

## 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](#).

I

# Common

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

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## 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

- [View Document Details](#) View detailed document information

## IV Forms

- [Form Fields](#) Working with form fields

## 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:

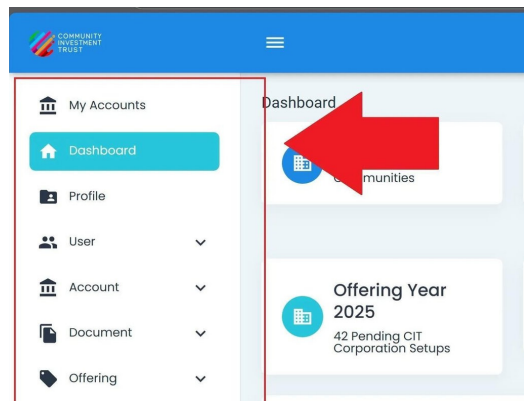


Fig. 1: Navigation, Sidenav Location

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](#)

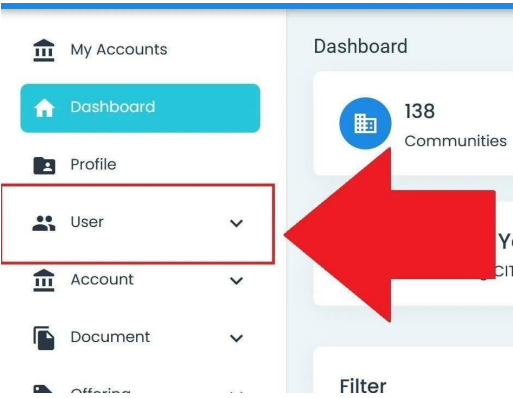


Fig. 2: Navigation, Staff Page Example, Find Users Section

- 2. Select **Staff Page** .

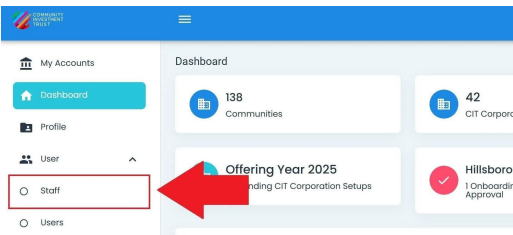


Fig. 3: Navigation, Staff Page



### 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**):

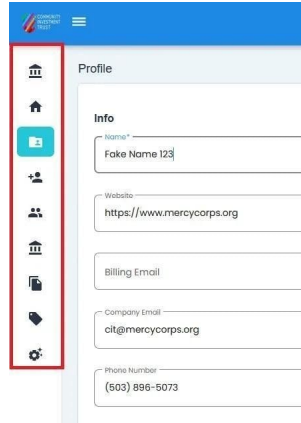


Fig. 4: Collapsed Primary Sidebar

To Toggle:

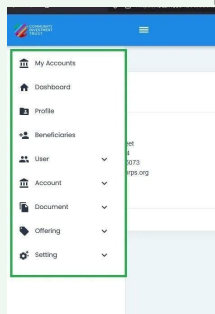
1. Find and **Select** the **Menu** button at the topleft of the page to toggle the **Primary Sidebar** :



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.

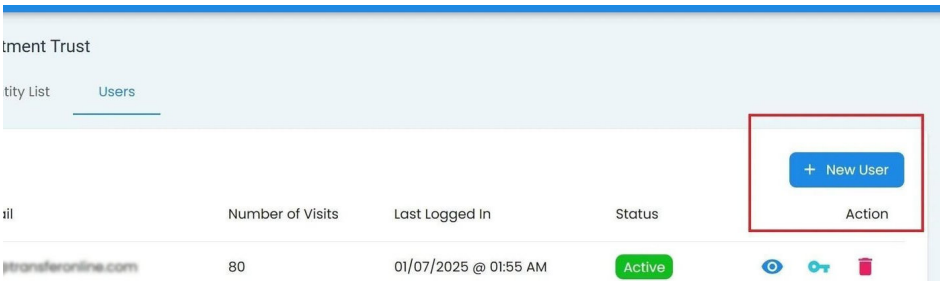


Fig. 6: Sponsorship Organization, Users Tab, New User Location

2. Fill out the required fields.

**Note**

All three fields are required:

- Email
- First Name
- Last Name

A screenshot of a 'Add New User' modal form. It contains three input fields: 'Email\*', 'First Name\*', and 'Last Name\*'. Below these is a 'Permissions' section with three expandable categories: 'Assessment Test', 'Billing', and 'Cashout'. Each category has a checkbox to toggle it, and then sub-items with checkboxes. For 'Assessment Test', there is 'View Assessment Test Results'. For 'Billing', there are 'View Invoice' and 'View Payment'. For 'Cashout', there are 'Add/Edit Cashout Questions' and 'Approve/Deny Cashout Request'. At the bottom right of the form 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.

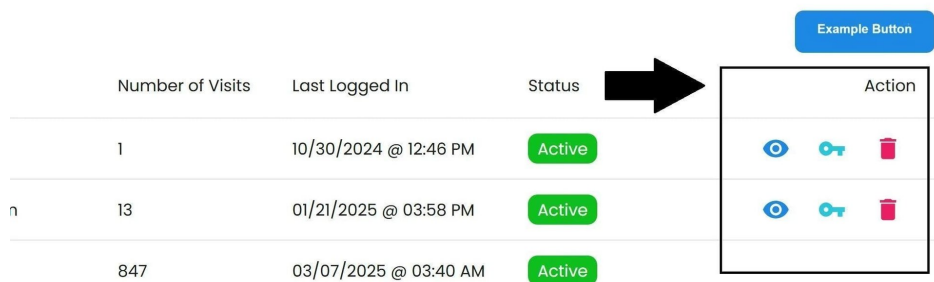
Action Complete

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.












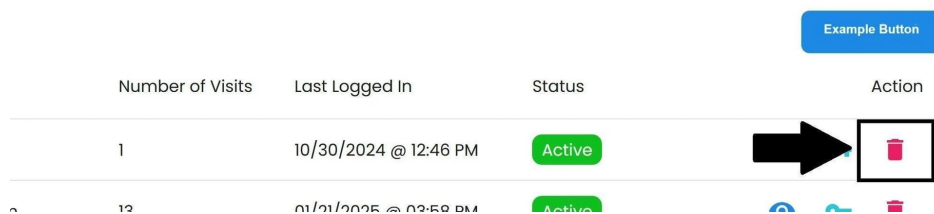
Number of Visits	Last Logged In	Status	Action
1	10/30/2024 @ 12:46 PM	Active	  
13	01/21/2025 @ 03:58 PM	Active	  
847	03/07/2025 @ 03:40 AM	Active	  

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.

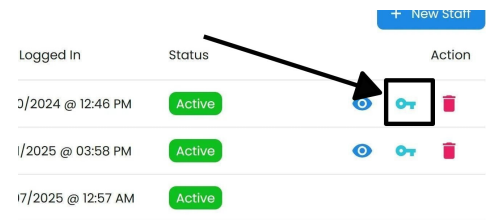


Fig. 11: General “Edit Permissions” location

- 2. Select/Deselect to include the desired permissions.

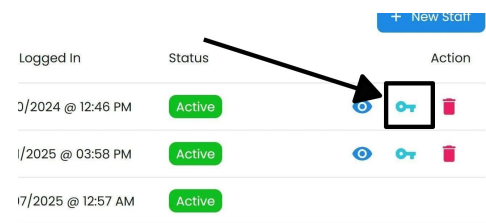


Fig. 12: General “Edit Permissions” location

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

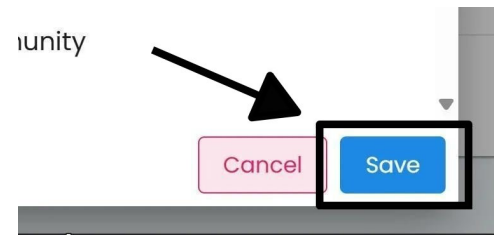


Fig. 13: General “Save Changes” location

V.7 Users Tab

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

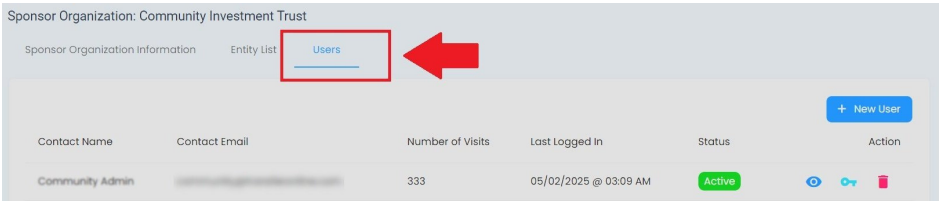


Fig. 14: Sponsorship Organization, Users Tab

Users Tab Columns



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

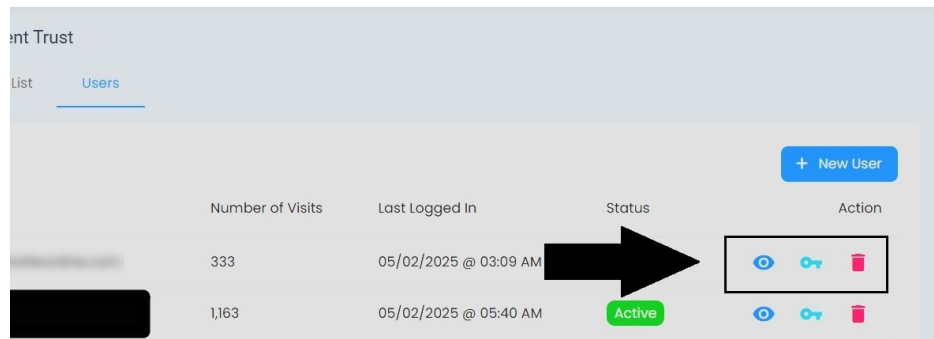


Fig. 16: Sponsorship Organization, Users Tab, Actions Column

## View User Details

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

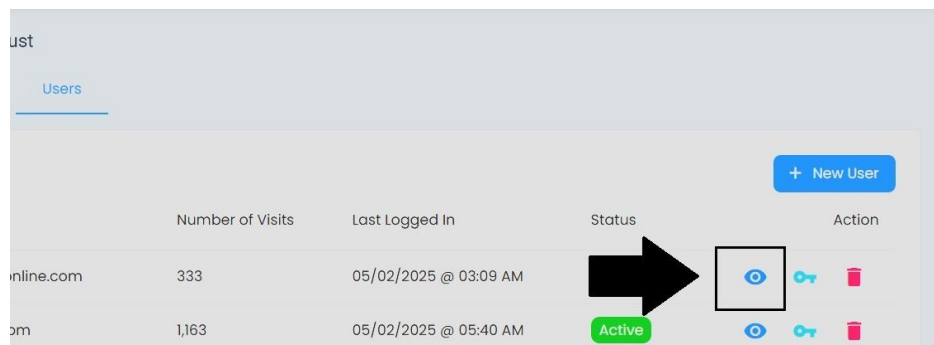


Fig. 17: Sponsorship Organization, Users Tab, View User Details Location

## 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.

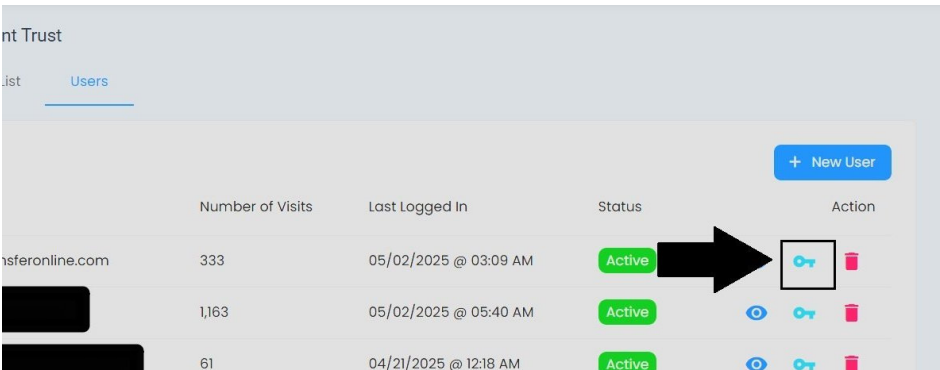


Fig. 18: Sponsorship Organization, Users Tab, Edit Permissions Location

Remove User Access

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

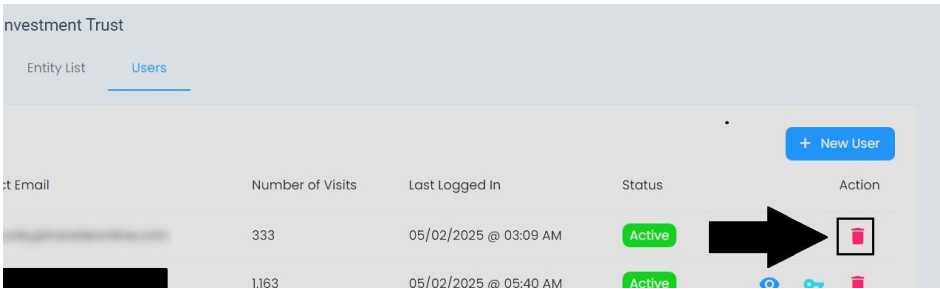


Fig. 19: Sponsorship Organization, Users Tab, Remove User Location

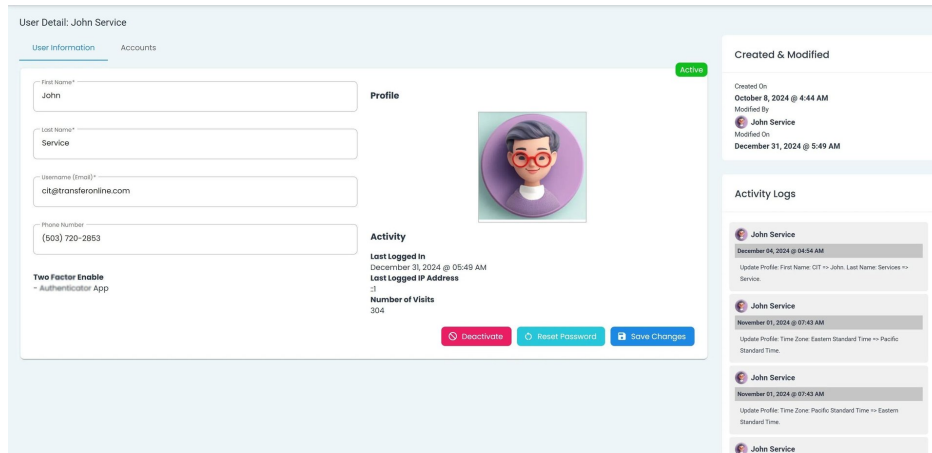
Removing a User

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



User Detail: John Service

Active

Created & Modified

Created On: October 8, 2024 @ 4:44 AM  
Modified By: John Service  
Modified On: December 31, 2024 @ 5:49 AM

Activity Logs

John Service  
December 04, 2024 @ 04:54 AM  
Update Profile: First Name: CIT -- John Last Name: Service --> Service

John Service  
November 01, 2024 @ 07:43 AM  
Update Profile: Time Zone: Eastern Standard Time --> Pacific Standard Time

John Service  
November 01, 2024 @ 07:43 AM  
Update Profile: Time Zone: Pacific Standard Time --> Eastern Standard Time

John Service

First Name: John  
Last Name: Service  
Username (Email): cit@transforonline.com  
Phone Number: (503) 720-2853

Two Factor Enable  
~ Authenticator App

Profile

Activity

Last Logged In: December 31, 2024 @ 05:49 AM  
Last Logged IP Address: [redacted]  
Number of Visits: 304

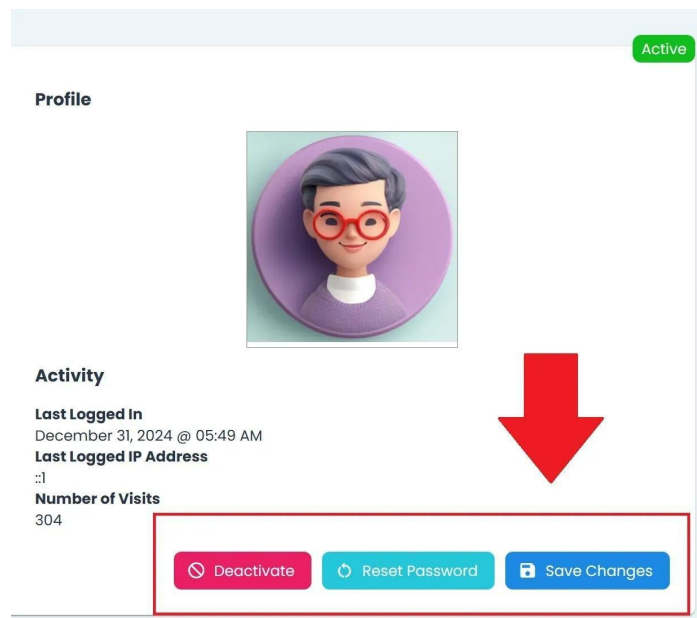
Deactivate Reset Password Save Changes

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 bottomright of the page:



Active

Profile

Activity

Last Logged In: December 31, 2024 @ 05:49 AM  
Last Logged IP Address: [redacted]  
Number of Visits: 304

Deactivate Reset Password Save Changes

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.

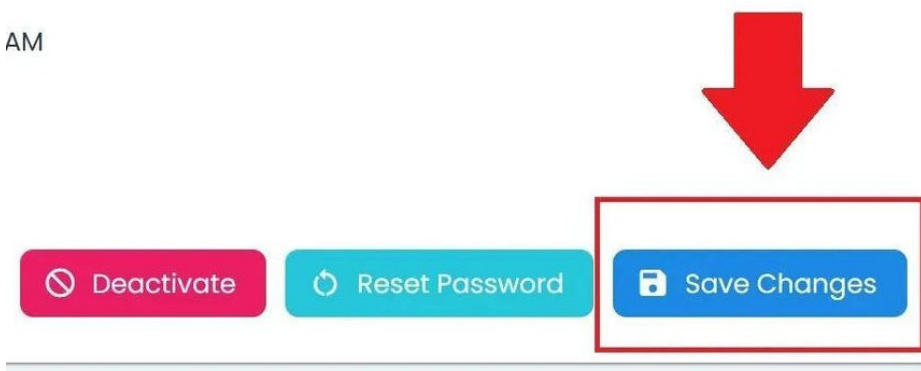
#### Note

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.

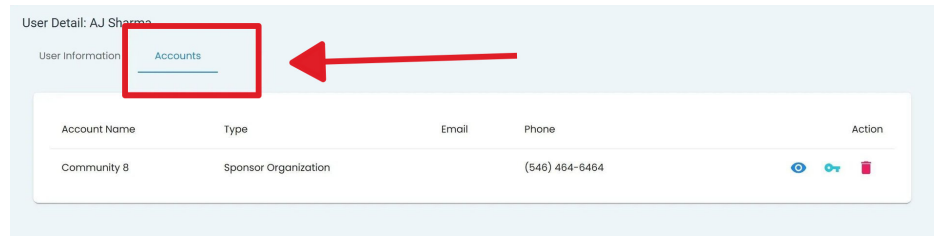


Fig. 23: User, User Details Homepage, **Accounts** Tab

## Accounts Tab: Table Columns

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

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

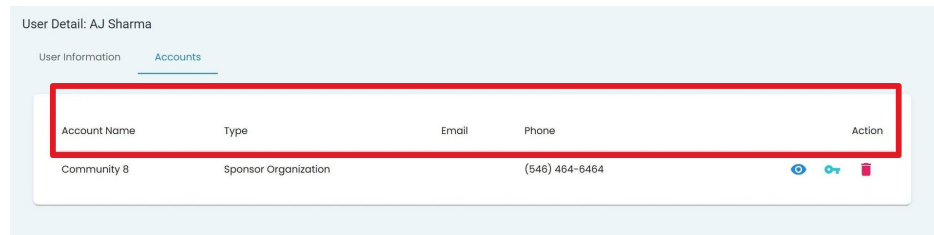


Fig. 24: User, User Details Homepage, **Accounts Tab** , Column Names

## 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*

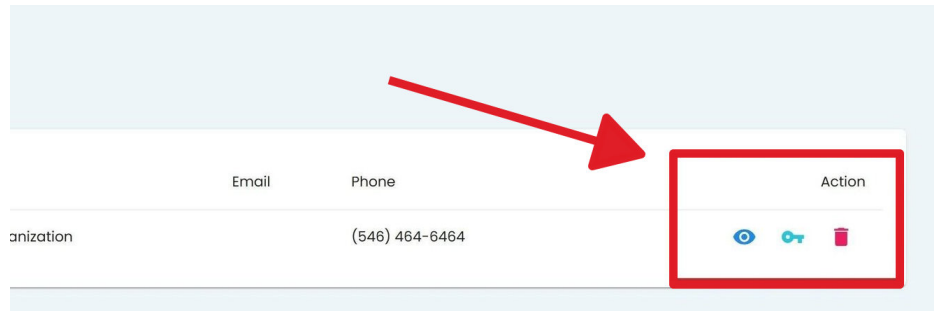


Fig. 25: User, User Details Homepage, **Accounts** Tab, **Action** Column

### View Sponsorship Account

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

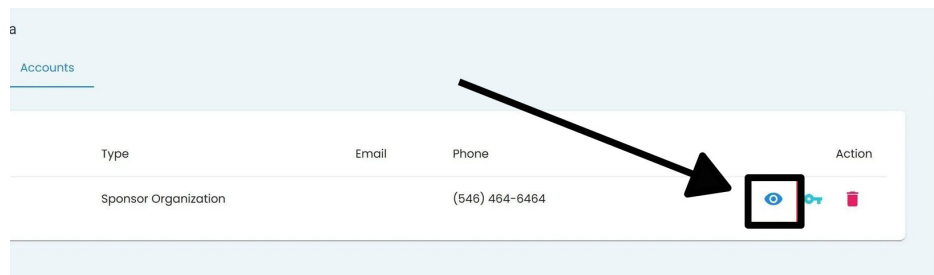


Fig. 26: User, User Details Homepage, Accounts Tab, View Account Icon

#### Note

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

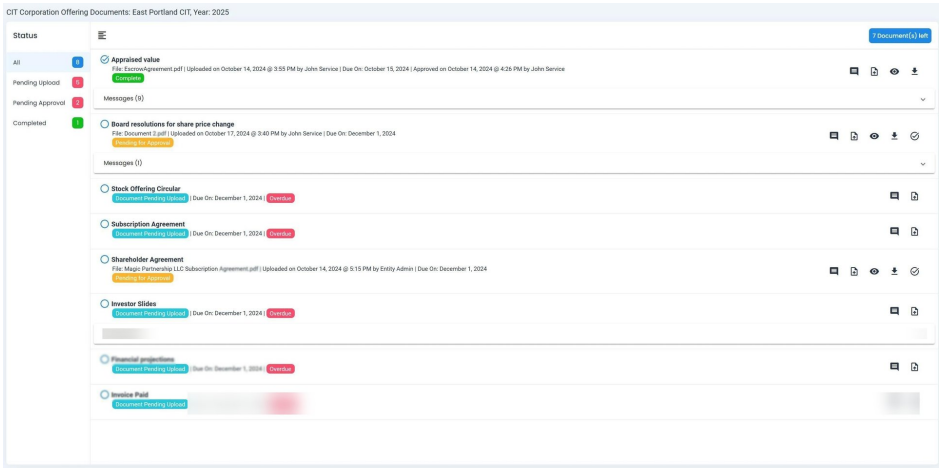
#### Seealso

- 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:

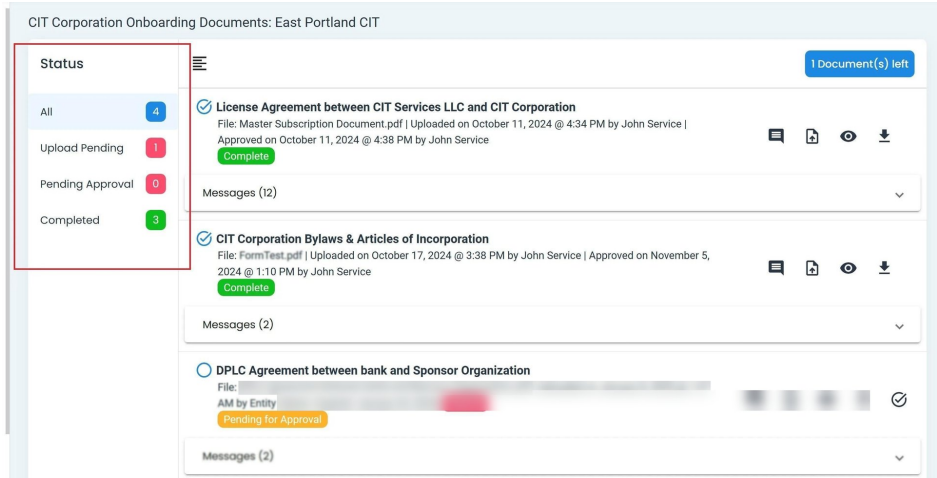


Looking for an Overview?

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

Layout Explanation

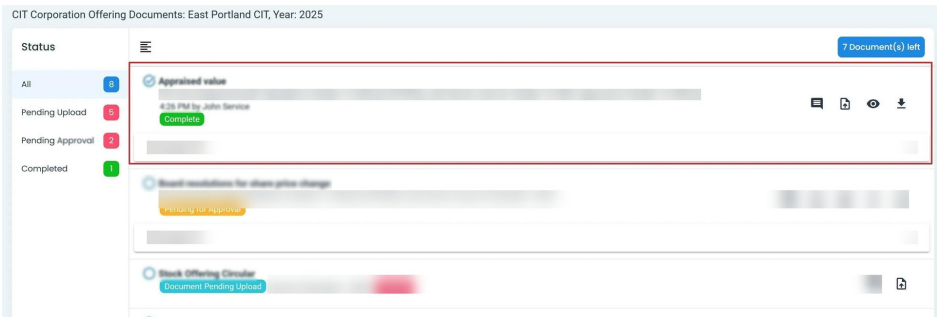
View Details: Tabs Explained



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.

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).

- **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.

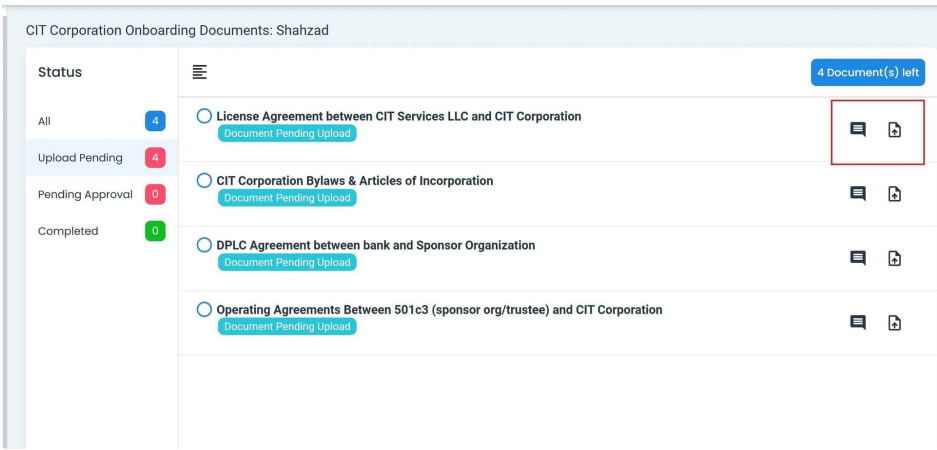
Actions by Tab

See below for actions available in each tab.

Upload Pending Status: Available Actions

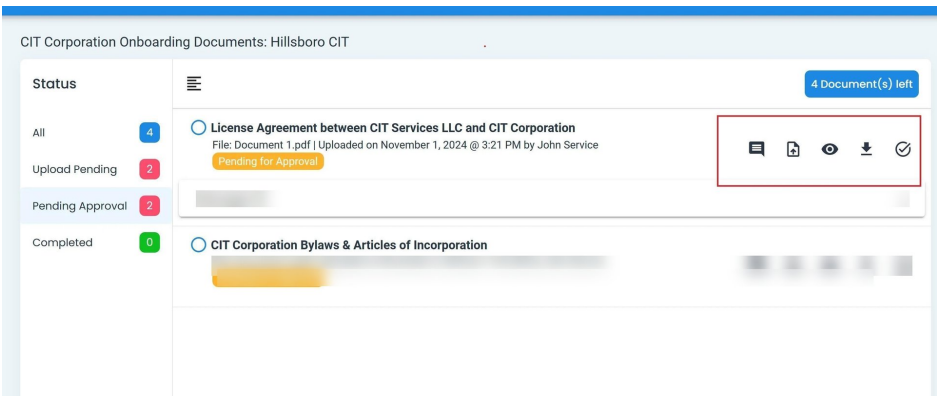
The **Upload Pending** cards contain only two actions:

- 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

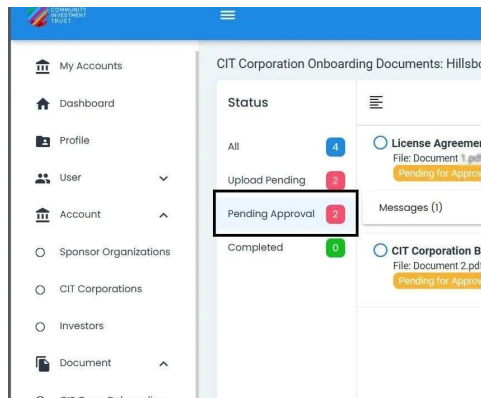
The **Approve Uploaded Document** action is only available on the **Pending Approval** tab, not on completed documents.

## How to Approve Uploaded Document(s)

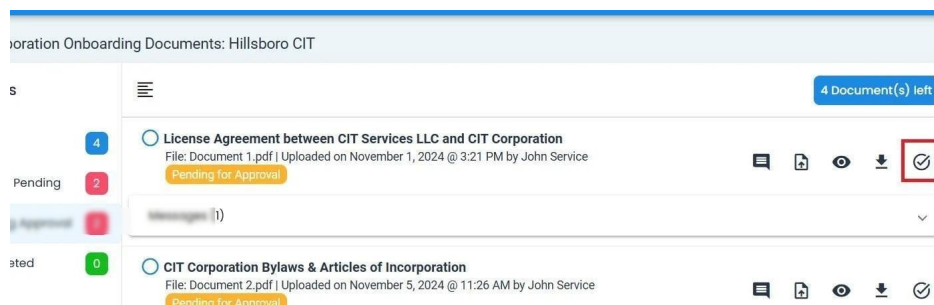
Follow the instructions below to approve an uploaded document.

### To Approve an Uploaded Document:

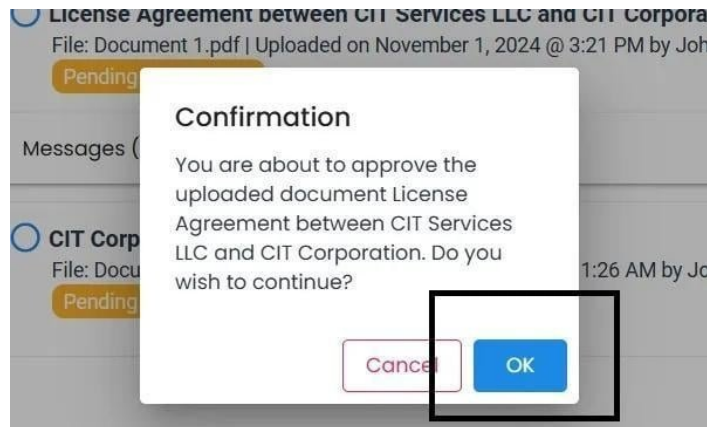
1. Go to the “Pending Approval” tab.



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.

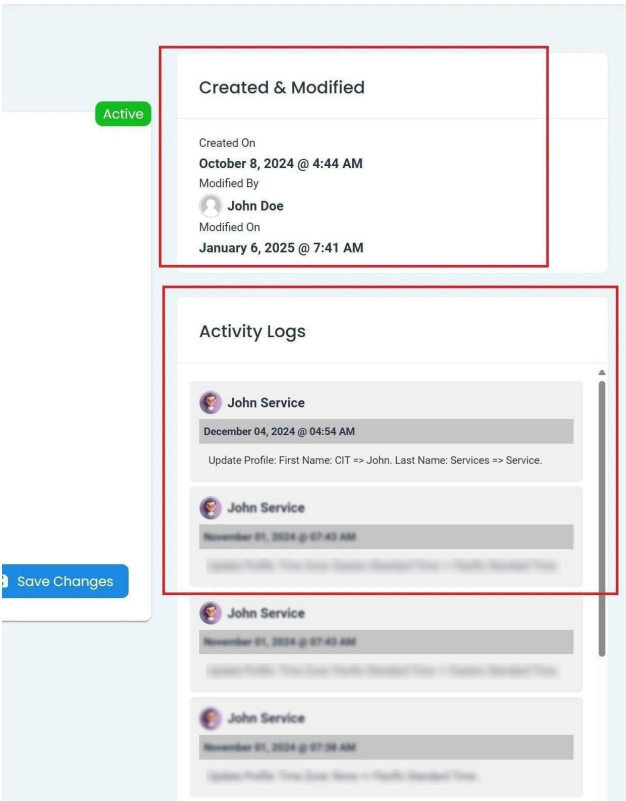
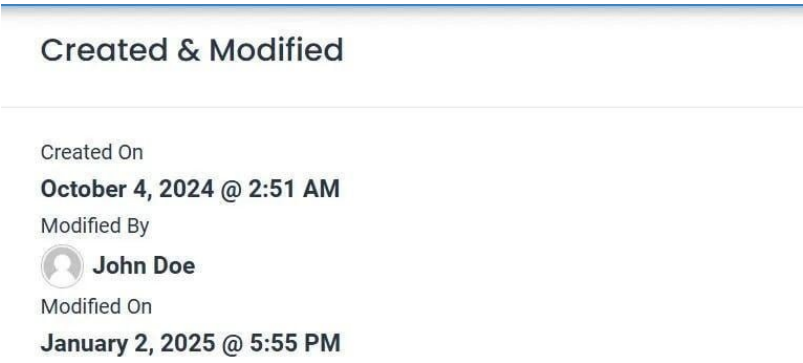


Fig. 27: Information Pane

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.




## 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

 **John Doe**

January 02, 2025 @ 09:55 AM

Update Profile: Logo: Upload New Logo.

 **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.