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User Guide Overview

Document Scope
This CitiManager® Site User Guide provides detailed step-by-step instructions for the most common CitiManager Site functions used by Cardholders.

Your Access and Configuration 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.
Navigation Overview

Basic Navigation

Key Concepts

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 account — including your credit limit, total balance and available credit. You can also view recent transactions that have posted since your last statement. Use the navigation options from the header and the side navigation bar as well as quick links to navigate to additional account information and preferences.

Home Screen

<table>
<thead>
<tr>
<th>Screen</th>
<th>Descriptions</th>
</tr>
</thead>
</table>
| Header | 1. View your company. If you have access to more than one, you may select it using the drop-down list.  
2. Access My Profile functions or sign out of the CitiManager Site.  
3. View the Message Board.  
| Screen Components | 4. View high-level account metrics such as credit limit, available credit, current balance and amount due. If your organization allows you to make payments, the Make a Payment link displays. For centrally billed accounts, the amount due by your company displays.  
5. Use the account drop-down arrow to toggle between card accounts if you have more than one.  
6. Use the quick links to navigate to the Statements and Alerts screens.  
7. View list of transactions that posted since your last statement.  
8. Use the search field to perform a basic transaction search by the details, amount or date or click the Advanced Search link to narrow your search.  
9. Click the > Forward arrow to navigate to the Statements screen.  |
10. Click the **Home** button to return to the **Home** screen.

11. Click the **Cards** button to view an overview of your card account, payment information, statements, aging of balance, recent transactions and your card contact information.

12. Click the **Statements** button to select a monthly statement to view and also view recent activity, change your paperless settings and view disputes.

13. Click the **Resources** button to view messages, access FAQs and Links & Help.

14. Click the **Tools** button to navigate to other online tools if you have access.

15. Click the **Alerts** button to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.
My Profile Overview

Description

The My Profile screen allows you to access links that are used to view your user role, hierarchy and entitlements. Additionally, you may update the following depending on your entitlements:

- CitiManager Site contact details
- User preferences such as language, date and time format and currency
- Password
- Reset challenge questions
- Merge CitiManager Site user names if you have more than one
- Change your primary company if you are assigned more than one
- Link/Unlink another card account
- Assign/Unassign Alternate user
- View application and maintenance request history

My Profile Screen

<table>
<thead>
<tr>
<th>Screen</th>
<th>Descriptions</th>
</tr>
</thead>
</table>
| ![My Profile Screen](Image) | 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. |
Card Details Overview

Description

The Card Details screen provides a high-level summary of your card account information including the following:

- **Card Overview**: Card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code
- **Payments**: Last payment made, next payment due, view history (if entitled)
- **Statements**: Recent transaction activity, previous statements
- **Aging of balance information (1 - 120 Days)**
- **Contact information associated with your card/statement**

Depending on your program and company’s settings you may also be entitled to perform account maintenance, request a refund and view refund requests.
## Card Details Screen

<table>
<thead>
<tr>
<th>Screen</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. View card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code and payment information.</td>
<td></td>
</tr>
<tr>
<td>2. Links to recent transaction activity, and current and previous statements.</td>
<td></td>
</tr>
<tr>
<td>3. Aging of balance information (1 – 120 Days).</td>
<td></td>
</tr>
<tr>
<td>4. Contact information associated with your card/statement.</td>
<td></td>
</tr>
<tr>
<td>5. Links to perform card maintenance and request a refund, if entitled.</td>
<td></td>
</tr>
</tbody>
</table>
Statements Overview

Description

The Statements screen displays an overview of your recent transactions, your current statement or a statement from the previous 36 months.

You can also download your statement and dispute a transaction if it billed to your statement within the previous 60 days.

Statements Screen

<table>
<thead>
<tr>
<th>Description</th>
<th>Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The Statements section displays an overview of your statement and allows you to toggle between statements by clicking the icon for the statement date.</td>
<td><img src="image" alt="Statements Screen" /></td>
</tr>
<tr>
<td>2. If you have more than one card account, use the drop-down arrow to toggle between card accounts.</td>
<td></td>
</tr>
<tr>
<td>3. The overview section provides balance and payment information for the dates displayed.</td>
<td></td>
</tr>
<tr>
<td>4. A list of billed or recent transactions for the statement display.</td>
<td></td>
</tr>
<tr>
<td>5. Use the search field to perform a basic transaction search by the details, amount or date or click the Advanced Search link to narrow your search.</td>
<td></td>
</tr>
<tr>
<td>6. Click the Download link to download a statement.</td>
<td></td>
</tr>
<tr>
<td>7. The list of transactions will display the transaction date, posting date, details and amount.</td>
<td></td>
</tr>
<tr>
<td>8. To view additional transaction detail or dispute a transaction, click the ellipsis (…) link that displays on the right-side of the row you wish to expand.</td>
<td></td>
</tr>
<tr>
<td>9. Click the Dispute button to dispute a transaction. The row must be expanded to view the dispute button.</td>
<td></td>
</tr>
</tbody>
</table>
Getting Started

What is CitiManager?

Description

The CitiManager Site is a powerful online tool that allows Cardholders to view and manage their account at any time. Based on your company’s set up, some of the key self-service activities may include:

• Retrieve a forgotten username or password
• View recent activity and current and past statements
• View credit limits, total balances and transaction level detail
• Make a payment
• Request a refund
• Manage e-mail and mobile alerts
• Dispute a transaction and view the dispute once it’s submitted
• Manage preferences and update contact information

For companies that have the Registration ID and Passcode feature turned on, the CitiManager Site will send you Registration ID and Passcode e-mails once activity is recorded on your Cardholder account. Once received, you can complete the CitiManager Site self-registration process to access your account details.
Apply for 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.

Once you have submitted your application, you will receive a confirmation message 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 during the application process to log in and navigate to My Profile > Request History. Refer to the View Application and Maintenance Request History topic in this user guide for additional information.

Once your card application is approved, the account will be linked to the CitiManager Site username and password that was created during the application process. This will allow you to log in to the CitiManager Site to view balances, credit limits, statements and perform other self-service tasks.

Step-by-Step Instructions

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">CitiManager Site Login Screen</a></td>
<td>1. Navigate to <a href="http://citimanager.com/login">citimanager.com/login</a>.</td>
</tr>
<tr>
<td></td>
<td>2. From the CitiManager Site Login screen, click the Apply for Card link. The User Registration - Passcode screen displays.</td>
</tr>
</tbody>
</table>

[![CitiManager Site Login Screen](#)](#)
### Screen

<table>
<thead>
<tr>
<th>Screen Description</th>
<th>Step/Action</th>
</tr>
</thead>
</table>
| User Registration Screen | 3. Select the Invitation Passcode radio button.  
4. Click the Continue button.  
The User Registration – Invitation Passcode/Inviter’s Email screen displays. |
| User Registration – Invitation Passcode/Inviter’s Email Screen | 5. In the Invitation Passcode field, type the Invitation Passcode that was provided to you by your Program Administrator.  
6. In the Inviter’s Email Address field, type the Inviter’s Email address that was provided to you by your Program Administrator.  
7. Click the Continue button.  
The User Registration – User Profile screen displays. |
8. To create your CitiManager Site User Profile, complete the required fields indicated by an asterisk (*).

**Note:** The password and username requirements display in a window as you type your password. An X displays until the requirement is fulfilled.

9. Click the **Continue** button.

A confirmation message displays.

The CitiManager Site will send an e-mail confirming the registration and username created.

10. Click the **OK** button.

*The User Registration – Country and Language screen displays.*
### Screen

#### User Registration Screen — Country and Language

**Step/Action**

11. **The Select country and Select language fields should be pre-populated based on what was entered in the User Profile screen. Click the Continue button.**

   *The Card Application Details screen displays.*

12. **Complete the required fields in all sections of the application. Required fields are indicated by an asterisk (*).**

---

#### Card Application Details Screen
<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card Application Details Screen — Submit</td>
<td>13. When you are finished, click the <strong>Submit</strong> button that displays at the bottom of the screen. An application submission confirmation message displays.</td>
</tr>
<tr>
<td>Citi® Commercial Cards</td>
<td>14. Click the <strong>OK</strong> button. The CitiManager Login screen displays. <strong>Note:</strong> The approving Supervisor or Program Administrator will receive an e-mail indicating your application is awaiting their approval.</td>
</tr>
</tbody>
</table>
Self-register as a Cardholder

Key Concepts

As a Cardholder it’s possible to self-register for the CitiManager Site so you can view your account information, view statements and balances and perform other self-service tasks such as updating your alerts.

There are two possible self-registration options for Cardholders. The option used is based on your organization’s set-up. You will use one of the following options:

- **Registration ID and Passcode** – If your organization uses this option, Citi will send you 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 exactly what appears on your billing statement.

Step-by-Step Instructions

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. From the CitiManager Site Login screen, click the Self-registration for Cardholders link.</td>
<td>2. From the CitiManager Site Login screen, click the Self-registration for Cardholders link.</td>
</tr>
<tr>
<td>The Self-registration for Cardholders screen displays.</td>
<td>The Self-registration for Cardholders screen displays.</td>
</tr>
</tbody>
</table>

3. Select the Registration ID/Passcode radio button, click the Continue button and proceed to Step 4, OR

3. Select the Fill the card’s data radio button, click the Continue button and proceed to Step 7.
### Screen

#### Self-registration for Cardholders

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>4. In the <strong>Registration ID</strong> field, type the Registration ID supplied in the e-mail sent from Citi.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>5. In the <strong>Registration Passcode</strong> field, type the Passcode supplied in the e-mail sent from Citi.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>6. Click the <strong>Continue</strong> button and proceed to Step 11. The Sign on Details screen displays.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>7. In the <strong>Card number</strong> field, type your card number exactly as it appears on your billing statement, no spaces or dashes.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>8. In the <strong>Account name</strong> field, type your account name exactly as it appears on your billing statement.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>9. In the <strong>Contact details</strong> section, enter the billing address for your card exactly as it appears on your billing statement. An asterisk (*) indicates a required field.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td><strong>Note:</strong> If you use a nine-digit zip code, enter all nine digits.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>10. Click the <strong>Continue</strong> button. The Sign on details screen displays.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>11. Complete the required fields (*) for self-registration. <strong>Note:</strong> The username and password requirements display in a pop-up window as you enter them. An X displays until the requirement has been fulfilled. The fields displayed and the username and password requirements vary based on your company’s setup.</td>
</tr>
<tr>
<td><img src="image" alt="Self-registration for Cardholders Screen" /></td>
<td>12. When you are finished, click the <strong>Continue</strong> button. The Recap screen displays.</td>
</tr>
</tbody>
</table>

---

**Note:**

- The fields displayed and the username and password requirements vary based on your company’s setup.
- The Recap screen displays.
### Screen

#### Recap Screen

<table>
<thead>
<tr>
<th>Screen Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username: newuser01</td>
</tr>
<tr>
<td>Card number: XXXXXXXXXX037209</td>
</tr>
<tr>
<td>Account name: Ben Jacob</td>
</tr>
<tr>
<td>Contact details:</td>
</tr>
<tr>
<td>Address line 1: 435491 MAIN STREET</td>
</tr>
<tr>
<td>Address line 2:</td>
</tr>
<tr>
<td>Town / City: OKLAHOMA CITY</td>
</tr>
<tr>
<td>State/Province/Region: OK</td>
</tr>
<tr>
<td>Zip/Postal code: 73112-6400</td>
</tr>
<tr>
<td>Email Address: <a href="mailto:BAJacob@gmail.com">BAJacob@gmail.com</a></td>
</tr>
<tr>
<td>Cell Mobile Phone Number:</td>
</tr>
</tbody>
</table>

### Step/Action

13. Review the information that displays and when you are finished, click the **Confirm** button.

   *The Confirmation message screen displays.*

14. Click the **OK** button.

   *The CitiManager Site Login screen displays.*

**Note:** Use the Username and Password you created to log in to the CitiManager Site. When you log in for the first time, you will be asked to select and answer three challenge questions. You will be asked to answer one of the challenge questions each time you log in.
Log In/Out of 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 login process. The CitiManager Site will assess the risk based on your previous login 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 Cardholder topic in this user guide.

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

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CitiManager Site Login Screen</td>
<td>1. Navigate to citimanager.com/login.</td>
</tr>
<tr>
<td></td>
<td>2. From the CitiManager Site Login screen, type your Username and Password in the required fields.</td>
</tr>
<tr>
<td></td>
<td>3. Click the Login button.</td>
</tr>
<tr>
<td></td>
<td>The Challenge Question screen displays.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If the system determines it necessary, the One-time Passcode receipt option screen displays. Otherwise, the Challenge Question screen displays. If a one-time passcode is required, select a receipt option and then enter the eight-digit passcode once it is received.</td>
</tr>
<tr>
<td>Screen</td>
<td>Step/Action</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| 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. |
| Sign Out | 6. From the CitiManager Site header, click the Sign Out link.  
The screen refreshes and the CitiManager Site Login screen displays. |

**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 retrieve your password, the following information is required:

- A valid username
- The last six digits of your account number

**Step-by-Step Instructions**

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
</table>
| 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. In the **Enter the code in the image** field, enter the CAPTCHA code displayed in the shaded image.
   - **Note:** To listen to the CAPTCHA code, select the **Select Audio Challenge** checkbox and click the **Play Audio** button.
7. Click the **Continue** button.
   - The Challenge Question screen displays.

### Challenge Question Screen

8. 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 Screen

9. Enter and confirm your **New password**.
   - **Note:** The password requirements display in a pop-up window as you enter them.
   - An X displays until the requirement has been fulfilled.
10. Click the **Save** button.
    - Your new password is saved and the CitiManager Site Login screen displays.
Retrieve Forgotten Username

Key Concepts

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

To retrieve your username, the following information is required:

• Your full account number
• The embossed name as it appears on your card

Step-by-Step Instructions

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CitiManager Site Login Screen</td>
<td>1. Navigate to citimanager.com/login.</td>
</tr>
<tr>
<td>CitiManager Site Login Screen</td>
<td>2. From the CitiManager Site Login screen, click the Forgot username? link.</td>
</tr>
<tr>
<td>CitiManager Site Login Screen</td>
<td>The Forgot sign on – username screen displays.</td>
</tr>
</tbody>
</table>
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. In the **Enter the code in the image** field, enter the CAPTCHA code displayed in the shaded image.
   
   **Note:** To listen to the CAPTCHA code, select the **Select Audio Challenge** checkbox and click the **Play Audio** button.
7. Click the **Continue** button.
   
   *The Challenge Question screen displays.*

8. 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 email with the correct username to the email address on file.*
My Profile

Update User Preferences

Key Concepts

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

- Help Desk verification question and answer
- Language
- 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

1. From the CitiManager Site header, click the My Profile link that displays under your name.

   The Contact Information screen displays.
<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
</table>
| **My Profile Screen — Contact Information** | 2. Click the **User Preferences** link.  
*The User Preferences screen displays.* |
| **My Profile Screen — User Preferences** | 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.  
* A confirmation message displays at the top of the screen.* |
View Application and Maintenance Request History

Key Concepts

You can view information about your account application and maintenance requests including the following information:

- Request ID
- Status
- Request Type
- The date the request was last modified
- Audit information such as which fields have changed, when they were updated and by whom.
- Hierarchy

It is also possible to download the Online Application Report, which provides a history of the request.

Step-by-Step Instructions

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Screen</strong></td>
<td>1. From the CitiManager Site header, click the My Profile link that displays under your name. The Contact Information screen displays.</td>
</tr>
<tr>
<td><strong>My Profile – Contact Information</strong></td>
<td>2. Click the Request History link. A list of application and maintenance requests display. Note: If there are no requests, a message displays indicating there are no requests for this user.</td>
</tr>
</tbody>
</table>
3. To sort requests, click on header in which you’d like to sort the requests.

4. To view the hierarchy, expand the row for the desired request by clicking the (...) that displays to the right of the screen.

5. To download the Online Application Report:
   a) Click the Download link.
      
      A message displays indicating the report will be cached to your computer.
   b) Click the OK button to close the message.
      
      The browser document options window displays. The location of the Save or Open options vary based on your browser settings.
   c) Either open or save the file to your computer.

6. To view the details of a specific request, from the Request ID column, click the link for the desired request.
   
   The application or maintenance request details display with the approval history.

7. To view additional information from the Contact Information, Additional Information, Spending Controls sections or to view the Citimeter Cardholder Account Agreement, click the + icon from the section header as necessary.

8. To view the Audit Log, scroll to bottom of screen click the View Audit Log button.
   
   The Audit Log displays
9. When you are finished viewing the Audit Log, scroll to the bottom of the screen and click the Back button.
Statements

View and Download Recent Transactions

Key Concepts

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

You can download transactions for individually or centrally billed accounts.

If you wish to print your 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

To View Recent Transactions

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home Screen – View Recent Link" /></td>
<td>1. From the CitiManager Site side navigation bar, position your mouse over the Statements button and then click the View Recent link that displays at the top of the fly-out menu. Recent transaction activity also displays on the Home screen. Click the &gt; More arrow that displays on the right-side of each transaction row to navigate to the Statements – Recent screen. The Statements – Recent screen displays. An overview of the account displays at the top of the screen. Recent activity displays at the bottom of the screen. <strong>Note:</strong> If you have more than one card account, click the account number drop-down arrow in the Statements header to toggle between accounts.</td>
</tr>
</tbody>
</table>

Home Screen – View Recent Link
To search for a specific transaction amount, date or description, type the search criteria in the search field that displays in the upper-right corner of the **Recent Activities** section and click the **Search** button. Click the **Advanced Search** link to access additional search criteria.

*The transactions are filtered by the search criteria entered.*
3. To view additional transaction detail, click the ellipsis (…) link that displays on the right-side of the row you wish to expand. The row expands and additional transaction details display.

Note: The Dispute button displays when the row is expanded.
### Step-by-Step Instructions

**To Download Recent Transactions**

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
</table>
| ![Statements — Recent Transactions Download Link](image1.png) | 1. From the Statements – Recent screen, click the Download link that displays under the Recent Activities header.  
*The download options display in a new window.* |
| ![Statement Screen — Download Options](image2.png) | 2. Select the radio button for the desired download format and click the Download button.  
*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.  
*A download message displays stating that the file will be cached to your computer.* |
3. Click the **OK** button.  
   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.

4. From the browser document option window, click the **Open** button.  
   *The document opens in the selected format.*
   
   **Note:** Once the document is open, you can print it by selecting **Print** from the **File** menu.
View and Download Statements

Key Concepts

You can view either your current statement or a statement from the previous 36 months. You can also view recent transactions that have not billed to your statement.

The Statements screen displays the following information:

- An account, balance and payment overview
- Declining balance details
- A list of transactions that have billed to your account
- Transaction details

From the Statements screen you can also download your statement and dispute a transaction. You can download transactions for individually or centrally billed accounts.

If you wish to print your statement, it’s recommended you download it in PDF format. Once the PDF document is open, you can print it by selecting Print from the File menu.

Step-by-Step Instructions

To View Statements and Transactions

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home Screen - Select Statement Date" /></td>
<td>1. From the CitiManager Site side navigation bar, position your mouse over the Statements button and then click the icon for the statement date you wish to view. Use the Back and Forward (↩️) arrows to navigate between years.</td>
</tr>
</tbody>
</table>

You can also navigate to your statements from the Home screen by clicking the Statements link displayed on the right side of the screen or by clicking the icon for the statement date you wish to view from the Card Details screen.

The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.

Note: If you have more than one card account, click the account number drop-down arrow in the Statements header to toggle between accounts.

To view transactions that have posted to your account but not yet to your statement, click the View Recent link.
2. 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. The transactions are filtered by the search criteria entered.

3. To view additional transaction detail, click the ellipsis (…) link that displays on the right-side of the row you wish to expand. The row expands and additional transaction details display.

Note: The Dispute button displays when the row is expanded.
Step-by-Step Instructions
To Download Statements

<table>
<thead>
<tr>
<th>Screen</th>
<th>Step/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Statements Screen – Download Link" /></td>
<td>1. From the Statements screen, click the Download link that displays under the Billed Transaction header. The download options display in a new window.</td>
</tr>
<tr>
<td><img src="image" alt="Statements Screen – Download Options" /></td>
<td>2. Select the radio button for the desired download format and click the Download button. <strong>Note</strong>: Download options include Comma Separated Value (CSV), Portable Document Format (PDF) or Excel. PDF is the default option. If you intend to print your statement, PDF is the recommended format. A download message displays stating that the file will be cached to your computer.</td>
</tr>
<tr>
<td>Screen</td>
<td>Step/Action</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image" alt="Statements Screen - Download Message" /></td>
<td></td>
</tr>
<tr>
<td>3. Click the <strong>OK</strong> button.</td>
<td></td>
</tr>
</tbody>
</table>

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.
4. From the browser document option window, click the **Open** button.  

    The document opens in the selected format.

    **Note:** Once the document is open, you can print it by selecting **Print** from the **File** menu.
Make a Payment

Key Concepts

If your organization allows it, you can make an online payment. If paying from a Savings account and/or Credit Union, ensure your financial institution supports automated payments.

Before you can make a payment online you must enter your banking account information. The required information includes:

- Your bank routing number
- Your checking or savings account number

You may choose from the following payment amount options:

Payment requests received by 4:00 p.m. Eastern Time (ET) on a bank business day are posted to your Citibank Card account on the same day.

Payment requests received after 4:00 p.m. ET on a bank business day will post the next business day.

Business days are Monday through Friday, excluding federal holidays.

For additional information about viewing your payment history, refer to the View Scheduled and Past Payments (View Payment History) topic in this user guide.

Step-by-Step Instructions

<table>
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</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home Screen - Payments Link" /></td>
<td>1. From the CitiManager Site side navigation bar, position your mouse over the Statements button and then click the Payments link. You can also click the Make a Payment link that displays on the Home screen (under Due in date) or on the Statements screen (under the Payment Due Date). The Payments screen displays.</td>
</tr>
<tr>
<td><img src="image" alt="Home Screen - Payments Link" /></td>
<td>2. Before you can make a payment online, your banking account information must be entered. If the desired pay from account information already exists, go to Step 7. To add a new pay from account, click the Add link from the Select Payment Account header and go to Step 3. The Account Information window displays.</td>
</tr>
</tbody>
</table>
3. From the Account Type drop-down list, select the appropriate pay from account type.

4. In the Bank Routing Number field, type the bank routing code for the account.
   Note: The bank name will automatically populate after you type a valid routing number.

5. In the Pay From Account field, type the account number.

6. Click the Save button.
   The new bank account is added.
   Note: To add another account, repeat Steps 3–6.
   To delete an existing account, select the radio button for the account and then click the Delete link that displays on the right side.

7. To select the desired pay from account, click the appropriate radio button.

8. In the Select Payment Amount section, click the radio button for the desired payment option. If you selected Other amount, type the payment amount in the text entry field.

9. To schedule a payment in the future, type a date or select it from the calendar.

10. To submit your payment, click the Pay button.
    The Confirm Payment screen displays.
11. Review your payment information and click the Confirm button.

The Success screen displays your payment information and a confirmation displays at the top of the screen.

12. Click the OK button.

The Scheduled & Past Payments screen displays.
Alerts

Manage Alert Subscriptions

Key Concepts

As a Cardholder, you can set alerts so notifications are automatically sent via e-mail and/or to your mobile device when certain selected activity occurs on your account, for example, when statements are available and when payments are received.

There are two types of alerts to which you can subscribe:

- **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 you will receive your alerts based on:

- Time zone
- Time of day
- Day of week

Once you have subscribed to mobile alerts in the CitiManager Site, you will receive a confirmation text message on your mobile device with a four-digit PIN. The four-digit PIN must be entered on the PIN confirmation number screen in the CitiManager Site. Once the PIN has been entered, the CitiManager Site will send another text to your mobile device confirming activation. The confirmation text message is sent any time you change or enter a new mobile phone number.

On-Demand Mobile Alerts

In addition, once you have registered your mobile device number in the CitiManager Site, you have full access to on-demand mobile alerts. On-demand mobile alerts allow you to request and receive immediate information such as account balances, payment amounts and due dates. Refer to the Manage On-demand Mobile Alerts topic in CitiManager Cardholder User Guide for additional information.

Step-by-Step Instructions

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home Screen - Alerts" /></td>
<td>1. From the CitiManager Site side navigation bar, position your mouse over the Alerts button and then click the Alerts Subscription link. The Alerts Subscription screen displays.</td>
</tr>
</tbody>
</table>
2. To enter/edit the email address(es) where you want alerts sent, click the **Email Addresses — Edit** link and complete the following steps when the **Email Address Preferences** window opens:
   a) Type and confirm up to five email addresses.
   b) Click the **Save** button.
3. To edit your mobile number, your mobile carrier, and your notification preferences, click the Mobile Phone Number — Edit link and complete the following steps when the Mobile Number Preferences screen opens:

   a) In the Country Code and Mobile Number field, type a valid mobile phone number where you wish alerts to be sent. **Note:** Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile.

   b) Click in the Supported Carriers field and select your mobile carrier. **Note:** If Sprint is your carrier, you are 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.

   c) Click in the Preferred Time Zone field and select your preferred time zone.

   d) Click in the From and To fields and select the time-frame in which you would like to receive alerts.

   e) From the list of weekdays, select the days you would like to receive alerts.

   f) Click the Save button.
4. To subscribe to alerts, select the Email Alerts and/or SMS (Mobile Alerts) checkbox(es) for each of the alerts you wish to receive.

To unsubscribe to alerts, deselect the Email Alerts and/or SMS (Mobile Alerts) checkbox(es) for the alerts you no longer wish to receive.

**Note:** Some alerts may be greyed out and unavailable. Available alerts are set by your Program Administrator. Alerts that are selected and greyed out are mandatory.

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.

5. When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox.

**Note:** If you do not agree to the terms and conditions, you will not be able to receive alerts.

6. Click the Save button.

The alerts settings are saved and a confirmation message displays at the top of the screen. The PIN confirmation number screen displays if you elected to receive alerts on your mobile device for the first time or you changed your mobile phone number.

**Note:** If you elected to receive alerts on your mobile device, you will receive a text message with a PIN. On the CitiManager Site PIN confirmation number screen, type the PIN number received on your mobile device in the PIN confirmation number field and click the Confirm button.