Assign Alternate Users

OVERVIEW

Use this procedure to assign alternate users to a card account.

KEY CONCEPTS

This function allows you to provide others access to CitiManager to view account information, make maintenance requests (if your program allows), or make payments to individually billed accounts on behalf of the cardholder.

STEP-BY-STEP INSTRUCTIONS

To Assign Alternate Users:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | From the CitiManager Home screen, click the Statement tab.  
      | The Statement screen displays. |
| 2.   | Click the Account Info tab.  
      | The Account Info screen displays. |
| 3.   | Click the Assign button.  
      | The Search users screen displays.  
      | **Note:** You can grant access to an existing CitiManager user by selecting them using the search criteria as described in the following steps. To assign a new user, proceed to Step 10. |
| 4.   | To specify a search parameter, from the Parameters drop-down list select the desired search criteria.  
      | **Note:** The search options are Last Name, First Name and Username.  
      | A text entry box or drop-down list displays to the right of the search parameter fields. |
### Assign Alternate Users (Cont'd)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>To specify a qualifier for the selected search parameter, from the qualifier drop-down, select the desired qualifier. <strong>Note:</strong> Available qualifiers include equals, starts with, ends with and contains. The contains qualifier can act as a wildcard filter. You can choose up to four parameters to perform your search.</td>
</tr>
<tr>
<td>6.</td>
<td>Based on the search parameter selected, in the text field type the desired search criteria or select it from the drop-down list.</td>
</tr>
<tr>
<td>7.</td>
<td>To add additional search parameters, repeat Steps 3–6. Otherwise, continue to Step 8.</td>
</tr>
</tbody>
</table>
| 8.   | Click the **Search** button.  
*The search results display based on the parameters entered.* |
| 9.   | Click the radio button for the user to be assigned, and then click the **OK** button.  
*A confirmation message displays and you are returned to the Account Info screen.* |
| 10.  | To create a new user, click the **Create user** link.  
*The Create User screen displays.* |
| 11.  | Enter the required information for the new user in the sections provided.  
**Note:** The available sections are Personal details, Contact details, Company, User Role(s) and Hierarchy, and Entitlements. Please ensure that you review the entitlements tab before saving to ensure all the required entitlements are selected. This is important as Statements and Unbilled Transactions are not considered default entitlements. |
| 12.  | Click the **Continue** button.  
*A screen displays requiring confirmation of the details entered for the new user.* |
| 13.  | Click the **Save** button.  
*A confirmation screen displays.  
**Note:** Registration details will be sent via email to the newly created user granting them access to this account.* |
| 14.  | Click the **OK** button.  
*The Account Info screen displays.  
**Note:** The new user displays in the Alternate Users section with a status of Unregistered.* |
Unlink Current Card Account

OVERVIEW

Use this procedure to remove a card account from your account profile.

KEY CONCEPTS

Cardholders who have added a card account can remove a card account from the Select a Card drop-down list.

This function can be used to remove accounts that have been closed or reported as lost-stolen, where a new account has been issued.

STEP-BY-STEP INSTRUCTIONS

To Unlink Current Account Card:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the CitiManager Home screen, click the Statement tab. The Statement screen displays.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the Account Info tab. The Account Info screen displays.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Unlink current card account button. A confirmation message displays.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the Confirm button. The account is unlinked.</td>
</tr>
</tbody>
</table>
## Link Another Card Account (Cont'd)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 6.   | In the **Contact details** section, type the address information in the required fields or select it from the drop-down list.  
**Note:** The address information must be entered exactly as it appears on your card insert or card billing statement. |
| 7.   | Click the **Save** button.  
*The Select a Card drop-down list displays with your registered account.* |
| 8.   | From the **Select a Card** drop-down list, select the desired card account.  
*The Cardholder Account Information screen displays the registered account.* |