

CitiManager[®] Site Non-cardholder

GSA SmartPay[®]

Quick Start Guide

December 2021



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Overview

Document Scope

This CitiManager® Site User Guide provides detailed step-by-step instructions for some of the most commonly used CitiManager Site functions available to Non-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 company level so there may be variances in what is described in this User Guide based on your company'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.

What Is CitiManager?

The CitiManager Site is a powerful online tool that allows Non-cardholders to efficiently manage their card programs. Depending on your company's setup, you will be able to:

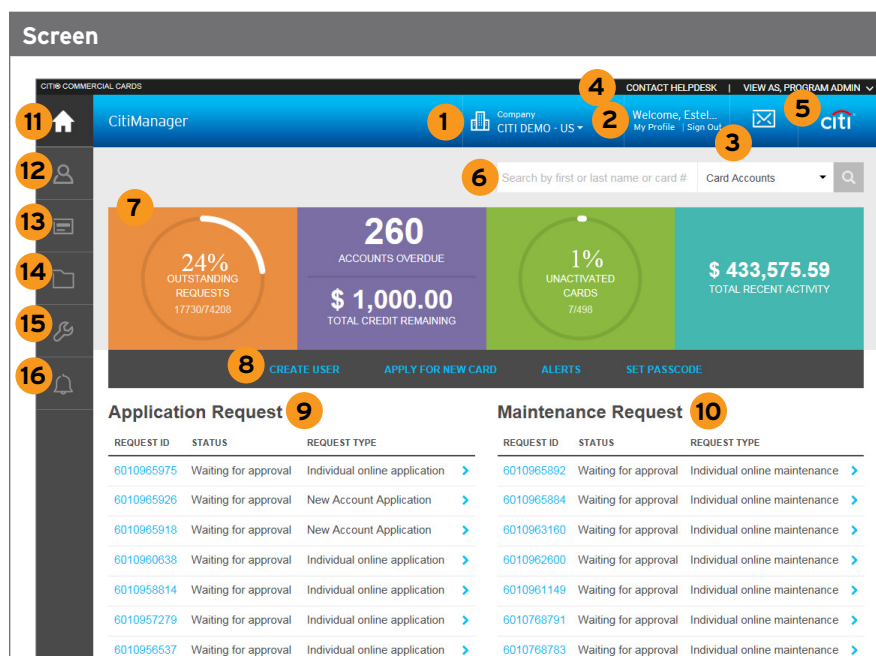
- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations
- Review and approve/reject application and maintenance requests
- Perform account maintenance
- Create users
- Activate and deactivate users
- Assign applications and companies
- Set passcodes
- Manage alerts
- Manage your profile

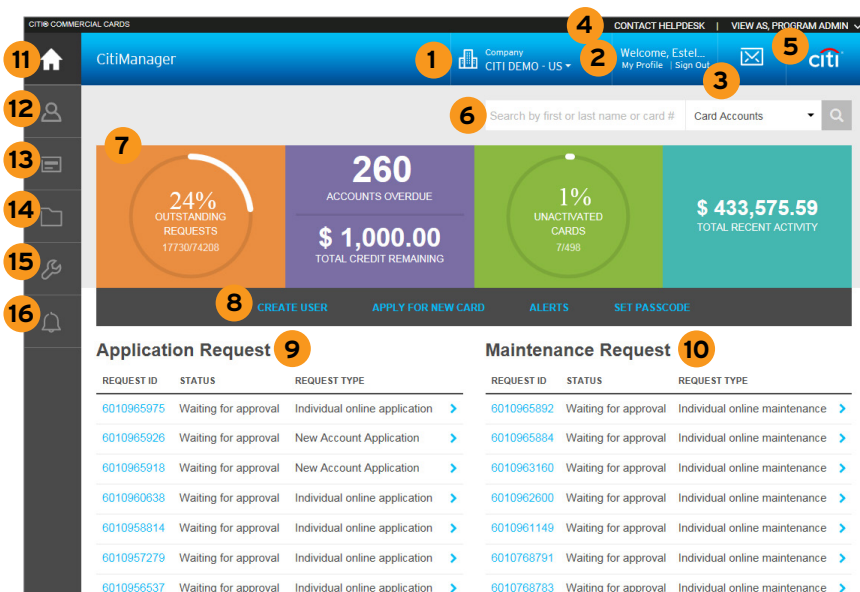
Basic Navigation

Description

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 program – including outstanding requests, accounts overdue, total credit remaining, number of un-activated cards and recent activity.

You can also view a list of application and maintenance requests. Use the navigation options from the header and the side navigation bar as well as quick links to navigate to additional program information and preferences.

Screen	Step/Action
 <p>CitiManager Home Screen</p>	<p>Header</p> <ol style="list-style-type: none"> 1. View your company. If you have access to more than one, you may select another company by selecting it from the drop-down list. 2. Access My Profile functions or sign out of the CitiManager Site. 3. View the Message Board. 4. Contact the Help Desk for assistance. 5. If you have both Cardholder and Non-cardholder access to the CitiManager Site you can toggle between both using the drop-down list. <p>Screen Components</p> <ol style="list-style-type: none"> 6. Complete a search by typing a name or card account number and then select an action from the drop-down list such as Card Accounts or View Requests. 7. View high-level account metrics such as outstanding requests, accounts overdue, total credit remaining, percent un-activated cards and total recent activity. 8. Use the quick links to create a user, apply for new card, set your personal alerts and set passcode. 9. View a list of pending Application Requests that are waiting for your review. 10. View a list of pending Maintenance Requests that are waiting for your review.

Screen	Step/Action
 <p>CitiManager Home Screen</p>	<p>Side Navigation Bar</p> <ol style="list-style-type: none"> Click the Home icon to return to the Home screen. Click the Manage Users icon to view card account details, view recent and billed statements, perform account maintenance, view requests, view refund history, perform a user search, print multiple statements, view disputes, view hierarchy, create a user and assign/unassign applications. Click the Manage Card Program icon to complete a new account applications run reports and set passcodes. Click the Resources icon to view messages, access FAQs and Links & Help. Click the Tools icon to navigate to CitiManager – Reporting, CitiManager – Transaction Management or CitiManager – Expense Management if you are entitled and also the Learning Center. Click the Alerts icon to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.

Self Register as a Non-cardholder

Key Concepts

As a Non-cardholder it's possible to self-register for the CitiManager Site so you can manage your card program.

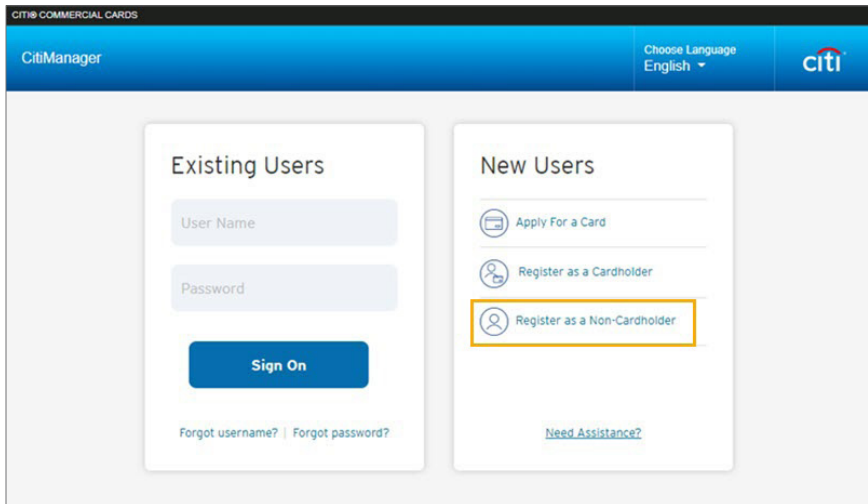
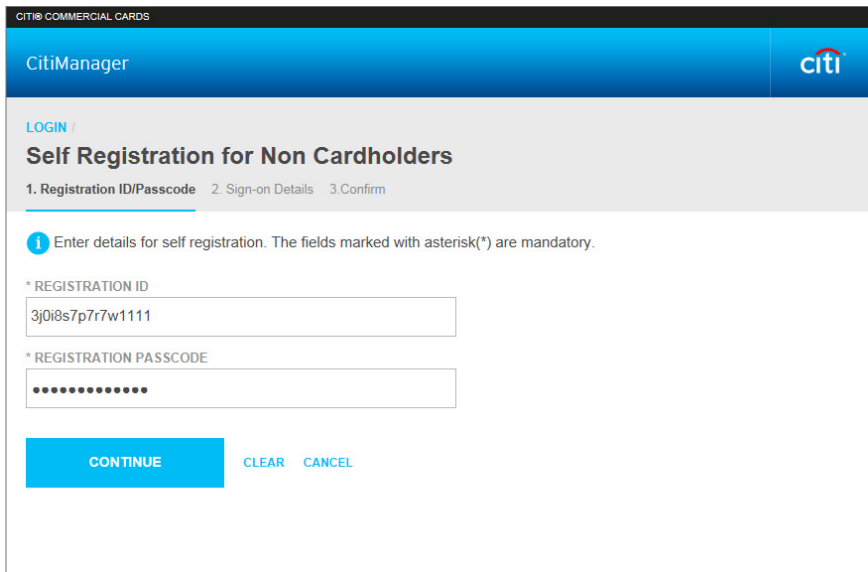
In order to self-register, a Registration ID and Registration Passcode are required.

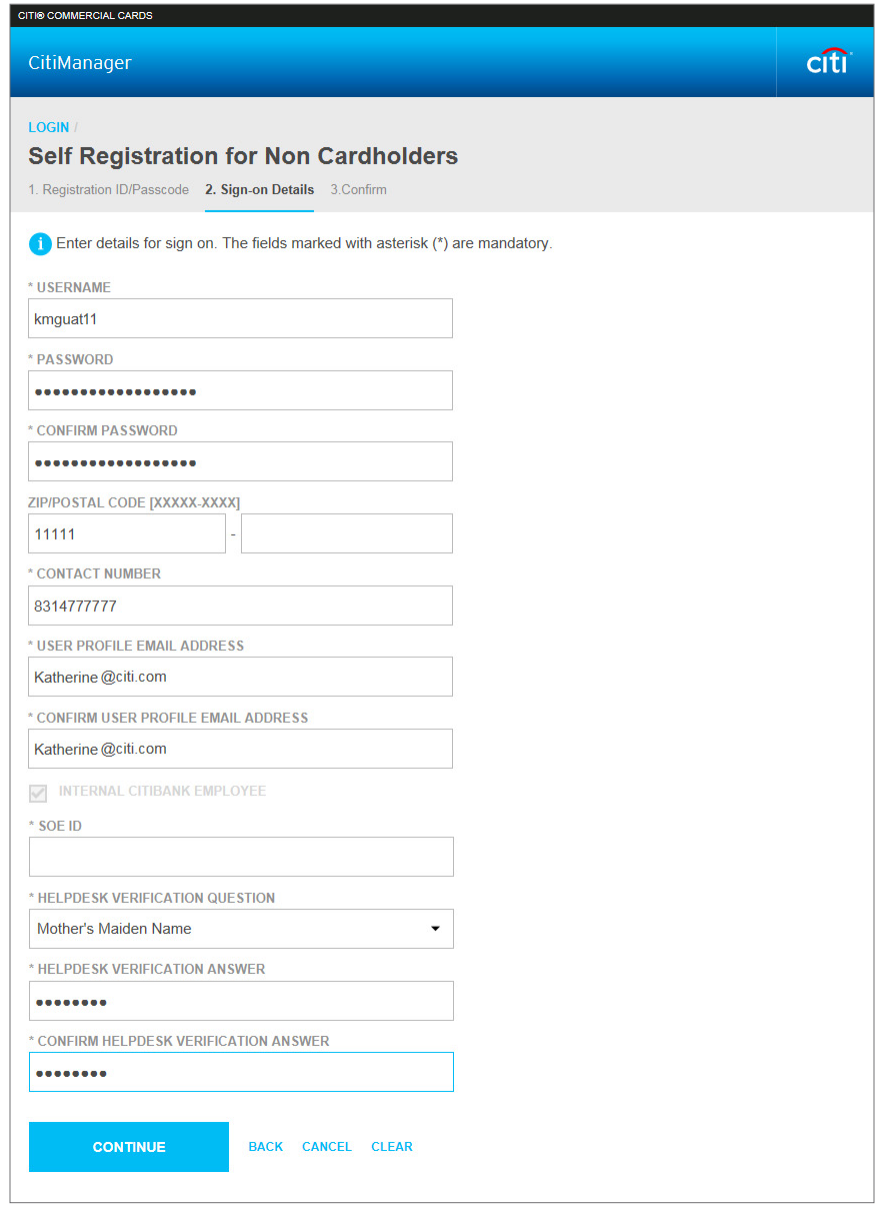
Citi will send one e-mail with your Registration ID and another with your Registration Passcode. These e-mails are required during the registration process.

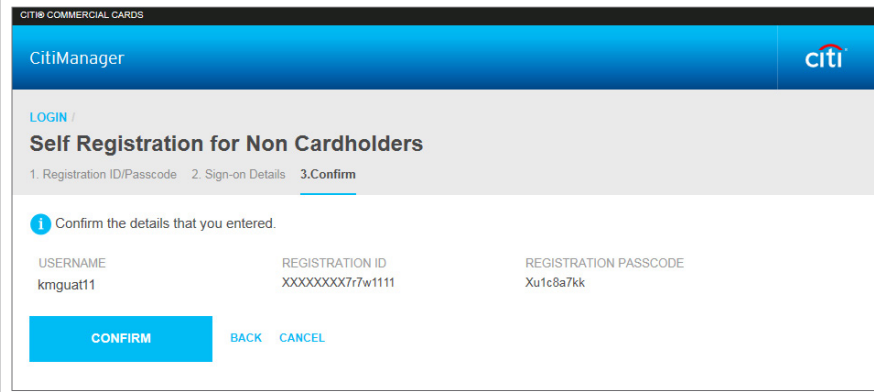
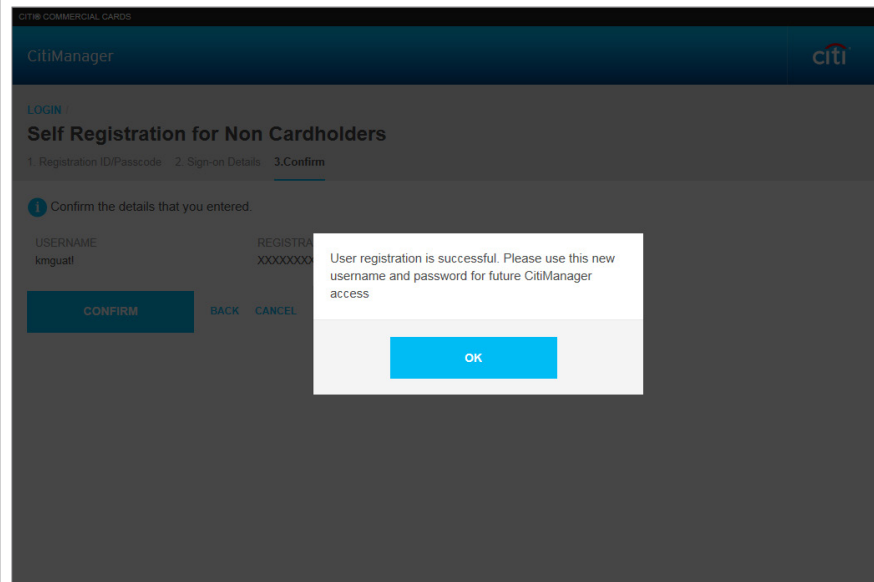
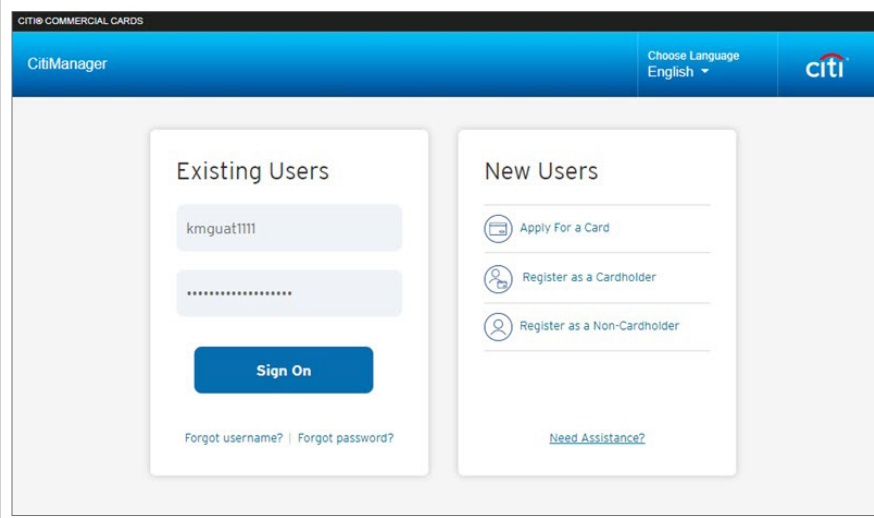
Once you receive your registration details, you must register within 60 days or your details will expire. You will be reminded every 15 days until your registration is complete.

The Registration ID and Passcode can be reset by your administrator.

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Login Screen. It has a blue header with 'CitiManager' and a 'Choose Language English' dropdown. Below the header, there are two main sections: 'Existing Users' and 'New Users'. The 'Existing Users' section has fields for 'User Name' and 'Password', a 'Sign On' button, and links for 'Forgot username?' and 'Forgot password?'. The 'New Users' section has three options: 'Apply For a Card', 'Register as a Cardholder', and 'Register as a Non-Cardholder'. The 'Register as a Non-Cardholder' option is highlighted with a yellow box. There is also a 'Need Assistance?' link at the bottom of the 'New Users' section.</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. From the New Users section click the Register as a Non-Cardholder link. <i>The Registration ID/Passcode screen displays.</i>
 <p>The screenshot shows the Registration ID/Passcode Screen. It has a blue header with 'CitiManager'. Below the header, there is a 'LOGIN /' section followed by 'Self Registration for Non Cardholders'. Below this, there are three steps: '1. Registration ID/Passcode', '2. Sign-on Details', and '3. Confirm'. The first step is active. Below the steps, there is a message: 'Enter details for self registration. The fields marked with asterisk(*) are mandatory.' There are two input fields: '* REGISTRATION ID' with the value '3j0i8s7p7r7w1111' and '* REGISTRATION PASSCODE' with masked characters. At the bottom, there are three buttons: 'CONTINUE' (blue), 'CLEAR' (light blue), and 'CANCEL' (light blue).</p>	<ol style="list-style-type: none"> 3. In the Registration ID field, type the Registration ID supplied in the e-mail sent from the CitiManager Site. 4. In the Registration Passcode field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site. 5. Click the Continue button. <i>The Sign-on Details screen displays.</i>

Screen	Step/Action
	<ol style="list-style-type: none"> 6. In the Username field, type your desired username. Note: The username requirements display in a window as you type your username. A checkmark displays when the requirement is fulfilled. 7. In the Password field, type and confirm a password that meets the requirements. Note: The password requirements display in a window as you type your password. A checkmark displays when the requirement is fulfilled. 8. In the Confirm Password field, re-type the password. 9. Verify the information in the Zip/Postal Code, Contact Number and User Profile Email Address fields and update if necessary. 10. From the Helpdesk Verification Question drop-down list, select a question that will be used to verify your identity should you need to contact the helpdesk. 11. From the Helpdesk Verification Answer field, type an answer to the Helpdesk verification question you selected. 12. When you are finished, click the Continue button. <i>The Confirm screen displays.</i>
Sign-on Details Screen	

Screen	Step/Action
 <p>The screenshot shows the 'Confirm' step of the self-registration process. It displays the entered details: USERNAME 'kmguat11', REGISTRATION ID 'XXXXXXXX7r7w1111', and REGISTRATION PASSCODE 'Xu1c8a7kk'. There are buttons for 'CONFIRM', 'BACK', and 'CANCEL'.</p>	<p>13. Review the details and click the Confirm button.</p> <p><i>A confirmation message displays indicating registration was successful and a confirmation e-mail is sent to the address entered during the registration process.</i></p>
 <p>The screenshot shows a confirmation message overlaying the registration screen. The message states: 'User registration is successful. Please use this new username and password for future CitiManager access'. There is an 'OK' button to dismiss the message.</p>	<p>14. Click the OK button.</p> <p><i>The CitiManager Site Login screen displays. When you log in for the first time, you will be prompted to select and answer three challenge questions.</i></p> <p>Note: As an extra security measure, each time you log in, you will be asked to answer one of the challenge questions.</p>
 <p>The screenshot shows the CitiManager Site Login Screen. It has two main sections: 'Existing Users' with fields for username and password, and a 'Sign On' button; and 'New Users' with links to 'Apply For a Card', 'Register as a Cardholder', and 'Register as a Non-Cardholder'. There are also links for 'Forgot username?', 'Forgot password?', and 'Need Assistance?'.</p>	<p>15. Type your username and password and click the Sign On button.</p> <p><i>The Reset Challenge Questions and Answers screen displays.</i></p>



Screen	Step/Action
<div><div>CITICOMMERCIAL CARDS</div><div>CitiManager<div>Sign Out</div><div>citi</div></div><div>LOGIN /</div><div>Reset Challenge Questions and Answers</div><div><div><div>Select challenge questions and set answers.</div></div><div><div>CHALLENGE QUESTION 1</div><div>What is your favorite car?</div><div>* ANSWER 1</div><div>●●●</div><div>* CONFIRM ANSWER 1</div><div>●●●</div><div>CHALLENGE QUESTION 2</div><div>What is your favorite food or drink?</div><div>* ANSWER 2</div><div>●●●●●</div><div>* CONFIRM ANSWER 2</div><div>●●●●●</div><div>CHALLENGE QUESTION 3</div><div>Who is your favorite singer?</div><div>* ANSWER 3</div><div>●●●●●●</div><div>* CONFIRM ANSWER 3</div><div>●●●●●●</div><div><div>SAVE</div><div>CLEAR</div><div>CANCEL</div></div></div></div></div> <div><div>16. Select and answer three challenge questions.</div><div>17. Click the Save button.</div><div><i>The CitiManager Site Home screen displays.</i></div></div>	
Reset Challenge Questions and Answers Screen	

Log In to the CitiManager Site

Key Concepts

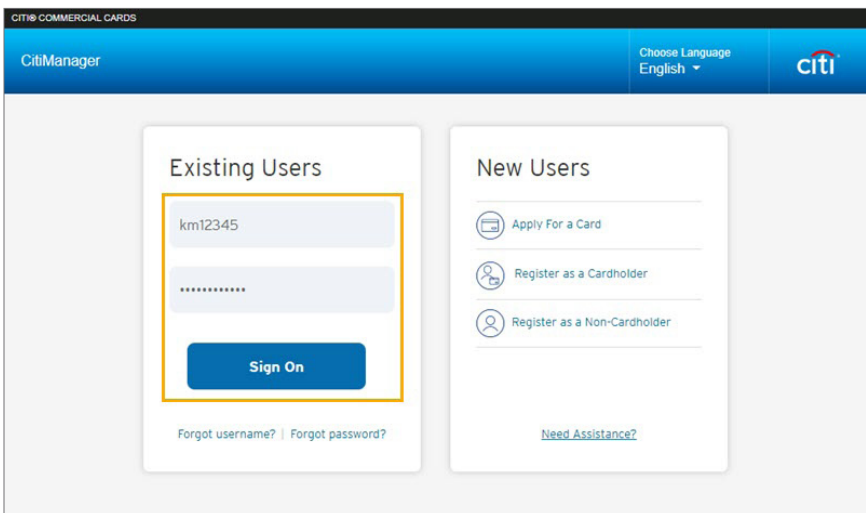
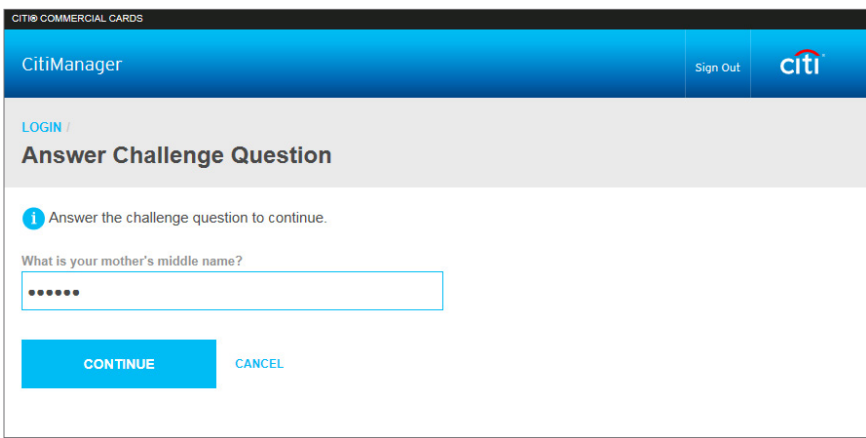
In order to access your account information in the CitiManager Site, you must log in to the application using a valid username and password and then answer a challenge question.

You can only have one session of CitiManager open at a time.

As an additional layer of security, you may be required to enter a one-time passcode (OTP) during the log in process. The CitiManager Site will assess the risk based on your previous log in history. This additional step of authentication will not be necessary for every login.

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

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Login screen. It features a blue header with 'CitiManager' and a 'Choose Language English' dropdown. The main content area has two columns: 'Existing Users' and 'New Users'. The 'Existing Users' column has a text input field with 'km12345', a password field with dots, and a 'Sign On' button. Below these are links for 'Forgot username?' and 'Forgot password?'. The 'New Users' column has three links: 'Apply For a Card', 'Register as a Cardholder', and 'Register as a Non-Cardholder'. At the bottom of this column is a link for 'Need Assistance?'.</p> <p>CitiManager Site Login Screen</p>	<ol style="list-style-type: none"> Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> In the Username field, type your username. In the Password field, type your password. Click the Sign On button. <i>The Challenge Questions screen displays.</i> <p>Note: If the system determines it necessary, the One-time Passcode receipt option screen displays. Select how you would like to receive your one-time passcode (The text option is recommended provided your mobile phone number is current in your profile) and click the Continue button. When the eight-digit code is received, enter it on the One-time Passcode screen in the CitiManager Site and click the Continue button. The one-time passcode expires after five minutes (300 seconds).</p>
 <p>The screenshot shows the Challenge Questions screen. It has a blue header with 'CitiManager' and a 'Sign Out' button. The main content area has a 'LOGIN /' link and a heading 'Answer Challenge Question'. Below this is an information icon and the text 'Answer the challenge question to continue.' A text input field asks 'What is your mother's middle name?' with dots. At the bottom are 'CONTINUE' and 'CANCEL' buttons.</p> <p>Challenge Questions Screen</p>	<ol style="list-style-type: none"> Answer the challenge question and click the Continue button. <i>The CitiManager Site Home screen displays.</i>

View Card Account Details

Key Concepts

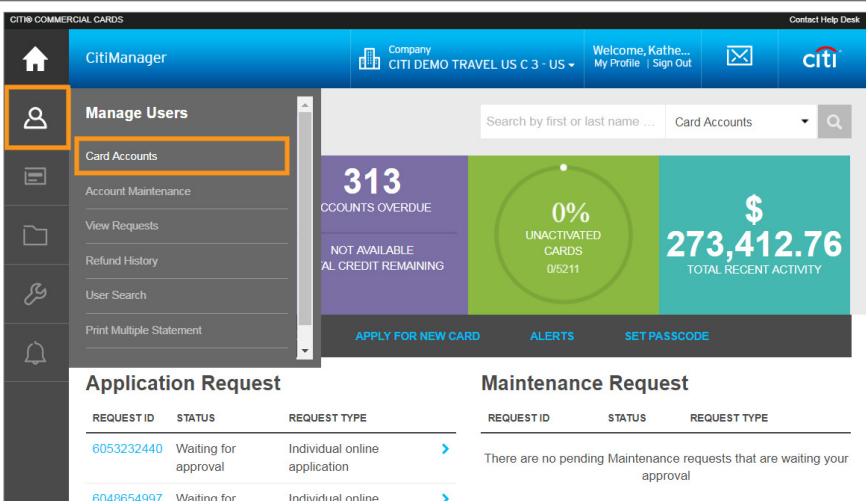
You can search for Cardholder accounts that reside in your assigned hierarchies. Once the search is complete, you may view:

- Balance, credit limit and payment information
- Links to recent transactions and previous statements
- Aging of balance information
- Card contact information

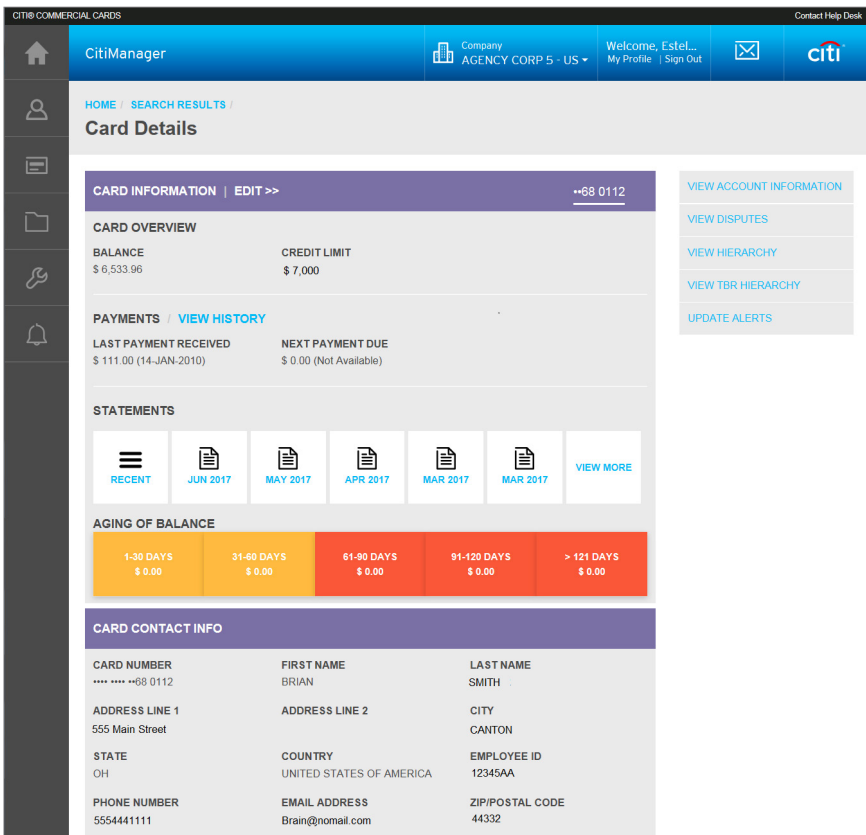
Non-cardholders can only access accounts within their span of control.

The **Card Details** screen is also a launching point if you want to view recent transactions, billed statements/transactions or perform other actions such as viewing disputes if they were submitted through the CitiManager Site, viewing the account hierarchy or setting alerts for the Cardholder.

Step-By-Step Instructions

Screen	Step/Action
 <p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link. <i>The Search for Cards screen displays.</i>

Screen	Step/Action															
<div><div><div>CITI COMMERCIAL CARDS</div><div>Contact Help Desk</div></div><div><div><div>HOME</div><div>Search</div><div>Search by first or last na... Card Accounts</div><div>BASIC SEARCH >></div></div><div><div>SEARCH FOR CARDS</div><div>Card Accounts</div><div><div>CARD FIRST NAME</div><div>CARD LAST NAME</div><div>CARD NUMBER</div></div><div><div>MORE OPTIONS</div><div>SEARCH</div><div>RESET</div></div></div><div><div>VIEWING 1-20 OF 144</div><div>< 1 2 3 4 5 ></div></div><div><table><thead><tr><th>CARD NUMBER</th><th>USERNAME</th><th>CARD NAME</th><th>STATUS</th><th>BILL TYPE</th></tr></thead><tbody><tr><td>.....*03 1754</td><td></td><td>Justin A KBussard</td><td>Activated</td><td>Individually billed card</td></tr><tr><td>.....*03 4645</td><td></td><td>Sheryl A Samuel</td><td>Activated</td><td>Individually billed card</td></tr></tbody></table></div></div></div>	CARD NUMBER	USERNAME	CARD NAME	STATUS	BILL TYPE*03 1754		Justin A KBussard	Activated	Individually billed card*03 4645		Sheryl A Samuel	Activated	Individually billed card	<div><div>2.</div><div><p>To perform a search, type the desired search criteria in the Card First Name, Card Last Name or Card Number fields and click the Search button.</p><p>Note: To perform an advanced search using the Bill Type, Country, Username, Hierarchy Name, Hierarchy Unit or Name Line 1 fields, click the More Options button. If you search by Hierarchy Unit, you must enter the full hierarchy number with no spaces or dashes.</p><p>To search for users at a specific hierarchy level, click the Lookup Hierarchy link. If necessary, click the (+) plus sign icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the Select button.</p><p><i>The search results display at the bottom of the screen.</i></p><p>Note: To sort the results by the Card Number, Username, Card Name, Status or Bill Type columns, click the column header name.</p></div></div> <div><div>3.</div><div><p>From the Card Number column, click the link for the card account you wish to view.</p><p><i>The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements, aging of balance information and the card contact details.</i></p><p>Note: To navigate back to the Search Results screen, click the Back button that displays at the bottom of the screen or the link in the breadcrumbs displayed at the top of the screen.</p></div></div>
CARD NUMBER	USERNAME	CARD NAME	STATUS	BILL TYPE												
.....*03 1754		Justin A KBussard	Activated	Individually billed card												
.....*03 4645		Sheryl A Samuel	Activated	Individually billed card												

Screen	Step/Action
 <p>Card Details Screen</p>	<p>4. From the Card Details screen you can also navigate to the following actions on the account:</p> <ul style="list-style-type: none"> Depending on your company's setup you can View Account Information, View Disputes, View Hierarchy, View TBR Hierarchy and Update Alerts for the account by clicking the desired link that displays on the right-side of the screen. To view recent transactions or previously billed transactions for the selected card account, click the Recent icon or the desired statement date icon.

View Statements and Recent Transactions

Key Concepts

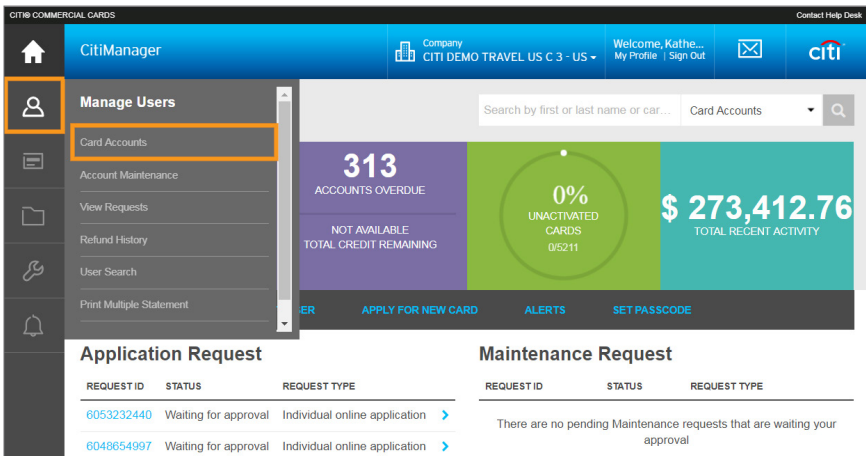
You can view a Cardholder's current statement or a statement from previous months. Transaction data will be retained for the previous 72 statements. You can also view recent transactions for a Cardholder that have posted to the account but have not yet been billed to a statement.

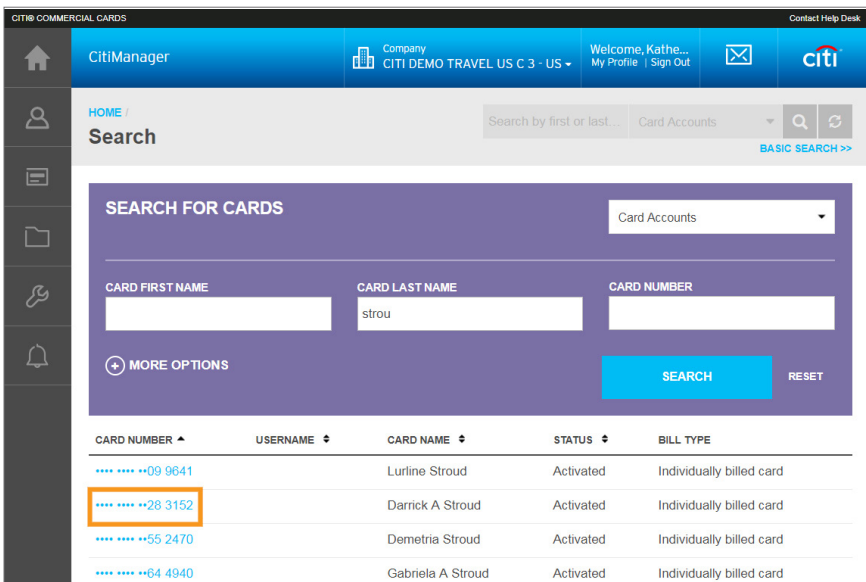
The **Statements** screen displays a snapshot of balances, payments posted and due dates. A list of transactions also displays and at the bottom the screen and you can expand each to view additional detail that may have been sent to Citi from a merchant. Transaction detail will include the original currency amount, currency exchange rate and the conversion amount that was posted and may include items such as airline name, ticket and flight number.

Additionally, you can initiate a dispute if the transaction meets the requirements.

You can download and print transactions for individually or centrally billed accounts. If you wish to print 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

Screen	Step/Action
 <p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link. <p><i>The Search for Cards screen displays.</i></p>

Screen	Step/Action
 <p>Search Screen</p>	<p>2. To perform a search, type the desired search criteria in the Card First Name, Card Last Name or Card Number fields and click the Search button.</p> <p>Note: To perform an advanced search using the Bill Type, Country, Username, Hierarchy Name, Hierarchy Unit or Name Line 1 fields, click the More Options button. If you search by Hierarchy Unit, you must enter the full hierarchy number with no spaces or dashes.</p> <p>To search for users at a specific hierarchy level, click the Lookup Hierarchy link. If necessary, click the (+) plus sign icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the Select button.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>Note: To sort the results by the Card Number, Username, Card Name, Status or Bill Type columns, click the column header name.</p> <p>3. From the Card Number column, click the link for the card account you wish to view.</p> <p><i>The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements, aging of balance information and the card contact details.</i></p> <p>Note: To navigate back to the Search Results screen, click the Back button that displays at the bottom of the screen or the link in the breadcrumbs displayed at the top of the screen.</p>

Screen

The screenshot displays the CitiManager 'Card Details' page. At the top, a blue header bar contains the CitiManager logo, company information (CITI DEMO TRAVEL US C 3 - US), a welcome message for Kathe..., and navigation links for 'My Profile' and 'Sign Out'. A 'Contact Help Desk' link is in the top right. Below the header, a grey navigation bar shows 'HOME / SEARCH RESULTS / Card Details'. The main content area is divided into several sections: 'CARD INFORMATION' with an 'EDIT >>' link and card number '28 3152'; 'CARD OVERVIEW' showing 'BALANCE \$ 142.44' and 'CREDIT LIMIT \$ 3,500.00'; 'PAYMENTS | VIEW HISTORY' showing 'LAST PAYMENT RECEIVED \$ 47.60 (07/09/2010)' and 'NEXT PAYMENT DUE \$ 71.38 (08/14/2010)'; 'STATEMENTS' which is highlighted with an orange box and contains three icons: 'RECENT', 'JUL 2010', and 'JUN 2010'; 'AGING OF BALANCE' with a table showing zero balances across five time periods; and 'CARD CONTACT INFO' at the bottom with fields for card number, first/last name, address, state, country, employee ID, phone/mobile numbers, fax, email, and zip/postal code.

Card Details Screen

Step/Action

4. From the **Statements** section, click the icon for the statement date you wish to view or click the **Recent** icon to view transactions that have posted to an account but have not yet been billed to a statement.

The Statements screen displays. A snapshot of the credit limits, balances and payments display at the top of the screen. Recent or billed transactions display at the bottom of the screen.

Card Details Screen

Perform Account Maintenance

Key Concepts

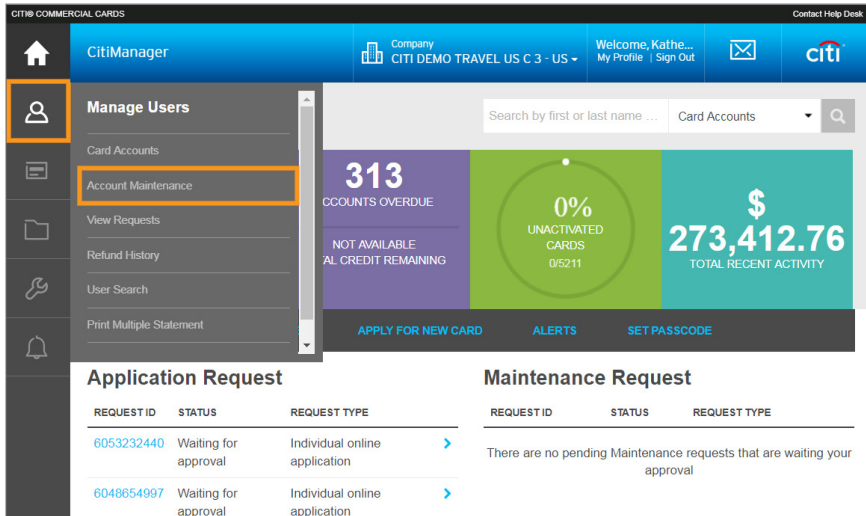
To perform account maintenance, the Cardholder Maintenance form must be completed and submitted to Citi. Account Maintenance allows the Non-cardholder to update Cardholder account information such as card address, discretionary codes, and spending controls and temporary spending controls.

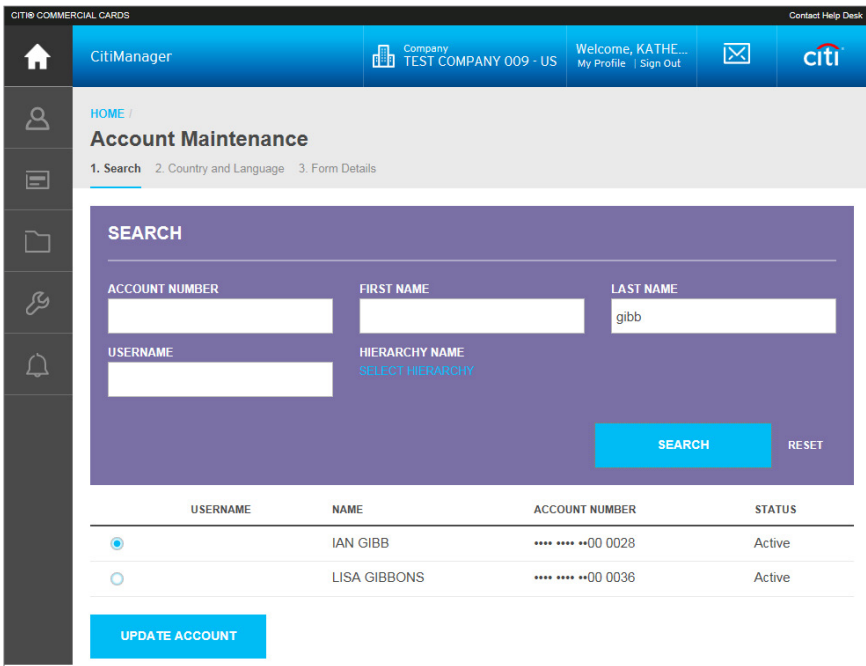
For individuality billed accounts, a Non-cardholder is not permitted to perform account maintenance on their own account.

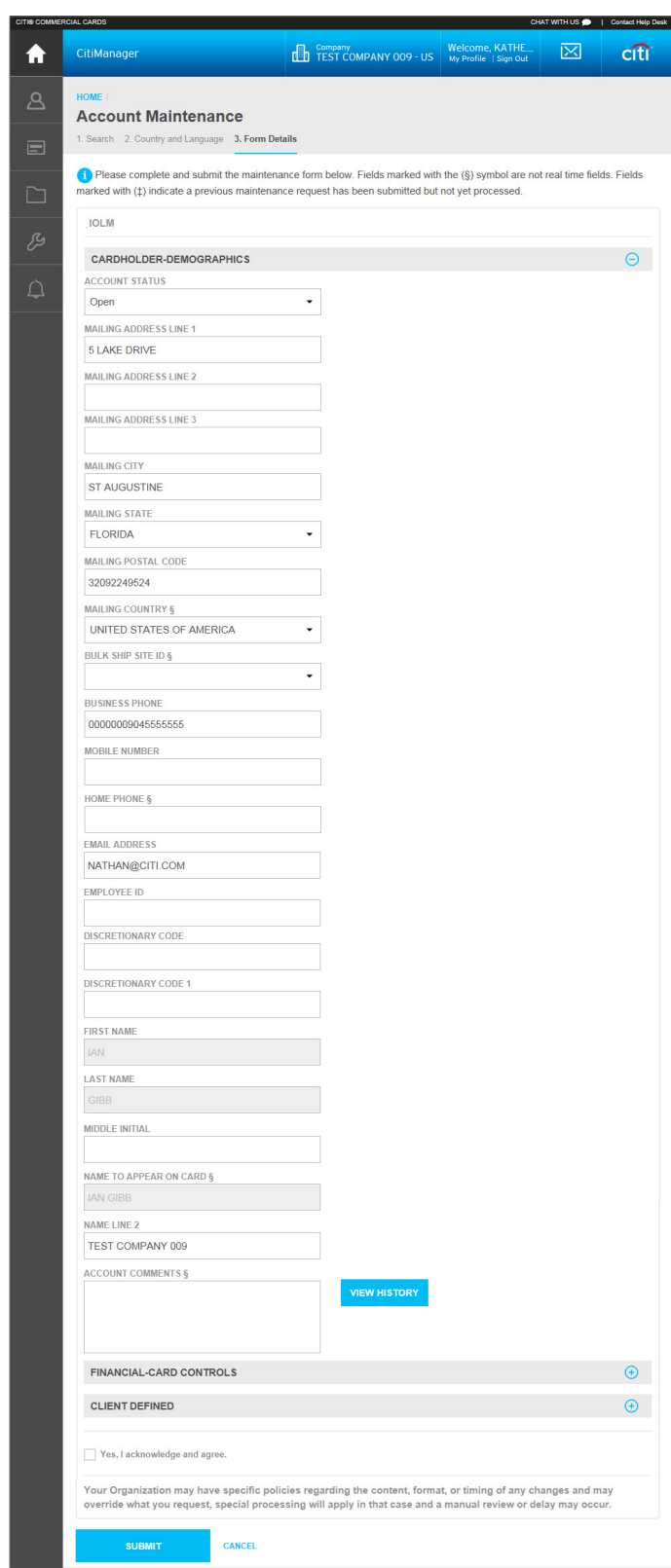
You can maintain information such as the address, credit limit, temporary credit limit, credit rating and Merchant Category Code Groups (MCCGs).

If a replacement card is required, contact Citibank Customer Service to initiate a replacement request.

Step-by-Step Instructions

Screen	Step/Action															
 <p>CitiManager</p> <p>Company CITI DEMO TRAVEL US C 3 - US Welcome, Kathe... My Profile Sign Out Contact Help Desk</p> <p>Search by first or last name ... Card Accounts</p> <p>313 ACCOUNTS OVERDUE NOT AVAILABLE AL CREDIT REMAINING</p> <p>0% UNACTIVATED CARDS 0/5211</p> <p>\$273,412.76 TOTAL RECENT ACTIVITY</p> <p>APPLY FOR NEW CARD ALERTS SET PASSCODE</p> <p>Application Request</p> <table><thead><tr><th>REQUEST ID</th><th>STATUS</th><th>REQUEST TYPE</th></tr></thead><tbody><tr><td>6053232440</td><td>Waiting for approval</td><td>Individual online application</td></tr><tr><td>6048654997</td><td>Waiting for approval</td><td>Individual online application</td></tr></tbody></table> <p>Maintenance Request</p> <table><thead><tr><th>REQUEST ID</th><th>STATUS</th><th>REQUEST TYPE</th></tr></thead><tbody><tr><td colspan="3">There are no pending Maintenance requests that are waiting your approval</td></tr></tbody></table>	REQUEST ID	STATUS	REQUEST TYPE	6053232440	Waiting for approval	Individual online application	6048654997	Waiting for approval	Individual online application	REQUEST ID	STATUS	REQUEST TYPE	There are no pending Maintenance requests that are waiting your approval			<ol style="list-style-type: none">From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Account Maintenance link. <p>Note: You can also click the Account Maintenance link from the Card Details screen.</p> <p><i>The Account Maintenance – Search screen displays.</i></p>
REQUEST ID	STATUS	REQUEST TYPE														
6053232440	Waiting for approval	Individual online application														
6048654997	Waiting for approval	Individual online application														
REQUEST ID	STATUS	REQUEST TYPE														
There are no pending Maintenance requests that are waiting your approval																

Screen	Step/Action
 <p>Account Maintenance – Search Screen</p>	<p>2. To perform a search, type the desired search criteria in Account Number, First Name, Last Name or User Name fields and click the Search button.</p> <p>Note: To search for users at a specific hierarchy level, click the Select Hierarchy link. If necessary, click the (+) plus sign icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the Select button.</p> <p><i>The search results display at the bottom of the screen including the Username, Name, Account Number and Status. The results are based on the hierarchy selected. If no hierarchy was selected, all users display.</i></p> <p>3. Select the radio button for the account you wish to maintain and click the Update Account button.</p> <p><i>The Account Maintenance – Form Details screen displays.</i></p>

Screen	Step/Action
 <p>Account Maintenance – Form Details Screen</p>	<p>4. Complete the necessary updates to all sections of the form.</p> <p>Note: You can maintain information such as the address, credit limit, temporary credit limit, credit rating and MCCGs.</p> <p>Fields marked with the (\$) symbol are not real-time fields. Fields marked with the (‡) indicate a previous maintenance request has been submitted but not yet processed. All un-marked fields are processed in real-time.</p> <p>The Temporary Cash Advance Percentage Start Date, Temporary Credit Limit Start Date, and Temporary Single Purchase Limit Start Date fields are real-time until 5:30 P.M. EST. After 5:30 P.M. EST, you must enter a date that is greater than today's date.</p> <p>To add/remove an MCCG, click the Add/RemoveMCCGroups link in the Spending Controls section. Select or deselect the checkbox(s) for the desired MCCGs. If you are adding and deleting MCCGs to an account, you must perform the additions prior to submitting the deletions. When you are finished, click the Update button and then the Back to Form button.</p> <p>To close an account, from the Spending Controls section, from the Credit Rating drop-down list, select the desired rating.</p> <p>To order a replacement card, you may select the checkbox in the Order a Replacement Card section. Select the address to which you want the replacement card to be delivered.</p> <p>You may also initiate a card replacement in the CitiManager Site when a card has been lost, stolen, never received or damaged. Refer to the Replace Lost/Stolen/Never Received/Damaged Card topic in the CitiManager Non-cardholder End-to-End User Guide for additional information.</p> <p>5. When you are finished updating the form, click the Submit button.</p> <p><i>A confirmation message displays based on the maintenance performed.</i></p> <p>6. Click the OK button.</p> <p><i>A confirmation screen displays at the top of the screen.</i></p>

Manage Application and Maintenance Requests (View Requests)

Key Concepts

You can search for and view all online application and maintenance requests submitted through the CitiManager Site. Non-cardholders can approve or reject the user requests as well as print requests, view the audit log and add comments to a request.

From the **View Request** screen you can also:

- View the Maintenance Audit Log
- Override an approval
- Delete an application request if entitled
- Download applications

The option to approve and reject a request depends on the workflow and the status of the selected request.

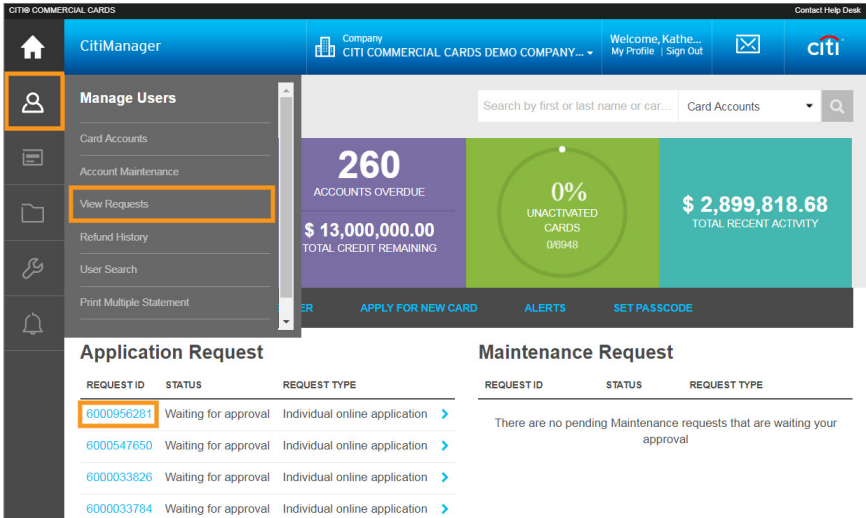
To delete an online application request, a Non-cardholder must have that entitlement assigned to them.

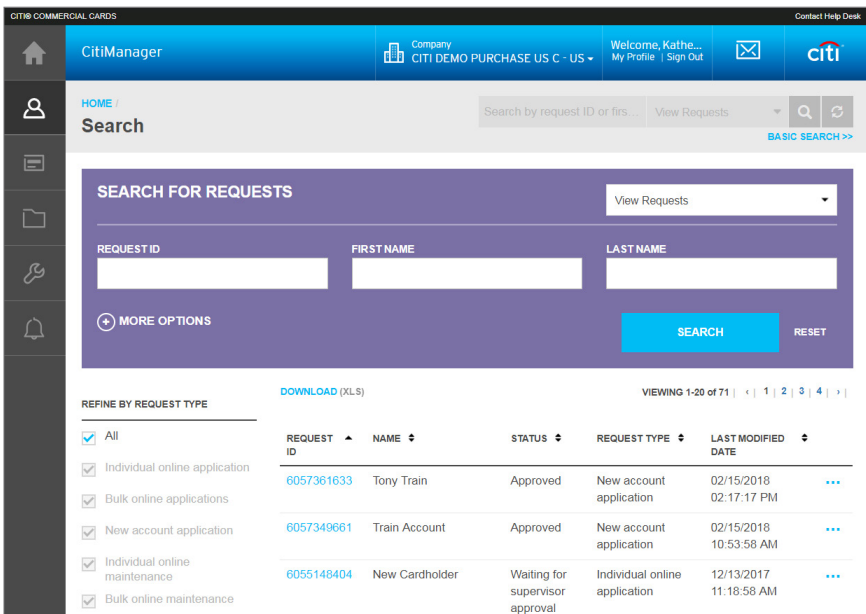
The **Delete Application Request** link is only enabled when the **Select Request Type** is **Individual online application**, **Bulk online application**, or **New account application** and the application status is not **Processed** or **Approved**.

Request Status Descriptions

Request Status	Description
Approved	Request was approved by the non-cardholder and will be processed by Citi.
Draft	Request was saved but not submitted.
More Information Requested	The application was rejected by approver and additional information is being requested.
Pending Final Review by Citi	Request was placed in queue for CAS to process (e.g. when two applications were submitted with the same social security number). This status is not updated in the CitiManager Site. Contact your CAS for the current status of the request.
Processed	Request was processed and a card will be issued.
Waiting for Approval	Online Card Application request is awaiting non-cardholder approval.
Waiting for Signed Copy	Request has been approved but the country regulations require the applicant to sign a physical copy of the application and forward it to (CGSL).
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.

Step-By-Step Instructions

Screen	Step/Action
 <p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the View Requests link, OR From the CitiManager Site Home screen Application Request or Maintenance Request sections, click desired Request ID link and continue to Step 5.

Screen	Step/Action
 <p>Search for Requests Screen</p>	<p>2. To perform a search, type the desired search criteria in the Request ID, First Name or Last Name fields and click the Search button.</p> <p>Note: To perform an advanced search using the User Name, From Date and To Date fields, click the More Options button.</p> <p>To search for users at a specific hierarchy level, click the Lookup Hierarchy link. If necessary, click the (+) plus sign icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the Select button.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>Note: To sort the results by the Request ID, Name, Status or Request Type columns, click the column header name.</p> <p>3. To further filter the requests by type or status, select the desired checkbox(es) in the Refine by Request Type or Refine by Status sections displayed on the right-side of the screen.</p> <p>Note: De-select the All checkboxes first to activate the sort option checkboxes.</p> <p><i>The requests displayed are filtered by the options selected.</i></p> <p>4. To view a request, from the Request ID column, click the link for the request you wish to view.</p> <p><i>The View Request screen displays.</i></p>

Screen	Step/Action
<div> <div> CITI® COMMERCIAL CARDS CitiManager Company CITI DEMO TRAVEL US C 3 - US Welcome, Kathe... My Profile Sign Out Contact Help Desk </div> <div> HOME / VIEW REQUESTS / View Request </div> <div> View/Approve/Reject Request. </div> <div> <div> REQUEST DETAILS VIEW AUDIT DOWNLOAD </div> <div> Commercial Card Application </div> <div> <div> Card Embossing </div> <div> FIRST NAME Savita </div> <div> MIDDLE INITIAL </div> <div> LAST NAME TEST </div> <div> * CORP ID </div> <div> NAME LINE 2 </div> <div> TYPE OF CARD PLASTIC </div> <div> BULK SHIP ID </div> </div> <div> <div> Contact Information </div> <div> Additional Information </div> <div> Spending Controls </div> </div> <div> <input checked="" type="checkbox"/> <p>By clicking below, I confirm that I am an authorised representative; that this application is authorised; and that the details above are true and correct.</p> <p>Use this form to submit a card application. Your Organization may have specific policies regarding the content and may override what you request, special processing will apply in that case and a manual review may occur.</p> <div> <input checked="" type="radio"/> APPROVE <input type="radio"/> REJECT <input type="checkbox"/> Allow for resubmit </div> <div> COMMENTS </div> <div> SUBMIT CANCEL SAVE COMMENT </div> </div> </div> </div>	<ol style="list-style-type: none"> Review the request details. When you are finished reviewing the request, select either the Approve or Reject radio button. <p>Note: If request is rejected, you are required to type a reason for the rejection in Comments field and then click the Save comment link. By default, the Allow for Resubmit checkbox is selected. De-select the checkbox if resubmission is not allowed.</p> When you are finished, click the Submit button. <p>A confirmation message displays.</p>

View Request Screen

Search for User and View Details

Key Concepts

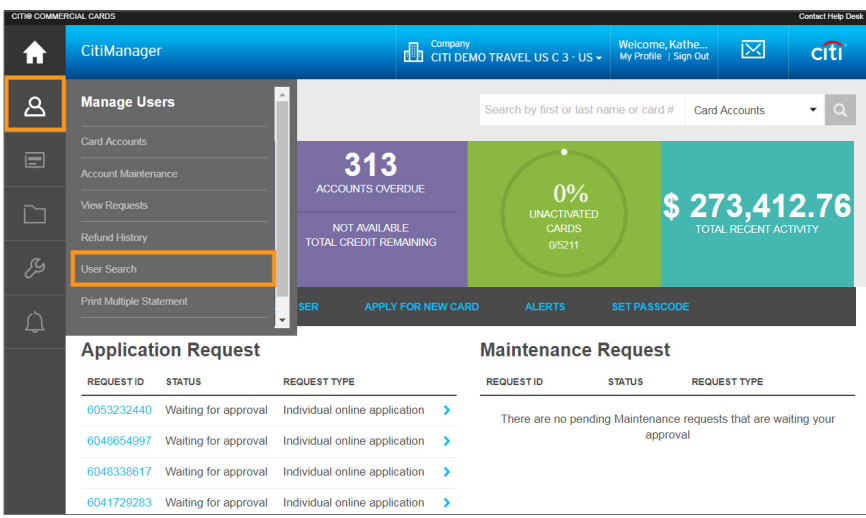
You search for users and then view their account details such as:

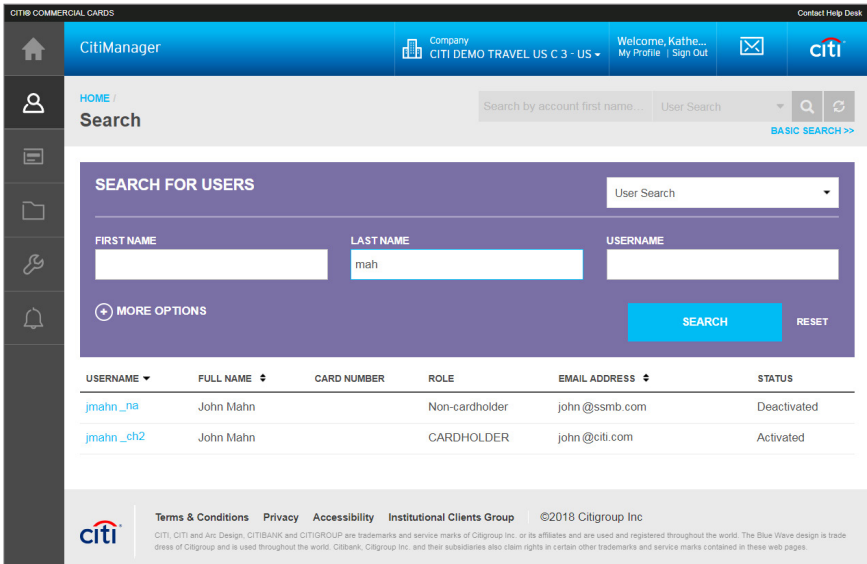
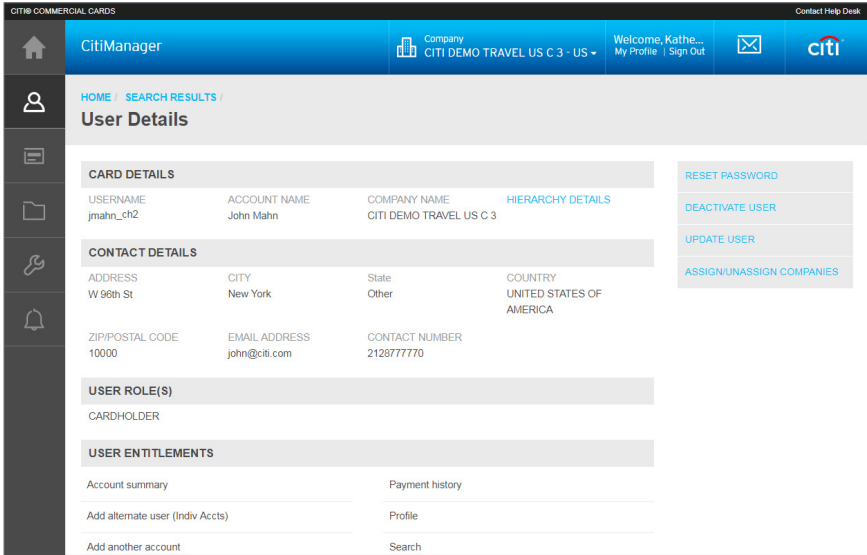
- Card details
- Contact details
- User roles
- User entitlements
- Hierarchy details

From the **User Details** screen you can also use the links that display on the right-hand side to:

- Reset a user's password
- Deactivate a user
- Update a user
- Assign/Unassign companies

Step-by-Step Instructions

Screen	Step/Action
 <p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. <i>The Search screen displays.</i>

Screen	Step/Action
 <p>Search Screen</p>	<p>2. To perform a search, type the desired search criteria in the First Name, Last Name or Username fields and click the Search button.</p> <p>Note: To perform an advanced search using the Card Number, Company Name, Email Address, Employee ID and Status fields, click the More Options button.</p> <p>To search for users at a specific hierarchy level, click the Lookup Hierarchy link. If necessary, click the (+) plus sign icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the Select button.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>Note: To sort the results by the Username, Full Name or Email Address columns, click the column header name.</p> <p>3. From the Username column, click the link for the card account you wish to view.</p> <p><i>The User Details screen displays.</i></p>
 <p>User Details Screen</p>	<p>4. As necessary, click the link for the desired function that displays on the right side of the screen.</p>

Retrieve Forgotten Username

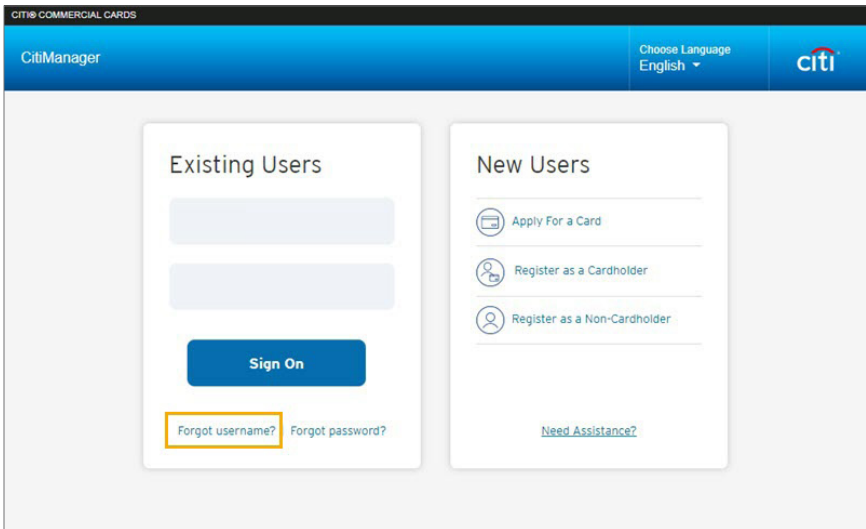
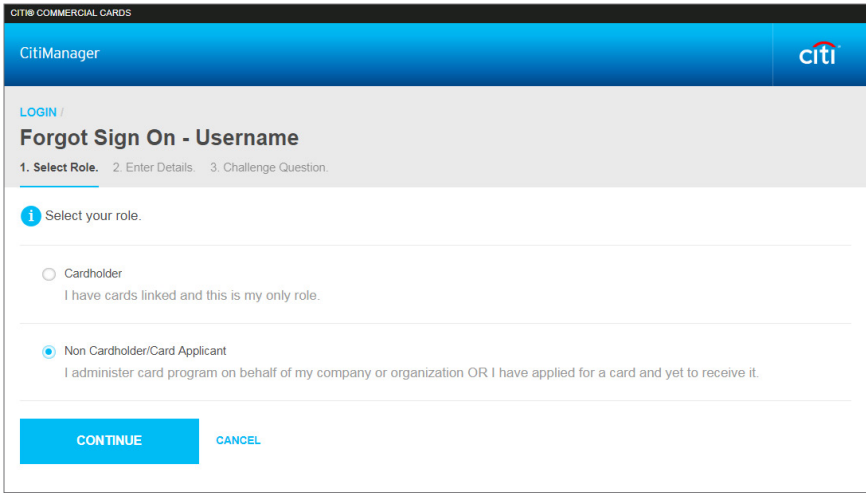
Key Concepts

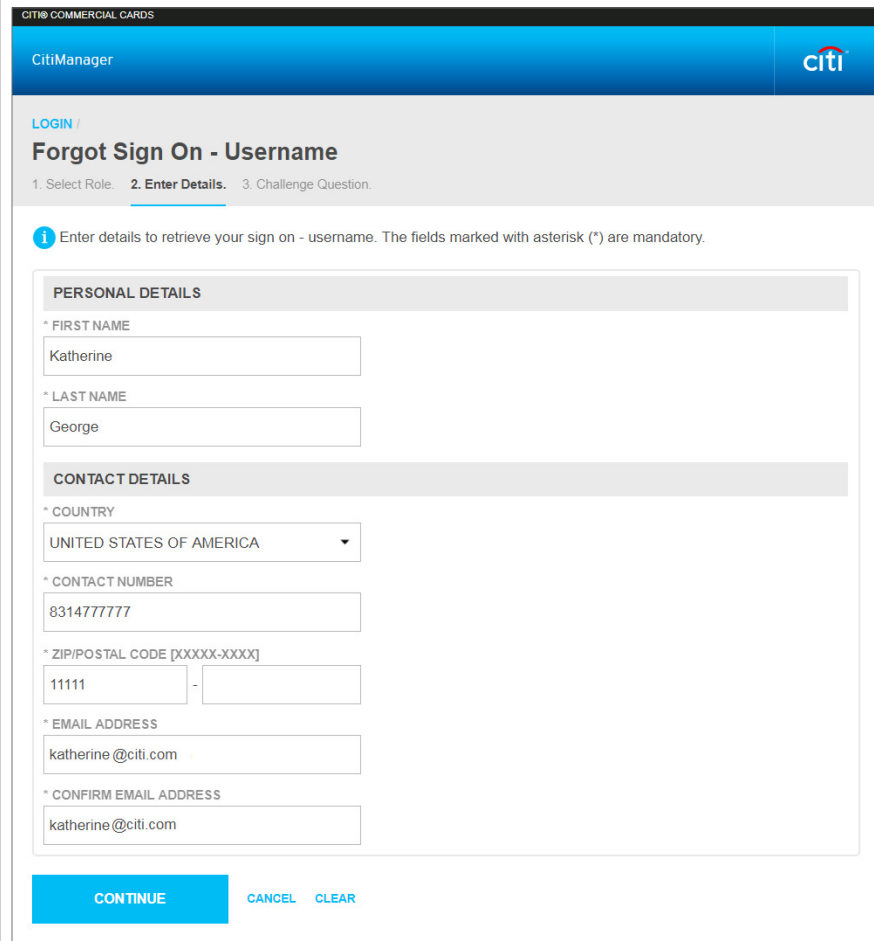
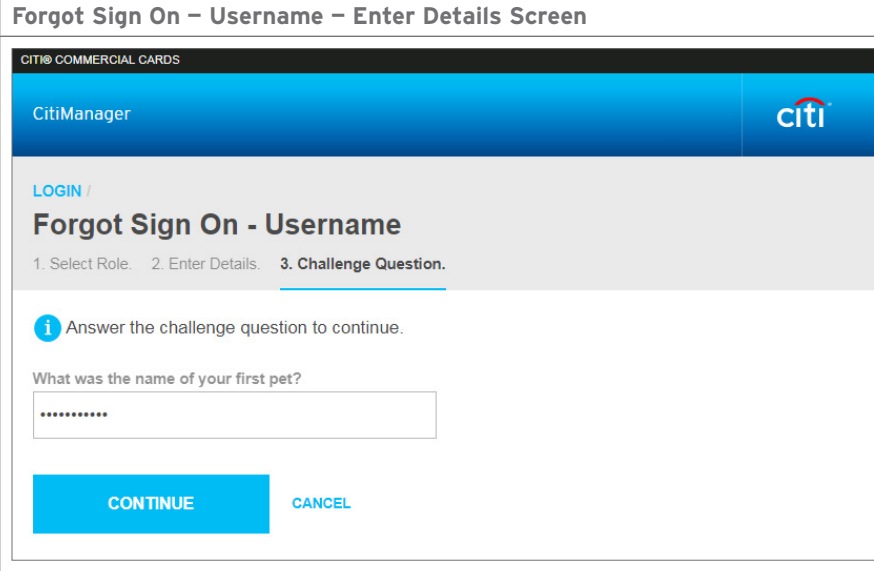
If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

To retrieve your username, the following information is required:

- Your first and last name
- Your country
- Your contact phone number
- The zip code/postal code associated with your user profile
- The e-mail address associated with your user profile

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Login screen. It features a blue header with 'CitiManager' and a 'Choose Language' dropdown set to 'English'. Below the header, there are two main sections: 'Existing Users' and 'New Users'. The 'Existing Users' section has two input fields for username and password, a 'Sign On' button, and links for 'Forgot username?' (highlighted with a yellow box) and 'Forgot password?'. The 'New Users' section has three links: 'Apply For a Card', 'Register as a Cardholder', and 'Register as a Non-Cardholder', along with a 'Need Assistance?' link.</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. From the Existing Users section, click the Forgot username? link. <i>The Forgot Password – Select Role screen displays.</i>
 <p>The screenshot shows the 'Forgot Sign On - Username' screen. It has a blue header with 'CitiManager' and a 'LOGIN /' link. Below the header, it says 'Forgot Sign On - Username' and shows progress: '1. Select Role.' (active), '2. Enter Details.', and '3. Challenge Question.'. An information icon and text 'Select your role.' are present. There are two radio button options: 'Cardholder' (with subtext 'I have cards linked and this is my only role.') and 'Non Cardholder/Card Applicant' (selected, with subtext 'I administer card program on behalf of my company or organization OR I have applied for a card and yet to receive it.'). At the bottom are 'CONTINUE' and 'CANCEL' buttons.</p>	<ol style="list-style-type: none"> 3. Select the Non Cardholder/Card Applicant role radio button and click the Continue button. <i>The Forgot Sign On – Enter Details screen displays.</i>

Screen	Step/Action
 <p>Forgot Sign On – Username – Enter Details Screen</p>	<ol style="list-style-type: none"> 4. In the First Name field, type your first name. 5. In the Last Name field, type your last name. 6. From the Country drop-down list, select your country. 7. In the Contact number field, type your contact phone number. Only numeric values are allowed. 8. In the Zip/Postal code field, type the zip code associated with your user profile. 9. In the Email Address field, type the e-mail address associated with your user profile. 10. In the Confirm Email Address field, re-type the e-mail address that is associated with your user profile. 11. Click the Continue button. <i>The Challenge Question screen displays.</i>
 <p>Forgot Sign On – Username – Challenge Question Screen</p>	<ol style="list-style-type: none"> 12. In the challenge question answer field, type the answer to the challenge question and click the Continue button. <i>A confirmation message displays.</i> Note: You have three attempts to answer the challenge question correctly.



Screen	Step/Action
<div></div> <p>Confirmation Message</p>	<p>13. Click the OK button.</p> <p><i>The CitiManager Site Login screen displays and the CitiManager Site sends an e-mail with your username.</i></p>

Reset Forgotten Password

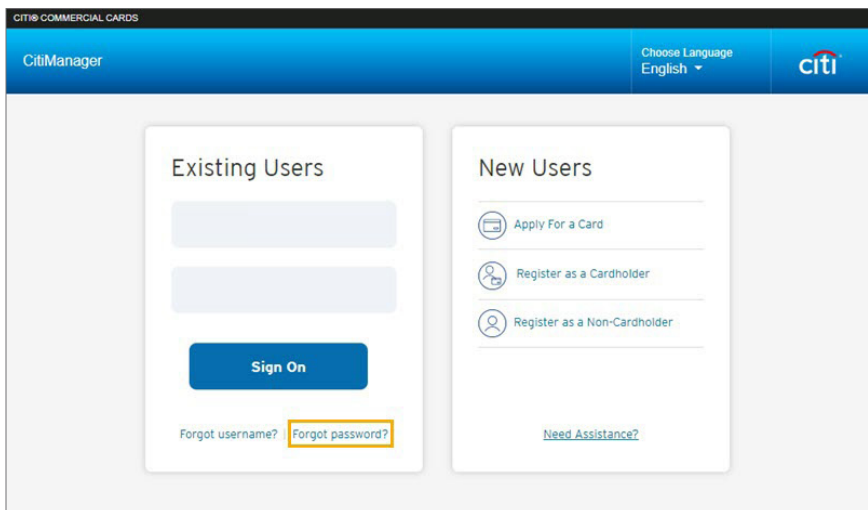
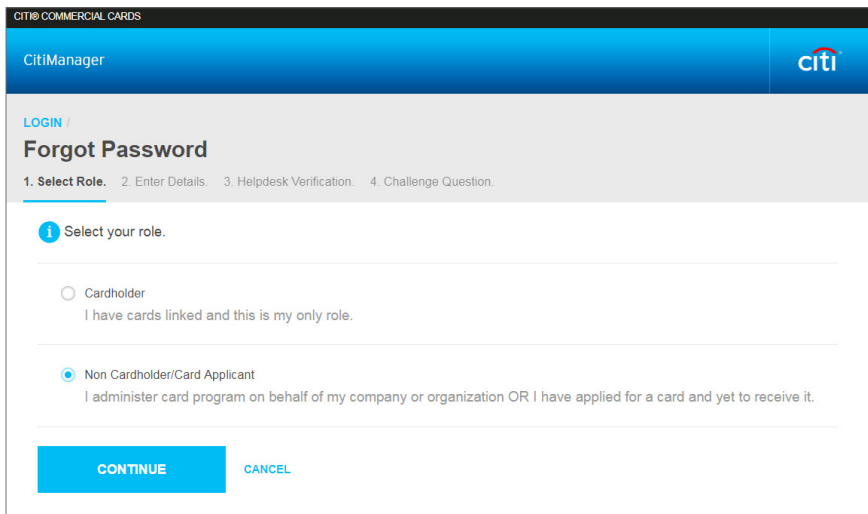
Key Concepts

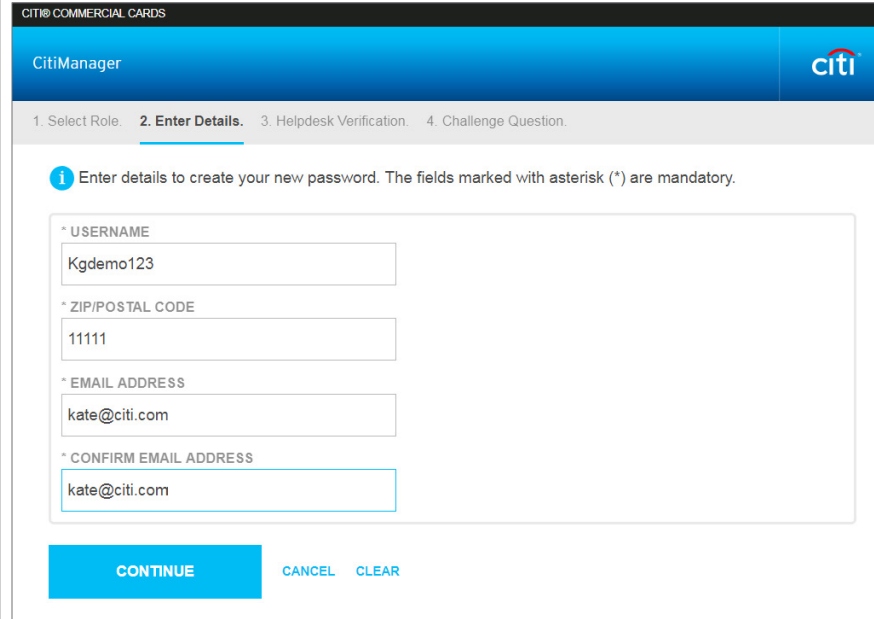
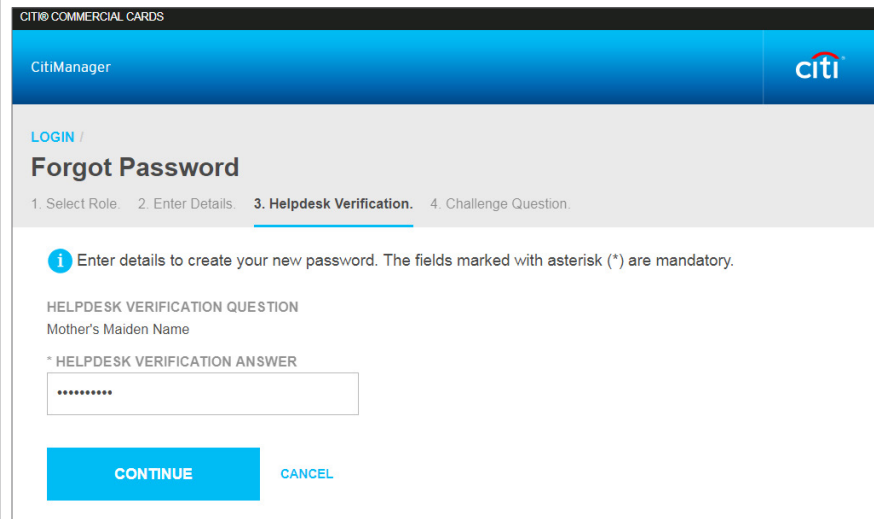
If you forget your password, you will need to reset it in order to sign in to the CitiManager Site.

To reset your password, the following information is required:

- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Home Screen. It features a blue header with 'CitiManager' and a 'Choose Language' dropdown set to 'English'. Below the header, there are two main sections: 'Existing Users' and 'New Users'. The 'Existing Users' section has input fields for username and password, a 'Sign On' button, and links for 'Forgot username?' and 'Forgot password?'. The 'New Users' section has three radio buttons: 'Apply For a Card', 'Register as a Cardholder', and 'Register as a Non-Cardholder', along with a 'Need Assistance?' link.</p> <p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. Click the Forgot password? link. <i>The Forgot Password – Select Role screen displays.</i>
 <p>The screenshot shows the 'Forgot Password – Select Role' screen. It has a blue header with 'CitiManager' and a 'LOGIN /' link. Below the header, the title 'Forgot Password' is displayed. A progress bar shows four steps: '1. Select Role.', '2. Enter Details.', '3. Helpdesk Verification.', and '4. Challenge Question.'. The '1. Select Role.' step is active, showing two radio button options: 'Cardholder' (with the note 'I have cards linked and this is my only role.') and 'Non Cardholder/Card Applicant' (with the note 'I administer card program on behalf of my company or organization OR I have applied for a card and yet to receive it.'). At the bottom, there are 'CONTINUE' and 'CANCEL' buttons.</p> <p>Forgot Password – Select Role Screen</p>	<ol style="list-style-type: none"> 3. Select the Non Cardholder/Card Applicant role radio button and click the Continue button. <i>The Forgot Password – Enter Details screen displays.</i>

Screen	Step/Action
 <p>Forgot Password – Enter Details Screen</p>	<ol style="list-style-type: none"> 4. In the Username field, type your username. 5. In the Zip/Postal Code field, type the zip code associated with your user profile. 6. In the Email Address field, type the e-mail address associated with your user profile. 7. In the Confirm Email Address field, re-type the e-mail address associated with your user profile. 8. To validate the information entered, click the Continue button. <p><i>The Forgot Password – Helpdesk Verification screen displays.</i></p>
 <p>Forgot Password – Helpdesk Verification</p>	<ol style="list-style-type: none"> 9. In the Helpdesk Verification Answer field, type the answer to the verification question. 10. Click the Continue button. <p><i>The Forgot Password – Challenge Question screen displays.</i></p>



Screen	Step/Action
<div><div>CITI® COMMERCIAL CARDS</div><div>CitiManager</div><div><div>LOGIN /</div><div>Forgot Password</div><div>1. Select Role. 2. Enter Details. 3. Helpdesk Verification. 4. Challenge Question.</div><div><div><div>i</div><div>Answer the challenge question to continue.</div></div><div>What is your favorite animal?</div><div><div>.....</div></div><div><div>CONTINUE</div><div>CANCEL</div></div></div></div></div> <div>11. In the challenge question answer field, type the answer to the challenge question and click the Continue button. <i>A confirmation message displays indicating a temporary password has been created and sent to your e-mail address.</i></div>	
<div><div>CITI® COMMERCIAL CARDS</div><div>CitiManager</div><div><div>LOGIN /</div><div>Forgot Password</div><div>1. Select Role. 2. Enter Details. 3. Helpdesk Verification. 4. Challenge Question.</div><div><div><div>i</div><div>Answer the challenge question to continue.</div></div><div>What is your favorite animal?</div><div><div>.....</div></div><div><div>CONTINUE</div><div>CANCEL</div></div></div><div><div>A temporary password has been generated and sent to your email address.</div><div>OK</div></div></div><div>12. Click the OK button. <i>The CitiManager Site Login screen displays.</i></div></div>	
Confirmation Message	

