



COMMUNITY
INVESTMENT
TRUST

Contents

1	My Accounts Category	3
2	Table of Contents	5
2.1	My Accounts	5
2.1.1	Managing Different Accounts	5
2.1.1.1	Identifying the Current Account	6
2.2	Dashboard	6
2.2.1	Dashboard Tiles	7
2.2.1.1	Dashboard Tables	7
2.2.1.1.1	Dashboard Table Locations	7
2.3	Profile	13
2.3.1	Profile Location	13
2.3.2	Profile Information	13
2.3.3	Upload Logo	13
2.3.3.1	Name and Contact Information	14
2.3.3.1.1	Location: Name and Contact Information section	14
2.3.3.2	Primary Address	14
2.3.3.3	Mailing Address	16
2.3.3.3.1	Location: Mailing Address section	16
2.4	User	17
2.4.1	Users	18
2.4.1.1	User List Homepage	18
2.4.1.2	Columns: User List Table	19
2.4.1.3	Search and Filter Options	20
2.4.1.4	Status Options	20
2.4.1.5	View User Details and Other Remaining Sections	21
2.4.1.5.1	Users Homepage Location	21
2.4.2	Staff	23
2.4.2.1	Staff List Homepage	23
2.4.2.2	Features: Staff List Table	24
2.4.2.2.1	Columns: Staff List Table	24
2.4.2.3	Filter by Status	25
2.4.2.4	View Staff Details and Other Remaining Sections	26
2.4.2.4.1	Staff Homepage Location	26
2.5	Account	27
2.5.1	CIT Corporations List	27
2.5.1.1	Features	27
2.5.1.1.1	Location: CIT Corporations Section	27
2.5.1.2	CIT Corporations List Table	28
2.5.1.2.1	Table: CIT Corporations List	28
2.5.1.2.2	View CIT Corporation Details	29
2.5.2	Investors	36

2.5.2.1	Overview	37
2.5.2.2	Search Functionality	37
2.5.2.3	Investors Table	37
2.5.2.3.1	Table Columns	38
2.5.2.3.2	Action Column	38
2.6	Document	50
2.6.1	CIT Corporation Onboarding Documents	50
2.6.1.1	Features: CIT Corporation Onboarding	50
2.6.1.2	Location: CIT Corporation Onboarding	51
2.6.1.3	Table: Onboarding Documents List	51
2.6.1.3.1	CIT Onboarding Documents Table: Columns Explained	51
2.6.1.3.2	Status Filters for Onboarding Documents Table	54
2.6.1.3.3	Action: View More Details	54
2.6.1.3.4	Onboarding Document Details Page	55
2.6.1.4	Onboarding Documents Table	55
2.6.2	CIT Onboarding Documents Table: Columns Explained	56
2.6.3	CIT Corporation Offering	56
2.6.3.1	Features: CIT Corporation Offering	57
2.6.3.2	Offering Documents Table	57
2.6.3.2.1	CIT Offering Documents Table: Columns Explained	58
2.6.3.2.2	CIT Offering Status Filter	59
2.6.3.2.3	View More Details	60
2.6.4	Investor Documents	61
2.6.4.1	Table: Investor Documents	61
2.6.4.1.1	Table Columns Explained	61
2.6.4.1.2	Filter by CIT Corporation	63
2.6.4.1.3	How to Search Investor Documents	63
2.6.4.1.4	Actions: View Details and Download	64
2.6.5	View More Details: Documents	64
2.6.5.1	Layout Explanation	64
2.6.5.1.1	View Details: Tabs Explained	64
2.6.5.1.2	View Details: Cards Explained	66
2.6.5.2	Available Actions	66
2.7	Offering	66
2.7.1	Offerings	67
2.7.1.1	Location: Offerings	67
2.7.1.2	Table: Offerings List	67
2.7.1.3	Columns: Offerings List Table	67
2.7.2	Enrollments	70
2.7.2.1	Enrollments Homepage Location	70
2.7.2.2	Related Sections	72
2.7.2.2.1	Enrollments Table	72
2.8	Investment	79
2.8.1	Investments Homepage Location	80
2.8.2	Investments List Table Overview	81
2.8.3	Using Investments Filters	82
2.8.3.1	Investor Summary	84
2.8.3.2	Monthly and Quarterly Investment Summary	84
2.9	Communication	84
2.10	Dividend	84
2.10.1	Dividends	85
2.10.1.1	Dividends Homepage Location	85
2.10.1.2	Dividends List Table	85
2.10.1.3	Columns: Dividends List Table	85

2.10.1.4	Using Dividends Filters	88
2.10.1.5	How to: Filter by Status	88
2.10.1.6	How to: Filter by Sponsor Organization	88
2.10.1.7	How to: Filter by CIT Corporation	91
2.10.2	Cash Payouts	92
2.10.2.1	Cash Payouts Homepage Location	92
2.10.2.2	Cash Payouts List Table	92
2.10.2.3	Columns: Cash Payouts List Table	94
2.10.2.4	How to: View Details About the Investor for a Cash Payout	94
2.10.2.5	Using Cash Payouts Filters	96
2.10.2.6	How to: Filter by Status	96
2.10.2.7	How to: Filter by Sponsor Organization	97
2.10.2.8	How to: Search for Cash Payout Information	98
2.10.2.9	How To: View More Information	99
2.11	Transaction	100
2.11.1	Directives	100
2.11.1.1	Directives Homepage Location	100
2.11.1.2	Directives List Table Overview	100
2.11.1.3	Filtering the Directives List	102
2.11.1.3.1	How to Filter by Status or Sponsor Organization	102
2.11.1.3.2	Viewing Directive Details	105
2.11.2	Complete Transactions	109
2.11.2.1	Complete Transactions Homepage Location	110
2.11.2.2	Complete Transactions List Table	110
2.11.2.3	Columns: Complete Transactions List Table	111
2.11.2.4	Using Complete Transactions Filters	111
2.12	Billing	113
2.12.1	Invoices	115
2.12.1.1	Invoices Homepage	115
2.12.1.2	Columns: Invoices List Table	116
2.12.1.3	How to Download Invoices in PDF	116
2.12.1.4	How to Add an Invoice	118
2.12.1.5	How to Add New Line Items	118
2.12.2	Payments	121
2.12.2.1	Features: Payments	121
2.12.2.2	Layout: Payments Homepage	122
2.12.2.3	Filtering Payments	122
2.12.2.3.1	Step 1: Locate the Filter Button	122
2.12.2.3.2	Step 2: Select Filter Criteria	122
2.12.2.4	Searching Payments	122
2.12.2.4.1	Step 1: Locate the Search Bar	124
2.12.2.4.2	Step 2: Enter Search Terms	124
2.12.2.5	Additional Features	124
2.12.2.5.1	Viewing Payment Details	125
2.12.2.5.2	Adding Payment Credits	128
2.13	Settings	133
2.14	Proxy	133

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

Download the PDF

[Download PDF](#)

[Download HTML as PDF](#)

Chapter 1

My Accounts Category

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

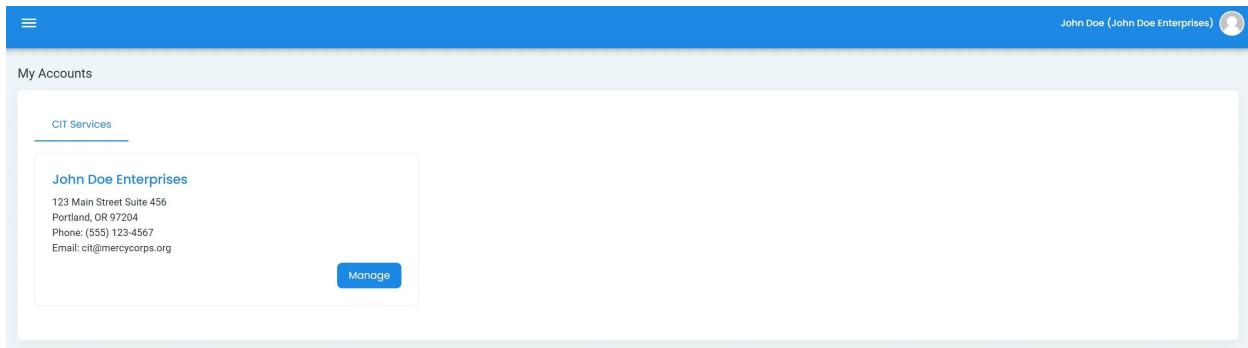


Fig. 1: CIT App, My Accounts Screen, Homepage

The main feature of the Page: My Accounts Page is that it allows you *Manage Different Accounts*

Note

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

For more on navigation and the primary sidebar, see General Sidebar Navigation page.

Chapter 2

Table of Contents

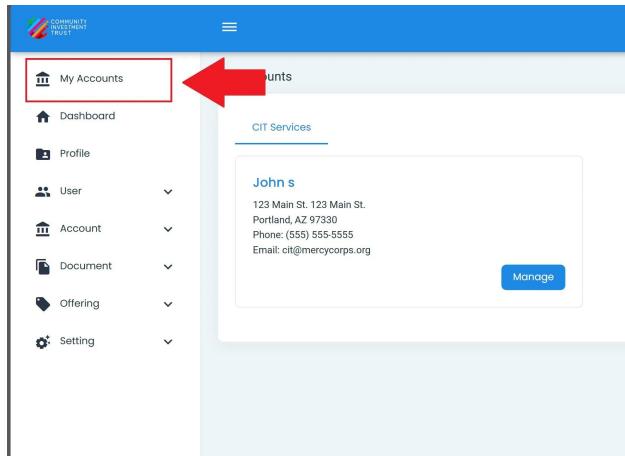
2.1 My Accounts

2.1.1 Managing Different Accounts

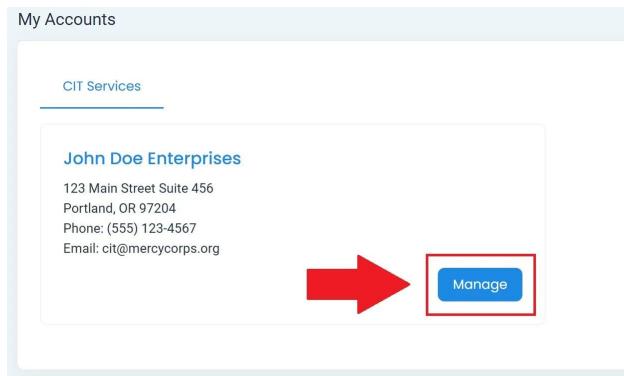
Managing accounts allows you to quickly navigate between the homepages of different accounts.

To **Manage an Account**:

1. Go to the My Accounts Category: account_balance 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.



2.1.1.1 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., Item: ((Option: {current account being managed}Item:)).

It is:

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

2.2 Dashboard

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

2.2.1 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.

Dashboard Tiles:

Below is a list of the main tiles and their descriptions (in PDF format):

- **Sponsorship Organizations:** Provides the number of Sponsorship Organizations.
- **CIT Corporations:** Provides the number of CIT Corporations.
- **Pending CIT Corporations:** Provides the number of CIT Corporations going through the Onboarding Process.
- **Offering Year 2010:** Provides details for specific Offering Year with Year filter set for 2010.
- **Offering Year 2025:** Provides details for specific Offering Year with Year filter set for 2025.
- **Onboarding Documents:** Provides number of Onboarding Documents pending for approval from a specific CIT Corporation.
- **Offering Documents:** Provides number of Offering Documents pending for approval from a specific CIT Corporation.

2.2.1.1 Dashboard Tables

The Section: 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*

2.2.1.1.1 Dashboard Table Locations

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

CIT Corporation Summary Table

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

- *Location: CIT Corporation Summary Table*
- *Columns: CIT Corporation Summary Table*

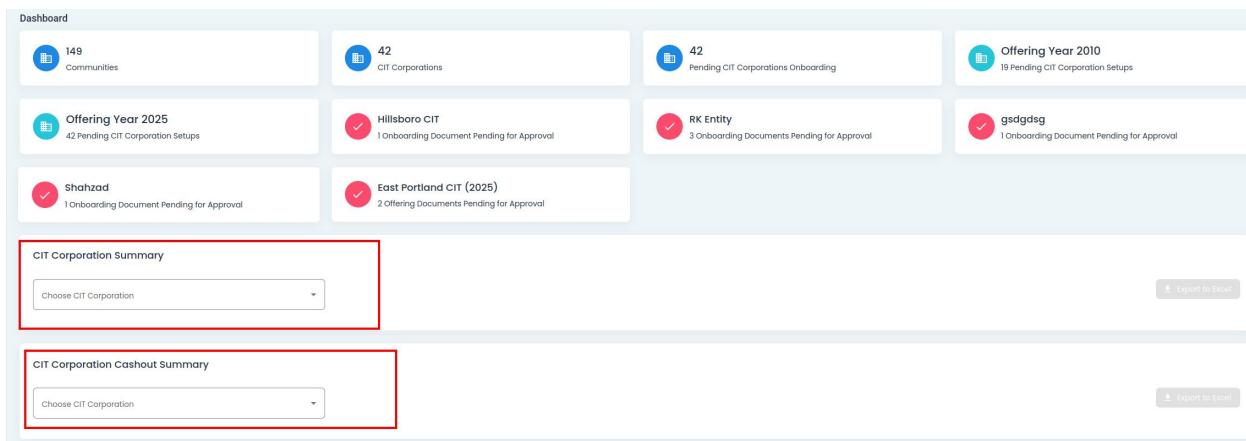


Fig. 1: Dashboard, Main Tables

Location: CIT Corporation Summary Table

The Table: CIT Corporation Summary table is the second table on the *Dashboard*.

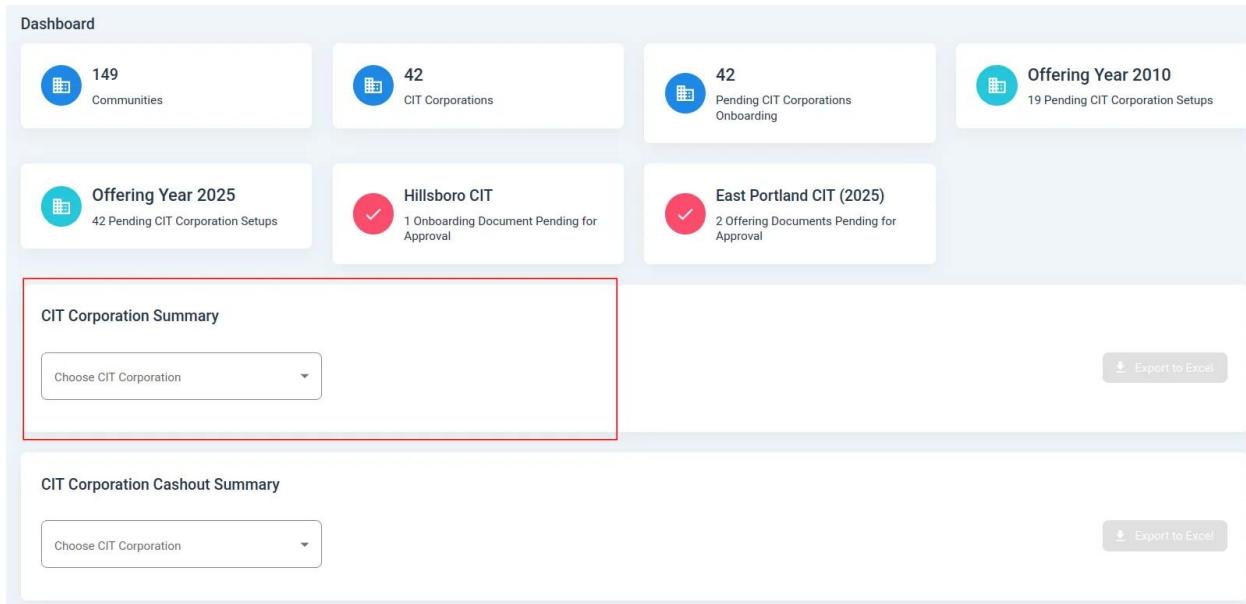


Fig. 2: Dashboard, CIT Corporation Summary Table Location

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									

Fig. 3: Dashboard, CIT Corporation Summary Table Columns Explained

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

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

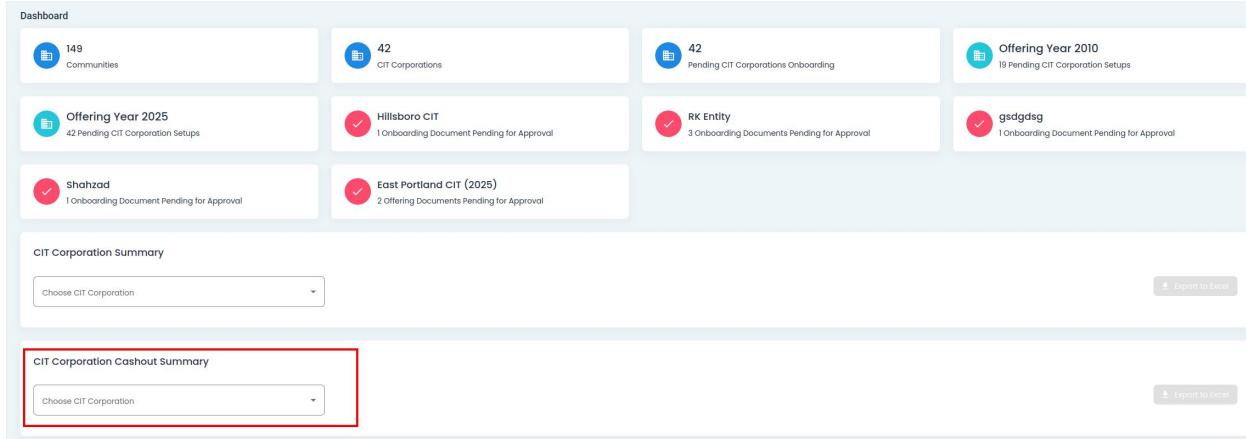
CIT Corporation Cashout Table

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

- *Location: CIT Corporation Cashout Table*
- *Columns: CIT Corporation Cashout Table*

Location: CIT Corporation Cashout Table

The Table: CIT Corporation Cashout table is the first table on the *Dashboard*:



The screenshot shows the CIT Services Dashboard. At the top, there are several status boxes: 'Dashboard' (149 Communities), 'CIT Corporations' (42), 'Pending CIT Corporations Onboarding' (42), 'Offering Year 2010' (19 Pending CIT Corporation Setups), 'Offering Year 2025' (42 Pending CIT Corporation Setups), 'Hillsboro CIT' (1 Onboarding Document Pending for Approval), 'RK Entity' (3 Onboarding Documents Pending for Approval), 'Shahzad' (1 Onboarding Document Pending for Approval), and 'East Portland CIT (2025)' (2 Offering Documents Pending for Approval). Below these is a 'CIT Corporation Summary' section with a dropdown menu 'Choose CIT Corporation' and an 'Export to Excel' button. The 'CIT Corporation Cashout Summary' section is highlighted with a red box. It also has a dropdown menu 'Choose CIT Corporation' and an 'Export to Excel' button.

Fig. 4: Dashboard, CIT Corporation Cashout Table Location

Columns: CIT Corporation Cashout Table



The screenshot shows the 'CIT Corporation Cashout Summary' table on the dashboard. The table has the following columns and data:

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%	8,381	\$12856	\$35.00	\$93.58

Fig. 5: Dashboard, CIT Corporation Cashout Table Columns Explained

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

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



Fig. 6: Dashboard, CIT Corporation Summary Section

Step 2: Click Dropdown and Select CIT Corporation

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

Fig. 7: Dashboard, CIT Corporation Summary Dropdown Expanded

Table Expands

The table will expand to show the CIT Corporation details.



The screenshot shows a dashboard titled 'CIT Corporation Summary'. At the top, there is a dropdown menu labeled 'Choose CIT Corporation' with 'East Portland CIT' selected. To the right of the dropdown is a blue button labeled 'Export to Excel'. The main area contains a table with the following data:

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

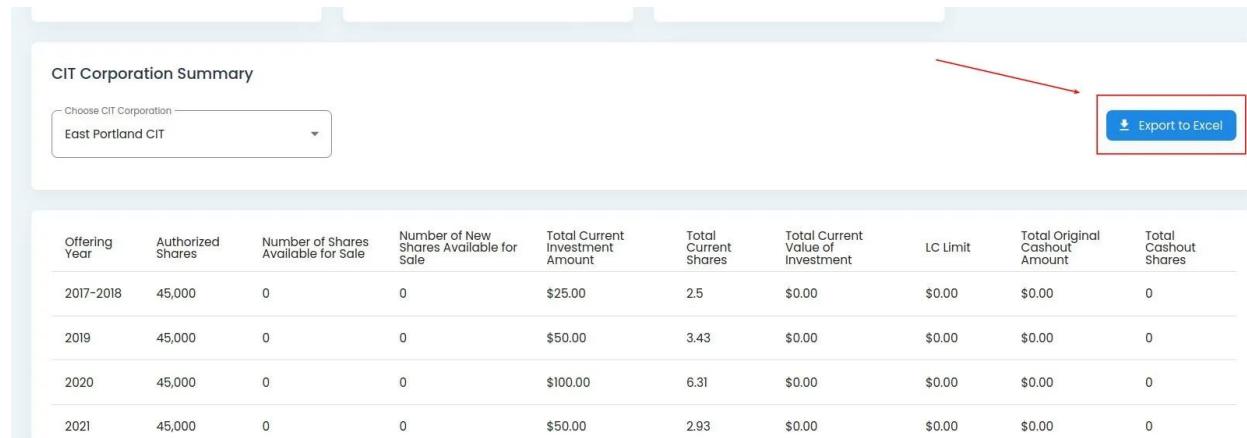
Fig. 8: Dashboard, CIT Corporation Summary Table Expanded

How to Export Table

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

To do so:

Step 1: Find and Click the *Export to Excel* button



The screenshot shows the same dashboard as Fig. 8. A red arrow points from the text 'To do so:' to the 'Export to Excel' button. The table data is identical to Fig. 8.

Fig. 9: Dashboard, CIT Corporation Summary Table Export Button Location

Export File Successfully Downloaded

The Green Option: Excel file will be downloaded to your default download location.

2.3 Profile

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

Table of Contents

- *Profile Location*
- *Profile Information*
- *Upload Logo*

2.3.1 Profile Location

The Page: Profile page is the third item listed in the Item: Primary Sidenavigation menu.

Don't see the Primary Sidenavigation menu?

See How to Toggle the Primary Sidenavigation menu for more information.

2.3.2 Profile Information

The Section: Profile Information 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

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

2.3.3 Upload Logo

To Upload:

1. Find the Option: Upload Logo section.
2. Click the *Upload Logo* button.
3. Select the logo (.png) file you want to upload.
4. File explorer dialog will open.

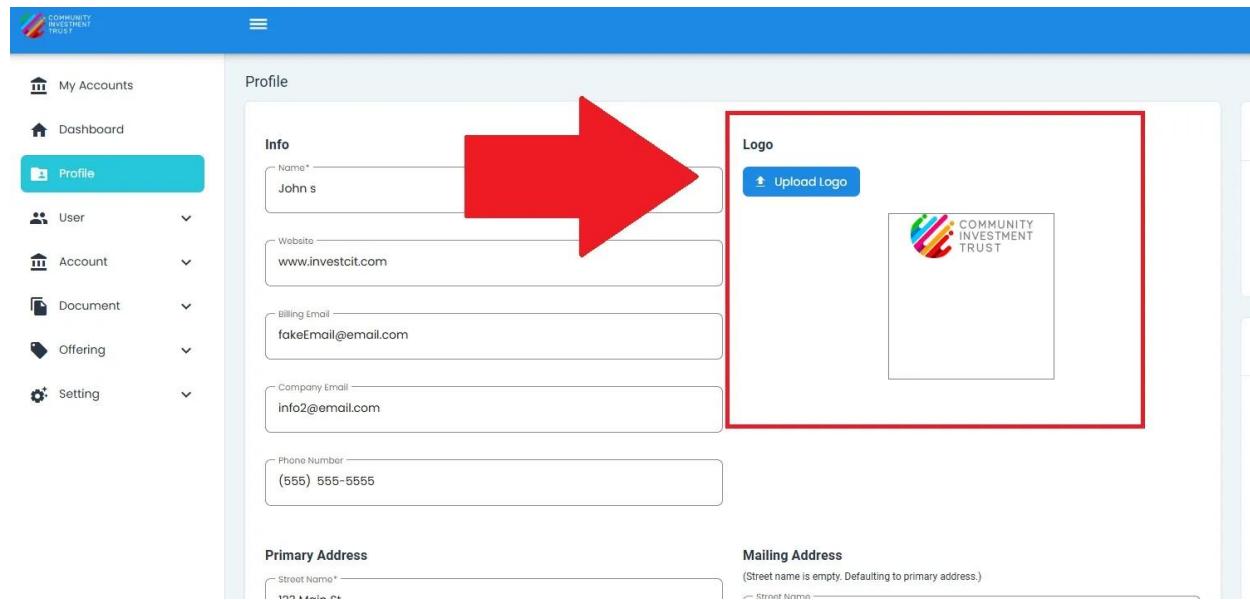


Fig. 10: Upload Logo Location

2.3.3.1 Name and Contact Information

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

2.3.3.1.1 Location: Name and Contact Information section

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

The following fields can be edited:

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

2.3.3.2 Primary Address

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

Note

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

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

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



Primary Address

Street Name*
123 Main St.

Suite/Apt Number
123 Main St.

City*
Portland

State*
Arkansas

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

Street Name
97330

Suite/Apt Number

City
Scottsdale

State
Wyoming

Fig. 11: Name and Contact Information Location

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



Primary Address

Street Name*
123 Main St.

Suite/Apt Number
123 Main St.

City*
Portland

State*
Arkansas

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

Street Name
97330

Suite/Apt Number

City
Scottsdale

State
Wyoming

Fig. 12: Primary Address Location

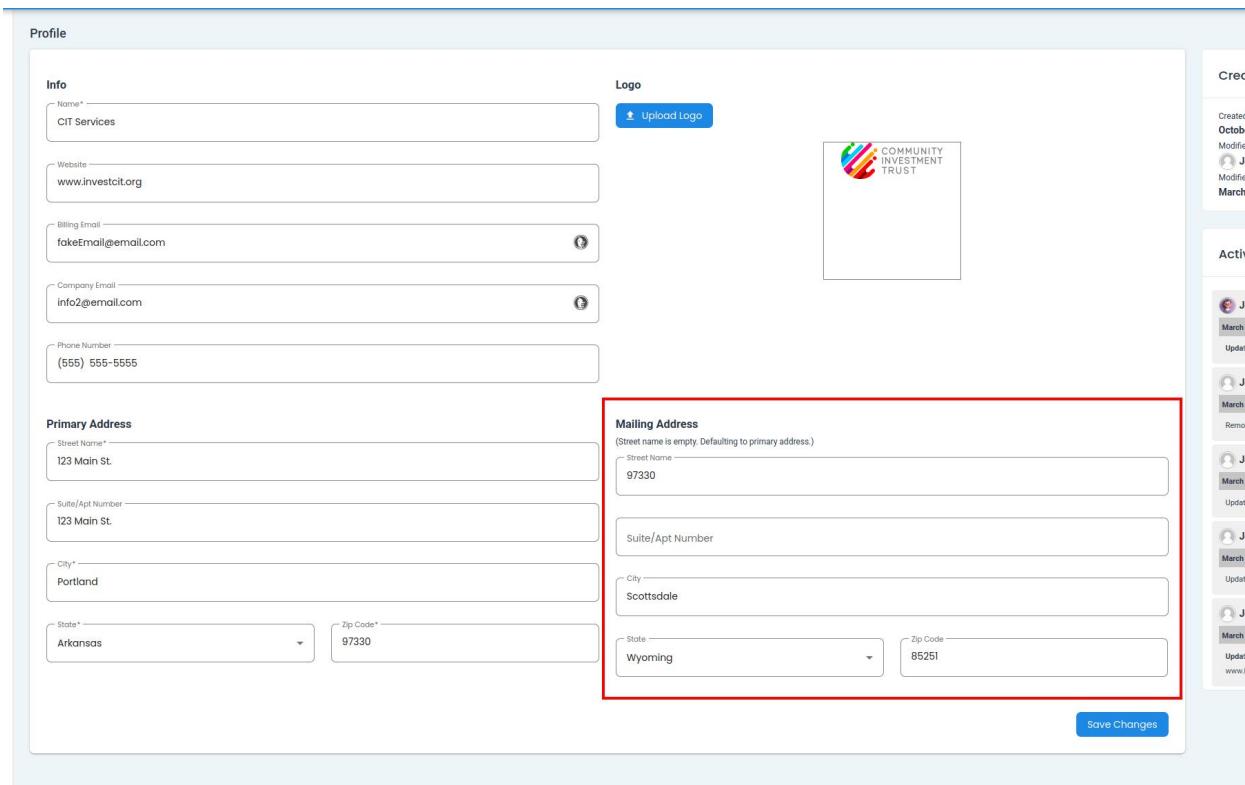
- Item Required: Street Name
- Tab: Suite/Apt Number
- Item Required: City
- Item Required: State
- Item Required: Zip Code

2.3.3.3 Mailing Address

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

2.3.3.3.1 Location: Mailing Address section

The Section: Mailing Address section can be found near the bottom of the Page: Profile page.



The screenshot shows the 'Profile' page with the 'Info' section on the left and the 'Mailing Address' section on the right, both highlighted with a red box. The 'Info' section contains fields for Name, Website, Billing Email, Company Email, and Phone Number. The 'Mailing Address' section contains fields for Street Name, Suite/Apt Number, City, State, and Zip Code. A logo for 'COMMUNITY INVESTMENT TRUST' is displayed on the right. A sidebar on the right shows a list of activities and a 'Save Changes' button at the bottom.

Fig. 13: Mailing Address Location

Note

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

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

- Street Name

- Suite/Apt Number
- City
- State
- Zip Code

2.4 User

The following Section: Sections are included in the peopleUser Category: User category:

- *User Accounts*
- *Staff Accounts*

2.4.1 Users

The Section: 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
Anissa Zolani	anissa@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	deveyse@transferonline.com	60	01/06/2025 @ 06:51 AM	Active	
John Service	cst@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	
Mohd Shoaib	mohd.shoaib@techsheedcorp.com	268	01/06/2025 @ 05:19 AM	Active	
Ponkaj CIT	ponkaj.joshi@techsheedcorp.com	0		Action Pending	

Staff Homepage #

Need help finding the Staff Homepage?

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

Hover for Page Preview Click to show

2.4.1.1 User List Homepage

The Section: Users section opens up to the Table: User List table:

Need help finding the Staff Homepage?

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

User List

Filter

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	

Fig. 14: Users, User list Table

2.4.1.2 Columns: User List Table

User List

Filter

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	

Fig. 15: User, User, Column Options

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

- Column: Contact Name
- Column: Contact Email
- Column: Number of Visits
- Column: Last Logged In
- Column: Status (Green Option: Active or Item: Inactive)
- Column: Action

2.4.1.3 Search and Filter Options

The Table: 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.

2.4.1.4 Status Options

The Item: Status dropdown includes five different options:

- Option: All (Shows all users regardless of status)
- Green Option: Active
- Item: Inactive
- Teal Option: Pending Activation
- Item: Locked Out

To Filter Users by Status:

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

Number of Visits	Last Logged In	Status
1	10/31/2024 @ 07:51 AM	Active
		Activation Pending
		Activation Pending
		Activation Pending

Fig. 16: User, User Homepage, Status Filter Dropdown

3. The table updates automatically to display matching users.

2.4.1.5 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

2.4.1.5.1 Users Homepage Location

To Find the Staff 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 Navigation Category: User category.

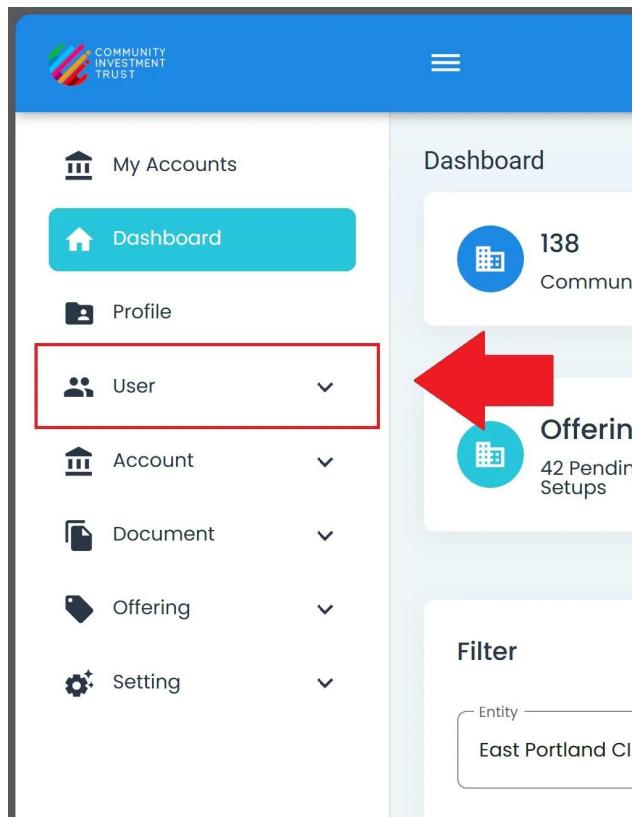
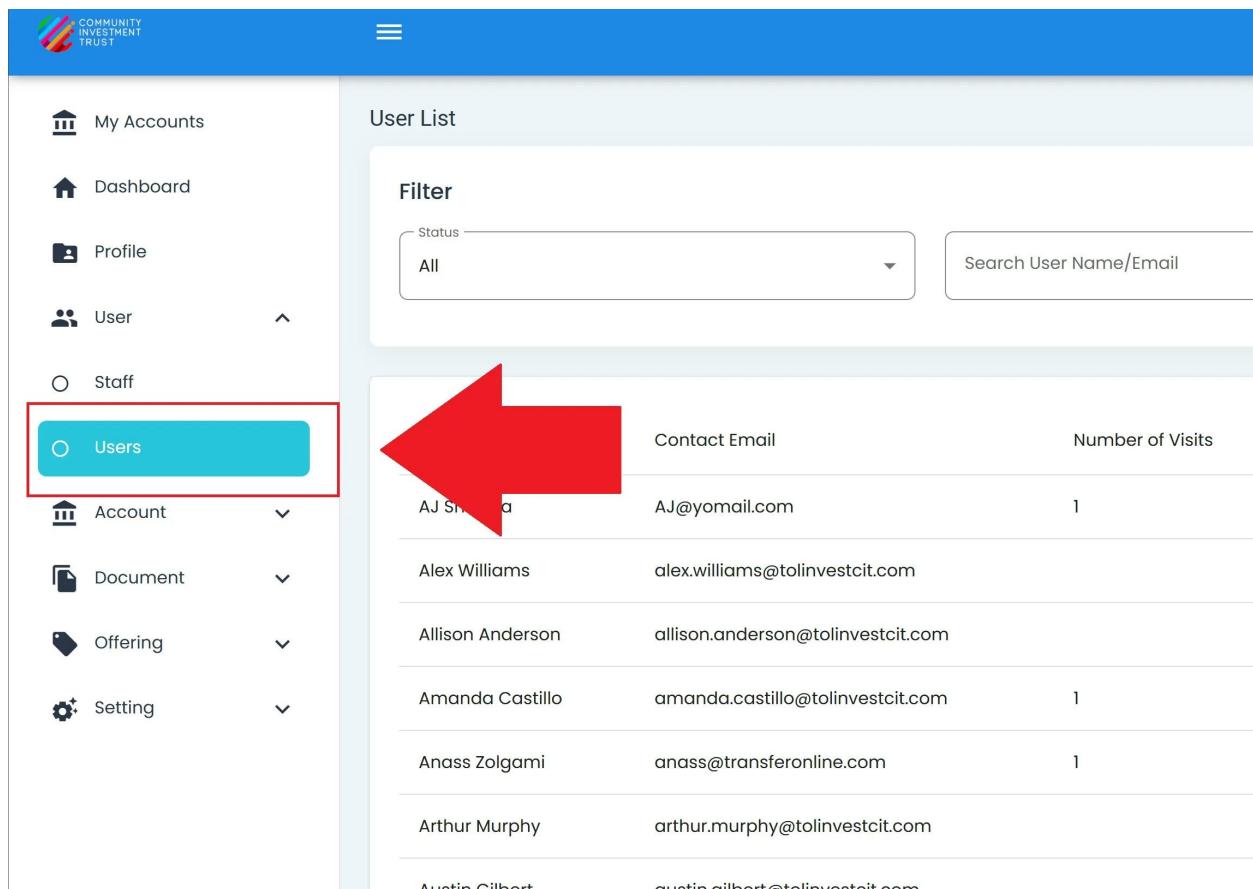


Fig. 17: User, Staff Primary Sidenav Location

3. Select Section: Users from the dropdown.



The screenshot shows the CIT Services User Homepage. The left sidebar contains a navigation menu with the following items:

- My Accounts
- Dashboard
- Profile
- User (selected, indicated by a red box)
- Staff
- Users (selected, indicated by a red box)
- Account
- Document
- Offering
- Setting

The main content area is titled "User List" and features a "Filter" section with a dropdown set to "All" and a search bar. The table below lists users with the following data:

	Contact Email	Number of Visits
AJ Shrestha	AJ@yomail.com	1
Alex Williams	alex.williams@tolinvestcit.com	
Allison Anderson	allison.anderson@tolinvestcit.com	
Amanda Castillo	amanda.castillo@tolinvestcit.com	1
Anass Zolgami	anass@transferonline.com	1
Arthur Murphy	arthur.murphy@tolinvestcit.com	
Austin Gilbert	austin.gilbert@tolinvestcit.com	

Fig. 18: Users Homepage

2.4.2 Staff

The Section: Staff 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*

2.4.2.1 Staff List Homepage

The Section: Staff section opens up to the Table: Staff List table:

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	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	 

Fig. 19: 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
Aliass Zolghami	aliass@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	doevey@transferonline.com	50	01/06/2025 @ 06:01 AM	Active	
John Service	ctg@transferonline.com	304	12/21/2024 @ 01:49 PM	Active	
John Vo	jph@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	
Mohd Rashed	mohd.rashed@techtheadcorp.com	268	01/06/2025 @ 05:19 AM	Active	
Ponkaj CIT	ponkaj.joshi@techtheadcorp.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

2.4.2.2 Features: Staff List Table

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

These details include details related to or including:

- Item: Contact Information, or
- Item: Status.

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

- Item: Three Actions (i.e., View User Details, Edit User Details, and Delete User)

2.4.2.2.1 Columns: Staff List Table

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

These Column: Columns include:

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

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	pankaj.joshi@techaheadcorp.com	0		Activation Pending	  

Fig. 20: Users, Staff Homepage, Columns

2.4.2.3 Filter by Status

The Column: Status column indicates the current status of the account.

Possible Option: Status options include:

- Item: All
- Green Option: Active
- Cyan Option: Pending Activation
- Item: Inactive
- Item: 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	pankaj.joshi@techaheadcorp.com	0		Activation Pending	  

2.4.2.4 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

2.4.2.4.1 Staff Homepage Location

To Find the Staff 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 Navigation Category: User category.

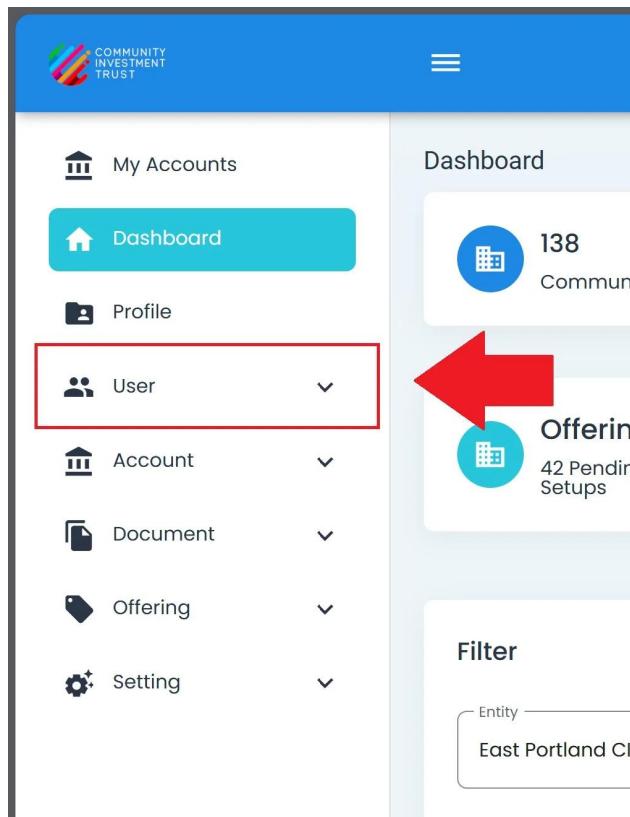


Fig. 21: User, Staff Primary Sidenav Location

3. Select Section: Staff from the dropdown.

2.5 Account

The following Section: Sections are included in the account_balanceAccount Category: Account category:

- *CIT Corporations*
- *Investors*

2.5.1 CIT Corporations List

Table of Contents

- *Features*
 - *Location: CIT Corporations Section*
- *CIT Corporations List Table*

2.5.1.1 Features

The Section: CIT Corporations section allows you to:

- *View Corporation Details*
- *Manage a CIT Corporations Legal Information*
- *Manage CIT Corporations Users*

2.5.1.1.1 Location: CIT Corporations Section

You can find the Section: CIT Corporations section underneath the account_balanceAccount Category: Account category:

ID	CIT Corporation	Sponsor Organization	Website
1	Portland CIT	Community Investment Trust	https://investcit.com
7	West Portland CIT	Community Investment Trust	http://www.entitynumber1.com
8	Hillsboro CIT	Community Investment Trust	https://www.entity2.com
12	RK Entity	Community Investment Trust	rk.com
13	John Entity's Test	Community Investment Trust	https://www.johnenentity.com
18	PP Entity	Replicator Community	https://www.ppenentity.com

Fig. 22: Account, CIT Corporations, Homepage, Primary Sidenav Location

2.5.1.2 CIT Corporations List Table

The Section: CIT Corporations section opens up to Table: CIT Corporations List table:

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.ppenity.com	ppenity@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	 

Fig. 23: CIT Corporations Section, Homepage, CIT Corporations List Table

2.5.1.2.1 Table: CIT Corporations List

The Table: CIT Corporations List table provides a comprehensive overview of all Item: CIT Corporations in the system.

Columns: CIT Corporations List Table

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

These Column: Columns include:

- Column: ID - Unique identifier for each organization
- Column: CIT Corporation - The name of the organization
- Column: Sponsorship Organization - The name of the sponsoring organization
- Column: Website - Organization's website URL
- Column: Email - Primary contact email
- Column: Phone - Contact phone number
- Column: Status - Current status of the organization
- Column: Action - Available actions for this organization

Sponsor Organization List								
Filter								+
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@itol.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	5555555555	Active	 	

Fig. 24: Account, Sponsorship Organizations, Homepage, Table Columns

Available Actions

The Column: Action column provides the following operations:

- *View CIT Corporation Details* - View *detailed information about the organization*
- *Manage Sponsor Organization* - Modify organization information

2.5.1.2.2 View CIT Corporation Details

This Section: View Account Detail section for a Item: 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. Action: Select the *View Account Details* button for the corporation you want to view.

Action Will Take You to the Corporation Information Tab

See *CIT Corporation Information Tab* for more information.

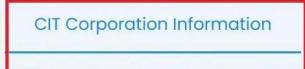
Search CIT Corporation				
Website	Email	Phone	Status	Action
https://investcit.com	cit@mercycorps.org	(503) 896-5073	Active	 
http://www.entitynumber1.com	entity1@transferonline.com	(503) 752-4444	Active	 
https://www.entity2.com	iohn@transferonline.com	(503) 720-2853	Active	 

Fig. 25: CIT Corporation, Homepage, View More Icon Location

Corporation Information Tab

The Tab: CIT Corporation Information tab provides a comprehensive overview of the Item: CIT Corporation.

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

Info

CIT Corp
FakeCorp

Website
<https://FakeCorp.com>

Billing Email

Logo

Fig. 26: CIT Corporation, View Corporation, Corporation Information Tab Location

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

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

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

- Item Required: Primary Address,
- Tab: Mailing Address, or
- Tab: 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 Section: Upload Logo section allows you to upload a logo for your Item: CIT Corporation. It can be found at the top-right of the page:

The screenshot shows the 'CIT Corporation: East Portland CIT' page with the 'CIT Corporation Information' tab selected. The 'Logo' section is highlighted with a red box. It contains a 'Logo' input field with a 'Upload Logo' button, a preview area showing a logo for 'East Portland CIT', and two checkboxes: 'Require Investor to Upload Proof of Address' and 'Does the Proof of Address document need to be approved before allowing the investor to invest?'. Below the logo section are sections for 'Primary Address' and 'Mailing Address'.

Fig. 27: Sponsorship Organization, Upload Logo Location

Upload Logo Options

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

- **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.

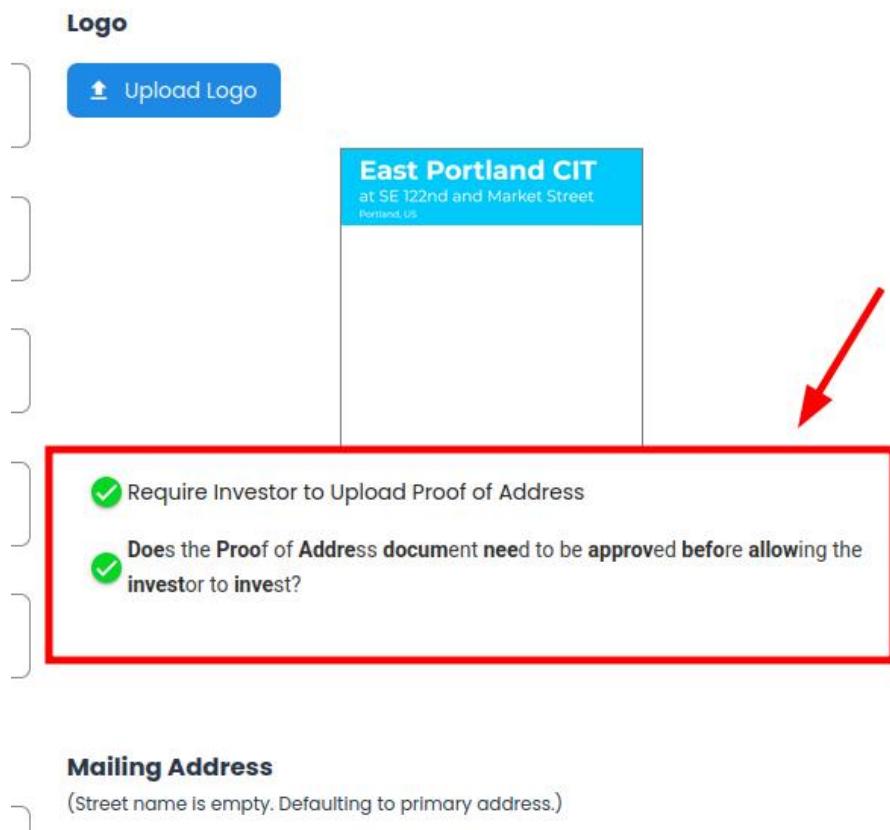


Fig. 28: CIT Corporation, Upload Logo Location

Other Tabs

You can also view and modify the following tabs:

- *Users Tab*
- *Legal Information Tab*

Legal Information Tab

The Tab: 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

Legal Name*
East Portland CIT 2

EIN
21-2121212

State Of Incorporation
Arkansas

State Of Operating
Arizona

Date Formed
11/27/2024

MM/DD/YYYY

State Filing Number

Company Contact

Contact Name

Contact Email

Contact Phone

Accounting Contact

Firm Name

Contact Name

Contact Email

Contact Phone

Address

Street Name

Suite/Apt Number

Legal Contact

Contact Name

Fig. 29: CIT Corporation, Legal Information Tab

Information Available in the Legal Tab

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

- Item Required: Legal Name
- Tab: EIN
- Tab: State of Incorporation
- Tab: State of Operating
- Tab: Date Formed
- Tab: State Filing Number

In addition, this tab allows you to view and edit a Item: CIT Corporation's:

- Tab: Address,
- Tab: Company Contact,
- Tab: Accounting Contact, Or
- Tab: 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 Tab: Users tab is a list of all users associated with the Page: CIT Corporation.

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

CIT Corporation Information Legal Information **Users** 

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	  

Fig. 30: CIT Corporation, Users Tab Location

Navigating the Users Tab

The Column: Actions column for the Tab: Users tab has the following actions available:

- View User Details
- Edit Permissions
- Remove User Access

Adding a New User to the CIT Corporation

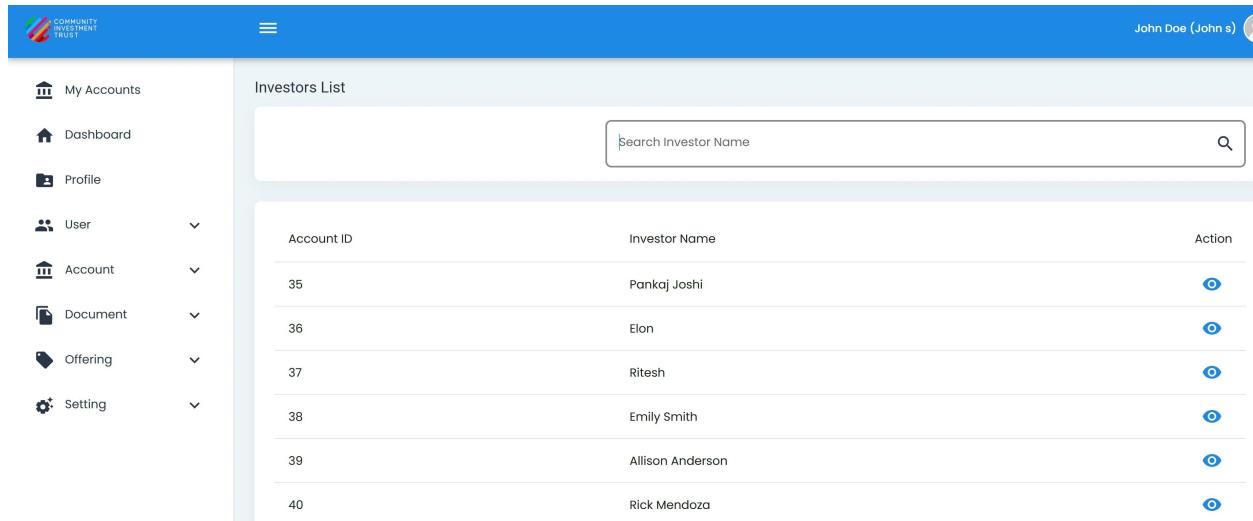
1. Follow the instructions in the Adding a New User section.

Permissions Options
<ul style="list-style-type: none">• Assessment Test<ul style="list-style-type: none">– View Assessment Test Results• Billing<ul style="list-style-type: none">– View Invoice– View Payment• Cashout<ul style="list-style-type: none">– Add/Edit Cashout Questions– Approve/Deny Cashout Requests– Edit Cashout Price Per Share– View Cashout• Community<ul style="list-style-type: none">– Edit Community Profile• Demographic<ul style="list-style-type: none">– Add/Edit Demographic Questions– Add/Edit Renew Demographic Questions• Document<ul style="list-style-type: none">– Upload Entity Offering Document– Upload Entity Onboarding Document– View Entity Offering Document– View Entity Onboarding Document• Entity<ul style="list-style-type: none">– Add/Edit Entity• Investor/Shareholder<ul style="list-style-type: none">– Add/Edit Investor– View Investor

- **Offering**
 - Add/Edit Offering
- **Report**
 - Run Shareholder List Report
- **User**
 - Edit/Add Community Staff
 - Edit/Add User
 - View Users

2.5.2 Investors

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



The screenshot shows the 'Investors List' section of the application. The left sidebar contains navigation links: 'My Accounts', 'Dashboard', 'Profile', 'User', 'Account', 'Document', 'Offering', and 'Setting'. The main area is titled 'Investors List' and features a search bar with the placeholder 'Search Investor Name'. Below the search bar is a table with the following data:

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

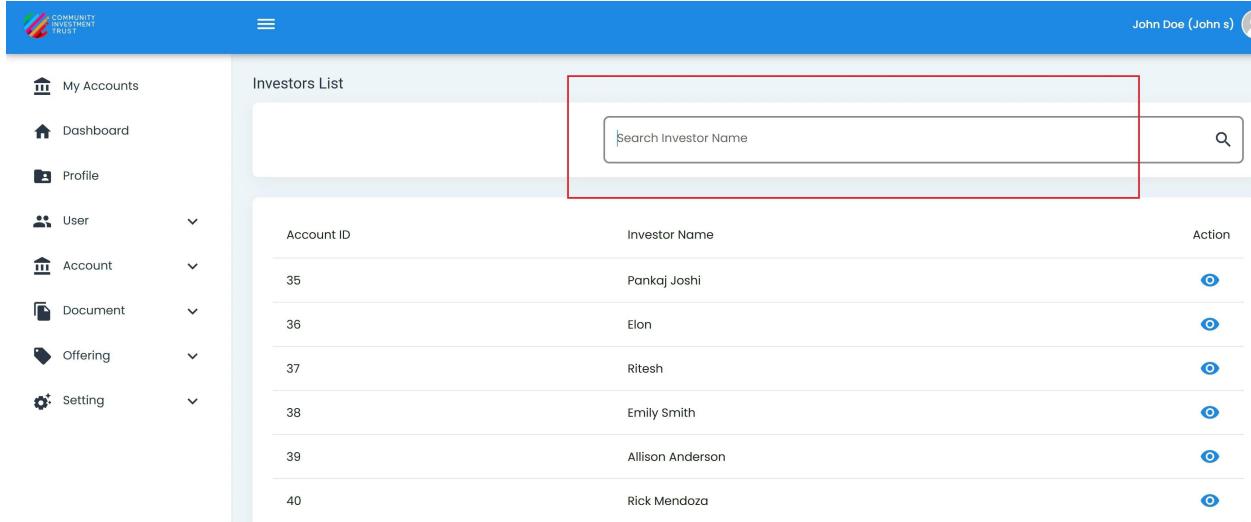
Fig. 31: Investors List Homepage

2.5.2.1 Overview

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

2.5.2.2 Search Functionality

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



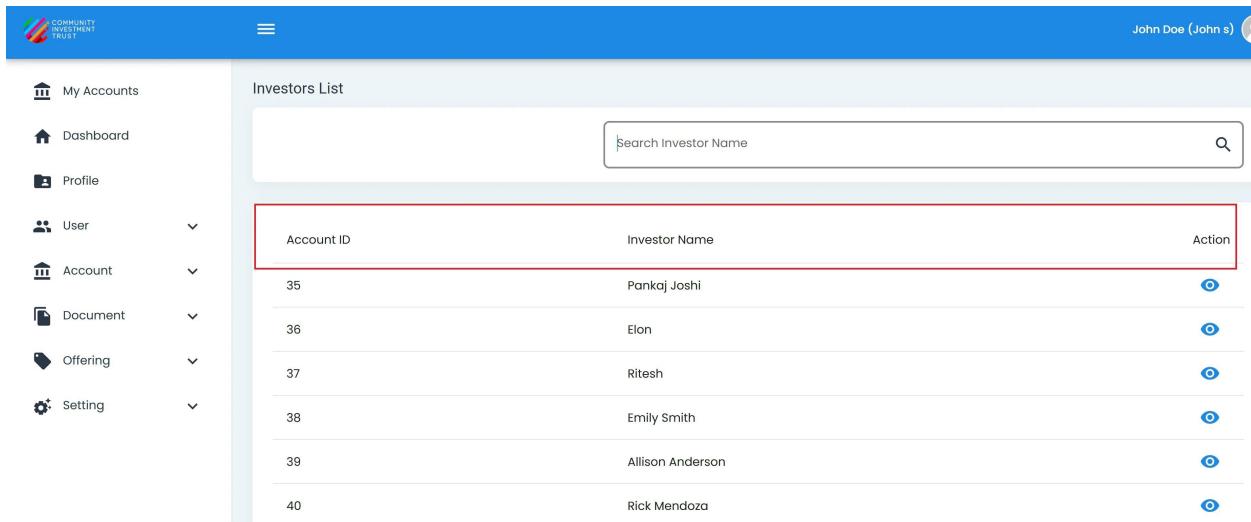
The screenshot shows the 'Investors List' page. On the left is a sidebar with navigation links: 'My Accounts', 'Dashboard', 'Profile', 'User', 'Account', 'Document', 'Offering', and 'Setting'. The main area is titled 'Investors List' and contains a search bar with the placeholder 'Search Investor Name' and a magnifying glass icon. Below the search bar is a table with columns: 'Account ID', 'Investor Name', and 'Action'. The table data is as follows:

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

Fig. 32: Investors List, Search Bar Location

2.5.2.3 Investors Table

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



The screenshot shows the 'Investors List' page. The sidebar and table structure are identical to Fig. 32. The table columns are explicitly labeled: 'Account ID', 'Investor Name', and 'Action'. The table data is the same as in Fig. 32.

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

Fig. 33: Investors List, Table Column Names

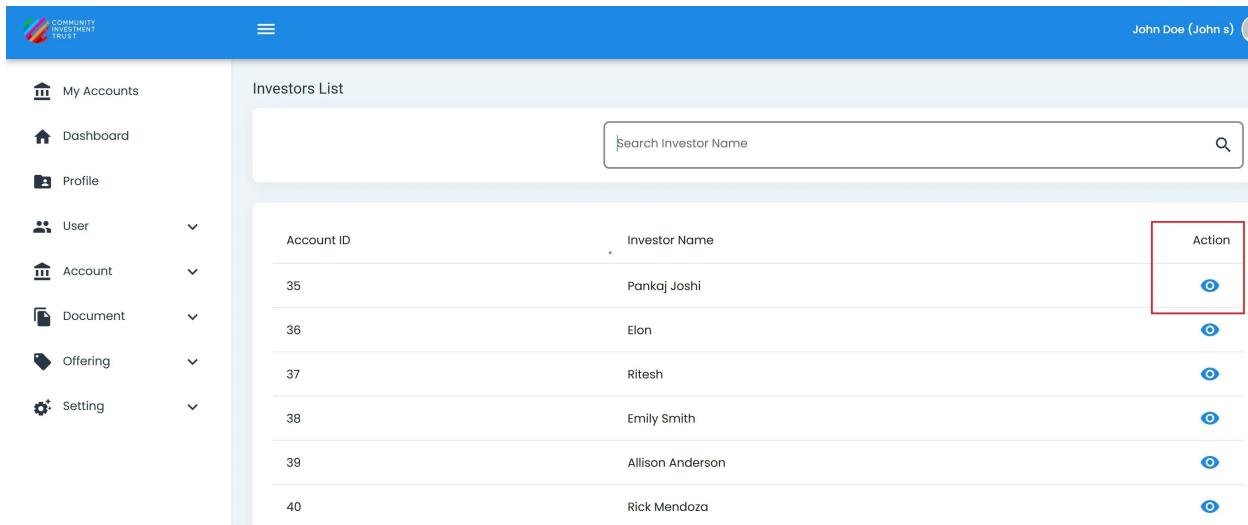
2.5.2.3.1 Table Columns

The Table: Investors Table contains the following columns:

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

2.5.2.3.2 Action Column

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



The screenshot shows a user interface for managing investor accounts. On the left is a vertical sidebar with a logo for 'COMMUNITY INVESTMENT TRUST' and a navigation menu. The menu items include 'My Accounts', 'Dashboard', 'Profile', 'User' (with a dropdown arrow), 'Account' (with a dropdown arrow), 'Document' (with a dropdown arrow), 'Offering' (with a dropdown arrow), and 'Setting' (with a dropdown arrow). The main content area is titled 'Investors List' and contains a table with columns for 'Account ID' and 'Investor Name'. To the right of the 'Investor Name' column is an 'Action' column, which is highlighted with a red box. Each row in the table has a blue circular icon in the 'Action' column. The table data is as follows:

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

Fig. 34: Investors List, Action Column Location

Available Actions

The Column: Action column includes the following operations:

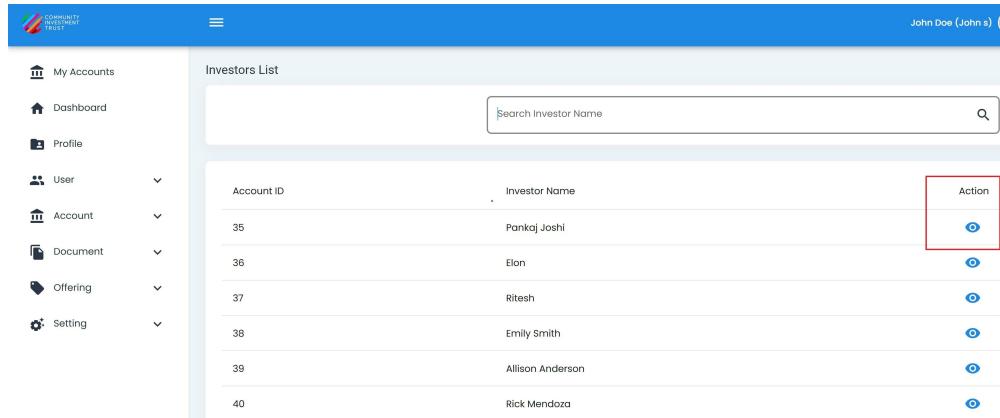
- *View More Details* - View and edit detailed information about the Investor

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 Table: Investors Table, locate the investor whose details you want to view.
2. Click the *View Investor Details* icon located in the Column: Action column for that investor.



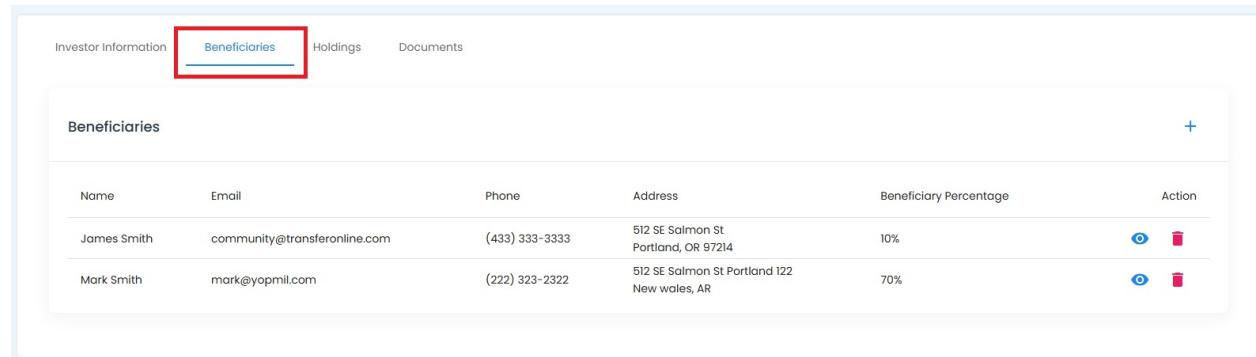
Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Fig. 35: Investors List, View Action Location

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

Beneficiaries Tab

The Tab: Beneficiaries tab allows you to view and manage all beneficiaries associated with an investor.

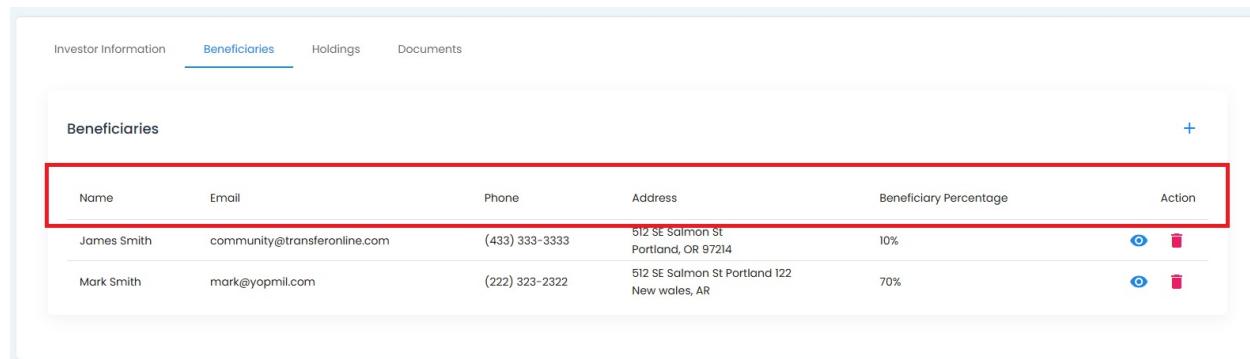


Name	Email	Phone	Address	Beneficiary Percentage	Action
James Smith	community@transferonline.com	(433) 333-3333	512 SE Salmon St Portland, OR 97214	10%	 
Mark Smith	mark@yopmil.com	(222) 323-2322	512 SE Salmon St Portland 122 New wales, AR	70%	 

Fig. 36: Investor Details, Beneficiaries Tab Location

Beneficiaries Tab Overview

The Tab: Beneficiaries tab displays a list of all beneficiaries linked to the investor, including their contact information and allocation percentages.



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%	 

Fig. 37: Investor Details, Beneficiaries Tab View

Beneficiary Table

The Table: Beneficiaries Table contains the following columns:

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

Available Actions

The Column: 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.

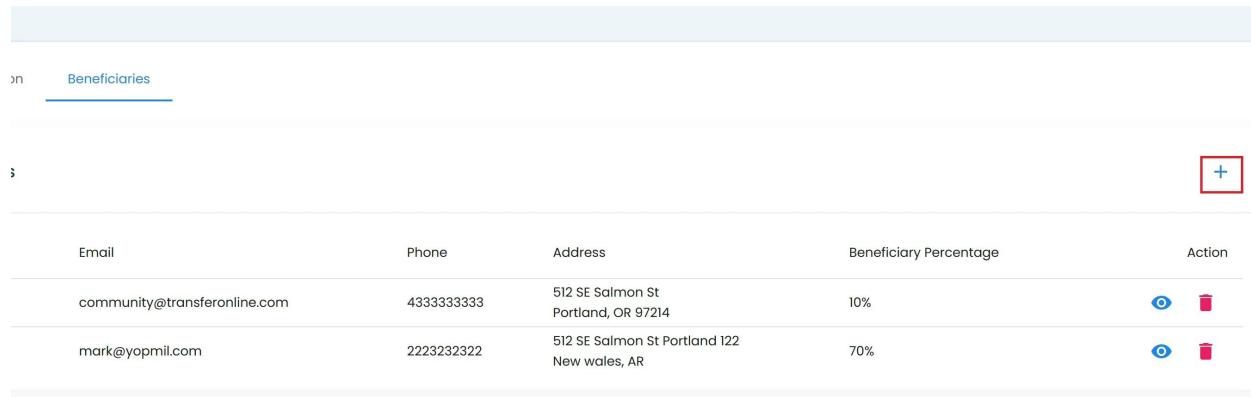
Adding a New Beneficiary

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

1. Click the plus icon [+] at the top right of the Table: Beneficiaries Table.
2. The Add Beneficiary popup will appear.
3. Place cursor in desired field.
4. Fill in relevant information.

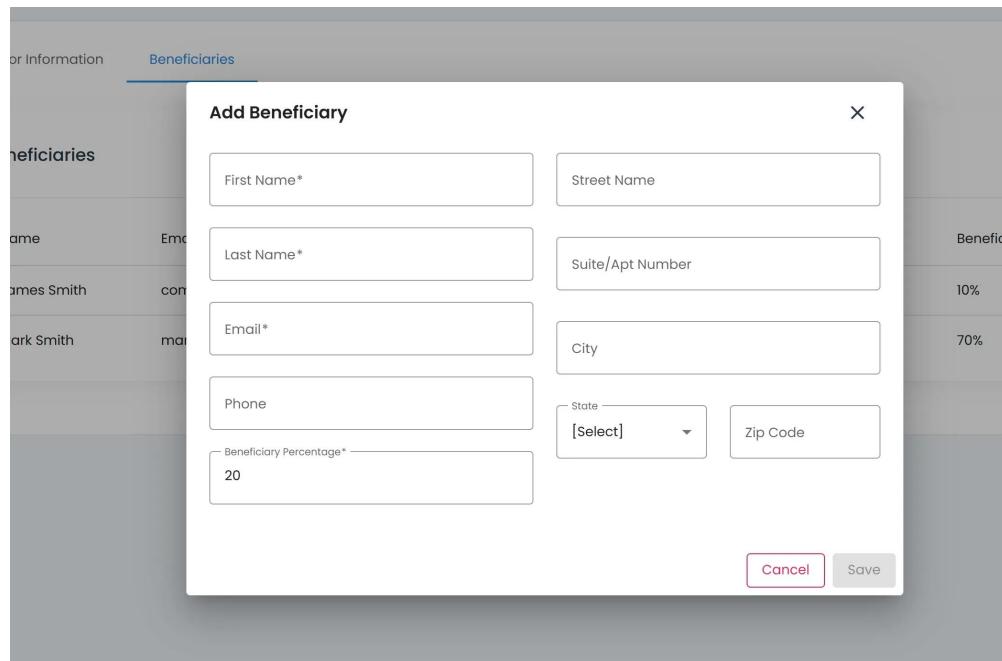
Possible fields include:

- Item Required: First Name (required)



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%	 

Fig. 38: Investor Details, Add Beneficiary Button Location



Add Beneficiary

First Name*

Street Name

Last Name*

Suite/Apt Number

Email*

City

Phone

Beneficiary Percentage* [Select]

Zip Code

Fig. 39: Add Beneficiary Popup

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

5. Fill in necessary information, which can include the following

6. 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 Tab: 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 Tab: Investor Details tab will be the second tab that appears when [Viewing Investor Information](#).

Note

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

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

Fig. 40: Investor Details Tab Location

Investor Information Section

The Section: 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
- Tab: Mailing Address

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

Fig. 41: Investor Information Section

Available Information

The Investor Details tab displays the following information categories:

Personal Information

The Subsection: 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.

Note

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

Holdings List Tab

The Tab: Holdings List tab provides a quick overview of all holdings associated with a chosen Item: Investor.

Contents

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

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

Code* _____
204

Street Name _____

Suite/Apt Number _____

City _____

State _____
[Select] ▾

Zip Code _____

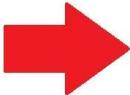
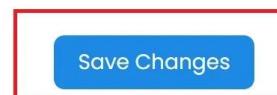
  Save Changes

Fig. 42: Investor Details Save Changes

Location: Holdings Tab

The Tab: Holdings List tab will be the third tab that appears when *Viewing Investor Information*.



Fig. 43: Account, Investors, Investor Information, Holdings Tab

Columns: Holdings List Table

The Table: Holdings table will have the following columns:

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

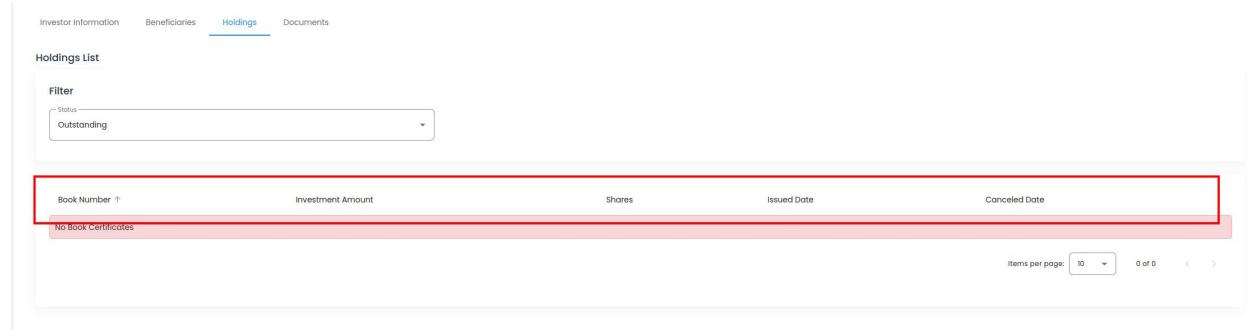


Fig. 44: Account, Investors, Investor Information, Holdings Tab, Columns Explained

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 Table: Holdings List table by Option: Status.

To Filter Holdings by Status:

1. Find the Column: Status column.

Fig. 45: Account, Investors, Investor Information, Holdings Tab, Status Filter Dropdown

2. Select the status you want to filter by.

Available Statuses

The Tab: Holdings List tab allows you to filter by the following statuses:

- Option: Outstanding & Canceled
- Option: Outstanding
- Option: Canceled

Action Complete

The table should update as you select a new status. The Table: Holdings List Table will automatically update. No other action is required.

Documents List Tab

The Tab: Documents List tab provides a quick overview of all documents associated with a chosen Item: Investor.

Contents

- [Documents List Tab](#)
 - [Location: Documents Tab](#)

- *Columns: Documents List Table*
- *Search for Documents*
- *Other Actions*
- * *Available Actions*

Location: Documents Tab



Fig. 46: Account, Investors, Investor Information, Documents Tab

Columns: Documents List Table

The Table: Documents table will have the following columns:

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

The screenshot shows the 'Offering Documents' section with a red box highlighting the entire table structure. The table has columns for 'ID', 'CIT Corporation', 'Offering Year', 'Filename', 'Document Type', 'Signed Date', and 'Action'. A pink banner at the bottom of the table area displays the message 'No documents'. At the very bottom right, there is a 'Items per page:' dropdown set to '10' and a page navigation indicator showing '0 of 0'.

Fig. 47: Account, Investors, Investor Information, Documents Tab, Columns Explained

Search for Documents

1. Place cursor in search field.

Offering Documents

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

Fig. 48: Account, Investors, Investor Information, Documents Tab, Search Location

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

Investor Information Beneficiaries Holdings Documents

Investor Info

Name* <input type="text"/>	SSN <input type="text"/>
Date Of Birth <input type="text"/>	Email* <input type="text"/>
Phone <input type="text"/>	

Primary Address

Portland St.	Street Name
Suite/Apt Number	Suite/Apt Number
City* <input type="text"/>	City
State* <input type="text"/>	State
Oregon	Zip Code* <input type="text"/>

Mailing Address

(Street name is empty. Defaulting to primary address.)	
Street Name <input type="text"/>	
Suite/Apt Number <input type="text"/>	
City <input type="text"/>	
State <input type="text"/>	Zip Code <input type="text"/>

Fig. 49: Account, Investors, Investor Information, Documents Tab, Search Results

Other Actions

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

Available Actions

The Column: 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 Item: User's default downloads folder.

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	
22	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/22/2025	
21	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/22/2025	

Fig. 50: Account, Investors, Investor Information, Documents Tab, Action Column Location

2.6 Document

This following Section: Sections are included in the file_copyDocument Category: Document category:

1. *CIT Corporation Onboarding Documents*
2. *CIT Corporation Offering Documents*

2.6.1 CIT Corporation Onboarding Documents

Table of Contents

- *Features: CIT Corporation Onboarding*
- *Location: CIT Corporation Onboarding*
- *Table: Onboarding Documents List*
- *Onboarding Documents Table*

2.6.1.1 Features: CIT Corporation Onboarding

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

The Section: 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., Item: All, Item: Pending, or Item: Completed)
- *View document completion status*

2.6.1.2 Location: CIT Corporation Onboarding

The Page: CIT Corporation Onboarding section can be found under the file_copyDocument Category: Document category.

2.6.1.3 Table: Onboarding Documents List

The Section: CIT Corp Onboarding section opens up to the Table: Onboarding Documents table:

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

2.6.1.3.1 CIT Onboarding Documents Table: Columns Explained

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

- Column: ID column - The Item: ID associated with the process itself.

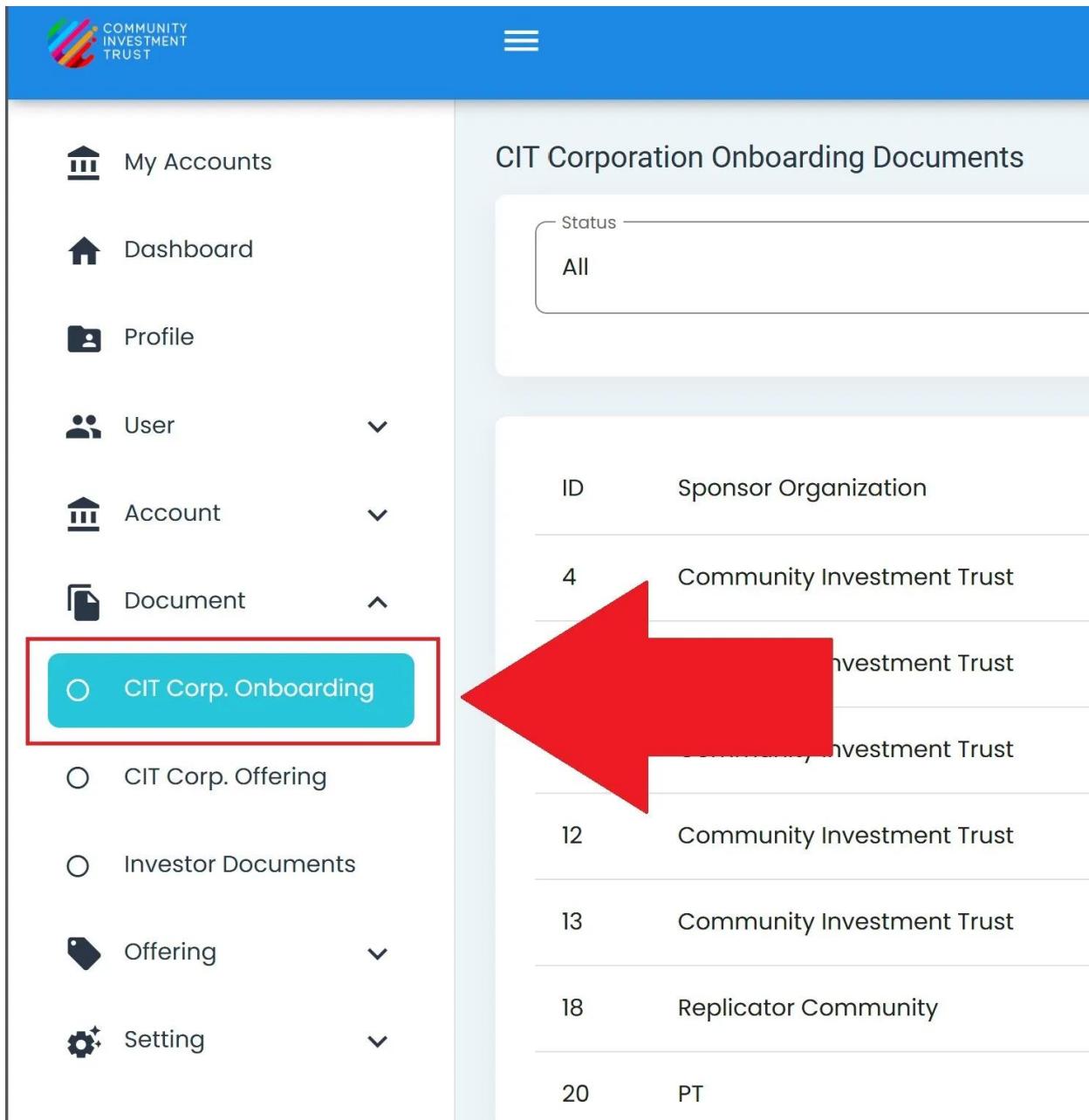
Note

This Item: ID can be used for {insert significance of ID}

- Column: Sponsorship Organization column - The **Sponsorship Organization** that is sponsoring the onboarding process.
- Column: CIT Corporation column - The **CIT Corporation** that is being onboarded.
- Column: Document Complete column - Shows the number of onboarding documents a corporation has completed.
- Column: Pending For Approval column - Number of documents that have been submitted but are pending approval.
- Column: New Message column - Will show the number of new messages regarding the onboarding process.
- Column: Status column - Status of where the corporation is at on the Offering process (i.e., Cyan Option: All, Cyan Option: Pending, Cyan Option: Complete)
- Column: 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 Cyan Option: Descending or Cyan Option: Ascending by clicking on column name.



The screenshot shows the CIT Services User Manual interface. On the left, a sidebar menu lists various options: My Accounts, Dashboard, Profile, User (with a dropdown arrow), Account (with a dropdown arrow), Document (with a dropdown arrow), CIT Corp. Onboarding (highlighted with a red box and a red arrow), CIT Corp. Offering, Investor Documents, Offering (with a dropdown arrow), and Setting (with a dropdown arrow). The main content area is titled "CIT Corporation Onboarding Documents". It features a "Status" filter set to "All". Below this, a table lists "Sponsor Organization" entries. The table has two columns: "ID" and "Sponsor Organization". The entries are:

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

Fig. 51: CIT Corporation Onboarding, Location

CIT Corporation Onboarding Documents							
Status		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	
--	--	--	--	--	--	--	--

Fig. 52: CIT Corporation Onboarding Section, Homepage, Onboarding Documents Table

CIT Corporation Onboarding Documents							
Status		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	

2.6.1.3.2 Status Filters for Onboarding Documents Table

The table can be filtered by the following Statuses:

- Item: All
- Item: Pending
- Item: Completed

1. Find and select the Option: Status dropdown.

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Count
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	Hillsboro CIT	0	0 of 8

2. Select the desired status from the dropdown.

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Count
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	Hillsboro CIT	0	0 of 8

Note

The table should automatically update to only show rows of the selected Option: Status.

2.6.1.3.3 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.

2.6.1.3.4 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

2.6.1.4 Onboarding Documents Table

The Table: Onboarding Documents table is what first appears on the homepage of the Page: CIT Corporation Onboarding page section:

CIT Corporation Onboarding Documents							
Status		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
7	Community Investment Trust	West Portland CIT	3 of 4	0	0	Pending	View
8	Community Investment Trust	Hillsboro CIT	0 of 4	2	0	Pending	View
12	Community Investment Trust	RK Entity	0 of 4	0	0	Pending	View
13	Community Investment Trust	John Entity's Test	0 of 4	0	0	Pending	View
18	Replicator Community	PP Entity	0 of 4	0	0	Pending	View
20	PT	Shahzad	0 of 4	0	0	Pending	View
--	--	--	--	--	--	--	--

The Table: 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](#)

2.6.2 CIT Onboarding Documents Table: Columns Explained

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 Table: Onboarding Documents Table table:

- Column: ID column - The Item: ID associated with the process itself.

Note

This Item: ID can be used for {insert significance of ID}

- Column: Sponsorship Organization column - The **Sponsorship Organization** that is sponsoring the onboarding process.
- Column: CIT Corporation column - The **CIT Corporation** that is being onboarded.
- Column: Document Complete column - Shows the number of onboarding documents a corporation has completed.
- Column: Pending For Approval column - Number of documents that have been submitted but are pending approval.
- Column: New Message column - Will show the number of new messages regarding the onboarding process.
- Column: Status column - Status of where the corporation is at on the Offering process (i.e., Cyan Option: All, Cyan Option: Pending, Cyan Option: Complete)
- Column: 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 Cyan Option: Descending or Cyan Option: Ascending by clicking on column name.

2.6.3 CIT Corporation Offering

Table of Contents

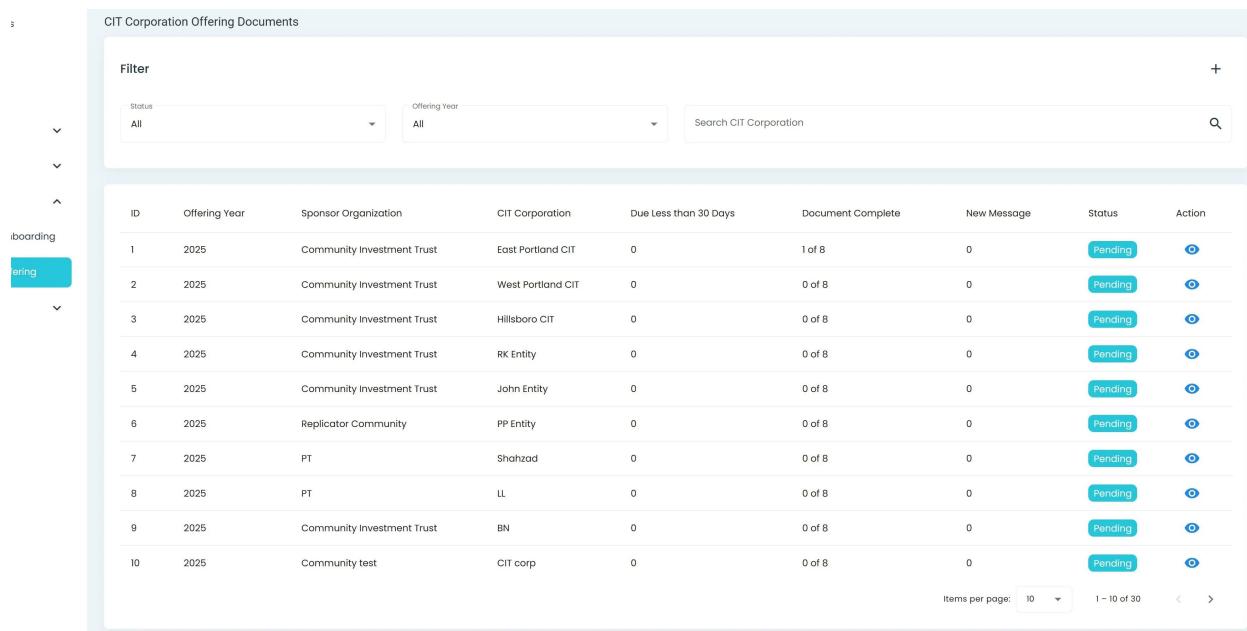
- *Features: CIT Corporation Offering*
- *Offering Documents Table*

2.6.3.1 Features: CIT Corporation Offering

The Section: 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., Item: All, Item: Pending, or Item: Completed)
- *Filter by Offering Year*



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	

Fig. 53: CIT Corporation Offering Homepage

2.6.3.2 Offering Documents Table

The Table: Offering Documents Table is what first appears on the homepage of the Page: CIT Corporation Offering Documents section.

The Table: 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.

2.6.3.2.1 CIT Offering Documents Table: Columns Explained

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	

Fig. 54: CIT Offering Documents Table Columns

There are 8 columns in the Table: Offering Documents Table:

- Column: ID - The Item: ID associated with the process itself.

Note

This Item: ID can be used for {insert significance of ID}

- Column: Offering Year - The Item: Offering Year that is associated with the offering process.
- Column: Sponsor Organization - The Item: Organization that is sponsoring the Offering.
- Column: CIT Corporation - The Item: CIT Corporation associated with the Offering.
- Column: Due Less than 30 Days - This shows how many Offering Documents are due in less than 30 days.
- Column: Document Complete - Shows the number of Offering documents a corporation has completed.
- Column: New Message - Will show the number of new messages regarding the Offering process.
- Column: Status - Status of where the corporation is at on the Offering process (i.e., Cyan Option: All, Cyan Option: Pending, Cyan Option: Complete)
- Column: Action
 - 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 Cyan Option: Descending or Cyan Option: Ascending by clicking on column name.

2.6.3.2.2 CIT Offering Status Filter

Status Filter Options

The Table: Offering Documents Table can be filtered by the following Option: Status options:

- Item: All
- Item: Pending
- Item: Completed

How to Filter by Status

1. Find and select the Option: Status dropdown.

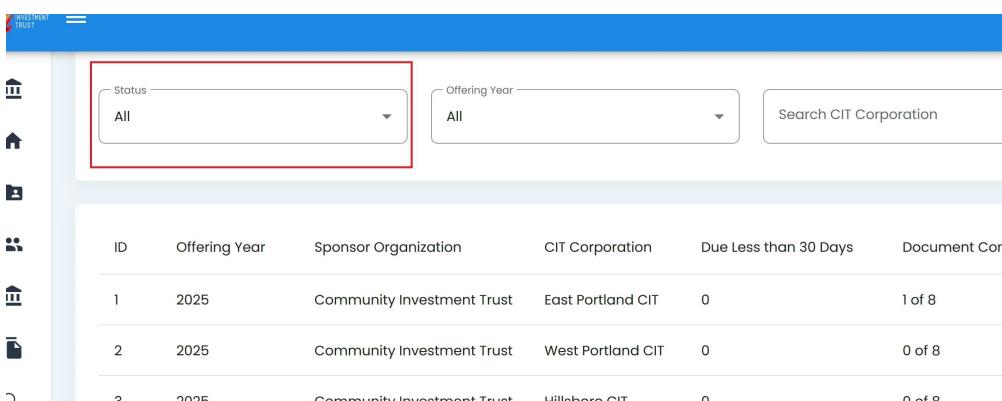


Fig. 55: Status Filter Location

2. Select the desired status from the dropdown.

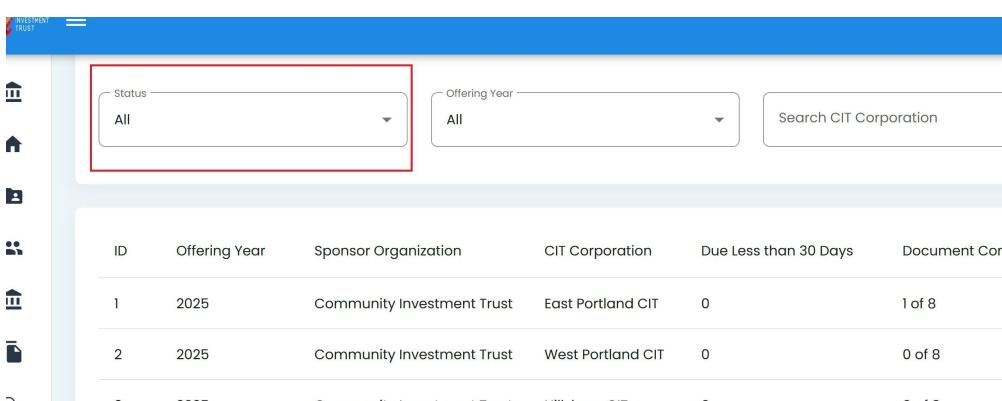


Fig. 56: Status Dropdown Options

Action Complete

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

Status Types

Status Types

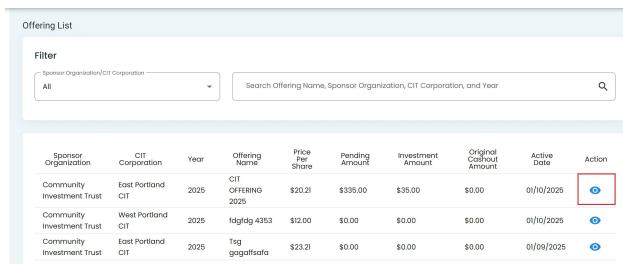
- Cyan Option: All: Displays all CIT Corporations regardless of their offering status
- Green Option: Pending: Shows only CIT Corporations with offering documents that are still in process
- Green Option: Completed: Shows only CIT Corporations that have completed all offering document requirements

2.6.3.2.3 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									
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	fdgfdg 4383	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	fgfgeffsfa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	

Fig. 57: 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

2.6.4 Investor Documents

The Page: 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.

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

Fig. 58: Investor Documents, Homepage and Location

2.6.4.1 Table: Investor Documents

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

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

2.6.4.1.1 Table Columns Explained

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).

CIT Services User Manual, Release 1

Investor Documents								
Filter								
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	 	

Investor Documents								
Filter								
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	 	

- **Signed Date** - The date the document was signed.
- **Action** - Contains actions:
 - Action: View Details: Opens document details in a new tab.
 - Action: Download: Initiates document download.

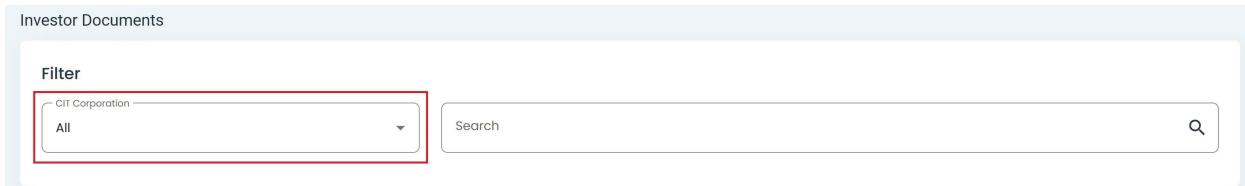
Column Sorting

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

2.6.4.1.2 Filter by CIT Corporation

You can filter the table by the CIT Corporation:

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



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

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

2.6.4.1.3 How to Search Investor Documents

To search for a specific document or investor:

1. Find the **Search** bar.
2. Search by Column: Investor Name.
3. Press **Enter** or click the search icon to perform the search.

2.6.4.1.4 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
```

2.6.5 View More Details: Documents

The Page: View More Details pages for the Section: Onboarding Documents and Section: 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:

Looking for an Overview?

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

2.6.5.1 Layout Explanation

2.6.5.1.1 View Details: Tabs Explained

The detailed view of the Page: Documents page contains 4 tabs to sort through:

- Deep Blue Option: All - All documents, regardless of status.
- Cyan Option: Upload Pending - Documents awaiting upload.
- Orange Option: Pending Approval - Documents awaiting approval.
- Green Option: Completed - Documents fully approved and completed.

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

Status  7 Document(s) left

All	3
<input checked="" type="checkbox"/> 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
<input type="checkbox"/> Pending Upload	1
<input type="checkbox"/> Pending Approval	2
<input type="checkbox"/> Completed	1

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 ()

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

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

Shareholder Agreement
File: Magic Partnership LLC Subscription Agreement.pdf | Uploaded on October 14, 2024 @ 5:15 PM by Entity Admin | Due On: December 1, 2024
Pending for Approval

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

Messages ()

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

Invoice Paid
Document Pending Upload | Due On: December 31, 2024 | Overdue

CIT Corporation Onboarding Documents: East Portland CIT

Status  1 Document(s) left

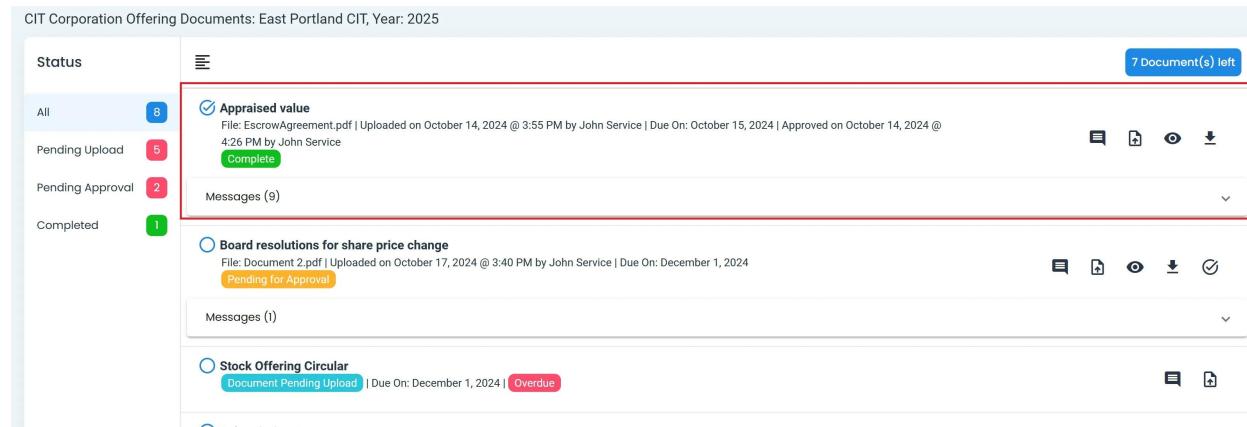
All	4
<input type="checkbox"/> License Agreement between CIT Services LLC and CIT Corporation	File: Master Subscription Document.pdf Uploaded on October 11, 2024 @ 4:34 PM by John Service Approved on October 11, 2024 @ 4:38 PM by John Service Complete
<input type="checkbox"/> CIT Corporation Bylaws & 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
<input type="checkbox"/> 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 (12)

Messages (2)

Messages (2)

2.6.5.1.2 View Details: Cards Explained



The screenshot shows a list of documents under the heading 'CIT Corporation Offering Documents: East Portland CIT, Year: 2025'. The list is filtered by 'Status' and shows the following items:

- All** (8 documents):
 - 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 (Status: Complete)
 - 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 (Status: Pending for Approval)
 - Stock Offering Circular**: Document Pending Upload | Due On: December 1, 2024 | Overdue
- Pending Upload** (3 documents):
- Pending Approval** (2 documents):
- Completed** (1 document):

A red box highlights the first document in the 'All' section, showing its details: 'Appraised value', file type 'pdf', upload date 'October 14, 2024 @ 3:55 PM', uploaded by 'John Service', due date 'October 15, 2024', and approval date 'October 14, 2024 @ 4:26 PM'. The status is 'Complete'. To the right of the card are icons for message, file, eye, download, and a checkmark.

Each card will display information about a document, including:

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

2.6.5.2 Available Actions

Each Option: Status has its own set of available actions:

- All Status
- Upload Pending Status
- Pending Approval Status

2.7 Offering

The following Section: Sections are included in the account_balanceAccount Category: Offering category:

- *Offerings*
- *Enrollments*

2.7.1 Offerings

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

Table of Contents

- *Offerings*
 - *Location: Offerings*
 - *Table: Offerings List*
 - *Columns: Offerings List Table*

2.7.1.1 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. Action: Select the dropdown for the Navigation Category: Offering category.
3. Action: Select Section: Offerings from the dropdown.

2.7.1.2 Table: Offerings List

The Table: Offerings List table is what first appears on the homepage of the Section: Offerings section.

2.7.1.3 Columns: Offerings List Table

The Table: Offerings List table has the following Column: Columns:

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

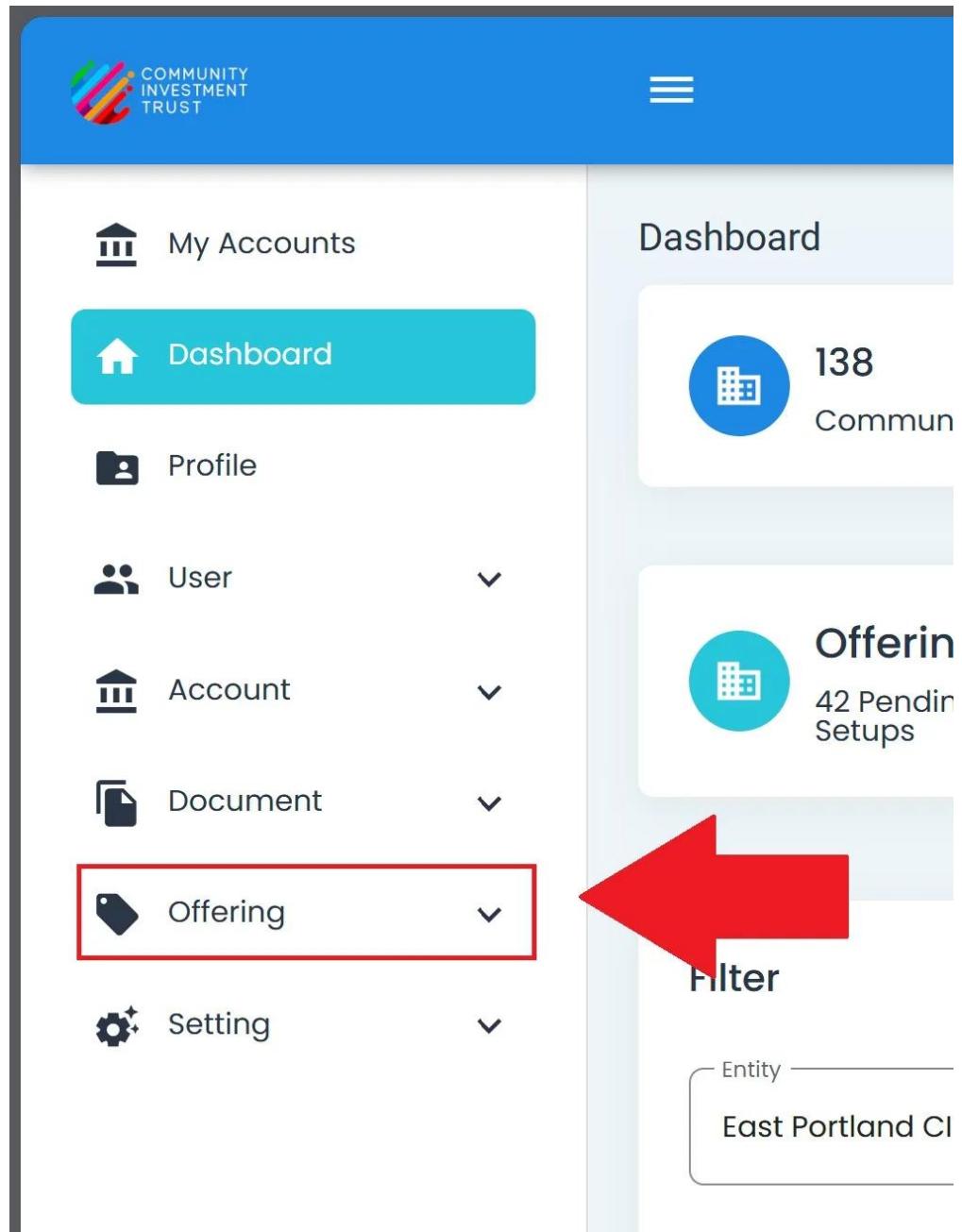


Fig. 59: Offering, Offerings Primary Sidenav Dropdown Location

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 gagaffsafa	\$
Community Investment Trust	West Portland CIT	2025	dgsg sgasg 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	East Portland	2023	EAST PORTLAND	\$

Fig. 60: Offering, Offerings Homepage

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	fdgfdg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsafa	\$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	

Fig. 61: Offering, Offerings Homepage, Offerings List table

Offering List										
Filter										
Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action	
Community Investment Trust										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 gagafsofa	\$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	

Fig. 62: Offering, Offerings Homepage, Offerings List table

2.7.2 Enrollments

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

Contents

- *Enrollments*
 - *Enrollments Homepage Location*
 - *Related Sections*

2.7.2.1 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. Action: Select the dropdown for the Navigation Category: Offering category.
3. Action: Select Section: Enrollments from the dropdown.

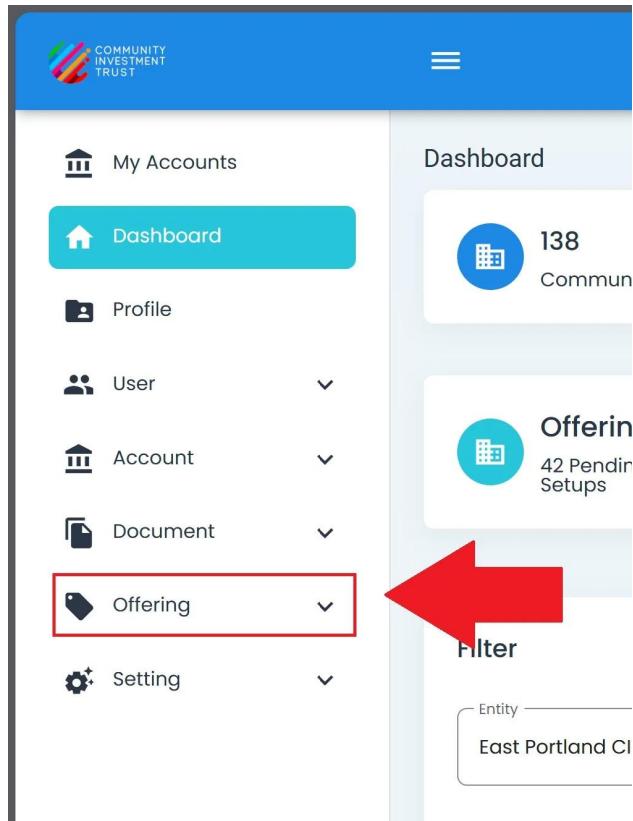


Fig. 63: Offering, Enrollments Primary Sidenav Location

The screenshot shows the 'Offering, Enrollments' homepage. The sidebar menu is identical to Fig. 63, with 'Offering' expanded to show 'Offerings' and 'Enrollments'. The 'Enrollments' menu item is highlighted with a red box and a red arrow points to it from the right. The main content area is titled 'Enrollments' and includes a 'Filter' section with a dropdown set to 'Community Investment Trust' and a 'Search' input field. Below the filter is a table listing enrollment details:

Account ID	Investor	Monthly With
126	Thomas Thompson thomas.thompson@tolinvestcit.com	
150	Tom Cruise tomcruise@tol.com (503) 720-2853	1st for \$25.00
63	Travis Hanson travis.hanson@tolinvestcit.com	
185	Uy Test john232@transferonline.com (503) 720-2853	
186	uy test2 johnnt33@transferonline.com (503) 720-2853	
45	Valerie Carney valerie.carney@tolinvestcit.com	
99	William Cruz william.cruz@tolinvestcit.com	
57	William Miller william.miller@tolinvestcit.com	

Fig. 64: Offering, Enrollments Homepage

2.7.2.2 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 Table: Enrollments table.

2.7.2.2.1 Enrollments Table

The Table: Enrollments table provides a comprehensive overview of the Enrollment Statuses of each Item: Investor in the system.

Contents

- *Enrollments Table*
 - *Columns: Enrollments Table*
 - *Available Enrollment Statuses*

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex Williams								Holding - Eligible
39	Allison Anderson	alison.anderson@tollinvestcit.com							Holding - Eligible
125	Coley Hall	coley.hall@tollinvestcit.com							Holding - Not Eligible
119	Chad Ballard	chad.ballard@tollinvestcit.com							Holding - Not Eligible
61	Elizabeth Marshall	elizabeth_marshall@tollinvestcit.com							Holding - Eligible
50	Gary Palmer	gary.palmer@tollinvestcit.com							Holding - Eligible
--	Jennifer Allen								

Fig. 65: Offering, Enrollments, Enrollments Table, Columns Explained

Columns: Enrollments Table

The Column: Columns for the Table: Enrollments table can be found at the top of the table:

The Table: Enrollments table will have the following columns:

- Column: Account ID
- Column: Investor
- Column: Monthly Whiteboard
- Column: Heading for Whiteboard
- Column: A2P Processing
- Column: Avoiding Share Resource
- Column: Investment Amount
- Column: Shares

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alexis Williams								Holding - Eligible
39	Allison Anderson								Holding - Eligible
125	Colee Hall								Holding - Not Eligible
119	Chad Ballard								Holding - Not Eligible
61	Elizabeth Marshall								Holding - Eligible
60	Gary Palmer								Holding - Eligible
--	Jennifer Allen								

Fig. 66: Offering, Enrollments, Enrollments Table, Columns

- Column: Hold Investment/Cashout
- Column: Status

Available Enrollment Statuses

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

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

Using Enrollments Filters

To Filter Enrollments:

1. Find the Item: Sponsor Organization dropdown.

2. Click on the dropdown to see available filter options.

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



Fig. 67: Offering, Enrollments, Sponsor Organization Filter Location

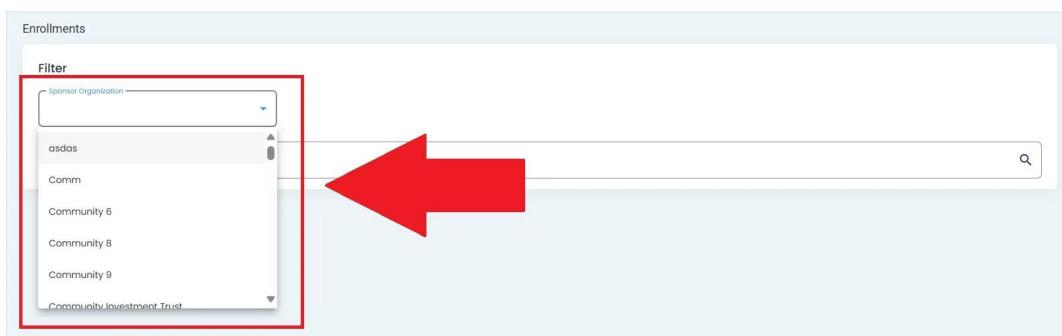


Fig. 68: Offering, Enrollments, Filter Dropdown Options

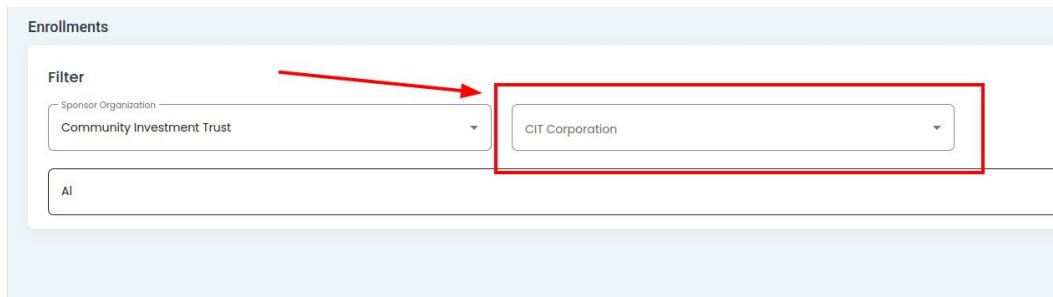


Fig. 69: Offering, Enrollments, Filter Selection Results With Two Dropdowns

Note

Two dropdowns will appear if the selected Item: Sponsor Organization has only one Item: 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).

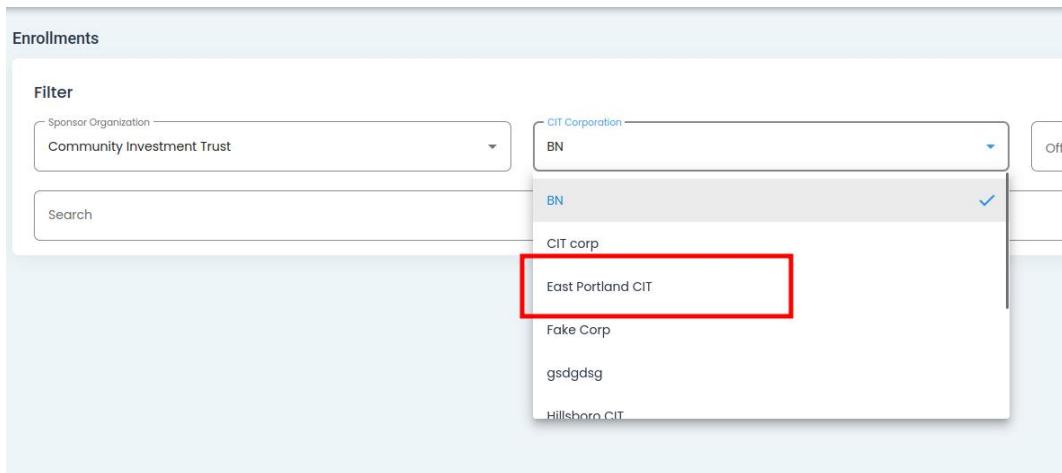


Fig. 70: Offering, Enrollments, CIT Corporation Filter Selection

After selecting, the Item: Offering and Item: Status dropdowns will appear.

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

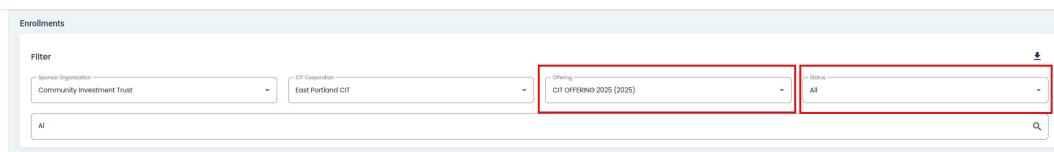


Fig. 71: Offering, Enrollments, Offering and Status Dropdowns Appear

4. Select the Offering

1. Find and Action: Select the Item: Offering dropdown.

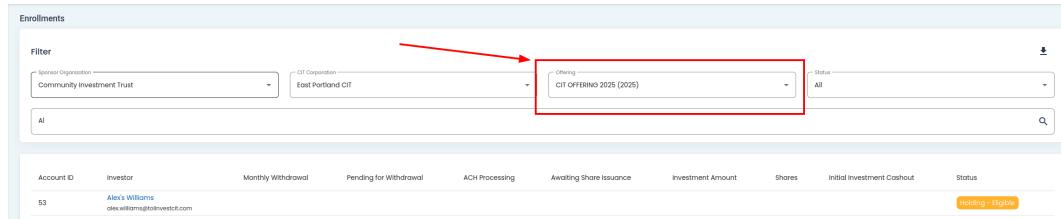


Fig. 72: Offering, Enrollments, Offering Dropdown Location

2. Action: Select an offering from the offering dropdown.



Fig. 73: Offering, Enrollments, Offering Dropdown Selection

5. Select the Status

1. Find and Action: Select the Item: Status dropdown.
2. Action: Select a status from the status dropdown.

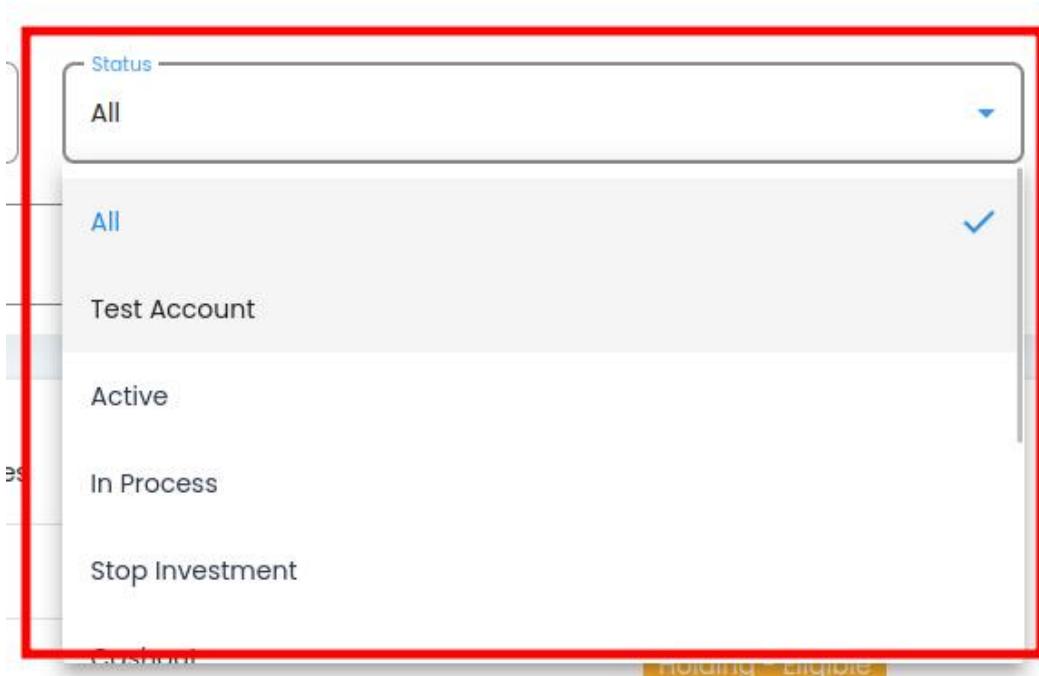


Fig. 74: Offering, Enrollments, Status Dropdown Location

Enrollments						
Filter						
Sponsor Organization	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Actions	Count
Community Investment Trust	Alex's Williams alex.williams@tolinvestcit.com					C
East Portland CIT	Allison Anderson allison.anderson@tolinvestcit.com					C
	Search					
53	Alex's Williams alex.williams@tolinvestcit.com					A1
39	Allison Anderson allison.anderson@tolinvestcit.com					A1
92	Amanda Castillo amanda.castillo@tolinvestcit.com					A1
51	Arthur Murphy arthur.murphy@tolinvestcit.com					A1
73	Austin Gilbert austin.gilbert@tolinvestcit.com					A1

Fig. 75: Offering, Enrollments, Search Bar Location

Available Statuses

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

Using Enrollments Search

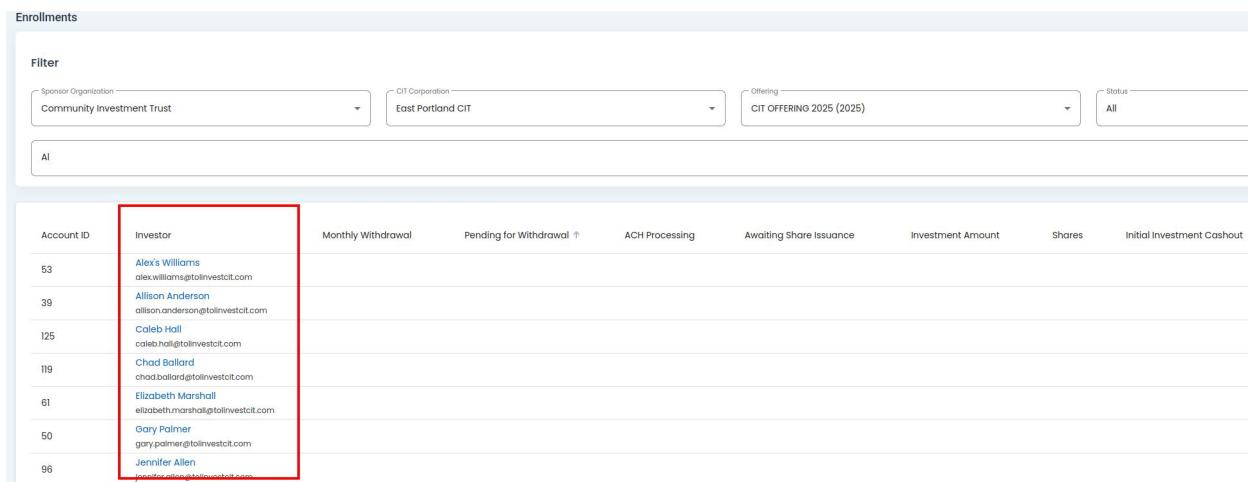
This section covers how search for Investors in the Table: Enrollments table works and what the options are.

Using Filters for Enrollments Table

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

Possible Search Options: Enrollemts Table

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



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 chadballard@tolinvestcit.com							
61	Elizabeth Marshall elizabeth_marshall@tolinvestcit.com							
50	Gary Palmer gary.palmer@tolinvestcit.com							
96	Jennifer Allen jennifer.allen@tolinvestcit.com							

Fig. 76: Offering, Enrollments, Search Column Highlighted

How To: Search for Investors

To Search for Investors:

1. Place your cursor in the search bar.
2. Type the name of the Item: Investor to see their Option: Status and overview.

Enrollments								
Filter								
Sponsor Organization	Community Investment Trust	CIT Corporation	East Portland CIT	Offering	CIT OFFERING 2025 (2025)	Status	All	
								
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@tolinwestcit.com							
39	Allison Anderson allison.anderson@tolinwestcit.com							
125	Caleb Hall caleb.hall@tolinwestcit.com							

Fig. 77: Offering, Enrollments, Search Bar Location

Search Results Automatically Populate

When you type in the search bar, the search results will automatically populate.

Enrollments								
Filter								
Sponsor Organization	Community Investment Trust	CIT Corporation	East Portland CIT	Offering	CIT OFFERING 2025 (2025)	Status	All	
								
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@tolinwestcit.com							
39	Allison Anderson allison.anderson@tolinwestcit.com							
125	Caleb Hall caleb.hall@tolinwestcit.com							
119	Chad Ballard chad.ballard@tolinwestcit.com							
61	Elizabeth Marshall elizabeth.marshall@tolinwestcit.com							
50	Gary Palmer gary.palmer@tolinwestcit.com							
96	Jennifer Allen jennifer.allen@tolinwestcit.com							

Fig. 78: Offering, Enrollments, Search Example, Name in Field

- Action: Click the Item: Investor to view their *Investor Details*.

2.8 Investment

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

Contents

- *Investment*
 - *Investments Homepage Location*

- *Investments List Table Overview*
- *Using Investments Filters*

2.8.1 Investments Homepage Location

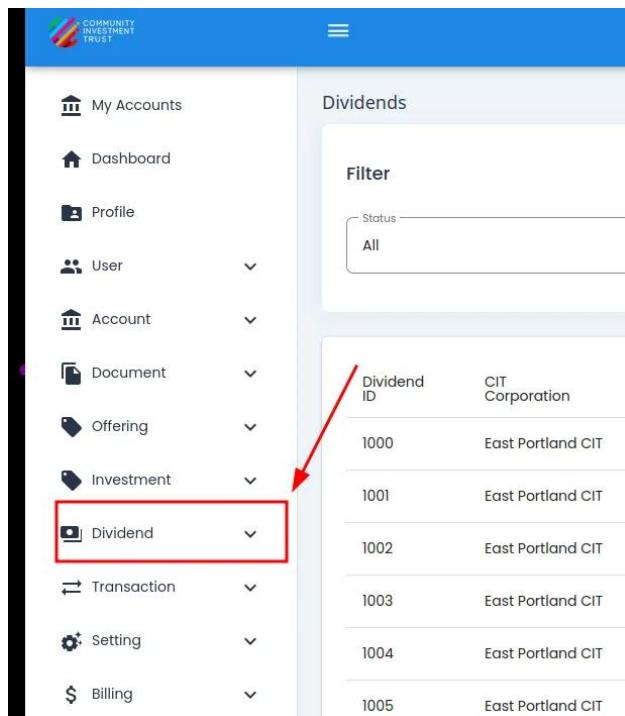
To Find the Investments List Homepage:

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 Navigation Category: Investment category.



The screenshot shows the CIT Services user interface. On the left is a primary sidebar with a blue header and a black vertical bar. The sidebar contains the following navigation items with dropdown arrows:

- My Accounts
- Dashboard
- Profile
- User
- Account
- Document
- Offering
- Investment
- Dividend
- Transaction
- Setting
- Billing

The "Dividend" item is highlighted with a red box and has a red arrow pointing to it from the text in the previous step. To the right of the sidebar is the main content area. The title "Dividends" is at the top, followed by a "Filter" section with a dropdown set to "All". Below that is a table with the following data:

Dividend ID	CIT Corporation
1000	East Portland CIT
1001	East Portland CIT
1002	East Portland CIT
1003	East Portland CIT
1004	East Portland CIT
1005	East Portland CIT

Fig. 79: Investment Category, Primary Sidenav Location

3. Select Section: Investments from the dropdown.

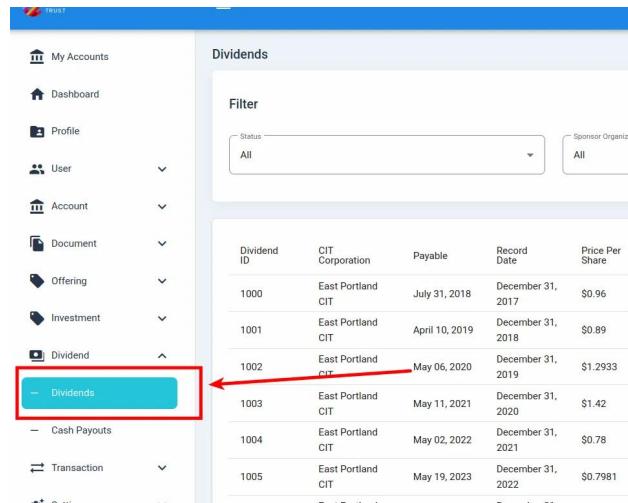


Fig. 80: Investment, Investments, Primary Sidenav Location

2.8.2 Investments List Table Overview

The Table: Investments List table is what first appears on the homepage of the Section: Investments section.

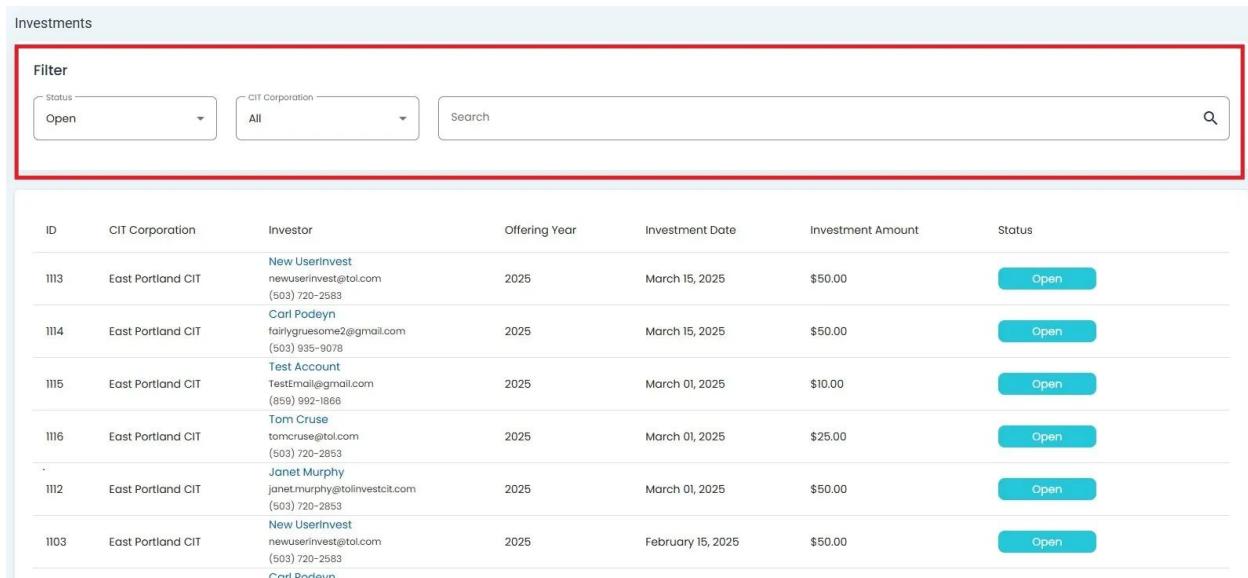
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
New UserInvest						
1113	East Portland CIT	New UserInvest (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruise tomcruise@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	2025	February 15, 2025	\$50.00	Open
		Carl Podeyn				

Fig. 81: Investment, Investments List Table

2.8.3 Using Investments Filters

To Filter Investments:

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

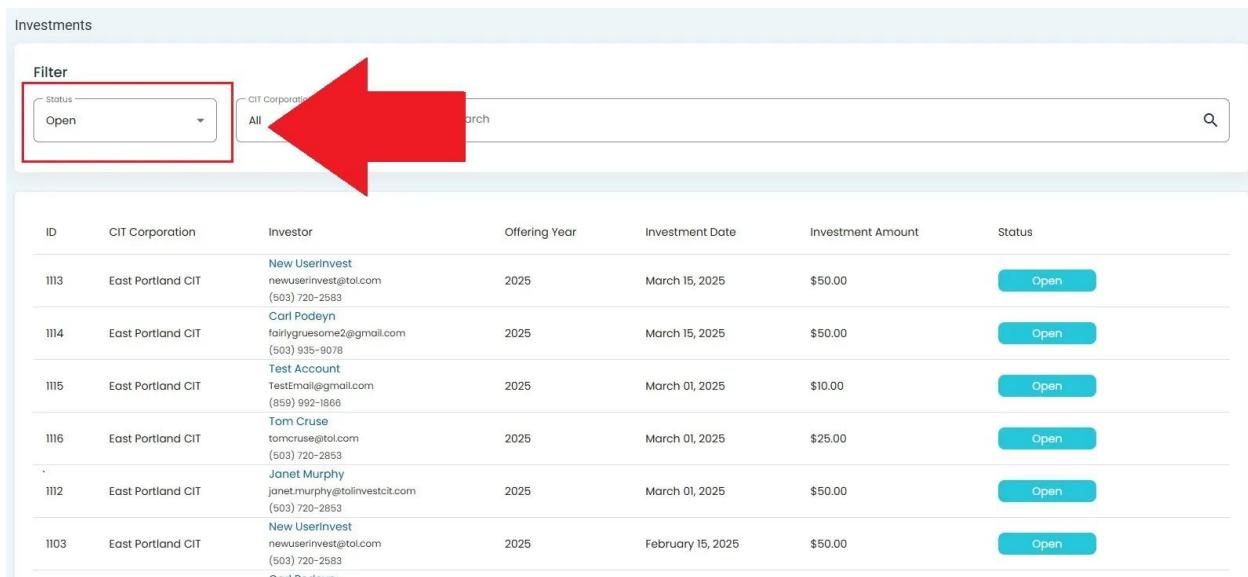


The screenshot shows a table titled 'Investments'. At the top, there is a 'Filter' section containing three dropdown menus: 'Status' (set to 'Open'), 'CIT Corporation' (set to 'All'), and a 'Search' input field with a magnifying glass icon. Below the filter section is a table with the following data:

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 Cruise tomcruise@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
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn				

Fig. 82: Investments Table Filter Section Highlighted

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



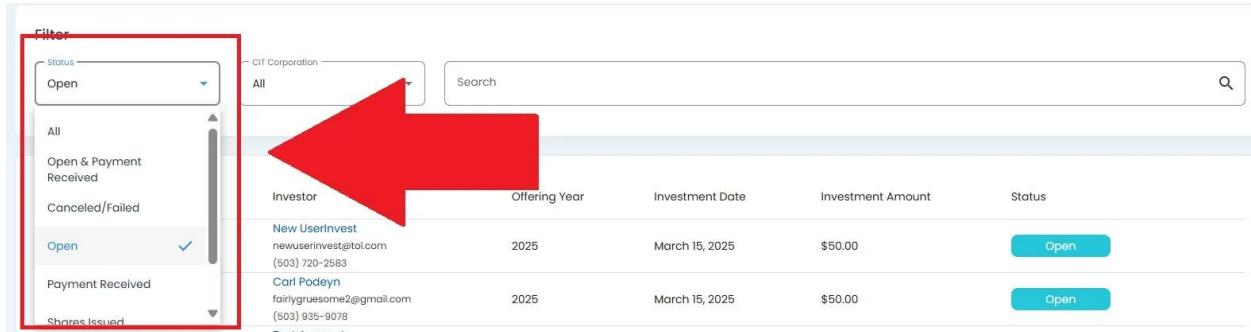
The screenshot shows the same 'Investments' table as Fig. 82. A large red arrow points from the text 'Click on the Status dropdown to filter by status.' to the 'Status' dropdown menu in the 'Filter' section. The 'Status' dropdown is currently set to 'Open'. The table data is identical to Fig. 82.

Fig. 83: Investments Status Dropdown Location

The status dropdown will expand, showing available status options:

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

The dropdown will expand, showing available organization options:



Investments

Filter

Status: Open

CIT Corporation: All

Search:

Investor: New UserInvest (newuserinvest@tol.com (503) 720-2583)

Offering Year: 2025

Investment Date: March 15, 2025

Investment Amount: \$50.00

Status: Open

Investor: Carl Podey (fairlyguesome2@gmail.com (503) 935-9078)

Offering Year: 2025

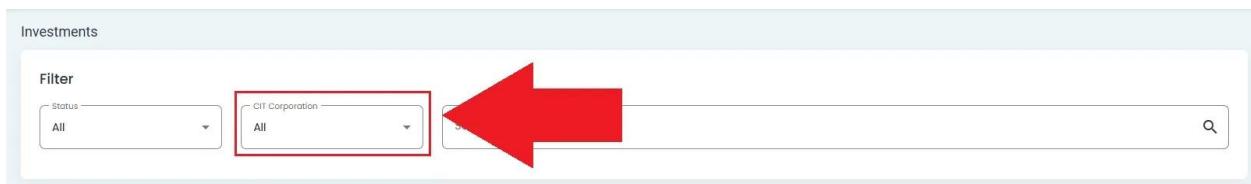
Investment Date: March 15, 2025

Investment Amount: \$50.00

Status: Open

Test Account

Fig. 84: Investments Status Dropdown Expanded



Investments

Filter

Status: All

CIT Corporation: All

Search:

Fig. 85: CIT Corporation Dropdown Location



Investments

Filter

CIT Corporation: All

Search:

Investor: All (selected)

Offering Year

Investment Date

Investment Amount

Status

Fig. 86: CIT Corporation Dropdown Expanded

4. Click the search icon to apply filters.

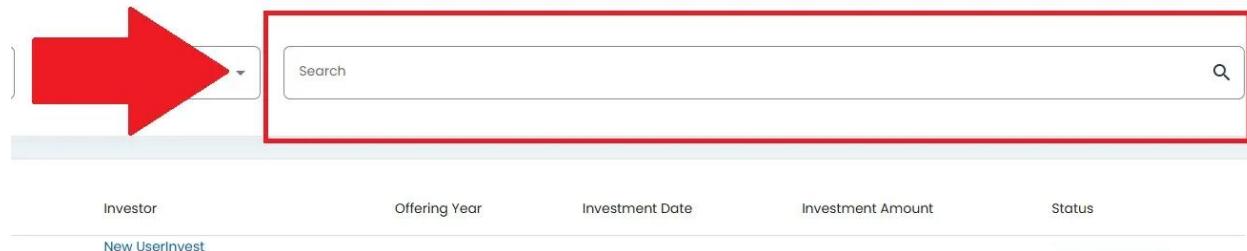


Fig. 87: Search Icon Location

Your filtered results will appear:

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

Fig. 88: Search Results

2.8.3.1 Investor Summary

2.8.3.2 Monthly and Quarterly Investment Summary

2.9 Communication

Welcome to the Section: Communication section.

2.10 Dividend

The following Section: Sections are included in the Dividend category:

- *Dividends*
- *Cash Payouts*

2.10.1 Dividends

The Section: Dividends 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*

2.10.1.1 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. Action: Select the dropdown for the Navigation Category: Dividend category.
3. Action: Select Section: Dividends from the dropdown.

2.10.1.2 Dividends List Table

The Table: Dividends List table is what first appears on the homepage of the Section: Dividends section.

2.10.1.3 Columns: Dividends List Table

The Table: Dividends List table has the following Column: Columns:

- Column: Dividend: The dividend identifier or name
- Column: CIT Corporation: The corporation associated with the dividend
- Column: Payable: The date when the dividend is payable
- Column: Record Date: The date of record for the dividend
- Column: Price Per Share: The amount paid per share
- Column: Total Shares: The total number of shares eligible for the dividend

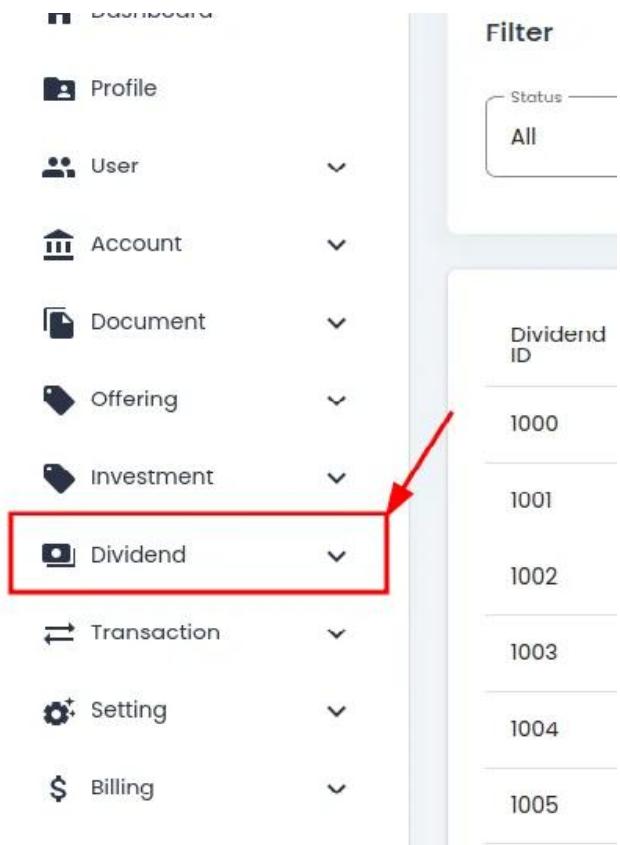


Fig. 89: Dividend Category, Primary Sidenav, Dropdown Location

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

Fig. 90: Dividend, Dividends Homepage, Primary Sidenav Location

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	11,655.548	\$19.24	\$4.20	7	Pending	

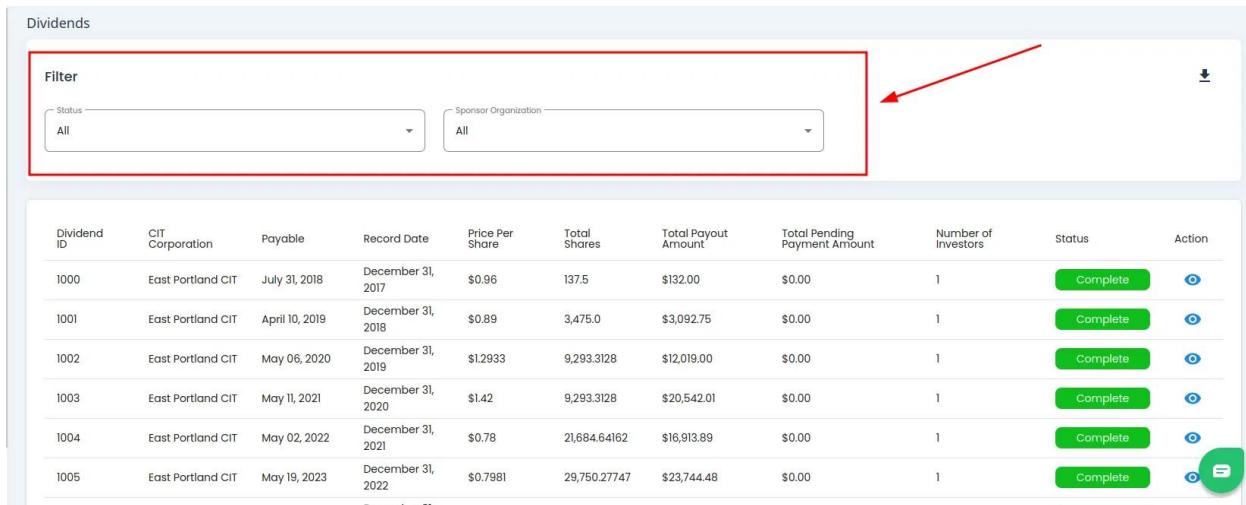
Fig. 91: Dividends Homepage

- Column: Total Payout Amount: The total amount to be paid for all shares
- Column: Total Pending Payment Amount: The amount still pending payment
- Column: Number of Investors: The number of investors receiving the dividend
- Column: Status: The current status of the dividend (e.g., Complete)
- Column: Action: Available actions for the dividend

2.10.1.4 Using Dividends Filters

To Filter Dividends:

1. Locate the filter section above the table.



The screenshot shows a table titled 'Dividends' with a 'Filter' section at the top. The 'Filter' section contains two dropdown menus: 'Status' (set to 'All') and 'Sponsor Organization' (set to 'All'). A red box highlights this filter section, and a red arrow points to it from the left. The main table below has columns: Dividend ID, CIT Corporation, Payable, Record Date, Price Per Share, Total Shares, Total Payout Amount, Total Pending Payment Amount, Number of Investors, Status, and Action. The table contains six rows of data, each with a 'Complete' status and a green circular icon with a white 'C'.

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	

Fig. 92: Dividends Table Filter Section Highlighted

2.10.1.5 How to: Filter by Status

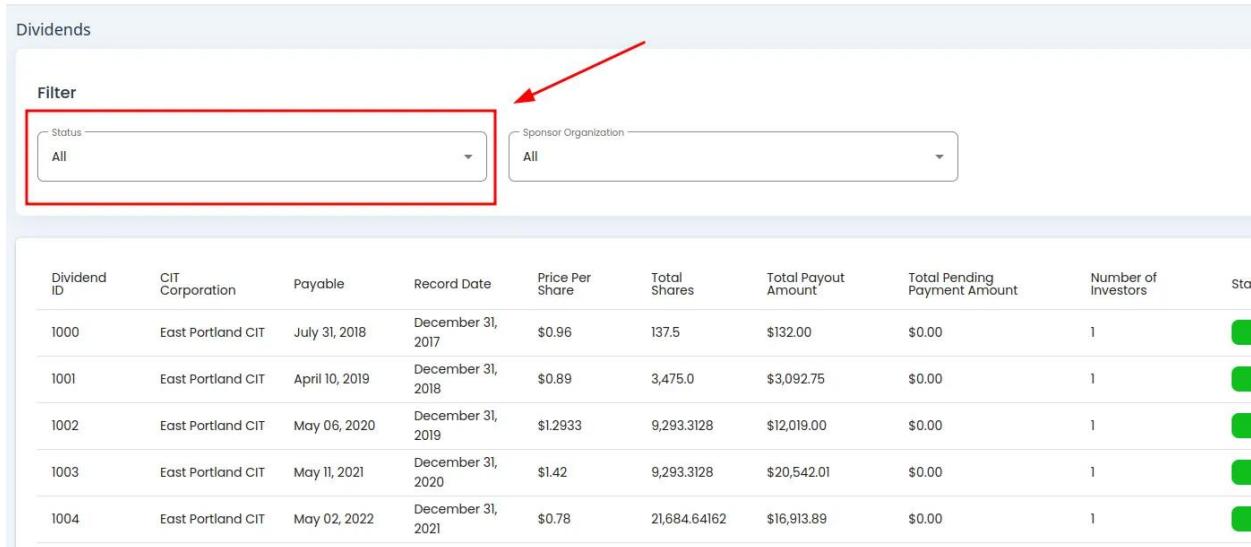
1. Find and Action: Click on the Item: Status dropdown located above the table.
2. Action: Select the Item: Status you want to filter by from the dropdown.

2.10.1.6 How to: Filter by Sponsor Organization

1. Find and Action: Click on the Item: Sponsor Organization dropdown.
2. Action: Select the Item: Sponsor Organization you want to filter by from the dropdown.

Dividends

Filter



Status: All

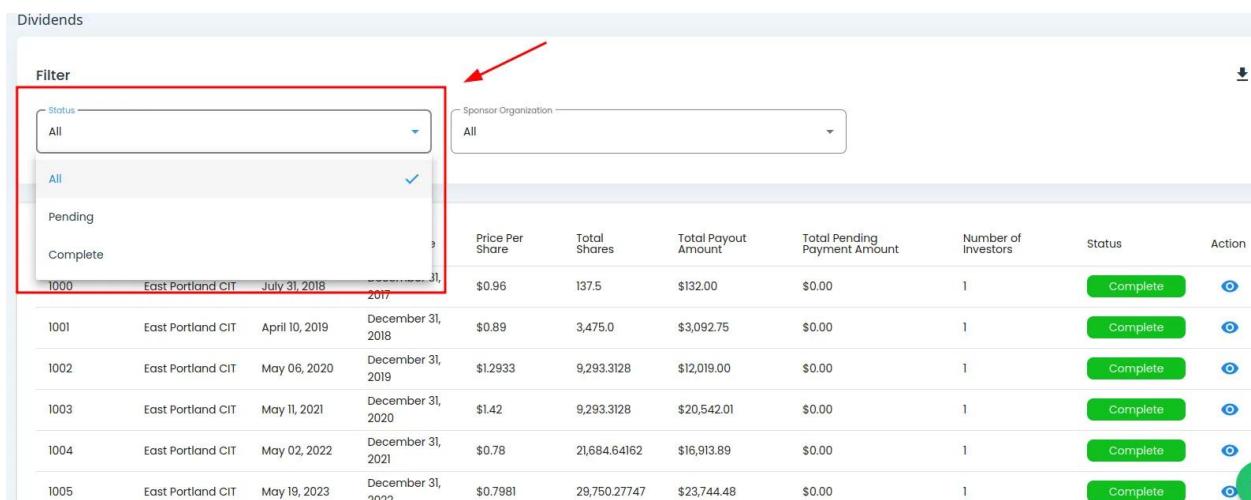
Sponsor Organization: All

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

Fig. 93: Dividends, Status Dropdown Location

Dividends

Filter

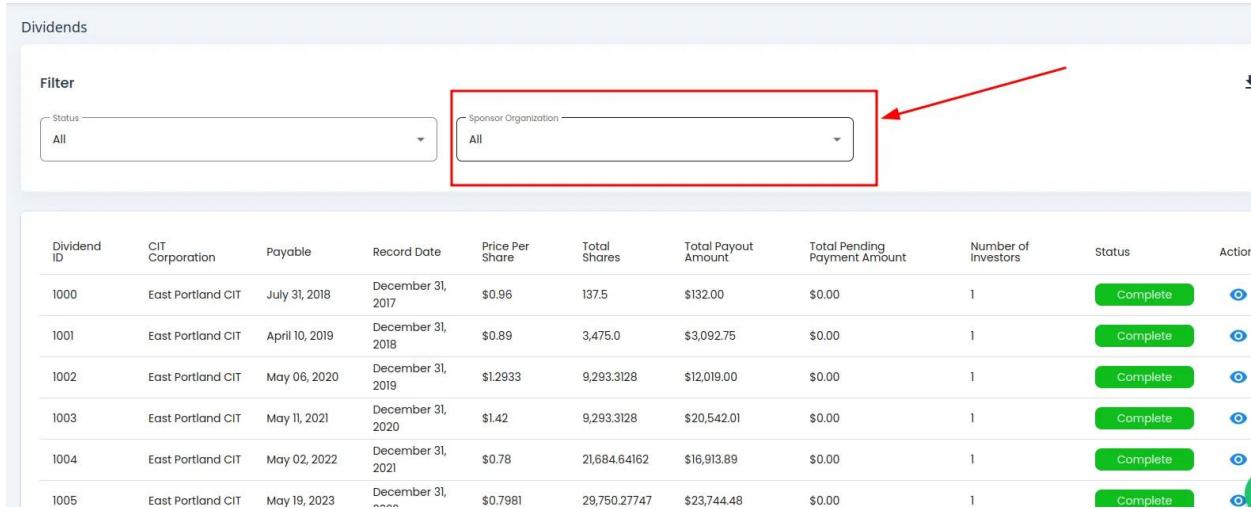


Status: All

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	

Fig. 94: Dividends, Status Dropdown Expanded

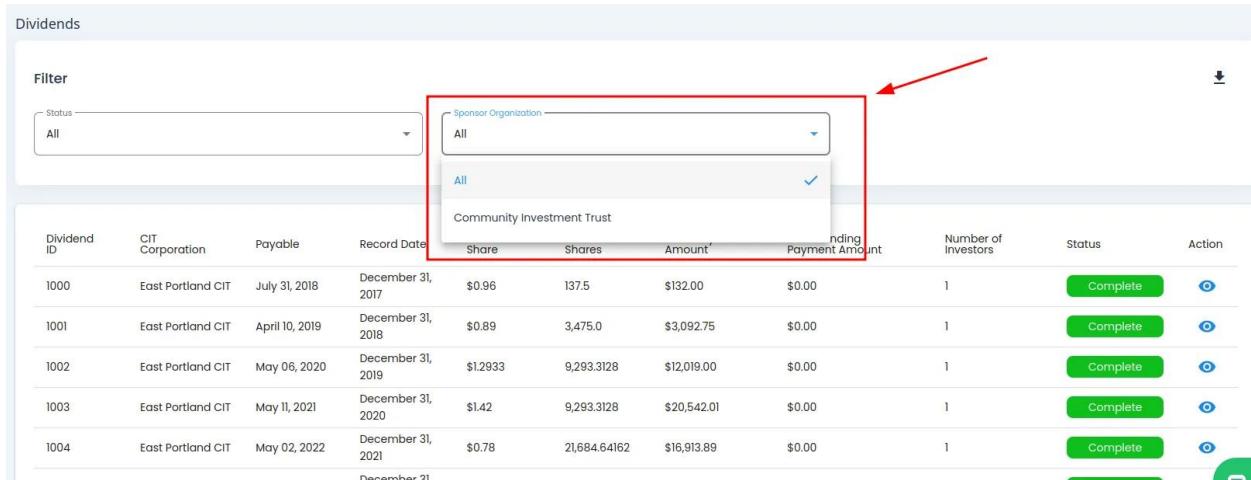


Dividends

Filter

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	<input type="radio"/>
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	<input type="radio"/>
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	<input type="radio"/>
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	<input type="radio"/>
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	<input type="radio"/>
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	<input type="radio"/>

Fig. 95: Sponsor Organization Dropdown Location



Dividends

Filter

Dividend ID	CIT Corporation	Payable	Record Date	Share	Shares	Amount*	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	<input type="radio"/>
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	<input type="radio"/>
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	<input type="radio"/>
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	<input type="radio"/>
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	<input type="radio"/>

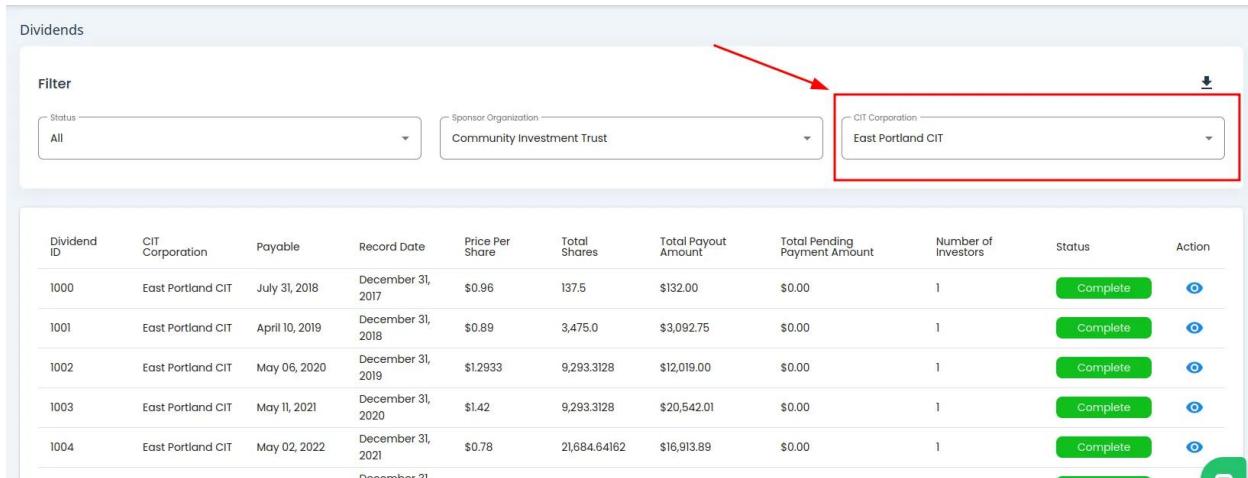
Fig. 96: Sponsor Organization Dropdown Expanded

2.10.1.7 How to: Filter by CIT Corporation

CIT Corporation Filter Availability

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

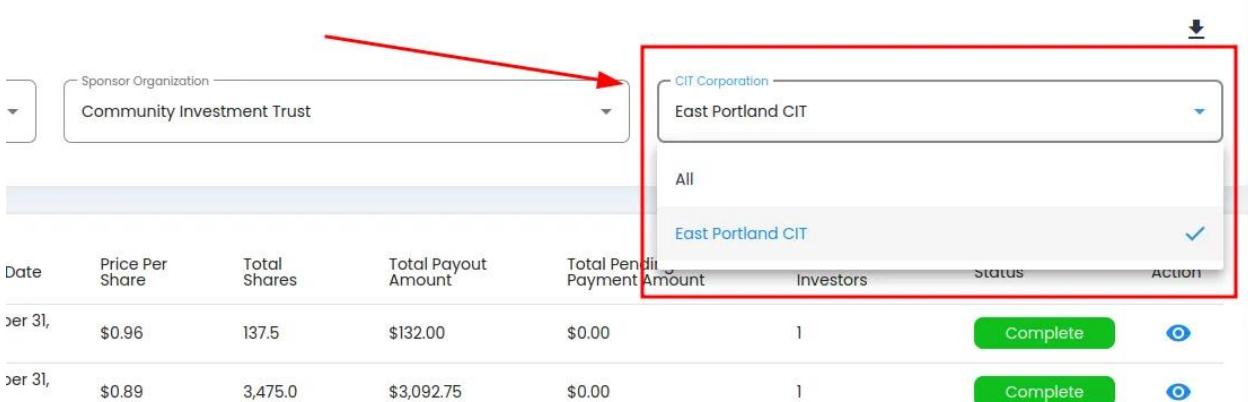
1. Find and Action: Click on the Item: CIT Corporation dropdown.



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	2,684.64162	\$16,913.89	\$0.00	1	Complete	

Fig. 97: CIT Corporation Dropdown Location

2. Action: Select the Item: 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
July 31, 2018	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
April 10, 2019	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	

Fig. 98: CIT Corporation Dropdown Expanded

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

2.10.2 Cash Payouts

The Section: 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*

2.10.2.1 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 Navigation Category: Dividend category.
3. Select Section: Cash Payouts from the dropdown.

2.10.2.2 Cash Payouts List Table

The Table: Cash Payouts List table is what first appears on the homepage of the Section: Cash Payouts section.

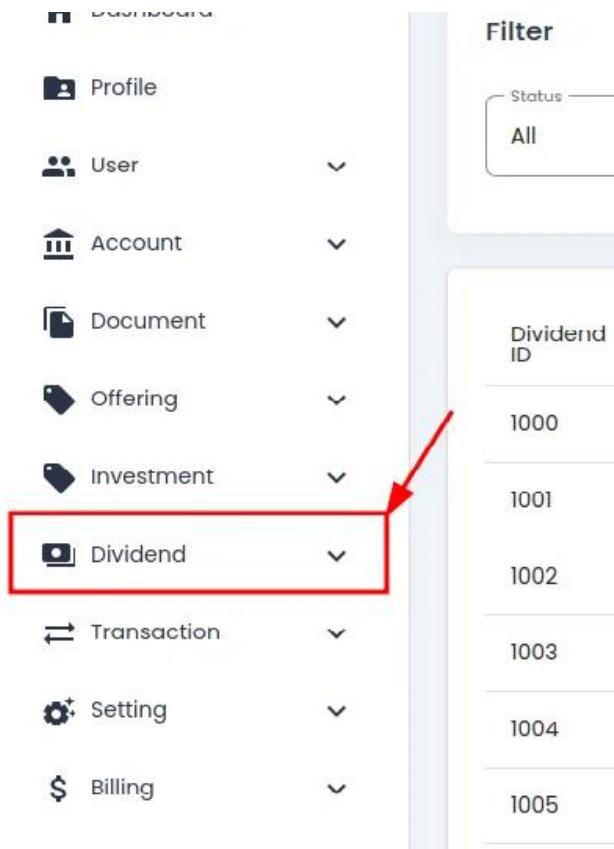
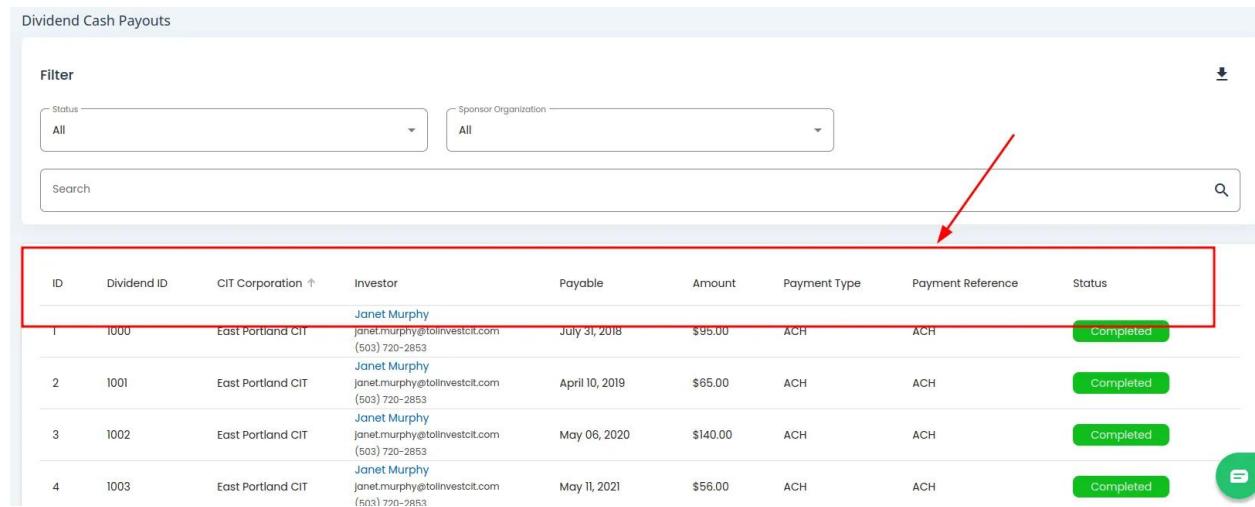


Fig. 99: Dividend Category, Primary Sidenav, Dropdown Location

The screenshot shows the CIT Services homepage for Dividend Cash Payouts. The 'Dividend' category is expanded, and the 'Cash Payouts' sub-item is highlighted with a red box and a red arrow points to it from the left. The main content area shows a table of Dividend Cash Payouts with columns: ID, Dividend ID, CIT Corporation, and Investor. The table lists 5 rows of data.

ID	Dividend ID	CIT Corporation	Investor
1	1000	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
2	1001	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
3	1002	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
4	1003	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
5	1004	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853

Fig. 100: Cash Payouts Homepage



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

Fig. 101: Cash Payouts List Table

2.10.2.3 Columns: Cash Payouts List Table

The Table: Dividend Cash Payouts table has the following Column: Columns:

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

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

1. Find the Column: Investor column in the Table: Dividend Cash Payouts table.
2. Click on the Item: Investor you wish to view details for.

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

You will be *redirected to the Investor Details page* once you click an Item: Investor's Name.

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	Payable	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 06, 2020	\$140.00	ACH	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 11, 2021	\$56.00	ACH	ACH

Fig. 102: Dividend, Cash Payouts, Investor Column

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	Payable	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 06, 2020	\$140.00	ACH	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 11, 2021	\$56.00	ACH	ACH

Fig. 103: Dividend, Cash Payouts, Investor Select Example

2.10.2.5 Using Cash Payouts Filters

To Filter Cash Payouts:

1. Locate the filter section above the table.

Dividend Cash Payouts

Filter

Status:

Sponsor Organization:

Search:

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

Fig. 104: Dividend, Cash Payouts, Filter Location

2.10.2.6 How to: Filter by Status

1. Find and Action: Click on the Item: Status dropdown, located above the Table: Cash Payouts List table.

Dividend Cash Payouts

Filter

Status:

Sponsor Organization:

Search:

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

Fig. 105: Cash Payouts, Status Dropdown, Location

2. Action: Select the Item: Status you want to filter by from the dropdown.

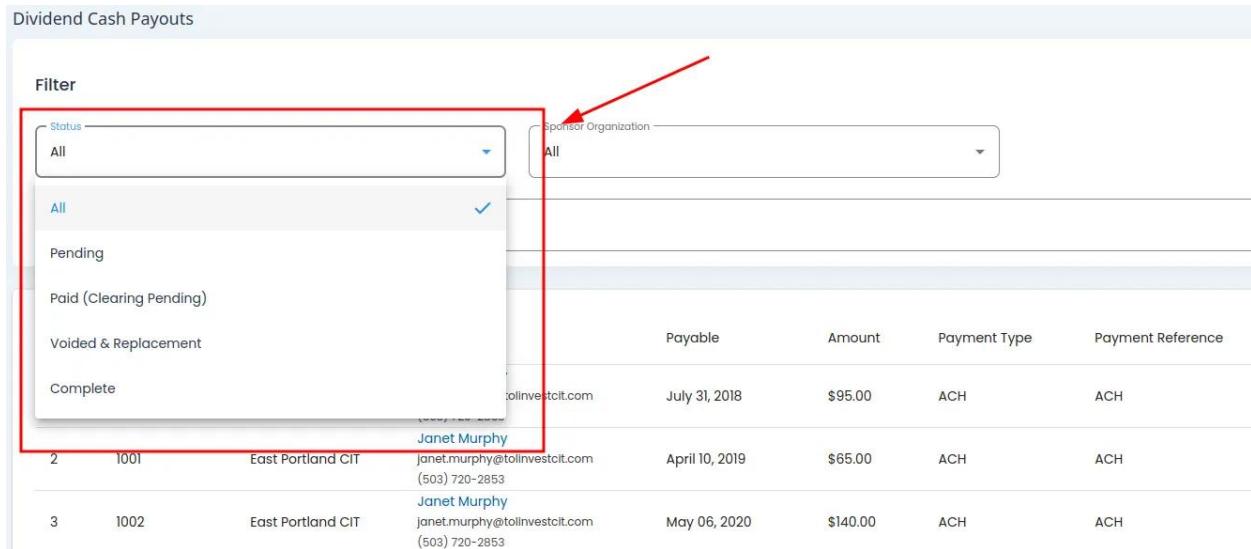


Fig. 106: Cash Payouts, Status Dropdown, Expanded

2.10.2.7 How to: Filter by Sponsor Organization

1. Find and Action: Click on the Item: Sponsor Organization dropdown.

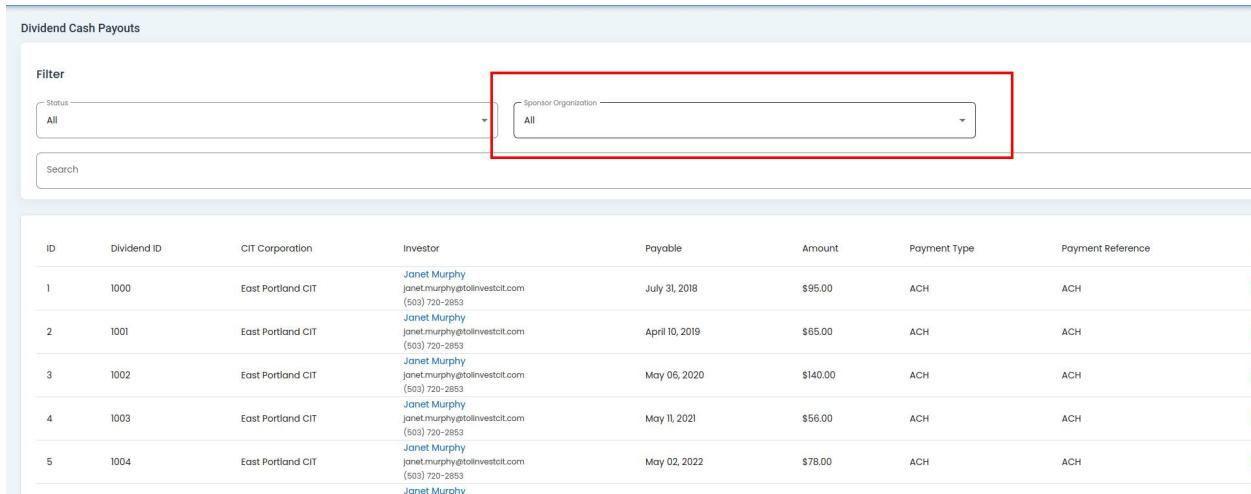
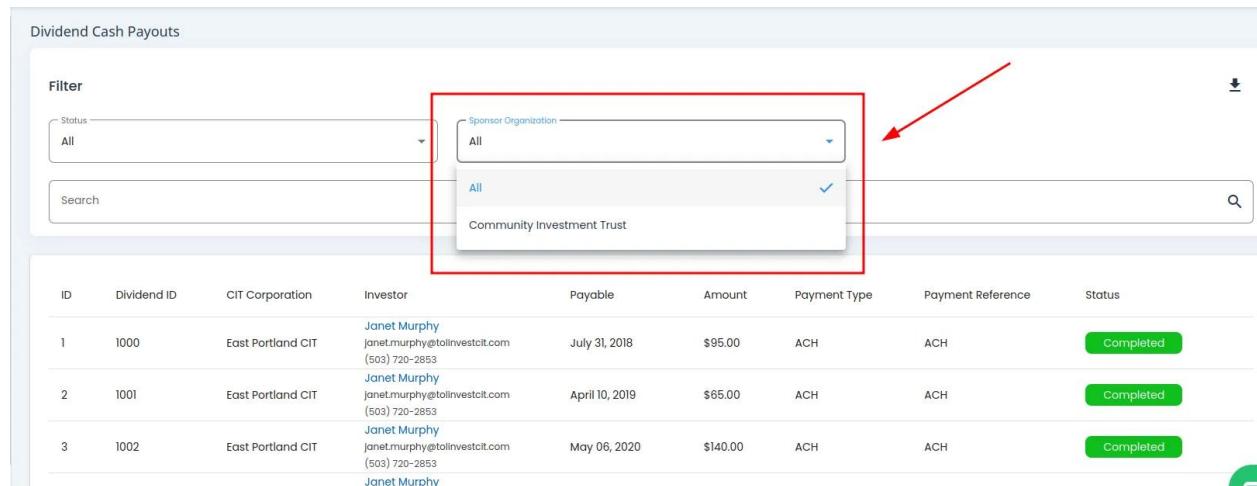


Fig. 107: Cash Payouts, Sponsor Organization Dropdown, Location

2. Action: Select the Item: Sponsor Organization you want to filter by from the dropdown.



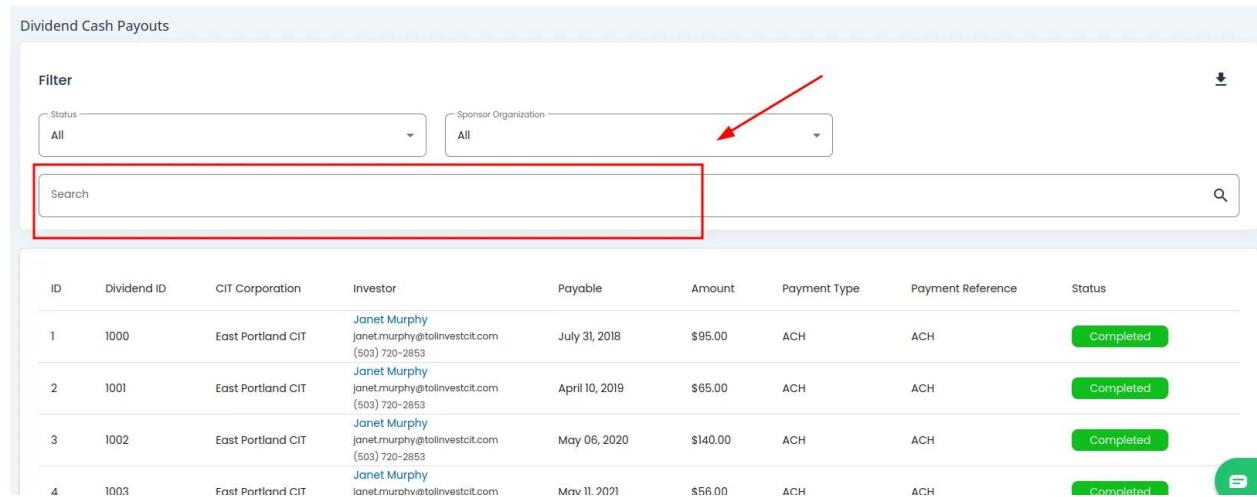
The screenshot shows a table of cash payouts. At the top left, there is a 'Filter' section with a 'Status' dropdown set to 'All' and a 'Search' input field. To the right of the search field is a dropdown menu for 'Sponsor Organization' with 'All' selected. A red box highlights this dropdown, and a red arrow points from the text 'Fig. 108: Cash Payouts, Sponsor Organization Dropdown, Expanded' to the box. The table below has columns: ID, Dividend ID, CIT Corporation, Investor, Payable, Amount, Payment Type, Payment Reference, and Status. The data in the table is as follows:

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
			Janet Murphy					

Fig. 108: Cash Payouts, Sponsor Organization Dropdown, Expanded

2.10.2.8 How to: Search for Cash Payout Information

1. Find and Action: Click on the Item: Search field.



The screenshot shows the same table of cash payouts. A red box highlights the 'Search' input field in the 'Filter' section. A red arrow points from the text 'Fig. 109: Cash Payouts, Search Bar, Location' to the search field. The table data is identical to Fig. 108.

Fig. 109: Cash Payouts, Search Bar, Location

2. Action: Type in the **Name of the Investor** you want to see Option: Cash Payouts for.

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

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

Dividend Cash Payouts							
Filter			Sponsor Organization				
ID	Dividend ID	CIT Corporation	Investor	Payoutable	Amount	Payment Type	Payment Reference
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 08, 2020	\$140.00	ACH	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH
5	1004	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 02, 2022	\$76.00	ACH	ACH
6	1005	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 19, 2023	\$80.00	ACH	ACH
7	1006	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 17, 2024	\$25.00	ACH	ACH
12	1007	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	February 28, 2025	\$0.84	ACH	ACH

Fig. 110: Cash Payouts, Search Bar, Search Example

2.10.2.9 How To: View More Information

1. Action: Click on the name of the Item: Investor you want to view more information for.

Investments							
Filter			CIT Corporation				
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status	
1113	East Portland CIT	NewUserInvest newuserinvest@totl.com (503) 720-2853	2025	March 15, 2025	\$50.00	Open	
1114	East Portland CIT	Test Account TestEmail@gmail.com (503) 720-2853	2025	March 15, 2025	\$50.00	Open	
1115	East Portland CIT	Tom Cruise tomcruise@totl.com (503) 720-2853	2025	March 01, 2025	\$10.00	Open	
1116	East Portland CIT	Tom Cruise tomcruise@totl.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open	
1112	East Portland CIT		2025	March 01, 2025	\$50.00	Open	
1113	East Portland CIT		2025	February 15, 2025	\$50.00	Open	
1114	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)	

Fig. 111: Cash Payouts, Investor Click

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

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

2.11 Transaction

The following Section: Sections can be found in the Transaction category:

- *Directives*
- *Complete Transactions*

2.11.1 Directives

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

- *Directives Homepage Location*
- *Directives List Table Overview*
- *Filtering the Directives List*

2.11.1.1 Directives Homepage Location

To Find the Directives List Homepage:

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

Don't see the sidenav?

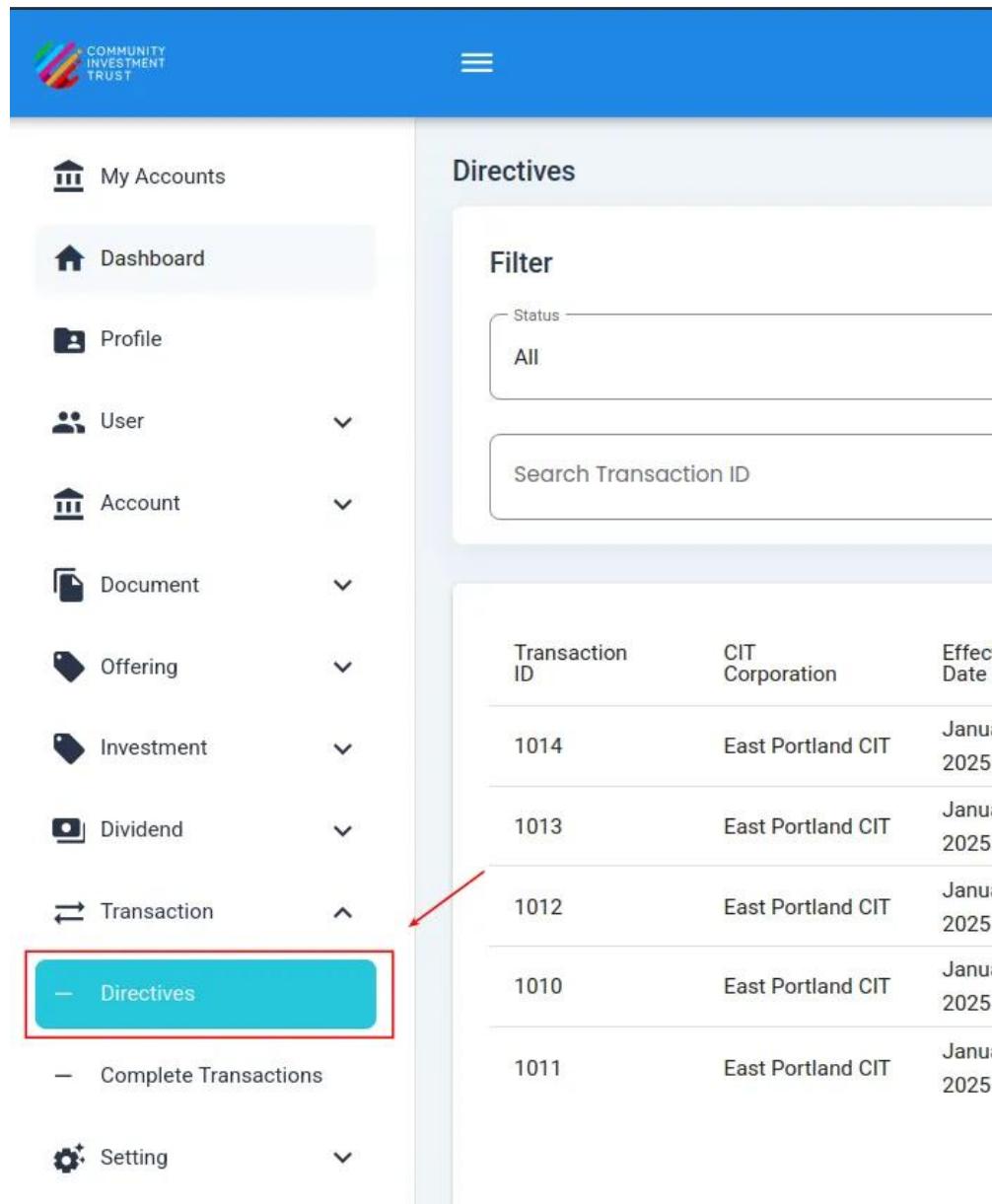
See How to Toggle Primary Sidebar for more information.

2. Select the dropdown for the Navigation Category: Transaction category.
3. Select Section: Directives from the dropdown.

2.11.1.2 Directives List Table Overview

The Table: Directives List table has the following Column: Columns:

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



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

Fig. 112: Directives Homepage

Directives									
Filter									
Status	All	Sponsor Organization	All						
Search Transaction ID									Q
Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
I014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
I013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
I012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
I010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
I011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Fig. 113: Directives List Table showing transaction directives with status indicators

2.11.1.3 Filtering the Directives List

The Table: Directives List can be filtered using either of the following options:

- *Status*
- *Sponsor Organization*

2.11.1.3.1 How to Filter by Status or Sponsor Organization

Follow the steps below to filter by status or sponsor organization:

- *Filter Section Location*
- *Status Filter Dropdown*
- *Sponsor Organization Filter Dropdown*
- *How to Search for Directives*

Filter Section Location

The filter section contains 2 different types of filters and one search bar, these include:

Directives									
Filter									
Status		Sponsor Organization		Search Transaction ID					
All									
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	

Fig. 114: Directives Table Filter Section with Status and Sponsor Organization filters

Status Filter Dropdown

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

Directives									
Filter									
Status		Sponsor Organization		Search Transaction ID					
All									
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	

Fig. 115: 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

Fig. 116: Status dropdown expanded showing All, Pending, Complete, and Rejected/Canceled options

Sponsor Organization Filter Dropdown

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

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	

Fig. 117: Sponsor Organization dropdown in the filter section

2. Select from available organization options:

How to Search for Directives

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

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

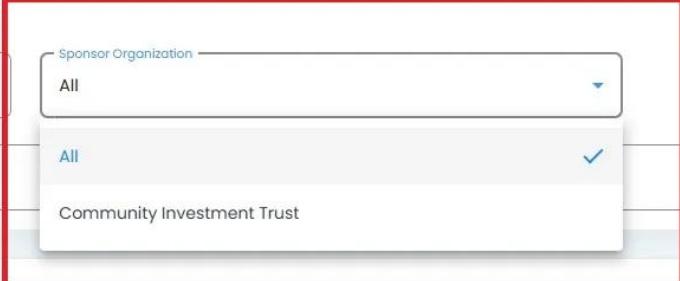
How to Use Wildcard (*) to Search for Multiple Transaction IDs

You can also use the * as a wildcard to search for multiple Transaction IDs:

2.11.1.3.2 Viewing Directive Details

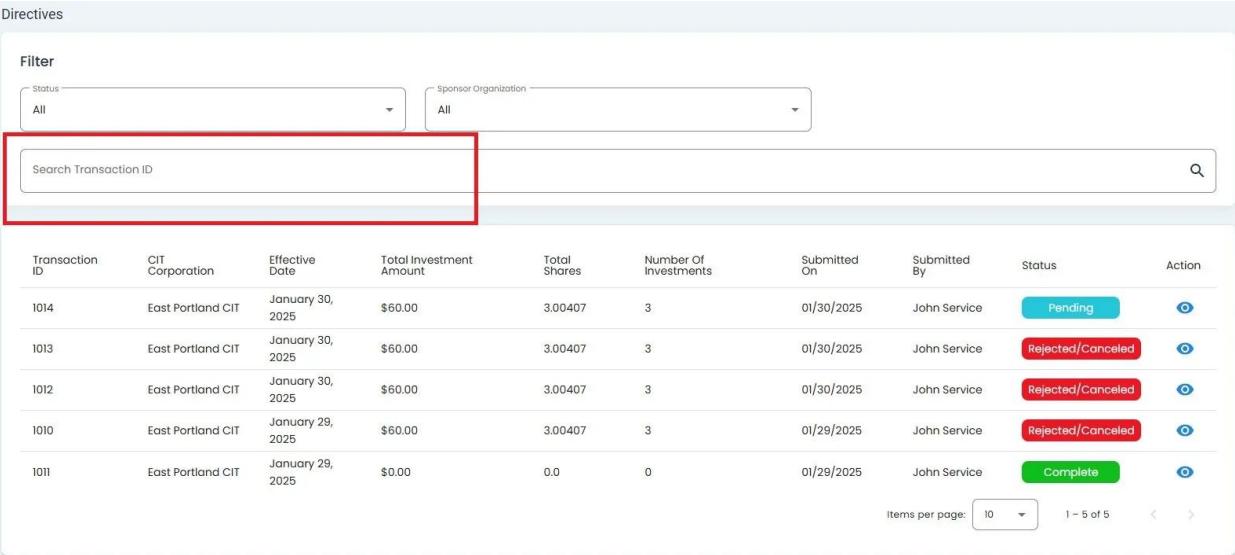
To view detailed information about a directive:

1. Locate the eye icon in the Action column for the directive you wish to view.
2. Click the eye icon to open the Directive Details screen.



Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status
January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending
January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected
January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected
January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected
January 29,	\$0.00	0.0	0	01/29/2025	John Service	Complete

Fig. 118: Sponsor Organization dropdown expanded showing All and Community Investment Trust options



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	○

Fig. 119: Search Bar for Transaction ID

Directives

Filter

Status	All	Sponsor Organization	All
<input type="text" value="1013"/> 			

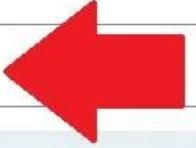
Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1013	CIT Corporation	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Cancelled	

Items per page: 10  1 - 1 of 1  

Fig. 120: Search Bar for Transaction ID with search results

Directives

Filter

Status	All	Sponsor Organization	All
<input type="text" value="101*"/> 			

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	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

Fig. 121: Search Bar for Transaction ID with wildcard search

Directives

Filter

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	 Rejected/Cancelled
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service  Rejected/Cancelled
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



Fig. 122: Eye icon in the Action column for viewing directive details

Directives

Filter

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/Cancelled	
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



Fig. 123: 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

2.11.2 Complete Transactions

The Section: Complete Transactions 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*

2.11.2.1 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 Navigation Category: Transaction category.
3. Select Section: Complete Transactions from the dropdown.

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	

Fig. 124: Complete Transactions Homepage

2.11.2.2 Complete Transactions List Table

The Table: Complete Transactions List table is what first appears on the homepage of the Section: Complete Transactions section.

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	

Fig. 125: Complete Transactions List Table

2.11.2.3 Columns: Complete Transactions List Table

The Table: Complete Transactions List table has the following Column: Columns:

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

2.11.2.4 Using Complete Transactions Filters

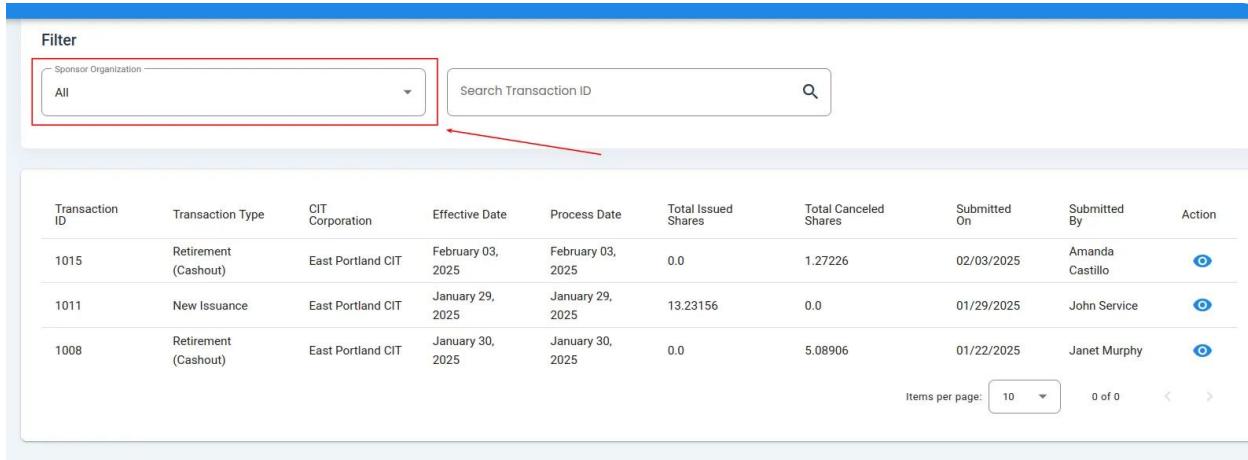
To Filter Complete Transactions:

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

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	

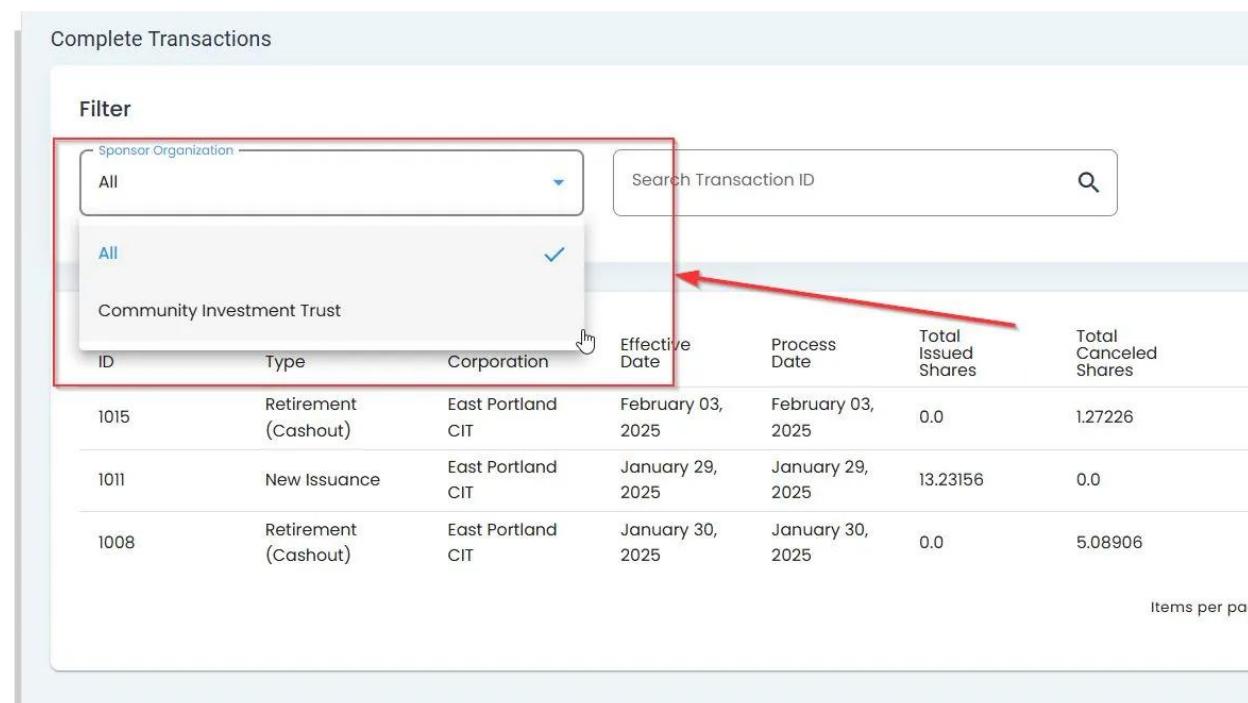
Fig. 126: Complete Transactions Table Filter Section Highlighted

2. Click on the Sponsor Organization dropdown to filter by organization.
3. Select the Sponsor Organization you wish to see the transactions for.
4. Select the Item: Search Transaction ID field.



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	

Fig. 127: Complete Transactions Status Dropdown Location



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

Fig. 128: Sponsor Organization, Dropdown Expanded

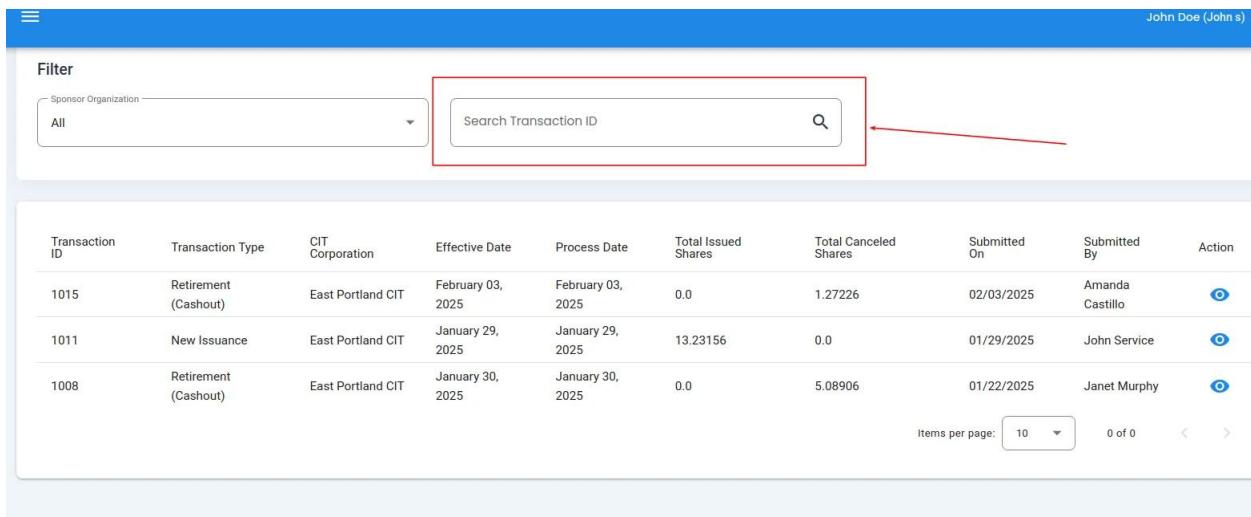


Fig. 129: Search Transaction ID Field Location

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

You can also use the * as a wildcard to search for multiple Transaction IDs:

2.12 Billing

The following Section: Sections are included in the Billing category:

- *Invoices*
- *Payments*

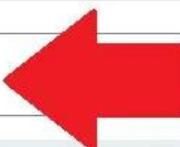
Directives

Filter

Status: All

Sponsor Organization: All

101*



Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Nur Inve
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

Fig. 130: Search Bar for Transaction ID with wildcard search

2.12.1 Invoices

The Section: Invoices 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 Zolqami	anass@transferonline.com	1	10/30/2024 @ 12:46 PM	Active	
Carl Podeyn	cpodeyn@transferonline.com	7	12/19/2024 @ 10:47 AM	Active	
John Doe	dlevey@transferonline.com	50	01/06/2025 @ 06:01 AM	Active	
John Service	c1@transferonline.com	304	12/21/2024 @ 01:49 PM	Active	
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	
Mohd Shoaib	mohd.shoaib@techahedcorp.com	268	01/06/2025 @ 05:19 AM	Active	
Pankaj OIT	pankaj.joshi@techahedcorp.com	0		Action Pending	

Staff Homepage # 

Need help finding the Staff Homepage? See [Staff Homepage Location](#) for more information.

💡 Hover for Page Preview Click to show ▾

2.12.1.1 Invoices Homepage

The Section: Invoices section opens up to the Table: 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	\$159	\$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	

Fig. 131: Billing, Invoices, Homepage

2.12.1.2 Columns: Invoices List Table

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

- Column: Invoice Number
- Column: Bill To
- Column: Type
- Column: Invoice Date
- Column: Amount
- Column: Status
- Column: Action

2.12.1.3 How to Download Invoices in PDF

To download invoices in PDF format:

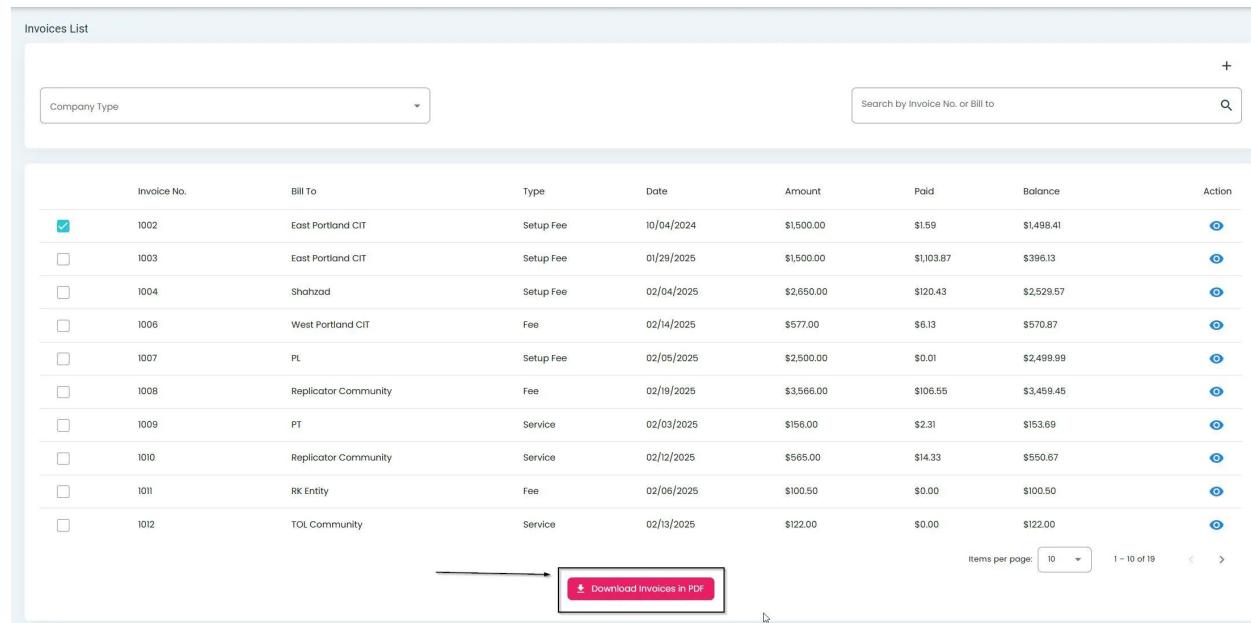
1. Select the checkboxes next to the invoices you want to download:
2. Click the Item: Download Invoices in PDF button:

Invoices List							
Company Type		Search by Invoice No. or Bill to					
Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input 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	\$1,03.87	\$398.13	
<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	

Fig. 132: Billing, Invoices, Columns Explained

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	\$1,03.87	\$398.13	
<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	

Fig. 133: Billing, Invoices, Selecting Invoices



The screenshot shows a table of invoices with the following data:

Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
I002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
I003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
I004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
I006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
I007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
I008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
I009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
I010	Replicator Community	Service	02/12/2025	\$566.00	\$14.33	\$550.67	
I011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
I012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page: 10 | 1 - 10 of 19

Download Invoices in PDF

Fig. 134: Billing, Invoices, Download PDF Button

2.12.1.4 How to Add an Invoice

To add a new invoice:

1. Click the Item: Add New Invoice button (plus sign):
2. Fill out the invoice form:

Note

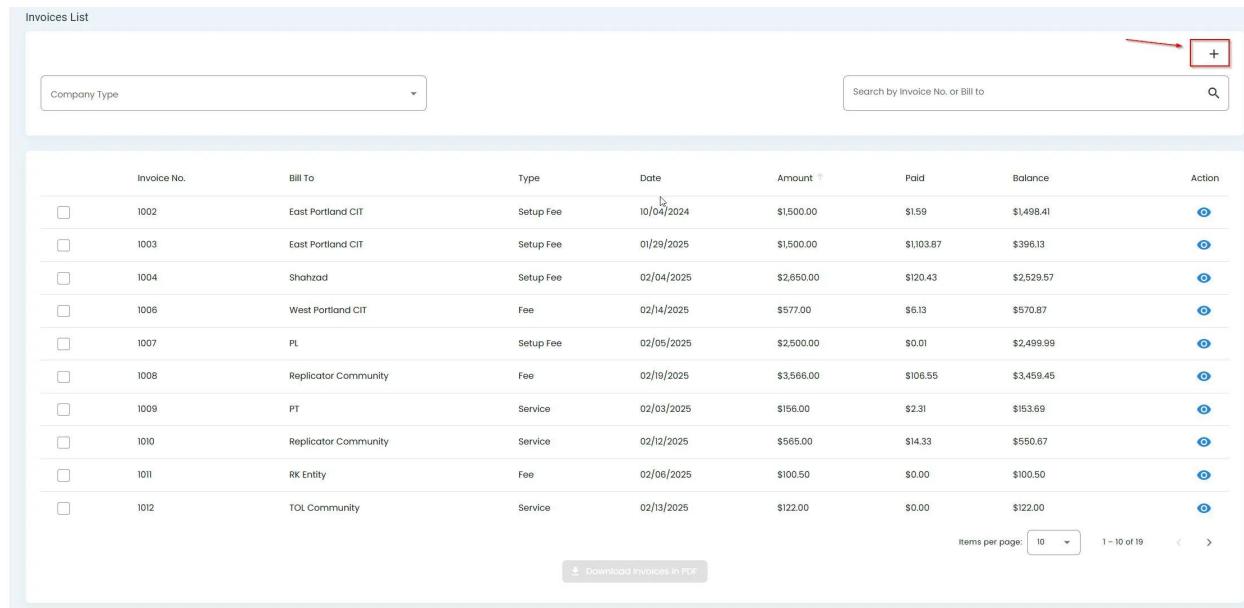
Item: All fields are requiredAll fields are required for creating a new invoice.

3. Complete all required information (example):

2.12.1.5 How to Add New Line Items

You can add multiple line items to an invoice:

1. Click the Item: Add Line Item button:
2. Fill out the details for the new line item:
3. The total will automatically update to reflect all line items:



Invoices List

Company Type

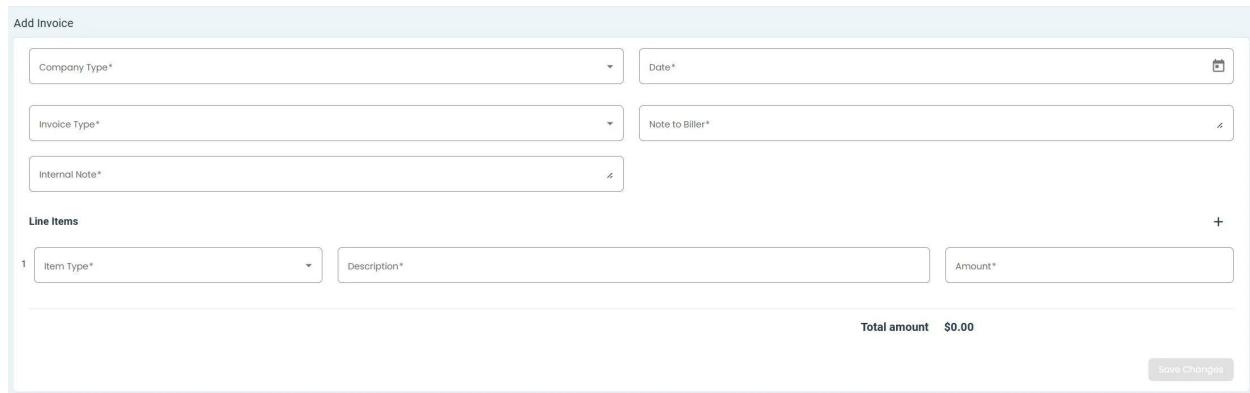
Search by Invoice No. or Bill to

Invoice No. **Bill To** **Type** **Date** **Amount** **Paid** **Balance** **Action**

1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,03.87	\$396.13	
1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
1010	Replicator Community	Service	02/12/2025	\$566.00	\$14.33	\$550.67	
1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page: 1 – 10 of 19

Fig. 135: Billing, Invoices, Add New Invoice Button



Add Invoice

Company Type*

Date*

Invoice Type*

Note to Biller*

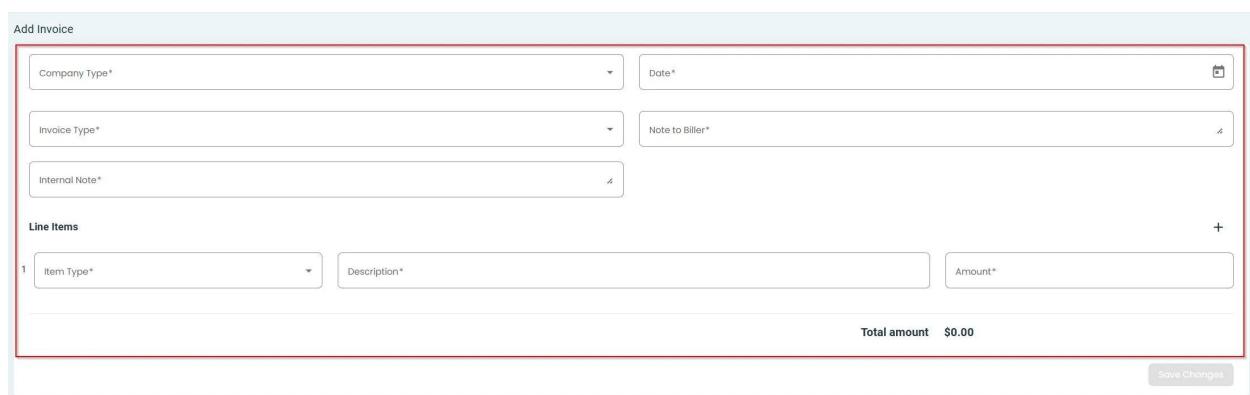
Internal Note*

Line Items

1	Item Type* <input type="button" value="▼"/>	Description* <input type="text"/>	Amount* <input type="text"/>
---	---	-----------------------------------	------------------------------

Total amount \$0.00

Fig. 136: Billing, Invoices, Add Invoice Form



Add Invoice

Company Type*

Date*

Invoice Type*

Note to Biller*

Internal Note*

Line Items

1	Item Type* <input type="button" value="▼"/>	Description* <input type="text"/>	Amount* <input type="text"/>
---	---	-----------------------------------	------------------------------

Total amount \$0.00

Fig. 137: Billing, Invoices, All Fields Required

The screenshot shows the 'Add Invoice' form with the following fields filled out:

- Company Type: Sponsor Organizations
- Date: 3/13/2025
- Company Accounts: Community Investment Trust
- 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: Post	Description: Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	Amount: \$500
---	-----------------	--	---------------
- Total amount: \$500.00
- Save Changes button

Fig. 138: Billing, Invoices, Example of Filled Out Form

The screenshot shows the 'Add Invoice' form with the following fields filled out:

- Company Type: Sponsor Organizations
- Date: 3/13/2025
- Company Accounts: Community Investment Trust
- 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: Post	Description: Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	Amount: \$500
---	-----------------	--	---------------
- Total amount: \$500.00
- Save Changes button

A red arrow points to the '+ Add Line Item' button.

Fig. 139: Billing, Invoices, Add Line Item Button

The screenshot shows the 'Add Invoice' form with the following fields filled out:

- Company Type: Sponsor Organizations
- Date: 3/13/2025
- Company Accounts: Community Investment Trust
- 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 button

A red arrow points to the second line item, and a red box highlights the second line item row.

Fig. 140: Billing, Invoices, Second Line Item Added

Fig. 141: Billing, Invoices, Total Updated with New Line Item

2.12.2 Payments

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

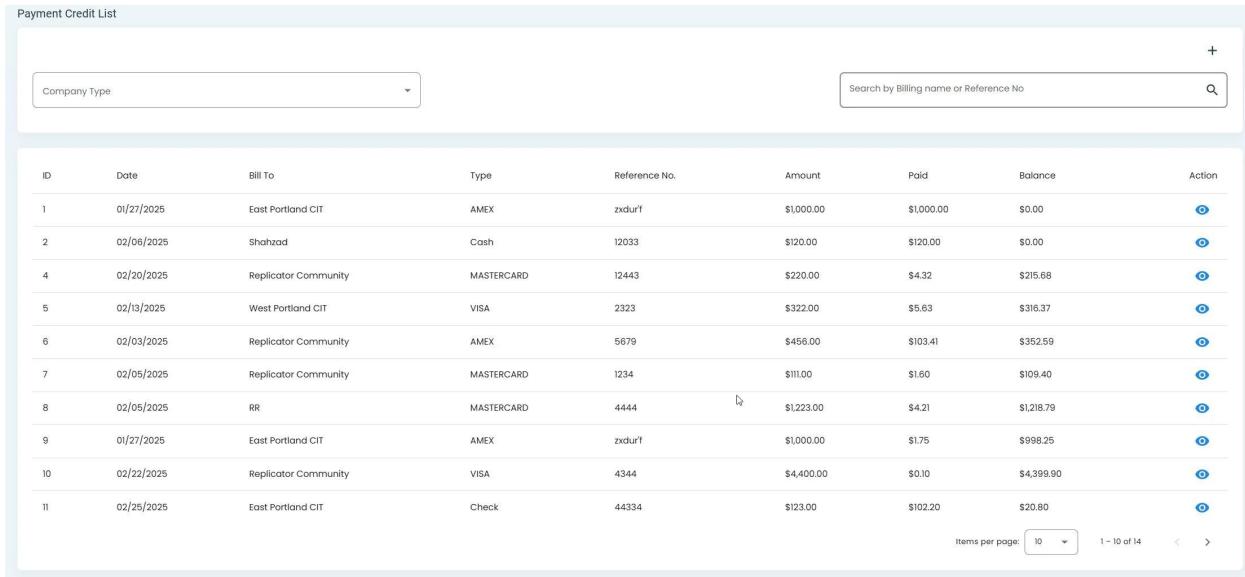
- *Features: Payments*
- *Layout: Payments Homepage*
- *Filtering Payments*
 - *Step 1: Locate the Filter Button*
 - *Step 2: Select Filter Criteria*
- *Searching Payments*
 - *Step 1: Locate the Search Bar*
 - *Step 2: Enter Search Terms*
- *Additional Features*

2.12.2.1 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

2.12.2.2 Layout: Payments Homepage

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



ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur1	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	l2033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	l2443	\$220.00	\$4.32	\$215.68	
5	02/19/2025	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	l234	\$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	zxdur1	\$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	

Fig. 142: Payments Homepage showing the payment records table

2.12.2.3 Filtering Payments

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

2.12.2.3.1 Step 1: Locate the Filter Button

Find the filter button in the Payments table interface.

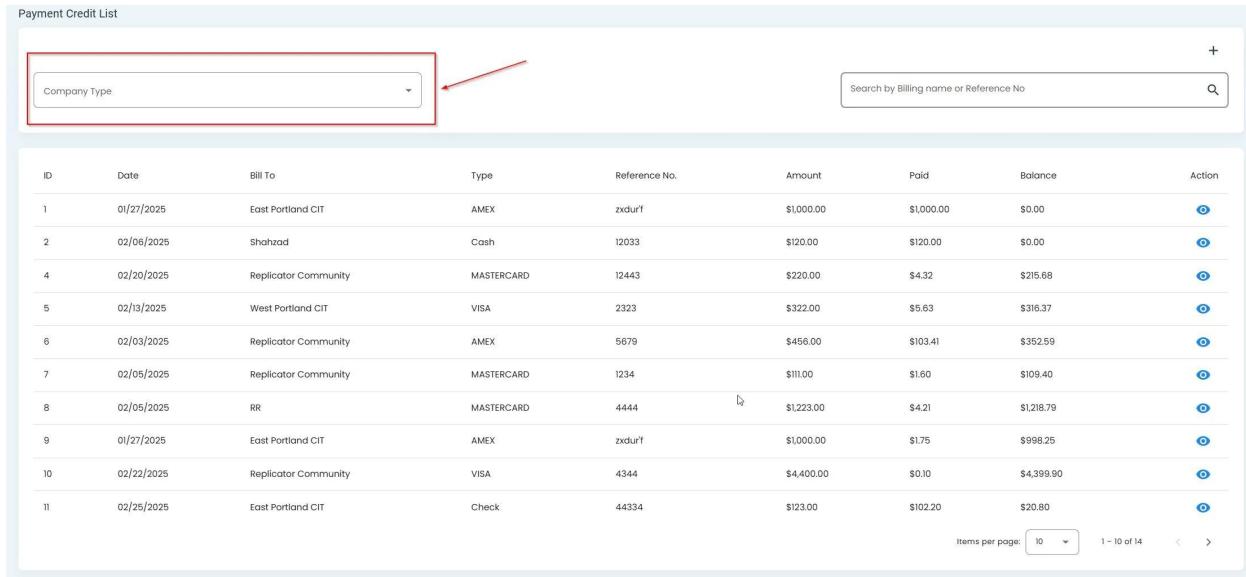
2.12.2.3.2 Step 2: Select Filter Criteria

Click the filter button to expand the available filtering options.

2.12.2.4 Searching Payments

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

Payment Credit List

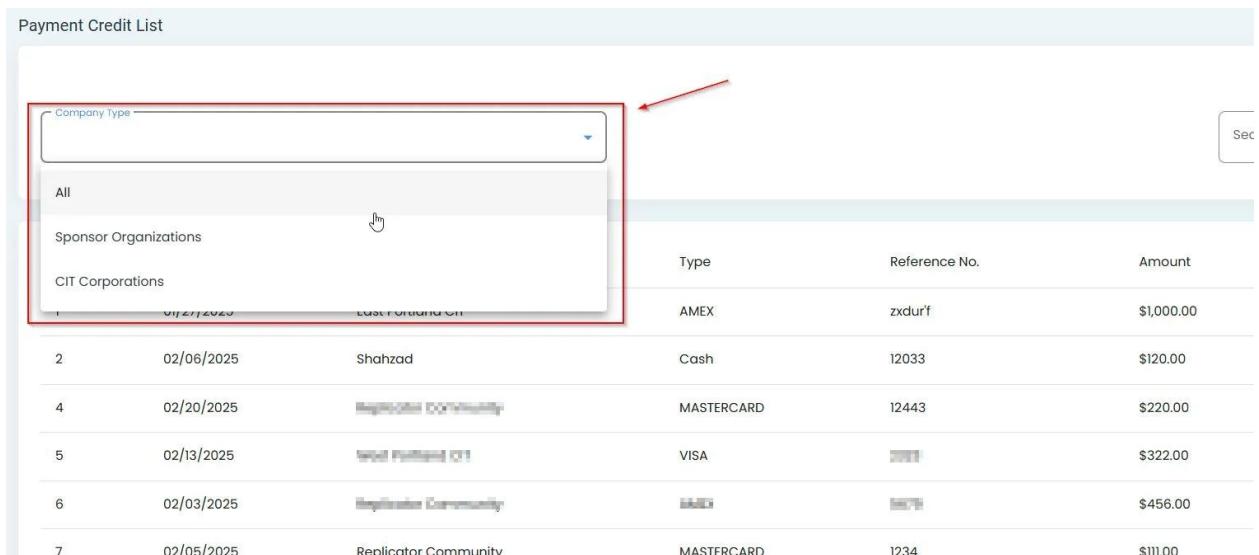


ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdurf	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	
5	02/13/2025	West Portland CIT	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: 1 – 10 of 14 < >

Fig. 143: Filter button location in the Payments table

Payment Credit List

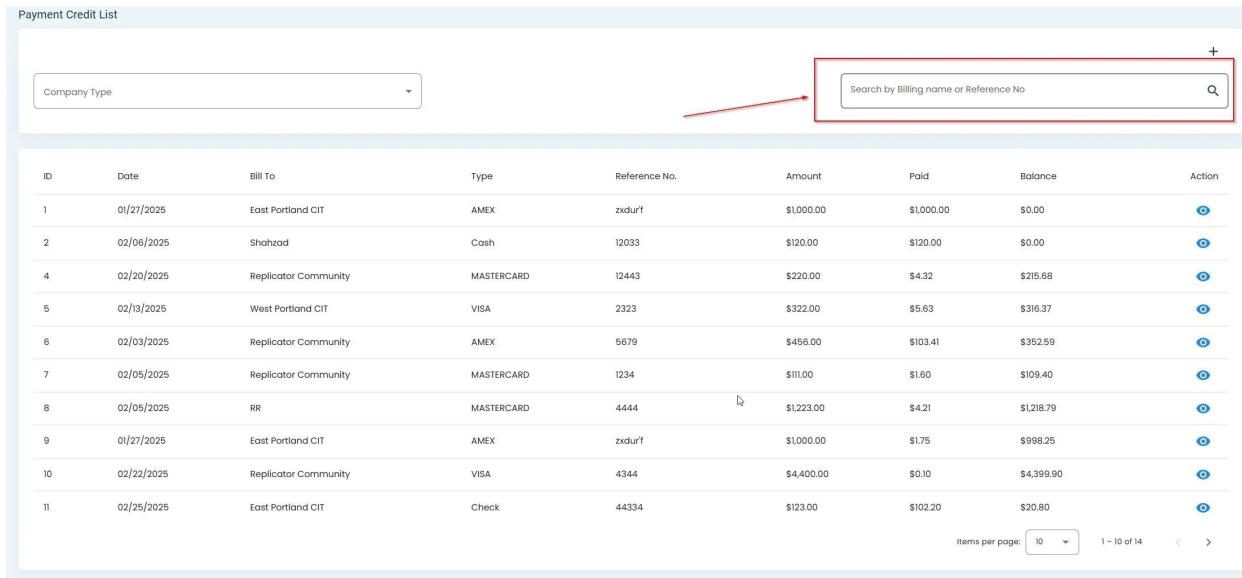


ID	Date	Bill To	Type	Reference No.	Amount
1	01/27/2025	East Portland CIT	AMEX	zxdurf	\$1,000.00
2	02/06/2025	Shahzad	Cash	12033	\$120.00
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00
7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

Fig. 144: Expanded filter options for the Payments table

2.12.2.4.1 Step 1: Locate the Search Bar

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



The screenshot shows a table titled 'Payment Credit List'. At the top left is a dropdown menu labeled 'Company Type'. To the right of the table is a search bar with the placeholder 'Search by Billing name or Reference No.' and a magnifying glass icon. A red arrow points from the text 'Search bar location in the Payments interface' to this search bar. The table has columns: ID, Date, Bill To, Type, Reference No., Amount, Paid, Balance, and Action. The data in the table is as follows:

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur1f	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	l2033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	l2443	\$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	l234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$123.00	\$4.21	\$128.79	
9	01/27/2025	East Portland CIT	AMEX	zxdur1f	\$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: 1 – 10 of 14 < >

Fig. 145: Search bar location in the Payments interface

2.12.2.4.2 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.

2.12.2.5 Additional Features

The Payments section includes additional features for managing payment information:

- View detailed payment information
- Add payment credits to accounts

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	zxdurif	\$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	zxdurif	\$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		

Fig. 146: Searchable columns in the Payments table

2.12.2.5.1 Viewing Payment Details

The Section: 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*
 - *Detailed Columns*
- *Summary*

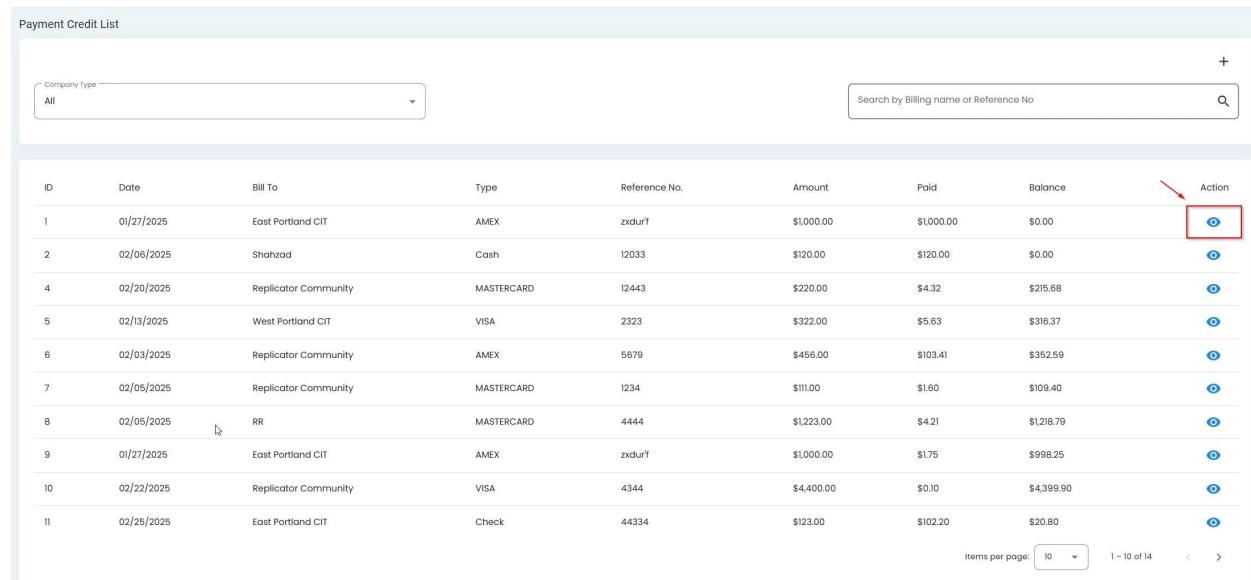
Overview: Payment Details

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.



The screenshot shows a table titled "Payment Credit List" with 14 rows of payment records. The columns are: ID, Date, Bill To, Type, Reference No., Amount, Paid, Balance, and Action. The "Action" column contains a blue circular button with a white "i" icon. A red box highlights the 11th row, and a red arrow points to the "Action" button in that row. The 8th row has a cursor icon over the "Bill To" column. The bottom right of the table shows pagination: "Items per page: 10" and "1 - 10 of 14".

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur1	\$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	zxdur1	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/28/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Fig. 147: 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.

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

Date*	1/27/2025	Payment type*	AMEX
Reference No.*	zxdur1	Amount*	\$1,000
Paid*	\$1,000	Balance*	\$0
Note*	Credited		

Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/> I002	Setup Fee	10/04/2024	\$1500.00	\$1.59	\$1,498.41
<input type="checkbox"/> I003	Setup Fee	01/29/2025	\$1500.00	\$1,038.87	\$396.13

Items per page: 10 1 - 2 of 2 < >

Fig. 148: Payment Details screen showing comprehensive payment information

Payment Credit Details

Date*	1/27/2025	Payment type*	AMEX
Reference No.*	zxdur1	Amount*	\$1,000
Paid*	\$1,000	Balance*	\$0
Note*	Credited		

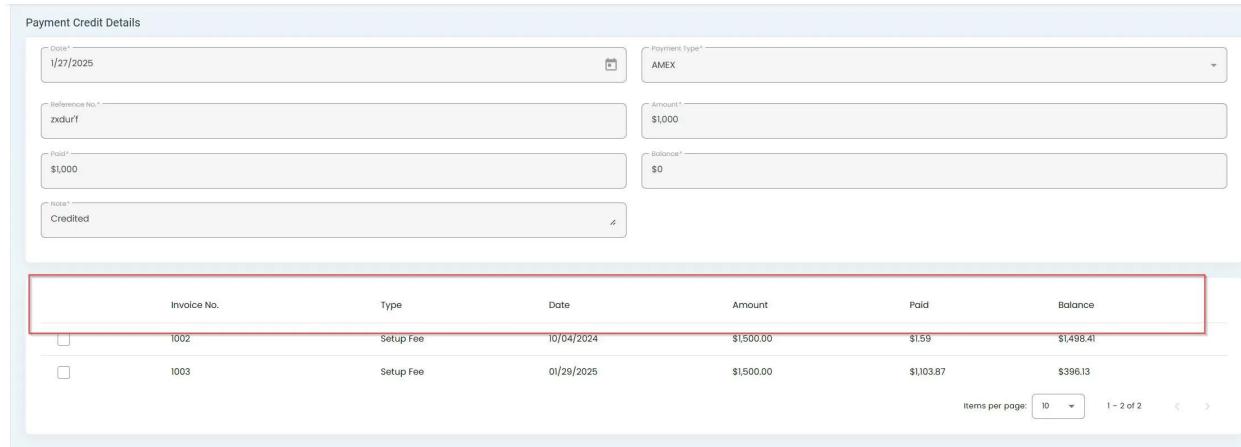
Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/> I002	Setup Fee	10/04/2024	\$1500.00	\$1.59	\$1,498.41
<input type="checkbox"/> I003	Setup Fee	01/29/2025	\$1500.00	\$1,038.87	\$396.13

Items per page: 10 1 - 2 of 2 < >

Fig. 149: Quick information section highlighted in the Payment Details screen

Detailed Columns

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



The screenshot shows the 'Payment Credit Details' screen. At the top, there are several input fields: 'Date' (1/27/2025), 'Payment type' (AMEX), 'Reference No.' (zxdur1), 'Amount' (\$1,000), 'Paid' (\$1,000), and 'Balance' (\$0). Below these are 'note' (Credited) and a note area. The main content area displays a table of transactions:

	Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13

At the bottom right, there are buttons for 'Items per page' (10), '1 - 2 of 2', and navigation arrows.

Fig. 150: 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

2.12.2.5.2 Adding Payment Credits

The Section: 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*

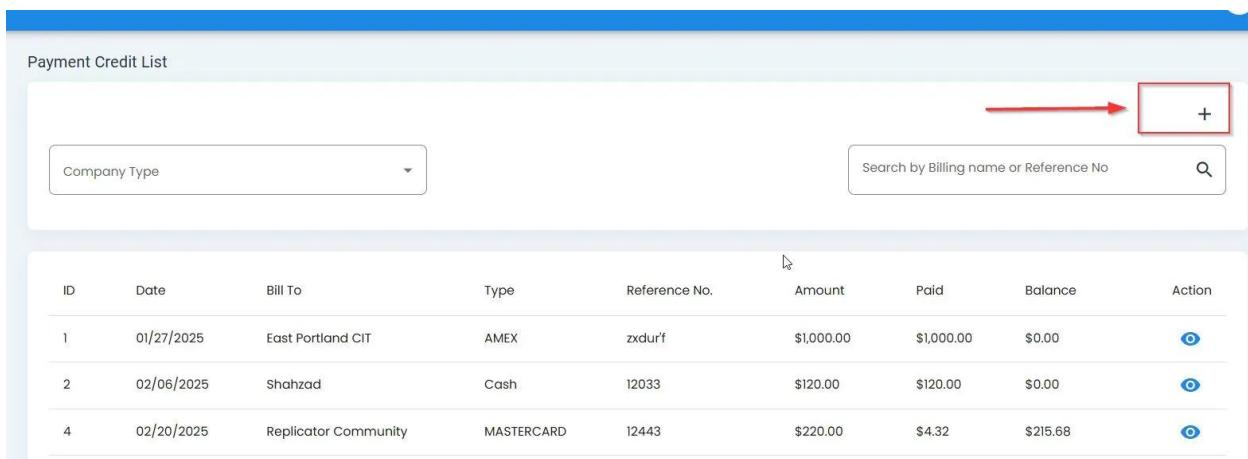
Overview: Payment Credits

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.



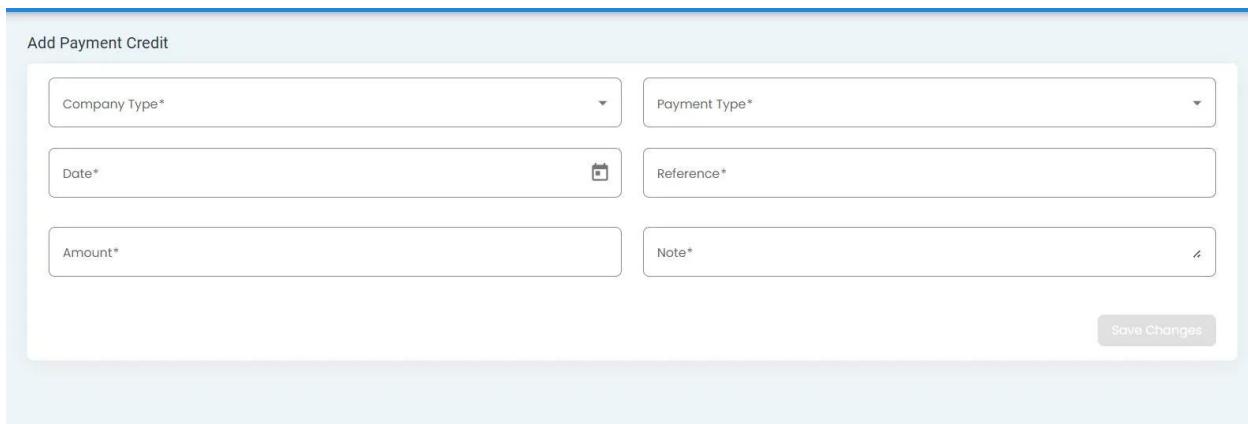
The screenshot shows a table titled "Payment Credit List" with columns: ID, Date, Bill To, Type, Reference No., Amount, Paid, Balance, and Action. There are three rows of data. At the top right of the table, there is a search bar labeled "Search by Billing name or Reference No." and a red box highlights the "Add" button (a plus sign inside a square) with a red arrow pointing to it.

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	

Fig. 151: 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.



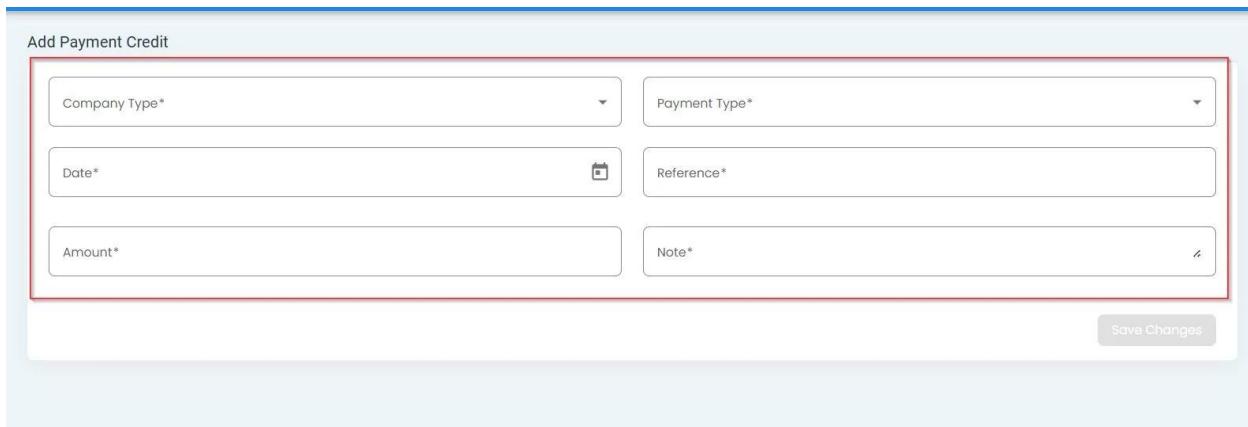
The screenshot shows the "Add Payment Credit" form with fields for Company Type, Payment Type, Date, Reference, Amount, and Note. A "Save Changes" button is at the bottom right.

Company Type*	Payment Type*
Date*	Reference*
Amount*	Note*

Fig. 152: The Add Payment Credit form

Note

All fields in the Add Payment Credit form are required.

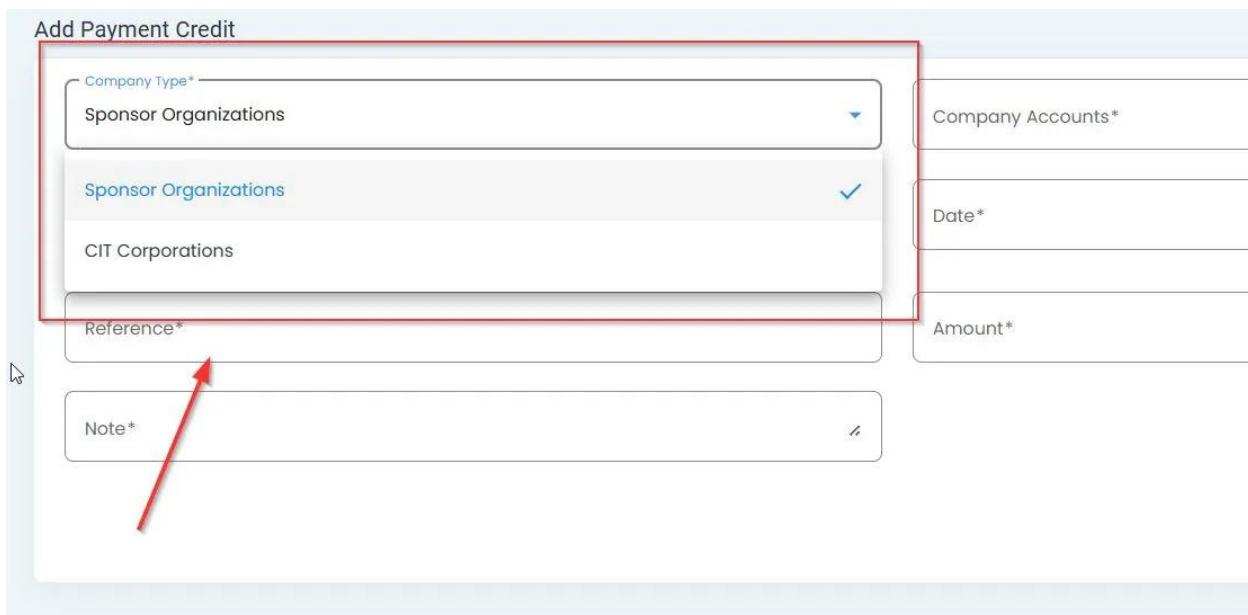


The screenshot shows the 'Add Payment Credit' form. It contains several input fields: 'Company Type*' (dropdown), 'Payment Type*' (dropdown), 'Date*' (date picker), 'Reference*', 'Amount*', 'Note*', and a 'Save Changes' button. A red box highlights the entire row of required fields (Company Type, Payment Type, Date, Reference, Amount, Note).

Fig. 153: All fields are required in the Add Payment Credit form

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 is open, showing 'Sponsor Organizations' and 'CIT Corporations'. 'Sponsor Organizations' is selected and highlighted with a blue checkmark. A red arrow points to the 'Company Type*' dropdown. Other fields visible include 'Company Accounts*', 'Date*', 'Amount*', 'Reference*', and 'Note*'. A red box highlights the 'Company Type*' dropdown.

Fig. 154: 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.

Payment Credit

Company Type* — Sponsor Organizations

Payment Type* —

Reference* —

Comments* —

Company Accounts* —

Community Investment Trust

Replicator Community

PT

RR

KK

NN

Save Changes

Fig. 155: Selecting the company account in the Add Payment Credit form

Step 5: Select Payment Type

Choose the appropriate payment type from the available options.

Add Payment Credit

Company Type* — Sponsor Organizations

Payment Type* —

Check

VISA

AMEX

MASTERCARD

DISCOVER

Cash

Company Accounts* — Community Investment Trust

Date* —

Amount* —

Save Changes

Fig. 156: 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.

Add Payment Credit

Company Type* — Sponsor Organizations

Company Accounts* — Community Investment Trust

Payment Type* — VISA

Date* — 3/19/2025

Reference* — AMEX Transaction #ZXL234

Amount* — \$1,000

Note* — Partial payment toward Setup Fee invoice #1002

Save Changes

Fig. 157: 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.

2.13 Settings

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

- Receive Notifications

2.14 Proxy

Welcome to the Section: Proxy section.