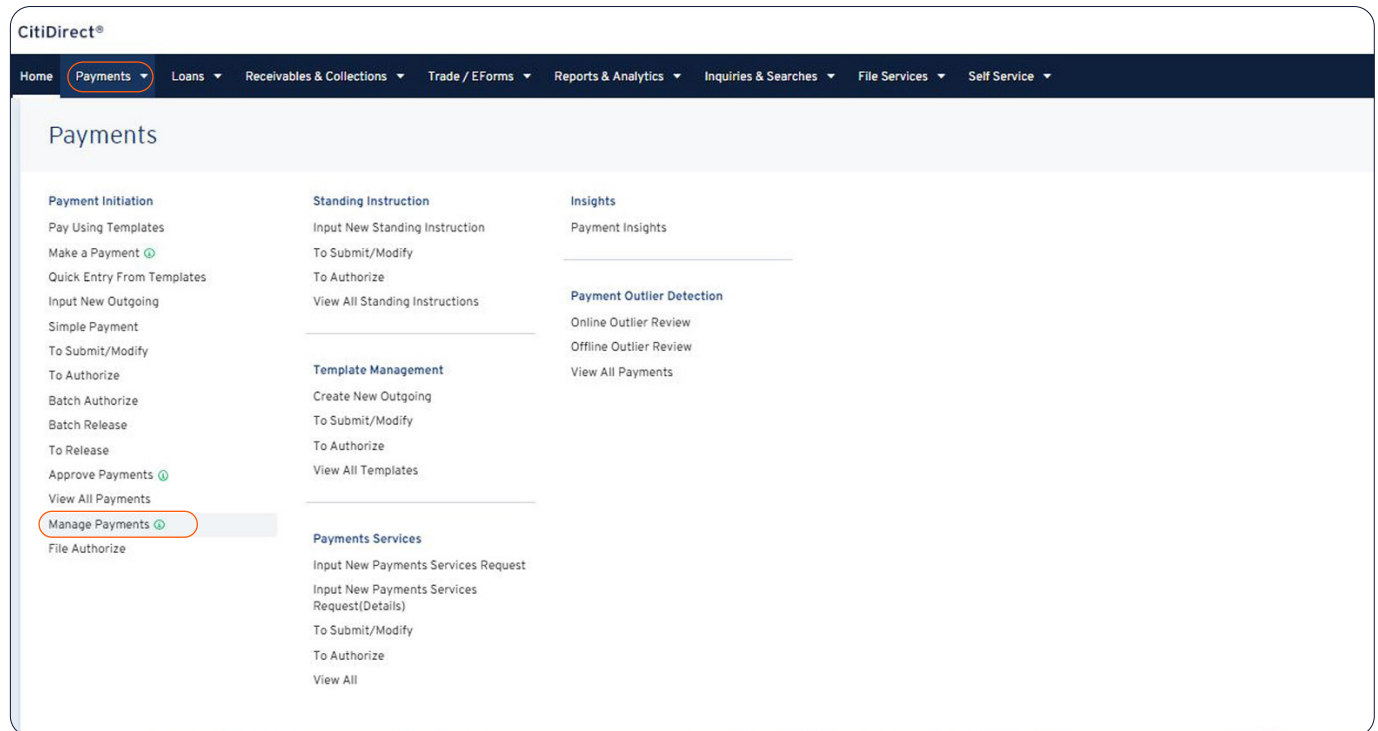# CitiDirect® Manage Payments Quick Reference Guide

Hover over the **Payments** menu option and select **Manage Payments** menu
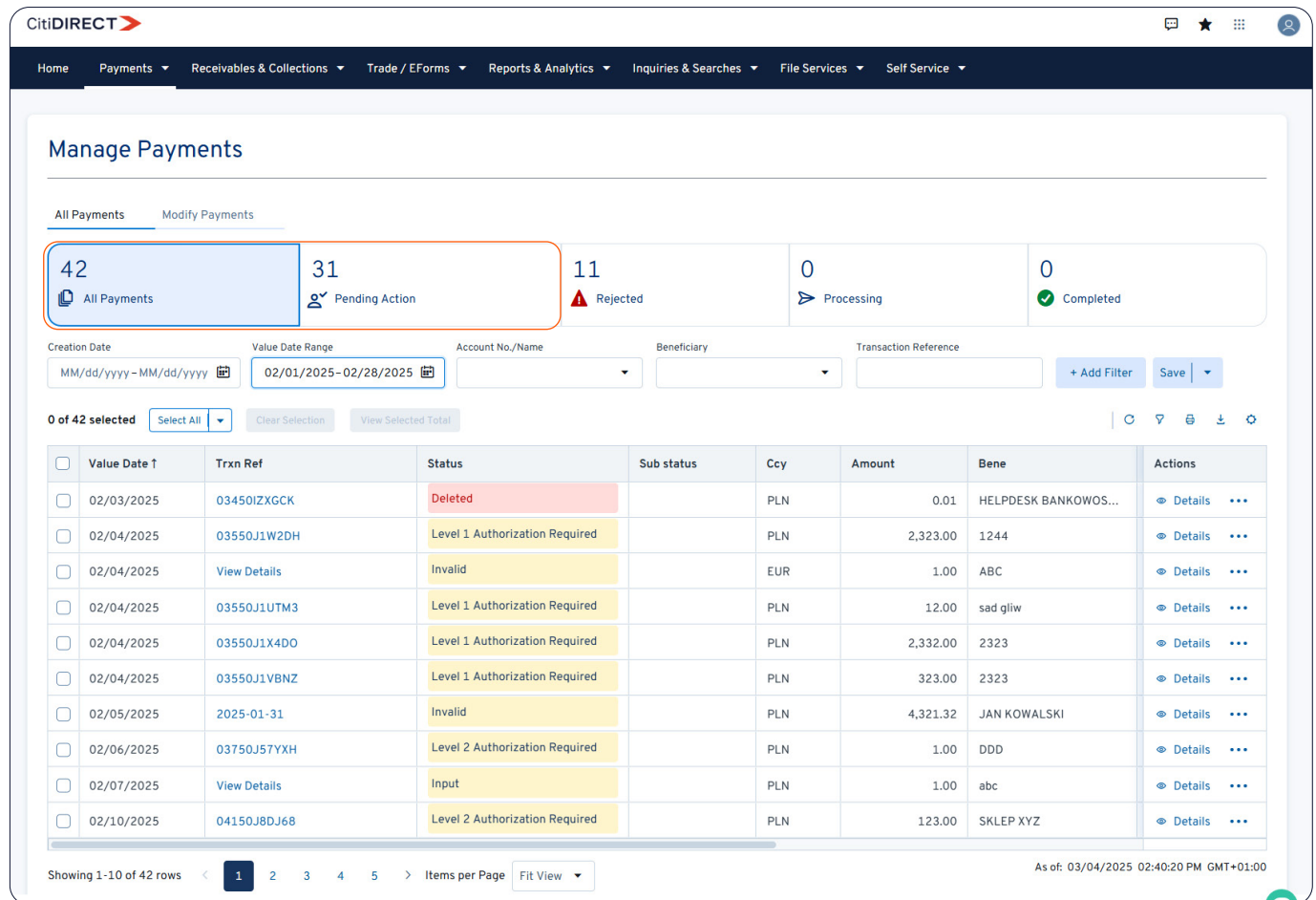

If this option is not visible to you, please contact your company's Security Manager for assistance in entitlements.

From the Manage Payments screen you will be able to see the "big picture" of your payments across status categories, view all payment details including end-to-end transaction lifecycle tracking information, download/print a proof of payment PDF, and more!

1. Summary Counts of Payments

Each card (All Payments, Awaiting Approval, etc.) provides a summary count of payments per logical category. Besides this, you can also quickly display each category's payments by clicking on each card as desired.

2. How to Use Payment Tracker

Click the Details icon or Actions in the Actions tab to view the payment transaction history and payment status information, including bank and billing system details, along with payment processing times.

Click All Payments and then Details to expand/collapse the details of each tracker step accordingly.
The step number in the green circle indicates the current payment stage.

3. How to Get a Proof of Payment PDF
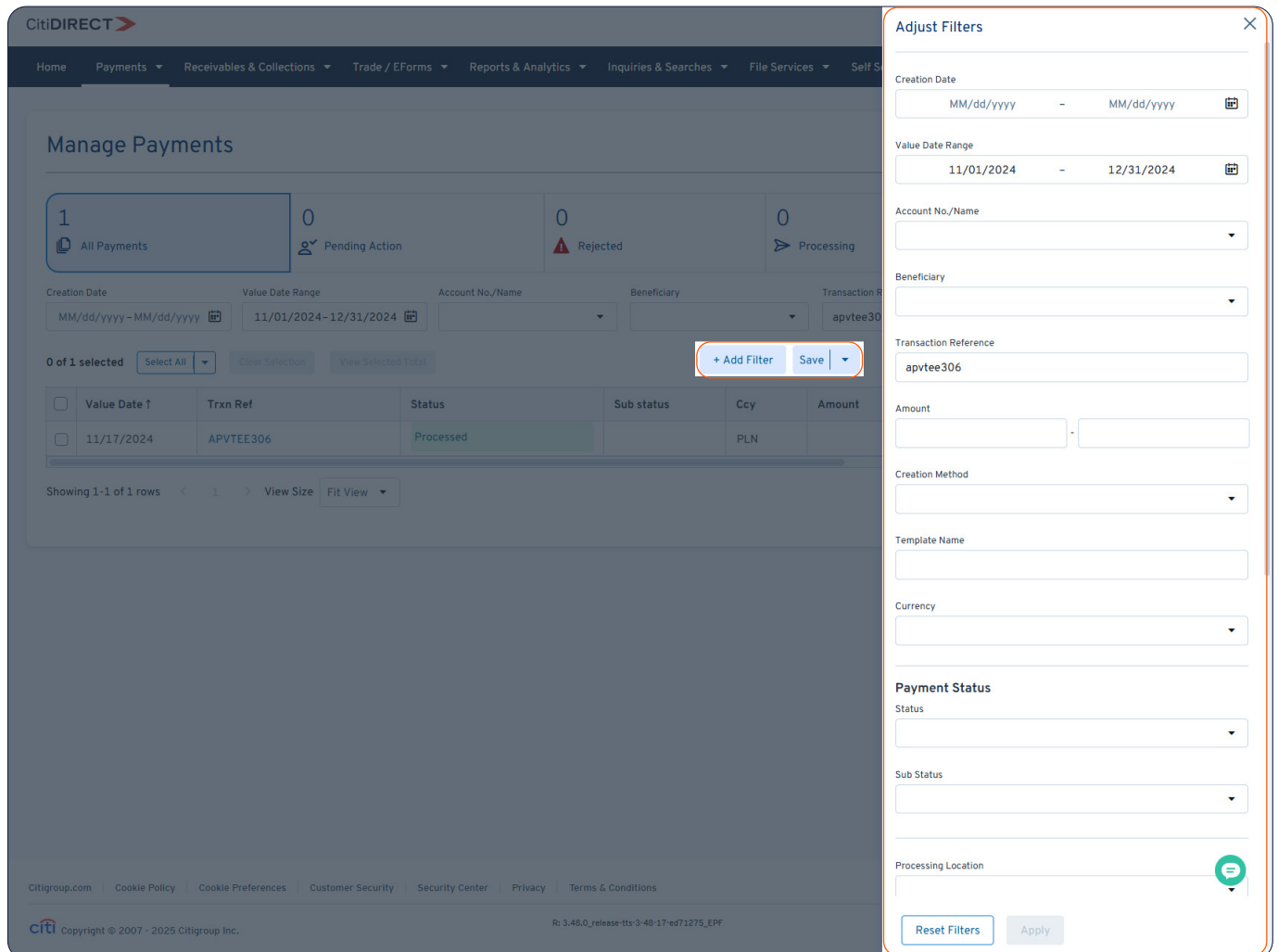
To download a transaction confirmation, simply click the three dots icon and then Proof of payment, which is located in the Actions column, and then download and/or print.

4. Additional Information

How to Find Specific Payments using Filters.

If you want to modify the system's default filter, you can add a new customized filter and save it for future use. As you may have various filtering needs to help you more easily and quickly find the payments you want, you can save multiple filters and set one of them as your default filter.

How to Customize your Manage Payments table (grid).

You can add or remove columns by clicking on the gear icon in the top right corner of the table.
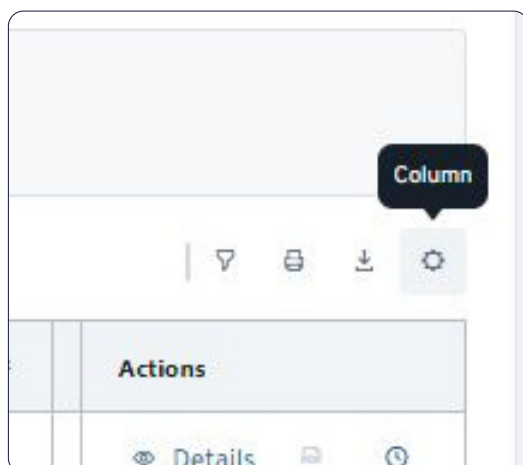
The data elements are logically categorized to help you find the ones you need faster.

To adjust the number of payments displayed per page, select Items per Page.
Fit View uses the scroll bar in the table rather than displaying payments page by page.

How to Print and Export your Manage Payments table.
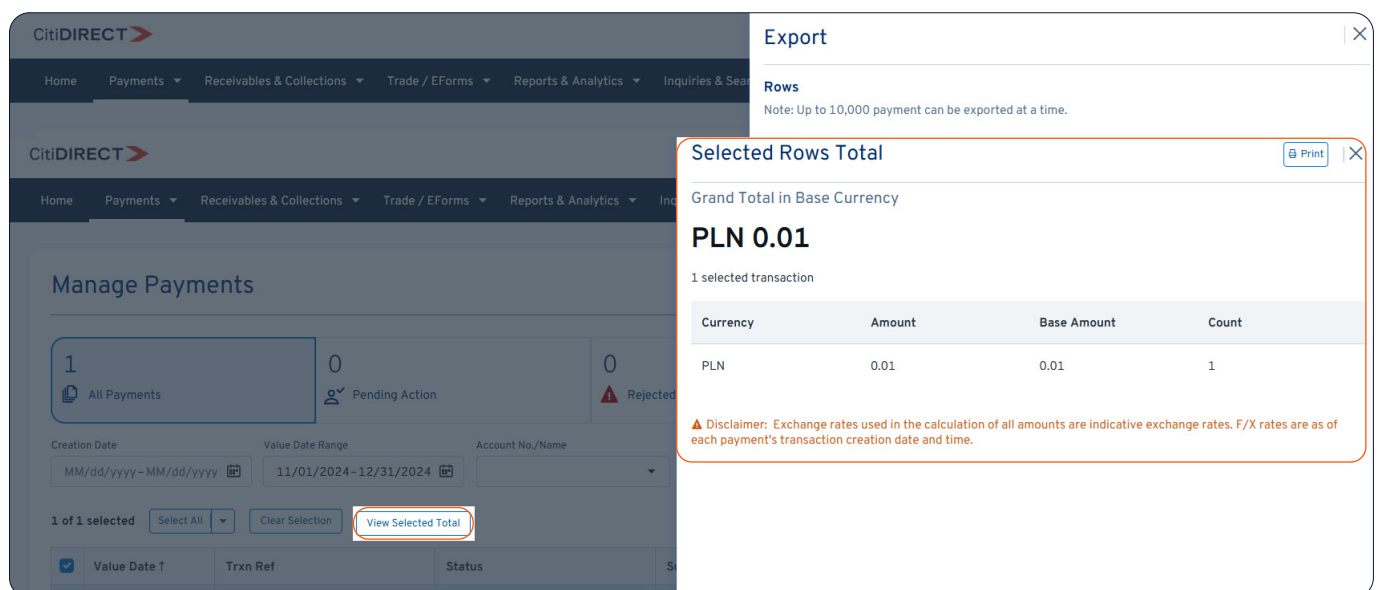
Click on the Print or Export icon to print or export payments from your Manage Payments table.

How to View Totals for Selected Payments.

Select View Selected Total to show the total for all selected payments (with option to Print the total details).

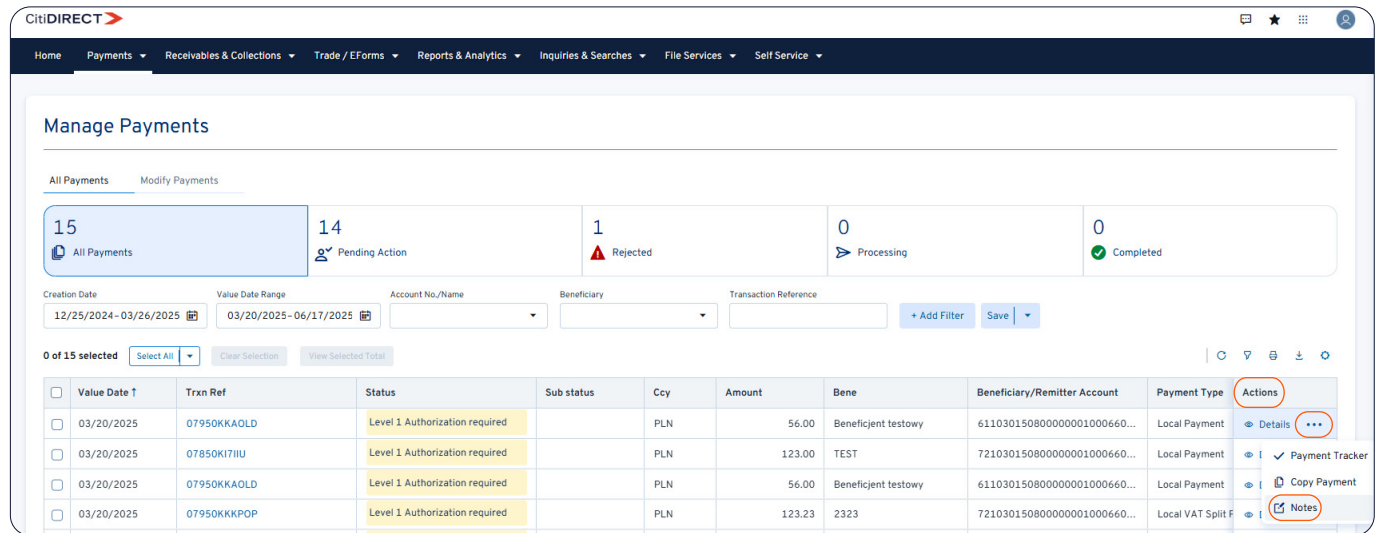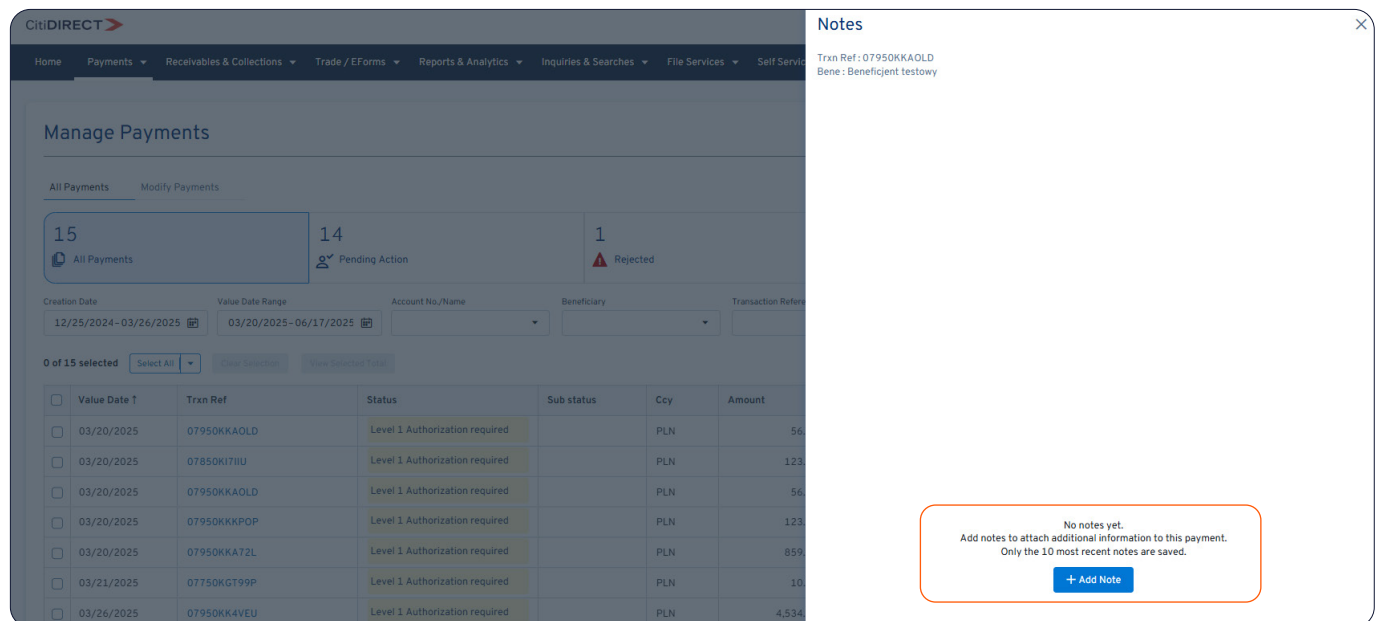## 5. Adding notes to payments

You can add a note to each payment. Click the three dots icon in the Actions column, then Notes.

After entering, it is possible to add a Note to the payment. The last 10 notes are saved.

For more information, please visit our Customer Knowledge Center >>