CitiManager® Site Agency Program Coordinator

Department of Defense

Quick Start Guide

May 2023

Treasury and Trade Solutions

Table of Contents

Overview

Document Scope

This CitiManager® Site User Guide provides detailed step-by-step instructions for some of the most commonly used CitiManager Site functions available to Agency Program Coordinators (APCs).

Your Access 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.

A Note About Navigation

Most step-by-step instructions in this User Guide assume you are already logged into the CitiManager Site. Refer to the **Log In to CitiManager Site** topic for the steps required to log in.

Unless otherwise noted, the step-by-step instructions begin from the CitiManager Site **Home** screen.

What Is CitiManager?

The CitiManager Site is a powerful online tool that allows Non-cardholders to efficiently manage their card programs. Depending on your agency/organization's setup, you will be able to:

- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations/decline
- View, approve or reject applications
- Perform account maintenance
- Activate and deactivate users
- Assign applications
- Set passcodes
- Manage alerts
- Manage your profile
- Access on-demand training resources in the Learning Center

Compatible Browsers

The CitiManager Site is compatible with the latest versions of Chrome and Edge.

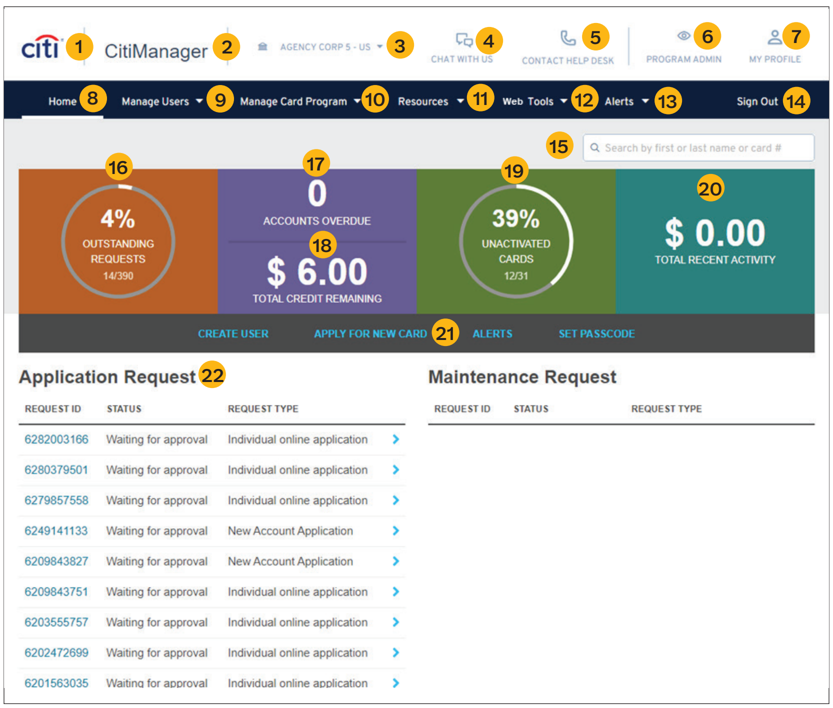
Basic Navigation

Description

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 program — including outstanding requests, accounts overdue, total credit remaining, number of un-activated cards and recent activity.

You can also view a list of application requests. Use the navigation options from the header and the navigation bar as well as quick links to navigate to additional program information and preferences.

Screen



CitiManager Home Screen

Step/Action

Header

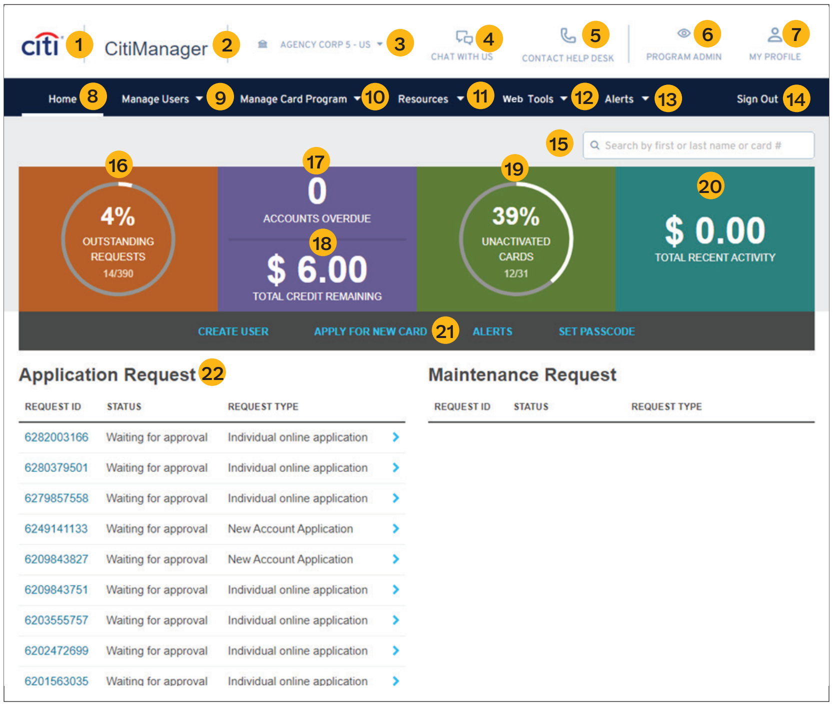
1. Click the **Citi** logo on the far left-side of the header to be directed to the Citi Commercial Cards website.
2. Click the **CitiManager** link on the left-side of the header to return to the **Home** screen.
3. Your agency/organization name displays on the left-side of the header.
4. Click the **Chat With Us** icon to open a chat window with a Helpdesk representative. This link will only display if a chat representative is available.
5. If you need assistance from the Helpdesk, click the **Contact Help Desk** icon that displays on the right-side of the header.
6. If you have both Cardholder and Non-cardholder access to the CitiManager Site, you can toggle between both accounts by positioning your mouse over the role icon that displays on the right-side of the header and selecting the desired role.
7. Click the **My Profile** icon on the far right-side of the header to access or modify your profile details.

Navigation Bar

8. Click the **Home** link to return to the **Home** screen.
9. Position your mouse over the **Manage Users** drop-down menu to view card account details, view recent and billed statements, perform account maintenance, update multiple accounts, view requests, view refund history, perform a user search, print multiple statements and view disputes.

Screen	Step/Action

Screen



CitiManager Home Screen

Step/Action

10. Position your mouse over the **Manage Card Program** drop-down menu to complete hierarchy pull transfers, view transfer hierarchy history, document management, hierarchy, to set alerts, run reports, set passcodes, manage MCCG Template, create new corporate account, and to perform corporate account maintenance. The functions available are based on your agency/organization's setup.

11. Position your mouse over the **Resources** drop-down menu to view messages, access the **Library**, search for users, view **Frequently Asked Questions** and access **Links & Help**.

12. Position your mouse over the **Web Tools** drop-down menu to navigate to various online tools such as **Reporting** and **Transaction Management** if you have the entitlements. You can also access the **Learning Center**.

13. Position your mouse over the **Alerts** drop-down menu to manage your alert subscriptions, view the audit log, and the view on-demand mobile alert information.

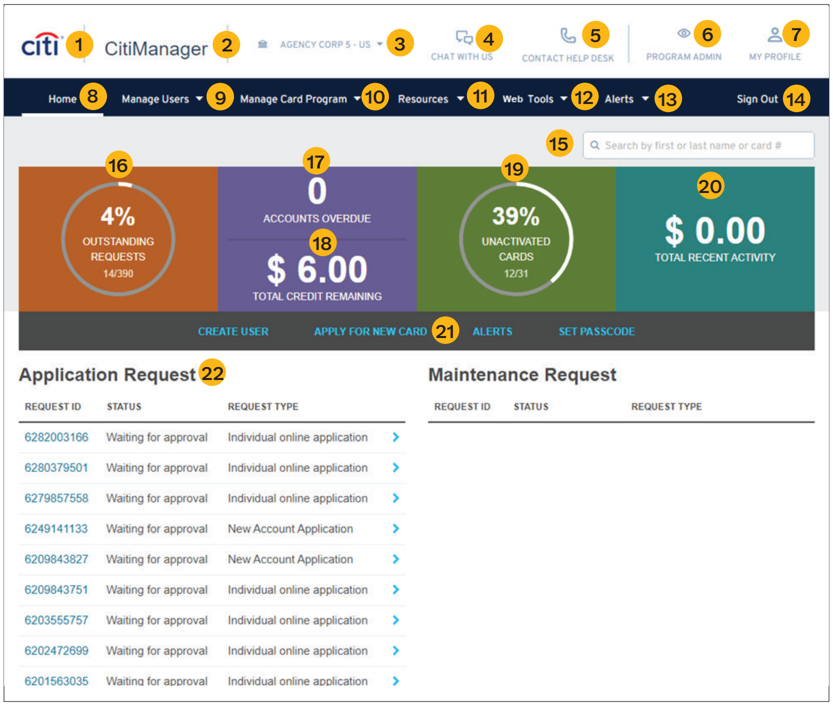
14. Click the **Sign Out** link on the far right-side of the navigation bar to log out of the CitiManager Site.

Screen Components

15. From the search field located below the navigation bar on the right, you may perform a search by typing a name or card account number, and then select an action from the drop-down list such as **Card Accounts**, **User Search** or **View Requests**.

16. The first dashboard tile is **Outstanding Requests** which displays the number of requests that are pending approval when an approval workflow is used by your agency/organization.

Screen | **Step/Action**



CitiManager Home Screen

17. The top of the second dashboard tile is **Accounts Overdue** which displays the number of accounts that are currently past due. The number of accounts displayed is recent from the previous cycle. This applies to individually billed programs only.

18. The bottom of the second dashboard tile is **Total Credit Remaining** which displays the total remaining credit for the hierarchy assigned to you. This applies to centrally billed programs only.

19. The third dashboard tile is **Unactivated Cards** which displays the number of cards that have not been activated. The total includes both open and closed individual accounts. This is not a real-time total — the total displayed is from the previous day.

20. The fourth dashboard tile is **Total Recent Activity** which displays the total amount of activity in the current billing cycle. This is not a real-time total — the total displayed is from the previous day.

21. Use the quick links displayed below the dashboard in the middle of the screen to set your personal alerts and set a passcode.

22. In the **Application Request** section located below the quick links on the left-side of the screen, you can view a list of pending **Application Requests** that are waiting for your review.

Register as an Agency Program Coordinator

Key Concepts

As an APC, it's possible to register for the CitiManager Site so you can manage your card program.

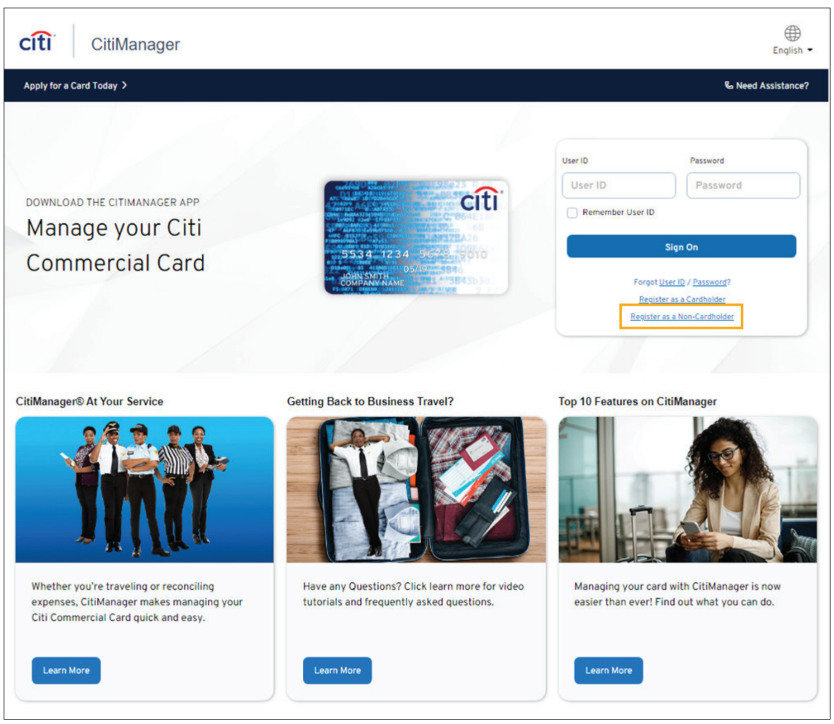
In order to register, an APC must set up a profile first which will generate a Registration ID and a Registration Passcode.

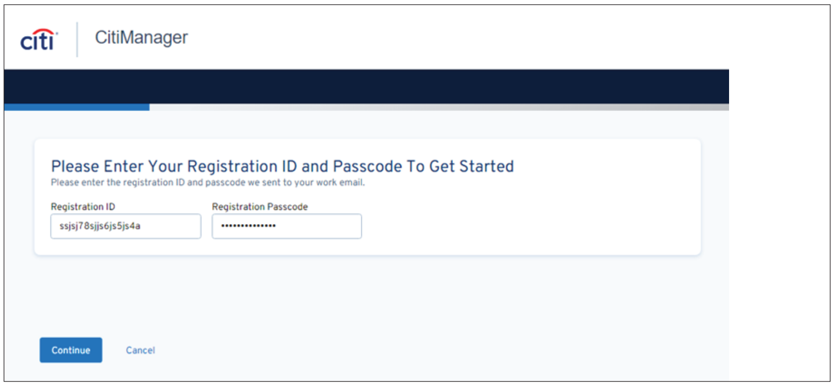
Citi will send one e-mail with your Registration ID and another with your Registration Passcode. These e-mails are required during the registration process.

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.

The Registration ID and Passcode can be re-sent by another APC.

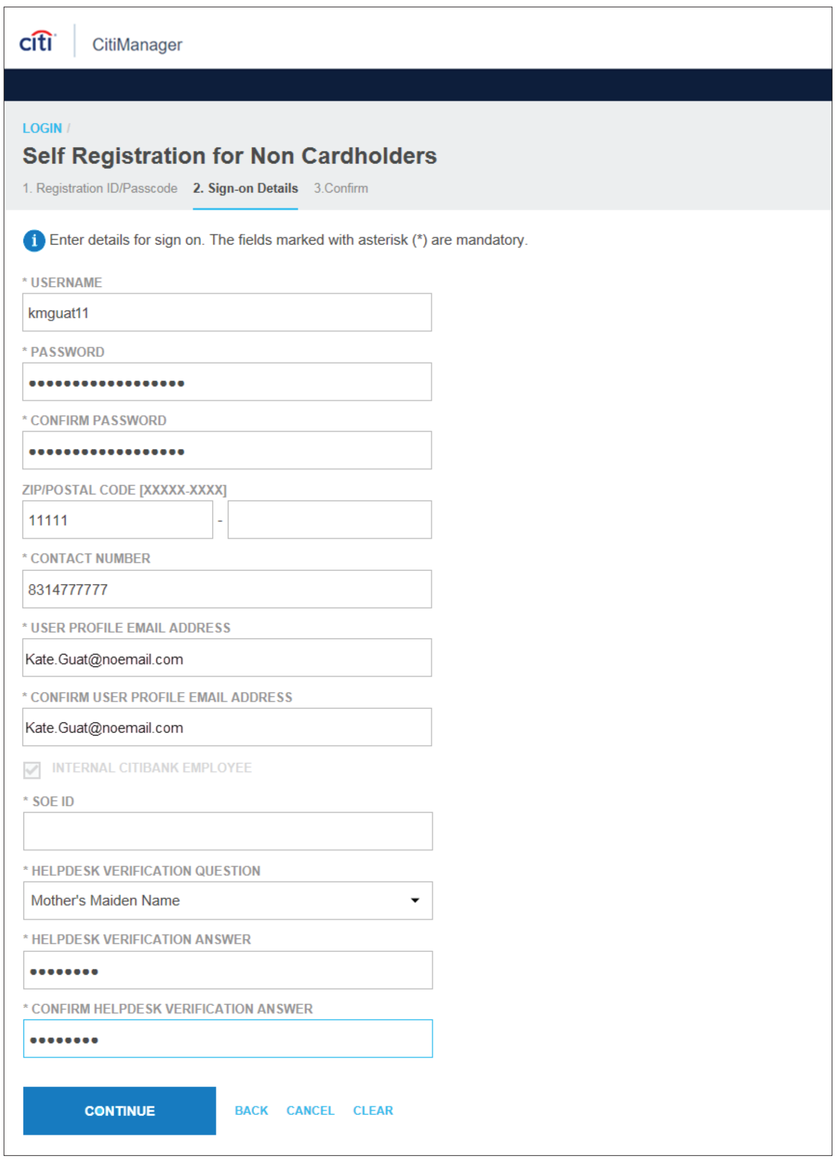
Step-By-Step Instructions

Screen	Step/Action
 **CitiManager Site Login Screen**	1. Navigate to **www.citimanager.com/login**. *The CitiManager Site Login screen displays.* 2. Click the **Register as a Non-Cardholder** link. *The Registration ID/Passcode screen displays.*

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


Registration ID/Passcode Screen
</td><td>

3. In the **Registration ID** field, type the Registration ID supplied in the e-mail sent from the CitiManager Site.
4. In the **Registration Passcode** field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site.
5. Click the **Continue** button.

   The Sign-on Details screen displays.
</td></tr>
<tr><td>


Sign-on Details Screen
</td><td>

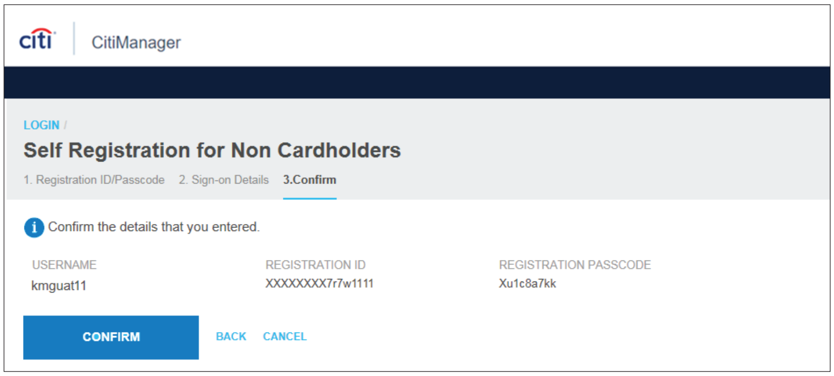
6. In the **Username** field, type your desired username.

   Note: The username requirements display in a window as you type your username. A checkmark displays when the requirement is fulfilled.
7. In the **Password** field, type and confirm a password that meets the requirements.

   Note: The password requirements display in a window as you type your password. A checkmark displays when the requirement is fulfilled.
8. In the **Confirm Password** field, re-type the password.
9. Verify the information in the **Zip/Postal Code**, **Contact Number** and **User Profile Email Address** fields and update if necessary.
10. From the **Helpdesk Verification Question** drop-down list, select a question that will be used to verify your identity should you need to reset your password or retrieve your username.
11. From the **Helpdesk Verification Answer** field, type an answer to the Helpdesk verification question you selected.
12. When you are finished, click the **Continue** button.

    The Confirm screen displays.
</td></tr>
</table>

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>



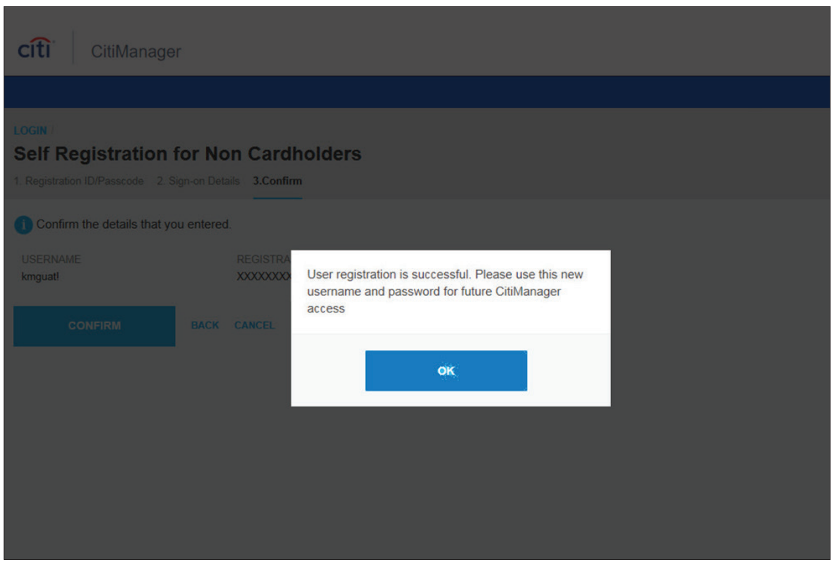
Confirm Screen

</td><td>

13. Review the details and click the **Confirm** button.

A confirmation message displays indicating registration was successful and a confirmation e-mail is sent to the address entered during the registration process.

</td></tr>
<tr><td>



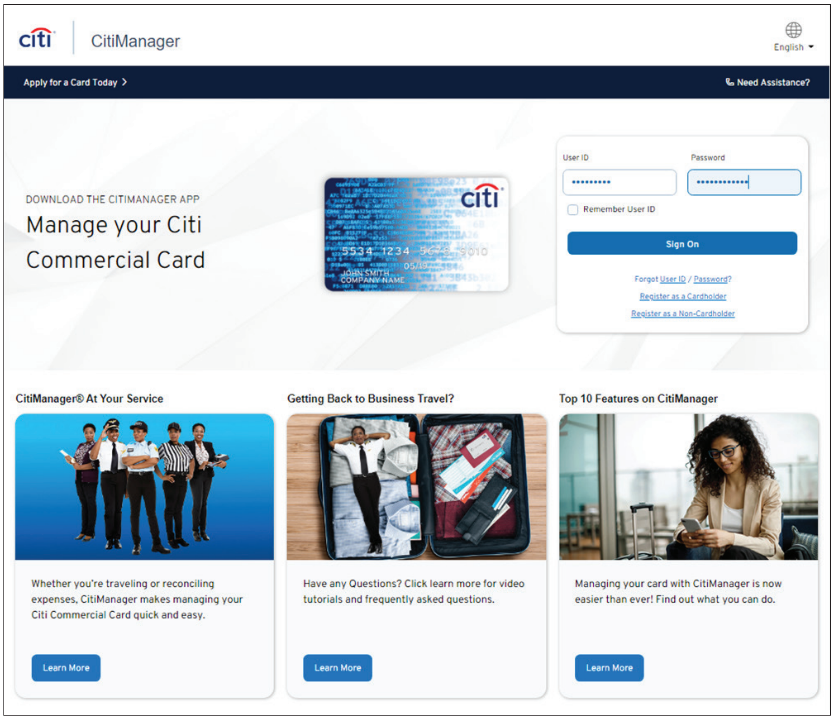
Confirmation Message

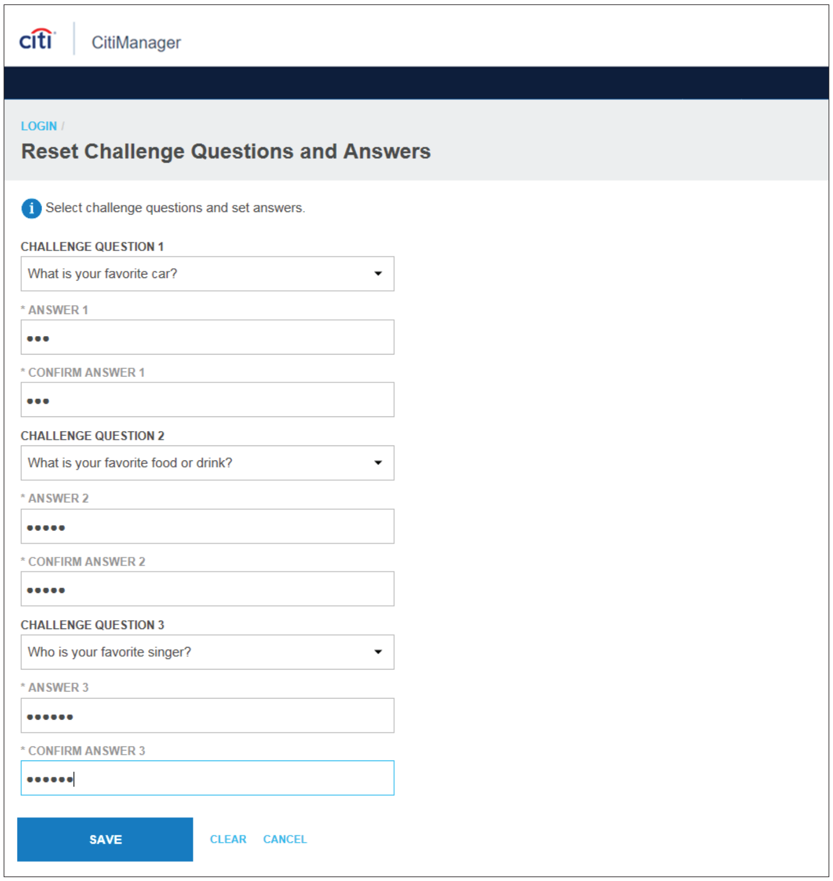
</td><td>

14. Click the **OK** button.

The CitiManager Site Login screen displays. When you log in for the first time, you will be prompted to select and answer three challenge questions.

</td></tr>
</table>

Screen	Step/Action
 **CitiManager Site Login Screen**	15. Type your user ID and password and click the **Sign On** button. *The Reset Challenge Questions and Answers screen displays.*

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


Reset Challenge Questions and Answers Screen
</td><td>

16. Select and answer three challenge questions.

    Note: As part of the confirmation of the challenge questions, you are required to answer each question twice.

17. Click the **Save** button.

    The CitiManager Site Home screen displays.

</td></tr>
</table>

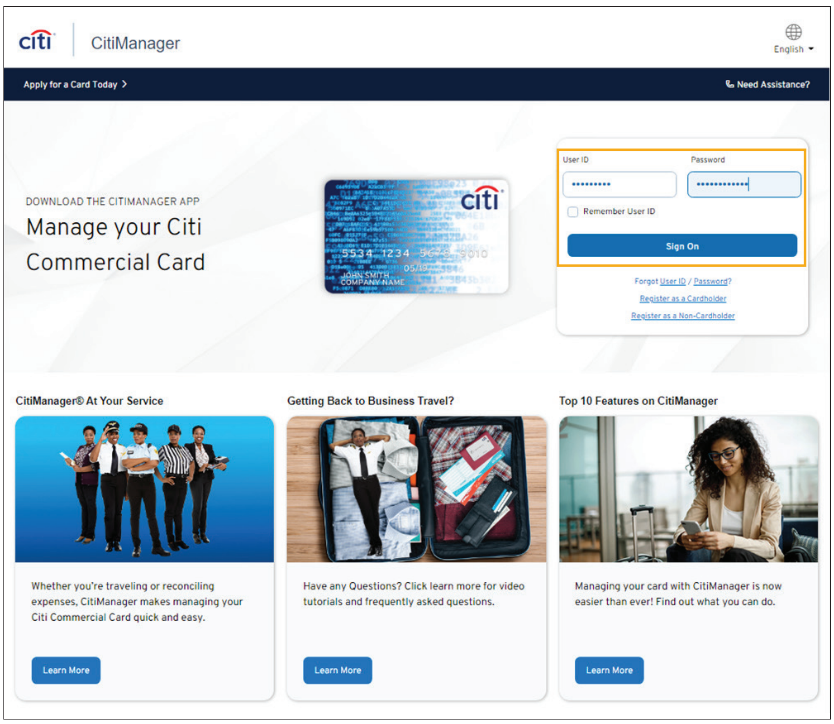
Log In to the CitiManager Site

Key Concepts

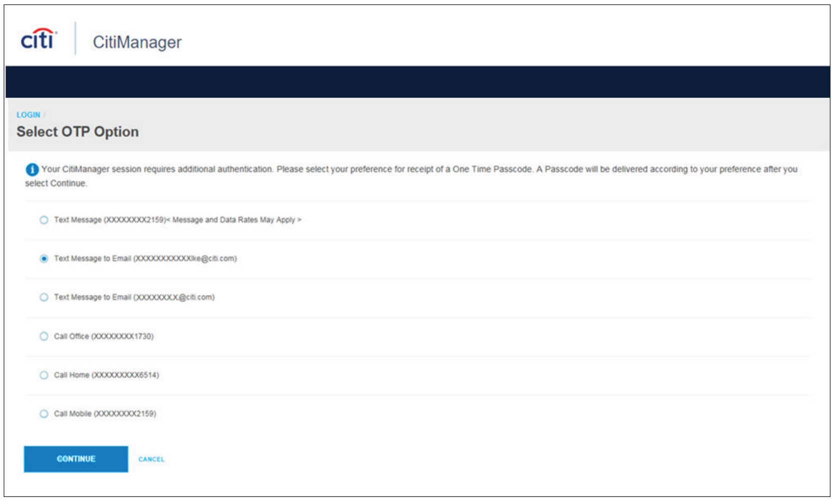
In order to access your account information in the CitiManager Site, you must log in to the application using a valid username and password and you will be prompted to enter a one-time passcode (OTP). You can only have one session of CitiManager open at a time.

If you cannot remember your username or password, refer to the **Retrieve Forgotten Username** or **Reset Forgotten Password** topics in this User Guide.

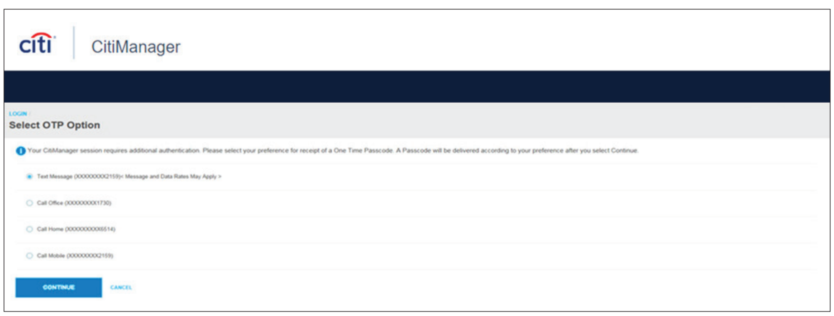
Step-By-Step Instructions

Screen	Step/Action
 **CitiManager Site Login Screen**	1. Navigate to **www.citimanager.com/login**. *The CitiManager Site Login screen displays.* 2. In the **User ID** field, type your user ID. 3. In the **Password** field, type your password. 4. Click the **Sign On** button. *The One-Time Passcode receipt options screen displays.*

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>



Select OTP Option Screen – E-mail



Select OTP Options Screen – Text

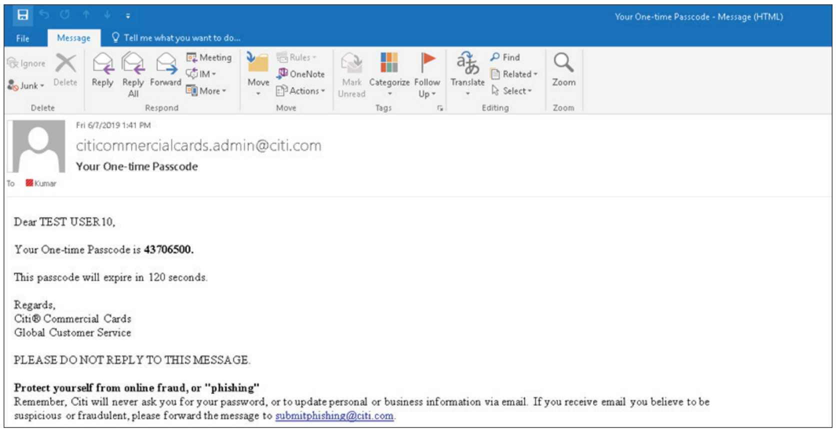
</td><td>

5. Select the option for how you would like to receive your OTP.

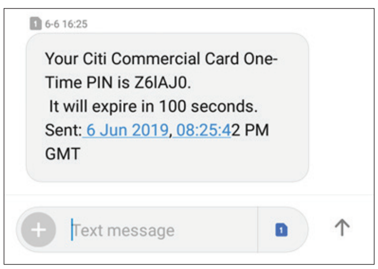
   Note: Possible options are Email, Text Message, Call Office, Call Home and Call Mobile. Only the options currently set up in your CitiManager Site profile will be available as possible options.

6. Click the **Continue** button.

</td></tr>
</table>

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


OTP – E-mail



OTP – Text
</td><td>7. Retrieve your OTP from the receipt option selected.</td></tr>
<tr><td>


Enter OTP Screen
</td><td>8. In the One-time Passcode field, enter the eight-digit passcode received from the receipt option you selected and click the Continue button.

The CitiManager Site Home screen displays.</td></tr>
</table>

View Card Account Details

Key Concepts

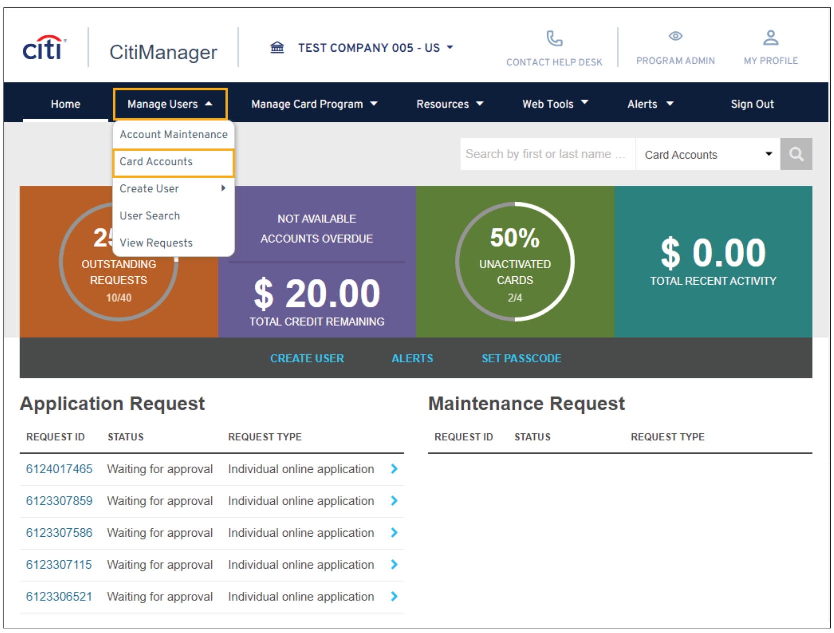
You can search for Cardholder accounts that reside in your assigned hierarchies. Once the search is complete, you may view:

- Balance, credit limit and payment information
- Links to recent transactions and previous statements
- Aging of balance information
- Card contact information

APCs can only access accounts within their span of control.

The **Card Details** screen is also a launching point if you want to view recent transactions, billed statements/transactions or perform other actions such as viewing disputes if they were submitted through the CitiManager Site, viewing the account hierarchy or setting alerts for the Cardholder.

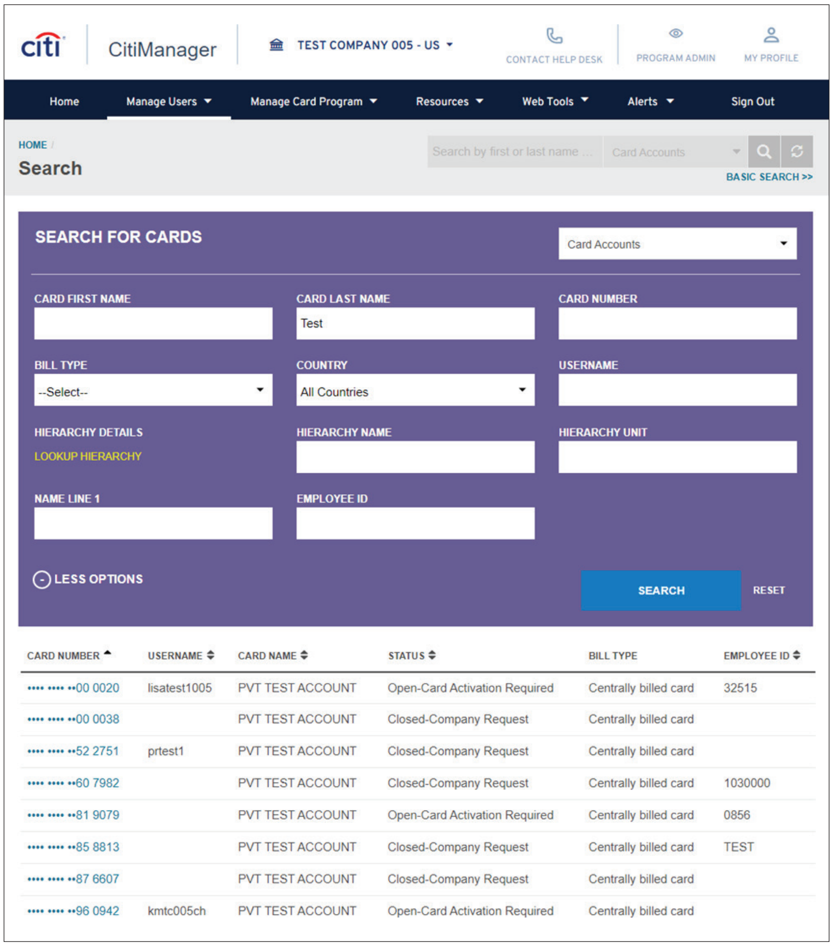
Step-By-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>

CitiManager Site Home Screen</td>
<td>1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Card Accounts link.

The Search for Cards screen displays.</td></tr>
</table>

Screen	Step/Action



Search for Cards Screen

2. To perform a search, type the desired search criteria in the **Card First Name**, **Card Last Name** or **Card Number** fields and click the **Search** button.

   Note: To perform an advanced search use the **Bill Type**, **Country**, **Username**, **Hierarchy Name**, **Hierarchy Unit**, **Name Line 1** or **Employee ID** fields. If you search by **Hierarchy Unit**, you must enter the full hierarchy number with no spaces or dashes.

   To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link. If necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.

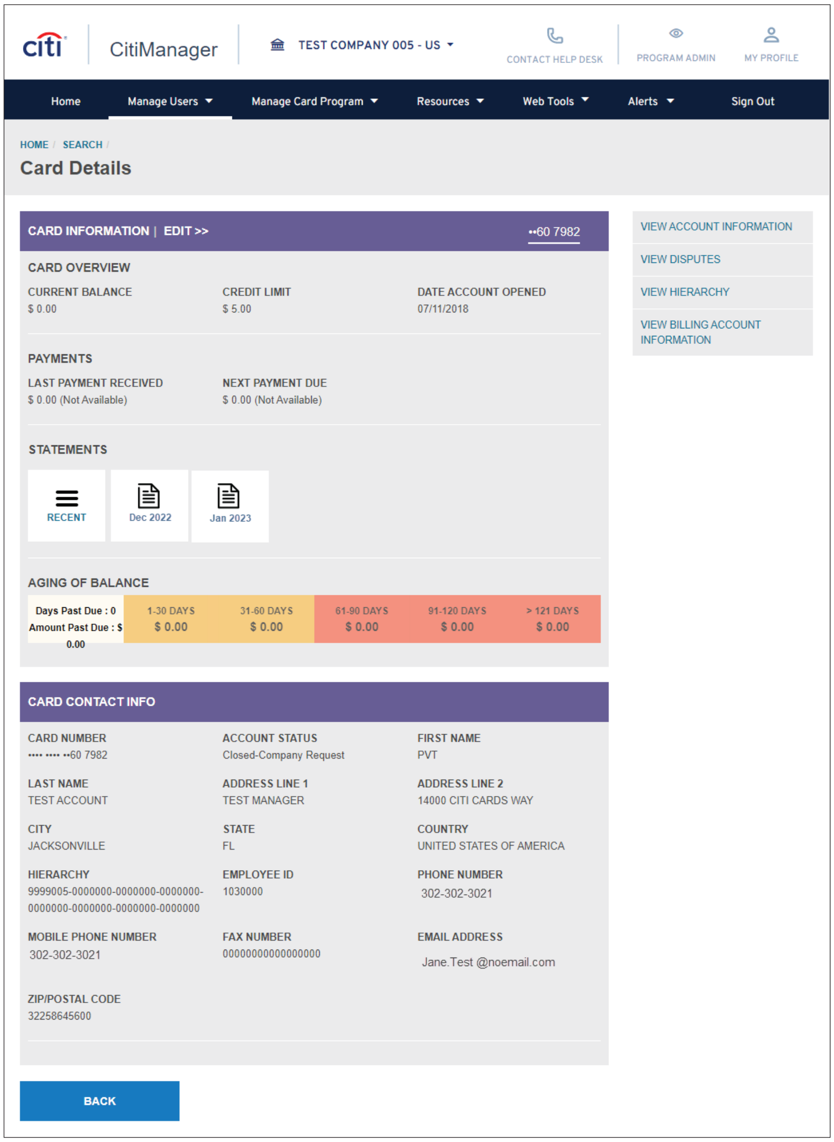
   The search results display at the bottom of the screen.

   Note: To sort the results by the **Card Number, Username**, **Card Name**, **Status**, **Bill Type** or **Employee ID** columns, click the column header name.

3. From the **Card Number** column, click the link for the card account you wish to view.

   The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements, aging of balance information and the card contact details.

   Note: To navigate back to the **Search Results** screen, click the **Back** button that displays at the bottom of the screen or the link in the breadcrumbs displayed at the top of the screen.

Screen	Step/Action
 Card Details Screen	4. From the **Card Details** screen you can also navigate to the following: • Depending on your agency/organization's setup, you can **View Account Information** (account communications), **View Disputes**, **View Hierarchy**, **Update Alerts**, **Emulate Card Holder**, and **View Account Documents** for the account by clicking the desired link that displays on the right-side of the screen. For **Emulate Card Holder** and **Update Alerts**, these options only display if the Cardholder is registered in CitiManager. • To view recent transactions or previously billed transactions for the selected card account, click the **Recent** icon or the desired statement date icon. • To perform account maintenance on the selected Cardholder, click the **Edit** link next to the **Card Information** header at the top of the screen.

View Statements and Recent Transactions

Key Concepts

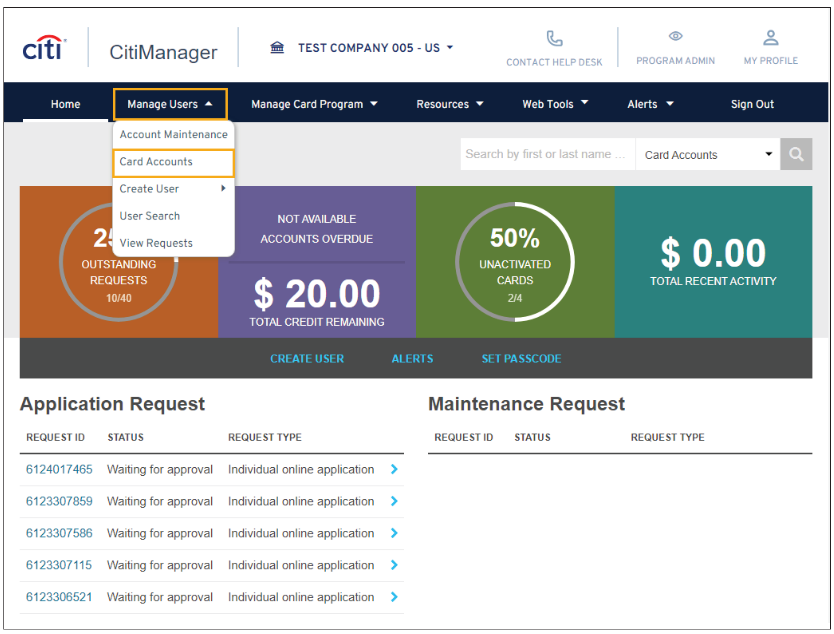
You can view a Cardholder's current statement or a statement from previous months. You can also view recent transactions for a Cardholder that have posted to the account but have not yet been billed to a statement. Transaction data will be retained for the previous 72 statements. Statements that are three years or older are archived and a request needs to be submitted to download them.

The **Statements** screen displays a snapshot of balances, payments posted and due dates. A list of transactions also displays and at the bottom the screen and you can expand each to view additional detail that may have been sent to Citi from a merchant. Transaction detail will include the original currency amount, currency exchange rate and the conversion amount that was posted and may include items such as airline name, ticket and flight number.

Additionally, you can initiate a dispute if the transaction meets the requirements.

You can download and print transactions for individually or centrally billed accounts. If you wish to print 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.

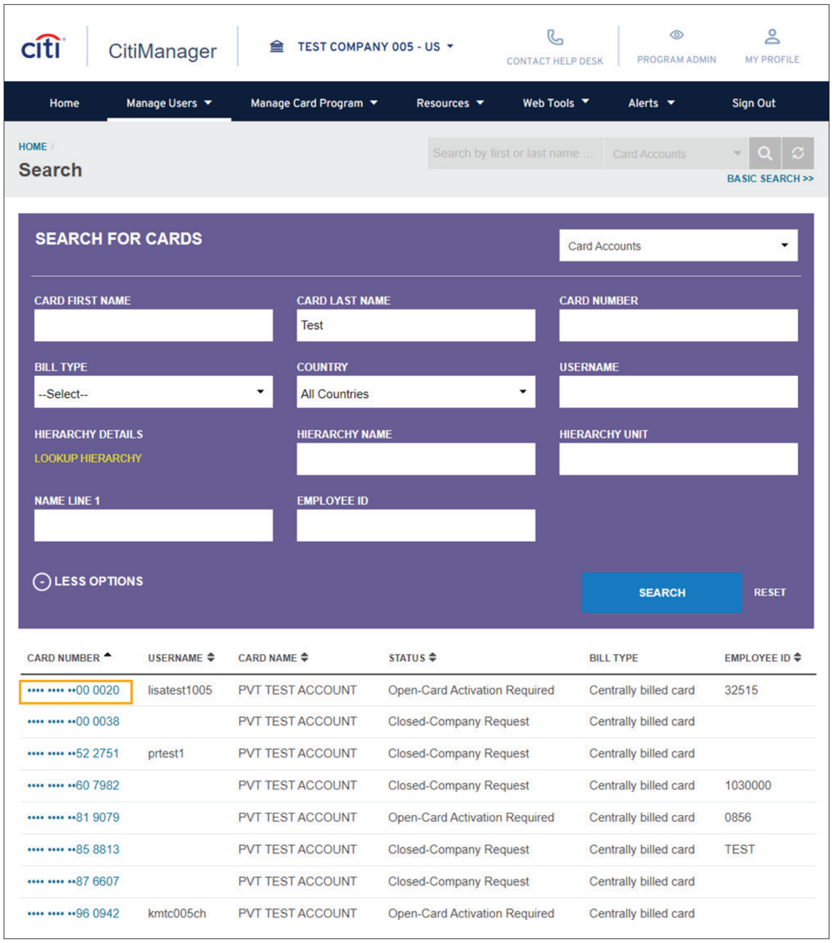
Step-By-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


CitiManager Site Home Screen
</td><td>
1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Card Accounts link.

The Search for Cards screen displays.
</td></tr>
</table>

Screen	Step/Action



Search Screen

2. To perform a search, type the desired search criteria in the **Card First Name**, **Card Last Name** or **Card Number** fields and click the **Search** button.

   Note: To perform an advanced search use the **Bill Type**, **Country**, **Username**, **Hierarchy Name**, **Hierarchy Unit** or **Name Line 1** fields. If you search by **Hierarchy Unit**, you must enter the full hierarchy number with no spaces or dashes.

   To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link. If necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.

   The search results display at the bottom of the screen.

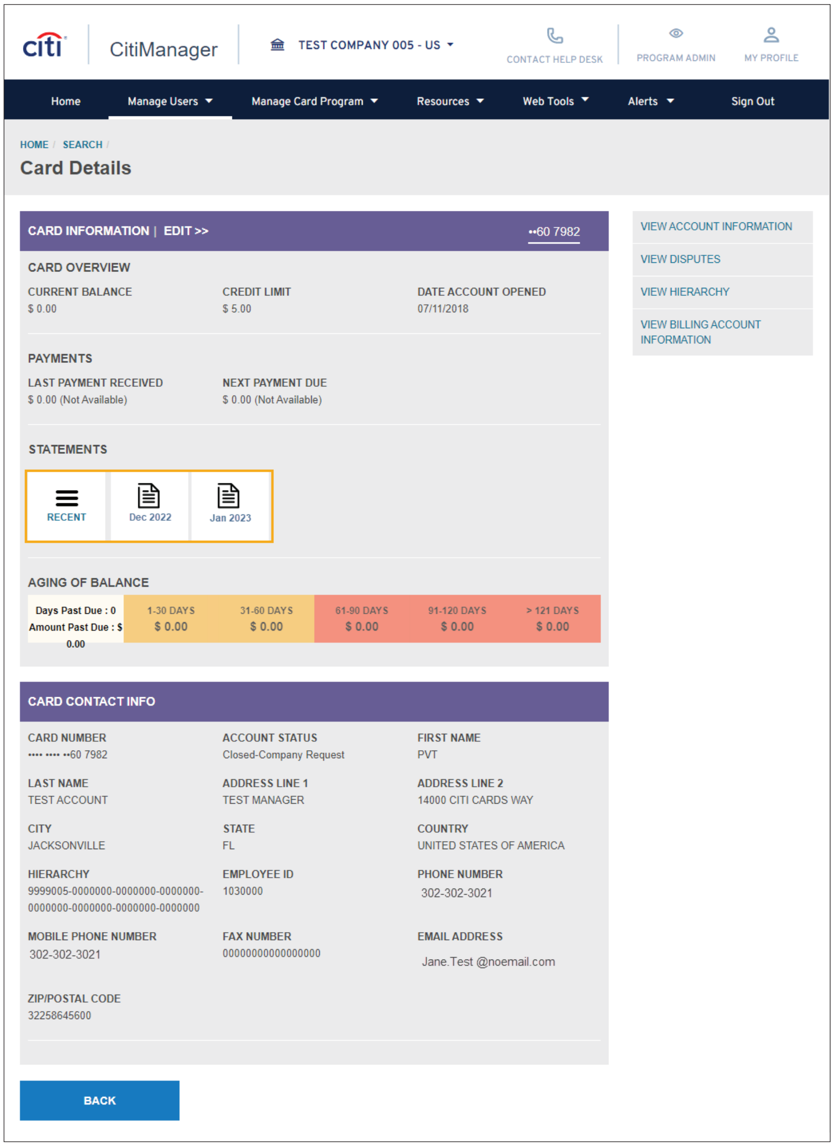
   Note: To sort the results by the **Card Number**, **Username**, **Card Name**, **Status**, **Bill Type** or **Employee ID** columns, click the column header name.

3. From the **Card Number** column, click the link for the card account you wish to view.

   The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements, aging of balance information and the card contact details.

   Note: To navigate back to the **Search Results** screen, click the **Back** button that displays at the bottom of the screen or the link in the breadcrumbs displayed at the top of the screen.

Screen	Step/Action

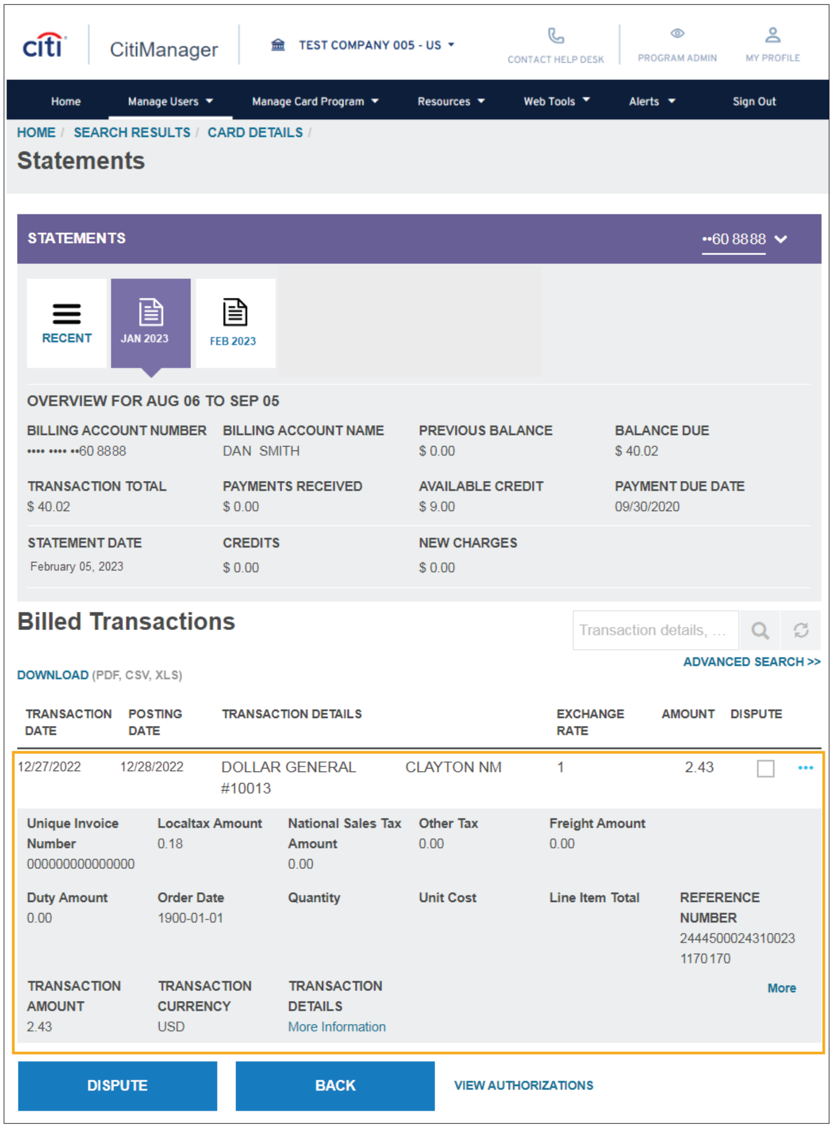


Card Details Screen

4. From the **Statements** section, click the icon for the statement date you wish to view or click the **Recent** icon to view transactions that have posted to an account but have not yet been billed to a statement.

   Note: A request needs to be submitted to download statements that are three years or older. When you click on the statement date icon, a download request window displays. Click **Yes** to confirm the request. After 24 hours, return to the **Card Accounts** screen and click the statement date icon for the statement you downloaded to access the **View Archived Statements** screen. Click the **Download** link to download the statement to your computer.

   The Statements screen displays. A snapshot of balances and payments display at the top of the screen. Recent or billed transactions display at the bottom of the screen.

Screen	Step/Action
 Statements Screen	5. 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** or **Recent Transactions** section and click the **Search** icon. Click the **Advanced Search** link to access additional search criteria. *The transactions are filtered by the search criteria entered.* 6. To download the Citi generated statement, click the **Download** link. Then, select the **PDF** version and click the **Download** button. 7. 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 detail displays.* **Note:** You can initiate a dispute by clicking the **Dispute** button that displays at the bottom of the screen.

Perform Account Maintenance

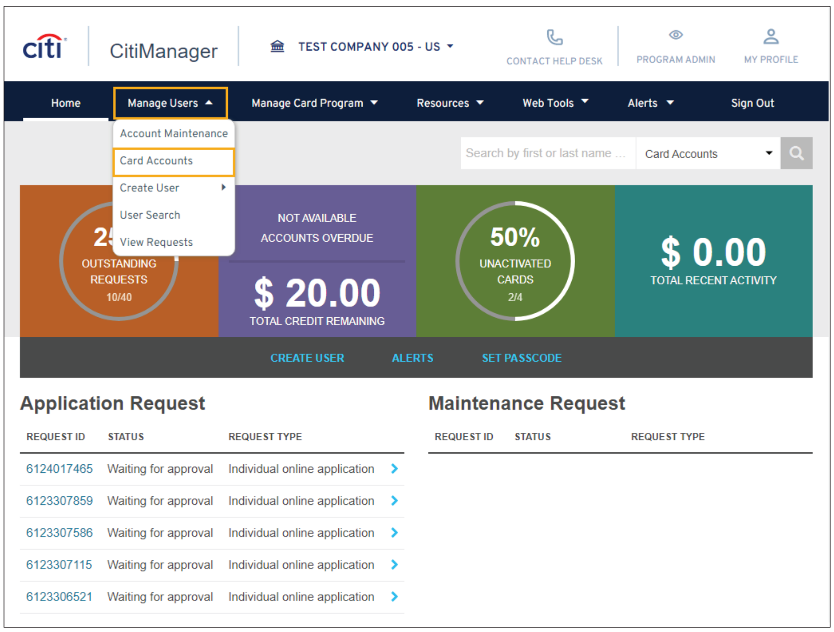
Key Concepts

To perform account maintenance, the Cardholder Maintenance form must be completed and submitted to Citi. Account Maintenance allows the APC to update Cardholder account information such as card address, Employee ID, account status, and temporary spending controls. For individuality billed accounts, a Non-cardholder is not permitted to perform account maintenance on their own account.

You can maintain information such as the address, temporary credit limit, account status, Merchant Category Code Groups (MCCGs), mission critical status, and request replacement cards.

Step-by-Step Instructions

Screen



CitiManager Site Home Screen

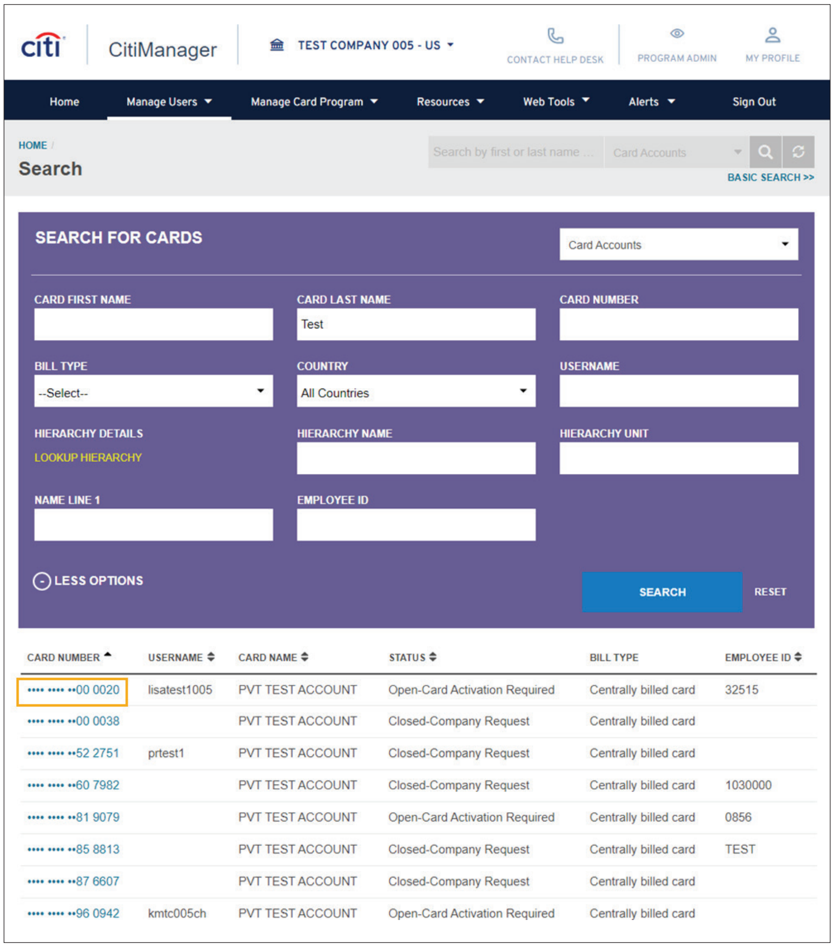
Step/Action

1. From the navigation bar, position your mouse over the **Manage Users** drop-down menu and click the **Card Accounts** link.

   Note: You can also click the **Account Maintenance** link from the **Manage Users** icon.

   The Search screen displays.

Screen



Search Screen

Step/Action

2. To narrow your search, type the desired search criteria in the **Card First Name**, **Card Last Name** or **Card Number** fields and click the **Search** button.

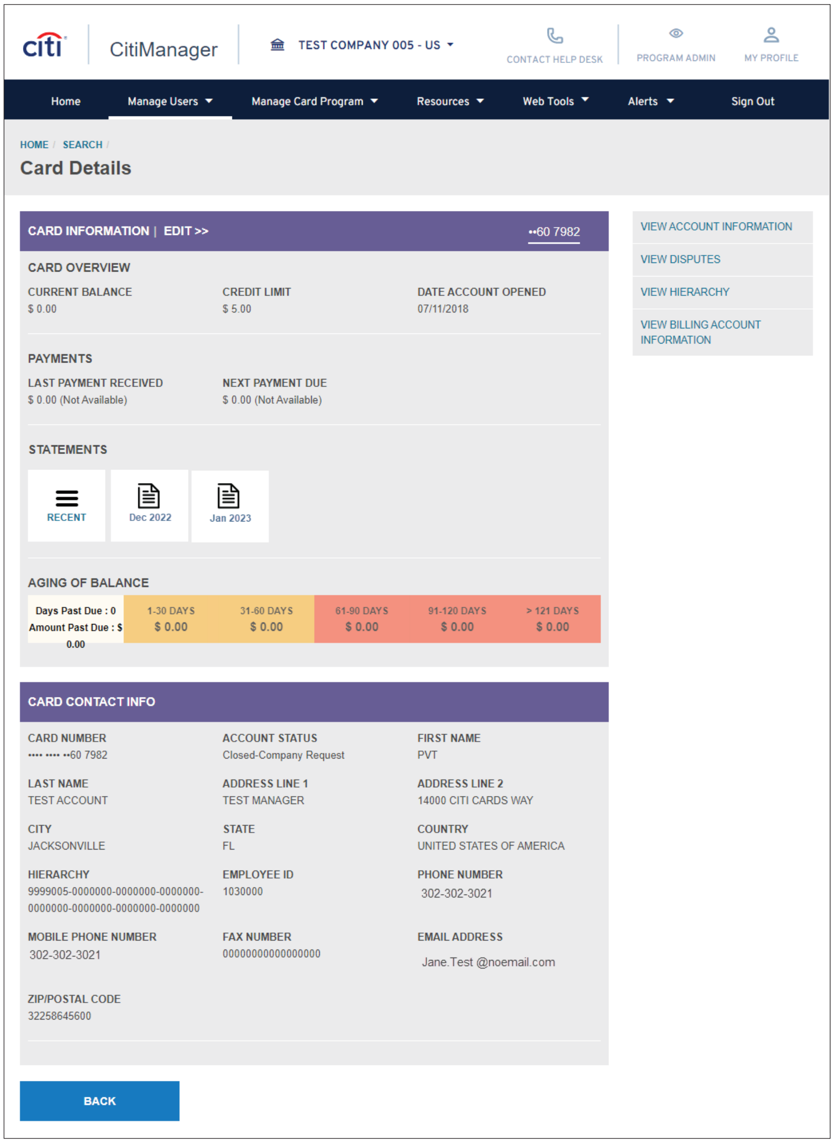
   Note: To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link, if necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.

   The search results display at the bottom of the screen.

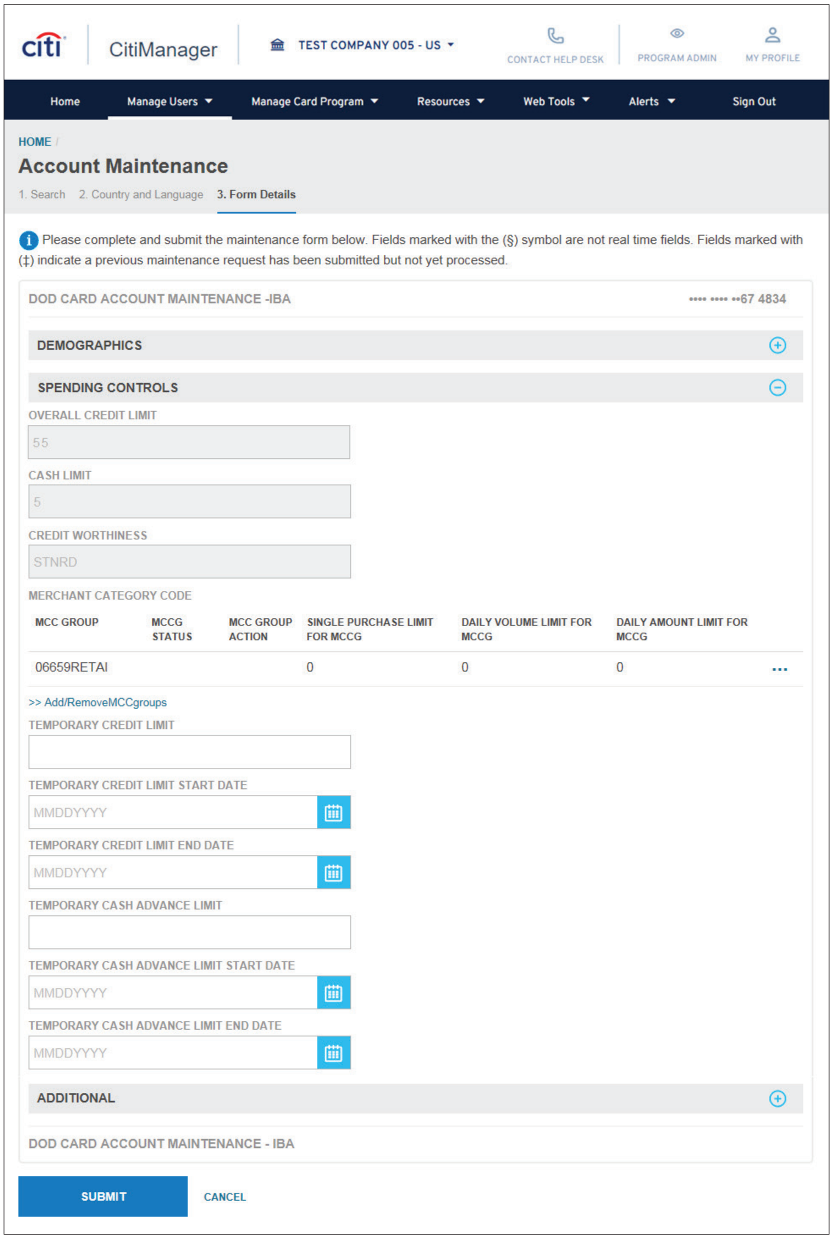
   Note: To sort the results by the **Card Number**, **Username**, **Card Name**, **Status**, **Bill Type** or **Employee ID** columns, click the column header name.

3. From the **Card Number** column, click the link for the account you wish to maintain.

   The Card Details screen displays the card overview including the current balance, credit limit, payment history, links to recent and previous statements, aging of balance information and the card contact information.

Screen	Step/Action
 Card Details Screen	4. From the **Card Information** section header, click the **Edit** link. *The Account Maintenance — Form Details screen displays.*

Screen	Step/Action



Account Maintenance — Form Details Screen

5. Complete the necessary updates to all sections of the form.

   Note: You can maintain information such as the address, temporary credit limit, account status, mission critical dates, and MCCGs. International phone numbers cannot be added on the Account Maintenance screen. You can enter an international phone number on the **Update User** screen (Manage Users > User Search > Update User > Contact Details) or on the **Alerts** screen (Manage Users > Card Accounts > Update Alerts > Mobile Phone Number — Edit).

   Fields marked with the (§) symbol are not real-time fields. Fields marked with the (‡) indicate a previous maintenance request has been submitted but not yet processed. All un-marked fields are processed in real-time. To expand a section header, click the (**+**) **plus sign** icon.

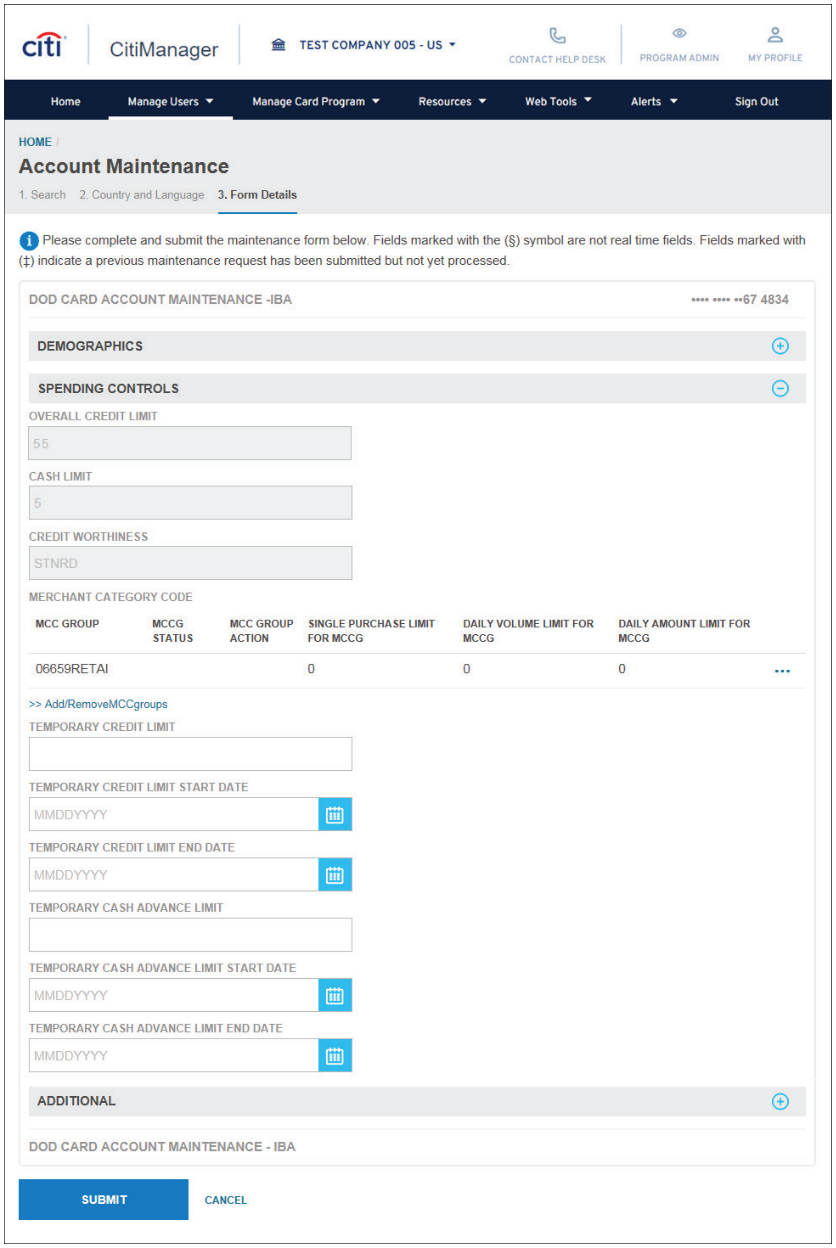
   The **Temporary Cash Advance Limit Start Date** and **Temporary Credit Limit Start** fields are processed in real-time and can be updated 24 hours a day excluding weekends, Thanksgiving, Christmas and New Year's.

   To add/remove an MCCG, click the **Add/ Remove MCC Groups** link in the **Spending Controls** section. Select or deselect the checkbox(s) for the desired MCCGs. If you are adding and deleting MCCGs to an account, you must perform the additions prior to submitting the deletions. When you are finished, click the **Update** button and then the **Back to Form** button.

   To close an account, from the **Additional** section, from the **Account Status** drop-down list, select the desired status. The **Closed Temporary Block** status is equivalent to **Deactivate**.

(continued)

Screen	Step/Action



Account Maintenance — Form Details Screen

To put the account in mission critical status, enter the dates for mission critical status in the **Mission Critical Start Date** and **Mission Critical End Date** fields. The mission critical start date has to be greater than today's date and only occur on business days. Mission Critical can be set for up to 120 calendar days.

If you need to add comments to explain the reasons for account changes, enter them in the **Account Comments** field on the maintenance form. You can enter a maximum of 500 characters in the field. You can view previous comments by clicking the **View History** button. This information is also fed to CitiManager — Reporting and is included in reporting.

To order a replacement card, you may select the checkbox in the **Order a Replacement Card** section. Select the address to which you want the replacement card to be delivered.

You may also initiate a card replacement in the CitiManager Site when a card has been lost, stolen, never received or damaged. Refer to the Replace Lost/Stolen/Never Received/Damaged Card topic in the CitiManager Non-cardholder End-to-End User Guide for additional information.

6. When you are finished updating the form, click the **Submit** button.

   A confirmation message displays based on the maintenance performed.

7. Click the **OK** button.

   A confirmation screen displays at the top of the screen.

Perform PCS Account Maintenance

Key Concepts

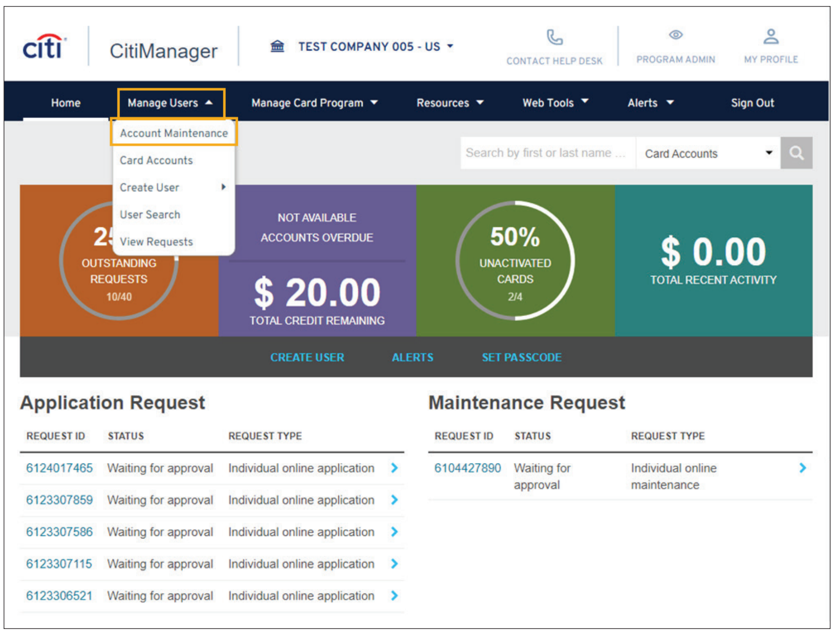
A Permanent Change of Station (PCS) status is used to keep the account balance from aging while a Cardholder is moving to a new permanent duty location and extends the payment window for Cardholder.

The component's policies determine whether Individually Billed Accounts (IBAs) will be used for PCS.

To place a Cardholder in PCS status, an APC must place the account into mission critical status and ensure the **PCS Status** indicator is set to **Y**.

Pending travel vouchers should be settled prior to an individual's departure for PCS.

Step-By-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


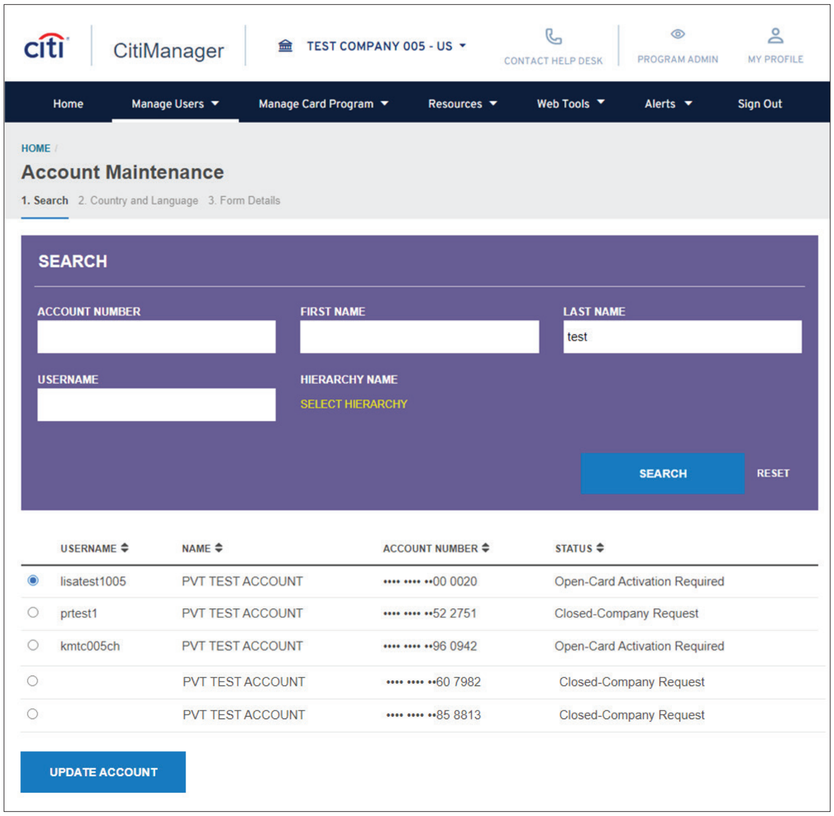
CitiManager Site Home Screen
</td><td>

1. From the CitiManager Site side navigation bar, position your mouse over the **Manage Users** drop-down menu and click the **Account Maintenance** link.

   The Account Maintenance — Search screen displays.
</td></tr>
</table>

Screen	Step/Action

Screen



Account Maintenance — Search Screen

Step/Action

2. To perform a search, type the desired search criteria in **Account Number**, **First Name**, **Last Name**, **Username**, **Employee ID**, or **SSN** fields and click the **Search** button.

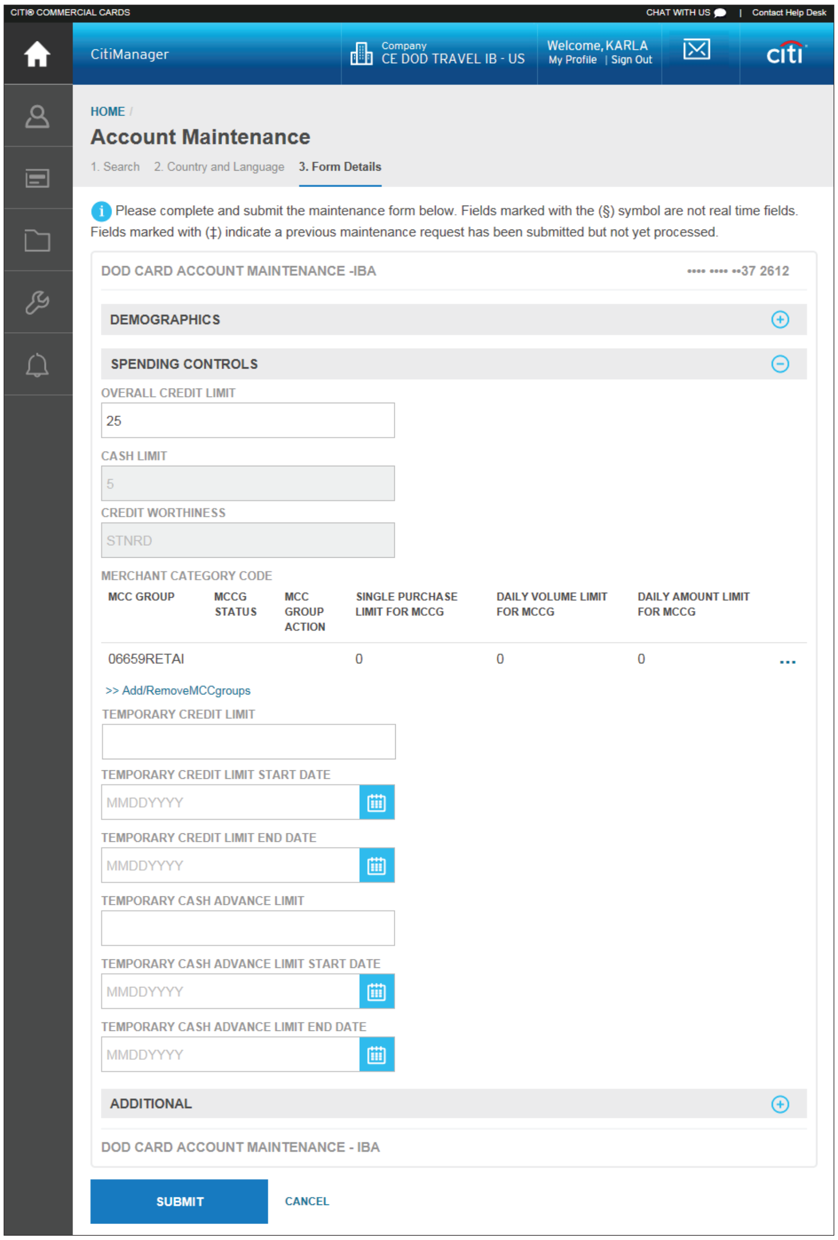
   Note: To search for an account at a specific hierarchy level, click the **Select Hierarchy** link. If necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.

   The search results display at the bottom of the screen.

3. Select the radio button for the account you wish to place in PCS status and click the **Update Account PCS** link that displays at the bottom of the screen.

   The Account Maintenance — Form Details screen displays.

Screen



Account Maintenance — Form Details Screen

Step/Action

4. Verify the **PCS Indicator** is set to **Y** and update if necessary.
5. From the **PCS** section, complete the **Mission Critical Start Date** and **Mission Critical End Date** fields of the form.

   Note: The mission critical start date has to be greater than today's date and only occur on business days.

   The elapsed time between start and end date cannot exceed more than 120 calendar days.
6. Depending on the PCS, you may need to complete additional fields/sections such as:
   - Start **Pad Days** and **End Pad Days**. PAD days are the number of days you want to give a traveler as an extension to check in to their next duty station
   - MCC Groups
   - **Temporary Credit Limit**, **Temporary Credit Limit**, **Start Date** and **Temporary Credit Limit End Date**
7. When you are finished, click the **Submit** button.

   A confirmation screen displays indicating the form has successfully processed.
8. Click the **OK** button.

   The CitiManager Home screen displays.

Manage Application Requests (View Requests)

Key Concepts

You can search for and view all online application requests submitted through the CitiManager Site. APCs can approve or reject the user requests as well as print the application.

From the **View Request** screen you can also:

- Override an approval
- Delete an application
- Download applications
- View Account Documentation

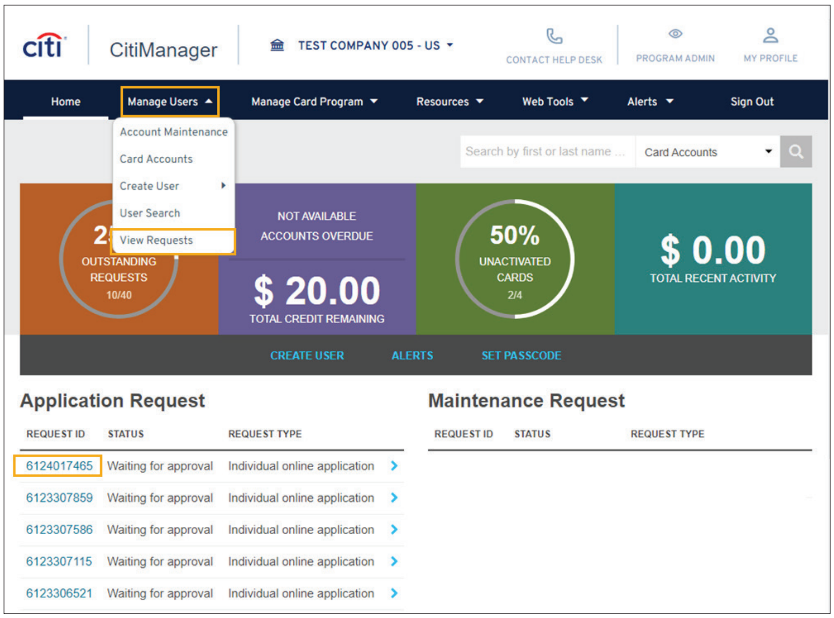
The option to approve and reject an application depends on the workflow and the status of the selected request.

The **Delete Application Request** link is only enabled when the **Select Request Type** is **Individual online application**, and the application status is not **Processed** or **Approved**.

Request Status Descriptions

Request Status	Description
Approved	Application was approved by the non-cardholder and will be processed by Citi.
Draft	Application was saved but not submitted.
More Information Requested	Application was sent back by the approver requesting additional information.
Pending Final Review by Citi	Request was placed in queue for CAS to process (e.g. when two applications were submitted with the same social security number). This status is not updated in the CitiManager Site. Contact your CAS for the current status of the request.
Processed	Application was processed and a card will be issued.
Waiting for Approval	Online Card Application request is awaiting non-cardholder approval.
Waiting for Approver1 Approval	Application is awaiting Approver1 approval.

Step-By-Step Instructions

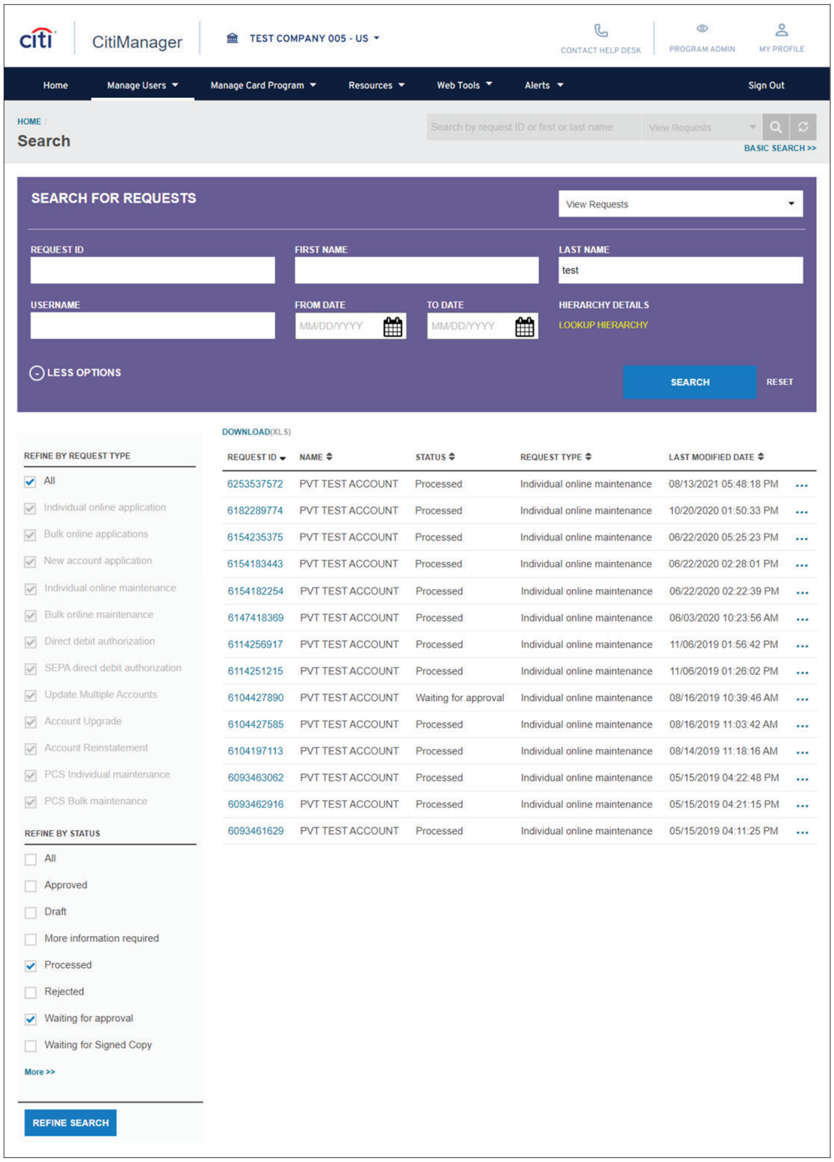
<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


CitiManager Site Home Screen
</td><td>
1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the View Requests link,

OR

From the Home screen Application Request section, click desired Request ID link and continue to Step 5.
</td></tr>
</table>

Screen



Search for Requests Screen

Step/Action

2. To perform a search, type the desired search criteria in the **Request ID**, **First Name** or **Last Name** fields and click the **Search** button.

   Note: To perform an advanced search use the **User Name**, **From Date** and **To Date** fields.

   To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link. If necessary, click the (**+**) **plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.

   The search results display at the bottom of the screen.

   Note: To sort the results by the **Request ID**, **Name**, **Status** or **Request Type**, or **Last Modified Date** columns, click the column header name.

3. To further filter the requests by type or status, select the desired checkbox(es) in the **Refine by Request Type** or Refine **by Status** sections displayed on the left-side of the screen.

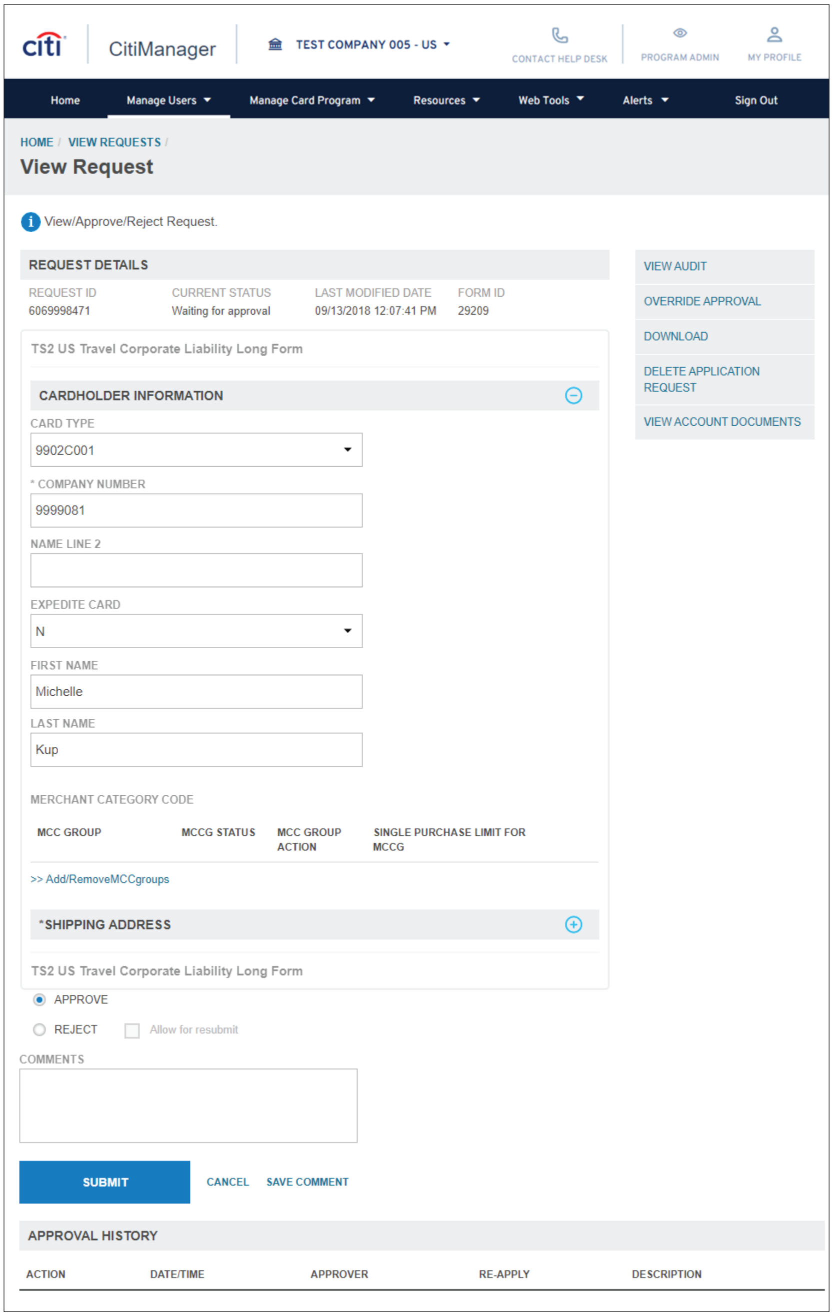
   Note: De-select the **All** checkboxes first to activate the sort option checkboxes.

   The requests displayed are filtered by the options selected.

4. To view a request, from the **Request ID** column, click the link for the request you wish to view.

   The View Request screen displays.

Screen



View Request Screen

Step/Action

5. Review the application details.

   Note: To expand a section header, click the (**+**) **plus sign** icon.

6. When you are finished reviewing the application, select either the **Approve** or **Reject** radio button.

   Note: If the application is rejected, you are required to type a reason for the rejection in the **Comments** field and then click the **Save** comment link. By default, the **Allow for Resubmit** checkbox is selected. De-select the checkbox if resubmission is not allowed.

7. When you are finished, click the **Submit** button.

   A confirmation message displays.

Search for User and View Details

Key Concepts

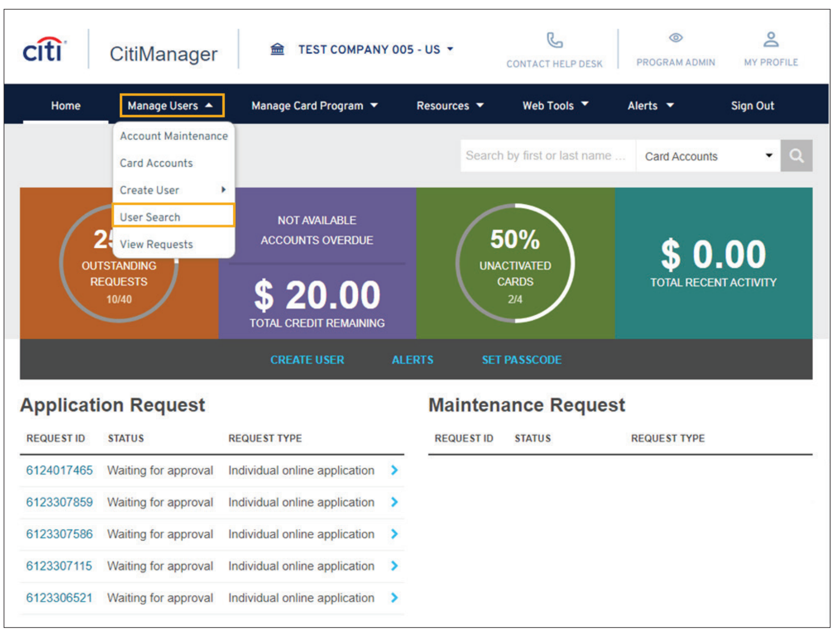
You may search for users (Cardholder and Non-Cardholder) and view their account details such as:

- Card details
- Contact details
- User roles
- User entitlements
- Hierarchy details

From the **User Details** screen you can also use the links that display on the right-hand side to:

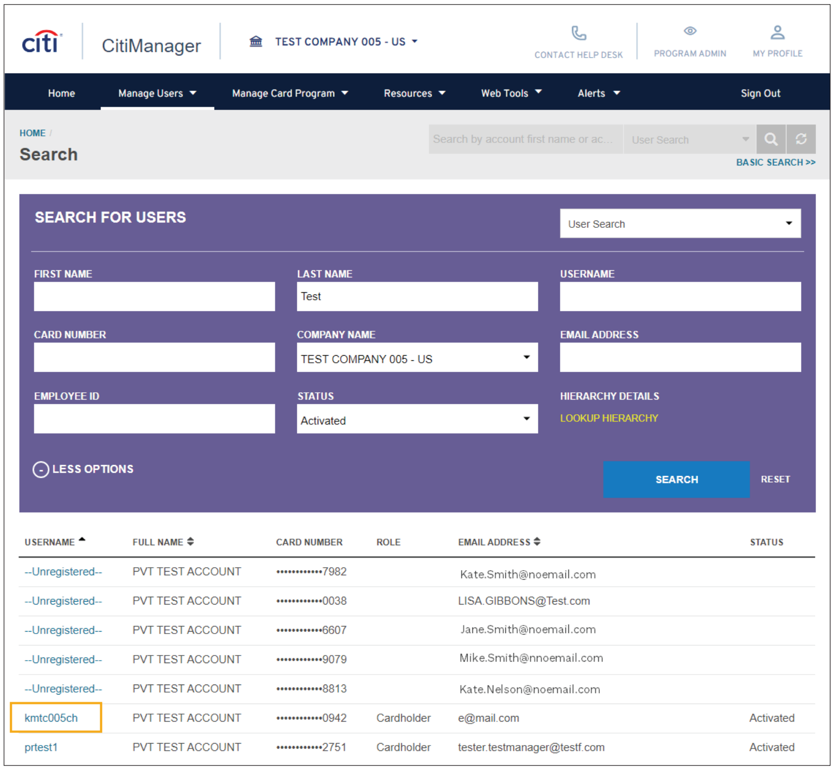
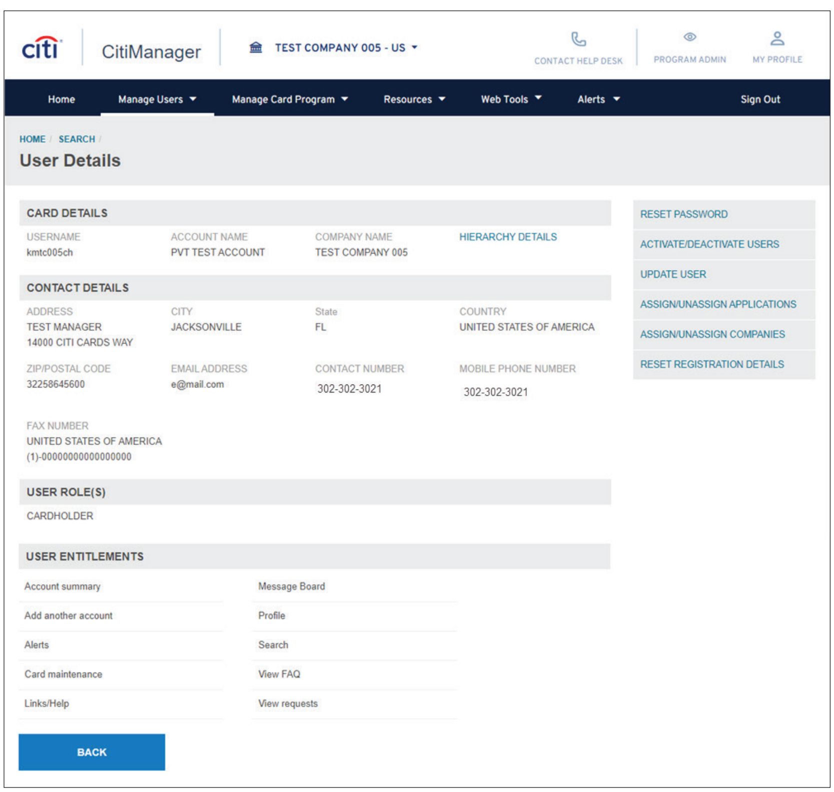
- Reset a user's password
- Deactivate a user
- Update a user
- Assign/Unassign applications

Step-by-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


CitiManager Site Home Screen
</td><td>
1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the User Search link.

The Search screen displays.
</td></tr>
</table>

Screen	Step/Action
 Search Screen	2. To perform a search, type the desired search criteria in the **First Name**, **Last Name** or **Username** fields and click the **Search** button. **Note:** To perform an advanced search use the **Card Number**, **Company Name**, **Email Address**, **Employee ID** and **Status** fields. To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link. If necessary, click the (**+**) **plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button. *The search results display at the bottom of the screen.* **Note:** To sort the results by the **Username**, **Full Name** or **Email Address** columns, click the column header name. 3. From the **Username** column, click the link for the card account you wish to view. *The User Details screen displays.*
 User Details Screen	4. As necessary, click the link for the desired function that displays on the right-side of the screen.

Retrieve Forgotten Username

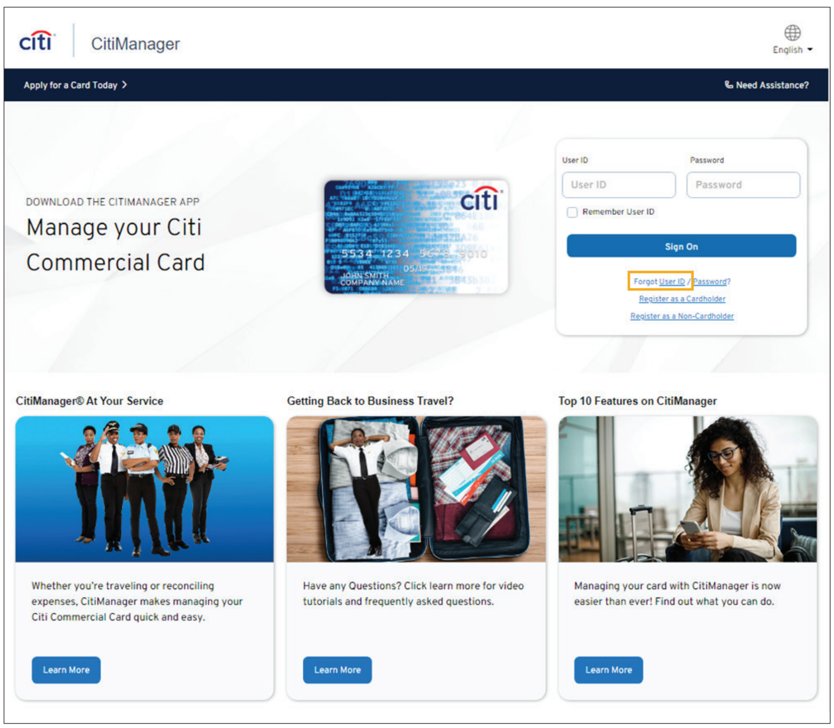
Key Concepts

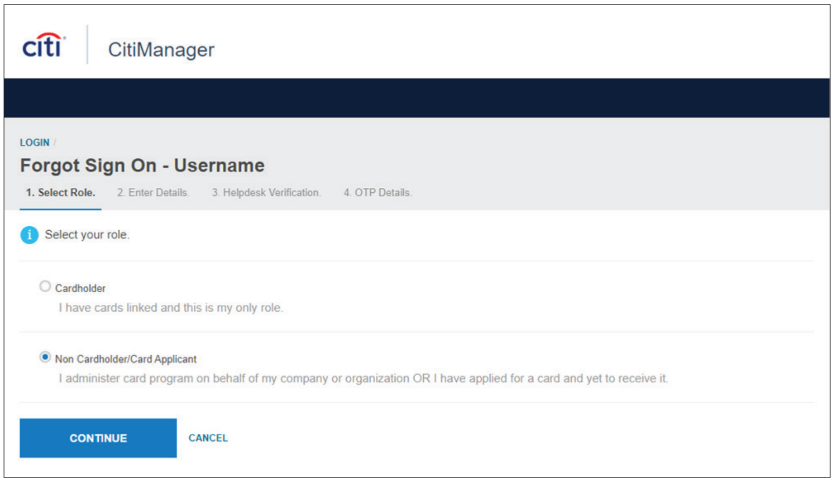
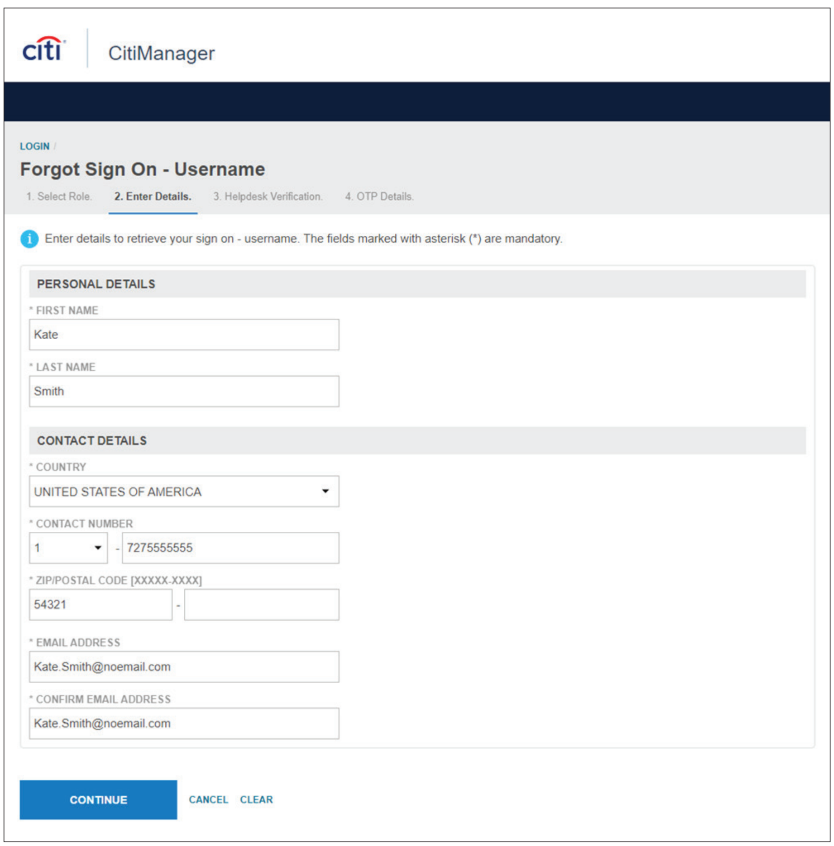
If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

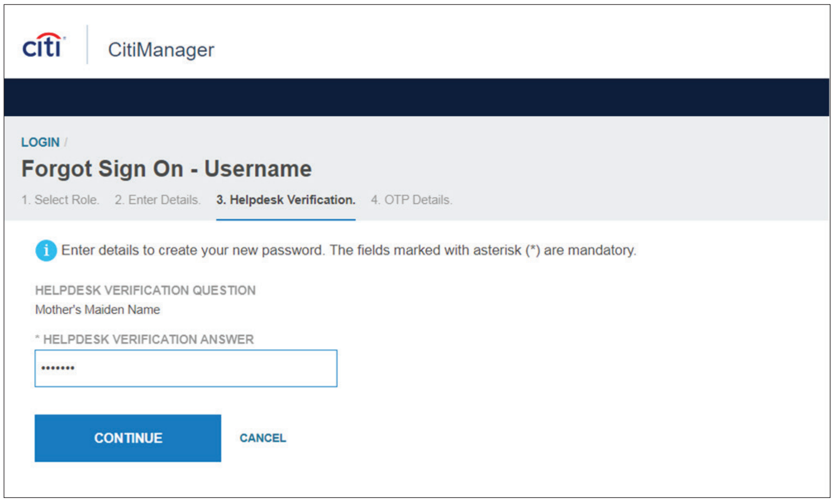
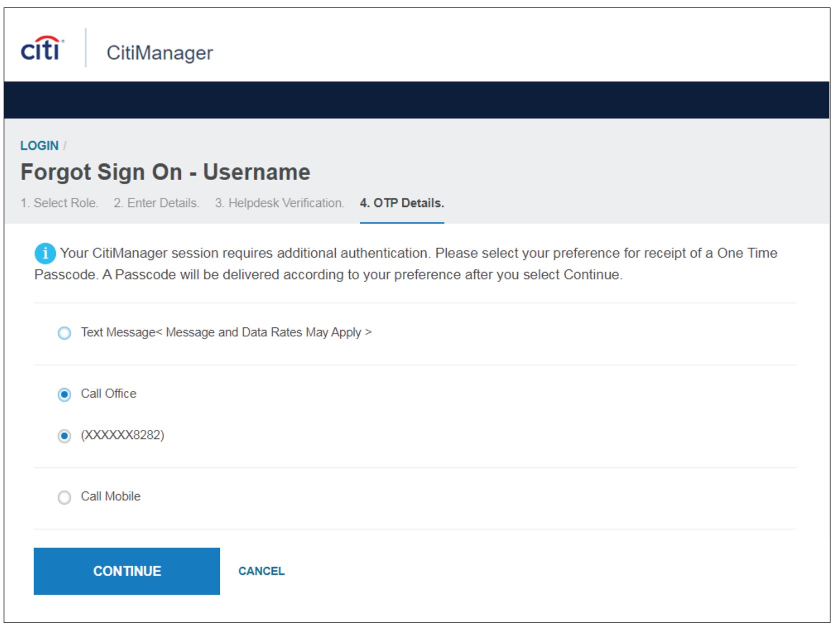
To retrieve your username, the following information is required:

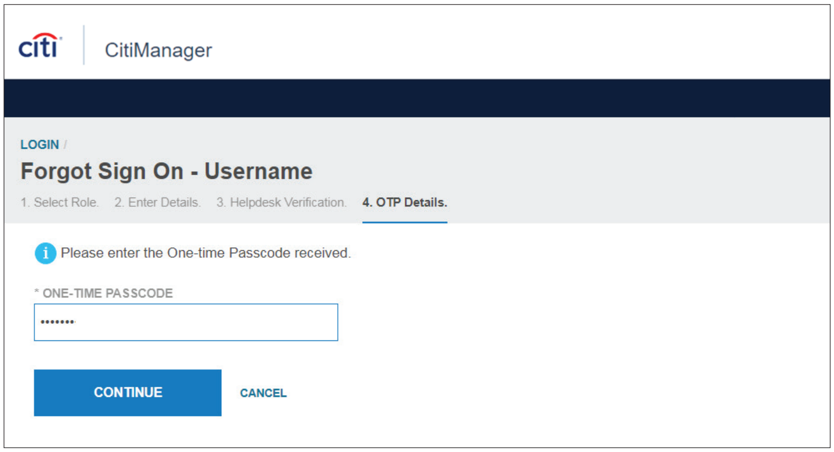
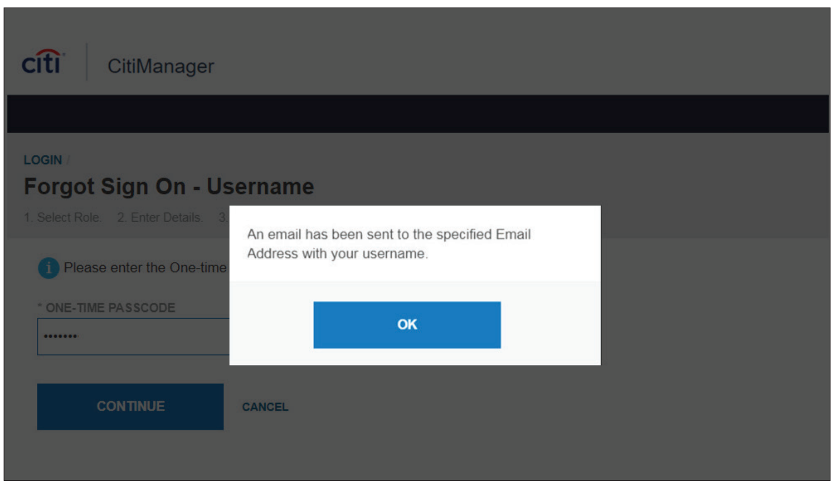
- Your first and last name
- Your country
- Your contact phone number
- The zip code/postal code associated with your user profile
- The e-mail address associated with your user profile

Step-By-Step Instructions

Screen	Step/Action
 **CitiManager Site Login Screen**	1. Navigate to **www.citimanager.com/login**. *The CitiManager Site Login screen displays.* 2. Click **Forgot User ID** link. *The Forgot Sign On — Username — Select Role screen displays.*

Screen	Step/Action
 **Forgot Sign On — Username — Select Role Screen**	3. Select the **Non Cardholder/Card Applicant** role radio button and click the **Continue** button. *The Forgot Sign On — Username — Enter Details screen displays.*
 **Forgot Sign On — Username — Enter Details Screen**	4. In the **First Name** field, type your first name. 5. In the **Last Name** field, type your last name. 6. From the **Country** drop-down list, select your country. 7. In the **Contact number** field, type your contact phone number. Only numeric values are allowed. 8. In the **Zip/Postal** code field, type the zip code associated with your user profile. 9. In the **Email Address** field, type the e-mail address associated with your user profile. 10. In the **Confirm Email Address** field, re-type the e-mail address that is associated with your user profile. 11. Click the **Continue** button. *The Forgot Sign On — Username — Helpdesk Verification screen displays.*

Screen	Step/Action
 **Forgot Sign On — Username — Helpdesk Verification Screen**	12. In the helpdesk verification answer field, type the answer to the helpdesk verification question and click the **Continue** button. *The Forgot Sign On — Username — OTP Details screen displays.* **Note:** You have three attempts to answer the helpdesk verification question correctly.
 **Forgot Sign On — Username — OTP Details**	13. From the **OTP Details** screen, select the appropriate contact option and click the **Continue** button. *A passcode is sent via text message or phone call depending on the option you have selected.*

Screen	Step/Action
 **Forgot Sign On — Username — Input OTP**	14. From the **One-Time Passcode** field, type the passcode you were provided and click the **Continue** button. *A confirmation message displays.*
 **Confirmation Message**	15. Click the **OK** button. *The CitiManager Site Login screen displays and the CitiManager Site sends an e-mail with your username.*

Reset Forgotten Password

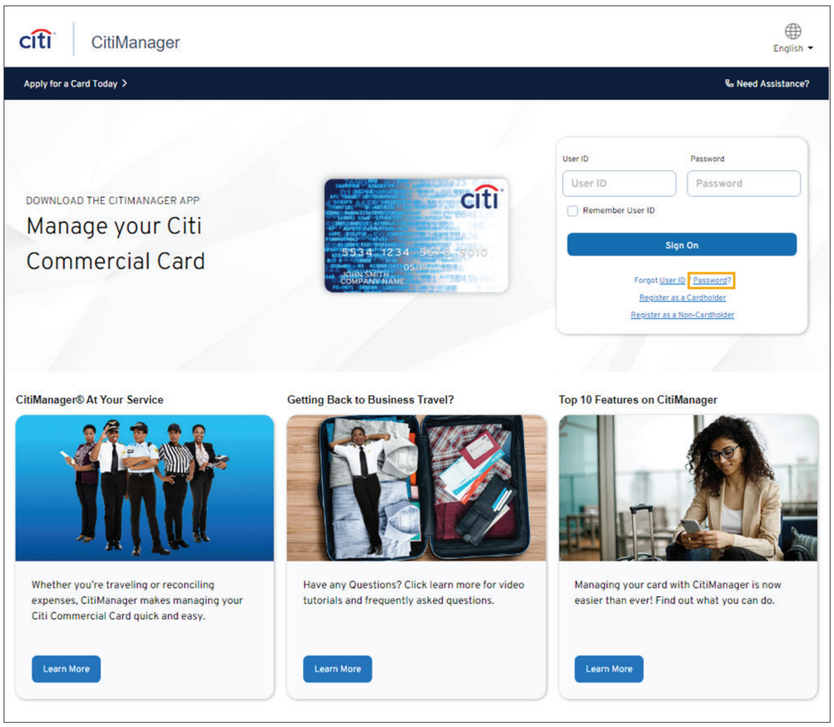
Key Concepts

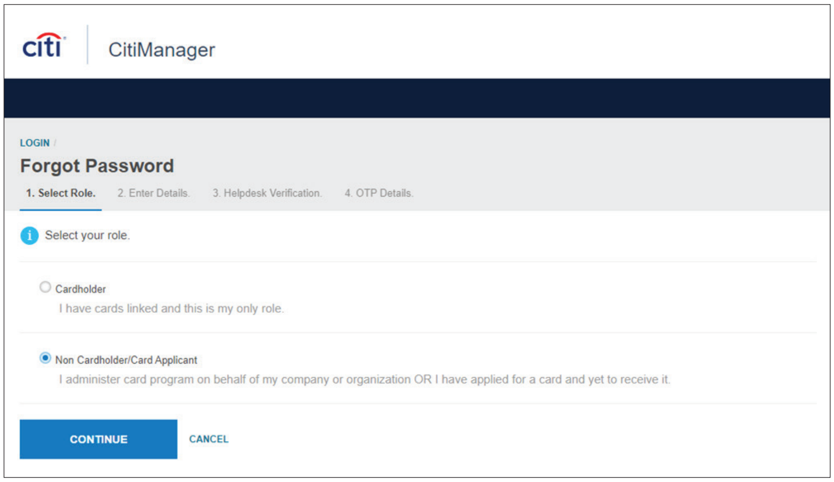
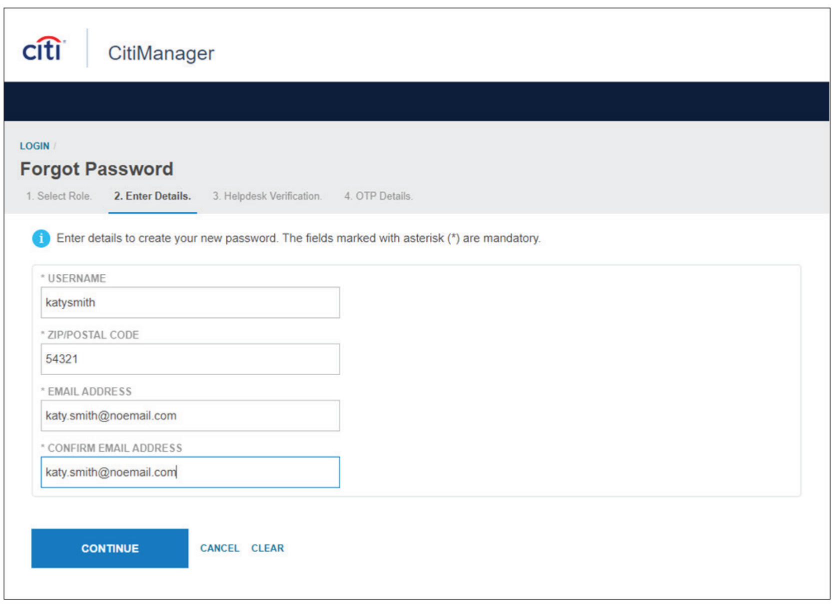
If you forget your password, you will need to reset it in order to sign in to the CitiManager Site.

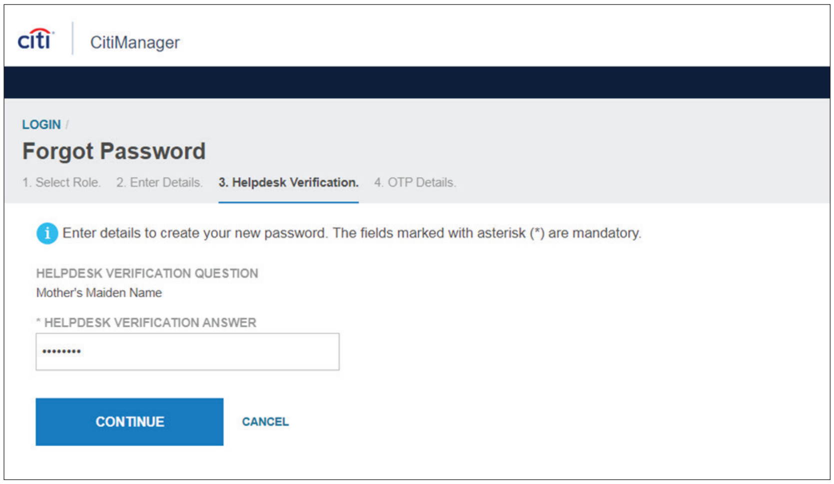
To reset your password, the following information is required:

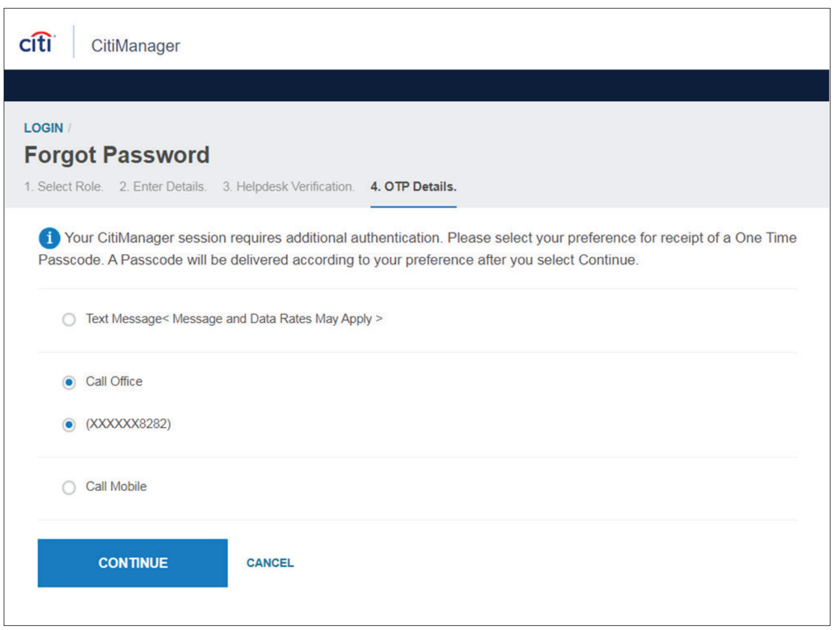
- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

Step-By-Step Instructions

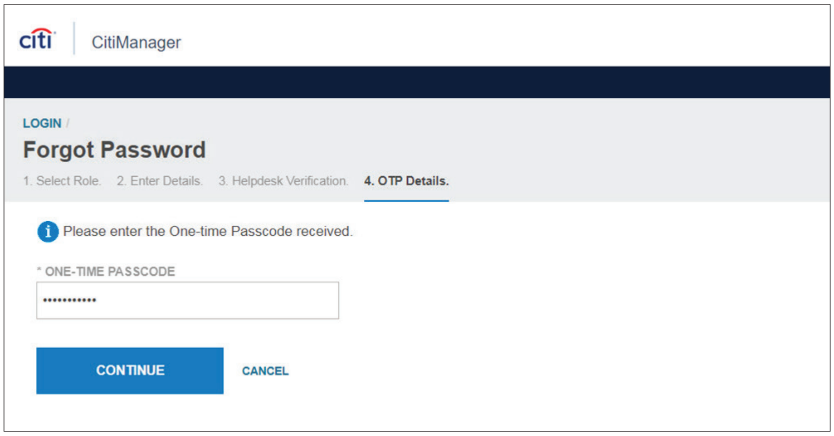
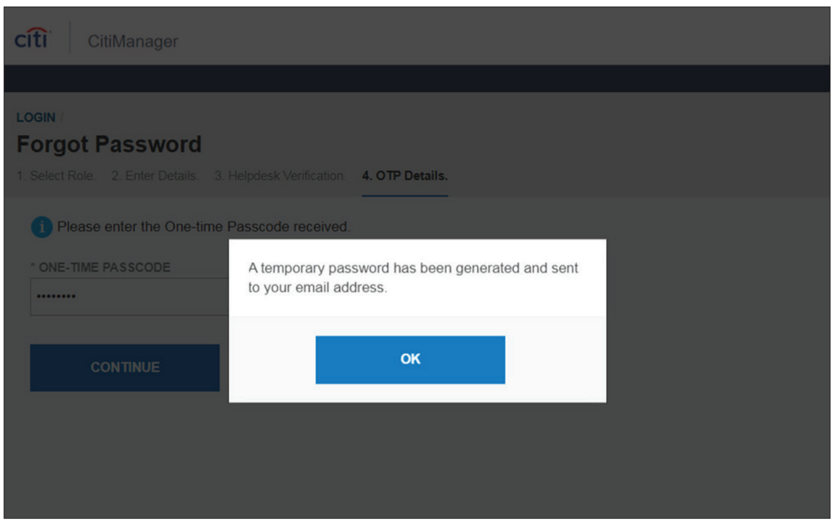
Screen	Step/Action
 **CitiManager Site Login Screen**	1. Navigate to **www.citimanager.com/login**. *The CitiManager Site Login screen displays.* 2. Click the **Forgot Password** link. *The Forgot Password — Select Role screen displays.*

Screen	Step/Action
 **Forgot Password — Select Role Screen**	3. Select the **Non Cardholder/Card Applicant** role radio button and click the **Continue** button. *The Forgot Password — Enter Details screen displays.*
 **Forgot Password — Enter Details Screen**	4. In the **Username** field, type your username. 5. In the **Zip/Postal Code** field, type the zip code associated with your user profile. 6. In the **Email Address** field, type the e-mail address associated with your user profile. 7. In the **Confirm Email Address** field, re-type the e-mail address associated with your user profile. 8. To validate the information entered, click the **Continue** button. *The Forgot Password — Helpdesk Verification screen displays.*

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


Forgot Password — Helpdesk Verification
</td><td>
9. In the Helpdesk Verification Answer field, type the answer to the verification question.
10. Click the Continue button.
The Forgot Password — OTP Details screen displays.
</td></tr>
<tr><td>


Forgot Password — OTP Details — Select OTP Option
</td><td>
11. From the OTP Details screen, select the appropriate contact option and click the Continue button.
A confirmation message displays indicating a temporary message has been created and set to your email address.
</td></tr>
</table>

Screen	Step/Action
 **Forgot Password — Enter OTP Details**	12. In the **One-Time Passcode** field, type the passcode you were provided and click the **Continue** button. *A confirmation message displays indicating a temporary message has been created and sent to your email address.*
 **Forgot Password — Temporary Password Message Screen**	13. Click the **OK** button. *The CitiManager Site Login screen displays.*

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