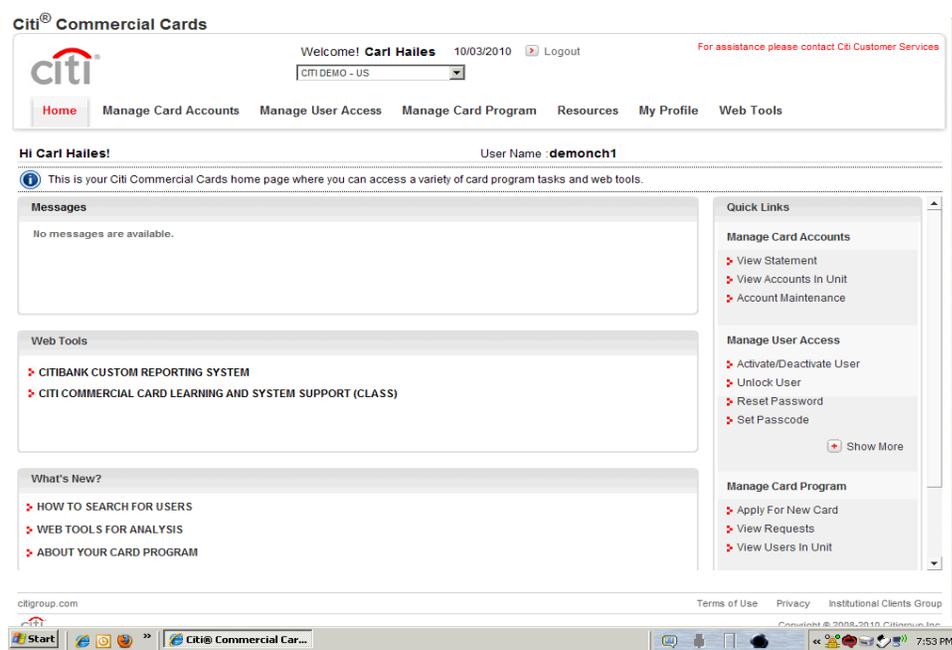


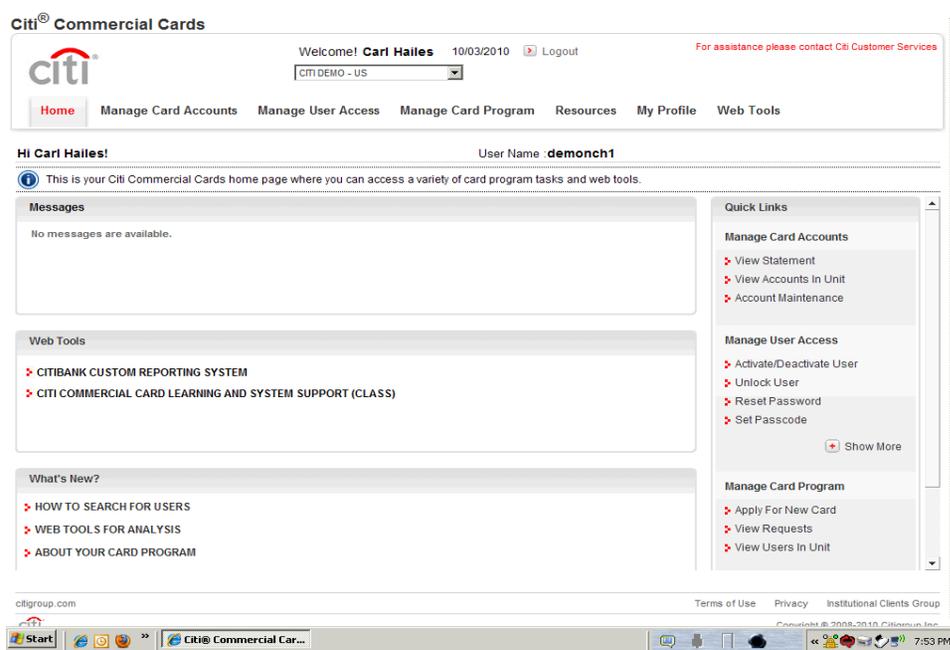
Apply for New Card



"In this lesson you will learn how to apply for a new card."

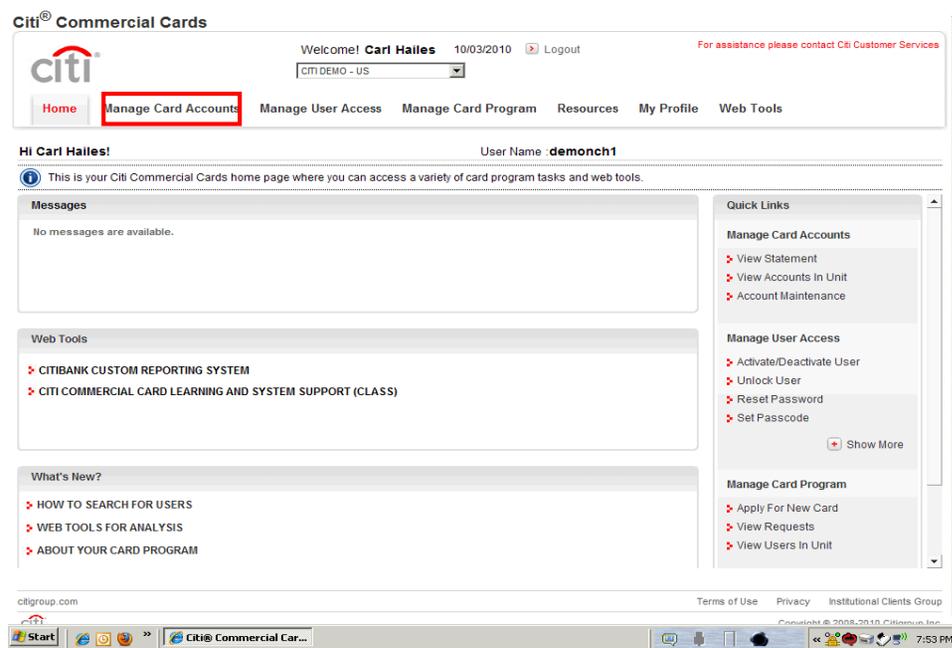
"Let's Begin!"

Based on your company's program management needs, you may or may not use some of the functionality demonstrated in this computer based training.



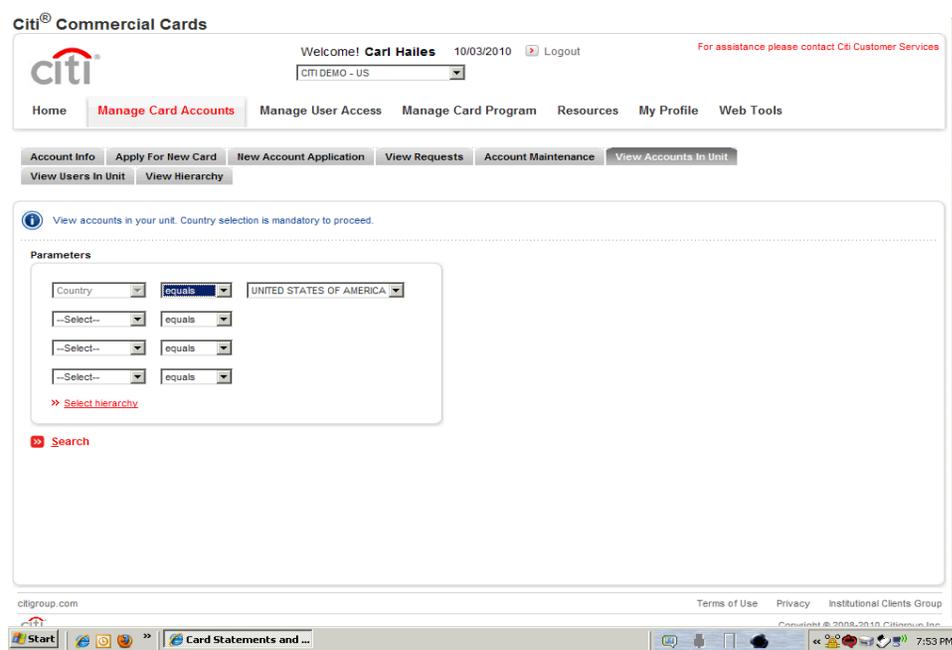
Step 1

Program Administrators apply for a card in CitiManager using this Apply for New Card function.



Step 2

Click the **Manage Card Accounts** tab.

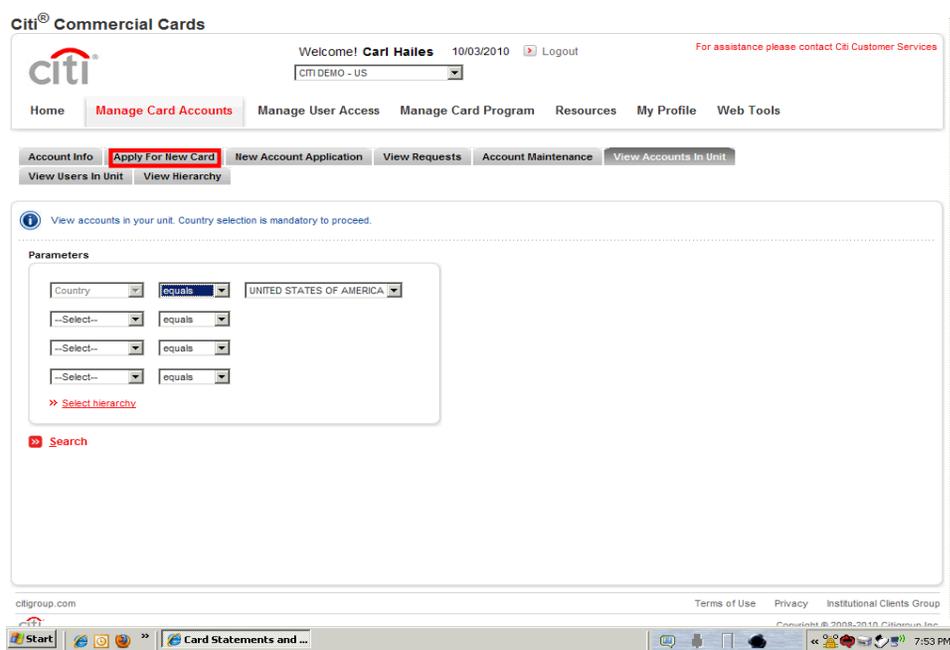


Step 3

The Manage Card Accounts sub-tabs display.

Step 4

Click the **Apply for New Card** tab.



Citi® Commercial Cards

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CITI DEMO - US

Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

i You will be prompted in the next three steps to complete the card application.
Step 1 - Please enter the Invitation Passcode and Inviter's Email provided by your organization. This is for your security and to ensure that you are directed to the Card Application Form chosen by your organization. Please contact your card program administrator if you do not have these details.

* Invitation Passcode

* Inviter's Email Address

Continue **Clear**

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Start Card Statements and ... 7:53 PM

Step 5

The Invitation Passcode screen displays. The applicant should receive the application passcode and the Inviter's (Program Administrator) email address from the Program Administrator of their hierarchy. This is the first step in completing an online application.

The screenshot shows the Citi Commercial Cards web application. At the top, it says 'Citi® Commercial Cards' and 'Welcome! Carl Hailes 10/03/2010'. There are navigation tabs for 'Home', 'Manage Card Accounts', 'Manage User Access', 'Manage Card Program', 'Resources', 'My Profile', and 'Web Tools'. Below these are more specific tabs: 'Account Info', 'Apply For New Card', 'New Account Application', 'View Requests', 'Account Maintenance', and 'View Accounts In Unit'. The main content area has an information icon and text: 'You will be prompted in the next three steps to complete the card application. Step 1 - Please enter the Invitation Passcode and Inviter's Email provided by your organization. This is for your security and to ensure that you are directed to the Card Application Form chosen by your organization. Please contact your card program administrator if you do not have these details.' Below this is a form with two fields: '* Invitation Passcode' and '* Inviter's Email Address'. The 'Invitation Passcode' field is highlighted with a red border. At the bottom of the form are 'Continue' and 'Clear' buttons. The footer includes 'citi group.com', 'Terms of Use', 'Privacy', and 'Institutional Clients Group'. The Windows taskbar at the bottom shows the Start button, a taskbar with 'Card Statements and ...', and a system tray with the time '7:53 PM'.

Step 6

Enter the desired information into the **Invitation Passcode** field. Enter a valid value e.g. "**citibank1234**".

The screenshot displays the Citi Commercial Cards web application. At the top, the Citi logo is on the left, and the user is logged in as Carl Hailes on 10/03/2010. A dropdown menu shows 'CITI DEMO - US'. Below the header is a navigation menu with options: Home, Manage Card Accounts (highlighted), Manage User Access, Manage Card Program, Resources, My Profile, and Web Tools. A secondary menu includes: Account Info, Apply for New Card (highlighted), New Account Application, View Requests, Account Maintenance, View Accounts In Unit, View Users In Unit, and View Hierarchy. The main content area features an information icon and a message: 'You will be prompted in the next three steps to complete the card application. Step 1 - Please enter the Invitation Passcode and Inviter's Email provided by your organization. This is for your security and to ensure that you are directed to the Card Application Form chosen by your organization. Please contact your card program administrator if you do not have these details.' Below this message are two input fields: '* Invitation Passcode' (with masked characters) and '* Inviter's Email Address'. At the bottom of the form are 'Continue' and 'Clear' buttons. The footer contains 'citi group.com', 'Terms of Use', 'Privacy', and 'Institutional Clients Group'. The Windows taskbar at the bottom shows the Start button, a taskbar with 'Card Statements and ...', and a system tray with the time 7:53 PM.

Step 7

Press **[Tab]**.

The screenshot shows the Citi Commercial Cards web application. At the top, it says 'Citi® Commercial Cards' and 'Welcome! Carl Hailes 10/03/2010'. There are navigation tabs for 'Home', 'Manage Card Accounts', 'Manage User Access', 'Manage Card Program', 'Resources', 'My Profile', and 'Web Tools'. Below these are more specific tabs: 'Account Info', 'Apply For New Card', 'New Account Application', 'View Requests', 'Account Maintenance', 'View Accounts In Unit', 'View Users In Unit', and 'View Hierarchy'. The main content area has an information icon and text: 'You will be prompted in the next three steps to complete the card application. Step 1 - Please enter the Invitation Passcode and Inviter's Email provided by your organization. This is for your security and to ensure that you are directed to the Card Application Form chosen by your organization. Please contact your card program administrator if you do not have these details.' There are two input fields: '* Invitation Passcode' (masked with dots) and '* Inviter's Email Address' (highlighted with a red box). Below the fields are 'Continue' and 'Clear' buttons. The footer includes 'citi group.com', 'Terms of Use', 'Privacy', and 'Institutional Clients Group'. The Windows taskbar at the bottom shows the Start button, a taskbar with 'Card Statements and ...', and a system tray with the time '7:53 PM'.

Step 8

Enter the desired information into the **Inviter's Email Address** field. Enter a valid value e.g. "**proadmin@citi.com**".

Step 9

Click the **Continue** link.

The screenshot shows the Citi Commercial Cards web application interface. At the top, it says "Citi® Commercial Cards" and "Welcome! Carl Hailes 10/03/2010". There are navigation tabs for "Home", "Manage Card Accounts", "Manage User Access", "Manage Card Program", "Resources", "My Profile", and "Web Tools". Below these are more specific tabs: "Account Info", "Apply For New Card", "New Account Application", "View Requests", "Account Maintenance", "View Accounts In Unit", "View Users In Unit", and "View Hierarchy". The main content area has an information icon and text: "You will be prompted in the next three steps to complete the card application. Step 1 - Please enter the Invitation Passcode and Inviter's Email provided by your organization. This is for your security and to ensure that you are directed to the Card Application Form chosen by your organization. Please contact your card program administrator if you do not have these details." Below this are two input fields: "* Invitation Passcode" (with a masked password) and "* Inviter's Email Address" (with the value "progadmin@citi.com"). At the bottom of the form are two buttons: "Continue" and "Clear". The footer of the page includes "citi group.com", "Terms of Use", "Privacy", and "Institutional Clients Group". The browser's taskbar at the bottom shows the Start button, a taskbar with "Card Statements and ...", and a system tray with the time "7:53 PM".

Step 10

If necessary, select the appropriate country or language.

The screenshot displays the Citi Commercial Cards web application. At the top, the Citi logo is on the left, and the user is logged in as Carl Hailes on 10/03/2010. A navigation menu includes links for Home, Manage Card Accounts, Manage User Access, Manage Card Program, Resources, My Profile, and Web Tools. Below this is a secondary menu with buttons for Account Info, Apply For New Card, New Account Application, View Requests, Account Maintenance, and View Accounts In Unit. The main content area is titled "Step 2 - Please select the country where your card will be billed and the language displayed on your card application. If your organization has disabled the field you do not need to complete this section." It contains two dropdown menus: "* Select country" with "UNITED STATES OF AMERICA" selected, and "* Select language" with "ENGLISH" selected. At the bottom of the form are "Continue" and "Cancel" buttons. The footer of the application includes "citi group.com", "Terms of Use", "Privacy", and "Institutional Clients Group". The Windows taskbar at the bottom shows the Start button, a taskbar with "Card Statements and ..." open, and a system tray with the time 7:53 PM.

The screenshot displays the Citi Commercial Cards web application. At the top, the Citi logo is on the left, and the user is logged in as Carl Hailes on 10/03/2010. A navigation menu includes links for Home, Manage Card Accounts, Manage User Access, Manage Card Program, Resources, My Profile, and Web Tools. Below this is a secondary menu with buttons for Account Info, Apply For New Card, New Account Application, View Requests, Account Maintenance, and View Accounts In Unit. The main content area is titled "Step 2 - Please select the country where your card will be billed and the language displayed on your card application. If your organization has disabled the field you do not need to complete this section." It contains two dropdown menus: "* Select country" with "UNITED STATES OF AMERICA" selected, and "* Select language" with "ENGLISH" selected. Below the dropdowns are two buttons: "Continue" and "Cancel". The footer of the application includes "citi group.com", "Terms of Use", "Privacy", and "Institutional Clients Group". The Windows taskbar at the bottom shows the Start button, a taskbar with "Card Statements and ..." open, and a system tray with the time 7:53 PM.

Step 11

Click the **Continue** link.

The screenshot displays the Citi Commercial Cards application interface. At the top, the Citi logo is on the left, and the user is logged in as Carl Hailes on 10/03/2010. A navigation menu includes options like 'Home', 'Manage Card Accounts', and 'Apply For New Card'. The main content area is titled 'Step 3 - Please complete the form below and submit.' and shows a form for 'CITIBANK-IOA-TEST99'. The form has a 'PERSONAL' section with input fields for 'First Name' (containing 'Carl'), 'Last Name', and 'Date of Birth' (with a '(MM/DD/YYYY)' placeholder). The browser's taskbar at the bottom shows the Start button, a taskbar with 'Card Statements and ...', and a system tray with the time 7:53 PM.

Step 12

The card account application displays. Complete all required fields before submitting the application.

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CITI DEMO - US

Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

Step 3 - Please complete the form below and submit.

Form short name
CITIBANK-IOA-TEST99

CITIBANK-IOA-TEST99

PERSONAL

First Name

Last Name

Date of Birth (MM/DD/YYYY)

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Start Card Statements and ... 7:53 PM

Step 13

Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Hailes**".

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Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

Step 3 - Please complete the form below and submit.

Form short name
CITIBANK-IOA-TEST99

CITIBANK-IOA-TEST99

PERSONAL

First Name

Last Name

Date of Birth (MM/DD/YYYY)

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Start Card Statements and ... 7:54 PM

Step 14

Enter the desired information into the **Date of Birth** field. Enter a valid value e.g. "01/01/1980".

Note: The applicant must be at least 18 years of age in order to apply for a card.

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Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

Step 3 - Please complete the form below and submit.

Form short name
CITIBANK-IOA-TEST99

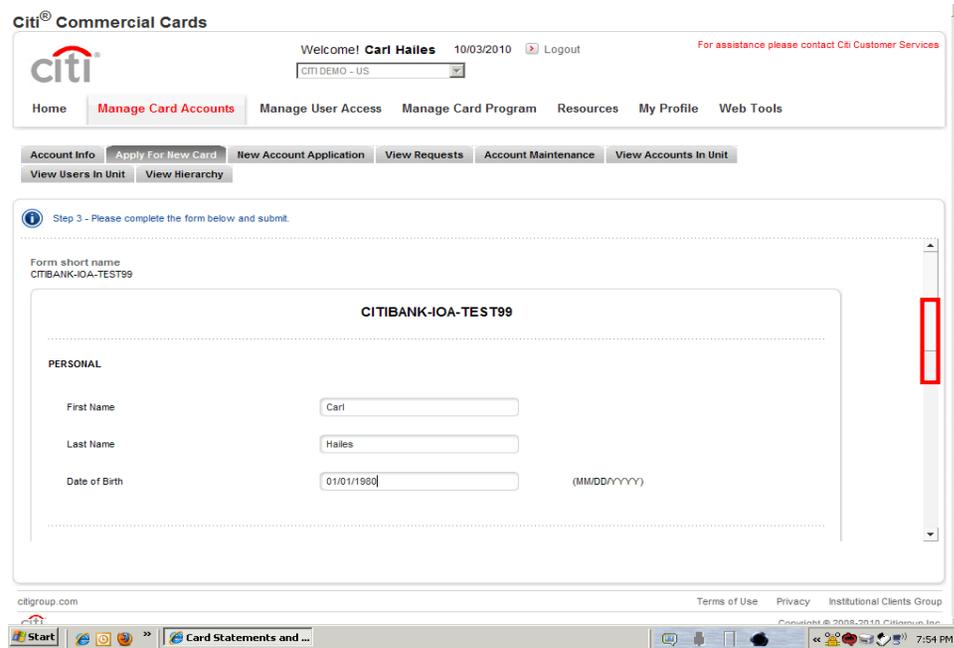
CITIBANK-IOA-TEST99

PERSONAL

First Name

Last Name

Date of Birth (MM/DD/YYYY)



Step 15

Click the scrollbar.

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Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

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Step 3 - Please complete the form below and submit.

CONTACT

Address Line 1

Address Line 2

City

State

Postal Code

OTHER

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Start Card Statements and ... 7:54 PM

Step 16

Enter the desired information into the **Address Line 1** field. Enter a valid value e.g. **"123 ABC Street"**.

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Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

Step 3 - Please complete the form below and submit.

CONTACT

Address Line 1 123 ABC Street

Address Line 2

City

State --Select--

Postal Code

OTHER

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Start Card Statements and ... 7:54 PM

Step 17

Enter the desired information into the **City** field. Enter a valid value e.g. **"Norfolk"**.

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Account Info Apply For New Card New Account Application View Requests Account Maintenance View Accounts In Unit

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Step 3 - Please complete the form below and submit.

CONTACT

Address Line 1 123 ABC Street

Address Line 2

City Norfolk

State --Select--

Postal Code

OTHER

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Start Card Statements and ... 7:54 PM

Step 18

State, province, or country may be required by your organization depending upon your region. Neither is required in this example.

Press [Enter] to [continue](#)

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Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

Step 3 - Please complete the form below and submit.

CONTACT

Address Line 1 123 ABC Street

Address Line 2

City Norfolk

State --Select--

Postal Code

OTHER

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Start Card Statements and ... 7:54 PM

Step 19

Enter the desired information into the **Postal Code** field. Enter a valid value e.g. **"23123"**.

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CITI DEMO - US

Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

View Users In Unit View Hierarchy

Step 3 - Please complete the form below and submit.

CONTACT

Address Line 1

Address Line 2

City

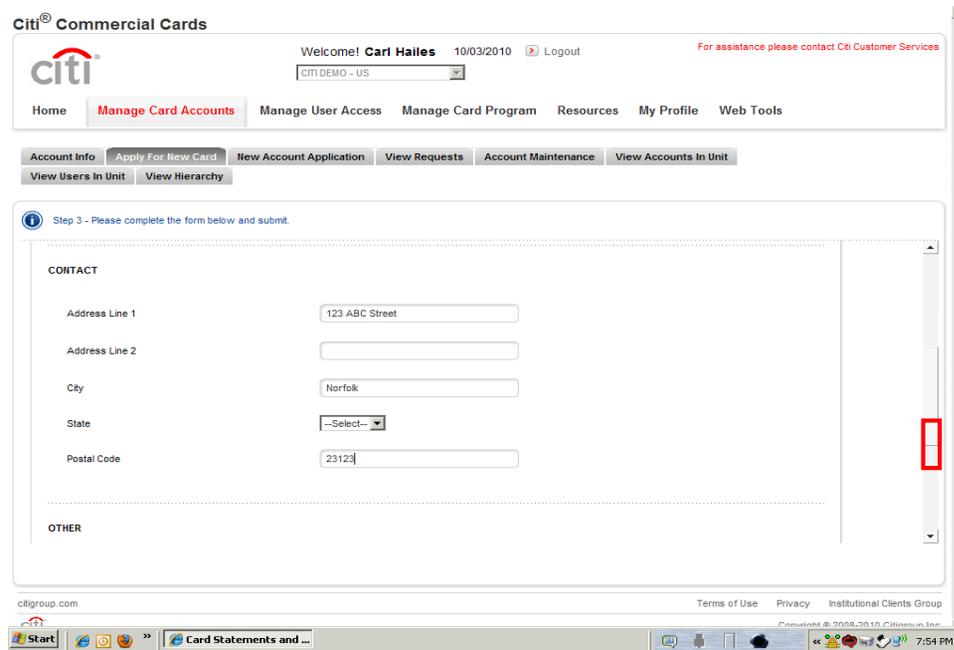
State

Postal Code

OTHER

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Step 20

Click the scrollbar.

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Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

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Step 3 - Please complete the form below and submit.

OTHER

Email Address

Social Security Number

CITIBANK-IOA-TEST99

Save as draft Submit Cancel

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Step 21

Enter the desired information into the **Social Security Number** field. Enter a valid value e.g. "**123456789**".

The SOC uses Employee ID #'s instead of SSN's. However, the individually-billed joint/several liability travel card requires the use of the SSN.

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CITI DEMO - US

Home **Manage Card Accounts** Manage User Access Manage Card Program Resources My Profile Web Tools

Account Info **Apply For New Card** New Account Application View Requests Account Maintenance View Accounts In Unit

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Step 3 - Please complete the form below and submit.

OTHER

Email Address

Social Security Number

CITIBANK-IOA-TEST99

[Save as draft](#) [Submit](#) [Cancel](#)

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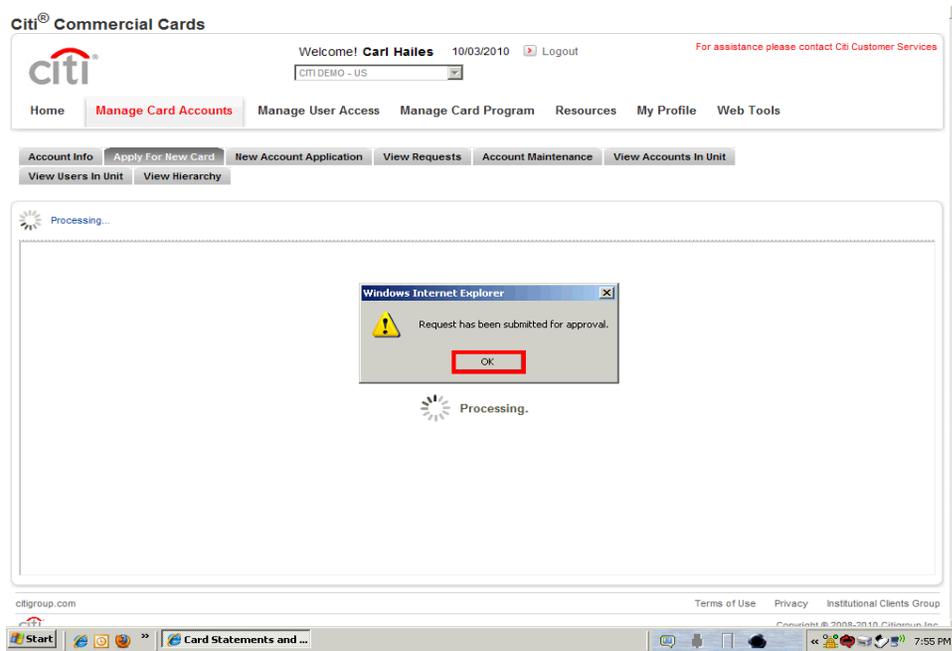
Start Card Statements and ... 7:54 PM

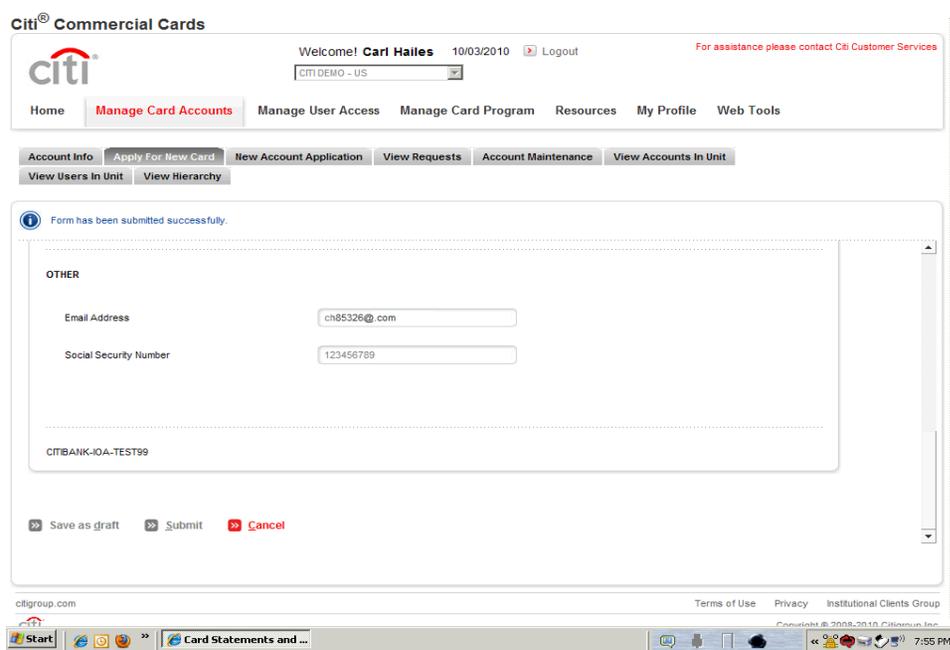
Step 22

Click the **Submit** link.

Step 23

Click the **OK** button.





Step 24

You will receive a confirmation indicating that you application has been successfully submitted.

To check the status of applications submitted online, refer to the View Requests under the Manage Card Accounts or Manage Card Program tabs.

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Step 25

"Congratulations!"

***"You have just completed the lesson
on Apply for a New Card."***

End of Procedure.