

# CitiManager® Site Upgrade Transition User Guide

July 2018

# Table of Contents

Introduction .....	2	Manage Card Program.....	11
Login Screen.....	3	My Profile .....	12
Home Screen .....	4	Resources.....	13
Searches .....	6	Web Tools .....	14
Manage Users.....	7	Alerts.....	15
View and Manage Card Accounts .....	8	Bulk Online Applications/Bulk Online Maintenance.....	17
View Statements and Transactions.....	9	Navigation Quick Reference .....	18
Manage Application and Maintenance Requests .....	10		

---

# CitiManager® Site Upgrade Transition Reference Document

## Introduction

At Citi, we're always focused on improving convenience and increasing efficiency and our latest CitiManager® Site release updates the interface for Non-cardholders with an all-new look and feel.

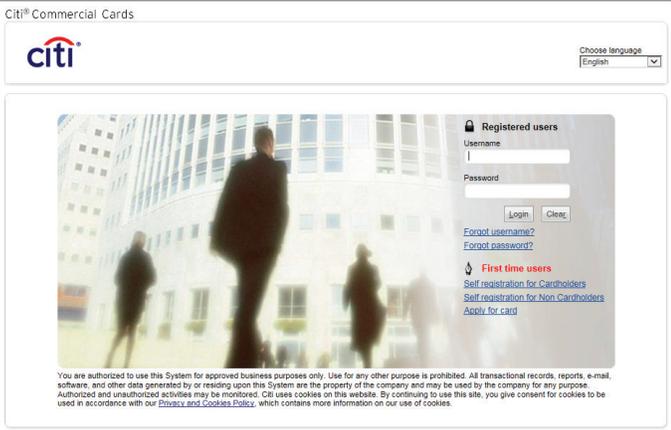
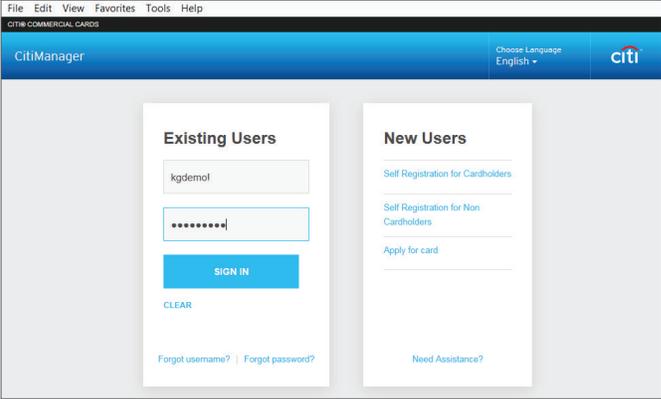
All the functions you currently use are still available. However, navigation and workflows are more streamlined, and managing Cardholders will be easier than ever.

This overview document will assist with your transition by mapping how you previously navigated to functions in the CitiManager Site and how to access them in the new interface.

For detailed steps on how to perform CitiManager Site functions highlighted in this transition document, refer to the **CitiManager Non-cardholder Quick Start Guide** or the **CitiManager Non-cardholder End-to-End User Guide**. To access these guides, log in to the **CitiManager** Site and from the side navigation bar, click the **Web Tools** icon and select the **Learning Center** link.

## Login Screen

Navigate to the CitiManager **Login** screen to access the CitiManager Site. From this screen you can also choose your language before you log in, retrieve a forgotten username, reset your password, and self-register as a Non-cardholder.

CitiManager (Previously)	CitiManager (Now)
<p><b>Navigation:</b> www.citimanager.com/login</p> <p><b>CitiManager Site Login Screen</b></p> 	<p><b>Navigation:</b> www.citimanager.com/login</p> <p><b>CitiManager Site Login Screen</b></p> 

## Home Screen

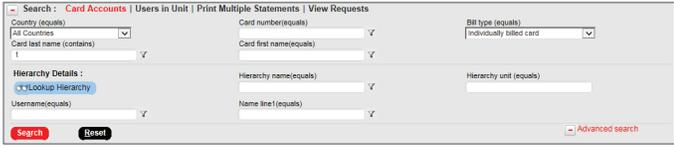
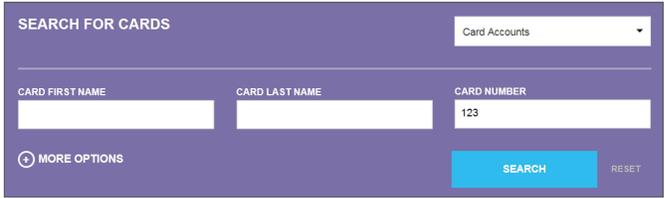
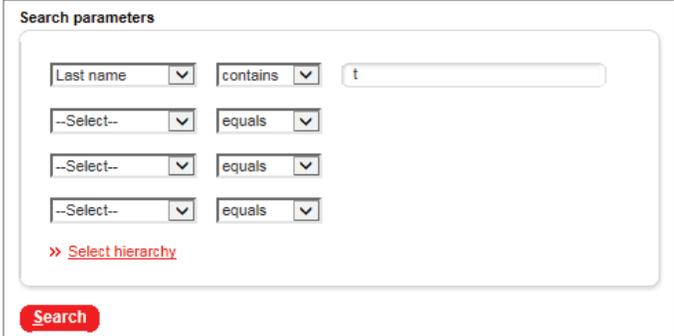
After you log in to the CitiManager Site, the **Home** screen displays. The **Home** screen acts as a dashboard and displays a high level metric summary of your program – including outstanding requests, accounts overdue, total credit remaining, number of un-activated cards and recent activity.

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

Screen	Descriptions
<p><b>CitiManager Site Login Screen</b></p> <p>The screenshot displays the CitiManager Site Login Screen. At the top, there is a header with a home icon (11), company selection (1), a search bar (6), and user profile options (2, 3, 4, 5). The main dashboard features four key metrics: 24% Outstanding Requests (17,307/4,208), 260 Accounts Overdue with \$1,000.00 Total Credit Remaining, 1% Unactivated Cards (7,498), and \$433,575.59 Total Recent Activity. Below these are quick links for creating a user, applying for a new card, alerts, and setting a passcode. Two tables of pending requests are shown: Application Requests (9) and Maintenance Requests (10). A side navigation bar on the left contains icons for Home (11), Manage Users (12), Manage Card Program (13), Resources (14), Tools (15), and Alerts (16).</p>	<p><b>Header</b></p> <ol style="list-style-type: none"> <li>1. View your company. If you have access to more than one, you may select another company by selecting it from the drop-down list.</li> <li>2. Access <b>My Profile</b> functions or sign out of the CitiManager Site.</li> <li>3. View the <b>Message Board</b>.</li> <li>4. Contact the Help Desk for assistance.</li> <li>5. If you have both Cardholder and Non-cardholder access to the CitiManager Site you can toggle between both using the drop-drop list.</li> </ol> <p><b>Screen Components</b></p> <ol style="list-style-type: none"> <li>6. Complete a search by typing a name or card account number and then select an action from the drop-down list such as <b>Card Accounts</b> or <b>View Requests</b>.</li> <li>7. View high-level account metrics such as outstanding requests, accounts overdue, total credit remaining, percent un-activated cards and total recent activity.</li> <li>8. Use the quick links to create a user, apply for new card, set your personal alerts and set passcode.</li> <li>9. View a list of pending <b>Application Requests</b> that are waiting for your review.</li> <li>10. View a list of pending <b>Maintenance Requests</b> that are waiting for your review.</li> </ol> <p><b>Side Navigation Bar</b></p> <ol style="list-style-type: none"> <li>11. Click the <b>Home</b> icon to return to the <b>Home</b> screen.</li> <li>12. Click the <b>Manage Users</b> icon to view card account details, view recent and billed statements, perform account maintenance, view requests, view refund history, perform a user search, print multiple statements, view disputes, view hierarchy, create a user and assign/unassign applications.</li> <li>13. Click the <b>Manage Card Program</b> icon to complete a new account applications, run reports, and set passcodes.</li> <li>14. Click the <b>Resources</b> icon to view messages, access FAQs and Links &amp; Help.</li> <li>15. Click the <b>Tools</b> icon to navigate to CitiManager – Reporting, CitiManager – Transaction Management or CitiManager – Expense Management if you are entitled and also the Learning Center.</li> <li>16. Click the <b>Alerts</b> icon to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.</li> </ol>

## Searches

The process of performing searches has been streamlined so you no longer have to select filters to change the qualifiers such as **equals**, **starts with**, **ends with** and **contains**. Instead, you can simply type full or partial search criteria into the desired field without selecting a qualifier. You can choose a basic search or click the **More Options** button for additional search options. Up to 1,000 results can be returned before you have to further refine your search.

CitiManager (Previously)	CitiManager (Now)
<p><b>Search Options</b></p> 	<p><b>Search Options</b></p> 
<p><b>Search Parameters</b></p> 	

## Manage Users

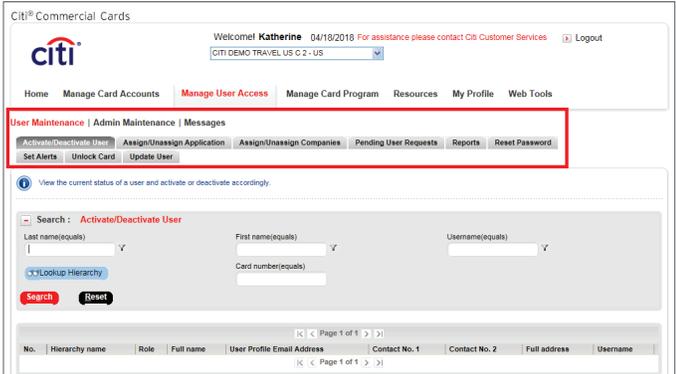
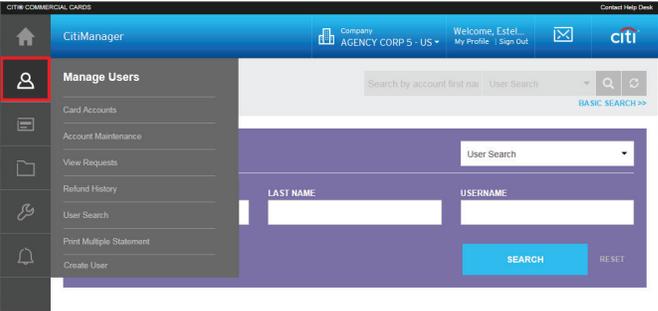
To view and manage card accounts and users, click the **Manage Users** icon from the side navigation bar.

Click the **Card Accounts** link to view card accounts, disputes, hierarchies, modify alerts received by the cardholder, view and download statements and transactions (billed and recent) and dispute a transaction.

Click the **View Requests** link to view/approve/deny application and maintenance requests.

Click the **User Search** link to reset a user's password, activate/de-activate a user, update a user's personal and contact details, roles, hierarchy and entitlements. You can also assign/unassign companies.

You can also click the appropriate links to perform account maintenance, view refund history, print multiple statements and create a user.

CitiManager (Previously)	CitiManager (Now)
<p><b>Navigation: Manage User Access Tab</b></p> <p><b>User Maintenance Options</b></p>  <p>The screenshot shows the 'Manage User Access' tab selected in the navigation bar. Below it, a menu titled 'User Maintenance Options' is highlighted with a red box, containing links for 'Activate/Deactivate User', 'Set Alerts', 'Unlock Card', 'Update User', 'Assign/Unassign Application', 'Assign/Unassign Companies', 'Pending User Requests', 'Reports', and 'Reset Password'. Below the menu is a search form for 'Activate/Deactivate User' with fields for last name, first name, and username, and a table with columns for hierarchy name, role, full name, email address, and contact information.</p>	<p><b>Navigation: Manage Users Icon</b></p> <p><b>Manage Users Options</b></p>  <p>The screenshot shows the 'Manage Users' icon highlighted in the side navigation bar. The main content area displays a 'Manage Users Options' menu with a search bar and fields for 'LAST NAME' and 'USERNAME', along with 'SEARCH' and 'RESET' buttons.</p>

## View and Manage Card Accounts

You can view and manage card account information from the **Card Details** screen. You can view a card overview, payments, aging of balance and card contact information. You can also navigate to recent transactions and previous statements. It is also possible to view disputes and hierarchy information and update alerts for the card account.

### CitiManager (Previously)

Navigation: Manage Card Accounts Tab > Card Accounts > Search > Manage Account Button

#### Card Accounts Screen

### CitiManager (Now)

Navigation: Manage Users Icon > Card Accounts Link > Search Card Details Screen

## View Statements and Transactions

From the **Statements** screen, you can navigate to current or previous statements and view transactions. You can also view recent transactions (unbilled) for a card account that have posted to the account but have not yet been billed to a statement. The **Statements** screen displays a snapshot of credit limits, balances, payments posted, pending authorizations and due dates. A list of transactions display and you can expand each row to view additional detail that may have been sent to Citi from a merchant and also dispute a transaction if it is eligible.

### CitiManager (Previously)

**Navigation:** Manage Card Accounts Tab > Card Accounts > Search > Manage Account Button > Statement or Unbilled Transactions Tabs

#### Statements Screen

### CitiManager (Now)

**Navigation:** Manage Users Icon > Card Accounts Link > Search > Card Details > Recent or Statement Date Icon

#### Statements Screen

## Manage Application and Maintenance Requests

You can view all online applications and maintenance requests submitted through the CitiManager Site and then approve or reject them. You can access requests either from the **Home** screen or by clicking the **Manage Users** icon from the side navigation bar.

From the **View Request** screen you can also override an approval, download application requests and delete an application request. The option to approve and reject a request depends on the workflow and the status of the selected request. To delete an online application request, Non-cardholders must have that entitlement assigned to them.

CitiManager (Previously)	CitiManager (Now)
<p><b>Navigation:</b> Home Screen &gt; Request ID Link</p> <p><b>Application and Maintenance Requests – Home Screen</b></p>	<p><b>Navigation:</b> Home Screen &gt; Application Request or Maintenance Request ID Link</p> <p><b>Application and Maintenance Requests – Home Screen</b></p>
<p><b>Navigation:</b> Manage Card Accounts &gt; View Requests Button</p> <p><b>Application and Maintenance Requests – Manage Card Accounts</b></p>	<p><b>Navigation:</b> Manage Users Icon &gt; View Requests Link &gt; Search &gt; Refine Results &gt; Request ID Link</p> <p><b>Application and Maintenance Requests – Manage Card Accounts</b></p>

## Manage Card Program

To manage card program activities, click the **Manage Card Program** icon from the side navigation bar. You can initiate a new card account application, run reports, set passcodes and complete bulk transfers.

To complete bulk online maintenance (BOLM), bulk applications (BOLA) and upload the supervisor list, click the **Document Management** link.

### CitiManager (Previously)

Navigation: Manage Card Program Tab

#### Manage Card Program Options

The screenshot shows the 'Manage Card Program' tab selected in the navigation bar. Below the navigation bar, there are several buttons: 'Account Info', 'Apply For New Card', 'New Account Application', 'Account Maintenance', 'View Hierarchy', and 'View Dispute'. A red box highlights these buttons. Below the buttons, there is a 'View account information' section and a 'Link another card account' button.

### CitiManager (Now)

Navigation: Manage Card Program Icon

#### Manage Card Program Options

The screenshot shows the new CitiManager interface. The 'Manage Card Program' icon is highlighted in red in the side navigation bar. The main dashboard displays several key metrics: '260 ACCOUNTS OVERDUE', '\$1,000.00 TOTAL CREDIT REMAINING', and '1% UNACTIVATED CARDS (7/23)'. Below these metrics, there is a 'Maintenance Request' table with columns for 'REQUEST ID', 'STATUS', and 'REQUEST TYPE'. The table lists several requests with IDs like 6010965892, 6010965884, 6010963190, 6010962000, 6010961149, 6010957279, and 6010968783, all with a status of 'Waiting for approval'.

REQUEST ID	STATUS	REQUEST TYPE
6010965892	Waiting for approval	Individual online maintenance
6010965884	Waiting for approval	Individual online maintenance
6010963190	Waiting for approval	Individual online maintenance
6010962000	Waiting for approval	Individual online maintenance
6010961149	Waiting for approval	Individual online maintenance
6010957279	Waiting for approval	Individual online maintenance
6010968783	Waiting for approval	Individual online maintenance

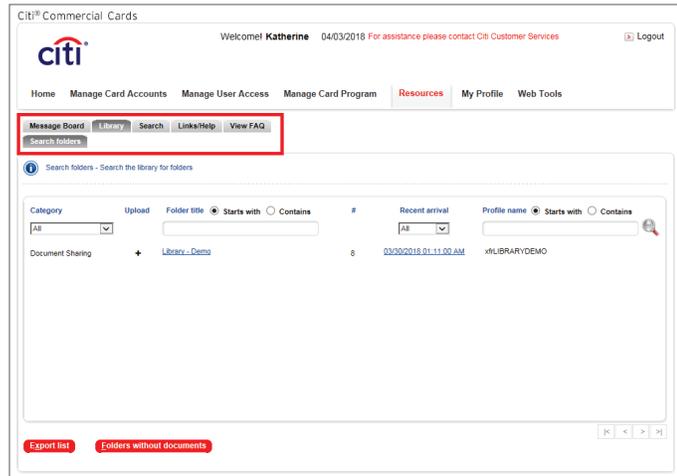
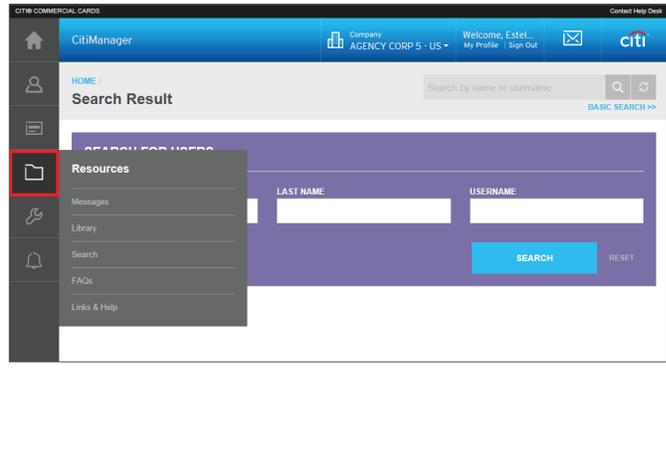
## My Profile

To view information related to your CitiManager Site profile such as contact details, user roles, hierarchy, entitlements or to update your user preferences, change your password, reset your challenge questions, merge usernames, change your primary company, link a card account or set your out of office back up, click the **My Profile** link that displays under your name at the top of the screen. When the **Contact Information** screen displays, click the link for the action you wish to perform.

CitiManager (Previously)	CitiManager (Now)															
<p><b>Navigation: My Profile Tab</b></p> <p><b>My Profile Options</b></p> <p>Citi® Commercial Cards</p> <p>Welcome! <b>Katherine</b> 04/03/2018 For assistance please contact Citi Customer Services <a href="#">Logout</a></p> <p>CITI DEMO - US</p> <p>Home Manage Card Accounts Manage User Access Manage Card Program Resources <b>My Profile</b> Web Tools</p> <p>View and update your profile details and preferences.</p> <p>Name Katherine Company CITI DEMO Title Non-cardholder</p> <table border="1"> <thead> <tr> <th>No.</th> <th>Non cardholder hierarchy name</th> <th>Non cardholder name</th> <th>Non cardholder User Profile Email Address</th> <th>Non cardholder contact number</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>TEST ACCTS AGENCY 99 IBT</td> <td>TEST MANAGER</td> <td>john.mata@nomail.com</td> <td>123456789</td> </tr> <tr> <td>2</td> <td>TEST ACCTS AGENCY 99 CBT</td> <td>TEST MANAGER</td> <td></td> <td></td> </tr> </tbody> </table> <p> <a href="#">Update user profile</a> <a href="#">Update preferences</a> <a href="#">Change password</a> <a href="#">Reset challenge questions</a> <a href="#">Username merger</a> <a href="#">Change base company</a> <a href="#">Set out of office</a> <a href="#">Alerts</a> </p>	No.	Non cardholder hierarchy name	Non cardholder name	Non cardholder User Profile Email Address	Non cardholder contact number	1	TEST ACCTS AGENCY 99 IBT	TEST MANAGER	john.mata@nomail.com	123456789	2	TEST ACCTS AGENCY 99 CBT	TEST MANAGER			<p><b>Navigation: My Profile Link</b></p> <p><b>My Profile Options</b></p> <p>CITI® COMMERCIAL CARDS</p> <p>CitiManager Company CITI DEMO - US Welcome, Estel... My Profile Sign Out</p> <p>HOME</p> <p><b>My Profile: Contact Information</b></p> <p>CONTACT INFORMATION Update user details. The fields marked with asterisk (*) are mandatory.</p> <p>USER ROLE AND HIERARCHY TITLE</p> <p>ENTITLEMENTS</p> <p>USER PREFERENCES * USERNAME DEMOID1</p> <p>CHANGE PASSWORD * FIRST NAME Estella</p> <p>RESET CHALLENGE QUESTIONS * LAST NAME Smith</p> <p>MERGE USERNAMES * COUNTRY UNITED STATES OF AMERICA</p> <p>CHANGE PRIMARY COMPANY</p> <p>LINK CARD ACCOUNT</p> <p>APPLY FOR NEW CARD * ADDRESS LINE 1 111 Main Street</p> <p>SET OUT OF OFFICE</p>
No.	Non cardholder hierarchy name	Non cardholder name	Non cardholder User Profile Email Address	Non cardholder contact number												
1	TEST ACCTS AGENCY 99 IBT	TEST MANAGER	john.mata@nomail.com	123456789												
2	TEST ACCTS AGENCY 99 CBT	TEST MANAGER														

## Resources

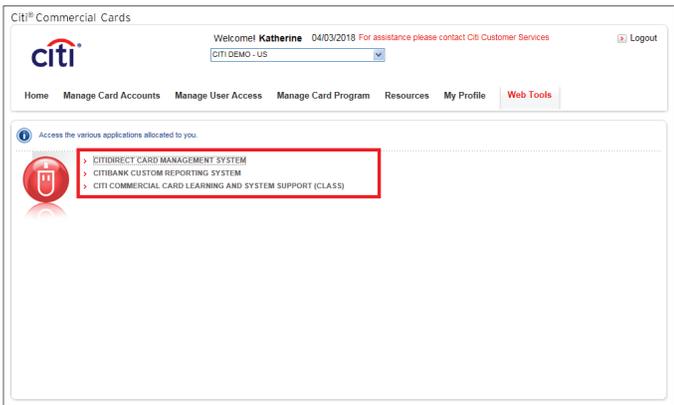
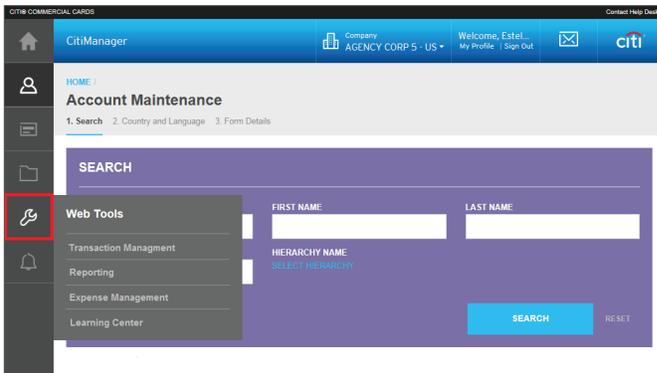
To view and post messages, use Library to upload and download files to and from Citi, search for Non-cardholders, access links to resources and Frequently Asked Question (FAQs) click the **Resources** icon from the side navigation bar.

CitiManager (Previously)	CitiManager (Now)
<p><b>Navigation:</b> Resources Tab &gt; Messages Board, Library, Search, Links/Help, View FAQ Tabs</p>	<p><b>Navigation:</b> Resources Icon &gt; Messages, Library, Search, FAQs or Links &amp; Help Links</p>
<p><b>Resources Options</b></p>  <p>The screenshot shows the 'CitiManager' interface with a navigation bar at the top. The 'Resources' tab is highlighted in red. Below the navigation bar, there is a search results table for folders. The table has columns for Category, Upload, Folder title, Starts with, Contains, #, Recent arrival, and Profile name. A single row is visible with the folder name 'Library - Demo'.</p>	<p><b>Resources Options</b></p>  <p>The screenshot shows the updated 'CitiManager' interface. A side navigation bar on the left contains a 'Resources' icon, which is highlighted in red. The main content area displays a search result page with a search bar and a 'SEARCH' button.</p>

## Web Tools

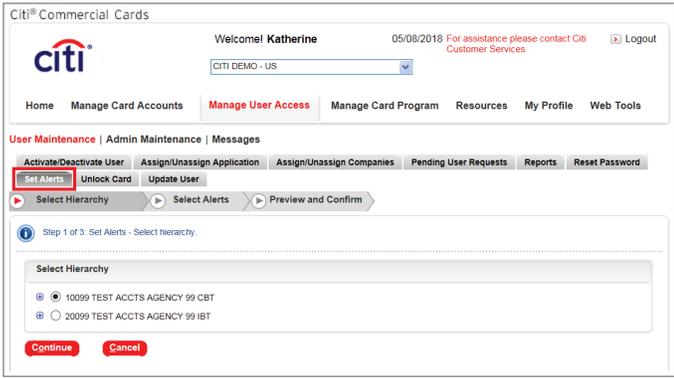
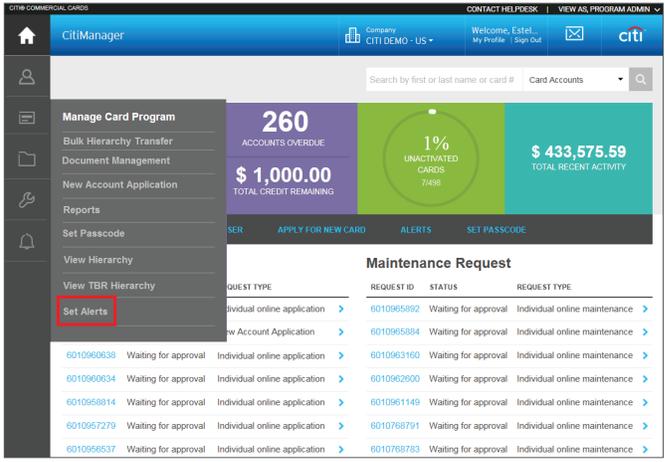
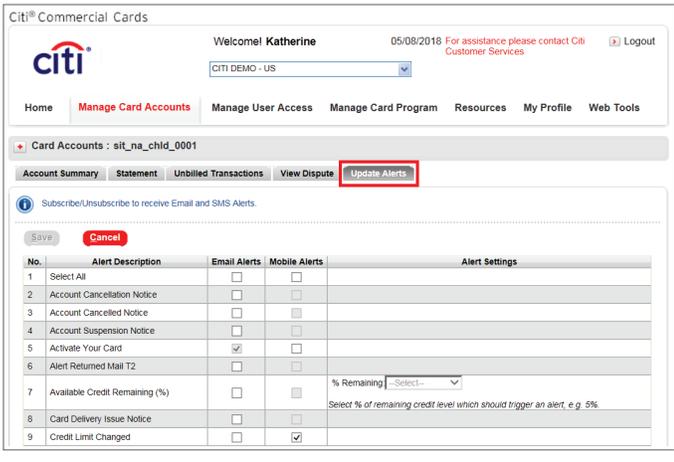
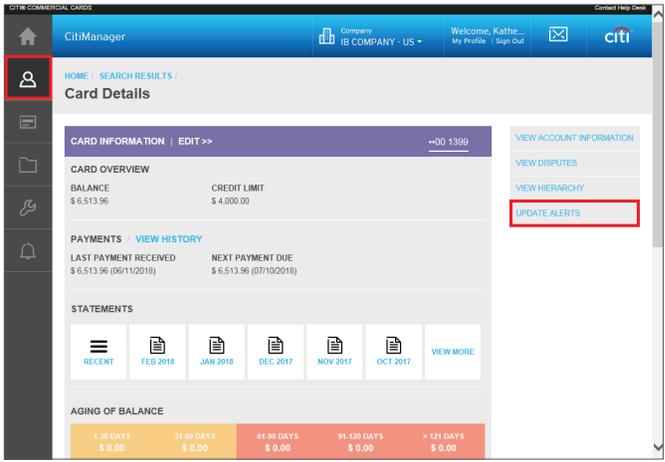
Depending on your entitlements, you can access CitiManager – Transaction Management (CCMS), CitiManager – Reporting (CCRS) and CitiManager – Expense Management (GCMS) by clicking the **Web Tools** icon from the side navigation bar.

Additionally you can access the Learning Center (CLASS) to register for and launch reference documents, web-based training and register for webinars and instructor-led training.

CitiManager (Previously)	CitiManager (Now)
<p><b>Navigation:</b> Web Tools Tab &gt; CCMS, CCRS, GCMS or CLASS Links</p> <p><b>Web Tool Options</b></p> 	<p><b>Navigation:</b> Web Tools Icon &gt; Transaction Management, Reporting, Expense Management or Learning Center Links</p> <p><b>Web Tool Options</b></p> 

## Alerts

It is possible to set alerts available to Cardholders in your hierarchy, update alerts received by a specific Cardholder and set the alerts you receive as a Non-cardholder when selected activities occur to your Cardholder's accounts, for example, when a transaction is declined.

CitiManager (Previously)	CitiManager (Now)
<p><b>Set Alerts for You Hierarchy</b></p> <p>Navigation: Manage User Access Tab &gt; Set Alerts Tab</p> <p>Alerts – Hierarchy</p> 	<p><b>Set Alerts for Your Hierarchy</b></p> <p>Navigation: Manage Card Program Icon &gt; Set Alerts Link</p> <p>Alerts – Hierarchy</p> 
<p><b>Modify Alerts Received by a Cardholder</b></p> <p>Navigation: Manage Card Accounts Tab &gt; Search &gt; Manage Account Button &gt; Update Alerts Tab</p> <p>Alerts – Cardholder</p> 	<p><b>Modify Alerts Received by a Cardholder</b></p> <p>Navigation: Manage Users Icon &gt; Card Accounts &gt; Update Alerts Link</p> <p>Alerts – Cardholder</p> 

CitiManager (Previously) <span style="font-size: 2em;">➔</span>	CitiManager (Now)																																			
<p><b>Set Your Own Alerts as a Non-cardholder</b></p> <p><b>Navigation:</b> My Profile Tab &gt; Alerts Link</p> <p><b>Alerts – Non-cardholders</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Citi® Commercial Cards</p> <p style="text-align: right;">Welcome! Katherine 05/08/2018 For assistance please contact Citi Customer Services <a href="#">Logout</a></p> <p style="text-align: center;">CITI DEMO - US</p> <p style="text-align: center;">Home Manage Card Accounts Manage User Access Manage Card Program Resources <b>My Profile</b> Web Tools</p> <p>View and update your profile details and preferences.</p> <p>Name Katherine Georgenson</p> <p>Company CITI DEMO</p> <p>Title Non-cardholder</p> <p>Non-cardholder details</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th>No.</th> <th>Non cardholder hierarchy name</th> <th>Non cardholder name</th> <th>Non cardholder User Profile Email Address</th> <th>Non cardholder contact number</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>TEST ACCTS AGENCY 99 IBT</td> <td>TEST MANAGER</td> <td>john.mala@nomail.com</td> <td>123456789</td> </tr> <tr> <td>2</td> <td>TEST ACCTS AGENCY 99 CBT</td> <td>TEST MANAGER</td> <td></td> <td></td> </tr> </tbody> </table> <p style="font-size: 0.7em; margin-top: 5px;"> <a href="#">Update user profile</a> <a href="#">Update preferences</a> <a href="#">Change password</a> <a href="#">Reset challenge questions</a> <a href="#">Username merger</a> <a href="#">Change base company</a> <a href="#">Set o</a> </p> <p style="margin-top: 5px;"><a href="#">Alerts</a></p> </div>	No.	Non cardholder hierarchy name	Non cardholder name	Non cardholder User Profile Email Address	Non cardholder contact number	1	TEST ACCTS AGENCY 99 IBT	TEST MANAGER	john.mala@nomail.com	123456789	2	TEST ACCTS AGENCY 99 CBT	TEST MANAGER			<p><b>Set Your Own Alerts as a Non-cardholder</b></p> <p><b>Navigation:</b> Alerts Icon &gt; Alert Subscriptions Link or Home Screen &gt; Alerts Link</p> <p><b>Alerts – Non-cardholders</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>CitiManager</p> <p style="text-align: right;">Welcome, Kathe... My Profile Sign Out</p> <p>Alerts Subscription</p> <p>Subscribe/Unsubscribe to receive Alerts.</p> <p>CONTACT PREFERENCES</p> <p>EMAIL ADDRESS george@charter.net   <a href="#">EDIT</a></p> <p>TRANSACTIONAL ALERTS</p> <p>Alerts</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th>Alerts Subscription</th> <th>SELECT HIERARCHY</th> <th>ALERT SETTINGS</th> <th>EMAIL</th> </tr> </thead> <tbody> <tr> <td>Audit Log</td> <td></td> <td>% Remaining --Select--</td> <td><input type="checkbox"/></td> </tr> <tr> <td>On-Demand Mobile Alerts</td> <td></td> <td>Select % of remaining credit level which should trigger an alert, e.g. 5%</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Declined Transaction</td> <td>SELECT HIERARCHY</td> <td>Note: If the Decline Alert is triggered, no other subscribed alerts will be sent, only the Decline Alert will be sent.</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Dispute Resolution</td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> </div>	Alerts Subscription	SELECT HIERARCHY	ALERT SETTINGS	EMAIL	Audit Log		% Remaining --Select--	<input type="checkbox"/>	On-Demand Mobile Alerts		Select % of remaining credit level which should trigger an alert, e.g. 5%	<input type="checkbox"/>	Declined Transaction	SELECT HIERARCHY	Note: If the Decline Alert is triggered, no other subscribed alerts will be sent, only the Decline Alert will be sent.	<input type="checkbox"/>	Dispute Resolution			<input checked="" type="checkbox"/>
No.	Non cardholder hierarchy name	Non cardholder name	Non cardholder User Profile Email Address	Non cardholder contact number																																
1	TEST ACCTS AGENCY 99 IBT	TEST MANAGER	john.mala@nomail.com	123456789																																
2	TEST ACCTS AGENCY 99 CBT	TEST MANAGER																																		
Alerts Subscription	SELECT HIERARCHY	ALERT SETTINGS	EMAIL																																	
Audit Log		% Remaining --Select--	<input type="checkbox"/>																																	
On-Demand Mobile Alerts		Select % of remaining credit level which should trigger an alert, e.g. 5%	<input type="checkbox"/>																																	
Declined Transaction	SELECT HIERARCHY	Note: If the Decline Alert is triggered, no other subscribed alerts will be sent, only the Decline Alert will be sent.	<input type="checkbox"/>																																	
Dispute Resolution			<input checked="" type="checkbox"/>																																	

## Bulk Online Applications/Bulk Online Maintenance

Bulk Online Applications (BOLA) allows Non-cardholders to initiate a large number of Cardholder Applications in bulk using a file upload process. When initiating applications in bulk, Cardholders do not need to create their application manually through the CitiManager Site.

Bulk Online Maintenance (BOLM) allows Non-cardholders to submit a large number of Cardholder Maintenance requests in bulk using a file upload process.

You can upload and download BOLA/BOLM forms from the **Document Management** screen by selecting the desired function and activity.

CitiManager (Previously)	CitiManager (Now)
<p><b>Navigation:</b> Set Passcode Link &gt; Download From Template Link</p>	<p><b>Navigation:</b> Manage Card Program Tab &gt; Document Management Link &gt; Select either Bulk Online Application or Bulk Online Maintenance function &gt; Select either the upload or download activity.</p>

## Navigation Quick Reference

The functions you have access to may vary based on your individual company set-up and entitlements that have been assigned to you.

Task	Navigation
<b>Login Screen</b>	
Login to CitiManager	www.citimanager.com/login > Login Screen
Choose Your Language	www.citimanager.com/login > Login Screen
Self-register as Non-cardholder	www.citimanager.com/login > Login Screen
Retrieve Forgotten Username	www.citimanager.com/login > Login Screen
Reset Forgotten Password	www.citimanager.com/login > Login Screen
<b>My Profile</b>	
Update Contact Information	My Profile Link > Contact Information Link
View User Roles and Hierarchy	My Profile Link > User Role and Hierarchy Link
View Entitlements	My Profile Link > Entitlements Link
Update User Preferences	My Profile Link > User Preferences Link
Change Password	My Profile Link > Change Password Link
Reset Challenge Questions	My Profile Link > Reset Challenge Questions Link
Merge User Names	My Profile Link > Merge Usernames Link
Change Primary Company	My Profile Link > Change Primary Company Link
Link/Unlink Card Account	My Profile Link > Link Card Account Link
Apply for New Card	My Profile Link > Apply for New Card Link
Set/Remove Out of Office Backup	My Profile Link > Set Out of Office Link
<b>Manage Users</b>	
View Card Account Information	Manage Users Icon > Card Accounts > Search > Card Number Link
View Disputes	Manage Users Icons > Card Accounts > Search > Card Number Link > View Disputes Link
View Hierarchy	Manage Users Icon > Card Accounts > Search > Card Number Link > View Hierarchy Link
View and Download Statements and Transactions (Recent and Billed)	Manage Users Icon > Card Accounts > Search > Card Number Link > Recent or Statement Date Icon
Dispute a Transaction	Manage Users Icon > Card Accounts > Search > Card Number Link > Recent or Statement Date Icon > Click the (...) Ellipsis for Transaction to be Disputed
Perform Account Maintenance	Manage Users Icon > Account Maintenance Link > Search > Select Account Radio Button > Update Account Button
View/Approve/Deny Application and Maintenance Requests	Home Screen > Application Request or Maintenance Section > Request ID Link Manage Users Icon > View Requests Link > Search > Request ID Link
Update User Personal Information, Contact Details, Role, Hierarchy or Entitlements	Manage Users Icon > User Search Link > Search > Username Link
View Refund History	Manage Users Icon > Refund History Link > Search > Account Number Link
Print Multiple Statements	Manage Users Icon > Print Multiple Statement Link > Search
Create User	Manage Users Icon > Create User Link > Create Button

Task	Navigation
<b>Manage Card Program</b>	
New Account Application	Manage Card Program Icon > New Account Application Link
Run Reports	Manage Card Program Icon > Reports Link
Set Passcode	Manage Card Program Icon > Set Passcode Link
Account Credit Refund	Manage Card Program Icon > Account Credit Refund Link
Bulk Hierarchy Transfer	Manage Card Program Icon > Bulk Hierarchy Transfer Link
Transfer Hierarchy History	Manage Card Program Icon > Transfer Hierarchy History Link
Download/Upload Bulk Online Applications	Manage Card Program Icon > Document Management Link > Select Function > Select Activity
Download/Upload Bulk Online Maintenance	Manage Card Program Icon > Document Management Link > Select Function > Select Activity
Update PA Email Address for Status Emails	Manage Card Program Icon > Document Management Link > Select Function > Select Activity
View Hierarchy	Manage Card Program Icon > View Hierarchy Link
<b>Resources</b>	
View and Post Messages	Resources Icon > Message Link
Use Library to Upload and Download Files	Resources Icon > Library Link
Search for Non-cardholders	Resources Icon > Search Link
View Frequently Asked Questions (FAQs)	Resources Icon > FAQs Link
Access Links & Help	Resources Icon > Links & Help Link
<b>Web Tools</b>	
Access CitiManager – Reporting (CCRS)	Web Tools Icon > Reporting Link
Access CitiManager – Transaction Management (CCMS)	Web Tools Icon > Transaction Management Link
Access CitiManager – Expense Management (GCMS)	Web Tools Icon > Expense Management Link
Access the Learning Center (CLASS)	Web Tools Icon > Learning Center Link
<b>Alerts</b>	
Set Alerts for Your Hierarchy	Manage Card Program Icon > Set Alerts Link
Set Alerts Received as a Non-cardholder	Alerts Icon > Alert Subscriptions Link or Home Screen Quick Links > Alerts Link
Set Alerts Received by a Cardholder	Manage User Icon > Card Accounts > Update Alerts Link
Manage On-Demand Mobile Alert Commands	Alerts Icon > On-Demand Mobile Alerts

Treasury and Trade Solutions  
[citi.com/treasuryandtradesolutions](https://citi.com/treasuryandtradesolutions)

© 2018 Citibank, N.A. All rights reserved. Citi and Arc Design and CitiManager are registered service marks of Citigroup Inc.  
1715943 GTS26751 07/18

