Online Review and Approve Cardholder

March 31, 2020
OLRA – Cardholder Review

- Log into CitiManager
- Select Webtools>Transaction Management
Select the hierarchy for which you are a cardholder
Select the appropriate statement
View your transactions
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Select the three dots to see transaction details
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Select More to upload a receipt
Select Upload to upload a receipt.
Select Browse to find the receipt file, then Upload to attach the receipt.
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Verify receipt uploaded correctly
Once all receipts are uploaded and marked Yes, click Submit Statement

Move the slider from No to Yes
The cardholder will receive an email telling them they have a rejected statement.

To: Mr. Cardholder  
Subject: [EXTERNAL] Citimanager Transaction Management System - PURCHASE - Centrally Billed - Statement rejected

The CitiDirect electronic statement you submitted has been rejected by Mr. Approving Official on Mar 30 2020 2:08PM. Please review your statement and resubmit.

View your Citi® Commercial Card account information on the CitiManager® site at www.citimanager.com/login, then navigate to Web Links and access the Citimanager® Transaction Management System. You may modify your email settings under the Assistance menu.

The cardholder can then log into CitiManager, navigate to Transaction Management, and then see the rejected statement.
At this time CTMS does not identify the transactions that were rejected, so the cardholder must select the 3 dots on each transaction to find the rejected transactions.
The cardholder can select Read under NOTE, and the notes the Approving Official made can be seen. The cardholder will add the documents requested and resubmit the statement. Then the cardholder’s statement will be routed back to the approving official and reflect a “pending approval status.”