

CitiManager[®] Site User Guide

Non-Cardholder End-to-End User Guide

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Table of Contents

User Guide Overview	2	View Refund History	44
1. Getting Started in the CitiManager Site	3	Search for User and View Details	44
What is CitiManager?	3	Re-send Registration Details	45
Basic Navigation.....	3	Reset a User’s Password.....	46
Choose Your Language	5	Activate/Deactivate User	47
Self-Register as a Non-cardholder	6	Update User – Personal and Contact Details, User Roles, Hierarchy and Entitlements.....	48
Log In to the CitiManager Site.....	7	Assign/Unassign Companies	49
Log Out of the CitiManager Site	8	Print Multiple Statements.....	52
Retrieve Forgotten Username	8	Create User.....	53
Reset Forgotten Password	10	Notify Citi of Lost or Stolen Card	56
View a Different Company.....	11		
2. My Profile	12	4. Manage Card Program	57
My Profile Overview	12	Create New Account Application.....	57
Update Contact Information	12	Run Reports	57
View User Roles and Hierarchy.....	13	Set Passcode and Pre-fill Application Form Data.....	58
View Entitlements.....	14	Transfer Hierarchy (Single and Bulk).....	59
Update User Preferences.....	14	Download/Upload Bulk Online Applications (BOLA)	61
Change Your Password	15	Download/Upload Bulk Online Maintenance (BOLM) Requests	66
Reset Challenge Questions	15	Download/Upload the Supervisor List	71
Merge Usernames.....	16	View Your Hierarchy and Download the Hierarchy From Report	72
Change Primary Company.....	17	View TBR (Total Business Report) Hierarchies In Your Span of Control	73
Link Another Card Account.....	18	Set Alerts for a Specific Hierarchy.....	73
Unlink a Card Account	20		
Apply for a New Card.....	21	5. Resources	75
Set/Remove Out of Offices Backup	22	View and Post Messages.....	75
3. Manage Users	24	Upload and Download Documents Using Library.....	76
View Card Accounts	24	Search for Non-cardholders	77
View Account Communications	25	View Frequently Asked Questions.....	78
View Disputes.....	26	Access Links & Help.....	78
View/Transfer Cardholder Hierarchy	27		
View TBR (Total Business Report) Hierarchy for a Cardholder	28	6. Web Tools	80
Set Alerts for a Cardholder.....	29	Access Web Tools (Transaction Management, Reporting, Expense Management).....	80
View and Download Recent Transactions	31	Access the Learning Center	80
View and Download Statements	32		
View Authorizations.....	34	7. Alerts	82
Dispute a Transaction	35	Set Your Personal Alert Subscriptions	82
View/Upload/Delete Attachments	37	View Alert Audit Log.....	83
Perform Account Maintenance	39	View On-Demand Mobile Alert Commands.....	83
Manage Application and Maintenance Requests (View Requests)	40		

User Guide Overview

Document Scope

The **CitiManager® Site End-to-End User Guide for Non-cardholders** provides detailed step-by-step instructions for all CitiManager Site functions available to Non-cardholders.

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

1. Getting Started in the CitiManager Site

What is CitiManager?

Description

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
- View, approve or reject application and maintenance requests
- Perform account maintenance
- Create users
- Activate and deactivate users
- Assign applications and company
- Set passcodes
- Manage alerts
- Manage your profile
- Access on-demand training resources in the Learning Center

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	Descriptions
<p>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 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 for yourself, set your personal alerts and set a 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	Descriptions
<p>Home Screen</p>	<p>Side Navigation Bar</p> <ol style="list-style-type: none"> 11. Click the Home icon to return to the Home screen. 12. 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. 13. Click the Manage Card Program icon to initiate a new account application, run reports, set passcodes, transfer hierarchies, perform bulk online maintenance, process bulk applications, upload the supervisor list if used by your company and set alerts for your hierarchy. 14. Click the Resources icon to view messages, access FAQs and Links & Help. 15. 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. 16. Click the Alerts icon to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.

Choose Your Language

Key Concepts

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

Step-by-Step Instructions

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

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

Step	Action
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>
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> Note: A link displays at the bottom of the screen for Canadian users directing them to the Canadian Privacy Statement.
6.	In the Username field, type your desired username. Note: The username requirements display in a window as you type. A checkmark displays when each 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. The username requirements display in a window as you type. A checkmark displays when each 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 E-mail 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.	Click the Continue button. <i>The Confirm screen displays.</i>

Step	Action
13.	Review the details and click the Confirm button. <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>
14.	Click the OK button. <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>
15.	Type your username and password and click the Sign In button. <i>The Reset Challenge Questions and Answers screen displays.</i> Note: As an extra security measure, each time you log in, you will be asked to answer one of the challenge questions.
16.	Select and answer three challenge questions.
17.	Click the Save button. <i>The CitiManager Site Home screen displays.</i>

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.

If you need additional information about CitiManager Site self-registration, refer to the **Self-register as a Non-cardholder** topic in this User Guide.

Step-by-Step Instructions

Step	Action
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.

Step	Action
4.	<p>Click the Sign In button.</p> <p><i>The Challenge Question screen displays.</i></p> <p>Note: When you log in to the Citi Manager Site for the first time you must select and answer three challenge questions. Each time you log in, you will be asked to answer one of the challenge questions.</p> <p>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>
5.	<p>Answer the challenge question and click the Continue button.</p> <p><i>The CitiManager Site Home screen displays.</i></p> <p>Note: You have three attempts to answer the challenge question correctly.</p>

Log Out of the CitiManager Site

Key Concepts

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

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

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

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site header, click the Sign Out link.</p> <p><i>The screen refreshes and the CitiManager Site Login screen displays.</i></p>

Retrieve Forgotten Username

Key Concepts

If you forget your username, you will need to retrieve it in order to log in to 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

Step	Action
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 Sign On – Username screen displays.</i>
3.	Select the Non-cardholder/Card Applicant role radio button and click the Continue button. <i>The Enter Details screen displays.</i>
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. Note: Only numeric values are allowed in this field.
8.	In the Zip/Postal code field, type the zip code associated with your user profile.
9.	In the E-mail Address field, type the e-mail address associated with your user profile.
10.	In the Confirm E-mail 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>
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.
13.	Click the OK button. <i>The CitiManager Site Login screen displays and the system sends your username to the e-mail address on file.</i>

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

Step	Action
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>
3.	Select the Non-cardholder/Card Applicant role radio button and click the Continue button. <i>The Forgot Password – Enter Details screen displays.</i>
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 E-mail Address field, type the e-mail address associated with your user profile.
7.	In the Confirm E-mail Address field, re-type the e-mail address associated with your user profile.
8.	To validate the information entered, click the Continue button. <i>The Forgot Password – Helpdesk Verification screen displays.</i>
9.	In the Helpdesk Verification Answer field, type the answer to the verification question and click the Continue button. <i>The Forgot Password – Challenge Question screen displays.</i>
10.	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>
11.	Click the OK button. <i>The CitiManager Site Login screen displays.</i>

View a Different Company

Key Concepts

As a Non-cardholder, you may have access to accounts in different companies if your organization has more than one. For example, you may manage multiple travel programs or a travel program and a purchase program. Each Level 1 Hierarchy entity is referred to as a separate company.

When logging in to the CitiManager Site, your view defaults to a company which has been set as your primary company.

You can use the **Company** drop-down list that displays in the header of any CitiManager Site screen to toggle between them. If the **Company** drop-down list is not available, you only have access to one company.

To change the company that displays as the default, refer to the **Change Primary Company** topic in this User Guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the Company drop-down arrow and select the desired company name. <i>The company name displayed in the header changes to the one selected.</i>

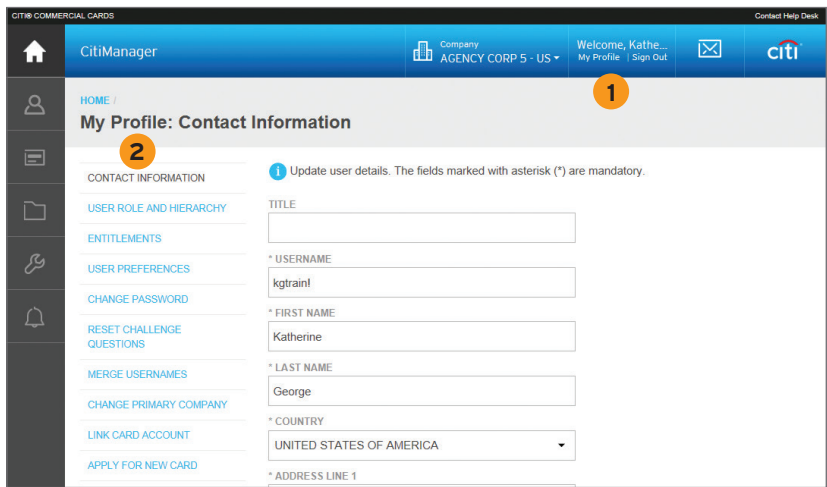
2. My Profile

My Profile Overview

Description

The **My Profile** screen is used to access links that are used to maintain your profile information depending on your entitlements and company's setup:

- View and update CitiManager Site contact details
- View user role, hierarchy and entitlements
- View user preferences
- Change password
- Reset challenge questions
- Merge usernames
- Change your primary company
- Link card account
- Apply for new card
- Set out of office

Screen	Descriptions
 <p>My Profile Screen</p>	<ol style="list-style-type: none"> 1. Click the My Profile link from the header to access links used to view and maintain profile information. 2. Click the links that display on the left side of the screen to view and maintain profile information.

Update Contact Information

Key Concepts

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

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

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Update the necessary contact details associated with your CitiManager Site profile. Note: An asterisk (*) indicates a required field.
3.	When you are finished, scroll to the bottom of the screen and click the Save Changes button. <i>A confirmation message displays at the top of the screen.</i>

View User Roles and Hierarchy

Key Concepts

Each user is assigned a specific hierarchy which defines what information they can access in the CitiManager Site.

Users are also assigned user roles which identify which functions the user can perform in CitiManager.

In some instances, users are assigned more than one role in the CitiManager Site. For example, you may have Cardholder, Non-cardholder (Program Administrator) or Help Desk access.

You can only view the roles and hierarchies you have been assigned. Any changes must be completed by another administrator.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the User Role and Hierarchy link. <i>The User Role and Hierarchy screen displays. The roles and hierarchies you have been assigned display.</i>
3.	Click the (+) plus sign icon to expand the hierarchy tree as necessary. <i>The hierarchy tree expands.</i>

View Entitlements

Key Concepts

CitiManager is an entitlement-based application. Entitlements define which features and functions users have access to in the CitiManager Site.

You can view the entitlements and tools assigned to you based on your role. Changes to your entitlements must be completed by another administrator.

Examples of entitlements that may be assigned to you include:

- Card maintenance
- Activate/deactivate users
- View authorizations
- Approve requests
- Pending user requests
- Update user
- Manage alerts

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the Entitlements link. <i>The Entitlements screen displays. All the entitlements you have been assigned display.</i> Note: If you have access to more than one tool, you can select it from the Application drop-down list.

Update User Preferences

Key Concepts

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

- Help Desk verification question and answer
- The default language in which the CitiManager Site displays
- Hierarchy Sorting (Unit name or number)
- Date Format
- Time Format
- Time Zone
- Currency Format

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>

Step	Action
2.	Click the User Preferences link. <i>The User Preferences screen displays.</i>
3.	Make any necessary changes to your user preferences. Note: An asterisk (*) indicates a required field.
4.	When you are finished, click the Save Changes button. <i>A confirmation message displays at the top of the screen.</i>

Change Your Password

Key Concepts

CitiManager Site passwords remain active for 90 days. You will be prompted to change your password 15 days prior to the expiration date.

If you feel your password has been compromised or at any time you need to change your password, you can use the Change Password function from **My Profile**.

Step-by-Step Instructions

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

Reset Challenge Questions

Key Concepts

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

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

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

Step-by-Step Instructions

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

Merge Usernames

Key Concepts

As a CitiManager Site user you may have more than one username based on your role or responsibilities. For example, you may have a Non-cardholder username and a Cardholder username. If this is the case, you can merge the Cardholder username with your Non-Cardholder username, eliminating the need to log in separately to each account and manage each separately. After the merge is complete, the alternate username will be deactivated.

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

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

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

Step-by-Step Instructions

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

Change Primary Company

Key Concepts

As a Non-cardholder, you may have access to accounts in different companies if your organization has more than one. For example, you may manage multiple travel programs or a travel program and a purchase program. Each Level 1 Hierarchy entity is referred to as a separate company.

When logging in to the CitiManager Site, your view defaults to one of those accounts which have been set as your primary company.

While you can toggle between companies using the drop-down list that displays in the header of the CitiManager Site, you can also change the default so when you log in to the CitiManager Site the preferred company displays by default.

You cannot change your primary company if only one company is assigned to you.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the Change Primary Company link. <i>A list of companies managed by you displays.</i>
3.	Select the radio button for the company you wish to set as your default.
4.	Click the Save button. <i>The default company is saved and a confirmation message displays at the top of the screen.</i>

Link Another Card Account

Key Concepts

If you already have a valid CitiManager Site login for an existing card account, you can activate additional card accounts without creating another login, username and password. You can only link your own account, not a Cardholder's.

There are two possible self-registration options. The option used is based on your company's setup. You will use one of the following options:

- **Registration ID and Passcode** – If your company uses this option, Citi will send two e-mails once a transaction has posted to your account. You will receive 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.
- **Card Details** – Use the details from your card account. You will need your card number, account name and address. The account name, address and zip code must match what appears on your billing statement exactly.

Depending on your company's setup, these options may not display and the **Enter Your Card Information** screen automatically displays.

If you need to unlink an account, you must toggle to your Cardholder account and unlink it from **My Profile**. Refer to the **Unlink a Card Account** topic in this User Guide.

Step-by-Step Instructions

Link a Card Account Using a Registration ID and Passcode

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the Link Card Account link. <i>The Link Card Account screen displays.</i>
3.	Select the Registration ID/Passcode radio button and click the Continue button. <i>The Registration ID/Passcode screen displays.</i>

Step	Action
4.	In the Registration ID field, type the Registration ID sent in the e-mail sent from Citi.
5.	In the Registration Passcode field, type the Registration Passcode sent in the e-mail from Citi.
6.	Click the Continue button. <i>The Sign-on details screen displays.</i> Note: A link displays at the bottom of the screen for Canadian users directing them to the Canadian Privacy Statement.
7.	In the Username field, type a username that meets the requirements. Note: The username requirements display in a window as you type. A checkmark displays when each requirement is fulfilled.
8.	In the Password field, type a password that meets the password requirements. Note: The password requirements display in a window as you type. A checkmark displays when each requirement is fulfilled.
9.	In the Confirm password field, re-type the password.
10.	In the Contact details section verify that the information is correct and make any necessary changes. Note: An asterisk (*) indicates a required field.
11.	From the Helpdesk verification question drop-down list, select a verification question. Note: This question/answer will be used as an additional layer of security when you call Citi.
12.	In the Helpdesk verification answer field, type an answer to the Helpdesk verification question you selected.
13.	Click the Continue button. <i>The Challenge Question screen displays.</i>
14.	Choose three challenge questions and type an answer for each.
15.	Click the Save button. <i>The CitiManager Home screen displays.</i>

Link a Card Account Using Card Details

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the Link Card Account link. <i>The Link Card Account screen displays.</i>
3.	Select the Enter Your Card Information radio button and click the Continue button. <i>The Enter Your Card Information screen displays.</i>
4.	From the Card Details section, in the Card Number field, type your card number exactly as it appears on your billing statement, no spaces or dashes.

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

Unlink a Card Account

Key Concepts

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

You must unlink the card account from your Cardholder role.

Step-by-Step Instructions

Step	Action
1.	From the role drop-down list that displays in the upper-right hand corner of the screen, select your Cardholder role. <i>A confirmation message displays confirming you want to switch roles.</i>
2.	Click the OK button. <i>The CitiManager Site refreshes and you are logged in to your Cardholder account.</i>
3.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
4.	Click the Link/Unlink Card Account link. <i>The Card Details screen displays.</i>
5.	Select the radio button for card number you wish to remove from your user profile.
6.	Click the Unlink Card Account link. <i>The confirmation screen displays.</i>
7.	Verify you have selected the correct account and click the Confirm button. <i>A confirmation message displays at the top of the screen.</i>

Apply for a New Card

Key Concepts

Before you can apply for a new card, an Invitation Passcode and the Inviter's E-mail address are required. Both are obtained from your administrator.

You will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Non-cardholder.

Once your card application is approved, the account will be linked to your CitiManager Site username and password that were created during the application process.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i> Note: You can also click the Apply for New Card link that displays on the CitiManager Home Screen. If you click this link, proceed to Step 4.
2.	Click the Apply for New Card link. <i>The Apply for New Card screen displays.</i>
3.	Click the Begin button. <i>The Apply for New Card – Passcode Verification screen displays.</i>
4.	In the Invitation Passcode field, type the Invitation Passcode that was sent to you by your administrator.
5.	In the Invitation E-mail Address field, type the inviter's e-mail address that was sent to you by your administrator.
6.	Click the Continue button. <i>The Country screen displays.</i>
7.	Select the country of the currency where the card will be billed from the drop-down list. Note: The countries displayed from the drop-down list are based on your company's setup.
8.	Click the Continue button. <i>The card application form displays.</i>
9.	Complete the required fields on the application. Note: If you are unable to complete the required fields, you can also save the application as a draft and return to it later.
10.	Click the Submit button. <i>A confirmation message displays at the top of the screen indicating the application has been submitted for processing.</i>

Set/Remove Out of Offices Backup

Key Concepts

When you are scheduled to be out of the office for a period of time, it is possible assign someone to act as your backup for a specified timeframe. When the out of office feature is turned on, all CitiManager Site-generated e-mails, for example, application and maintenance requests, will be sent to the selected backup. When you no longer require a backup, you can remove them manually or they will be removed automatically after a specified date.

It is possible to have more than one backup setup, but they cannot be set up for the same date range.

The backup you select must be a Non-cardholder and they must be assigned to your hierarchy at the same level or above. They must also have the entitlement to approve requests.

Step-by-Step Instructions

Set an Out of Office Backup

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the Set Out of Office link. <i>The Set Out of Office screen displays.</i>
3.	Click the Select Backup button. <i>The Select Backup Program Administrator search screen displays.</i> Note: If a backup was previously assigned, their information displays.
4.	To search for the person who you wish to assign as your backup, type your search criteria and click the Search button. Note: You can search by Last Name , First Name or Username . To search for users in a specific hierarchy, 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. <i>The search results display at the bottom of the screen.</i>
5.	From the Username column, click the link for the Non-cardholder you wish to assign as your backup. <i>The Set Out of Office from/to date screen displays.</i>
6.	In the From Date and To Date fields, select the timeframe you wish to assign your backup and click the Set Out of Office button. Note: The start date of the out of office cannot be set more than 90 days from today's date. <i>The screen refreshes and the name of the backup assigned and the date range selected displays.</i>

Remove Out of Office Backup

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The Contact Information screen displays.</i>
2.	Click the Set Out of Office link. <i>The Backup PA Details screen displays the current out of office information.</i> Note: The information displayed includes the Full Name , Hierarchy name , Role and the User Profile E-mails Address of the backup and the date range that was set.
3.	Click the Remove Current Out of Office button. <i>The screen refreshes and a confirmation message displays at the top of the screen.</i> <i>The out of office assignment is removed.</i>

3. Manage Users

View Card Accounts

Key Concepts

You can search for Cardholder accounts that reside in your assigned hierarchies. Non-cardholders can only access accounts within their span of control.

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

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

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<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>
3.	<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>
4.	<p>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 (account communications), 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 Account Communications

Key Concepts

You can view account communication documents such as a guide to benefits that may be included as a Cardholder mailing insert.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<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>
3.	<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>
4.	<p>From the right-side of the screen, click the View Account Information link.</p> <p><i>The Account Information screen displays a list of documents available.</i></p>
5.	<p>From the Title column, click the link for the communication you would like to view.</p> <p><i>The Collateral download window displays.</i></p>
6.	<p>Click the Download button.</p> <p><i>A message displays indicating the document will be cached to your computer's hard drive.</i></p>
7.	<p>Click the OK button.</p> <p><i>The browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i></p>
8.	<p>From the browser document option window, click the Open button.</p> <p><i>The document opens in PDF format or the zip document window displays.</i></p> <p>Note: If the file is zipped, you can open it from the document window. Once the document is open, you can print it by selecting Print from the File menu.</p>

View Disputes

Key Concepts

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

- Transaction Date
- Posting Date
- Transaction Detail
- Dispute Amount/Currency
- Dispute Status
- Dispute Initiation Date
- Disputed by Name
- Reference Number

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<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, Card 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>
3.	<p>From the Card Number column, click the link for the card account with the dispute you wish to view.</p> <p><i>The Card Details screen displays.</i></p>
4.	<p>From the right side of the screen, click the View Disputes link.</p> <p><i>The View Disputes screen displays any disputes associated with the selected card account.</i></p> <p>Note: A message displays if there are no disputes for this account.</p>
5.	<p>To view additional transaction dispute detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.</p> <p><i>The row expands and the dispute initiation date, the name of the person initiating the dispute and reference number display.</i></p>

View/Transfer Cardholder Hierarchy

Key Concepts

You can view the hierarchies assigned to a Cardholder and if necessary transfer the account to another hierarchy.

The following default hierarchy entitlement(s) information displays:

- **Company Name:** Name of the company to which the account belongs
- **Unit Name:** Name of the hierarchy to which the account belongs
- **Unit Number:** Number/node of the hierarchy to which the account belongs
- **Full Hierarchy:** Complete hierarchy to which the account is associated

From the **View Hierarchy** screen you can also transfer the Cardholder's hierarchy. If you need to perform bulk hierarchy transfers, refer to the **Transfer Hierarchy (Single and Bulk)** topic in this User Guide.

You can also download the Hierarchy Form Report which displays hierarchy, form and workflow information.

Step-By-Step Instructions

View Cardholder Hierarchy

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Details link. <i>The Search for Cards screen displays.</i>
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. 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. 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. <i>The search results display at the bottom of the screen.</i> Note: To sort the results by the Card Number , Username , Card Name , Status or Bill Type columns, click the column header name.
3.	From the Card Number column, click the link for the card account you wish to view. 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. <i>The Card Details screen displays.</i>
4.	Click the View Hierarchy link that displays on the right-side of the screen. <i>The View Hierarchy screen displays.</i>
5.	To expand the view of this card account's sub-hierarchies, click the (+) plus sign icon to expand the hierarchy.

Step	Action
6.	<p>To transfer the Cardholder's hierarchy:</p> <ul style="list-style-type: none"> a) Click the Transfer Hierarchies link. <i>The Transfer Hierarchies screen displays.</i> b) Select the radio button for the hierarchy where the Cardholder will be transferred and click the Transfer Hierarchy button. <i>A confirmation message displays.</i> c) Click the OK button. <i>The Transfer Hierarchy History screen displays.</i>
7.	<p>To download the Hierarchy Form Report:</p> <ul style="list-style-type: none"> a) Click the Hierarchy Form Report button. <i>The download window opens.</i> b) Click the Download button. <i>A message displays indicating the report may be cached to your computer's hard drive.</i> c) Click the OK button. <i>The browser options window displays.</i> d) Either open or save the report.

View TBR (Total Business Report) Hierarchy for a Cardholder

Key Concepts

You can view TBR (Total Business Report) hierarchies assigned to a Cardholder.

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<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>

Step	Action
3.	<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>
4.	<p>Click the View TBR Hierarchy link that displays on the right-side of the screen.</p> <p><i>The View TBR Hierarchy screen displays the Company Name, Unit Name, Unit Number and Full Hierarchy.</i></p>

Set Alerts for a Cardholder

Key Concepts

As a Non-cardholder you can set and update alerts received by a Cardholder via e-mail and/or to their mobile device when certain selected activity occurs to the account, for example, when statements are available or when payments are received.

There are two types of alerts to which Cardholders can be subscribed to:

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

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

- Time zone
- Time of day
- Days of week

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<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>

Step	Action
3.	<p>From the Card Number column, click the link for the card account you wish to view.</p> <p>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> <p><i>The Card Details screen displays.</i></p>
4.	<p>Click the Update Alerts link that displays on the right-side of the screen.</p> <p><i>The Update Alerts screen displays.</i></p>
5.	<p>To enter/edit the e-mail address(s) where alerts will be sent, click the E-mail Addresses – Edit link and complete the following steps when the E-mail Address Preferences window opens:</p> <ol style="list-style-type: none"> Type and confirm up to five e-mail addresses. Click the Save button.
6.	<p>To enter/edit the mobile phone number(s) where alerts will be sent, click the Mobile Phone Number – Edit link and complete the following steps when the E-mail Address Preferences window opens:</p> <ol style="list-style-type: none"> In the Country Code and Mobile Number field, type a valid mobile phone number where you wish alerts to be sent. <p>Note: Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile.</p> Click in the Supported Carriers field and select the mobile carrier. <p>Note: If Sprint is the carrier, the Cardholder is automatically enrolled in this subscription notification. This is a requirement of Sprint. Canadian users are automatically enrolled in this subscription due to regulations in Canada.</p> Click in the Preferred Time Zone field and select the preferred time zone. Click in the From and To fields and select the time-frame in which the Cardholder would like to receive alerts. From the list of weekdays, select the days the Cardholder would like to receive alerts. Click the Save button.
7.	<p>To subscribe to alerts, select the E-mail Alerts and/or SMS (Mobile Alerts) checkbox(es) for each of the alerts the Cardholder will receive.</p> <p>To unsubscribe to alerts, deselect the E-mail Alerts and/or SMS (Mobile Alerts) checkbox(es) for the alerts the Cardholder will no longer receive.</p> <p>Note: Some alerts may be greyed out and unavailable. Alerts that are selected and greyed out are mandatory.</p> <p>For more information about each alert, click the information icon next to the alert name.</p> <p>Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the Available Credit Remaining % alert, you must select the desired Available Credit Remaining %. When the selected percent of remaining credit level is met, you will receive an alert.</p>
8.	<p>When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox.</p> <p>Note: If you do not agree to the terms and conditions, you will not be able to receive alerts.</p>
9.	<p>Click the Save button.</p> <p><i>The alerts settings are saved and a confirmation message displays at the top of the screen.</i></p>

View and Download Recent Transactions

Key Concepts

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

The **Recent Activity** screen displays a snapshot of balances, payments posted, pending authorizations and due dates. A list of recent transactions also displays 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

View Recent Transactions

Step	Action
1.	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>
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. 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. 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. <i>The search results display at the bottom of the screen.</i> Note: To sort the results by the Card Number , Username , Card Name , or Status columns, click the column header name.
3.	From the Card Number column, click the link for the card account you wish to view. <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>
4.	From the Statements section, click the Recent icon. <i>The Statements screen displays. A snapshot of the credit limits, balances and payments display at the top of the screen. Recent transactions display at the bottom of the screen.</i>
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 Recent Transactions section and click the Search icon. Click the Advanced Search link to access additional search criteria. <i>The transactions are filtered by the search criteria entered.</i>

Step	Action
6.	<p>To view additional transaction detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.</p> <p><i>The row expands and additional transaction detail displays.</i></p> <p>Note: The Dispute button displays when the row is expanded. For additional information about disputes refer to the Dispute Transactions topic in this User Guide. The Attach button also displays. For additional information about attaching documents, refer to the View/Upload/Delete Attachments topic in this User Guide.</p>
7.	<p>To view authorizations, scroll to the bottom of the screen and click the View Authorizations link.</p> <p><i>The View authorizations screen displays transactions and their status, including declined and pending.</i></p> <p>Note: If the transaction was declined, from the Status column, click the Decline link to view additional information about the decline.</p>

Download Recent Transactions

Step	Action
1.	<p>From the Statements screen, click the Download link that displays above the Recent Activity header.</p> <p><i>The download options display in a new window.</i></p>
2.	<p>Select the radio button for the desired download format and click the Download button.</p> <p>Note: The download options are Comma Separated Value (CSV) or Excel (XLS). Excel is the default option. If you intend to print your statement, Excel is the recommended format.</p> <p><i>A download message displays indicating a file may be cached to your computer's hard drive.</i></p>
3.	<p>Click the OK button.</p> <p><i>A message displays at the top of the screen indicating your document is ready for download and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i></p>
4.	<p>From the browser document option window, click the Open button.</p> <p><i>The document opens in the selected format.</i></p> <p>Note: Once the document is open, you can print it by selecting Print from the File menu.</p>

View and Download Statements

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 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

View Statements and Transactions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<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>
3.	<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>
4.	<p>From the Statements section, click the icon for the statement date you wish to view.</p> <p><i>The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.</i></p>
5.	<p>To search for a specific transaction amount, date or description, type the search criteria in search field that displays in the upper-right corner of the Billed Transactions section and click the Search icon. Click the Advanced Search link to access additional search criteria.</p> <p><i>The transactions are filtered by the search criteria entered.</i></p>
6.	<p>To view additional transaction detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.</p> <p><i>The row expands and additional transaction detail displays.</i></p> <p>Note: The Dispute button displays when the row is expanded. For additional information about disputes refer to the Dispute Transactions topic in this User Guide. The Attach button also displays. For additional information about attaching documents, refer to the View/Upload/Delete Attachments topic in this User Guide.</p>

Download Statements

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

View Authorizations

Key Concepts

You can view the previous ten days of authorization and decline information in real-time for card accounts that reside in your hierarchies. You can view the authorization date, detail, Merchant Category Code (MCC), transaction amount and status.

For declines you can also view the **Additional Information** screen, which displays the merchant name and the decline reason code and description.

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<p>To narrow your 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, Status, 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>

Step	Action
3.	From the Card Number column, click the link for the card account you wish to view. <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>
4.	From the Statements section, click the Recent icon. <i>The Statements screen displays. A snapshot of the credit limits, balances and payments display at the top of the screen. Recent transactions display at the bottom of the screen.</i>
5.	To view authorizations, scroll to the bottom of the screen and click the View Authorizations link. <i>The View Authorizations screen displays transactions and their status.</i>
6.	If the transaction was declined, from the Status column, click the Decline link to view additional information about the decline. <i>The Additional Information screen displays the decline reason code and description.</i>

Dispute a Transaction

Key Concepts

It is possible to dispute a transaction if necessary such as when there are duplicate charges or when there is a hotel cancellation.

You can initiate disputes for either recent or billed transactions. A disputed transaction must be submitted within 60 days of when the transaction is posted to the account's billing statement.

Multiple transactions are not allowed to be disputed at the same time. Only one dispute per card account is allowed at a time.

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

Note: The steps in the procedure describe how to dispute a billed transaction from the **Statements** screen. The procedure is the same for recent transactions.

Step-By-Step Instructions

Step	Action
1.	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>
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. 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. 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. <i>The search results display at the bottom of the screen.</i> Note: To sort the results by the Card Number , Username , Card Name , Status or Bill Type columns, click the column header name.

Step	Action
3.	<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>
4.	<p>From the Statements section, click the icon for the statement date you wish to view. You can choose to view recent transactions or billed transactions for a particular statement date.</p> <p><i>The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.</i></p>
5.	<p>To search for a specific transaction amount, date or description, type the search criteria in search field that displays in the upper-right corner of the Billed Transactions section and click the Search button. Click the Advanced Search link to access additional search criteria.</p> <p><i>The transactions are filtered by the search criteria entered.</i></p>
6.	<p>To initiate a dispute for a transaction, click the ellipsis (...) link that displays on the right-side of the transaction row you wish to expand.</p> <p><i>The row expands and additional transaction detail and Attach and Dispute buttons display.</i></p>
7.	<p>From the expanded row, click the Dispute button.</p> <p><i>The Dispute Transactions – Dispute Details screen displays. If the transaction selected does not fulfil the dispute rules a message displays indicating you should contact Customer Service for assistance.</i></p> <p>Note: Multiple transactions are not allowed to be disputed at the same time.</p> <p>You can also click the Attach button to view documents related to the transaction that have already been uploaded such as receipts. You can also upload or delete documents. For additional information about attaching documents, refer to the View/Upload/Delete Attachments topic in this user guide.</p>
8.	<p>From the Dispute Reason section, select the dispute reason from the drop-down list.</p> <p>Note: You must select a dispute reason to continue. Only one reason can be selected. Depending on the dispute reason selected, you may be required to provide additional information such as an amount.</p>
9.	<p>Based on the dispute reason selected, complete any additional fields requesting additional information such as an amount.</p>
10.	<p>When you are finished, select the verification checkbox to certify the information provided is accurate.</p>
11.	<p>Click the Continue button to validate your dispute.</p> <p><i>If the validation is successful, the Dispute Transactions – Review screen displays.</i></p> <p>Note: If the validation fails, the "Please fill out the required fields for the dispute reason selected. If unable to provide detail required, please contact Customer Service to initiate a dispute." message displays.</p>

Step	Action
12.	<p>Review the dispute details, reason code and additional information and click the Submit button.</p> <p><i>The Dispute Transactions – Confirmation screen displays indicating if the dispute was successfully initiated.</i></p>
13.	<p>If the dispute reason you selected indicated a requirement to fax or mail additional dispute information, click the Download Dispute form button and follow the instructions on the form.</p> <p>Note: To return to the statement, click the Return to Statement/Unbilled Transaction link.</p>

View/Upload/Delete Attachments

Key Concepts

It's possible to view documents that have been attached to a transaction such as receipts. You can also upload or delete attachments.

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

The following file types are supported:

- .jpg
- jpeg
- .png
- PDF

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link.</p> <p><i>The Search for Cards screen displays.</i></p>
2.	<p>To narrow your 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>
3.	<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>

Step	Action
4.	<p>From the Statements section, click the icon for the statement date you wish to view. You can choose to view recent transactions or billed transactions for a particular statement date.</p> <p><i>The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.</i></p>
5.	<p>To search for a specific transaction amount, date or description, type the search criteria in search field that displays in the upper-right corner of the Billed Transactions section and click the Search button. Click the Advanced Search link to access additional search criteria.</p> <p><i>The transactions are filtered by the search criteria entered.</i></p>
6.	<p>To a view, upload or delete an attachment for a transaction, click the ellipsis (...) link that displays on the right-side of the transaction you wish to expand.</p> <p><i>The row expands and additional transaction detail and Attach and Dispute buttons display.</i></p>
7.	<p>From the expanded row, click the Attach button.</p> <p><i>The Attachments screen displays. The transaction details display at the top of the screen and a list of documents already attached displays at the bottom.</i></p>
8.	<p>To view an attachment:</p> <ol style="list-style-type: none"> From the File Name column, click the link for the document you wish to open. <i>The attachment opens.</i> <p>To delete a document:</p> <ol style="list-style-type: none"> From the Actions column, click the Delete link for the document you wish to delete. <i>A confirmation message displays.</i> Click the OK button. <i>The document is deleted.</i> <p>To upload an attachment:</p> <ol style="list-style-type: none"> From the Actions column, click the Upload link. Note: If there are already five attachments, you will not be able to upload an additional one unless an already uploaded document is deleted first. <i>The upload window displays.</i> Click the Choose File button and navigate to the desired document. Select the document file and click the Upload button. <i>The file is uploaded and displays in the Attachments list.</i> <p>To delete an attachment:</p> <ol style="list-style-type: none"> From the Actions column, click the Delete link for the attachment you wish to delete. <i>A confirmation message displays confirming you want to delete the attachment.</i> Click the Delete button. <i>A confirmation message displays.</i> <p>To view the Deleted File Log:</p> <ol style="list-style-type: none"> Click the Deleted File Log link that displays at the bottom of the screen. <i>The log opens displaying the name of the attachments deleted, the date they were deleted and who deleted them.</i>

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.

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

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Account Maintenance link.</p> <p><i>The Account Maintenance – Search screen displays.</i></p>
2.	<p>To perform a search, type the desired search criteria in Account Number, First Name, Last Name or Username fields and click the Search button.</p> <p>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>
3.	<p>Select the radio button for the account you wish to maintain and click the Update Account button.</p> <p><i>The Form Details screen displays.</i></p>

Step	Action
4.	<p>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. Select or deselect the checkbox(es) 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>
5.	<p>When you are finished, click the Submit button.</p> <p><i>A confirmation message displays based on the maintenance performed.</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	Request was sent back by the approver requesting additional information.
Processed	Request was processed and a card will be issued.

Request Status	Description
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

View/Approve/Reject a Request

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the View Requests link,</p> <p>OR</p> <p>From the CitiManager Site Home screen Application Request or Maintenance Request sections, click desired Request ID link and continue to Step 5.</p>
2.	<p>To perform a search, type the desired search criteria in the Request ID, First Name or Last Number 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 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.</i></p> <p>Note: To sort the results by the Request ID, Name, Status or Request Type columns, click the column header name.</p>
3.	<p>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>
4.	<p>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>
5.	Review the request details.

Step	Action
6.	<p>When you are finished reviewing the request, select either the Approve or Reject radio button.</p> <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>
7.	<p>When you are finished, click the Submit button.</p> <p><i>A confirmation message displays.</i></p>

View the Maintenance Audit Log

Step	Action
1.	<p>From the View Request screen, click the View Audit link displayed on the right-side of the screen.</p> <p>Note: To navigate to the View Request screen, refer to Steps 1-4 of the View/Approve/Reject a Request topic.</p> <p><i>The View Audit screen displays the date and time of the change, who made the change, which field was changed, the old value and the new value.</i></p>
2.	<p>To navigate back to the request, click the Back button.</p>

Download Applications

Step	Action
1.	<p>From the View Request screen, click the Download link displayed on the right-side of the screen.</p> <p>Note: To navigate to the View Request screen, refer to Steps 1-4 of the View/Approve/Reject a Request topic.</p> <p><i>A message displays indicating the download file may have been cached locally to your computer.</i></p>
2.	<p>Click the OK button.</p> <p><i>The browser document options window displays. The location of the Save or Open options vary based on your browser settings.</i></p>
3.	<p>From the browser document option window, click the Open button.</p> <p><i>The document opens in the selected format.</i></p> <p>Note: Once the document is open, you can print it by selecting Print from the File menu.</p>

Override an Approval

Step	Action
1.	<p>From the View Request screen, click the Override Approval link displayed on the right-side of the screen.</p> <p>Note: To navigate to the View Request screen, refer to Steps 1-4 of the View/Approve/Reject a Request topic.</p> <p><i>The Override Approval screen displays the request details.</i></p>

Step	Action
2.	Scroll down to the Override Information section and select Reject from the drop-down list.
3.	Type a reason for the override in the Comments field.
4.	By default, the Allow for Resubmit checkbox is selected. De-select the checkbox if resubmission is not allowed.
5.	Click the Submit button. <i>A confirmation message displays.</i>
6.	Click the OK button. <i>A confirmation message displays indicating the override has been submitted successfully.</i>
7.	Click the OK button. <i>The search screen displays.</i>

Delete Application Request

Note: This function is only available if you have been entitled to delete application requests.

Step	Action
1.	From the View Request screen, click the Delete Application Request link displayed on the right-side of the screen. Note: To navigate to the View Request screen, refer to Steps 1-4 of the View/Approve/Reject a Request topic. <i>The comments window displays.</i>
2.	In the comments field, type a reason for deleting the request and click the Confirm button. Note: You must enter comments in order to delete the request. There is a 2000 character limit. <i>A confirmation message displays and the request is deleted. No e-mail or SMS message will be sent to acknowledge the deletion of the online application.</i>

View Refund History

Key Concepts

You can view the following information for Cardholder credit balance refund requests:

- Requested Amount
- Requested Date
- Current Balance
- Status
- Request Type

There are many qualifiers that may prevent a Cardholder from requesting a refund:

- Their payment history is not in good standing.
- There is no credit balance.
- There was a personal payment or previous online request within ten business days. The cardholder will need to wait ten business days or call the 24-hour Customer Service Center at the number on the back of their card to inquire or complete the request.
- If a cardholder has had two or more NSF checks, they cannot request a refund via the Automated Clearing House (ACH) process.

Step-By-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Refund History link. <i>The Refund History – Search screen displays.</i>
2.	To perform a search, type the desired search criteria in the Account Number , First Name or Last Name or Username fields and click the Search button. 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. <i>The search results display at the bottom of the screen.</i>
3.	From the Account Number column, click the link for the card account you wish to view. <i>The Refund History screen displays.</i>

Search for User and View Details

Key Concepts

You can search for users (Cardholder and Non-cardholder) 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

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link.</p> <p><i>The Search for Users screen displays.</i></p>
2.	<p>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, E-mail 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 E-mail Address columns, click the column header name.</p>
3.	<p>From the Username column, click the link for the user you wish to view.</p> <p><i>The User Details screen displays.</i></p>
4.	<p>As necessary, click the link for the desired function that displays on the right side of the screen.</p> <p>Note: For additional information about the functions available from the User Details screen, refer to the appropriate topic in this User Guide.</p>

Re-send Registration Details

Key Concepts

If a user has not completed the registration process and has a Pending/Unregistered status, you can re-send the registration details to them.

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over Manage Users icon and click the User Search link.</p> <p><i>The Search for Users screen displays.</i></p>
2.	<p>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, E-mail 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 E-mail Address columns, click the column header name.</p>

Step	Action
3.	From the Username column, click the Unregistered link for the user you wish to re-send the registration details. <i>The Reset Registration Details window displays</i>
4.	Either keep the default e-mail address, or select the Alternate Email Address radio button and type another e-mail address.
5.	Click the Save button. <i>A confirmation message displays at the top of the screen.</i>

Reset a User's Password

Key Concepts

You can initiate a password reset for a user's profile. Once you initiate the reset process, an automated message is sent to the e-mail associated with the profile that will allow the user to reset their password.

Step-By-Step Instructions

Step	Action
1.	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>
2.	To narrow your search, type the desired search criteria in the First Name , Last Name or Username fields and click the Search button. Note: To perform an advanced search using the Card Number , Company Name , E-mail Address , Employee ID and Status fields, click the More Options button. 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. <i>The search results display at the bottom of the screen.</i> Note: To sort the results by the Username , Full Name or E-mail Address columns, click the column header name.
3.	From the Username column, click the link for the user you wish to view. <i>The User Details screen displays.</i>
4.	From the right-side of the User Details screen, click the Reset Password link. <i>A confirmation message displays verifying you want to reset the password for that user.</i>
5.	Click the Reset button. <i>A confirmation message displays at the top of the screen. An automated e-mail with the password reset steps will be sent to the e-mail associated with the user's profile.</i>

Activate/Deactivate User

Key Concepts

You can activate an existing username that was deactivated due to lack of use, or manually deactivated by a Non-cardholder.

You can also manually deactivate a user. Usernames automatically deactivate if a user fails to log in for 100 consecutive days. When manually activating or deactivating an account you are required to enter the reason for activating or deactivating the username.

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link.</p> <p><i>The Search for Users screen displays.</i></p>
2.	<p>To narrow your 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, E-mail 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 E-mail Address columns, click the column header name.</p>
3.	<p>From the Username column, click the link for the user you wish to activate or deactivate.</p> <p><i>The User Details screen displays the Card Details, Contact Details, User Role(s) and User Entitlements sections.</i></p>
4.	<p>From the right side of the screen, click the Activate User or Deactivate User link.</p> <p>Name: The name of the link displayed is dependent on the status of the user (active or deactivated).</p> <p><i>The Activate or Deactivate screen displays.</i></p>
5.	<p>In the Reason for activation/deactivation text entry field, type the reason for the activation/deactivation.</p>
6.	<p>Click the Activate or Deactivate button.</p> <p>Note: If the user's current status is Active, the Deactivate button displays. If the user's current status is Inactive, the Activate button displays.</p> <p>The maintenance activity is logged in the Activate/Deactivate history table that displays at the bottom of the screen. Click the Download in CSV Format link to download the history in text format.</p>

Update User – Personal and Contact Details, User Roles, Hierarchy and Entitlements

Key Concepts

It is possible to update a user's personal details, contact details, their roles, hierarchy and the entitlements assigned to them. Details that can be updated include:

- **Personal Details** – Username, first and last name
- **Contact Details** – Address, phone number, e-mail address
- **User Roles and Hierarchy** – Roles such as Cardholder and Non-cardholder and hierarchy assigned to the role.
- **Entitlements** – Entitlements assigned to the user

You can only assign additional entitlements to another user if you are already entitled yourself. You cannot change your own entitlements.

Step-By-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. <i>The Search for Users screen displays.</i>
2.	To narrow a search, type the desired search criteria in the First Name, Last Name or Username fields and click the Search button. Note: To perform an advanced search using the Company Name, Card Number, E-mail Address, Employee ID and Status , click the More Options button. 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. <i>The search results display at the bottom of the screen.</i> Note: To sort the results by the Username, Full Name or Card Name columns, click the column header name.
3.	From the Username column, click the link for the user you wish to update. <i>The User 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>
4.	Click the Update User link that displays on the right-side of the screen. <i>The Update User screen displays the Personal Details, Contact Details, User Role(s) and Hierarchy, and Entitlements.</i>
5.	To change personal details: a) From the Personal Details section header, click the (+) plus sign icon to expand the section. b) Maintain the username and first and last name as necessary.
6.	To change contact details: a) From the Contact Details section header, click the (+) plus sign icon to expand the section. b) Maintain the address, phone numbers and e-mail address as necessary.

Step	Action
7.	<p>To change the user's role or hierarchy:</p> <ol style="list-style-type: none"> From the User Role(s) and Hierarchy section header, click the (+) plus sign icon to expand the section. Click the Change Role link to unlock the role checkboxes and then select/deselect the checkboxes to change the user's role. Click the Set Hierarchy link to update the user's hierarchy. <i>The Set Hierarchy Screen displays.</i> Click the (+) plus sign icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign to the user. When you are finished, click the Select button. <i>The Update User screen displays.</i>
8.	<p>To change the user's entitlements:</p> <ol style="list-style-type: none"> From the Entitlements section header, click the (+) plus sign icon to expand the section. Select or deselect the entitlements you would like to assign or unassign the user.
9.	<p>When you are finished making all changes, click the Continue button that displays at the bottom of the screen. <i>The Confirm Details screen displays.</i></p>
10.	<p>Verify your changes and click the Save button. <i>A confirmation message displays at the top of the screen.</i></p>
11.	<p>Click the OK button. <i>The Search for Users screen displays.</i></p>

Assign/Unassign Companies

Key Concepts

You can assign a user to another company so they can manage accounts that reside in another hierarchy that is not currently attached to their username.

You can only assign companies for existing or pending users and for companies that you are entitled to.

Step-by-Step Instructions

Assign a Company

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. <i>The Search for Users screen displays.</i></p>

Step	Action
2.	<p>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, E-mail Address, Employee ID or Status, 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 E-mail Address columns click the column header name.</p>
3.	<p>From the Username column, click the link for the user you wish to assign a company.</p> <p><i>The User Details screen displays Card Details, Contact Details, User Role(s) and User Entitlements sections.</i></p>
4.	<p>Click the Assign/Unassign Companies link that displays on the right-side of the screen.</p> <p><i>The Assign/Unassign Companies screen displays.</i></p>
5.	<p>Click the Assign Company button.</p> <p><i>The User Role & Hierarchy Assignment screen displays.</i></p>
6.	<p>From the Company, User Role(s) and Hierarchy section drop-down list, select the company you would like to assign this user.</p>
7.	<p>Click the Set Hierarchy link that displays to the right of the drop-down list.</p> <p><i>The Select Hierarchy screen displays.</i></p>
8.	<p>Click the (+) plus sign icon to expand the hierarchy. Click the checkboxes for the hierarchy or hierarchies you wish to assign to the user. When you are finished, click the Select button.</p> <p><i>The Assign Companies screen displays.</i></p>
9.	<p>From the Role column, select the checkbox next to the desired role.</p>
10.	<p>On the far right-side of the Entitlements section header, click the (+) plus sign icon to review and edit entitlements for this user.</p> <p>Note: This section header will not expand until a role is selected.</p>
11.	<p>Select the checkbox for all the entitlements you wish to assign this user for the assigned company.</p> <p>Note: Click the Select All or Deselect All link that displays under the (+) plus sign icon to select all or deselect all entitlements.</p>
12.	<p>Scroll to the bottom of the screen and click the Continue button.</p> <p><i>The Confirm Details screen displays.</i></p>
13.	<p>Review the details screen and scroll to the bottom of the screen and click the Assign Company button to grant this account access to the selected company with the assigned entitlements.</p> <p><i>A confirmation message displays stating that the company is successfully assigned to the user.</i></p>
14.	<p>Click the OK button.</p> <p><i>You are returned to the User Details screen.</i></p>

Unassign a Company

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link.</p> <p><i>The Search for Users screen displays.</i></p>
2.	<p>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, E-mail Address, Employee ID or Status, 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 Card Name columns click the column header name.</p>
3.	<p>From the Username column, click the link for the user you wish to unassign a company.</p> <p><i>The User 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>
4.	<p>Click the Assign/Unassign Companies link that displays on the right-side of the screen.</p> <p><i>The Assign/Unassign Companies screen displays.</i></p>
5.	<p>Select the checkbox next to the company that you wish to unassign this user.</p>
6.	<p>Click the Unassign Company button.</p> <p><i>A confirmation message displays verifying you want to unassign the company.</i></p> <p>Note: If the user only has one company, it cannot be unassigned.</p>
7.	<p>Click the OK button.</p> <p><i>A confirmation message displays indicating the company has been successfully unassigned.</i></p>
8.	<p>Click the OK button.</p> <p><i>You are returned to the User Details screen.</i></p>

Print Multiple Statements

Key Concepts

You can download and print multiple Cardholder statements from previous months. You can download statements for individually or centrally billed accounts.

Once the PDF document is open, you can print it by selecting **Print** from the **File** menu.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Print Multiple Statement link.</p> <p><i>The Search for Statements screen displays.</i></p>
2.	<p>To perform a search, type the desired search criteria in the First Name, Last Name and then From Date and To Date fields and click the Search button.</p> <p>Note: To perform an advanced search using the Card Number, Username, Bill Type, Hierarchy Name or Hierarchy Unit, 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>
3.	<p>Select the checkboxes for the statements you wish to download and click the Download Statements button displayed at the bottom of the screen.</p> <p>It is possible to select up to 2000 transactions for a single download request. You can keep track of how many transactions and statements have been selected by looking to the right of the Download Statements button.</p> <p><i>A message displays indicating the file may be saved to your computer.</i></p>
4.	<p>Click the OK button.</p> <p><i>The browser document options window displays.</i></p>
5.	<p>From the browser document option window, click the Open button.</p> <p><i>The document opens in the PDF format.</i></p> <p>Note: Once the document is open, you can print it by selecting Print from the File menu.</p>

Create User

Key Concepts

Use this procedure to create a new user in the CitiManager Site.

The first part of this procedure only grants login access to the CitiManager Site. If you are creating a CitiManager Site Non-cardholder user who will have Single Sign-On (SSO) access to CitiManager – Expense Management (Expense Management), complete the steps for the **Add CitiManager – Expense Management SSO Access** topic.

Once the new user is created, the Registration ID and Registration Passcode e-mails are sent to the user so they can access the CitiManager Site. The registration details for a new user will expire 60 days from the date they are created. If registration details expire, they can be re-sent rather than creating new ones.

It is possible to select the language in which the registration e-mails will be drafted for the new user. The available languages default based on the country of residence of the new user.

Step-by-Step Instructions

Create User

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click Create User link. <i>The Manage Users screen displays.</i>
2.	Click the Create button. <i>The Create New User screen displays.</i>
3.	If necessary, click the (+) plus sign icon from the Personal Details section header to expand it. In this section, type the user's first and last name in the text entry fields. Note: An asterisk (*) indicates a required field.
4.	If necessary, click the (+) plus sign icon from the Contact Details section header to expand it. In this section, type the required information in the text entry fields or select it from the drop-down list. Note: An asterisk (*) indicates a required field.

Step	Action
5.	<p>If necessary, click the (+) plus sign icon from the Company, User Role(s) and Hierarchy section header to expand it. From this section you can assign a single or multiple companies:</p> <ul style="list-style-type: none"> a) To assign a single company: <ul style="list-style-type: none"> I. Verify the Single company radio button is selected. II. Select the checkbox for the role you are assigning to the user. III. Click the Set Hierarchy link. <i>The Set Hierarchy screen displays a list of available hierarchies. Only hierarchies within your span of control display.</i> IV. Click the (+) plus sign icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign to the user. When you are finished, click the Select button. V. Continue to Step 6. b) To assign multiple companies: <ul style="list-style-type: none"> I. Select the checkbox for the role you are assigning to the user. II. Click the Set Hierarchy link. <i>The Set Hierarchy screen displays a list of available hierarchies. Only hierarchies within your span of control display.</i> III. Click the (+) plus sign icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign to the user. When you are finished, click the Select button. IV. Select the Multiple companies radio button. <i>The Select Multiple Companies screen displays a list of companies within your span of control.</i> V. From the Select the Processor drop-down list, keep the default of All. VI. Select the checkboxes for each of the companies you wish to assign to the user. VII. For each company you selected, click the Set Hierarchy link to assign the hierarchy for each. Click the (+) plus sign icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign the user for the company. When you are finished, click the Select button. Note: You can also click the Set the current hierarchy as the default hierarchy for all selected companies checkbox to grant access to the selected companies at your highest entitlement level. VIII. When you are finished, click the OK button. If you chose to assign the current hierarchy as the default for each, a confirmation message displays. Click the OK button to continue. <i>The Create New User screen displays.</i> IX. Continue to Step 6.
6.	<p>If necessary, click the (+) plus sign icon from the Entitlements section header to expand it. Select/deselect the checkbox for the entitlements you wish to assign/unassign the user.</p>
7.	<p>Click the Continue button. <i>The Confirm Details screen displays.</i></p>

Step	Action
8.	Review and confirm the details for the user and click the Save button. <i>A confirmation message displays at the top of the screen. The Registration ID and Registration Passcode e-mails are sent to the user so they can access the CitiManager Site.</i>
9.	Click the OK button. <i>The Manage Users screen displays.</i>

Add CitiManager - Expense Management SSO Access

If you are creating a CitiManager Site Non-cardholder user with CitiManager – Expense Management SSO access, continue with the following steps.

SSO must be enabled in Expense Management. SSO can only be enabled by Citi. Contact your Citi CAS representative to have SSO enabled for Expense Management.

Step	Action
1.	After creating the user in the CitiManager Site, open the Expense Management application as an authorized Program Administrator. Note: If you do not have the proper Expense Management authority, contact your Company Program Administrator or your Citi CAS representative.
2.	From the Home screen, click the User tab, select User Setup . <i>The Search Reporting Structure screen displays.</i>
3.	In the Search Criteria section, select the role type from the Search By drop-down list and click the Search button. <i>The Citi User and Setup Screen displays.</i>
4.	In the Search By E-mail field, type the e-mail address listed on the user's CitiManager Site profile and click the Search button. <i>Results display for the e-mail address entered.</i> Note: If multiple CitiManager Site profiles exist for the same e-mail address, all profiles will display in the search results.
5.	In the Search Results section, click the desired profile link from the User Name column. <i>The User Information screen displays with the User Name and User ID for the chosen CitiManager ID.</i>
6.	In the User Information section, select the desired template to be used from the Template drop-down list and click the Save button. <i>A confirmation message displays indicating the user was successfully added.</i> Note: The next time the Non-cardholder signs into the CitiManager Site, the Expense Management link will be available from Web Tools . After linking the account, only the Template field can be modified on the GCMS User Information screen.

Notify Citi of Lost or Stolen Card

Key Concepts

The CitiManager Site is not used to report or replace lost or stolen cards. Lost or stolen cards should be reported to Citi Customer Service. Please visit us online to see a full list of support numbers by card program, region and country.

<https://www.citibank.com/tts/about/contact/>

4. Manage Card Program

Create New Account Application

Key Concepts

To initiate and process a card application for a potential Cardholder, you must complete the following steps:

- Assign the card account to a hierarchy in your organization.
- Complete and submit the New Account Application form.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the New Account Application link. <i>The New Account Application: Select Hierarchy screen displays.</i>
2.	From the Select Hierarchy section, select the radio button for the hierarchy that will be assigned. Click the (+) plus sign icon to expand the hierarchy.
3.	Click the Continue button. <i>The Country and Language Screen or Card Application Details screen displays. If the Card Application Details screen displays, continue to Step 7.</i>
4.	From the Select Country drop-down list, select the country.
5.	From the Select Language drop-down list, select the language.
6.	Click the Show Form button. <i>The Card Application Details screen displays.</i>
7.	Complete the application details. Note: An asterisk (*) indicated a required field.
8.	Click the Submit button. Note: The Save as Draft link allows you to save your progress to finish later. <i>A confirmation message displays.</i>
9.	To close the message, click the OK button. <i>The application is sent to Citi for processing.</i>

Run Reports

Key Concepts

Depending on your company's setup, it is possible to run the following reports from the CitiManager Site:

- CitiManager Non-cardholder Self Registration Pending Report
- CitiManager Unregistered Users Report Details
- CitiManager Unregistered Users Report Summary
- CitiManager BOLA Portfolio Report
- CitiManager BOLM Portfolio Report
- CitiManager OLA Aging Report
- CitiManager OLA Approved Card Report
- CitiManager OLM Aging Report

- CitiManager OLM Approved Maintenance Report
- CitiManager Waiting for Signed Copy Report
- User Activity Report

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Reports link. <i>The Search: Reports screen displays.</i>
2.	From the report drop-down list that displays on the right-side of the screen, select the report you wish to run.
3.	From the From Date and To Date fields, select the date range for the report. You can further specify the time of day for the date range selected by typing a timeframe in the From Time and To Time fields. Note: To run a report for a specific hierarchy, click the More Options button and then 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.
4.	Click the Generate button. <i>A message displays indicating the download file may be cached to your computer's hard drive.</i>
5.	Click the OK button. <i>A confirmation message displays at the top of the screen and the browser document options display. The location of the Save or Open options vary based on your browser settings.</i>
6.	Click either the Open or Save option. <i>The selected document opens in Excel or the Save options window opens.</i>

Set Passcode and Pre-fill Application Form Data

Key Concepts

Once the application criteria for your company has been determined and the application has been created, Citi will attach the application to the appropriate card programs and business units within your company in the CitiManager Site.

A Non-cardholder can set a security passcode for online applications initiated by a Cardholder. This passcode is sent to each card applicant by the Non-cardholder. The card applicant will also be sent the inviter's e-mail address, which is required to access the application. The inviter's e-mail address is the e-mail address of the user who sets the passcode.

Non-cardholders can also set pre-filled fields on the application so the data will be consistent for all Cardholders.

Application passcodes can be created with or without an expiration date. If an expiration date is used, a new passcode must be entered once the expiration date has been reached. The same passcode can be reused.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Set Passcode link. <i>The Set Passcode & Prefill - Set/Change Hierarchy screen displays.</i>
2.	From the Select Hierarchy section, select the radio button for the hierarchy where the passcode will be set. Click the (+) plus sign icon to expand the hierarchy. Note: Only hierarchies in your span of control display. It is possible to set different passcodes for each hierarchy level.
3.	Once the hierarchy for the passcode is selected, click the Save button. <i>The Set/Change Workflow screen displays.</i> Note: Your application workflow displays in the Workflow section. The workflow defines who completes, submits and approves/rejects applications before they are sent to Citi for processing.
4.	In the Passcode field, type the desired passcode. Note: There are no character restrictions for this field.
5.	From the Passcode Expiration section, select the radio button for the desired expiration option. If you select the Allow passcode to expire option, click in the date field and select an expiration date from the calendar.
6.	Click the Continue button. <i>The Prefill Data screen displays.</i>
7.	From the Country drop-down list, select the applicable country.
8.	If you want any of the application fields to default so they are consistent for all Cardholders in a hierarchy, type the pre-fill value in the desired field(s). Note: Different defaults can be set for each hierarchy level using a different passcode.
9.	Click the Continue button. <i>The Preview and Confirm screen displays.</i>
10.	Once you are finished previewing, click the Set Passcode button. <i>The Passcode and form data confirmation message displays at the top of the screen.</i>

Transfer Hierarchy (Single and Bulk)

Key Concepts

As a Non-cardholder you can transfer Cardholder accounts (single or in bulk) from one hierarchy to another, provided they are within your span of control. The hierarchy the Cardholder accounts are being transferred from as well as the one they are being transferred to must be within your span of control.

When multiple Cardholder accounts are transferred from a hierarchy with the same billing date, the accounts will be visible to the gaining unit on the next business day.

When multiple Cardholder accounts are transferred from a hierarchy with a different billing date, the accounts will be visible to the gaining unit one day following the close of the losing unit's billing cycle.

For a newly created business unit, Citi must transfer at least one account into the unit before an account can be transferred using this procedure.

You can also transfer a single Cardholder using the steps in the **View/Transfer Cardholder Hierarchy** topic in this User Guide.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Bulk Hierarchy Transfer link.</p> <p><i>The Bulk Hierarchy screen displays.</i></p>
2.	<p>Select the radio button for the receiving hierarchy where the accounts will be transferred.</p>
3.	<p>Click the Transfer Hierarchy button.</p> <p><i>The Hierarchy Transfer – Search screen displays.</i></p>
4.	<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>
5.	<p>From the Card Number column, select the radio button for the card account you wish to transfer and click the Add Account for Transfer link.</p> <p><i>A confirmation message displays at the top of the screen indicating the account has been added to the list of accounts to be transferred.</i></p>
6.	<p>To add additional accounts to be transferred (in bulk), repeat Step 5 for each account to be transferred. When you are finished, continue to Step 7.</p>
7.	<p>When all accounts have been added, click the Continue button.</p> <p><i>The Transfer Hierarchy Recap screen displays.</i></p>
8.	<p>Verify the accounts selected for transfer, and click the Continue button.</p> <p><i>The Transfer Hierarchy Confirm screen displays.</i></p>

Download/Upload Bulk Online Applications (BOLA)

Key Concepts

Bulk Online Applications (BOLA) allows Program Administrators to initiate a large number of Cardholder Applications in bulk using a file upload process. When initiating applications in bulk, cardholders do not need to create their application manually through the CitiManager Site.

When uploading applications using BOLA:

- Only use the BOLA Form Template downloaded from the correct hierarchy in the CitiManager Site. Copy the hierarchy displayed in the downloaded form to all records in the BOLA Form Template. It's best practice to use one form per one hierarchy.
- Required fields may vary depending on your company setup.
- Do not reorder or delete columns because it will cause your entire spreadsheet to fail.
- You can hide columns you do not use or color code (highlight) them to suit your needs to ensure they are completed. You do not have to make the columns visible or remove the highlights for the spreadsheet to process.
- Addresses minimally require Address Line 1, City, State and Zip Code in the United States and Address Line 1 City, Province and Canadian Postal Code for Canadian accounts.
- Country designations in North America are either USA (United States) or CAN (Canada).
- Use a new BOLA Form Template for each bulk upload; do not create a new tab in the same document.
- No more than 2000 records can be added to the Excel spreadsheet.
- BOLA files process between 8:00 A.M. and 6:00 P.M. EST, Monday through Friday. File cut off times still apply because files that begin at the cut off time have to be given time to complete prior to our nightly processing. Processing time for a file is determined by file size and is volume dependent.
- Once you have completed the spreadsheet, it must be uploaded to The CitiManager Site. After it is uploaded, monitor the status and verify if any rows were rejected.

Step-By-Step Instructions

Download the Bulk Online Application Form Template

Note: It is recommended you download the Bulk Online Application Form Template each time to ensure you use the most current version.

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link. <i>The Document Management screen displays.</i>
2.	From the Select Function drop-down list, verify Bulk Online Application is selected. If not, select it from the drop-down list.
3.	From the Select Activity section, select the Download Bulk Online Application Form Template radio button.
4.	Click the Download button. <i>The Download Form Template screen displays.</i>
5.	Click the (+) plus sign icon to expand the hierarchy tree. Select the hierarchy to which you would like the card accounts to be set up and click the Download button. <i>The select format window displays.</i>

Step	Action
6.	Select the Download Excel Template or Download Text Template radio button and click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i>
7.	Click the OK button. <i>A message displays indicating your document downloaded successfully and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i>
8.	From the browser document option window, click the Open button. <i>The BOLA Form Template opens in selected format.</i>
9.	Complete the required fields and save the document to your computer's hard drive. Refer to the Complete the Bulk Online Application Form Template topic for additional information about completing and saving the spreadsheet.

Complete the Bulk Online Application Form Template

Note: You can make formatting changes, such as hiding unneeded columns or highlighting mandatory fields. Do not change the text in the headers or delete or move any columns.

Step	Action
1.	<p>Populate the BOLA Form Template with all the required information.</p> <p>Note: The PA E-mail Address is populated based on the profile of the user who downloaded the form. The Form ID, PA E-mail and the Identifier for Card Unit/Hierarchy are pre-filled and are mandatory for each record in the spreadsheet. Please copy this information down to each record.</p> <p>The required fields for completing bulk online applications include:</p> <ul style="list-style-type: none"> • Legal name (e.g. The name on birth certificate or as subsequently changed by legal acts, such as marriage). The first name and last name are entered in separate fields. Both the First Name and Last Name field are required. • Address Line 1 (or an Army Post Office or Fleet Post Office box number if applicant is in the military). U.S. Only: This cannot be a P.O. Box address if you are requesting the card to be expedited. • City • State • Postal Code • Social Security Number (U.S. Only) Full 9-digit SSN required for Individual Liability Accounts and last 4-digits of SSN required for Centrally/Corporate Billed Accounts • Identification number (Canada Only) such as an Alien Identification Number or Passport Number • Home and business telephone numbers • Other fields may be required for a particular program or company <p>Note: Refer to row two of the form for field formatting requirements or refer to the Appendix for additional information.</p>

Step	Action
2.	When you are finished, save the file as an Excel spreadsheet to your computer's hard drive. From the File menu, select Save As . <i>The Save As window displays.</i>
3.	Navigate to the desired folder location on your computer's hard drive.
4.	In the File name field, type the new name of the spreadsheet. Note: The file can be saved using any standard file naming convention however each file that is uploaded must have a unique file name to avoid uploading the same file multiple times and to assist with troubleshooting. The file must be saved in .xls format, not .xlsx or an error will occur.
5.	Click the Save button. <i>The file is saved to your computer's hard drive and is ready to be uploaded.</i>

Upload the Completed Bulk Online Application Form

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link. <i>The Document Management screen displays.</i>
2.	From the Select Function drop-down list, verify Bulk Online Application is selected. If not, select it from the drop-down list.
3.	From the Select Activity section, select the Upload Bulk Online Application Data File radio button. <i>The Upload Bulk Online Application Data File section displays.</i>
4.	From the Upload Bulk Online Application Data File section, click the Browse button and navigate to the completed Excel file (.xls not .xlsx format) saved locally to your computer's hard drive. Select the file and click the Open button. <i>The file name displays in the field to the left of the Browse button.</i>
5.	Click the Upload button. <i>The CitiManager Site processes the file and confirmation message displays at the top of the screen.</i> Note: Exceptions may occur during processing due to incorrect formatting of fields or omission of mandatory fields. Exceptions that occur during this part of the process will not generate an e-mail and must be reviewed in the Error Description file.
6.	To review the status of the records submitted in the BOLA file, from the Select Activity section, select the Download Bulk Online Application History radio button. <i>The Download Bulk Online Application History section displays the list of files uploaded and their status.</i>

Step	Action
7.	<p>To view a copy of the completed BOLA file that was uploaded</p> <ol style="list-style-type: none"> From the Select Activity section, verify the Download Bulk Online Application History radio button is selected. <i>The Download Bulk Online Application History section displays.</i> From the Uploaded/Arrived File column, click the link for the date you wish to view. <i>The Uploaded File Download window displays.</i> Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i> Click the OK button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i> Click the Open button. <i>A copy of the uploaged BOLA file opens for the selected date.</i>
8.	<p>To open a copy of the Excel file that contains errors:</p> <p>Note: The successful Excel files will process without further action. Only the failed Excel files display. If there is no file listed, then there were no errors associated with that Excel file. However, in cases where the Citimanager Site cannot process the uploaded file (e.g. BOLA uploaded under the BOLM flow or a column was deleted or changed) the entire file will fail and this will be reflected in the Error Description file but an Original Error file will not be generated because that template cannot be used. Any record found in the error file has not been transmitted to Citi for processing.</p> <ol style="list-style-type: none"> From the Select Activity section, verify the Download Bulk Online Application History radio button is selected. <i>The Download Bulk Online Application History section displays.</i> From the Original Error File column, click the file name link for the desired date. <i>The Uploaded File Download window displays.</i> Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i> Click the OK button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i> Click the Open button. <i>A copy of the uploaged BOLA file opens for the selected date.</i>

Step	Action
9.	<p>To view the error log file and details for the file you uploaded:</p> <ol style="list-style-type: none"> 1) From the Error Description File column, click the link name of the file you uploaded. <i>The Log File Download window displays.</i> 2) Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i> 3) Click the OK button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i> 4) Click the Open button. <i>The error log file opens.</i>
10.	<p>To view the status of the BOLA requests that were successfully uploaded:</p> <ol style="list-style-type: none"> a) From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the View Requests link. <i>The Search for Requests screen displays.</i> b) Enter the desired search criteria and click the Search button. <i>The search results display at the bottom of the screen.</i> c) From the Refine By Request Type section, de-select the All checkbox and only select the Bulk online applications checkbox. Click the Search button. <i>The bulk online application requests display.</i> d) To view the request, click the Request ID link. <i>The request selected displays.</i> <p>Note: A unique Request ID will generate for each record that was successfully uploaded.</p> <p>The Request ID is used for reference when contacting Citi for assistance, for example if the Cardholder does not receive their card.</p> <p>For Individual Liability Programs and and for International Payment Cards a request for consent will be sent to the E-mail addresses of each applicant listed on the BOLA form. These applications will remain in Waiting for E-mail consent status until such time as the applicant clicks the I Agree link in the E-mail.</p> <p>In the event that the consent E-mail is lost, deleted or not received, the E-mail may be re-sent by clicking the Resend BOLA E-mail Consent button located on the View Requests search results screen. Once consent is received, the application will be sent for processing. The status will change to Approved in CitiManager and any issues encountered during processing will be communicated back to you via E-mail.</p>

Update PA E-mail Address for Status E-mails

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link. <i>The Document Management screen displays.</i>
2.	From the Select Activity drop-down list, select the Update PA E-mail Address for Status E-mails radio button. <i>The Update PA E-mail Address for Status E-mails section displays.</i>
3.	In the Update PA E-mail Address for Status E-mails text entry field, type the e-mail address for the PA who will receive status e-mails.
4.	Click the Save button. <i>A confirmation message displays at the top of the screen.</i>

Download/Upload Bulk Online Maintenance (BOLM) Requests

Key Concepts

Bulk Online Maintenance (BOLM) allows Program Administrators to initiate a large number of Cardholder Maintenance requests in bulk using a file upload process.

When uploading BOLM requests:

- Only use the BOLM Form Template downloaded from the correct hierarchy in the CitiManager Site. Copy the Form ID displayed in the downloaded form to all records in the BOLM Form Template.
- Required fields may vary depending on your company setup.
- Do not reorder or delete columns because it will cause your entire spreadsheet to fail.
- You can hide columns you do not use or color code (highlight) them to suit your needs to ensure they are completed. You do not have to make the columns visible or remove the highlights for the spreadsheet to process.
- Addresses minimally require Address Line 1, City, State and Zip Code in the United States and Address Line 1 City, Province and Canadian Postal Code for Canadian accounts.
- Country designations in North America are either USA (United States) or CAN (Canada).
- Use a new BOLM Form Template for each bulk upload; do not create a new tab in the same document.
- No more than 2000 records can be added to the Excel spreadsheet.
- BOLM (and BOLA) files process between 8:00 A.M. and 6:00 P.M. EST, Monday through Friday. File cut off times still apply because files that begin at the cut off time have to be given time to complete prior to our nightly processing. Processing time for a file is determined by file size and is volume dependent.
- Once you have completed the spreadsheet, it must be uploaded to the CitiManager Site. After it is uploaded, monitor the status and verify if any rows were rejected.

Step-By-Step Instructions

Download the Bulk Online Maintenance Form Template

Note: It is recommended you download the Bulk Online Maintenance Form Template each time to ensure you use the most current version.

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link. <i>The Document Management screen displays.</i>
2.	From the Select Function drop-down list, select Bulk Online Maintenance .
3.	From the Select Activity section, select the Download Bulk Online Maintenance Form Template radio button.
4.	Click the Download button. <i>The Download Form Template screen displays.</i>
5.	Select the checkbox for the Level 1 Hierarchy where the card account maintenance will be performed and click the Download button. <i>The select format window displays.</i>
6.	Select the Download Excel Template or Download Text Template radio button and click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i>
7.	Click the OK button. <i>A message displays indicating your document downloaded successfully and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i>
8.	From the browser document option window, click the Open button. <i>The BOLM Form Template opens in selected format.</i>
9.	Complete the required fields and save the document to your computer's hard drive. Refer to the Complete the Bulk Online Maintenance Form Template topic for additional information about completing and saving the spreadsheet.

Complete the Bulk Online Maintenance Form Template

Note: You can make formatting changes, such as hiding unneeded columns or highlighting mandatory fields. Do not change the text in the headers or delete or move any columns.

Step	Action
1.	Populate the Bulk Online Maintenance Form Template with all the required information. Note: Refer to row two of the form for field formatting requirements. The Form ID , Account Number and the fields being maintained are required in each row of the spreadsheet. Be careful not to insert any spaces or extra characters into any unused fields as this will cause errors when the files are processed.
2.	When you are finished, save the file as an Excel spreadsheet to your computer's hard drive. From the File menu, select Save As . <i>The Save As window displays.</i>

Step	Action
3.	Navigate to the desired folder location on your computer's hard drive.
4.	<p>In the File name field, type the new name of the spreadsheet.</p> <p>Note: The file can be saved using any standard file naming convention however each file that is uploaded must have a unique file name to avoid uploading the same file multiple times and to assist with troubleshooting.</p> <p>The file must be saved in .xls format, not .xlsx or an error will occur.</p>
5.	<p>Click the Save button.</p> <p>The file is saved to your computer's hard drive and is ready to be uploaded.</p>

Upload the Completed Bulk Online Maintenance Form

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link.</p> <p><i>The Document Management screen displays.</i></p>
2.	From the Select Function drop-down list, select Bulk Online Maintenance .
3.	<p>From the Select Activity section, select the Upload Bulk Online Maintenance Data File radio button.</p> <p><i>The Upload Bulk Online Maintenance Data File section displays.</i></p>
4.	<p>From the Upload Bulk Online Maintenance Data File section, click the Browse button and navigate to the completed Excel file (.xls not .xlsx format) saved locally to your computer's hard drive. Select the file and click the Open button.</p> <p><i>The file name displays in the field to the left of the Browse button.</i></p>
5.	<p>Click the Upload button.</p> <p><i>The CitiManager Site processes the file and confirmation message displays at the top of the screen.</i></p> <p>Note: Exceptions may occur during processing due to incorrect formatting of fields or omission of mandatory fields. Exceptions that occur during this part of the process will not generate an e-mail and must be reviewed in the Error Description file.</p>
6.	<p>To review the status of the records submitted in the BOLM file, from the Select Activity section, select the Download Bulk Online Maintenance History radio button.</p> <p><i>The Download Bulk Online Maintenance History section displays the list of files uploaded and their status.</i></p>

Step	Action
7.	<p>To view a copy of the completed BOLM file that was uploaded</p> <ol style="list-style-type: none"> From the Select Activity section, verify the Download Bulk Online Maintenance History radio button is selected. <i>The Download Bulk Online Maintenance History section displays.</i> From the Uploaded/Arrived File column, click the link for the date you wish to view. <i>The Uploaded File Download window displays.</i> Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i> Click the OK button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i> Click the Open button. <i>A copy of the uploaged BOLM file opens for the selected date.</i>
8.	<p>To open a copy of the Excel file that contains errors:</p> <p>Note: The successful Excel files will process without further action. Only the failed Excel files display. If there is no file listed, then there were no errors associated with that Excel file. However, in cases where the Citimanager Site cannot process the uploaded file (e.g. BOLA uploaded under the BOLM flow or a column was deleted or changed) the entire file will fail and this will be reflected in the Error Description file but an Original Error file will not be generated because that template cannot be used. Any record found in the error file has not been transmitted to Citi for processing.</p> <ol style="list-style-type: none"> From the Select Activity section, verify the Download Bulk Online Maintenance History radio button is selected. <i>The Download Bulk Online Maintenance History section displays.</i> From the Original Error File column, click the file name link for the desired date. <i>The Uploaded File Download window displays.</i> Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i> Click the OK button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i> Click the Open button. <i>A copy of the uploaged BOLM file opens for the selected date.</i>

Step	Action
9.	<p>To view the error log file and details for the file you uploaded:</p> <ol style="list-style-type: none"> From the Error Description File column, click the link name of the file you uploaded. <i>The Log File Download window displays.</i> Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i> Click the OK button. <i>A message displays indicating the file has downloaded successfully and the browser document options display.</i> Click the Open button. <i>The error log file opens.</i>
10.	<p>To view the status of the BOLM requests that were successfully uploaded:</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. <i>The Search for Requests screen displays.</i> Enter the desired search criteria and click the Search button. <i>The search results display at the bottom of the screen.</i> From the Refine By Request Type section, de-select the All checkbox and only select the Bulk online maintenance checkbox. Click the Search button. <i>The bulk online maintenance requests display.</i> To view the request, click the Request ID link. <i>The request selected displays.</i> <p>Note: A unique Request ID will generate for each record that was successfully uploaded.</p> <p>The Request ID is used for reference when contacting Citi for assistance, for example if there is an issue with the maintenance request.</p>

Update PA E-mail Address for Status E-mails

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link.</p> <p><i>The Document Management screen displays.</i></p>
2.	<p>From the Select Activity drop-down list, select the Update PA E-mail Address for Status E-mails radio button.</p> <p><i>The Update PA E-mail Address for Status E-mails section displays.</i></p>
3.	<p>In the Update PA E-mail Address for Status E-mails text entry field, type the e-mail address for the PA who will receive status e-mails.</p>
4.	<p>Click the Save button.</p> <p><i>A confirmation message displays at the top of the screen.</i></p>

Download/Upload the Supervisor List

Key Concepts

You can upload the list of Supervisors who are designated within your company to approve card applications into the CitiManager Site.

The Supervisor List is available only to companies that use the **Card Applicant > Supervisor > Non-cardholder > Citi** online application approval workflow.

The Supervisor List template can be downloaded from the CitiManager Site and a Non-cardholder can update the document with the required Supervisor information. Once the Supervisor list has been completed, the document should be saved to the Non-cardholder's computer and then it can be uploaded to the CitiManager Site.

Once the Supervisor List is successfully uploaded, it is immediately available in the CitiManager Site so Card Applicants can select the approving Supervisor.

When a Supervisor is selected for the first time during the application submission process by an applicant, the Supervisor will receive registration details from Citi. Once the Supervisor registers in the CitiManager Site and creates a log in, they will be able to access application requests submitted for Supervisor approval in the CitiManager Site.

Step-by-Step Instructions

Download the Supervisor List Template

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link. <i>The Upload Bulk Online Application File screen displays.</i>
2.	From the Select Function drop-down list, select Supervisor List . <i>The Download Supervisor List screen displays.</i>
3.	From the Select Activity section, select the Download file radio button.
4.	Click the Download button. <i>A message displays indicating the file may be saved to your computer's hard drive.</i>
5.	Click the OK button. <i>A message displays at the top of the screen indicating your document is ready for download and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i>
6.	From the browser document option window, click the Open button. <i>The Supervisor List opens in Excel format.</i>
7.	Update the required fields on the Supervisor List template and save the document to your computer.

Upload the Supervisor List Template

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Document Management link. <i>The Upload Bulk Online Application File screen displays.</i>
2.	From the Select Function drop-down list, select Supervisor List . <i>The Download Supervisor List screen displays.</i>
3.	From the Select Activity section, select the Upload File radio button. <i>The Upload Supervisor List screen displays.</i>
4.	From the Upload File section, click the Browse button and navigate to and select the updated Supervisor list template you saved to your computer and then click the Open button. <i>The file name displays in the field to the left of the Browse button.</i>
5.	Click the Upload button. <i>The file upload confirmation message displays.</i> Note: The uploaded file now becomes the new Supervisor List for your company. The CitiManager Site will retain the most recent Supervisor List uploaded to the system.

View Your Hierarchy and Download the Hierarchy From Report

Key Concepts

You can view hierarchies in your span of control. The following default hierarchy entitlement(s) information displays:

- **Company Name:** Name of the company to which you belong
- **Unit Name:** Name of the hierarchy to which you belong in the company
- **Unit Number:** Number/node of the hierarchy to which you belong in the company
- **Full Hierarchy:** Complete hierarchy to which you are associated

You can also download the Hierarchy Form Report which displays hierarchy, form and workflow information.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the View Hierarchy link. <i>The View Hierarchy screen displays.</i>
2.	To expand the hierarchies, click the (+) plus sign icon to expand the hierarchy.

Step	Action
3.	<p>To download the Hierarchy Form Report:</p> <ul style="list-style-type: none"> a) Click the Hierarchy Form Report button. <i>The download window opens.</i> b) Click the Download button. <i>A message displays indicating the report may be cached to your computer's hard drive.</i> c) Click the OK button. <i>The browser options window displays.</i> d) Either open or save the report.

View TBR (Total Business Report) Hierarchies In Your Span of Control

Key Concepts

You can view TBR (Total Business Report) hierarchies within your span of control based on your entitlements.

The following default hierarchy entitlement(s) information displays:

- **Company Name:** Name of the company to which you belong
- **Unit Name:** Name of the hierarchy to which you belong in the company
- **Unit Number:** Number/node of the hierarchy to which you belong in the company
- **Full Hierarchy:** Complete hierarchy to which you are associated.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the View TBR Hierarchy link.</p> <p><i>The View TBR Hierarchy screen displays the Company Name, Unit Name, Unit Number and Full Hierarchy.</i></p>

Set Alerts for a Specific Hierarchy

Key Concepts

You can set alerts that will be available to Cardholders in a specific hierarchy within your span of control. This does not select which alerts Cardholders will receive, but it does change which alert options are available to Cardholders. If a hierarchy level is selected and it has lower-level hierarchies attached to it, then all hierarchies that fall under the higher level hierarchy will also have those alerts available.

Setting alerts is entitlement driven, so you may not have access to this functionality if the entitlement has not been granted to you or turned on for your company.

There are two types of alerts you can set as defaults:

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

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Set Alerts link.</p> <p><i>The Select Hierarchy screen displays.</i></p>
2.	<p>To select the hierarchy where the alerts will be set, click the (+) plus sign icon to expand the hierarchy.</p>
3.	<p>Select the radio button for the desired hierarchy and click the Continue button.</p> <p><i>The Set Alerts screen displays.</i></p>
4.	<p>To subscribe to alerts, select the E-mail and/or SMS Text checkbox(es) for each of the alerts you wish to make available to users in this hierarchy.</p> <p>To unsubscribe to alerts, de-select the E-mail Alerts and/or SMS (Mobile Alerts) checkbox(s) for the alerts you do not wish to have available for users in this hierarchy.</p> <p>Note: For more information about each alert, position your mouse over the information icon next to the alert name.</p> <p>Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the Available Credit Remaining % alert, you must select the desired Available Credit Remaining %. When the selected percent of remaining credit level is met, you will receive an alert.</p>
5.	<p>When you are finished, click the Continue button.</p> <p><i>The Preview and Confirm screen displays.</i></p>
6.	<p>Review the alerts selected and if confirmed, click the Save button.</p> <p><i>A confirmation message displays at the top of the screen.</i></p>

5. Resources

View and Post Messages

Key Concepts

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

Additionally, it is possible to post a new message to a specific hierarchy within your span of control. Once the message is submitted, it will be sent to the Citi Helpdesk for approval.

Step-by-Step Instructions

View Messages

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Messages link. <i>The Messages screen displays.</i>
2.	To view additional information about a message, from the Subject column, click the desired message link. <i>The Messages screen displays and any messages display in the Message Board section.</i>
3.	To return to the list of messages, click the Back button.

Post a New Message

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and then click the Messages link. <i>The Messages screen displays.</i>
2.	To post a new message, click the Post New Message link. <i>The Post Message screen displays.</i>
3.	Click the Select Hierarchy link. <i>The Select Hierarchy screen displays.</i>
4.	Click the (+) plus sign icon to expand the hierarchy tree. Select the checkboxes for the hierarchies to which you want to post the message. When you are finished, click the Select button.
5.	From the Display From and Display Till fields, select the timeframe you wish the message to be posted.
6.	From the Subject field, type the subject of the post.
7.	In the Message text field, type the message.
8.	Click the Post button. <i>The message is sent to Citi for approval.</i>

Upload and Download Documents Using Library

Key Concepts

The Library allows Non-cardholders to securely share files with Citi.

Folder categories may include:

- Document Sharing
- File Delivery
- Program Reports
- Reference Material
- System Logs

The categories available are based on client requirements so all categories may not be visible to you.

You can download files from all folders categories. You can only upload files if this feature has been activated for your company and you have been granted the entitlement to upload files.

You can only upload documents to folders in the **Document Sharing** category.

Step-by-Step Instructions

Download a Document from the Library

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Library link. <i>The Library – Search for Folders screen displays..</i>
2.	You can choose to view folders with or without documents by selecting the desired option from the drop-down list that displays in the upper-right corner.
3.	You can perform a search to sort what displays by choosing a folder category and arrival date or typing a folder title. When you are finished, click the Search button. <i>The document titles that meet the search criteria entered display.</i>
4.	To download a document, click the Download icon that displays on the right-side of the row for the document you want to download. <i>The Document to be downloaded message displays.</i> Note: The download format defaults to a zip format. To download unzipped documents de-select the zip checkbox.
5.	Click the Download button. <i>A confirmation message displays indicating the document may be cached to your computer's hard drive.</i>
6.	Click the OK button. <i>The browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i>
7.	Click either the Save or Open button. <i>The selected document/zip file opens or the Save options window opens.</i>

Upload a Document to Library

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Library link. <i>The Library – Search for Folders screen displays.</i>
2.	To upload a document, click the Upload icon that displays on the right-side of the row for the folder where you want the document to reside. Note: You can only upload files to the Document Sharing category if it has been activated for your company and you have been granted permission to upload files.
3.	To upload a file, click the (+) plus sign icon displayed under the Upload header next to the folder title where you want your file loaded. <i>The File upload window displays.</i>
4.	To select a file to be uploaded, click the Browse button. <i>The Choose file window displays.</i> Note: Search your personal drives to find the file to be uploaded.
5.	Navigate to and select the file you wish to download from your personal drives.
6.	To upload the file, click the Upload button. <i>The file is uploaded to the selected folder.</i>

Download the Export Log

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Library link. <i>The Library – Search for Folders screen displays.</i>
2.	Click the Export List button that displays at the bottom of the screen. <i>The Export List zip option window option displays.</i>
3.	Choose whether you would like to download the file in zipped format or not and click the Download button. <i>A message displays indicating the file may be saved to your computer.</i>
4.	Click the OK button. <i>The browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i>
5.	Click Open button. <i>The selected document opens as a text file. If you chose to download the file in zipped format, a message displays confirming you want to open the zipped file.</i>

Search for Non-cardholders

Key Concepts

You can search for Non-cardholders and view the following information:

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Search link. <i>The Search for Users screen displays.</i>
2.	To perform a basic search, use the First Name , Last Name or Username fields and click the Search button. Note: To search by Role and Hierarchy Name , click the More Options link. <i>The search results display based on the search criteria entered.</i>

View Frequently Asked Questions

Key Concepts

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the FAQs link. <i>The View FAQ screen displays.</i>
2.	Click the NA CitiManager FAQ link or another available document. <i>A message displays indicating the downloaded file may be cached to your computer's hard drive.</i>
3.	Click the OK button. <i>The browser document option window displays. The location of the Save or Open options vary based on your browser settings.</i>
4.	Click either the Save or Open option. <i>The selected document opens in Portable Document Format (PDF) or the Save options window opens.</i>

Access Links & Help

Key Concepts

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Links & Help link. <i>The Links/Help screen displays.</i>
2.	Click the link for the resource you wish to access. <i>A message displays indicating you will be opening an external link.</i>

Step	Action
3.	<p>Click the OK button.</p> <p><i>Depending on the type of resource selected, either the website will open or a message displays indicating the selected document will be cached to your computer's hard drive.</i></p> <p>Note: When you click on a link for an external site, a new browser opens and you will be directed to the selected site. You will still be logged into the CitiManager Site.</p>
4.	<p>If a document was selected, click the OK button to close the message.</p> <p><i>The browser document options display. The location of the Save or Open options vary based on your browser settings.</i></p>
5.	<p>Click either the Open or Save option.</p> <p><i>The selected document opens in Portable Document Format (PDF) or the Save options window opens.</i></p>

6. Web Tools

Access Web Tools (Transaction Management, Reporting, Expense Management)

Key Concepts

The following tools may be accessed based on your entitlements and your company setup:

- Use **CitiManager – Transaction Management** to define and manage General Ledger codes and allocate/reallocate transactions.
- Use **CitiManager – Reporting** to run reports using templates or to create custom reports.
- Use **CitiManager – Expense Management** for transaction management, allocations, reconciliation, as well as program oversight.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Web Tools icon and click the link for the tool you wish to open. <i>A window opens displaying the roles/programs in which you have entitlements.</i>
2.	If necessary, click the desired hierarchy sub-link. <i>The selected tool launches in a new window.</i>

Access the Learning Center

Key Concepts

The Learning Center is Citi's learning management system that can be accessed from the CitiManager Site.

The Learning Center provides on-demand, self-paced training so you can register for webinars, instructor-led training (ILT), complete computer-based training (CBT) courses and access reference documents 24/7. There are also complete end-to-end user guides and quick-start guides available.

Step-by-Step Instructions

To Assign Access to CitiDirect Card Management System:

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Web Tools icon and click the Learning Center link. <i>The Learning Center screen displays in a new window.</i>
2.	To access available resources: In the Search field, type the desired search criteria, for example, CitiManager User Guide , and click the search arrow, OR Click the desired Catalog link.

Step	Action
3.	<p>To register for and launch a course or open a user guide:</p> <ul style="list-style-type: none">a) Select the resource from the search results and click the Register button.b) From the Registration Process screen, verify the activity checkboxes are selected and click the Submit button.c) Once you have registered for a course or curriculum, click the Start button from the Activities Details screen or To Do list. <i>A reference document will launch automatically. If you are opening a computer-based training module, the Learning Activities Details window opens.</i>d) To start a computer-based training module, click the Next button. <i>The CBT launches in a new window.</i>

7. Alerts

Set Your Personal Alert Subscriptions

Key Concepts

As a Non-cardholder, you can set your personal alerts so notifications are automatically sent to you when certain selected activity occurs to Cardholder accounts in your hierarchy. For example, you will be notified when a transaction is declined.

For certain alerts, you can register to receive alerts from specific hierarchy levels.

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

- Time zone
- Time of day
- Days of week

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Alerts icon and then the Alert Subscriptions link. <i>The Alerts Subscription screen displays.</i>
2.	To enter/edit the e-mail address(es) where you want alerts sent, click the Contact Preferences – Edit link and complete the following steps when the E-mail Address Preferences window opens: <ol style="list-style-type: none"> a) Type and confirm up to five e-mail addresses. b) Click the Save button.
3.	To subscribe to alerts, select the checkbox(es) for each of the alerts you wish to receive. To unsubscribe alerts, de-select checkbox(es) for the alerts you no longer wish to receive. Note: For more information about each alert, click the information icon next to the alert name. Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the Available Credit Remaining % alert, you must select the desired Available Credit Remaining % . When the selected percent of remaining credit level is met, you will receive an alert. For alerts that allow you to select the hierarchy level, click the Select Hierarchy link. Click the (+) plus sign icon to expand the hierarchy tree. Select the checkboxes for the hierarchies from which you want to receive alerts. When you are finished, click the Select button.
4.	Click the Save button. <i>The alerts settings are saved and a confirmation message displays at the top of the screen.</i>

View Alert Audit Log

Key Concepts

Use the Alert Audit Log to view changes that have been made to alerts. You can view the following:

- The date and time of the change
- Who made the change
- Category of alert such as account, maintenance, spending or payment
- The previous status and the current status

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Alerts icon and then click the Audit Log link. <i>The Audit Log screen displays a log of alerts that have been changed.</i>

View On-Demand Mobile Alert Commands

Key Concepts

Once your Cardholders have set up their mobile number in the CitiManager Site, they are able to request account information from Citi on-demand.

To receive on-demand alerts from their registered mobile device, they will text the desired command (e.g., HIST) to GOCITI (462484). A list of available commands are available from the CitiManager Site.

For some on-demand mobile alerts the Cardholder is required to enter the last four digits of their account number after the command. For example, to receive account balance information, they would text BAL1234 to GOCITI (462484) where 1234 represents the last four digits of their account number.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Alerts icon and click the On-Demand Mobile Alerts link. <i>The On-Demand Mobile Alerts screen displays the commands and a description for each.</i>

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