

CitiManager[®] Site Non-cardholder

Quick Start Guide

July 2018

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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:

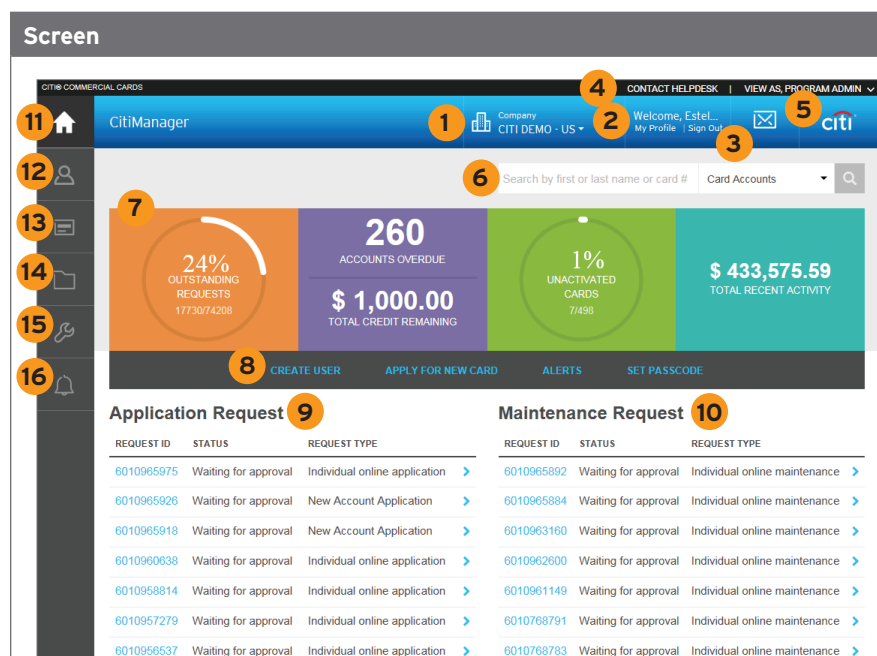
- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations
- Review and approve/reject application and maintenance requests
- Perform account maintenance
- Create users
- Activate and deactivate users
- Assign applications and companies
- Set passcodes
- Manage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

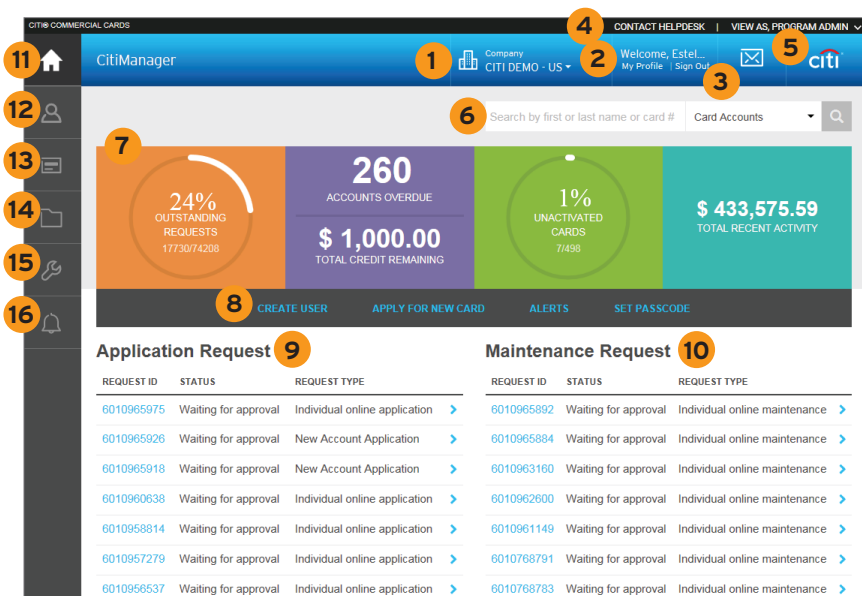
Basic Navigation

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-drop 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.

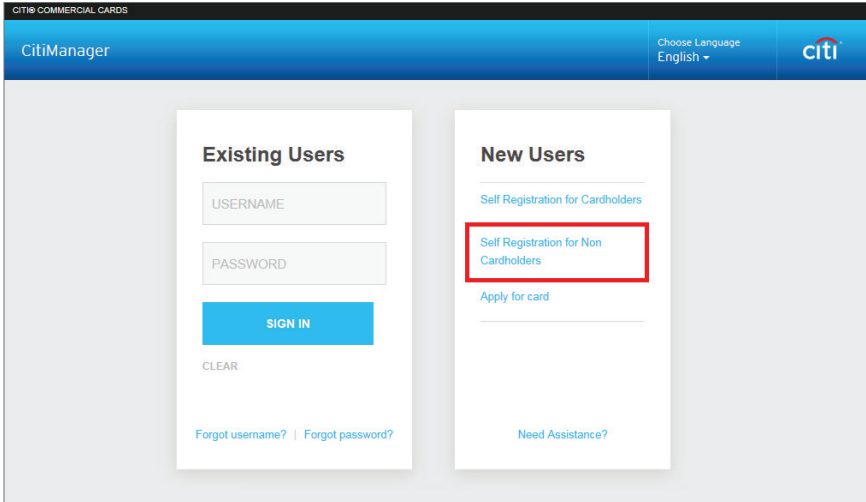
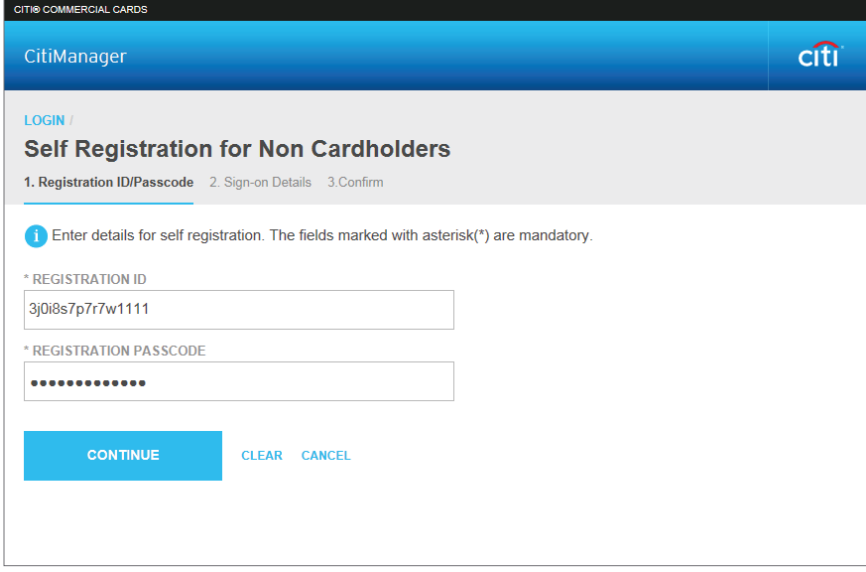
In order to self-register, a Registration ID and Registration Passcode are required.

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.

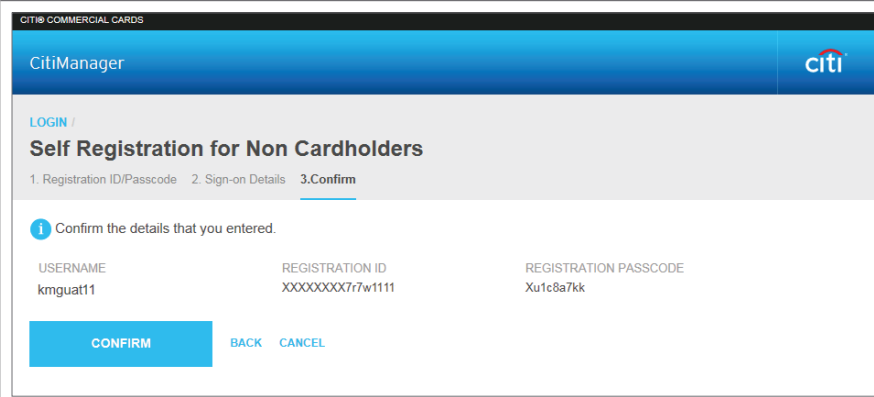
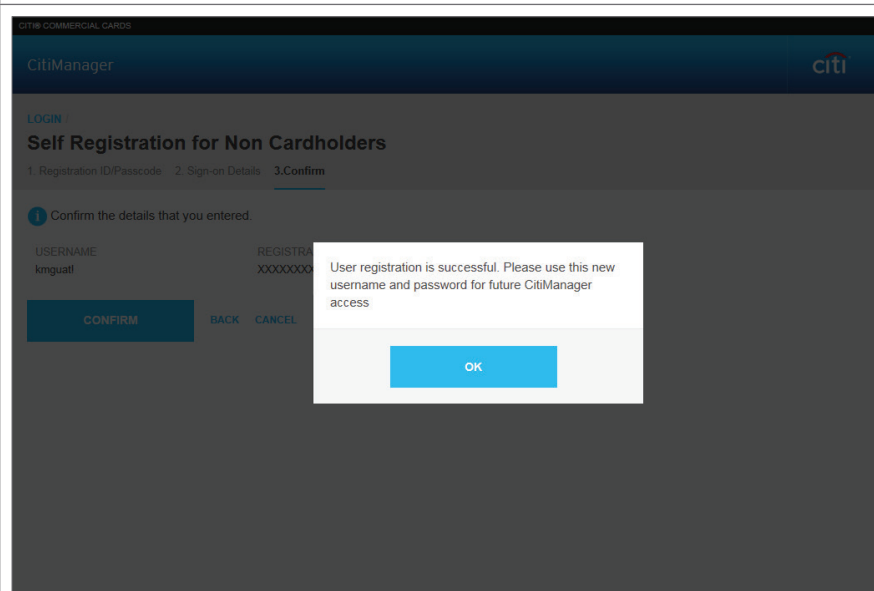
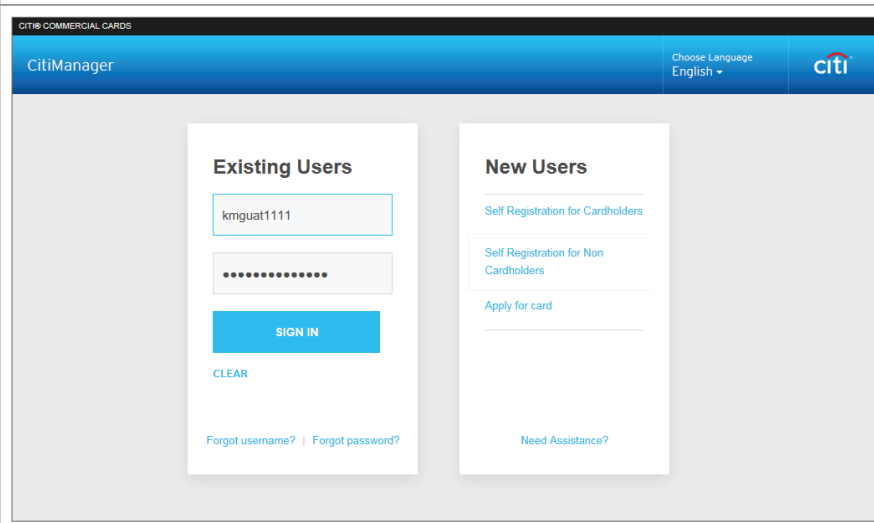
The Registration ID and Passcode can be reset by your administrator.

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager login page. On the left, under 'Existing Users', there are fields for USERNAME and PASSWORD, a SIGN IN button, and a CLEAR link. On the right, under 'New Users', there are links for 'Self Registration for Cardholders', 'Self Registration for Non Cardholders' (highlighted with a red box), and 'Apply for card'. At the bottom of the 'New Users' section is 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 New Users section click the Self Registration for Non Cardholders link. <i>The Registration ID/Passcode screen displays.</i>
 <p>The screenshot shows the 'Self Registration for Non Cardholders' screen. It has a progress bar with three steps: '1. Registration ID/Passcode' (active), '2. Sign-on Details', and '3. Confirm'. Below the progress bar, an information icon and text state: 'Enter details for self registration. The fields marked with asterisk(*) are mandatory.' There are two mandatory fields: '* REGISTRATION ID' with the value '3j0i8s7p7r7w1111' and '* REGISTRATION PASSCODE' with masked characters. At the bottom are buttons for CONTINUE, CLEAR, and CANCEL.</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
<div> <div>CITI COMMERCIAL CARDS</div> <div>CitiManager</div> <div> <div>LOGIN /</div> <div>Self Registration for Non Cardholders</div> <div>1.Registration ID/Passcode 2. Sign-on Details 3. Confirm</div> </div> <div> <div>Enter details for sign on. The fields marked with asterisk (*) are mandatory.</div> <div> <div>* USERNAME</div> <div>kmguat11</div> </div> <div> <div>* PASSWORD</div> <div>.....</div> </div> <div> <div>* CONFIRM PASSWORD</div> <div>.....</div> </div> <div> <div>ZIP/POSTAL CODE [XXXXX-XXXX]</div> <div>11111 - </div> </div> <div> <div>* CONTACT NUMBER</div> <div>8314777777</div> </div> <div> <div>* USER PROFILE EMAIL ADDRESS</div> <div>Katherine@citi.com</div> </div> <div> <div>* CONFIRM USER PROFILE EMAIL ADDRESS</div> <div>Katherine@citi.com</div> </div> <div> <div><input checked="" type="checkbox"/> INTERNAL CITIBANK EMPLOYEE</div> </div> <div> <div>* SOE ID</div> <div></div> </div> <div> <div>* HELPDASK VERIFICATION QUESTION</div> <div>Mother's Maiden Name</div> </div> <div> <div>* HELPDASK VERIFICATION ANSWER</div> <div>.....</div> </div> <div> <div>* CONFIRM HELPDASK VERIFICATION ANSWER</div> <div>.....</div> </div> <div> <div>CONTINUE</div> <div>BACK CANCEL CLEAR</div> </div> </div> </div>	<ol style="list-style-type: none"> 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. 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. In the Confirm Password field, re-type the password. Verify the information in the Zip/Postal Code, Contact Number and User Profile Email Address fields and update if necessary. 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. From the Helpdesk Verification Answer field, type an answer to the Helpdesk verification question you selected. 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 dialog box over 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.</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 login screen with two main sections: 'Existing Users' and 'New Users'. The 'Existing Users' section has input fields for username (pre-filled with 'kmguat1111') and password, a 'SIGN IN' button, and a 'CLEAR' link. The 'New Users' section has links for 'Self Registration for Cardholders', 'Self Registration for Non Cardholders', and 'Apply for card'. There are also links for 'Forgot username?', 'Forgot password?', and 'Need Assistance?'.</p>	<p>15. Type your username and password and click the Sign In button.</p> <p><i>The Reset Challenge Questions and Answers screen displays.</i></p>



Screen	Step/Action
<div><div><div>CitiManager</div><div>Sign Out</div><div>citi</div></div><div><div>LOGIN /</div><div>Reset Challenge Questions and Answers</div></div><div><div><div>Select challenge questions and set answers.</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><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

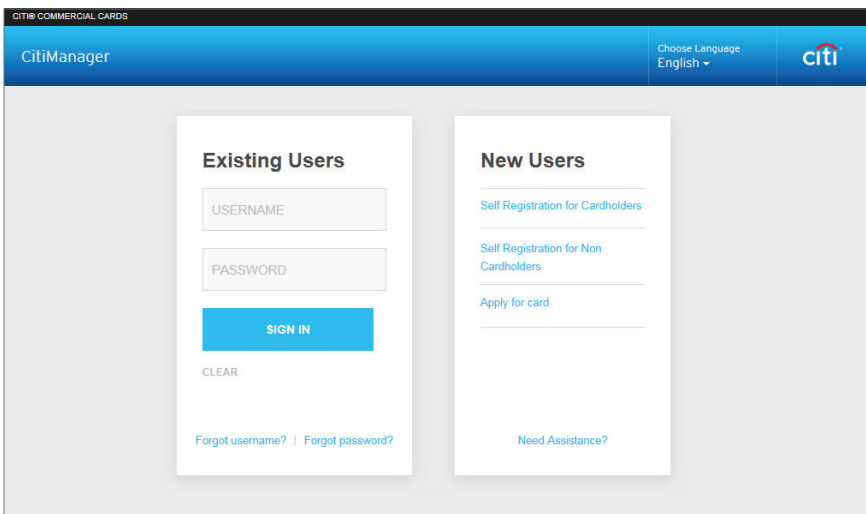
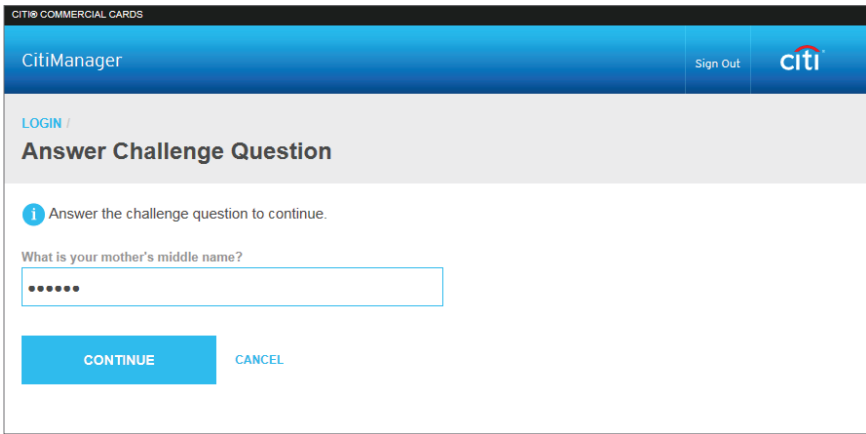
Key Concepts

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.

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' dropdown set to 'English'. The main content area has two columns: 'Existing Users' with fields for 'USERNAME' and 'PASSWORD', a 'SIGN IN' button, and a 'CLEAR' link; and 'New Users' with links for 'Self Registration for Cardholders', 'Self Registration for Non Cardholders', and 'Apply for card'. At the bottom of each column are links for 'Forgot username?' and 'Forgot password?' (under Existing Users) and 'Need Assistance?' (under New Users).</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. In the Username field, type your username. 3. In the Password field, type your password. 4. Click the Sign In 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. Below the header is a 'LOGIN /' link and the title 'Answer Challenge Question'. An information icon is followed by the text 'Answer the challenge question to continue.' Below this is a text input field with the prompt 'What is your mother's middle name?' and a masked input field with six dots. At the bottom are 'CONTINUE' and 'CANCEL' buttons.</p>	<ol style="list-style-type: none"> 5. Answer the challenge question and click the Continue button. <i>The CitiManager Site Home screen displays.</i>

View Card Account Details

Key Concepts

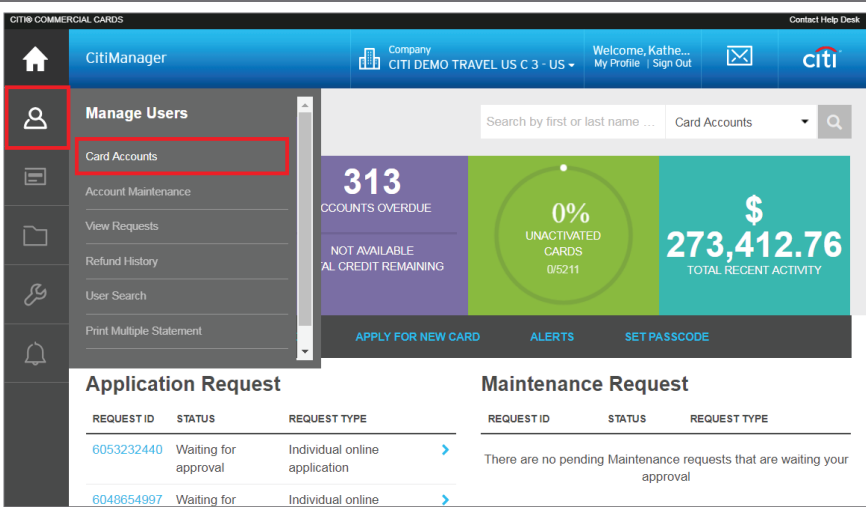
You can search for Cardholder accounts that reside in your assigned hierarchies. Once the search is complete, you may view:

- 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.

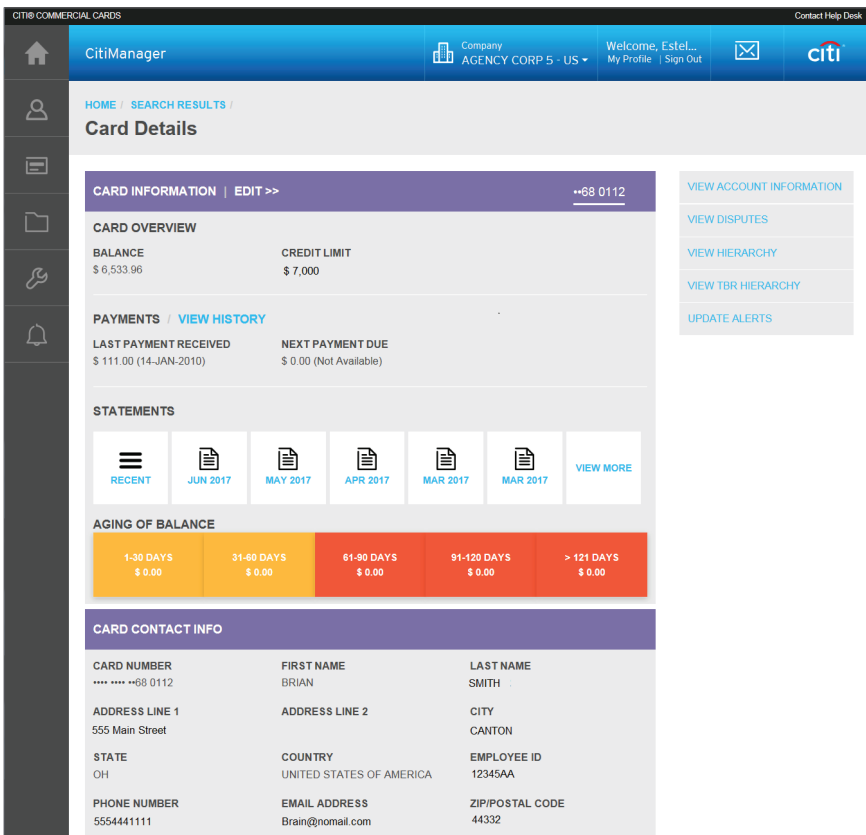
The **Card Details** screen is also a launching point if you want to view recent transactions, billed statements/transactions or perform other actions such as viewing disputes if they were submitted through the CitiManager Site, viewing the account hierarchy or setting alerts for the Cardholder.

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>CITI® COMMERCIAL CARDS</div><div>CONTACT HELP DESK</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>VIEWING 1-20 OF 144</div><div><div>CARD NUMBER</div><div>USERNAME</div><div>CARD NAME</div><div>STATUS</div><div>BILL TYPE</div></div><div><div>..... **03 1754</div><div>Justin A KBussard</div><div>Activated</div><div>Individually billed card</div></div><div><div>..... **03 4645</div><div>Sheryl A Samuel</div><div>Activated</div><div>Individually billed card</div></div></div></div>	<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.</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>

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

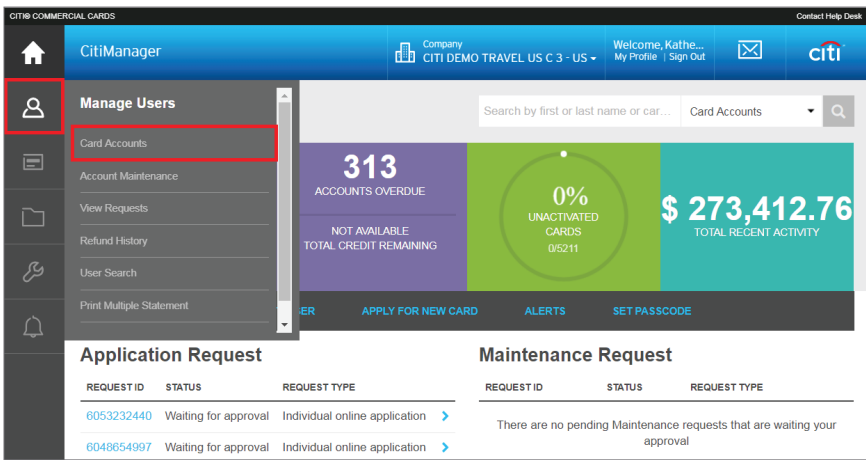
You can view a Cardholder's current statement or a statement from previous months. You can also view recent transactions for a Cardholder that have posted to the account but have not yet been billed to a statement.

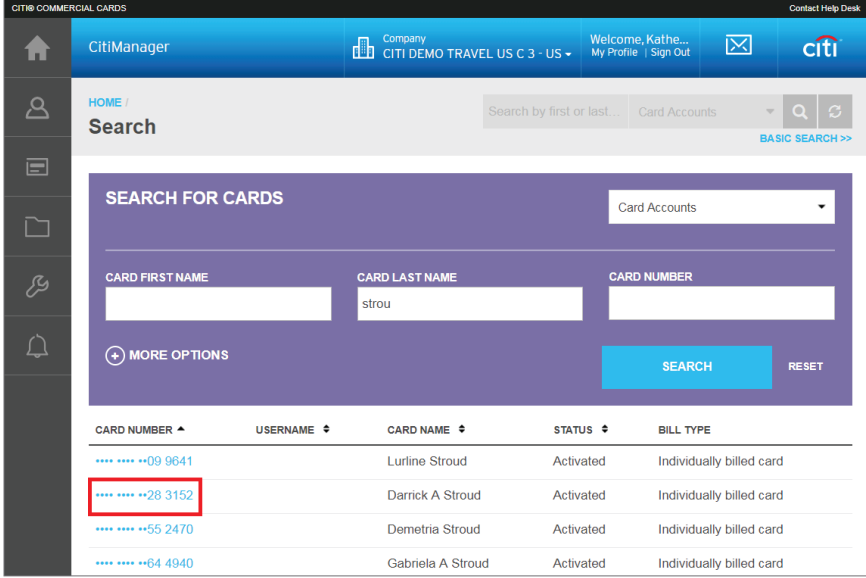
The **Statements** screen displays a snapshot of balances, payments posted and due dates. A list of transactions also displays and at the bottom the screen and you can expand each to view additional detail that may have been sent to Citi from a merchant. Transaction detail will include the original currency 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. <i>The Search for Cards screen displays.</i>

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.</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

Step/Action

CITI® COMMERCIAL CARDS

Contact Help Desk

Home

Company

CITI DEMO TRAVEL US C 3 - US

Welcome, Kathe...

My Profile

Sign Out

citi

HOME / SEARCH RESULTS /

Card Details

CARD INFORMATION | EDIT >>

--28 3152

VIEW ACCOUNT INFORMATION

VIEW DISPUTES

VIEW HIERARCHY

CARD OVERVIEW

BALANCE

\$ 142.44

CREDIT LIMIT

\$ 3,500.00

PAYMENTS | VIEW HISTORY

LAST PAYMENT RECEIVED

\$ 47.60 (07/09/2010)

NEXT PAYMENT DUE

\$ 71.38 (08/14/2010)

STATEMENTS

RECENT

JUL 2010

JUN 2010

AGING OF BALANCE

1-30 DAYS

\$ 0.00

31-60 DAYS

\$ 0.00

61-90 DAYS

\$ 0.00

91-120 DAYS

\$ 0.00

> 121 DAYS

\$ 0.00

CARD CONTACT INFO

CARD NUMBER

.... --28 3152

FIRST NAME

Darrick A

LAST NAME

Stroud

ADDRESS LINE 1

2106769 MAIN STREET

ADDRESS LINE 2

Second Address Line 106147

CITY

HOUSTON

STATE

TX

COUNTRY

UNITED STATES OF AMERICA

EMPLOYEE ID

00603596

PHONE NUMBER

7720323350

MOBILE PHONE NUMBER

000000000000000000

FAX NUMBER

000000000000000000

EMAIL ADDRESS

FNAME.LNAME@PROVIDER.COM

ZIP/POSTAL CODE

770321955

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

Card Details Screen

Screen

Statements Screen

Step/Action

5. 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 or Recent Transactions** section and click the **Search** icon. Click the **Advanced Search** link to access additional search criteria.

The transactions are filtered by the search criteria entered.
6. 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 detail displays.

Statements 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 Program Administrator to update Cardholder account information such as card address, discretionary codes, and spending controls and temporary spending controls.

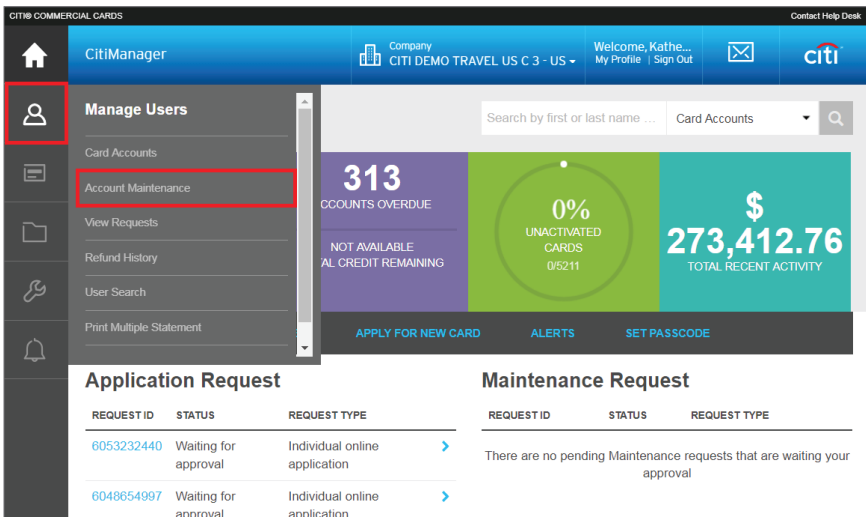
You can maintain information such as the address, credit limit, temporary credit limit, credit rating and Merchant Category Code Groups (MCCGs).

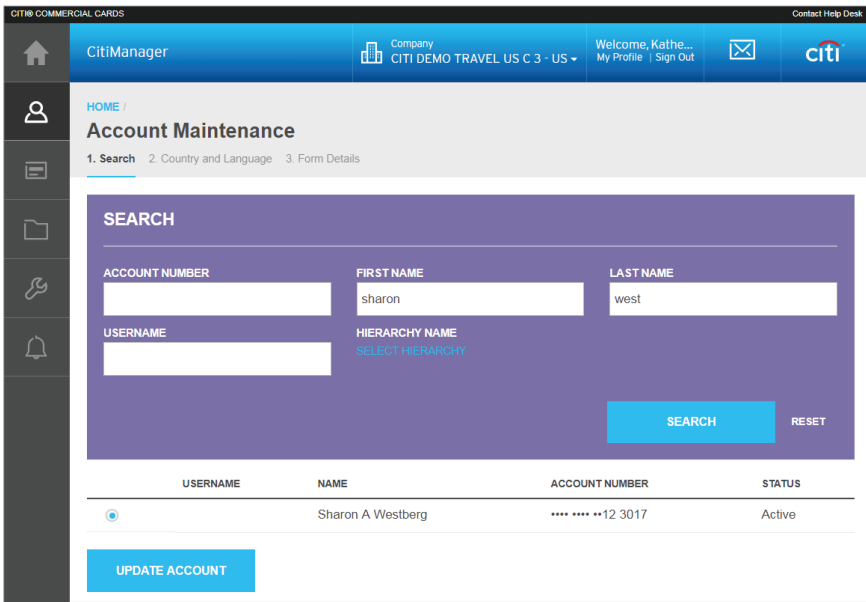
You can also close an account by selecting the appropriate credit rating from the **Spending Controls** section: There are three types of closures available depending on entitlements:

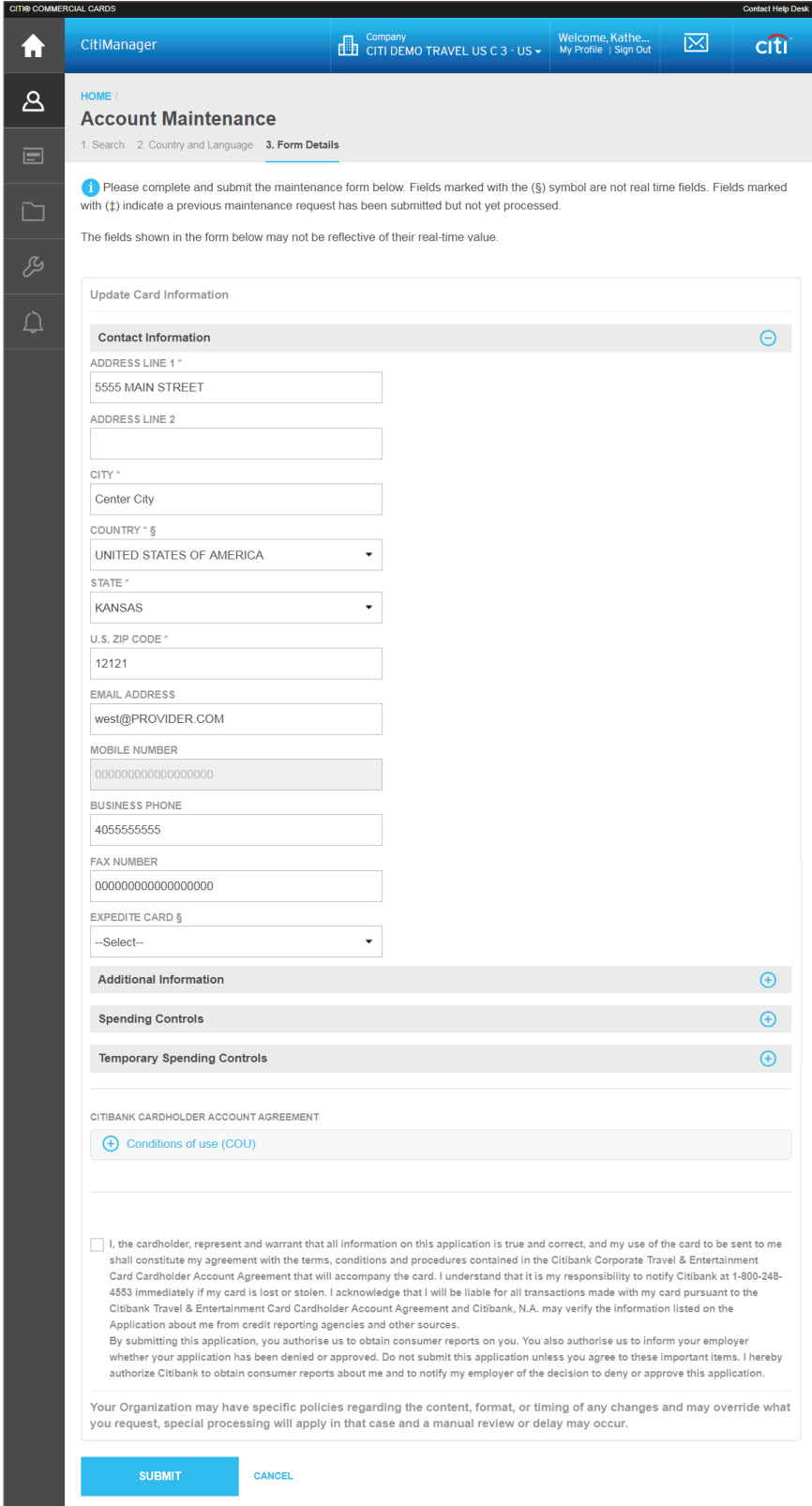
- **T1** – A cardholder left the company
- **V9** – Company Closure/Suspension
- **B9** – Deceased

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

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 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>

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>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>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>

Account Maintenance – Form Details Screen

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.

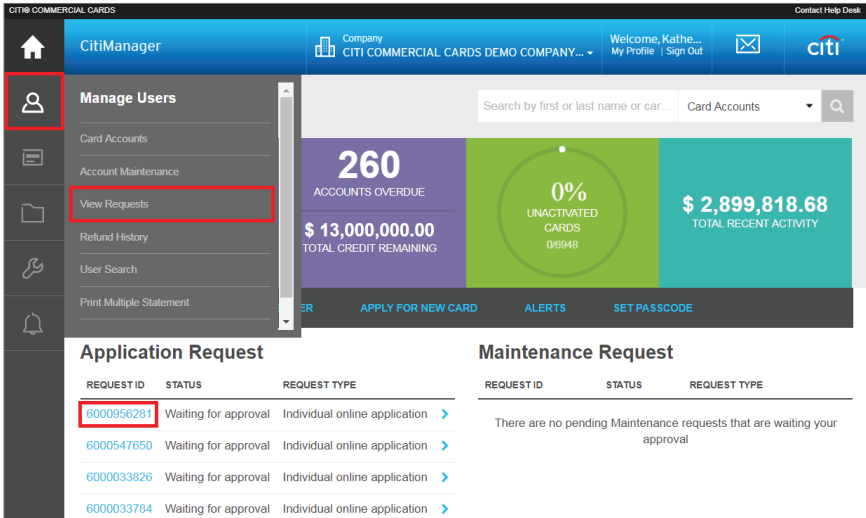
To delete an online application request, a Non-cardholder must have that entitlement assigned to them.

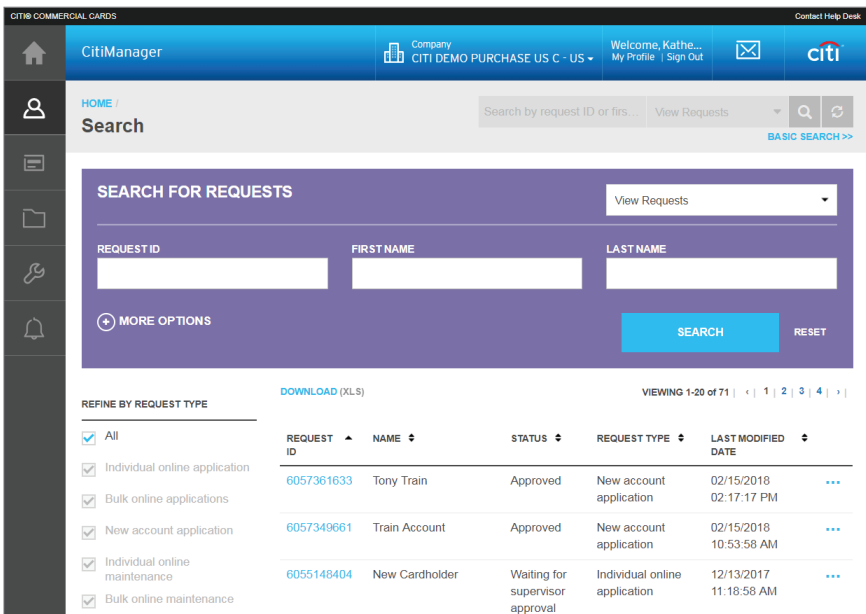
The **Delete Application Request** link is only enabled when the **Select Request Type** is **Individual online application**, **Bulk online application**, or **New account application** and the application status is not **Processed** or **Approved**.

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	Request was sent back by the approver requesting additional information.
Processed	Request was processed and a card will be issued.
Rejected	Request has been rejected.
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.
Withdrawn	Applicant has withdrawn the application request.
Expired	Request was not handled within a predefined time period.
Pending Authentications	Maintenance request was submitted but an Online Authorization Code (OAC) is sent to him/her.

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><div>CITI® COMMERCIAL CARDS</div><div><div><div>Home</div><div>Company</div><div>CITI DEMO TRAVEL US C 3 - US</div><div>Welcome, Kathe...</div><div>My Profile</div><div>Sign Out</div><div></div><div>citi</div></div><div><div>HOME / VIEW REQUESTS /</div><div>View Request</div></div><div><div>View/Approve/Reject Request.</div><div><div>REQUEST DETAILS</div><div><div>REQUEST ID</div><div>6048654997</div></div><div><div>CURRENT STATUS</div><div>Waiting for approval</div></div><div><div>LAST MODIFIED DATE</div><div>06/15/2017 09:42:11 AM</div></div><div><div>FORM ID</div><div>1467</div></div><div><div>VIEW AUDIT</div><div>DOWNLOAD</div></div></div><div><div>Commercial Card Application</div><div><div>Card Embossing</div><div><div>FIRST NAME</div><div>Savita</div></div><div><div>MIDDLE INITIAL</div><div></div></div><div><div>LAST NAME</div><div>TEST</div></div><div><div>* CORP ID</div><div></div></div><div><div>NAME LINE 2</div><div></div></div><div><div>TYPE OF CARD PLASTIC</div><div></div></div><div><div>BULK SHIP ID</div><div></div></div></div><div><div>Contact Information</div><div>Additional Information</div><div>Spending Controls</div></div><div><div><input checked="" type="checkbox"/></div><div>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.</div></div><div><div>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.</div><div><div><input checked="" type="radio"/> APPROVE</div><div><input type="radio"/> REJECT</div><div><input type="checkbox"/> Allow for resubmit</div></div><div><div>COMMENTS</div><div></div></div><div><div>SUBMIT</div><div>CANCEL</div><div>SAVE COMMENT</div></div></div></div></div></div></div></div>	<div><div>5. Review the request details.</div><div>6. When you are finished reviewing the request, select either the Approve or Reject radio button.<div><div>Note:</div><div>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.</div></div></div><div>7. When you are finished, click the Submit button.<div><div>A confirmation message displays.</div></div></div></div>

View Request Screen

View Request Screen

Search for User and View Details

Key Concepts

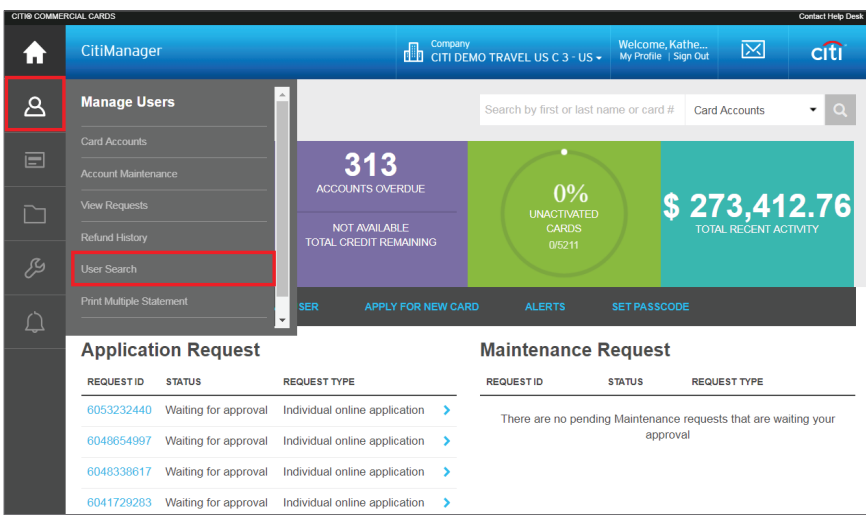
You search for users and then view their account details such as:

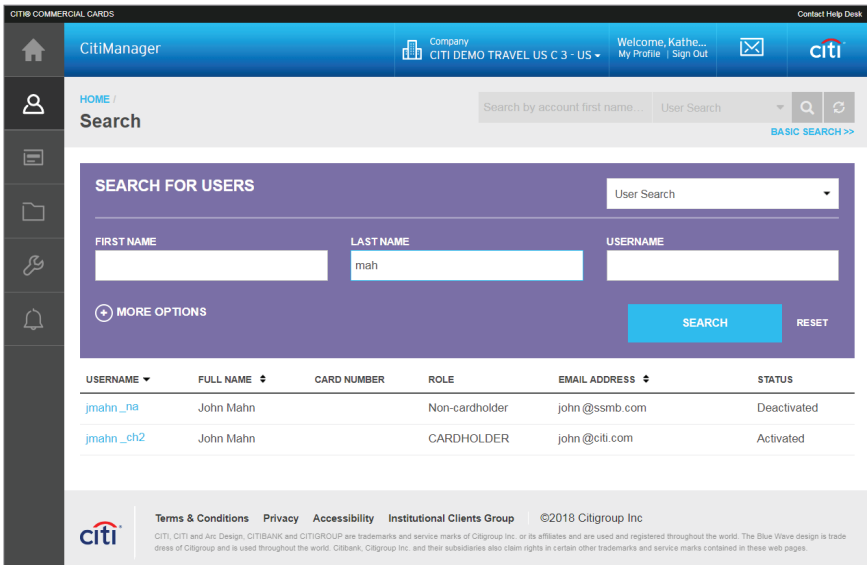
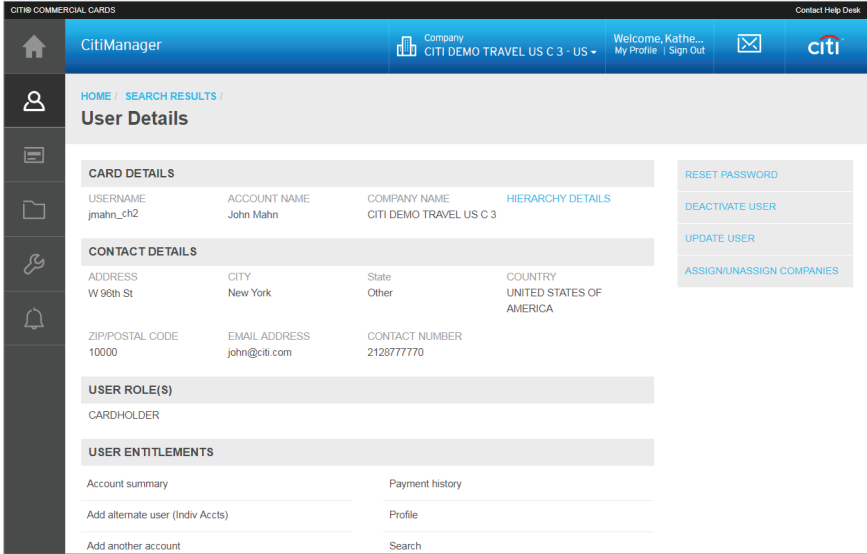
- Card details
- Contact details
- User roles
- User entitlements
- Hierarchy details

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

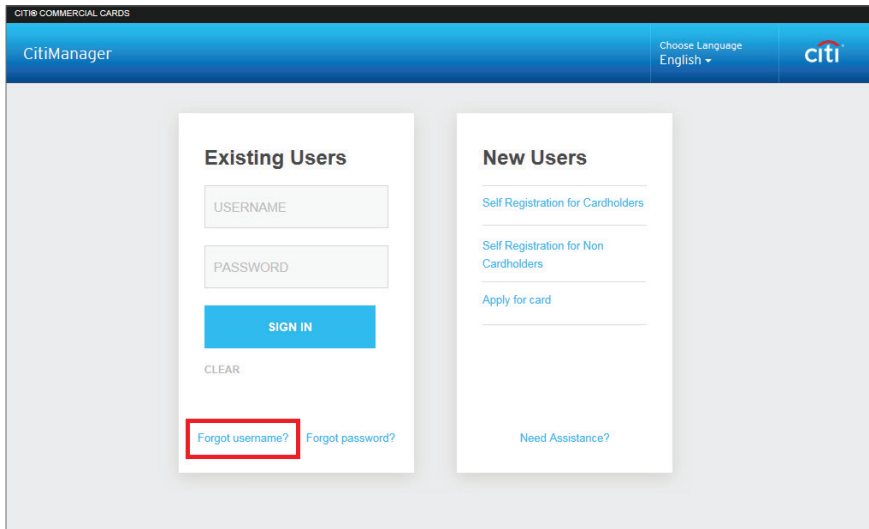
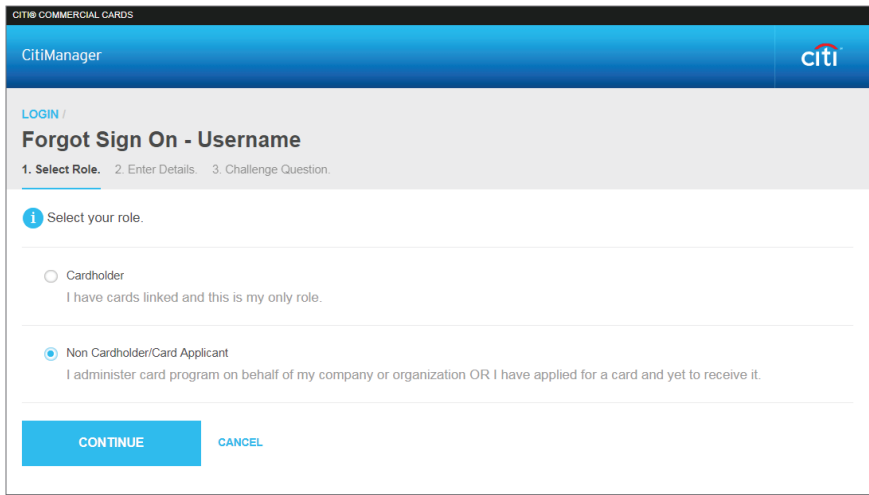
Key Concepts

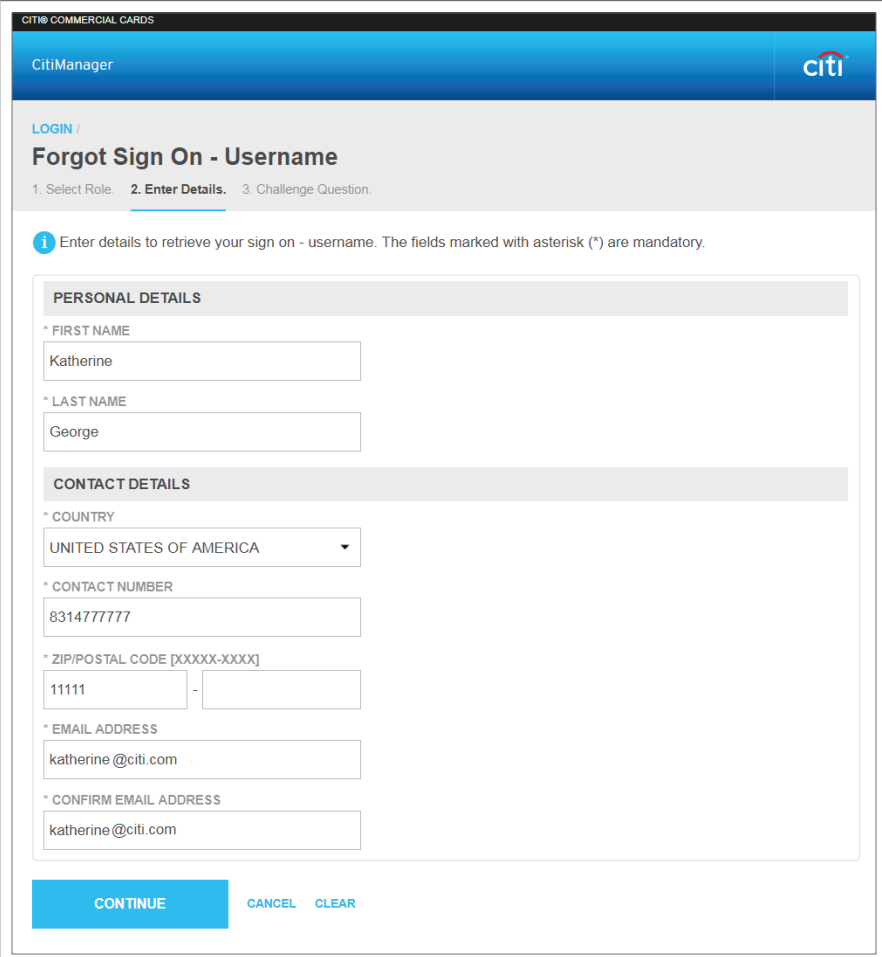
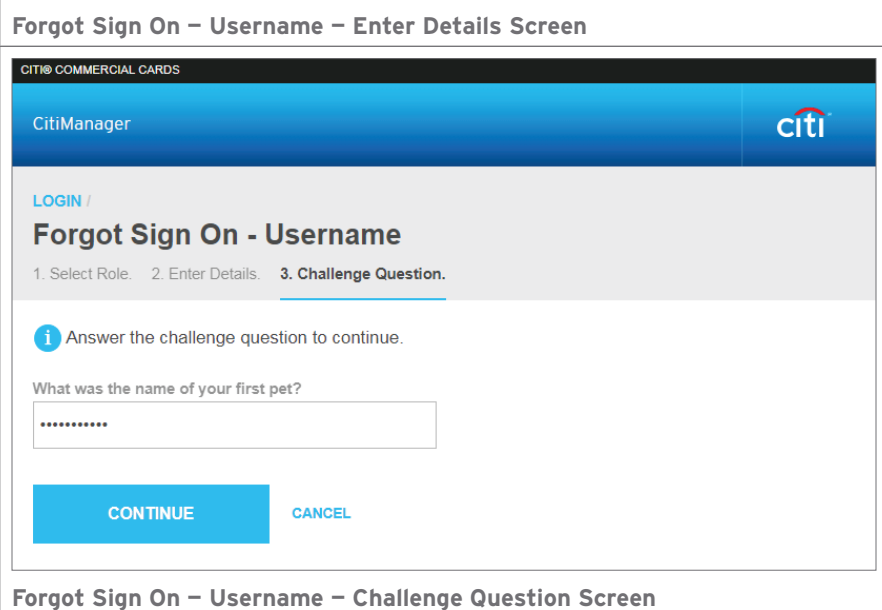
If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

To retrieve your username, the following information is required:

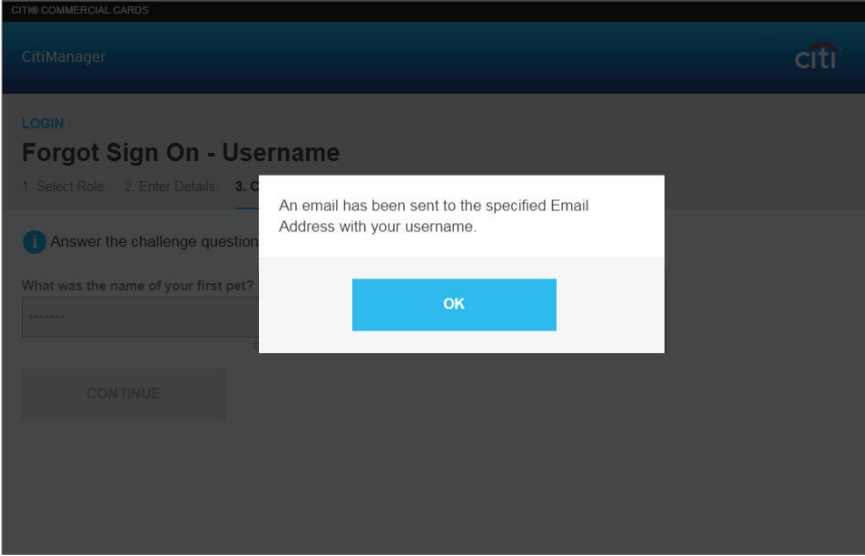
- Your first and last name
- Your country
- Your contact phone number
- The zip code/postal code associated with your user profile
- The e-mail address associated with your user profile

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Login screen. It features two main sections: 'Existing Users' and 'New Users'. In the 'Existing Users' section, there are input fields for 'USERNAME' and 'PASSWORD', a 'SIGN IN' button, and a 'CLEAR' link. Below these fields, there are two links: 'Forgot username?' (highlighted with a red box) and 'Forgot password?'. The 'New Users' section contains links for 'Self Registration for Cardholders', 'Self Registration for Non Cardholders', and 'Apply for card'. At the bottom of the 'New Users' section is a link for 'Need Assistance?'.</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 header with 'LOGIN /' and 'Forgot Sign On - Username'. Below the header, there are three steps: '1. Select Role.', '2. Enter Details.', and '3. Challenge Question.'. Under '1. Select Role.', there is a prompt 'Select your role.' and two radio button options: 'Cardholder' (with the text 'I have cards linked and this is my only role.') and 'Non Cardholder/Card Applicant' (with the text '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 two buttons: 'CONTINUE' and 'CANCEL'.</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
	<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 – Enter Details Screen</p>  <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><p>Confirmation Message</p></div>	<div><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></div>

Reset Forgotten Password

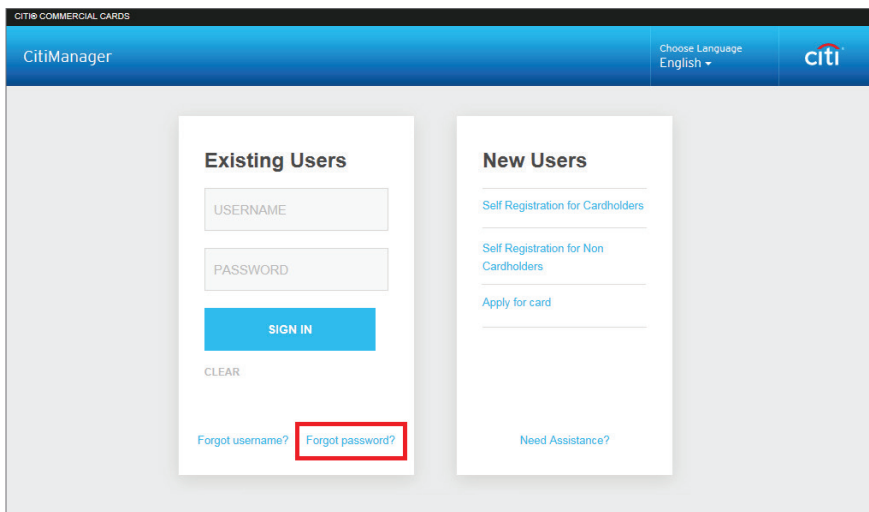
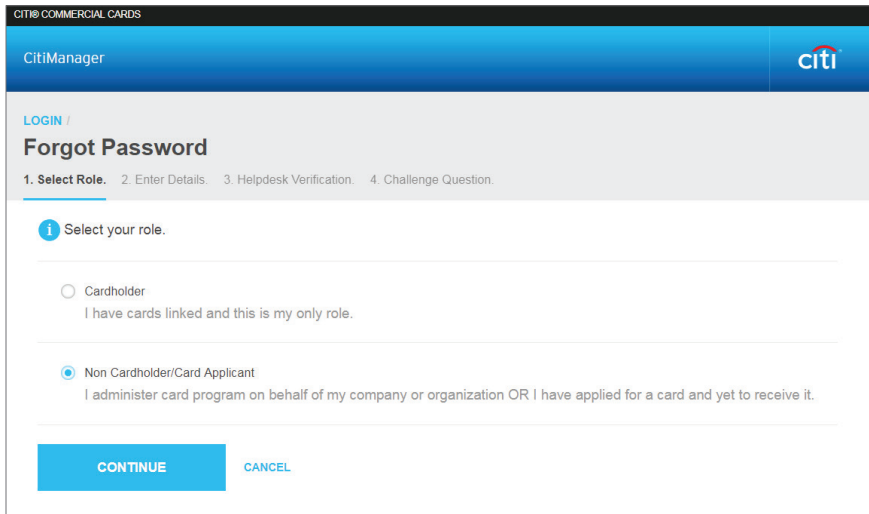
Key Concepts

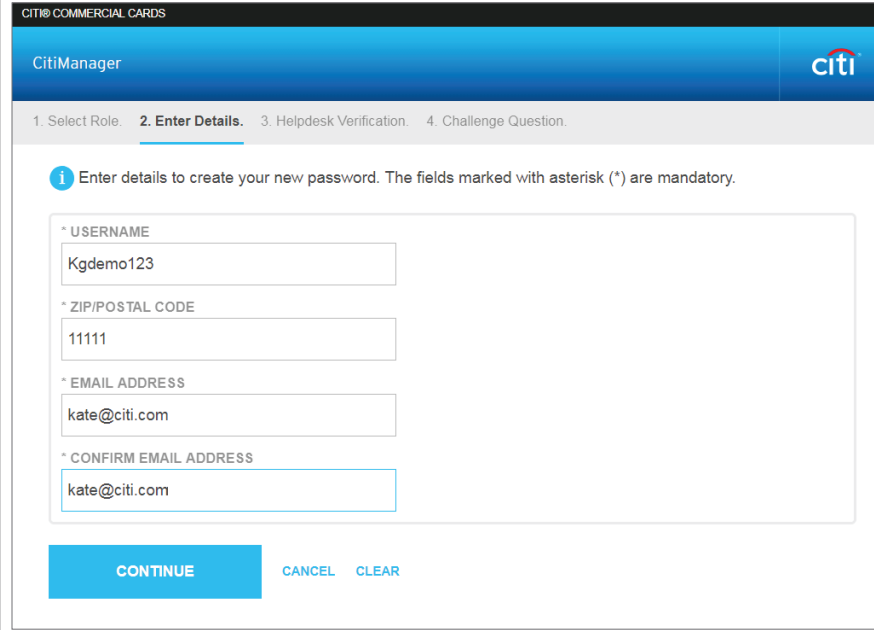
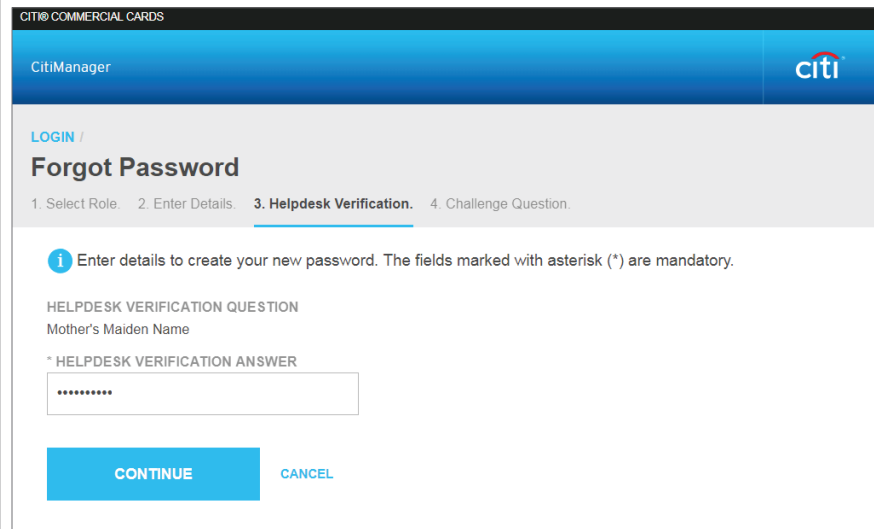
If you forget your password, you will need to reset it in order to sign in to the CitiManager Site.

To reset your password, the following information is required:

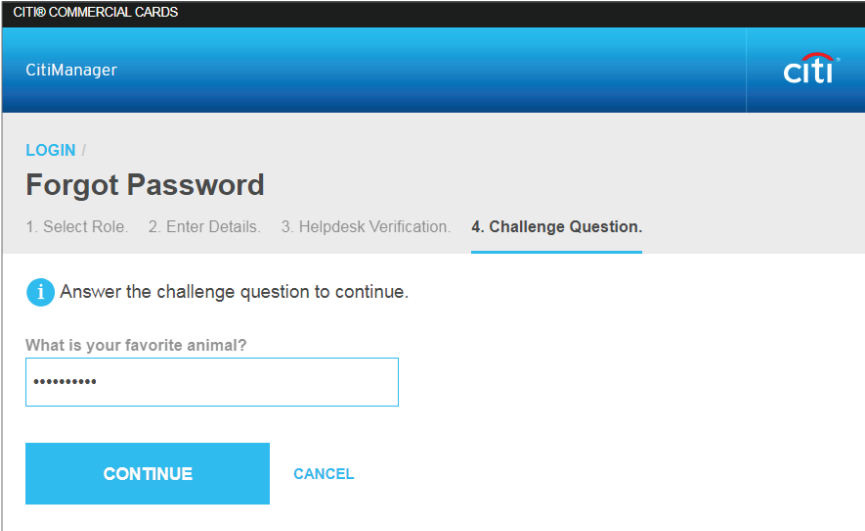
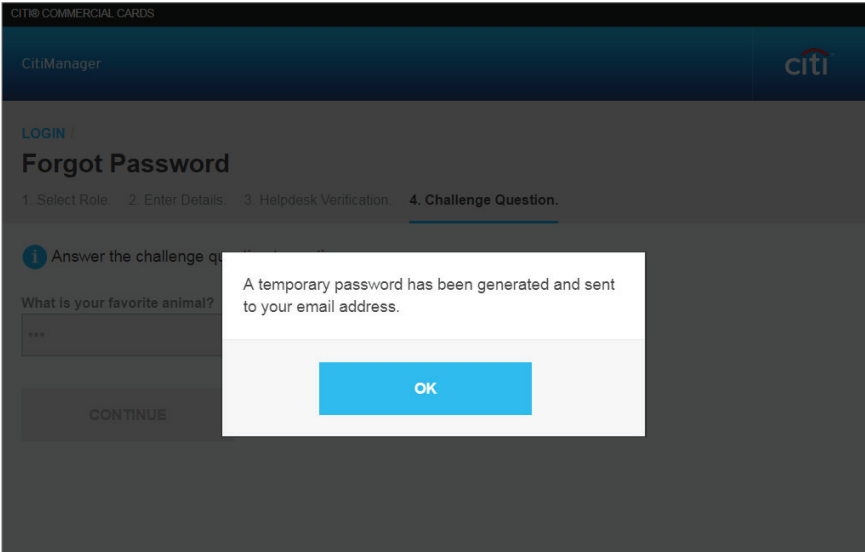
- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Home Screen. It features a blue header with the CitiManager logo 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 IN' button, and a 'CLEAR' link. At the bottom of this section, there are links for 'Forgot username?' and 'Forgot password?'. The 'Forgot password?' link is highlighted with a red rectangle. The 'New Users' section has links for 'Self Registration for Cardholders', 'Self Registration for Non Cardholders', and 'Apply for card'. At the bottom of this section, there is 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. 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 the CitiManager logo. Below the header, there is a 'LOGIN /' link and the title 'Forgot Password'. 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 currently active. Below the progress bar, there is an information icon and the text 'Select your role.'. There are two radio button options: 'Cardholder' with the subtext 'I have cards linked and this is my only role.', and 'Non Cardholder/Card Applicant' with the subtext 'I administer card program on behalf of my company or organization OR I have applied for a card and yet to receive it.'. The 'Non Cardholder/Card Applicant' option is selected. At the bottom, there 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 Password – Enter Details screen displays.</i>

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



Screen	Step/Action
	<p>11. In the challenge question answer field, type the answer to the challenge question and click the Continue button.</p> <p><i>A confirmation message displays indicating a temporary password has been created and sent to your e-mail address.</i></p>
<p>Forgot Password – Challenge Question</p> 	<p>12. Click the OK button.</p> <p><i>The CitiManager Site Login screen displays.</i></p>
<p>Confirmation Message</p>	

