

Online Applications Quick Start Guide Cardholders

March 2015



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Apply for Card Using an Invitation Passcode

Key Concepts

Before applying for a new card, your Program Administrator will provide an Invitation Passcode and the Inviter’s Email address. Both are required during the registration process.

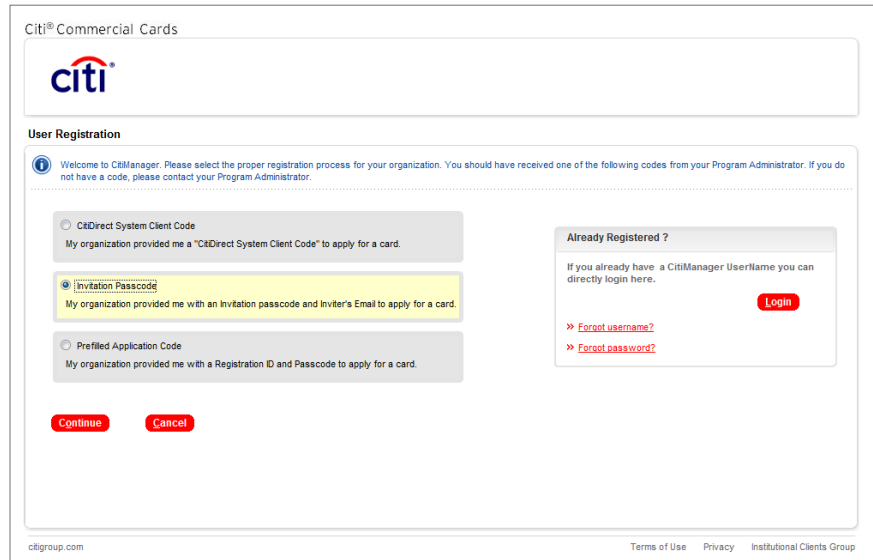
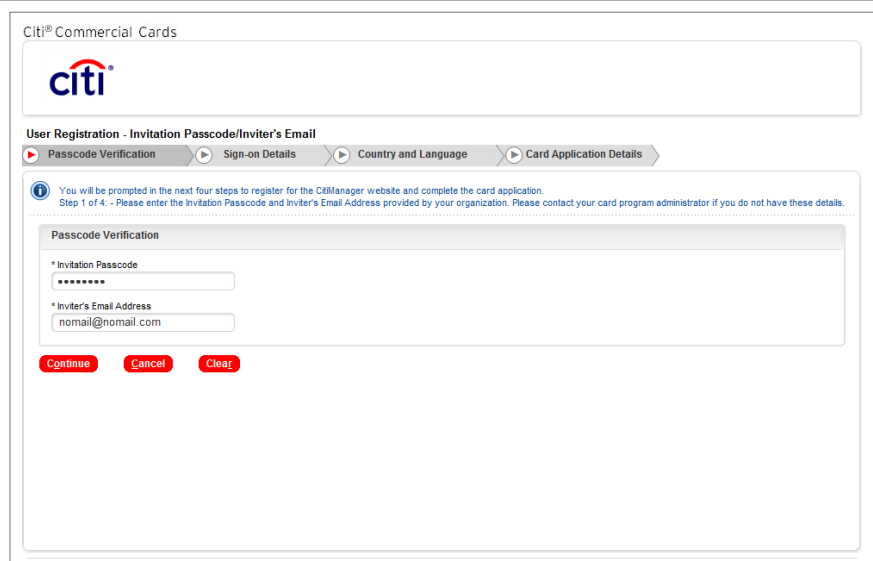
You will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Program Administrator.

You can view the status of your application in the CitiManager® Site using the username and passcode created when you apply for a new card.

Once your card application is approved, the account will be linked to the CitiManager Site username and password created during the application process. This will allow you to view and print statements.

Step-by-Step Instructions

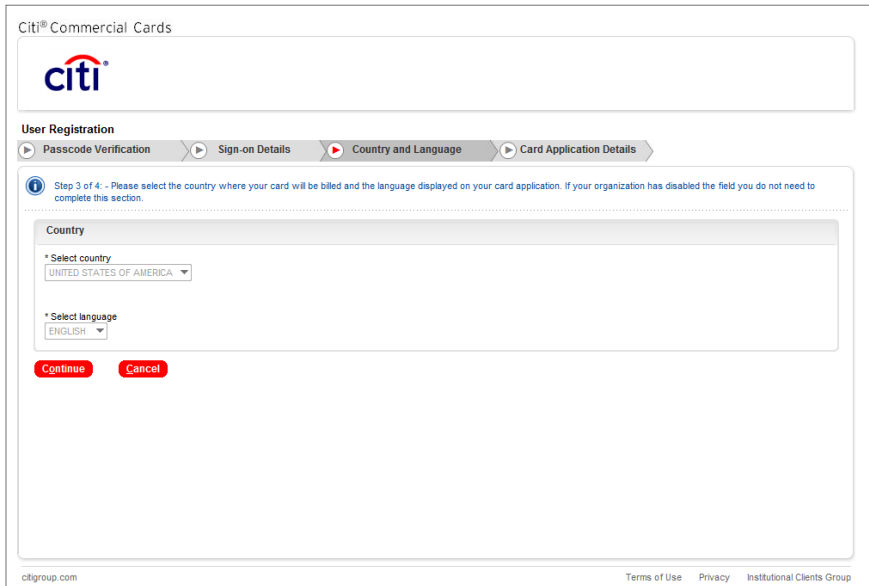
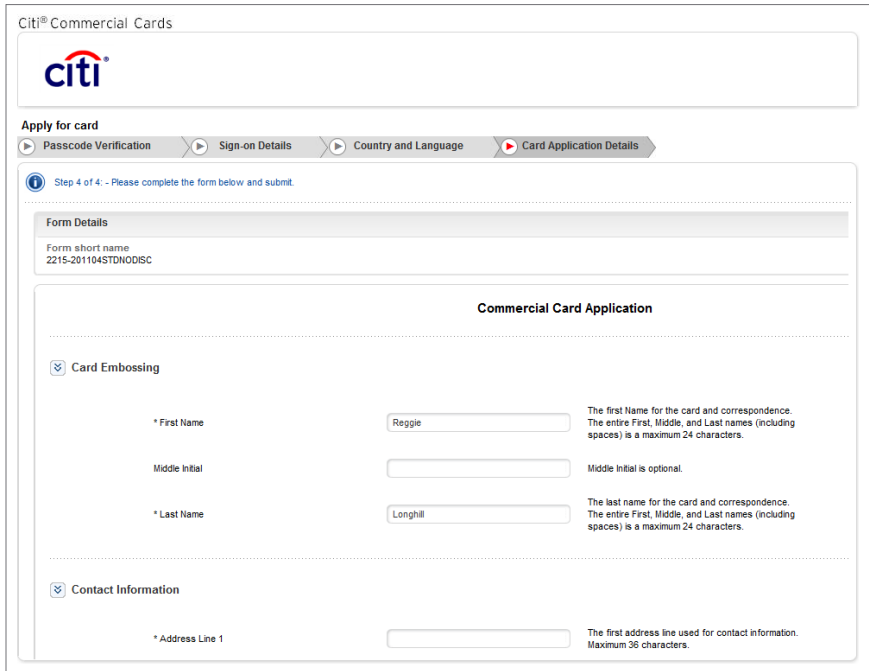
Screen	Step/Action
 <p>CitiManager Site Login Screen</p>	<ol style="list-style-type: none"> 1. Navigate to citimanager.com/login. 2. From the CitiManager Site Login screen, click the Apply for Card link. <p><i>The User Registration – Passcode screen displays.</i></p>

Screen	Step/Action
	<ol style="list-style-type: none"> 3. Select the Invitation Passcode radio button. 4. Click the Continue button. <i>The User Registration – Invitation Passcode/ Inviter's Email screen displays.</i>
<p>User Registration Screen</p>	
	<ol style="list-style-type: none"> 5. In the Invitation Passcode field, type the Invitation Passcode that was provided to you by your Program Administrator. 6. In the Inviter's Email Address field, type the Inviter's Email address that was provided to you by your Program Administrator. 7. Click the Continue button. <i>The User Registration – User Profile screen displays.</i>
<p>User Registration - Invitation Passcode/Inviter's Email Screen</p>	

Screen	Step/Action
	<p>8. To create your CitiManager Site User Profile, complete the required fields indicated by an asterisk (*).</p> <p>Note: A username is not case-sensitive. It must be between six and 50 characters, may contain letters, numbers and special characters, cannot contain spaces, cannot contain only numbers.</p> <p>Passwords are case-sensitive and must have six to 18 characters. At least one letter is required, it must contain at least one number, and cannot be the same as your last three passwords.</p> <p>9. Click the Continue button.</p> <p><i>A confirmation message displays.</i></p> <p>Note: Citi will send an email confirming the registration and user name created.</p>
	<p>10. Click the OK button.</p> <p><i>The User Registration – Country screen displays.</i></p>

User Registration Screen – User Profile

User Registration Screen – ID Confirmation

Screen	Step/Action
 <p>The screenshot shows the 'User Registration' process at Step 3 of 4, titled 'Country and Language'. The Citi logo is at the top left. Below it is a progress bar with four steps: 'Passcode Verification', 'Sign-on Details', 'Country and Language' (which is highlighted with a red play button), and 'Card Application Details'. An information icon and text state: 'Step 3 of 4: - 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.' Below this is a 'Country' section with a dropdown menu set to 'UNITED STATES OF AMERICA' and a 'Select language' dropdown set to 'ENGLISH'. At the bottom are 'Continue' and 'Cancel' buttons. The footer includes 'citigroup.com', 'Terms of Use', 'Privacy', and 'Institutional Clients Group'.</p>	<p>11. The Select country and Select language fields should be pre-populated based on what was entered in the User Profile screen. Click the Continue button.</p> <p><i>The card application form displays.</i></p>
<p>User Registration Screen – Country</p>	
 <p>The screenshot shows the 'Apply for card' process at Step 4 of 4, titled 'Form completion'. The Citi logo is at the top left. Below it is a progress bar with four steps: 'Passcode Verification', 'Sign-on Details', 'Country and Language', and 'Card Application Details' (which is highlighted with a red play button). An information icon and text state: 'Step 4 of 4: - Please complete the form below and submit.' Below this is a 'Form Details' section showing 'Form short name: 2215-201104STDNODISC'. The main section is titled 'Commercial Card Application' and contains two sections: 'Card Embossing' and 'Contact Information', both with checked checkboxes. Under 'Card Embossing', there are three required fields: '* First Name' (with value 'Reggie'), 'Middle initial', and '* Last Name' (with value 'Longhill'). Each field has a small text box explaining the requirements. Under 'Contact Information', there is one required field: '* Address Line 1'. The footer is the same as the previous screen.</p>	<p>12. Complete the required fields in all sections of the application. Required fields are indicated by an asterisk (*).</p>
<p>Apply for Card Screen</p>	

Screen	Step/Action
	<p>13. When you are finished, click the Submit button that displays at the bottom of the screen.</p> <p><i>An application submission confirmation message displays.</i></p>
<p>Apply for Card Screen – Submit</p>	<p>14. Click the OK button.</p> <p><i>The CitiManager Login screen displays.</i></p> <p>Note: The approving Supervisor or Program Administrator will receive an email indicating your application is awaiting their approval.</p>
<p>Apply for Card Screen – Confirmation Message</p>	

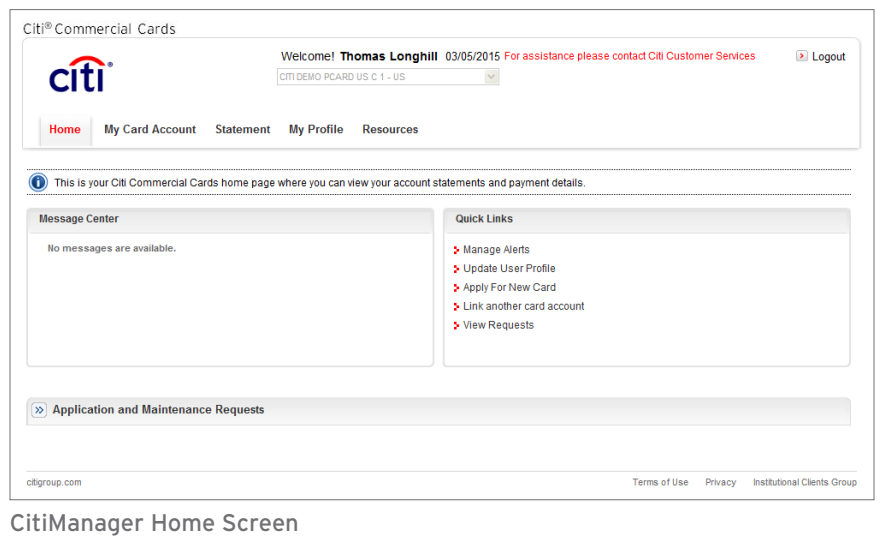
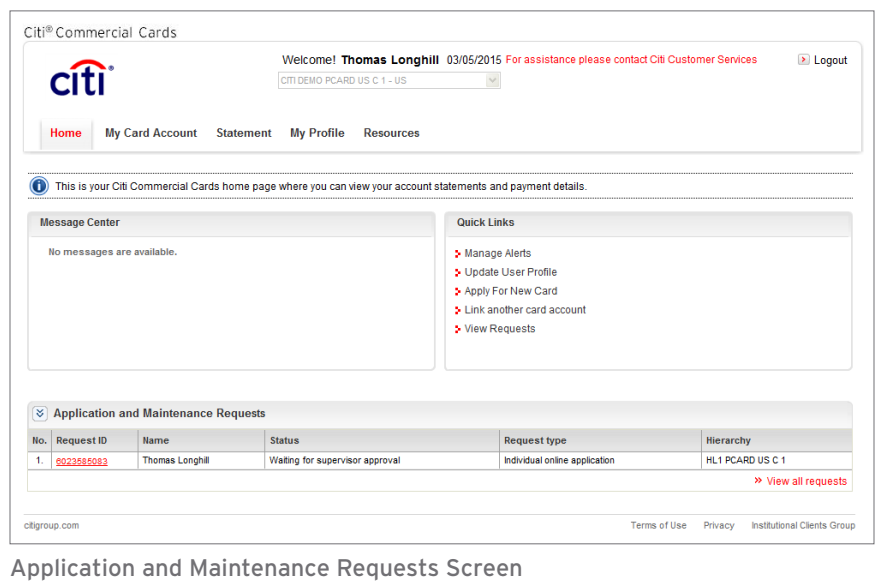
View Application and Maintenance Requests

Key Concepts

If your company uses the CitiManager Site for maintenance, you can view the status of your application or other maintenance requests. From the **View Request** screen, it is also possible to print the request, view the audit log, or recall the maintenance request.

A maximum of five requests will display in the **Application and Maintenance Requests** section.

Step-by-Step Instructions

Screen	Step/Action												
 <p>The screenshot shows the CitiManager Home Screen. At the top, it says 'Citi® Commercial Cards' and 'Welcome! Thomas Longhill 03/05/2015'. Below this is a navigation menu with 'Home', 'My Card Account', 'Statement', 'My Profile', and 'Resources'. A 'Message Center' section indicates 'No messages are available.' To the right, a 'Quick Links' section lists: 'Manage Alerts', 'Update User Profile', 'Apply For New Card', 'Link another card account', and 'View Requests'. At the bottom, there is a button labeled 'Application and Maintenance Requests'.</p>	<p>1. From the CitiManager Home screen, click the expand button to the left of the Application and Maintenance Requests header.</p> <p><i>The application or maintenance request(s) submitted displays along with the status of that request.</i></p>												
 <p>The screenshot shows the 'Application and Maintenance Requests' section expanded. It displays a table with the following data:</p> <table border="1"> <thead> <tr> <th>No.</th> <th>Request ID</th> <th>Name</th> <th>Status</th> <th>Request type</th> <th>Hierarchy</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>8023585083</td> <td>Thomas Longhill</td> <td>Waiting for supervisor approval</td> <td>Individual online application</td> <td>HL1 PCARD US C 1</td> </tr> </tbody> </table> <p>Below the table is a link: » View all requests</p>	No.	Request ID	Name	Status	Request type	Hierarchy	1.	8023585083	Thomas Longhill	Waiting for supervisor approval	Individual online application	HL1 PCARD US C 1	<p>2. To view the status of a request, click the Request ID link for the desired request.</p> <p>Note: To view additional requests, click the View all requests link.</p> <p><i>The View Requests screen displays for the request type selected allowing you to view the completed request form as well as the approval history of the request.</i></p>
No.	Request ID	Name	Status	Request type	Hierarchy								
1.	8023585083	Thomas Longhill	Waiting for supervisor approval	Individual online application	HL1 PCARD US C 1								

Screen	Step/Action
	<p>3. Review the current status of the request in the Request Details section.</p>
	<p>4. It is also possible to print the request, view the audit log or recall the request by clicking the Print, View audit or Recall buttons that display at the bottom of the screen.</p>

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