



CitiManager® Site User Guide

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1. Getting Started in CitiManager. What is CitiManager?

The CitiManager Site is an online tool that allows Non-cardholders to efficiently manage their card programs. Depending on your company's setup, you will be able to:

- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations
- View, approve or reject application
- Perform account maintenance
- Activate and deactivate users
- Set passcodes
- Manage alerts
- Manage your profile

Basic Navigation

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.

The screenshot shows the CitiManager dashboard interface. It features a top header with the CitiManager logo, user information (Firma: FIRMA TESTOWA ECS+ - PL, Witamy! Agnie...), and navigation links (1, 2, 3, 4, 5). A search bar (6) is located below the header. The main dashboard area contains four key metrics: 50% Niezrealizowane wnioski (3/6), 0 Zaległości na rachunku, 12% Nieaktywne karty (7/58), and Niedostępne suma ostatnich operacji. Below these metrics are quick links (8) for 'UTWÓRZ UŻYTKOWNIKA', 'WNIOSKUJ O NOWĄ KARTĘ', 'POWIADOMIENIA', and 'USTAW HASŁO'. The bottom section displays two tables: 'Żądanie wniosku' (9) and 'Wniosek o obsługę' (10). The 'Żądanie wniosku' table lists three requests with their status and type. The 'Wniosek o obsługę' table shows a message: 'Nie masz oczekujących na zatwierdzenie wniosków o obsługę'. A side navigation bar (11-16) is visible on the left side of the dashboard.

Header

1. View your company. If you have access to more than one, you may select another company from the drop-down list.
2. Access My Profile functions or sign out of the CitiManager Site.
3. View the Message Board.
4. Contact the Help Desk for assistance.
5. If you have both Cardholder and Non-cardholder access to the CitiManager Site you can toggle between both using the drop-down list.

Screen Components

6. Complete a search by typing a name or card account number and then select an action from the drop-down list such as Card Accounts or View Requests.
7. View high-level account metrics such as outstanding requests, accounts overdue, total credit remaining, percent un-activated cards and total recent activity.
8. Use the quick links to create a user, apply for new card for yourself, set your personal alerts and set a passcode.
9. View a list of pending Application Requests that are waiting for your review.
10. View a list of pending Maintenance Requests that are waiting for your review

Side Navigation Bar

11. Click the Home icon to return to the Home screen.
12. Click the Manage Users icon to view card account details, view recent and billed statements, view requests, view refund history, perform a user search, print multiple statements and view disputes.
13. Click the Manage Card Program icon to initiate a new account application, run reports, set passcodes.
14. Click the Resources icon to view messages, access FAQs.
15. Click the Tools icon to navigate to CitiManager - Reporting.
16. Click the Alerts icon to manage your alert subscriptions and view the audit log

2. Self-Register as a Non-cardholder (Administrator)

As a Non-cardholder it's possible to self-register for the CitiManager Site so you can manage your card program. In order to self-register, a Registration ID and Registration Passcode are required. Citi will send 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.

The screenshot shows the CitiManager interface for self-registration. At the top, it says 'CitiManager' and 'ZALOGUJ'. Below that, the title is 'Samodzielna rejestracja dla osób nieposiadających karty'. There are four steps listed: 1. Registration ID/Passcode, 2. Contact Information, 3. Sign on Details, and 4. Confirm. The current step is 1. An information icon indicates that fields marked with an asterisk are mandatory. There are two input fields: '* IDENTYFIKATOR REJESTRACJI' and '* KOD DOSTĘPU REJESTRACJI'. At the bottom, there are three buttons: 'KONTYNUUJ' (Continue), 'WYCZYŚĆ' (Clear), and 'ANULUJ' (Cancel).

Step-by-Step Instructions

Step	Action
1	Navigate to www.citimanager.com/login . The CitiManager Site Login screen displays.
2	From the New Users section click the Self Registration for Non Cardholders link. The Registration ID/Passcode screen displays.
3	In the Registration ID field, type the Registration ID supplied in the e-mail sent from the CitiManager Site.
4	In the Registration Passcode field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site.
5	Click the Continue button. The Sign-on Details screen displays.

6	In the Username field, type your desired username. Note: The username requirements display in a window as you type. A checkmark displays when each requirement is fulfilled.
7	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. A checkmark displays when each requirement is fulfilled.
8	In the Confirm Password field, re-type the password.
9	Verify the information in the Zip/Postal Code, Contact Number and User Profile.
10	In the Helpdesk verification answer field, type the answer to the verification question.
11	Click the Continue button. The Confirm screen displays.
12	Review the details and click the Confirm button. A confirmation message displays indicating registration was successful and a confirmation e-mail is sent to the address entered during the registration process.
13	Click the OK button. The CitiManager Site Login screen displays. When you log in for the first time, you will be prompted to select and answer three challenge questions.
14	Type your username and password and click the Sign In button. The Reset Challenge Questions and Answers screen displays. Note: As an extra security measure, each time you log in, you will be asked to answer one of the challenge questions.
15	Select and answer three challenge questions.
16	Click the Save button. The CitiManager Site Home screen displays.

3. Login to the CitiManager Site

In order to access your account information in the CitiManager Site, you must login to the application using 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.

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, enter it on the Onetime Passcode screen in the CitiManager Site 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.

4. Log Out of the CitiManager Site

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 5 minutes of inactivity. If you receive an expiration warning message, you can click the OK button to keep your session open.

5. Retrieve Forgotten Username

If you forget your username, you will need to retrieve it in order to log in to 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 first and last name
- Your country
- Your contact phone number
- The zip code/postal code associated with your user profile (Corporate)
- The e-mail address associated with your user profile

Step-by-Step Instructions

Step	Action
1	Navigate to www.citimanager.com/login . The CitiManager Site Login screen displays.
2	From the Existing Users section, click the Forgot username? link. The Forgot Sign On – Username screen displays.
3	Select the Non-cardholder/Card Applicant role radio button and click the Continue button. The Enter Details screen displays.
4	In the First Name field, type your first name.
5	In the Last Name field, type your last name.
6	From the Country drop-down list, select your country.
7	In the Contact Number field, type your contact phone number. Note: Only numeric values are allowed in this field.
8	In the Zip/Postal code field, type the zip code associated with your user profile.
9	In the E-mail Address field, type the e-mail address associated with your user profile.
10	In the Confirm E-mail Address field, re-type the e-mail address that is associated with your user profile.
11	Click the Continue button. The Challenge Question screen displays.
12	In the challenge question answer field, type the answer to the challenge question and click the Continue button. A confirmation message displays. Note: You have three attempts to answer the challenge question correctly.
13	Click the OK button. The CitiManager Site Login screen displays and the system sends your username to the e-mail address on file.

6. Reset Forgotten Password

If you forget your password, you will need to reset it in order to sign in to the CitiManager Site. To reset your password, the following information is required:

- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

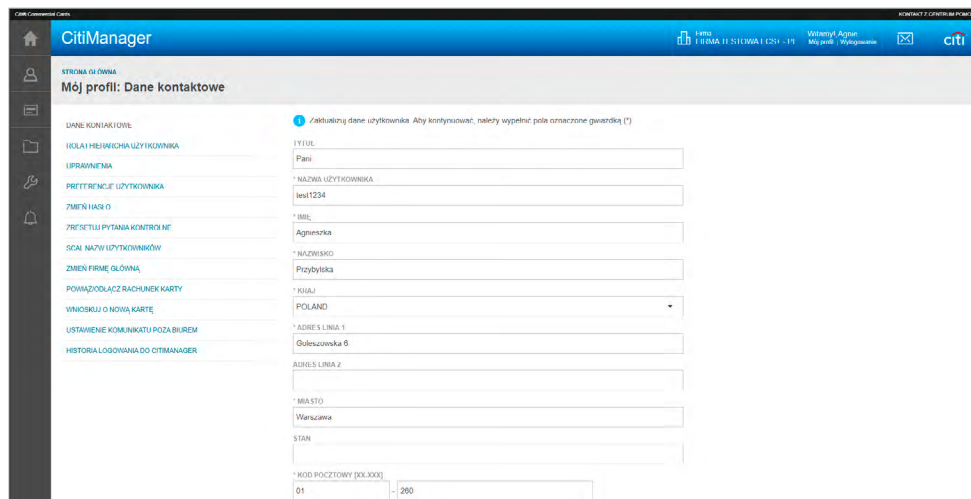
Step-by-Step Instructions

Step	Action
1	Navigate to www.citimanager.com/login . The CitiManager Site Login screen displays.
2	Click the Forgot password? The Forgot Password – Select Role screen displays.
3	Select the Non-cardholder/Card Applicant role radio button and click the Continue button.
4	In the Username field, type your username.
5	In the Zip/Postal Code field, type the zip code associated with your user profile.
6	In the E-mail Address field, type the e-mail address associated with your user profile.
7	In the Confirm E-mail Address field, re-type the e-mail address associated with your user profile.
8	To validate the information entered, click the Continue button. The Forgot Password – Helpdesk Verification screen displays.
9	In the Helpdesk Verification Answer field, type the answer to the verification question and click the Continue button. The Forgot Password – Challenge Question screen displays.
10	In the challenge question answer field, type the answer to the challenge question and click the Continue button. A confirmation message displays indicating a temporary password has been created and sent to your e-mail address.
11	Click the OK button. The CitiManager Site Login screen displays.

7. My Profile Overview

The My Profile screen is used to access links that are used to maintain your profile information depending on your entitlements and company's setup:

- View and update CitiManager Site contact details
- View user role, hierarchy and entitlements
- View user preferences
- Change password
- Reset challenge questions
- Merge usernames
- Change your primary company
- Apply for new card



Step-by-Step Instructions

Step	Action
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.

8. Update Contact Information

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

- Username
- Address
- Mobile phone number
- User profile e-mail address

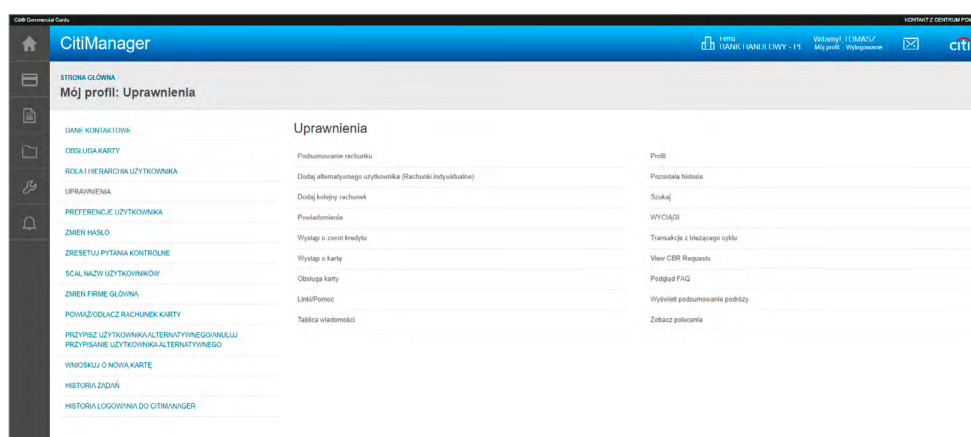
Step-by-Step Instructions

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.

9. View Entitlements

CitiManager is an entitlement-based application. Entitlements define which features and functions users have access to in the CitiManager Site. You can view the entitlements and tools assigned to you based on your role. Changes to your entitlements must be completed by another administrator. Examples of entitlements that may be assigned to you include:

- Card maintenance
- Activate/deactivate users
- View authorizations
- Approve requests
- Pending user requests
- Update user
- 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. All the entitlements you have been assigned display.

10. Update User Preferences

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

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

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.

11. Change Password

Passwords in the CitiManager you can change it at any time.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site header, click the My Profile link that displays under your name. The User preferences 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 your password. A checkmark displays when the requirement is 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.

12. Reset Challenge Questions

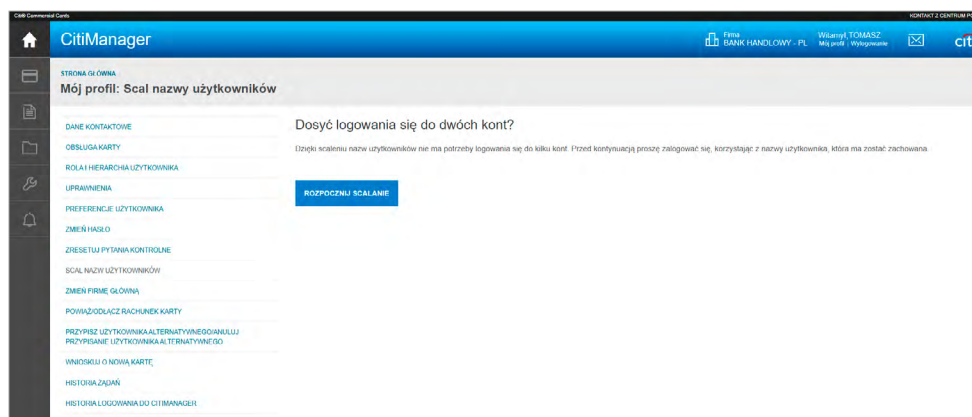
Since the CitiManager Site requires dual authentication you will need to answer an additional security question after you enter your username and password during the log in process. You must select and answer three challenge questions when initially registering for the CitiManager Site and when you reset 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 will 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 User preferences 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.
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.
7	Click the Save button. The CitiManager Home screen displays.

13. Merge Usernames

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 User preferences 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.
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.

14. Change Primary Company

As a Non-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. 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 User preferences 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.

15. Apply for a New Card

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 administrator. You will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Non-cardholder. Once your card application is approved, the account will be linked to your CitiManager Site.

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. Note: You can also click the Apply for New Card link that displays on the CitiManager Home Screen. If you click this link, proceed to Step 4.
2	Click the Apply for New Card link. The Apply for New Card screen displays.
3	Click the Begin button. The Apply for New Card – Passcode Verification screen displays.
4	In the Invitation Passcode field, type the Invitation Passcode that was sent to you by your administrator.
5	In the Invitation E-mail Address field, type the inviter's e-mail address that was sent to you by your administrator.
6	Click the Continue button. The Country screen displays.
7	Select the country of the currency where the card will be billed from the drop-down list. Note: The countries displayed from the drop-down list are based on your company's setup.

8	Click the Continue button. The card Application form displays.
9	Complete the required fields on the application. Note: If you are unable to complete the required fields, you can also save the application as a draft and return to it later.
10	Click the Submit button. A confirmation message displays at the top of the screen indicating the application has been submitted for processing.

16. Manage Users

You can search for Cardholder accounts that reside in your assigned hierarchies. Non-cardholders can only access accounts within their span of control. Once the search is complete, you may view:

- Balance, credit limit and payment information
- Links to recent transactions and previous statements
- Card contact information

The Card Details screen is also a launching point if you want to view recent transactions, billed statements/transactions or perform other actions such as viewing disputes if they were submitted through the CitiManager Site, viewing the account hierarchy or setting alerts for the Cardholder.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link. The Search for Cards screen displays.
2	To perform a search, type the desired search criteria in the Card First Name, Card Last Name or Card Number fields and click the Search button.
3	From the Card Number column, click the link for the card account you wish to view. The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements and the card contact details. Note: To navigate back to the Search Results screen, click the Back button that displays at the bottom of the screen.
4	From the Card Details screen you can also navigate to the following actions on the account: <ul style="list-style-type: none"> • Depending on your company's setup you can View Account Information (account communications), View Disputes, View Hierarchy and Update Alerts for the account by clicking the desired link that displays on the right-side of the screen. • To view recent transactions or previously billed transactions for the selected card account, click the Recent icon or the desired statement date icon.

17. View Disputes

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

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

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link. The Search for Cards screen displays.
2	To perform a search, type the desired search criteria in the Card First Name, Card Last Name or Card Number fields and click the Search button.
3	From the Card Number column, click the link for the card account with the dispute you wish to view. The Card Details screen displays.
4	From the right side of the screen, click the View Disputes link. The View Disputes screen displays any disputes associated with the selected card account. Note: A message displays if there are no disputes for this account.
5	To view additional transaction dispute detail, click the ellipsis (...) link that displays on the right-side of the row you wish to expand. The row expands and the dispute initiation date, the name of the person initiating the dispute and reference number display.

18. View and Download Statements

You can view a Cardholder's current statement or a statement from previous months. You can also view recent transactions for a Cardholder that have posted to the account but have not yet been billed to a statement. A list of transactions also displays and at the bottom the screen and you can expand each to view additional detail that may have been sent to Citi from a merchant. Transaction detail will include the original currency amount, currency exchange rate and the conversion amount that was posted. Additionally, you can initiate a dispute if the transaction meets the requirements. You can download and print transactions for individually or centrally billed accounts.

Step-by-Step Instructions - View Statements and Transactions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link. The Search for Cards screen displays.
2	To perform a search, type the desired search criteria in the Card First Name, Card Last Name or Card Number fields and click the Search button.
3	From the Card Number column, click the link for the card account you wish to view. The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements and the card contact details.

4	From the Statements section, click the icon for the statement date you wish to view. The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.
5	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 icon. Click the Advanced Search link to access additional search criteria. The transactions are filtered by the search criteria entered.
6	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 detail displays.

Step-by-Step Instructions - Download Statements

Step	Action
1	From the Statements screen, click the Download link that displays above the Billed Transactions 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 indicating a file may 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.

19. Dispute a Transaction

It is possible to dispute a transaction if necessary such as when there are duplicate charges. You can initiate disputes for either recent or billed 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.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Card Accounts link. The Search for Cards screen displays
2	To perform a search, type the desired search criteria in the Card First Name, Card Last Name or Card Number fields and click the Search button.
3	From the Card Number column, click the link for the card account you wish to view. The Card Details screen displays the card overview including balance and payment history, links to recent and previous statements, aging of balance information and the card contact details.
4	From the Statements section, click the icon for the statement date you wish to view. You can choose to view recent transactions or billed transactions for a particular statement date. The Statements screen displays for the month selected. Billed transactions display at the bottom of the screen.
5	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.
6	To initiate a dispute for a transaction, click the ellipsis (...) link that displays on the right-side of the transaction row you wish to expand. The row expands and additional transaction detail and Attach and Dispute buttons display.

7	From the expanded row, click the Dispute button. The Dispute Transactions – Dispute Details screen displays. If the transaction selected does not fulfil the dispute rules a message displays indicating you should contact Customer Service for assistance. Note: Multiple transactions are not allowed to be disputed at the same time.
8	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.
9	Based on the dispute reason selected, complete any additional fields requesting additional information such as an amount.
10	When you are finished, select the verification checkbox to certify the information provided is accurate.
11	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.
12	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.
13	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.

20. Manage Application Requests (View Requests)

You can search for and view all online application and maintenance requests submitted through the CitiManager Site. Non-cardholders can approve or reject the user requests as well as print requests, view the audit log and add comments to a request. From the View Request screen you can also:

- View the Maintenance Audit Log
- Delete an application request if entitled
- Download applications

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, a Non-cardholder must have that entitlement assigned to them.

Request Status Description

Request Status	Description
Approved	Request was approved by the non-cardholder and will be processed by Citi.
Draft	Request was saved but not submitted.
More Information Requested	Request was sent back by the approver requesting additional information.
Processed	Request was processed and a card will be issued.
Rejected	Request has been rejected.
Waiting for Approval	Online Card Application request is awaiting non-cardholder approval.
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.
Withdrawn	Applicant has withdrawn the application request.
Expired	Request was not handled within a predefined time period.
Pending Authentications	Maintenance request was submitted but an Online Authorization Code (OAC) is sent to him/her.

Step-by-Step Instructions - View/Approve/Reject a Request

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the View Requests link, OR From the CitiManager Site Home screen Application Request or Maintenance Request sections, click desired Request ID link and continue to Step 5.
2	To perform a search, type the desired search criteria in the Request ID, First Name or Request ID and click the Search button.
3	To view a request, from the Request ID column, click the link for the request you wish to view. The View Request screen displays.
4	Review the request details.
5	When you are finished reviewing the request, select either the Approve or Reject radio button. Note: If request is rejected, you are required to type a reason for the rejection in Comments field and then click the Save comment link. By default, the Allow for Resubmit checkbox is selected.
6	When you are finished, click the Submit button. A confirmation message displays.

Step-by-Step Instructions - Download Applications

Step	Action
1	From the View Request screen, click the Download link displayed on the right-side of the screen. Note: To navigate to the View Request screen, refer to Steps 1-4 of the View/ Approve/Reject a Request topic. A message displays indicating the download file may have been cached locally to your computer.
2	Click the OK button. The browser document options window displays. The location of the Save or Open options vary based on your browser settings.
3	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.

21. View Refund History

You can view the following information for Cardholder credit balance refund requests:

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

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Refund History link. The Refund History – Search screen displays.
2	To perform a search, type the desired search criteria in the Account Number, First Name or Last Name or Username fields and click the Search button.
3	From the Account Number column, click the link for the card account you wish to view. The Refund History screen displays.

22. Search for User and View Details

You can search for users (Cardholder and Non-cardholder) and then view their account details such as:

- Card details
- Contact details
- User roles
- User entitlements

From the User Details screen you can also use the links that display on the right-hand side to:

- Reset a user's password
- Deactivate a user

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. The Search for Users screen displays.
2	To perform a search, type the desired search criteria in the First Name, Last Name or Username fields and click the Search button.
4	From the Username column, click the link for the user you wish to view. The User Details screen displays.
5	As necessary, click the link for the desired function that displays on the right side of the screen.

23. Reset a User's Password

You can initiate a password reset for a user's profile. Once you initiate the reset process, an automated message is sent to the e-mail associated with the profile that will allow the user to reset their password.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. The Search screen displays.
2	To narrow your search, type the desired search criteria in the First Name, Last Name or Username fields and click the Search button.
3	From the Username column, click the link for the user you wish to view. The User Details screen displays.
4	From the right-side of the User Details screen, click the Reset Password link. A confirmation message displays verifying you want to reset the password for that user.
5	Click the Reset button. A confirmation message displays at the top of the screen. An automated e-mail with the password reset steps will be sent to the e-mail associated with the user's profile.

24. Activate/Deactivate User

You can activate an existing username that was deactivated due to lack of use, or manually deactivated by a Non-cardholder. You can also manually deactivate a user. Usernames automatically deactivate if a user fails to log in for 100 consecutive days. When manually activating or deactivating an account you are required to enter the reason for activating or deactivating the username.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. The Search for Users screen displays.
2	To narrow your search, type the desired search criteria in the First Name, Last Name or Username fields and click the Search button.
3	From the Username column, click the link for the user you wish to activate or deactivate. The User Details screen displays the Card Details, Contact Details, User Role(s) and User Entitlements sections.
4	From the right side of the screen, click the Activate User or Deactivate User link.
5	In the Reason for activation/deactivation text entry field, type the reason for the activation/deactivation.
6	Click the Activate or Deactivate button.

25. Update User – Personal and Contact Details

It is possible to update a user's personal details and contact details. Details that can be updated include:

- Personal Details – Username, first and last name
- Contact Details – Address, phone number, e-mail address

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the User Search link. The Search for Users screen displays.
2	To narrow a search, type the desired search criteria in the First Name, Last Name or Username fields and click the Search button.
3	From the Username column, click the link for the user you wish to update. The User Details screen displays the card overview including balance and payment history, links to recent and previous statements, aging of balance information and the card contact details.
4	Click the Update User link that displays on the right-side of the screen. The Update User screen displays the Personal Details, Contact Details, User Role(s) and Hierarchy, and Entitlements.
5	To change personal details: a) From the Personal Details section header, click the (+) plus sign icon to expand the section. b) Maintain the username and first and last name as necessary.
6	To change contact details: a) From the Contact Details section header, click the (+) plus sign icon to expand the section. b) Maintain the address, phone numbers and e-mail address as necessary.
7	When you are finished making all changes, click the Continue button that displays at the bottom of the screen. The Confirm Details screen displays.
8	Verify your changes and click the Save button. A confirmation message displays at the top of the screen.
9	Click the OK button. The Search for Users screen displays.

26. Print Multiple Statements

You can download and print multiple Cardholder statements from previous months. You can download statements for individually or centrally billed accounts. Once the PDF document is open, you can print it by selecting Print from the File menu.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Users icon and click the Print Multiple Statement link. The Search for Statements screen displays.
2	To perform a search, type the desired search criteria in the First Name, Last Name and then From Date and To Date fields and click the Search button.
3	Select the checkboxes for the statements you wish to download and click the Download Statements button displayed at the bottom of the screen. It is possible to select up to 2000 transactions for a single download request. You can keep track of how many transactions and statements have been selected by looking to the right of the Download Statements button. A message displays indicating the file may be saved to your computer.
4	Click the OK button. The browser document options window displays.
5	From the browser document option window, click the Open button. The document opens in the PDF format. Note: Once the document is open, you can print it by selecting Print from the File menu.

27. Set Passcode and Pre-fill Application Form Data

Once the application criteria for your company has been determined and the application has been created, Citi will attach the application to the appropriate card programs and business units within your company in the CitiManager Site. A Non-cardholder can set a security passcode for online applications initiated by a Cardholder. This passcode is sent to each card applicant by the Non-cardholder. The card applicant will also be sent the inviter's e-mail address, which is required to access the application. The inviter's e-mail address is the e-mail address of the user who sets the passcode.. Application passcodes can be created with or without an expiration date.

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Manage Card Program icon and click the Set Passcode link. The Set Passcode & Prefill - Set/Change Hierarchy screen displays.
2	From the Select Hierarchy section, select the radio button for the hierarchy where the passcode will be set. Click the (+) plus sign icon to expand the hierarchy.
3	Once the hierarchy for the passcode is selected, click the Save button. The Set/Change Workflow screen displays. Note: Your application workflow displays in the Workflow section. The workflow defines who completes, submits and approves/rejects applications before they are sent to Citi for processing.
4	In the Passcode field, type the desired passcode. Note: There are no character restrictions for this field.
5	From the Passcode Expiration section, select the radio button for the desired expiration option. If you select the Allow passcode to expire option, click in the date field and select an expiration date from the calendar.
6	Click the Continue button. The Prefill Data screen displays.
7	From the Country drop-down list, select the applicable country.
8	Click the Continue button. The Preview and Confirm screen displays.
9	Once you are finished previewing, click the Set Passcode button. The Passcode and form data confirmation message displays at the top of the screen.

28. Resources

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.

29. Search for Non-cardholders

You can search for Non-cardholders and view the following information:

- Hierarchy Name
- Role
- Full Name
- User Profile E-mail Address

Step-by-Step Instructions

Step	Action
1	From the CitiManager Site side navigation bar, position your mouse over the Resources icon and click the Search link. The Search for Users screen displays.
2	To perform a basic search, use the First Name, Last Name or Username fields and click the Search button. Note: To search by Role and Hierarchy Name, click the More Options link. The search results display based on the search criteria entered.

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