Online Applications Quick Start Guide for Cardholders

Commercial Card

CitiManager

December 2023

Treasury and Trade Solutions

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Apply for Card Using an Invitation Passcode

Key Concepts

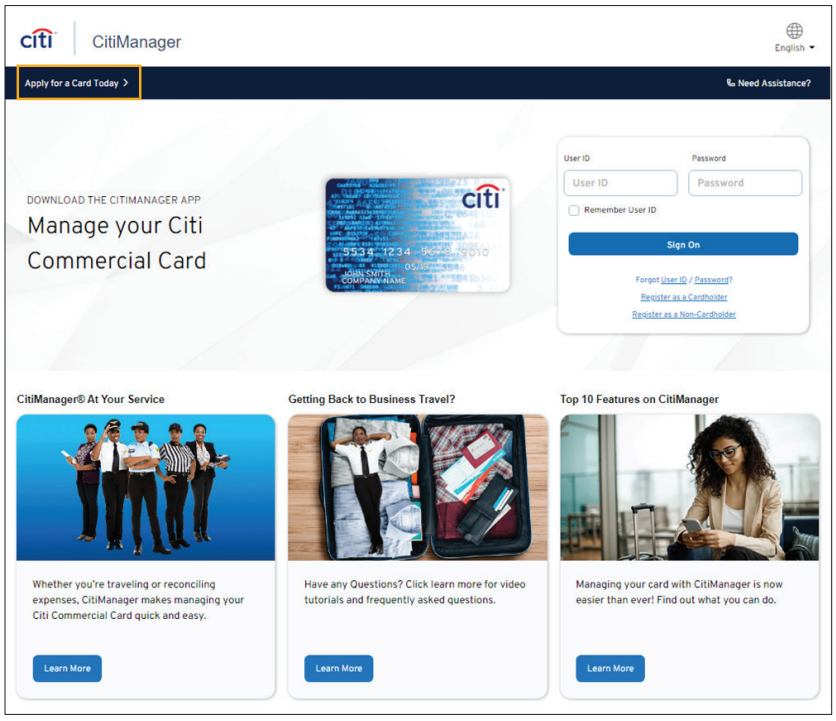
Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required. Both are obtained from your Program Administrator.

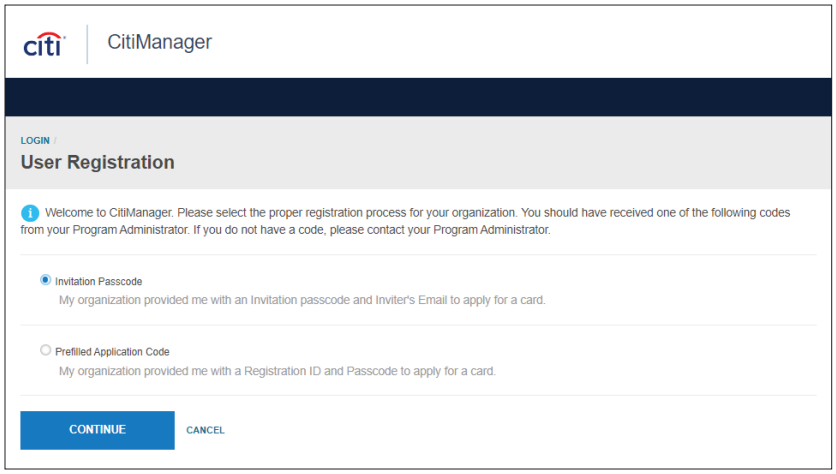
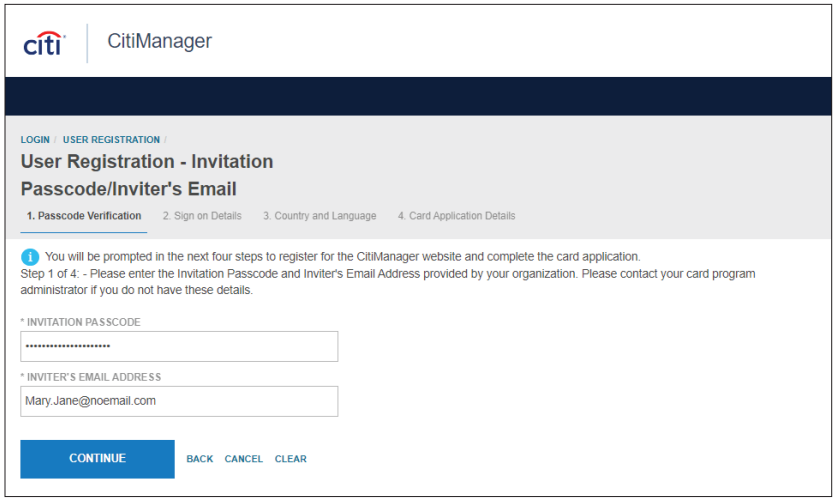
Once you have submitted your application, you will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Program Administrator.

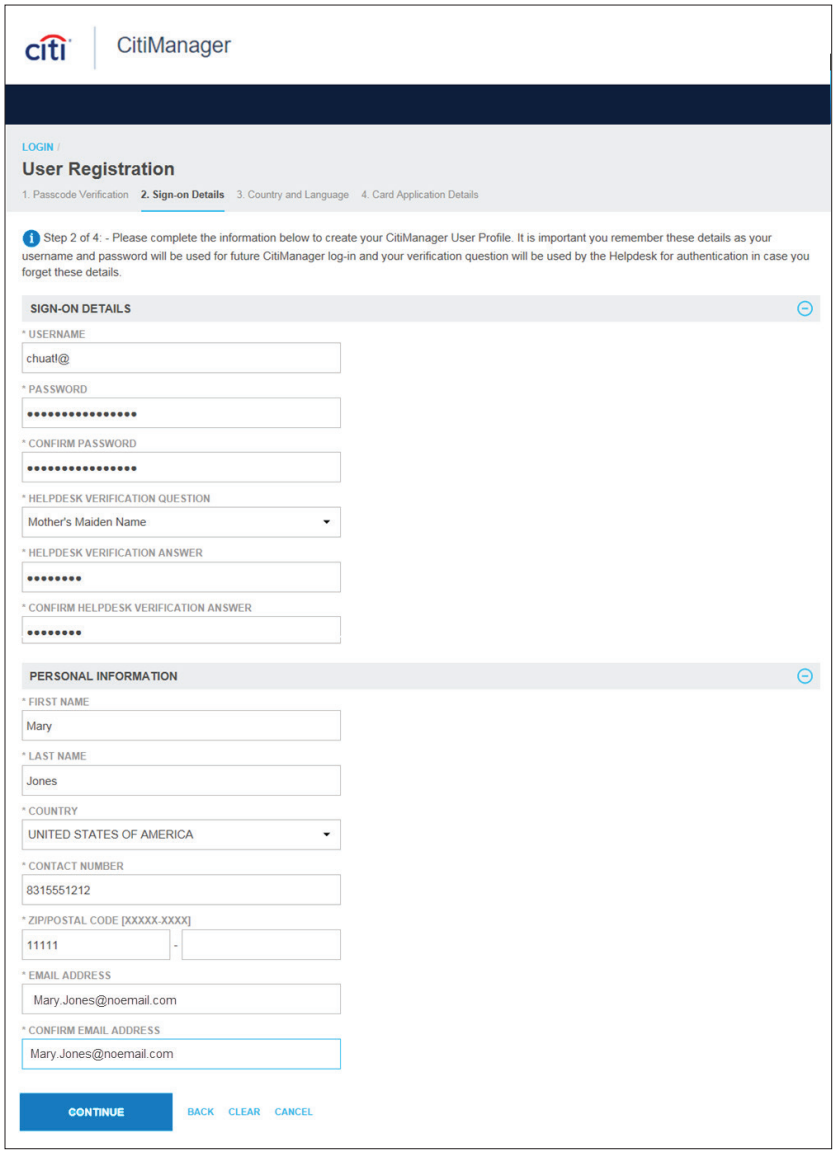
You can view the status of your application in the CitiManager Site by using the username and passcode created during the application process to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional information.

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

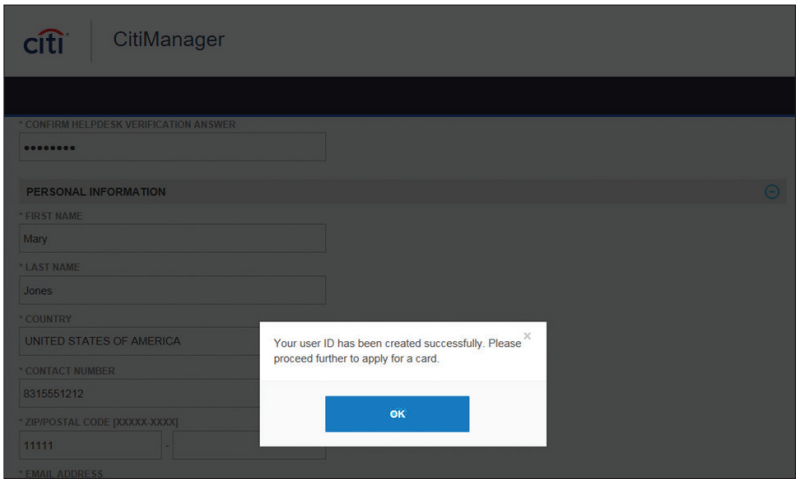
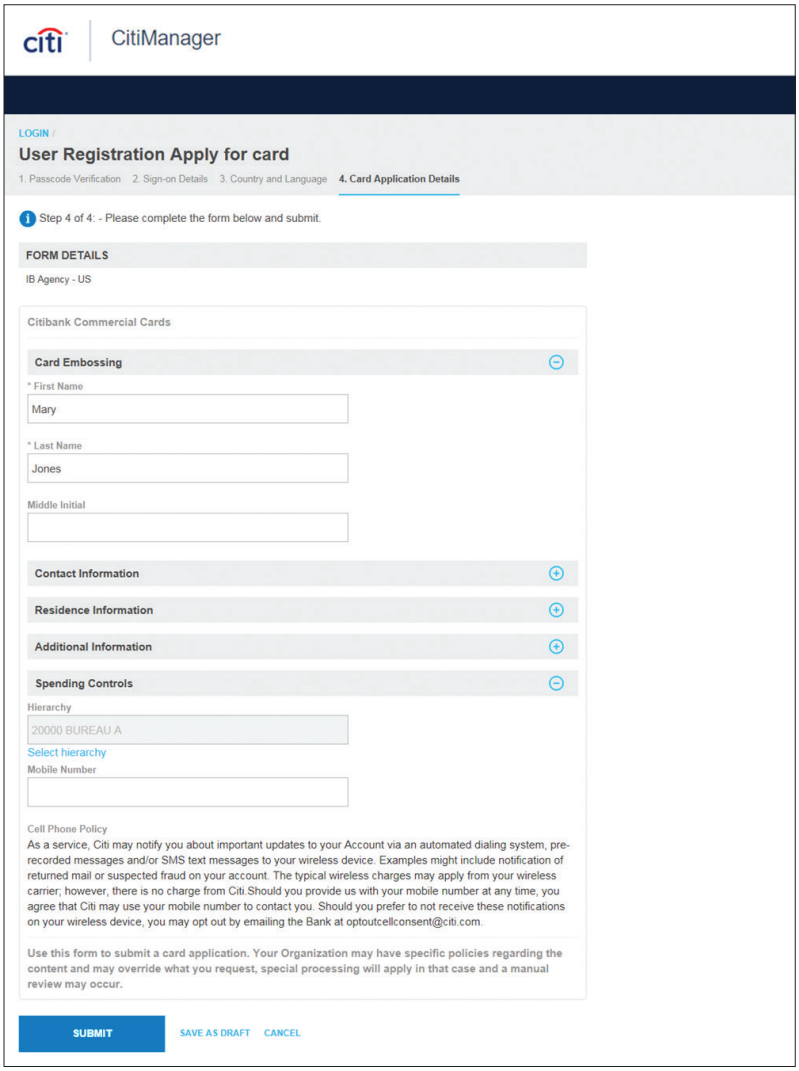
Step-by-Step Instructions

Screen	Step/Action
 **CitiManager Site Login Screen**	1. Navigate to **citimanager.com/login**. 2. From the **CitiManager Site Login** screen header, click the **Apply for a Card Today** link. *The User Registration screen displays.*

Screen	Step/Action
 **User Registration Screen**	3. Select the **Invitation Passcode** radio button and click the **Continue** button. *The User Registration — Invitation Passcode/ Inviter's Email screen displays.*
 **User Registration — Invitation Passcode/Inviter's Email Screen**	4. In the **Invitation Passcode** field, type the Invitation Passcode that was provided to you by your Program Administrator. 5. In the **Inviter's Email Address** field, type the Inviter's Email address that was provided to you by your Program Administrator. **Note:** The Invitation Passcode is case sensitive. 6. Click the **Continue** button. *The User Registration — Sign-on Details screen displays.* **Note:** All new applicants are required to create a user profile for the CitiManager Site during the application process.

Screen	Step/Action
	7. Complete the required fields in the **Sign-on Details** and **Personal Information** sections. **Note:** The password and username requirements display in a window as you type your password. A checkmark displays when the requirements are fulfilled. 8. Click the **Continue** button. *A confirmation message displays indicating your user ID has been created.* The CitiManager Site sends an e-mail confirming the registration and username created.

User Registration Screen — Sign-on Details

Screen	Step/Action
 **Confirmation Message**	9. Click the **OK** button. *The User Registration — Country and Language screen displays.* **Note:** Based on your company's set-up, this screen may not display. Continue to Step 12. 10. The **Select country** and **Select language** fields should be pre-populated based on what was entered in the **User Profile** screen. Click the **Continue** button. *The Card Application Details screen displays.*
 **User Registration Apply for Card — Card Application Details Screen**	11. Complete the required fields in all sections of the application. Required fields are indicated by an asterisk (*). 12. When you are finished, click the **Submit** button that displays at the bottom of the screen. *An application submission confirmation message displays.* 13. Click the **OK** button. *The CitiManager Login screen displays.* **Note:** The approving Supervisor or Program Administrator will receive an e-mail indicating your application is awaiting their approval.

Apply for New Card Using a Registration ID and Registration Passcode

Key Concepts

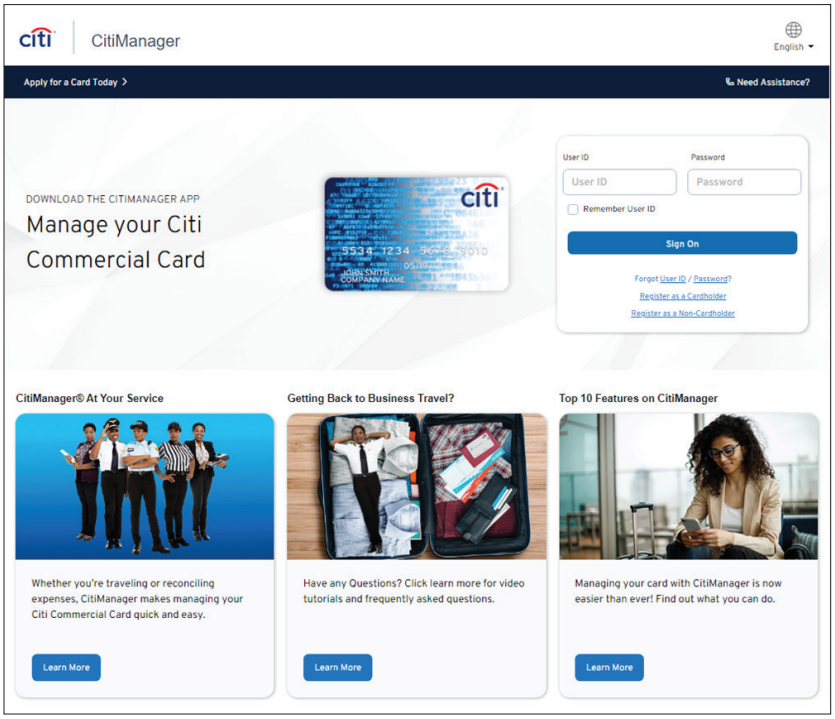
If your company uses the Program Administer to Card Applicant to Citi workflow for bulk-online applications, a Registration ID and Registration Passcode will be sent to you in separate e-mails so you can register for the CitiManager Site and enter your personal details on the application. Some of the 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.

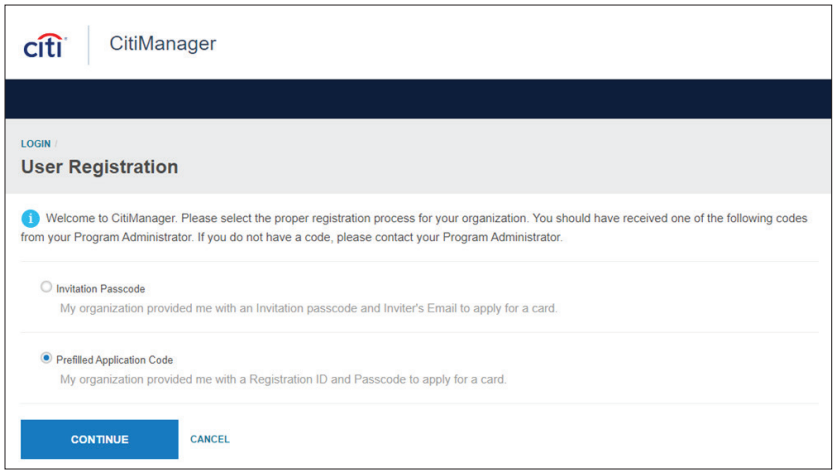
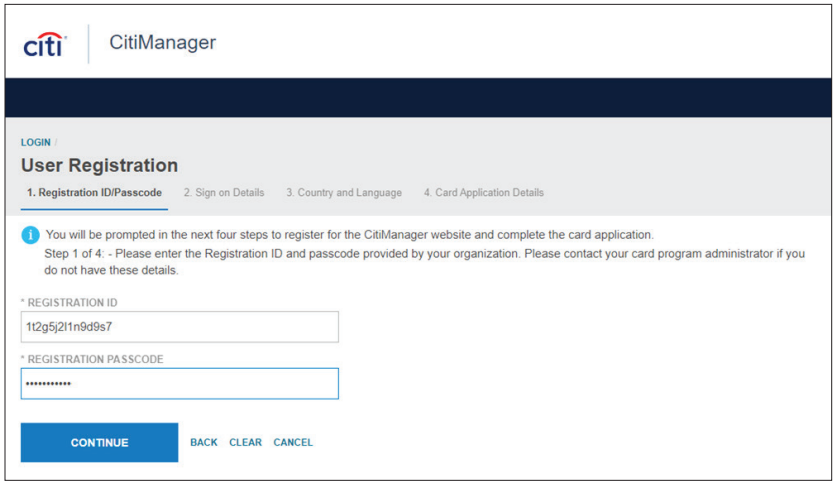
If you are already registered as a CitiManager Site user, and your Program Administrator is requesting an additional card, you will receive an e-mail with instructions for how to complete your application in the CitiManager site. Refer to the Log In to the CitiManager Site and Complete the Application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

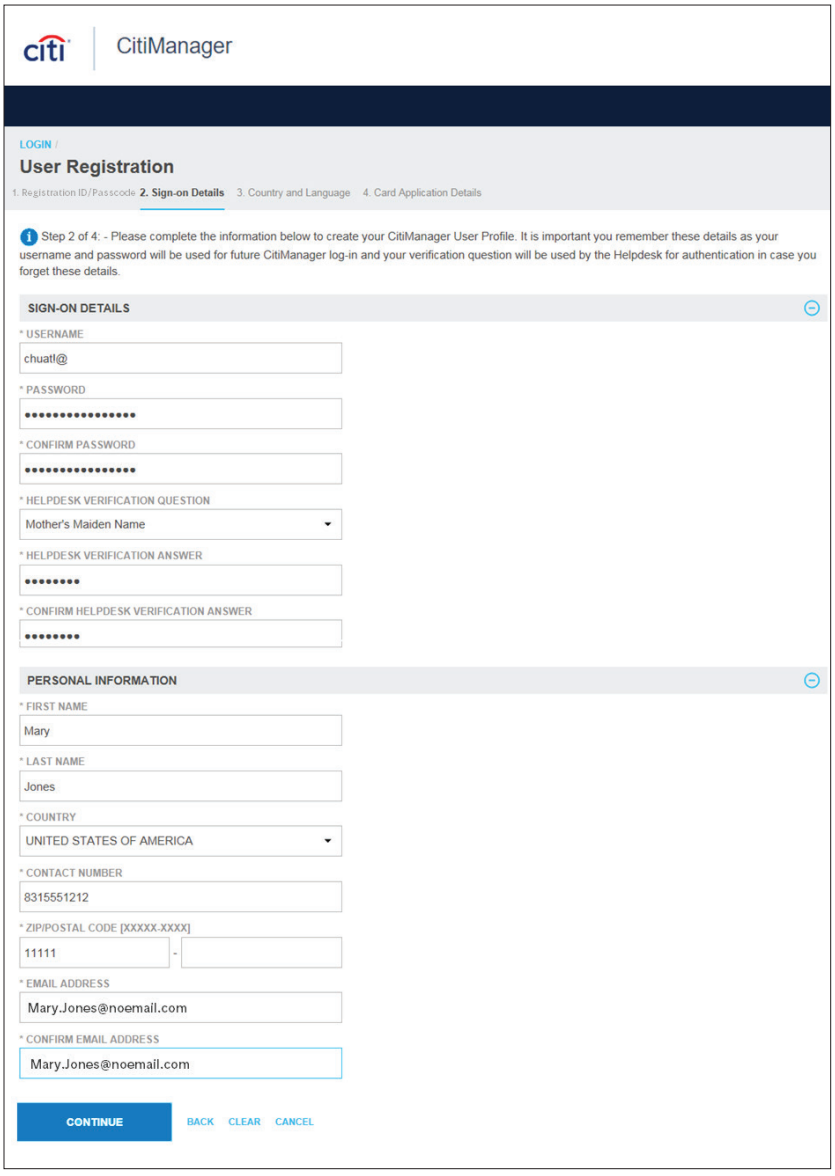
You can view the status of your application in the CitiManager Site by using the username and passcode created during the application process to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional information.

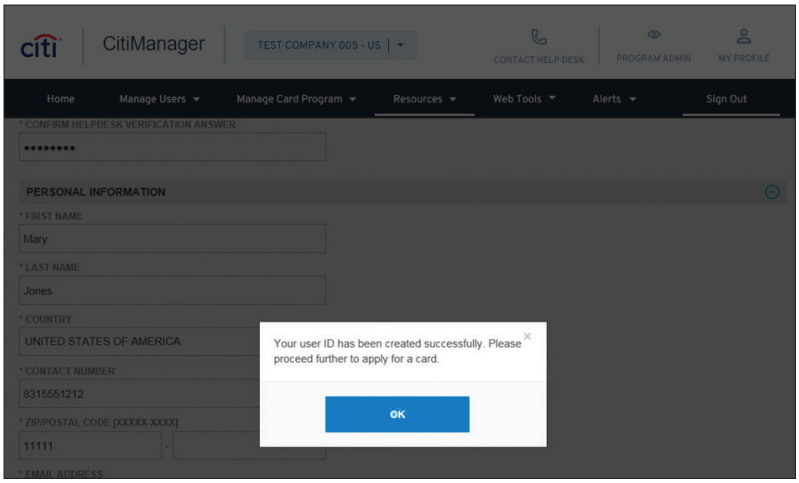
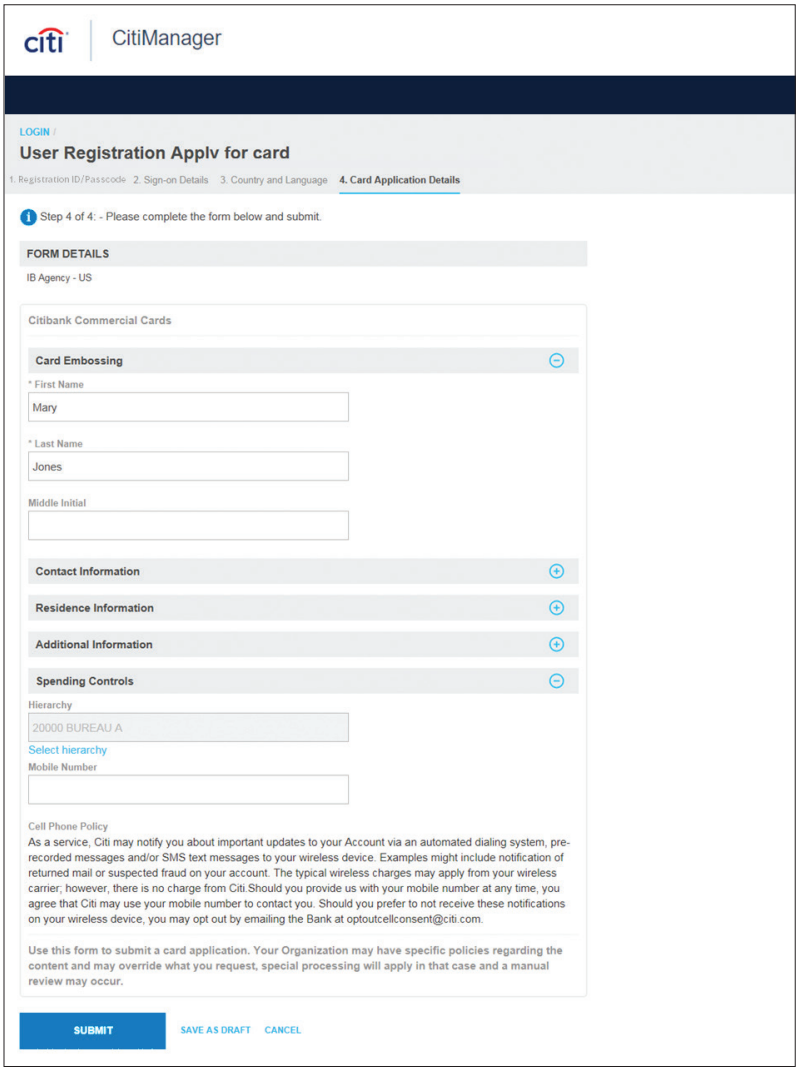
Once your card application is approved, the account will be linked to the CitiManager Site username and password that was created during the application process. This will allow you to log in to the CitiManager Site to view balances, credit limits, statements and perform other self-service tasks.

Step-by-Step Instructions

Screen	Step/Action
 **CitiManager Site Login Screen**	1. Navigate to **citimanager.com/login**. *The CitiManager site login screen displays.* 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. *The User Registration screen displays.*

Screen	Step/Action
 **User Registration**	3. Select the **Prefilled Application Code** radio button and click the **Continue** button. *The Registration ID/Passcode screen displays.*
 **User Registration — Registration ID/Passcode**	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. *The User Registration — Sign-on Details screen displays.* **Note:** All new Card Applicants are required to create a user profile for the CitiManager Site during the application process.

Screen	Step/Action
 **User Registration Screen — Sign-on Details**	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. 8. In the **Password** field, type a password that meets the password requirements. **Note:** The password requirements display in a window as you type your password. A checkmark displays when the requirement is fulfilled. 9. In the **Confirm Password** field, retype the password. 10. From the **Helpdesk Verification Question** drop-down list, select a verification question. **Note:** You may be asked this question by Citi when you contact the Helpdesk for assistance. 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. Scroll to the **Personal Information** section and complete the fields. **Note:** An asterisk (*) indicates a required field. 14. Click the **Continue** button. *A confirmation message displays indicating your user ID has been created.* **Note:** The CitiManager Site will send an e-mail confirming the registration and username created.

Screen	Step/Action
 **Confirmation Message**	15. Click the **OK** button. *The User Registration Apply for Card — Card Application Details screen displays.* **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 **Continue** button.
 **User Registration Apply for Card — Card Application Details Screen**	16. Complete the required fields on the application. **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. 17. Click the **Submit** button. *An application submission confirmation message displays.* 18. Click the **OK** button. *The CitiManager Site Login screen displays.* **Note:** The application is sent to Citi for processing. You will receive your card in approximately 7-10 days.

Apply for Card from My Profile

Key Concepts

If your company requires you to apply for a new card due to a merger or reorganization, and it's enabled for your company, you can log in to the CitiManager Site and click the **Apply for New Card** link from **My Profile**.

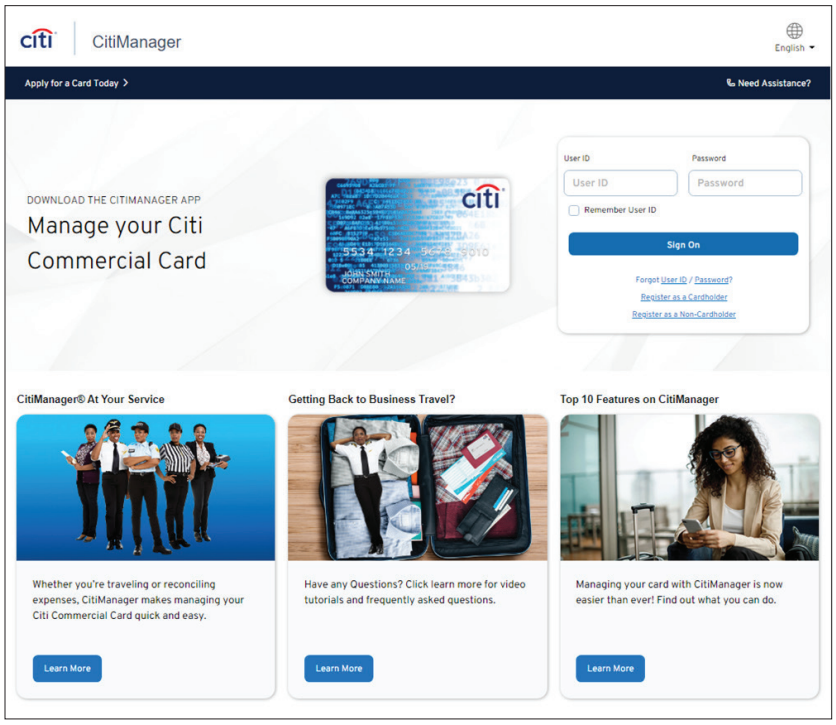
Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required. Both are obtained from your Program Administrator.

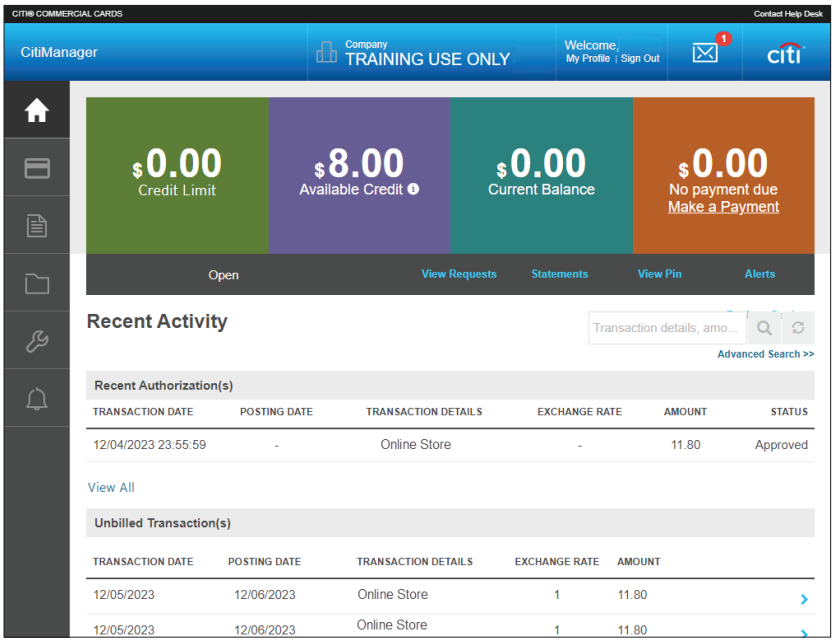
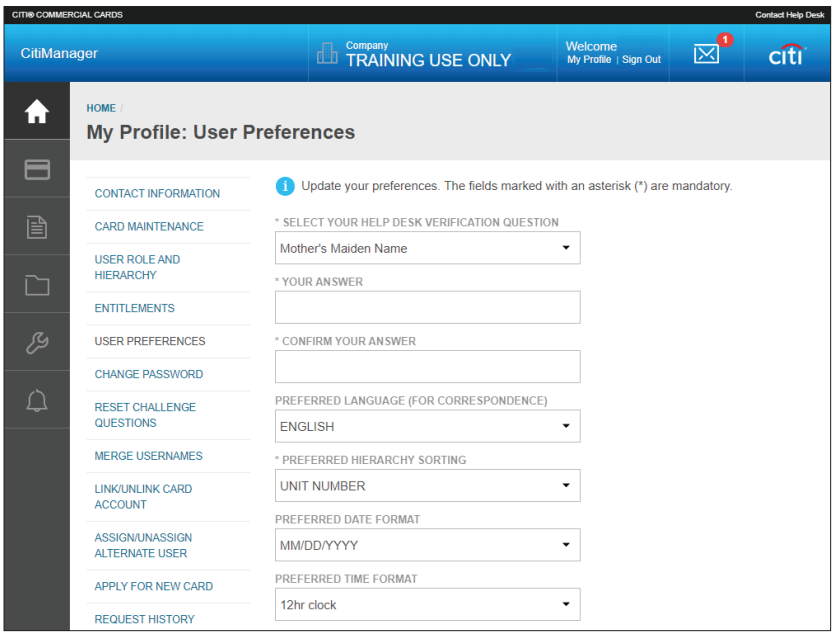
Once you have submitted your application, you will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Program Administrator.

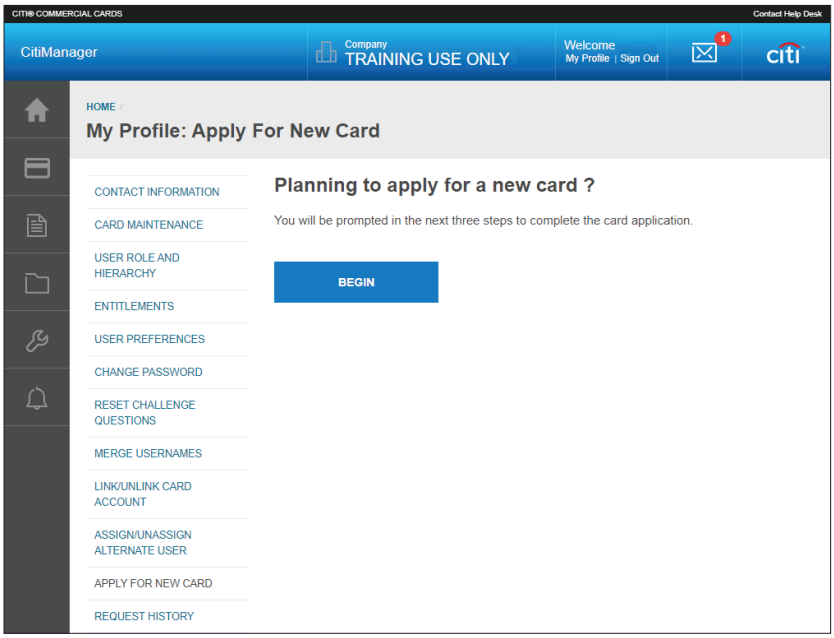
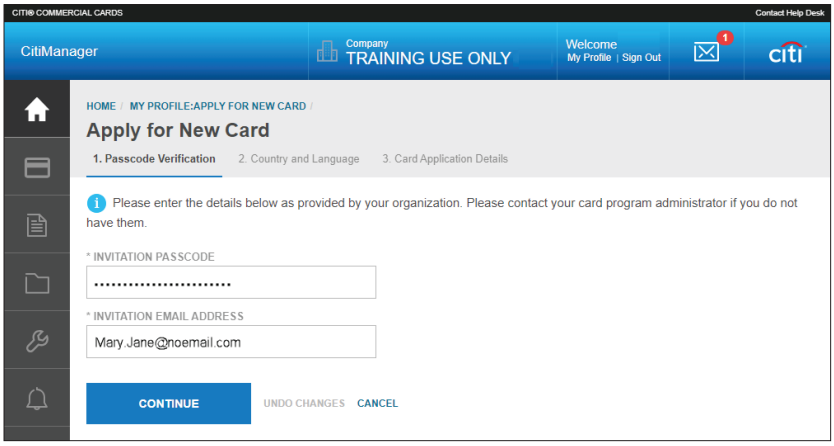
You can view the status of your application in the CitiManager Site by using the username and passcode to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional information.

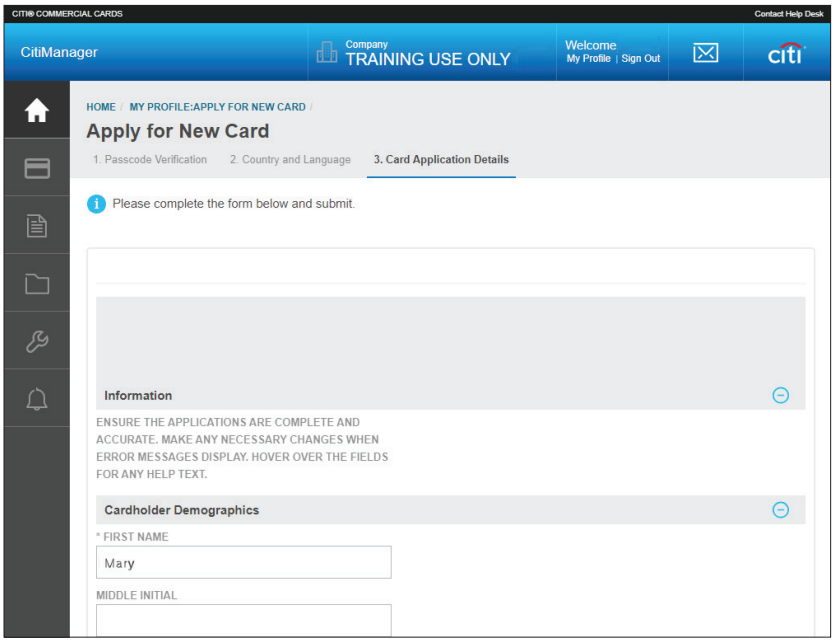
Once your card application is approved, the account will be linked to the CitiManager Site username and password that was previously created.

Step-By-Step Instructions

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

Screen	Step/Action
 **CitiManager Home Screen**	5. From the header, click the **My Profile** link that displays under your name. *The My Profile screen displays.*
 **My Profile Screen**	6. Click the **Apply for New Card** link from the left-side of the screen. *The My Profile: Apply For New Card screen displays.*

Screen	Step/Action
 **My Profile — Apply For New Card Screen**	7. Click the **Begin** button. *The Apply for New Card — Passcode Verification screen displays.*
 **Apply for New Card — Passcode Verification Screen**	8. In the **Invitation Passcode** field, type the Invitation Passcode that was provided to you by your Program Administrator. 9. In the **Inviter's Email Address** field, type the Inviter's Email address that was provided to you by your Program Administrator. **Note:** The Invitation Passcode is case sensitive. 10. Click the **Continue** button. *The Apply for New Card — Card Details screen displays.*

Screen	Step/Action
 **Apply for New Card — Card Application Details Screen**	11. Complete the required fields on the application. **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. 12. Click the **Submit** button. *An application submission confirmation message displays.* 13. Click the **OK** button. *The CitiManager Login screen displays.* **Note:** The approving Supervisor or Program Administrator will receive an email indicating your applications is awaiting their approval.

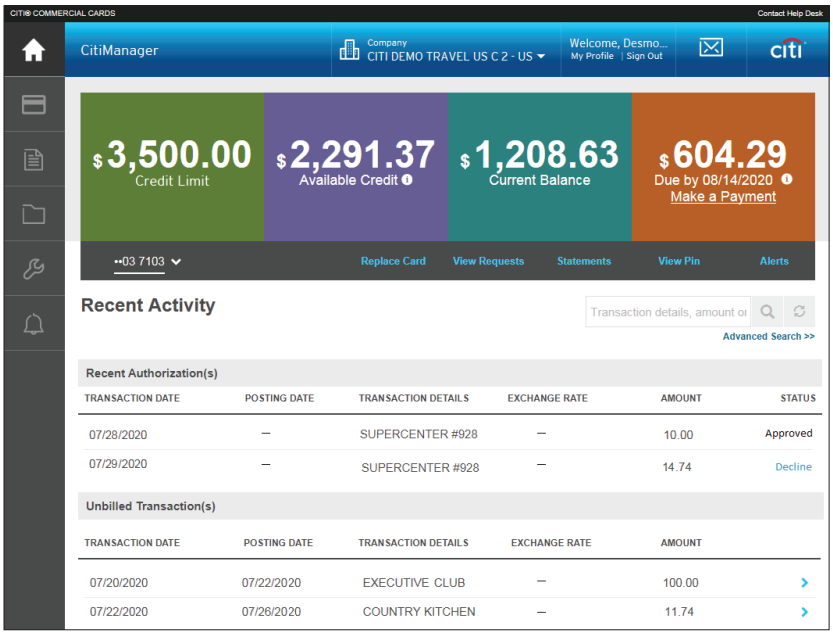
View Application and Maintenance Request History

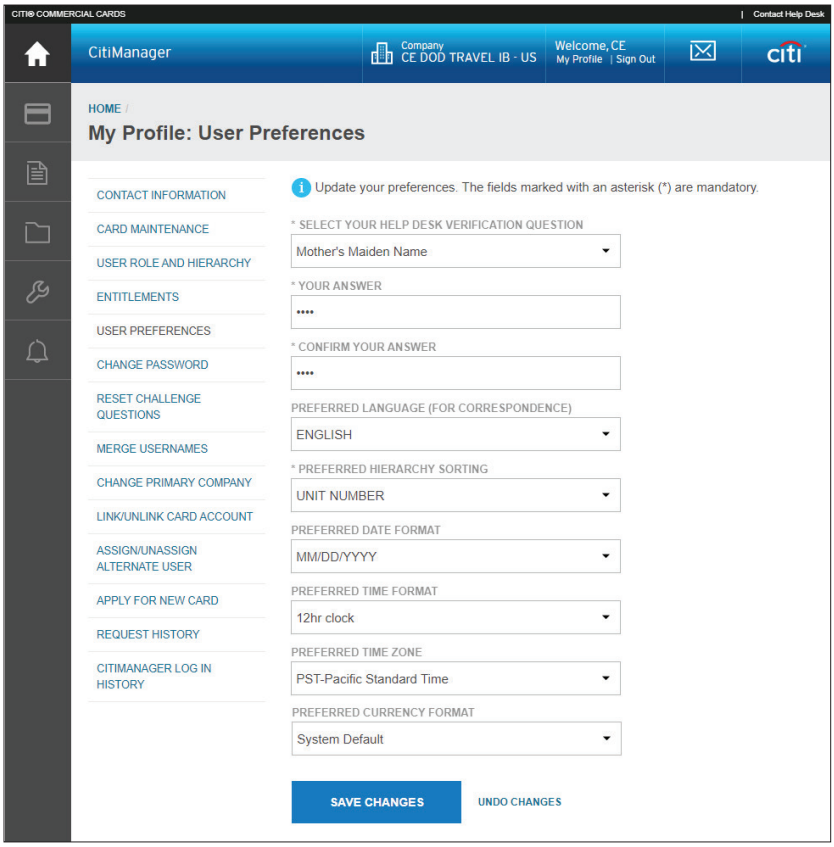
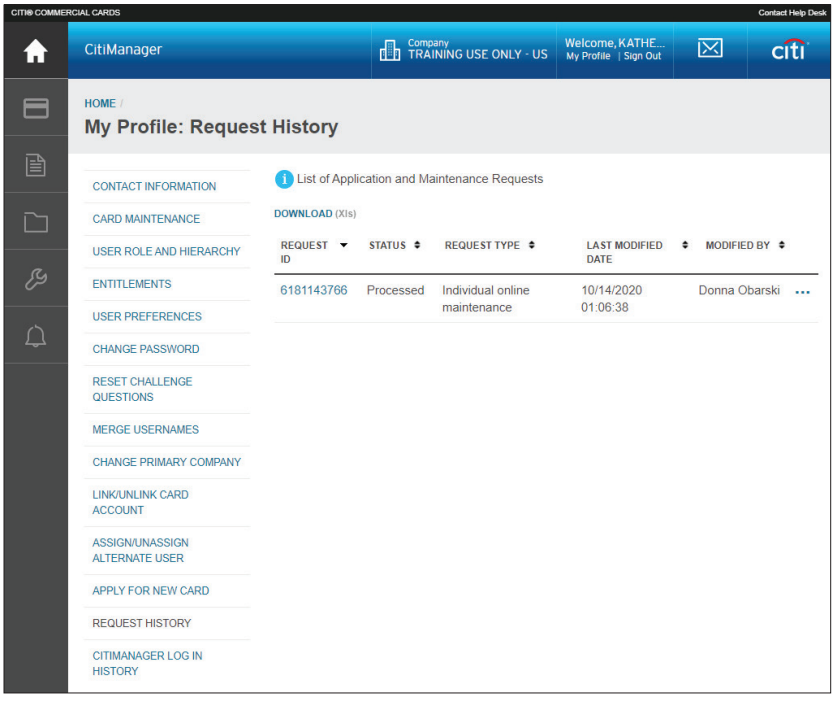
Key Concepts

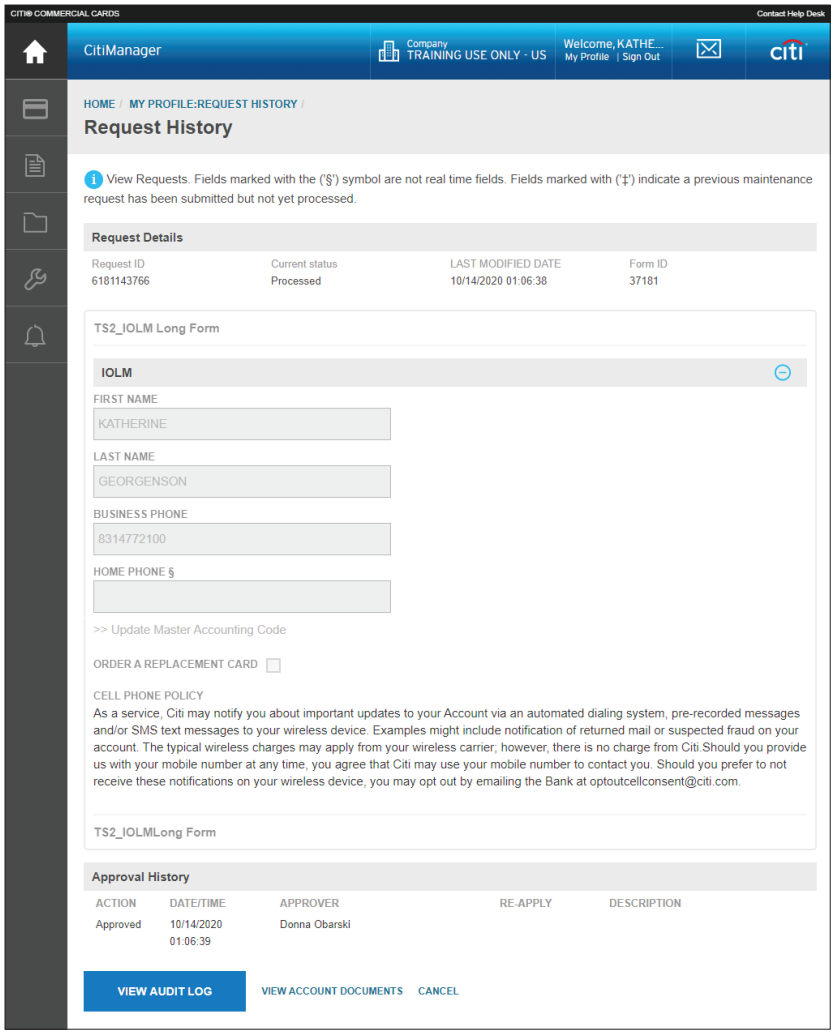
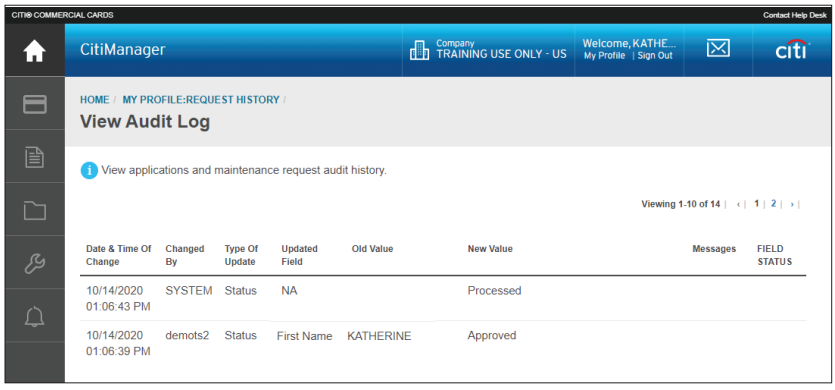
You can view information about your account application and maintenance requests including the following information:

- 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

Screen	Step/Action
 **CitiManager Site Home Screen**	1. From the CitiManager Site header, click the **My Profile** link that displays under your name. *The My Profile — User Preferences screen displays.*

Screen	Step/Action
 **My Profile — User Preferences Screen**	2. Click the **Request History** link. *A list of application and maintenance requests display.* **Note:** If there are no requests, a message displays indicating there are no requests for this user.
 **My Profile — Request History Screen**	3. To sort requests, click on header in which you'd like to sort the requests. 4. To view the hierarchy, expand the row for the desired request by clicking the **ellipsis (...)** link that displays to the right of the screen. 5. To view the details of a specific request, from the **Request ID** column, click the link for the desired request. *The application or maintenance request details display with the approval history.*

Screen	Step/Action
 **Request Details Screen**	6. To view additional information from the **Contact Information, Additional Information, Spending Controls** sections or to view the **CitiManager Cardholder Account Agreement**, click the **(+) sign** icon from the section header as necessary. 7. To view the Audit Log, scroll to bottom of screen click the **View Audit Log** button. *The View Audit Log screen displays.*
 **View Audit Log Screen**	8. When you are finished viewing the **Audit Log**, scroll to the bottom of the screen and click the **Back** button.

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