

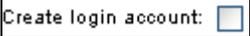
Job Aid

Manage Point of Contact Information via CitiDirect Card
Management System (CCMS)/
Registering an APC/AO User via Landing Page

Manage Point of Contact Information via CCMS

Purpose: When creating a new Point of Contact that will require CCMS access, users need to login to the Landing Page, go to Applications and select the CCMS link. Once in CCMS the steps below will walk you through the new user creation process.

Manage Point of Contact Information via CCMS

| | |
|-----|--|
| 1. | Point to the Hierarchy link. |
| 2. | Click the View link.  |
| 3. | Select your appropriate Hierarchy |
| 4. | Click the manage contacts button.  |
| 5. | When you click on the manage contacts button a list of all users with current access to the hierarchy you selected will display. |
| 6. | Click the add new contact button.  |
| 7. | The Add New Contact window displays the profile information for the new point of contact. Enter the complete contact information in the appropriate fields. (* An asterisk indicates a required field) |
| 8. | Click on the User Group dropdown selector.  |
| 9. | Click on the desired User Group from the dropdown list.  |
| 10. | Click on the Contact Type dropdown selector.  |
| 11. | Click on Alternate APC from the dropdown list.  |
| 12. | To authorize access to CitiDirect Card Management System (CCMS) and CitiBank Custom Reporting System (CCRS) for the point of contact, click in the Create login account checkbox. |
| 13. | Click the Create login account option.  |
| 14. | Click the ok button.  |

| | |
|-----|--|
| 15. | Click the confirm button.  |
| 16. | To EDIT a point of contact click on the edit link in the action section. |
| 17. | Click the edit link.  |
| 18. | Edit the desired information. |
| 19. | To update your edits, click the ok button.  |
| 20. | To DELETE a point of contact click on the delete link in action section. This will delete their access to CCMS. |
| 21. | Click the delete link.  |
| 22. | Click the confirm delete button.  |
| 23. | Click the close button.  |

Registering an APC/AO User via the Landing Page

Registering an APC/AO User via the Landing Page

| | |
|----|--|
| 1. | <p>Once a Point of Contact has been submitted via the CCMS system, the contact will receive two e-mails from Citi. One will contain the Landing Page URL and Registration ID. The second e-mail will contain the Registration Passcode. The user has approximately 60 days from the issuance of the Registration ID to log in to the Landing Page and Click on the Self registration for non card holders link at the bottom right of the home page under First Time Users.</p>  |
| 2. | <p>The user is now prompted to enter their Registration ID and Registration Passcode provided in the e-mail correspondence.</p> |
| 3. | <p>Click the Continue button.</p>  |
| 4. | <p>You will now create your Username.</p> <p><u>Username Rules:</u></p> <ul style="list-style-type: none"> • At least 7 characters, no more than 16 characters. • Cannot include any special characters. • Is not case-sensitive • The Username must be unique in the system. If you enter a username that has already been created, the system will prompt you to create a different Username. |
| 5. | <p>You will now create your Password.</p> <p><u>Password Rules:</u></p> <ul style="list-style-type: none"> • Length of password must be at least 6 characters, no more than 9. • Password must include at least 1 letter. • Password must include at least 1 number. • Passwords are case-sensitive. • No consecutive characters (i.e. tt, dd). • Special characters and spaces are acceptable. |
| 6. | <p>The Secret Question will be used by the Citi Technical Helpdesk to validate your identification when you call.</p> <p>You will now Select a Secret Question.</p> <p>Click the * Secret question list and select from the Drop-down list.</p>  |
| 7. | <p>Please provide the answer to your Secret Question.</p> |

| | |
|-----|---|
| 8. | Click the Continue button.  |
| 9. | The user will now be able to view a screen confirming the user's Self Registration to access the Landing Page. |
| 10. | Click the Confirm button.  |
| 11. | Click the OK button.  |
| 12. | User will now be logged out of the Self Registration and be prompted to log back in using the Username and Password they set up when registering. |
| 13. | User will now be prompted to select three (3) of the five (5) Challenge Questions and enter the answers for each question selected. Note: All answers must be four (4) letters or more. |
| 14. | Click the Save button.  |
| 15. | The Landing Page will now appear. User can select any one of the function buttons to navigate the Landing Page system. When navigating the Landing Page, the user can return to the main screen by click on the Home/Landing Page link on the bottom left side of the screen. The system times out after 30 minutes of inactivity. |
| 16. | The registered user will now be able to view the Applications link which will include the newly created CCMS and CCRS links. |