

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

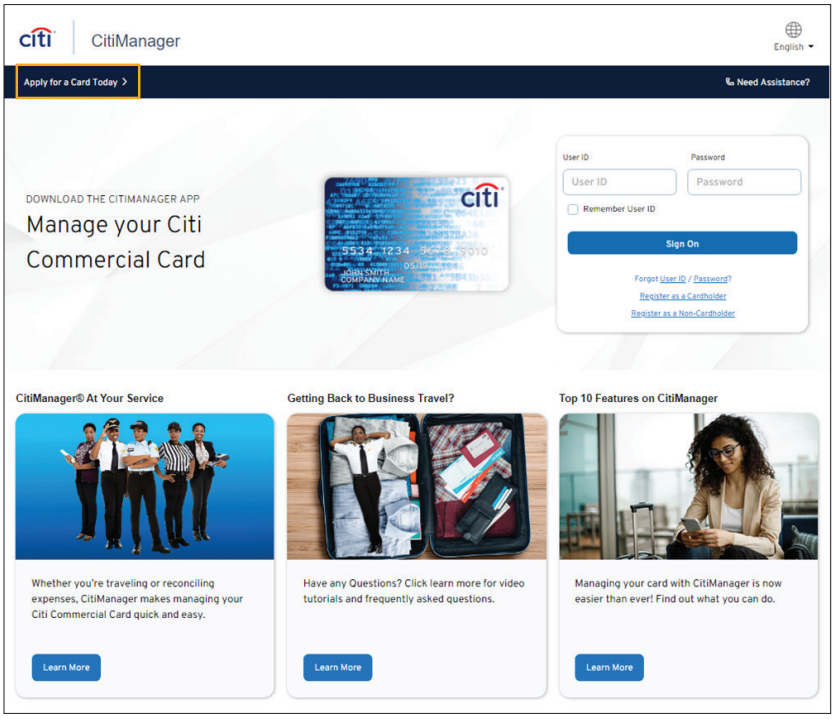
Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required. Both are obtained from your Program Administrator.

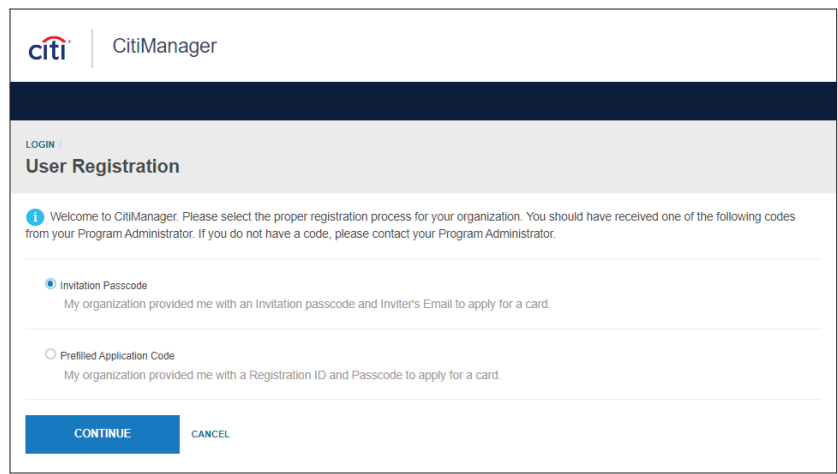
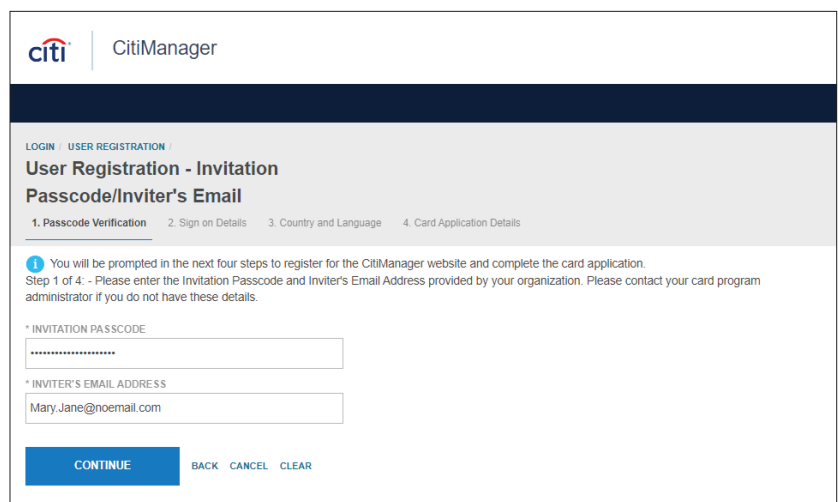
Once you have submitted your application, you will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Program Administrator.

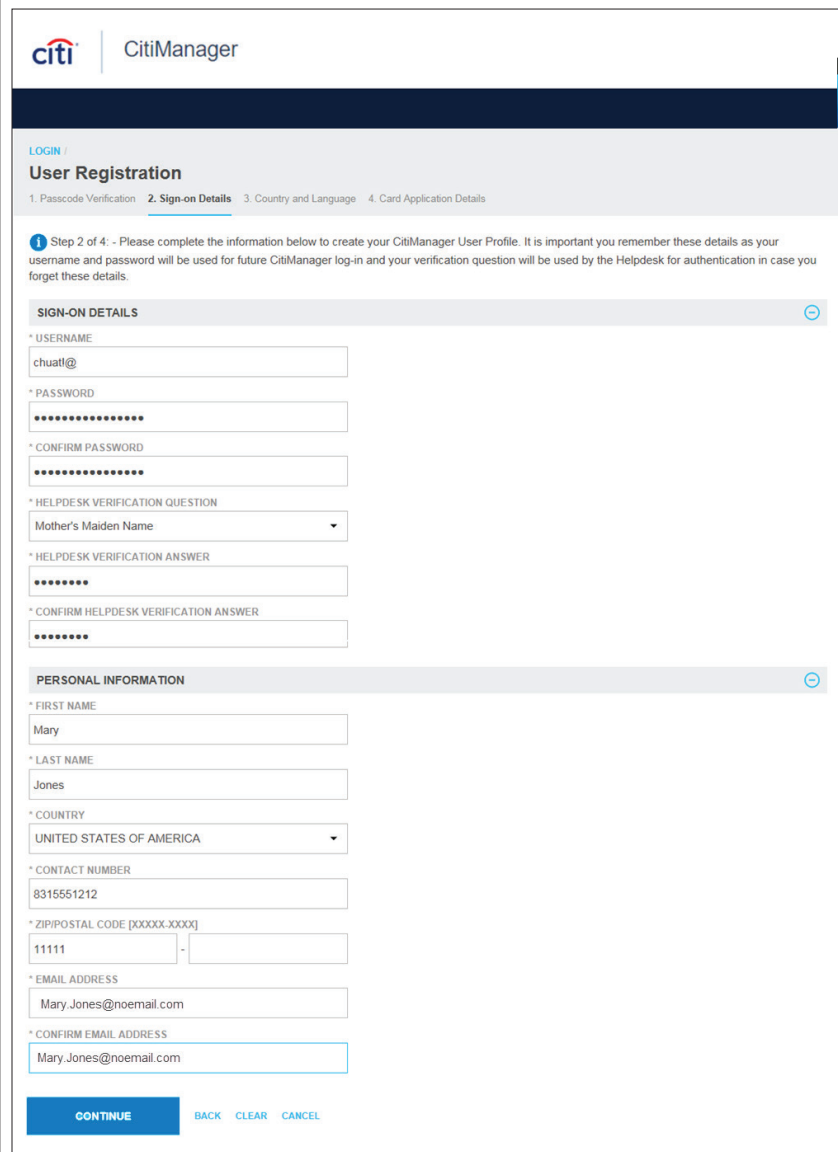
You can view the status of your application in the CitiManager Site by using the username and passcode created during the application process to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional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

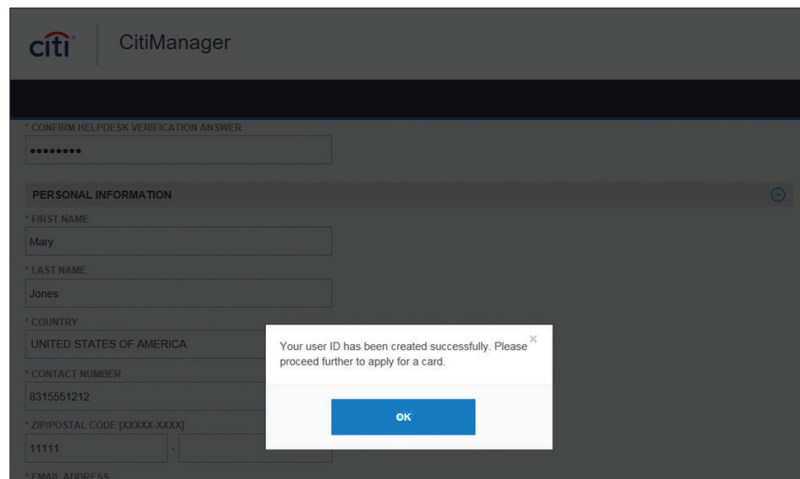
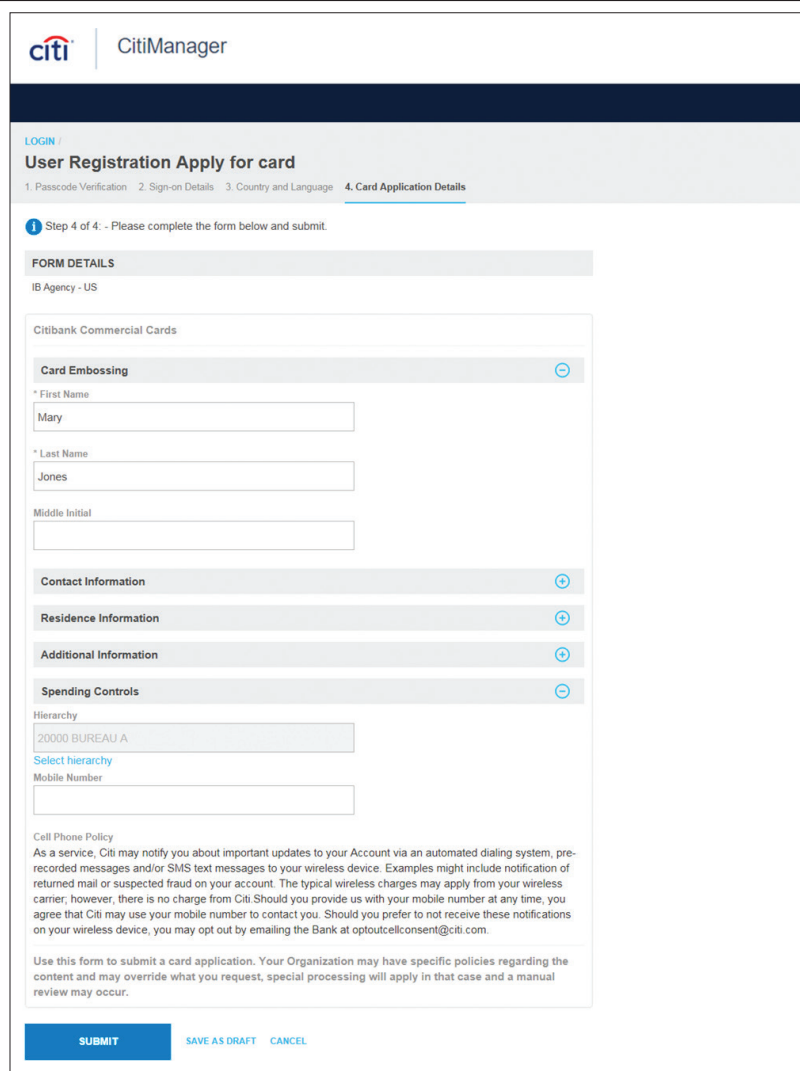
Once your card application is approved, the account will be linked to the CitiManager Site username and password that was created during the application process. This will allow you to log in to the CitiManager Site to view balances, credit limits, statements and perform other self-service tasks.

Step-by-Step Instructions

Screen	Step/Action
	<ol style="list-style-type: none"> 1. Navigate to citimanager.com/login. 2. From the CitiManager Site Login screen header, click the Apply for a Card Today link. <i>The User Registration screen displays.</i>

Screen	Step/Action
 <p>The screenshot shows the CitiManager 'User Registration' screen. It has a header with the Citi logo and 'CitiManager'. Below is a 'LOGIN' link and the title 'User Registration'. A welcome message states: 'Welcome to CitiManager. Please select the proper registration process for your organization. You should have received one of the following codes from your Program Administrator. If you do not have a code, please contact your Program Administrator.' There are two radio button options: 'Invitation Passcode' (selected) with the description 'My organization provided me with an Invitation passcode and Inviter's Email to apply for a card.' and 'Prefilled Application Code' with the description 'My organization provided me with a Registration ID and Passcode to apply for a card.' At the bottom are 'CONTINUE' and 'CANCEL' buttons.</p> <p>User Registration Screen</p>	<p>3. Select the Invitation Passcode radio button and click the Continue button.</p> <p><i>The User Registration — Invitation Passcode/ Inviter's Email screen displays.</i></p>
 <p>The screenshot shows the 'User Registration - Invitation Passcode/Inviter's Email' screen. It has a header with the Citi logo and 'CitiManager'. Below is a 'LOGIN' link and the title 'User Registration - Invitation Passcode/Inviter's Email'. A progress bar shows four steps: '1. Passcode Verification' (active), '2. Sign on Details', '3. Country and Language', and '4. Card Application Details'. A message states: 'You will be prompted in the next four steps to register for the CitiManager website and complete the card application. Step 1 of 4: - Please enter the Invitation Passcode and Inviter's Email Address provided by your organization. Please contact your card program administrator if you do not have these details.' There are two input fields: '* INVITATION PASSCODE' and '* INVITER'S EMAIL ADDRESS' (containing 'Mary.Jane@noemail.com'). At the bottom are 'CONTINUE', 'BACK', 'CANCEL', and 'CLEAR' buttons.</p> <p>User Registration — Invitation Passcode/Inviter's Email Screen</p>	<p>4. In the Invitation Passcode field, type the Invitation Passcode that was provided to you by your Program Administrator.</p> <p>5. In the Inviter's Email Address field, type the Inviter's Email address that was provided to you by your Program Administrator.</p> <p>Note: The Invitation Passcode is case sensitive.</p> <p>6. Click the Continue button.</p> <p><i>The User Registration — Sign-on Details screen displays.</i></p> <p>Note: All new applicants are required to create a user profile for the CitiManager Site during the application process.</p>

Screen	Step/Action
 <p>User Registration</p> <p>1. Passcode Verification 2. Sign-on Details 3. Country and Language 4. Card Application Details</p> <p>Step 2 of 4: - Please complete the information below to create your CitiManager User Profile. It is important you remember these details as your username and password will be used for future CitiManager log-in and your verification question will be used by the Helpdesk for authentication in case you forget these details.</p> <p>SIGN-ON DETAILS</p> <p>* USERNAME chuatl@</p> <p>* PASSWORD *****</p> <p>* CONFIRM PASSWORD *****</p> <p>* HELPDESK VERIFICATION QUESTION Mother's Maiden Name</p> <p>* HELPDESK VERIFICATION ANSWER *****</p> <p>* CONFIRM HELPDESK VERIFICATION ANSWER *****</p> <p>PERSONAL INFORMATION</p> <p>* FIRST NAME Mary</p> <p>* LAST NAME Jones</p> <p>* COUNTRY UNITED STATES OF AMERICA</p> <p>* CONTACT NUMBER 8315551212</p> <p>* ZIP/POSTAL CODE [XXXXX-XXXX] 11111 -</p> <p>* EMAIL ADDRESS Mary.Jones@noemail.com</p> <p>* CONFIRM EMAIL ADDRESS Mary.Jones@noemail.com</p> <p>CONTINUE BACK CLEAR CANCEL</p>	<p>7. Complete the required fields in the Sign-on Details and Personal Information sections.</p> <p>Note: The password and username requirements display in a window as you type your password. A checkmark displays when the requirements are fulfilled.</p> <p>8. Click the Continue button.</p> <p><i>A confirmation message displays indicating your user ID has been created.</i></p> <p>The CitiManager Site sends an e-mail confirming the registration and username created.</p>
User Registration Screen — Sign-on Details	

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

Apply for New Card Using a Registration ID and Registration Passcode

Key Concepts

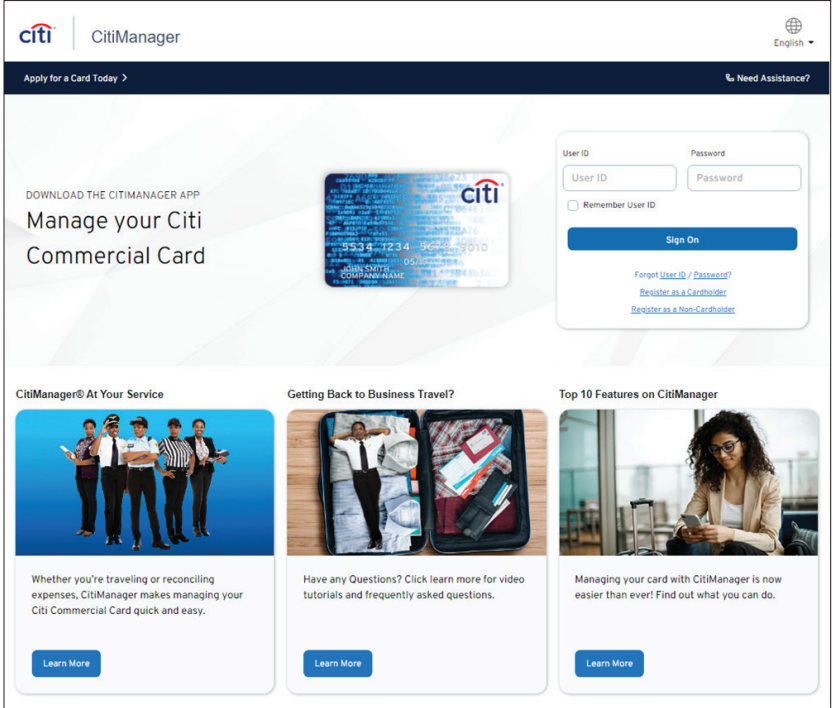
If your company uses the Program Administrator to Card Applicant to Citi workflow for bulk-online applications, a Registration ID and Registration Passcode will be sent to you in separate e-mails so you can register for the CitiManager Site and enter your personal details on the application. Some of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

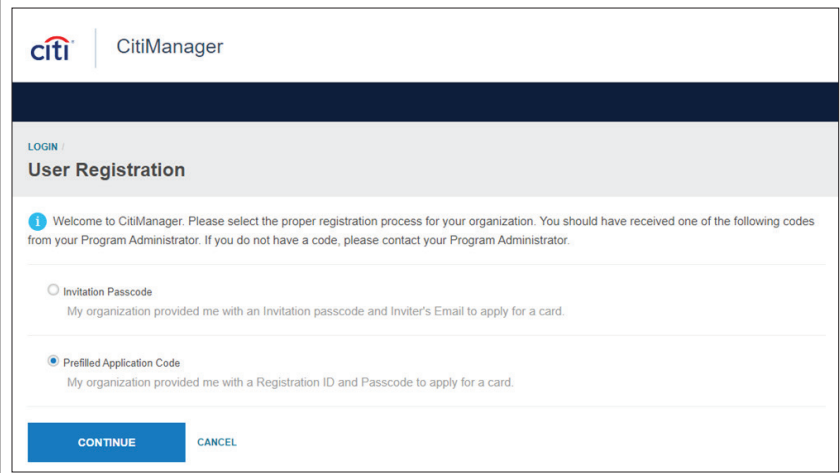
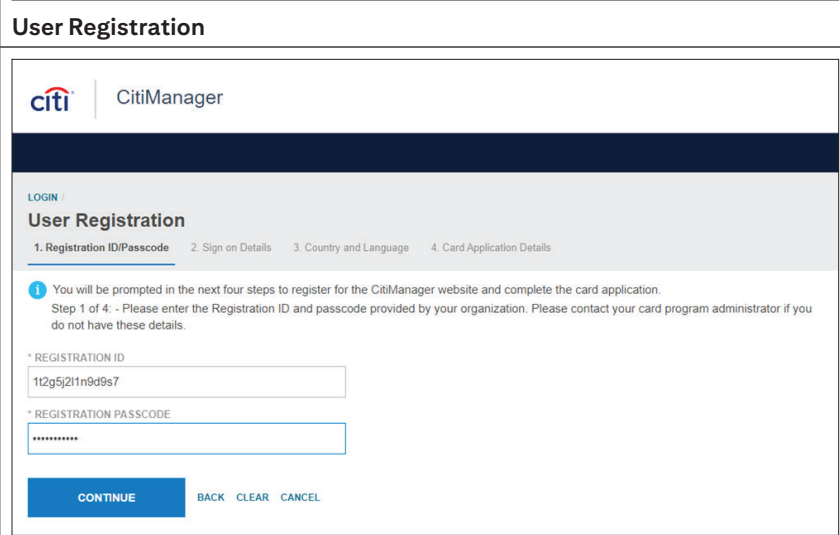
If you are already registered as a CitiManager Site user, and your Program Administrator is requesting an additional card, you will receive an e-mail with instructions for how to complete your application in the CitiManager site. Refer to the Log In to the CitiManager Site and Complete the Application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

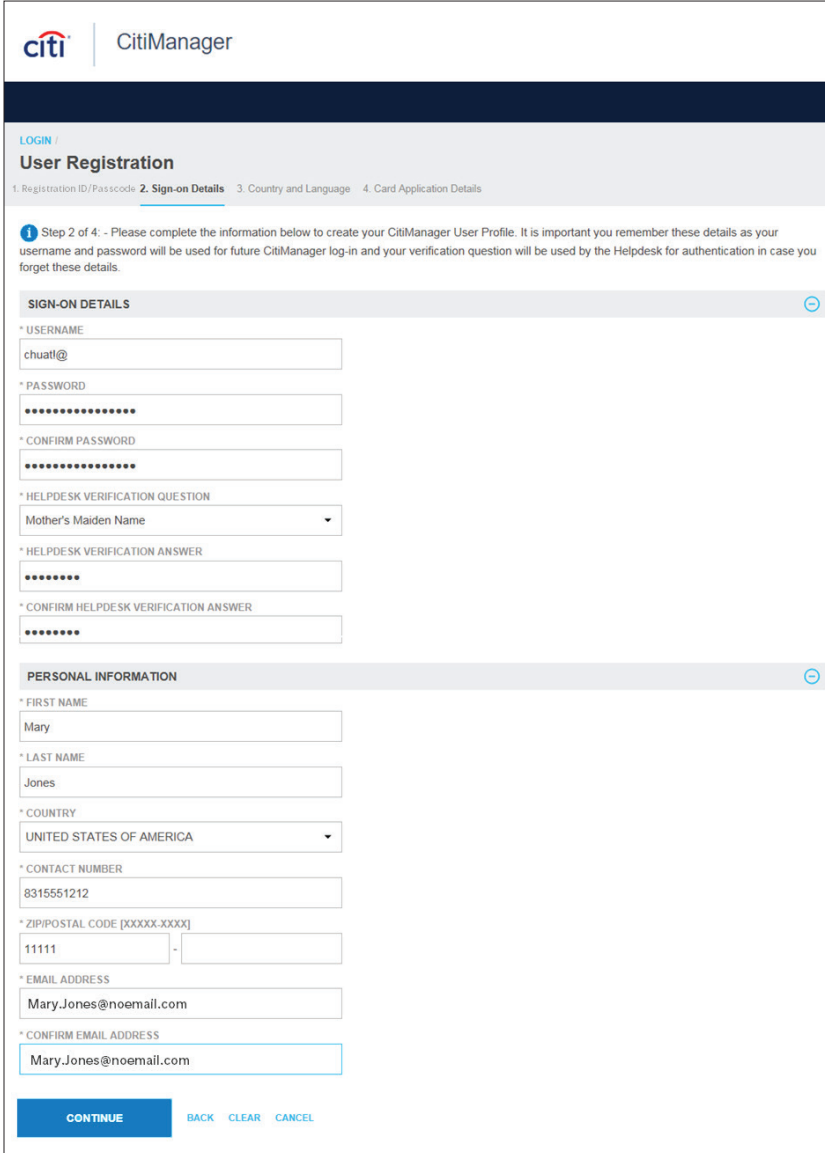
You can view the status of your application in the CitiManager Site by using the username and passcode created during the application process to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional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

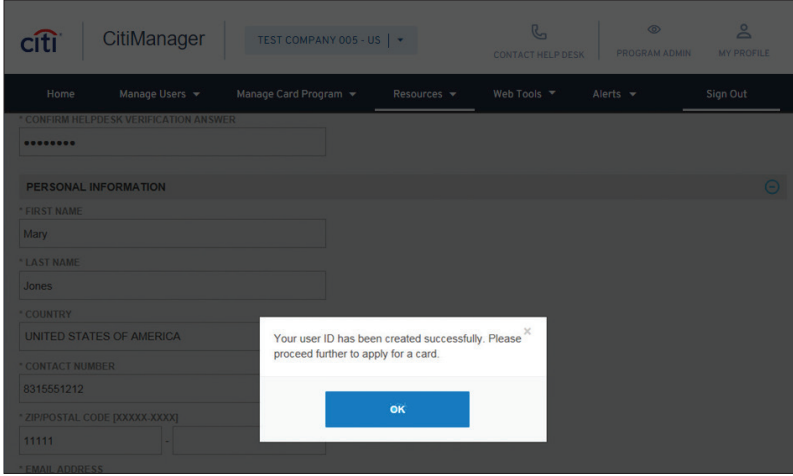
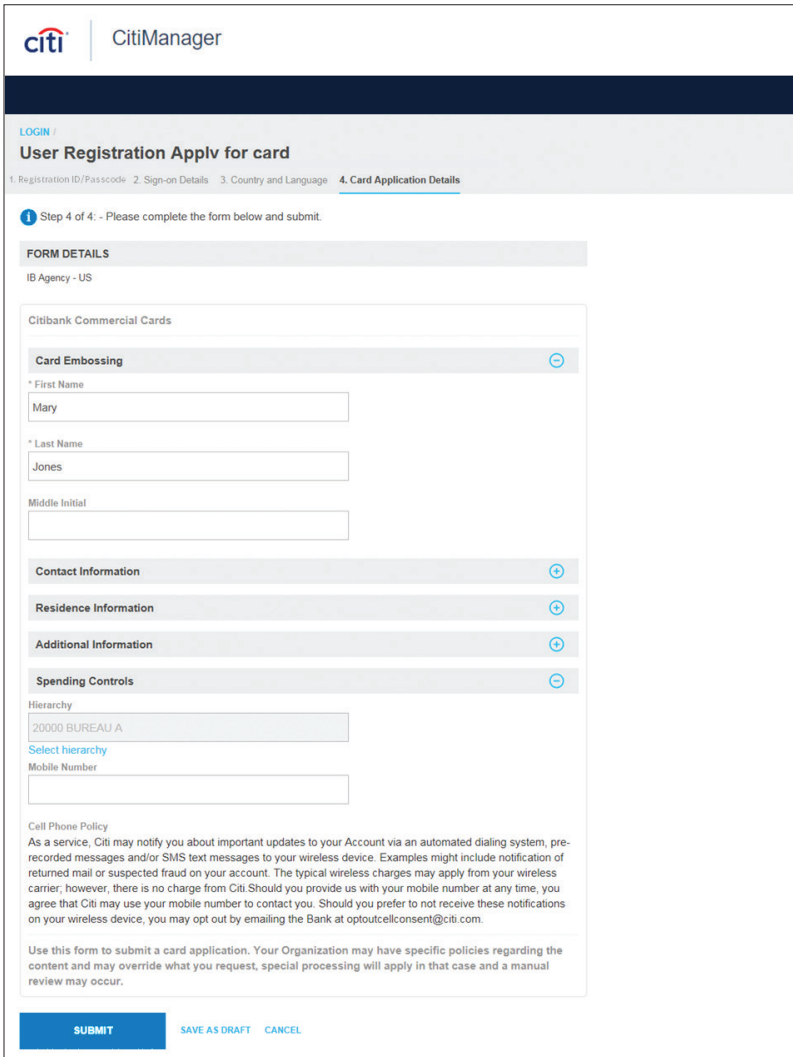
Step-by-Step Instructions

Screen	Step/Action
	<ol style="list-style-type: none"> 1. Navigate to 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>

Screen	Step/Action
 <p>The screenshot shows the CitiManager User Registration screen. It has a header with the Citi logo and 'CitiManager'. Below is a 'LOGIN' section with the title 'User Registration'. A message states: 'Welcome to CitiManager. Please select the proper registration process for your organization. You should have received one of the following codes from your Program Administrator. If you do not have a code, please contact your Program Administrator.' There are two radio button options: 'Invitation Passcode' (unselected) and 'Prefilled Application Code' (selected). Below each option is a description: 'My organization provided me with an Invitation passcode and Inviter's Email to apply for a card.' and 'My organization provided me with a Registration ID and Passcode to apply for a card.' At the bottom are 'CONTINUE' and 'CANCEL' buttons.</p>	<p>3. Select the Prefilled Application Code radio button and click the Continue button.</p> <p><i>The Registration ID/Passcode screen displays.</i></p>
 <p>The screenshot shows the CitiManager User Registration — Registration ID/Passcode screen. It has a header with the Citi logo and 'CitiManager'. Below is a 'LOGIN' section with the title 'User Registration'. A progress bar shows four steps: '1. Registration ID/Passcode' (active), '2. Sign on Details', '3. Country and Language', and '4. Card Application Details'. A message states: 'You will be prompted in the next four steps to register for the CitiManager website and complete the card application. Step 1 of 4 - Please enter the Registration ID and passcode provided by your organization. Please contact your card program administrator if you do not have these details.' There are two input fields: '* REGISTRATION ID' with the value '1t2g5j211n9d9s7' and '* REGISTRATION PASSCODE' with masked characters. At the bottom are 'CONTINUE', 'BACK', 'CLEAR', and 'CANCEL' buttons.</p>	<p>4. In the Registration ID field, type the Registration ID sent to your e-mail address by Citi.</p> <p>Note: The Registration ID field is case sensitive.</p> <p>5. In the Registration Passcode field, type the Registration Passcode sent your e-mail address by Citi.</p> <p>Note: The Registration Passcode field is case sensitive.</p> <p>6. Click the Continue button.</p> <p><i>The User Registration — Sign-on Details screen displays.</i></p>
<p>User Registration — Registration ID/Passcode</p>	<p>Note: All new Card Applicants are required to create a user profile for the CitiManager Site during the application process.</p>

Screen	Step/Action
 <p>User Registration</p> <p>1. Registration ID/Passcode 2. Sign-on Details 3. Country and Language 4. Card Application Details</p> <p>Step 2 of 4: - Please complete the information below to create your CitiManager User Profile. It is important you remember these details as your username and password will be used for future CitiManager log-in and your verification question will be used by the Helpdesk for authentication in case you forget these details.</p> <p>SIGN-ON DETAILS</p> <p>* USERNAME chuatl@</p> <p>* PASSWORD *****</p> <p>* CONFIRM PASSWORD *****</p> <p>* HELPDESK VERIFICATION QUESTION Mother's Maiden Name</p> <p>* HELPDESK VERIFICATION ANSWER *****</p> <p>* CONFIRM HELPDESK VERIFICATION ANSWER *****</p> <p>PERSONAL INFORMATION</p> <p>* FIRST NAME Mary</p> <p>* LAST NAME Jones</p> <p>* COUNTRY UNITED STATES OF AMERICA</p> <p>* CONTACT NUMBER 8315551212</p> <p>* ZIP/POSTAL CODE [XXXXX-XXXX] 11111 -</p> <p>* EMAIL ADDRESS Mary.Jones@noemail.com</p> <p>* CONFIRM EMAIL ADDRESS Mary.Jones@noemail.com</p> <p>CONTINUE BACK CLEAR CANCEL</p>	<p>7. 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 requirement is fulfilled.</p> <p>8. 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> <p>9. In the Confirm Password field, retype the password.</p> <p>10. 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> <p>11. In the Helpdesk Verification Answer field, type the answer to the verification question you selected.</p> <p>12. In the Confirm Helpdesk Verification Answer field, re-type the Helpdesk verification answer to the question you selected.</p> <p>13. Scroll to the Personal Information section and complete the fields.</p> <p>Note: An asterisk (*) indicates a required field.</p> <p>14. 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>

User Registration Screen — Sign-on Details

Screen	Step/Action
 <p>Confirmation Message</p>	<p>15. 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 Continue button.</p>
 <p>User Registration Apply for Card — Card Application Details Screen</p>	<p>16. 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>17. Click the Submit button.</p> <p><i>An application submission confirmation message displays.</i></p> <p>18. 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>

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**.

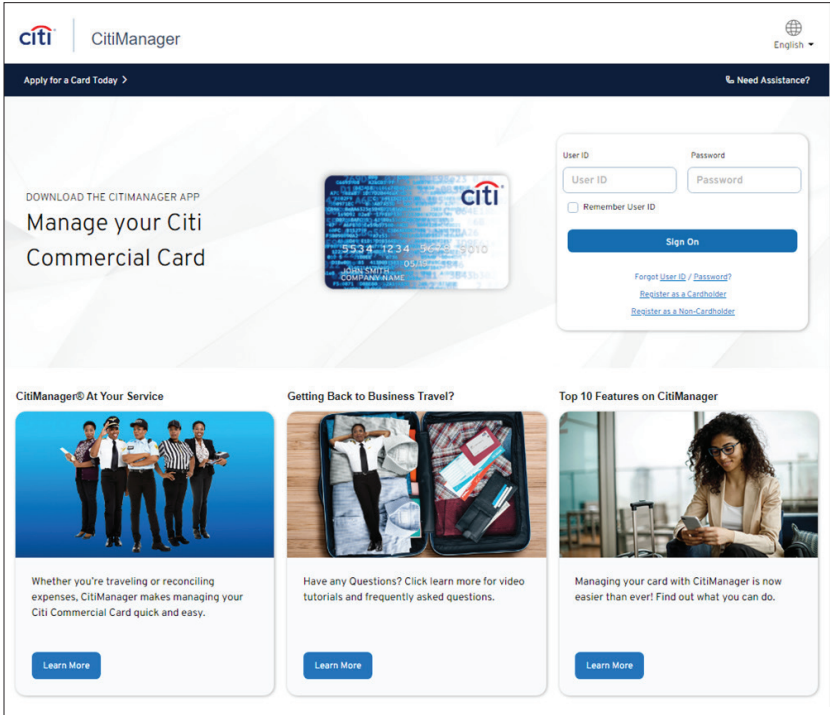
Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required. Both are obtained from your Program Administrator.

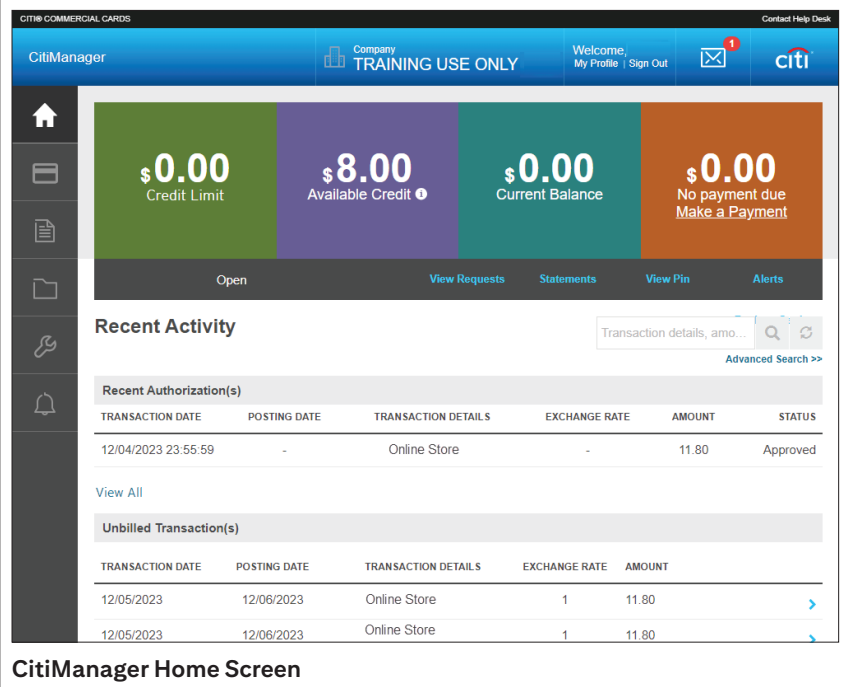
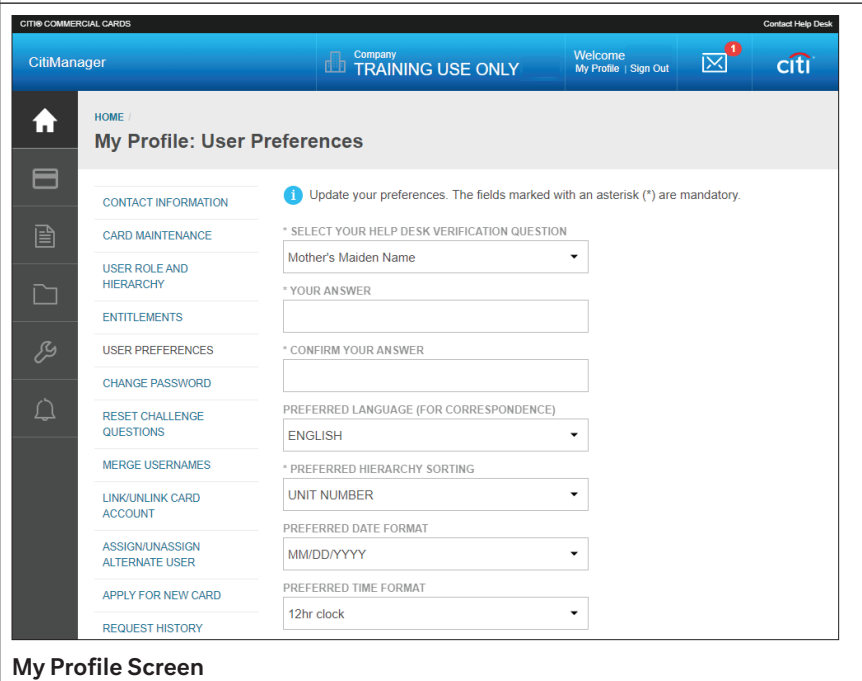
Once you have submitted your application, you will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Program Administrator.

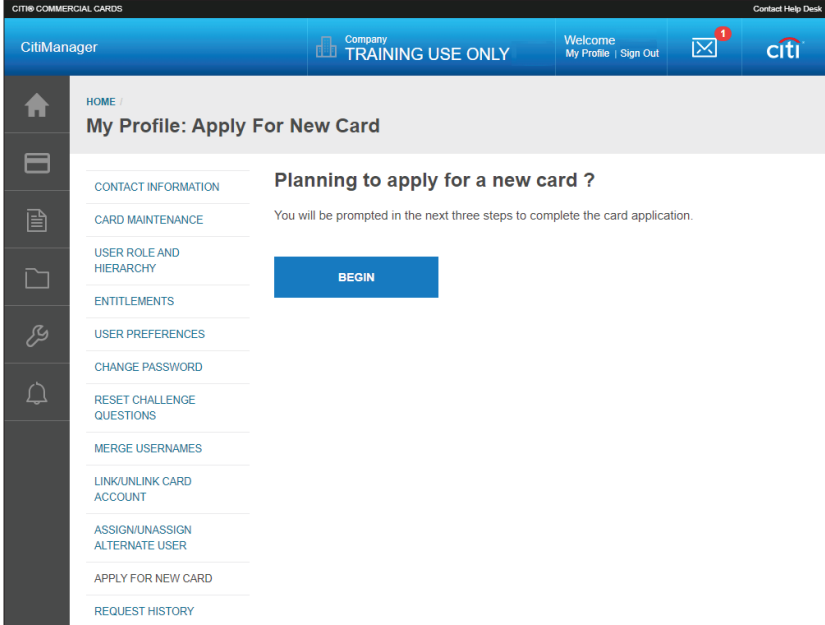
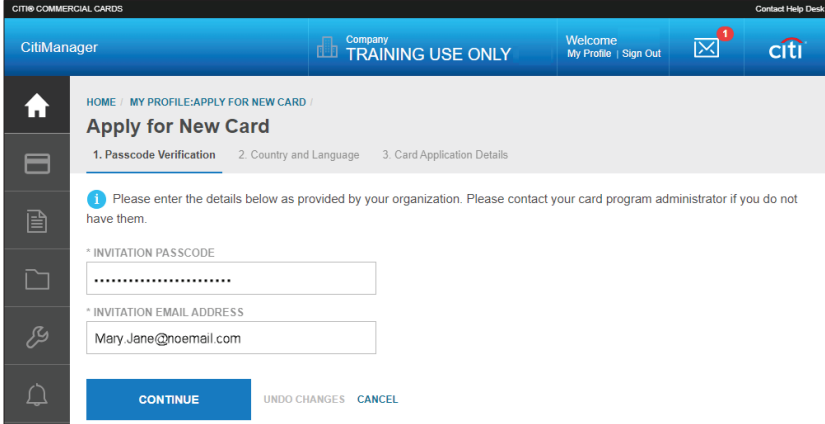
You can view the status of your application in the CitiManager Site by using the username and passcode to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional information.

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
	<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>

Screen	Step/Action
 <p>The screenshot shows the CitiManager Home Screen. At the top, there's a header with 'CitiManager', 'Company TRAINING USE ONLY', 'Welcome, My Profile Sign Out', and a notification icon. Below the header, there are four colored boxes displaying account information: Credit Limit (\$0.00), Available Credit (\$8.00), Current Balance (\$0.00), and No payment due (\$0.00). Below these are links: Open, View Requests, Statements, View Pin, and Alerts. The main section is titled 'Recent Activity' and includes a search bar and an 'Advanced Search >>' link. It contains two tables: 'Recent Authorization(s)' and 'Unbilled Transaction(s)'. The 'Recent Authorization(s)' table has columns for Transaction Date, Posting Date, Transaction Details, Exchange Rate, Amount, and Status. The 'Unbilled Transaction(s)' table has columns for Transaction Date, Posting Date, Transaction Details, Exchange Rate, and Amount.</p> <p>CitiManager Home Screen</p>	<p>5. From the header, click the My Profile link that displays under your name.</p> <p><i>The My Profile screen displays.</i></p>
 <p>The screenshot shows the 'My Profile: User Preferences' screen. It has a left sidebar with navigation links: HOME, My Profile: User Preferences, CONTACT INFORMATION, CARD MAINTENANCE, USER ROLE AND HIERARCHY, ENTITLEMENTS, USER PREFERENCES, CHANGE PASSWORD, RESET CHALLENGE QUESTIONS, MERGE USERNAMES, LINK/UNLINK CARD ACCOUNT, ASSIGN/UNASSIGN ALTERNATE USER, APPLY FOR NEW CARD, and REQUEST HISTORY. The main content area is titled 'My Profile: User Preferences' and includes a message: 'Update your preferences. The fields marked with an asterisk (*) are mandatory.' Below this are several form fields with labels and dropdown menus: '* SELECT YOUR HELP DESK VERIFICATION QUESTION' (Mother's Maiden Name), '* YOUR ANSWER', '* CONFIRM YOUR ANSWER', PREFERRED LANGUAGE (FOR CORRESPONDENCE) (ENGLISH), '* PREFERRED HIERARCHY SORTING' (UNIT NUMBER), PREFERRED DATE FORMAT (MM/DD/YYYY), and PREFERRED TIME FORMAT (12hr clock).</p> <p>My Profile Screen</p>	<p>6. Click the Apply for New Card link from the left-side of the screen.</p> <p><i>The My Profile: Apply For New Card screen displays.</i></p>

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



Screen	Step/Action
	<p>11. 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>12. Click the Submit button.</p> <p><i>An application submission confirmation message displays.</i></p> <p>13. Click the OK button.</p> <p><i>The CitiManager Login screen displays.</i></p> <p>Note: The approving Supervisor or Program Administrator will receive an email indicating your applications is awaiting their approval.</p>

Apply for New Card — Card Application Details Screen

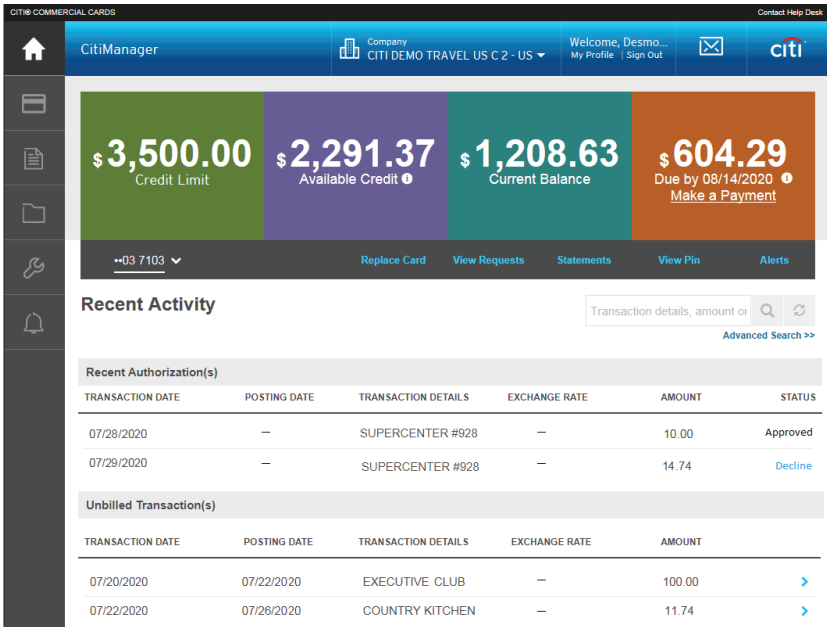
View Application and Maintenance Request History

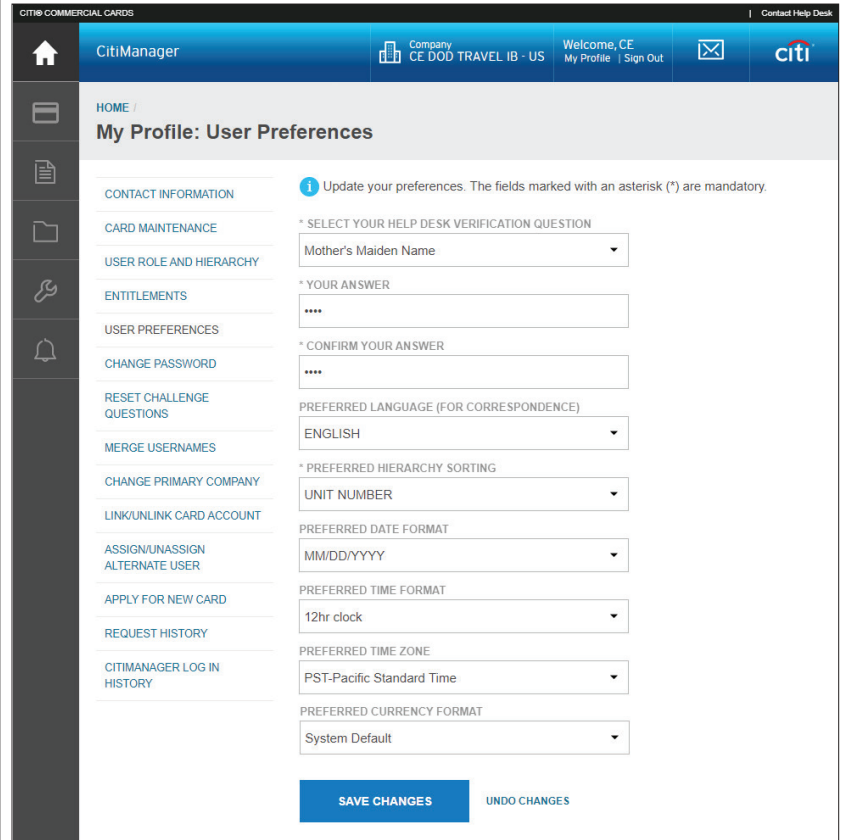
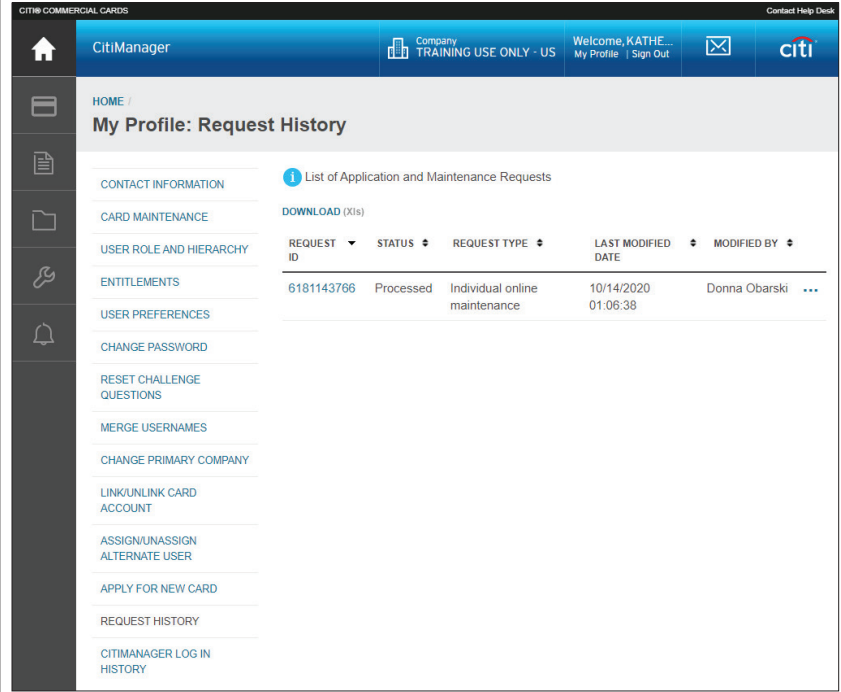
Key Concepts

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
 <p>The screenshot shows the CitiManager Site Home Screen. At the top, there's a header with the CitiManager logo, a company dropdown (CITI DEMO TRAVEL US C 2 - US), a welcome message (Welcome, Desmo...), and links for My Profile, Sign Out, and Contact Help Desk. Below the header, there are four large colored boxes displaying account information: Credit Limit (\$3,500.00), Available Credit (\$2,291.37), Current Balance (\$1,208.63), and Due by 08/14/2020 (\$604.29). Below these boxes are links for Replace Card, View Requests, Statements, View Pin, and Alerts. The main section is titled 'Recent Activity' and contains two tables. The first table, 'Recent Authorization(s)', shows two transactions from SUPERCENTER #928, one approved and one declined. The second table, 'Unbilled Transaction(s)', shows two transactions from EXECUTIVE CLUB and COUNTRY KITCHEN.</p> <p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> 1. From the CitiManager Site header, click the My Profile link that displays under your name. <i>The My Profile — User Preferences screen displays.</i>

Screen	Step/Action
 <p>My Profile — User Preferences Screen</p>	<p>2. Click the Request History link.</p> <p><i>A list of application and maintenance requests display.</i></p> <p>Note: If there are no requests, a message displays indicating there are no requests for this user.</p>
 <p>My Profile — Request History Screen</p>	<p>3. To sort requests, click on header in which you'd like to sort the requests.</p> <p>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.</p> <p>5. 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>

Screen

CITIB COMMERCIAL CARDS

Home

CitiManager

Company

TRAINING USE ONLY - US

Welcome, KATHE...
My Profile | Sign Out

✉

citi

HOME / MY PROFILE:REQUEST HISTORY /

Request History

1

View Requests. Fields marked with the (\$) symbol are not real time fields. Fields marked with (\$) indicate a previous maintenance request has been submitted but not yet processed.

Request Details

Request ID	Current status	LAST MODIFIED DATE	Form ID
6181143766	Processed	10/14/2020 01:06:38	37181

TS2_IOLM Long Form

IOLM

FIRST NAME
KATHERINE

LAST NAME
GEORGENSON

BUSINESS PHONE
8314772100

HOME PHONE \$

>> Update Master Accounting Code

ORDER A REPLACEMENT CARD ☐

CELL PHONE POLICY
As a service, Citi may notify you about important updates to your Account via an automated dialing system, pre-recorded messages and/or SMS text messages to your wireless device. Examples might include notification of returned mail or suspected fraud on your account. The typical wireless charges may apply from your wireless carrier; however, there is no charge from Citi. Should you provide us with your mobile number at any time, you agree that Citi may use your mobile number to contact you. Should you prefer to not receive these notifications on your wireless device, you may opt out by emailing the Bank at optoutcellconsent@citi.com.

TS2_IOLMLong Form

Approval History

ACTION	DATE/TIME	APPROVER	RE-APPLY	DESCRIPTION
Approved	10/14/2020 01:06:39	Donna Obarski		

VIEW AUDIT LOG

VIEW ACCOUNT DOCUMENTS

CANCEL

Step/Action

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.

Request Details Screen

CITIB COMMERCIAL CARDS

Home

CitiManager

Company

TRAINING USE ONLY - US

Welcome, KATHE...
My Profile | Sign Out

✉

citi

HOME / MY PROFILE:REQUEST HISTORY /

View Audit Log

1

View applications and maintenance request audit history.

Viewing 1-10 of 14 | < | 1 | 2 | >

Date & Time Of Change	Changed By	Type Of Update	Updated Field	Old Value	New Value	Messages	FIELD STATUS
10/14/2020 01:06:43 PM	SYSTEM	Status	NA		Processed		
10/14/2020 01:06:39 PM	demots2	Status	First Name	KATHERINE	Approved		

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.

