CitiManager®

Employee / Cardholder

Guide

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Log In and Sign Out of CitiManager
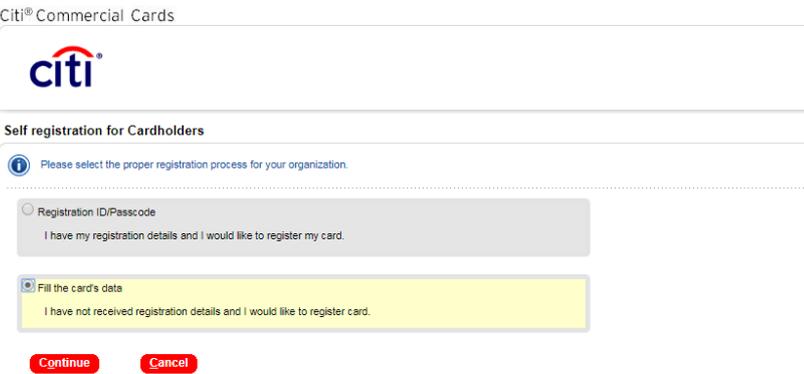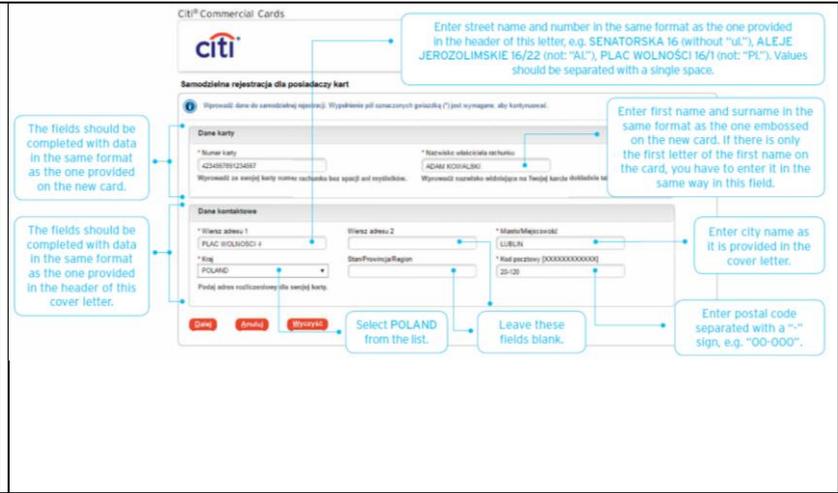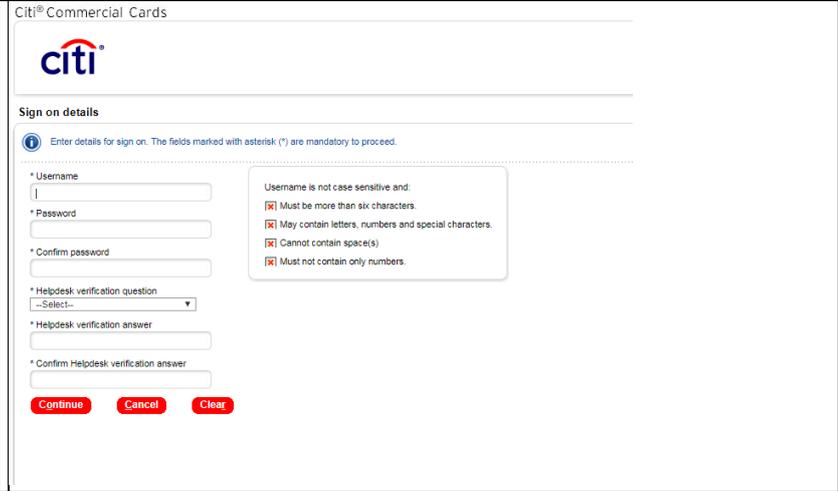
Key Information

To log in to the CitiManager platform for the first time, please follow the information in the cover letter that you have received along with your card. In order to sign up, you'll need your card number and the data from the cover letter. Afterwards, each time you're logging in to desktop or mobile version, you'll have to provide your username and password that you created when signing up.

When you are done using CitiManager, please sign out using the Sign Out button. Do not close the application with Close (X) button in your browser.
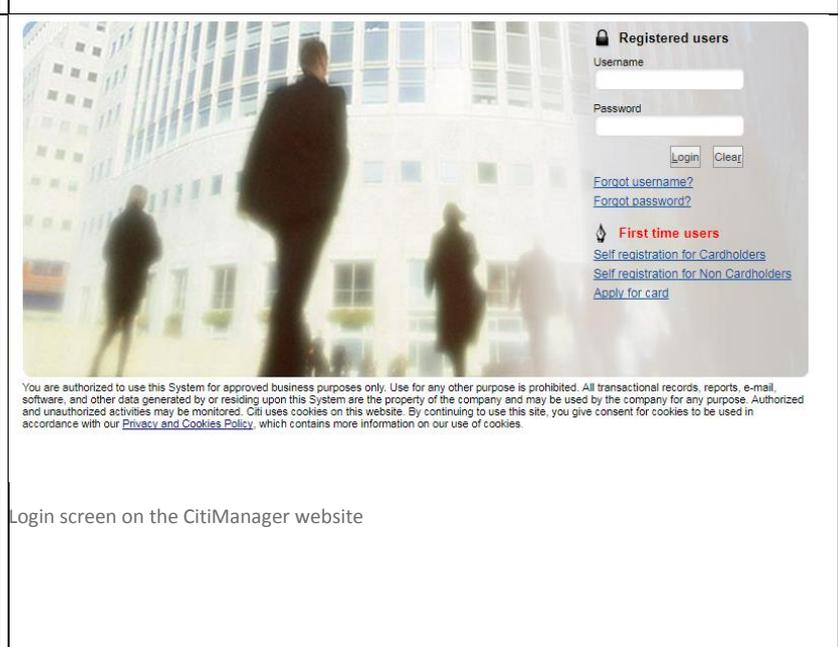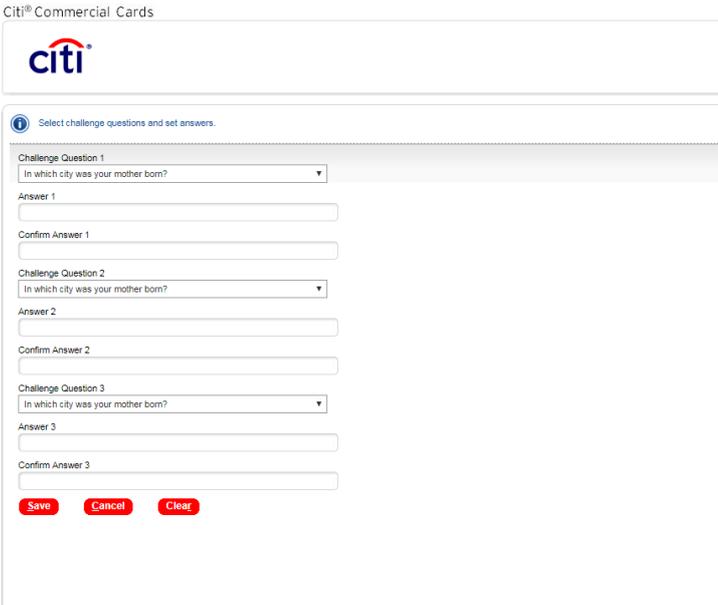
Step-by-Step Instructions

First Log In

Screen	Step/Action
Login screen on the CitiManager website	1. Go to home.cards.citidirect.com. 2. The first time you log in, select New Users – Self registration for Cardholders.
(Self registration for Cardholders screen)	3. Select Fill the card's data. 4. Click on Continue.

1. Fill in the card's data as shown in the cover letter attached to the card.

2. Once you have completed the card's data, click on Continue.

3. Select your login and set a password to your profile. When done, click on Continue. In the next window, confirm your profile registration by clicking on Confirm.

   Your card has been registered.

Registered Users Log In

Screen	Step/Action

Login screen on the CitiManager website
	1. Go to
	
	   home.cards.citidirect.com.
	
	2. On CitiManager Login page,
	
	   type in your username and password
	
	   in the corresponding fields.
	
	3. Click on Login.
	
	   The Security Question screen will open.

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4. The first time you log in, set your the security questions.

5. On subsequent logins, you will be asked to answer the security question.

6. Click on Continue.

   CitiManager Home Screen will appear. You have successfully logged in to CitiManager.

Sign Out

7. To sign out of CitiManager, click the Sign Out button which is located in the upper-right corner on every screen.

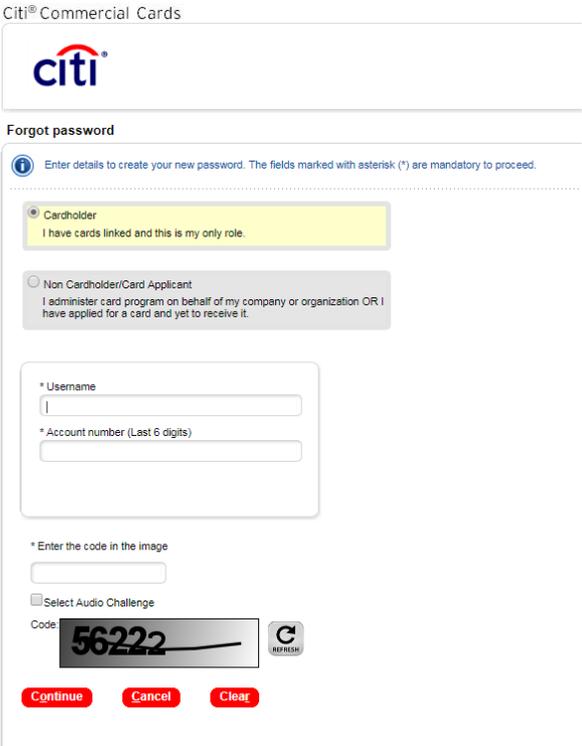   *CitiManager Login Screen will open.*

Reset a forgotten password

Key Information
If you have forgotten your CitiManager login password, it is necessary to reset your password. To reset your password, the following information is required:

- valid username,

- last 6 digits of your card number.

Step-by-Step Instructions

Screen	Step/Action
	1. Go to home.cards.citidirect.com. 2. On the CitiManager Login page, click on *Forgot password?* link. *The Forgot password screen displays.*

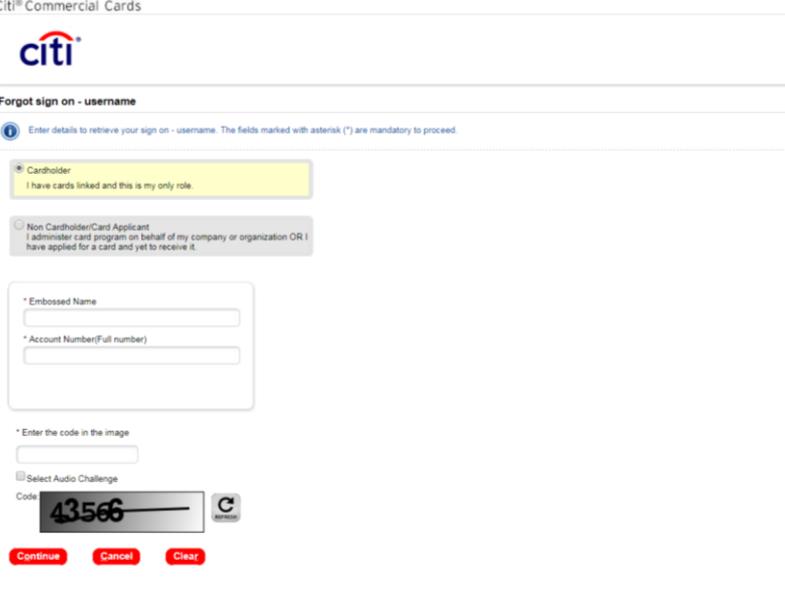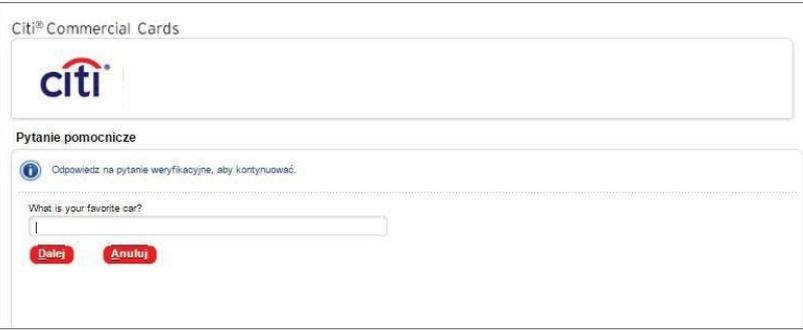| Screen	Step/Action
Citi® Commercial Cards **citi** **Forgot password** ⓘ Enter details to create your new password. The fields marked with asterisk (*) are mandatory to proceed. ⦿ Cardholder I have cards linked and this is my only role. ○ Non Cardholder/Card Applicant I administer card program on behalf of my company or organization OR I have applied for a card and yet to receive it. * Username * Account number (Last 6 digits) * Enter the code in the image ☐ Select Audio Challenge Code: **56222** ↻ REFRESH Continue Cancel Clear Login screen on the CitiManager website	3. Select the Cardholder option. 4. Enter your username in the *Username* box. 5. Enter last 6 digits of your card number in the *Account number (Last 6 digits)* box. 6. Click on Continue. *The Security Question screen will open.*

Citi® Commercial Cards
 	
citi
 	
Pytanie pomocnicze
 	
ⓘ Odpowiedz na pytanie weryfikacyjne, aby kontynuować.
 	
What is your favorite car?
 	
Dalej   Anuluj
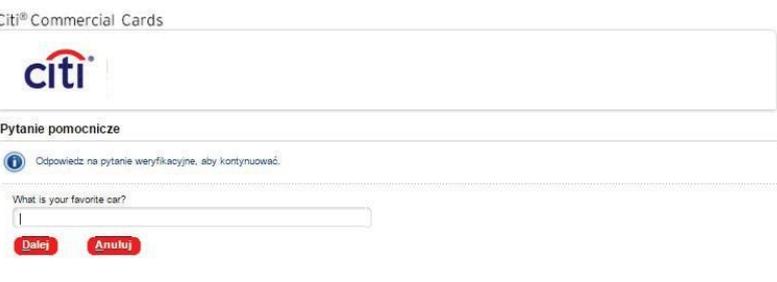 	
Security Question screen
	7. In the box below the security question, type your answer and click on Continue.
	
	   NOTE. You have three attempts to give the correct answer to the security question.
	
	   The Create New Password screen will appear.

Citi® Commercial Cards
 	
citi
 	
ⓘ Change your current password. The fields marked with asterisk (*) are mandatory to proceed.
 	
* Current password
 	
* New password
 	
* Confirm password
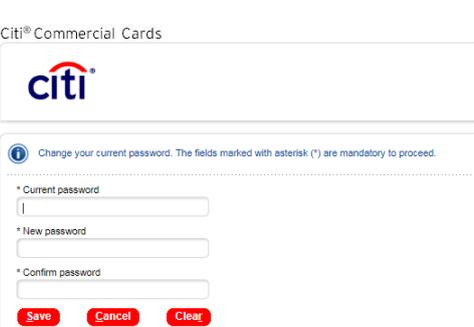 	
Save   Cancel   Clear
	8. Create and confirm your new password.
	
	   NOTE. Password is case-sensitive. A password must be between 6 to 9 characters, with at least 1 letter and 1 number, and must not be the same as one of your last 6 passwords.
	
	9. Click on Save.
	
	   Your new password has been saved. CitiManager Home Screen will appear.

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Retrieve a forgotten username

Key Information

If you have forgotten your CitiManager login username, you will need to retrieve it. The username will be sent to your registered email address. To retrieve your Username, the following information is required:

- Cardholder's full name (as shown on the card),
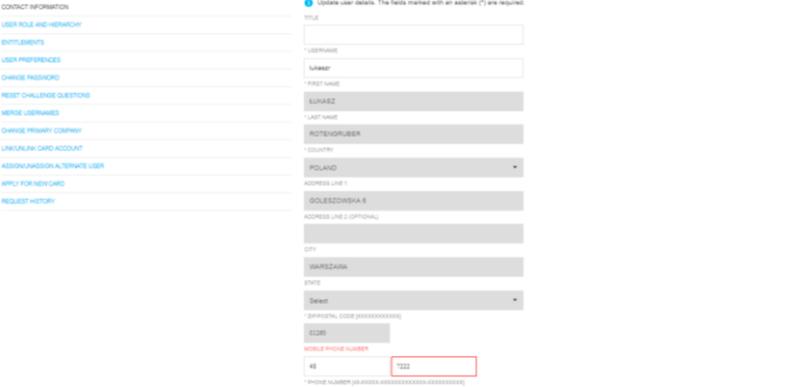- full card number.

Step-by-Step Instructions

Screen	Step/Action
	1. Go to home.cards.citidirect.com. On the CitiManager Login page, click on *Forgot username?* link. *The Forgot sign on - username screen displays.*
	2. Select the Cardholder option. 3. Enter Cardholder's full name (as shown on the card) in the *Embossed Name* box. 4. Enter the full card number in the *Account Number (Full number)* box. 5. Click on Continue. *The Security Question screen will open.*

Screen	Step/Action
Security Question screen	6. In the box below the security question, type your answer and click on Continue. NOTE. You have three attempts to give the correct answer to the security question. The system will send a message with the correct Username to your registered email address.

Change your profile settings

Key Information
Using CitiManager, you can update your log-in profile data, such as login, telephone numbers, e-mail address, password, and security question. To change the data, you'll need to do the following:
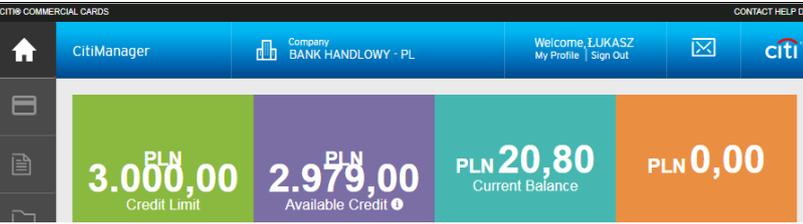
Screen	Step/Action
Home Screen	1. On the CitiManager homepage, click the My Profile tab.
	2. You can update your login, phone number and email address.

3. To change your log-in password and the security questions, go to My Profile tab, and then go to *Change password* or *Set security questions again* respectively.

4. Changing your password. Enter your old password, and then enter a new log-in password twice. Confirm the change by clicking Save.

5. Changing your security questions. To verify yourself, answer the first security question. At next log-in, you'll be asked to choose new questions and specify new answers.

View statements

Key Information

A statement contains the following information:

- card data,

- account balance,

- transaction details.

The last statement is shown, but you can view statements from previous 60 months.

Step-by-Step Instructions

Screen	Step/Action
 Home Screen	1. On the CitiManager homepage, click on the Statements icon or the Statements tab. *The Statements screen will show statements history.*
	2. To view previous statements, select a date from the side panel, or select a statement from the list on the page. *A statement from the selected day will appear.*
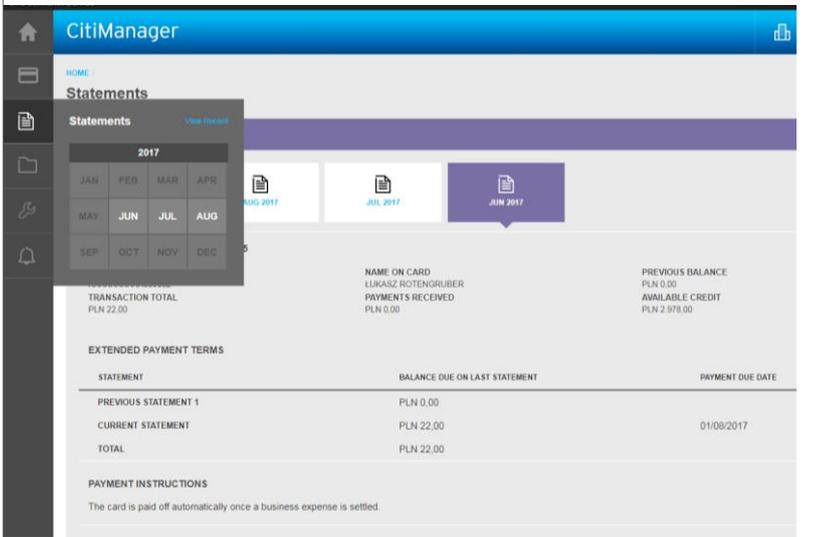
Print statements

Key Information
On the Statements screen you can print statements. A statement is printed in Adobe PDF (Portable Document Format).

Step-by-Step Instructions

Screen	Step/Action
Home Screen	1. On the CitiManager homepage, click on Statements tab or icon. *The Statements screen will show the last statement.*
	2. Select the current statement or one of the previous ones shown and then click Download. You can choose either CSV, PDF or TXT. *File format prompt will appear.*

Screen	Step/Action
Printout confirmation	3. Note that the downloaded file can be stored in your computer's cache. Click OK. *File download prompt will appear.* 4. To open a statement to print, click the Open button. *The statement to be printed is displayed in PDF format.* NOTE. Depending on your computer settings, you may need to disable po-pup blockers in order to view the statement.
Statement in PDF.	5. Click on Print in the PDF screen. Select a printer and choose print settings. Click on Print in the PDF screen. *The print window appears.* 6. When you're done, click the OK button. *The statement will be printed on the printer that you have specified.*

Review outstanding transactions

Key Information

Citimanager allows you to view outstanding transactions when they appear in your account. Outstanding transactions are transactions that have appeared in your account since your last statement. You can view outstanding transactions before a statement is generated. Outstanding transactions will appear on your next statement and are not included in the current statement.

Step-by-Step Instructions

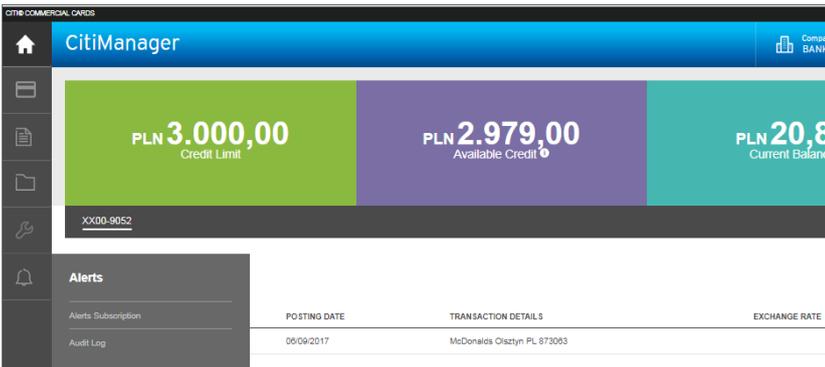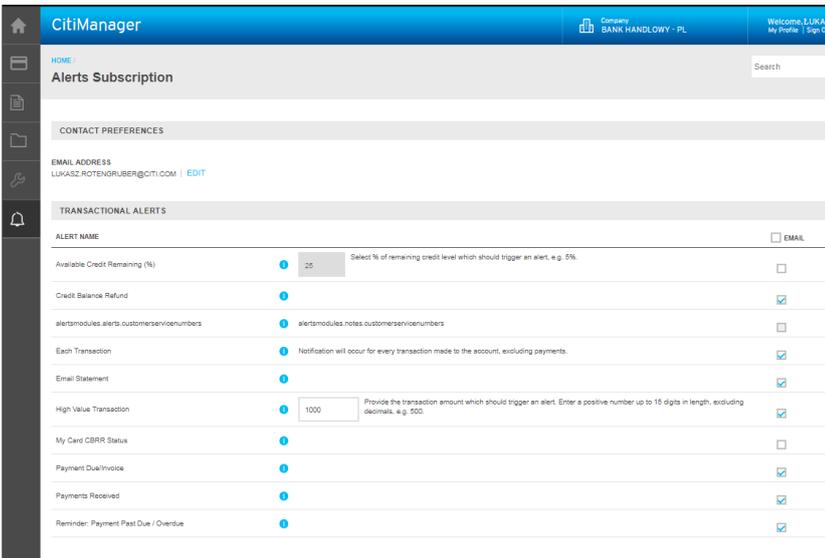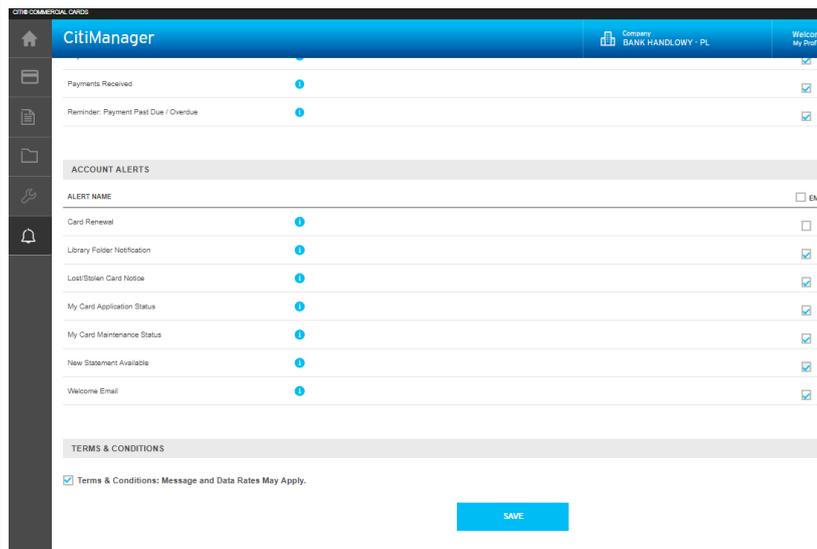| Screen	Step/Action
	1. You will find a list of ongoing operations on the CitiManager homepage below the balance. You can view the information about the transactions from the current cycle by clicking on the Statements tab or icon. *A list of statements will appear on the screen.*
	2. Click the Recent icon. *You will see the Current Cycle Transactions screen.* 3. At the bottom of the screen, you will find a list of Recent operations.
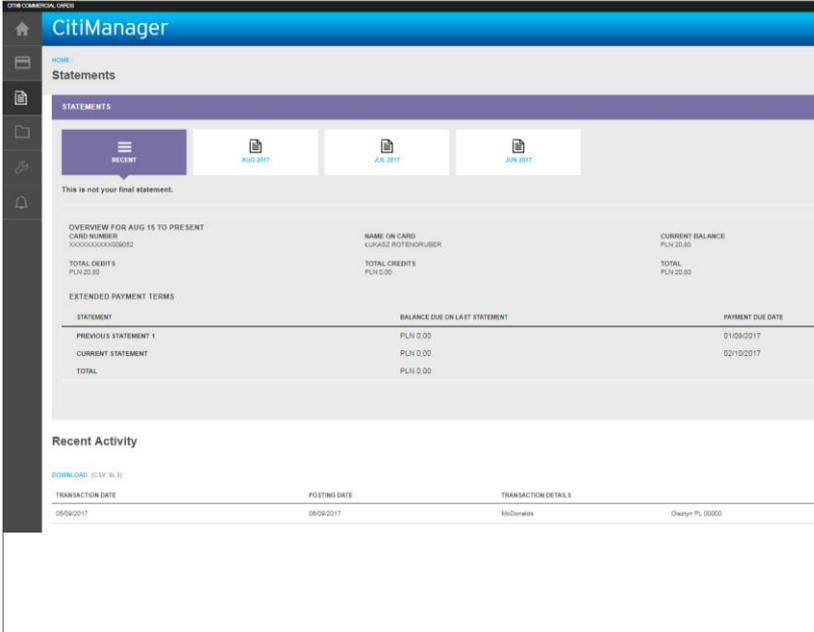
Set notifications

Key Information
A Cardholder can set notifications that will be sent automatically as emails when there is a specified activity in your account, such as a notification on having generated a statement or reaching a specific credit limit percentage.

You can receive notifications in the form of emails.

Step-by-Step Instructions

Screen	Step/Action
 Home Screen	1. On the CitiManager homepage, click the Alerts icon or tab. *Notification Subscription screen appears.*
	2. From the list of available transaction notifications, select the ones you want to receive in as email.

Screen	Step/Action

Screen side:

CITI® COMMERCIAL CARDS

CitiManager

Company
BANK HANDLOWY · PL

Welcome
My Profile

Payments Received

Reminder: Payment Past Due / Overdue

ACCOUNT ALERTS

ALERT NAME		EMA
Card Renewal		☐
Library Folder Notification		☑
Lost/Stolen Card Notice		☑
My Card Application Status		☑
My Card Maintenance Status		☑
New Statement Available		☑
Welcome Email		☑

TERMS & CONDITIONS

☑ Terms & Conditions: Message and Data Rates May Apply.

SAVE

Step/Action side:

3. Select also the selected notifications as emails for Account – card and statement status.

   NOTE. Some notifications may be unavailable (grayed out). What notifications are available is determined by the Program Administrator.

4. To edit the e-mail address, click the *Contact preferences - edit* link.
.

   User profile e-mail addresses screen appears.

5. You can enter up to 5 email addresses. Then, click on Save.

   Notification Settings screen will appear again.

6. Confirm that you accept Terms and Conditions by checking the box and then click on Save.

   Confirmation will be displayed at the top of the screen.

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