CitiManager® Site User Guide

Cardholder

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User Guide Overview

Document Scope

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

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

Your Access May Vary

The functions you have access to are based on your role and entitlements. You may not have entitlements for all the functions described in this user guide. Some fields are defined at the company level so there may be variances in what is described in this user guide based on your company's setup.

A Note About Navigation

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

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

Getting Started in CitiManager

What is CitiManager?

Description

The CitiManager Site is a powerful online tool that allows Cardholders to view and manage their account at any time. Based on your company's set up, some of the key self-service activities may include:

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

For companies that have the Registration ID and Passcode feature turned on, the CitiManager Site will send you Registration ID and Passcode e-mails once activity is recorded on your Cardholder account. Once received, you can complete the CitiManager Site self-registration process to access your account details.

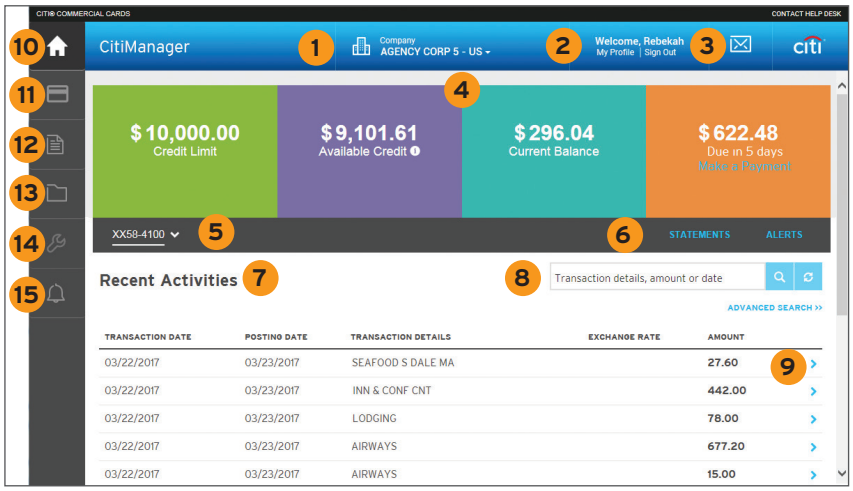
Basic Navigation

Key Concepts

After you log in to the CitiManager Site, the **Home** screen displays. The Home screen acts as a dashboard and displays a high level metric summary of your account – including your credit limit, total balance and available credit. You can also view recent transactions that have posted since your last statement. Use the navigation options from the header and the side navigation bar as well as quick links to navigate to additional account information and preferences.

Home Screen

Screen



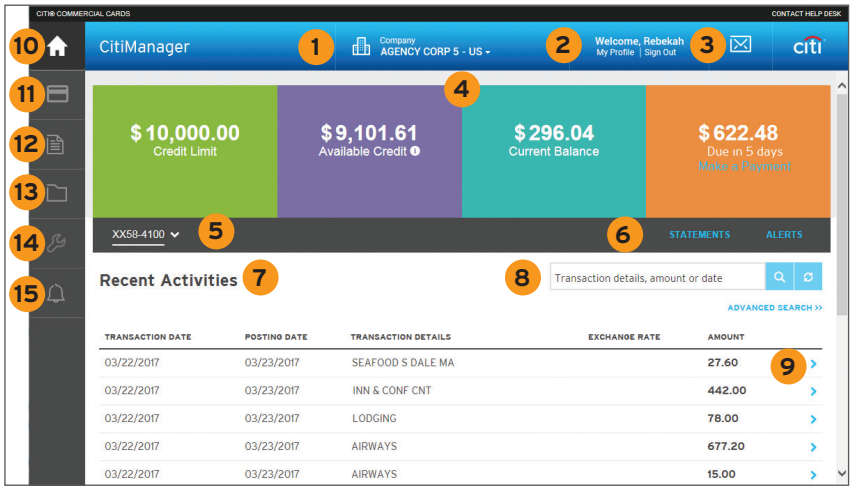
Descriptions

Header

1. View your company. If you have access to more than one, you may select it using the drop-down list.
2. Access **My Profile** functions or sign out of the CitiManager Site.
3. View the **Message Board**.

Screen Components

4. View high-level account metrics such as credit limit, available credit, current balance and amount due. If your organization allows you to make payments, the **Make a Payment** link displays. For centrally billed accounts, the amount due by your company displays.
5. Use the account drop-down arrow to toggle between card accounts if you have more than one.
6. Use the quick links to navigate to the **Statements** and **Alerts** screens.
7. View list of transactions that posted since your last statement.
8. Use the search field to perform a basic transaction search by the details, amount or date or click the **Advanced Search** link to narrow your search.
9. Click the **> Forward** arrow to navigate to the **Statements** screen.

Screen	Descriptions
	**Side Navigation Bar** 10. Click the **Home** button to return to the **Home** screen. 11. Click the **Cards** button to view an overview of your card account, payment information, statements, aging of balance, recent transactions and your card contact information. 12. Click the **Statements** button to select a monthly statement to view and also view recent activity, change your paperless settings and view disputes. 13. Click the **Resources** button to view messages, access FAQs and Links & Help. 14. Click the **Tools** button to navigate to other online tools if you have access. 15. Click the **Alerts** button to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.

Choose Your Language

Key Concepts

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

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **Choose your language** drop-down list, select the desired language. *The CitiManager Site text displays in the selected language.*

Apply for New 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

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click the **Apply for Card** link. *The User Registration screen displays.*
3.	Select the **Invitation Passcode** radio button. *The Apply for Card – Password Verification screen displays.*
4.	Click the **Continue** button. *The Passcode Verification screen displays.*
5.	In the **Invitation Passcode** field, type the Invitation Passcode sent to you by your Program Administrator.
6.	In the **Inviter's E-mail Address** field, type the inviter's e-mail address sent to you by your Program Administrator.
7.	Click the **Continue** button. *The User Registration screen displays.*
8.	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. An **X** displays until the requirement is fulfilled.
9.	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. An **X** displays until the requirement is fulfilled.
10.	In the **Confirm password** field, re-type the password.
11.	From the **Helpdesk verification** question drop-down list, select the verification question. **Note:** You may be asked this question by Citi when you contact the Helpdesk for assistance.

Step	Action
12.	In the **Helpdesk verification** answer field, type the answer to the verification question you selected.
13.	In the **Personal Information** section, complete the required fields. **Note:** An asterisk (*) indicates a required field.
14.	Click the **Continue** button. *A confirmation message displays.* **Note:** The CitiManager Site sends an e-mail confirming the registration and username created.
15.	Click the **OK** button. *The Country and Language screen displays.*
16.	The **Select country** and **Select language** fields should be pre-populated based on what was entered in the **User Profile** screen. **Note:** Only the countries selected by your company display in the drop-down list. A link displays at the bottom of the screen for Canadian users directing them to the Canadian Privacy Statement.
17.	Click the **Continue** button. *The Card Application Details screen displays.*
18.	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.
19.	Click the **Submit** button. *An application submission confirmation message displays.*
20.	Click the **OK** button. *The CitiManager Site Login screen displays.* **Note:** The approving Supervisor or Program Administrator will receive an e-mail advising them that your application is awaiting their approval.

Apply for New Card Using a System Passcode – Federal Government

Key Concepts

Before you can apply for a new card, a CitiDirect® System Client Code and Application Passcode are required. Both are obtained from you're A/OPC.

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 your A/OPC.

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

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

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click on the **Apply for Card** link. *The User Registration screen displays.*
3.	Select the **CitiDirect System Client Code** radio button.
4.	Click the **Continue** button. *The CitiDirect system client code screen displays.*
5.	In the **CitiDirect system client code** field, type the CitiDirect System Client code sent to you by your A/OPC.
6.	Click the **Continue** button. *The application requirements screen displays.*
7.	Your hierarchy displays in the unit field. Type the passcode provided by your A/OPC in the **Code** field and your employee ID in the **Employee ID** field.
8.	Click the **Continue** button. *The Online Application screen displays.*
9.	Click the **Online Application** tab. *A sub-menu displays containing the Card Application option.*
10.	Click the **Card Application** option. *The Online Application screen displays.*
11.	Complete the required fields on the application screen. **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 **Continue** button. *A Status Note window displays.* **Note:** In the **Comments** section you can type your reason for applying. This is not a required step.
13.	Click the **Submit** button. *The Online Application-Confirm Screen displays.* **Note:** The approving Supervisor or A/OPC will receive an e-mail advising them that your application is awaiting their approval.

Self-register as a Cardholder

Key Concepts

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

There are two possible self-registration options for Cardholders. The option used is based on your organization's setup. You will use one of the following options:

- **Registration ID and Passcode** – If your organization uses this option, Citi will send you two e-mails once a transaction has posted to your account. You will receive one e-mail with your Registration ID and another with your Registration Passcode. These e-mails are required during the registration process. Once you receive your registration details, you must register within 60 days or your details will expire. You will be reminded every 15 days until your registration is complete.
- **Card Details** – Use the details from your card account. You will need your card number, account name and address. The account name, address and zip code must match exactly what appears on your billing statement.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click the **Self-registration for Cardholders** link. *The Self-registration for Cardholders screen displays.*
3.	Select the **Registration ID/Passcode** radio button and proceed to Step 4, OR Select the **Fill the card's data** radio button and proceed to Step 8.
4.	Click the **Continue** button. *The Self-registration for Cardholders registration screen displays.*
5.	In the **Registration ID** field, type the Registration ID supplied in the e-mail sent from the CitiManager Site.
6.	In the **Registration Passcode** field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site.
7.	Click the **Continue** button and continue to Step 12. *The Sign-on details screen displays.*
8.	In the **Card number** field, type your card number exactly as it appears on your billing statement, no spaces or dashes.
9.	In the **Account name** field, type the account name exactly as it appears on your billing statement.

Step	Action
10.	In the **Contact details** section, type the billing address for your card exactly as it appears on your billing statement. **Note:** If your zip code is nine digits, then enter all nine digits. If your zip code is only five digits, then only enter five digits. An asterisk (*) indicates a required field.
11.	Click the **Continue** button. *The Sign-on details screen displays.* **Note:** A link displays at the bottom of the screen for Canadian users directing them to the Canadian Privacy Statement.
12.	In the **Username** field, type your desired username. **Note:** The username requirements display in a window as you type your username. An **X** displays until the requirement is fulfilled.
13.	In the **Password** field, type and confirm a password that meets the requirements. **Note:** The password requirements display in a window as you type your password. An **X** displays until the requirement is fulfilled.
14.	In the **Confirm password** field, re-type the password.
15.	In the **Contact details** section verify the information displayed is correct and make any necessary changes.
16.	Complete the rest of the fields on the screen and when you are finished, click the **Continue** button. *The Recap screen displays.*
17.	Review the information displayed and when you are finished, click the **Confirm** button. *The Confirmation message screen displays.*
18.	Click the **OK** button. *The CitiManager Site Login screen displays.* **Note:** Use the username and password you created to login to the CitiManager Site. When you log in for the first time, you will be asked to select and answer three challenge questions. Each time you log in, you will be asked to answer one of the challenge questions.

Login to the CitiManager Site

Key Concepts

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

As an additional layer of security, you may be required to enter a one-time passcode (OTP) during the login process. The CitiManager Site will assess the risk based on your previous login history. This additional step of authentication will not be necessary for every login.

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

If you need additional information about CitiManager Site self-registration, refer to the **Self-register as a Cardholder** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	In the **Username** field, type your username.
3.	In the **Password** field, type your password.
4.	Click the **Login** button. *The Challenge Question screen displays.* **Note:** When you log in to the Citi Manager Site for the first time you must select and answer three challenge questions. Each time you log in, you will be asked to answer one of the challenge questions. If the system determines it necessary, the One-time Passcode receipt option screen displays. Select how you would like to receive your one-time passcode (the text option is recommended provided your mobile phone number is current in your profile) and click the **Continue** button. When the eight-digit code is received, type it in the field displayed on the CitiManager Site **One-time Passcode** screen and click the **Continue** button. The one-time passcode expires after five minutes (300 seconds).
5.	Answer the challenge question and click the **Continue** button. *The CitiManager Site Home screen displays.* **Note:** You have three attempts to answer the challenge question correctly.

Log Out of the CitiManager Site

Key Concepts

When logging out of the CitiManager Site, be sure to use the **Sign Out** link so the system closes all your current session information properly.

Do not close the CitiManager Site by clicking the browser or tab **Close [X]** button. Even though the browser/tab closes, your session remains open. You will either need to clear your cache or close your browser to end the session.

You will be automatically logged out of the CitiManager Site after 15 minutes of inactivity. If you receive an expiration warning message, you can click the **OK** button to keep your session open.

Step-by-Step Instructions

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

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 full account number
- The embossed name as it appears on your card

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	Click the **Forgot username?** link. *The Forgot sign on – username screen displays.*
3.	Select the **Cardholder** role radio button.
4.	In the **Embossed Name** field, type the embossed name as it appears on your card.
5.	In the **Account Number (full number)** field, type the full account number as it appears on the card.
6.	In the **Enter the code in image** field, type the CAPTCHA displayed in the shaded image. **Note:** To listen to the CAPTCHA code, select the **Select Audio Challenge** checkbox and click the **Play Audio** button.
7.	Click the **Continue** button. *The Challenge question screen displays.*
8.	In the challenge question answer field, type the answer to the challenge question. **Note:** You have three attempts to answer the challenge question correctly.
9.	Click the **Continue** button. *The system sends your username to the e-mail address on file.*

Reset Forgotten Password

Key Concepts

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

To retrieve your password, the following information is required:

- A valid username
- The last six digits of your account number

Step-by-Step Instructions

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	Click the **Forgot password?** link. *The Forgot password screen displays.*
3.	Select the **Cardholder** role radio button.
4.	In the **Username** field, type your username.
5.	In the **Account number** field, type the last six digits of your account number.
6.	In the **Enter the code in image** field, type the CAPTCHA displayed in the shaded image. **Note:** To listen to the CAPTCHA code, select the **Select Audio Challenge** checkbox and click the **Play Audio** button.
7.	Click the **Continue** button. *The Challenge question screen displays.*
8.	In the challenge question answer field, type the answer to the challenge question. **Note:** You have three attempts to answer the challenge question correctly.
9.	Click the **Continue** button. *The Create New Password screen displays.*
10.	In the **New password** field, type a password that meets the password requirements. **Note:** The password requirements display in a window as you type. An **X** displays for each requirement until it has been fulfilled.
11.	In the **Confirm password** field, re-type your new password.
12.	Click the **Save** button. *A confirmation message displays at the top of the screen.*
13.	Click the **OK** button. *The CitiManager Site Login screen displays and your password is reset.*
14.	Use your new password to login to the CitiManager Site.

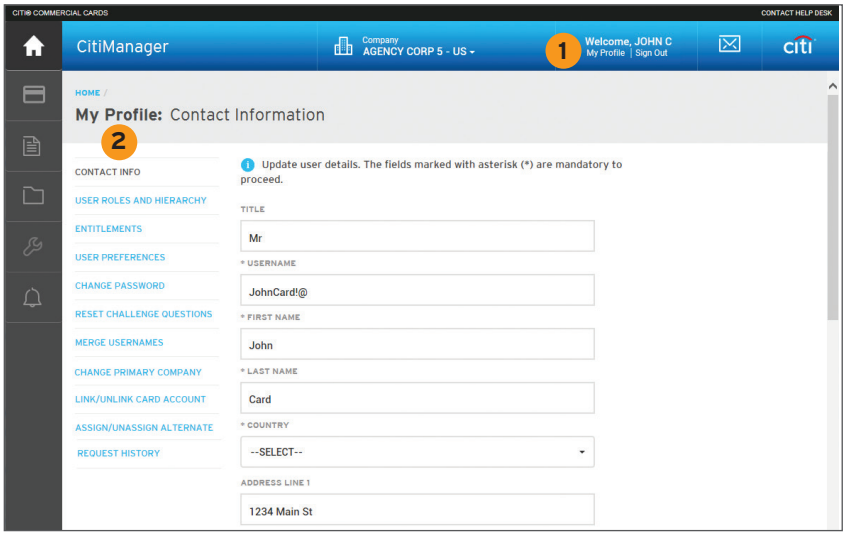
My Profile Overview

Description

The **My Profile** screen allows you to access links that are used to view your user role, hierarchy and entitlements. Additionally, you may update the following depending on your entitlements:

- CitiManager Site contact details
- User preferences such as language, date and time format and currency
- Password
- Reset challenge questions
- Merge CitiManager Site user names if you have more than one
- Change your primary company if you are assigned more than one
- Link/Unlink another card account
- Assign/Unassign Alternate user
- View application and maintenance request history

My Profile Screen

Screen	Descriptions
	1. Click the **My Profile** link from the header to access links used to view and maintain profile information. 2. Click the links that display on the left side of the screen to view and maintain profile information.

Update Contact Information

Key Concepts

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

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

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Update the necessary contact details associated with your CitiManager Site profile. **Note:** An asterisk (*) indicates a required field.
3.	When you are finished, scroll to the bottom of the screen and click the **Save Changes** button. *A confirmation message displays at the top of the screen.*
4.	To view a log of changes that have been made to your contact information, click the **Audit Log** link. *The Audit Log screen displays the date/time of change, previous and current values and the status.*

View User Roles and Hierarchy

Key Concepts

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

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

Step-by-Step Instructions

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

View Entitlements

Key Concepts

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

Entitlements that may be assigned to you include:

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Entitlements** link. *The Entitlements screen displays. By default, all the entitlements you have been assigned display.* **Note:** If you have access to more than one tool, you can select it from the **Application** drop-down list.

Update User Preferences

Key Concepts

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

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

The Help Desk verification question/answer is used to confirm your status with Citi when you call the Help Desk for assistance (Corporate and Federal Government clients, except Department of Defense).

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **User Preferences** link. *The User Preferences screen displays.*
3.	Make any necessary changes to your user preferences. **Note:** An asterisk (*) indicates a required field.
4.	When you are finished, click the **Save Changes** button. *A confirmation message displays at the top of the screen.*

Change Password

Key Concepts

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

Step-by-Step Instructions

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

Reset Challenge Questions

Key Concepts

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

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

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Reset Challenge Questions** link. *The Reset Challenge Questions screen displays prompting you to answer one of your existing challenge questions.*
3.	Type the answer to the existing challenge question displayed.
4.	Click the **Confirm** button. *A confirmation message displays at the top of the screen. The next time you log in to the CitiManager Site, you will be prompted to select and answer three new challenge questions.*

Step	Action
5.	From the CitiManager Site Login screen, type your username and password and then click the **Login** button. *The set security challenge question screen displays.*
6.	Select your three challenge questions from the drop-down list and then type the answer for each. **Note:** You must select three different questions and the answer for each must be unique and have at least three characters. If you enter inaccurate information, click the **Clear** button before saving.
7.	Click the **Save** button. *The CitiManager Home screen displays.*

Merge Usernames

Key Concepts

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

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

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

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
2.	Click the **Merge Usernames** link. *The Merge Usernames screen displays.*
3.	Click the **Start Merge** button. *The Disclaimer screen displays.*
4.	Read the disclaimer information displayed and when finished click the **Continue** button. *The Login screen displays.* **Note:** By clicking the **Continue** button, you are acknowledging that you have read and understand the conditions for merging your usernames.
5.	In the **Alternate username** field, type your alternate username.
6.	In the **Password** field, type the password for the alternate username.

Step	Action
7.	Click the **Continue** button. *The Challenge Question screen displays and you are prompted to answer one of the challenge questions associated with the alternate username you are merging.*
8.	In the challenge question field, type the answer to the challenge question.
9.	Click the **Complete Merge** button. *You are logged out of system and returned to the CitiManager Log In screen*
10.	Log back in to the CitiManager Site using the primary username and all of your permissions will be available from that username.

Change Primary Company

Key Concepts

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

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

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

Step-by-Step Instructions

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

Link Another Card Account

Key Concepts

If you already have a valid CitiManager Site login for an existing card account you can activate additional card accounts without creating another login, username and password.

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

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

- Card Number
- Account Name
- Address

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

Step-by-Step Instructions

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

Unlink a Card Account

Key Concepts

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

Step-by-Step Instructions

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

Assign Alternate User

Key Concepts

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

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

Step-by-Step Instructions

To Assign Existing User

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

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

Step-by-Step Instructions

To Assign a New User

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

Unassign Alternate User

Key Concepts

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

Step-by-Step Instructions

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

It is also possible to download the Online Application Report, which provides a history of the request.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site header, click the **My Profile** link that displays under your name. *The Contact Information screen displays.*
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. You can sort the requests by clicking on header in which you'd like to sort the requests.
3.	To view the hierarchy, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.
4.	To download the Online Application Report: a) Click the **Download** link. *A message displays indicating the report will be cached to your computer.* b) Click the **OK** button to close the message. *The browser document options window displays. The location of the Save or Open options vary based on your browser settings.* c) Either open or save the file to your computer.
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.* **Note:** To view additional information from the **Contact Information, Additional Information, Spending Controls** sections or to view the **CitiManager Cardholder Account Agreement**, click the **+** (expand) button from the section header as necessary. To view the Audit Log, scroll to bottom of screen and click the **View Audit Log** button. When you are finished, click the **Back** button. To return to the list of maintenance requests, click the **Cancel** link at the bottom of the screen then click the **OK** button.

Cards Overview

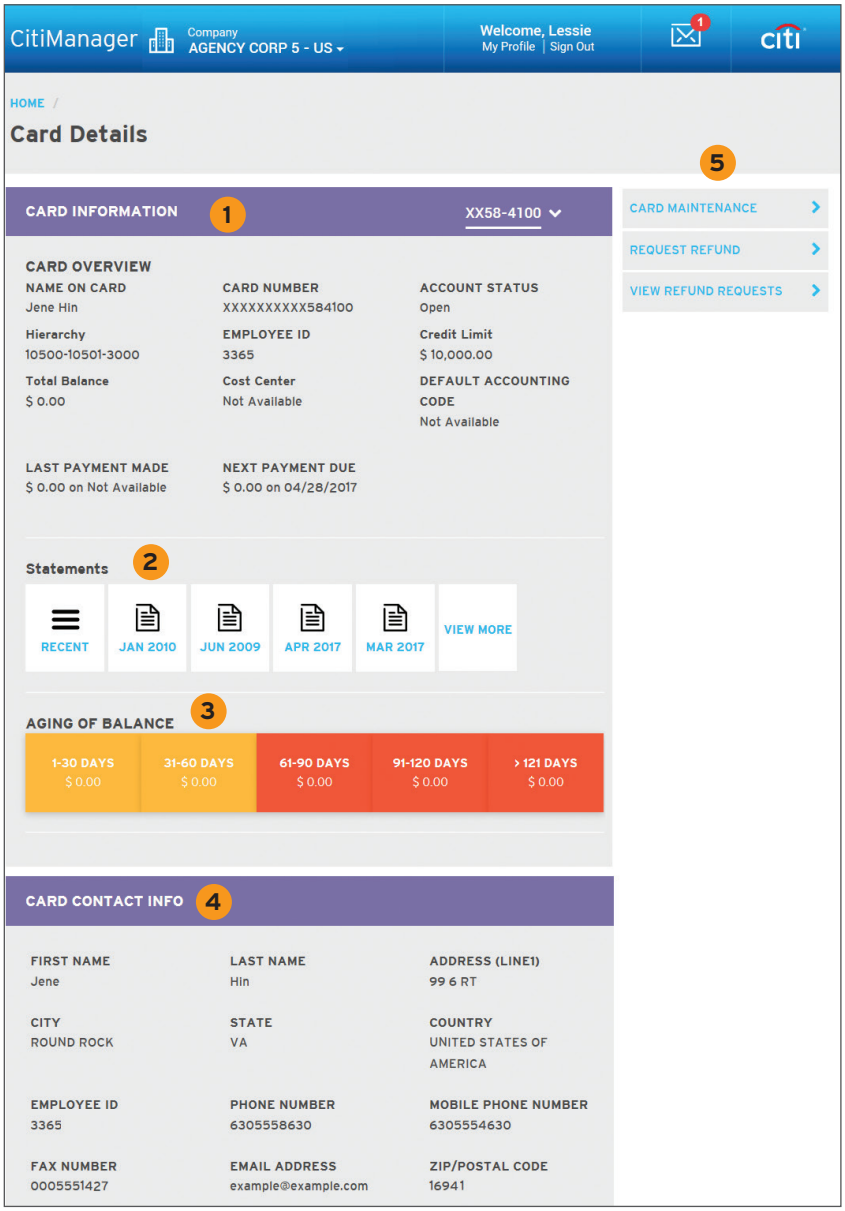
Description

The **Card Details** screen provides a high-level summary of your card account information including the following:

- **Card Overview:** Card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code
- **Payments:** Last payment made, next payment due, view history (if entitled)
- **Statements:** Recent transaction activity, previous statements
- Aging of balance information (1 – 120 Days)
- Contact information associated with your card/statement

Depending on your program and company's settings, you may also be entitled to perform account maintenance, request a refund and view refund requests.

Card Details Screen

Screen	Descriptions
	1. View card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code and payment information. 2. Links to recent transaction activity, and current and previous statements. 3. Aging of balance information (1 – 120 Days). 4. Contact information associated with your card/statement. 5. Links to perform card maintenance and request a refund, if entitled.

View Card Details

Key Concepts

The **Card Details** screen provides a high-level summary of your card account information including the following:

- **Card Overview:** Card name, number and status, hierarchy, employee ID, credit limit, total balance, cost center and default accounting code
- **Payments:** Last payment made, next payment due, view history (if entitled)
- **Statements:** Recent transaction activity, previous statements
- Aging of balance Information (1 – 120 Days)
- Contact information associated with your card/statement

Step-by-Step Instructions

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

Perform Card Maintenance

Key Concepts

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

- Contact Information
- Employee ID

Step-by-Step Instructions

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

Request a Refund

Key Concepts

In order to submit a refund request, you must have this entitlement enabled.

Before a refund can be approved, your eligibility must be verified first by entering the refund amount on the **Check Refund Eligibility** screen. If the amount requested is verified, you can proceed with the request.

The following requirements must be met in order to submit a request online:

- There must be a true credit balance that is the result of you (Cardholder) overpaying your account.
- The refund request must not exceed the current credit balance.
- Disputed transactions cannot be included in the credit balance.
- If you have two or more Non-sufficient Fund (NSF) checks, you cannot request a refund via the Automated Clearing House (ACH) process.

In the following circumstances, you cannot submit a request online. Contact Customer Service for assistance using the number that displays on the back of your card:

- If there was a personal payment or previous online request in the previous 10 business days.
- If your payment history is not in good standing.
- If you require a credit balance refund by check.
- If you require a refund of over $5,000.00.

ACH transfers will take 2–3 business days to process.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** button. *The Card Details screen displays.* **Note:** If you have more than one card account, click the card number link from the **Card Information** header to toggle between accounts.
2.	On the right side of the screen, click the **Request Refund** link. *The Check Refund Eligibility screen displays.*
3.	In the **Refund Amount** field, type the amount of the refund being requested. *The amount entered displays.* **Note:** The decimal is automatically added to the amount entered. You can view any transactions that have not posted by clicking the **View Authorizations** link.
4.	Click the **Check Refund Eligibility** button. *The request is validated based on eligibility criteria and a message displays confirming the refund amount you are requesting. If the eligibility is not confirmed, a message displays describing the reason.*
5.	Click the **OK** button. *The Select Account and Submit screen displays.*
6.	Select the radio button for the account to which you want the refund applied. **Note:** If you are a first-time user, click the **Add** button, enter the required account information including your account type, bank routing number, account number and bank name and then click the **Save** button. You can set an account to be your default account by selecting the radio button for the account in the **Default** column. You can also delete an account that you no longer want to use by selecting the radio button for the desired account and clicking the **Delete** button.
7.	Click the **Submit** button. *The Request Refund – Confirm screen displays.* **Note:** Once you confirm the credit balance refund request, there is no way to cancel or edit the request.
8.	Click the **Confirm** button. *The request is submitted and View Refund Requests screen displays.*

View Refund Requests

Key Concepts

If you have submitted a refund request, you can view the history and status online.

If there are refund requests, a list of requested refunds displays with following information:

- Requested Amount
- Requested Date
- Total Balance
- Status
- Request Type

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, click the **Cards** button. *The Card Details screen displays.* **Note:** If you have more than one card account, click the card number link from the **Card Information** header to toggle between accounts.
2.	On the right side of the screen, click the **View Refund Requests** link. *The View Refund Requests screen displays a list of refund requests.* **Note:** If there are no refund requests, a message displays. Click the **Back** button to return to the previous screen.
3.	To delete a request from the history list, click the **Delete** link for the refund request you wish to delete. *The request is deleted and no longer displays.*

Statements Overview

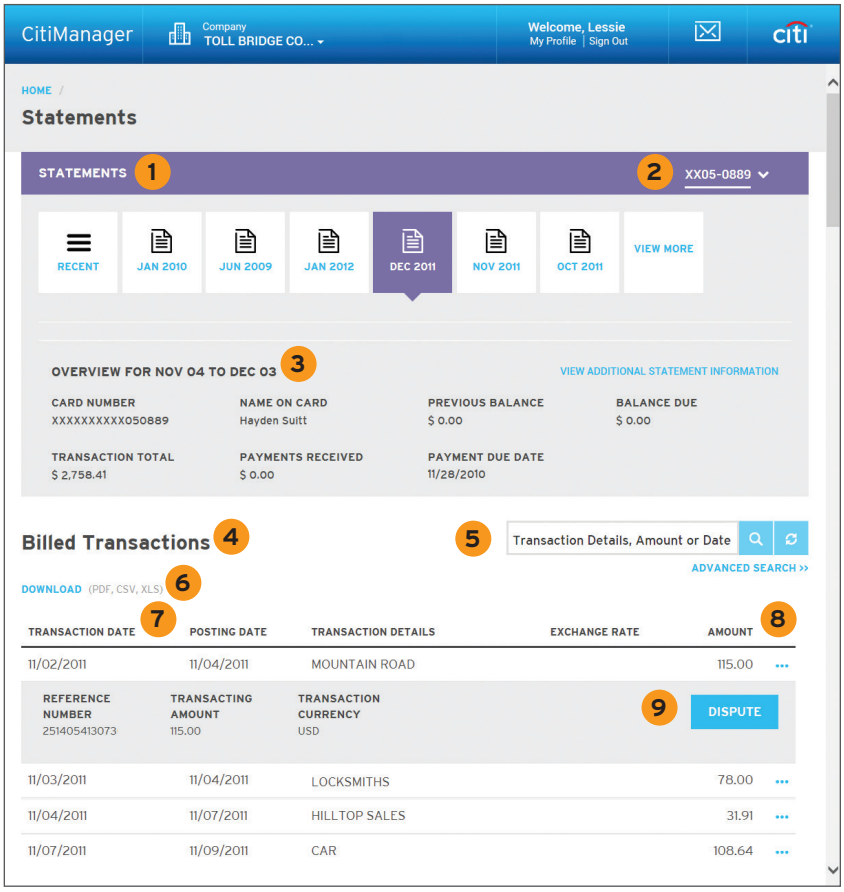
Description

The **Statements** screen displays an overview of your recent transactions, your current statement or a statement from the previous 36 months.

You can also download your statement and dispute a transaction if it billed to your statement within the previous 60 days.

Statements Screen

Screen



Descriptions

1. The **Statements** section displays an overview of your statement and allows you to toggle between statements by clicking the icon for the statement date.
2. If you have more than one card account, use the drop-down arrow to toggle between card accounts.
3. The overview section provides balance and payment information for the dates displayed.
4. A list of billed or recent transactions for the statement displays.
5. Use the search field to perform a basic transaction search by the details, amount or date or click the **Advanced Search** link to narrow your search.
6. Click the **Download** link to download a statement.
7. The list of transactions will display the transaction date, posting date, details and amount.
8. To view additional transaction detail or dispute a transaction, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.
9. Click the **Dispute** button to dispute a transaction. The row must be expanded to view the dispute button.

View and Download Statements

Key Concepts

You can view either your current statement or a statement from the previous 36 months. You can also view recent transactions that have not billed to your statement.

The **Statements** screen displays the following information:

- An account, balance and payment overview
- Declining balance details
- A list of transactions that have billed to your account
- Transaction details

From the **Statements** screen you can also download your statement and dispute a transaction. You can download transactions for individually or centrally billed accounts.

If you wish to print your statement, it's recommended you download it in PDF format. Once the PDF document is open, you can print it by selecting **Print** from the **File** menu.

Step-by-Step Instructions

To View Statements and Transactions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** button and then click the icon for the statement date you wish to view. Use the **Back** and **Forward** (< >) arrows to navigate between years. You can also navigate to your statements from the **Home** screen by clicking the **Statements** link displayed on the right side of the screen or by clicking the icon for the statement date you wish to view from the **Card Details** screen. *The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.* **Note:** If you have more than one card account, click the account number drop-down arrow in the **Statements** header to toggle between accounts. To view transactions that have posted to your account but not yet to your statement, click the **View Recent** link.
2.	To search for a specific transaction amount, date or description, type the search criteria in search field that displays in the upper-right corner of the **Billed Transactions** section and click the **Search** button. Click the **Advanced Search** link to access additional search criteria. *The transactions are filtered by the search criteria entered.*
3.	To view additional transaction detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand. *The row expands and additional transaction details display.* **Note:** The **Dispute** button displays when the row is expanded. For additional information about disputes refer to the **Dispute Transactions** topic in this user guide.

To Download Statements

Step	Action
1.	From the **Statements** screen, click the **Download** link that displays under the **Billed Transaction** header. *The download options display in a new window.*
2.	Select the radio button for the desired download format and click the **Download** button. **Note:** Download options include Comma Separated Value (CSV), Portable Document Format (PDF) or Excel. PDF is the default option. If you intend to print your statement, PDF is the recommended format. *A download message displays stating that the file will be cached to your computer.*
3.	Click the **OK** button. *A message displays at the top of the screen indicating your document is ready for download and the browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
4.	From the browser document option window, click the **Open** button. *The document opens in the selected format.* **Note:** Once the document is open, you can print it by selecting **Print** from the **File** menu.

Make a Payment

Key Concepts

If your organization allows it, you can make an online payment. If paying from a Savings account and/or Credit Union, ensure your financial institution supports automated payments.

Before you can make a payment online you must enter your banking account information. The required information includes:

- Your bank routing number
- Your checking or savings account number

You may choose from the following payment amount options:

- Total amount due
- Minimum amount due
- Specified amount

Payment requests received by 4:00 p.m. Eastern Time (ET) on a bank business day are posted to your Citibank Card account on the same day.

Payment requests received after 4:00 p.m. ET on a bank business day will post the next business day.

Business days are Monday through Friday, excluding federal holidays.

For additional information about viewing your payment history, refer to the **View Scheduled and Past Payments (View Payment History)** topic in this user guide.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** button and then click the **Payments** link. You can also click the **Make a Payment** link that displays on the **Home** screen (under **Due in** date) or on the **Statements** screen (under the **Payment Due Date**). *The Payments screen displays.*
2.	Before you can make a payment online, your banking account information must be entered. If the desired pay from account information already exists, go to Step 7. To add a new pay from account, click the **Add** link from the **Select Payment Account** header. *The Account Information window displays.*
3.	From the **Account Type** drop-down list, select the appropriate pay from account type.
4.	In the **Bank Routing Number** field, type the bank routing code for the account. **Note:** The bank name will automatically populate after you type a valid routing number.
5.	In the **Pay From Account** field, type the account number.
6.	Click the **Save** button. *The new bank account is added.* **Note:** To add another account, repeat Steps 2–6. To delete an existing account, select the radio button for the account and then click the **Delete** link that displays on the right side.
7.	To select the desired pay from account, select the appropriate radio button.
8.	In the **Select Payment Amount** section, select the radio button for the desired payment option. If you selected **Other amount**, type the payment amount in the text entry field.
9.	To schedule a payment in the future, type a date or select it from the calendar.
10.	To submit your payment, click the **Pay** button. *The Confirm Payment screen displays.*
11.	Review your payment information and click the **Confirm** button. *The Success screen displays your payment information and a confirmation displays at the top of the screen.*
12.	Click the **OK** button. *The Scheduled & Past Payments screen displays.*

View and Download Recent Transactions

Key Concepts

Recent unbilled transactions are transactions that have posted to your account but have not yet billed to a statement. The recent unbilled transactions that display will appear on your next statement. The information displayed on the **Recent** screen is not considered a final statement.

You can download transactions for individually or centrally billed accounts.

If you wish to print your recent transactions, it's recommended you download the transactions in Excel format. Once the document is open, you can print it by selecting **Print** from the **File** menu.

Step-by-Step Instructions

To View Recent Transactions

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

To Download Recent Transactions

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

View Authorizations and Declined (Pending) Transactions

Key Concepts

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

Step-by-Step Instructions

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

View Scheduled and Past Payments (Payment History)

Key Concepts

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

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

Step-by-Step Instructions

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

Dispute a Transaction

Key Concepts

You can dispute a transaction when:

- The amount you were billed is incorrect
- There are duplicate charges
- Goods were never received
- Merchandise was defective
- The transaction was paid by other means, usually cash or another card
- The transaction is not recognized

If there has been card misuse/fraud, transactions should not be entered as disputes. A fraud claim should be initiated instead. Examples of misuse/fraud would include transactions that did not meet company policy or when a card was used without consent.

You can initiate disputes from a billed statement on the **Statements** screen or from the **Statements — Recent Activities** screen which displays unbilled transactions.

A disputed transaction must be submitted within 60 days of when the transaction is posted to the account's billing statement.

Multiple transactions are not allowed to be disputed at the same time. Only one dispute per card account is allowed at a time.

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

Note: The steps in the procedure describe how to dispute a transaction from the **Statements** screen. The procedure is the same from the **Statements — Recent Activities** screen.

Step-by-Step Instructions

Step	Action
1.	To navigate to billed transactions, from the CitiManager Site side navigation bar, position your mouse over the **Statements** button and then click the icon for the statement month you wish to view. Use the **Back** and **Forward** (< >) arrows to navigate between years. To navigate to recent activities, from the CitiManager Site side navigation bar, position your mouse over the **Statements** button and then click the **View Recent** link that displays at the top of the fly-out menu. Recent activity also displays on the **Home** screen. Click the **> More** arrow to navigate to the **Statements — Recent** screen. *The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.* **Note:** If you have more than one card account, click the account number drop-down arrow in the **Statements** header to toggle between accounts.
2.	To initiate a dispute for a transaction, click the ellipsis (...) link that displays on the right-side of the transaction you wish to expand. *The row expands and additional transaction detail and the Dispute button display.*
3.	From the expanded row, click the **Dispute** button. *The Dispute Transactions — Dispute details screen displays.* **Note:** Multiple transactions are not allowed to be disputed at the same time. If the transaction selected does not fulfil the dispute rules a message displays indicating you should contact Customer Service for assistance.
4.	From the **Dispute Reason** section, select the dispute reason from the drop-down list. **Note:** You must select a dispute reason to continue. Only one reason can be selected. Depending on the dispute reason selected, you may be required to provide additional information such as an amount.
5.	Select the verification checkbox to certify the information provided is accurate.
6.	Click the **Continue** button to validate your dispute. *If the validation is successful, the Dispute Transactions — Review screen displays.* **Note:** If the validation fails, the "Please fill out the required fields for the dispute reason selected. If unable to provide detail required, please contact Customer Service to initiate a dispute." message displays.
7.	Review the dispute details, reason code and additional information and click the **Submit** button. *The Dispute Transactions — Confirmation screen displays indicating if the dispute was successfully initiated.*
8.	If the dispute reason you selected indicated a requirement to fax or mail additional dispute information, click the **Download Dispute** form button and follow the instructions on the form. **Note:** To return to the statement, click the **Return to Statement/Unbilled Transaction** link.

View Disputed Transactions

Key Concepts

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

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

Step-by-Step Instructions

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

Go Paperless

Key Concepts

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

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

You must sign up to receive an e-mail alert that will notify you when a new statement is available. An e-mail is sent to the account e-mail address when the statement is ready to be viewed in the CitiManager Site. You can set your alerts by positioning your mouse over the **Alerts** button from the side navigation bar and clicking the **Alerts** link. Refer to the **Set E-mail and Mobile Alerts** topic in this guide for additional information.

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

To receive your paper billing statement again, use the **Opt Out** screen and cancel your request to only receive online statements.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Statements** button and click the **Go Paperless** link. *The Go Paperless screen displays.*
2.	To stop receiving paper statements and other account notices, select the checkbox.
3.	Click the **Terms and Conditions** link and review the terms and conditions associated with opting out of paper statements and then click the **I Agree** button. *A message displays asking you confirm the e-mail address on the account.*
4.	Click the **Yes** button to confirm your e-mail address. If you wish to change the e-mail address, click the **No** button and follow the instructions for navigating to the **Alerts** screen to update your e-mail address. Click the **OK** button to close the message. *The Online Payment Options message displays indicating you can continue to set up online payment options.*
5.	Click the **Continue to Make Payment** button to navigate to the **Make a Payment** screen and set up your payment options. Refer to the **Make a Payment** topic in this user guide for additional information. Click the **Cancel** link to continue without setting up your payment options. *A confirmation message displays at the top of the screen.*

Resources

View Message Board

Key Concepts

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

Step-by-Step Instructions

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

Search for a Non-cardholder (Program Administrator)

Key Concepts

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

- Hierarchy Name
- Role
- Full Name
- User Profile E-mail Address
- Contact No. 1
- Contact No. 2
- Full Address

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** button and then click the **Search** link. *The Search screen displays.*
2.	To perform a basic search, type the name or username of the Non-cardholder and click the **Search** icon, OR To perform an advanced search, click the **Advanced Search** link. To search by **Role** and **Hierarchy Name**, click the **More Options** link. Enter your search criteria and click the **Search** button. *The search results display based on the search criteria entered.* **Note:** To view the **Full Address** for the Non-cardholder, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.

View Frequently Asked Questions

Key Concepts

The CitiManager Site Frequently Asked Questions (FAQ) documents contain answers to some of the most commonly asked questions. It includes information about Cardholder registration, passwords, security questions, alerts and quick tips.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** button and then click the **FAQs** link. *The View FAQ screen displays.*
2.	Click the **NA CitiManager FAQ** link or other available document. *A message displays indicating the downloaded file may be cached to your computer.*
3.	Click the **OK** button to close the message. *The browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
4.	Click either the **Save** or **Open** option. *The selected document opens in Portable Document Format (PDF) or the Save options window opens.*

Access Links & Help

Key Concepts

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

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Resources** button and then click the **Links & Help** link. *The Links/Help screen displays.*
2.	Click the link for the resource you wish to access. *A message displays indicating you will be opening an external link.*
3.	Click the **OK** button. *Depending on the type of resource selected, either the website will open or a message displays indicating the selected document will be cached to your computer's hard drive.* **Note:** When you click on a link for an external site, a new browser opens and you will be directed to the selected site. You will still be logged into the CitiManager Site.
4.	If a document was selected, click the **OK** button to close the message. *The browser document option window displays. The location of the Save or Open options vary based on your browser settings.*
5.	Click either the **Save** or **Open** option. *The selected document opens in Portable Document Format (PDF) or the Save options window opens.*

Web Tools

Access Web Tools

Key Concepts

If you have been granted access to CitiDirect Card Management System (CCMS) or Global Card Management System (GCMS), you can access them from **Web Tools**.

Step-by-Step Instructions

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

Alerts

Manage Alert Subscriptions

Key Concepts

As a Cardholder, you can set alerts so notifications are automatically sent via e-mail and/or to your mobile device when certain selected activity occurs on your account, for example, when statements are available and when payments are received.

There are two types of alerts to which you can subscribe:

- **Transactional Alerts** – An alert is sent when a defined condition or threshold is met, for example an alert is triggered when a payment is received or when a defined percentage of your credit limit is met.
- **Account Alerts** – An alert is sent when there are status changes to your account, for example when your address is changed or when your statement is available.

It is possible to enter up to five e-mail addresses and customize when you will receive your alerts based on:

- Time zone
- Time of day
- Days of week

Once you have subscribed to mobile alerts in the CitiManager Site, you will receive a confirmation text message on your mobile device with a four-digit PIN. The four-digit PIN must be entered on the PIN confirmation number screen in the CitiManager Site. Once the PIN has been entered, the CitiManager Site will send another text to your mobile device confirming activation. The confirmation text message is sent any time you change or enter a new mobile phone number.

On-Demand Mobile Alerts

In addition, once you have registered your mobile device number in the CitiManager Site, you have full access to on-demand mobile alerts. On-demand mobile alerts allow you to request and receive immediate information such as account balances, payment amounts and due dates. Refer to the **Manage On-demand Mobile Alerts** topic in this user guide for additional information.

Step-by-Step Instructions

Step	Action
1.	From the CitiManager Site side navigation bar, position your mouse over the **Alerts** button and then click the **Alerts Subscription** link. *The Alerts Subscription screen displays.*
2.	To enter/edit the e-mail address(s) where you want alerts sent, click the **Email Addresses – Edit** link and complete the following steps when the **Email Address Preferences** window opens: a) Type and confirm up to five e-mail addresses. b) Click the **Save** button.

Step	Action
3.	To edit your mobile number, your mobile carrier, and your notification preferences, click the **Mobile Phone Number — Edit** link and complete the following steps when the **Mobile Number Preferences** screen opens: a) In the **Country Code** and **Mobile Number** field, type a valid mobile phone number where you wish alerts to be sent. **Note:** Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile. b) Click in the **Supported Carriers** field and select your mobile carrier. **Note:** If Sprint is your carrier, you are automatically enrolled in this subscription notification. This is a requirement of Sprint. Canadian users are automatically enrolled in this subscription due to regulations in Canada. c) Click in the **Preferred Time Zone** field and select your preferred time zone. d) Click in the **From** and **To** fields and select the time-frame in which you would like to receive alerts. e) From the list of weekdays, select the days you would like to receive alerts. f) Click the **Save** button.
4.	To subscribe to alerts, select the **Email Alerts** and/or **SMS (Mobile Alerts)** checkbox(es) for each of the alerts you wish to receive. To unsubscribe to alerts, deselect the **Email Alerts** and/or **SMS (Mobile Alerts)** checkbox(es) for the alerts you no longer wish to receive. **Note:** Some alerts may be greyed out and unavailable. Available alerts are set by your Program Administrator. Alerts that are selected and greyed out are mandatory. For more information about each alert, click the information icon next to the alert name. Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the **Available Credit Remaining %** alert, you must select the desired **Available Credit Remaining %**. When the selected percent of remaining credit level is met, you will receive an alert.
5.	When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox. **Note:** If you do not agree to the terms and conditions, you will not be able to receive alerts.
6.	Click the **Save** button. *The alerts settings are saved and a confirmation message displays at the top of the screen. The PIN confirmation number screen displays if you elected to receive alerts on your mobile device for the first time or you changed your mobile phone number.* **Note:** If you elected to receive alerts on your mobile device, you will receive a text message with a PIN. On the CitiManager Site **PIN confirmation number** screen, type the PIN number received on your mobile device in the **PIN confirmation number** field and click the **Confirm** button.

View Alert Audit Log

Key Concepts

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

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

Step-by-Step Instructions

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

Manage On-Demand Mobile Alerts

Key Concepts

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

Once you have registered your mobile device number in the CitiManager Site, you have full access to on-demand mobile alerts. On-demand mobile alerts allow you to request and receive immediate information such as account balances, payment amounts and due dates.

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

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

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

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

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

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

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

efficiency, renewable energy & mitigation

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