Card Activation, CitiManager Registration and Website Navigation

Revised Sept. 3, 2020

Introduction to Citibank Tools

CitiManager

Citibank puts all card activity online for secure 24/7 access. You can download statements, view unbilled transactions, view pending authorizations and declined transactions.

E-Mail and Text Alerts

E-mail and Short Message Service (SMS) alerts notify you of critical account activity such as when the statement is ready, payment is due, a transaction was declined, or suspected fraud.

Chip & Pin Technology

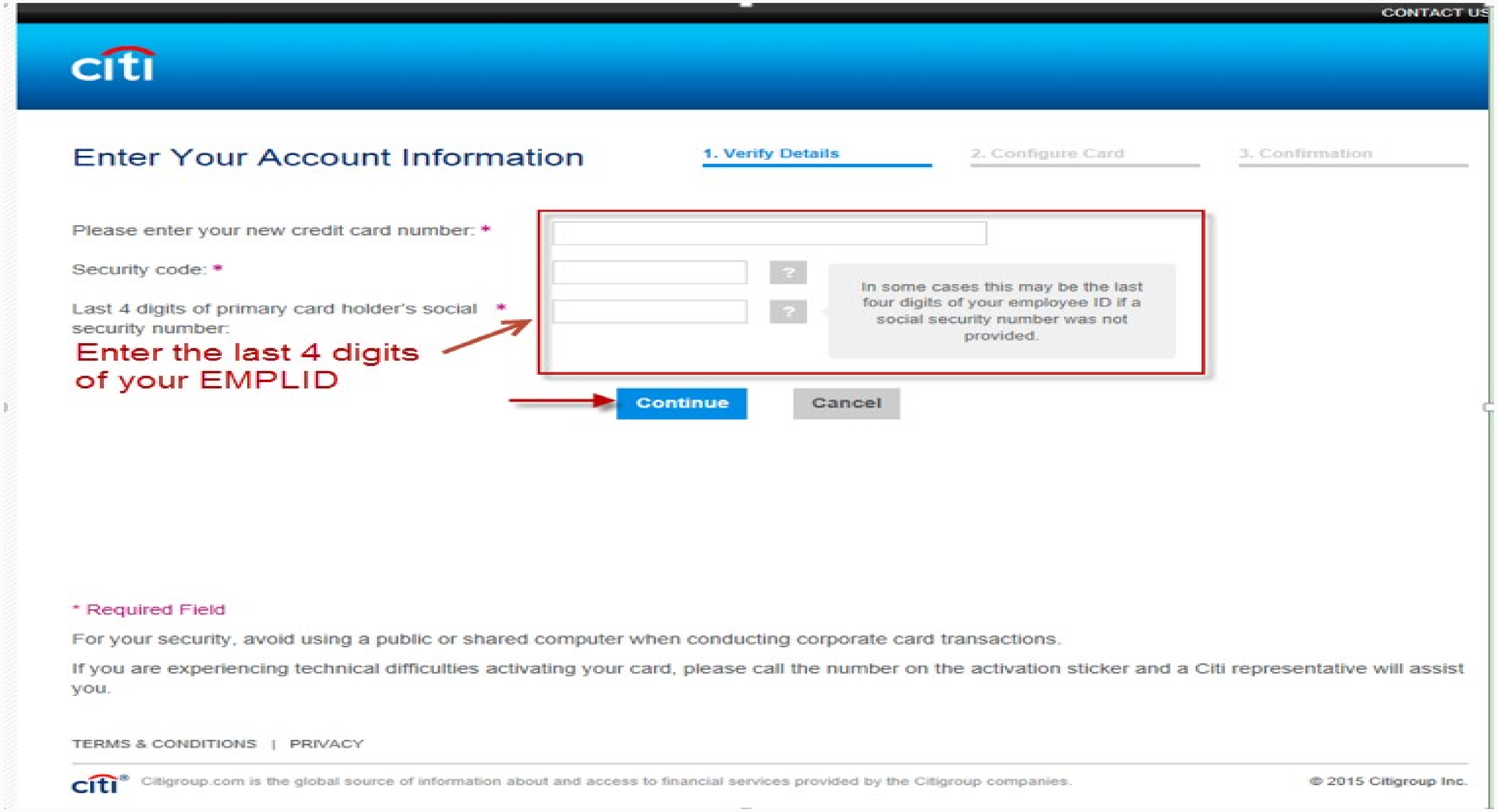
Chip and PIN cards feature an embedded microprocessor that improves security when you make purchases at Chip-activated terminals. Every time you use your card at a Chip-activated terminal, the embedded Chip generates a unique, one-time use code for each transaction. This makes it extremely difficult for the card to be copied or counterfeited.

Activating Your New Card

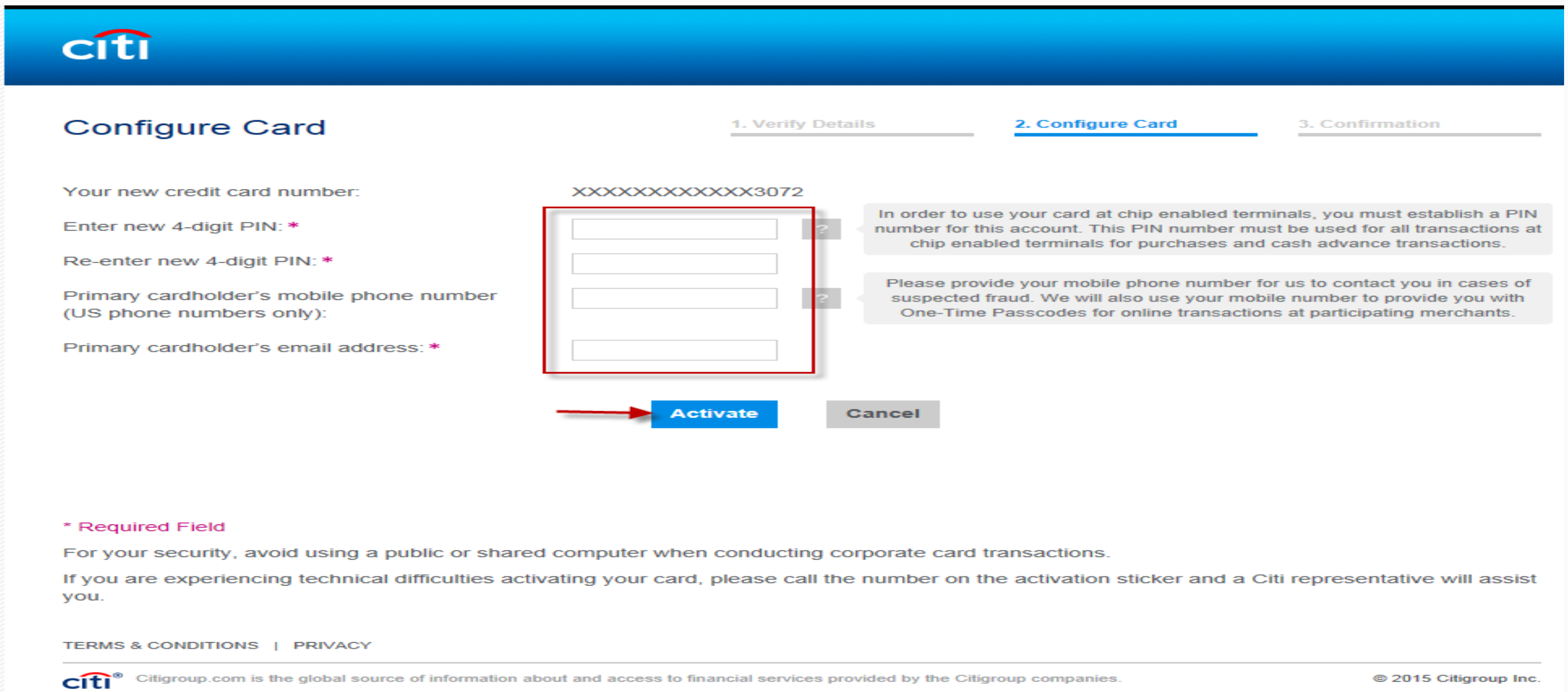
Activation Website

Enter the URL listed on the removal label on the front of the card. You will be directed to a secure Citibank webpage (HTTPS).

Verify Card Details



Configure Card


citi

Configure Card

1. Verify Details | 2. Configure Card | 3. Confirmation

Your new credit card number: XXXXXXXXXXXX3072

Enter new 4-digit PIN: *

Re-enter new 4-digit PIN: *

Primary cardholder's mobile phone number (US phone numbers only):

Primary cardholder's email address: *

In order to use your card at chip enabled terminals, you must establish a PIN number for this account. This PIN number must be used for all transactions at chip enabled terminals for purchases and cash advance transactions.

Please provide your mobile phone number for us to contact you in cases of suspected fraud. We will also use your mobile number to provide you with One-Time Passcodes for online transactions at participating merchants.

Activate | Cancel

* Required Field

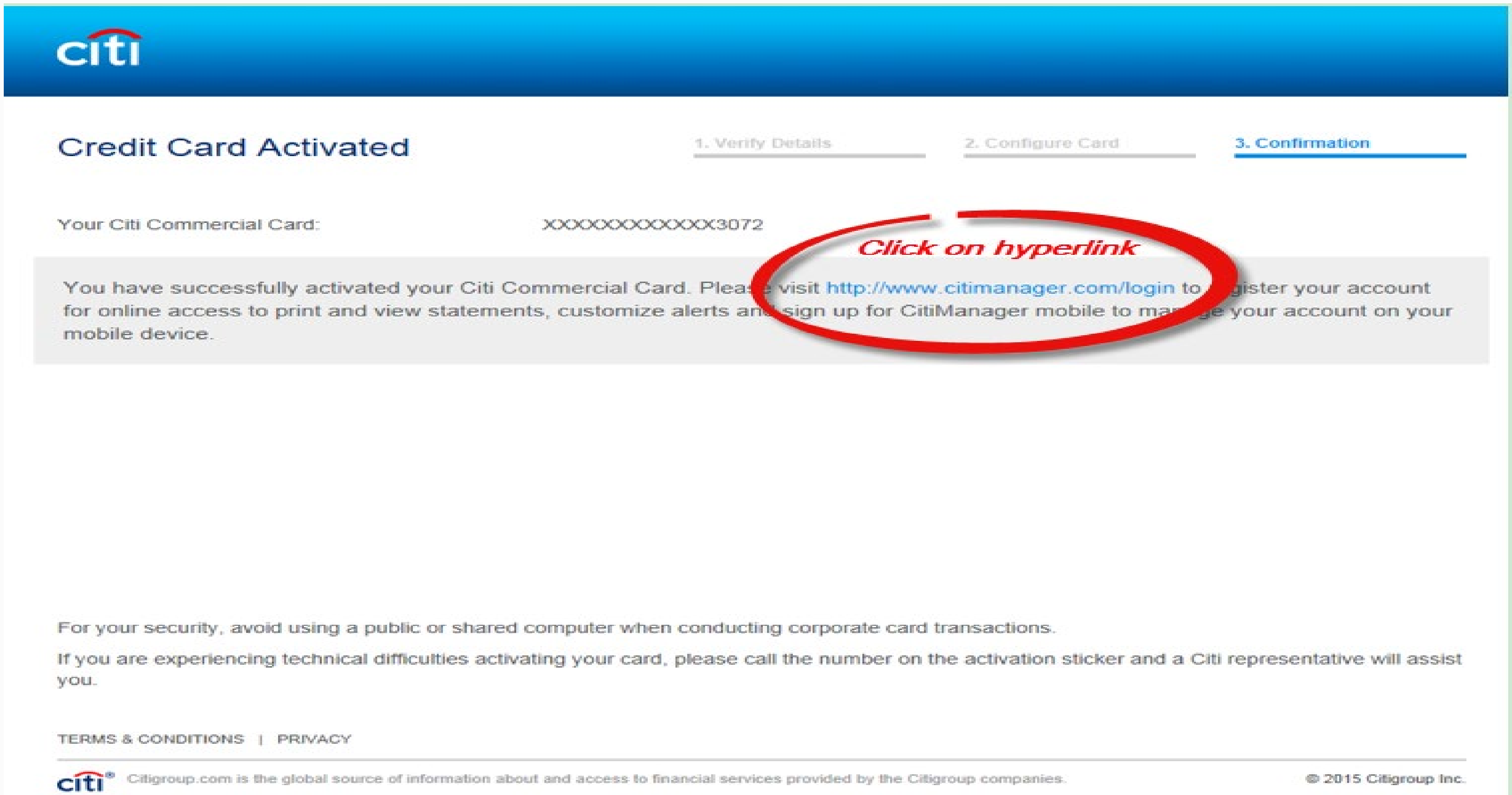
For your security, avoid using a public or shared computer when conducting corporate card transactions.

If you are experiencing technical difficulties activating your card, please call the number on the activation sticker and a Citi representative will assist you.

TERMS & CONDITIONS | PRIVACY

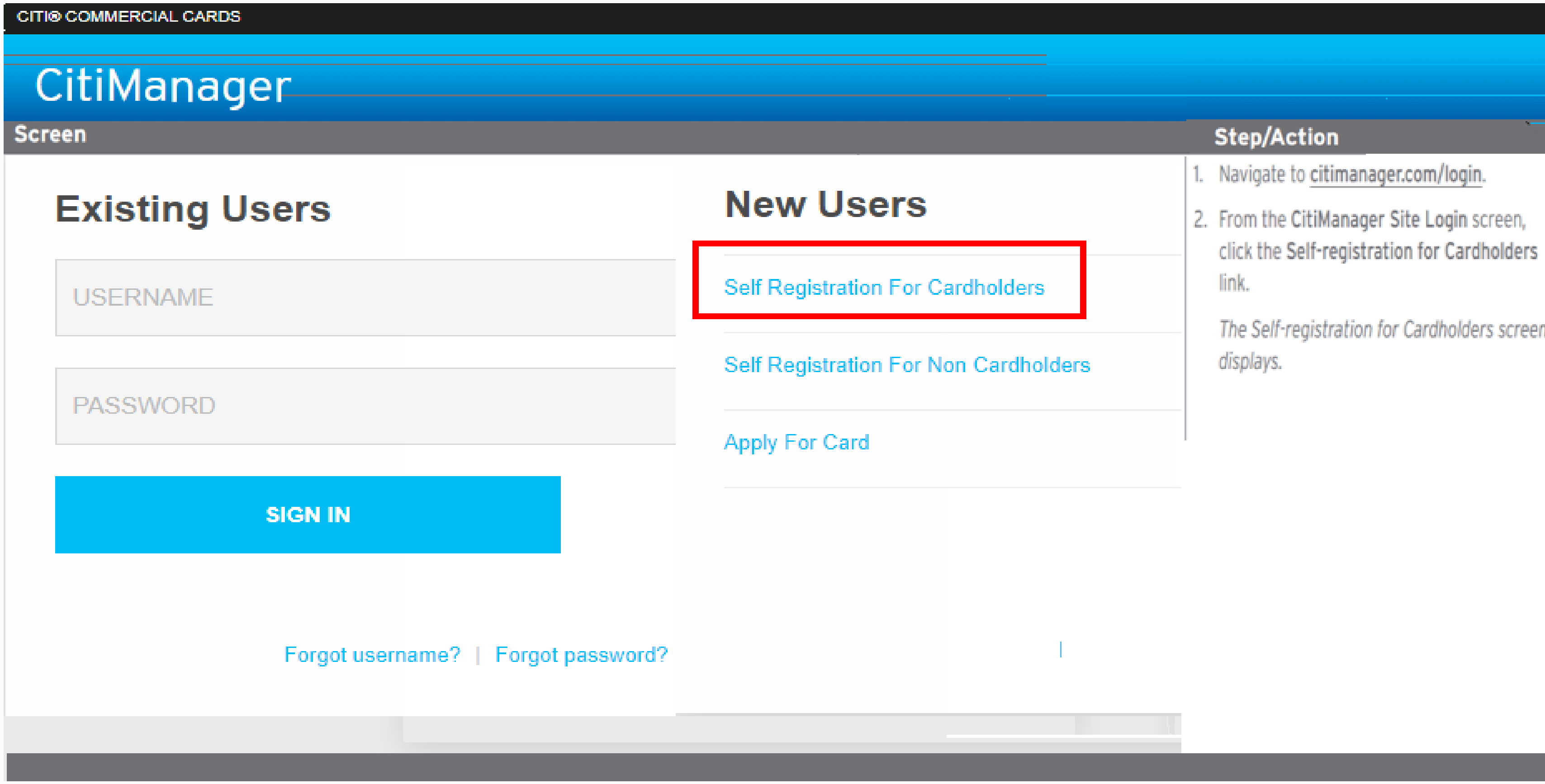
citi® Citigroup.com is the global source of information about and access to financial services provided by the Citigroup companies. © 2015 Citigroup Inc.

Confirmation

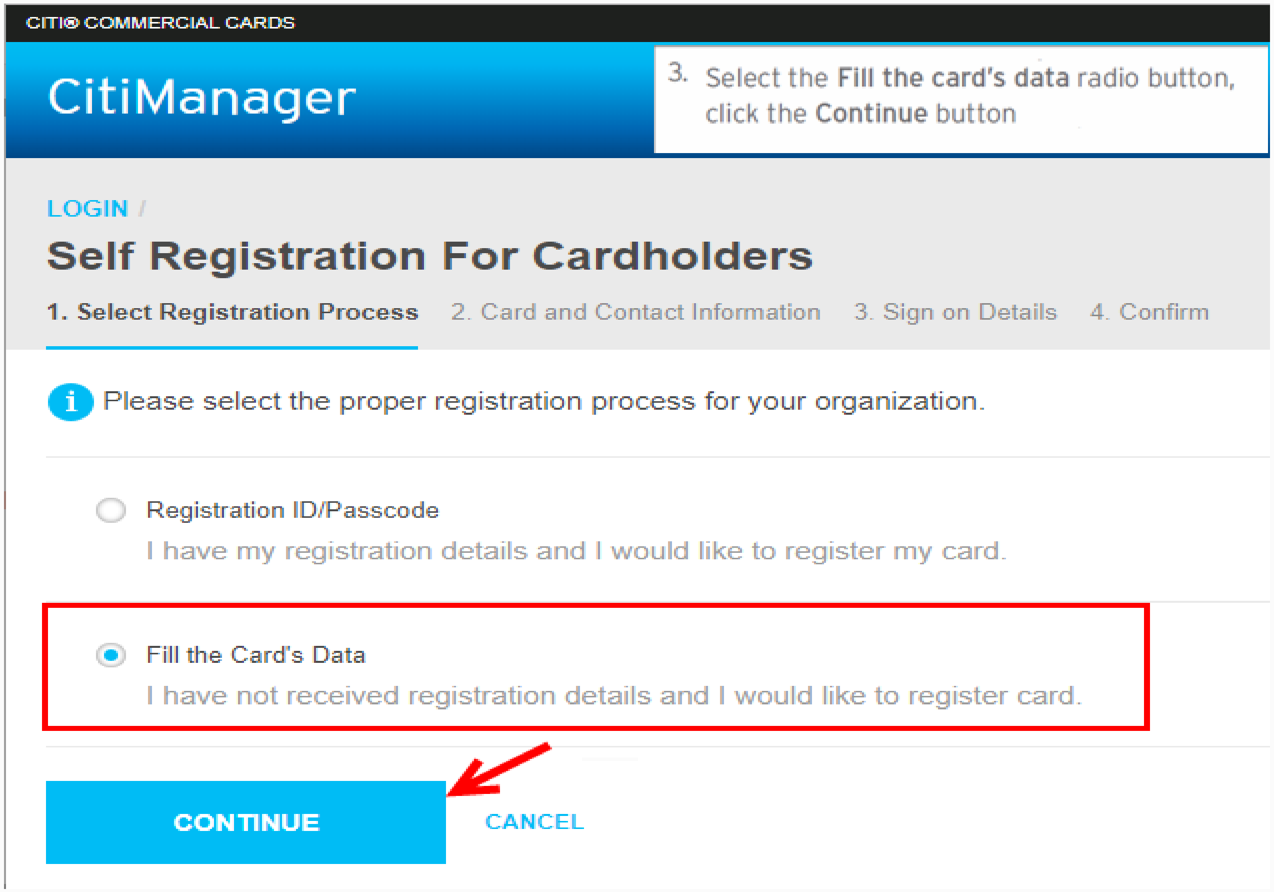


Registering Your Card on CitiManager

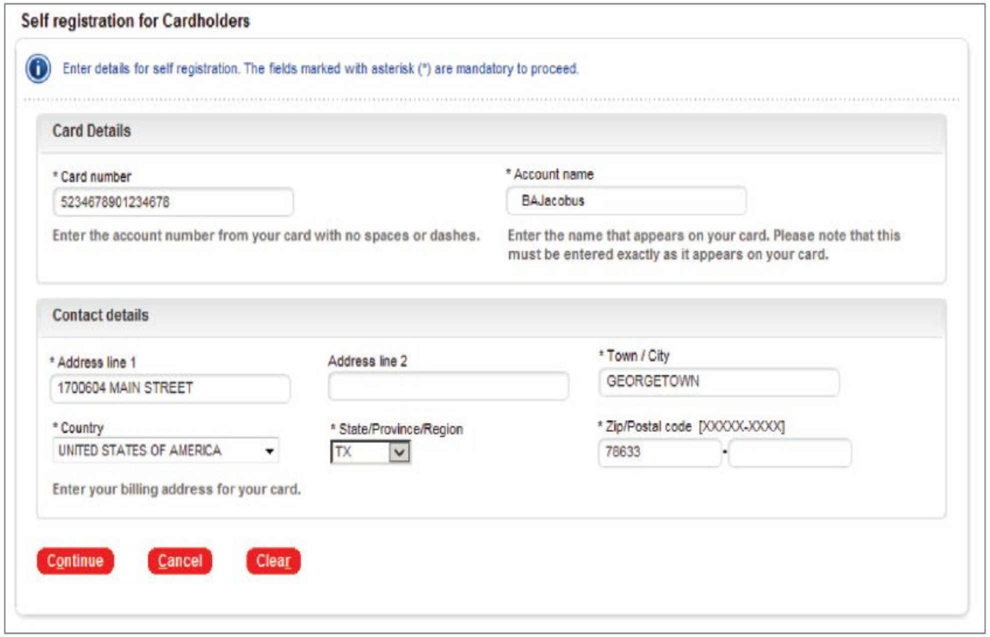
Registration Website



Self-Registration Options



Registration Details



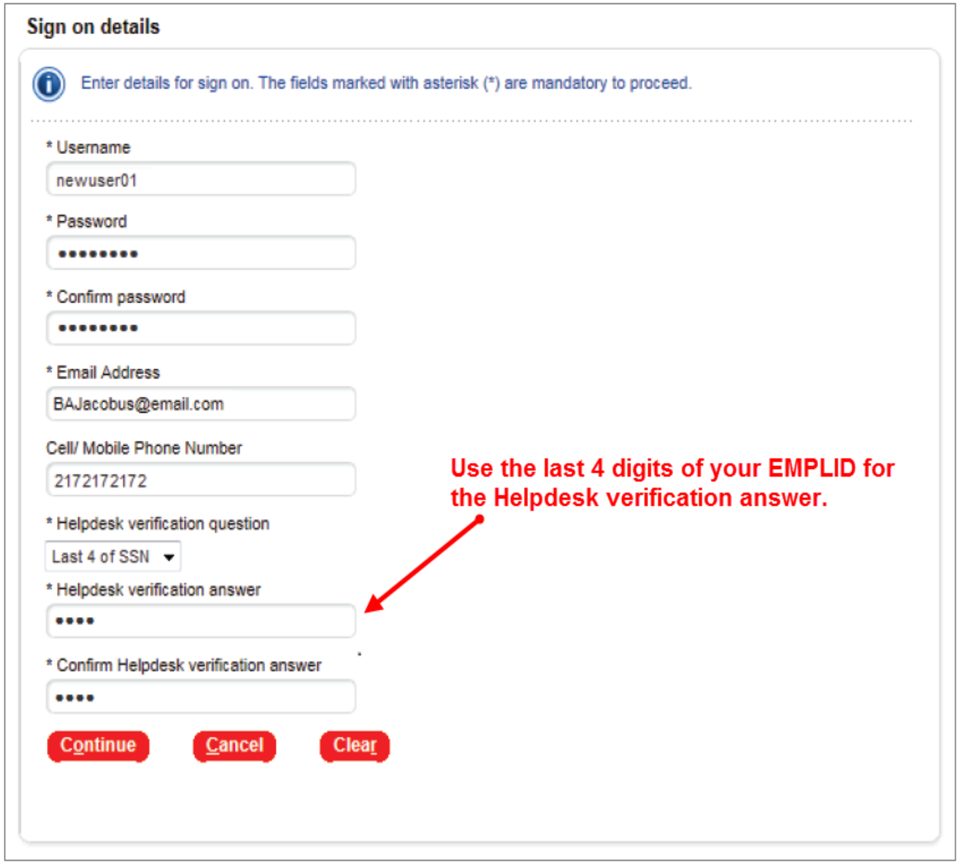
Self-registration for Cardholders Screen – Card Details

4. In the **Card number** field, type your card number exactly as it appears on your billing statement, no spaces or dashes.
5. In the **Account name** field, type your account name exactly as it appears on your billing statement.
6. In the **Contact details** section, enter the billing address for your card exactly as it appears on your billing statement. An asterisk (*) indicates a required field.

   Note: If you use a nine-digit zip code, enter all nine digits.
7. Click the **Continue** button.

   The Sign on details screen displays.

Sign On Details



Sign on details

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

* Username: newuser01
* Password: •••••••••
* Confirm password: •••••••••
* Email Address: BAJacobus@email.com

Cell/ Mobile Phone Number: 2172172172

* Helpdesk verification question: Last 4 of SSN
* Helpdesk verification answer: ••••
* Confirm Helpdesk verification answer: ••••

Continue | Cancel | Clear

Use the last 4 digits of your EMPLID for the Helpdesk verification answer.

Sign on details Screen

8. Complete the required fields (*) for self-registration.

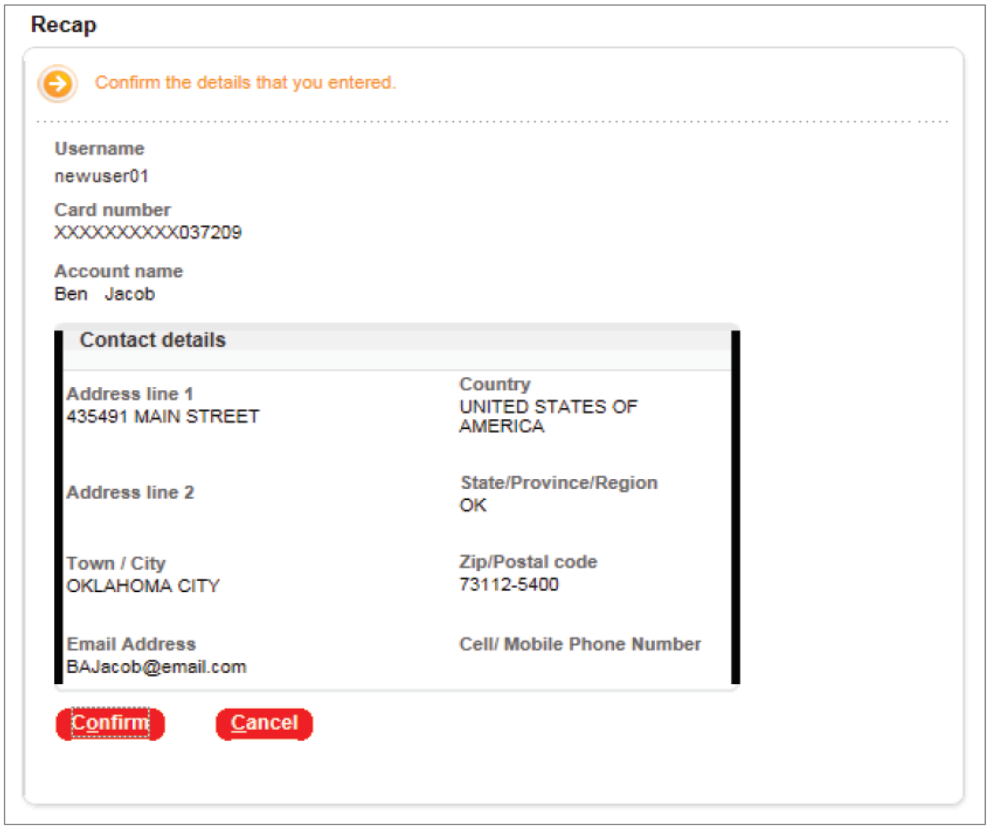
   Note: The username and password requirements display in a pop-up window as you enter them. An **X** displays until the requirement has been fulfilled.

   The fields displayed and the username and password requirements vary based on your company's setup.

9. When you are finished, click the **Continue** button.

   The Recap screen displays.

Registration Recap



Recap Screen

10. Review the information that displays and when you are finished, click the **Confirm** button.

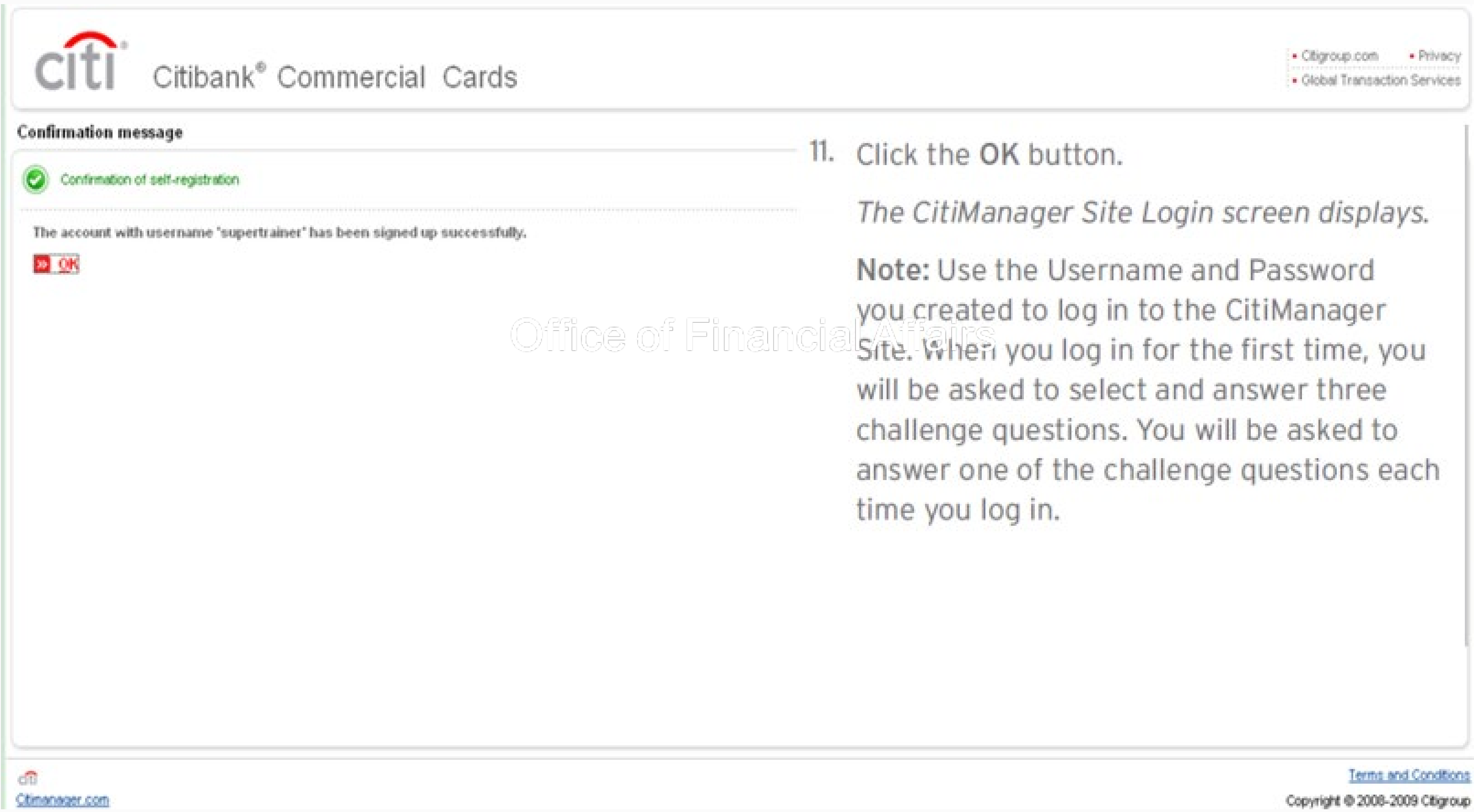
    The Confirmation message screen displays.

11. Click the **OK** button.

    The CitiManager Site Login screen displays.

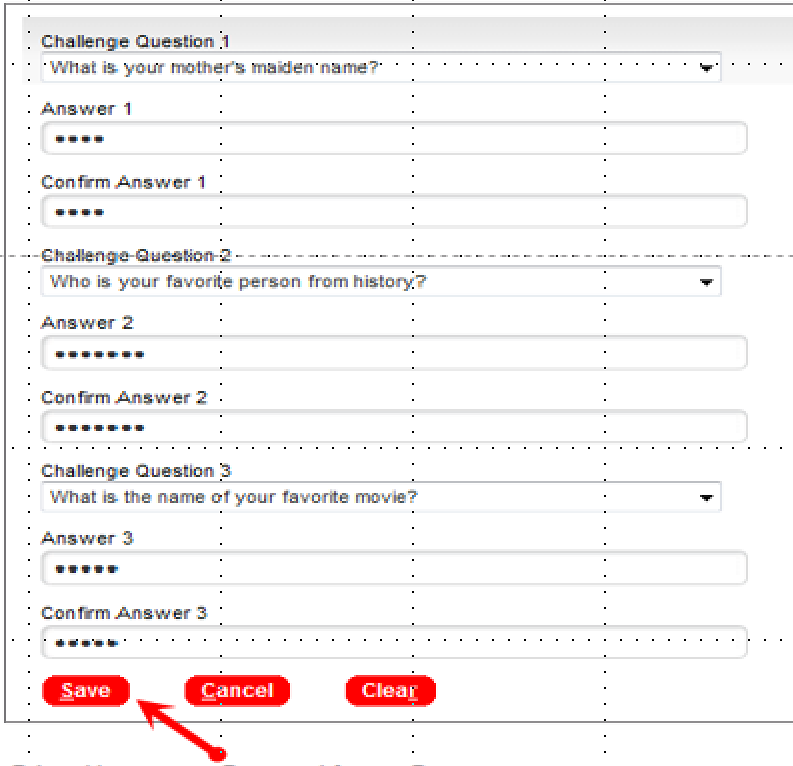
    Note: Use the Username and Password you created to log in to the CitiManager Site. When you log in for the first time, you will be asked to select and answer three challenge questions. You will be asked to answer one of the challenge questions each time you log in.

Registration Confirmation



Challenge Questions

Screen

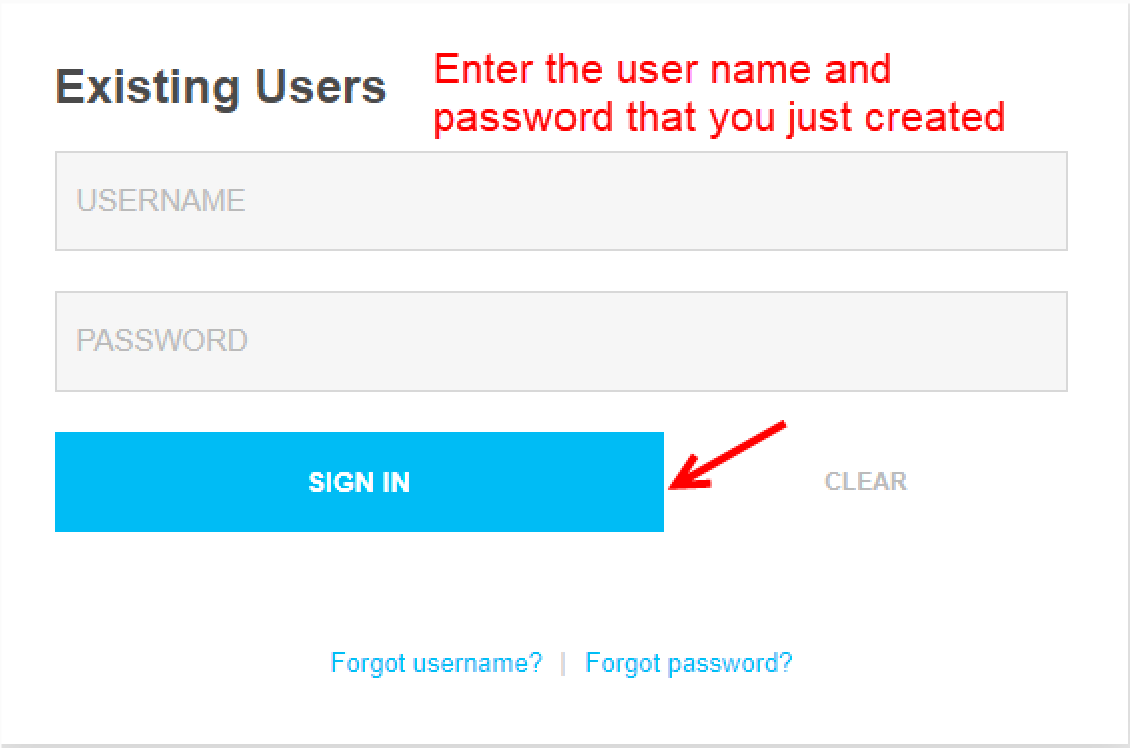


12. Select and answer three challenge questions. You will be asked to answer one of the challenge questions each time you log in.

Challenge Question Screen

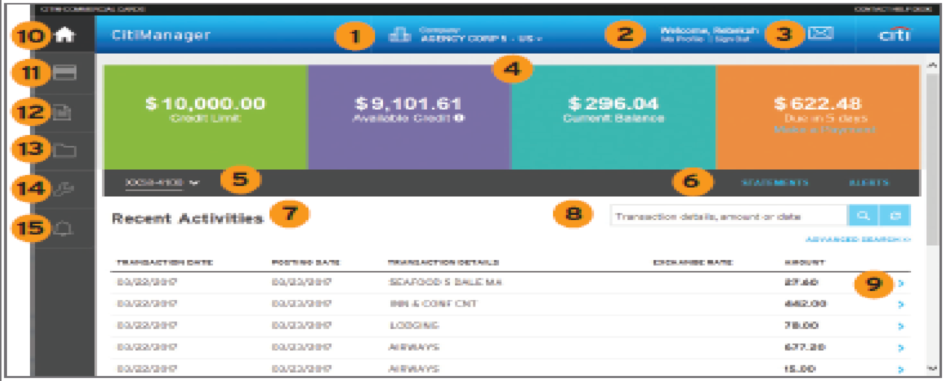
Navigating CitiManager

CitiManager Site Login



Home Screen Components

Screen



Descriptions

Header

1. View your company. If you have access to more than one, you may select it using the drop-down list.
2. Access **My Profile** functions or sign out of the CitiManager Site.
3. View the **Message Board**.

Screen Components

4. View high-level account metrics such as credit limit, available credit, current balance and amount due. If your organization allows you to make payments, the **Make a Payment** link displays. For centrally billed accounts, the amount due by your company displays.
5. Use the account drop-down arrow to toggle between card accounts if you have more than one.
6. Use the quick links to navigate to the **Statements** and **Alerts** screens.
7. View list of transactions that posted since your last statement.
8. Use the search field to perform a basic transaction search by the details, amount or date or click the **Advanced Search** link to narrow your search.
9. Click the > **Forward** arrow to navigate to the **Statements** screen.

Side Bar Navigation

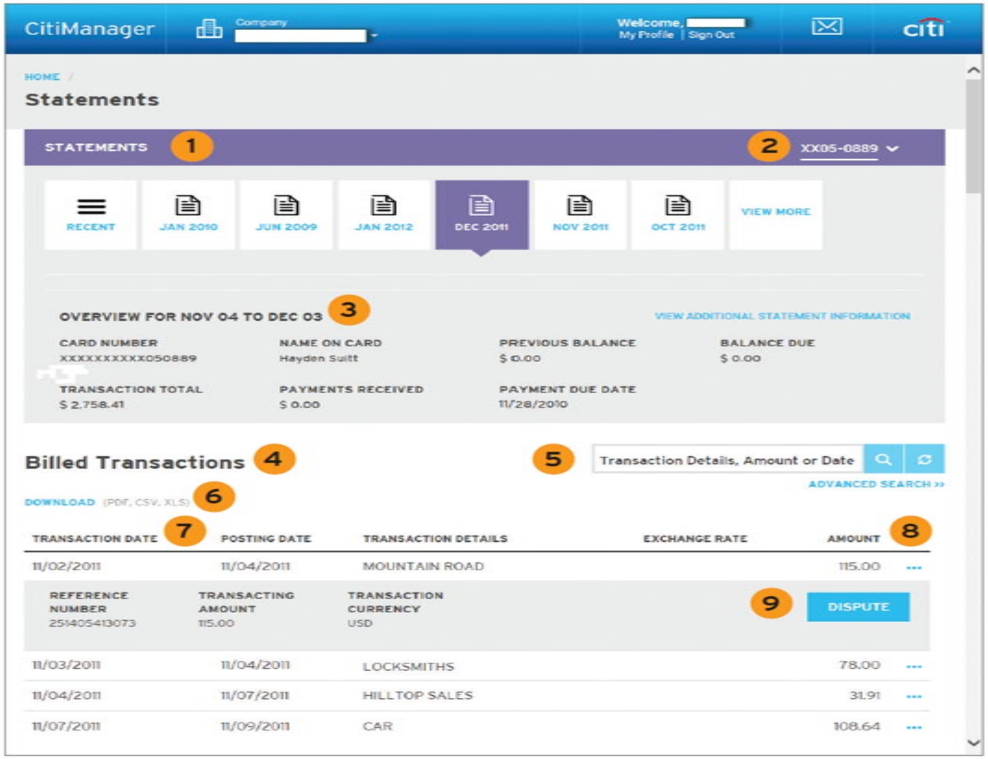
Screen

Descriptions

Side Navigation Bar

10. Click the **Home** button to return to the Home screen.
11. Click the **Cards** button to view an overview of your card account, payment information, statements, aging of balance, recent transactions and your card contact information.
12. Click the **Statements** button to select a monthly statement to view and also view recent activity, change your paperless settings and view disputes.
13. Click the **Resources** button to view messages, access FAQs and Links & Help.
14. Click the **Tools** button to navigate to other online tools if you have access.
15. Click the **Alerts** button to manage your alert subscriptions, view the audit log and view on-demand mobile alert information.

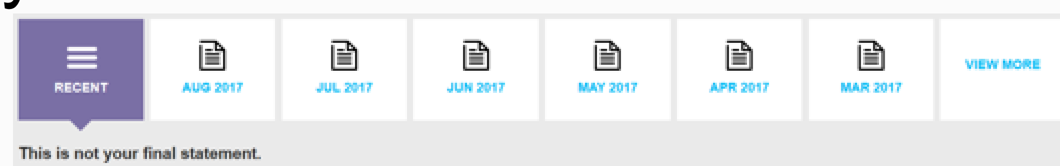
Statements



1. The **Statements** section displays an overview of your statement and allows you to toggle between statements by clicking the icon for the statement date.
2. If you have more than one card account, use the drop-down arrow to toggle between card accounts.
3. The overview section provides balance and payment information for the dates displayed.
4. A list of billed or recent transactions for the statement display.
5. Use the search field to perform a basic transaction search by the details, amount or date or click the **Advanced Search** link to narrow your search.
6. Click the **Download** link to download a statement.
7. The list of transactions will display the transaction date, posting date, details and amount.
8. To view additional transaction detail or dispute a transaction, click the ellipsis (...) link that displays on the right-side of the row you wish to expand.
9. Click the **Dispute** button to dispute a transaction. The row must be expanded to view the dispute button.

Recent Activity & Authorizations

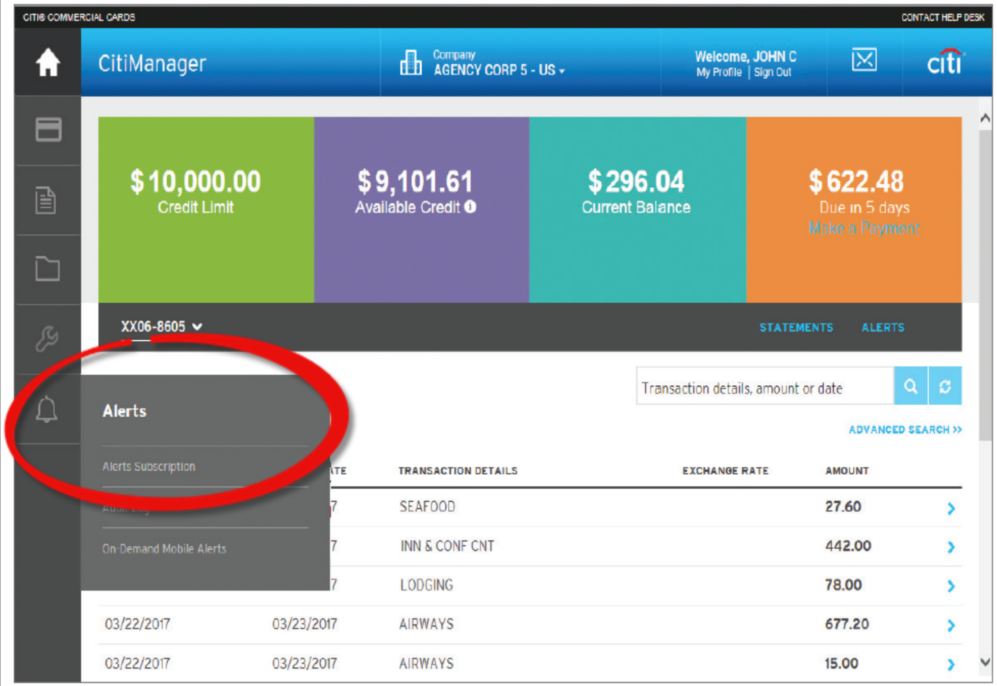
- From the Statements page click on the Recent tab and scroll to the bottom of the page to view your unbilled transactions and to see what has been authorized (or declined) for your card account.



Setting Alerts

Home Screen - Alerts

Screen



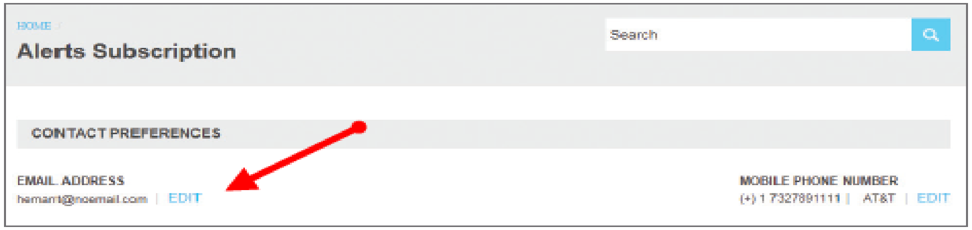
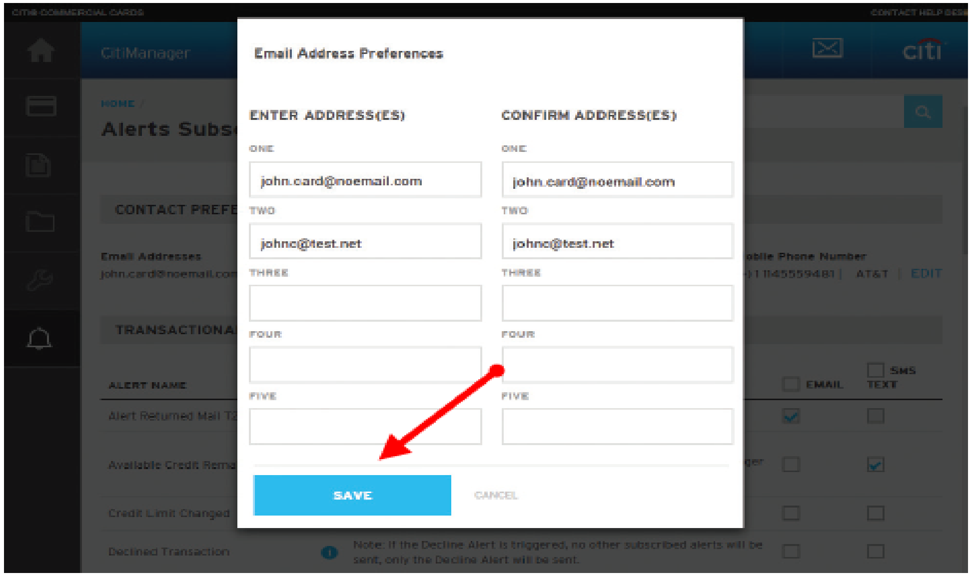
Home Screen – Alerts

Step/Action

1. From the CitiManager Site side navigation bar, position your mouse over the **Alerts** button and then click the **Alerts Subscription** link.

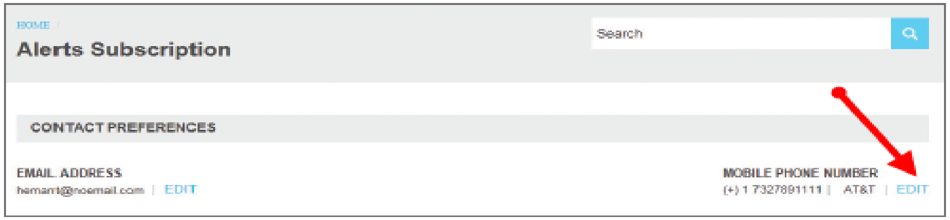
   The Alerts Subscription screen displays.

Alerts Subscription - Email

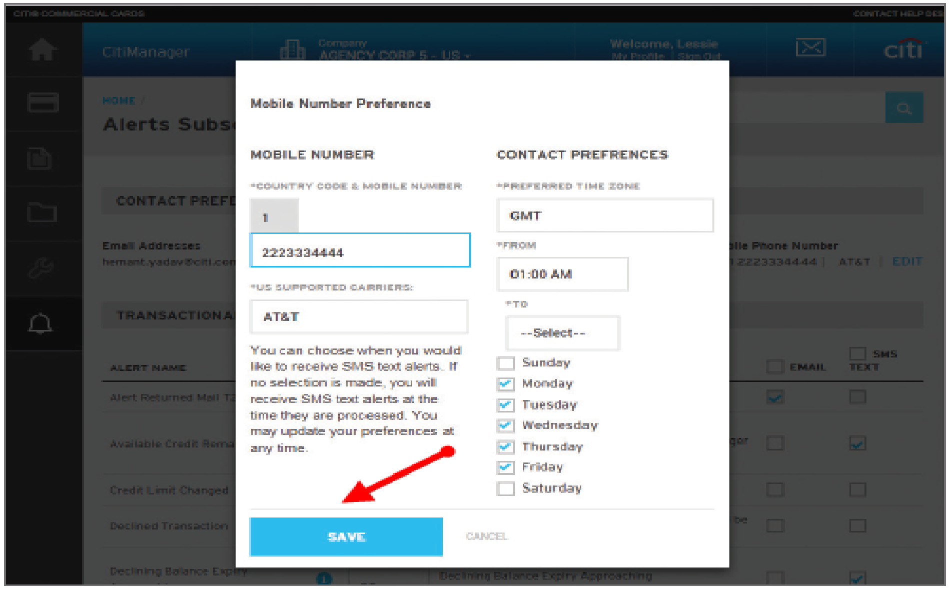
Screen	Step/Action
 Alerts Subscription Screen  Alerts Subscription Screen – E-mail Address Preferences	2. To enter/edit the email address(es) where you want alerts sent, click the **Email Addresses – Edit** link and complete the following steps when the **Email Address Preferences** window opens: a) Type and confirm up to five email addresses. b) Click the **Save** button. **Please verify your email address and add the email address of the contact person listed on your application.**

Alerts Subscription–SMS Text

Screen	Step/Action



Alerts Subscription Screen



Alerts Subscription Screen – Mobile Number Preference

3. To edit your mobile number, your mobile carrier, and your notification preferences, click the **Mobile Phone Number – Edit** link and complete the following steps when the **Mobile Number Preferences screen** opens:

   a) In the **Country Code** and **Mobile Number** field, type a valid mobile phone number where you wish alerts to be sent.

   Note: Only numeric values are allowed in this field. The country code defaults based on the country associated with your profile.

   b) Click in the **Supported Carriers** field and select your mobile carrier.

   Note: If Sprint is your carrier, you are automatically enrolled in this subscription notification. This is a requirement of Sprint. Canadian users are automatically enrolled in this subscription due to regulations in Canada.

   c) Click in the **Preferred Time Zone** field and select your preferred time zone.

   d) Click in the **From** and **To** fields and select the time-frame in which you would like to receive alerts.

   e) From the list of weekdays, select the days you would like to receive alerts.

   f) Click the **Save** button.

Transactional Alerts

TRANSACTIONAL ALERTS

ALERT NAME			☐ EMAIL	☐ SMS TE
Alert Returned Mail T2			☐	☐
Available Credit Remaining (%)	20	Select % of remaining credit level which should trigger an alert, e.g. 5%.	☑	☐
Dispute Resolution			☑	☐
High Value Transaction	0	Provide the transaction amount which would trigger an alert. Enter a positive number up to 15 digits in length, excluding decimals, e.g. 500.	☑	☐
Payment Due/Invoice			☑	☐
Payments Received			☑	☐
Reminder: Payment Past Due / Overdue			☑	☐

4. To subscribe to alerts, select the **Email Alerts and/or SMS (Mobile Alerts) checkbox(es)** for each of the alerts you wish to receive.

   To unsubscribe to alerts, deselect the **Email Alerts** and/or **SMS (Mobile Alerts)** checkbox(es) for the alerts you no longer wish to receive.

   Note: Some alerts may be greyed out and unavailable. Available alerts are set by your Program Administrator. Alerts that are selected and greyed out are mandatory.

   For more information about each alert, click the information icon next to the alert name.

   Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the **Available Credit Remaining %** alert, you must select the desired **Available Credit Remaining %**. When the selected percent of remaining credit level is met, you will receive an alert.

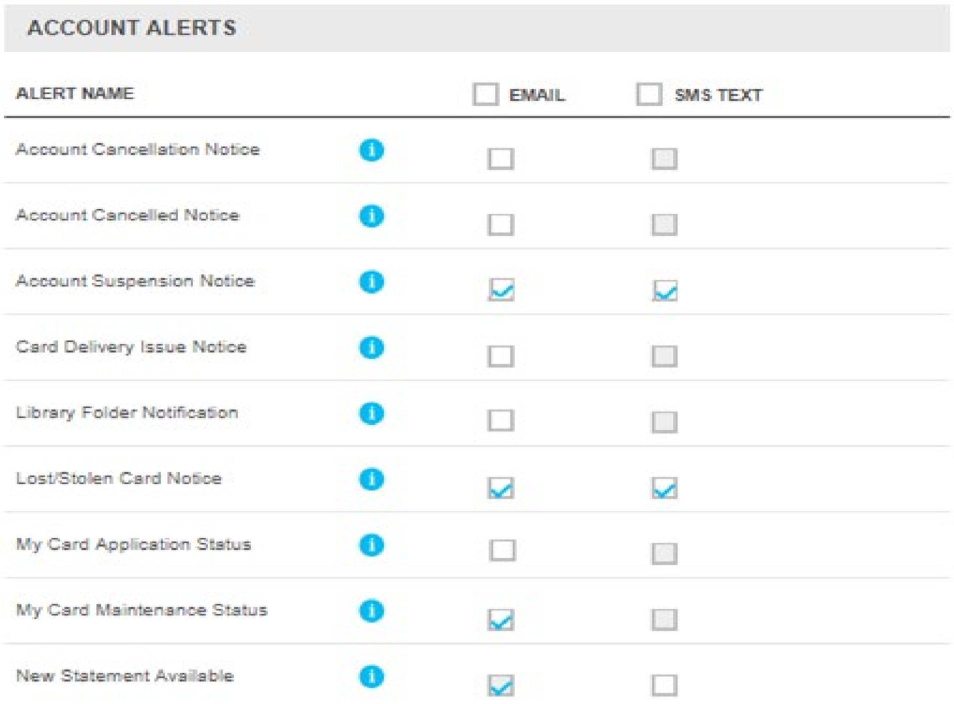
5. When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox.

   Note: If you do not agree to the terms and conditions, you will not be able to receive alerts.

6. Click the **Save** button.

Select the email and text options for transactional and account alerts as shown.

Account Alerts



Select the email and text options for transactional and account alerts as shown.

4. To subscribe to alerts, select the **Email Alerts and/or SMS (Mobile Alerts) checkbox(es)** for each of the alerts you wish to receive.

   To unsubscribe to alerts, deselect the **Email Alerts** and/or **SMS (Mobile Alerts)** checkbox(es) for the alerts you no longer wish to receive.

   Note: Some alerts may be greyed out and unavailable. Available alerts are set by your Program Administrator. Alerts that are selected and greyed out are mandatory.

   For more information about each alert, click the information icon next to the alert name.

   Some alerts require you to type or select a threshold setting that will trigger the alert. For example, for the **Available Credit Remaining %** alert, you must select the desired **Available Credit Remaining %**. When the selected percent of remaining credit level is met, you will receive an alert.

5. When you are finished, review the terms and conditions at the bottom of the screen and if you agree, select the checkbox.

   Note: If you do not agree to the terms and conditions, you will not be able to receive alerts.

6. Click the **Save** button.

Text Message Terms & Agreement

TERMS & CONDITIONS

☑ Terms & Conditions: Message and Data Rates May Apply. For a list of supported carriers, click here.
To suspend SMS text alerts, uncheck the SMS text alerts above or text STOP to 462484 (GOCITI).

For help, text HELP to [#] from your mobile device. 462484 (GOCITI).

SAVE

My Profile

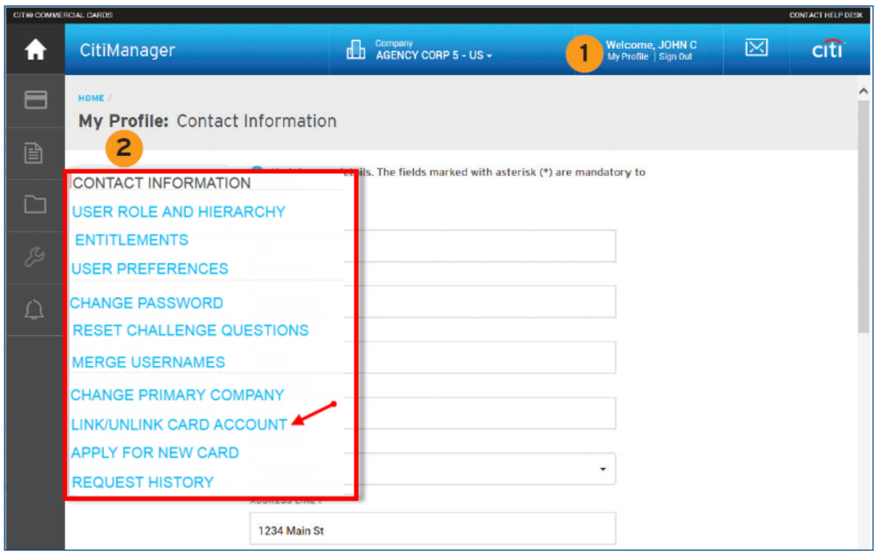
My Profile Overview

- The My Profile screen allows you to update the following:
  - User preferences such as language, date and time format and currency
  - Password
  - Reset challenge questions
  - Merge CitiManager Site user names if you have more than one
  - Link/Unlink another card account

My Profile Links

My Profile Screen

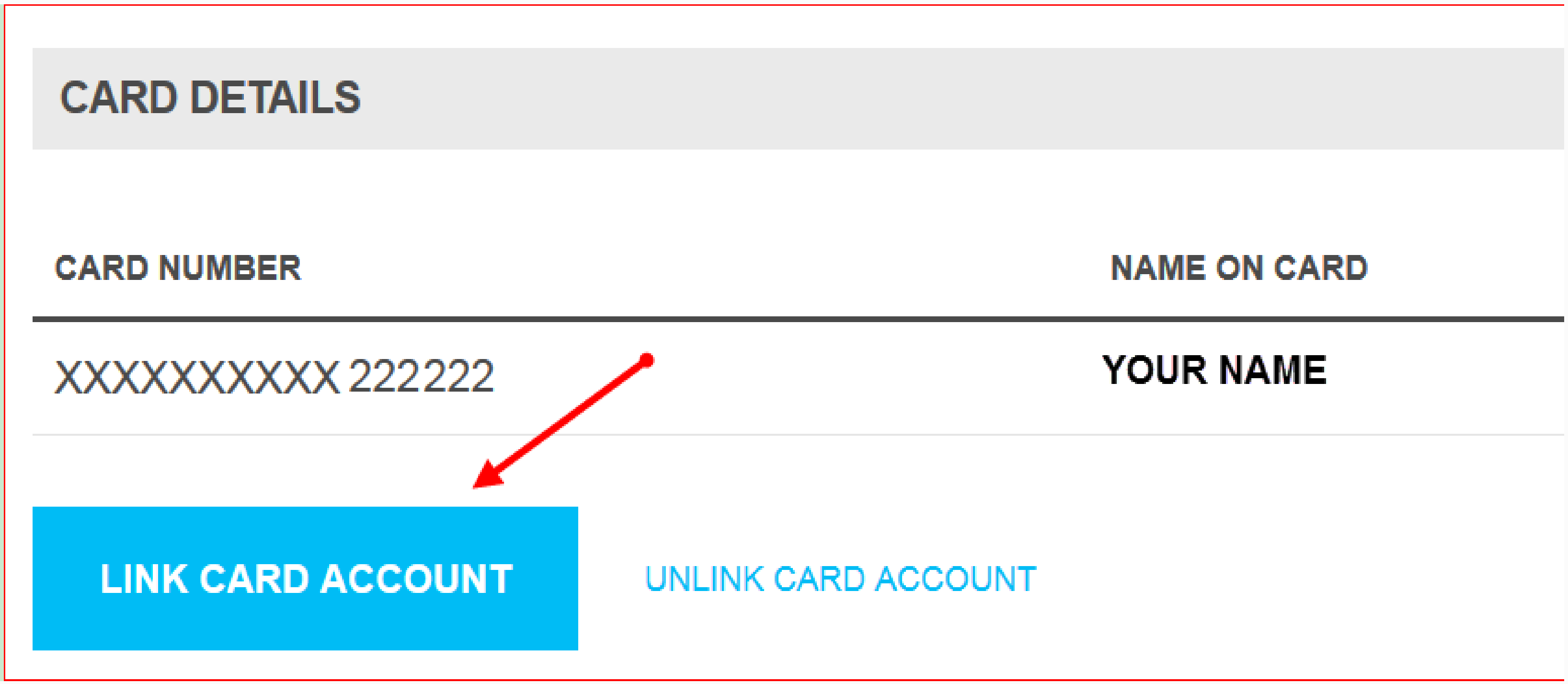
Screen



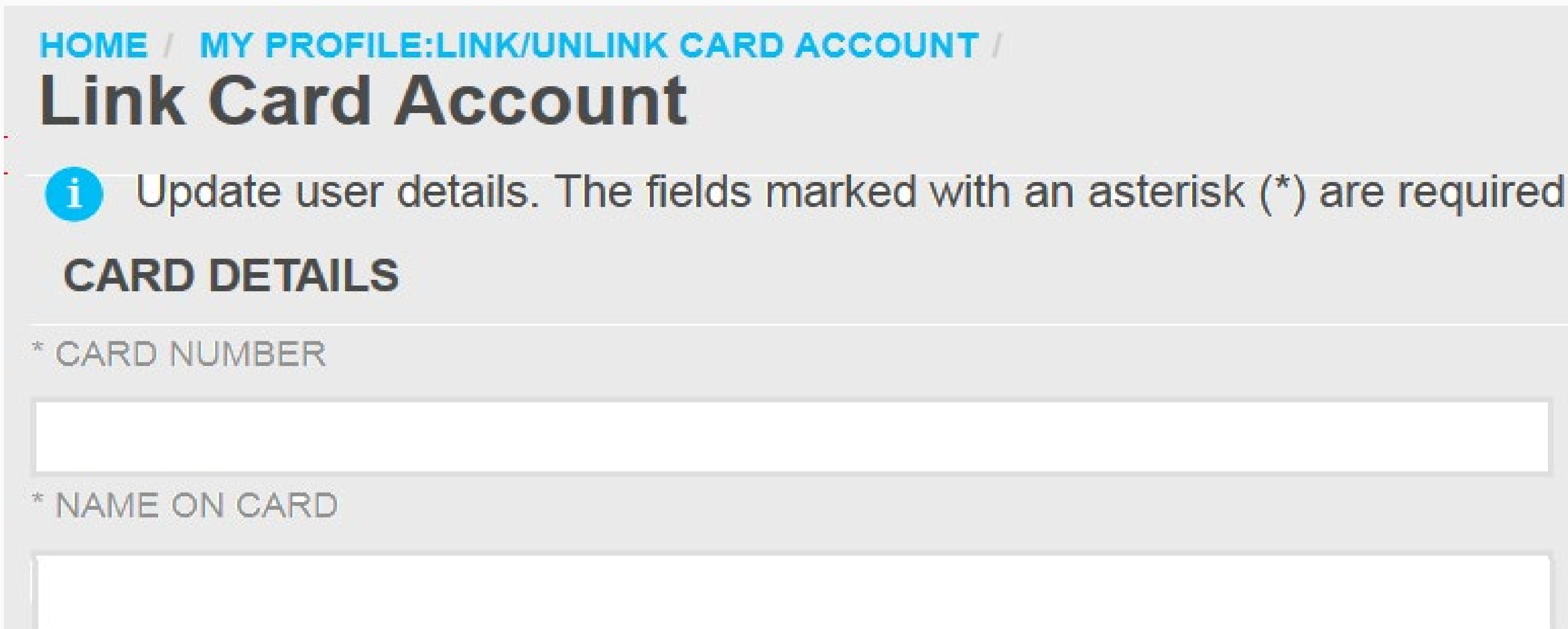
Descriptions

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.

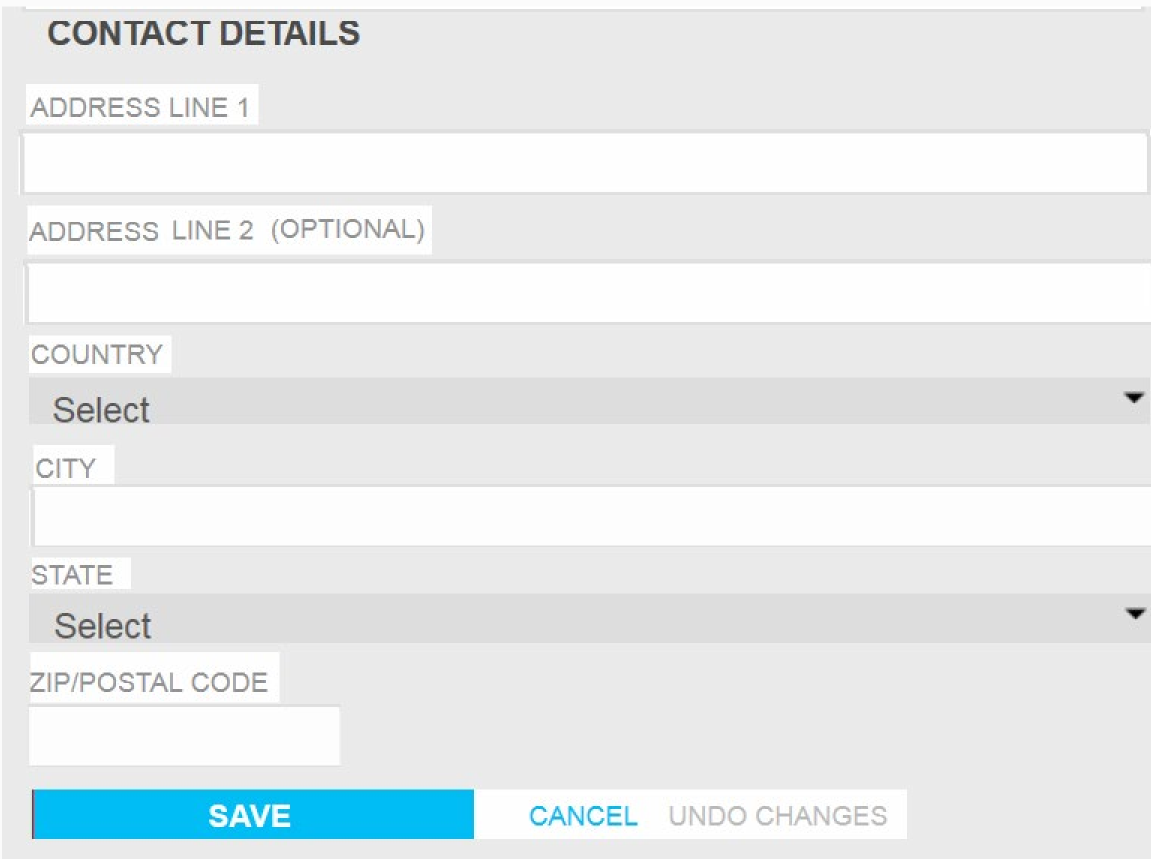
Link Card Account



Link Card Account Details



Link Card Account Details



Questions?


STATE OF TEXAS
citi
TRAVEL
FOR OFFICIAL USE ONLY
5533 0012 3456 7899
Valid from Expiration date
11/10 11/12
JOHN SMITH
MasterCard
STATE OF TEXAS
TAX EXEMPT
citi
PURCHASING
5533 0012 3456 7899
11/10 11/12
JOHN SMITH
MasterCard