

# CitiManager

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## Registering for CitiManager, Enrolling in Paper-Free Statements, and Viewing Your Electronic Statement

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# 1. Self Registration in CitiManager (Cardholders)

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# Self Registration for Cardholders

Access the CitiManager portal directly at <https://home.cards.citidirect.com>

## Step 1

Prior to accessing the Self-Registration link, it is important to have the following information available:

1. Full 16-digit account number
2. Account Name
3. Account Address – for non-U.S. addresses, please use Postal Code 00000



**Registered users**

Username

Password

[Forgot username?](#)

[Forgot password?](#)

**First time users**

[Self registration for Cardholders](#)

[Self registration for Non Cardholders](#)

[Apply for card](#)

You are authorized to use this System for approved business purposes only. Use for any other purpose is prohibited. All transactional records, reports, e-mail, software, and other data generated by or residing upon this System are the property of the company and may be used by the company for any purpose. Authorized and unauthorized activities may be monitored.

# Self Registration for Cardholders (con't.)

## Self registration for Cardholders



Please select the proper registration process for your organization.

Registration ID/Passcode

I have my registration details and I would like to register my card.

Fill the card's data

I have not received registration details and I would like to register card.

Continue

Cancel

**IMPORTANT NOTE:** DoD cardholders should select the *"Fill the cards data"* option

# Enter Card and Contact Details

**IMPORTANT NOTE:** If the account information is entered incorrectly or if the account is already registered, you will receive an error message:  
“The card details provided do not exist or the card has already been registered. Please verify the details provided or contact Customer Service.”

## Self registration for Cardholders

 Enter details for self registration. The fields marked with asterisk (\*) are mandatory to proceed.

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**Card Details** **Step 1**

\* Card number  \* Account name

Enter the account number from your card with no spaces or dashes. Enter the name that appears on your card. Please note that this must be entered exactly as it appears on your card.

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**Contact details** **Step 2**

\* Address line 1  Address line 2  \* Town / City

\* Country  \* State/Province/Region  \* Zip/Postal code

Enter your billing address for your card.

**Continue** **Cancel** **Clear**

**Step 1**  
Enter the **Card Details** exactly as they appear on your card

**Step 2**  
In the **Contact Details** section, enter your billing information then click the Continue button

# Enter Username

Sign on details

Step 1

 Enter details for sign on. The fields marked with asterisk (\*) are mandatory to proceed.

\* Username

\* Password

\* Confirm password

\* Helpdesk verification question

\* Helpdesk verification answer

Continue

Cancel

Clear

Username is not case sensitive and:

- Must be more than six characters.
- May contain letters, numbers and special characters.
- Cannot contain space(s)
- Must not contain only numbers.

## Step 1

On the **Sign on Details** screen, enter a Username of your choice and unique password

*Username Guidelines:* Unique, more than six characters, may contain letters, numbers and special characters, not case sensitive, not all numbers, no spaces

*Password Guidelines:* Six to nine characters, case sensitive, must include at least one lowercase letter and one number

## Step 2

Select **Confirm**

## IMPORTANT NOTE

When creating a Username and Password, CitiManager will change the red  to green  as they meet the conditions

Sign on details

 Enter details for sign on. The fields marked with asterisk (\*) are mandatory to proceed.

\* Username

\* Password

\* Confirm password

\* Helpdesk verification question

\* Helpdesk verification answer

Continue

Cancel

Clear

Username is not case sensitive and:

- Must be more than six characters.
- May contain letters, numbers and special characters.
- Cannot contain space(s)
- Must not contain only numbers.

Step 2

# Helpdesk Verification Question & Answer

## Sign on details **Step 1**

 Enter details for sign on. The fields marked with asterisk (\*) are mandatory to proceed.

\* Username

TestRegistration02

\* Password

.....

\* Confirm password

.....|

\* Helpdesk verification question

Name of your First Pet? ▾

\* Helpdesk verification answer

Dog

**Continue**

**Cancel**

**Clear**

**Step 2**

### Step 1

Select a **Helpdesk verification** question from the drop-down menu. Type the answer to the question in the **Helpdesk verification answer** field

### Step 2

Select **Continue**

# Recap and Confirmation

## Recap

→ Confirm the details that you entered.

Username

TestReg02

Card number

XXXXXXXXXX651192

Account name

James Park

### Contact details

Address line 1

1724 W Whitton Ave

Country

UNITED STATES OF AMERICA

Address line 2

State/Province/Region

AZ

Town / City

Phoenix

Zip/Postal code

85015

Confirm

Cancel

Step 1

### Step 1

Review the information for accuracy and click the **Confirm** button

### Step 2

A Confirmation of self-registration will appear. Select **OK**

## Confirmation message



Confirmation of self-registration

The account with username 'TestReg02' has been signed up successfully.

OK

Step 2

# Challenge Questions



Select challenge questions and set answers.

Challenge Question 1

Step 1

What is the name of your favorite movie?

Answer 1

Challenge Question 2

What is the name of your favorite movie?

Answer 2

Challenge Question 3

What is the name of your favorite movie?

Answer 3

Save

Cancel

Clear

Step 2

## IMPORTANT NOTE

Upon first login, you will be prompted to set your **Challenge Questions and Answers**

### Step 1

You are required to select and answer three challenge questions. Neither the questions nor the answers may be the same

Answers must have a minimum of three characters

### Step 2

Click on the **Save** button to finish the registration process and be navigated to the CitiManager Home screen

# The CitiManager Home Screen

Citi® Commercial Cards



Welcome! [Redacted] 08/05/2013 For assistance please contact Citi Customer Services [Logout](#)

DEPARTMENT OF DEFENSE - US

[Home](#) | [My Card Account](#) | [Statement](#) | [Payment](#) | [My Profile](#) | [Resources](#)

Select a Card : [Redacted]

 This is your Citi Commercial Cards home page where you can view your account statements and payment details.

**Message Center** New message(s):0, Total message(s):3

- Rajeshwar\_08APR2013-TEST\_2 [More](#)
- Rajeshwar\_08APR2013-TEST\_1 [More](#)
- PerfTesting [More](#)

**Quick Links**

- [Manage Alerts](#)
- [Update User Profile](#)
- [Link another card account](#)

 **Current Account Summary**

<b>Current balance:</b>	\$ 2.00 CR	<b>Available credit:</b>	\$ 5,875.00
<b>Credit limit:</b>	\$ 6,000.00	<b>Pending authorizations:</b>	\$ 125.00
<b>Next payment due:</b>	\$ 0.00 (Not Available) » <a href="#">Make payment</a>	<b>Last payment received:</b>	\$ 0.00 (Not Available) » <a href="#">View Payment History</a>

## 2. Enrolling in Paper-Free Statements

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# Paper-Free Enrollment

Enrolling in Paper-Free statements is quick and easy.

Citi® Commercial Cards



Welcome! [REDACTED] 08/05/2013 For assistance please contact Citi Customer Services [Logout](#)

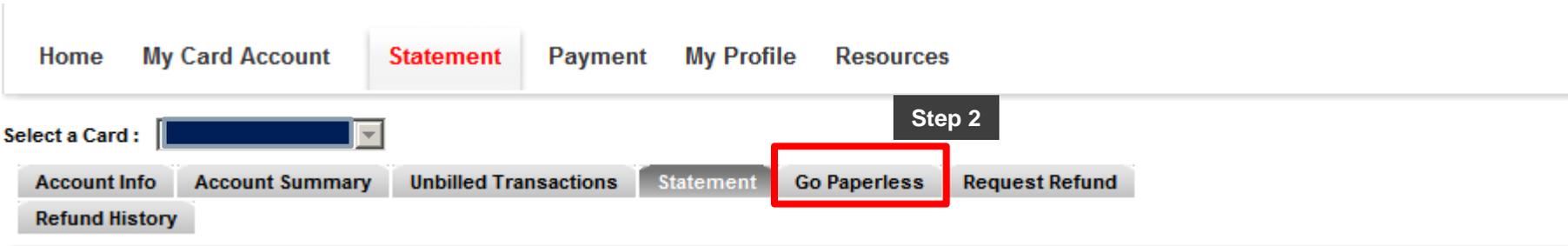
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**Step 1**

Home My Card Account **Statement** Payment My Profile Resources

**Step 1**  
To select paper-free statements, click on the **Statement** tab

**Step 2**  
Next, click the **Go Paperless** sub-tab



Home My Card Account **Statement** Payment My Profile Resources

Select a Card : [REDACTED]

**Step 2**

Account Info Account Summary Unbilled Transactions **Statement** **Go Paperless** Request Refund

Refund History

# Paper-Free Enrollment (con't.)

Registering for Paper-Free statements is quick and easy.

Account Info

Account Summary

Unbilled Transactions

Statement

Go Paperless

Request Refund

Refund History

 Select your delivery preference for statements and other notices regarding your Citi card account.

## Step 1

Enter a checkmark to STOP receiving paper statements and other notices regarding your Citi card account or uncheck to receive your statements and other notices

### Terms and Conditions

You currently receive a billing statement ("statement") in the mail when your Citi card account identified above has had activity and you also receive other notices (including legal notices) relating to your card account identified above ("notices") in the mail, such as notices of an amendment to your cardholder agreement. Signing up for the Paperless Initiative means that we will stop mailing you paper copies of those statements. It also means that we will stop mailing you paper copies of those notices to the extent we make them available electronically now or in the future. Instead, we will make those statements and notices available to you on the CitiManager web site. We will send an email reminder each time your statement is ready for viewing. We will also send you an email reminder any time we have a notice ready for you to review.

#### Once you're enrolled

You will receive an email when your statement is ready, and receive an email any time a notice is ready for your review.

### Step 1

Check the box after you have read the **Terms and Conditions**, scroll, down, and click the **I Agree** button

# Paper-Free Enrollment (con't.)

**Alerts Email**

Email address(es) on file  
example@example.com

Please confirm if the email address(es) are correct.

**Yes** **No** **Step 1**

**Step 1**  
Confirm the email address where your paper free statements will be sent

**Alerts Email**

Please go to alert details screen located under My Profile - Alerts - Manage Email Address to update your email address.

**Ok** **Step 2**

**Step 2**  
If the email is correct, click the **Yes** button  
If the email is incorrect, click the **No** button to be redirected to update your email address

**Online Payment Options**

Setup your online payment options **Step 3**

**Continue to Make Payment>>** **Cancel**

**Step 3**  
You can also elect to set up online payments  
Click the **Continue to Make Payment** button to do so or click the **Cancel** button

## 3. Viewing Your Electronic Statement

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# Viewing your Statement

Navigate to the Statement screen for viewing current or past statements.

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Home My Card Account **Statement** Payment My Profile Resources

Select a Card:

Account Info Account Summary Unbilled Transactions **Statement** Go Paperless Request Refund Refund History

**View, print and download your account statement. Please click on the icon displayed next to the transaction to get more details.**

**Card Details**

Card number XXXXXXXXXXXXXXXXXX	Card name ROBERT	Previous balance \$ 0.00	Balance due \$ 0.00	New transactions \$ 0.00
Payments received \$ 0.00	Payment Due Date			

Statement date:  Statement start date: 06/24/2013 Statement ending date: 07/23/2013

[Make Payment](#) [View additional statement information](#) \* NEW [Print](#) [Download](#)

No.	Transaction date	Posting Date	Reference	Transaction detail	Transaction Amount	Transaction Currency	Exchange Rate	Card/Posting amount
1			24692163108	UNITED 800-932-2732 TX		USD		
2			24717053108	CWTSATOTRAV 8902554273142		USD		
3			24445003109	USAF/IAMC PASSNGER FEES-BA		USD		

[Back](#) [View additional statement information](#) [Print](#) [Download](#)

## IMPORTANT NOTE

Selection of the **Print** button will display a PDF version of your statement for printing

Selection of the **Download** button will offer download options (Excel, CSV, or PDF)

# Viewing your Unbilled Transactions

Navigate to the Unbilled Transactions screen to view any new transactions since your last statement.

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Home My Card Account **Statement** Payment My Profile Resources

Select a Card:

Account Info Account Summary **Unbilled Transactions** Statement Go Paperless Request Refund Refund History

**!** There has been no activity on your account this month.

**This is not your final statement.**

Overview Of Card Accounts

Card number	Card name	Amount	Available credit limit	Current balance
XXXXXXXXXXXXXXXXXX	ROBERT	\$ 0.00	\$ 4,000.00	\$ 0.00

[View Authorizations](#) [Print](#) [Download](#)

No.	Transaction date	Posting Date	Reference	Transaction detail	Transaction Amount	Transaction Currency	Exchange Rate	Card/Posting amount	Debit/Credit
There has been no activity on your account this month.									

[View Authorizations](#) [Print](#) [Download](#)

## IMPORTANT NOTE

Selection of the **Print** button will display a PDF version of your statement for printing

Selection of the **Download** button will offer download options (Excel, CSV, or PDF)

# Viewing your Account Summary

Navigate to the Account Summary page to see an overview of your account.

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Home My Card Account **Statement** Payment My Profile Resources

Select a Card : **Account Summary** Unbilled Transactions Statement Go Paperless Request Refund

View summary of the selected account.

[View Current Statement](#)

**Overview Of Card Accounts**

Card name	ROBERT	Card number	XXXXXXXXXXXXXXXXXX	Hierarchy		Employee ID	Not Available
Account status	Open	Line of credit	\$ 6,000.00				
Default accounting code	Not Available						

**Last Statement of Cycle**

Statement date	07/23/2013				
Previous balance	\$ 0.00				
Payments	\$ 0.00				
Credits	\$ 0.00				
New charges	\$ 0.00				
New balance	\$ 0.00				
Payment due date	08/17/2013				

**Unbilled Transaction**

Next Statement Date	08/23/2013
Balance as of 08/02/2013	\$ 0.00
Total debits posted as of 08/02/2013	\$ 0.00
Total credits posted as of 08/02/2013	\$ 0.00
Total payments posted as of 08/02/2013	\$ 0.00
Pending authorizations	\$ 0.00
Current balance	\$ 0.00
Available credit	\$ 6,000.00
Payment Due Date	09/17/2013

**Aging of Balance**

Past Days	1-30	31-60	61-90	91-120	>121+
Balance past due					
Amount	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Unbilled transactions reports any account activity since your last statement. This is posted on a daily basis.  
The last activity for your account was posted on 06/07/2013.

[View Current Statement](#)

The **Account Summary** page provides a review of your credit line, last statement balance, total pending authorizations, available credit and much more

## 4. Useful Links and Tools

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# Useful Links and Tools

Everything you need, right at your fingertips

## CitiManager Home page:

<https://home.cards.citidirect.com>

CitiManager's **Resources** tab houses useful information and guides that may assist you:

Citi® Commercial Cards

Welcome! 08/06/2013 For assistance please contact Citi Customer Services Logout

DEPARTMENT OF DEFENSE - US

Home My Card Account Statement Payment My Profile **Resources**

Message Board Library Search Links/Help View FAQ

**i** Links/help and their mapping. The links shown are external to Citibank. Citibank does not control and is not responsible for the contents of external sites.

No.	Link name	Description
1	<a href="#">CitiManager Library User Guide</a>	CitiManager Library User Guide
2	<a href="#">CAFE User Guide</a>	CAFE User Guide
3	<a href="#">CLASS Quick Reference Guide</a>	CLASS Quick Reference Guide
4	<a href="#">CitiManager Cardholder User Guide</a>	CitiManager Cardholder User Guide
5	<a href="#">CitiManager Non-Cardholder User Guide</a>	CitiManager Non-Cardholder User Guide
6	<a href="#">CitiManager Set Email and SMS Mobile Messaging Job Aid</a>	CitiManager Set Email and SMS Mobile Messaging Job
7	<a href="#">GSA Smartpay® 2 Program Website</a>	GSA Smartpay® 2 Program Website
8	<a href="#">Global Card Management</a>	Global Card Management
9	<a href="#">Payment Remittance Address Change</a>	Payment Remittance Address Change
10	<a href="#">What's New</a>	What's New

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Citi works with its clients in greenhouse gas intensive industries to evaluate emerging risks from climate change and, where appropriate, to mitigate those risks.

efficiency, renewable energy & mitigation

