of day
- Days of week

Once you have subscribed to mobile alerts in the CitiManager Site, you will receive a confirmation text message on your mobile device with a four-digit PIN. The four-digit PIN must be entered on the PIN confirmation number screen in the CitiManager Site. Once the PIN has been entered, the CitiManager Site will send another text to your mobile device confirming activation. The confirmation text message is sent any time you change or enter a new mobile phone number.

On-Demand Mobile Alerts

In addition, once you have registered your mobile device number in the CitiManager Site, you have full access to on-demand mobile alerts. On-demand mobile alerts allow you to request and receive immediate information such as account balances, payment amounts and due dates. Refer to the **Manage On-demand Mobile Alerts** topic in this user guide for additional information.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Alerts** icon and then click the **Alerts Subscription** link. *The Alerts Subscription screen displays.*
2.	To enter/edit the e-mail address(es) where you want alerts sent, click the **Email Addresses — Edit** link and complete the following steps when the **Email Address Preferences** window opens: a) Type and confirm up to five e-mail addresses. b) Click the **Save** button.

Step	Action
3.	To edit your mobile number, your mobile carrier, and your notification preferences, click the **Mobile Phone Number – Edit** link and complete the following steps when the **Mobile Number Preferences** screen opens: a) In the **Country Code** and **Mobile Number** field, type a valid mobile phone number where you wish alerts to be sent. **Note:** Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile. b) Click in the **Supported Carriers** field and select your mobile carrier. **Note:** Canadian users will receive a confirmation text message to enable the subscription due to regulations in Canada. c) Click in the **Preferred Time Zone** field and select your preferred time zone. d) Click in the **From** and **To** fields and select the time-frame in which you would like to receive alerts. e) From the list of weekdays, select the days you would like to receive alerts. f) Click the **Save** button.
4.	To subscribe to alerts, select the **Email Alerts** and/or **SMS (Mobile Alerts)** checkbox(es) for each of the alerts you wish to receive. To unsubscribe to alerts, deselect the **Email Alerts** and/or **SMS (Mobile Alerts)** checkbox(es) for the alerts you no longer wish to receive. **Note:** Some alerts may be greyed out and unavailable. Available alerts are set by your Program Administrator. Alerts that are selected and greyed out are mandatory. For more information about each alert, click the information icon next to the alert name. Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the **Available Credit Remaining %** alert, you must select the desired **Available Credit Remaining %.** When the selected percent of remaining credit level is met, you will receive an alert.
5.	When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox. **Note:** If you do not agree to the terms and conditions, you will not be able to receive alerts.
6.	Click the **Save** button. *The alerts settings are saved and a confirmation message displays at the top of the screen. The PIN confirmation number screen displays if you elected to receive alerts on your mobile device for the first time or you changed your mobile phone number.* **Note:** If you elected to receive alerts on your mobile device, you will receive a text message with a PIN. On the CitiManager Site **PIN confirmation number** screen, type the PIN number received on your mobile device in the **PIN confirmation number** field and click the **Confirm** button.

View Alert Audit Log

Key Concepts

Use the Alert Audit Log to view the following information about a change made to an alert:

- Date/Time of Change
- Changed By
- Updated Alert
- E-mail/Mobile
- Previous Status
- Current Status

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Alerts** icon and then click the **Audit Log** link. *The Alerts Audit log screen displays*.
2.	View the information displayed on the audit log to determine which alerts were updated, when they were changed, by whom and the current status of the alert.

Manage On-Demand Mobile Alerts

Key Concepts

In order to receive alerts on your mobile device, you must subscribe to the alerts in the CitiManager Site first. Refer to the **Manage Alert Subscriptions** topic in this user guide for additional information.

Once you have registered your mobile device number in the CitiManager Site, you have full access to on-demand mobile alerts. On-demand mobile alerts allow you to request and receive immediate information such as account balances, payment amounts and due dates.

For additional information about on-demand mobile alerts, from the side navigation bar, position your mouse over the **Alerts** button and then click the **On-Demand Mobile Alerts** link.

If you need to stop mobile alerts, reset your CitiManager Site password, or need additional support, choose one of the following options:

Action	Command
To suspend mobile alerts from your mobile device	Text **STOP** to **GOCITI** (462484).
To reset your CitiManager Site password	Text **RESETXXXX to GOCITI** (462484), where XXXX represents the last four digits of your account number (e.g., RESET1234). **Note:** The reset password sent to you is valid for 48 hours. You are required to change the reset password when you log into the CitiManager Site.
To receive mobile alert help on your mobile device	Text **HELP** to **GOCITI** (462484).
To view the Citi Mobile Alerts Help website which provides a list of alerts available by region	Navigate to: http://home.cards.citidirect.com/SMSHelp **Note:** This link is case sensitive and SMSH is capitalized.

To receive on-demand alerts from your registered mobile device, text the desired command (e.g., HIST) to **GOCITI** (462484). A list of available commands is provided in the table below.

For some on-demand mobile alerts you are required to enter the last four digits of your account number after the command. For example, to receive account balance information, text BAL1234 to **GOCITI** (462484) where 1234 represents the last four digits of the account number.

Command	Description	Country Availability
BAL	To receive current balance, last payment, payment amount due, and payment due date **Note:** The last four digits of the account number are required. For example, text BALXXXX, where XXXX represents the last four digits of the account number.	Canada United States United Kingdom United Arab Emirates
COM	To receive information regarding valid on demand commands	Canada United States United Kingdom United Arab Emirates
CUST	To receive Citi Commercial Cards Customer Service numbers	Canada United States United Kingdom United Arab Emirates
HELP	To receive alerts help	Canada United States United Kingdom United Arab Emirates
HIST	To receive details on the three most recent posted transactions **Note:** The last four digits of the account number are required. For example, text HISTXXXX, where XXXX represents the last four digits of the account number.	Canada United States United Kingdom United Arab Emirates
LIMIT	To receive the available spend remaining on your account **Note:** The last four digits of the account number are required. For example, text LIMITXXXX, where XXXX represents the last four digits of the account number.	United Kingdom United Arab Emirates
RESET	To request password reset for the CitiManager site **Note:** The last four digits of the account number are required. For example, text RESETXXXX, where XXXX represents the last four digits of the account number.	Canada United States United Kingdom United Arab Emirates
STOP	To stop alerts from being sent to your registered mobile device	Canada United States United Kingdom United Arab Emirates