

CitiManager[®] Site Non-cardholder

Commercial Card

Quick Start Guide

June 2025

Treasury and Trade Solutions



Table of Contents

Overview	2
Document Scope	2
Your Access May Vary.....	2
A Note About Navigation	2
What Is CitiManager?.....	2
Compatible Browsers.....	2
Basic Navigation.....	3
Description	3
Register as a Non-cardholder in the CitiManager Site.....	6
Log In to the CitiManager Site.....	11
Retrieve Forgotten Username.....	12
Reset Forgotten Password	16
Search for a Cardholder and View Cardholder Details.....	20
Search for Non-cardholders and View User Account Information	24
View Statements and Recent Transactions.....	27
Perform Account Maintenance.....	31
Manage Application and Maintenance Requests (View Requests)	36

Overview

Document Scope

This CitiManager® Site User Guide provides detailed step-by-step instructions for some of the most commonly used CitiManager Site functions available to Non-cardholders.

Your Access May Vary

The functions to which you have access 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.

What Is CitiManager?

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

- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations/declines
- Review and approve/reject application and maintenance requests
- Perform account maintenance
- Create users
- Activate and deactivate users
- Assign applications and companies
- Set passcodes
- Manage alerts
- Manage your profile

Compatible Browsers

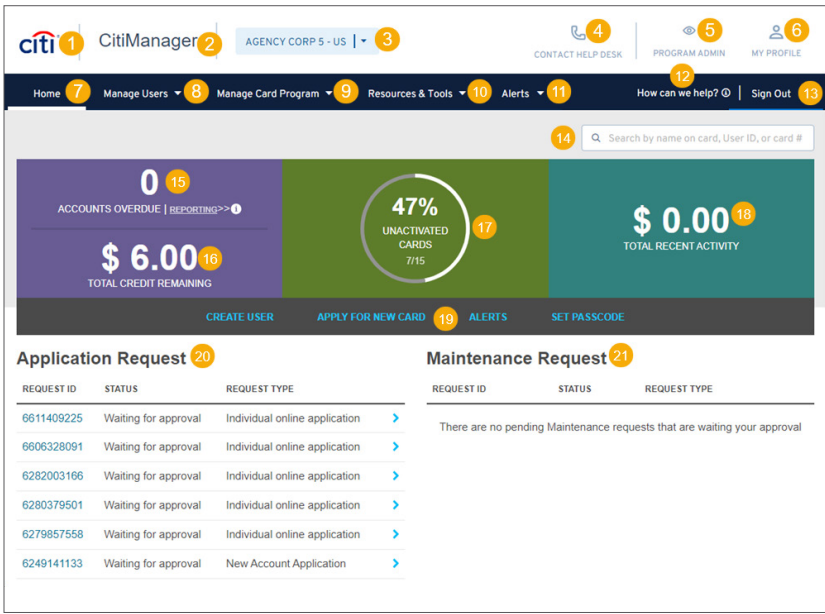
The CitiManager Site is compatible with the latest versions of Chrome and Edge.

Basic Navigation

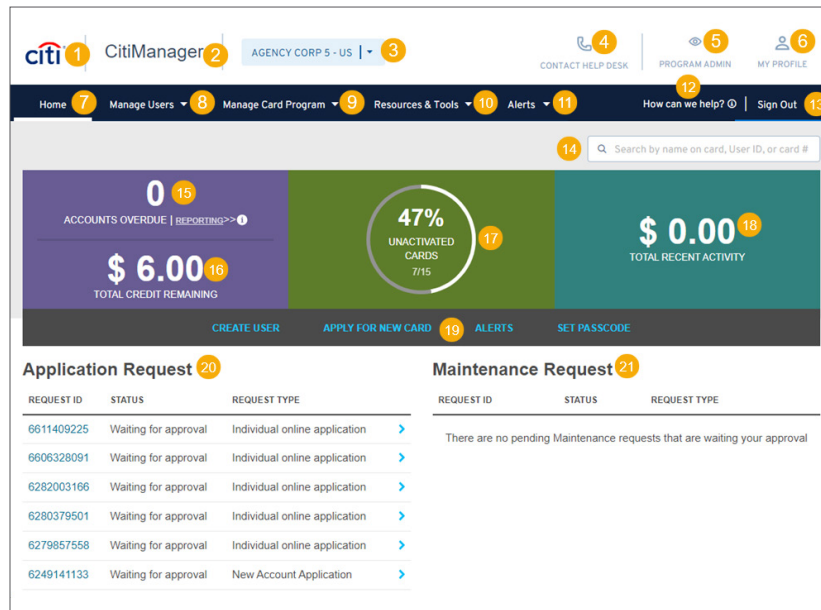
Description

After you log in to the CitiManager Site, the **Home** screen displays. The **Home** screen acts as a dashboard and displays a high level metric summary of your program — including accounts overdue, total credit remaining, number of un-activated cards and recent activity at your hierarchy level.

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

Screen	Descriptions
 <p>CitiManager Site Home Screen</p>	<p>Header</p> <ol style="list-style-type: none"> Click the Citi logo on the far left-side of the header to be directed to the Citi Commercial Cards website. Click the CitiManager link on the left-side of the header to return to the Home screen. Your company name displays on the left-side of the header. If you have access to more than one company, you may select another one using the drop-down list. If you need assistance from the Helpdesk, click the Contact Help Desk icon that displays on the right-side of the header. If you have both Cardholder and Non-cardholder access to the CitiManager Site, you can toggle between both accounts by positioning your mouse over the role icon that displays on the right-side of the header and selecting the desired role. Click the My Profile icon on the far right-side of the header to access or modify your profile details. <p>Navigation Bar</p> <ol style="list-style-type: none"> Click the Home link to return to the Home screen. Position your mouse over the Manage Users drop-down menu to complete a new card application for a Cardholder, create a new CitiManager Site account for Non-cardholders, perform a user search and view requests. Once you have completed a search, the Cardholder Details or Non-Cardholder Details screens can be used to view account information and are the launching point to perform account activities using the links on the left-side of the screen.

Screen



The screenshot shows the CitiManager Site Home Screen. At the top, there is a navigation bar with the Citi logo (1), 'CitiManager' (2), and a dropdown menu for 'AGENCY CORP 5 - US' (3). To the right of the navigation bar are links for 'CONTACT HELP DESK' (4), 'PROGRAM ADMIN' (5), and 'MY PROFILE' (6). Below the navigation bar is a secondary navigation bar with links for 'Home' (7), 'Manage Users' (8), 'Manage Card Program' (9), 'Resources & Tools' (10), 'Alerts' (11), 'How can we help?' (12), and 'Sign Out' (13). Below the secondary navigation bar is a search bar (14) with the text 'Search by name on card, User ID, or card #'. The main content area features three large cards: 'ACCOUNTS OVERDUE | REPORTING' (15) showing '\$ 6.00' (16) for 'TOTAL CREDIT REMAINING', 'UNACTIVATED CARDS' (17) showing '47%' (7/15), and 'TOTAL RECENT ACTIVITY' (18) showing '\$ 0.00'. Below these cards are links for 'CREATE USER' (19), 'APPLY FOR NEW CARD' (19), 'ALERTS' (19), and 'SET PASSCODE'. The bottom section is divided into two panels: 'Application Request' (20) and 'Maintenance Request' (21). The 'Application Request' panel shows a table with columns for 'REQUEST ID', 'STATUS', and 'REQUEST TYPE'. The 'Maintenance Request' panel shows a message: 'There are no pending Maintenance requests that are waiting your approval'.

REQUEST ID	STATUS	REQUEST TYPE
6611409225	Waiting for approval	Individual online application
6606328091	Waiting for approval	Individual online application
6282003166	Waiting for approval	Individual online application
6280379501	Waiting for approval	Individual online application
6279857558	Waiting for approval	Individual online application
6249141133	Waiting for approval	New Account Application

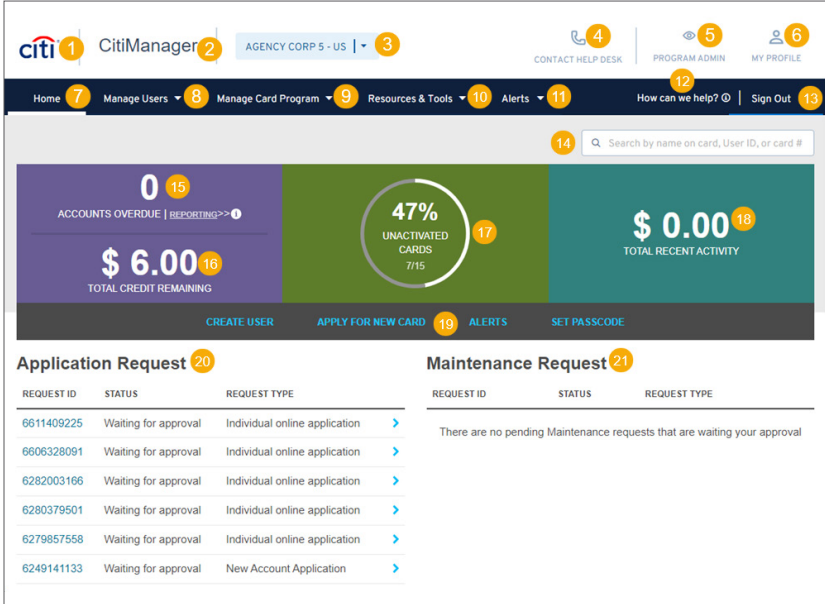
CitiManager Site Home Screen

Descriptions

9. Position your mouse over the **Manage Card Program** drop-down menu to perform bulk hierarchy transfers, perform document management (e.g. bulk online maintenance, bulk online applications, upload the supervisor list), print multiple statements, run CitiManager Reports, set alerts for a hierarchy, set passcodes and pre-fill application form data and view your hierarchy.
10. Position your mouse over the **Resources & Tools** drop-down menu to access the Learning Center, access the Library, view Links & Help, view messages and access Reporting and Expense Management if you have the entitlements. You can also perform a search for Non-cardholders to view their hierarchy, role, full name, user profile e-mail address.
11. Position your mouse over the **Alerts** drop-down menu to manage your alert subscriptions, view the audit log, and the view on-demand mobile alert information.
12. Click the **How can we help?** link to open a guided self-service window. Once the window is open you can search for a topic or click on the Quick Actions that display to open step-by-step instructions. The window will remain open until you close it so you can reference the instructions while you perform the task. The topics available are limited to frequently asked questions and are based on your entitlements. For step-by-step instructions for all functions, refer to the CitiManager Non-cardholder End-to-End Guide. The full library of User Guides and web-based training is available from the Learning Center.
13. Click the **Sign Out** link on the far right-side of the navigation bar to log out of the CitiManager Site.

Screen Components

14. From the search field located below the navigation bar on the right, you may perform a search by typing a first or last name or a card account number and then press **Enter** on your keyboard. The **Search Result** screen displays.

Screen	Descriptions
 <p>CitiManager Site Home Screen</p>	<p>15. The top of the first dashboard tile is Accounts Overdue which displays the number of accounts that are currently past due. The number of accounts displayed is recent from the previous cycle. This applies to individually billed programs only.</p> <p>16. The bottom of the first dashboard tile is Total Credit Remaining which displays the total remaining credit for the hierarchy assigned to you. This tile only displays a dollar amount for centrally billed programs. For individually billed programs, an amount does not display.</p> <p>17. The second dashboard tile is Unactivated Cards which displays the number of cards that have not been activated. The total includes both open and closed individual accounts.</p> <p>18. The third dashboard tile is Total Recent Activity which displays the total amount of activity in the current billing cycle.</p> <p>19. Use the quick links displayed below the dashboard in the middle of the screen to create a user, apply for a new card, set your personal alerts and set a passcode.</p> <p>20. In the Application Request section located below the quick links on the right-side of the screen, you can view a list of pending Application Requests that are waiting for your review.</p> <p>21. In the Maintenance Request section located below the quick links on the right-side of the screen, you can view a list of pending Maintenance Requests that are waiting for your review.</p>

Register as a Non-cardholder in the CitiManager Site

Key Concepts

As a Non-cardholder it's possible to register for the CitiManager Site so you can manage your card program.

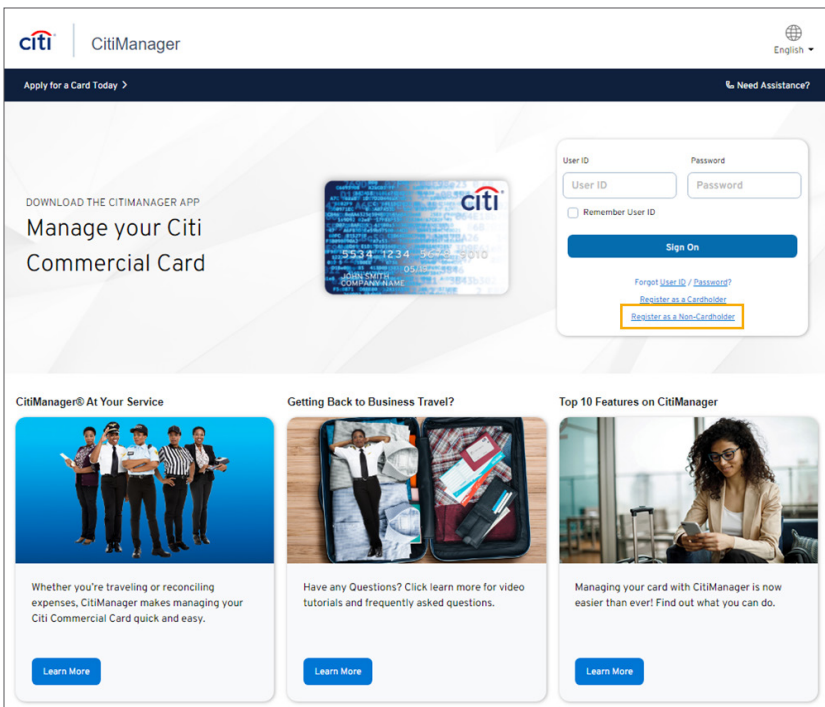
In order to register, another Non-cardholder must set up a profile first which will generate a Registration ID and a Registration Passcode.

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

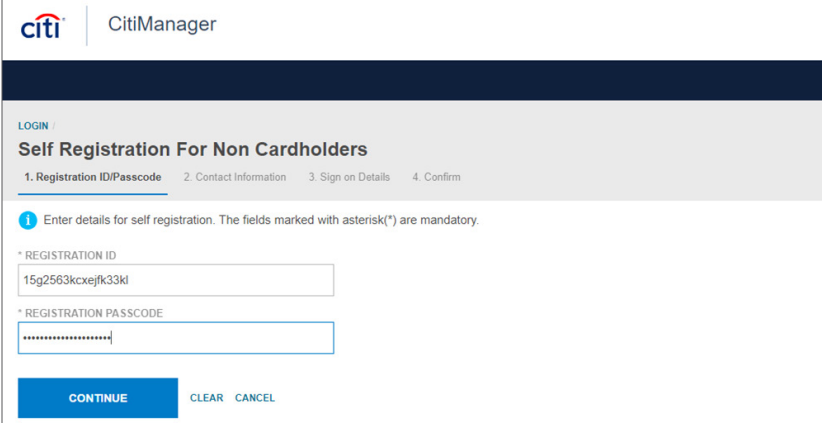
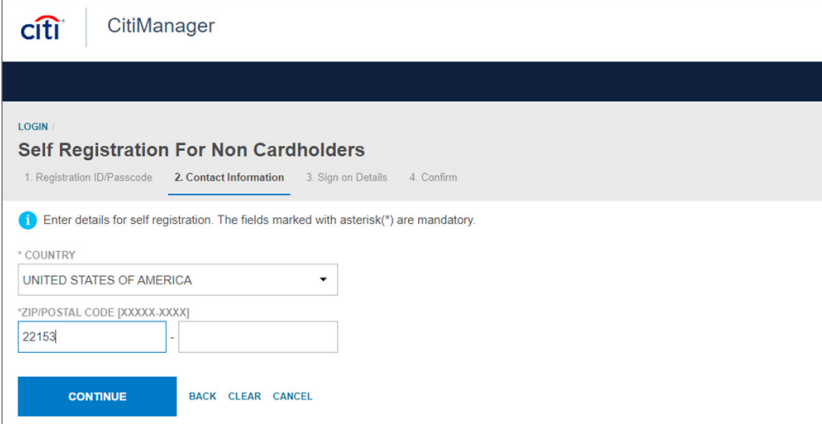
Once you receive your registration details, you must register within 60 days or your details will expire. You will be reminded every 15 days until your registration is complete.

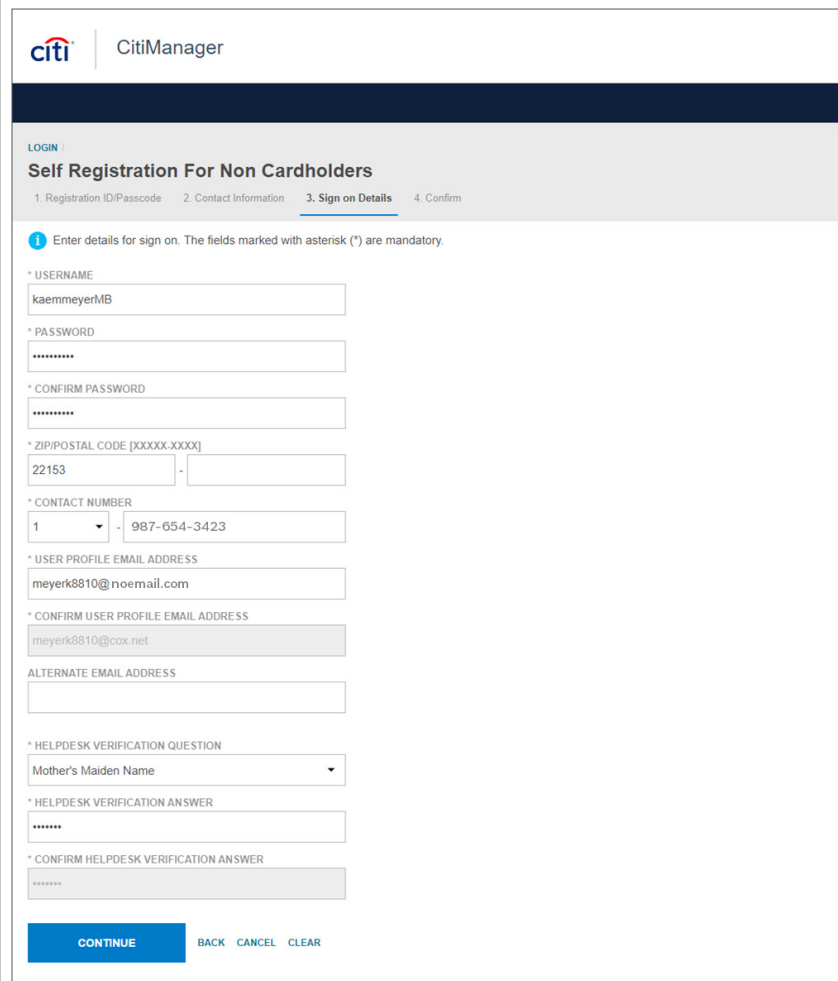
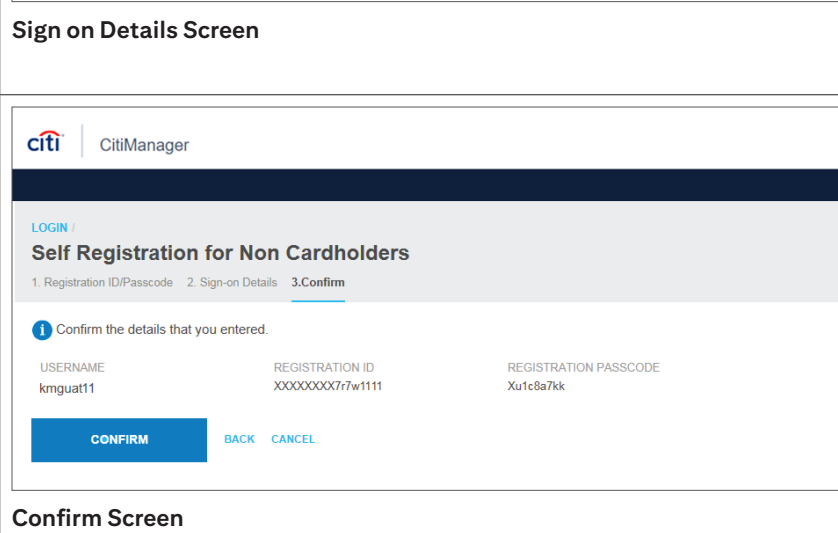
The Registration ID and Passcode can be re-sent by another Non-cardholder.

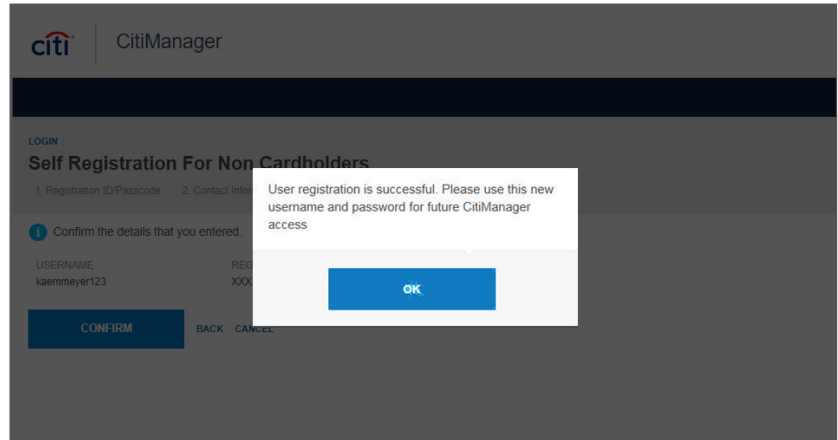
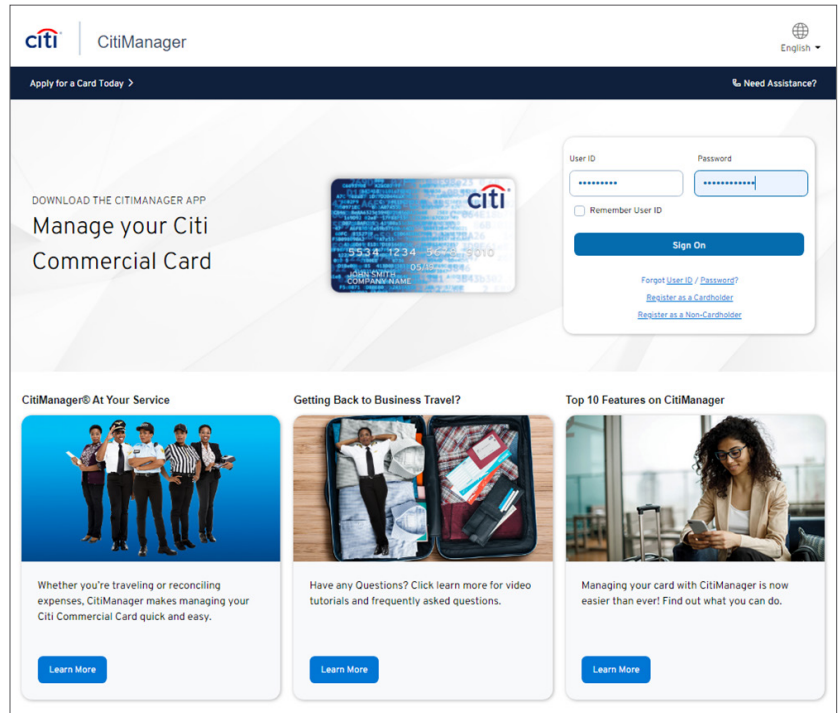
Step-By-Step Instructions

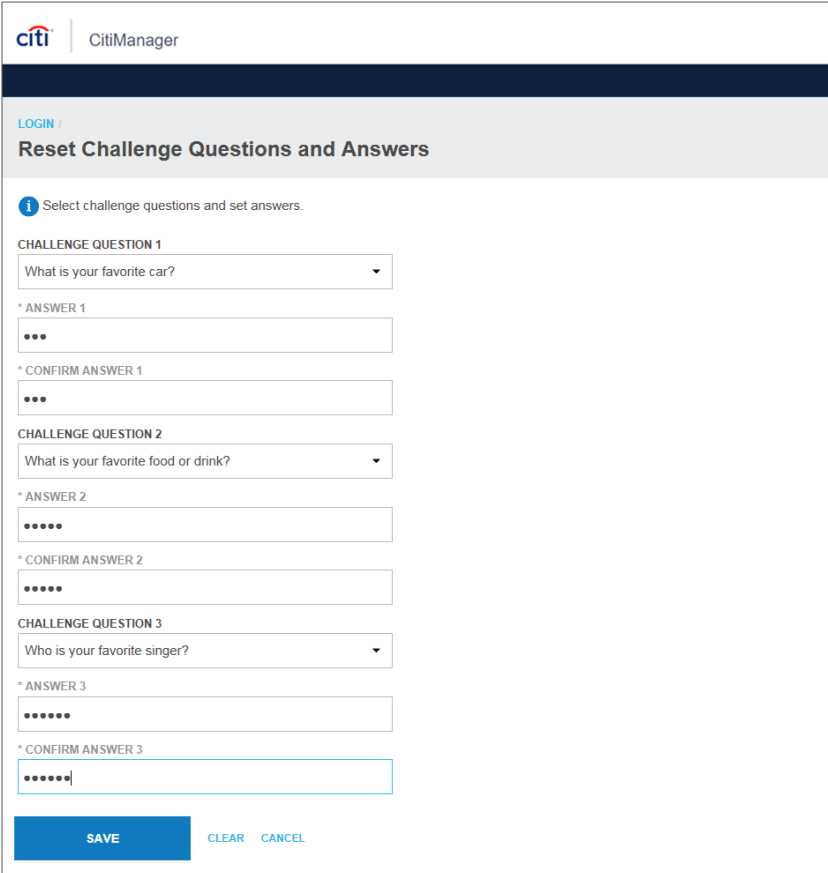
Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Login Screen. At the top, there is a Citi logo and the text 'CitiManager'. Below this, there is a 'Sign On' button. To the left of the button, there is a link for 'Register as a Non-Cardholder' highlighted with a yellow box. The page also includes promotional banners for the CitiManager app, business travel tips, and top 10 features.</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. Click the Register as a Non-Cardholder link. <i>The Registration ID/Passcode screen displays.</i>

CitiManager Site Login Screen

Screen	Step/Action
	<ol style="list-style-type: none"> In the Registration ID field, type the Registration ID supplied in the e-mail sent from the CitiManager Site. In the Registration Passcode field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site. Click the Continue button. <p><i>The Contact Information screen displays.</i></p>
<p>Registration ID/Passcode Screen</p> 	<ol style="list-style-type: none"> From the Country drop-down list select your country. From the Zip/Postal Code field, type your zip/postal code. Click the Continue button. <p><i>The Sign on Details screen displays.</i></p>
<p>Contact Information</p>	

Screen	Step/Action
	<p>9. In the Username field, type your desired username.</p> <p>Note: The username requirements display in a window as you type your username. A checkmark displays when each requirement is fulfilled.</p> <p>10. In the Password field, type and confirm a password that meets the requirements.</p> <p>Note: The password requirements display in a window as you type your password. A checkmark displays when each requirement is fulfilled.</p> <p>11. In the Confirm Password field, re-type the password.</p> <p>12. Verify the information in the Zip/Postal Code, Contact Number and User Profile Email Address fields and update if necessary.</p> <p>13. From the Helpdesk Verification Question drop-down list, select a question that will be used to verify your identity should you need to contact the helpdesk, reset your password or retrieve your username.</p> <p>14. From the Helpdesk Verification Answer field, type an answer to the Helpdesk verification question you selected.</p> <p>15. When you are finished, click the Continue button.</p>
<p>Sign on Details Screen</p>  <p>Confirm Screen</p>	<p>16. Review the details and click the Confirm button.</p> <p><i>A confirmation message displays indicating registration was successful and a confirmation e-mail is sent to the address entered during the registration process.</i></p>

Screen	Step/Action
	<p>17. Click the OK button.</p> <p><i>The CitiManager Site Login screen displays. When you log in for the first time, you will be prompted to select and answer three challenge questions.</i></p> <p>Note: As an extra security measure, each time you log in, you may be required to answer one of the challenge questions.</p>
<p>Confirmation Message</p> 	<p>18. Type your username and password and click the Sign On button.</p> <p><i>The Reset Challenge Questions and Answers screen displays.</i></p>

Screen	Step/Action
 <p>The screenshot shows the 'Reset Challenge Questions and Answers' screen in the CitiManager application. The header includes the Citi logo and 'CitiManager'. Below the header, there's a 'LOGIN /' link and the title 'Reset Challenge Questions and Answers'. A message icon indicates 'Select challenge questions and set answers.' The screen contains three challenge questions, each with a dropdown menu for selection and two text input fields for answers (one for the answer and one for confirmation). The questions are: 'What is your favorite car?', 'What is your favorite food or drink?', and 'Who is your favorite singer?'. At the bottom, there are three buttons: 'SAVE' (highlighted in blue), 'CLEAR', and 'CANCEL'.</p>	<p>19. Select and answer three challenge questions.</p> <p>Note: To confirm the challenge question answers, you will be asked to answer the questions twice during the set-up process.</p> <p>20. Click the Save button.</p> <p><i>The CitiManager Site Home screen displays.</i></p>

Log In to the CitiManager Site

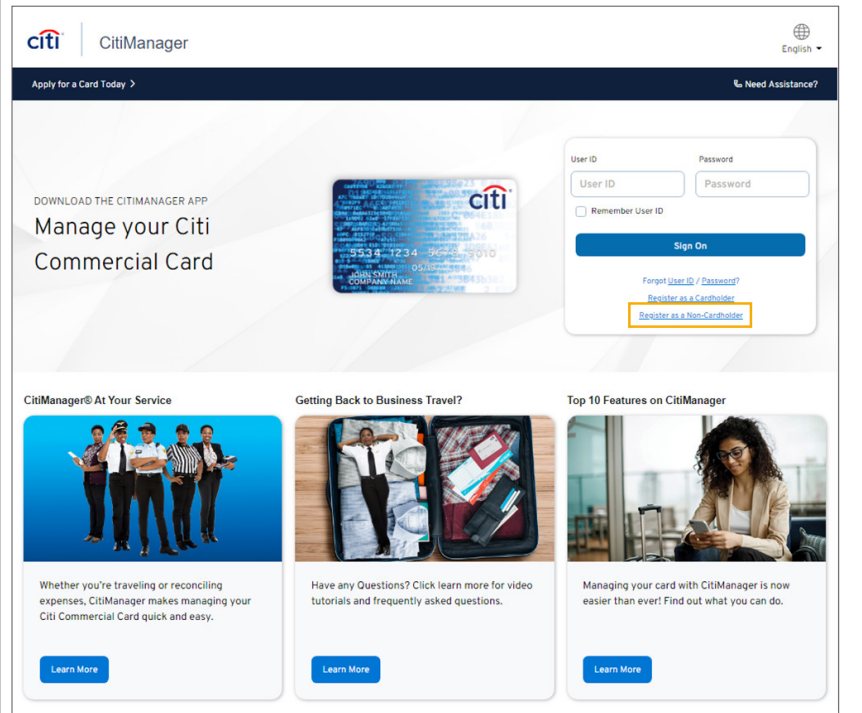
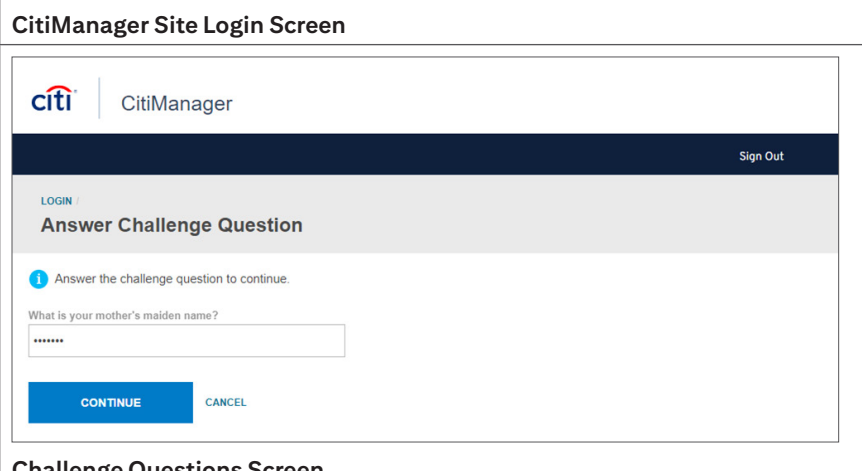
Key Concepts

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

As an additional layer of security, you may be required to enter a one-time passcode (OTP) during the log in process. If prompted, select a receipt option from the available options. The available options are based on your profile, and may include text message, call office or call mobile phone. Once you enter the OTP, the CitiManager Site **Home** screen displays and you will not need to answer a challenge question.

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

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager login page. At the top, there's a header with the Citi logo and 'CitiManager'. Below it, a dark blue bar contains 'Apply for a Card Today >' and 'Need Assistance?'. The main content area features a large graphic of a Citi Commercial Card and a login form. The form has fields for 'User ID' and 'Password', a 'Remember User ID' checkbox, and a 'Sign On' button. Below the form are links for 'Forgot User ID / Password?', 'Register as a Cardholder', and 'Register as a Non-Cardholder'. At the bottom, there are three promotional tiles: 'CitiManager® At Your Service', 'Getting Back to Business Travel?', and 'Top 10 Features on CitiManager', each with a 'Learn More' button.</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. In the User ID field, type your user ID. 3. In the Password field, type your password. 4. Click the Sign On button. <i>The Challenge Questions screen displays.</i> <p>Note: If the One-time Passcode receipt option screen displays, select how you would like to receive your one-time passcode and click the Continue button. When the eight-digit code is received, enter it on the One-time Passcode screen in the CitiManager Site and click the Continue button.</p>
 <p>The screenshot shows the 'Answer Challenge Question' screen. It has a header with the Citi logo and 'CitiManager'. Below it, a dark blue bar contains 'Sign Out'. The main content area has a 'LOGIN' section with the title 'Answer Challenge Question'. Below this, there's an information icon and the text 'Answer the challenge question to continue.' followed by the question 'What is your mother's maiden name?'. A text input field with masked characters is provided. At the bottom, there are 'CONTINUE' and 'CANCEL' buttons.</p>	<ol style="list-style-type: none"> 5. Answer the challenge question and click the Continue button. <i>The CitiManager Site Home screen displays.</i>

Retrieve Forgotten Username

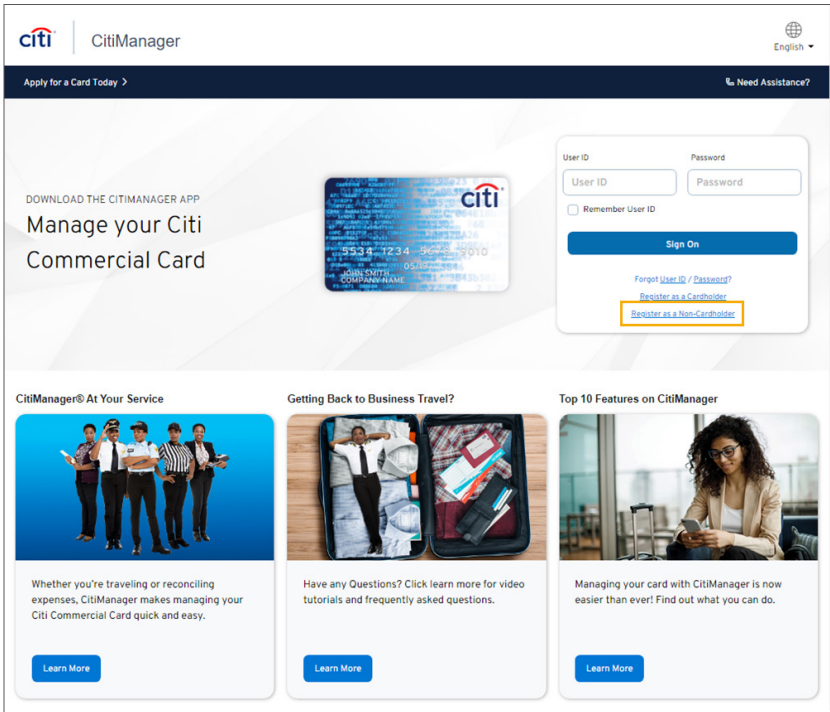
Key Concepts

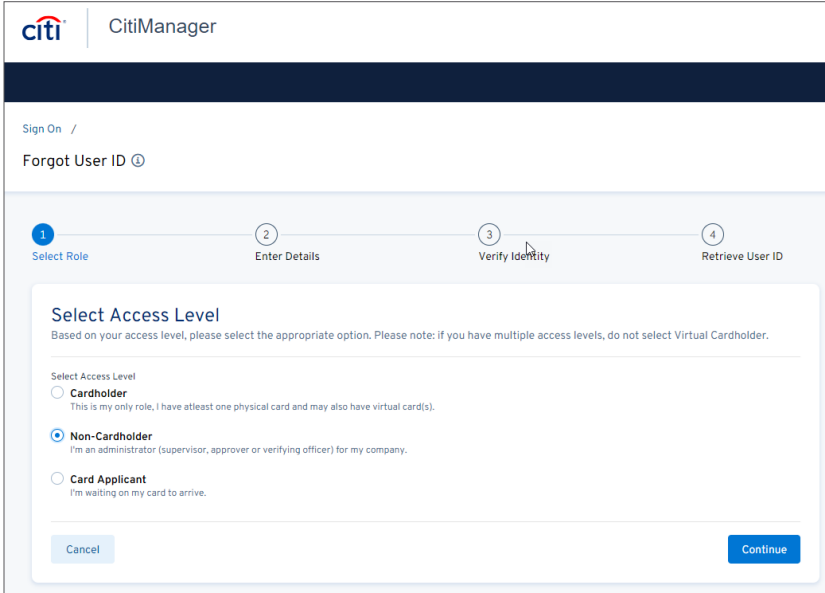
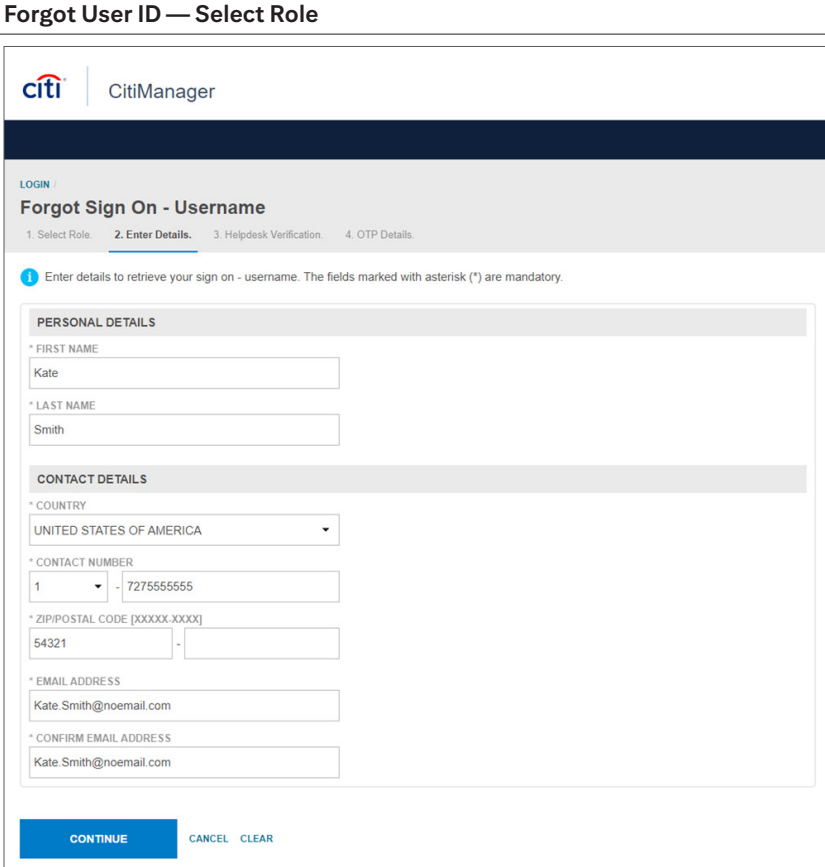
If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

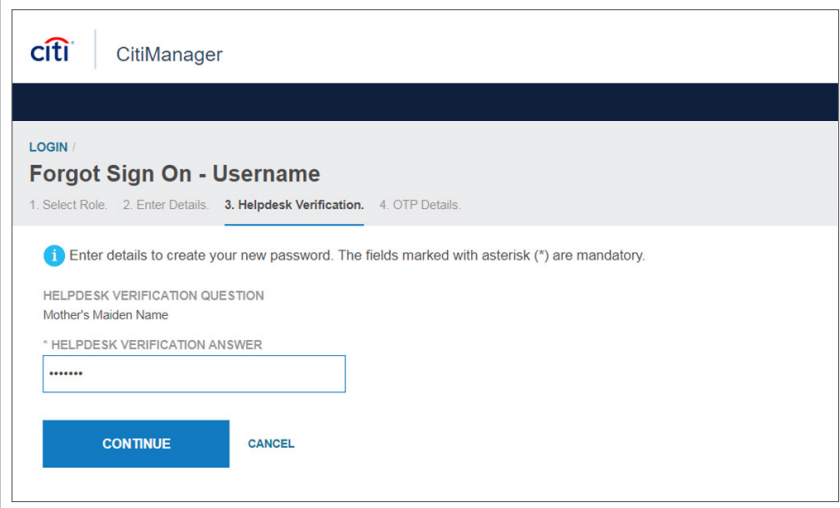
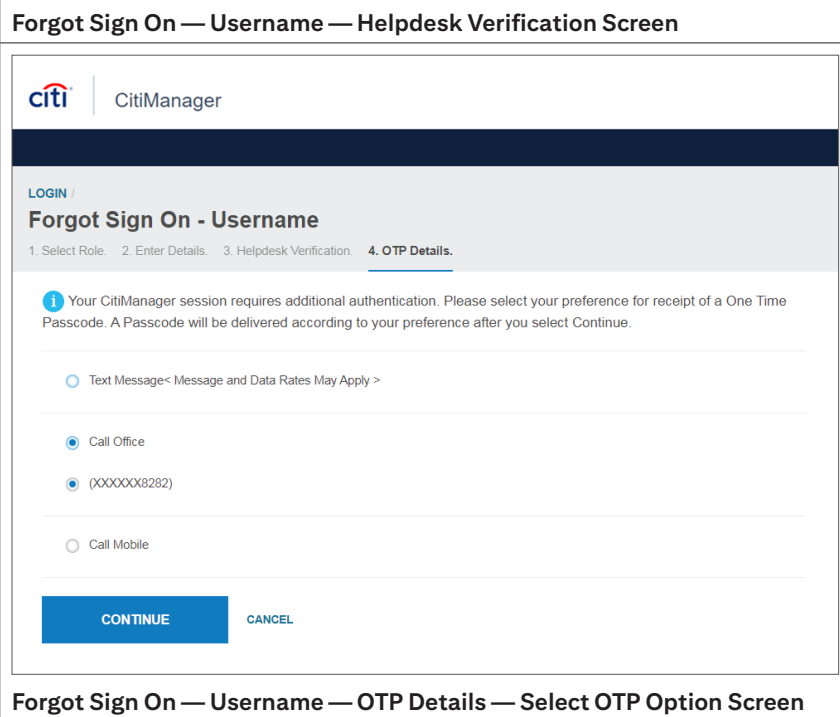
To retrieve your username, the following information is required:

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

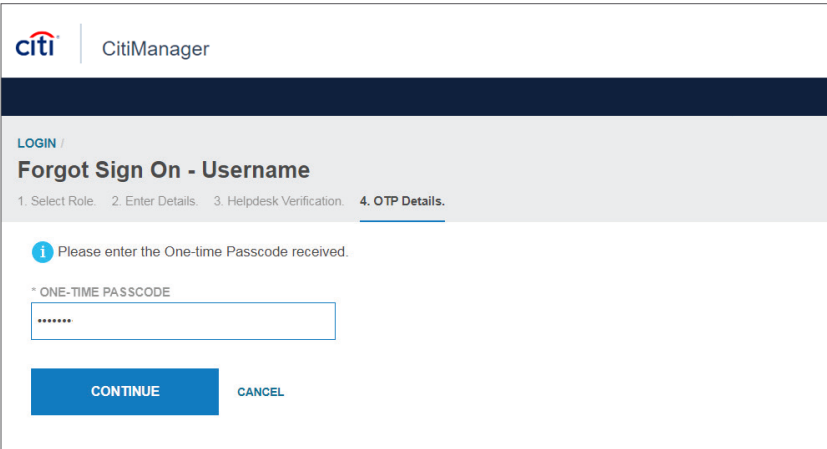
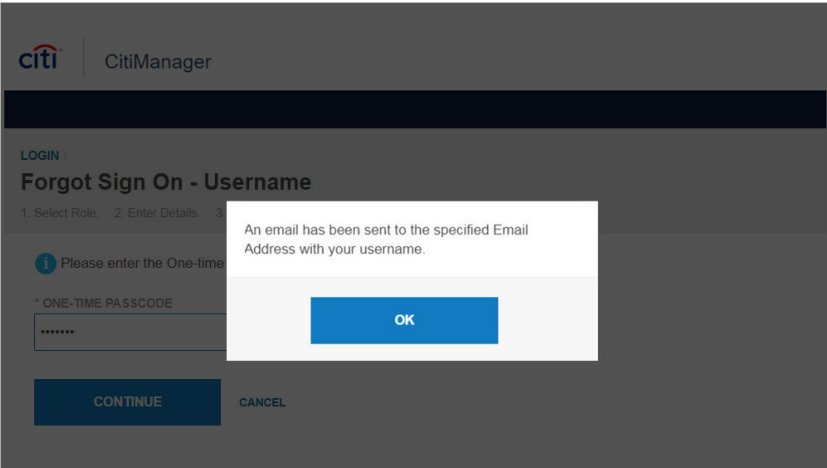
Step-By-Step Instructions

Screen	Step/Action
 <p>CitiManager Site Login Screen</p>	<ol style="list-style-type: none"> 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 Role displays.</i>

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

Screen	Step/Action
	<p>12. In the Helpdesk Verification Answer field, type the answer to the verification question and click the Continue button.</p> <p><i>The Forgot Sign On — Username — OTP Details — Select OTP Option screen displays.</i></p>
<p>Forgot Sign On — Username — Helpdesk Verification Screen</p>  <p>Forgot Sign On — Username — OTP Details — Select OTP Option Screen</p>	<p>13. Select the desired contact option and click the Continue button.</p> <p><i>A passcode is sent via text message or phone call depending on the option you selected.</i></p>



Screen	Step/Action
<div></div> <p>Forgot Sign On — Username — Enter OTP Screen</p>	<p>14. In the One-Time Passcode field, type the passcode you were provided and click the Continue button.</p> <p><i>A confirmation message displays indicating your username was sent to your e-mail address.</i></p>
<div></div> <p>Forgot Sign On — Username — Username Message Screen</p>	<p>15. Click the OK button</p> <p><i>The CitiManager Site Login screen displays.</i></p>

Reset Forgotten Password

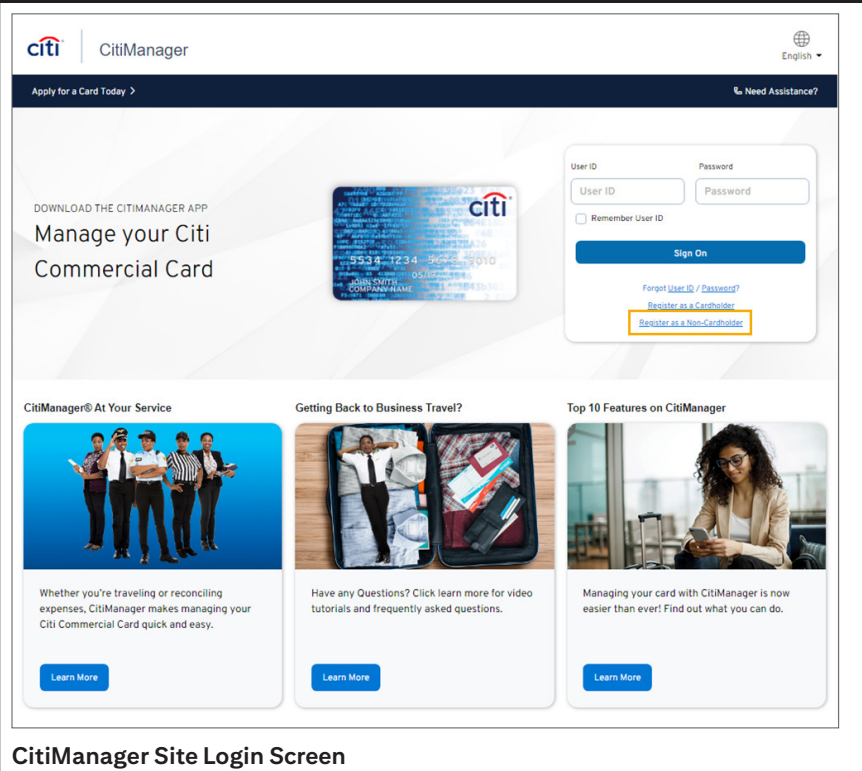
Key Concepts

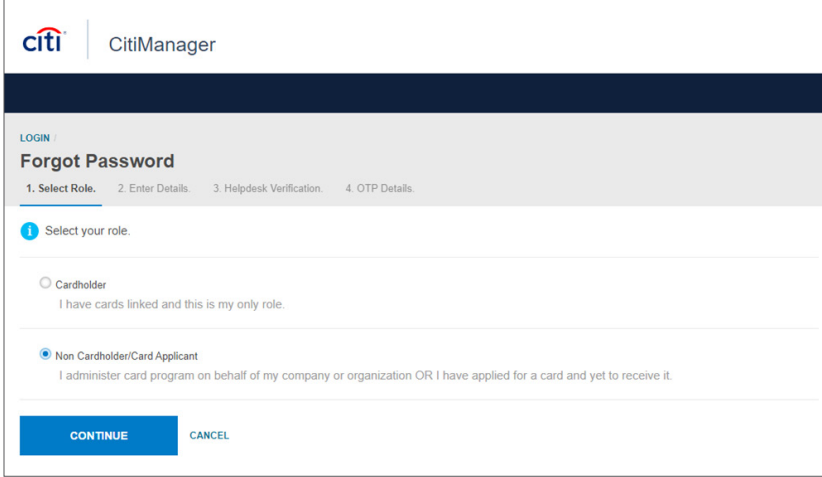
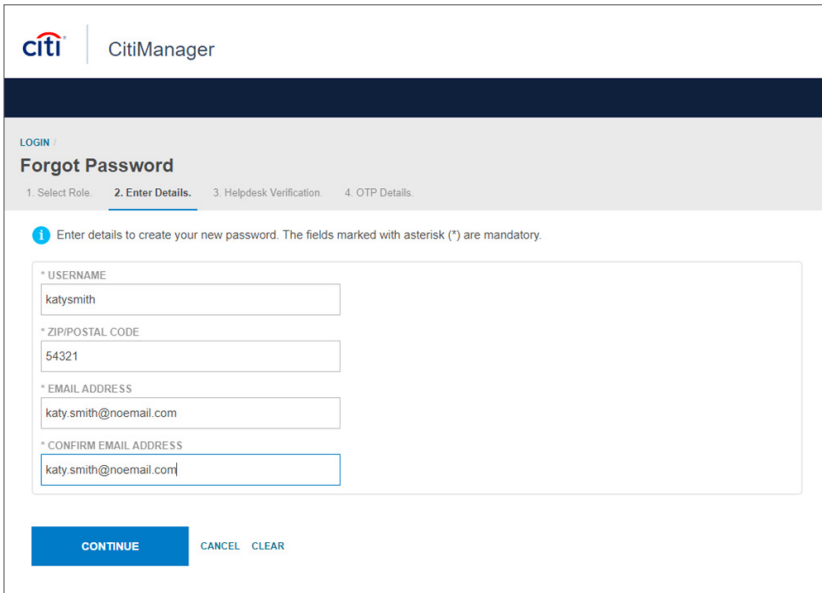
If you forget your password, you will need to reset it in order to sign in to the CitiManager Site.

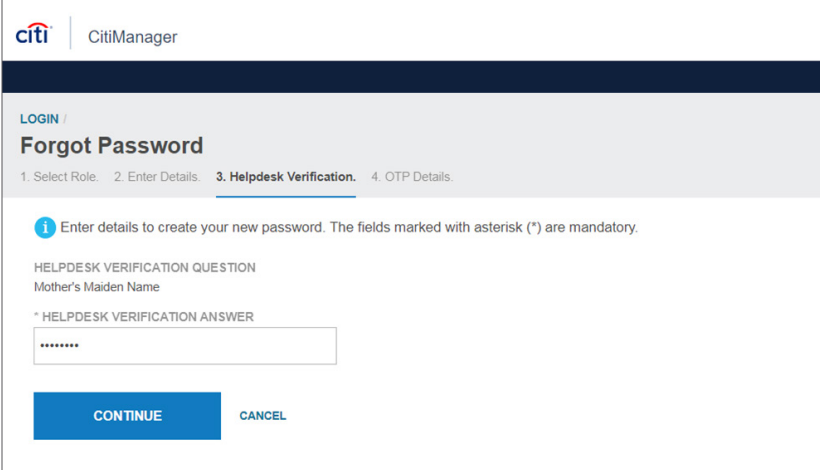
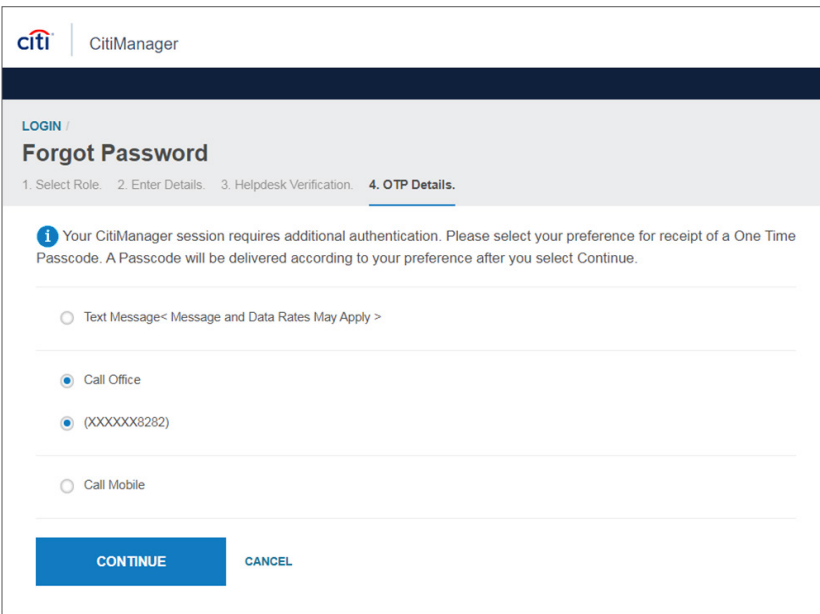
To reset your password, the following information is required:

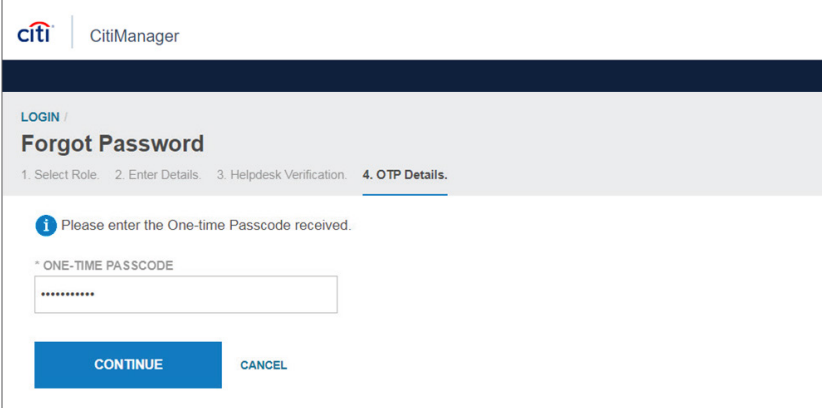
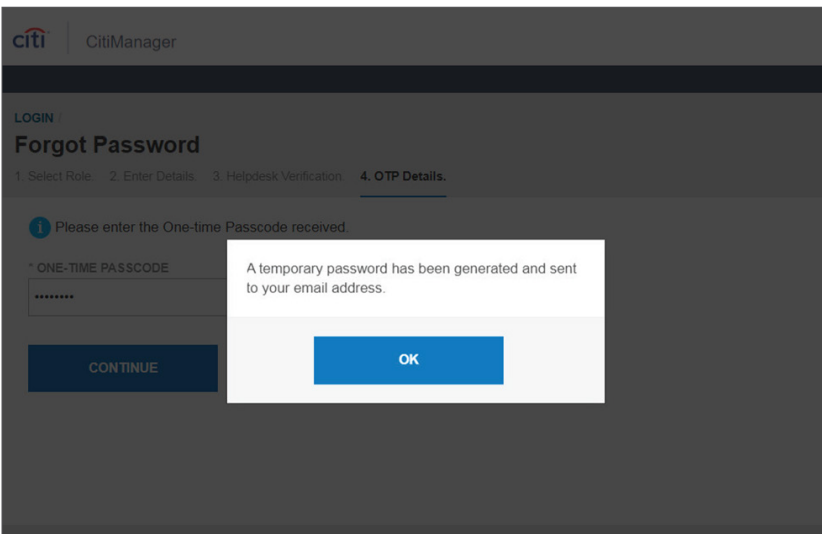
- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Login Screen. At the top, there's a header with the Citi logo and 'CitiManager'. Below that, there's a navigation bar with 'Apply for a Card Today >' and 'Need Assistance?'. The main content area features a large banner for 'Manage your Citi Commercial Card' with a Citi card image. To the right of the banner is a login form with fields for 'User ID' and 'Password', a 'Remember User ID' checkbox, and a 'Sign On' button. Below the login form, there's a link for 'Forgot User ID / Password?' and a link for 'Register as a Non-Cardholder' which is highlighted with a yellow box. At the bottom, there are three promotional tiles: 'CitiManager® At Your Service', 'Getting Back to Business Travel?', and 'Top 10 Features on CitiManager'.</p>	<ol style="list-style-type: none"> 1. Navigate to www.citimanager.com/login. <i>The CitiManager Site Login screen displays.</i> 2. Click the Forgot Password link. <i>The Forgot Password — Select Role screen displays.</i>

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

Screen	Step/Action
 <p>Forgot Password — Helpdesk Verification Screen</p>	<p>9. In the Helpdesk Verification Answer field, type the answer to the verification question.</p> <p>10. Click the Continue button.</p> <p><i>The Forgot Password — OTP Details — Select OTP Option screen displays.</i></p>
 <p>Forgot Password — OTP Details — Select OTP Option screen</p>	<p>11. Select the desired contact option and click the Continue button.</p> <p><i>A password is sent via text message or phone call depending on the option you selected.</i></p>

Screen	Step/Action
 <p>Forgot Password — Enter OTP Details Screen</p>	<p>12. In the One-Time Passcode field, type the passcode you were provided and click the Continue button.</p> <p><i>A confirmation message displays indicating a temporary password was sent to your e-mail address.</i></p>
 <p>Forgot Password — Temporary Password Message Screen</p>	<p>13. Click the OK button.</p> <p><i>The CitiManager Login screen displays. Log in to the CitiManager Site using your temporary password. You will be asked to reset your password once you log in.</i></p>

Search for a Cardholder and View Cardholder Details

Key Concepts

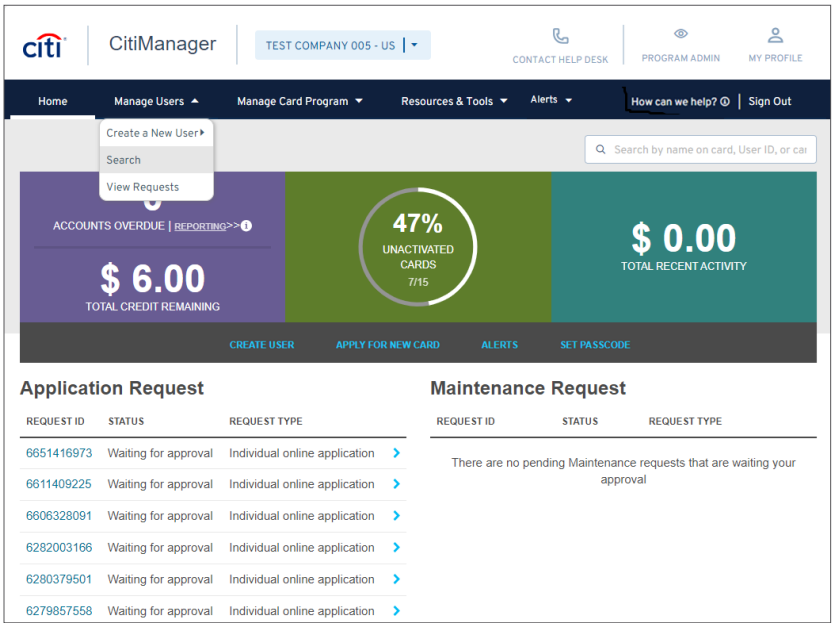
As a Program Administrator, you can search for Cardholders assigned to hierarchies within your span of control. Once you complete a search you may click the link from the **Username** column to access the following information on the **Cardholder Details** screen:

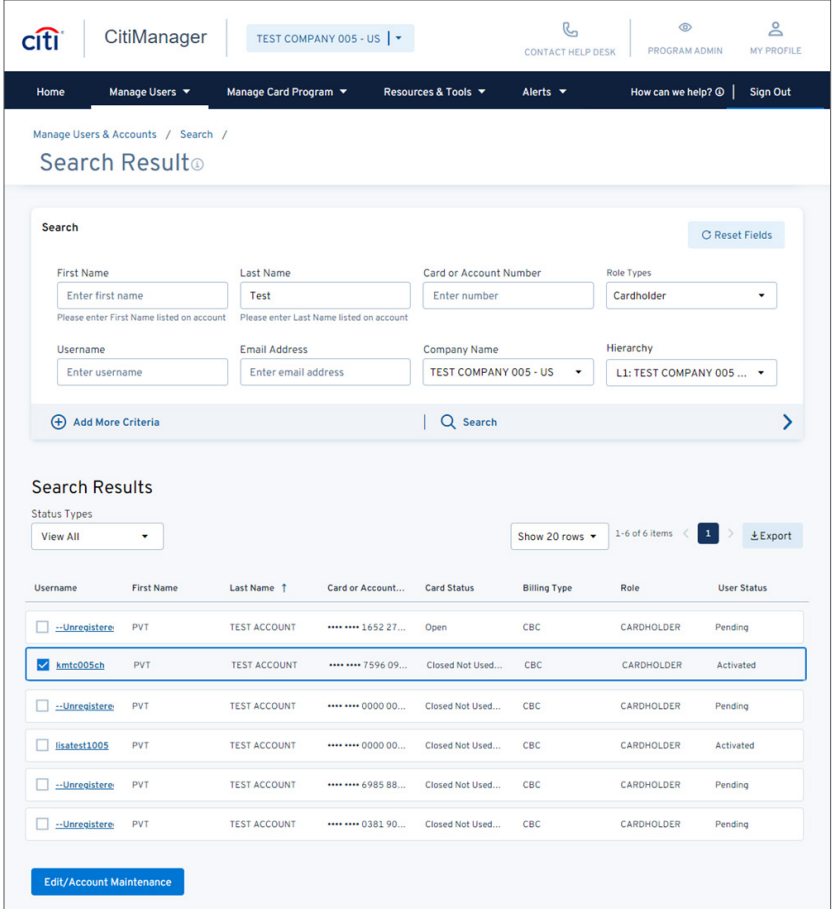
- Balance, credit limit and payment information
- Recent transactions and previous statements
- Aging of balance information
- Card contact information

The **Cardholder Details** screen is also a launching point if you want to perform account maintenance or perform other actions such as assign/unassign applications or companies, emulate a cardholder, replace a card, reset a password, reset registration details, update alerts, view account information, initiate/view a dispute if it was initiated online in the CitiManager Site and view entitlements or the hierarchy.

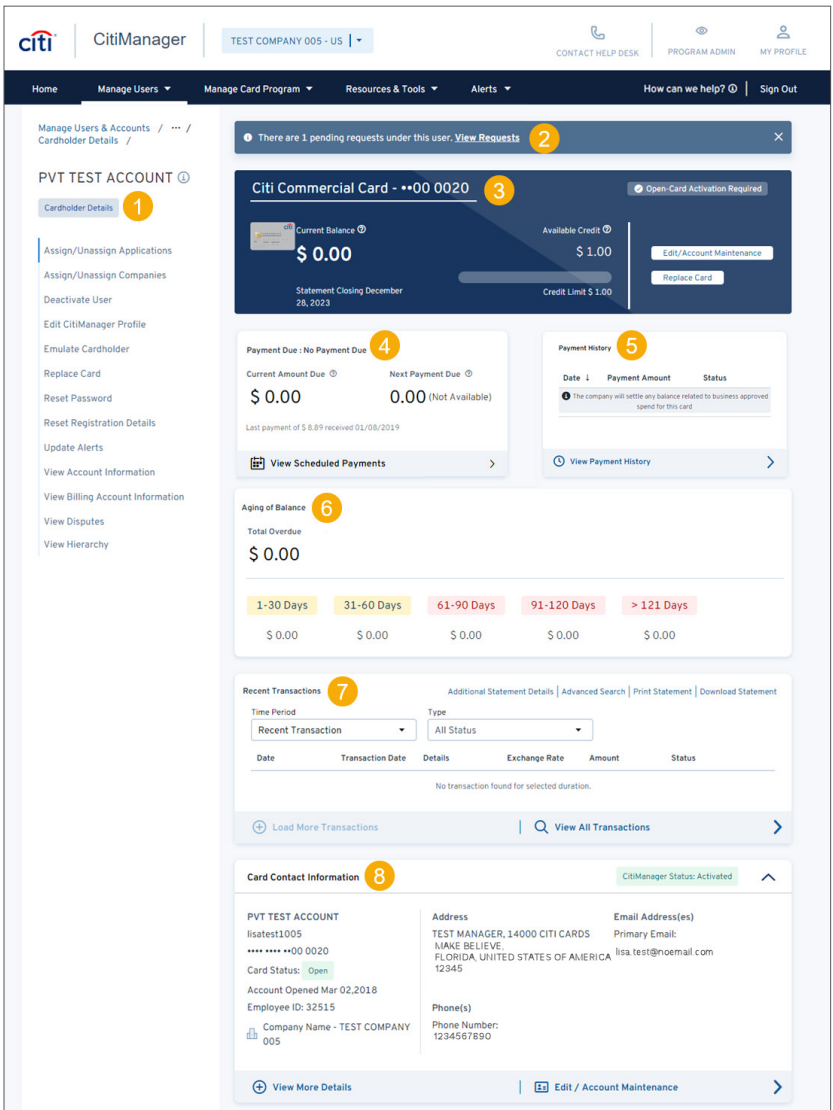
Step-By-Step Instructions

Search for Cardholder

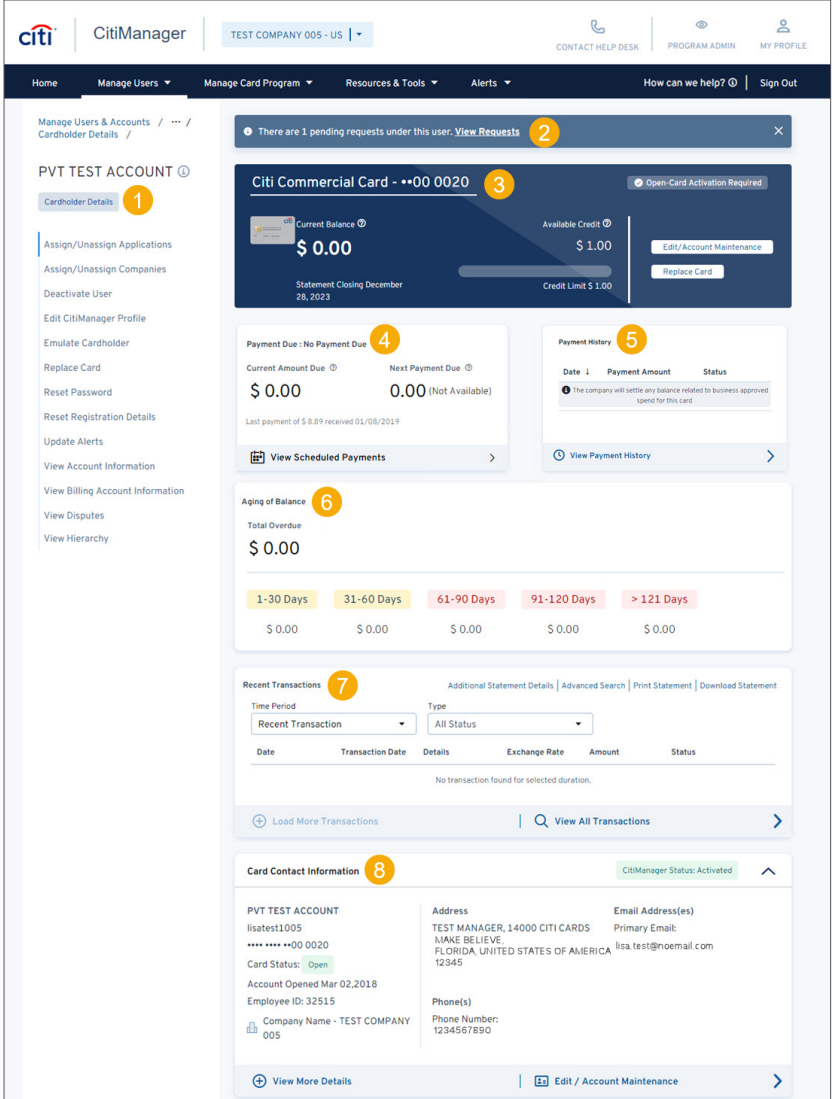
Screen	Step/Action
 <p>CitiManager Site Home Screen — Manage Users Menu</p>	<ol style="list-style-type: none"> 1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Search link. <i>The Search screen displays.</i>

Screen	Step/Action
<div>  <p>The screenshot shows the CitiManager 'Search Result' page. At the top, there's a navigation bar with 'Home', 'Manage Users', 'Manage Card Program', 'Resources & Tools', 'Alerts', 'How can we help?', and 'Sign Out'. Below this, the 'Search' section has several input fields: 'First Name' (placeholder: Enter first name), 'Last Name' (placeholder: Please enter Last Name listed on account, with 'Test' entered), 'Card or Account Number' (placeholder: Enter number), 'Role Types' (dropdown menu with 'Cardholder' selected), 'Username' (placeholder: Enter username), 'Email Address' (placeholder: Enter email address), 'Company Name' (dropdown menu with 'TEST COMPANY 005 - US' selected), and 'Hierarchy' (dropdown menu with 'L1: TEST COMPANY 005 ...' selected). There are 'Add More Criteria' and 'Search' buttons. Below the search section, the 'Search Results' section shows a table with columns: Username, First Name, Last Name, Card or Account..., Card Status, Billing Type, Role, and User Status. The table contains 6 rows of data. The second row is selected, showing details for user 'kmtc005ch'. At the bottom, there is an 'Edit/Account Maintenance' button.</p> </div>	<p>2. To perform a search, type the desired search criteria and click the Search link.</p> <p>Note: To search by Employee ID, Status Type or Billing Type, click the Add More Criteria link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>Note: To sort the results by a column, click the column header name. To filter your results by status types, use the Status Types field to select/deselect sort options.</p> <p>3. From the Username column, click the link for the card account you wish to view.</p> <p><i>The Cardholder Details screen displays the card overview including current balance, available credit, credit limit, payment history, aging of balance, recent transactions, previous statements, transaction details and card contact information.</i></p> <p>Note: To perform a new search or return to your search results, from the breadcrumbs that display on top-left of the screen, position your mouse over the ellipsis (...) and click either Search or Search Results.</p>

Cardholder Details Screen Overview

Screen	Step/Action
	<ol style="list-style-type: none"> Links displayed on the left-side of the screen can be used to perform additional actions on the card account. The links displayed are based on your entitlements and company set-up. If the account has pending application and maintenance requests or the Cardholder has not yet registered for the CitiManager Site, a message displays at the top of the screen and you can click the link to view the requests or resend the registration details. In the card information section, the card number, card status, the current balance, available credit, statement closing date and credit limit display. If you have additional card accounts, a drop-down arrow displays, and you can select another account to view. The account status displays in the top-right of the sections. You can click the Edit/Account Maintenance or Replace Card buttons to perform account maintenance or initiate a card replacement. In the Payment Due section, the current amount due, the next payment due and last payment received display. Click the View Scheduled Payment link to display any scheduled payment information such as amount, date, bank routing number, bank name, bank account number and type and the status of the payment. In the Payment History section, the date, payment amount and status of the payment display. Click the View Payment History link to display payment information such as amount, date, bank routing number, bank name, bank account number and type and the status of the payment.

Cardholder Details Screen

Screen	Step/Action
	<p>6. In the Aging of Balance section, the total past due and days past due (1-120) display.</p> <p>7. In the Recent Transactions/Statements section, you can view recent or billed transactions. You can select a statement date from the Time Period drop-down list. You can also click the links on the top-right of the section to view additional statement details, perform an advanced search, print a statement or download a statement. From the bottom of the section, you can click the Load More Transactions link to display additional transactions. Ten transactions display by default and ten additional will display if you load more transactions. You can click the View All Transaction link to view all transactions or search for a transaction.</p> <p>8. The Card Contact Information section displays the account name, the address and contact information, the account status and company name. From the bottom of the section, you can click the View More Details link to display additional contact information or click the Edit/Account Maintenance link to perform account maintenance.</p>

Cardholder Details Screen

Search for Non-cardholders and View User Account Information

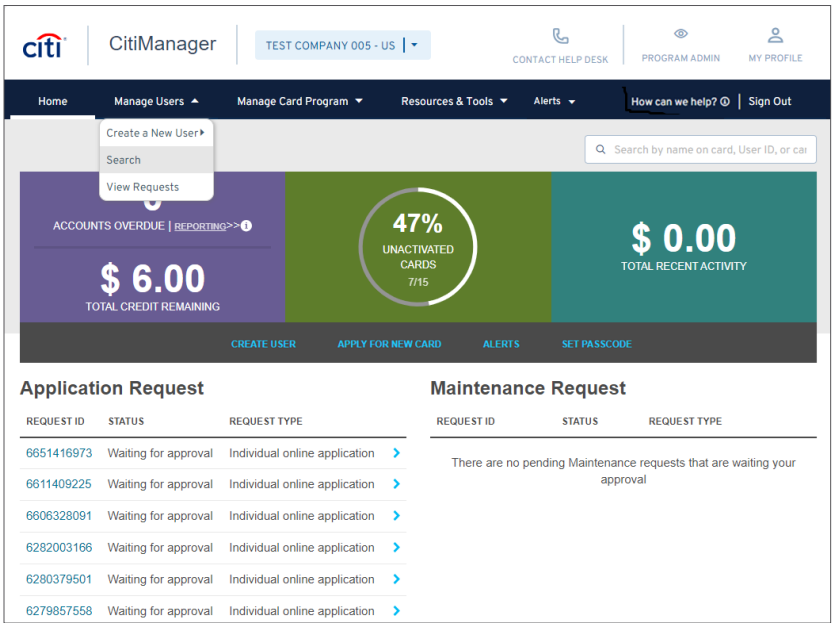
Key Concepts

You can search for a Non-cardholder and view their user account information. Once the search is complete, you may view account information including their:

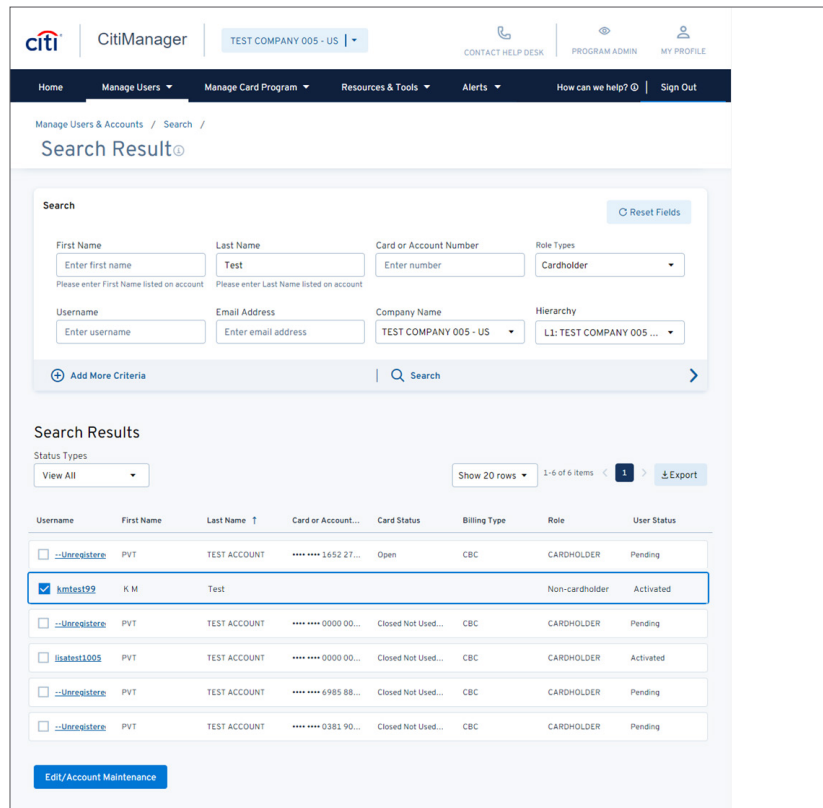
- CitiManager Status
- Company Name
- Address
- E-mail Address
- Phone Number
- Role
- Entitlements

Step-By-Step Instructions

Search for Non-cardholder

Screen	Step/Action
 <p>CitiManager Site Home Screen — Manage Users Menu</p>	<ol style="list-style-type: none"> From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Search link. <i>The Search screen displays.</i>

Screen



Search Results

Status Types: View All Show 20 rows 1-6 of 6 items Export

Username	First Name	Last Name	Card or Account...	Card Status	Billing Type	Role	User Status
--Unregister	PVT	TEST ACCOUNT	.....1652 27...	Open	CBC	CARDHOLDER	Pending
<input checked="" type="checkbox"/> kmtst192	K M	Test				Non-cardholder	Activated
--Unregister	PVT	TEST ACCOUNT	.....0000 00...	Closed Not Used...	CBC	CARDHOLDER	Pending
--Unregister	PVT	TEST ACCOUNT	.....0000 00...	Closed Not Used...	CBC	CARDHOLDER	Activated
--Unregister	PVT	TEST ACCOUNT	.....6985 88...	Closed Not Used...	CBC	CARDHOLDER	Pending
--Unregister	PVT	TEST ACCOUNT	.....0381 90...	Closed Not Used...	CBC	CARDHOLDER	Pending

[Edit/Account Maintenance](#)

Search Screen

Step/Action

2. To perform a search, type the desired search criteria and click the **Search** link.

Note: To search by **Employee ID**, **Status Type** or **Billing Type**, click the **Add More Criteria** link.

The search results display at the bottom of the screen.

Note: To sort the results by a column, click the column header name. To filter your results by status types, use the **Status Types** field to select/deselect sort options. To sort the results by the Non-cardholder role, select **Non-cardholder** from the **Role Types** drop-down list.

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

The Non-Cardholders Details — User Account Information screen displays the user status, name, company, address, e-mail address, phone number, role, and entitlements

Note: To perform a new search or return to your search results, from the breadcrumbs that display on top-left of the screen, position your mouse over the **ellipsis (...)** and click either **Search** or **Search Results**.

Non-cardholder Details Screen Overview

Screen	Step/Action
<p>Non-cardholder Details Screen</p>	<ol style="list-style-type: none"> Links displayed on the left-side of the screen can be used to perform additional actions on the account. A message and links will display at the top of the screen if the account has been inactivated or if the user has not registered in the CitiManager Site. If the account has been inactivated, you can click the Activate User link to activate the user. If the user has not registered in the CitiManager Site, the Resend Registration Details link displays. In the User Account Information section, the account status, account name, company, address and contact information display. To view the companies you have in common with the Non-cardholder, click the View Shared Companies button. To edit the user's CitiManager profile, including personal details, contact details, roles, hierarchy, and entitlements, click the Edit CitiManager Profile link. In the Entitlements section, the entitlements and role assigned to the Non-cardholder display.

View Statements and Recent Transactions

Key Concepts

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

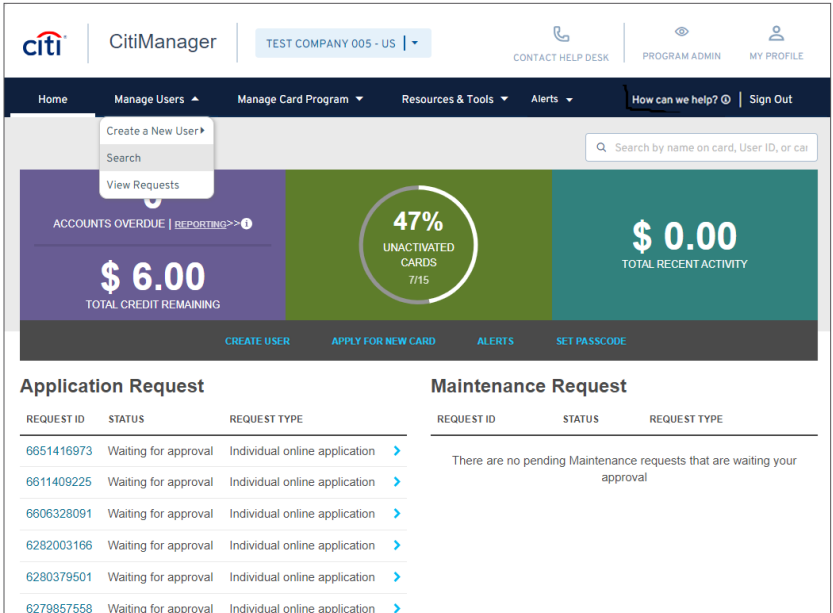
The **Recent Activity/Statements** section of the **Cardholder Details** screen displays the posting date, transaction date, transaction details, exchange rate, amount and status of recent transactions. You can expand each transaction to view additional detail that may have been sent to Citi from a merchant. Transaction detail includes the original currency amount, currency exchange rate and the conversion amount that was posted and may include items such as airline name, ticket and flight number.

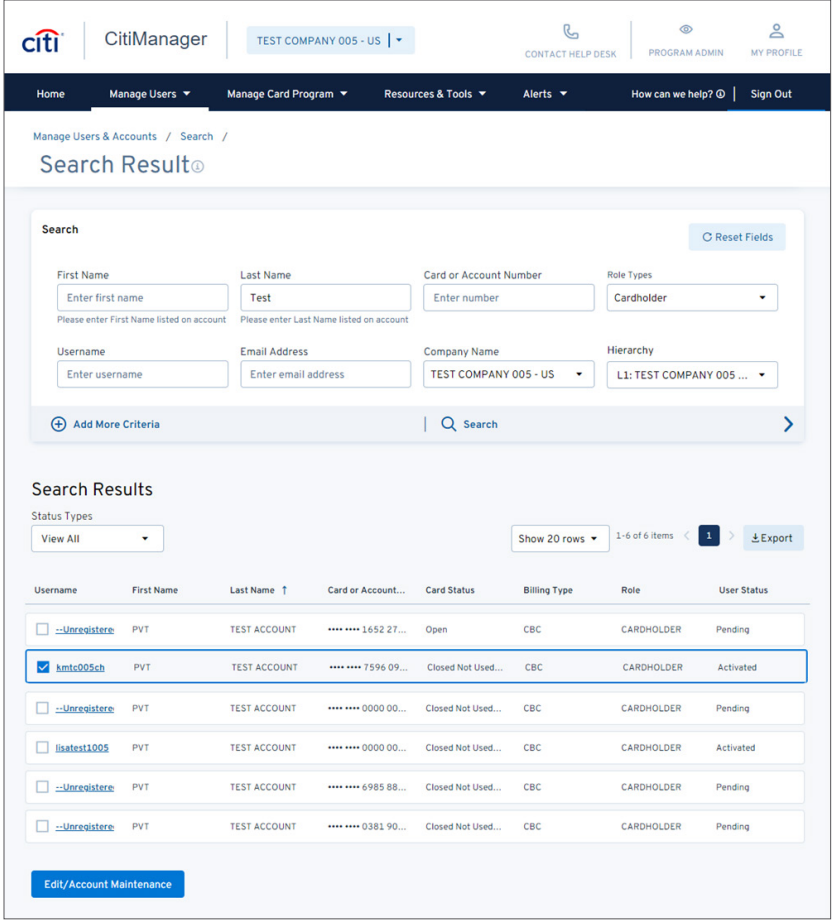
Additionally, you can initiate a dispute if the transaction meets the requirements.

You can also perform an advanced search of billed transactions by status type, a specific date, a date range, description or amount.

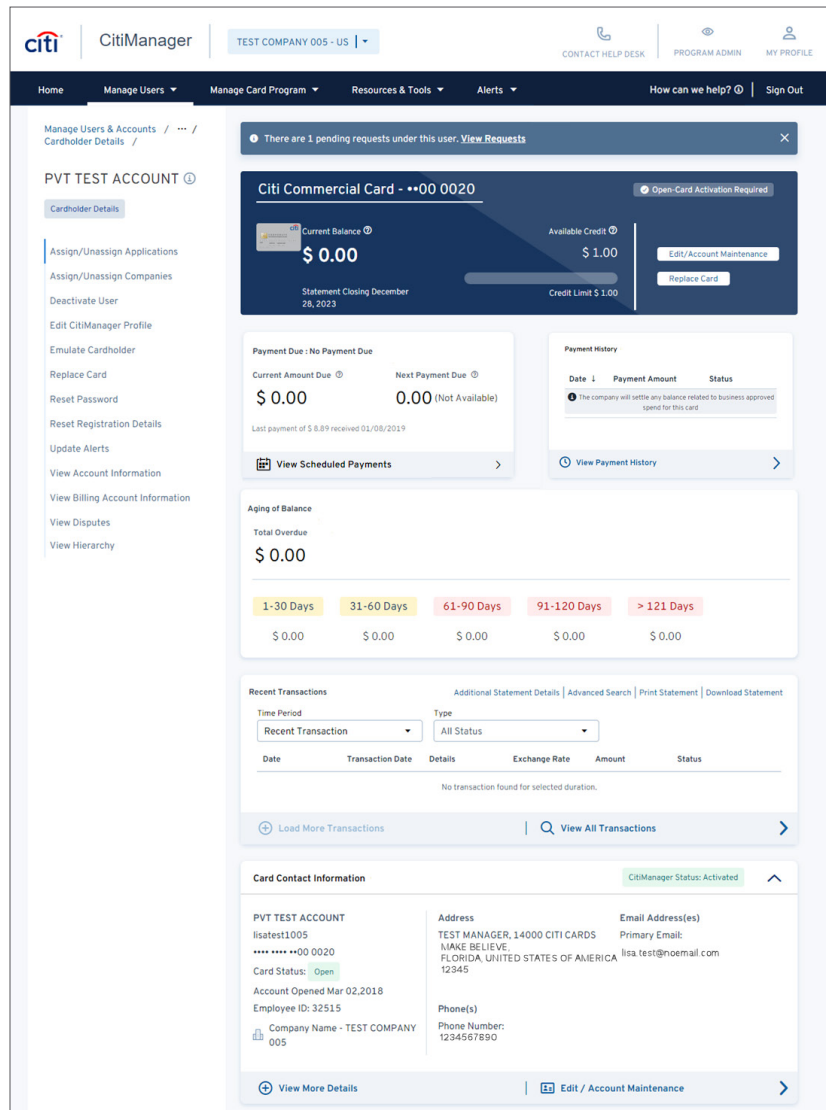
You can download and print transactions for individually or centrally billed accounts. If you wish to print recent transactions, it's recommended you download the transactions in Excel format. After you open the downloaded file, you can print it by selecting **Print** from the **File** menu.

Step-By-Step Instructions

Screen	Step/Action
 <p>CitiManager Site Home Screen — Manage Users Menu</p>	<ol style="list-style-type: none"> From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Search link. <i>The Search screen displays.</i>

Screen	Step/Action
<div>  <p>The screenshot shows the CitiManager 'Search Result' page. At the top, there's a navigation bar with 'Home', 'Manage Users', 'Manage Card Program', 'Resources & Tools', 'Alerts', and 'Sign Out'. Below this is a search bar with fields for First Name, Last Name (containing 'Test'), Card or Account Number, Role Types (set to 'Cardholder'), Username, Email Address, Company Name (set to 'TEST COMPANY 005 - US'), and Hierarchy (set to 'L1: TEST COMPANY 005 ...'). A 'Search' button is at the bottom right of the search bar. Below the search bar, the 'Search Results' section shows a table with columns: Username, First Name, Last Name, Card or Account..., Card Status, Billing Type, Role, and User Status. The table contains 6 rows. The second row, with Username 'hmtc005ch', is highlighted. Below the table is an 'Edit/Account Maintenance' button.</p> </div>	<p>2. To perform a search, type the desired search criteria and click the Search link.</p> <p>Note: To search by Employee ID, Status Type or Billing Type, click the Add More Criteria link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>Note: To sort the results by a column, click the column header name. To filter your results by status types, use the Status Types field to select/deselect sort options.</p> <p>3. From the Username column, click the link for the Cardholder account you wish to view.</p> <p><i>The Cardholder Details screen displays.</i></p>

Screen



Cardholder Details Screen

Manage Users & Accounts / ... / Cardholder Details /

PVT TEST ACCOUNT

Cardholder Details

- Assign/Unassign Applications
- Assign/Unassign Companies
- Deactivate User
- Edit CitiManager Profile
- Emulate Cardholder
- Replace Card
- Reset Password
- Reset Registration Details
- Update Alerts
- View Account Information
- View Billing Account Information
- View Disputes
- View Hierarchy

There are 1 pending requests under this user. [View Requests](#)

Citi Commercial Card - **00 0020 Open-Card Activation Required

Current Balance **\$ 0.00** Available Credit **\$ 1.00** Edit/Account Maintenance

Statement Closing December 28, 2023 Credit Limit \$ 1.00 Replace Card

Payment Due : No Payment Due

Current Amount Due **\$ 0.00** Next Payment Due **0.00 (Not Available)**

Last payment of \$ 8.89 received 01/08/2019

[View Scheduled Payments](#)

Payment History

Date	Payment Amount	Status
The company will settle any balance related to business approved spend for this card.		

[View Payment History](#)

Aging of Balance

Total Overdue **\$ 0.00**

1-30 Days	31-60 Days	61-90 Days	91-120 Days	> 121 Days
\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Recent Transactions Additional Statement Details | Advanced Search | Print Statement | Download Statement

Time Period: **Recent Transaction** Type: **All Status**

Date	Transaction Date	Details	Exchange Rate	Amount	Status
No transaction found for selected duration.					

[Load More Transactions](#) [View All Transactions](#)

Card Contact Information CitiManager Status: Activated

PVT TEST ACCOUNT
lisatest1005
**** **00 0020
Card Status: **Open**
Account Opened Mar 02, 2018
Employee ID: 32515

Address
TEST MANAGER, 14000 CITI CARDS
MAKE BELIEVE
FLORIDA, UNITED STATES OF AMERICA 12345

Email Address(es)
Primary Email: lisa.test@noemail.com

Phone(s)
Phone Number: 1234567890

[View More Details](#) [Edit / Account Maintenance](#)

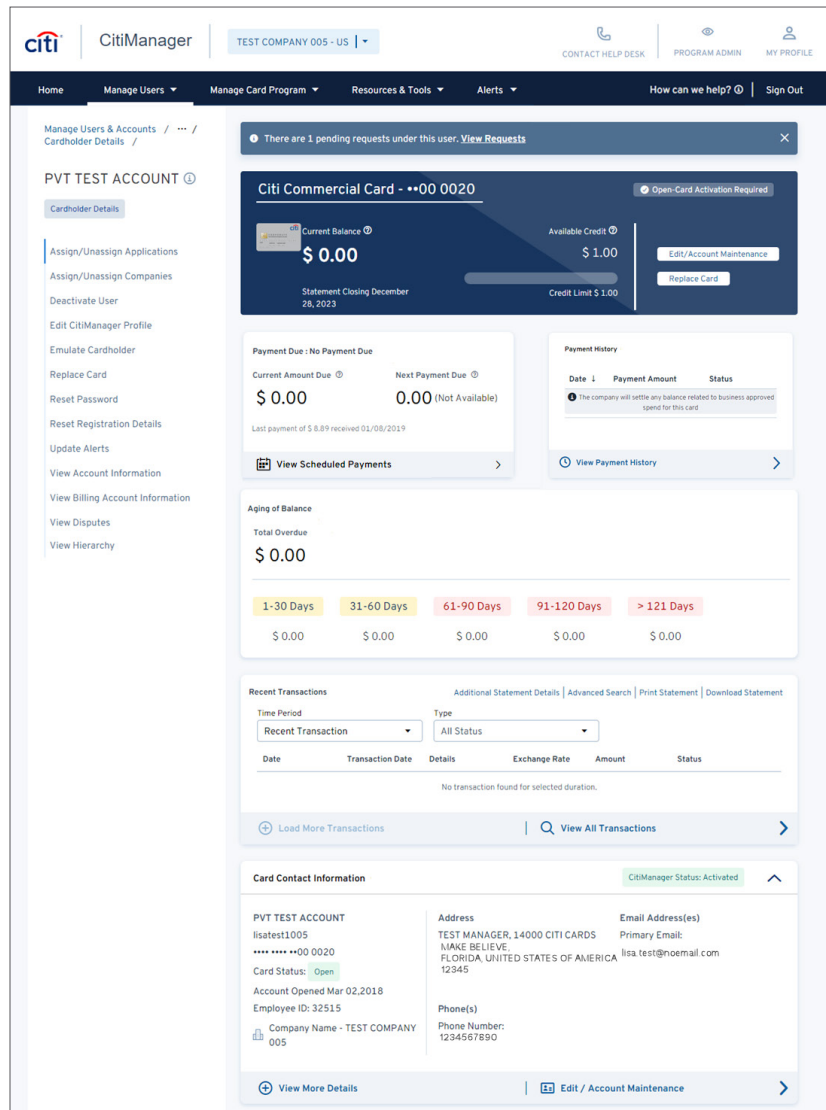
Cardholder Details Screen

Step/Action

- From the **Recent Transactions/Statements** section, select the statement date from the **Time Period** drop-down list. Ten transactions display by default. The transaction post date, transaction date, transaction details, exchange rate, transaction amount and status display.
 - To view ten additional transactions on the **Cardholder Details** screen, click the **Load More Transactions** link. To view all transactions, click the **View All Transactions** link.
 - To expand the transaction and view additional transaction information, click the arrow link on the right-side of the transaction.
 - To view authorizations/declines, view the transaction status in the **Status** column (Posted, Pending, Declined, Diverted).
 - To view additional information about a transaction and a decline reason, click the arrow link on the right-side of the transaction to expand it. Once the transaction is expanded, you can also click the **View More Details** button.
 - To view a snapshot of additional account details, credit limits, balance and payment details, click the **Additional Statement Details** link.
 - To perform an advanced search, click the **Advanced Search** link. From the **Advanced Search** screen, you can filter by status type, or a date range or search by a date, description or amount.

Note: By default, the **Time Period** and **Search** fields are not available for input. To activate the fields, click the **Hide Advanced Search** link. To filter by **Date Range** or **Amount Range**, click the **Advanced Search** link to display these field.

Screen



Cardholder Details

Assign/Unassign Applications
Assign/Unassign Companies
Deactivate User
Edit CitiManager Profile
Emulate Cardholder
Replace Card
Reset Password
Reset Registration Details
Update Alerts
View Account Information
View Billing Account Information
View Disputes
View Hierarchy

PVT TEST ACCOUNT

There are 1 pending requests under this user. [View Requests](#)

Citi Commercial Card - **00 0020

Current Balance: \$ 0.00
Available Credit: \$ 1.00
Statement Closing December 28, 2023
Credit Limit \$ 1.00

Payment Due: No Payment Due
Current Amount Due: \$ 0.00
Next Payment Due: 0.00 (Not Available)
Last payment of \$ 8.89 received 01/08/2019

Payment History

Date	Payment Amount	Status
The company will settle any balance related to business approved spend for this card.		

Aging of Balance

1-30 Days	31-60 Days	61-90 Days	91-120 Days	> 121 Days
\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Recent Transactions

Time Period: Recent Transaction | Type: All Status

Date	Transaction Date	Details	Exchange Rate	Amount	Status
No transaction found for selected duration.					

Card Contact Information

PVT TEST ACCOUNT
lisatest1005
**** **00 0020
Card Status: Open
Account Opened Mar 02, 2018
Employee ID: 32515
Company Name - TEST COMPANY 005

Address
TEST MANAGER, 14000 CITI CARDS
MAKE BELIEVE
FLORIDA, UNITED STATES OF AMERICA 12345

Email Address(es)
Primary Email:
lisa.test@noemail.com

Phone(s)
Phone Number:
1234567890

Cardholder Details Screen

Step/Action

- To download statements in either Comma Separated Value (CSV), Portable Document Format (PDF) or Excel (EXL) format, click the **Download Statement** link and select the desired option. If you intend to print the statement, PDF is the recommended format. To print, you can open downloaded file and select **Print** from the **File** menu.

Note: A request needs to be submitted to download statements that are three years or older. When you click on the statement date icon, a download request window displays. Click **Yes**, to confirm the request. After 24 hours, return to the **Cardholder Details** 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.

- To initiate a dispute online, either select the checkbox for the transaction(s) and then click the **Dispute Charges** link or when the transactions is expanded, click the **Dispute Transaction** button.
- To view/attach/delete transaction documents, click the arrow link on the right-side of the transaction to expand it and then click the **Upload Receipt File** button.

Perform Account Maintenance

Key Concepts

Account Maintenance allows Non-cardholders to update Cardholder account information such as address, Employee ID, credit limit, temporary spend controls, account status and Merchant Category Code Groups (MCCGs). For individuality billed accounts, a Non-cardholder is not permitted to perform account maintenance on their own account.

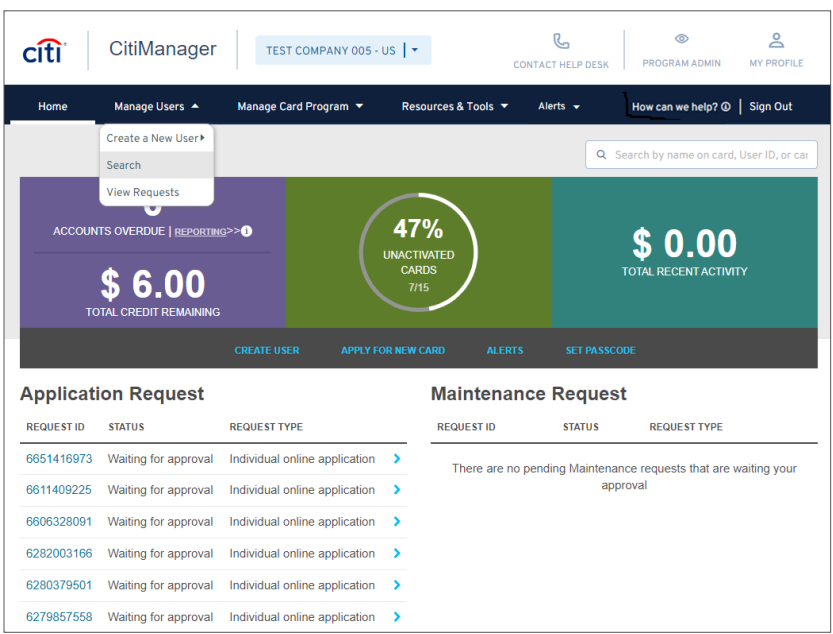
You can close an account by selecting the appropriate account status from the **Spending Control** or **Cardholder-Demographics** section based on your company setup.

Examples of closed options include:

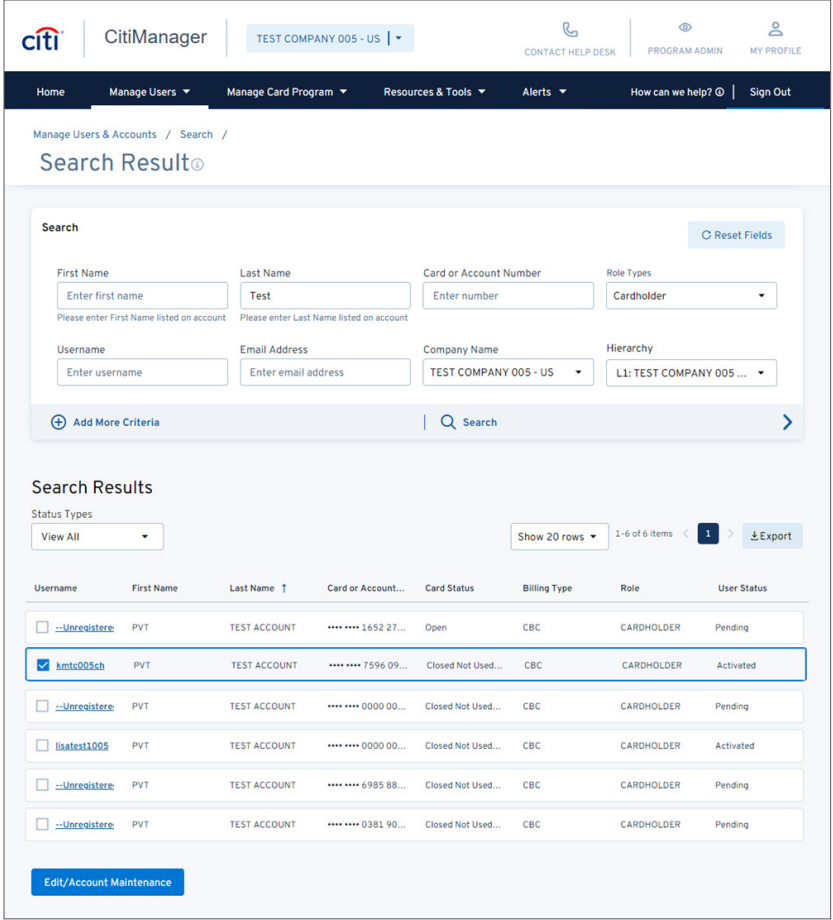
Account Status in CitiManager	Account Status Code	Account Reason Code
Closed	CL	V9
Closed Deceased	CL	DC
Closed Not Used/Inactivity	CL	DU
Closed Misuse	CL	V4
Closed Temporary Block	CL	V3
Closed No Longer Employed	CL	TE
Closed Too Many Cards/Duplicate	CL	TC

The Closed Temporary Block status is equivalent to Deactivate. The only closed status that cannot be reopened in the CitiManager Site is Closed Deceased.

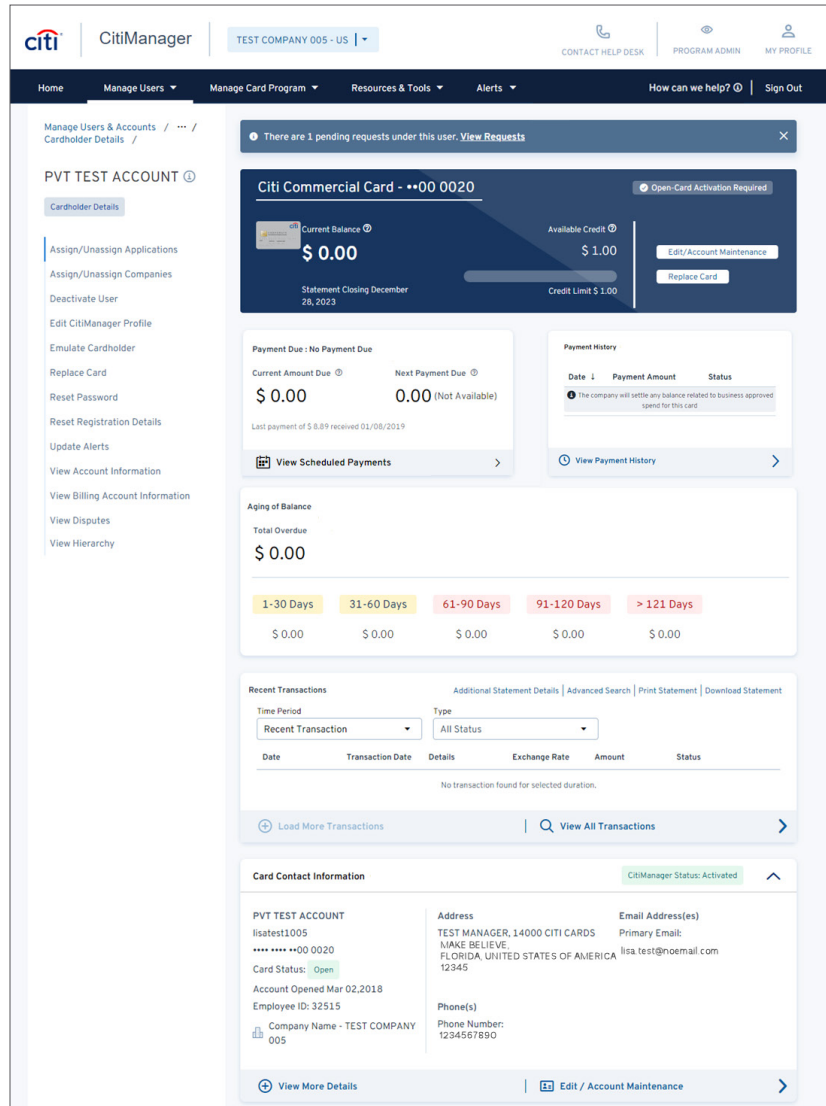
Step-by-Step Instructions

Screen	Step/Action
	<ol style="list-style-type: none"> From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Search link. <p>Note: You can also click the Edit/Account Maintenance link from the Cardholder Details screen.</p> <p><i>The Search screen displays.</i></p>

CitiManager Site Home Screen — Manage Users Menu

Screen	Step/Action
 <p>Search Screen</p>	<p>2. To perform a search, type the desired search criteria and click the Search link.</p> <p>Note: To search by Employee ID, Status Type or Billing Type, click the Add More Criteria link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>Note: To sort the results by a column, click the column header name. To filter your results by status types, use the Status Types field to select/deselect sort options.</p> <p>3. From the Username column, click the link for the card account you wish to maintain.</p> <p>Note: You can also select the checkbox for the account and then scroll down to the bottom of the screen and click the Edit/Account Maintenance button. If you choose this option, continue to Step 5.</p> <p><i>The Cardholder Details screen displays.</i></p>

Screen



Cardholder Details

Manage Users & Accounts / ... / Cardholder Details /

PVT TEST ACCOUNT

Cardholder Details

- Assign/Unassign Applications
- Assign/Unassign Companies
- Deactivate User
- Edit CitiManager Profile
- Emulate Cardholder
- Replace Card
- Reset Password
- Reset Registration Details
- Update Alerts
- View Account Information
- View Billing Account Information
- View Disputes
- View Hierarchy

There are 1 pending requests under this user. [View Requests](#)

Citi Commercial Card - **00 0020 [Open-Card Activation Required](#)

Current Balance \$ 0.00 **Available Credit** \$ 1.00 [Edit/Account Maintenance](#) [Replace Card](#)

Statement Closing December 28, 2023 **Credit Limit** \$ 1.00

Payment Due : No Payment Due

Current Amount Due \$ 0.00 **Next Payment Due** 0.00 (Not Available)

Last payment of \$ 8.89 received 01/08/2019

[View Scheduled Payments](#)

Payment History

Date	Payment Amount	Status
The company will settle any balance related to business approved signed for this card.		

[View Payment History](#)

Aging of Balance

Total Overdue \$ 0.00

1-30 Days	31-60 Days	61-90 Days	91-120 Days	> 121 Days
\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Recent Transactions [Additional Statement Details](#) [Advanced Search](#) [Print Statement](#) [Download Statement](#)

Time Period: **Recent Transaction** Type: **All Status**

Date	Transaction Date	Details	Exchange Rate	Amount	Status
No transaction found for selected duration.					

[Load More Transactions](#) [View All Transactions](#)

Card Contact Information [CitiManager Status: Activated](#)

PVT TEST ACCOUNT lisatest1005 **** *00 0020 Card Status: Open Account Opened Mar 02, 2018 Employee ID: 32515 Company Name - TEST COMPANY 005	Address TEST MANAGER, 14000 CITI CARDS MAKE BELIEVE FLORIDA, UNITED STATES OF AMERICA 12345	Email Address(es) Primary Email: lisa.test@noemail.com
Phone(s) Phone Number: 1234567890		

[View More Details](#) [Edit / Account Maintenance](#)

Step/Action

- Click the **Edit/Account Maintenance** button from the **Current Balance** section of the screen.
The Account Maintenance screen displays.

Cardholder Details Screen

Account Maintenance — Form Details Screen

Account Maintenance — Form Details Screen

Manage Application and Maintenance Requests (View Requests)

Key Concepts

You can search for and view all online application and maintenance requests submitted through the CitiManager Site. Non-cardholders can approve or reject the user requests as well as print requests, view the audit log and add comments to a request. It's recommended that you check requests on a regular basis to ensure they are being processed.

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

- View the Audit Log
- Override an approval
- Delete an application request
- Download applications
- View account documents

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

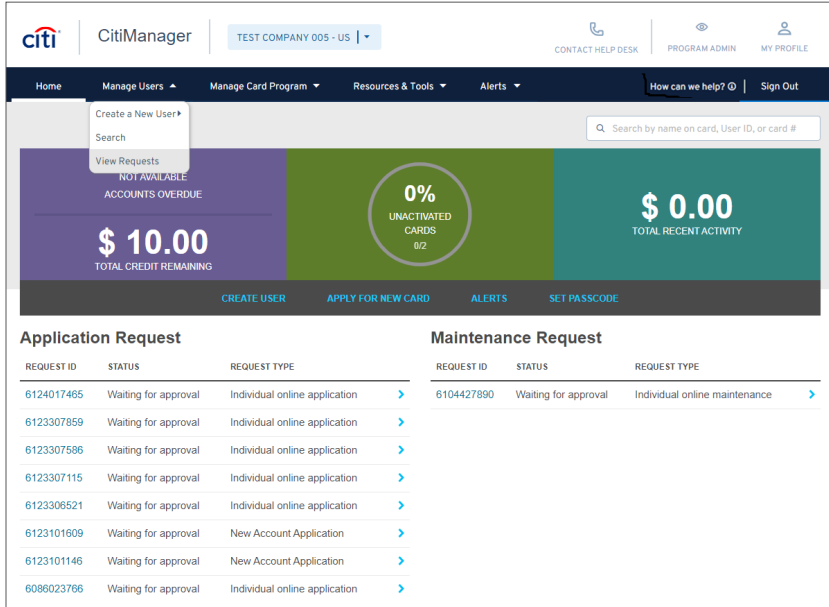
To delete an online application request, a Non-cardholder must have that entitlement assigned to them.

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

Common request statuses include the following:

Request Status	Description
Approved	Request was approved by the non-cardholder and will be processed by Citi.
Draft	Request was saved but not submitted.
More Information Requested	Request was sent back by the approver requesting additional information.
Pending Final Review by Citi	Request was placed in queue for CAS to process (e.g. when two applications were submitted with the same social security number). This status is not updated in the CitiManager Site. Contact your CAS for the current status of the request.
Rejected by the Processor	Request was rejected by the backend processor. Contact your CAS who will identify and correct the issue.
Processed	Request was processed and a card will be issued.
Waiting for Approval	Online Card Application request is awaiting non-cardholder approval.
Waiting for Signed Copy	Request has been approved but the country regulations require the applicant to sign a physical copy of the application and forward it to (CGSL).
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.
Expired	Request was not handled within a predefined time period.

Step-By-Step Instructions

Screen	Step/Action
	<p>1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the View Requests link,</p> <p>OR</p> <p>From the Home screen Application Request or Maintenance Request sections, click desired Request ID link and continue to Step 5.</p>

Screen

Search for Requests Screen

Step/Action

- To perform a search, type the desired search criteria and click the **Search** button.

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

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

The search results display at the bottom of the screen. A maximum of 1,200 records can be returned at a time.

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

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

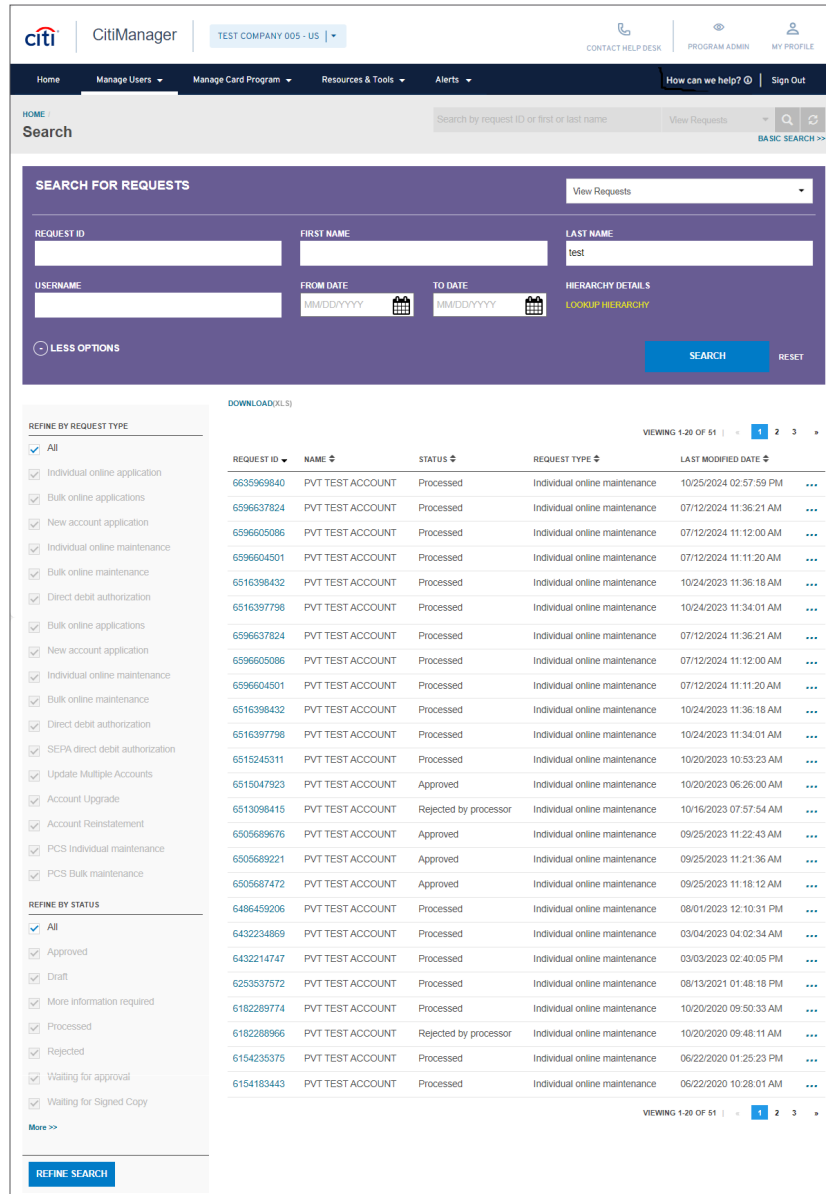
Note: De-select the **All** checkboxes first to activate the sort option checkboxes.

The requests displayed are filtered by the options selected.

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

The View Request screen displays.

Screen



SEARCH FOR REQUESTS

REQUEST ID: FIRST NAME: LAST NAME:

USERNAME: FROM DATE: TO DATE: HIERARCHY DETAILS:

SEARCH **RESET**

REFINE BY REQUEST TYPE

- ☒ All
- ☐ Individual online application
- ☐ Bulk online applications
- ☐ New account application
- ☐ Individual online maintenance
- ☐ Bulk online maintenance
- ☐ Direct debit authorization
- ☐ Bulk online applications
- ☐ New account application
- ☐ Individual online maintenance
- ☐ Bulk online maintenance
- ☐ Direct debit authorization
- ☐ SEPA direct debit authorization
- ☐ Update Multiple Accounts
- ☐ Account Upgrade
- ☐ Account Reinstatement
- ☐ PCS Individual maintenance
- ☐ PCS Bulk maintenance

REFINE BY STATUS

- ☒ All
- ☐ Approved
- ☐ Draft
- ☐ More information required
- ☐ Processed
- ☐ Rejected
- ☐ Waiting for approval
- ☐ Waiting for Signed Copy

VIEWING 1-20 OF 51

REQUEST ID	NAME	STATUS	REQUEST TYPE	LAST MODIFIED DATE
6635969840	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/25/2024 02:57:59 PM
6596637824	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:36:21 AM
6596605086	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:12:00 AM
6596604501	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:11:20 AM
6516398432	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/24/2023 11:36:18 AM
6516397798	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/24/2023 11:34:01 AM
6596637824	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:36:21 AM
6596605086	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:12:00 AM
6596604501	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:11:20 AM
6516398432	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/24/2023 11:36:18 AM
6516397798	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/24/2023 11:34:01 AM
6515245311	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/20/2023 10:53:23 AM
6515047923	PVT TEST ACCOUNT	Approved	Individual online maintenance	10/20/2023 06:26:00 AM
6513098415	PVT TEST ACCOUNT	Rejected by processor	Individual online maintenance	10/16/2023 07:57:54 AM
6505689676	PVT TEST ACCOUNT	Approved	Individual online maintenance	09/25/2023 11:22:43 AM
6505689221	PVT TEST ACCOUNT	Approved	Individual online maintenance	09/25/2023 11:21:36 AM
6505687472	PVT TEST ACCOUNT	Approved	Individual online maintenance	09/25/2023 11:18:12 AM
6486459206	PVT TEST ACCOUNT	Processed	Individual online maintenance	08/01/2023 12:10:31 PM
6432234869	PVT TEST ACCOUNT	Processed	Individual online maintenance	03/04/2023 04:02:34 AM
6432214747	PVT TEST ACCOUNT	Processed	Individual online maintenance	03/03/2023 02:40:05 PM
6253537572	PVT TEST ACCOUNT	Processed	Individual online maintenance	08/13/2021 01:48:18 PM
6182289774	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/20/2020 09:50:33 AM
6182288966	PVT TEST ACCOUNT	Rejected by processor	Individual online maintenance	10/20/2020 09:48:11 AM
6154235375	PVT TEST ACCOUNT	Processed	Individual online maintenance	06/22/2020 01:25:23 PM
6154183443	PVT TEST ACCOUNT	Processed	Individual online maintenance	06/22/2020 10:28:01 AM

VIEWING 1-20 OF 51

View Request Screen

Step/Action

- Review the request details.
- When you are finished reviewing the request, select either the **Approve** or **Reject** radio button.

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

A confirmation message displays.

