

# CitiDirect<sup>®</sup> Digital Onboarding Login Set Up

## Multi-factor Authentication Guide



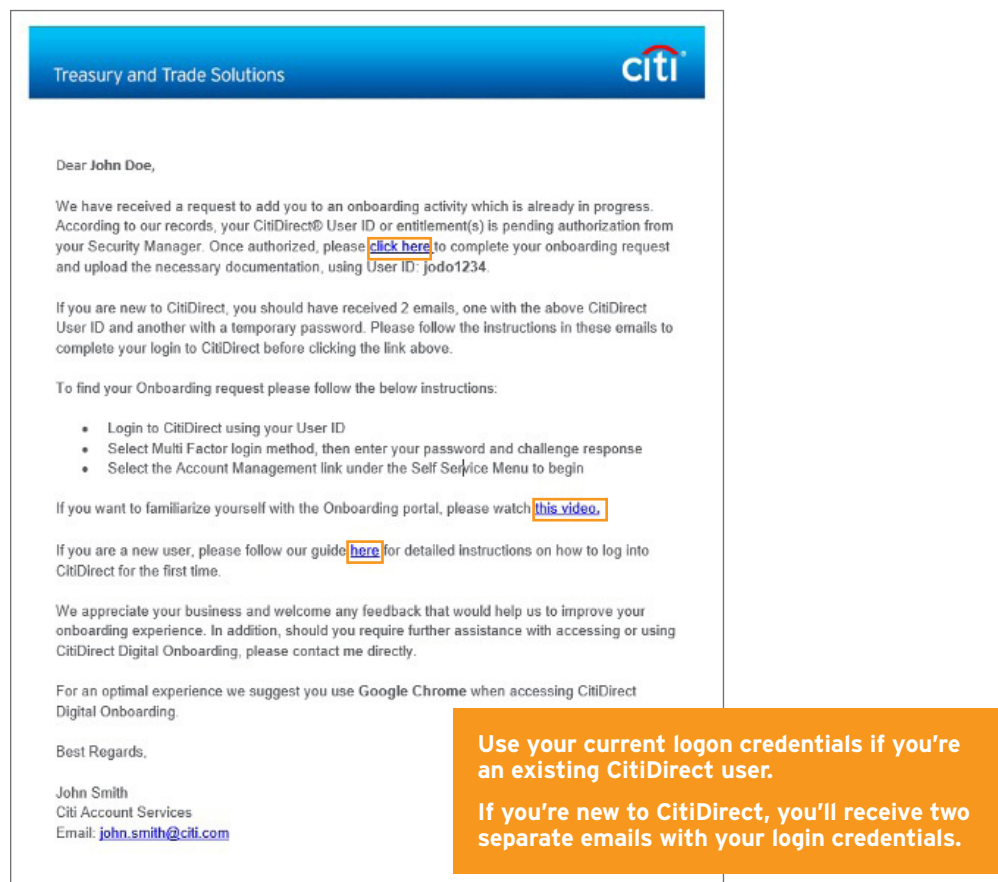
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## Getting Started

Follow the link in the email from Citi Account Services to get started with CitiDirect Digital Onboarding.

### Citi Account Services Email



Treasury and Trade Solutions 

Dear **John Doe**,

We have received a request to add you to an onboarding activity which is already in progress. According to our records, your CitiDirect® User ID or entitlement(s) is pending authorization from your Security Manager. Once authorized, please [click here](#) to complete your onboarding request and upload the necessary documentation, using User ID: jdoe1234.

If you are new to CitiDirect, you should have received 2 emails, one with the above CitiDirect User ID and another with a temporary password. Please follow the instructions in these emails to complete your login to CitiDirect before clicking the link above.

To find your Onboarding request please follow the below instructions:

- Login to CitiDirect using your User ID
- Select Multi Factor login method, then enter your password and challenge response
- Select the Account Management link under the Self Service Menu to begin

If you want to familiarize yourself with the Onboarding portal, please watch [this video](#).

If you are a new user, please follow our guide [here](#) for detailed instructions on how to log into CitiDirect for the first time.

We appreciate your business and welcome any feedback that would help us to improve your onboarding experience. In addition, should you require further assistance with accessing or using CitiDirect Digital Onboarding, please contact me directly.

For an optimal experience we suggest you use **Google Chrome** when accessing CitiDirect Digital Onboarding.

Best Regards,

John Smith  
Citi Account Services  
Email: [john.smith@citi.com](mailto:john.smith@citi.com)

**Use your current logon credentials if you're an existing CitiDirect user.**  
**If you're new to CitiDirect, you'll receive two separate emails with your login credentials.**

### If you already have a CitiDirect user ID

Your company's CitiDirect Security Manager will need to approve your additional entitlement via the Security Management module.

Once done, follow the link in the email you receive from Citi Account Services to upload required documents and complete your new account setup.

For instructions on how to login to CitiDirect with CitiDirect Mobile Token, please see page [7](#). If you are logging in with MobilePass or a physical token, please refer to page [8](#).

### If you are a new CitiDirect user

You will receive two emails. The first will provide your login ID, and the second will include a temporary password required to access your account.

You will receive a third email from Citi Account Services containing a link for you to upload required documents and complete your new account setup.

The following pages will cover logging into CitiDirect for the first time.

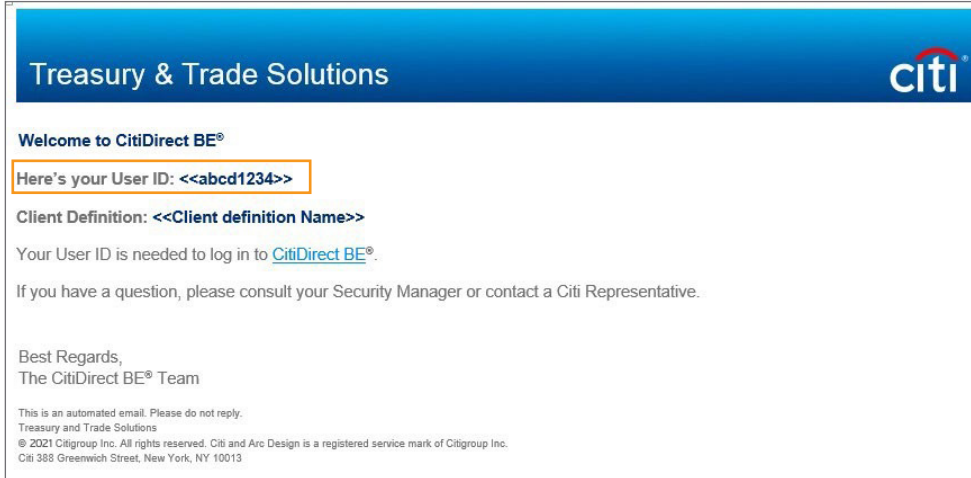
*Screenshots are for illustrative purposes only.*

# New CitiDirect Users

Follow the login steps outlined in the next few pages.

## New CitiDirect User

1. If you are new to CitiDirect, you will receive two emails. The first will provide your login ID and the second will include a temporary password.



The screenshot shows an email header with "Treasury & Trade Solutions" and the Citi logo. The main body of the email contains the following text:

**Welcome to CitiDirect BE®**

Here's your User ID: <<abcd1234>>

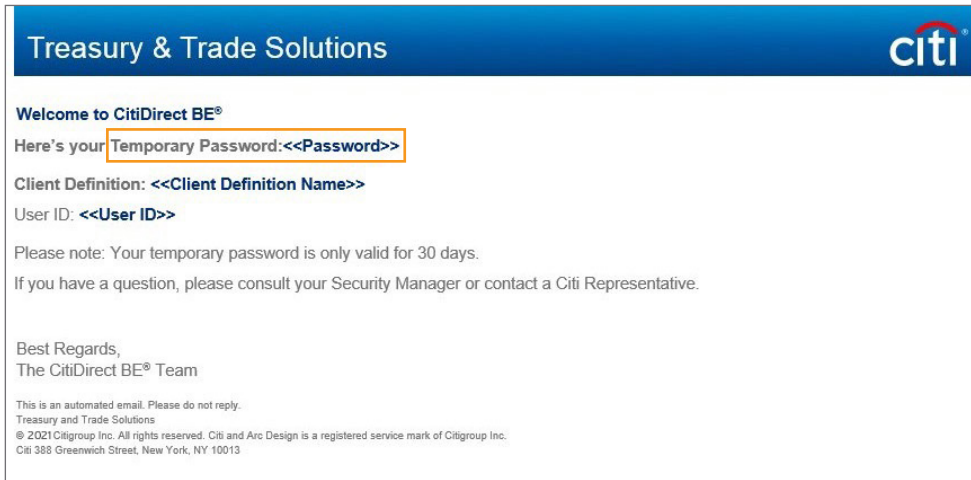
**Client Definition:** <<Client definition Name>>

Your User ID is needed to log in to [CitiDirect BE®](#).

If you have a question, please consult your Security Manager or contact a Citi Representative.

Best Regards,  
The CitiDirect BE® Team

This is an automated email. Please do not reply.  
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Citi 388 Greenwich Street, New York, NY 10013



The screenshot shows an email header with "Treasury & Trade Solutions" and the Citi logo. The main body of the email contains the following text:

**Welcome to CitiDirect BE®**

Here's your Temporary Password:<<Password>>

**Client Definition:** <<Client Definition Name>>

User ID: <<User ID>>

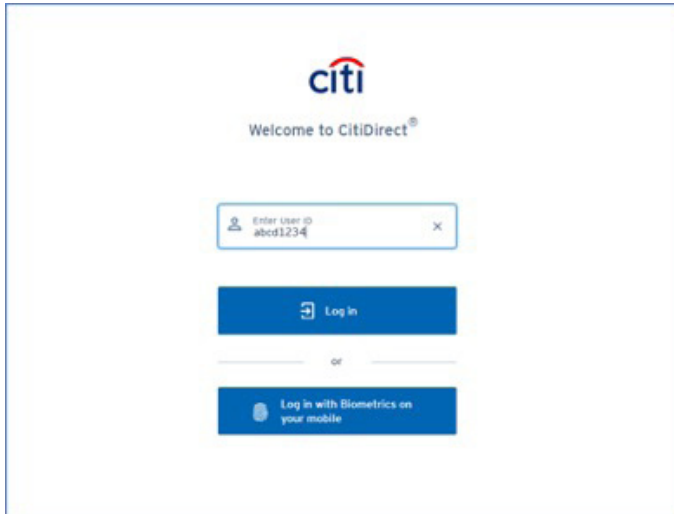
Please note: Your temporary password is only valid for 30 days.

If you have a question, please consult your Security Manager or contact a Citi Representative.

Best Regards,  
The CitiDirect BE® Team

This is an automated email. Please do not reply.  
Treasury and Trade Solutions  
© 2021 Citigroup Inc. All rights reserved. Citi and Arc Design is a registered service mark of Citigroup Inc.  
Citi 388 Greenwich Street, New York, NY 10013

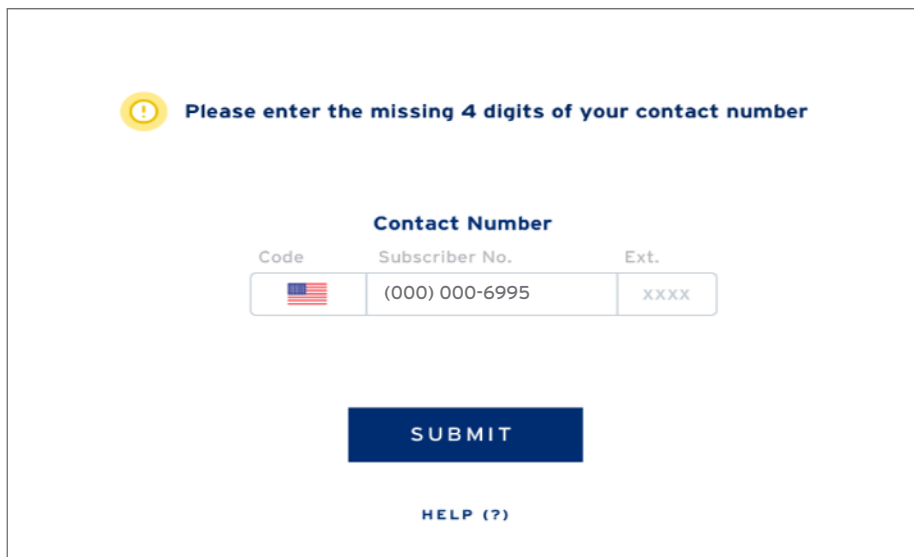
- Go to CitiDirect and enter your username and temporary password. You will be promoted to change your password and set up CitiDirect security questions.



**Please note:** Our temporary password is only valid for 30 days. If your password has expired, please contact your Citi Representative or Security Manger to re-issue a new temporary password.

### New CitiDirect User Multi Factor Authentication Process

- Next, you will be promoted to set up your multi factor authentication credential. To begin, please confirm your identity by providing the missing 4 digits of your contact number.



- Please choose your credential type – mobile token, which can be installed on a mobile device, or physical token, which will be mailed to you. This credential will be required each time you log into CitiDirect.

## Credential Registration

For full functionality, please select an additional login credential

Choose a Login Method    Verify Contact Details    Confirmation

### Mobile Token

Mobile Token options include the use of your phone with a **mobile-based security App** or for sending a **One-Time-Code** via **SMS/text** or **voice message**. Further setup instructions will be sent via email.

### Physical Token

A Physical Token is a **separate hardware device**. We will send the device to you in the **mail**. (Delivery takes 3 - 5 business days).

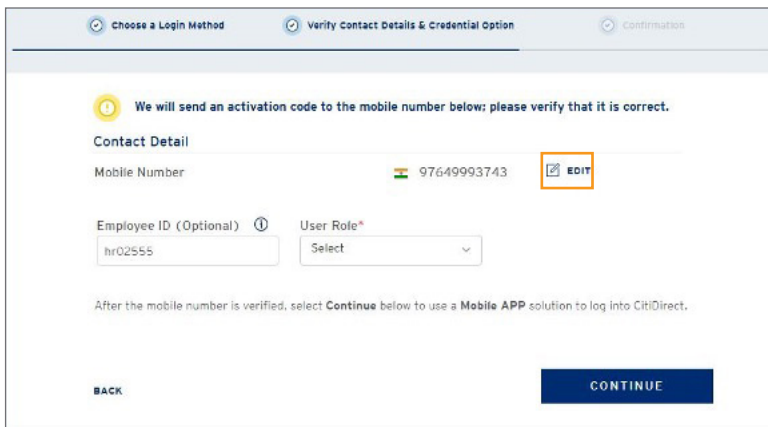
**MobilePass is the recommended credential as it can be set up quickly. Physical Token delivery can take 3 - 5 days or may be otherwise restricted. Additionally, some countries will charge a fee for physical tokens.**

If you select a Mobile Token, depending on the country where the client definition is domiciled, you will be either directed to CitiDirect's Mobile Token or MobilePass set up. To learn more about our mobile token experiences, please check out these resources:

- [CitiDirect Mobile Token Video](#)
- [CitiDirect Mobile Token FAQ](#)
- [MobilePASS FAQs](#)

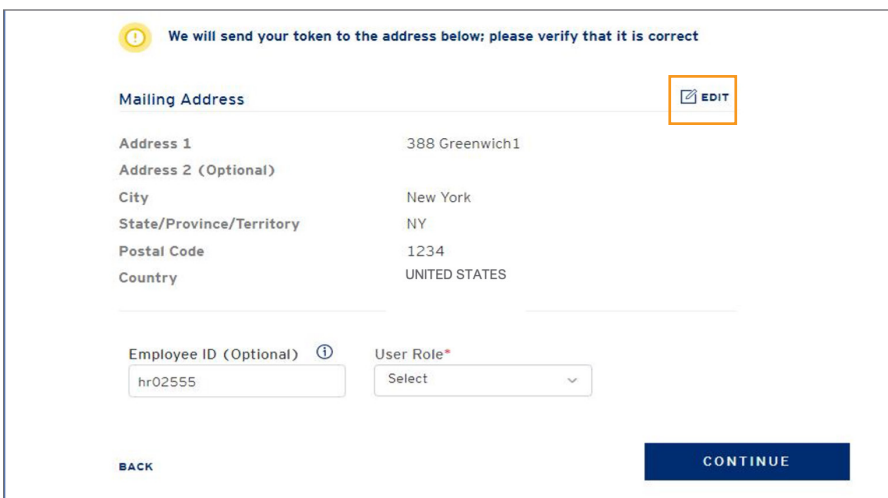
- 5a. If you select mobile token, please confirm your mobile phone number and select user role. If required, please select the edit icon to make amendments.

You will receive an email with instructions for setting up CitiDirect Mobile Token or Mobile Pass depending on the country where the client definition is domiciled. The following pages include set up instructions.



Select your country code and enter your mobile number (please drop the 0 before your number when entering your mobile number). You will receive an SMS text message at the number entered here.

- 5b. If you select physical token, please confirm your mailing address and select user role. If required, please select the edit icon to make amendments. You should expect to receive the token and PIN separately in 3-5 business days (some countries may take longer).



## CitiDirect Mobile Token Set up

If you select mobile token and are directed to CitiDirect Mobile Token, you will receive an activation email with instructions on how to set up your token. Instructions for activation and log in are outlined below. [Video instructions can be found here.](#)



### CitiDirect Mobile Token Set Up

1. To start, download the CitiDirect BE Mobile app on your device.
2. Enter the user id. You should have received a separate email from CitiDirect with your user id.
3. Open the activation email and follow the instructions to activate with a QR Code. If you are unable to use the QR Code, please use the activation code listed in the email.
4. Verify your account by sending a SMS to your mobile phone. Enter the 8 digit code received by SMS. If needed you can resend the code to yourself.
5. Finally set a passcode. Please remember this code as it will be required when you login. After this step, you are all set to login to your account.

### How to Log into CitiDirect with CitiDirect Mobile Token

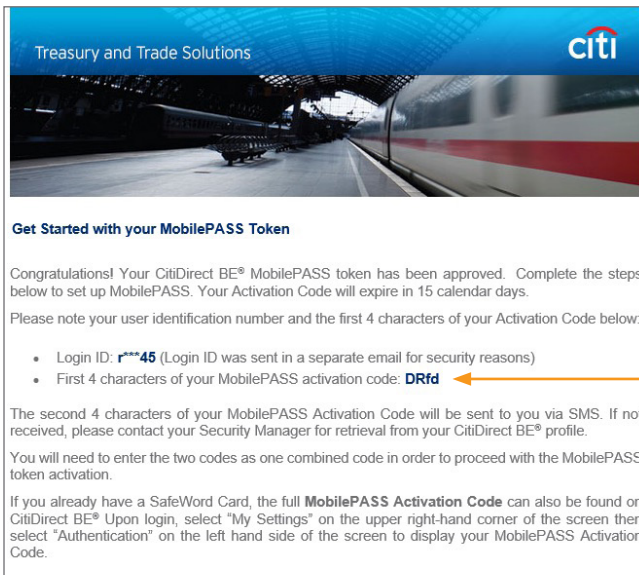
Please refer to step by step illustrative instructions for CitiDirect login [here](#) or follow the instructions outlined below.

1. Open [citidirect.com](http://citidirect.com) on your computer, input your user ID and click "login" to login with QR Code.
2. QR code and instructions will appear on the screen. If prompted, please enter the password.
3. Open CitiDirect Mobile and select "Desktop Login" option and enter your passcode (set up during activation)
4. Scan the QR Code displayed on your computer with the app.
5. Enter the one-time response on the computer and you will be logged in.

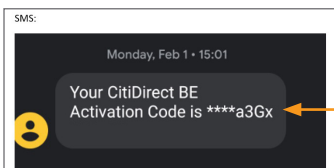
# MobilePASS Set up

## New CitiDirect User Multi Factor Authentication Process – MobilePASS

1. If you select mobile token and are directed to MobilePASS, you will receive an email and text (SMS) message with instructions on how to set up MobilePASS. The email will contain the 1st 4 characters of your MobilePASS Activation code and the text message will contain the 2nd 4 characters of your MobilePASS Activation code.

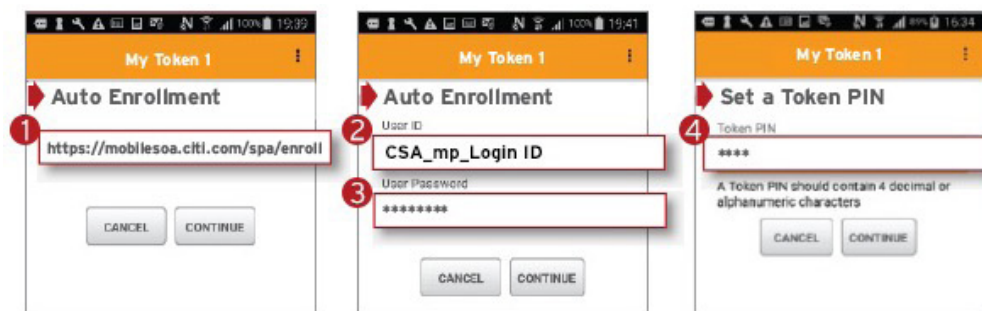


1st 4 characters



2nd 4 characters

2. Download and launch the "SafeNet MobilePASS" app on your smartphone.
3. Follow instructions in the email to enter your enrollment string, User Id, and User Password (your password is the MobilePASS activation code from the email + text message).
4. Choose a 4-digit Personal Identification Number (PIN). Re-enter the same PIN and select "Continue."



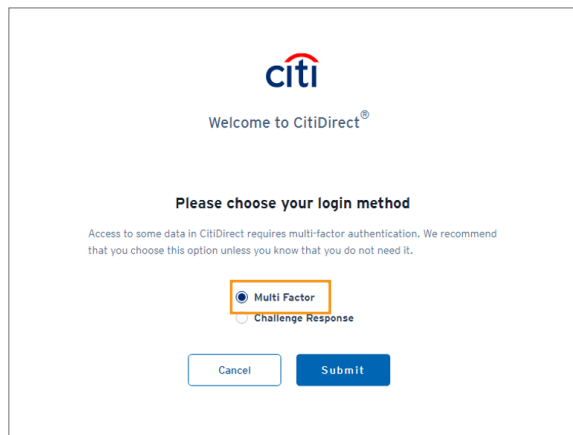
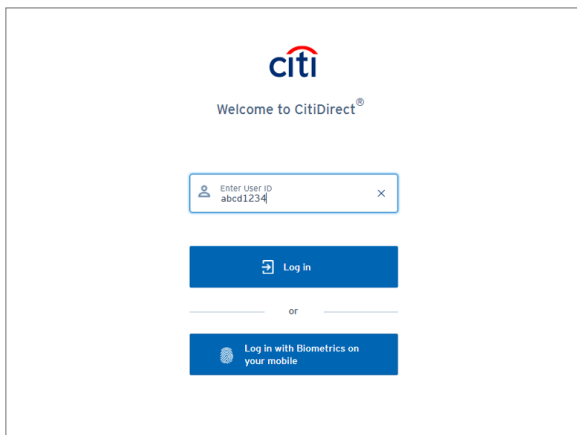
5. Your MobilePASS is now set up. You will have to use your PIN to unlock your MobilePASS each time you need to enter a challenge code to login to CitiDirect.

Screenshots are for illustrative purposes only.

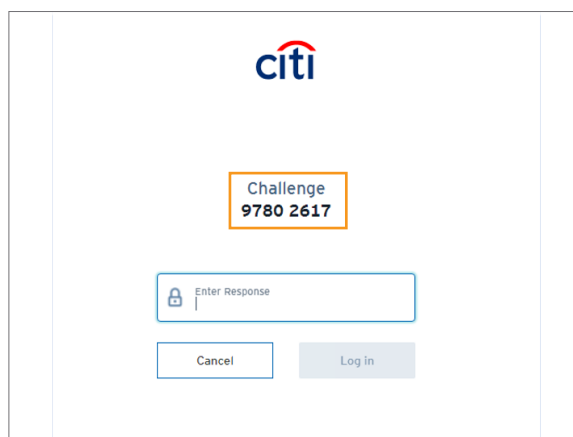
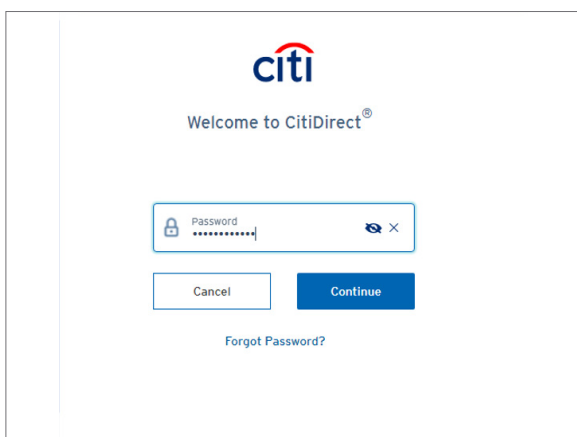
# Logging into CitiDirect with MobilePass or Physical Token

Follow these steps to login with a multi-factor authentication method.

1. Enter in your CitiDirect User ID and select "Continue."
2. Select "Multi Factor" as your login method. Select "Submit."



3. Enter your secure password and select "Continue."
4. Enter the Challenge Code into your SafeNet MobilePASS Token (app) or your physical token. Then enter the response into the field on CitiDirect and select "Sign In."



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