

Online Applications Quick Start Guide Cardholders

March 2015

Table of Contents

[Apply for Card Using an Invitation Passcode](#)2

[View Application and Maintenance Requests.....](#)7

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.

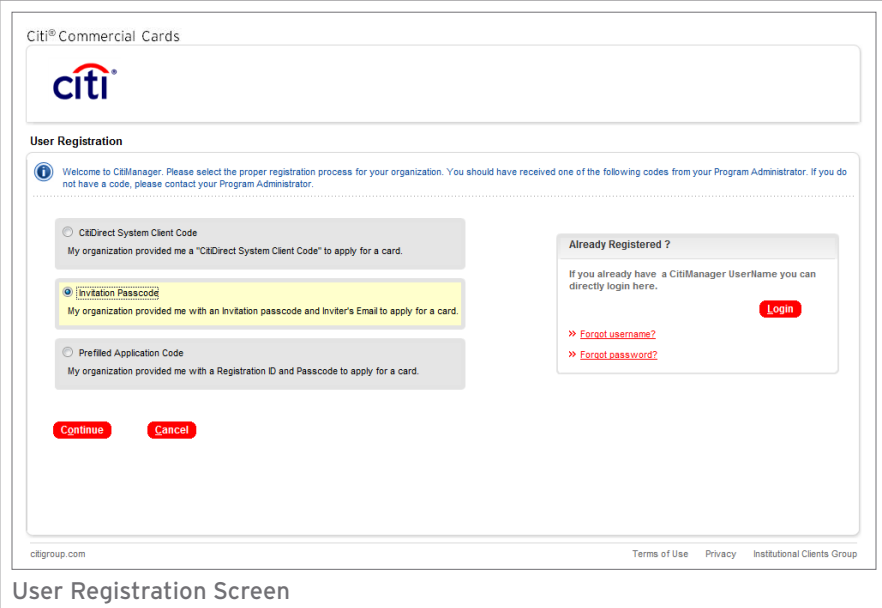
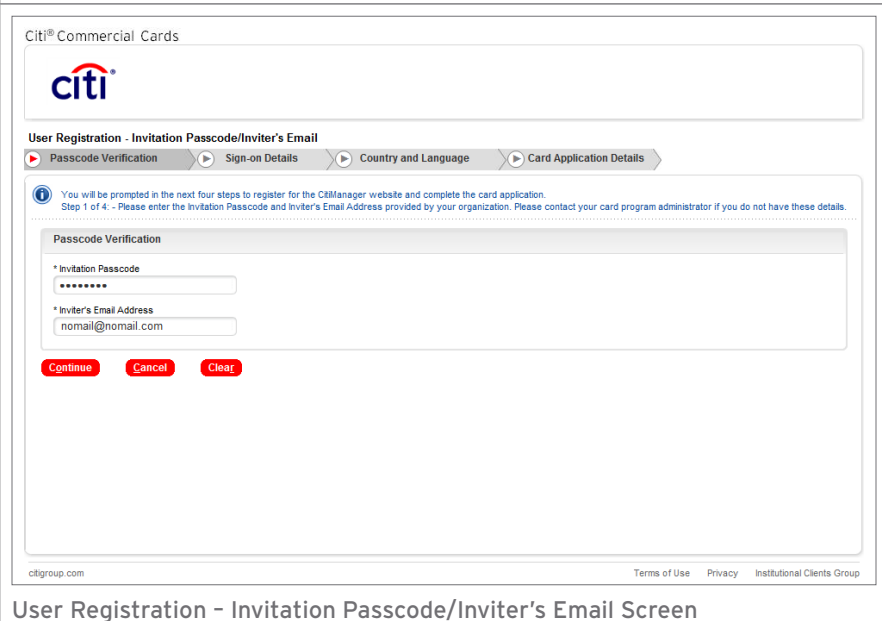
You will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or Program Administrator.

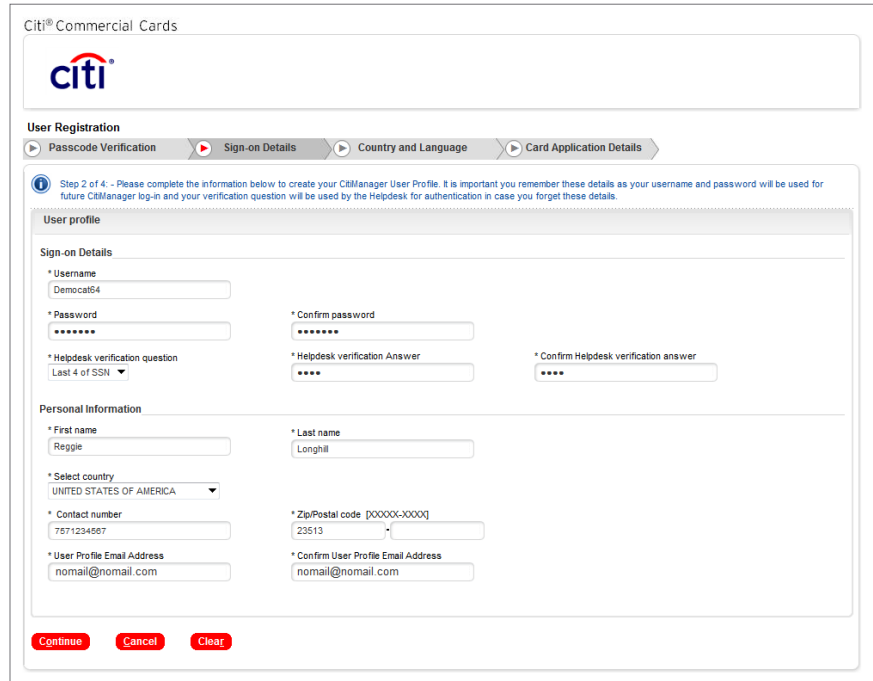
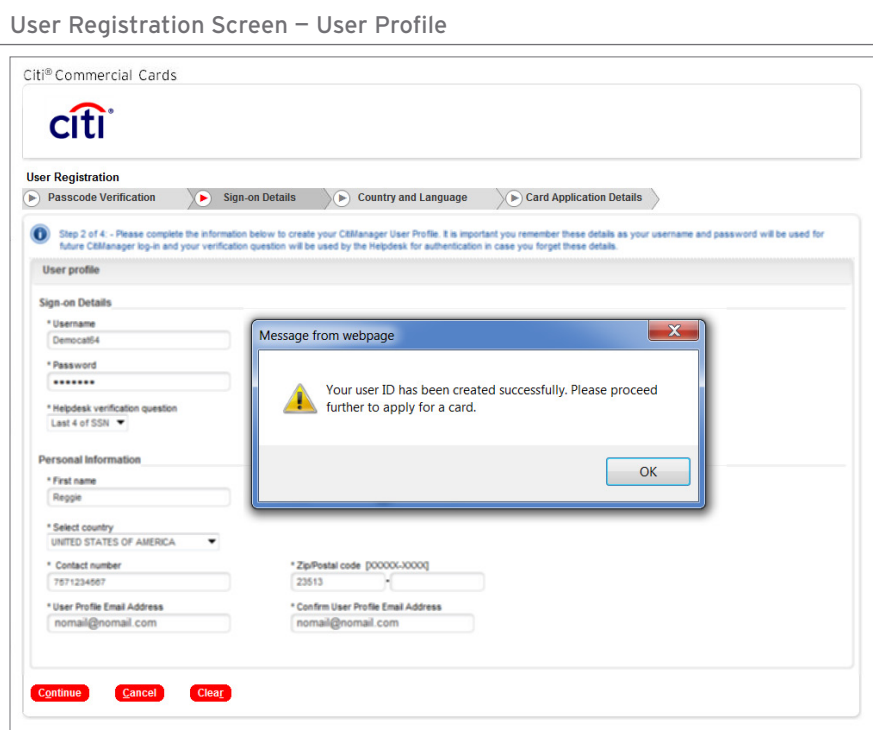
You can view the status of your application in the CitiManager® Site using the username and passcode created when you apply for a new card.

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

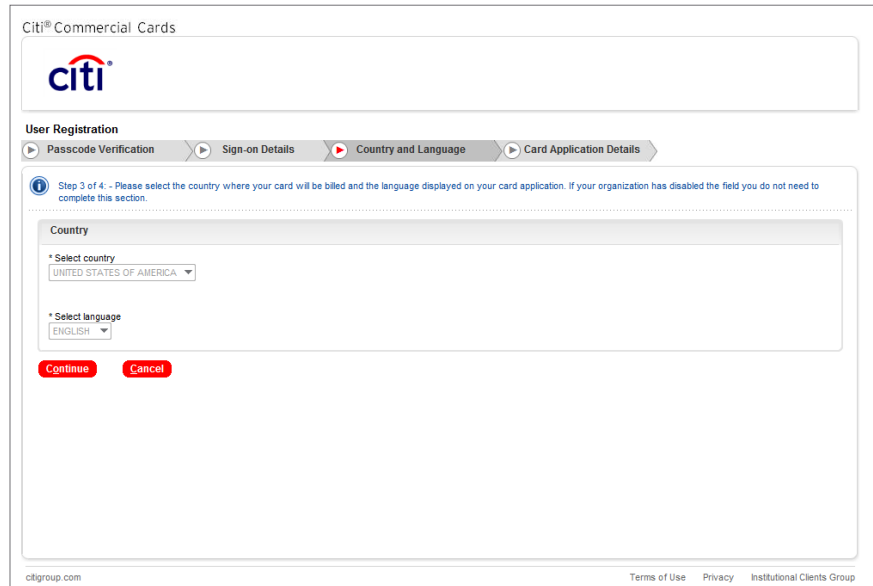
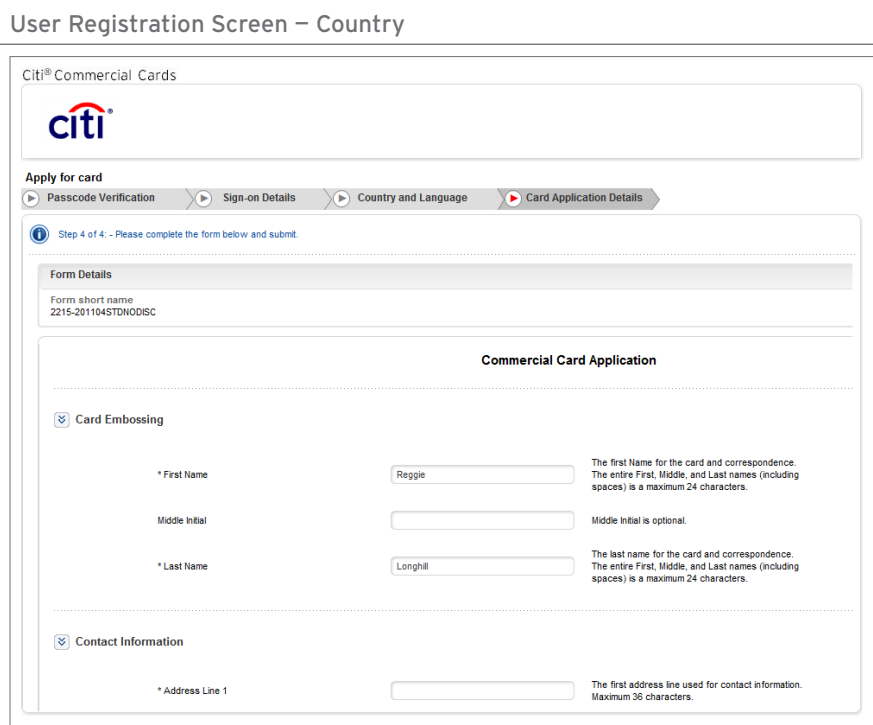
| Screen | Step/Action |
|--|--|
|  | <ol style="list-style-type: none"> 1. Navigate to citimanager.com/login. 2. From the CitiManager Site Login screen, click the Apply for Card link. <p><i>The User Registration – Passcode screen displays.</i></p> |
| CitiManager Site Login Screen | |

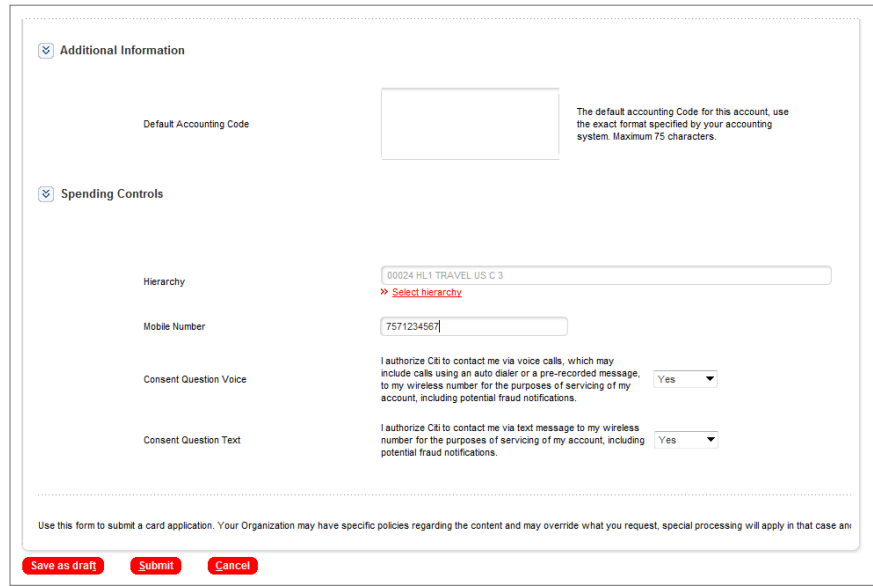
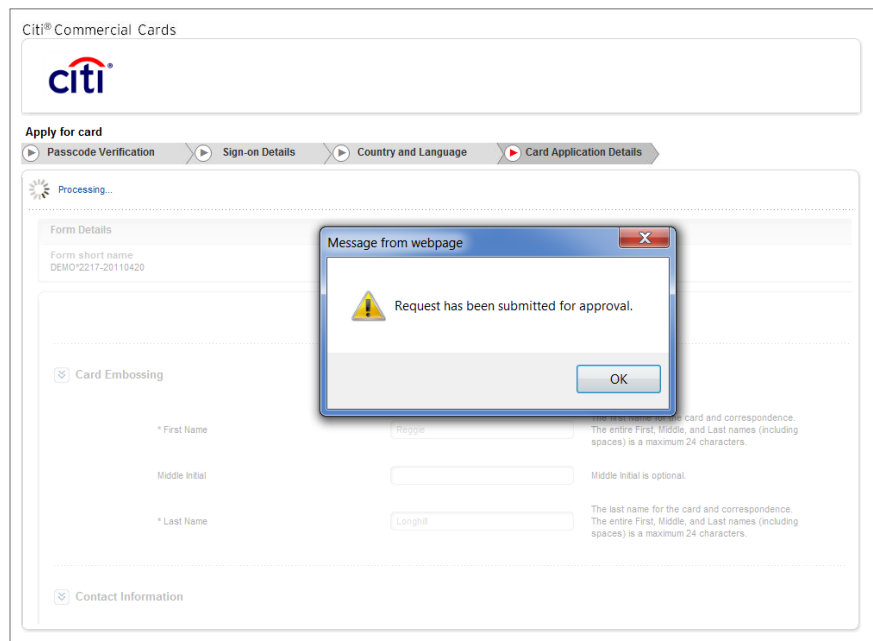
| Screen | Step/Action |
|--|--|
|  <p>The screenshot shows the 'User Registration' screen for Citi Commercial Cards. It features the Citi logo at the top. Below it, a message states: 'Welcome to CitiManager. Please select the proper registration process for your organization. You should have received one of the following codes from your Program Administrator. If you do not have a code, please contact your Program Administrator.' There are three radio button options: 'CitiDirect System Client Code', 'Invitation Passcode' (which is selected and highlighted in yellow), and 'Prefilled Application Code'. To the right, there is an 'Already Registered?' section with a 'Login' button and links for 'Forgot username?' and 'Forgot password?'. At the bottom, there are 'Continue' and 'Cancel' buttons. The footer includes 'citigroup.com', 'Terms of Use', 'Privacy', and 'Institutional Clients Group'.</p> | <ol style="list-style-type: none"> 3. Select the Invitation Passcode radio button. 4. Click the Continue button. <p><i>The User Registration – Invitation Passcode/ Inviter's Email screen displays.</i></p> |
|  <p>The screenshot shows the 'User Registration - Invitation Passcode/Inviter's Email' screen. It features a progress bar with four steps: 'Passcode Verification' (active), 'Sign-on Details', 'Country and Language', and 'Card Application Details'. Below the progress bar, a message states: 'You will be prompted in the next four steps to register for the CitiManager website and complete the card application. Step 1 of 4 - Please enter the Invitation Passcode and Inviter's Email Address provided 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' (containing 'nomail@nomail.com'). At the bottom, there are 'Continue', 'Cancel', and 'Clear' buttons. The footer includes 'citigroup.com', 'Terms of Use', 'Privacy', and 'Institutional Clients Group'.</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. <p><i>The User Registration – User Profile screen displays.</i></p> |

| Screen | Step/Action |
|--|--|
|  <p>The screenshot shows the 'User Registration' screen, specifically the 'User profile' section. It includes fields for 'Sign-on Details' (Username, Password, Confirm password, Helpdesk verification question, and answer) and 'Personal Information' (First name, Last name, Select country, Contact number, Zip/Postal code, User Profile Email Address, and Confirm User Profile Email Address). The 'Continue' button is highlighted in red.</p> | <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>The screenshot shows the 'User Registration' screen with a confirmation message box overlaid. The message box states: 'Your user ID has been created successfully. Please proceed further to apply for a card.' with an 'OK' button. The background shows the same registration form as the previous screen.</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' screen for Citi Commercial Cards. It is titled 'Citi® Commercial Cards' and features the Citi logo. Below the logo is a progress bar with four steps: 'Passcode Verification', 'Sign-on Details', 'Country and Language', and 'Card Application Details'. The 'Country and Language' step is currently active. The main content area is titled 'Country' and contains two dropdown menus: '* Select country' (set to 'UNITED STATES OF AMERICA') and '* Select language' (set to 'ENGLISH'). At the bottom of this section are two buttons: 'Continue' and 'Cancel'. 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>The screenshot shows the 'Apply for Card' screen for Citi Commercial Cards. It is titled 'Citi® Commercial Cards' and features the Citi logo. Below the logo is a progress bar with four steps: 'Passcode Verification', 'Sign-on Details', 'Country and Language', and 'Card Application Details'. The 'Card Application Details' step is currently active. The main content area is titled 'Form Details' and shows a 'Form short name' of '2215-201104STDNODISC'. Below this is a section titled 'Commercial Card Application' which contains two sub-sections: 'Card Embossing' and 'Contact Information'. The 'Card Embossing' section has three text input fields: '* First Name' (containing 'Reggie'), 'Middle Initial' (empty), and '* Last Name' (containing 'Longhill'). The 'Contact Information' section has one text input field: '* Address Line 1' (empty). Each input field has a corresponding help text to its right. The footer is empty.</p> | <p>12. Complete the required fields in all sections of the application. Required fields are indicated by an asterisk (*).</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

The screenshot shows the CitiManager Home Screen. At the top, it says "Citi® Commercial Cards". Below this is the Citi logo. To the right of the logo, it says "Welcome! Thomas Longhill 03/05/2015" and "For assistance please contact Citi Customer Services". There is a "Logout" button. Below this is a dropdown menu showing "CITI DEMO PCARD US C 1 - US". There are navigation links: "Home", "My Card Account", "Statement", "My Profile", and "Resources". Below these links is a message: "This is your Citi Commercial Cards home page where you can view your account statements and payment details." There are two main sections: "Message Center" and "Quick Links". The "Message Center" says "No messages are available." The "Quick Links" section has five links: "Manage Alerts", "Update User Profile", "Apply For New Card", "Link another card account", and "View Requests". At the bottom, there is a section for "Application and Maintenance Requests" which is currently collapsed. The footer shows "citigroup.com", "Terms of Use", "Privacy", and "Institutional Clients Group".

CitiManager Home Screen

1. From the **CitiManager Home** screen, click the expand button to the left of the **Application and Maintenance Requests** header.
The application or maintenance request(s) submitted displays along with the status of that request.

The screenshot shows the CitiManager Home Screen with the "Application and Maintenance Requests" section expanded. It displays a table with the following data:

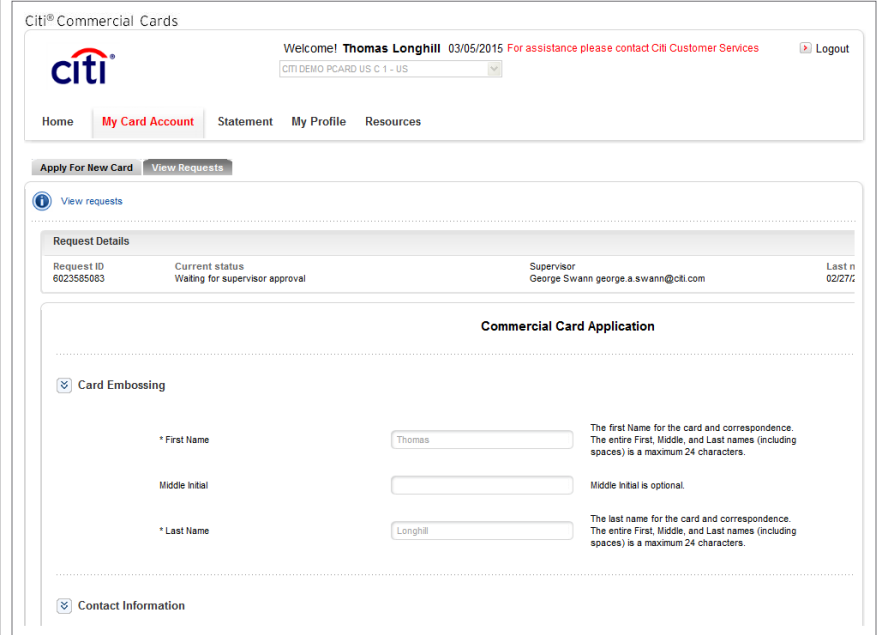
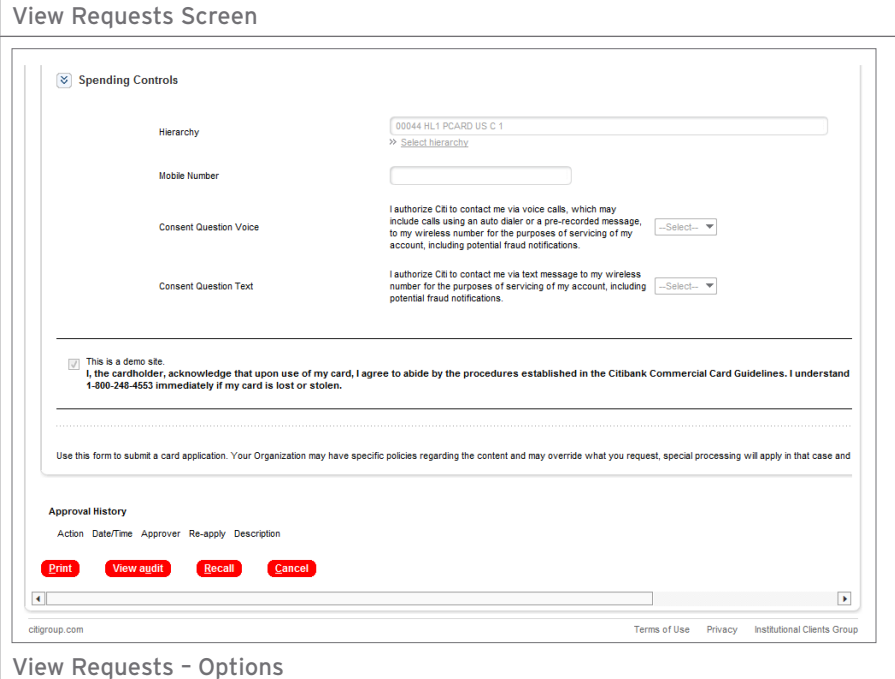
| No. | Request ID | Name | Status | Request type | Hierarchy |
|-----|----------------------------|-----------------|---------------------------------|-------------------------------|------------------|
| 1. | 6023585083 | Thomas Longhill | Waiting for supervisor approval | Individual online application | HL1 PCARD US C 1 |

Below the table, there is a link: "» View all requests". The footer shows "citigroup.com", "Terms of Use", "Privacy", and "Institutional Clients Group".

Application and Maintenance Requests Screen

2. To view the status of a request, click the **Request ID** link for the desired request.
Note: To view additional requests, click the **View all requests** link.
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.

Application and Maintenance Requests Screen

| 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> |

