CitiManager® Quick Start Guide Cardholders
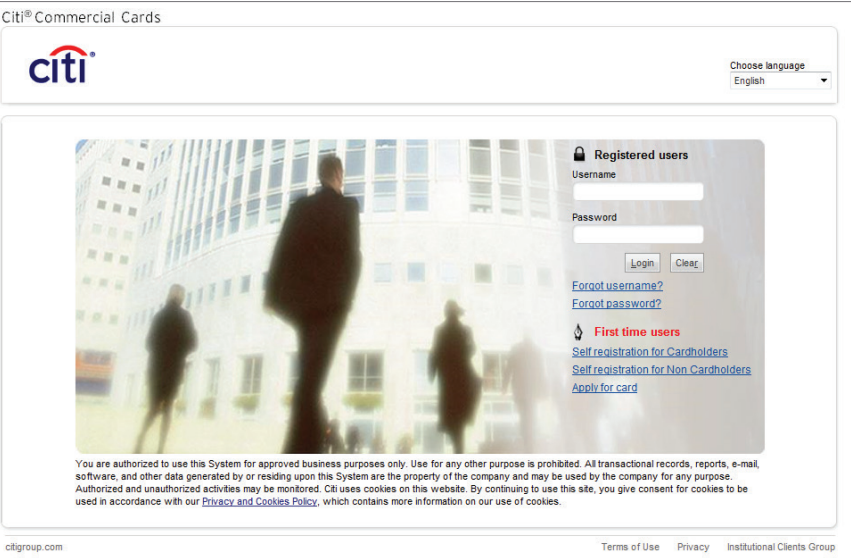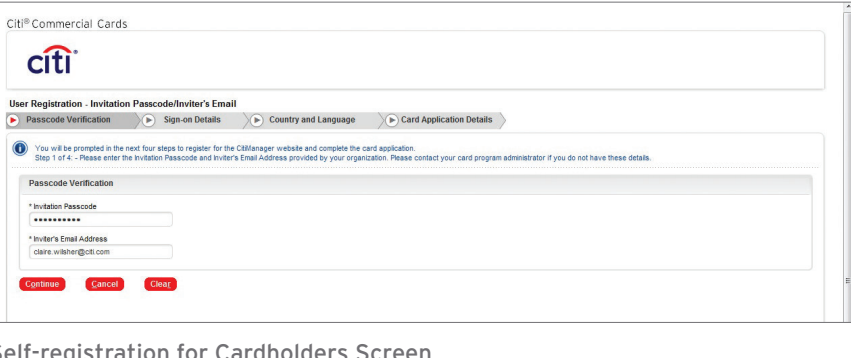
July 2015

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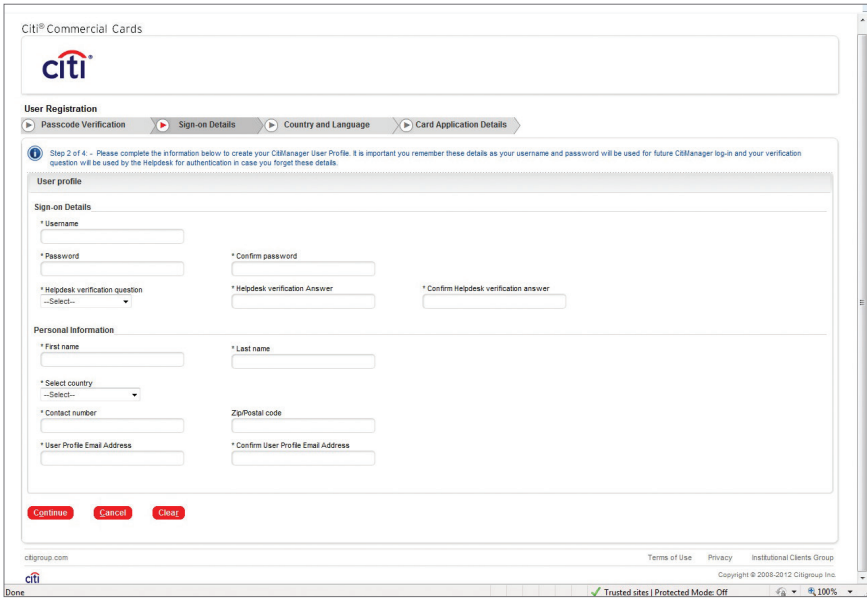# Apply for a Card Using an Invitation Passcode

Key Concepts

Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required. Both are obtained from your Program Administrator. You will receive a confirmation message after completing your application, when the necessary approvals have been received, either from a Supervisor and/or Program Administrator. You can view the status of your application in the CitiManager Site by using the username and passcode created using the steps described below.
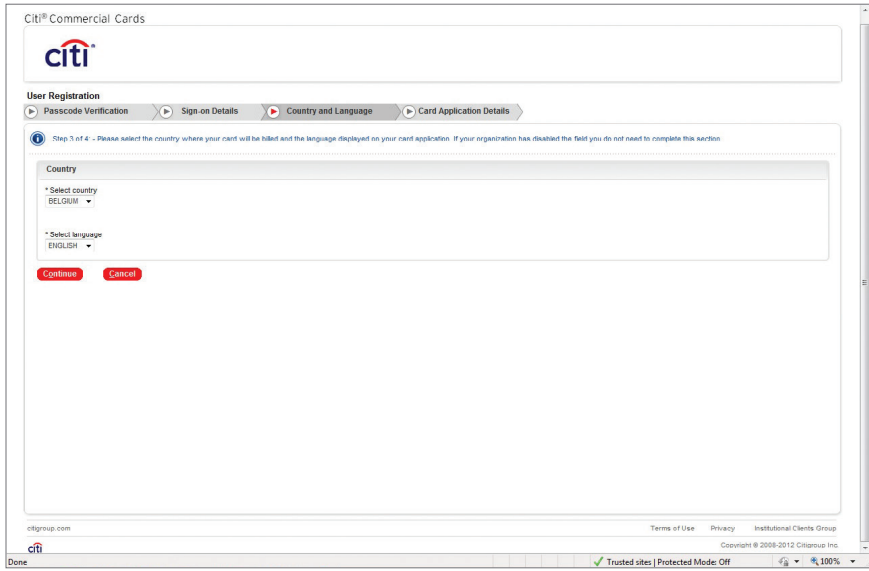
Once your card application is approved, the account will be linked to your CitiManager Site username and password that was created during the application process. This will allow you to perform functions in the CitiManager Site such as view and print statements.
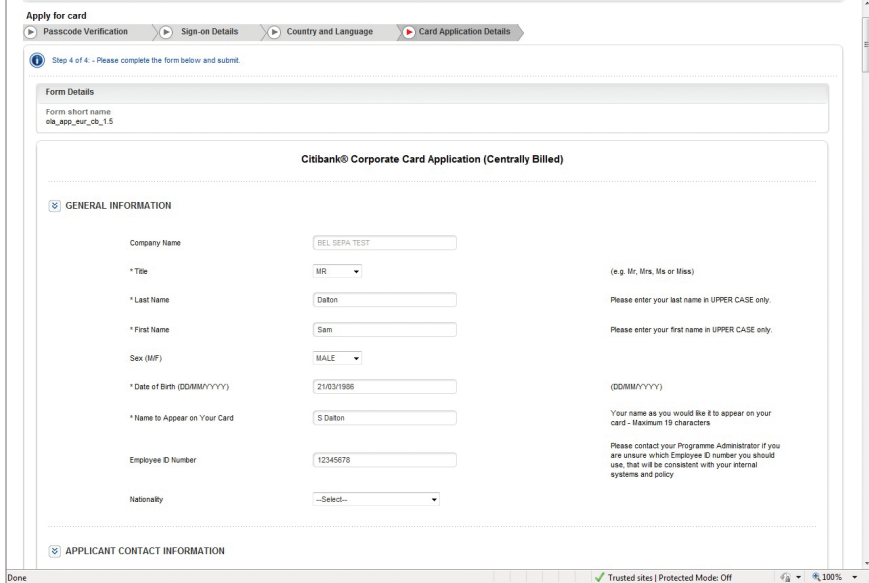
Step-by-Step Instructions

Screen	Step/Action
CitiManager Site Login Screen	1. Navigate to **citimanager.com/login**. 2. From the **CitiManager Site Login** screen, click on the **Apply for Card** link. *The User Registration screen displays.* 3. Click the **Invitation Pass code** radio button. Click the **Continue** button. *The Passcode Verification screen displays.*
Self-registration for Cardholders Screen	4. In the **Invitation Passcode** field, type the Invitation Passcode that was sent to you by your Program Administrator. 5. In the **Inviter's e-mail address passcode** field, type the inviter's e-mail address that was sent to you by your Program Administrator. 6. Click the **Continue** button. *The User Registration screen displays.*

Screen	Step/Action
Citi® Commercial Cards **User Registration** Passcode Verification	Sign-on Details	Country and Language	Card Application Details Step 2 of 4: – Please complete the information below to create your CitiManager User Profile. It is important you remember these details as your username and password will be used for future CitiManager log-in and your verification question will be used by the Helpdesk for authentication in case you forget these details. **User profile** **Sign-on Details** * Username * Password * Confirm password * Helpdesk verification question * Helpdesk verification Answer * Confirm Helpdesk verification answer --Select-- **Personal Information** * First name * Last name * Select country --Select-- * Contact number Zip/Postal code * User Profile Email Address * Confirm User Profile Email Address Continue Cancel Clear citigroup.com Terms of Use Privacy Institutional Clients Group Copyright © 2008-2012 Citigroup Inc. Done Trusted sites | Protected Mode: Off 100% **Self-registration for Cardholders Screen – Registration Details**	7. In the **Username** field, type a username. **Note:** A username is not case sensitive and must meet the following requirements: • Must be more than six characters • May contain letters, numbers and special characters • Cannot contain spaces(s) • Must not contain only numbers 8. In the **Password** field, type a password that meets the password requirements. **Note:** Passwords are case sensitive and must meet the following requirements: • Should have six to nine characters • At least one letter is required • Must contain at least one number • Cannot be the same as your last six password(s) 9. In the **Confirm password** field, retype the password. 10. From the **Helpdesk verification question** drop-down list, select the verification question. 11. In the **Helpdesk verification answer** field, type the answer to the verification question you selected. 12. In the **Personal Information** section, complete the required fields. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field. The required fields are First name, Last name, country, Contact number, User Profile e-mail Address, and Confirm User Profile e-mail Address. 13. Click the **Continue** button. *A pop-up message displays stating, "Your user ID has been created successfully. Please proceed further to apply for a card."* **Note:** The CitiManager Site will send an e-mail confirming the registration and username created. 14. Click the **OK** button. *The Country screen displays.*

Screen	Step/Action
Self-registration for Cardholders Screen – Card Details	15. Select the country of the currency where the card will be billed from the drop-down list and then select your language preference. **Note:** Only the countries selected by your company will display in the drop-down list. 16. Click the **Continue** button. *The card application form displays.*
Card Application Screen	17. Complete the required fields on the application. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field. If you are unable to complete the required fields, you can also save the application as draft and return to it later. 18. Click the **Submit** button. *An application submission confirmation message displays.* 19. Click the **OK** button. *The CitiManager Site Login screen displays.* **Note:** The approving Supervisor or Program Administrator will receive an e-mail advising them that your application is awaiting their approval.

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Log In/Out of the CitiManager Site

Key Concepts

A username and password are required to access the CitiManager Site which you would have set up at the time of your Application request.

When you are finished using the CitiManager Site, always use the **Logout** button. Do not close the application by using the browser **Close (X)** button.

Step-by-Step Instructions

Screen	Step/Action
Citi® Commercial Cards Choose language: English **Registered users** Username: training Password: ••••••• Login Clear Forgot username? Forgot password? **First time users** Self registration for Cardholders Self registration for Non Cardholders Apply for card You are authorized to use this System for approved business purposes only. Use for any other purpose is prohibited. All transactional records, reports, e-mail, software, and other data generated by or residing upon this System are the property of the company and may be used by the company for any purpose. Authorized and unauthorized activities may be monitored. Citi uses cookies on this website. By continuing to use this site, you give consent for cookies to be used in accordance with our Privacy and Cookies Policy, which contains more information on our use of cookies. citigroup.com Terms of Use Privacy Institutional Clients Group **CitiManager Site Login Screen**	1. Navigate to **citimanager.com/login**. 2. From the **CitiManager Site Login** screen, type your **Username** and **Password** in the required fields. 3. Click the **Login** button. *The Challenge Question screen displays.*
Answer the challenge question to continue. What is your favorite food or drink? ••••••• Continue Cancel **Challenge Question Screen**	4. In the challenge question field, type the answer to the challenge question. 5. Click the **Continue** button. *The CitiManager Site Home screen displays. You have successfully logged into the CitiManager Site.*
Welcome! 02/03/2015 For assistance please contact Citi Customer Services ▶ Logout CITI GTD US - US Home My Card Account Statement Payment My Profile Resources Web Tools **Logout**	6. To log out of the CitiManager Site, click **Logout** at the top right of any screen. *The CitiManager Site Login screen displays.*
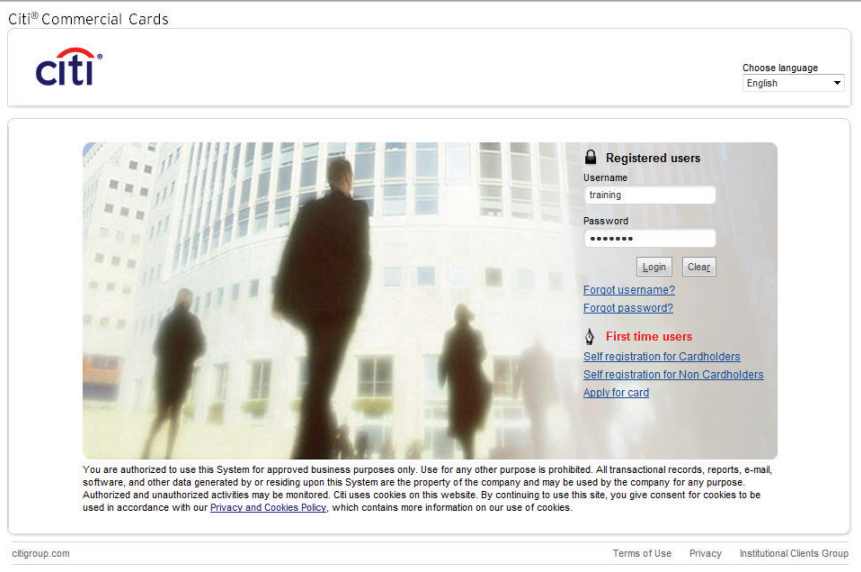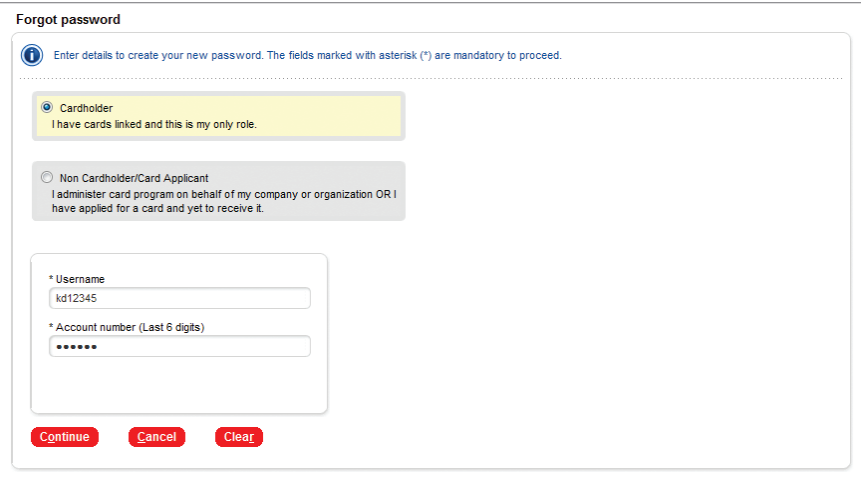
Reset Forgotten Password
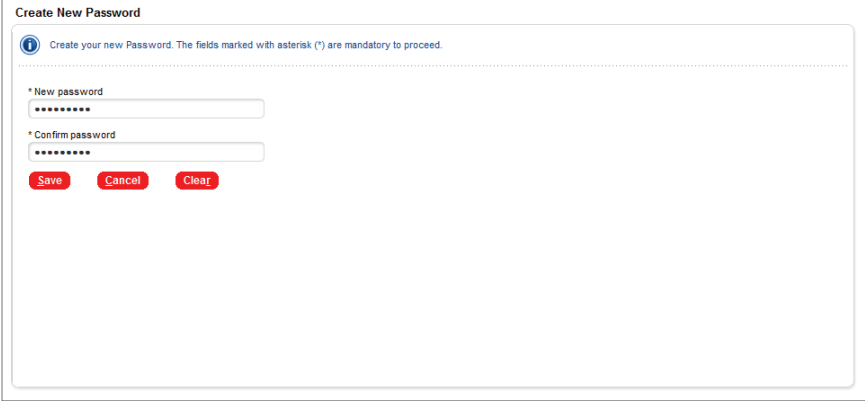
Key Concepts

If you forget your password, it is necessary to reset your password in order to log in to the CitiManager Site. To reset your password, the following information is required:

- A valid username
- The last six digits of the Card number

Step-by-Step Instructions

Screen	Step/Action
CitiManager Site Login Screen	1. Navigate to **citimanager.com/login**. 2. From the **CitiManager Site Login** screen, click the **Forgot password?** link. *The Forgot password screen displays.*
Forgot Password Screen	3. Select the **Cardholder** radio button. 4. In the **Username** field, type your username. 5. In the **Account number (Last 6 digits)** field, type the last six digits of your account number. 6. Click the **Continue** button. *The Challenge Question screen displays.*

Screen	Step/Action
Answer the challenge question to continue. What is your favorite food or drink? •••••••• Continue Cancel **Challenge Question Screen**	7. In the challenge question field, type the answer to the challenge question and click the **Continue** button. **Note:** You have three attempts to answer the challenge question correctly. *The Create New Password screen displays.*
Create New Password Create your new Password. The fields marked with asterisk (*) are mandatory to proceed. * New password •••••••• * Confirm password •••••••• Save Cancel Clear **Create New Password Screen**	8. Enter and confirm your **New password.** **Note:** Passwords are case-sensitive and must have six to nine characters. At least one letter is required, it must contain at least one number and cannot be the same as your last six passwords. 9. Click the **Save** button. Your new password is saved and the CitiManager Home screen displays.
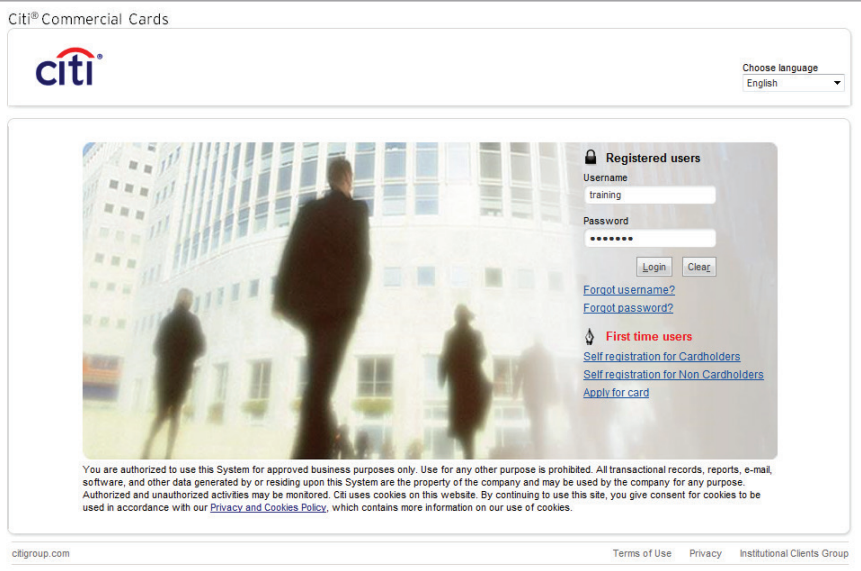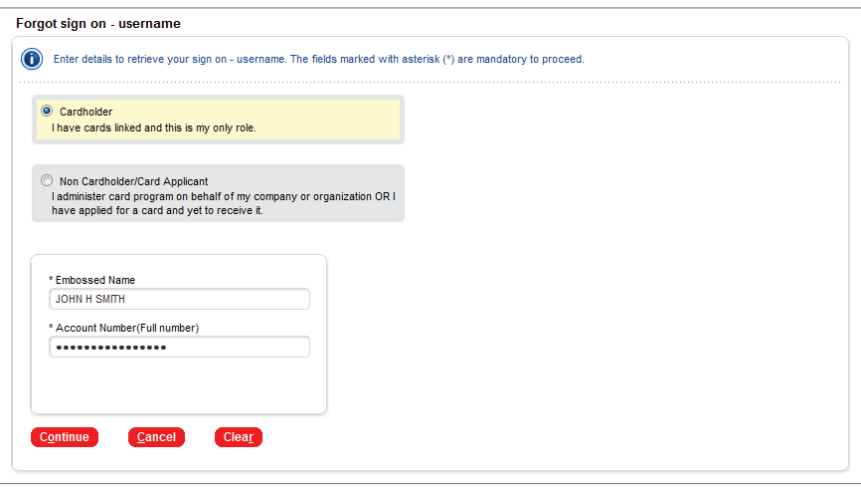
Retrieve Forgotten Username

Key Concepts

If you have forgotten your username, you will need to retrieve it in order to log into the CitiManager Site. Your username will be sent to the e-mail address on file. To retrieve your username, the following information is required:

- Account name as it appears on your card
- Account number (Full number)

Step-by-Step Instructions

Screen	Step/Action
CitiManager Site Login Screen	1. Navigate to **citimanager.com/login**. 2. From the **CitiManager Site Login** screen, click the **Forgot username?** link. *The Forgot sign on – username screen displays.*
Forgot Sign On – Username Screen	3. Select the **Cardholder** radio button. 4. In the **Embossed Name** field, type your name as it appears on your card. 5. In the **Account number (Full number)** field, type your full account number. 6. Click the **Continue** button. *The Challenge Question screen displays.*

Screen	Step/Action
Answer the challenge question to continue. What is your favorite food or drink? •••••• Continue Cancel **Challenge Question Screen**	7. In the challenge question field, type the answer to the challenge question and click the **Continue** button. **Note:** You have three attempts to answer the challenge question correctly. *The system sends an e-mail with the correct username to the e-mail address on file.*

View Statements
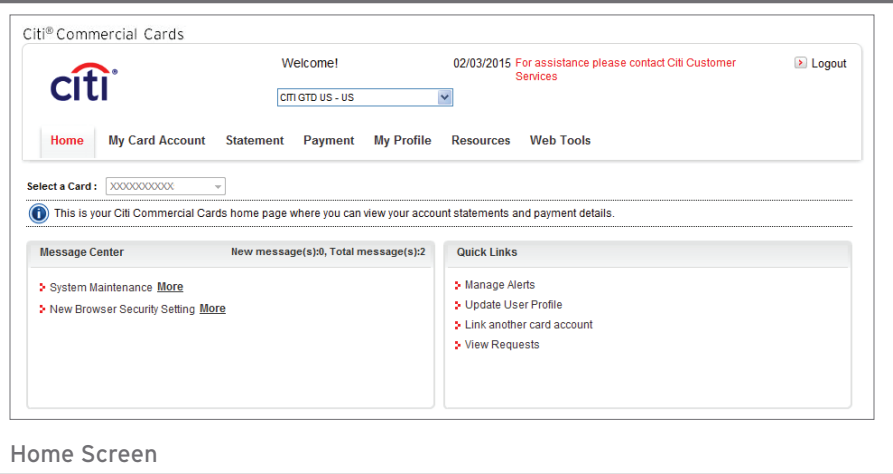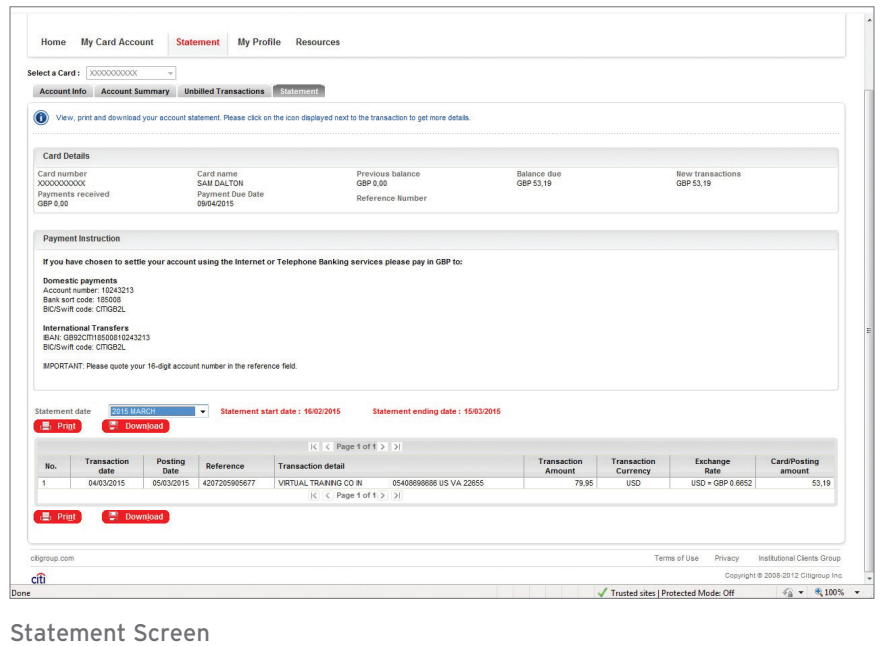
Key Concepts

Your statement displays the following information:

• Card details
• Account balances
• Transaction details

The most recent statement displays but it is possible to view statements from the previous 36 months.

Step-by-Step Instructions

Screen	Step/Action
Home Screen	1. From the **CitiManager Site Home** screen, click the **Statement** tab. *The Statement screen displays the most recent statement.*
Statement Screen	2. To view a previous statement, from the **Statement date** drop-down list, select the desired statement. *The statement for the selected date displays.*

Print Statements

Key Concepts

From the Statement screen, it is possible to print a copy of your statement. The statement is printed as an Adobe PDF (Portable Document Format) document.

Step-by-Step Instructions

Screen	Step/Action
 Home Screen	1. From the **CitiManager Site Home** screen, click the **Statement** tab. *The Statement screen displays the most recent statement.*
 Statement Screen	2. Use the current statement or select a previous statement from the **Statement date** drop-down list, then click the **Print** button. *A print confirmation message displays.*

Screen	Step/Action
Please note by clicking OK the print view will be displayed in a PDF format. Do you wish to continue? **OK** **Cancel** » Download latest version of Acrobat reader **Print Confirmation Message**	3. Click the **OK** button. *A File Download message displays.*
File Download ⊠ Do you want to open or save this file? Name: ...EfoEKIN9g7c2fYC9w14ayLIOmAIHIgO8h1U=.pdf Type: PDFPlus Document From: home.cards.citidirect.com Open Save Cancel While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk? **File Download Message**	4. To open the printable statement, click the **Open** button. *The printable document displays in PDF format.* **Note:** Depending on your PC settings, you may need to allow pop-ups for the statement to display.
Page 1 of 1 **STATEMENT OF ACCOUNT** STATEMENT DATE: 15/03/2015 STATEMENT PERIOD: 16/02/2015 - 15/03/2015 ACCOUNT NUMBER: XXXX-XXXX-XX34-I Citibank® Commercial Cards MR SAM DALTON **ACCOUNT STATUS** Please pay the full statement balance by the payment due date. If your payment is being processed using a Direct Debit, please be advised that the full statement balance (minus any credits received) will be deducted from your account in order that Citibank receives payment by the payment due date. Thank you. CITIBANK® COMMERCIAL CARD ACCOUNT STATEMENT SUMMARY (GBP) Credit Limit 6.000,00 / Available Credit 5.947,00 / Cash Limit 0,00 / Payment Due Date 09/04/2015 Previous Balance 0,00 – Payments Received 0,00 + New Transactions 53,19 = Balance Due 53,19 **MESSAGE** Register now to view your statements online at https://home.cards.citidirect.com/CommercialCard/Cards.html TRANSACTION DETAILS (GBP) Transaction Date / Reference / Transaction Detail / Transaction Amount / Billing Amount (GBP) **Statement – PDF**	5. From the PDF window, click the **Print** button. *The Print window displays.* 6. Select your printer and set any printer preferences. 7. When you are finished, click the **OK** button. *The statement is printed on the designated printer.*
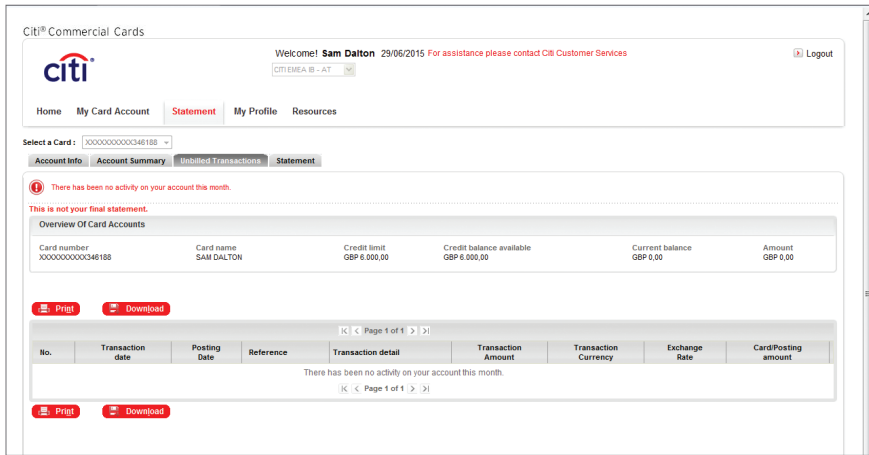
View Unbilled Transactions

Key Concepts

The CitiManager Site allows you to view transactions as they post. Unbilled transactions are all transactions that have posted to your account since your last statement. You can view unbilled transactions before your next billing statement is generated. The unbilled transactions displayed will appear on your next statement and are not part of your current statement.

Step-by-Step Instructions

Screen	Step/Action
Home Screen	1. From the **CitiManager Site Home** screen, click the **Statement** tab. *The Statement screen displays the most recent statement.*

Screen	Step/Action
Unbilled Transactions Screen	2. Click the **Unbilled Transactions** sub-tab. *The Unbilled Transactions screen displays.*

Set Alerts
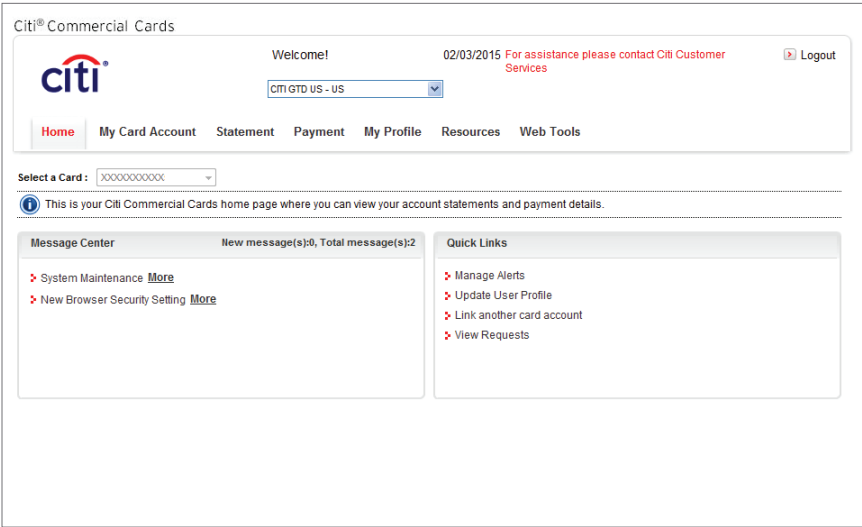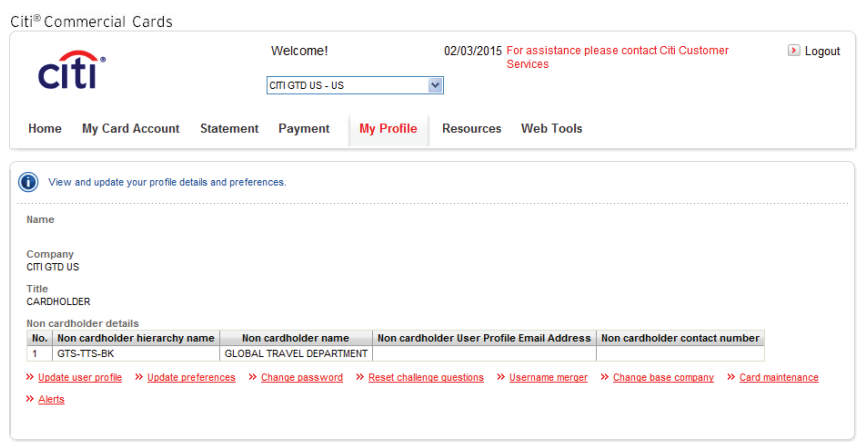
Key Concepts

As a cardholder, you can set alerts so notifications are automatically sent via e-mail or to your mobile device when certain selected activity occurs on your account. For example, you will be notified when your statement is available or when you are within a certain percentage of your credit limit.

You can receive these alerts either by e-mail or a text message to your mobile device.

It is also possible to pick certain days and times to receive the mobile alerts.

Step-by-Step Instructions

Screen	Step/Action
Home Screen	1. From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.*
My Profile Screen	2. Click the **Alerts** link. *The Set Alerts screen displays.*

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Screen	Step/Action
Alert Subscription Screen	3. Select the desired e-mail and/or mobile alerts. **Note:** Some alerts may be greyed out and unavailable. Available alerts are set by your Program Administrator. 4. If selecting any mobile alerts, type your specific **Country Code** and **Mobile number** (no spaces). 5. For e-mail alerts, click the **Manage e-mail Address** link. *The User Profile e-mail Address screen displays.* 6. Enter and confirm up to five e-mail addresses, then click the **Save** button. *The Set Alerts screen re-displays.* 7. If you wish to receive your mobile alerts on specific days/times, expand the **Mobile Alerts Time Preferences** section. 8. Select your **Time zone**, a **From time** and **To time**, along with specific **Day(s)** you would like to receive your mobile alerts. 9. Confirm the **Terms & Conditions** by clicking the check-box, then click the **Save** button. *A confirmation message displays at the top of the screen.*