Citi NA (Open Account) Workspace Vendor Access
Directions for Completion of the Workspace Vendor Access Form

Please read all instructions to complete this form

Considerations

- Form must be electronically filled in its entirety.
- Use one Workspace Vendor access form per vendor (company).
- Please date and sign the form prior to submission. You may want to keep an electronic copy for your records.
- Once the form is submitted to Citi you will be notified via e-mail of the processing results.

Fields

1. Enter information under the section reserved for vendors on the form.
2. Folder Request:
   a. Vendor Company Name: use the company name (vendor name) used to invoice the buyer. A difference in the company/vendor name will result in set-up delays.
   b. Current Purchase Order #: Insert the latest P.O. number for the client mentioned under “Workspace Name” field. The P.O. must have been submitted to Citi previously.
3. User Information:
   a. Action:
      i. Create user: this option is used for setting up first time users into the platform.
      ii. Modify user: use this option to change user basic settings (contact information except e-mail address – as the this will be used to set your user ID)
      iii. Delete user: this option will eliminate user access to the assigned workspace.
   b. Enter user information as outlined on the form.
4. Enter Vendor Name and date.
5. Once you have filled in the appropriate fields, click the Print button on the top of the form and complete with signature.

Submit the completed and signed form to both: Linda.Tie@citi.com and Adrian.P.Banks@citi.com.