

CitiManager[®] Site User Guide

Commercial Card

Cardholder

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User Guide Overview

Document Scope

This CitiManager® Site User Guide provides detailed step-by-step instructions for all CitiManager Site functions available to Cardholders.

For a consolidated user guide, refer to the **CitiManager Quick Start Guide for Cardholders**.

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. 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.

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.

Web-browser Compatibility

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

Getting Started in CitiManager

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:

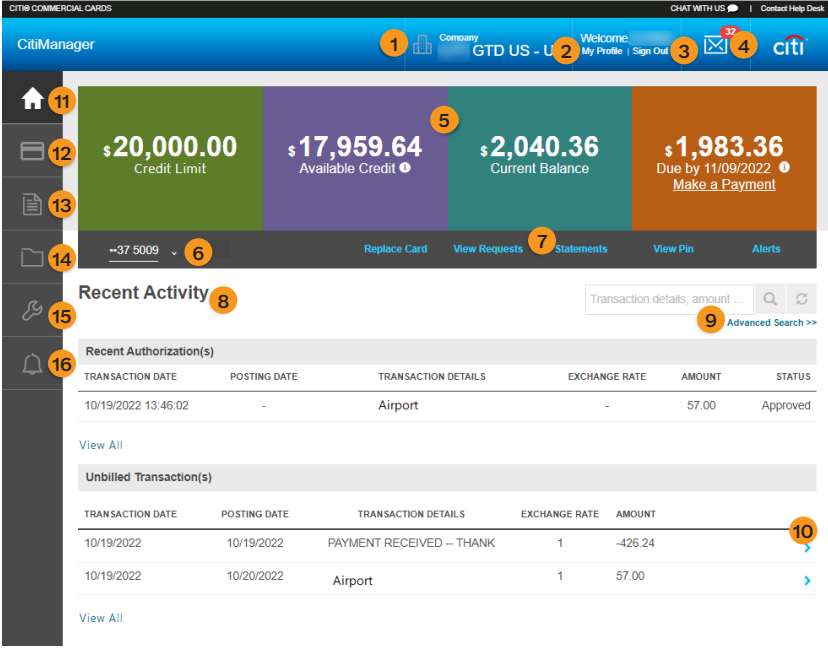
- Retrieve a forgotten username or password
- View recent activity and current and past statements
- View credit limits, total balances and transaction level detail
- Make a payment
- Request a refund
- Manage e-mail and mobile alerts
- Dispute a transaction and view the dispute once it's submitted
-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

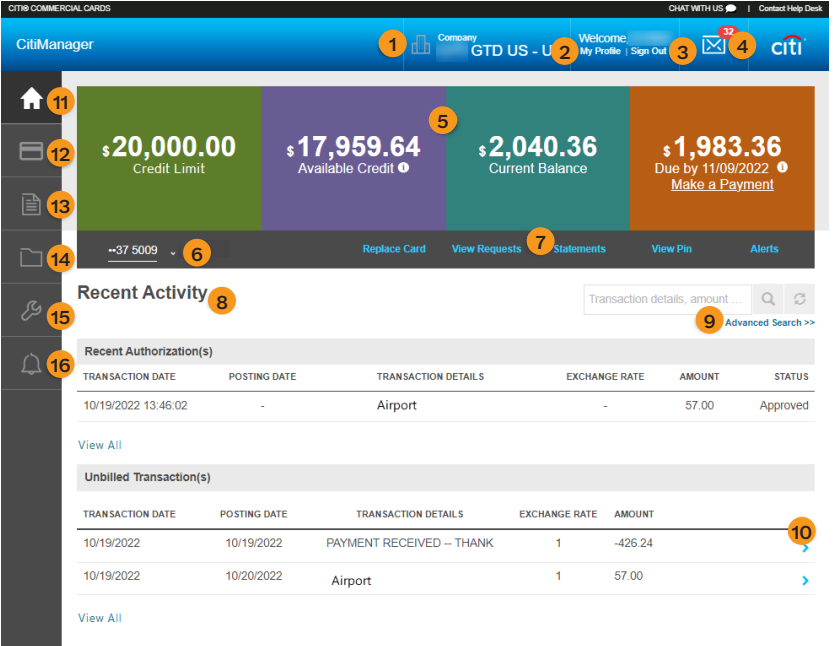
Basic Navigation

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

Screen	Descriptions
 <p>The screenshot shows the CitiManager Home Screen. At the top, there's a header with the Citi logo and navigation links. Below the header, there's a dashboard section with four large tiles: Credit Limit (\$20,000.00), Available Credit (\$17,959.64), Current Balance (\$2,040.36), and Amount Due (\$1,983.36). Below the dashboard, there's a 'Recent Activity' section with a table of transactions. The table has columns for Transaction Date, Posting Date, Transaction Details, Exchange Rate, Amount, and Status. The first transaction is dated 10/19/2022 and is for an 'Airport' transaction. Below the table, there's a 'View All' link. The second section is 'Unbilled Transaction(s)' with a similar table. The first transaction is dated 10/19/2022 and is for a 'PAYMENT RECEIVED - THANK' transaction. Below the table, there's a 'View All' link. The bottom of the screen has a navigation bar with icons for Home, Cards, Recent Activity, and Alerts.</p>	<h3>Header</h3> <ol style="list-style-type: none"> 1. Your company name displays at the top of the screen. If you have access to more than one company, you may select another one using the drop-down list. 2. Click the My Profile link to access or modify your profile details. 3. Click the Sign Out link to log out of the CitiManager Site. 4. Click the Envelope icon to view the Message Board. <h3>Screen Components</h3> <ol style="list-style-type: none"> 5. The dashboard section allows you to view high-level 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. 6. The Account drop-down allows you to toggle between card accounts if you have more than one. If you have multiple cards for your primary company, you can click the tooltip icon to navigate to My Profile to set a default card. 7. Use the quick links to navigate to the Request History, Statements, View PIN and Alerts Subscription screens.

Screen	Descriptions
 <p>The screenshot shows the CitiManager interface for a Citi Commercial Card. The top navigation bar includes links for 'Company', 'GTD US - U', 'Welcome', 'My Profile', 'Sign Out', '32', and 'citi'. The main content area displays four key metrics: Credit Limit (\$20,000.00), Available Credit (\$17,959.64), Current Balance (\$2,040.36), and a payment due date (11/09/2022) for \$1,983.36. Below these are buttons for 'Replace Card', 'View Requests', 'Statements', 'View Pin', and 'Alerts'. The 'Recent Activity' section shows a table of recent authorizations and unbilled transactions. The 'Side Navigation Bar' on the left contains icons for Home, Cards, Statements, Resources, Tools, and Alerts, each with a numbered callout.</p>	<p>Side Navigation Bar</p> <ol style="list-style-type: none"> In the Recent Activity section, you can view Recent Authorizations which are authorized or declined transactions that have not yet posted to the account and Unbilled Transactions which have posted since your last statement and will appear on the next one. When transactions display, 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. For each transaction row, a > Forward arrow displays on the right side, which you can click to navigate to the Statements screen. Click the Home button to return to the Home screen. 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. Click the Statements button to select a monthly statement to view and also view recent activity, change your paperless settings and view disputes. Click the Resources button to view messages, access FAQs and Links & Help. Click the Tools button to navigate to other online tools if you have access. Click the Alerts button to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.

Choose Your Language

Key Concepts

The CitiManager Site is available in 28 languages. You can change the language in which the CitiManager Site displays by selecting it from the **Login** screen before you log in to the site.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login . <i>The CitiManager Site Login screen displays.</i>
2.	From the language drop-down list that displays on the top right corner, select the desired language. <i>The CitiManager Site text displays in the selected language.</i>

Apply for New Card Using an Invitation Passcode

Key Concepts

For individual online applications, an Invitation Passcode and the inviter's e-mail address are required so you can register for the CitiManager Site and apply for a new card. 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 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

Step	Action
1.	Navigate to www.citimanager.com/login . <i>The CitiManager Site Login screen displays.</i>
2.	From the CitiManager Site Login screen header section, click the Apply for a Card Today link. <i>The User Registration screen displays.</i>
3.	Select the Invitation Passcode radio button.
4.	Click the Continue button. <i>User Registration — Invitation Passcode/Inviter's Emails screen displays.</i>
5.	In the Invitation Passcode field, type the Invitation Passcode sent to you by your Program Administrator. Note: The Invitation Passcode is case sensitive.
6.	In the Inviter's E-mail Address field, type the inviter's e-mail address sent to you by your Program Administrator.
7.	Click the Continue button. <i>The User Registration — Sign-on Details screen displays.</i> Note: All new applicants are required to create a user profile for the CitiManager Site during the application process.

Step	Action
8.	<p>In the Username field, type a username that meets the username requirements.</p> <p>Note: The username requirements display in a window as you type your username. A checkmark displays when the requirements are fulfilled.</p>
9.	<p>In the Password field, type a password that meets the password requirements.</p> <p>Note: The password requirements display in a window as you type your password. A checkmark displays when the requirements are fulfilled.</p>
10.	In the Confirm Password field, re-type the password.
11.	<p>From the Helpdesk Verification Question drop-down list, select the verification question.</p> <p>Note: You may be asked this question by Citi when you contact the Helpdesk for assistance or when retrieving your username or resetting your password.</p>
12.	In the Helpdesk Verification Answer field, type the answer to the verification question you selected.
13.	In the Confirm Helpdesk Verification Answer field, re-type the answer to the verification question you selected.
14.	<p>Scroll to the Personal Information section and complete the fields.</p> <p>Note: An asterisk (*) indicates a required field.</p>
15.	<p>Click the Continue button.</p> <p><i>A confirmation message displays indicating your user ID has been created.</i></p> <p>Note: The CitiManager Site sends an e-mail confirming the registration and username created.</p>
16.	<p>Click the OK button.</p> <p><i>The User Registration — Card Application Details screen displays.</i></p> <p>Note: If your company is configured for multiple companies and languages, the Country and Language screen will display. Select the applicable country and language and click the Proceed button.</p>
17.	<p>Complete the required fields on the application.</p> <p>Note: An asterisk (*) indicates a required field. If you are unable to complete the required fields, you can save the application as a draft and return to it later.</p> <p>Note: If your company allows Cardholders to add attachments, such as training certificates or statements of understanding you can attach the documents during the application process. You can add a maximum of five attachments. Supported file types include jpg, jpeg, png and pdf. Each file must be 5MB or less. Scroll to the bottom of the screen and click the View/ Upload Account Documents link. When the View Account Documents screen displays, click the Add Document button. In the Document Name field, type the name of the document (there can be no special characters in the document name). Click the Browse button and navigate to the document you want to attach and click the Open button (there can be no special characters in the file name). When the document name displays in the Select File to Upload field, click the Upload button.</p>
18.	<p>Click the Submit button.</p> <p><i>An application submission confirmation message displays.</i></p>
19.	<p>Click the OK button.</p> <p><i>The CitiManager Site Login screen displays.</i></p> <p>Note: The approving Supervisor or Program Administrator will receive an e-mail advising them that your application is awaiting their approval.</p>

Apply for New Card Using a Registration ID and Registration Passcode

Key Concepts

If your company uses the Program Administer to Card Applicant to Citi workflow for bulk-online applications, a Registration ID and Registration Passcode will be sent to you in separate e-mails so you can register for the CitiManager Site and enter your personal details on the application. Some of the information on the application will be pre-filled for you. The first part of the process will register you for the CitiManager Site, then you will complete the application. Refer to the Register for the CitiManager Site and Complete the Application procedure in this topic.

If you are already registered as a CitiManager Site user, and your Program Administrator is requesting an additional card, you will receive an e-mail with instructions for how to complete your application in the CitiManager site. Refer to the Log In to the CitiManager Site and Complete the Application procedure in this topic.

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.

Register for the CitiManager Site and Complete the Application

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login . <i>The CitiManager Site Login screen displays.</i>
2.	From the CitiManager Site Login screen, click the Apply for a Card Today link that displays on the top-right side of the screen. <i>The User Registration screen displays.</i>
3.	Select the Prefilled Application Code radio button and click the Continue button. <i>The Registration ID/Passcode screen displays.</i>
4.	In the Registration ID field, type the Registration ID sent to your e-mail address by Citi. Note: The Registration ID field is case sensitive.
5.	In the Registration Passcode field, type the Registration Passcode sent your e-mail address by Citi. Note: The Registration Passcode field is case sensitive.
6.	Click the Continue button. <i>The User Registration — Sign-on Details screen displays.</i> Note: All new Card Applicants are required to create a user profile for the CitiManager Site during the application process.
7.	In the Username field, type a username that meets the username requirements. Note: The username requirements display in a window as you type your username. A checkmark displays when the requirement is fulfilled.

Step	Action
8.	<p>In the Password field, type a password that meets the password requirements.</p> <p>Note: The password requirements display in a window as you type your password. A checkmark displays when the requirement is fulfilled.</p>
9.	In the Confirm Password field, retype the password.
10.	<p>From the Helpdesk Verification Question drop-down list, select a verification question.</p> <p>Note: You may be asked this question by Citi when you contact the Helpdesk for assistance.</p>
11.	In the Helpdesk Verification Answer field, type the answer to the verification question you selected.
12.	In the Confirm Helpdesk Verification Answer field, re-type the Helpdesk verification answer to the question you selected.
13.	<p>Scroll to the Personal Information section and complete the fields.</p> <p>Note: An asterisk (*) indicates a required field.</p>
14.	<p>Click the Continue button.</p> <p><i>A confirmation message displays indicating your user ID has been created.</i></p> <p>Note: The CitiManager Site will send an e-mail confirming the registration and username created.</p>
15.	<p>Click the OK button.</p> <p><i>The User Registration Apply for Card — Card Application Details screen displays.</i></p> <p>Note: If your company is configured for multiple companies and languages, the Country and Language screen will display. Select the applicable country and language and click the Proceed button.</p>
16.	<p>Complete the required fields on the application.</p> <p>Note: An asterisk (*) indicates a required field. If you are unable to complete the required fields, you can save the application as a draft and return to it later.</p>
17.	<p>Click the Submit button.</p> <p><i>An application submission confirmation message displays.</i></p>
18.	<p>Click the OK button.</p> <p><i>The CitiManager Site Login screen displays.</i></p> <p>Note: The application is sent to Citi for processing. You will receive your card in approximately 7-10 days.</p>

Log In to the CitiManager Site and Complete the Application

Step-by-Step Instructions

Step	Action
1.	<p>Navigate to www.citimanager.com/login.</p> <p><i>The CitiManager Site Login screen displays.</i></p>
2.	<p>From the CitiManager Site Login screen, type your User ID and password, and click the Sign On button.</p> <p><i>The Answer Challenge Question or One-time Passcode receipt option screen displays.</i></p> <p>Note: Depending on your organization's set-up, the One-time Passcode receipt option screen may display. Select how you would like to receive your one-time passcode and click the Continue button. When the eight-digit code is received, type it in the field displayed on the CitiManager Site One-time Passcode screen and click the Continue button. If you enter a OTP, you will not be prompted to answer a challenge question and the CitiManager Site Home screen displays. Continue to Step 4.</p>
3.	<p>If necessary, answer the challenge question and click the Continue button.</p> <p><i>The CitiManager Site Home screen displays.</i></p>
4.	<p>Click the View Request link from the quick links bar.</p> <p><i>The My Profile: Request History screen displays.</i></p> <p>Note: If card application is for another program type such as a Purchase or Travel card, you will need to toggle to the newly requested program. From the Company drop-down list that displays in the top-right corner of the screen, select the program.</p>
5.	<p>From the Request ID column, click the link for the request that has a Status of Draft and Request Type of Bulk Online Applications.</p> <p><i>The User Registration Apply for Card — Card Application Details screen displays.</i></p> <p>Note: If your company is configured for multiple companies and languages, the Country and Language screen will display. Select the applicable country and language and click the Proceed button.</p>
6.	<p>Complete the required fields on the application.</p> <p>Note: An asterisk (*) indicates a required field. If you are unable to complete the required fields, you can save the application as a draft and return to it later.</p>
7.	<p>Click the Submit button.</p> <p><i>An application submission confirmation message displays.</i></p>
8.	<p>Click the OK button.</p> <p><i>The CitiManager Site Login screen displays.</i></p> <p>Note: The application is sent to Citi for processing. You will receive your card in approximately 7-10 days.</p>

Register as a Cardholder

Key Concepts

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

To complete the registration process, you will need the following information:

- Your credit card number.
- The CVV security code from the back of your credit card.
- The last four digits of your Employee ID/Social Security Number that were provided to you during the application process.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login . Note: If you clicked the Click to register today! link from the Welcome to CitiManager e-mail sent to you, start the registration process from Step 3. <i>The CitiManager Site Login screen displays.</i>
2.	From the CitiManager Site Login screen, click the Register as a Cardholder link. <i>The Register for Online Access screen displays.</i>
3.	In the Credit Card Number field, type your 16-digit credit card number.
4.	In the Security Code (CVV) field, type the CVV security code that displays on the back of your credit card.
5.	Click the Continue button. <i>The verify identity screen displays.</i>
6.	In the Last 4 of Social — OR — Employee ID field, type the number that was provided by your company during the application process. This number is either the last four digits of your social security number (SSN) or the last four digits of your Employee ID depending on your company's set-up. Note: In Canada, the Date of Birth field displays. Type you date of birth in mm/dd/yyyy format or select it using the Calendar.
7.	Click the Continue button. <i>The Verification Method screen displays.</i>
8.	Select the radio button for the phone number where you want to receive the one-time passcode. Note: If you are not able to receive a one-time passcode using the available options, click the Register using temporary credentials, we'll send to the email we have on file link. The screen will refresh and a Registration ID and Passcode will be sent to your e-mail address. Enter your Registration ID and Passcode and continue to Step 12.
9.	Click the Continue button. <i>The One-Time Code field screen displays.</i>
10.	In the One-Time Identification Code field, type the one-time passcode code that was sent to the option selected. Note: The one-time passcode expires after three minutes and you have six attempts to enter it correctly. The time remaining displays at the top of the screen. If time expires before the one-time passcode is entered correctly, a message window displays. Click the Try Again button and then click the Resend code link to have a code sent again.

Step	Action
11.	Click the Continue button. <i>The Sign On Details screen displays.</i>
12.	In the Username field, type a username that meets the requirements. Note: If the username you entered already exists, you will be asked to enter a different one.
13.	In the Password field, type a password that meets the requirements.
14.	In the Confirm Password field, re-type the password.
15.	In the Primary Email Address field, verify the e-mail address that is pre-populated based on the e-mail address provided during the application process and update it if necessary. Note: This is the e-mail address that will be used as your primary e-mail address in your CitiManager Site Profile.
16.	In the Alternate Email Address (Optional) field, type an alternate e-mail address. Note: This is an optional field. The alternate e-mail address can be used for alerts.
17.	Click the Continue button. <i>The Client Services Verification screen displays.</i>
18.	From the Client Services Question drop-down list, select the question that will be used to verify your identity when you call Customer Service.
19.	In the Client Services Answer field, type the answer to the question you selected. Note: This is a free-form field and it is not case sensitive.
20.	In the Confirm Client Services Answer field, re-type the answer to the question you selected.
21.	Click the Continue button. <i>The Review and Register screen displays.</i>
22.	Review the information displayed and when you are finished, click the Register Account button. <i>The Confirmation screen displays indicating you have successfully registered your account.</i>
23.	To continue to the CitiManager Site, click the Sign On button. <i>The Security Questions screen displays.</i> Note: When you log in for the first time, you will be asked to select and answer three challenge questions. For subsequent logins, you may be asked to answer one of the challenge questions to complete the log in process.
24.	Select, answer and confirm three challenge questions and click the Save button. <i>The CitiManager Site Home screen displays.</i> Note: You cannot select a challenge question more than once.

Log In to the CitiManager Site

Key Concepts

In order to access your account information in the CitiManager Site, you must use a valid username and password and then you may be asked to answer a challenge question.

Depending on your organization's set-up, you may be prompted to enter a one-time passcode (OTP) during the log in processes. If prompted, you will select a receipt option from the available options. Once you enter the OTP, the CitiManager **Home** screen displays and you will not need to answer a challenge question.

You can only have one session of CitiManager open at a time. If you attempt to log in to a second session, either from a browser or the CitiManager — Corporate Cards App, you will be logged out.

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 **Register as a Cardholder** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login . <i>The CitiManager Site Login screen displays.</i>
2.	In the User ID field, type your username.
3.	In the Password field, type your password.
4.	Click the Sign On button. <i>The Challenge Question or One-time Passcode receipt options screen displays.</i> Note: When you log in to the CitiManager Site for the first time you must select and answer three challenge questions. Each time you log in, you may be asked to answer one of the challenge questions. Depending on your organization's set-up, the One-time Passcode receipt option screen may display. Select how you would like to receive your one-time passcode and click the Continue button. When the eight-digit code is received, type it in the field displayed on the CitiManager Site One-time Passcode screen and click the Continue button. If you enter a OTP, you will not be prompted to answer a challenge question and the CitiManager Site Home screen displays.
5.	If necessary, answer the challenge question and click the Continue button. <i>The CitiManager Site Home screen displays.</i> Note: You have three attempts to answer the challenge question correctly.

Log Out of the CitiManager Site

Key Concepts

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 tab **Close [X]** button. Even though the tab closes, your session remains open. You will either need to clear your cache or close your browser completely 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

Step	Action
1.	From the CitiManager Site header, click the Sign Out link. <i>The screen refreshes and the CitiManager Site Login screen displays.</i>

Retrieve Forgotten User ID (Username)

Key Concepts

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

To retrieve your User ID, the following information is required:

- Your full account number and the CVV (Card Verification Value) that displays on your card
- The embossed name as it appears on your card
- Challenge question answer, zip code or date-of-birth to verify your identity

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login . <i>The CitiManager Site Login screen displays.</i>
2.	Click the Forgot User ID link. <i>The Forgot User ID — Select Access Level screen displays.</i>
3.	From the Select Access Level options, click the Cardholder radio button and then click the Continue button. <i>The Forgot User ID — Enter Details screen displays.</i>
4.	In the Full Card Number field, type your full card number.
5.	In the CVV Code field, type the CVV that displays on your card.
6.	Click the Continue button. <i>The Forgot User ID — Enter Details Screen — Verify Identity fields display.</i> Note: You have three attempts to enter valid account information and then your account will be locked. Contact your Program Administrator or call the number on the back of your card for assistance.

Step	Action
7.	<p>From the Verification Method drop-down list, select how you would like to verify your identity.</p> <p>Note: You can choose to answer a challenge question or enter your zip code or date-of-birth. If your challenge questions have not been set-up or your date-of-birth or zip code have not been entered in the CitiManager Site, it will not display as option from the drop-down list. You have three attempts to validate your identity accurately and then your account will be locked. Contact your Program Administrator or call the number on the back of your card for assistance.</p> <p><i>The verification answer field displays to the right of the of the Verification Method field.</i></p>
8.	<p>Type the answer to the verification question and click the Continue button.</p> <p><i>The Forgot User ID — Choose Contact Method screen displays.</i></p>
9.	<p>Select the radio button for the desired receipt option for a one-time-passcode and click the Continue button.</p> <p><i>The Forgot User ID — Verify Code screen displays.</i></p>
10.	<p>In the Identification Code field, type the OTP that was sent you and click the Continue button.</p> <p><i>The Forgot User ID — View User ID screen displays and your User ID displays in the Retrieve User ID field. Your User ID is also sent to the e-mail address on file.</i></p>
11.	<p>To navigate to the CitiManager Site Login screen, click the Sign On button.</p> <p>Note: Click the Copy button to copy your User ID. Click the Forgot Password to reset your password.</p>

Reset Forgotten Password

Key Concepts

If you forget your password, you will need to reset it to login to the CitiManager Site.

To retrieve your password, the following information is required:

- A valid User ID (Username)
- The last six digits of your account number if you have multiple card accounts. If you only have one card account, the last six digits of you account number are not required
- Challenge question answer, zip code or date-of-birth associated with your card account to verify your identity

You can also contact your Program Administrator for help retrieving your password.

Step-by-Step Instructions

Step	Action
1.	<p>Navigate to www.citimanager.com/login.</p> <p><i>The CitiManager Site Login screen displays.</i></p>
2.	<p>Click the Forgot Password? link.</p> <p><i>The Forgot Password — Select Access Level screen displays.</i></p>
3.	<p>From the Select Access Level options, click the Cardholder radio button and click the Continue button.</p> <p><i>The Forgot Password — Enter Details screen displays.</i></p>
4.	<p>In the User ID field, type your username.</p> <p>Note: If you have more than one card account, you will also need to type the last six digits of the account number in the Last 6 Digits of Card Number field.</p>

Step	Action
5.	Click the Continue button. <i>The Forgot Password — Enter Details Screen — Verify Identity fields display.</i>
6.	From the Verification Method drop-down list, select how you would like to verify your identity. Note: You can choose to answer a challenge question or enter your zip code or date-of-birth. If your challenge questions have not been set-up or your date-of-birth or zip code are not associated with your card account, they will not display as options from the drop-down list. You have three attempts to validate your identity accurately and then your account will be locked. Contact your Program Administrator or call the number on the back of your card for assistance. <i>The verification answer field displays to the right of the of the Verification Method field.</i>
7.	Type the answer to the verification question and click the Continue button. <i>The Forgot Password — Choose Contact Method screen displays.</i>
8.	Select the radio button for the desired receipt option for a one-time-passcode and click the Continue button. <i>The Forgot Password — Verify Code screen displays.</i>
9.	In the Identification Code field, type the OTP that was sent you and click the Continue button. <i>The Forgot Password — Create a New Password screen displays.</i>
10.	In the New Password field, type your new password.
11.	In the Confirm New Password field, re-type your new password.
12.	Click the Update Password button. <i>A confirmation message displays on the CitiManager Site Login screen indicating your password has been reset.</i>

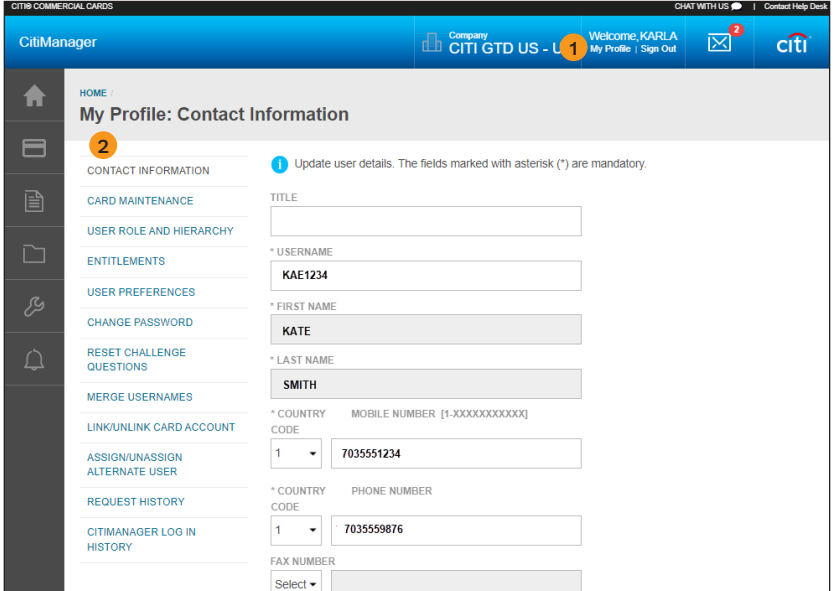
My Profile Overview

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
- View CitiManager Site log in history

My Profile Screen

Screen	Descriptions
	<ol style="list-style-type: none"> 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.

Update Contact Information

Key Concepts

There are times when it may be necessary to update the contact information associated with your CitiManager Site user profile. The following information associated with your CitiManager Site profile can be updated:

- Title
- Username
- Mobile phone number
- Phone number/contact number
- Fax number
- User profile e-mail address

To update the contact information and the address associated with your card/statement, refer to the **Perform Card Maintenance** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Contact Information link from the left-side of the screen. <i>The Contact Information screen displays.</i>
3.	Update the necessary contact details associated with your CitiManager Site profile. Note: An asterisk (*) indicates a required field. The Mobile Phone Number field is a required field. If you choose not to provide your mobile phone number, you must select the opt out checkbox. Otherwise, you will not be able to save your change. If you opt out, you will be unable to receive alerts, notifications or a one-time passcode on your mobile phone.
4.	When you are finished, scroll to the bottom of the screen and click the Save Changes button. <i>A confirmation message displays at the top of the screen.</i>
5.	To view a log of changes that have been made to your contact information, click the Audit Log link. <i>The Audit Log screen displays the date/time of change, previous and current values and the status.</i>

Perform Account Maintenance

Key Concepts

If your company allows Cardholders to perform online maintenance using the CitiManager Site, you can update the following information associated with your card/statement:

- Contact Information
- Employee ID

If your company does not allow Cardholder to perform online maintenance using the CitiManager Site this link will not display.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Card Maintenance link. <i>The Card Maintenance screen displays.</i>
3.	Make any change to the contact information associated with your card/statement and when you are finished, scroll to the bottom of the screen and click the Submit button. Note: An asterisk (*) indicates a required field. <i>A confirmation window displays.</i>
4.	Click the OK button. <i>The Request History screen displays your application and maintenance requests.</i>

View User Roles and Hierarchy

Key Concepts

In some instances users are assigned more than one role in the CitiManager Site. For example, you may have Cardholder, Non-cardholder (Program Administrator) or Supervisor access.

You can view the roles you've been assigned as well as your hierarchy.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the User Role and Hierarchy link. <i>The User Role and Hierarchy screen displays. The roles you have been assigned and your hierarchy display.</i>

View Entitlements

Key Concepts

You can view the entitlements and tools assigned to you based on your role.

Entitlements that may be assigned to you include:

- Make a payment
- View statements
- Request a refund
- View authorizations
- Manage alerts

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Entitlements link. <i>The Entitlements screen displays. By default, all the entitlements you have been assigned display.</i>

Update User Preferences

Key Concepts

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

- Helpdesk verification question and answer
- Language
- Hierarchy Sorting (Unit name or number)
- Date Format
- Time Format
- Time Zone
- Currency Format

The Helpdesk verification question/answer is used to confirm your status with Citi when you call the Helpdesk for assistance or when retrieving your username or resetting your password.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the User Preferences link. <i>The User Preferences screen displays.</i>
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. <i>A confirmation message displays at the top of the screen.</i>

Change Password

Key Concepts

While passwords in the CitiManager Site do not expire, you can change it at any time if you feel it has been compromised.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Change Password link. <i>The Change Password screen displays.</i>
3.	In the Current Password field, type your current password.
4.	In the New Password field, type your new password. Note: The password requirements display in a window as you type. An X displays for each requirement until it has been fulfilled.
5.	In the Confirm New Password field, re-type your new password.
6.	Click the Change Password button. <i>A confirmation message displays at the top of the screen.</i>

Reset Challenge Questions

Key Concepts

Because the CitiManager Site requires dual authentication you may need to answer an additional security question after you enter your username and password during the log in process.

You must select and answer three challenge questions when initially registering for the CitiManager Site and when you reset your existing challenge questions.

You may change your challenge questions and/or their answers at any time. Once you submit the request to reset your challenge questions, you need to log in to the CitiManager Site and when prompted select and answer your new challenge questions.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Reset Challenge Questions link. <i>The Reset Challenge Questions screen displays prompting you to answer one of your existing challenge questions.</i>
3.	Type the answer to the existing challenge question displayed.
4.	Click the Confirm button. <i>A confirmation message displays at the top of the screen. The next time you log in to the CitiManager Site, you will be prompted to select and answer three new challenge questions.</i>
5.	From the CitiManager Site Login screen, type your username and password and then click the Login button. <i>The set security challenge question screen displays.</i>

Step	Action
6.	Select your three challenge questions from the drop-down list and then type the answer for each. Note: You must select three different questions and the answer for each must be unique and have at least three characters. If you enter inaccurate information, click the Clear button before saving.
7.	Click the Save button. <i>The CitiManager Home screen displays.</i>

Merge Usernames

Key Concepts

As a CitiManager Site user you may have more than one username based on your role or responsibilities. If this is the case, you can merge two active usernames into one, eliminating the need to log in separately to each account and manage each separately. After the merge is complete, the alternate username will be deactivated.

Be sure to merge any usernames for which you have fewer permissions into the one that has the most permissions. This will ensure that you have all the permissions you are entitled to under one username.

Before you merge your usernames, be sure you are logged in to the CitiManager Site using the username you wish to keep. This username will be kept as the primary username.

You can only merge two usernames at a time. You must repeat the merge process to add additional accounts.

If you already have a card account but have not registered it in the CitiManager Site, you can link it to your existing CitiManager username without creating another login, username and password. Refer to the **Link a Card Account** topic in this User Guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Merge Usernames link. <i>The Merge Usernames screen displays.</i>
3.	Click the Start Merge button. <i>The Disclaimer screen displays.</i>
4.	Read the disclaimer information displayed and when finished click the Continue button. <i>The Login screen displays.</i> Note: By clicking the Continue button, you are acknowledging that you have read and understand the conditions for merging your usernames.
5.	In the Alternate username field, type your alternate username.
6.	In the Password field, type the password for the alternate username.
7.	Click the Continue button. <i>The Challenge Question screen displays and you are prompted to answer one of the challenge questions associated with the alternate username you are merging.</i>
8.	In the challenge question field, type the answer to the challenge question.

Step	Action
9.	Click the Complete Merge button. <i>You are logged out of system and returned to the CitiManager Log In screen</i>
10.	Log back in to the CitiManager Site using the primary username and all of your permissions will be available from that username.

Change Primary Company

Key Concepts

As a Cardholder, you may have access to accounts in different companies. When logging in to the CitiManager Site your view defaults to one of those accounts which has been set as your primary company.

While you can change the company displayed using the drop-down list that displays in the header of the CitiManager Site, you can also change the default so when you log in to the CitiManager Site the preferred company displays by default.

You cannot change your primary company if only one company is assigned to you.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Change Primary Company link. <i>The Change Primary Company screen displays.</i>
3.	Select the radio button for the company you wish to set as your default.
4.	Click the Save button. <i>The default company is saved and a confirmation message displays at the top of the screen.</i>

Set Default Card for Primary Company

Key Concepts

As a Cardholder, you may have multiple cards for your primary company. It's possible to set the default card for the company you have set as your primary company.

When you log in to the CitiManager Site, your view defaults to the account set as the default for your primary company. If you wish to view another account for that company, you can select it from the account drop-down list that displays on the left-side of the quick links bar on the **Home** screen (black bar).

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Default Card for Primary Company link from the left-side of the screen. <i>The Default Card for Primary Company screen displays.</i>

Step	Action
3.	Click the Edit button, and from the drop-down list, select the card you wish to set as the default for your selected primary company.
4.	Click the Save Changes button. <i>The card is set as the default for your selected primary company.</i> Note: If you change your default card, the new one will display after you log out of the CitiManager Site and log back in.

Link a Card Account

Key Concepts

If you already have a CitiManager username and receive details for another one, and you have not yet registered the new account in the CitiManager Site, you can link the new account to your existing user ID without creating another login, username and password.

Once you have linked your card accounts you will be able to select which account you wish to view from the **Home**, **Card Details** or **Statements** screens.

You will need the following card details for the account you wish to link:

- Card Number
- Account Name
- Address

The account name, address and zip code must match what appears on your billing statement exactly.

If you have more than one CitiManager username (for example, a Cardholder and Non-Cardholder username) and you would like to merge them so you don't have to login separately to each, refer to the **Merge Usernames** topic in this User Guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Link/Unlink Card Account link. <i>The Link/Unlink Card Account screen displays.</i>
3.	Click the Link Card Account button. <i>The Enter Your Card Information screen displays.</i>
4.	In the Card Number field, type your card number exactly as it appears on your billing statement, no spaces or dashes.
5.	In the Name on Card field, type the account name exactly as it appears on your billing statement.
6.	In the Contact Details section, type the billing address for your card exactly as it appears on your billing statement. Note: If your zip code is nine digits, then enter all nine digits. If your zip code is only five digits, then only enter five digits. An asterisk (*) indicates a required field.
7.	Click the Continue button. <i>A confirmation message and the Card Account screen display. The card account you just linked is now listed.</i>

Unlink a Card Account

Key Concepts

If you linked additional card accounts to your user profile, you can remove them when they have been closed, reported as lost-stolen and a new card has been issued.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Link/Unlink Card Account link. <i>The Card Details screen displays.</i>
3.	Select the radio button for card number you wish to remove from your user profile.
4.	Click the Unlink Card Account link. <i>The confirmation screen displays.</i>
5.	Verify you have selected the correct account and click the Confirm button. <i>A confirmation message displays at the top of the screen.</i>

Assign Alternate User

Key Concepts

You can assign alternate users to your card account so others can access your account information, make maintenance requests (if your program allows) or make payments to individually billed accounts on your behalf.

You can assign an existing CitiManager Site user or assign a new one. Complete a search for an existing user first, and if they are not currently registered as a CitiManager Site user they must be created first. Once they are created, registration details will be sent to the new user. When the user completes the registration process they will be assigned as your alternate user.

Step-by-Step Instructions

To Assign Existing User

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Assign/Unassign Alternate User link. <i>The Alternate User screen displays.</i> Note: If there is already an alternate user assigned to your card account, their name will be listed. To unassign the user, refer to the Unassign Alternate User topic in this user guide.
3.	Click the Assign link. <i>The Search/Create User screen displays.</i>

Step	Action
4.	<p>Type your search criteria and click the Search button.</p> <p><i>A list of users that meet your search criteria displays.</i></p> <p>Note: If the user you searched for is not a current user, a message displays indicating there are no alternate users available. You will need to create them before they can be assigned. Refer to the Assign a New User steps in this topic for additional information.</p>
5.	<p>Click the radio button for the user to be assigned and click the Add User button.</p> <p><i>A confirmation displays and you are returned to the Alternate User screen and the assigned user name displays.</i></p>

Step-by-Step Instructions

To Assign a New User

Step	Action
1.	<p>From the CitiManager Site header, click the My Profile link that displays under your name.</p> <p><i>The User Preferences screen displays.</i></p>
2.	<p>Click the Assign/Unassign Alternate User link.</p> <p><i>The Alternate User screen displays.</i></p>
3.	<p>Click the Assign button.</p> <p><i>The Search/Create User screen displays.</i></p>
4.	<p>Click the Create User link displayed in the Search Users header.</p> <p><i>The Create User screen displays.</i></p>
5.	<p>Complete the required fields in the Personal Details, Contact Details, User Role(s) and Entitlements sections.</p> <p>If necessary, click the + (expand) button to view the fields for each section.</p> <p>Ensure you have reviewed and as necessary modified the selections in the Entitlements section. Statements and Unbilled Transactions (Recent) are not considered default entitlements.</p> <p>Note: An asterisk (*) indicates a required field.</p>
6.	<p>When you are finished with all sections, click the Continue button.</p> <p><i>The Confirm User screen displays.</i></p>
7.	<p>Review the details you entered for the new user. When you are finished, click the Save button.</p> <p><i>A confirmation message displays indicating the user has been successfully created.</i></p> <p>Note: Registration details will be sent to the new user so they can create a username and password for the CitiManager Site.</p>
8.	<p>Click the OK button.</p> <p><i>The Alternate User screen displays.</i></p> <p>Note: The new user's name displays with a status of Unregistered. Once the user completes the registration process the status will change to Registered and they will have access to your account.</p>

Unassign Alternate User

Key Concepts

If you have assigned an alternate user to your card account, you can unassign them if you no longer want them to have access to your information.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Assign/Unassign Alternate User link. <i>The Alternate User screen displays the name(s) of alternate users you have assigned to your card account.</i> Note: If no alternate users are assigned, a message displays indicating no alternate users are available. You can assign an alternate user by clicking the Assign button.
3.	Select the checkbox for the user you wish to unassign from your card account.
4.	Click the Unassign button. <i>A confirmation screen displays.</i>
5.	Verify the name displayed is the user you wish to unassign and click the Confirm button. <i>A confirmation displays at the top of the screen.</i>

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the My Profile link that displays under your name. <i>The User Preferences screen displays.</i>
2.	Click the Request History link. <i>A list of application and maintenance requests display.</i> Note: If there are no requests, a message displays indicating there are no requests for this user. You can sort the requests by clicking on header in which you'd like to sort the requests.
3.	To view the hierarchy, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.

Step	Action
4.	<p>To view the details of a specific request, from the Request ID column, click the link for the desired request.</p> <p><i>The application or maintenance request details display with the approval history.</i></p> <p>Note: To view additional information from the Contact Information, Additional Information, Spending Controls sections or to view the CitiManager Cardholder Account Agreement, click the + (expand) button from the section header as necessary.</p> <p>To view the Audit Log, scroll to bottom of screen and click the View Audit Log button. When you are finished, click the Back button.</p> <p>To return to the list of maintenance requests, click the Cancel link at the bottom of the screen then click the OK button.</p>

View CitiManager Log In History

Key Concepts

When you first log in to the CitiManager Site, a message at the top of the **Home** screen displays your login history. You can also view this information from the **CitiManager Log In History** screen.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site header, click the My Profile link that displays under your name.</p> <p><i>The User Preferences screen displays.</i></p>
2.	<p>Click the CitiManager Log In History link.</p> <p><i>The CitiManager Log In History screen displays your login history.</i></p>

Cards Overview

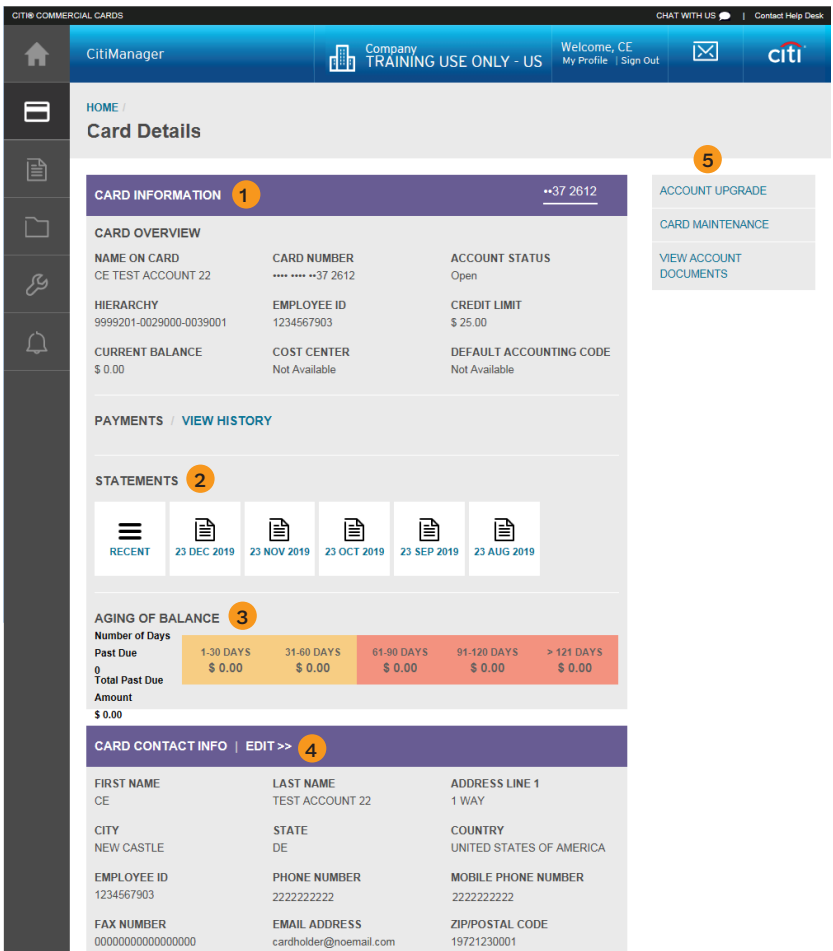
Description

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 update account contact information, request a refund and view refund requests.

Card Details Screen

Screen	Descriptions
 <p>The screenshot displays the CitiManager interface for a cardholder. At the top, there's a navigation bar with 'CitiManager', 'Company TRAINING USE ONLY - US', and user information. The main content area is titled 'Card Details'. It includes sections for 'CARD INFORMATION' (with a callout 1), 'PAYMENTS / VIEW HISTORY', 'STATEMENTS' (with a callout 2), 'AGING OF BALANCE' (with a callout 3), and 'CARD CONTACT INFO EDIT >>' (with a callout 4). A sidebar on the left contains navigation icons. A callout 5 points to a menu on the right with options like 'ACCOUNT UPGRADE', 'CARD MAINTENANCE', and 'VIEW ACCOUNT DOCUMENTS'.</p>	<ol style="list-style-type: none"> 1. View card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code and payment information. 2. Links to recent transaction activity, and current and previous statements. 3. Aging of balance information (1 – 120 Days). 4. Contact information associated with your card/statement. 5. Links to perform account maintenance, view account documents and view your PIN.

View Card Details

Key Concepts

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

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, click the Cards icon.</p> <p><i>The Card Details screen displays.</i></p> <p>Note: If you have more than one card account, click the account number drop-down arrow in the Card Information header to toggle between accounts.</p>
2.	<p>View the desired card account information in the Card Overview, Payments, Statements, Aging of Balance and Card Contact Info sections.</p>
3.	<p>If your company allows it you can view payment history. From the Payments section, click the View History link. If you are not entitled, this link will not display.</p> <p><i>The Scheduled & Last Payments screen displays showing pending payments and past payments.</i></p> <p>Note: To search for a specific transaction amount, date or pay from account number, type the search criteria in search field that displays in the upper-right corner and click the Search button. Click the Advanced Search link to access additional search criteria.</p>
4.	<p>To view recent transactions that have posted to your account but not yet billed to your statement, click the Recent icon from the Statements section.</p> <p><i>The Statements screen displays defaulting to recent activity. A summary of activity displays at the top of the screen and transactions display at the bottom of the screen.</i></p> <p>Note: Recent transactions will appear on your next statement. The recent activity summary is not a final statement.</p> <p>To search recent activity by transaction details (merchant), an amount or date, type the search criteria in search field that displays in the upper-right corner and click the Search button. Click the Advanced Search link to access additional search criteria.</p> <p>For additional information about viewing/downloading recent activity, refer to the View and Download Recent Activity topic in this user guide.</p>
5.	<p>To view previous statements, from the Statements section, click the icon for the statement date you wish to view.</p> <p><i>The Statements screen for the selected date displays.</i></p>
6.	<p>If your company allows it, you can maintain the contact information associated with your card/statement. On the right side of the screen, click the Card Maintenance link.</p> <p><i>The Card Maintenance screen displays.</i></p> <p>Note: For additional information about performing card maintenance online, refer to the Perform Card Maintenance topic in this user guide for additional information.</p>

Perform Card Maintenance

Key Concepts

If your company allows Cardholders to perform online maintenance using the CitiManager Site, you can update following information associated with your card/statement:

- Contact Information
- Employee ID

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, click the Cards icon.</p> <p><i>The Card Details screen displays.</i></p> <p>Note: If you have more than one card account, click the card number link from the Card Information header to toggle between accounts.</p>
2.	<p>On the right side of the screen, click the Card Maintenance link.</p> <p><i>The Form screen displays.</i></p>
3.	<p>Make any change to the contact information associated with your card/statement and when you are finished, scroll to the bottom of the screen and click the Submit button.</p> <p>Note: An asterisk (*) indicates a required field.</p> <p><i>A confirmation message displays at the top of the screen.</i></p>

View and Attach Account Documents

Key Concepts

You can view and attach documents (such as certificates of training or signed statements of understanding) to your account in the CitiManager Site and they will stay with your account if you should move to another location. This will assist in the tracking of training certificates and statements of understanding.

Each file must be 5MB or less. The following file types are supported:

- .jpg
- .jpeg
- .png
- .pdf

You can view, attach and delete account documents.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, click the Cards icon.</p> <p><i>The Card Details screen displays.</i></p>
2.	<p>On the right side of the screen, click the View Account Documents link.</p> <p><i>The View Account Documents screen displays.</i></p>

Step	Action
3.	<p>To attach a new document:</p> <ol style="list-style-type: none"> Click the Add Document button. <i>The upload window displays.</i> In the Document Name field, type the name of the document. The document name cannot contain any special characters. Click the Browse button and navigate to the document you want to attach then click the Open button. <i>The upload window displays and the name of the document to be attached displays in the Select File to Upload field.</i> Click the Upload button. <i>The document is attached and the name will display on the View Accounts Documents screen.</i> <p>To view an attached document:</p> <ol style="list-style-type: none"> From the Document Name column, click the link for the document you wish to view. <i>The document to be downloaded window displays.</i> Click the Download button. <i>A message displays indicating the document may be cached to your computer.</i> Click the OK button. <i>A confirmation message displays at the top of the screen and the browser open/save options window displays.</i> Click the Open button. <i>The document opens.</i> <p>To download an attachment:</p> <ol style="list-style-type: none"> Click the Download link that displays at the top of the screen. <i>The format window displays.</i> Select the desired format for the download and click the Download button. <i>A message displays indicating the document may be cached to your computer.</i> Click the OK button. <i>A confirmation message displays at the top of the screen and the browser open/save options window displays.</i> Click the Save button. <i>A message displays indicating the download is complete.</i> <p>To delete an attachment:</p> <ol style="list-style-type: none"> Click the Delete link for the document you wish to delete. <i>A confirmation message displays.</i> Click the OK button. <i>The document is deleted.</i>

View PIN

Key Concepts

During the card activation process, you were prompted to set up a four-digit PIN as an extra layer of security.

Some merchants require that you to enter your PIN to complete a transaction.

If you need to retrieve your PIN if it's forgotten, you can look it up from the CitiManager Site website or the CitiManager — Corporate Cards App.

If you need to reset your PIN, please contact Citi using the number on the back of your card.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site Home screen, click the View Pin link that displays on the black bar.</p> <p><i>The View PIN screen displays.</i></p> <p>Note: You can also click the Cards icon from the CitiManager Site side navigation bar and when the Card Details screen displays, click the View PIN link that displays on the right-side of the screen.</p>
2.	<p>In the One Time Passcode field, type the One Time Passcode you received and click the Continue button.</p> <p><i>The View PIN screen displays the last four digits of your card number and your PIN.</i></p>

Replace Lost/Stolen/Never Received/Damaged Card

Key Concepts

When a card has been lost, stolen, never received or damaged you are able to:

- Initiate a card replacement in the CitiManager Site.
- Choose the shipping address (either current mailing address or an alternate).
- Choose a delivery method (standard or expedite if available based on your company's set-up).

When there is fraud, the system places a temporary block on the account, and you are asked to call Customer Service to report the fraudulent transaction(s) and arrange for a replacement card.

You are only allowed to initiate the replacement if last card issued date has elapsed 15 days.

The steps required for initiating a replacement card vary based on the reason for the request. Complete the appropriate procedure based on one of the scenarios outlined below:

- Initiate replacement for lost, stolen or never received card — fraudulent activity.
- Initiate replacement for lost, stolen or never received card — no fraudulent activity.
- Initiate replacement for damaged card.

Initiate Replacement For Lost, Stolen Or Never Received Card — Fraudulent Activity

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, click the Cards icon.</p> <p>Note: You can also click the Replace Card link that displays on the black navigation bar in the center of the Home screen and continue to Step 3.</p> <p><i>The Cards Detail screen displays.</i></p>
2.	<p>Click the Replace Lost/Stolen/Never Received/Damaged Card link that displays on the right-side of the screen.</p> <p><i>The Replace Lost/Stolen/Never Received/Damaged Card — Card Details screen displays.</i></p> <p>Note: This link only displays if status of the card is Open.</p>
3.	<p>Review the information displayed in the Card Information section to verify the correct card was selected and from the Select Reason drop-down list, select either Lost, Stolen, or Never Received.</p>
4.	<p>From the Have you noticed any fraudulent transactions on your card options, select the Yes radio button.</p>
5.	<p>Click the Continue button.</p> <p><i>A message displays indicating the card will be blocked immediately.</i></p>
6.	<p>Click the OK button.</p> <p><i>A confirmation window displays indicating the card has been temporarily blocked and to contact Customer Service.</i></p> <p>Note: Please call Customer Service to report the fraudulent transaction(s) and arrange for a replacement card.</p>
7.	<p>Click the OK button.</p>

Initiate Replacement For Lost, Stolen Or Never Received Card — No Fraudulent Activity

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, click the Cards icon.</p> <p>Note: You can also click the Replace Card link that displays on the black navigation bar in the center of the Home screen and continue to Step 3.</p> <p><i>The Cards Detail screen displays.</i></p>
2.	<p>Click the Replace Lost/Stolen/Never Received/Damaged Card link that displays on the right-side of the screen.</p> <p><i>The Replace Lost/Stolen/Never Received/Damaged Card — Card Details screen displays.</i></p> <p>Note: This link only displays if status of the card is Open.</p>
3.	<p>Review the information displayed in the Card Information section to verify the correct card was selected and from the Select Reason drop-down list, select either Lost, Stolen, or Never Received.</p>
4.	<p>From the Have you noticed any fraudulent transactions on your card options, select the No radio button.</p>
5.	<p>Click the Continue button.</p> <p><i>Either the OTP Details or Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i></p>

Step	Action
6.	<p>If a One-time Passcode is necessary, complete the following steps. Otherwise, continue to Step 9.</p> <ol style="list-style-type: none"> Select the radio button for the desired receipt option and click the Continue button. Once received, type the One-time Passcode and click the Continue button. <i>The Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i>
7.	<p>From the Shipping Options section, select either the radio button for Current Mailing Address or Alternate Address. If Alternate Address is selected, complete the Address Line 1, City, State and Postal Code fields.</p> <p>Note: If the card has a Bulk/Site address associated to it, the Alternate Address field will not display. Only a Program Administrator can request a card to be shipped to an alternate address.</p>
8.	From the Delivery Method section, select the radio button for desired delivery method.
9.	<p>Click the Submit button.</p> <p><i>A confirmation message displays, and the card will be blocked effective immediately.</i></p> <p>Note: If you are shipping the card to the default address and standard shipping is selected, a message displays that the card will be delivered within 7-10 days.</p> <p>If expedited shipping is selected, a message may display based on your company's set-up indicating the account will be charged a fee for expedited services.</p> <p>If a replacement card was previously requested and a subsequent replacement card request is being made while the first card could still be in the mail (within the expected delivery time), a message will display indicating a card has been recently issued on a specified date. Please allow ten business for that card to arrive. If you still need to report the card lost or stolen please contact Customer Service. If the expected delivery time for the replacement card has past and that card is lost, a message displays indicating that the card has been temporarily blocked and to contact Customer Service.</p>
10.	Click the OK button.

Initiate Replacement For Damaged Card

Step-By-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, click the Cards icon.</p> <p>Note: You can also click the Replace Card link that displays on the black navigation bar in the center of the Home screen and continue to Step 3.</p> <p><i>The Cards Detail screen displays.</i></p>
2.	<p>Click the Replace Lost/Stolen/Never Received/Damaged Card link that displays on the right-side of the screen.</p> <p>Note: This link only displays if status of the card is Open.</p> <p><i>The Replace Lost/Stolen/Never Received/Damaged Card — Card Details screen displays.</i></p>
3.	<p>Review the information displayed in the Card Information section to verify the correct card was selected and from the Select Reason drop-down list, select either Damaged/Other.</p> <p>Note: Selecting Damaged/Other initiates a card replacement and retains the existing account number.</p>
4.	<p>Click the Continue button.</p> <p><i>Either the OTP Details or Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i></p>

Step	Action
5.	<p>If a One-time Passcode is necessary, complete the following steps. Otherwise, continue to Step 8.</p> <ul style="list-style-type: none">a) Select the radio button for the desired receipt option and click the Continue button.b) Once received, type the One-time Passcode and click the Continue button. <i>The Replace Lost/Stolen/Never Received/Damaged Card — Overview screen displays.</i>
6.	<p>From the Shipping Options section, select either the radio button for Current Mailing Address or Alternate Address. If Alternate Address is selected, complete the Address Line 1, City, State and Postal Code fields.</p> <p>Note: If the card has a Bulk/Site address associated with it, the Alternate Address field will not display. Only a Program Administrator can request a card to be shipped to an alternate address.</p>
7.	<p>From the Delivery Method section, select the radio button for desired delivery method.</p>
8.	<p>Click the Submit button.</p> <p><i>A confirmation message displays.</i></p> <p>Note: If you are shipping the card to the default address and standard shipping is selected, a message displays that the card will be delivered within 7-10 days. The existing card will remain active until you receive and activate your new card.</p>
9.	<p>Click the OK button.</p>

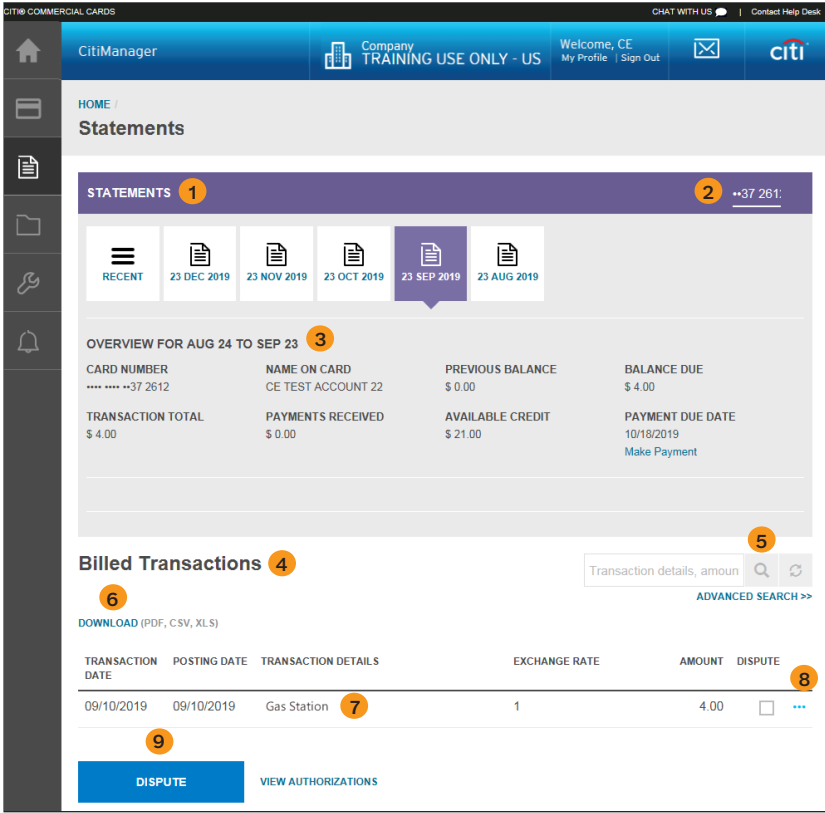
Statements Overview

Description

The **Statements** screen provides access to your recent transactions, your current statement or your previous 72 statements.

You can also download your statement and dispute a transaction.

Statements Screen

Screen	Descriptions
 <p>The screenshot shows the CitiManager interface for a commercial card. The top navigation bar includes 'CitiManager', 'Company TRAINING USE ONLY - US', and a welcome message for 'CE'. The left sidebar contains icons for Home, Statements, Transactions, and Settings. The main content area is titled 'Statements' and features a 'STATEMENTS' section with a date range selector (1) and a dropdown arrow (2). Below this is an 'OVERVIEW FOR AUG 24 TO SEP 23' (3) section with a table of account details. The 'Billed Transactions' section (4) includes a search field (5) and a 'DOWNLOAD' link (6). A table of transactions is shown below, with a 'DISPUTE' button (9) and a 'VIEW AUTHORIZATIONS' link. A transaction row is highlighted with a callout (7) pointing to the 'Gas Station' details, and a callout (8) pointing to the ellipsis link in the 'DISPUTE' column.</p>	<ol style="list-style-type: none"> 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. 2. If you have more than one card account, use the drop-down arrow to toggle between card accounts. 3. The overview section provides balance and payment information for the dates displayed. 4. A list of billed or recent transactions for the statement displays. 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. 6. Click the Download link to download a statement. 7. The list of transactions will display the transaction date, posting date, details and amount. 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. 9. Click the Dispute button to initiate a dispute after selecting the transaction checkbox(s) from the Dispute column.

View and Download Statements

Key Concepts

You can view either your current statement or your previous statements. You can also view recent transactions that have not billed to your 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 the following information:

- An account, balance and payment overview
- 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

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Statements icon and then click the icon for the statement date you wish to view. Use the Back and Forward (< >) arrows to navigate between years.</p> <p>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.</p> <p><i>The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.</i></p> <p>Note: If you have more than one card account, click the account number drop-down arrow in the Statements header to toggle between accounts.</p> <p>To view transactions that have posted to your account but not yet to your statement, click the View Recent link.</p> <p>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.</p> <p>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.</p>
2.	<p>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.</p> <p><i>The transactions are filtered by the search criteria entered.</i></p>
3.	<p>To view additional transaction detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.</p> <p><i>The row expands and additional transaction details display.</i></p> <p>Note: The More link displays when the row is expanded. When you click the More link, the Statements Action window displays and you can initiate a dispute. For additional information about disputes refer to the Dispute Transactions topic in this user guide.</p>

To Download Statements

Step	Action
1.	From the Statements screen, click the Download link that displays under the Billed Transaction header. <i>The download options display in a new window.</i>
2.	Select the radio button for the desired download format and click the Download button. Note: 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. <i>A download message displays stating that the file will be cached to your computer.</i>
3.	Click the OK button. <i>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.</i>
4.	From the browser document option window, click the Open button. <i>The document opens in the selected format.</i> 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. For Canada, the CitiManager Site cannot be used to make 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:

- Current Balance
- Payment Due
- Other Amount

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

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Statements icon and then click the Payments link.</p> <p>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).</p> <p><i>The Payments screen displays.</i></p>
2.	<p>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.</p> <p>To add a new pay from account, click the Add link from the Select Payment Account header.</p> <p><i>The Account Information window displays.</i></p>
3.	From the Account Type drop-down list, select the appropriate pay from account type.
4.	<p>In the Bank Routing Number field, type the bank routing code for the account.</p> <p>Note: The bank name will automatically populate after you type a valid routing number.</p>
5.	In the Bank Account Number field, type the account number.
6.	<p>Click the Save button.</p> <p><i>The new bank account is added.</i></p> <p>Note: To add another account, repeat Steps 2–6.</p> <p>To delete an existing account, select the radio button for the account and then click the Delete link that displays on the right side.</p>
7.	To select the desired pay from account, select the appropriate radio button.
8.	In the Select Payment Amount section, select 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.	<p>To submit your payment, click the Pay button.</p> <p><i>The Confirm Payment screen displays.</i></p>
11.	<p>Review your payment information and click the Confirm button.</p> <p><i>The Success screen displays your payment information and a confirmation displays at the top of the screen.</i></p>
12.	<p>Click the OK button.</p> <p><i>The Scheduled & Past Payments screen displays.</i></p>

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

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Statements icon and then click the View Recent link that displays at the top of the fly-out menu.</p> <p>Recent transaction activity also displays on the Home screen. Click the > More arrow that displays on the right-side of each transaction row to navigate to the Statements — Recent screen.</p> <p><i>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.</i></p> <p>Note: If you have more than one card account, click the account number drop-down arrow from the Statements header to toggle between accounts.</p>
2.	<p>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 Recent Activities section and click the Search button. Click the Advanced Search link to access additional search criteria.</p> <p><i>The transactions are filtered by the search criteria entered.</i></p>
3.	<p>To view additional transaction detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.</p> <p><i>The row expands and additional transaction details display.</i></p> <p>Note: The More link displays when the row is expanded. When you click the More link, the Statements Action window displays and you can initiate a dispute. For additional information about disputes refer to the Dispute Transactions topic in this user guide.</p>

To Download Recent Transactions

Step	Action
1.	<p>From the Statements — Recent screen, click the Download link that displays under the Recent Activities header.</p> <p><i>The download options display in a new window.</i></p> <p>Note: If you have more than one card account, click the account number drop-down arrow from the Statements header to toggle between accounts.</p>
2.	<p>Select the radio button for the desired download format and click the Download button.</p> <p>Note: The download options are Comma Separated Value (CSV) or Excel (XLS). Excel is the default option.</p> <p><i>A download message displays.</i></p>
3.	<p>Click the OK button.</p> <p><i>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.</i></p>
4.	<p>From the browser document option window, click the Open button.</p> <p><i>The document opens in the selected format.</i></p> <p>Note: Once the document is open, you can print it by selecting Print from the File menu.</p>

View Authorizations and Declined (Pending) Transactions

Key Concepts

Pending transactions are transactions that have been approved or declined by Citi but have not yet been posted to your account by the merchant. It is possible to view both authorized and declined transactions. Additional information is provided when a transaction is declined.

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over the Statements icon and then click the View Recent link that displays at the top of the fly-out menu.</p> <p>Recent transaction activity also displays on the Home screen. Click the > More arrow that displays on the right-side of each transaction row to navigate to the Statements — Recent screen.</p> <p><i>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.</i></p> <p>Note: If you have more than one card account, click the account number drop-down arrow in the Statements header to toggle between accounts.</p>
2.	<p>Scroll to the bottom of the screen and click the View Authorizations link.</p> <p><i>A list of transactions that have been authorized or declined displays. A message displays if there are no outstanding authorizations.</i></p>

View Scheduled and Past Payments (Payment History)

Key Concepts

You can view both pending and previous payment details on the **Scheduled & Past Payments** screen including the following information:

- Amount of payment
- Date of payment
- Bank routing code
- Bank name
- Pay from account
- Account type
- Status of payment

Step-by-Step Instructions

Step	Action
1.	<p>From the CitiManager Site side navigation bar, position your mouse over Statements icon and then click the Scheduled & Last Payments link.</p> <p>You can also access the Scheduled & Last Payments screen from the Card Details screen, by clicking the View History link from the Statements section.</p> <p><i>The Scheduled & Last Payments screen displays showing pending payments and past payments.</i></p>
2.	<p>To search for a specific transaction amount, date or pay from account number, type the search criteria in search field that displays in the upper-right corner and click the Search button. Click the Advanced Search link to access additional search criteria.</p> <p><i>The transactions are filtered by the search criteria entered.</i></p>

Dispute a Transaction

Key Concepts

It's possible to dispute a transaction online in the CitiManager Site if you are unable to resolve a dispute directly with the merchant. For example, you can dispute a transaction when:

- The amount billed is incorrect
- The transaction is not recognized
- There are duplicate charges
- Goods were never received
- There was a hotel or airline cancellation
- Merchandise was defective
- A refund was not received for a returned item
- There was fraud
- The transaction was paid by other means, usually cash or another card

Citi recommends contacting the merchant first using the information from your receipt as it's generally faster to resolve a dispute directly with the merchant.

To meet the processing window of the networks (MasterCard and Visa) and to ensure time for the initiation of the dispute process, disputes must be submitted within 90 calendar days from the transaction date. However, to initiate a dispute online in the CitiManager Site, the dispute must be initiated within 60 days of the statement date on which the transaction appears. After 60 days, the dispute needs to be called in to Citi if it is still within the 90-day window. The CitiManager Site loads posted transactions daily and

each transaction is available to review on the CitiManager Mobile Application. Citi recommends Cardholders enable transaction alerts and review the transactions that occur daily. Should a transaction need to be disputed, please initiate the dispute as soon as possible.

You can dispute single or multiple transactions at a time. When disputing multiple transactions, the dispute reason must be the same for all the transactions selected. If some of the transactions selected are not eligible to dispute, a message displays the ineligible reference numbers and the eligible disputes will be processed. You can dispute a maximum of ten disputes at a time.

You may be required to fax or mail additional information based on the dispute reason selected.

Step-by-Step Instructions

Step	Action
1.	<p>To navigate to recent or billed transactions, from the CitiManager Site side navigation bar, position your mouse over the Statements icon and then click the icon for the statement month you wish to view. Use the Back and Forward (< >) arrows to navigate between years.</p> <p>To navigate to recent activities, from the CitiManager Site side navigation bar, position your mouse over the Statements icon and then click the View Recent link that displays at the top of the fly-out menu.</p> <p>Unbilled transactions also display on the Home screen. Click the > arrow on the right-side of the transaction to navigate to the Statements — Recent screen.</p> <p><i>The Statements screen displays for the month selected. Recent Activity or Billed Transactions display at the bottom of the screen.</i></p> <p>Note: If you have more than one card account, click the account number drop-down arrow in the Statements header to toggle between accounts.</p>
2.	<p>From the Dispute column, click the checkbox for each of the transactions you wish to dispute and click the Dispute button.</p> <p>Note: A maximum of ten transactions can be disputed at a time. When disputing multiple transactions, the dispute reason must be the same for all the transactions selected.</p> <p><i>The Transaction Dispute — Initiate Disputes screen displays. If any of the transactions selected do not fulfill the dispute rules, a message displays listing the ineligible transactions. Click the OK button to process the remaining transactions.</i></p>
3.	<p>Click the Continue Dispute button.</p> <p>Note: The transaction details for up to three transactions display on the right-side of the screen. If you selected more than three transactions and want to view the details, click the View Transaction Details button.</p> <p><i>The Transaction Dispute — Initiate Dispute — Dispute Resolution Alert or the Transaction Dispute — Dispute Reason screen displays.</i></p>
4.	<p>If the Transaction Dispute — Initiate Dispute — Dispute Resolution Alert screen displays, complete this step. If not, continue to Step 5.</p> <p>Use the sliders to select how you would like to receive updates about the resolution of your dispute then click the Continue button.</p> <p>Note: If you select Text, you must select the Terms and Conditions checkbox to continue.</p>
5.	<p>Select the dispute reason from the available options and click the Continue button.</p> <p>Note: You must select a dispute reason to continue. Only one reason can be selected. Click the reason name to view a description.</p> <p><i>The Transaction Dispute — Questions screen displays.</i></p>
6.	<p>Answer the question(s) and complete any fields requesting additional information that display based on the reason selected.</p>

Step	Action
7.	When you are finished, click the verification checkbox to certify the information provided is accurate and then click the Continue button. <i>The Transaction Dispute — Review screen displays.</i>
8.	Review the dispute details, reason code and additional information and if correct, click the Submit Dispute button. If not, click the Back button. <i>The Dispute Transactions — Confirmation screen displays indicating if the dispute was successfully initiated.</i>
9.	If the dispute reason you selected indicated a requirement to fax or mail additional dispute information, click the Download Dispute form button and follow the instructions on the form. Note: To return to the Cardholder Details/Statement screen, click the Return to Statement/Recent Transactions link. If the dispute reason was Fraud , your card will be closed. Click the Contact Customer Service button to request a replacement card.

View Disputed Transactions

Key Concepts

Once a disputed transaction has been successfully submitted, you can view the following dispute information:

- Transaction Date, Posting Date, Detail, Amount
- Dispute Amount/Currency
- Dispute Status
- Dispute Initiation Date
- Disputed by Name
- Reference Number
- Transactions Details, Disputed Amount, Dispute Initiation Date, Dispute Status

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Statements icon and click the View Disputes link. <i>The View Disputes screen displays a list of disputed transactions.</i> Note: For inquiries or to cancel a dispute, contact Customer Service for assistance.
2.	To view additional transaction dispute detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.

Change Paperless/Paper Statement Settings

Key Concepts

The CitiManager Site allows you to opt out of receiving a paper statement or other paper notices through the mail. You will stop receiving statements the next billing cycle.

Once you opt out of receiving paper statements, you will receive an e-mail each month when your statement is ready. You can view and download your statements online at your convenience, including details for any purchase.

You must sign up to receive an e-mail alert that will notify you when a new statement is available. An e-mail is sent to the account e-mail address when the statement is ready to be viewed in the CitiManager Site. You can set your alerts by positioning your mouse

over the **Alerts** button from the side navigation bar and clicking the **Alerts** link. Refer to the **Set E-mail and Mobile Alerts** topic in this guide for additional information.

Companies can choose to only allow electronic statements. If this is true for your company, then you will automatically be opted out of paper statements. In this case, the **Go Paperless** link will not display.

Step-by-Step Instructions

To Receive Online Statements

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Statements icon and click the Go Paperless link. <i>The Go Paperless screen displays.</i>
2.	To stop receiving paper statements and other account notices, select the checkbox.
3.	Click the + Sign Click Here To Read Terms and Conditions link and review the terms and conditions associated with opting out of paper statements and then click the I Agree button. <i>A message displays asking you confirm the e-mail address on the account.</i>
4.	Click the Yes button to confirm your e-mail address. If you wish to change the e-mail address, click the No button and follow the instructions for navigating to the Alerts screen to update your e-mail address. Click the OK button to close the message. <i>The Online Payment Options message displays indicating you can continue to set up online payment options.</i>
5.	Click the Continue to Make Payment button to navigate to the Make a Payment screen and set up your payment options. Refer to the Make a Payment topic in this user guide for additional information. <i>A confirmation message displays at the top of the screen.</i>

Step-by-Step Instructions

To Receive Paper Statements

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Statements icon and click the Go Paperless link. <i>The Go Paperless screen displays.</i>
2.	De-select the checkbox.
3.	Click the I Agree button. <i>A confirmation message displays at the top of the screen.</i>

Resources

View Message Board

Key Concepts

Citi periodically posts system update and maintenance information. This information is posted to the Message Board.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and then click the Messages link. <i>The Messages screen displays who sent the message, the subject, when it was approved and type of message.</i>
2.	To view additional information about a message, click the link from the Subject column. <i>Any additional information displays.</i>
3.	To return to the list of messages, click the Back button.

Search for a Non-cardholder (Program Administrator)

Key Concepts

You can search for Non-cardholders (Program Administrator) and view the following information:

- Hierarchy Name
- Role
- Full Name
- User Profile E-mail Address

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and then click the Search link. <i>The Search Result screen displays.</i>
2.	To perform a basic search, type the name or username of the Non-cardholder and click the Search icon, OR To perform an advanced search, click the Advanced Search link. To search by Role and Hierarchy Name , click the More Options link. Enter your search criteria and click the Search button. <i>The search results display based on the search criteria entered.</i>

Access Links & Help (User Guides)

Key Concepts

You can view additional reference material such as user guides and access program support sites from the **Links/Help** screen.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Resources button and then click the Links & Help link. <i>The Links/Help screen displays.</i>
2.	Click the link for the resource you wish to access. Note: To access Cardholder user guides, click the CitiManager User Guides link. <i>A message displays indicating you will be opening an external link.</i>
3.	Click the OK button. <i>When you click on a link for an external site, a new browser window opens and you will be directed to that site. Your CitiManager Site session will remain open. If you clicked the CitiManager User Guides link, a list of user guides displays.</i>
4.	If you clicked the CitiManager User Guides link and want to open a Cardholder user guide, click the link for the desired user guide. <i>The user guide opens in Portable Document Format (PDF).</i>
5.	Once a user guide has been opened, it can be saved to your computer by clicking the Save icon. When the Save As window opens, browse to where you want to save the document and click the Save button.



Web Tools

Access Web Tools

Key Concepts

If you have been granted access to Transaction Management or Expense Management, you can access them from **Web Tools**.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Web Tools icon and then click the link for the tool you wish to open. <i>Depending on your access, a window may open displaying a list of instances available to you.</i>
2.	Click the desired link for the instance you wish to open. <i>The tool opens in a new window.</i>

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 SMS alerts based on:

- Time zone
- Time of day
- Days 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 this user guide for additional information.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Alerts icon and then click the Alerts Subscription link. <i>The Alerts Subscription screen displays.</i>
2.	To enter/edit the e-mail address(s) 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 e-mail addresses. b) Click the Save button.

Step	Action
3.	<p>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:</p> <p>a) In the Country Code and Mobile Number field, type a valid mobile phone number where you wish alerts to be sent.</p> <p>Note: Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile.</p> <p>b) Click in the Preferred Time Zone field and select your preferred time zone.</p> <p>c) Click in the From and To fields and select the time-frame in which you would like to receive alerts.</p> <p>d) From the list of weekdays, select the days you would like to receive alerts.</p> <p>e) Click the Save button.</p>
4.	<p>To subscribe to alerts, select the Email Alerts and/or SMS (Mobile Alerts) checkbox(es) for each of the alerts you wish to receive.</p> <p>To unsubscribe to alerts, deselect the Email Alerts and/or SMS (Mobile Alerts) checkbox(es) for the alerts you no longer wish to receive.</p> <p>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.</p> <p>For more information about each alert, click the information icon next to the alert name.</p> <p>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.</p>
5.	<p>When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox.</p> <p>Note: If you do not agree to the terms and conditions, you will not be able to receive alerts.</p>
6.	<p>Click the Save button.</p> <p><i>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.</i></p> <p>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.</p>

View Alert Audit Log

Key Concepts

Use the Alert Audit Log to view the following information about a change made to an alert:

- Date/Time of Change
- Changed By
- Updated Alert
- E-mail/Mobile
- Previous Status
- Current Status

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the Alerts icon and then click the Audit Log link. <i>The Alerts Audit log screen displays.</i>
2.	View the information displayed on the audit log to determine which alerts were updated, when they were changed, by whom and the current status of the alert.

Manage On-Demand Mobile Alerts

Key Concepts

In order to receive alerts on your mobile device, you must subscribe to the alerts in the CitiManager Site first. Refer to the **Manage Alert Subscriptions** topic in this user guide for additional information.

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.

For additional information about on-demand mobile alerts, from the side navigation bar, position your mouse over the **Alerts** button and then click the **On-Demand Mobile Alerts** link.

If you need to stop mobile alerts, reset your CitiManager Site password, or need additional support, choose one of the following options:

Action	Command
To suspend mobile alerts from your mobile device	Text STOP to GOCITI (462484).
To reset your CitiManager Site password	Text RESETXXXX to GOCITI (462484), where XXXX represents the last four digits of your account number (e.g., RESET1234). Note: The reset password sent to you is valid for 48 hours. You are required to change the reset password when you log into the CitiManager Site.
To receive mobile alert help on your mobile device	Text HELP to GOCITI (462484).
To view the Citi Mobile Alerts Help website which provides a list of alerts available by region	Navigate to: http://home.cards.citidirect.com/SMSHelp Note: This link is case sensitive and SMSH is capitalized.

To receive on-demand alerts from your registered mobile device, text the desired command (e.g., HIST) to **GOCITI** (462484). A list of available commands is provided in the table below.

For some on-demand mobile alerts you are required to enter the last four digits of your account number after the command. For example, to receive account balance information, text BAL1234 to **GOCITI** (462484) where 1234 represents the last four digits of the account number.

Message and data rates may apply.

To view Terms and Conditions, please visit: [Terms & Condition](#)

To view Privacy Policy, please visit: [ICG Global Privacy Statement](#)
[Commercial Cards Privacy Statement \(Outside the US and Canada\)](#)
[CA Privacy Hub](#)
[Notice at Collection](#)

Command	Description	Country Availability
BAL	To receive current balance, last payment, payment amount due, and payment due date Note: The last four digits of the account number are required. For example, text BALXXXX, where XXXX represents the last four digits of the account number.	Canada United States United Kingdom United Arab Emirates
COM	To receive information regarding valid on demand commands	Canada United States United Kingdom United Arab Emirates
CUST	To receive Citi Commercial Cards Customer Service numbers	Canada United States United Kingdom United Arab Emirates
HELP	To receive alerts help	Canada United States United Kingdom United Arab Emirates
HIST	To receive details on the three most recent posted transactions Note: The last four digits of the account number are required. For example, text HISTXXXX, where XXXX represents the last four digits of the account number.	Canada United States United Kingdom United Arab Emirates
LIMIT	To receive the available spend remaining on your account Note: The last four digits of the account number are required. For example, text LIMITXXXX, where XXXX represents the last four digits of the account number.	United Kingdom United Arab Emirates
RESET	To request password reset for the CitiManager site Note: The last four digits of the account number are required. For example, text RESETXXXX, where XXXX represents the last four digits of the account number.	Canada United States United Kingdom United Arab Emirates
STOP	To stop alerts from being sent to your registered mobile device	Canada United States United Kingdom United Arab Emirates

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Citi works with its clients in greenhouse gas intensive industries to evaluate emerging risks from climate change and, where appropriate, to mitigate those risks.

efficiency, renewable energy & mitigation