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First Time Access to CitiManager

Step-by-step instruction guide

1. To access for the first time you must access the CitiManager site at the following address: https://home.cards.citidirect.com/CommercialCard/Cards.html
   
   **Note:** In the home screen in the upper right corner you can select your preferred language.

2. On the CitiManager Start screen, click the Auto Registration for Cardholders option.
   
   ![Auto Registration for Cardholders](image)

   You will be redirected to the corresponding page for the Registration Process.

3. On this screen you will have two options:
   
   ![Self registration for Cardholders](image)

   - If you select Registration ID / Passcode, proceed to step 4 (the registration ID and passwords will be received after the first transaction with the new card. If the e-mail is deleted, the program administrator will be able to whiten the ID).
   - If you select Fill the card's data, proceed to step 6.
4. You will be redirected to the auto registration page for card users. In the Registration ID and Password field, enter the ID and password you received in the e-mail sent by the CitiManager site from the address citicommercialcards.admin@citi.com.

5. Choose Continue.

6. In the Card number and account name field, enter the card number and name exactly as it appears on your card or account statement.

7. In the Contact Details section, enter the required data.
   
   Note: The address you must include is the billing address for your card. In the postal code field include only the numbers of your postal code without any letter. (Fields marked with an asterisk (*) are required).

8. Choose Continue.

   You will be redirected to the login log screen.

9. In the Username and Password fields, create your username and password that will be used to access CitiManager in the future.

   Note: Usernames are not case-sensitive and must meet the following requirements:
   • Must be longer than six characters
   • May contain letters, numbers and special characters
   • Cannot contain spaces
   • Cannot contain numbers only

   Note: Passwords are case-sensitive and must meet the following requirements:
   • Must be six to nine characters
   • At least one letter is required
   • They should contain at least one number
   • Cannot contain more than two identical consecutive characters.

10. In the Confirm Password field, re-enter your password.

11. In the Helpdesk verification question, select your preference from the drop-down menu.

12. In the Helpdesk verification response field, enter your response to the Helpdesk verification question that you have selected.

13. Choose Continue.

   Finally, you will be redirected to a registration summary page giving a successful conclusion of the registration.

Important:
• Account blocked: After 180 days of inactivity, your user account will be blocked. To unlock it, you will need to contact Citi Customer Services. Once unlocked, you will be prompted to set a new password, which may not match the last three passwords created.
• Password Expiration: For security reasons, your password will expire after 60 days.
• Replacement Cards: If you lose your card and request a replacement card, your new account details will auto-link to your CitiManager username.

CitiManager portal’s login session

Key Concepts

A username and password are required to access the CitiManager portal (created by you). Before accessing, you can change the portal to Spanish if you wish in the upper right corner. You will find the drop-down with all the languages in the upper right.

Inactivity: After 30 minutes of inactivity, CitiManager will automatically close the session.
Step-by-Step instruction guide

1. Access the citimanager.com/login website.

2. At the login screen of the CitiManager portal, enter your Username and Password in the corresponding fields.

3. Click the Log In button. The Security Question screen will pop up.

4. In the field of the security question, enter the answer to the security question.

5. Choose Continue – The CitiManager Portal Home screen will appear. This means that you have successfully logged in to the CitiManager site.

6. To log out of the CitiManager portal, click Logout at the top right of the screen. The CitiManager Site Login screen will appear.

Reset password

Key Concepts

If you forget your password, you must reset it before you can log in to the CitiManager portal. To reset your password, the following information is required: A valid username and the last six digits of the card number.

Step-by-Step instruction guide:

1. Access the citimanager.com/login website.
2. On the login screen of the CitiManager portal, click on the link Forgot password? The “Forgot password?” Screen appears.

3. Select the Cardholder option button.

4. In the Username field, enter your username.

5. In the Account number (Last 6 digits) field, enter the last six digits of your account number.
6. Choose Continue.

7. Your temporary password will be e-mailed to you from: citicommercialcards.admin@citi.com. Enter that password in the previous password field and then a new password, finally confirm your new password.
   
   **Note:** Your new temporary password will only be active for 48 hours.

   **Note:** Passwords are case-sensitive and must be six to nine characters long. At least one letter is required, must include at least one number.

8. Click the Continue button – The Security Question screen will pop-up.

9. In the field of the security question, enter the answer to the security question and click the Continue button.
   
   **Note:** You have three attempts to answer the security question correctly.

10. Click the Save button – Your new password will be saved and the CitiManager Start screen will appear.

### Username recovery

#### Key Concepts

If you forgot your username, you must retrieve it in order to log in to the CitiManager portal. Your username will be sent to the registered e-mail address. To retrieve your username, the following information is required:

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

#### Step-by-Step instruction guide

1. Go to citimanager.com/login

2. On the CitiManager Login screen, click on the “Forgot username?” link.
   
   The “Forgot username?” login screen appears.

3. Select the Cardholder option button.

4. In the “Name as shown on the card” field, enter your name as it appears on your card.

5. In the “Account number (full number)” field, enter your full account number.

6. Click the Continue button – The Security Question screen will pop-up.
7. In the field of the security question, enter the answer to the security question and click the Continue button.

Note: You have three attempts to answer the security question correctly.

The system will send an e-mail with the correct username to the registered e-mail address.

Homepage

1. Messages: View of the Citi message board.
2. Checking your card accounts: Displays a quick view of the general status of your card accounts, with options for viewing monthly statements and unbilled transactions.
3. Support: External web link to Citi customer service phone numbers.
4. Quick Links: Easy access to the key functions of CitiManager.

View unbilled statement and transactions

Key Concepts

Your statement shows the following information: card details, balances and transaction details. The most recent statement is shown, however past statements can be viewed.

Step-by-Step instruction guide

1. To view your excerpt from the CitiManager Portal Home screen, click the Extract tab. The Extract screen displays the most recent.
2. To display the above statement, select the desired statement from the Statement Date drop-down list. The extract corresponding to the selected date appears.

Card Management Program – Account Maintenance

Key Concepts
As a cardholder you have the ability to update your information via CitiManager. The fields available for maintenance are:

- Work address
- Telephone and office fax number
- E-mail address
- Personal Address
- Personal telephone number
- Cellphone number

Step-by-Step instruction guide
1. Click on Card Details Link (accessible from any window).
2. Select the Card Maintenance link.
3. Select your country and language and click “Show Shape” (The online maintenance form will be displayed).
4. Make the necessary changes.
   a. Make sure you read the help texts to complete the fields.
   b. Some options may not be available depending on your company settings.
5. Click on “Accept”.
   a. If you have any problems with the information entered, the page will be updated and an error message will be displayed at the top edge of the form.
6. To see your pin click “VIEW PIN”. Once inside the link select the form in which you prefer to receive your unique password (the key will be sent according to your preferences). Enter the unique access key you received and see your pin.
Update my profile

In this tab you can modify the data of your user profile and see the current ones.

Note: Personal changes made in the Profile section only affect your CitiManager website profile. Contact Citi Customer Service using the number on the back of your card to update personal information in your card account.

To access from the CitiManager Portal Home screen, click My Profile. The My Profile screen appears with the various options for modifying your profile.
• **Update User Profile:** Allows updating user details. Within the options are the personal data of the account (username), contact details (address, phone number and e-mail). Here also the user will be able to see the faculties that he has available in his profile.

• **Update preferences:** Allows modification of certain preferences of the website, including question and answer verification, language, date and time format, and time zone.

• **Change password:** Possibility to change your current password. **Note:** The CitiManager password does not expire.

• **Reset security questions:** You can change the three security questions and answers, which are randomly asked after the initial login.
  
  **Note:** You will have to respond to your original verification question in order to be able to reset them.

• **User name merge:** Ability to merge the current CitiManager username with an alternate username.
  
  **Note:** When you perform the merge you must make sure that you merge the user who has the least approved functionality into the one with the most functionality. This will allow you to have all of the security privileges (Alternate username security privileges will be added to the primary username with which you are logged on). In case it is the other way around you will lose functionalities since the alternative username will be deactivated once the merge is completed and cannot be reused.

• **Change base company:** Allows you to change the base company that is displayed when entering CitiManager. This functionality is only available when you have more than one program with that user.

• **Alerts:** Allows you to subscribe to alert notifications by e-mail or SMS.

• **Designate Alternative User:** Permits to designate alternative user.

• **Request new card:** Allows you to request a new card.

• **Request history:** Allows you to see history of requests.

**Alert configuration**

**Key concepts**

As the cardholder, you can set up alerts so that notifications are sent automatically via e-mail or to your mobile device when certain selected activity is performed on your account. For example, you will receive notification when your statement is available or when you have reached a certain percentage of your credit limit.
You can receive these alerts either by e-mail or by text message to your mobile device. For SMS alerts only one mobile phone number per user is allowed; while for e-mail alerts it is possible to configure up to five e-mails. It is also possible to choose certain days and times to receive SMS alerts.

**Step-by-Step instruction guide**

1. Click the Alerts link. The Configure Alerts screen appears.
2. Select the desired alerts by e-mail and/or SMS.
   **Note:** Some alerts are likely to be disabled and unavailable. The available alerts are set by your Program Manager.
3. Select the desired alerts by e-mail and/or SMS.
   **Note:** Some alerts are likely to be disabled and unavailable. The available alerts are set by your Program Manager.
4. When selecting any SMS alert, enter your specific country code and mobile number (no spaces) in the “Edit mobile Number” link (upper right hand).
5. If you want to receive your SMS alerts on specific days / times, open the Time Preferences section for SMS alerts.
   **Note:** Mobile alert time preferences are automatically displayed when a mobile alert is selected. If mobile alerts are not selected, the expandable button is disabled.
6. For e-mail alerts, click the Manage e-mail address link.
   The User Profile E-mail Address screen appears.
7. Enter and confirm up to five e-mail addresses and then click the Save button.
   The Configure Alerts screen appears again.
8. To view the audit log, click on the Alerts expandable button: Audit Log.
   The audit log shows the alerts that have been subscribed / canceled in favor of the cardholder.
9. Confirm the Terms and Conditions by clicking the checkbox.

![CitiManager User Guide | Alert configuration](image)
2. Configure alert settings for various scenarios.

4. Set mobile number preference.

6. Specify email address preferences.
Obligatory alerts

CitiManager will by default activate five mandatory alerts that can be disabled by the cardholder from your CitiManager profile. The default alerts are:

- Remaining available credit
- Rejected transactions
- Card activation reminder
- New statement available
- Payment Expiration

Card request with an invitation password

Key Concepts

To request a new card, an Invitation Password and the e-mail address of the person inviting you are required. You can obtain both from your Program Manager. You will receive a confirmation message after completing your request, once the necessary approvals have been received, either from a Supervisor and/or the Program Manager. You can view the status of your request in the CitiManager portal using the username and password created using the steps described below.

Once your card application is approved, the account will be associated with your CitiManager portal username and password that were created during the application process. This will allow you to perform actions on the CitiManager portal, such as viewing and printing extracts.

2. From the CitiManager portal Login screen, click the Request card link. The User Registration screen appears.

  **Important:** If you already possess a CitiManager username, log in to CitiManager and request a new card in the quick links menu.

3. Click the Invitation Password button. Click the Continue button. The Password Verification screen appears.
4. In the Invitation Password field, enter the Invitation Password that was sent to you by your Program Administrator.
5. In the e-mail address field of the invitee, enter the e-mail address that was sent to you by your Program Manager.
6. Click the Continue button. The User Registration screen appears.
7. In the Username and Password fields, create your username and password that will be used to access CitiManager in the future.

  **Note:** Usernames are not case-sensitive and must meet the following requirements:

  1. Must be longer than six characters
  2. May contain letters, numbers and special characters
  3. Cannot contain spaces
  4. Cannot contain numbers only

  **Note:** Passwords are case-sensitive and must meet the following requirements:

  1. Must be six to nine characters
  2. At least one letter is required
  3. Must contain at least one number
  4. It cannot contain more than one identical consecutive characters

8. In the Confirm password field, re-enter the password.

  a. In the help center checklist drop-down list, select the verification question.

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1 In Brazil this functionality has been available since 2016 and in Argentina since 2017.
9. In the help center checklist drop-down list, select the verification question.

10. In the Personal Information section, fill in the required fields.

   **Note:** The asterisk (*) indicates that the field is mandatory. Required fields are First name, Last name, Country, Contact number, E-mail address of the user profile, and Confirm e-mail address of the user profile.

11. Click the Continue button. The following pop-up message appears: “Your user ID was successfully created. Continue to request a card”.

   **Note:** The CitiManager portal will send an e-mail confirming the registration and the created username.

12. Click the Continue button. The following pop-up message appears: “Your user ID was successfully created. Continue to request a card”.

   **Note:** The CitiManager portal will send an e-mail confirming the registration and the created username.

13. Click the OK button. The country screen appears.

14. Select the country of the currency in which the card will be billed from the drop-down list and then select the language you want.

   **Note:** The list will display only the countries selected by the company.

15. Fill in the required fields in the application.

   **Note:** The asterisk (*) indicates that the field is mandatory; Therefore, that field must be filled in. If you cannot fill in the required fields, you can also save the request as a draft and re-enter later.

16. Rellene los campos obligatorios en la solicitud.

   **Note:** The asterisk (*) indicates that the field is mandatory; Therefore, that field must be filled in. If you cannot fill in the required fields, you can also save the request as a draft and re-enter later.

17. Click the Submit button. A request send confirmation message appears.

18. Click the OK button. The CitiManager Login screen appears.

   **Note:** The Supervisor or Program Manager in charge of approval will receive an e-mail notifying you that your application is pending approval.