

Community Investment Trust (CIT) Documentation for Community Members

- My Accounts
- Dashboard
- Profile
- User
- Account
- Document
- Offering
- Investment
- Communication
- Dividend
- Transaction
- Billing
- Settings
- Proxy

Welcome to the documentation for the **Community** version of the **CIT App**. See below to get started.

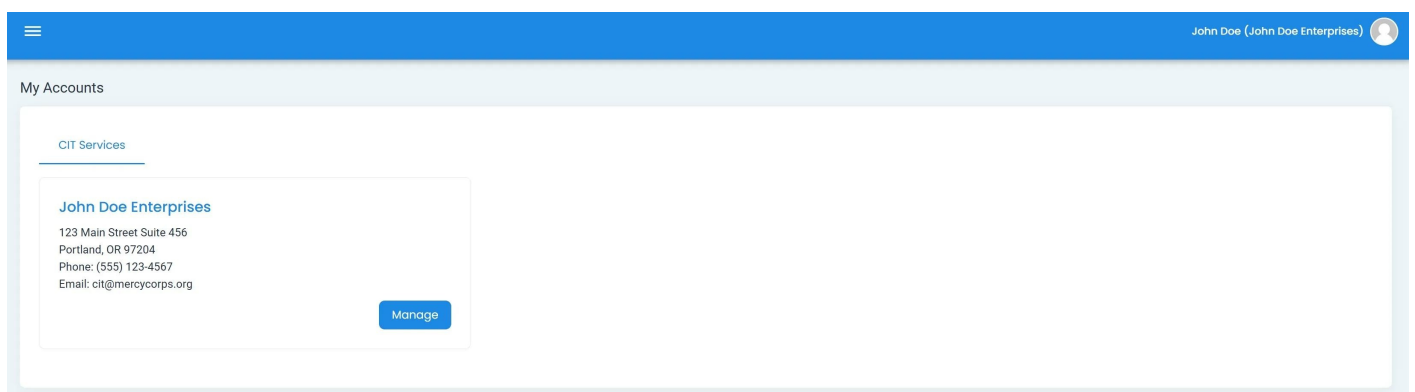
Download the PDF

[Download PDF](#)

[Download HTML as PDF](#)

My Accounts Category

The **CIT App** will always open up to the **My Accounts Page**



CIT App, My Accounts Screen, Homepage

The main feature of the **My Accounts Page** is that it allows you [Manage Different Accounts](#)

Note

You can navigate to the rest of the app through the **Primary Sidebar**.

For more on navigation and the primary sidebar, see [General Sidebar Navigation](#) page.

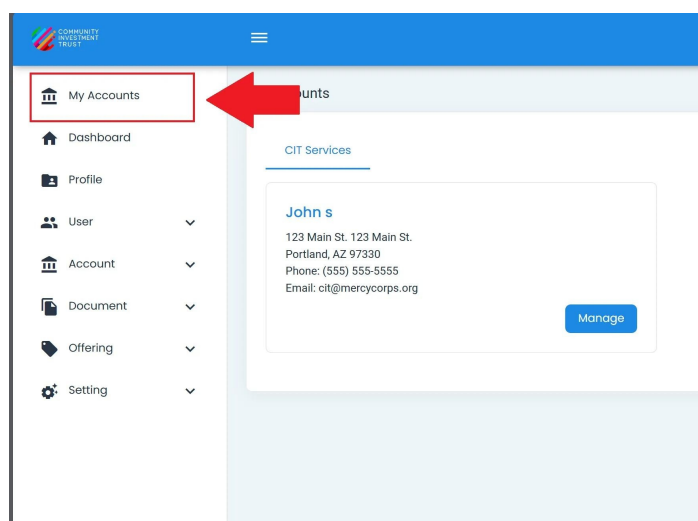
My Accounts

Managing Different Accounts

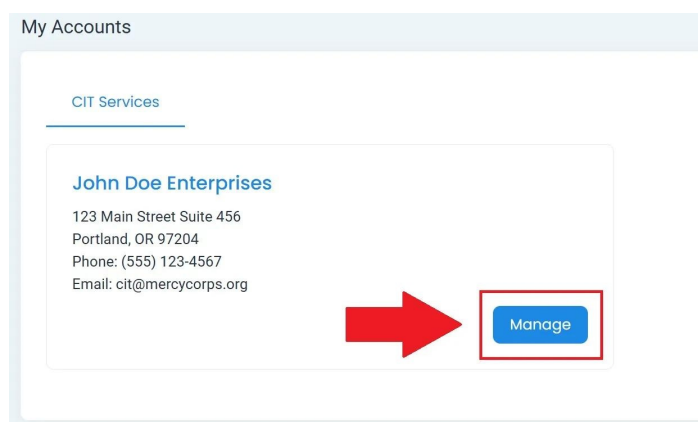
Managing accounts allows you to quickly navigate between the homepages of different accounts.

To **Manage an Account**:

1. Go to the **My Accounts** page.



2. Find the account you want to manage.
3. Select Manage next to the account name.




4. Ensure that the [Account Being Managed](#) matches the account that you selected.

Identifying the Current Account

Identify the current account you are using by looking for the account name next to your profile picture.



The account name is the name surrounded by parentheses

 **Account Name Example**

I.e., ({current account being managed}) .

It is:

- to the *right* of your login name.
- to the *left* of your profile picture.

Dashboard

Welcome to the **Dashboard** section. This area provides a high-level overview of various document types and their statuses, presented as interactive tiles.

Dashboard Tiles

Hover Over or Click a Tile to Explore Further

The tiles below offer quick access to detailed sections within the app. Hover over or click a tile to explore further.



138
Communities

Provides the number of **Sponsorship Organizations**.



42
CIT Corporations

Provides the number of **CIT Corporations**.



42

Pending CIT
Corporations
Onboarding

Provides the number of CIT Corporations that are going through the **Onboarding Process**.



Offering Year
2010

19 Pending CIT
Corporation Setups

Provides details for specific Offering Year with **Year filter set for 2010**.



Offering Year
2025

42 Pending CIT
Corporation Setups

Provides details for specific Offering Year with **Year filter set for 2025**.



Hillsboro CIT

2 Onboarding
Documents
Pending for
Approval

Provides number of **Onboarding Documents** pending for approval from a specific CIT Corporation.



East Portland
CIT (2025)

2 Offering
Documents
Pending for
Approval

Provides number of **Offering Documents** pending for approval from a specific CIT Corporation.



Clicking Tiles Will Cause Redirect

Clicking a card navigates you to the corresponding section, page, or example within the documentation.

Dashboard Tables

The **Dashboard** section contains two tables:

- [CIT Corporation Summary Table](#)
- [CIT Corporation Cashout Table](#)

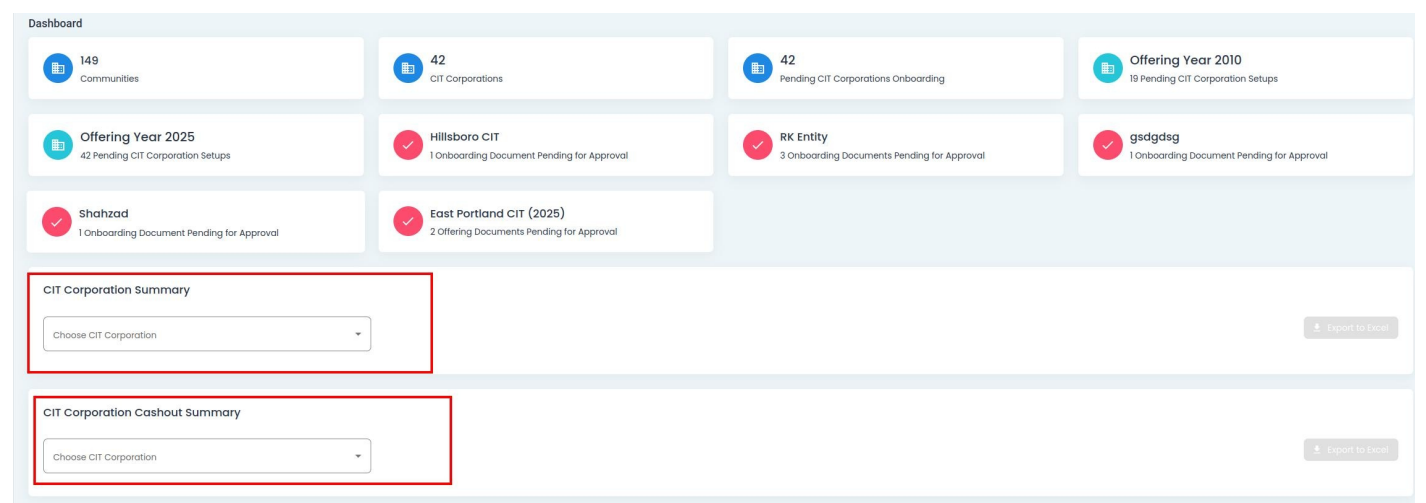
Table Features

For more information on the different features each tables has to offer, see:

- [CIT Corporation Summary Table](#)

Dashboard Table Locations

The general locations for each of these tables is located the bottom of the **Dashboard** section.



Dashboard, Main Tables

CIT Corporation Summary Table

The **CIT Corporation Summary** table provides an overview of the some of the most important information related to a **CIT Corporation**.

[Location: CIT Corporation Summary Table](#)
[Columns: CIT Corporation Summary Table](#)

[Location: CIT Corporation Summary Table](#)

The **CIT Corporation Summary** table is the second table on the [Dashboard](#).

149
Communities

42
CIT Corporations

42
Pending CIT Corporations Onboarding

Offering Year 2010
19 Pending CIT Corporation Setups

Offering Year 2025
42 Pending CIT Corporation Setups

Hillsboro CIT
1 Onboarding Document Pending for Approval

East Portland CIT (2025)
2 Offering Documents Pending for Approval

CIT Corporation Summary

Choose CIT Corporation

Export to Excel

CIT Corporation Cashout Summary

Choose CIT Corporation

Export to Excel

Dashboard, CIT Corporation Summary Table Location

Columns: CIT Corporation Summary Table

CIT Corporation Summary

Choose CIT Corporation
West Portland CIT

Export to Excel

Offering Year	Authorized Shares	Number of Shares Available for Sale	Number of New Shares Available for Sale	Total Current Investment Amount	Total Current Shares	Total Current Value of Investment	LC Limit	Total Original Cashout Amount	Total Cashout Shares
2024	45,000	0	0	\$0.00	0	\$0.00	\$0.00	\$0.00	0
2025	45,000	147.36	147.36	\$0.00	0	\$0.00	\$3,242.00	\$0.00	0
2025	45,000	160.21	160.21	\$0.00	0	\$0.00	\$3,422.00	\$0.00	0
2025	45,000	285.17	285.17	\$0.00	0	\$0.00	\$3,422.00	\$0.00	0

Over the course of all years
Total Investment Amount: \$0.00
Total Shares: 0

Dashboard, CIT Corporation Summary Table Columns Explained

The **CIT Corporation Summary** table contains the following columns:

- Offering Year** : The calendar year in which the Offering occurred.
- Authorized Shares** : The total number of shares authorized for issuance under the Offering.
- Number of Shares Available for Sale** : The total shares currently available for sale, including both new and existing (previously issued) shares.
- Number of New Shares Available for Sale** : The number of newly issued shares that have not yet been sold.
- Total Current Investment Amount** : The total amount currently invested in the Offering.
- Total Cashout Shares** : The total number of shares issued specifically for cashing out under the Offering.
- LC Limit** : The lowest price a stock can reach during a single trading session.
- Total Original Cashout Amount** : The total amount of shares that have been cashed out under the Offering.

- **Total Cashout Shares** : The total number of shares that have been cashed out under the Offering.

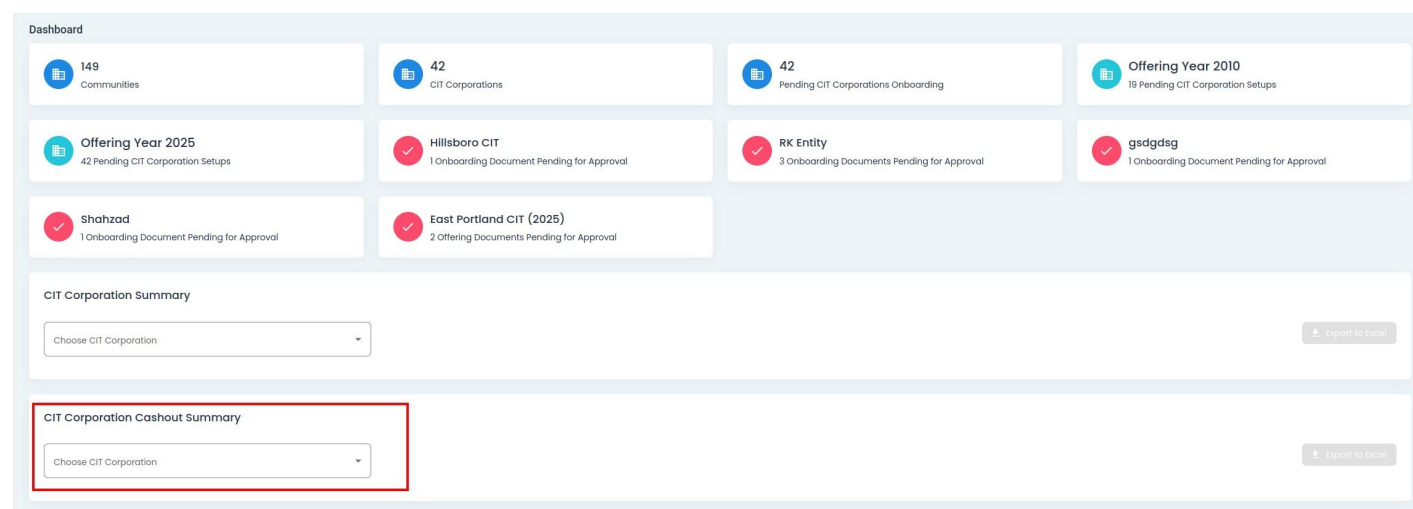
CIT Corporation Cashout Table

The **CIT Corporation Cashout** table provides an overview of the some of the most important information related to a **CIT Corporation** .

[Location: CIT Corporation Cashout Table](#)
[Columns: CIT Corporation Cashout Table](#)

Location: CIT Corporation Cashout Table

The **CIT Corporation Cashout** table is the first table on the [Dashboard](#):



Dashboard, CIT Corporation Cashout Table Location

Columns: CIT Corporation Cashout Table

CIT Corporation Cashout Summary							
Choose CIT Corporation							
East Portland CIT							
Export to Excel							
Offering Year	Number of Investors	Number of Investors Resubscribe	Reason Percentage	Number of Shares	Total Amount Cashed Out	Total Original Investment Amount	Total Amount of Appreciation
2025	2	1	Education 50%, Emergency 50%	8,361	\$128.56	\$35.00	\$93.56

Dashboard, CIT Corporation Cashout Table Columns Explained

The **CIT Corporation Cashout** table contains the following columns:

- **Offering Year** : The calendar year in which the Offering occurred.
- **Authorized Shares** : The total number of shares authorized for issuance under the Offering.
- **Number of Shares Available for Sale** : The total shares currently available for sale, including both new and existing (previously issued) shares.
- **Number of New Shares Available for Sale** : The number of newly issued shares that have not yet been sold.
- **Total Current Investment Amount** : The total amount currently invested in the Offering.
- **Total Cashout Shares** : The total number of shares issued specifically for cashing out under the Offering.

- **LC Limit** : The lowest price a stock can reach during a single trading session.
- **Total Original Cashout Amount** : The total amount of shares that have been cashed out under the Offering.
- **Total Cashout Shares** : The total number of shares that have been cashed out under the Offering.

CIT Corporation Summary (or Cashout) Table

Note

These instructions can also be used to help navigate the CIT Corporation Cashout Table.

See the **Table of Contents** for everything the **CIT Corporation Summary** table provides.

Table of Contents

- [How to Filter Table](#)
- [How to Export Table](#)

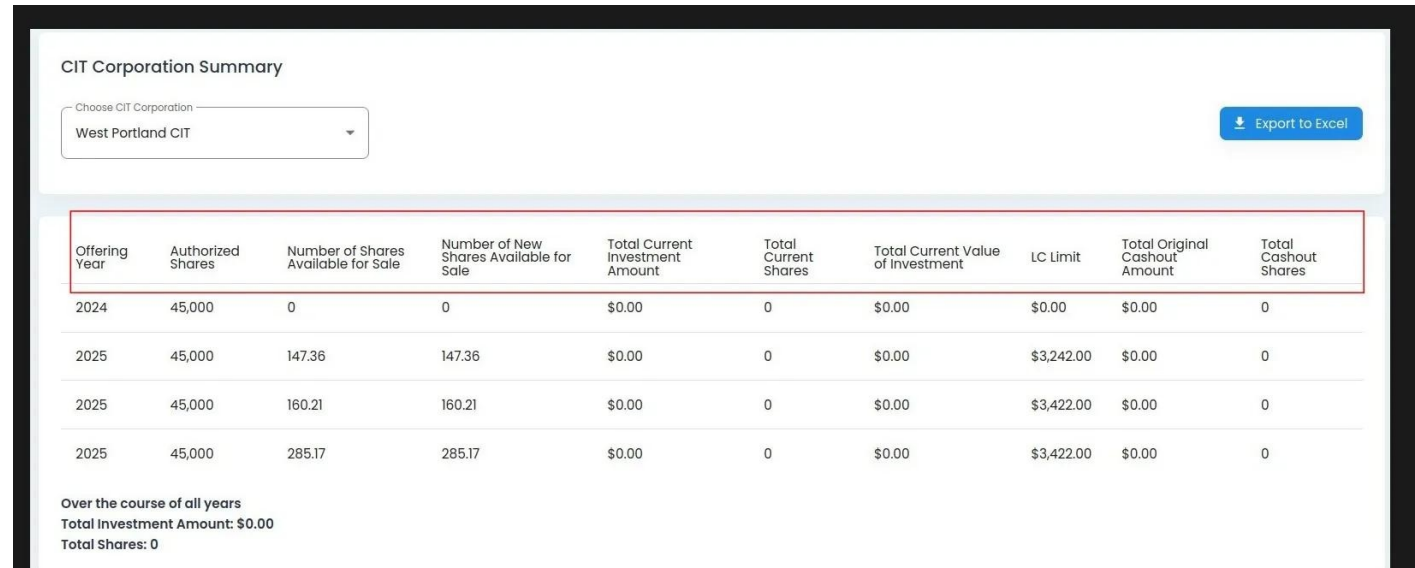
How to Filter Table

Step 1: Locate the CIT Corporation Summary Dropdown



Dashbaord, CIT Corporation Summary Section

Step 2: Click Dropdown and Select CIT Corporation



Dashboard, CIT Corporation Summary Dropdown Expanded

✔ Table Expands

The table will expand to show the CIT Corporation details.

CIT Corporation Summary

Choose CIT Corporation

East Portland CIT

Export to Excel

Offering Year	Authorized Shares	Number of Shares Available for Sale	Number of New Shares Available for Sale	Total Current Investment Amount	Total Current Shares	Total Current Value of Investment	LC Limit	Total Original Cashout Amount	Total Cashout Shares
2017-2018	45,000	0	0	\$25.00	2.5	\$0.00	\$0.00	\$0.00	0
2019	45,000	0	0	\$50.00	3.43	\$0.00	\$0.00	\$0.00	0
2020	45,000	0	0	\$100.00	6.31	\$0.00	\$0.00	\$0.00	0
2021	45,000	0	0	\$50.00	2.93	\$0.00	\$0.00	\$0.00	0
2022	45,000	0	0	\$350.00	20.53	\$0.00	\$0.00	\$0.00	0
2023	45,000	0	0	\$50.00	2.63	\$0.00	\$0.00	\$0.00	0

Dashboard, CIT Corporation Summary Table Expanded

How to Export Table

You can export the table as an  file once the table is filtered by **CIT Corporation**.

To do so:

Step 1: Find and Click the [Export to Excel](#) button

CIT Corporation Summary

Choose CIT Corporation


East Portland CIT

Export to Excel

Offering Year	Authorized Shares	Number of Shares Available for Sale	Number of New Shares Available for Sale	Total Current Investment Amount	Total Current Shares	Total Current Value of Investment	LC Limit	Total Original Cashout Amount	Total Cashout Shares
2017-2018	45,000	0	0	\$25.00	2.5	\$0.00	\$0.00	\$0.00	0
2019	45,000	0	0	\$50.00	3.43	\$0.00	\$0.00	\$0.00	0
2020	45,000	0	0	\$100.00	6.31	\$0.00	\$0.00	\$0.00	0
2021	45,000	0	0	\$50.00	2.93	\$0.00	\$0.00	\$0.00	0

Dashboard, CIT Corporation Summary Table Export Button Location

✔ Export File Successfully Downloaded

The  file will be downloaded to your default download location.

Profile


The  section covers everything listed in the **Table of Contents** below:



Table of Contents

[Profile Location](#)

[Profile Information](#)

[Upload Logo](#)


[Profile Location](#)

The  page is the third item listed in the  menu.

Don't see the Primary Sidenavavigation menu?



See [How to Toggle the Primary Sidenavavigation menu](#) for more information.

[Profile Information](#)

The  section allows you to modify your company details, it opens up to a form that is split into **three** sections:


- [Name and Contact Information](#)
- [Primary Address](#)
- [Mailing Address](#)

Note

-  items are *required* and cannot be left blank.
-  items are *optional*.

[Upload Logo](#)

To Upload:

1. Find the  section.

../_static/solo_app/Profile/upload-logo-section/upload-section-location.jpeg



Upload Logo Location

2. Click the [Upload Logo](#) button.
3. Select the logo (.png) file you want to upload.
4. File explorer dialog will open.

Name and Contact Information

The **Name and Contact Information** section allows you to modify company details related to legal name and contact information.

Location: Name and Contact Information section

The **Name and Contact Information** section is the first section of the Profile Information section. It's located at the top-left of the page:

Profile

Info

Name*
CIT Services

Website
www.investcit.org


Billing Email
fakeEmail@email.com

Company Email
info2@email.com

Phone Number
(555) 555-5555

Logo

Upload Logo



Primary Address

Street Name*
123 Main St.

Suite/Apt Number
123 Main St.

City*
Portland

State*
Arkansas

Zip Code*
97330

Mailing Address
(Street name is empty. Defaulting to primary address.)

Street Name
97330

Suite/Apt Number

City
Scottsdale

State
Wyoming

Zip Code
85251

Save Changes

Name and Contact Information Location

The following fields can be edited:

- Item Required: Name
- Website
- Billing Email
- Company Email
- Phone Number

Primary Address

The **Primary Address** subsection is where you can change the primary location of your company.

Profile

Info

Name*
CIT Services

Website
www.investcit.org


Billing Email
fakeEmail@email.com

Company Email
info2@email.com

Phone Number
(555) 555-5555

Logo

Upload Logo



Primary Address

Street Name*
123 Main St.

Suite/Apt Number
123 Main St.

City*
Portland

State*
Arkansas

Zip Code*
97330

Mailing Address
(Street name is empty. Defaulting to primary address.)

Street Name
97330

Suite/Apt Number

City
Scottsdale

State
Wyoming

Zip Code
85251

Save Changes

Primary Address Location

Note

This will be used as your **Billing Address**. It will be default as your Mailing Address unless otherwise specified.

You can edit the following information for the **Primary Address** section:

- Item Required: Street Name
- Suite/Apt Number
- Item Required: City
- Item Required: State
- Item Required: Zip Code

Mailing Address

The **Mailing Address** section allows you to update your company's mailing address if it's different from the primary address.

Location: Mailing Address section

The **Mailing Address** section can be found near the bottom of the **Profile** page.

Profile

Info

Name*

CIT Services

Website

www.investcit.org

Billing Email

fakeEmail@email.com

Company Email

info2@email.com

Phone Number

(555) 555-5555

Primary Address

Street Name*

123 Main St.

Suite/Apt Number

123 Main St.

City*

Portland

State*


Arkansas

Zip Code*

97330

Logo

Upload Logo



Mailing Address

(Street name is empty. Defaulting to primary address.)

Street Name

97330

Suite/Apt Number

City

Scottsdale

State

Wyoming

Zip Code

85251

Save Changes

Created October 2020

Modified Jol

Modified March 2021

Active

Jol

March 2021

Update

Jol

March 2021

Remove

Jol

March 2021

Update

Jol

March 2021

Update

Jol

March 2021

Update

Mailing Address Location

Note

- Leave **Street Name** empty if **Mailing Address** is the same as **Primary Address** .

You can edit the following information for the **Mailing Address** section:

- **Street Name**
- **Suite/Apt Number**
- **City**
- **State**
- **Zip Code**

User

The following **Sections** are included in the **User** category:

- [User Accounts](#)
- [Staff Accounts](#)

Users

The **Users** section covers everything listed in the **Table of Contents** below:

Table of Contents

[User List Homepage](#)

[Columns: User List Table](#)
[Search and Filter Options](#)
[Status Options](#)
[View User Details and Other Remaining Sections](#)

Hover for Page Preview

Hover over the links for a page preview.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:48 PM	Active	
Carl Padeyn	cpadeyn@transferonline.com	7	12/16/2024 @ 11:47 AM	Active	
John Doe	dieweey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	
John Service	ck@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	
Mohd Shasad	mohd.shasad@techahadcorp.com	288	01/06/2025 @ 05:19 AM	Active	
Pankaj CIT	pankaj.pshu@techahadcorp.com	0		Activation Pending	

Staff List Homepage

Features: Staff List Table

Filter by Status

View Staff Details and Other Remaining Sections

Staff Homepage #

Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

Hover for Page Preview

Click to show

User List Homepage

The section opens up to the table:

User List

Filter

Status

All

Search User Name/Email

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
AJ Sharma	AJ@yomail.com	1	10/31/2024 @ 07:51 AM	Active	
Alex Williams	alex.williams@tolinvestcit.com			Activation Pending	
Allison Anderson	allison.anderson@tolinvestcit.com			Activation Pending	
Amanda Castillo	amanda.castillo@tolinvestcit.com			Activation Pending	
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 05:46 AM	Active	
Arthur Murphy	arthur.murphy@tolinvestcit.com			Activation Pending	

Users, User list Table

Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

Columns: User List Table

User List

Filter

Status

All

Search User Name/Email

Q

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
AJ Sharma	AJ@yomail.com	1	10/31/2024 @ 07:51 AM	Active	
Alex Williams	alex.williams@tolinvestcit.com			Activation Pending	

User, User, Column Options

The **User List** table summarizes key details for each **User** that exists within the **CIT Corporation** , these details include the following:

- **Contact Name**
- **Contact Email**
- **Number of Visits**
- **Last Logged In**
- **Status** (**Active** or **Inactive**)
- **Action**

Search and Filter Options

The **User List** table can be filtered using two methods:

- **Search by User Name or Email:** Enter keywords into search field.
- **Filter by Status:** Select predefined status options from the dropdown menu.

Status Options

The **Status** dropdown includes five different options:

- **All** (Shows all users regardless of status)
- **Active**
- **Inactive**
- **Pending Activation**
- **Locked Out**

To Filter Users by Status:

1. Click the **Status** dropdown at the top of the user list.
2. Select your desired filter option.

User List

Filter

Status

All

All

Active

Pending Activation

Inactive

Locked Out

Search User Name/Email

	Number of Visits	Last Logged In	Status
	1	10/31/2024 @ 07:51 AM	Active
			Activation Pending
Allison Anderson	allison.anderson@tolinvestcit.com		Activation Pending
Amanda Castilla	amanda.castilla@tolinvestcit.com		Activation Pending

User, User Homepage, Status Filter Dropdown

- The table updates automatically to display matching users.

[View User Details and Other Remaining Sections](#)

The remaining sections are universally shared throughout the app.

These sections include:

- [View User Details: User Information Tab](#)
- [View User Details: Accounts Tab](#)
- [Overview of the Information pane](#)


Users Homepage Location

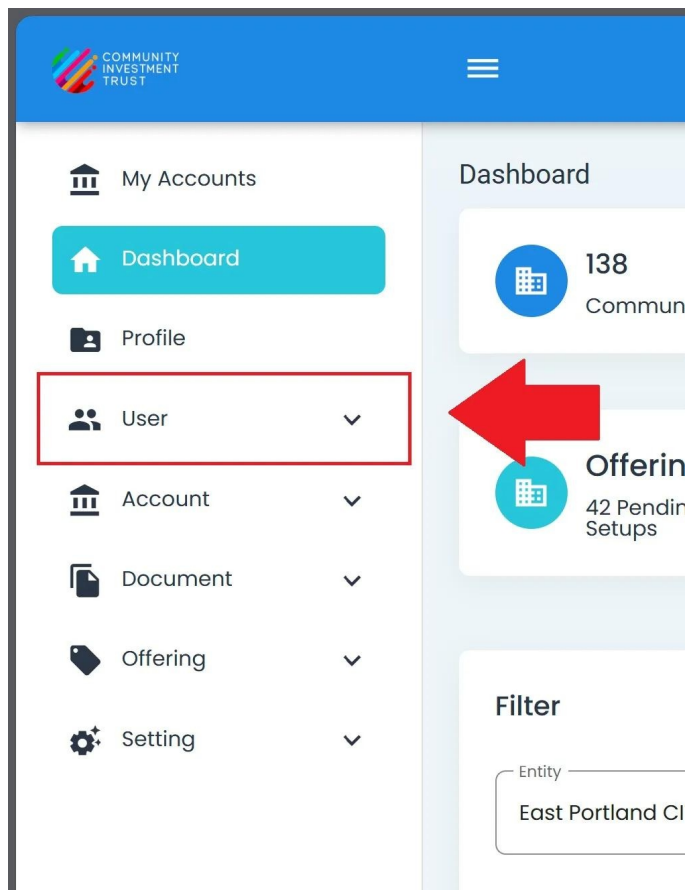
To Find the Staff List Homepage:

- Locate the primary sidenav to the left of the page.


Don't see the sidenav?

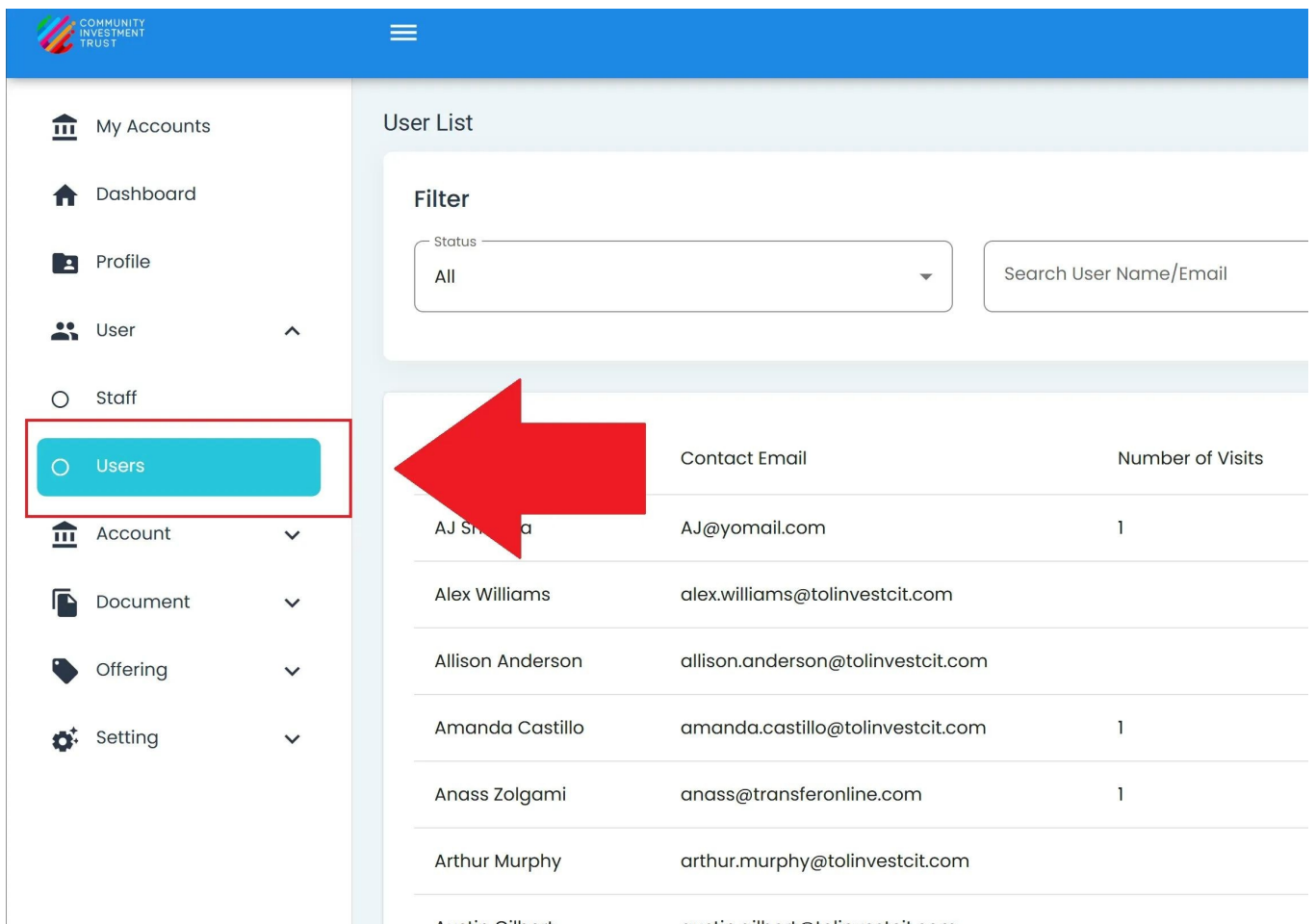
See [How to Toggle Primary Sidebar](#) for more information.

- Select the dropdown for the  **User** category.



User, Staff Primary Sidenav Location

3. Select  from the dropdown.



Staff


The  section covers everything listed in the **Table of Contents** below:

Table of Contents

[Staff List Homepage](#)



[Features: Staff List Table](#)

[Columns: Staff List Table](#)

[Filter by Status](#)



















[View Staff Details and Other Remaining Sections](#)

Staff List Homepage

The  section opens up to the  table:

Staff List

+ New Staff

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:46 PM	Active	  
Carl Padeyn	cpadeyn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	  
John Doe	dlevsey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	
John Service	cit@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	  
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	  
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:19 AM	Active	  
Pankaj CIT	pankaj.joshi@techaheadcorp.com	0		Activation Pending	  

Staff Homepage

Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

Hover for Page Preview

Hover over the links for a page preview.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgharni	anass@transferonline.com	1	10/30/2024 @ 12:48 PM	Active	View Edit Delete
Carl Podayn	cpodayn@transferonline.com	7	12/18/2024 @ 11:47 AM	Active	View Edit Delete
John Doe	dievsey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	View Edit Delete
John Service	ck@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	View Edit Delete
John Vio	jahn@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	View Edit Delete
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:18 AM	Active	View Edit Delete
Pankaj CIT	pankaj.joshi@techaheadcorp.com	0		Action Pending	View Edit Delete

Staff List Homepage

Features: Staff List Table

Filter by Status

View Staff Details and Other Remaining Sections

Staff Homepage #

Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

Hover for Page Preview Click to show

Features: Staff List Table

The table **Staff List** table includes important information about each **Staff** that exists within the **CIT Corporation** (see: [How to Identify the Current Account](#) section).

These details include details related to or including:

- Contact Information** , OR
- Status** .

Additionally, you can perform these actions directly from the table:



















- Three Actions** (i.e., [View User Details](#), [Edit User Details](#), and [Delete User](#))

Columns: Staff List Table

The **Columns** for the **Staff List** table can be found at the top of the table:

Staff List

+ New Staff

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:46 PM	Active	  
Carl Podeyn	cpodeyn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	  
John Doe	dlevsey@transferonline.com	51	01/06/2025 @ 09:11 AM	Active	
John Service	cit@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	  
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	  
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:19 AM	Active	  
Pankaj CIT	pankajjoshi@techaheadcorp.com	0		Activation Pending	  

Users, Staff Homepage, Columns

These **columns** include:

- Contact Name** - Name associated
- Contact Email** - Email address for the contact.
- Number of Visits** - Total times user accessed the system.
- Last Logged In** - Most recent date user logged in.
- Status** - Current
- Action** - Different actions that can be performed



















Filter by Status

The **status** column indicates the current status of the account.

Possible **Status** options include:

- All
- Active
- Pending Activation
- Inactive
- Locked Out

Staff List

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:46 PM	Active	  
Carl Podeyn	cpodeyn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	  
John Doe	dlevsey@transferonline.com	51	01/06/2025 @ 09:11 AM	Active	
John Service	cit@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	  
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	  
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:19 AM	Active	  
Pankaj CIT	pankajjoshi@techaheadcorp.com	0		Activation Pending	  

[View Staff Details and Other Remaining Sections](#)

The remaining sections are universally shared throughout the app.

These sections include:

- [View User Details - User Information Tab](#)
- [View User Details - Accounts Tab](#)
- [Overview of the Information pane](#)


Staff Homepage Location

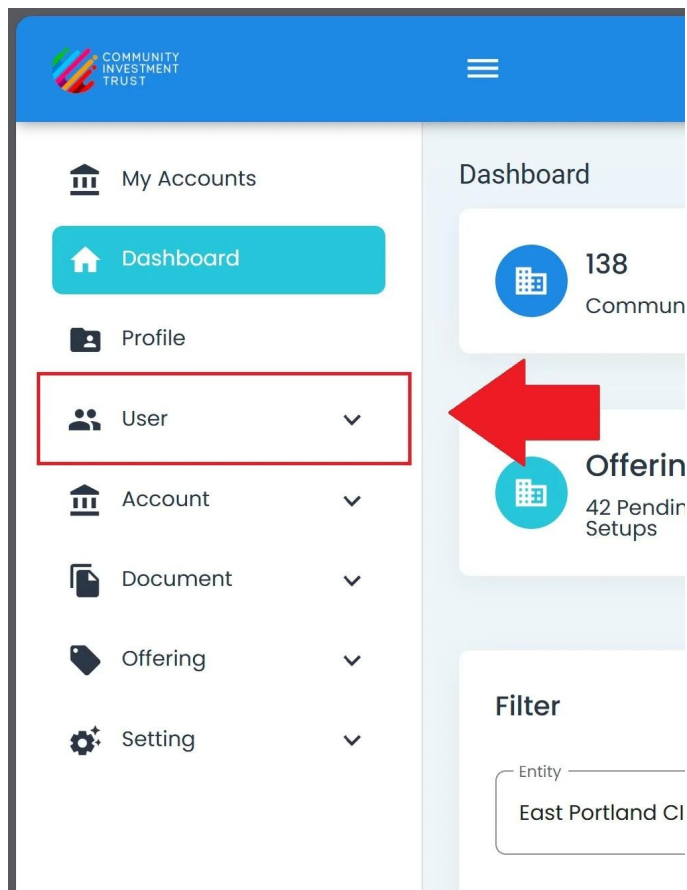
To Find the Staff List Homepage:

1. Locate the primary sidebar to the left of the page.


Don't see the sidebar?

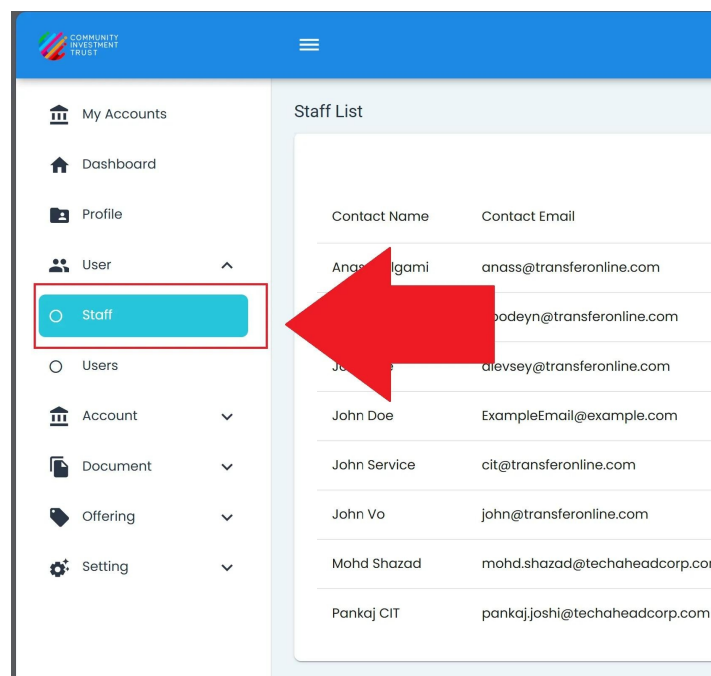
See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **User** category.



User, Staff Primary Sidenav Location

3. Select  from the dropdown.



Staff Homepage

Account

The following  are included in the  **Account** category:

- [CIT Corporations](#)
- [Investors](#)

CIT Corporations List

Table of Contents

[Features](#)

- [Location: CIT Corporations Section](#)

[CIT Corporations List Table](#)

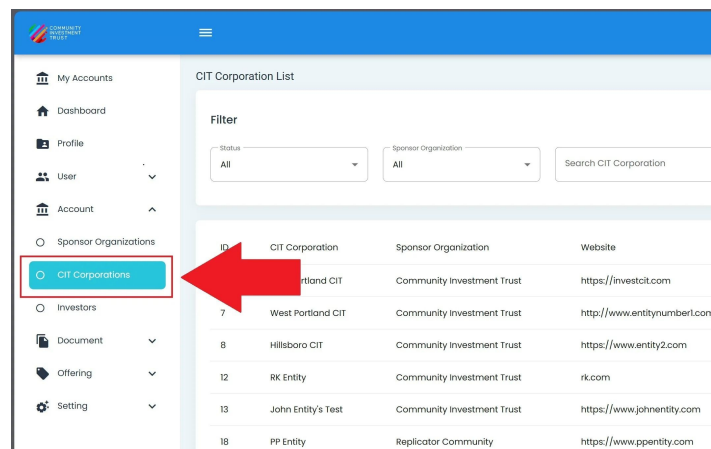
Features

The **CIT Corporations** section allows you to:

- [View Corporation Details](#)
- [Manage a CIT Corporations Legal Information](#)
- [Manage CIT Corporations Users](#)

Location: CIT Corporations Section





















You can find the **CIT Corporations** section underneath the **Account** category:



Account, CIT Corporations, Homepage, Primary Sidenav Location

CIT Corporations List Table

The **CIT Corporations** section opens up to **CIT Corporations List** table:

CIT Corporation List							
Filter							
Status	Sponsor Organization	Search CIT Corporation					
All	All						
ID	CIT Corporation	Sponsor Organization	Website	Email	Phone	Status	Action
4	East Portland CIT	Community Investment Trust	https://investcit.com	cit@mercycorps.org	(503) 896-5073	Active	 
7	West Portland CIT	Community Investment Trust	http://www.entitynumber1.com	entity1@transferonline.com	(503) 752-4444	Active	 
8	Hillsboro CIT	Community Investment Trust	https://www.entity2.com	john@transferonline.com	(503) 720-2853	Active	 
12	RK Entity	Community Investment Trust	rk.com	rkl@yopmail.com	(897) 929-9292	Active	 
13	John Entity	Community Investment Trust	https://www.johnentity.com	johnentity@tol.com	(343) 432-4242	Active	 
18	PP Entity	Replicator Community	https://www.ppentity.com	ppentity@yopmail.com	(777) 777-7777	Active	 
20	Shahzad	PT	https://www.shahzad.com	shahzad@yopmail.com	(777) 777-7777	Active	 
21	LL	PT	https://www.ll.com	ll@yopmail.com	(644) 343-4343	Active	 
22	BN	Community Investment Trust	https://www.bn.com	bn@yopmail.com	(666) 666-6666	Active	 
31	CIT corp	Community test			(533) 535-3535	Active	 
Items per page: 10 1 - 10 of 16							













CIT Corporations Section, Homepage, CIT Corporations List Table

Table: CIT Corporations List

The **CIT Corporations List** table provides a comprehensive overview of all **CIT Corporations** in the system.

Columns: CIT Corporations List Table

The **Columns** for the **CIT Corporations List** table can be found at the top of the table:

Sponsor Organization List							
Filter							
Status	Search Sponsor Organization						
All							
ID	Sponsor Organization	Number of CIT Corporations	Website	Email	Phone	Status	Action
3	Community Investment Trust	8	https://investcit.com	cit@mercycorps.org	(503) 896-5073	Active	 
11	Replicator Community	1	https://www.ReplicatorCommunity.com	ReplicatorCommunity@tol.com	(343) 434-3434	Active	 
14	PT	2	https://www.pt.com	pt@yopmail.com	(989) 123-2123	Active	 
15	RR	0	https://www.rr.com	rr@yopmail.com	(556) 543-4454	Active	 
16	KK	0	https://www.kk.com	kk@yopmail.com	(666) 666-6666	Active	 
17	NN	0	https://www.nn.com	nn@yopmail.com	555555555	Active	 

Account, Sponsorship Organizations, Homepage, Table Columns

These **Columns** include:

- ID** - Unique identifier for each organization
- CIT Corporation** - The name of the organization
- Sponsorship Organization** - The name of the sponsoring organization

- **Website** - Organization’s website URL
- **Email** - Primary contact email
- **Phone** - Contact phone number
- **Status** - Current status of the organization
- **Action** - Available actions for this organization

Available Actions

The **Action** column provides the following operations:

- [View CIT Corporation Details](#) - View [detailed information about the organization](#)
- [Manage Sponsor Organization](#) - Modify organization information

View CIT Corporation Details







This **View Account Detail** section for a **CIT Corporation** allows you to view and edit the following information:

- [CIT Corporation Information Tab](#)
- [Legal Information Tab](#)
- Cashout Price per Share
- [Users Tab](#)

How to Access Corporation Details

1. **SELECT** the [View Account Details](#) button for the corporation you want to view.

rch CIT Corporation

Website	Email	Phone	Status	Action
https://investcit.com	cit@mercy Corps.org	(503) 896-5073	Active	 
http://www.entitynumber1.com	entity1@transferonline.com	(503) 752-4444	Active	 
https://www.entitv2.com	iohn@transferonline.com	(503) 720-2853	Active	 

CIT Corporation, Homepage, View More Icon Location

✔ Action Will Take You to the Corporation Information Tab

See [CIT Corporation Information Tab](#) for more information.

Corporation Information Tab

The **CIT Corporation Information** tab provides a comprehensive overview of the **CIT Corporation**.

CIT Corporation Information

Legal Information

Users

Info

CIT Corp

Fake

Website

https://FakeCorp.com

Billing Email

Logo

Upload Logo



CIT Corporation, View Corporation, Corporation Information Tab Location

The **CIT Corporate Information** tab allows you to modify the following:

- **Item Required: CIT Corporation Name**
- **Website**
- **Billing Email**
- **Company Email**
- **Phone Number**

In addition, this tab allows you to modify information related to the Corporation's:

- **Item Required: Primary Address**,
- **Mailing Address**, or
- **Logo**,

See the Profile Section for More Information

See [Profile](#) section for information on how to edit fields and fill out billing and company information.

Upload Logo

Unique Logo Section for CIT Corporation Information Tab

This section is slightly different from the [Profile](#) section.

It allows for two options to be selected under the logo. The other sections do not.

The **Upload Logo** section allows you to upload a logo for your **CIT Corporation**. It can be found at the top-right of the page:

CIT Corporation: East Portland CIT

CIT Corporation Information Legal Information Cashout Price Per Share Users

Info

CIT Corporation Name*
East Portland CIT

Website
https://investcit.com

Billing Email
[Redacted]

Company Email
cit@mercyorg.org

Phone Number
(503) 896-5073

Primary Address

Street Name*
43 SW Naito Parkway

Suite/Apt Number
[Redacted]

City
Portland

State
Wyoming

Zip Code
97204

Mailing Address
(Street name is empty. Defaulting to primary address.)

Street Name
[Redacted]

Suite/Apt Number
[Redacted]

City
[Redacted]

State
[Select]

Zip Code
[Redacted]

Logo

Upload Logo

East Portland CIT
at SE 122nd and Market Street
Portland, US

Require Investor to Upload Proof of Address

Does the Proof of Address document need to be approved before allowing the investor to invest?

Save Changes

Sponsorship Organization, Upload Logo Location

Upload Logo Options

The **Upload Logo** section allows you to upload a logo for your **CIT Corporation**. It also allows you to select two **optional options**:

Logo

Upload Logo

East Portland CIT
at SE 122nd and Market Street
Portland, US

Require Investor to Upload Proof of Address

Does the Proof of Address document need to be approved before allowing the investor to invest?

Mailing Address
(Street name is empty. Defaulting to primary address.)

CIT Corporation, Upload Logo Location

- **Require Investor to Upload Proof of Address** - This option requires investors to upload proof of address before they can invest.

- **Does the Proof of Address document need to be approved before allowing the investor to invest?** - This option requires the address to be approved before allowing the investor to invest.

Other Tabs

You can also view and modify the following tabs:

- [Users Tab](#)
- [Legal Information Tab](#)

Legal Information Tab

The **Legal Information** tab is the second tab inside the [View Account Details](#) section.

CIT Corporation: East Portland CIT, In Sponsor Organization: Community Investment Trust

CIT Corporation Information **Legal Information** Users

Info	Company Contact
<div>Legal Name*</div> <div>East Portland CIT 2</div>	<div>Contact Name</div>
<div>EIN</div> <div>21-2121212</div>	<div>Contact Email</div>
<div>State Of Incorporation</div> <div>Arkansas</div>	<div>Contact Phone</div>
<div>State Of Operating</div> <div>Arizona</div>	<div>Accounting Contact</div>
<div>Date Formed</div> <div>11/27/2024</div>	<div>Firm Name</div>
<div>MM/DD/YYYY</div> <div>State Filing Number</div>	<div>Contact Name</div>
	<div>Contact Email</div>
<div>Address</div> <div>Street Name</div>	<div>Contact Phone</div>
<div>Suite/Apt Number</div>	<div>Legal Contact</div>
	<div>Contact Name</div>

CIT Corporation, Legal Information Tab

Information Available in the Legal Tab

The **Legal Information** tab allows you to view and the following information about a given **CIT Corporation** :

- **Item Required: Legal Name**
- **EIN**
- **State of Incorporation**
- **State of Operating**

- [Date Formed](#)
- [State Filing Number](#)

In addition, this tab allows you to view and edit a [CIT Corporation's](#) :

- [Address](#) ,
- [Company Contact](#) ,
- [Accounting Contact](#) , Or
- [Legal Contact](#) .

Editing Legal Information for CIT Corporations

1. Place cursor in the field you want to edit.
2. Input the desired information.
3. Click [Save Changes](#) at the bottom of the page.

Trying to Edit Other Company Information?

- See [Editing Company Information](#) to learn more about editing your company’s profile information.

Users Tab

The [Users](#) tab is a list of all users associated with the [CIT Corporation](#) .

CIT Corporation: East Portland CIT, In Sponsor Organization: Community Investment Trust

CIT Corporation Information

Legal Information

Users

+ New User

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Entity Admin	entity@transferonline.com	190	03/12/2025 @ 09:18 AM	Active	<div></div> <div></div> <div></div>

CIT Corporation, Users Tab Location

Navigating the Users Tab

The [Actions](#) column for the [Users](#) tab has the following actions available:

- [View User Details](#)
- [Edit Permissions](#)
- [Remove User Access](#)


Adding a New User to the CIT Corporation

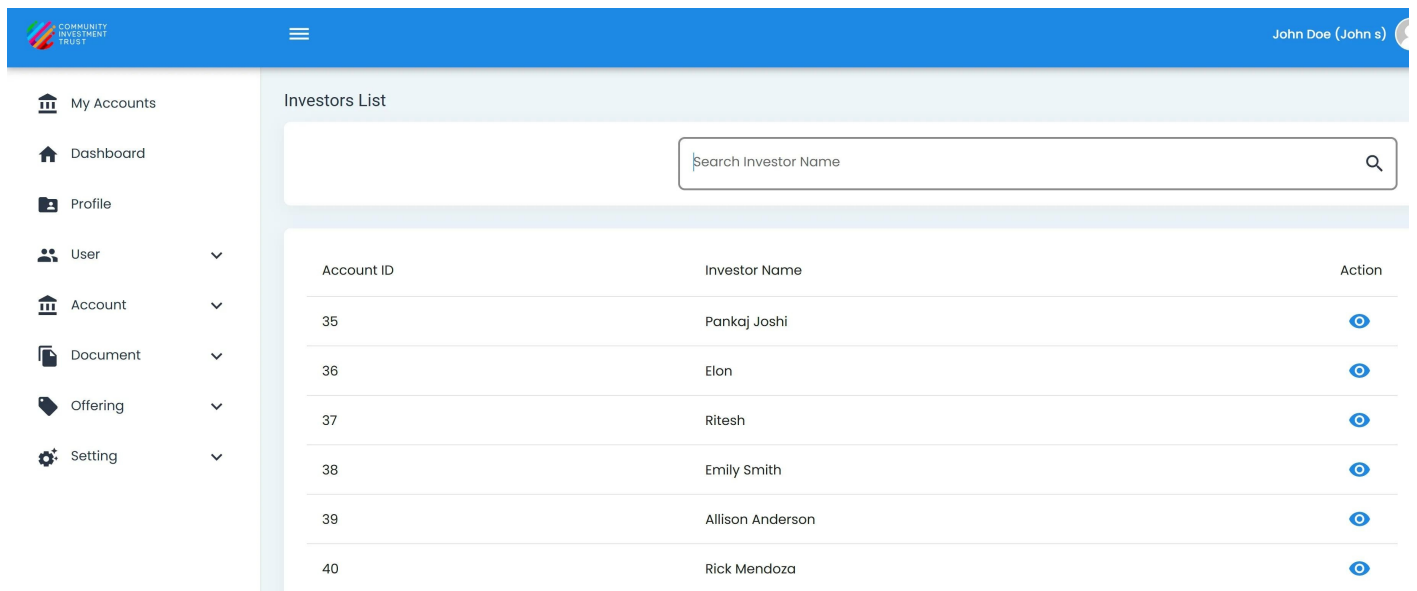
1. Follow the instructions in the [Adding a New User](#) section.

Permissions Options

- **Assessment Test**
 - View Assessment Test Results
- **Billing**
 - View Invoice
 - View Payment
- **Cashout**
 - Add/Edit Cashout Questions
 - Approve/Deny Cashout Requests
 - Edit Cashout Price Per Share
 - View Cashout
- **Community**
 - Edit Community Profile
- **Demographic**
 - Add/Edit Demographic Questions
 - Add/Edit Renew Demographic Questions
- **Document**
 - Upload Entity Offering Document
 - Upload Entity Onboarding Document
 - View Entity Offering Document
 - View Entity Onboarding Document
- **Entity**
 - Add/Edit Entity
- **Investor/Shareholder**
 - Add/Edit Investor
 - View Investor
- **Offering**
 - Add/Edit Offering
- **Report**
 - Run Shareholder List Report
- **User**
 - Edit/Add Community Staff
 - Edit/Add User
 - View Users

Investors

The  **Investors List** section provides a comprehensive view of all investors in the system.



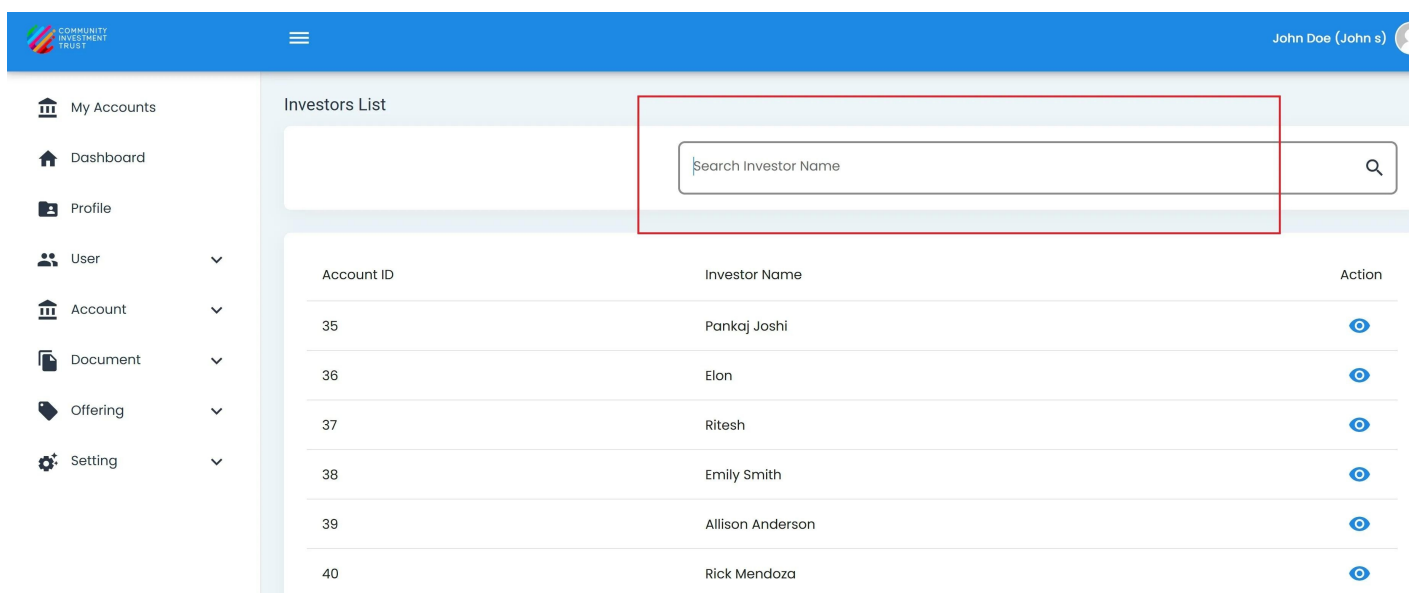
Investors List Homepage

Overview

The **Investors List** displays all registered investors and provides tools to search, view, and manage investor records.

Search Functionality

You can search for specific investors using the search bar at the top of the page:



Investors List, Search Bar Location

Investors Table

The **Investors Table** displays key information about each investor in the system:

COMMUNITY INVESTMENT TRUST

John Doe (John s)

My Accounts

Dashboard

Profile

User

Account

Document

Offering

Setting

Investors List

Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Investors List, Table Column Names

Table Columns

The **Investors Table** contains the following columns:

- Account ID** - Unique identifier for each investor account
- Investor Name** - Full name of the investor
- Action** - Available actions for the investor record

Action Column

The **Action** column allows you to perform operations on individual investor records:

COMMUNITY INVESTMENT TRUST

John Doe (John s)

My Accounts

Dashboard

Profile

User

Account

Document

Offering

Setting

Investors List

Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Investors List, Action Column Location

Available Actions

The **Action** column includes the following operations:

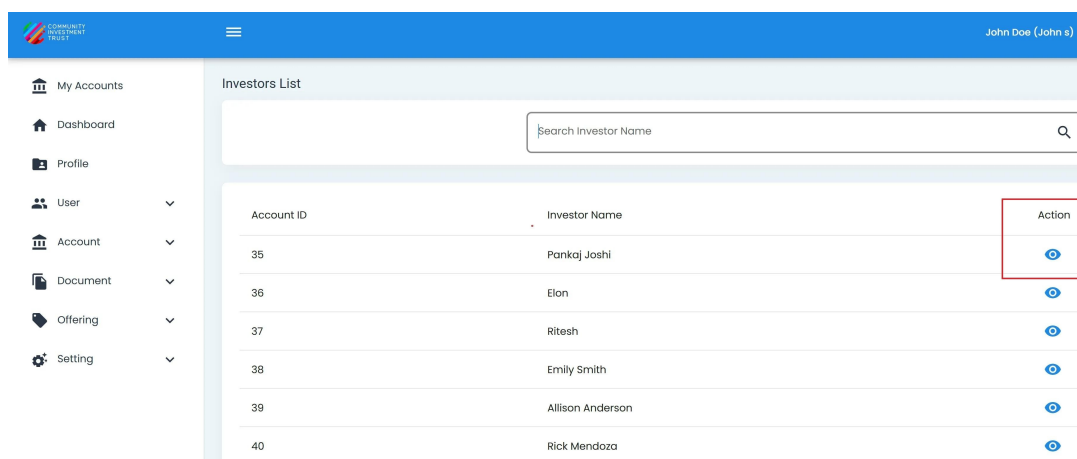
- [View More Details](#) - View and edit detailed information about the Investor

View Investor Details

The [View Investor Details](#) action allows you to access detailed information about an investor.

How to View Investor Details

1. In the [Investors Table](#), locate the investor whose details you want to view.
2. Click the [View Investor Details](#) icon located in the [Action](#) column for that investor.



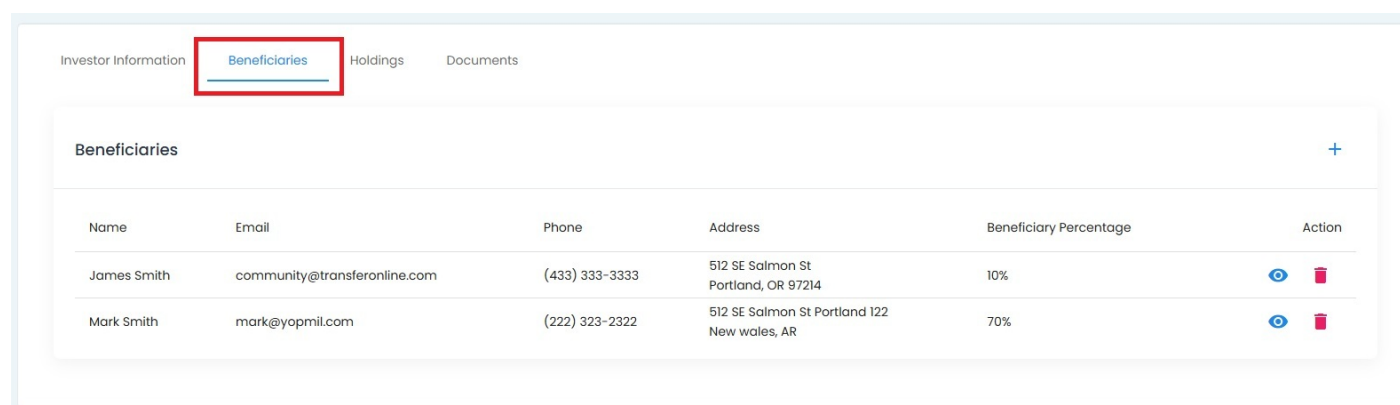
Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Investors List, View Action Location

3. The system will navigate to the investor's detailed information page.

Beneficiaries Tab

The [Beneficiaries](#) tab allows you to view and manage all beneficiaries associated with an investor.



Name	Email	Phone	Address	Beneficiary Percentage	Action
James Smith	community@transferonline.com	(433) 333-3333	512 SE Salmon St Portland, OR 97214	10%	
Mark Smith	mark@yopmil.com	(222) 323-2322	512 SE Salmon St Portland 122 New wales, AR	70%	

Investor Details, Beneficiaries Tab Location

Beneficiaries Tab Overview

The [Beneficiaries](#) tab displays a list of all beneficiaries linked to the investor, including their contact information and allocation percentages.

Investor Information

Beneficiaries

Holdings

Documents

Beneficiaries

Investor Details, Beneficiaries Tab View

Beneficiary Table

The **Beneficiaries Table** contains the following columns:

- Name** - Beneficiary's full name
- Email** - Beneficiary's email address
- Phone** - Beneficiary's contact number
- Address** - Beneficiary's mailing address
- Beneficiary Percentage** - Allocation percentage for the beneficiary
- Action** - Available actions for the beneficiary

Available Actions

The **Action** column allows you to:

- [View Beneficiary Details](#) - View detailed information about the beneficiary
- [Delete Beneficiary](#) - Remove the beneficiary from the investor's account





How to Add a New Beneficiary

See Add New Beneficiary for more information.

Adding a New Beneficiary

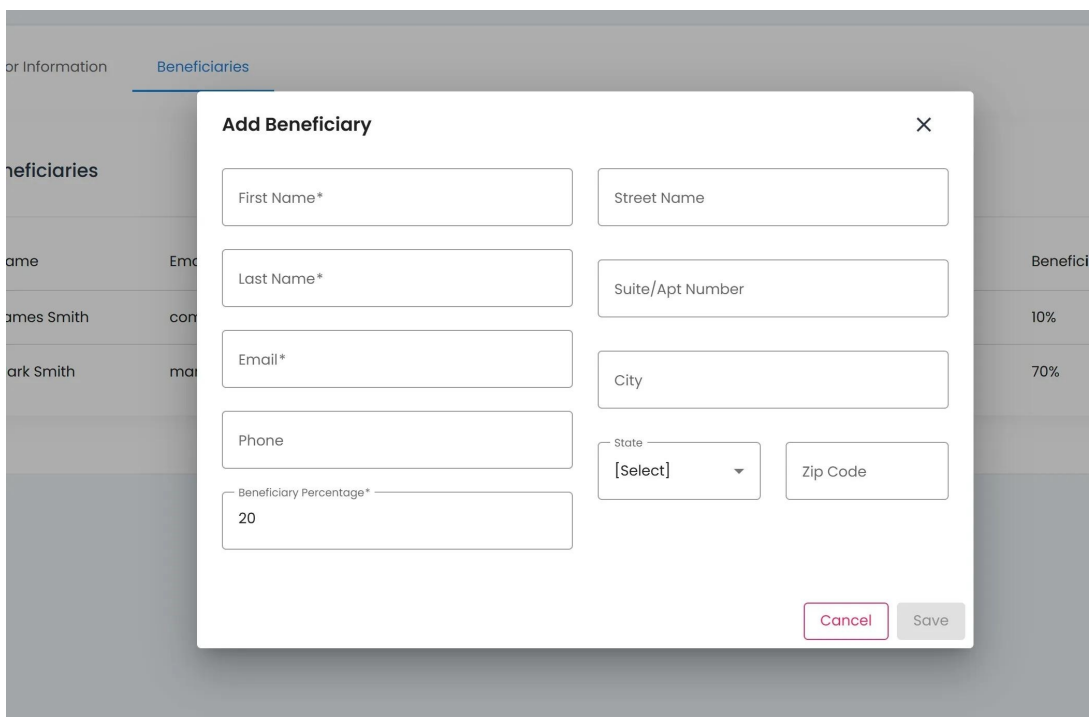
To add a new beneficiary to the investor's account:

- Click the plus icon [+] at the top right of the **Beneficiaries Table**.

Beneficiaries				
Email	Phone	Address	Beneficiary Percentage	Action
community@transferonline.com	4333333333	512 SE Salmon St Portland, OR 97214	10%	 
mark@yopmil.com	2223232322	512 SE Salmon St Portland 122 New wales, AR	70%	 

Investor Details, Add Beneficiary Button Location

- The Add Beneficiary popup will appear.



Add Beneficiary Popup

- Place cursor in desired field.
- Fill in relevant information.

Possible fields include:

- Item Required: First Name (required)
- Item Required: Last Name (required)
- Item Required: Email (required)
- Phone (optional)
- Item Required: Beneficiary Percentage (required)
- Address information (optional)

- Fill in necessary information, which can include the following
- Click the [Save](#) button to add the beneficiary.

Note

The total allocation percentage across all beneficiaries must add up to 100%.

Investor Details Tab

The **Investor Details** tab provides comprehensive information about the selected investor, including personal information, contact details, and investment preferences.

Contents

Investor Details Tab

Location: Investor Details Tab

Investor Information Section

- Available Information
 - Personal Information

Primary and Mailing Address

Location: Investor Details Tab

The **Investor Details** tab will be the second tab that appears when [Viewing Investor Information](#).

Investor: Pankaj Joshi

Investor Information

Beneficiaries

Investor Info

Name*

Pankaj Joshi

SSN

222-22-2222

Date Of Birth

9/29/1994

Primary Address

Street Name*

1007 Rosewood Lane

Suite/Apt Number

City*

New York

State*

New York

Zip Code*

10007

Mailing Address

(Street name is empty. Defaulting to primary address.)

Street Name

Suite/Apt Number

City

State

[Select]

Zip Code

Investor Details Tab Location

Note

- Item Required: Red** items are *required* and cannot be left blank.
- Blue** items are *optional*.

Investor Information Section

The **Investor Information** section allows you to edit the investor’s personal information. It’s split into three distinct sections:

- **Item Required: Investor Info**
- **Item Required: Primary Address**
- **Mailing Address**

Investor Information

Beneficiaries

Investor Info

Name*

Pankaj Joshi

SSN

222-22-2222

Date Of Birth

9/29/1994

Investor Information Section

Available Information

The Investor Details tab displays the following information categories:

Personal Information

The **Personal Information** displays:

- Full Legal Name
- Date of Birth
- Social Security Number/Tax ID

Primary and Mailing Address

See Primary and Mailing Address section for details.

To Edit an Investor’s Details:

1. Place your cursor in the field you want to edit.

Note

This section does not require you to click the **Edit** button.

2. Type the changes you want to make.
3. Click the [Save Changes](#) button at the bottom-right of the page.

Code*
204

Mailing Address

(Street name is empty. Defaulting to primary address.)

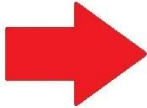
Street Name

Suite/Apt Number

City

State
[Select]

Zip Code





Save Changes

Investor Details Save Changes

Note

Some investor information may require additional verification before changes take effect.

Holdings List Tab


The  tab provides a quick overview of all holdings associated with a chosen .

Contents

Holdings List Tab

- Location: Holdings Tab
- Columns: Holdings List Table
- Relevant Sections

Location: Holdings Tab

The  tab will be the third tab that appears when Viewing Investor Information.

Investor Information
Beneficiaries
Holdings
Documents

Offering Documents

Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date
No documents					

Items per page: 10

Account, Investors, Investor Information, Holdings Tab

Columns: Holdings List Table

The **Holdings** table will have the following columns:

- Book Number** : A unique identifier associated with a specific investment certificate or holding record, used for tracking and reference.
- Investment Amount** : The monetary value invested in the holding, representing the total cost or contribution made by the investor.
- Shares** : The number of stock units associated with the investment, representing ownership in the issuing company.
- Issued Date** : The date the shares or investment certificate were issued, marking the official start of the holding.
- Canceled Date** : The date the holding or certificate was canceled or invalidated, often due to redemption, conversion, or transfer.

Investor Information
Beneficiaries
Holdings
Documents

Holdings List

Filter

Status
Outstanding

Book Number ↑	Investment Amount	Shares	Issued Date	Canceled Date
No Book Certificates				

Items per page: 10 0 of 0 < >

Account, Investors, Investor Information, Holdings Tab, Columns Explained

Relevant Sections

- See [Filter Holdings by Status](#) for more information on how to filter holdings by status.

Filter Holdings by Status

You can filter the **Holdings List** table by **Status**.

To Filter Holdings by Status:

- Find the **Status** column.

Columns: Documents List Table

The **Documents** table will have the following columns:

- Book Number** : A unique identifier associated with a specific investment certificate or holding record, used for tracking and reference.
- Document Type** : The type of document, such as a certificate, letter, or other document.
- Shares** : The number of stock units associated with the investment, representing ownership in the issuing company.
- Issued Date** : The date the shares or investment certificate were issued, marking the official start of the holding.
- Canceled Date** : The date the holding or certificate was canceled or invalidated, often due to redemption, conversion, or transfer.

Offering Documents

Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
No documents						

Items per page: 100 of 0

Account, Investors, Investor Information, Documents Tab, Columns Explained

Search for Documents

1. Place cursor in search field.

Offering Documents

Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Dat
No documents					

Account, Investors, Investor Information, Documents Tab, Search Location

2. Start typing the name of the **File Name** you want to search for.

Investor Information

Beneficiaries

Holdings

Documents

Investor info

Name*

DOB

Date Of Birth*

Email*

Phone

Primary Address

Street Name

Portland St.

Suite/Apt Number

City*

Portland

State*

Oregon

Zip Code*

97238

Mailing Address

(Street name is empty. Defaulting to primary address.)

Street Name

Suite/Apt Number

City

State

Zip Code

Other Actions

The **Action** column for the **Documents** table is the furthest **column** to the right:

Investor Information

Beneficiaries

Holdings

Documents

Offering Documents

East-CIT

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
23	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/22/2025	<div><div></div><div></div></div>
22	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/22/2025	<div><div></div><div></div></div>
21	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/22/2025	<div><div></div><div></div></div>

Items per page: 10 1 - 3 of 3

Account, Investors, Investor Information, Documents Tab, Action Column Location

Available Actions

The **Action** column allows you to perform the following actions:

- [View Document Details](#) - Opens the document in a browser window.
- [Download Document](#) - Downloads document to the **User's** default downloads folder.

Document

This following **Sections** are included in the **Document** category:

1. [CIT Corporation Onboarding Documents](#)
2. [CIT Corporation Offering Documents](#)

CIT Corporation Onboarding Documents

Table of Contents

[Features: CIT Corporation Onboarding](#)

[Location: CIT Corporation Onboarding](#)

[Table: Onboarding Documents List](#)

[Onboarding Documents Table](#)

Features: CIT Corporation Onboarding

The **CIT Corp Onboarding** section helps you track each user's onboarding progress to CIT Corporation.

The **CIT Corp Onboarding** section allows you to:

- [Quickly view important information about each CIT Corporation](#)
- [Access in-depth company details](#)
- [Approve or reject onboarding documents](#)


Note

See [Approve or reject onboarding documents](#) for more information.

- [Filter by Onboarding Status](#) (i.e., All , Pending , OR Completed)
- [View document completion status](#)

Location: CIT Corporation Onboarding

The Corporation Onboarding section can be found under the Document category.



My Accounts

Dashboard

Profile

User

Account

Document

CIT Corp. Onboarding

CIT Corp. Offering

Investor Documents

Offering

Setting

CIT Corporation Onboarding Documents

Status

All

ID	Sponsor Organization
4	Community Investment Trust
	Community Investment Trust
	Community Investment Trust
12	Community Investment Trust
13	Community Investment Trust
18	Replicator Community
20	PT

CIT Corporation Onboarding, Location

Table: Onboarding Documents List

The **Corp Onboarding** section opens up to the **Onboarding Documents** table:

CIT Corporation Onboarding Documents

Status

All

Search CIT Corporation

ID	Sponsor Organization	CIT Corporation	Document Complete	Pending For Approval	New Message	Status	Action
4	Community Investment Trust	East Portland CIT	3 of 4	0	0	Pending	
7	Community Investment Trust	West Portland CIT	3 of 4	0	0	Pending	
8	Community Investment Trust	Hillsboro CIT	0 of 4	2	0	Pending	
12	Community Investment Trust	RK Entity	0 of 4	0	0	Pending	
13	Community Investment Trust	John Entity's Test	0 of 4	0	0	Pending	
18	Replicator Community	PP Entity	0 of 4	0	0	Pending	
20	PT	Shahzad	0 of 4	0	0	Pending	
--	--	--	--	--	--		

CIT Corporation Onboarding Section, Homepage, Onboarding Documents Table

The **Onboarding Documents Table** provides a brief, but detailed, overview of where each CIT Corporation is at in the onboarding process.

CIT Onboarding Documents Table: Columns Explained

CIT Corporation Onboarding Documents

Status

All

Search CIT Corporation

ID	Sponsor Organization	CIT Corporation	Document Complete	Pending For Approval	New Message	Status	Action
4	Community Investment Trust	East Portland CIT	3 of 4	0	0	Pending	
7	Community Investment Trust	West Portland CIT	3 of 4	0	0	Pending	
8	Community Investment Trust	Hillsboro CIT	0 of 4	2	0	Pending	

There are 8 columns in the **Onboarding Documents Table** table:

- ID** column - The **ID** associated with the process itself.

Note

This **ID** can be used for {insert significance of **ID**}

- Sponsorship Organization** column - The **Sponsorship Organization** that is sponsoring the onboarding process.
- CIT Corporation** column - The **CIT Corporation** that is being onboarded.
- Document Complete** column - Shows the number of onboarding documents a corporation has completed.
- Pending For Approval** column - Number of documents that have been submitted but are pending approval.
- New Message** column - Will show the number of new messages regarding the onboarding process.

- **Status** column - Status of where the corporation is at on the Offering process (i.e., [All](#), [Pending](#), [Complete](#))
- **Action** column
 - [View More Details](#): Action to view more details about the documents and where they are at on the onboarding process for the selected CIT Corporation.

Column Sorting

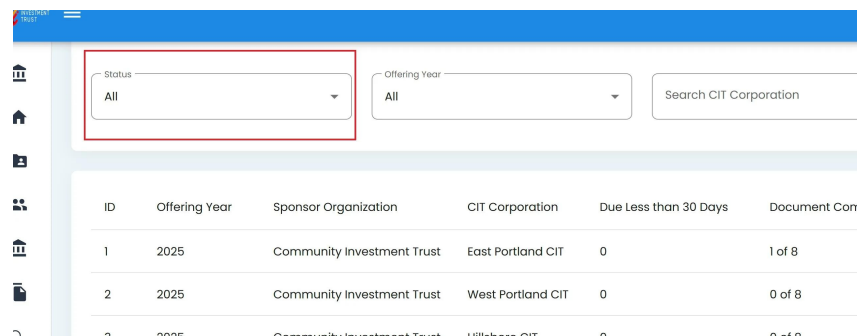
Sort columns by [Descending](#) or [Ascending](#) by clicking on column name.

Status Filters for Onboarding Documents Table

The table can be filtered by the following Statuses:

- [All](#)
- [Pending](#)
- [Completed](#)

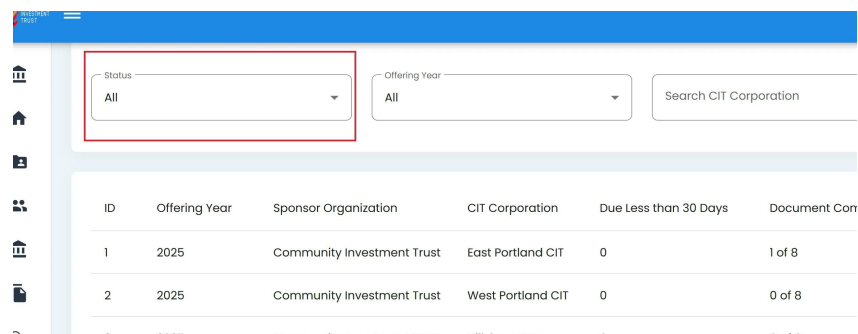
1. Find and select the [Status](#) dropdown.



The screenshot shows the top of the application interface. A red box highlights the 'Status' dropdown menu, which currently shows 'All'. To its right is an 'Offering Year' dropdown, also showing 'All', and a 'Search CIT Corporation' text input field. Below these filters is a table with the following data:

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Con
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8
3	2025	Community Investment Trust	Willamette CIT	0	0 of 8

2. Select the desired status from the dropdown.



This screenshot is identical to the previous one, showing the same interface with the 'Status' dropdown highlighted by a red box. The table data remains the same:

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Con
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8
3	2025	Community Investment Trust	Willamette CIT	0	0 of 8





Note

The table should automatically update to only show rows of the selected [Status](#).

Action: View More Details

To view more details about each document in the onboarding process for the selected CIT Corporation, do the following:

1. Select the [View More Icon](#) from the desired row.

ID	Sponsor Organization	CIT Corporation	Document Complete	Pending For Approval	New Message	Status	Action
4	Community Investment Trust	East Portland CIT	3 of 4	0	0	Pending	
7	Community Investment Trust	West Portland CIT	3 of 4	0	0	Pending	
8	Community Investment Trust	Hillsboro CIT	0 of 4	2	0	Pending	
12	Community Investment Trust	RK Entity	0 of 4	0	0	Pending	

✔ Action Complete

This action will take you to the [Offering Document Details](#) page.

Onboarding Document Details Page

The Onboarding Document Details page provides comprehensive information about all documents related to the selected CIT Corporation's onboarding process.








Available Information

On this page, you can:

- View the status of each required document
- Access document submission history
- Review any messages or notes associated with the onboarding process
- See deadlines for document submissions

Onboarding Documents Table

The [Onboarding Documents](#) table is what first appears on the homepage of the [CIT Corporation Onboarding](#) page section:

CIT Corporation Onboarding Documents							
<div>Status</div> <div>All</div>		<div>Search CIT Corporation</div> <div></div>					
ID	Sponsor Organization	CIT Corporation	Document Complete	Pending For Approval	New Message	Status	Action
4	Community Investment Trust	East Portland CIT	3 of 4	0	0	Pending	
7	Community Investment Trust	West Portland CIT	3 of 4	0	0	Pending	
8	Community Investment Trust	Hillsboro CIT	0 of 4	2	0	Pending	
12	Community Investment Trust	RK Entity	0 of 4	0	0	Pending	
13	Community Investment Trust	John Entity's Test	0 of 4	0	0	Pending	
18	Replicator Community	PP Entity	0 of 4	0	0	Pending	
20	PT	Shahzad	0 of 4	0	0	Pending	

The [Onboarding Documents Table](#) table provides a brief, but detailed, overview of where each CIT Corporation is at in the onboarding process.

- [Column Explanation](#)

- [Status Filter](#)
- [View More Details](#)

CIT Onboarding Documents Table: Columns Explained

CIT Corporation Onboarding Documents

Status
All

Search CIT Corporation

ID	Sponsor Organization	CIT Corporation	Document Complete	Pending For Approval	New Message	Status	Action
4	Community Investment Trust	East Portland CIT	3 of 4	0	0	Pending	View More Details
7	Community Investment Trust	West Portland CIT	3 of 4	0	0	Pending	View More Details
8	Community Investment Trust	Hillsboro CIT	0 of 4	2	0	Pending	View More Details

There are 8 columns in the [Onboarding Documents Table](#) table:

- [ID](#) column - The [ID](#) associated with the process itself.

Note

This [ID](#) can be used for {insert significance of **ID**}

- [Sponsorship Organization](#) column - The **Sponsorship Organization** that is sponsoring the onboarding process.
- [CIT Corporation](#) column - The **CIT Corporation** that is being onboarded.
- [Document Complete](#) column - Shows the number of onboarding documents a corporation has completed.
- [Pending For Approval](#) column - Number of documents that have been submitted but are pending approval.
- [New Message](#) column - Will show the number of new messages regarding the onboarding process.
- [Status](#) column - Status of where the corporation is at on the Offering process (i.e., [All](#) , [Pending](#) , [Complete](#))
- [Action](#) column
 - [View More Details](#)` : Action to view more details about the documents and where they are at on the onboarding process for the selected CIT Corporation.

Column Sorting

Sort columns by [Descending](#) or [Ascending](#) by clicking on column name.

CIT Corporation Offering

Table of Contents

[Features: CIT Corporation Offering](#)
[Offering Documents Table](#)

[Features: CIT Corporation Offering](#)

The [CIT Corp Offering](#) section helps you track the progress of every offering made by CIT Corporations.

This section also allows you to:

- [Quickly view important information about each offering](#)
- [Access in-depth offering details](#)
- [Filter by Offering Status](#) (i.e., All, Pending, OR Completed)
- [Filter by Offering Year](#)

3

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ering

CIT Corporation Offering Documents

Filter

Status

All

Offering Year

All

Search CIT Corporation

Q

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Complete	New Message	Status	Action
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8	0	Pending	
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8	0	Pending	
3	2025	Community Investment Trust	Hillsboro CIT	0	0 of 8	0	Pending	
4	2025	Community Investment Trust	RK Entity	0	0 of 8	0	Pending	
5	2025	Community Investment Trust	John Entity	0	0 of 8	0	Pending	
6	2025	Replicator Community	PP Entity	0	0 of 8	0	Pending	
7	2025	PT	Shahzad	0	0 of 8	0	Pending	
8	2025	PT	LL	0	0 of 8	0	Pending	
9	2025	Community Investment Trust	BN	0	0 of 8	0	Pending	
10	2025	Community test	CIT corp	0	0 of 8	0	Pending	

Items per page:

10

1 - 10 of 30

<

>

CIT Corporation Offering Homepage

Offering Documents Table

The **Offering Documents Table** is what first appears on the homepage of the **Corporation Offering Documents** section.

The **Offering Documents Table** provides a brief, but detailed, overview of where each CIT Corporation is at in the Offering process.

Need More Information?

For more details on specific features, see the sections above.

CIT Offering Documents Table: Columns Explained

CIT Corporation Offering Documents								
Filter +								
Status All			Offering Year All		Search CIT Corporation			
ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Complete	New Message	Status	Action
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8	0	Pending	
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8	0	Pending	
3	2025	Community Investment Trust	Hillsboro CIT	0	0 of 8	0	Pending	

CIT Offering Documents Table Columns

There are 8 columns in the [Offering Documents Table](#):

- **ID** - The **ID** associated with the process itself.

Note

This **ID** can be used for {insert significance of **ID**}

- **Offering Year** - The **Offering Year** that is associated with the offering process.
- **Sponsor Organization** - The **Organization** that is sponsoring the Offering.
- **CIT Corporation** - The **CIT Corporation** associated with the Offering.
- **Due Less than 30 Days** - This shows how many Offering Documents are due in less than 30 days.
- **Document Complete** - Shows the number of Offering documents a corporation has completed.
- **New Message** - Will show the number of new messages regarding the Offering process.
- **Status** - Status of where the corporation is at on the Offering process (i.e., **All**, **Pending**, **Complete**)
- **Action**
 - **VIEW MORE DETAILS** : Action to view more details about the documents and where they are at on the offering process for the selected CIT Corporation.

Column Sorting

Sort columns by **Descending** or **Ascending** by clicking on column name.

CIT Offering Status Filter

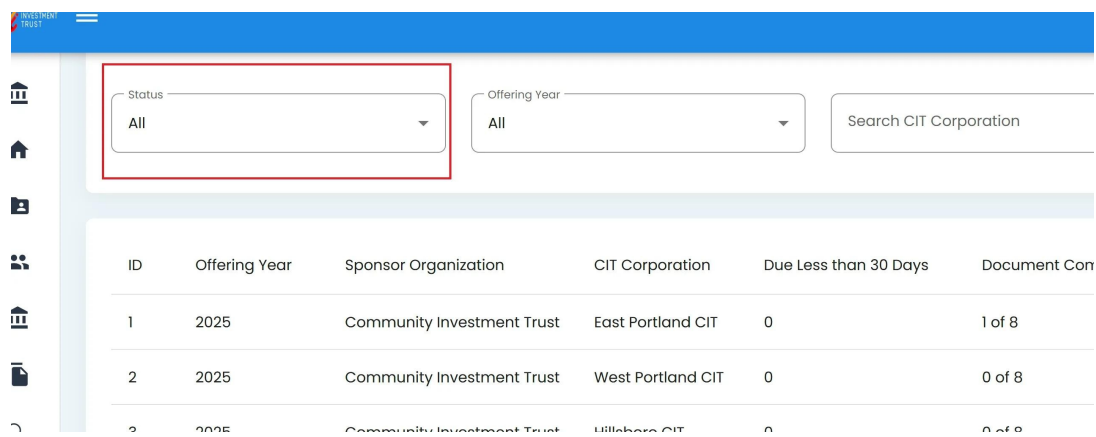
Status Filter Options

The [Offering Documents Table](#) can be filtered by the following **Status** options:

- **All**
- **Pending**
- **Completed**

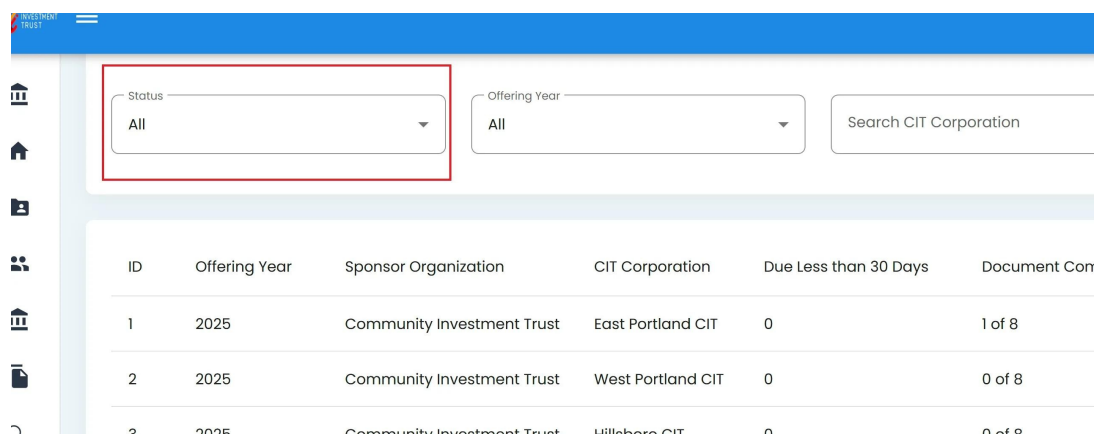
How to Filter by Status

1. Find and select the Status dropdown.



Status Filter Location

2. Select the desired status from the dropdown.



Status Dropdown Options

✔ Action Complete

This action will filter the Offering Documents Table based on the selected Status.

Status Types

Status Types




- All : Displays all CIT Corporations regardless of their offering status
- Pending : Shows only CIT Corporations with offering documents that are still in process
- Completed : Shows only CIT Corporations that have completed all offering document requirements

View More Details

View More Details Action

To view more details about each document in the Offering process for the selected CIT Corporation, do the following:

1. Select the View More Icon from the desired row.

Offering List									
Filter									
Sponsor Organization/CIT Corporation				Search Offering Name, Sponsor Organization, CIT Corporation, and Year					
All									
Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$20.21	\$335.00	\$35.00	\$0.00	01/10/2025	
Community Investment Trust	West Portland CIT	2025	fdgldg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	Tag gagafisafa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	

View More Details Icon Location

✔ Action Complete

This action will take you to the [Offering Document Details](#) page.

Offering Document Details Page

The Offering Document Details page provides comprehensive information about all documents related to the selected CIT Corporation’s offering process.

Available Information

On this page, you can:

- View the status of each required document
- Access document submission history
- Review any messages or notes associated with the offering process
- See deadlines for document submissions

Investor Documents

The  **Investor Documents Page** allows you to quickly:

- Access,
- Filter, And
- Download important investment documents.

This section also allows you to:

- Filter documents by **CIT Corporation**.
- Search for specific investor documents.
- View document details or download documents directly.

COMMUNITY INVESTMENT TRUST

John Doe (John s)

My Accounts

Dashboard

Profile

User

Account

Document

CIT Corp. Onboarding

CIT Corp. Offering

Investor Documents

Offering

Setting

Investor Documents

Filter

CIT Corporation

All

Search

ID	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
29	Tom Cruse	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/23/2025	<div><div></div><div></div></div>
28	Tom Cruse	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/23/2025	<div><div></div><div></div></div>
27	Tom Cruse	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/23/2025	<div><div></div><div></div></div>

Investor Documents, Homepage and Location

Table: Investor Documents

The **Investor Documents Table** is the primary interface for accessing investor-related files:

Investor Documents							
<div><div>Filter</div><div><div>CIT Corporation</div><div>East Portland CIT</div></div><div><div>Search</div><div></div></div></div>							
ID ↑	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
11	Janet Murphy	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/16/2025	<div><div></div><div></div></div>
12	Janet Murphy	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/16/2025	<div><div></div><div></div></div>
14	Janet Murphy	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/17/2025	<div><div></div><div></div></div>

The **Investor Documents Table** provides a concise yet informative overview of all documents related to each investor.

Table Columns Explained

Investor Documents

Filter

CIT Corporation

East Portland CIT

Search



ID ↑	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
11	Janet Murphy	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/16/2025	
12	Janet Murphy	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/16/2025	
14	Janet Murphy	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/17/2025	

The table contains 7 columns:

- **ID** - Unique identifier associated with each document.
- **Investor** - Name of the investor.
- **CIT Corporation** - The CIT Corporation associated with the investor.
- **Offering Year** - Year of the investment offering.
- **Filename** - Name of the document file.
- **Document Type** - Type of the document (e.g., Subscription Agreement, Offering Document).
- **Signed Date** - The date the document was signed.
- **Action** - Contains actions:
 - **VIEW DETAILS** : Opens document details in a new tab.
 - **DOWNLOAD** : Initiates document download.

Column Sorting

You can sort columns (ascending or descending) by clicking on the column headers.

Filter by CIT Corporation

You can filter the table by the CIT Corporation:

1. Click the **CIT Corporation** dropdown.

Investor Documents

Filter

CIT Corporation

All

Search



2. Select the desired CIT Corporation or **All** from the dropdown.

Investor Documents					
<div> <div>Filter</div> <div> <div>CIT Corporation</div> <div>All</div> <div> <div>All</div> <div>East Portland CIT</div> </div> </div> </div> <div>Search</div>					
ID	Investor	CIT Corporation	Offering Year	Filename	
14	Janet Murphy	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	
17	New UserInvest	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	

How tp Search Investor Documents

To search for a specific document or investor:

1. Find the **Search** bar.

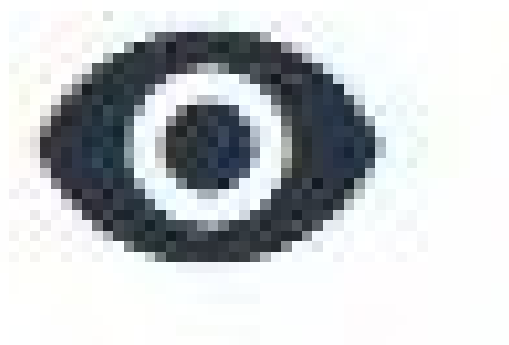
Investor Documents							
<div> <div>Filter</div> <div> <div>CIT Corporation</div> <div>All</div> </div> <div> <div>New</div> <div></div> </div> </div>							
ID	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
15	New UserInvest	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/22/2025	
16	New UserInvest	East Portland CIT	2025	2025 Annual Update to Offering Circular I23024.pdf	Offering Document	01/22/2025	
17	New UserInvest	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/22/2025	

2. Search by **Investor** Name.
3. Press **Enter** or click the search icon to perform the search.

Actions: View Details and Download

Each row provides two actions:

- **View Details:**
 1. Click the **eye icon** to open document details in a new tab.



```
- **Download**:  
  1. Click the ``download icon`` to start downloading the document.  
  
````{only} html  
````{lazyfigure} ../../_static/solo_app/Document/icons/download-document-icon.jpeg  
:width: 50%  
:align: center
```

View More Details: Documents

The [View More Details](#) pages for the [Onboarding Documents](#) and [Offering Documents](#) sections provide similar functionality. The instructions provided here apply to both sections.

The [View More Details](#) action for either page will you to the following page:

CIT Corporation Offering Documents: East Portland CIT, Year: 2025	
Status	
All 8	
Pending Upload 6	
Pending Approval 2	
Completed 1	
7 Document(s) left	
<div><div><div><div>Appraised value</div><div>File: EsrowAgreement.pdf Uploaded on October 14, 2024 @ 3:55 PM by John Service Due On: October 15, 2024 Approved on October 14, 2024 @ 4:26 PM by John Service</div><div>Complete</div></div></div><div>Messages (9)</div></div>	
<div><div><div><div>Board resolutions for share price change</div><div>File: Document 2.pdf Uploaded on October 17, 2024 @ 3:40 PM by John Service Due On: December 1, 2024</div><div>Pending for Approval</div></div></div><div>Messages (1)</div></div>	
<div><div><div><div>Stock Offering Circular</div><div>Document Pending Upload Due On: December 1, 2024 Overdue</div></div></div><div>Messages (0)</div></div>	
<div><div><div><div>Subscription Agreement</div><div>Document Pending Upload Due On: December 1, 2024 Overdue</div></div></div><div>Messages (0)</div></div>	
<div><div><div><div>Shareholder Agreement</div><div>File: Magic Partnership LLC Subscription Agreement.pdf Uploaded on October 14, 2024 @ 5:15 PM by Entity Admin Due On: December 1, 2024</div><div>Pending for Approval</div></div></div><div>Messages (1)</div></div>	
<div><div><div><div>Investor Slides</div><div>Document Pending Upload Due On: December 1, 2024 Overdue</div></div></div><div>Messages (1)</div></div>	
<div><div><div><div>Financial projections</div><div>Document Pending Upload Due On: December 1, 2024 Overdue</div></div></div><div>Messages (0)</div></div>	
<div><div><div><div>Invoice Paid</div><div>Document Pending Upload Due On: December 31, 2024 Overdue</div></div></div><div>Messages (0)</div></div>	

Looking for an Overview?

See [cit-corporation-onboarding-page](#) or [CIT Corporation Offering](#)

Layout Explanation

View Details: Tabs Explained

CIT Corporation Onboarding Documents: East Portland CIT

Status

All4

Upload Pending1

Pending Approval0

Completed3

1 Document(s) left

License Agreement between CIT Services LLC and CIT Corporation

File: Master Subscription Document.pdf | Uploaded on October 11, 2024 @ 4:34 PM by John Service | Approved on October 11, 2024 @ 4:38 PM by John Service

Complete

Messages (12)

CIT Corporation Bylaws & Articles of Incorporation

File: FormTest.pdf | Uploaded on October 17, 2024 @ 3:38 PM by John Service | Approved on November 5, 2024 @ 1:10 PM by John Service

Complete

Messages (2)

DPLC Agreement between bank and Sponsor Organization

File: DPLC-Agreement-between-bank-and-Sponsor-Organization.pdf | Uploaded on January 8, 2025 @ 1:47 AM by Entity Admin | Expired: January 30, 2025 | Expired

Pending for Approval

Messages (2)

The detailed view of the [Documents](#) page contains 4 tabs to sort through:

- [All](#) - All documents, regardless of status.
- [Upload Pending](#) - Documents awaiting upload.
- [Pending Approval](#) - Documents awaiting approval.
- [Completed](#) - Documents fully approved and completed.

View Details: Cards Explained

CIT Corporation Offering Documents: East Portland CIT, Year: 2025

Status

All8

Pending Upload5

Pending Approval2

Completed1

7 Document(s) left

Appraised value

File: EscrowAgreement.pdf | Uploaded on October 14, 2024 @ 3:55 PM by John Service | Due On: October 15, 2024 | Approved on October 14, 2024 @ 4:26 PM by John Service

Complete

Messages (9)

Board resolutions for share price change

File: Document 2.pdf | Uploaded on October 17, 2024 @ 3:40 PM by John Service | Due On: December 1, 2024

Pending for Approval

Messages (1)

Stock Offering Circular

Document Pending Upload | Due On: December 1, 2024 | Overdue

Each card will display information about a document, including:

- File Name
- File Type
- Date and Time Uploaded
- Uploaded By
- Status
- (If Applicable) Approved By
- Messages

Available Actions

Each Status has its own set of available actions:

- [All Status](#)
- [Upload Pending Status](#)
- [Pending Approval Status](#)

Offering

The following Sections are included in the Offering category:

- [Offerings](#)
- [Enrollments](#)

Offerings

The Offerings section covers everything listed in the **Table of Contents** below:

Table of Contents

[Offerings](#)

- [Location: Offerings](#)
- [Table: Offerings List](#)
- [Columns: Offerings List Table](#)

Location: Offerings

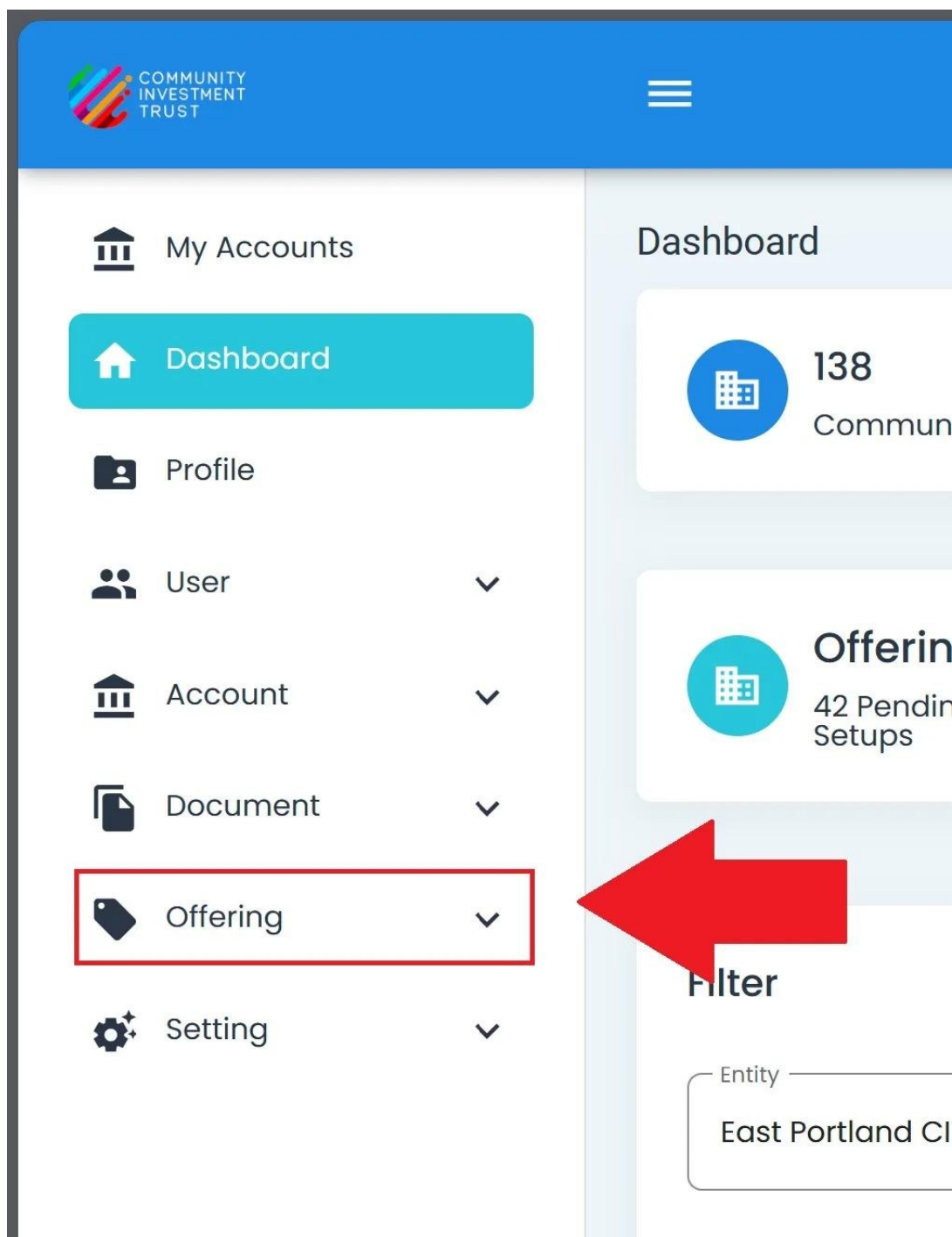
To Find the Offerings List Homepage:

1. Locate the primary sidenav to the left of the page.

Don't see the sidenav?

See [How to Toggle Primary Sidebar](#) for more information.

2. SELECT the dropdown for the Offering category.



Offering, Offerings Primary Sidenav Dropdown Location

3. from the dropdown.

My Accounts
Dashboard
Profile
User
Account
Document
CIT Corp. Onboarding
CIT Corp. Offering
Investor Documents
Offering
Offerings
Setting

Offering List

Filter

Sponsor Organization/CIT Corporation
All
Search Offering

Sponsor Organization	CIT Corporation	Year	Offering Name	
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsa	\$
Community Investment Trust	West Portland CIT	2025	dgsg sgsg ga	\$
Community Investment Trust	East Portland CIT	2024	EAST PORTLAND CIT CORP 2024	\$
Community Investment Trust	West Portland CIT	2024	WEST PORTLAND CIT CORP 2024	\$
Community Investment Trust	East Portland CIT	2023	EAST PORTLAND CIT CORP 2023	\$

Offering, Offerings Homepage

Table: Offerings List

The **Offerings List** table is what first appears on the homepage of the **Offerings** section.

Offering List									
Filter									
Sponsor Organization/CIT Corporation				Search Offering Name, Sponsor Organization, CIT Corporation, and Year					
All									
Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$20.21	\$335.00	\$35.00	\$0.00	01/10/2025	View
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	View
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	View
Community Investment Trust	West Portland CIT	2025	dgsg sgsg ga	\$22.00	\$0.00	\$0.00	\$0.00	01/09/2025	View
Community Investment Trust	East Portland CIT	2024	EAST PORTLAND CIT CORP 2024	\$19.65	\$4,095.00	\$520.00	\$125.00	01/01/2024	View
Community Investment Trust	West Portland CIT	2024	WEST PORTLAND CIT CORP 2024	\$15.86	\$0.00	\$0.00	\$0.00	01/01/2024	View
Community Investment Trust	East Portland CIT	2023	EAST PORTLAND CIT CORP 2023	\$19.02	\$0.00	\$50.00	\$0.00	12/30/2022	View

Offering, Offerings Homepage, Offerings List table

Columns: Offerings List Table

The **Offerings List** table has the following **Columns** :

Offering List

Filter

Sponsor Organization/CIT Corporation

All

Search Offering Name, Sponsor Organization, CIT Corporation, and Year



Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action
Community Investment Trust	East Portland CIT	2023	CIT OFFERING 2023	\$20.21	\$333.00	\$33.00	\$0.00	01/10/2023	
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsafo	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	
Community Investment Trust	West Portland CIT	2025	dgsg sgasg ga	\$22.00	\$0.00	\$0.00	\$0.00	01/09/2025	
Community Investment Trust	East Portland CIT	2024	EAST PORTLAND CIT CORP 2024	\$19.65	\$4,095.00	\$520.00	\$125.00	01/01/2024	
Community Investment Trust	West Portland CIT	2024	WEST PORTLAND CIT CORP 2024	\$15.86	\$0.00	\$0.00	\$0.00	01/01/2024	
Community Investment Trust	East Portland CIT	2023	EAST PORTLAND CIT CORP 2023	\$19.02	\$0.00	\$50.00	\$0.00	12/30/2022	

Offering, Offerings Homepage, Offerings List table

- Sponsor Organization** : The sponsor associated with the offering
- CIT Corporation** : The CIT Corporation associated with the offering
- Year** : The year of the offering
- Offering Name** : The name of the offering
- Price Per Share** : The price per share of the offering
- Pending Amount** : The total pending amount of the offering
- Investment Amount** : The total investment amount of the offering
- Original Cashout Amount** : The original cashout amount of the offering
- Active Date** : The active date of the offering
- Action** : Available actions for the offering

Enrollments

The **Enrollments** section covers everything listed in the **Table of Contents** below:

Contents

[Enrollments](#)

- [Enrollments Homepage Location](#)
- [Related Sections](#)

Enrollments Homepage Location

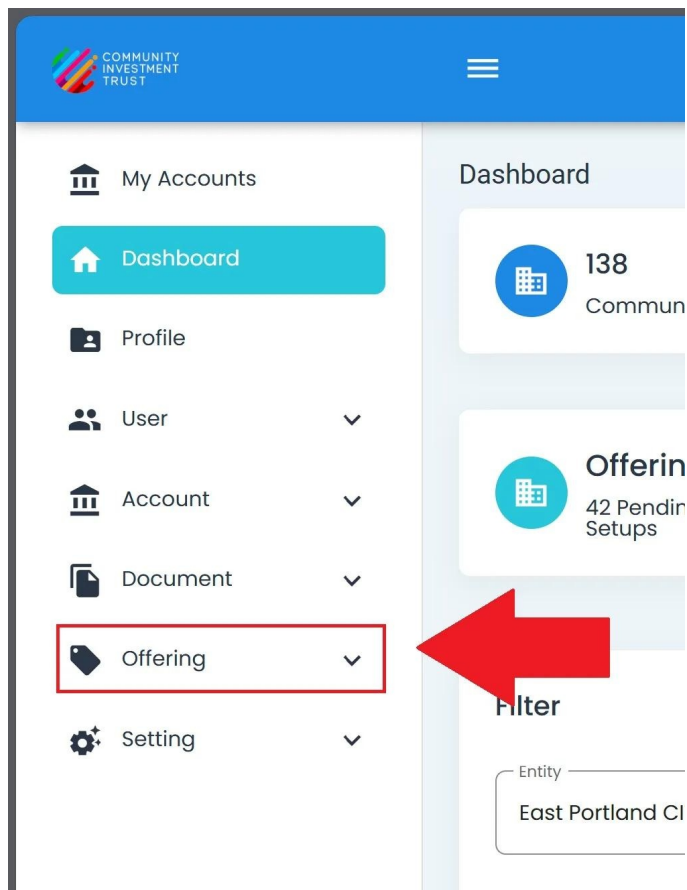
To Find the Enrollments List Homepage:

1. Locate the primary sidenav to the left of the page.

Don't see the sidenav?

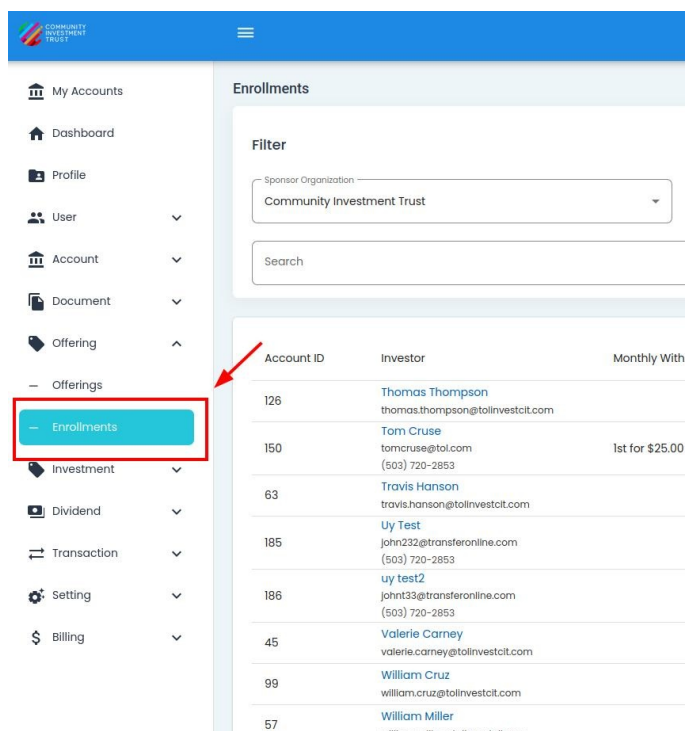
See [How to Toggle Primary Sidebar](#) for more information.

2. **SELECT** the dropdown for the **Offering** category.



Offering, Enrollments Primary Sidenav Location

3. from the dropdown.



Offering, Enrollments Homepage

Related Sections

- See the [Enrollments Table](#) for more information on the Enrollments Table Columns

- See the [Enrollments Search](#) for more information on how to search for Investors in the [Enrollments](#) table.

Enrollments Table

The [Enrollments](#) table provides a comprehensive overview of the Enrollment Statuses of each [Investor](#) in the system.

Contents

Enrollments Table

Columns: Enrollments Table

Available Enrollment Statuses

Enrollments

Filter

Sponsor OrganizationCommunity Investment Trust

CIT CorporationEast Portland CIT

OfferingCIT OFFERING 2025 (2025)

StatusAll

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@tolinvestit.com								Holding - Eligible
39	Allison Anderson allison.anderson@tolinvestit.com								Holding - Eligible
125	Caleb Hall caleb.hall@tolinvestit.com								Holding - Not Eligible
119	Chad Ballard chad.ballard@tolinvestit.com								Holding - Not Eligible
61	Elizabeth Marshall elizabeth.marshall@tolinvestit.com								Holding - Eligible
50	Gary Palmer gary.palmer@tolinvestit.com								Holding - Eligible
--	Jennifer Allen								

Offering, Enrollments, Enrollments Table, Columns Explained

Columns: Enrollments Table

The [columns](#) for the [Enrollments](#) table can be found at the top of the table:

Enrollments

Filter

Sponsor OrganizationCommunity Investment Trust

CIT CorporationEast Portland CIT

OfferingCIT OFFERING 2025 (2025)

StatusAll

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@tolinvestit.com								Holding - Eligible
39	Allison Anderson allison.anderson@tolinvestit.com								Holding - Eligible
125	Caleb Hall caleb.hall@tolinvestit.com								Holding - Not Eligible
119	Chad Ballard chad.ballard@tolinvestit.com								Holding - Not Eligible
61	Elizabeth Marshall elizabeth.marshall@tolinvestit.com								Holding - Eligible
50	Gary Palmer gary.palmer@tolinvestit.com								Holding - Eligible
--	Jennifer Allen								

Offering, Enrollments, Enrollments Table, Columns

The [Enrollments](#) table will have the following columns:

- [Account ID](#)
- [Investor](#)
- [Monthly Whiteboard](#)
- [Heading for Whiteboard](#)

- **Processing**
- **Avoiding Share Resource**
- **Investment Amount**
- **Shares**
- **Holding Investment/Cashout**
- **Status**

Available Enrollment Statuses

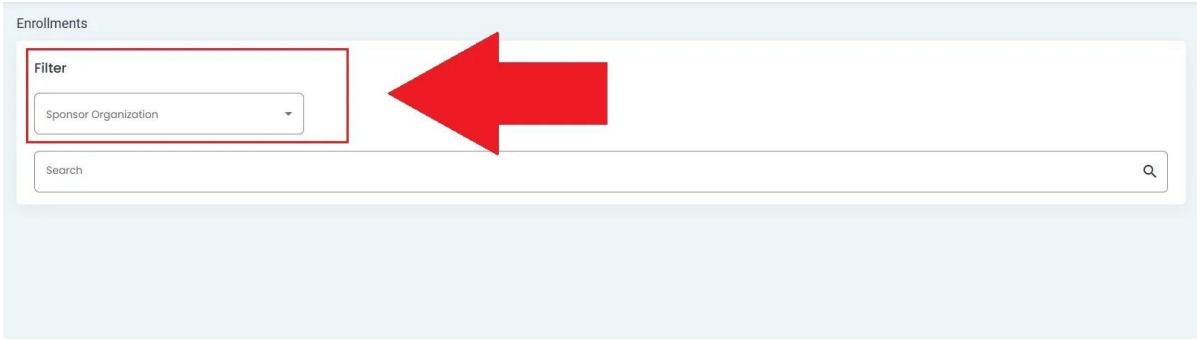
The **Enrollments** table allowws you view any **Investors** with the following status:

- **All**
- **Test Account**
- **Option: Active**
- **Option: In Process**
- **Stop Investment**
- **Cashout**
- **ACH Failed**
- **Holding (both **Eligible** and **Not Eligible**)**
- **Admin Stop**

Using Enrollments Filters

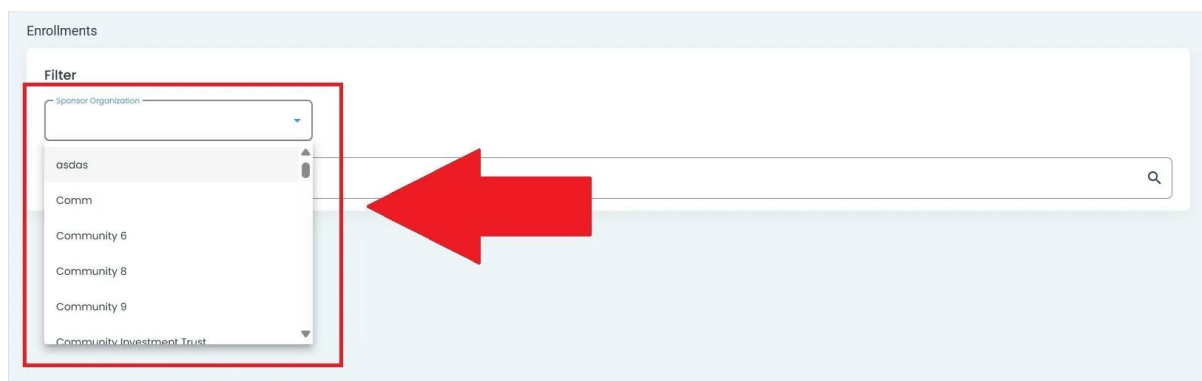
To Filter Enrollments:

- Find the **Sponsor Organization** dropdown.



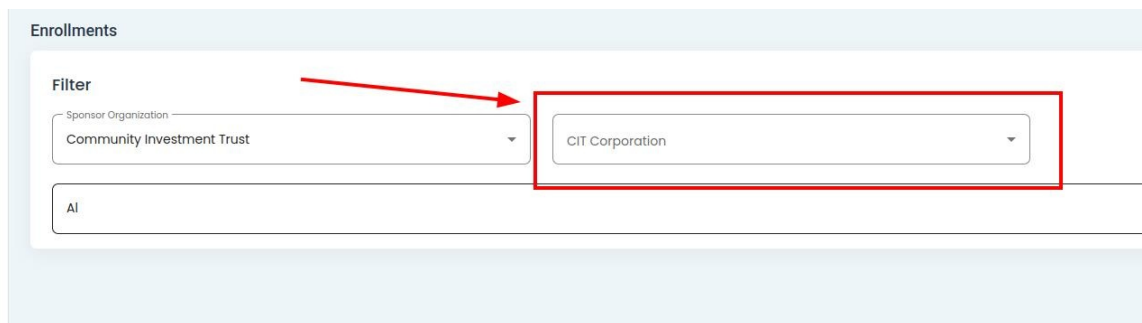
Offering, Enrollments, Sponsor Organization Filter Location

- Click on the dropdown to see available filter options.



Offering, Enrollments, Filter Dropdown Options

After selecting, the **CIT Corporation** dropdown will appear:



Offering, Enrollments, Filter Selection Results With Two Dropdowns

Note

Two dropdowns will appear if the selected **Sponsor Organization** has only one **CIT Corporation**.

Warning: this feature is currently in development

This feature is currently in development and may not be available in all environments.

3. Select the organization (e.g., CIT Corporation).

Enrollments

Filter

Sponsor Organization: Community Investment Trust

CIT Corporation: BN

BN

CIT corp

East Portland CIT

Fake Corp

gsdgdsg

Hillsboro CIT

Offering, Enrollments, CIT Corporation Filter Selection

After selecting, the **Offering** and **Status** dropdowns will appear.

- The **Offering** dropdown will populate with the first option on the list.
- The **Status** dropdown will populate with the first option on the list (**All**).

Enrollments

Filter

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Offering: CIT OFFERING 2025 (2025)

Status: All

All

Offering, Enrollments, Offering and Status Dropdowns Appear

4. Select the Offering

1. Find and **SELECT** the **Offering** dropdown.

Enrollments

Filter

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Offering: CIT OFFERING 2025 (2025)

Status: All

All

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@calinvestat.com								Waiting - Eligible

Offering, Enrollments, Offering Dropdown Location

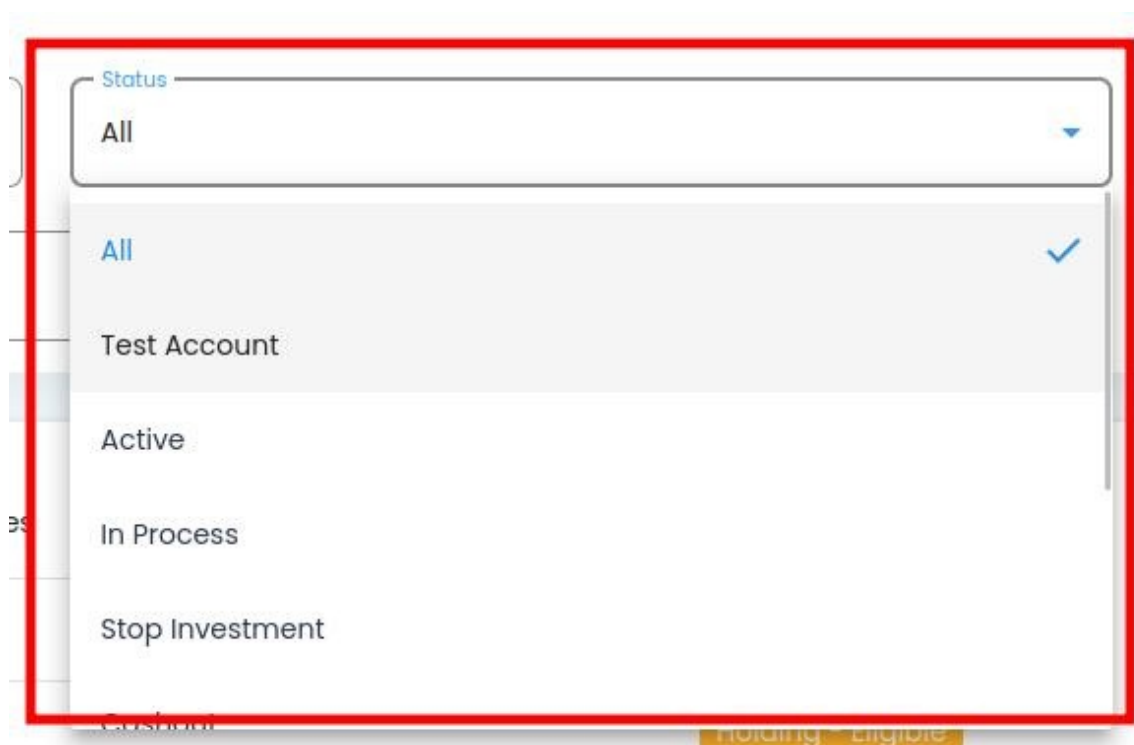
2. **SELECT** an offering from the offering dropdown.



Offering, Enrollments, Offering Dropdown Selection

5. Select the Status

1. Find and SELECT the Status dropdown.



Offering, Enrollments, Status Dropdown Location

2. SELECT a status from the status dropdown.

Enrollments

Filter

Sponsor Organization

Community Investment Trust

CIT Corporation

East Portland CIT

Search

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	A
53	Alex's Williams alex.williams@tolinvestcit.com				
39	Allison Anderson allison.anderson@tolinvestcit.com				
92	Amanda Castillo amanda.castillo@tolinvestcit.com				
51	Arthur Murphy arthur.murphy@tolinvestcit.com				
73	Austin Gilbert austin.gilbert@tolinvestcit.com				

Offering, Enrollments, Search Bar Location

Available Statuses

The **Status** dropdown will populate with the following options:

Using Enrollments Search

This section covers how search for Investors in the **Enrollments** table works and what the options are.

Using Filters for Enrollments Table

See [Using Enrollments Filters](#) for more information.

Possible Search Options: Enrollemnts Table

You can search for for names that would be in the **Investor** column.

Enrollments

Filter

Sponsor Organization

Community Investment Trust

CIT Corporation

East Portland CIT

Offering

CIT OFFERING 2025 (2025)

Status

All

A|

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal ↑	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
53	Alex's Williams alex.williams@tolinvestcit.com							
39	Allison Anderson allison.anderson@tolinvestcit.com							
125	Caleb Hall caleb.hall@tolinvestcit.com							
119	Chad Ballard chad.ballard@tolinvestcit.com							
61	Elizabeth Marshall elizabeth.marshall@tolinvestcit.com							
50	Gary Palmer gary.palmer@tolinvestcit.com							
96	Jennifer Allen jennifer.allen@tolinvestcit.com							

How To: Search for Investors

To Search for Investors:

1. Place your cursor in the search bar.

Enrollments

Filter

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Offering: CIT OFFERING 2025 (2025)

Status: All

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@tolinvestcit.com								Heading - Highlight
39	Allison Anderson allison.anderson@tolinvestcit.com								Heading - Highlight
125	Caleb Hall caleb.hall@tolinvestcit.com								Heading - Highlight

Offering, Enrollments, Search Bar Location

2. Type the name of the **Investor** to see their **Status** and overview.

 **Search Results Automatically Populate**

>

Filter

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Offering: CIT OFFERING 2025

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issu
53	Alex's Williams alex.williams@tolinvestcit.com				
39	Allison Anderson allison.anderson@tolinvestcit.com				
125	Caleb Hall caleb.hall@tolinvestcit.com				
119	Chad Ballard chad.ballard@tolinvestcit.com				
61	Elizabeth Marshall elizabeth.marshall@tolinvestcit.com				
50	Gary Palmer gary.palmer@tolinvestcit.com				
96	Jennifer Allen jennifer.allen@tolinvestcit.com				

Offering, Enrollments, Search Example, Name in Field

3. **CLICK** the **Investor** to view their [Investor Details](#).

Investment

The **Investments** section covers everything listed in the **Table of Contents** below:

Contents

[Investment](#)

- [Investments Homepage Location](#)
- [Investments List Table Overview](#)
- [Using Investments Filters](#)

[Investments Homepage Location](#)

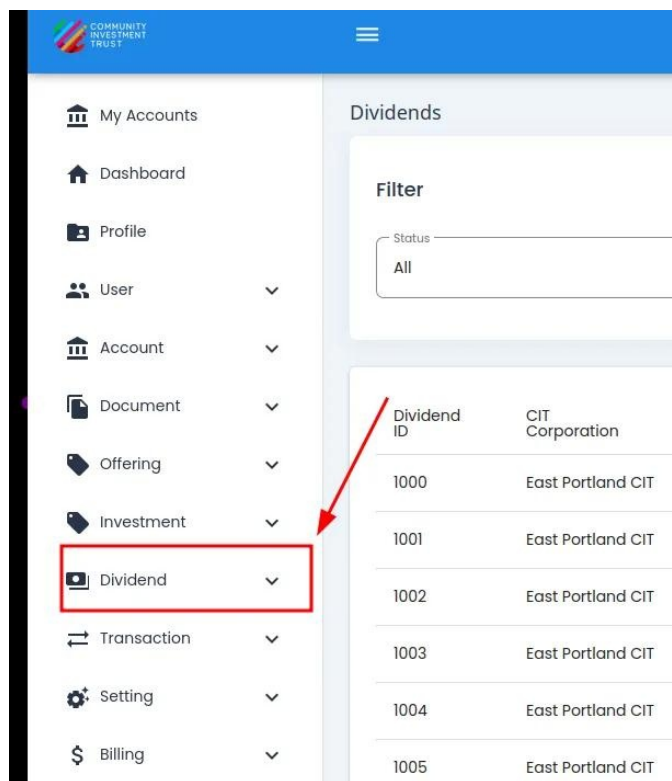
To Find the Investments List Homepage:

1. Locate the primary sidenav to the left of the page.

Don't see the sidenav?

See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **Investment** category.



Investment Category, Primary Sidenav Location

3. Select  **Investments** from the dropdown.

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981

Investment, Investments, Primary Sidenav Location

Investments List Table Overview

The **Investments List** table is what first appears on the homepage of the **Investments** section.

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	<button>Open</button>
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	<button>Open</button>
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	<button>Open</button>
1116	East Portland CIT	Tom Cruise tomcruise@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	<button>Open</button>
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	<button>Open</button>
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583 Carl Podeyn	2025	February 15, 2025	\$50.00	<button>Open</button>

Investment, Investments List Table

Using Investments Filters

To Filter Investments:

1. Locate the filter section at the top of the table.

Investments						
Filter						
Status	CIT Corporation	Search				
Open	All					
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583 Carl Podeyn	2025	February 15, 2025	\$50.00	Open

Investments Table Filter Section Highlighted

2. Click on the Status dropdown to filter by status.

Investments						
Filter						
Status	CIT Corporation	Search				
Open	All					
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583 Carl Podeyn	2025	February 15, 2025	\$50.00	Open

Investments Status Dropdown Location

The status dropdown will expand, showing available status options:

Investments						
Filter						
Status	CIT Corporation	Search				
Open	All					
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open

3. Select the organization dropdown (e.g., CIT Corporation).

Investments

Filter

Status: All

CIT Corporation: All

Search

CIT Corporation Dropdown Location

The dropdown will expand, showing available organization options:

Investments

Filter

Status: All

CIT Corporation: All

Search

Investor

Offering Year

Investment Date

Investment Amount

Status

CIT Corporation Dropdown Expanded

4. Click the search icon to apply filters.

Investments

Filter

Status: All

CIT Corporation: All

Search

Investor

Offering Year

Investment Date

Investment Amount

Status

New UserInvest

Search Icon Location

Your filtered results will appear:

Investments

Filter

Status: All

CIT Corporation: All

New UserInvest

Search

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	Open

Items per page: 10 1 - 2 of 2


Investor Summary

Monthly and Quarterly Investment Summary

Communication


Welcome to the  section.

Dividend

The following  are included in the Dividend category:

- [Dividends](#)
- [Cash Payouts](#)

[Dividends](#)

The  section covers everything listed in the **Table of Contents** below:

Contents

[Dividends](#)

- [Dividends Homepage Location](#)
- [Dividends List Table](#)
- [Columns: Dividends List Table](#)
- [Using Dividends Filters](#)
- [How to: Filter by Status](#)
- [How to: Filter by Sponsor Organization](#)
- [How to: Filter by CIT Corporation](#)



[Dividends Homepage Location](#)

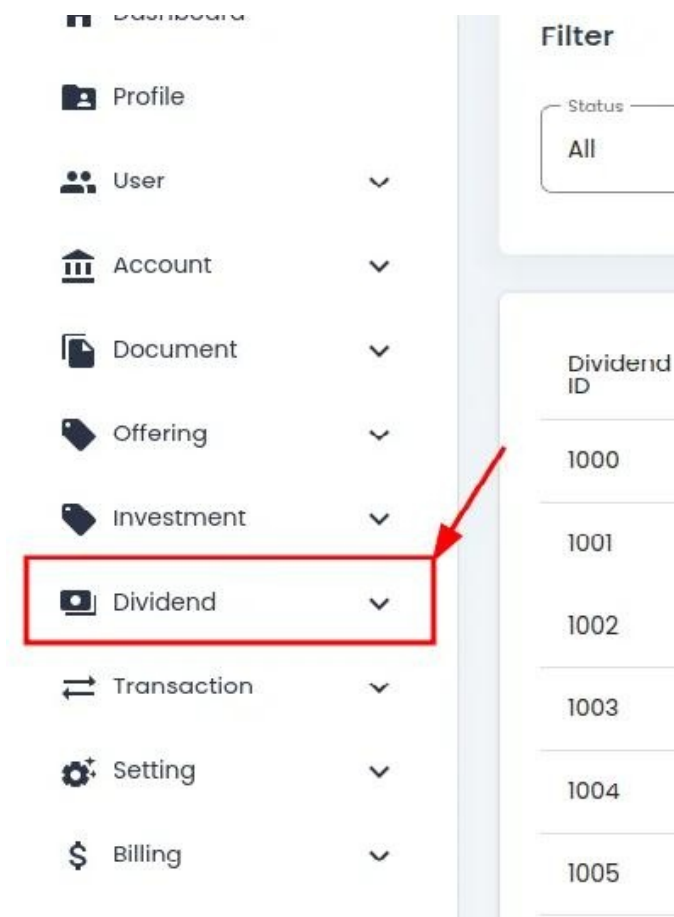
To Find the Dividends List Homepage:

1. Locate the primary sidenavigation to the left of the page.

Don't see the sidenav?

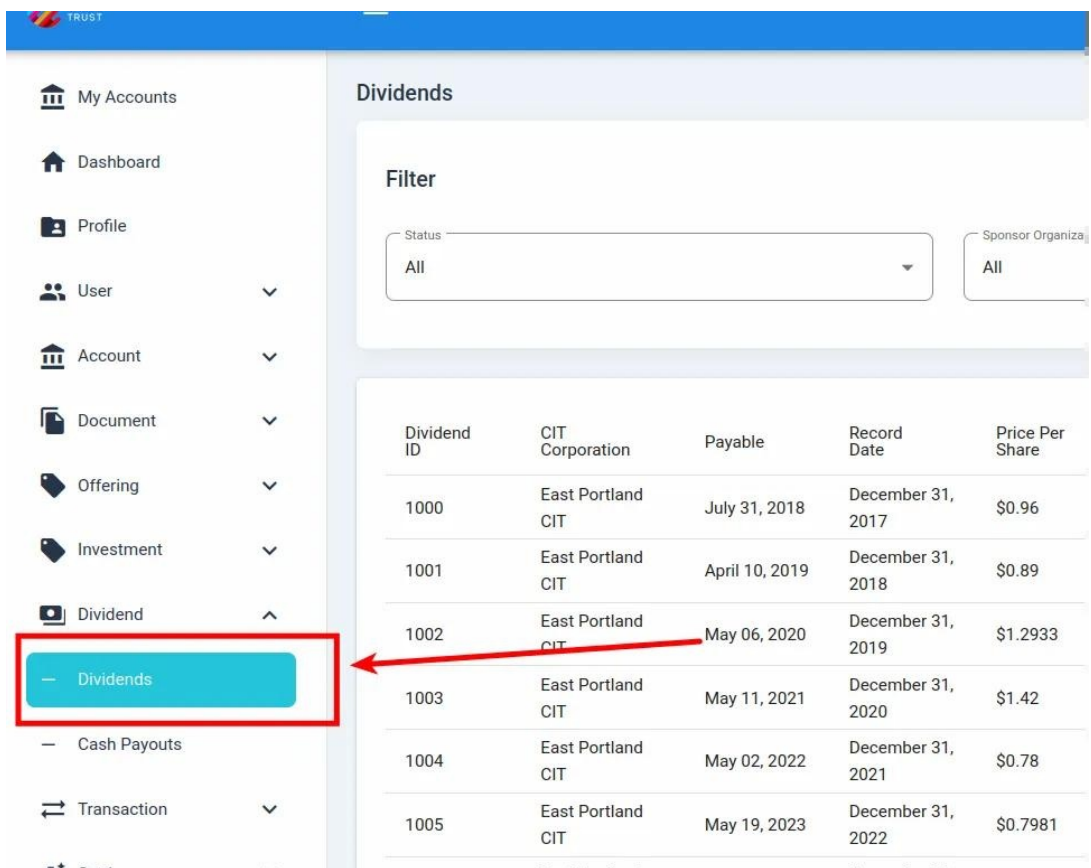
See [How to Toggle Primary Sidebar](#) for more information.

2.  the dropdown for the  **Dividend** category.



Dividend Category, Primary Sidenav, Dropdown Location

3. SELECT Dividends from the dropdown.



Dividend, Dividends Homepage, Primary Sidenav Location

Dividends List Table

The **Dividends List** table is what first appears on the homepage of the **Dividends** section.

Dividends

Filter

Status

All

Sponsor Organization

All

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	
1006	East Portland CIT	May 17, 2024	December 31, 2023	\$0.79	33,512.2014	\$26,474.65	\$0.00	1	Complete	
1007	East Portland CIT	February 28, 2025	February 13, 2025	\$1.65	11,655.48	\$19.24	\$4.20	7	Pending	

Items per page: 10

1 - 8 of 8

Dividends Homepage

Columns: Dividends List Table

The **Dividends List** table has the following **columns** :

- Dividend** : The dividend identifier or name
- CIT Corporation** : The corporation associated with the dividend
- Payable** : The date when the dividend is payable
- Record Date** : The date of record for the dividend
- Price Per Share** : The amount paid per share
- Total Shares** : The total number of shares eligible for the dividend
- Total Payout Amount** : The total amount to be paid for all shares
- Total Pending Payment Amount** : The amount still pending payment
- Number of Investors** : The number of investors receiving the dividend
- Status** : The current status of the dividend (e.g., Complete)
- Action** : Available actions for the dividend

Using Dividends Filters

To Filter Dividends:

1. Locate the filter section above the table.

Dividends

Filter

Status

All

Sponsor Organization

All

Dividend ID

CIT Corporation

Payable

Record Date

Price Per Share

Total Shares

Total Payout Amount

Total Pending Payment Amount

Number of Investors

Status

Action

1000

East Portland CIT

July 31, 2018

December 31, 2017

\$0.96

137.5

\$132.00

\$0.00

1

Complete

1001

East Portland CIT

April 10, 2019

December 31, 2018

\$0.89

3,475.0

\$3,092.75

\$0.00

1

Complete

1002

East Portland CIT

May 06, 2020

December 31, 2019

\$1.2933

9,293.3128

\$12,019.00

\$0.00

1

Complete

1003

East Portland CIT

May 11, 2021

December 31, 2020

\$1.42

9,293.3128

\$20,542.01

\$0.00

1

Complete

1004

East Portland CIT

May 02, 2022

December 31, 2021

\$0.78

21,684.64162

\$16,913.89

\$0.00

1

Complete

1005

East Portland CIT

May 19, 2023

December 31, 2022

\$0.7981

29,750.27747

\$23,744.48

\$0.00

1

Complete

Dividends Table Filter Section Highlighted

How to: Filter by Status

1. Find and CLICK on the Status dropdown located above the table.

Dividends

Filter

Status

All

Sponsor Organization

All

Dividend ID

CIT Corporation

Payable

Record Date

Price Per Share

Total Shares

Total Payout Amount

Total Pending Payment Amount

Number of Investors

Status

1000

East Portland CIT

July 31, 2018

December 31, 2017

\$0.96

137.5

\$132.00

\$0.00

1

1001

East Portland CIT

April 10, 2019

December 31, 2018

\$0.89

3,475.0

\$3,092.75

\$0.00

1

1002

East Portland CIT

May 06, 2020

December 31, 2019

\$1.2933

9,293.3128

\$12,019.00

\$0.00

1

1003

East Portland CIT

May 11, 2021

December 31, 2020

\$1.42

9,293.3128

\$20,542.01

\$0.00

1

1004

East Portland CIT

May 02, 2022

December 31, 2021

\$0.78

21,684.64162

\$16,913.89

\$0.00

1

Dividends, Status Dropdown Location

2. SELECT the Status you want to filter by from the dropdown.

Dividends

Filter

Status

All

All

Pending

Complete

Sponsor Organization

All

				Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	

Dividends, Status Dropdown Expanded

How to: Filter by Sponsor Organization

- Find and CLICK on the **Sponsor Organization** dropdown.

Dividends

Filter

Status

All

Sponsor Organization

All

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	

Sponsor Organization Dropdown Location

- SELECT the **Sponsor Organization** you want to filter by from the dropdown.

Dividends

Filter

Status

All

Sponsor Organization

All

Community Investment Trust

Dividend ID	CIT Corporation	Payable	Record Date	Share	Shares	Amount	Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	

Sponsor Organization Dropdown Expanded

How to: Filter by CIT Corporation

CIT Corporation Filter Availability

The option to filter by **CIT Corporation** is only available **after** a **Sponsor Organization** is selected.

1. Find and **CLICK** on the **CIT Corporation** dropdown.

Dividends

Filter

Status

All

Sponsor Organization

Community Investment Trust

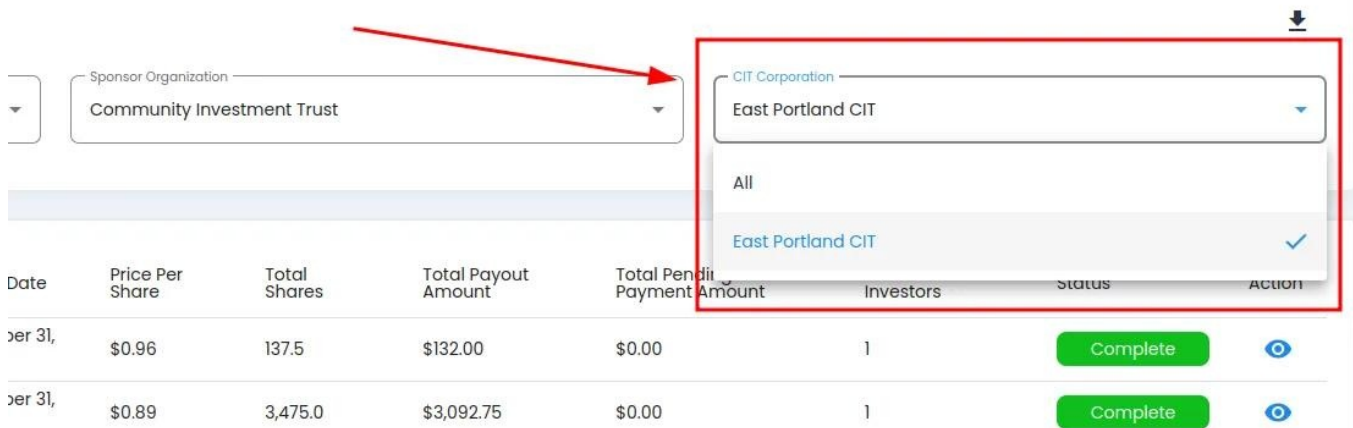
CIT Corporation

East Portland CIT

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	

CIT Corporation Dropdown Location

2. **SELECT** the **CIT Corporation** you want to filter by from the dropdown.



Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Investors	Status	Action
per 31,	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
per 31,	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	

CIT Corporation Dropdown Expanded

- ✓ Action Complete: The table will filter as the options are selected

Cash Payouts

The **Cash Payouts** section covers everything listed in the **Table of Contents** below:

Contents

Cash Payouts

- [Cash Payouts Homepage Location](#)
- [Cash Payouts List Table](#)
- [Columns: Cash Payouts List Table](#)
- [How to: View Details About the Investor for a Cash Payout](#)
- [Using Cash Payouts Filters](#)
- [How to: Filter by Status](#)
- [How to: Filter by Sponsor Organization](#)
- [How to: Search for Cash Payout Information](#)
- [How To: View More Information](#)

Cash Payouts Homepage Location

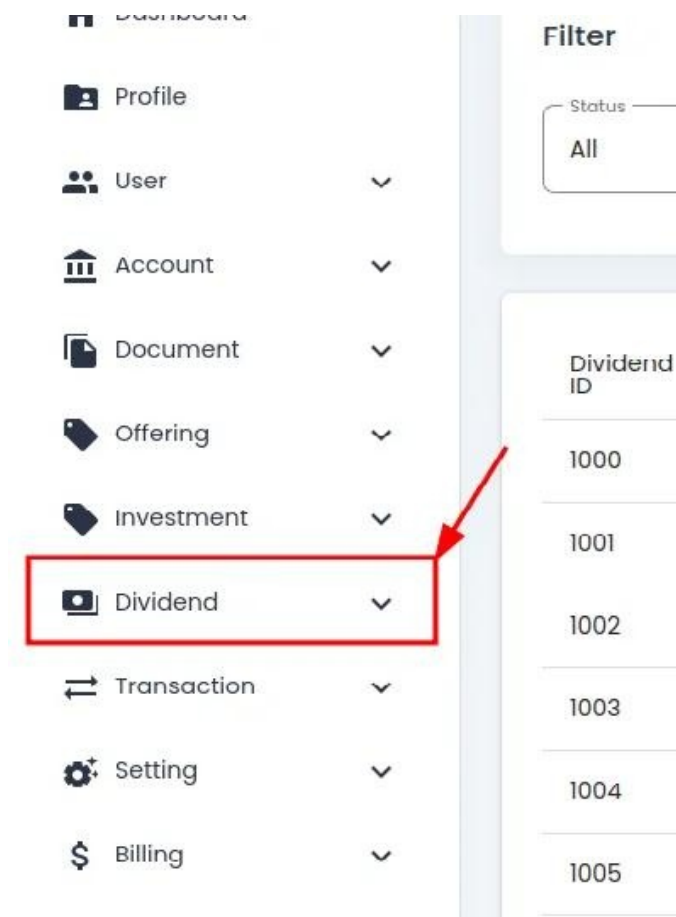
To Find the Cash Payouts List Homepage:

1. Locate the primary sidenav to the left of the page.

Don't see the sidenav?

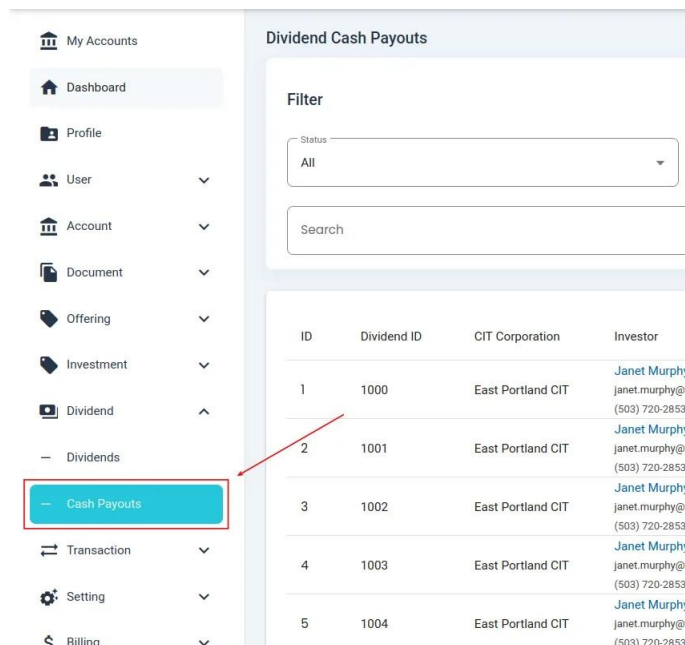
See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the **Dividend** category.



Dividend Category, Primary Sidenav, Dropdown Location

3. Select **Cash Payouts** from the dropdown.



Cash Payouts Homepage

Cash Payouts List Table

The **Cash Payouts List** table is what first appears on the homepage of the **Cash Payouts** section.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID	CIT Corporation ↑	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Cash Payouts List Table

Columns: Cash Payouts List Table

The **Dividend Cash Payouts** table has the following **Columns**:

- **Cash Payout**: The cash payout identifier or name
- **Organization**: The organization associated with the cash payout
- **Payable Date**: The date when the cash payout is payable
- **Amount**: The total amount of the cash payout
- **Status**: The current status of the cash payout
- **Action**: Available actions for the cash payout

How to: View Details About the Investor for a Cash Payout

1. Find the **Investor** column in the **Dividend Cash Payouts** table.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Dividend, Cash Payouts, Investor Column

2. Click on the **Investor** you wish to view details for.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID ↑	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	<div>Janet Murphy</div> janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	<div>Janet Murphy</div> janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	<div>Janet Murphy</div> janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	<div>Janet Murphy</div> janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Dividend, Cash Payouts, Investor Select Example

✓ Action Complete: You will be redirected to the Investor Details page.

You will be [redirected to the Investor Details page](#) once you click an **Investor's Name**.

Using Cash Payouts Filters

To Filter Cash Payouts:

1. Locate the filter section above the table.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Dividend, Cash Payouts, Filter Location

How to: Filter by Status

1. Find and **CLICK** on the **Status** dropdown, located above the **Cash Payouts List** table.

Dividend Cash Payouts

Filter

Status
All

Sponsor Organization
All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH

Cash Payouts, Status Dropdown, Location

2. **SELECT** the **Status** you want to filter by from the dropdown.

Dividend Cash Payouts

Filter

Status
All

Sponsor Organization
All

All

Pending

Paid (Clearing Pending)

Voided & Replacement

Complete

Payable Amount Payment Type Payment Reference

2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
			Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH

Cash Payouts, Status Dropdown, Expanded

How to: Filter by Sponsor Organization

1. Find and **CLICK** on the **Sponsor Organization** dropdown.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	
5	1004	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 02, 2022	\$78.00	ACH	ACH	

Cash Payouts, Sponsor Organization Dropdown, Location

2.

SELECT

 the

Sponsor Organization

 you want to filter by from the dropdown.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

All

Community Investment Trust

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed

Cash Payouts, Sponsor Organization Dropdown, Expanded

How to: Search for Cash Payout Information

1. Find and

CLICK

 on the

Search

 field.

Dividend Cash Payouts

Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com	May 11, 2021	\$56.00	ACH	ACH	Completed

2. **TYPE** in the **Name of the Investor** you want to see **Cash Payouts** for.

Dividend Cash Payouts

Filter

Status: All Sponsor Organization: All

Jan

ID	Dividend ID	CIT Corporation	Investor ↑	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed
5	1004	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 02, 2022	\$78.00	ACH	ACH	Completed
6	1005	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 19, 2023	\$80.00	ACH	ACH	Completed
7	1006	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 17, 2024	\$25.00	ACH	ACH	Completed
12	1007	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	February 28, 2025	\$0.84	ACH	ACH	Completed

Items per page: 10 1 - 8 of 8

Cash Payouts, Search Bar, Search Example

- ✓ Action Complete: The table will filter as the options are selected

The table will automatically refresh to show only items matching your selected filters.

How To: View More Information

1. **CLICK** on the name of the **Investor** you want to view more information for.

Investments

Filter

Status: Open CIT Corporation: All Search:

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2853	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT		2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruise tomcruise@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT		2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT		2025	February 15, 2025	\$50.00	Open
1104	East Portland CIT		2025	February 15, 2025	\$50.00	Open
1089	East Portland CIT		2024	July 15, 2024	\$10.00	Open (Payment Processing)
1022	East Portland CIT		2024	July 15, 2024	\$100.00	Open (Payment Processing)
1053	East Portland CIT		2024	July 15, 2024	\$50.00	Open (Payment Processing)


Items per page: 10 1 - 10 of 93

Cash Payouts, Investor Click

✔ Action Complete: You Will Be Redirected to the Investor Details Page


See [View Investor Details](#) for more information.

Transaction

The following  can be found in the Transaction category:

- [Directives](#)
- [Complete Transactions](#)

Directives

The  section provides tools for managing transaction directives within the system.

[Directives Homepage Location](#)

[Directives List Table Overview](#)

[Filtering the Directives List](#)



[Directives Homepage Location](#)

To Find the Directives List Homepage:

1. Locate the primary sidebar to the left of the page.

Don't see the sidebar?

See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **Transaction** category.
3. Select  from the dropdown.

COMMUNITY INVESTMENT TRUST

☰

🏠 My Accounts

🏠 Dashboard

👤 Profile

👤 User

🏠 Account

📄 Document

🏷️ Offering

🏷️ Investment

📺 Dividend

↔️ Transaction

➡️ Directives

➡️ Complete Transactions

⚙️ Setting

Directives

Filter

Status

All

Search Transaction ID

Transaction ID	CIT Corporation	Effect Date
1014	East Portland CIT	January 2025
1013	East Portland CIT	January 2025
1012	East Portland CIT	January 2025
1010	East Portland CIT	January 2025
1011	East Portland CIT	January 2025

Directives Homepage

Directives List Table Overview

The **Directives List** table has the following **columns** :

- **Transaction ID** : The unique identifier for the transaction
- **CIT Corporation** : The corporation associated with the transaction
- **Effective Date** : The date when the transaction becomes effective
- **Total Investment Amount** : The total amount invested in the transaction
- **Total Shares** : The total number of shares involved in the transaction
- **Number Of Investments** : The count of individual investments in the transaction
- **Submitted On** : The date when the transaction was submitted
- **Submitted By** : The user who submitted the transaction
- **Status** : The current status of the transaction (e.g., Pending, Rejected/Canceled, Complete)
- **Action** : Available actions for the transaction (view details)

Directives

Filter

Status

All

Sponsor Organization

All

Search Transaction ID



Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Items per page: 10 1 - 5 of 5

Directives Table Filter Section with Status and Sponsor Organization filters

Status Filter Dropdown

1. Find and Click on the **Status** dropdown to filter by status.

Directives

Filter

Status

All

Sponsor Organization

All

Search Transaction ID



Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Items per page: 10 1 - 5 of 5

Status dropdown in the Directives filter section

2. Select from available status options:

Directives

Filter

Status

All

All

Pending

Complete

Rejected/Canceled

Sponsor Organization

All

			Investment	Total Shares	Number Of Investments
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0

Status dropdown expanded showing All, Pending, Complete, and Rejected/Canceled options

Sponsor Organization Filter Dropdown

1. Find and Click on the Sponsor Organization dropdown to filter by organization.

Directives

Filter

Status

All

Sponsor Organization

All

Search Transaction ID

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Items per page: 10 1 - 5 of 5

Sponsor Organization dropdown in the filter section

2. Select from available organization options:

Sponsor Organization

All

All

Community Investment Trust

	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status
T	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	<button>Pending</button>
T	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	<button>Rejected</button>
T	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	<button>Rejected</button>
T	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	<button>Rejected</button>
T	January 29,	\$60.00	3.00407	3	01/29/2025	John Service	<button>Complete</button>

Sponsor Organization dropdown expanded showing All and Community Investment Trust options

How to Search for Directives

To search for specific directives, use the search bar at the top of the table:

Filter

Status

All

Sponsor Organization

All

Search Transaction ID

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	<button>Pending</button>	<button></button>
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	<button>Rejected/Canceled</button>	<button></button>
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	<button>Rejected/Canceled</button>	<button></button>
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	<button>Rejected/Canceled</button>	<button></button>
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	<button>Complete</button>	<button></button>

Items per page: 10

1 - 5 of 5

Search Bar for Transaction ID

Enter a Transaction ID or other search terms to filter the results.

Directives

Filter

Status

All

Sponsor Organization

All

1013

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1013	CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	

Items per page: 10 1 - 1 of 1

Search Bar for Transaction ID with search results

How to Use Wildcard (*) to Search for Multiple Transaction IDs

Viewing Directive Details

To view detailed information about a directive:

- 1. Locate the eye icon in the Action column for the directive you wish to view.

Directives

Filter

Status

All

Sponsor Organization

All

Search Transaction ID

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025			
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Items per page: 10 1 - 5 of 5

Eye icon in the Action column for viewing directive details

- 2. Click the eye icon to open the Directive Details screen.

Directives

Filter







Status

All

Sponsor Organization

All

Search Transaction ID

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service		
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Cancelled	
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Cancelled	
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Items per page: 10

1 - 5 of 5

Directive Details Screen showing comprehensive information about Transaction ID 1014 including Info and Investments sections

Directive Details Sections

The Directive Details screen is divided into two main sections:

Info Section

The Info section displays key information about the directive:

- CIT Corporation
- Number of Investments
- Total Shares
- Total Investment Amount
- Effective Date
- Submitted On
- Submitted By
- Status
- Additional Instructions (if any)

Investments Section

The Investments section lists all individual investments associated with the directive:

- Investor (name and contact information)
- Offering Year
- Shares
- Amount
- Investment Date

Complete Transactions

The  section covers everything listed in the **Table of Contents** below:

Contents

Complete Transactions

- [Complete Transactions Homepage Location](#)
- [Complete Transactions List Table](#)
- [Columns: Complete Transactions List Table](#)
- [Using Complete Transactions Filters](#)

Complete Transactions Homepage Location

To Find the Complete Transactions List Homepage:

1. Locate the primary sidenav to the left of the page.

Don't see the sidenav?

See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the **Transaction** category.
3. Select **Complete Transactions** from the dropdown.

Complete Transactions

Filter

Sponsor Organization

All

Search Transaction ID

Q

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	🔗
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	🔗
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	🔗

Items per page: 10 1 - 3 of 3 < >

Complete Transactions Homepage

Complete Transactions List Table

The **Complete Transactions List** table is what first appears on the homepage of the **Complete Transactions** section.

Complete Transactions

Filter

Sponsor Organization

All

Search Transaction ID

Q

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	🔗
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	🔗
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	🔗

Items per page: 10 1 - 3 of 3 < >

Columns: Complete Transactions List Table

The `Complete Transactions List` table has the following `columns` :

- `Transaction ID` : The unique identifier for the transaction
- `Date` : The date when the transaction occurred
- `Investor` : The investor associated with the transaction
- `Organization` : The organization associated with the transaction
- `Amount` : The amount of the transaction
- `Transaction Type` : The type of transaction
- `Status` : The current status of the transaction
- `Action` : Available actions for the transaction

Using Complete Transactions Filters

To Filter Complete Transactions:

- Locate the filter section at the top of the table.

Complete Transactions

Filter

Sponsor Organization

All

Search Transaction ID

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page:

10

1 - 3 of 3

Complete Transactions Table Filter Section Highlighted

- Click on the Sponsor Organization dropdown to filter by organization.

Filter

Sponsor Organization

All

Search Transaction ID

Q

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page:

10

0 of 0

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Complete Transactions Status Dropdown Location

3. Select the Sponsor Organization you wish to see the transactions for.

Complete Transactions

Filter

Sponsor Organization

All

Search Transaction ID

Q

All

Community Investment Trust

ID

Type

Corporation

Effective Date

Process Date

Total Issued Shares

Total Canceled Shares

1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906

Items per pag

Sponsor Organization, Dropdown Expanded

4. Select the

Search Transaction ID

 field.

John Doe (John s)

Filter

Sponsor Organization

All

Search Transaction ID

Q

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page: 10 0 of 0 < >

Search Transaction ID Field Location

How to Use Wildcard (*) to Search for Multiple Transaction IDs

Billing

The following  are included in the Billing category:

- [Invoices](#)
- [Payments](#)

Invoices


The  section covers everything listed in the **Table of Contents** below:

Table of Contents

- [Invoices Homepage](#)
- [Columns: Invoices List Table](#)
- [How to Download Invoices in PDF](#)
- [How to Add an Invoice](#)
- [How to Add New Line Items](#)

Hover for Page Preview

Hover over the links for a page preview.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:48 PM	Active	View Edit Delete
Carl Podayn	cpodayn@transferonline.com	7	12/18/2024 @ 11:47 AM	Active	View Edit Delete
John Doe	dievsey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	View Edit Delete
John Service	ck@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	View Edit Delete
John Via	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	View Edit Delete
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:18 AM	Active	View Edit Delete
Pankaj CIT	pankaj.joshi@techaheadcorp.com	0		Active on Pending	View Edit Delete

Staff List Homepage

Features: Staff List Table

Filter by Status

View Staff Details and Other Remaining Sections

Staff Homepage #

Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

Hover for Page Preview Click to show

Invoices Homepage

The **Invoices** section opens up to the **Invoices List** table:

Invoices List

Company Type

Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	View
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$103.87	\$396.13	View
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	View
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	View
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	View
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	View
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	View
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	View
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	View
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	View

Download Invoices in PDF

Items per page: 10 1 - 10 of 19

Billing, Invoices, Homepage

Columns: Invoices List Table

Invoices List

Company Type

Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount ↑	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Download Invoices in PDF

Items per page: 10

1 - 10 of 19

Billing, Invoices, Columns Explained

The **Invoices List** table summarizes key details for each **Invoice**, including:

- **Invoice Number**
- **Bill To**
- **Type**
- **Invoice Date**
- **Amount**
- **Status**
- **Action**

How to Download Invoices in PDF

To download invoices in PDF format:

1. Select the checkboxes next to the invoices you want to download:

Invoices List

Company Type

Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page: 10 1 - 10 of 19

Download Invoices in PDF

Billing, Invoices, Selecting Invoices

2. Click the **Download Invoices in PDF** button:

Invoices List

Company Type

Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input checked="" type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page: 10 1 - 10 of 19

Download Invoices in PDF

Billing, Invoices, Download PDF Button

How to Add an Invoice

To add a new invoice:

1. Click the **Add New Invoice** button (plus sign):

Invoices List

Company Type

Search by Invoice No. or Bill to

+

	Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Download Invoices in PDF

Items per page: 10

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Billing, Invoices, Add New Invoice Button

2. Fill out the invoice form:

Add Invoice

Company Type*

Date*

Invoice Type*

Note to Biller*

Internal Note*

Line Items

+

1

Item Type*

Description*

Amount*

Total amount \$0.00

Save Changes

Billing, Invoices, Add Invoice Form

Note

All fields are required for creating a new invoice.

Add Invoice

Company Type*	Date*
Invoice Type*	Note to Biller*
Internal Note*	

Line Items +

1	Item Type*	Description*	Amount*

Total amount \$0.00

Save Changes

Billing, Invoices, All Fields Required

3. Complete all required information (example):

Add Invoice

Company Type*	Company Accounts*
Sponsor Organizations	Community Investment Trust
Date*	Invoice Type*
3/13/2025	Service
Note to Biller*	Internal Note*
Sponsorship fee for the annual community workshop.	Please direct any questions about this invoice to accounts@communitytrust.org. Payment is due within 30 days.

Line Items +

1	Item Type*	Description*	Amount*
	Post	Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	\$500

Total amount \$500.00

Save Changes

Billing, Invoices, Example of Filled Out Form

How to Add New Line Items

You can add multiple line items to an invoice:

1. Click the **Add Line Item** button:

Add Invoice

Company Type*	Company Accounts*
Sponsor Organizations	Community Investment Trust
Date*	Invoice Type*
3/13/2025	Service
Note to Biller*	Internal Note*
Sponsorship fee for the annual community workshop.	Please direct any questions about this invoice to accounts@communitytrust.org. Payment is due within 30 days.

Line Items +

1	Item Type*	Description*	Amount*
	Post	Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	\$500

Total amount \$500.00

Save Changes

Billing, Invoices, Add Line Item Button

2. Fill out the details for the new line item:

Add Invoice

Company Type* Sponsor Organizations Company Accounts* Community Investment Trust

Date* 3/13/2025 Invoice Type* Service

Note to Biller* Sponsorship fee for the annual community workshop. Internal Note* Please direct any questions about this invoice to accounts@communitytrust.org. Payment is due within 30 days.

Line Items

1	Item Type* Other	Description* Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	Amount* \$500
2	Item Type* Service	Description* Fee for renting a promotional booth at the Spring Community Expo.	Amount* \$750

Total amount **\$1,250.00**

[Save Changes](#)

Billing, Invoices, Second Line Item Added

3. The total will automatically update to reflect all line items:

Add Invoice

Company Type* Sponsor Organizations Company Accounts* Community Investment Trust

Date* 3/13/2025 Invoice Type* Service

Note to Biller* Sponsorship fee for the annual community workshop. Internal Note* Please direct any questions about this invoice to accounts@communitytrust.org. Payment is due within 30 days.

Line Items

1	Item Type* Other	Description* Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	Amount* \$500
2	Item Type* Service	Description* Fee for renting a promotional booth at the Spring Community Expo.	Amount* \$750

Total amount **\$1,250.00**

[Save Changes](#)

Billing, Invoices, Total Updated with New Line Item

Payments

The **Payments** section provides tools for viewing and managing payment records within the system.

[Features: Payments](#)

[Layout: Payments Homepage](#)

[Filtering Payments](#)

- [Step 1: Locate the Filter Button](#)
- [Step 2: Select Filter Criteria](#)

[Searching Payments](#)

- [Step 1: Locate the Search Bar](#)
- [Step 2: Enter Search Terms](#)

[Additional Features](#)

Features: Payments

- View payment records
- Search for specific payment entries
- Filter payments by company type and other criteria
- View detailed payment information
- Add payment credits to accounts

Layout: Payments Homepage

The Payments homepage displays a comprehensive table of all payment records in the system.

Payment Credit List

Company Type

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00	\$5.63	\$316.37	
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00	\$103.41	\$352.59	
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$1,223.00	\$4.21	\$1,218.79	
9	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Items per page: 10

1 - 10 of 14

Payments Homepage showing the payment records table

Filtering Payments

The system allows you to filter payment records by company type and other criteria.

Step 1: Locate the Filter Button

Find the filter button in the Payments table interface.

Payment Credit List

Company Type

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00	\$5.63	\$316.37	
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00	\$103.41	\$352.59	
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$1,223.00	\$4.21	\$1,218.79	
9	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Items per page: 10 1 - 10 of 14

Filter button location in the Payments table

Step 2: Select Filter Criteria

Click the filter button to expand the available filtering options.

Payment Credit List

Company Type

All
Sponsor Organizations
CIT Corporations

Search by Billing name or Reference No

Sec

			Type	Reference No.	Amount
1	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00
2	02/06/2025	Shahzad	Cash	12033	\$120.00
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00

Expanded filter options for the Payments table

Searching Payments

You can search for specific payment records using the search functionality.

Step 1: Locate the Search Bar

Find the search bar at the top of the Payments table.

Payment Credit List

Company Type

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00	\$5.63	\$316.37	
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00	\$103.41	\$352.59	
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$1,223.00	\$4.21	\$1,218.79	
9	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Items per page: 10
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Search bar location in the Payments interface

Step 2: Enter Search Terms

Type your search terms in the search bar. The table will automatically filter to show matching results.

Note

The system searches across multiple columns in the Payments table to find matching records.

Payment Credit List

Company Type
All

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00	\$5.63	\$316.37	
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00	\$103.41	\$352.59	
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$1,223.00	\$4.21	\$1,218.79	
9	01/27/2025	East Portland CIT	AMEX	zxdur'f	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Items per page: 10
1 - 10 of 14

Searchable columns in the Payments table

Additional Features

The Payments section includes additional features for managing payment information:

- View detailed payment information

- Add payment credits to accounts

Viewing Payment Details

The **Viewing Payment Details** section explains how to access and understand detailed information about individual payment records.

[Overview: Payment Details](#)

[Steps: Accessing Payment Details](#)

- [Step 1: Locate the View Details Button](#)
- [Step 2: View Payment Details Screen](#)

[Understanding the Payment Details](#)

- [Quick Information Section](#)
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[Summary](#)











Overview: Payment Details

The Payment Details screen provides comprehensive information about a specific payment, including transaction details, payment status, and associated account information.

Steps: Accessing Payment Details

Step 1: Locate the View Details Button

Find the “View Details” button in the payment record row you wish to examine.

Payment Credit List								
Company Type All			Search by Billing name or Reference No					
ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdurf	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00	\$5.63	\$316.37	
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00	\$103.41	\$352.59	
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$1,223.00	\$4.21	\$1,218.79	
9	01/27/2025	East Portland CIT	AMEX	zxdurf	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	
Items per page: 10 1 - 10 of 14								

Location of the View Details button in the Payments table

Step 2: View Payment Details Screen

After clicking the View Details button, a new screen will open displaying all available information about the

selected payment.

Payment Credit Details

Date11/27/2025

Payment Type1AMEX

Reference No.1zxduf

Amount1\$1,000

Paid1\$1,000

Balance1\$0

Note1Credited

	Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$159	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$1103.87	\$396.13

Items per page: 101 - 2 of 2

Payment Details screen showing comprehensive payment information

Understanding the Payment Details

Quick Information Section

The top section of the Payment Details screen provides essential information about the payment at a glance.

Payment Credit Details

Date11/27/2025

Payment Type1AMEX

Reference No.1zxduf

Amount1\$1,000

Paid1\$1,000

Balance1\$0

Note1Credited

	Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$159	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$1103.87	\$396.13

Items per page: 101 - 2 of 2

Quick information section highlighted in the Payment Details screen

Detailed Columns

The Payment Details screen is organized into columns containing specific categories of information.

Date*

1/27/2025

Payment Type*

AMEX

Reference No.*

zxdurf

Amount*

\$1,000

Paid*

\$1,000

Balance*

\$0

Note*

Credited

	Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$159	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$1103.87	\$396.13

Items per page:

10

1 - 2 of 2

Columns of information in the Payment Details screen

Summary

The Payment Details screen allows you to:

1. Access comprehensive information about individual payment records
2. View payment transaction details
3. See associated account information
4. Check payment status and history

Adding Payment Credits

The **Adding Payment Credits** section explains how to add payment credits to company accounts in the system.

[Overview: Payment Credits](#)

[Steps: Adding Payment Credits](#)

- [Step 1: Locate the Add Payment Credit Button](#)
- [Step 2: Access the Add Payment Credit Form](#)
- [Step 3: Select Company Type](#)
- [Step 4: Select Company Account](#)
- [Step 5: Select Payment Type](#)
- [Step 6: Fill Out Fields and Save](#)

[Summary](#)

Overview: Payment Credits

Payment credits allow you to add funds to company accounts in the system. This feature is essential for maintaining payment balances and facilitating transactions within the application.

Steps: Adding Payment Credits

[Step 1: Locate the Add Payment Credit Button](#)

Find the “Add Payment Credit” button in the Payments interface.

Payment Credit List

Company Type

Search by Billing name or Reference No

+

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdurf	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	

Location of the Add Payment Credit button

Step 2: Access the Add Payment Credit Form

After clicking the Add Payment Credit button, you'll see the payment credit form.

Add Payment Credit

Company Type*

Payment Type*

Date*

Reference*

Amount*

Note*

Save Changes

The Add Payment Credit form

Note

All fields in the Add Payment Credit form are required.

Add Payment Credit

Company Type*

Payment Type*

Date*

Reference*

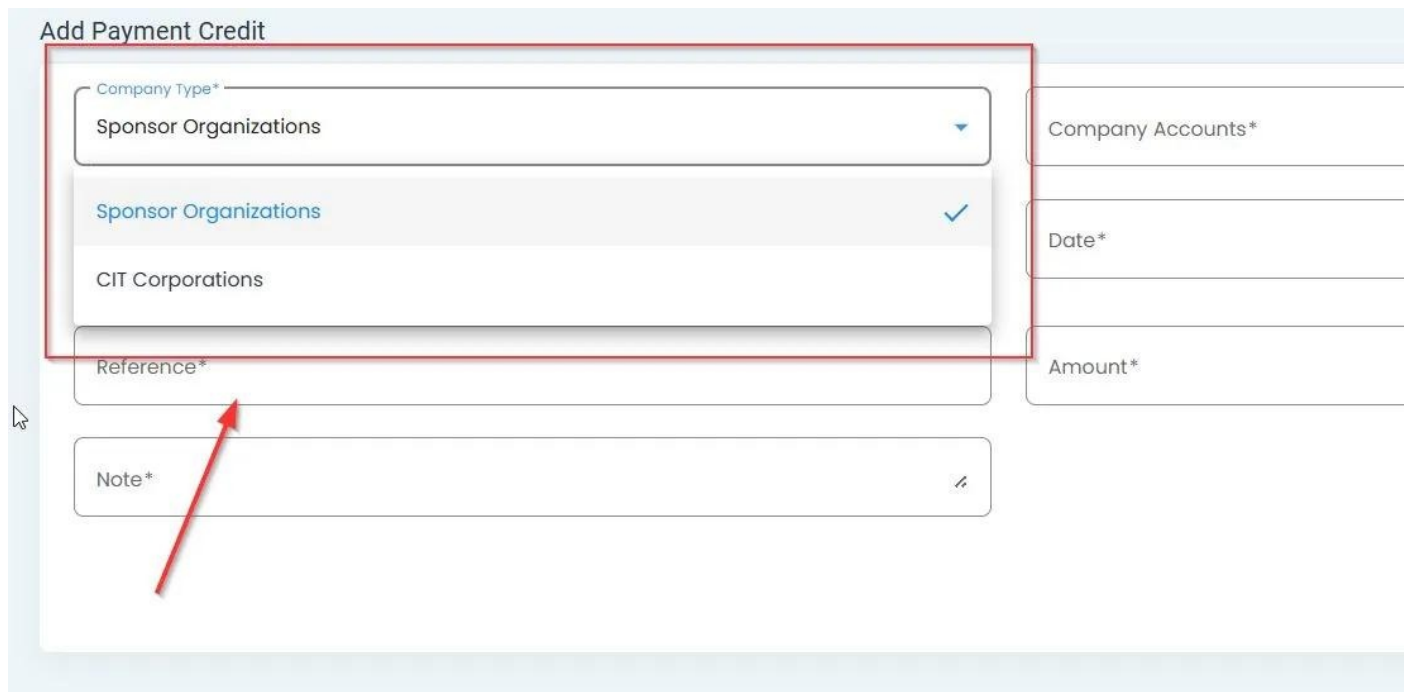
Amount*

Note*

Save Changes

[Step 3: Select Company Type](#)

Choose the appropriate company type from the dropdown menu.

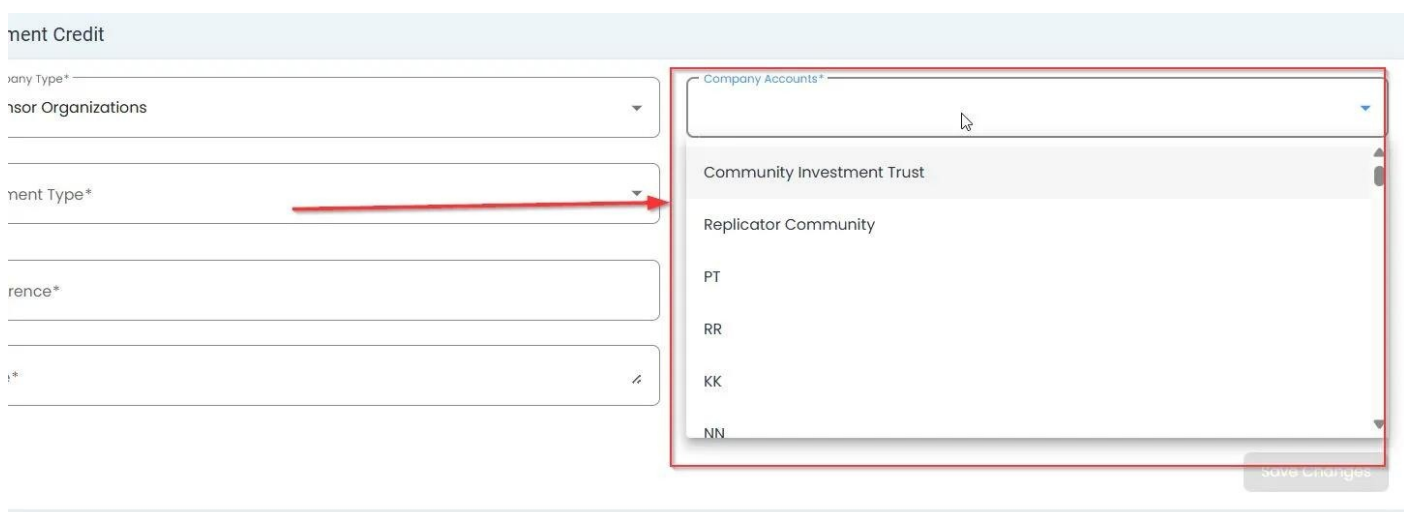


The screenshot shows the 'Add Payment Credit' form. The 'Company Type*' dropdown menu is open, displaying three options: 'Sponsor Organizations' (selected with a blue checkmark), 'Sponsor Organizations' (highlighted in grey), and 'CIT Corporations'. A red box highlights the dropdown menu and the 'Reference*' and 'Note*' fields below it. A red arrow points to the 'Note*' field. To the right of the dropdown menu are three input fields: 'Company Accounts*', 'Date*', and 'Amount*'.

Selecting the company type in the Add Payment Credit form

[Step 4: Select Company Account](#)

Select the specific company account to which you want to add the payment credit.



The screenshot shows the 'Add Payment Credit' form. The 'Company Accounts*' dropdown menu is open, displaying a list of accounts: 'Community Investment Trust' (selected with a blue checkmark), 'Replicator Community', 'PT', 'RR', 'KK', and 'NN'. A red box highlights the dropdown menu. A red arrow points to the 'Company Type*' dropdown menu. At the bottom right of the form is a 'Save Changes' button.

Selecting the company account in the Add Payment Credit form

[Step 5: Select Payment Type](#)

Choose the appropriate payment type from the available options.

The screenshot shows the 'Add Payment Credit' form. The 'Company Type*' dropdown is set to 'Sponsor Organizations'. The 'Company Accounts*' dropdown is set to 'Community Investment Trust'. The 'Payment Type*' dropdown is open, showing a list of payment methods: Check, VISA, AMEX, MASTERCARD, DISCOVER, and Cash. A red arrow points from the 'Save Changes' button to the 'Payment Type' dropdown.

Selecting the payment type in the Add Payment Credit form

[Step 6: Fill Out Fields and Save](#)

Complete all the required fields in the form and click the Save button to add the payment credit.

The screenshot shows the 'Add Payment Credit' form with all fields filled out. The 'Company Type*' dropdown is set to 'Sponsor Organizations'. The 'Company Accounts*' dropdown is set to 'Community Investment Trust'. The 'Payment Type*' dropdown is set to 'VISA'. The 'Date*' field is set to '3/19/2025'. The 'Reference*' field is set to 'AMEX Transaction #ZX1234'. The 'Amount*' field is set to '\$1,000'. The 'Note*' field is set to 'Partial payment toward Setup Fee invoice #1002'. A red arrow points to the 'Save Changes' button.

Filling out the fields and clicking Save to complete the process

[Summary](#)

The process of adding payment credits involves:

1. Accessing the Add Payment Credit form
2. Selecting the company type and account
3. Choosing the payment type
4. Completing all required fields
5. Saving the payment credit information

This functionality allows administrators to manage company account balances effectively within the system.

Settings

This following Section(s) is included in the ⚙️ Settings category:

- Receive Notifications

Proxy

Welcome to the Proxy section.