

CIT Common Functions Reference

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This quick reference guide covers the common functions and features used throughout the CIT Application.

Related Resources

For data definitions, status lookups, and quick reference cards, see the [Reference Guides](#) online or download the [Complete Reference Guide PDF](#).

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Common

This section contains shared functionality and patterns used throughout the CIT Application.

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- *Navigation*
- *User Management*
- *User Details*
- *Documents*
- *Forms*
- *Extras*

I **Navigation**

- *Navigating the CIT Application* Overview of application navigation
- *General Sidebar Navigation* Using the sidebar menu
- *Toggle Primary Sidebar* Show or hide the sidebar

I User Management

- [*Add New User*](#) Add users to organizations
- [*Delete User*](#) Remove users from organizations
- [*Edit Permissions*](#) Modify user access rights
- [*Users Tab*](#) Managing users in organization tabs

II User Details

- [*User Details Page*](#) View comprehensive user information
- [*Accounts Tab*](#) View user account associations

III Documents

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V Extras

- *Information Pane* Using the information pane

V.1 Navigating the CIT Application

The **Navigation** section covers how to navigate through the CIT application interface.

Table of Contents

- *Features: Navigation*

Features: Navigation

The **Navigation** section allows you to:

- *Navigate using the sidebar*
- *Toggle the primary sidebar visibility*

V.2 General Sidebar Navigation

In general, you can navigate through the site using the lefthand sidebar:

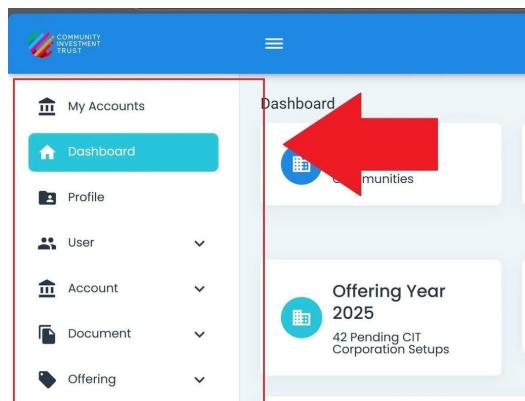


Fig. 1: Navigation, Sidenav Location

Sidebar Navigation Example: Staff Page

Example: Finding the **Staff Page**.

1. Select the **Users Section** from the **Primary Sidebar**.

Sidebar not Visible?

See [How to Toggle Primary Sidebar](#)

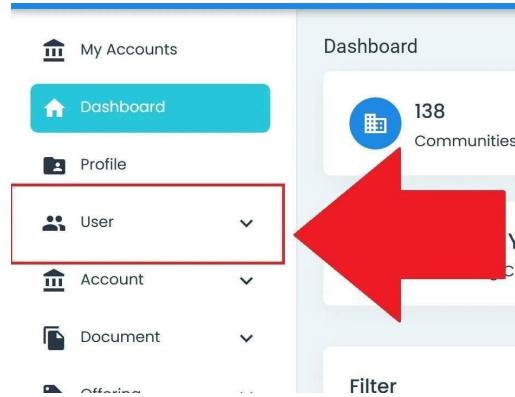


Fig. 2: Navigation, Staff Page Example, Find Users Section

2. Select **Staff Page**.

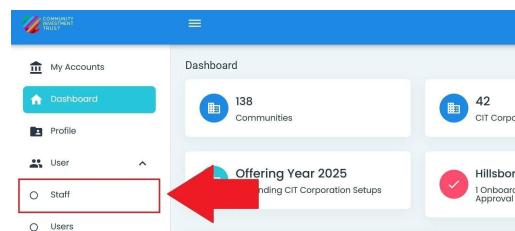


Fig. 3: Navigation, Staff Page

V.3 How to Toggle Primary Sidebar

The **Primary Sidebar** can be found along the leftside of the page (in both the **App** and **Documentation**):

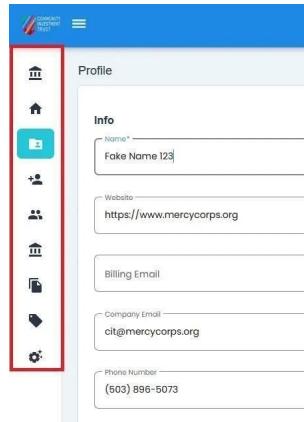


Fig. 4: Collapsed Primary Sidebar

To Toggle:

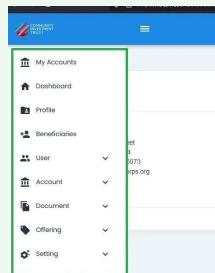
1. Find and **Select** the **Menu** button at the topleft of the page to toggle the **Primary Sidebar** :



Fig. 5: Primary Sidebar Toggle Location, Collapsed Sidebar

Action Complete: Toggle Primary Sidebar

The sidebar will open up; the names of the sections will appear:



Sidebar Expanded

V.4 Add New User

These instructions are generally applicable to any page that has an **Add New User** button.

To add a New User:

1. Click the **New User** button at the top right of the screen.

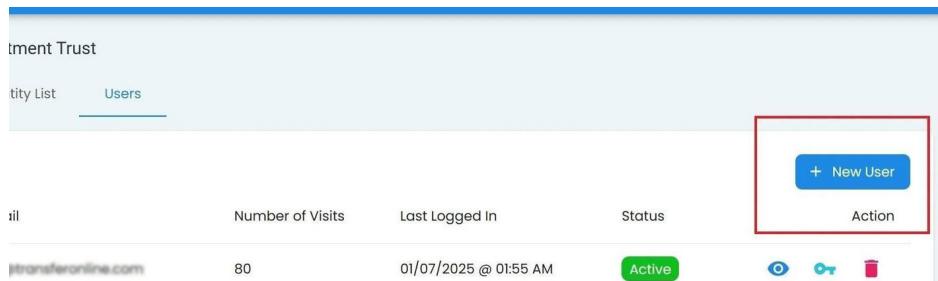


Fig. 6: Sponsorship Organization, Users Tab, New User Location

2. Fill out the required fields.

Note

All three fields are required:

- Email
- First Name
- Last Name

A screenshot of a modal dialog box titled 'Add New User'. The dialog contains three text input fields labeled 'Email*' (placeholder 'transferonline.com'), 'First Name*' (placeholder 'John'), and 'Last Name*' (placeholder 'Doe'). Below these fields is a section titled 'Permissions' with three expandable categories: 'Assessment Test', 'Billing', and 'Cashout'. Each category contains several checkboxes for selecting permissions. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Fig. 7: Sponsorship Organization, Users Tab, Add New User Popup

3. Select desired permissions for the new user.

Note

Possible permissions vary depending on the type of account you are adding.

4. Click **Save** to add the new user.

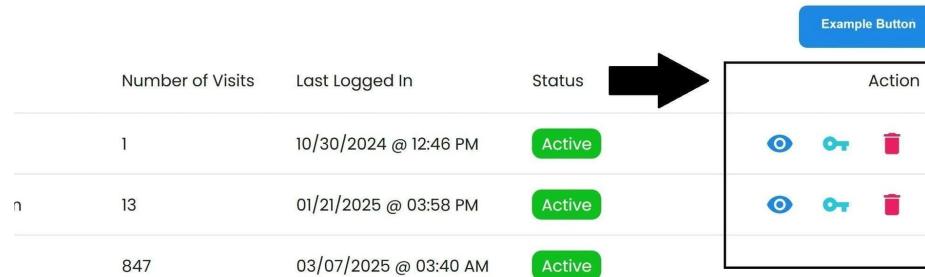
Action Complete

The new user has been added to the system.

V.5 How to Delete User, Staff, Company, etc.

To delete a user, staff, or company, follow these steps:

1. Find the **Action** column.



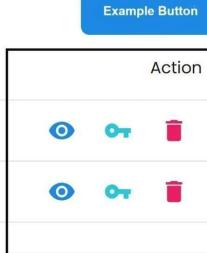
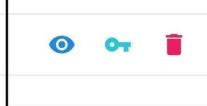
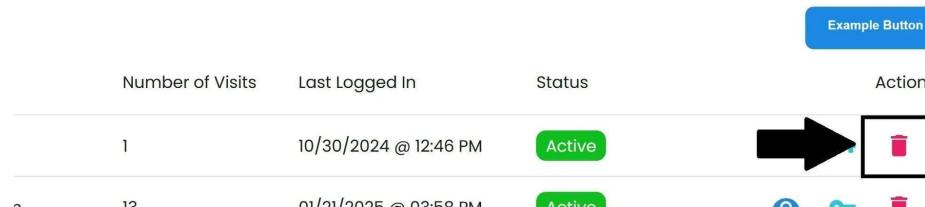
Number of Visits	Last Logged In	Status	Action
1	10/30/2024 @ 12:46 PM	Active	
13	01/21/2025 @ 03:58 PM	Active	
847	03/07/2025 @ 03:40 AM	Active	

Fig. 8: General Action Column Location

2. Find the row of the User you want to delete.

3. Click the **Delete** button.



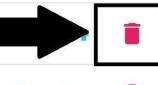
Number of Visits	Last Logged In	Status	Action
1	10/30/2024 @ 12:46 PM	Active	
13	01/21/2025 @ 03:58 PM	Active	

Fig. 9: General Delete Icon Location

4. Confirm the deletion.



Fig. 10: General Remove Popup Notification

V.6 Edit Permissions

You can edit permissions for various types of users throughout the app.

To Edit Permissions:

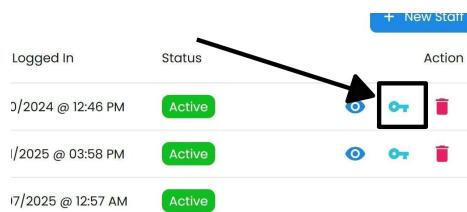
1. Click the **Edit Permissions** button next to the user/staff/company whose permissions you would like to edit.



Logged In	Status	Action
3/2024 @ 12:46 PM	Active	
1/2025 @ 03:58 PM	Active	
1/2025 @ 12:57 AM	Active	

Fig. 11: General “Edit Permissions” location

2. Select/Deselect to include the desired permissions.



Logged In	Status	Action
3/2024 @ 12:46 PM	Active	
1/2025 @ 03:58 PM	Active	
1/2025 @ 12:57 AM	Active	

Fig. 12: General “Edit Permissions” location

4. Click **Save Changes** at the bottom of the popup.

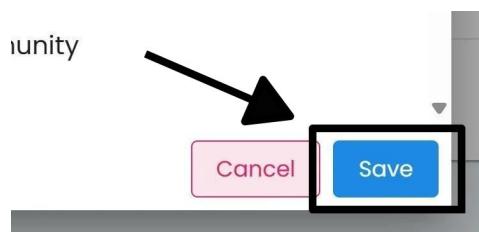


Fig. 13: General “Save Changes” location

V.7 Users Tab

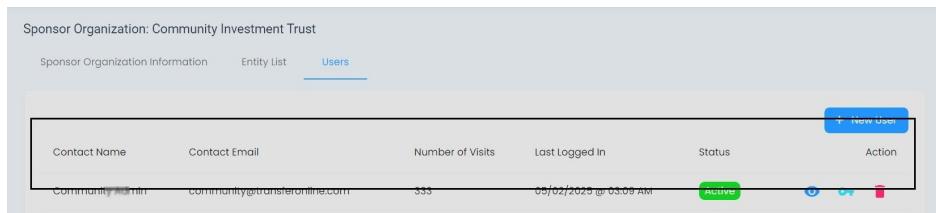
The **Users** tab provides a comprehensive list of all users associated with the **Sponsorship Organization**.



Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Community Admin	community@trustonline.com	333	05/02/2025 @ 03:09 AM	Active	  

Fig. 14: Sponsorship Organization, Users Tab

Users Tab Columns



Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Community Admin	community@trustonline.com	333	05/02/2025 @ 03:09 AM	Active	  

Fig. 15: Sponsorship Organization, Users Tab, Column Locations

Users Tab Actions

The **Actions** column for the **Users** tab provides the following operations:

- [View User Details](#) Access comprehensive user information
- [Edit Permissions](#) Modify user access rights
- [Remove User Access](#) Revoke user's access to the entity

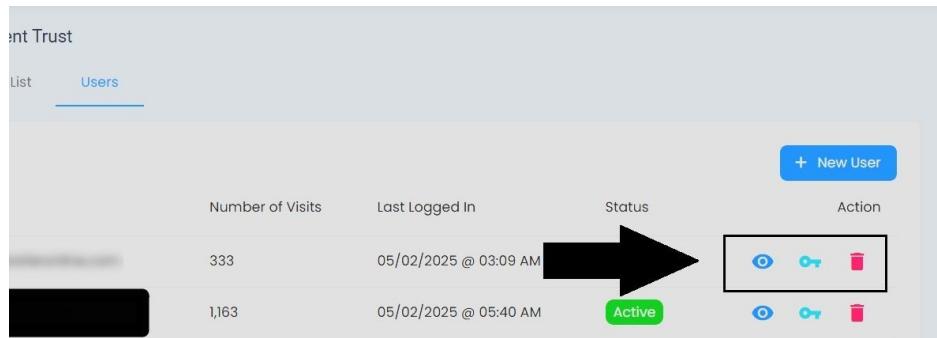


Fig. 16: Sponsorship Organization, Users Tab, Actions Column

View User Details

Click the **View More** button to open the user's details page.

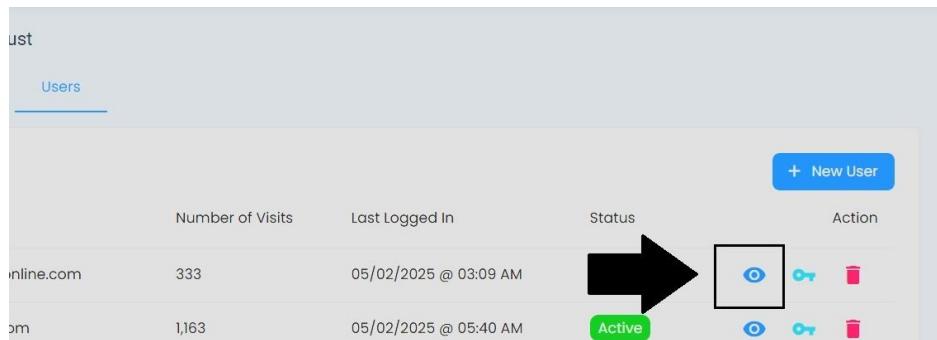


Fig. 17: Sponsorship Organization, Users Tab, View User Details Location

See Remaining User Detail Sections

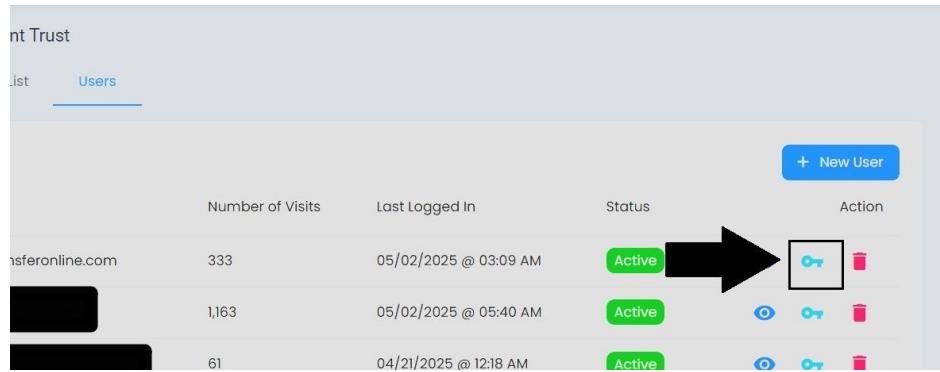
For full details about the User Information and Accounts tabs, see [Managing User Accounts](#).

Edit Permissions

Click the **Edit Permissions** button to modify the selected user's access.

How to Edit Permissions

See the generic [Edit Permissions guide](#) for stepbystep instructions.



A screenshot of a web-based application interface titled 'Sponsorship Organization' with a sub-section 'Users'. The 'Users' tab is selected. The table displays user information including Entity Email, Number of Visits, Last Logged In, Status, and Action. The 'Action' column contains three icons: a key, a lock, and a trash can. A large black arrow points to the trash can icon in the 'Action' column of the first row. The table has a header row with columns: Entity Email, Number of Visits, Last Logged In, Status, and Action.

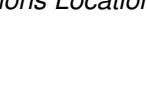
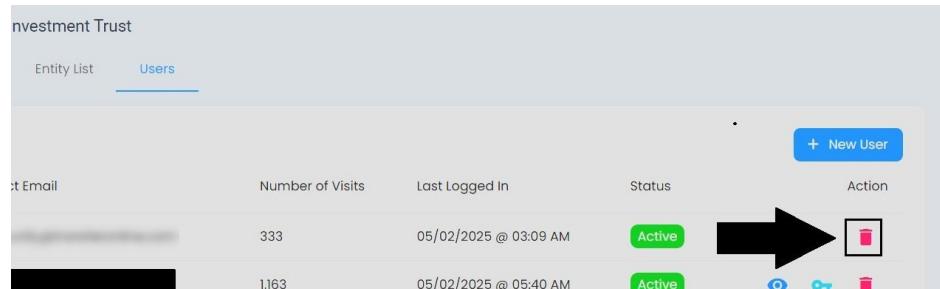
Entity Email	Number of Visits	Last Logged In	Status	Action
transferonline.com	333	05/02/2025 @ 03:09 AM	Active	  
[REDACTED]	1,163	05/02/2025 @ 05:40 AM	Active	  
[REDACTED]	61	04/21/2025 @ 12:18 AM	Active	  

Fig. 18: Sponsorship Organization, Users Tab, Edit Permissions Location

Remove User Access

Click the **Delete** button to remove the user's access to the Sponsorship Organization.



A screenshot of the same web-based application interface as Figure 18. The 'Users' tab is selected. The table displays user information. A large black arrow points to the trash can icon in the 'Action' column of the first row. The table has a header row with columns: Entity Email, Number of Visits, Last Logged In, Status, and Action.

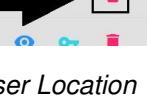
Entity Email	Number of Visits	Last Logged In	Status	Action
transferonline.com	333	05/02/2025 @ 03:09 AM	Active	  
[REDACTED]	1,163	05/02/2025 @ 05:40 AM	Active	  

Fig. 19: Sponsorship Organization, Users Tab, Remove User Location

Removing a User

Follow the generic [Delete User](#) instructions to confirm and complete removal.

V.8 User Details Page

The **User Details** page opens up to the **User Information** tab.

User Information Tab

The screenshot shows the 'User Detail: John Service' page. The 'User Information' tab is selected. The profile section shows a placeholder image of a person with glasses. The activity section shows a log of recent activities, including profile updates and time zone changes. The sidebar on the right shows 'Created & Modified' details, indicating the user was created on October 8, 2024, and modified on December 31, 2024.

Fig. 20: View User Details Homepage, User Information Tab

The **User Details** page has various actions available:

- Save Changes
- Deactivate User
- Resend Activation

You can find the actions at the bottom right of the page:

The screenshot shows the bottom right corner of the User Details page. A red arrow points to the 'Save Changes' button, which is highlighted with a red box. The other buttons in the row are 'Deactivate' and 'Reset Password'.

Fig. 21: User Actions Location, Bottom Right

Edit User Details

The **User Information Tab** allows you to edit the following fields:

- First Name
- Last Name
- Username (Email)
- Phone Number

To Edit a User'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 bottomright of the page.



AM

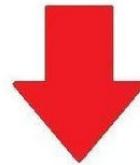


Fig. 22: User, User Homepage, Save Changes

Looking for the Accounts Tab?

See [Accounts Tab](#)

User Details: Accounts Tab

The **User Details** page also has an **Accounts** tab that allows you to view the accounts associated with the user.

Account Name	Type	Email	Phone	Action
Community 8	Sponsor Organization		(546) 464-6464	

Fig. 23: User, User Details Homepage, **Accounts** Tab

Accounts Tab: Table Columns

The **Accounts Tab** displays the following **Columns** :

- **Account Name**
- **Type**
- **Email**
- **Phone**
- **Action** (**View Account** , **Edit Permissions** , **Delete**)

Account Name	Type	Email	Phone	Action
Community 8	Sponsor Organization		(546) 464-6464	

Fig. 24: User, User Details Homepage, **Accounts Tab** , Column Names

Accounts Tab Available Actions

The **Action** has three **Actions** available:

- **View Account** Takes you to the *Sponsorship Organization Page*
- **Edit Permissions** Allows you to *modify the user's access rights*
- **Delete** Allows you to *remove the user's access*

Action Column for Accounts Tab

The **Action** has three **Actions** available:

- **View Account** Takes you to the *Sponsorship Organization Page*

- **Edit Permissions** Allows you to *modify the user's access rights*
- **Delete** Allows you to *remove the user's access*

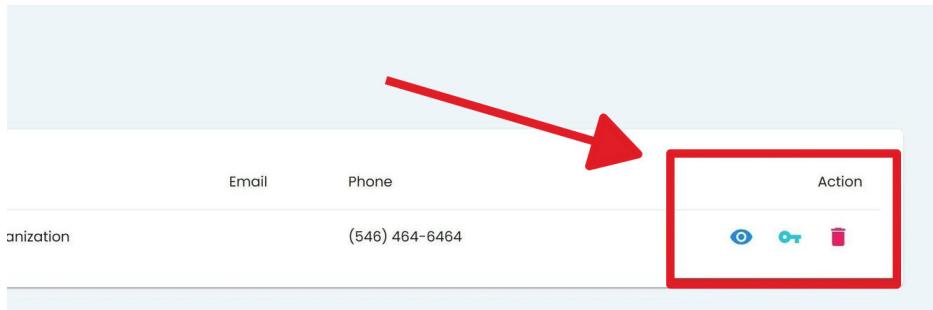


Fig. 25: User, User Details Homepage, **Accounts** Tab, **Action** Column

View Sponsorship Account

- Select the View Account button for the account you want to view.

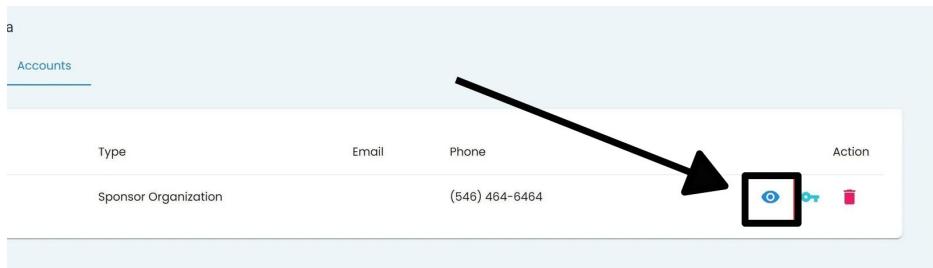


Fig. 26: User, User Details Homepage, Accounts Tab, View Account Icon

Note

- Selecting the *View Account* button will take you to the Sponsorship Organization Page.

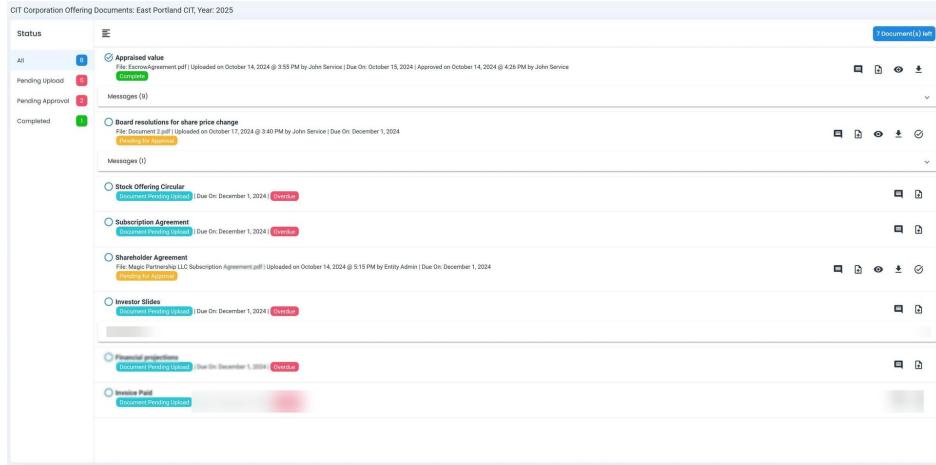
See also

- See *Information Pane* to learn more about the details in the Information Pane.

V.9 View More Details: Documents

The **View More Details** pages for the **Onboarding Documents** and **Offering Documents** sections provide similar functionality. The instructions provided here apply to both sections.

The *View More Details* action for either page will you to the following page:



The screenshot shows a list of documents in a table format. The columns include Status, Document Name, File Name, Upload Date, Due Date, and Actions. The documents listed are:

Status	Document Name	File Name	Upload Date	Due Date	Actions
Approved	Appraised value	File: ExecutiveAgreement.pdf	Uploaded on October 14, 2024 @ 3:55 PM	Due On: October 15, 2024	Approved on October 14, 2024 @ 4:28 PM by John Service
Pending Upload	Corporate				
Pending Approval	Messages (9)				
Completed	Board resolutions for share price change	File: Document 2.pdf	Uploaded on October 17, 2024 @ 9:40 PM	Due On: December 1, 2024	
	Stock Offering Circular	Document Pending Update		Due On: December 1, 2024	Update
	Subscription Agreement	Document Pending Update		Due On: December 1, 2024	Update
	Shareholder Agreement	File: Major Partnership LLC Subscription Agreement.pdf	Uploaded on October 14, 2024 @ 5:15 PM	Due On: December 1, 2024	
	Investor Slides	Document Pending Update		Due On: December 1, 2024	Update
	Financial projections	Document Pending Update		Due On: December 1, 2024	Update
	Invoice Paid	Document Pending Update			

Looking for an Overview?

See [citcorporationonboardingpage](#) or [citcorporationofferingsection](#)

Layout Explanation

View Details: Tabs Explained

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

- All** All documents, regardless of status.
- Upload Pending** Documents awaiting upload.
- Pending Approval** Documents awaiting approval.
- Completed** Documents fully approved and completed.

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

- All** All documents, regardless of status.
- Upload Pending** Documents awaiting upload.
- Pending Approval** Documents awaiting approval.
- Completed** Documents fully approved and completed.

View Details: Cards Explained

Each card displays information about a document:

- File Name** The name of the uploaded document file.
- File Type** The format or type of the document (PDF, DOC, etc.).
- Date** The date the document was uploaded.
- Time Uploaded** The time the document was uploaded.
- Uploaded By** The user who uploaded the document.
- Status** The current status of the document (Upload Pending, Pending Approval, Completed).

Each card displays information about a document:

- File Name** The name of the uploaded document file.
- File Type** The format or type of the document (PDF, DOC, etc.).
- Date** The date the document was uploaded.
- Time Uploaded** The time the document was uploaded.
- Uploaded By** The user who uploaded the document.
- Status** The current status of the document (Upload Pending, Pending Approval, Completed).

- **Approved By** The user who approved the document (if applicable).
- **Messages** Any messages or notes associated with the document.

Available Actions

The **Onboarding Document Details** section provides several actions for each document type.

Document Actions

- **Add Message** Allows you to add a message to the document.
- **Upload New File** Allows you to upload a new file to the document.
- **View Document** Allows you to view the uploaded document.
- **Download Document** Allows you to locally download the document.
- **Approve Uploaded Document** Allows the user to approve any documents that have been uploaded.

Actions by Tab

See below for actions available in each tab.

Upload Pending Status: Available Actions

The **Upload Pending** cards contain only two actions:

- **Add Message** Allows you to add a message to the document.
- **Upload New File** Allows you to upload a new file to the document.

Pending Approval Tab: Available Actions

The **Pending Approval** cards contain all possible actions as can be seen:

Completed Tab: Available Actions

The **Completed** cards contain every action besides the **Approve Uploaded Document** action.

Available Actions

The following actions are available for completed documents:

- Comment Add or view comments on the document
- Upload Upload a new version or related file
- View View the document details and metadata
- Download Download the document to your device

Note

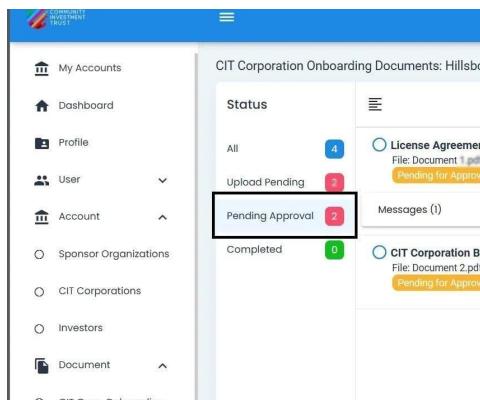
The **Approve Uploaded Document** action is only available on the **Pending Approval** tab, not on completed documents.

How to Approve Uploaded Document(s)

Follow the instructions below to approve an uploaded document.

To Approve an Uploaded Document:

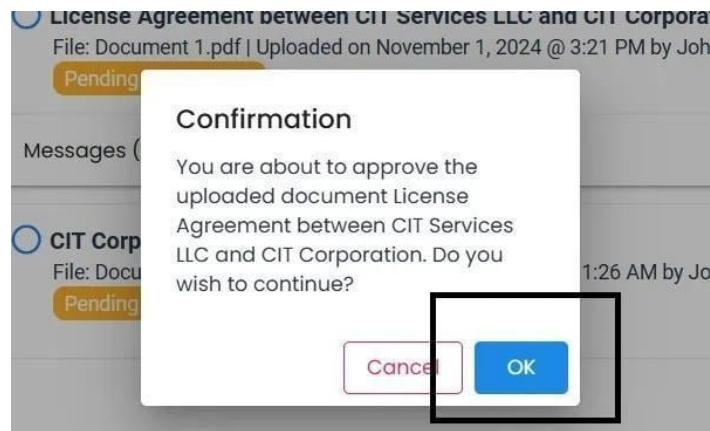
1. Go to the “Pending Approval” tab.



2. Select the **Approve Uploaded Document** action.



3. Read **Confirmation** popup, and select “OK” to approve the document.



Action Completed

The card for the document that was pending should immediately be moved to the “Completed” tab, like so:



Available Actions

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

- *All Status*
- *Upload Pending Status*
- *Pending Approval Status*

V.10 How to Edit Form Fields

To Edit a Form’s Fields:

1. **Find** the field you want to edit.
2. **Click** the **Edit** button next to the form field.
3. Make the desired changes to the form field.
4. **Click** **Save Changes** at the bottom of the popup.

Note

Some forms do not explicitly have a “save changes” button. In those cases, the changes will be saved automatically.

V.11 Information Pane

The **Information Pane** (Right Column) provides both an **Activity Log** and a **Created & Modified** Section.

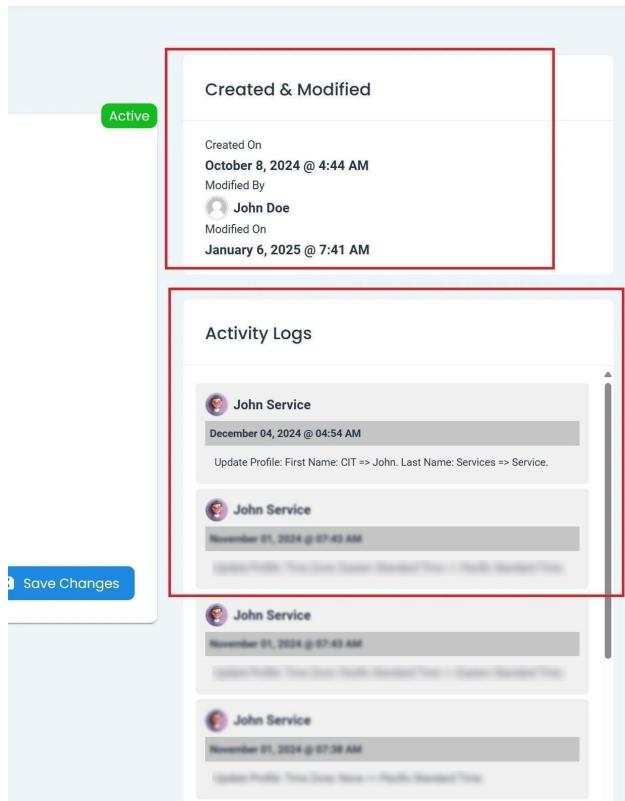


Fig. 27: Information Pane

Created & Modified Section

The **Created & Modified** section contains the following:

- The date and time the company's profile was created.
- Who edited the profile.
- The most recent date and time the company's profile was edited.

Created & Modified

Created On
October 4, 2024 @ 2:51 AM

Modified By
 **John Doe**

Modified On
January 2, 2025 @ 5:55 PM

Activity Log Section

The **Activity Logs** section contains a list of changes made to the company's profile.

Each **Activity Log entry** contains the following:

- Who made the change.
- What was changed.
- The date and time the change was made.

Activity Logs

Activity Logs	
 John Doe	January 02, 2025 @ 09:55 AM
Update Profile: Logo: Upload New Logo.	

Activity Logs	
 John Doe	January 02, 2025 @ 09:54 AM
Update Profile: CIT Service Name: CIT Services => John Doe Enterprises. Website: https://www.mercycorps.org => www.johndoeenterprises.com . Billing Email: none => billing@johndoeenterprises.com. Company Email: cit@mercycorps.org => info@johndoeenterprises.com. Phone Number: (503) 896-5073 => (555) 123-4567. Logo: Upload New Logo. Primary Address 1: 45 SW Ankeny Street => 123 Main Street. Primary Address 2: none => Suite 456. Mailing Address 1: none => 456 Elm Street. Mailing Address 2: none => Apt 789. Mailing City: none => Scottsdale. Mailing Zip Code: 122/22 => 85251.	