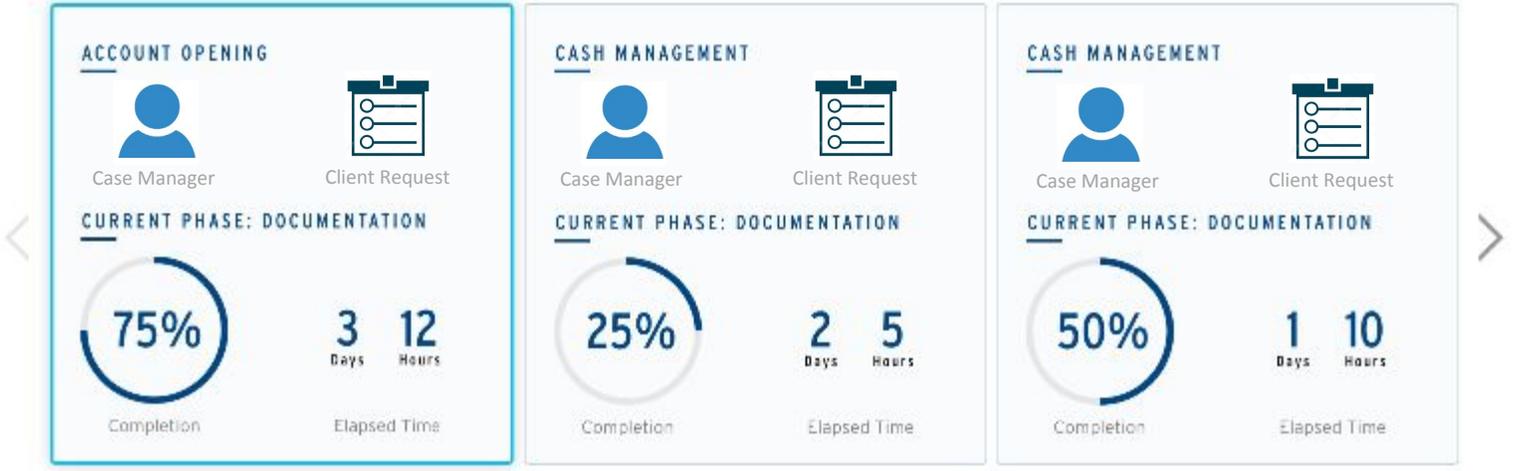


Landing Page – Documentation Tab

Pls create case manager and client request icons in dark blue color



DOCUMENTATION | UPLOADED DOCUMENTS | IMPLEMENTATION | TRAINING

Business Profile	Regulatory
Product Setup	CIT Review
Account Signers	Signatures

Next Step
Under Account Signers, complete the General Delegation of Operating Authority section.

[GO TO STEP](#)

Landing Page – Documentation Tab

When you roll over the case manager icon you should get what is shown in the second tile – **it should appear over the tile 1**

When you roll over the client request tile you should get what is in tile 3 – **it should appear over the 1st tile**

ACCOUNT OPENING

Case Manager Client Request

CURRENT PHASE: DOCUMENTATION

75% Completion

3 Days 12 Hours Elapsed Time

YOUR CASE MANAGER

Susan Dalgleish

Product Associate
(212) 123-4567
s.dalgleish@citi.com

YOUR REQUEST

- 4 Checking Accounts
- 2 Money Market Accounts
- 2 Savings Accounts
- 1 CD Account

Requested On: 12/13/17

Alerts

ACCOUNT OPENING

Case Manager | Client Request

CURRENT PHASE: DOCUMENTATION

75% Completion | **3 Days 12 Hours** Elapsed Time

CASH MANAGEMENT

Case Manager | Client Request

CURRENT PHASE: DOCUMENTATION

25% Completion | **2 Days 5 Hours** Elapsed Time

CASH MANAGEMENT

Case Manager | Client Request

CURRENT PHASE: DOCUMENTATION

50% Completion | **1 Day 10 Hours** Elapsed Time

DOCUMENTATION | [UPLOADED DOCUMENTS](#) | [IMPLEMENTATION](#) | [TRAINING](#)

Business Profile	Regulatory
Product Setup	Citi Review
Account Signers	Signatures
Next Step	

Alerts

- Work Order** [Account Opening](#)
Time 10/13/17 18:53:00 EST
Message W-9 document has been rejected. Please upload the correct version of this file.
- Work Order** [Account Opening](#)
Time 10/13/17 18:53:00 EST
Message Mauris ut porttitor metus. Nam posuere ut urna vitae vehicula. Phasellus nec pellentesque est.
- Work Order** [Account Opening](#)
Time 10/13/17 18:53:00 EST
Message W-9 document has been rejected. Please upload the correct version of this file.
- Work Order** [Account Opening](#)
Time 10/13/17 18:53:00 EST
Message Mauris ut porttitor metus. Nam posuere ut urna vitae vehicula. Phasellus nec pellentesque est.
- Work Order** [Account Opening](#)

Uploaded Documents Tab

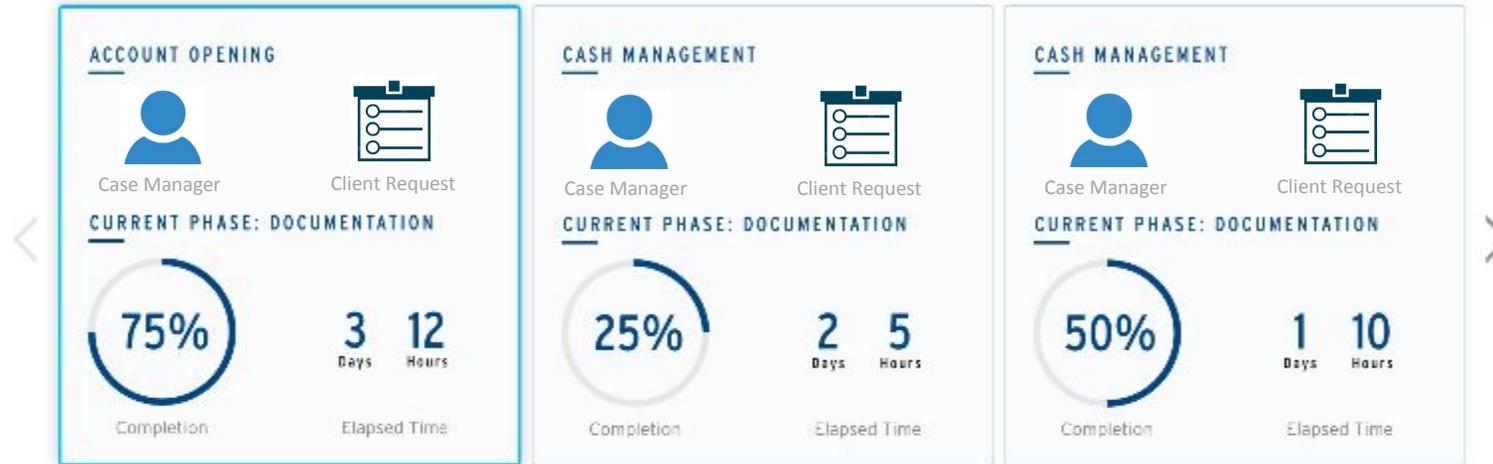


[DOCUMENTATION](#)
 [UPLOADED DOCUMENTS](#)
 [IMPLEMENTATION](#)
 [TRAINING](#)

Document	Filename	Uploaded On	Remove
W-9	User_W-9_2017.pdf	12-Nov-2017 09:15pm EST	
Birth Certificate	Title_of_document.pdf	12-Nov-2017 09:15pm EST	
Drivers License	Another Document.pdf	12-Nov-2017 09:15pm EST	
Letter of Authorization	Upload File		
Declaration of Benefits	Upload File		
Legal Rights	Upload File		
Legal Something	Upload File		



Implementation Tab



DOCUMENTATION

UPLOADED DOCUMENTS

IMPLEMENTATION

TRAINING

Account Opening



Setup Online Banking



Next Step

Your Client Advisor is creating your online banking profile and will alert you when it is complete.



Training Tab



DOCUMENTATION

UPLOADED DOCUMENTS

IMPLEMENTATION

TRAINING

Online Banking

Next Step

Lesson 5: Section 2
Adding new employees to your account

[VIEW LESSON](#)

ACH WCM

Next Step

Lesson 1: Section 4
Creating entitlements

[VIEW LESSON](#)

ACH Blocks/Filters/ Positive Pay

Next Step

