CIT Community Manual

Community Manual

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

I

My Accounts Category

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

The main feature of the *My Accounts Page* is that it allows you to manage different CIT Corporation accounts under your sponsorship.

Note

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

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I Community Manual: Table of Contents

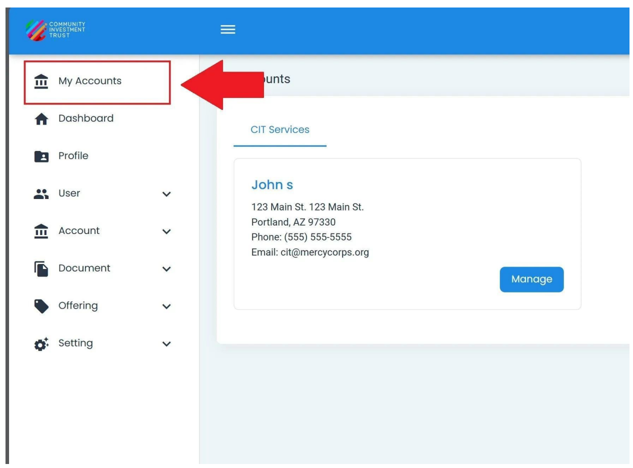
I.1 My Accounts

Managing Different Accounts

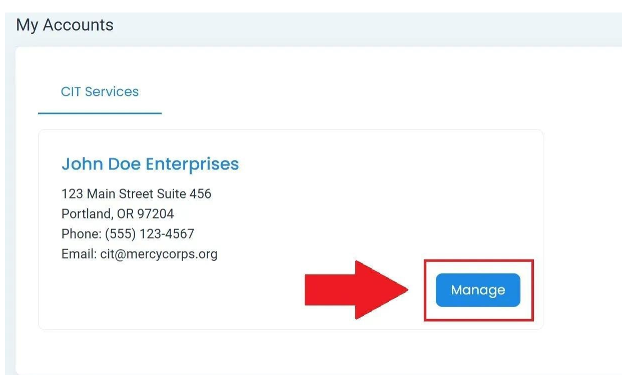
Managing accounts allows you to quickly navigate between the homepages of different accounts.

To **Manage an Account**:

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



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



4. Ensure that the Account Being Managed matches the account that you selected.

Identifying the Current Account

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

Account Name Example

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

It is:

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

I.2 Dashboard

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

Dashboard Tiles

Hover Over or Click a Tile to Explore Further

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

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.

Dashboard Tables

The **Dashboard** section contains two tables:

- *CIT Corporation Summary Table*
- *CIT Corporation Cashout Table*

Table Features

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

- *CIT Corporation Summary Table*

Dashboard Table Locations

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

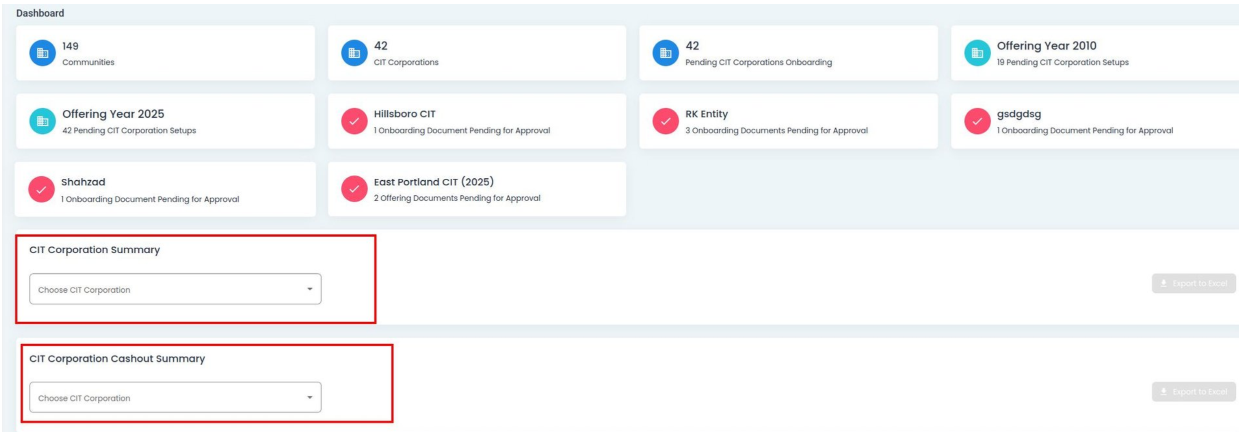


Fig. 1: Dashboard, Main Tables

CIT Corporation Summary Table

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

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

Location: CIT Corporation Summary Table

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

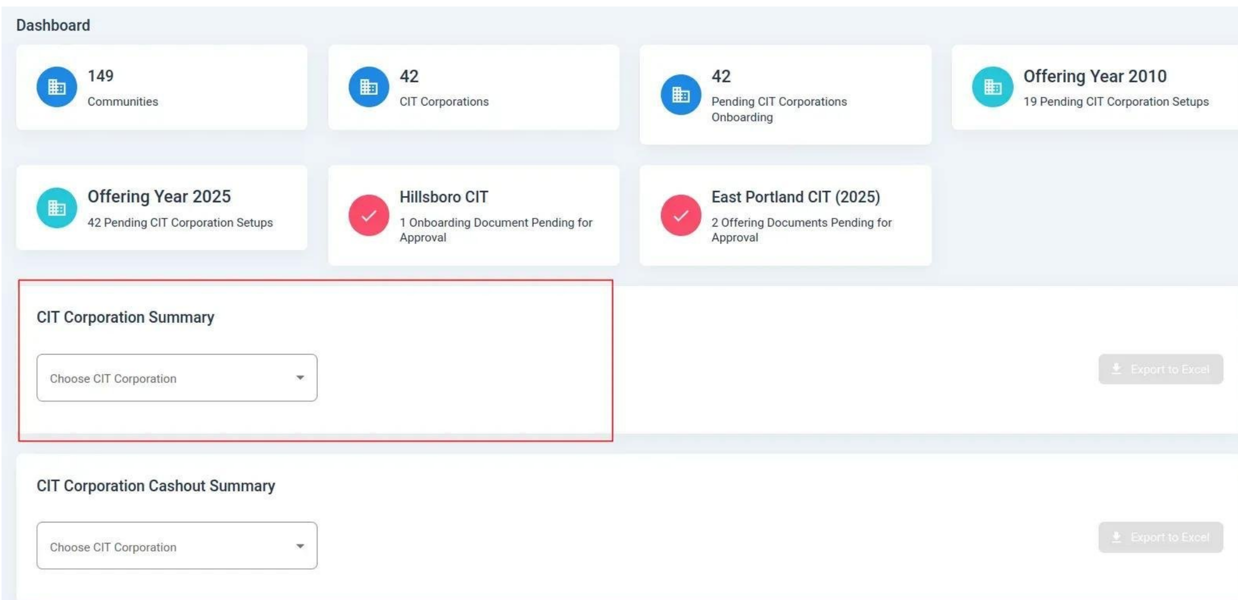


Fig. 2: Dashboard, CIT Corporation Summary Table Location

Columns: CIT Corporation Summary Table

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

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

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

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

CIT Corporation Cashout Table

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

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

Location: CIT Corporation Cashout Table

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

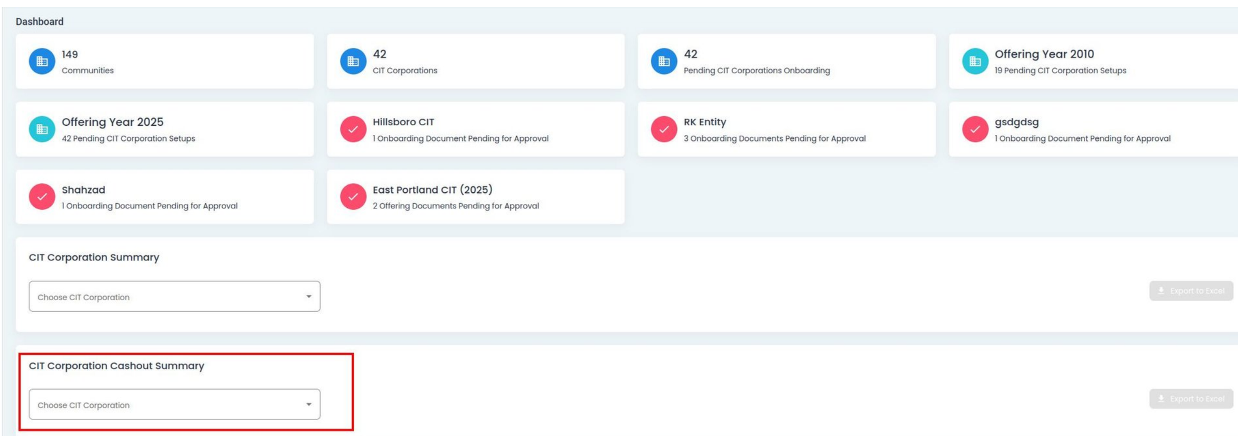


Fig. 4: Dashboard, CIT Corporation Cashout Table Location

Columns: CIT Corporation Cashout Table

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

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

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

- **Total Current Investment Amount** : The total amount currently invested in the Offering.
- **Total Cashout Shares** : The total number of shares issued specifically for cashing out under the Offering.
- **LC Limit** : The lowest price a stock can reach during a single trading session.
- **Total Original Cashout Amount** : The total amount of shares that have been cashed out under the Offering.
- **Total Cashout Shares** : The total number of shares that have been cashed out under the Offering.

CIT Corporation Summary (or Cashout) Table

Note

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

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

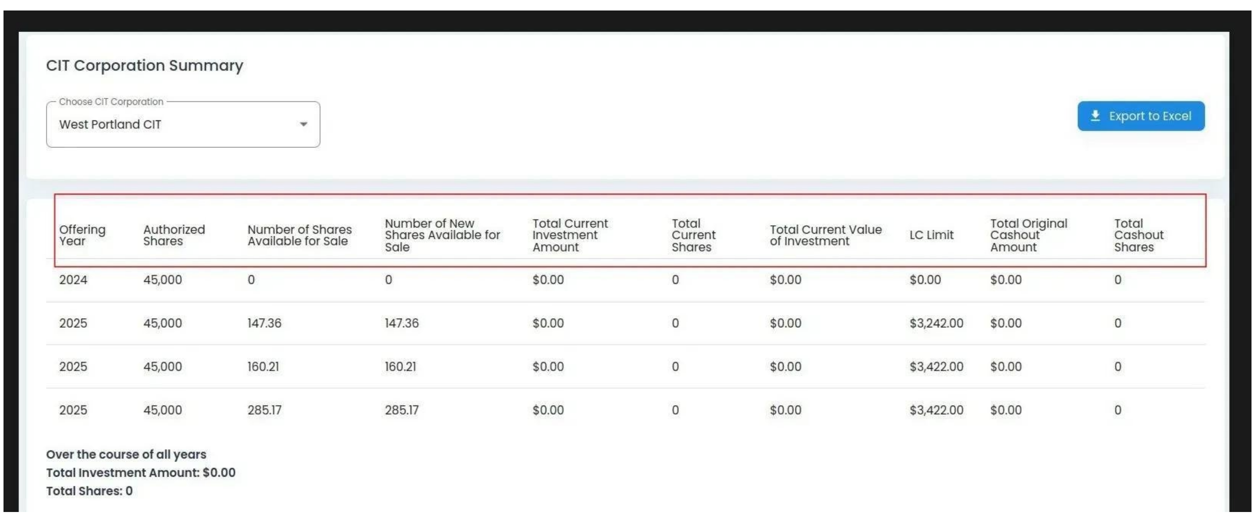
Table of Contents

How to Filter Table

Step 1: Locate the CIT Corporation Summary Dropdown

Fig. 6: Dashbaord, 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.

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

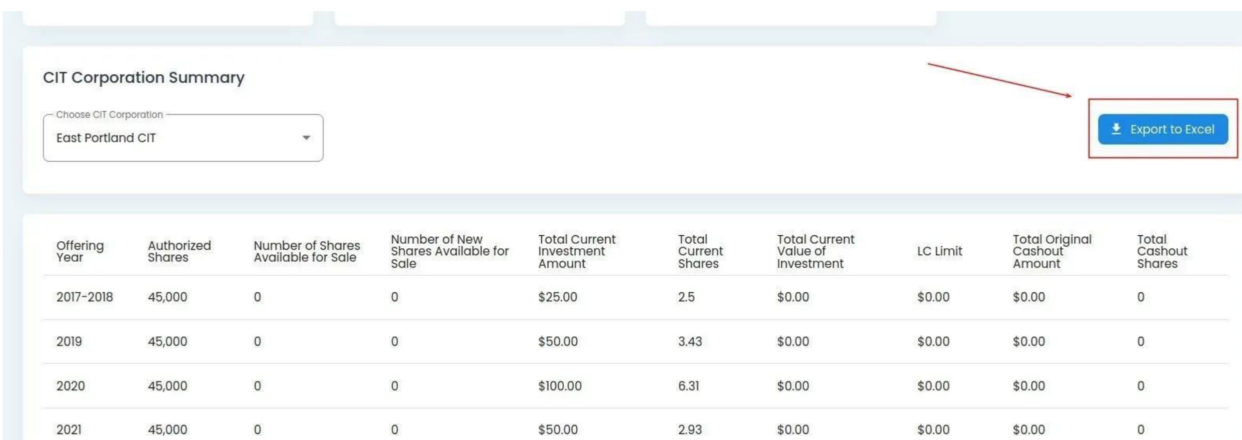
Dashboard, CIT Corporation Summary Table Expanded

How to Export Table

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

To do so:

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



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

Fig. 8: Dashboard, CIT Corporation Summary Table Export Button Location

Export File Successfully Downloaded

The `Excel` file will be downloaded to your default download location.

I.3 Profile

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

Table of Contents

Profile Location

The **Profile** page is the third item listed in the **Primary Sidenavigation** menu.

Don't see the Primary Sidenavigation menu?

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

Profile Information

The **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

- Reference to Red item Red items are *required* and cannot be left blank.
- Blue items are *optional*.

Upload Logo

To Upload:

1. Find the `Upload Logo` section.

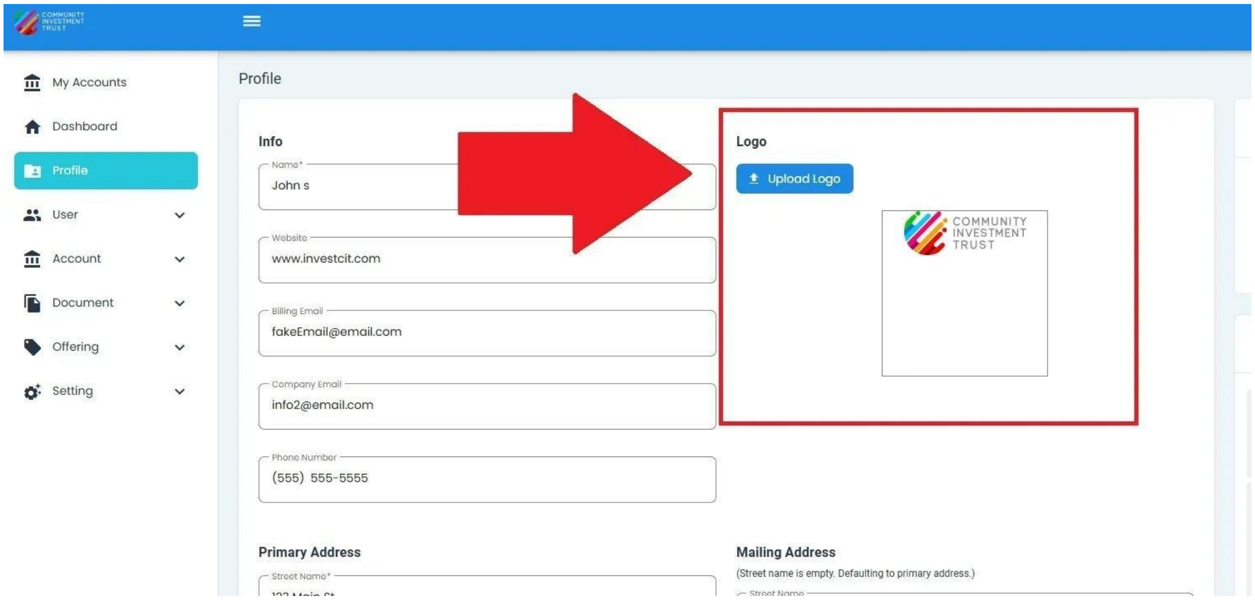


Fig. 9: Upload Logo Location

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

Name and Contact Information

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

Location: Name and Contact Information section

The **Name and Contact Information** section is the first section of the Profile Information section. It's locaed at the topleft of the page:

The following fields can be edited:

- Name
- Website
- Billing Email
- Company Email
- Phone Number

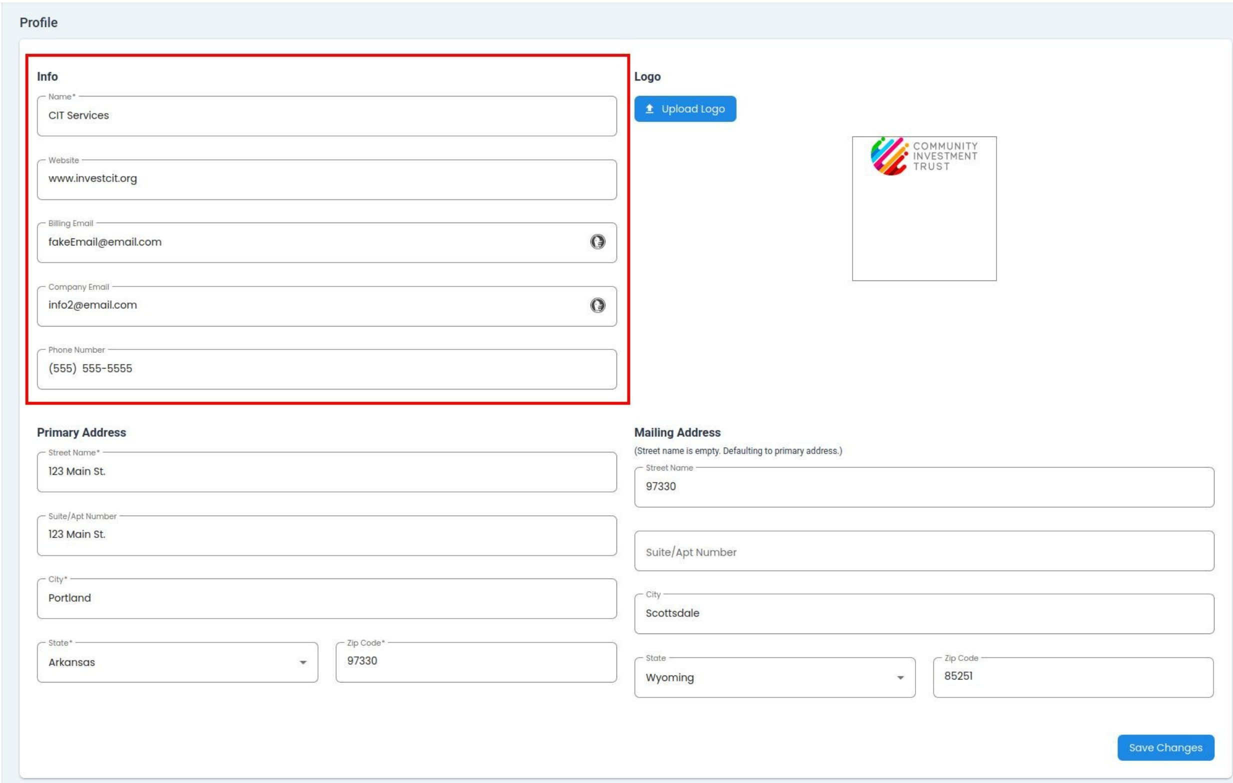


Fig. 10: Name and Contact Information Location

Primary Address

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

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

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

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

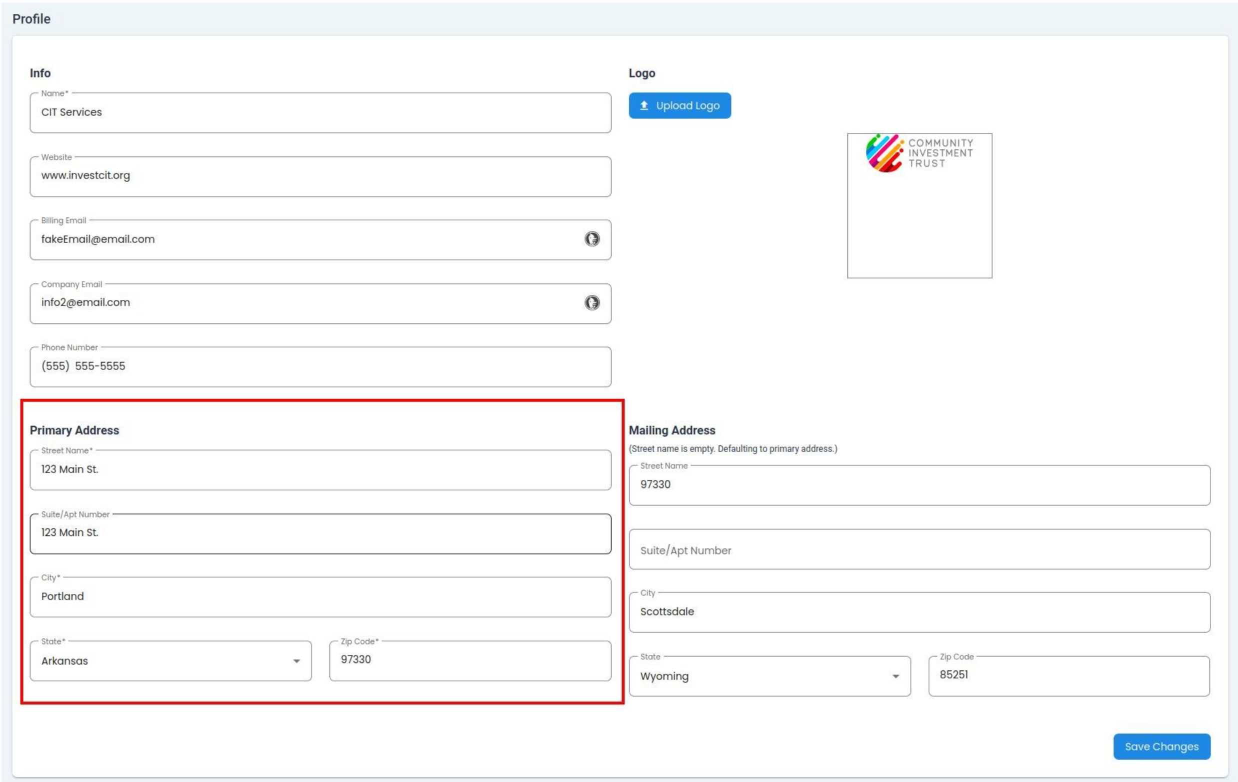


Fig. 11: Primary Address Location

Mailing Address

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

Location: Mailing Address section

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

Note

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

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

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

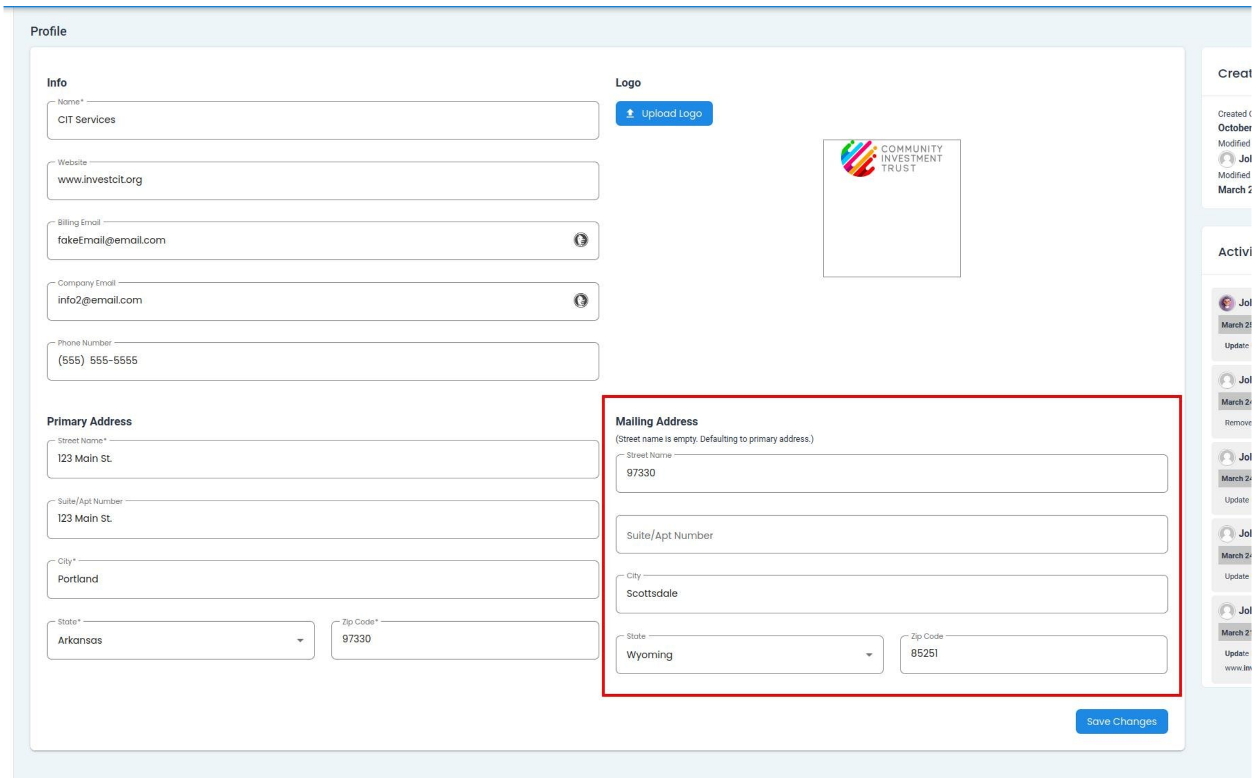


Fig. 12: Mailing Address Location

I.4 User

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

- *User Accounts*
- *Staff Accounts*

Users

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

Table of Contents

User List Homepage

The **Users** section opens up to the **User List** table:

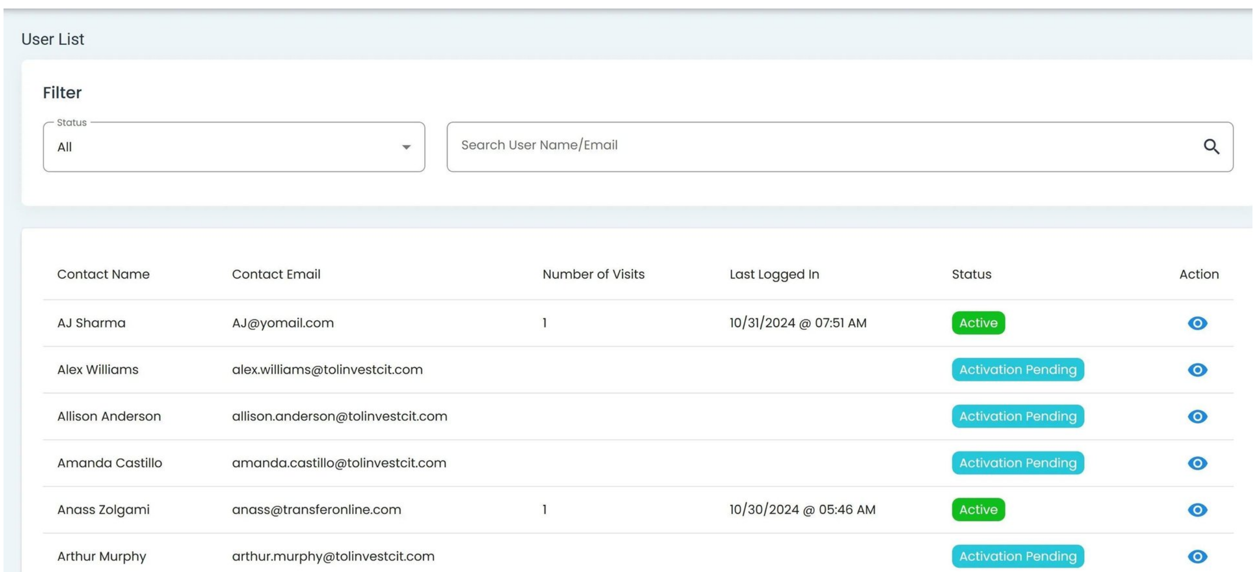


Fig. 13: Users, User list Table

Need help finding the Staff Homepage?

See *Staff Homepage Location* for more information.

Columns: User List Table

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

- **Contact Name**
- **Contact Email**

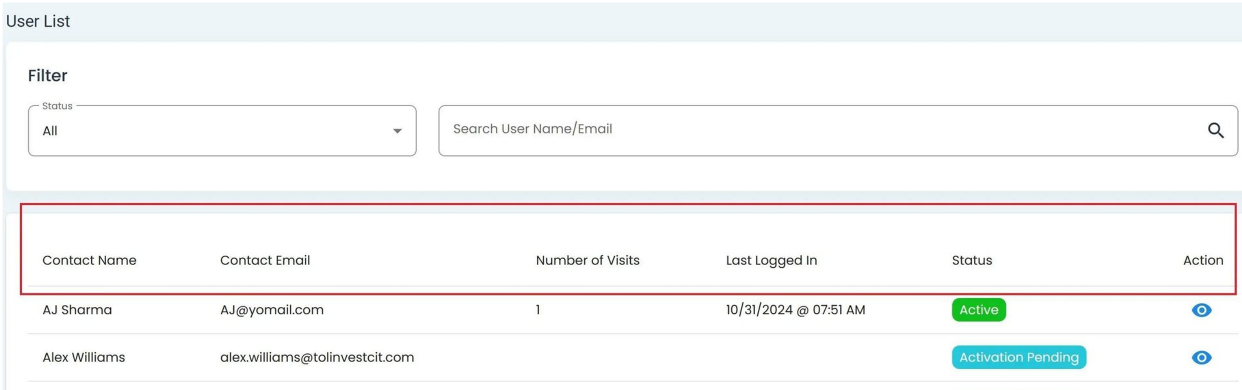


Fig. 14: User, User, Column Options

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

Search and Filter Options

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

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

Status Options

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

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

To Filter Users by Status:

1. Click the **Status** dropdown at the top of the user list.
2. Select your desired filter option.
3. The table updates automatically to display matching users.

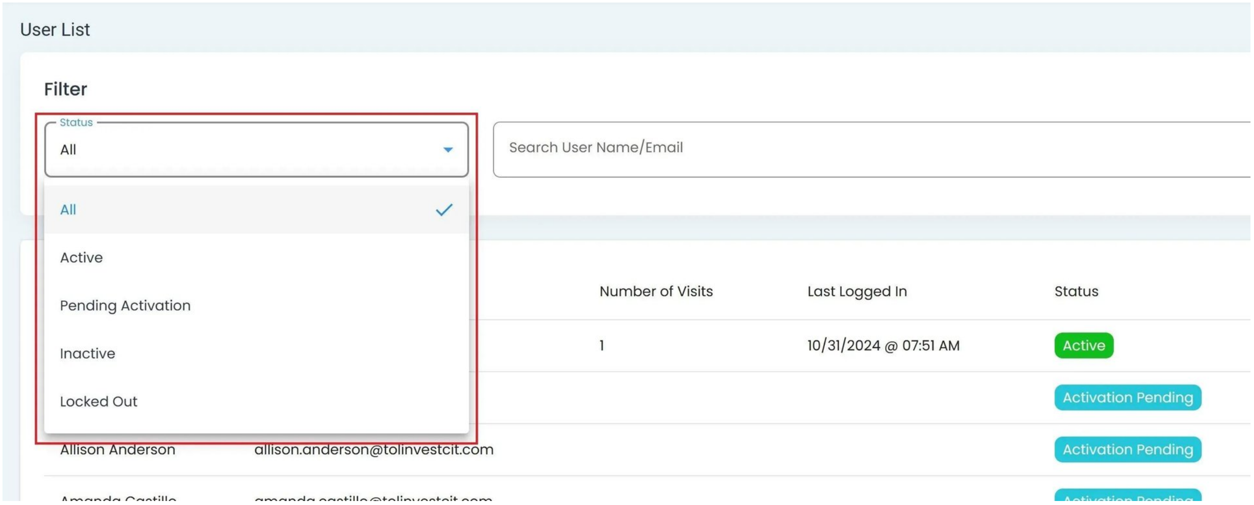


Fig. 15: User, User Homepage, Status Filter Dropdown

View User Details and Other Remaining Sections

The remaining sections are universally shared throughout the app.

These sections include:

- *View User Details: User Information Tab*
- *View User Details: Accounts Tab*
- *Overview of the Information pane*

Users Homepage Location

To Find the Staff List Homepage:

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 ▷ **User** category.
3. Select **Users** from the dropdown.

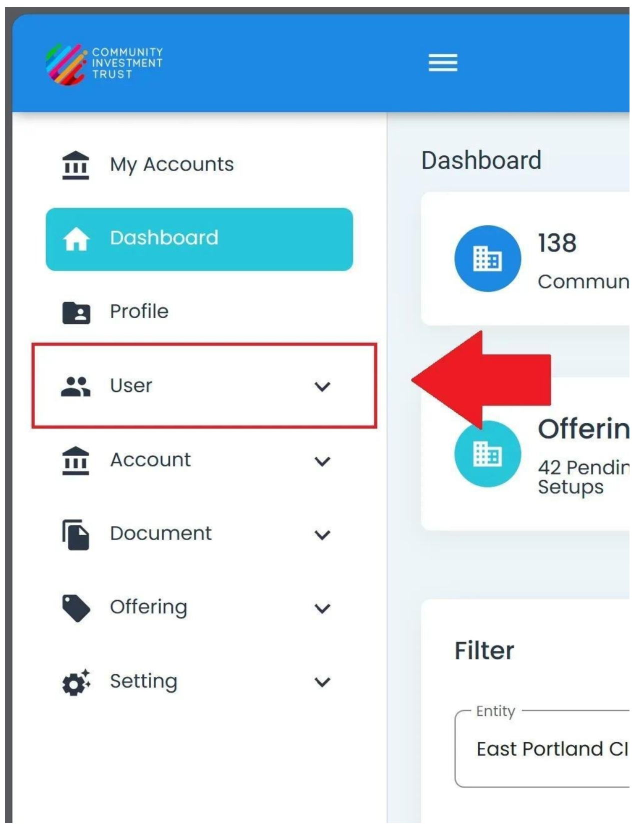


Fig. 16: User, Staff Primary Sidenav Location

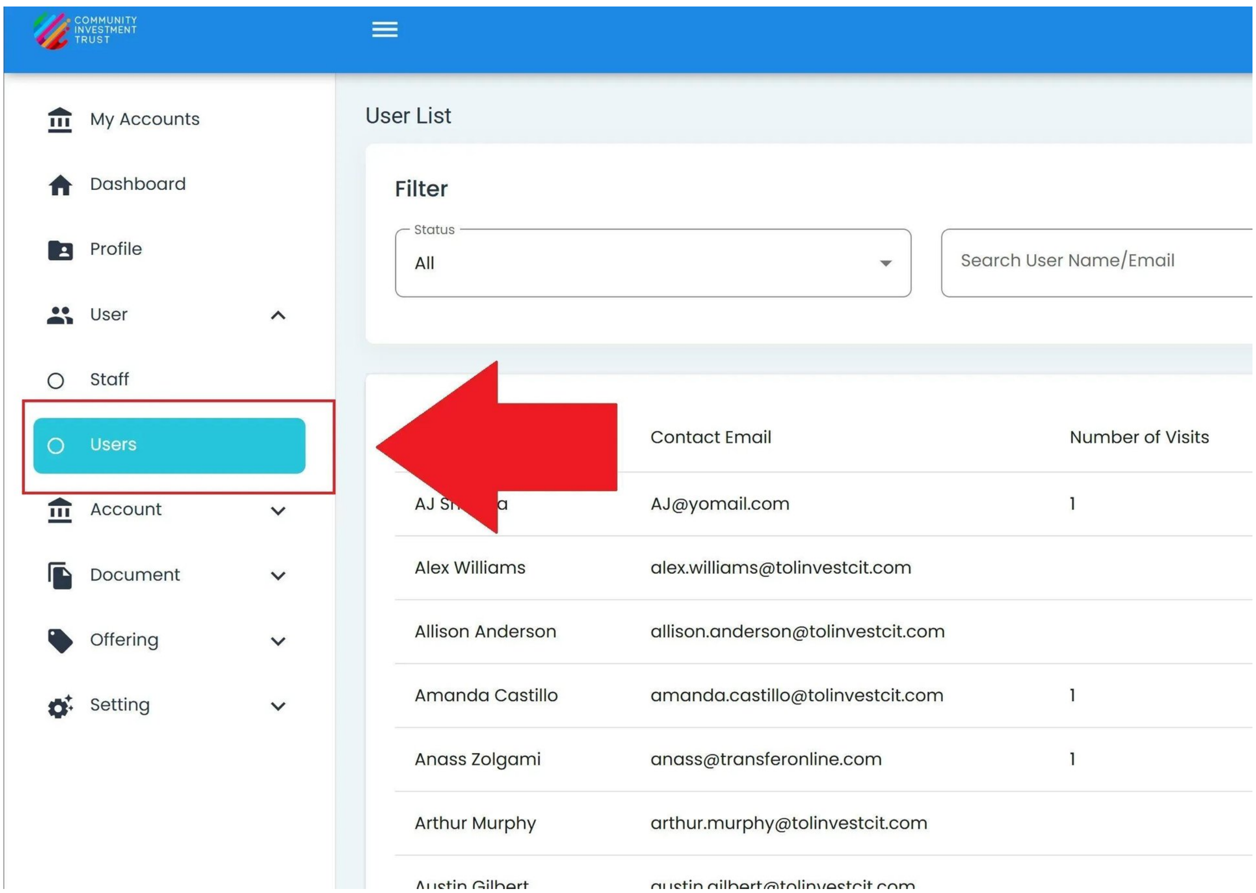


Fig. 17: Users Homepage

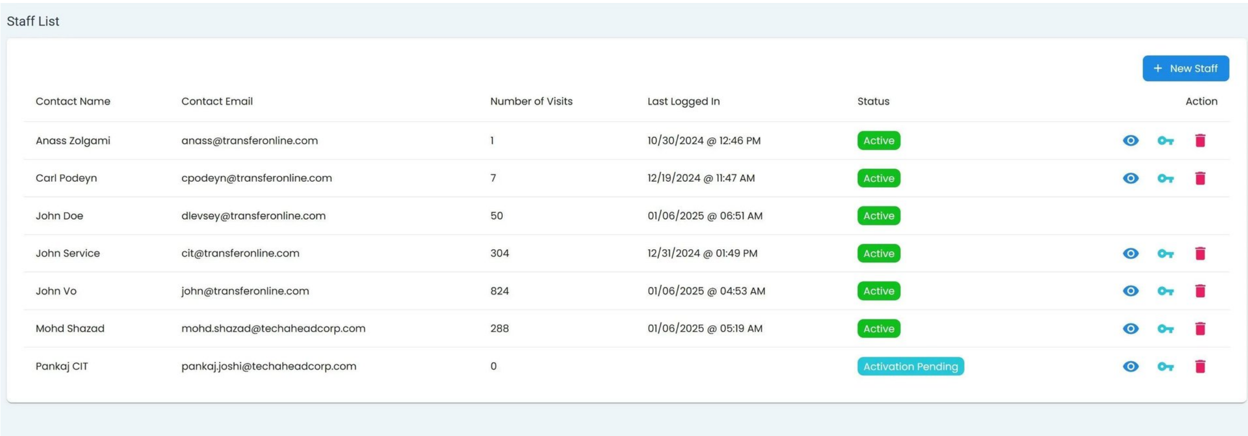
Staff

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

Table of Contents

Staff List Homepage

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



Staff List

+ New Staff

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:46 PM	Active	
Carl Podeyn	cpodeyn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	
John Doe	dlevsey@transferonline.com	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. 18: Staff Homepage

Need help finding the Staff Homepage?

See *Staff Homepage Location* for more information.

Features: Staff List Table

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

These details include details related to or including:

- **Contact Information** , or
- **Status** .

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

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

Columns: Staff List Table

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

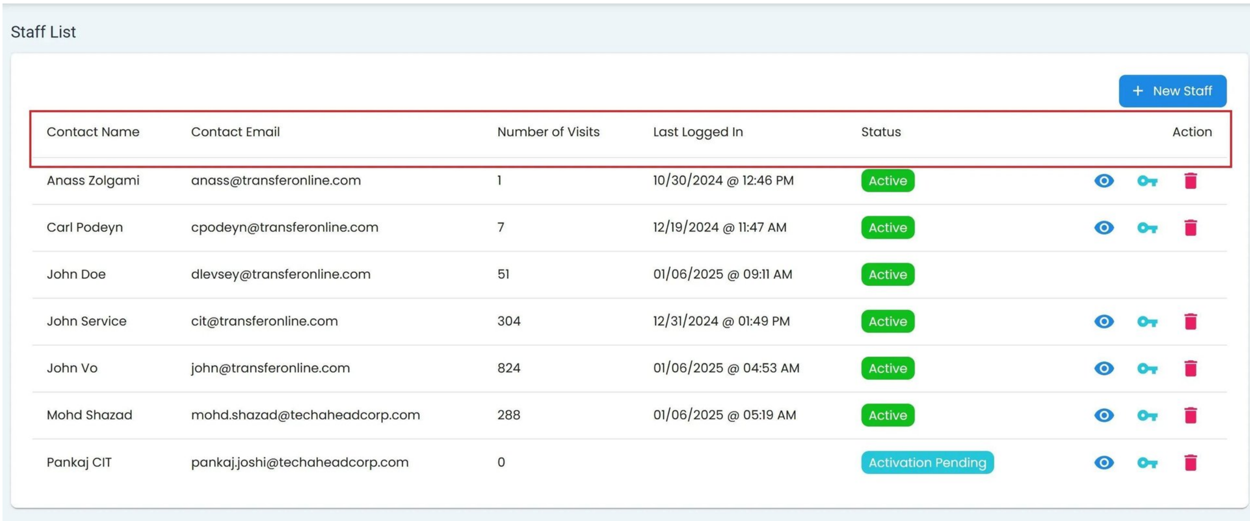


Fig. 19: Users, Staff Homepage, Columns

These **Columns** include:

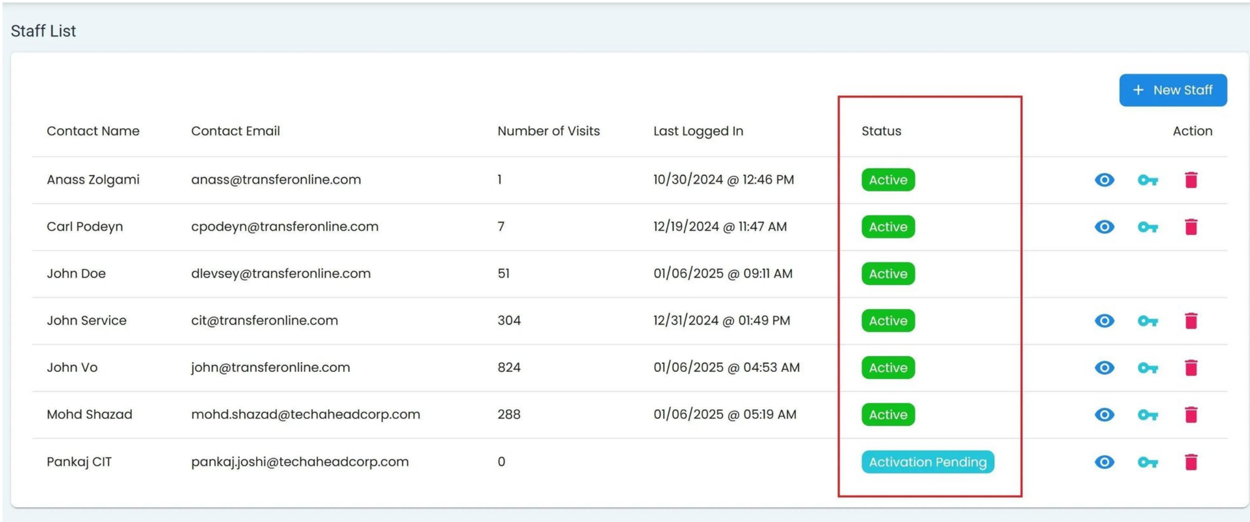
- **Contact Name** – Name associated
- **Contact Email** – Email address for the contact.
- **Number of Visits** – Total times user accessed the system.
- **Last Logged In** – Most recent date user logged in.
- **Status** – Current
- **Action** – Different actions that can be performed

Filter by Status

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

Possible Status options include:

- **All**
- Active
- Pending Activation
- **Inactive**
- Reference to Locked Out item Locked Out


Staff List

+ New Staff

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

View Staff Details and Other Remaining Sections

The remaining sections are universally shared throughout the app.

These sections include:

- *View User Details User Information Tab*
- *View User Details Accounts Tab*
- *Overview of the Information pane*

Staff Homepage Location

To Find the Staff List Homepage:

1. Locate the primary 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 ▷ **User** category.
3. Select **Staff** from the dropdown.

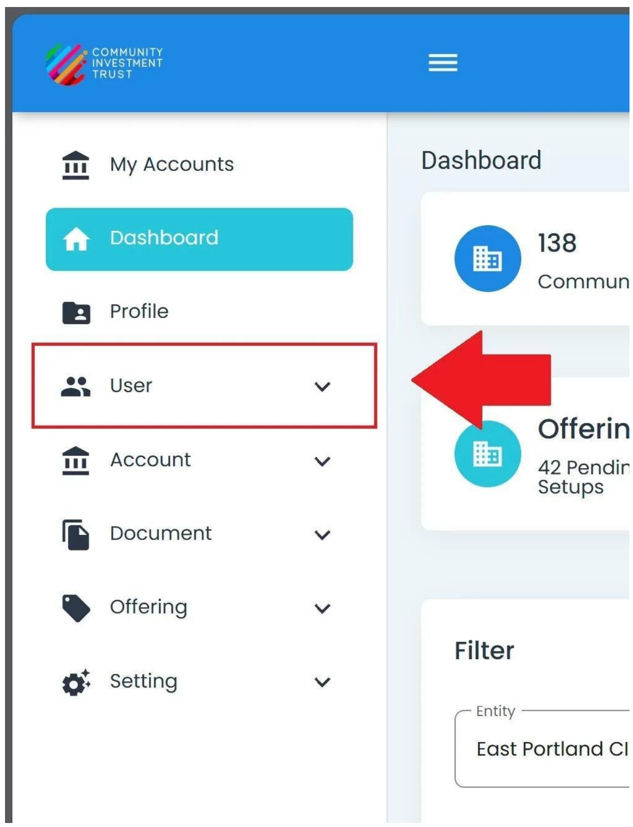


Fig. 20: User, Staff Primary Sidenav Location

I.5 Account

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

- *CIT Corporations*
- *Investors*

CIT Corporations List

Table of Contents

Features

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

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

Location: CIT Corporations Section

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

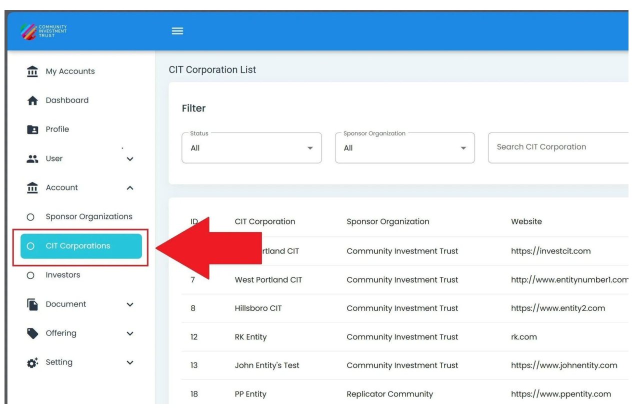
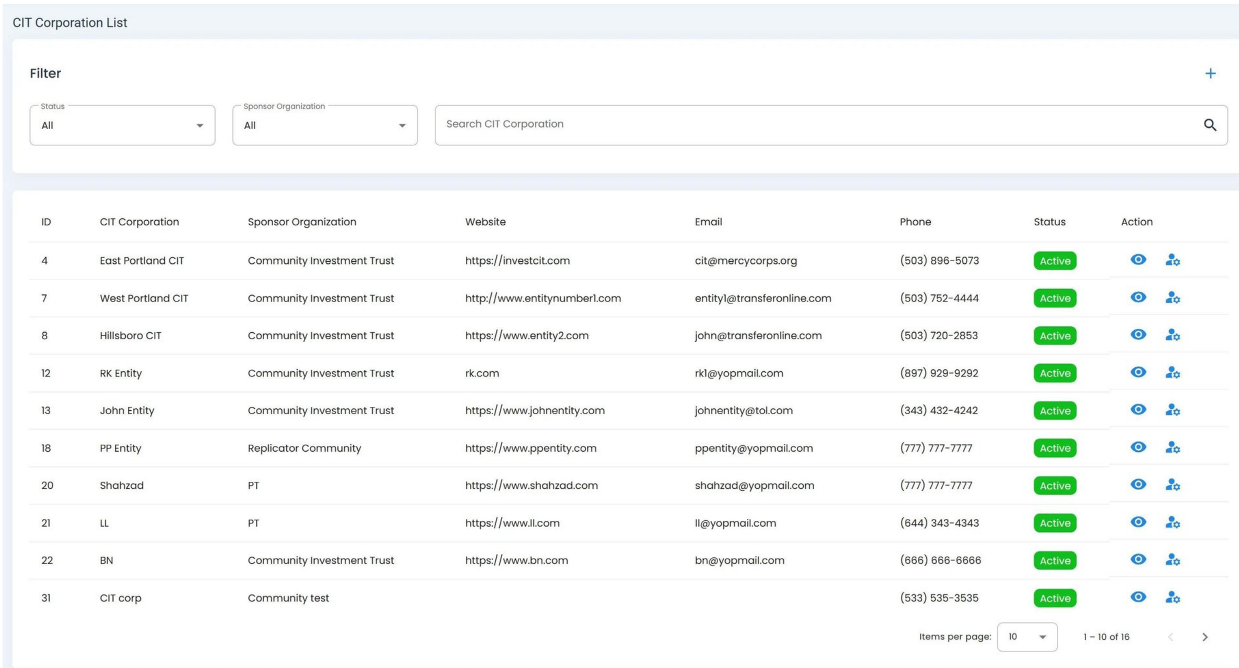


Fig. 21: Account, CIT Corporations, Homepage, Primary Sidenav Location

CIT Corporations List Table

The **CIT Corporations** section opens up to **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	rk1@yopmail.com	(897) 929-9292	Active	
13	John Entity	Community Investment Trust	https://www.johnentity.com	johnentity@tol.com	(343) 432-4242	Active	
18	PP Entity	Replicator Community	https://www.ppentity.com	ppentity@yopmail.com	(777) 777-7777	Active	
20	Shahzad	PT	https://www.shahzad.com	shahzad@yopmail.com	(777) 777-7777	Active	
21	LL	PT	https://www.ll.com	ll@yopmail.com	(644) 343-4343	Active	
22	BN	Community Investment Trust	https://www.bn.com	bn@yopmail.com	(666) 666-6666	Active	
31	CIT corp	Community test			(533) 535-3535	Active	

Fig. 22: CIT Corporations Section, Homepage, CIT Corporations List Table

Table: CIT Corporations List

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

Columns: CIT Corporations List Table

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

These **Columns** include:

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

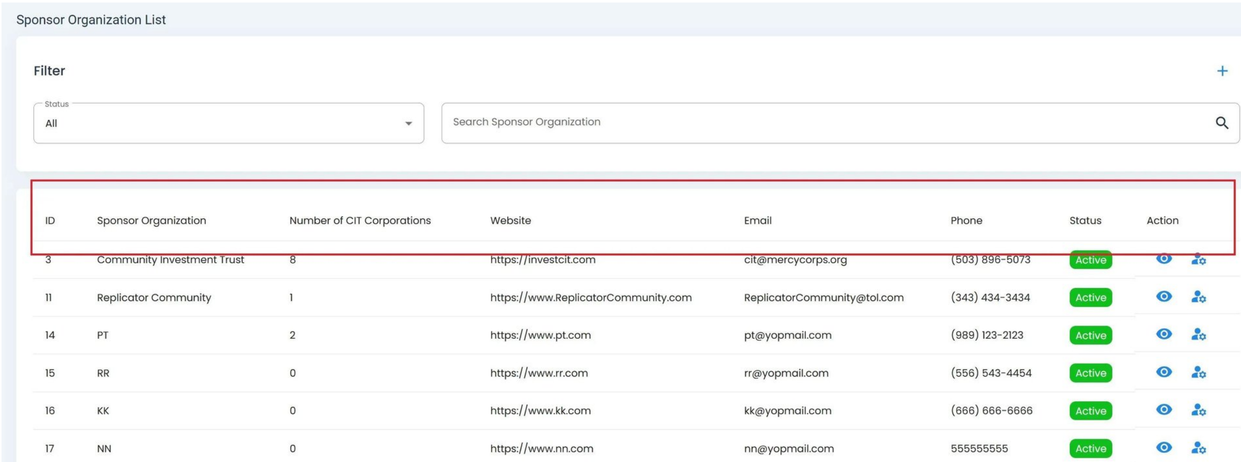


Fig. 23: Account, Sponsorship Organizations, Homepage, Table Columns

Available Actions

The `Action` column provides the following operations:

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

View CIT Corporation Details

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

- *CIT Corporation Information Tab*
- *Legal Information Tab*
- Cashout Price per Share
- *Users Tab*

How to Access Corporation Details

1. Select the *View Account Details* button for the corporation you want to view.

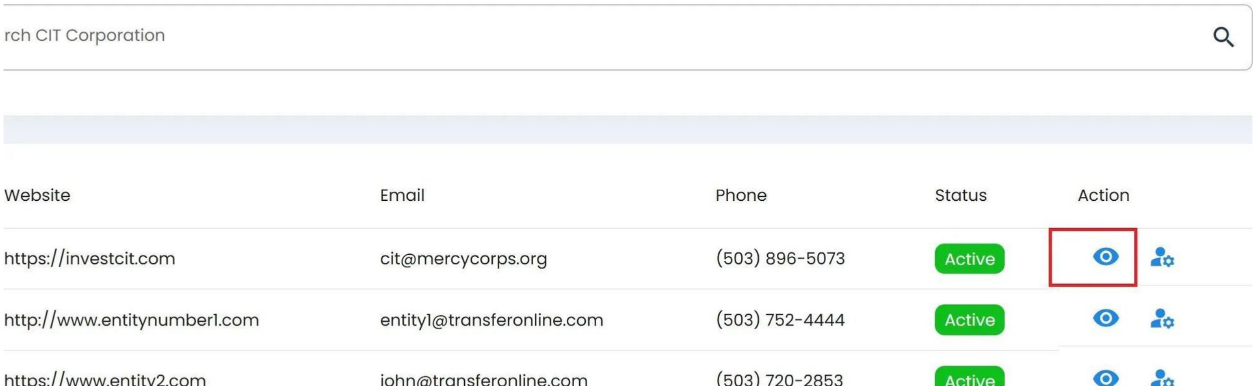


Fig. 24: CIT Corporation, Homepage, View More Icon Location

Action Will Take You to the Corporation Information Tab

See *CIT Corporation Information Tab* for more information.

Corporation Information Tab

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

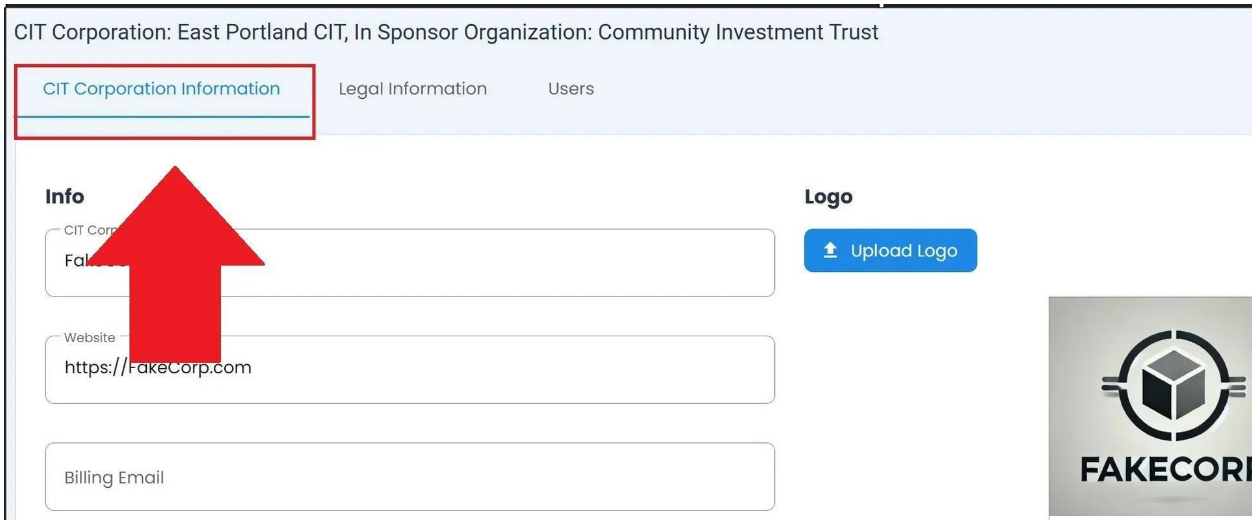


Fig. 25: CIT Corporation, View Corporation, Corporation Information Tab Location

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

- CIT Corporation Name
- Website
- Billing Email
- Company Email
- Phone Number

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

- Primary Address,
- Mailing Address, or
- Logo,

See the Profile Section for More Information

See *Profile* section for information on how to edit fields and fill out billing and company information.

Upload Logo

Unique Logo Section for CIT Corporation Information Tab

This section is slightly different from the *Profile* section.
It allows for two options to be selected under the logo. The other sections do not.

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

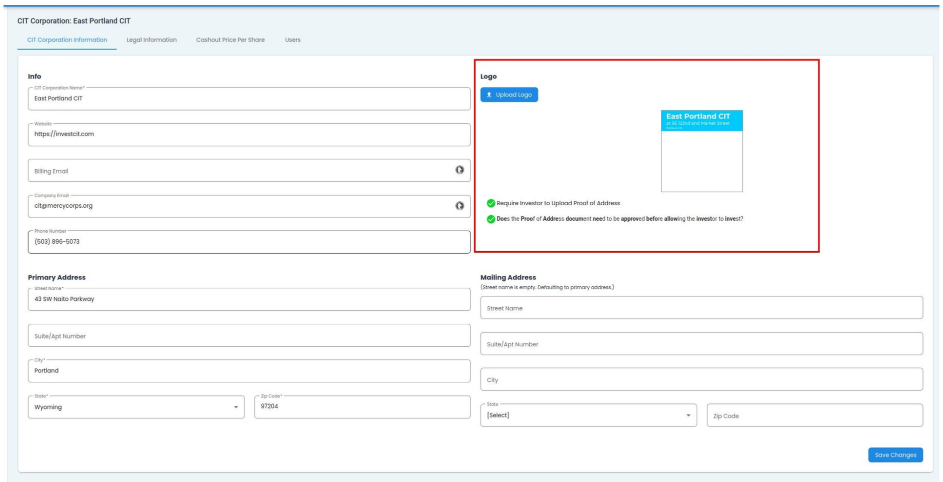


Fig. 26: Sponsorship Organization, Upload Logo Location

Upload Logo Options

The **Upload Logo** section allows you to upload a logo for your **CIT Corporation**. It also allows ytou to select two 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 tob e approved before allowing the investor to invest?** This option requires the address to be approved before allowing the investor to invest.

Other Tabs

You can also view and modify the following tabs:

- *Users Tab*
- *Legal Information Tab*

Legal Information Tab

The **Legal Information** tab is the second tab inside the *View Account Details* section.

Information Available in the Legal Tab

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

- Legal Name
- EIN
- State of Incorporation

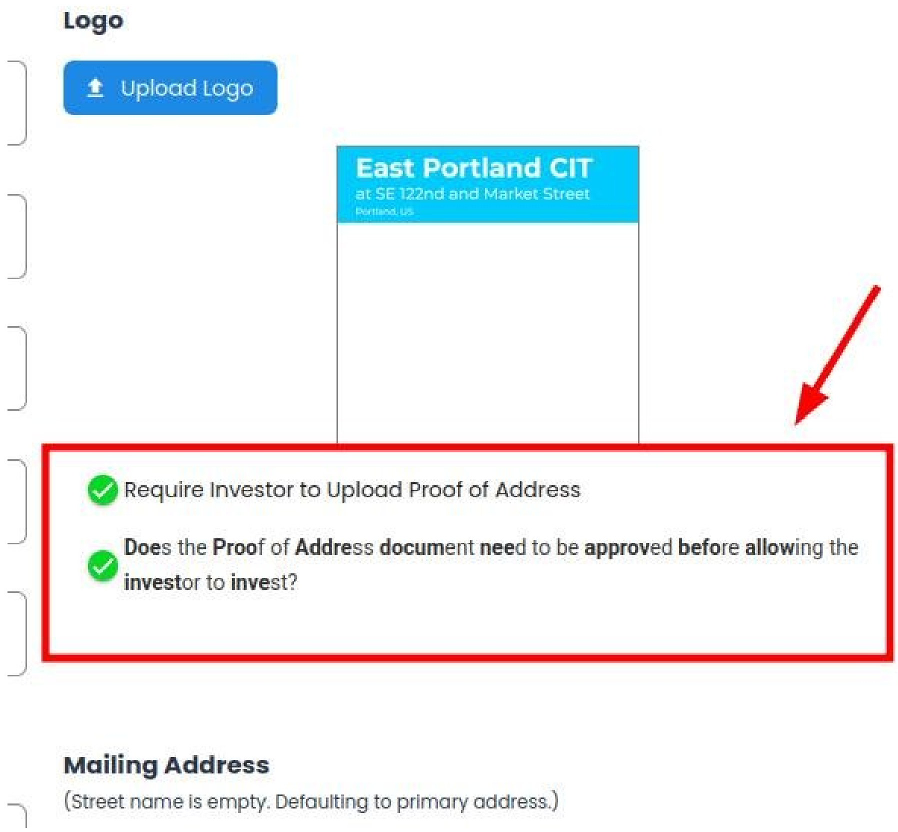


Fig. 27: CIT Corporation, Upload Logo Location

- State of Operating
- Date Formed
- State Filing Number

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

- Address ,
- Company Contact ,
- Accounting Contact , Or
- Legal Contact .

Editing Legal Information for CIT Corporations

1. Place cursor in the field you want to edit.
2. Input the desired information.
3. Click *Save Changes* at the bottom of the page.

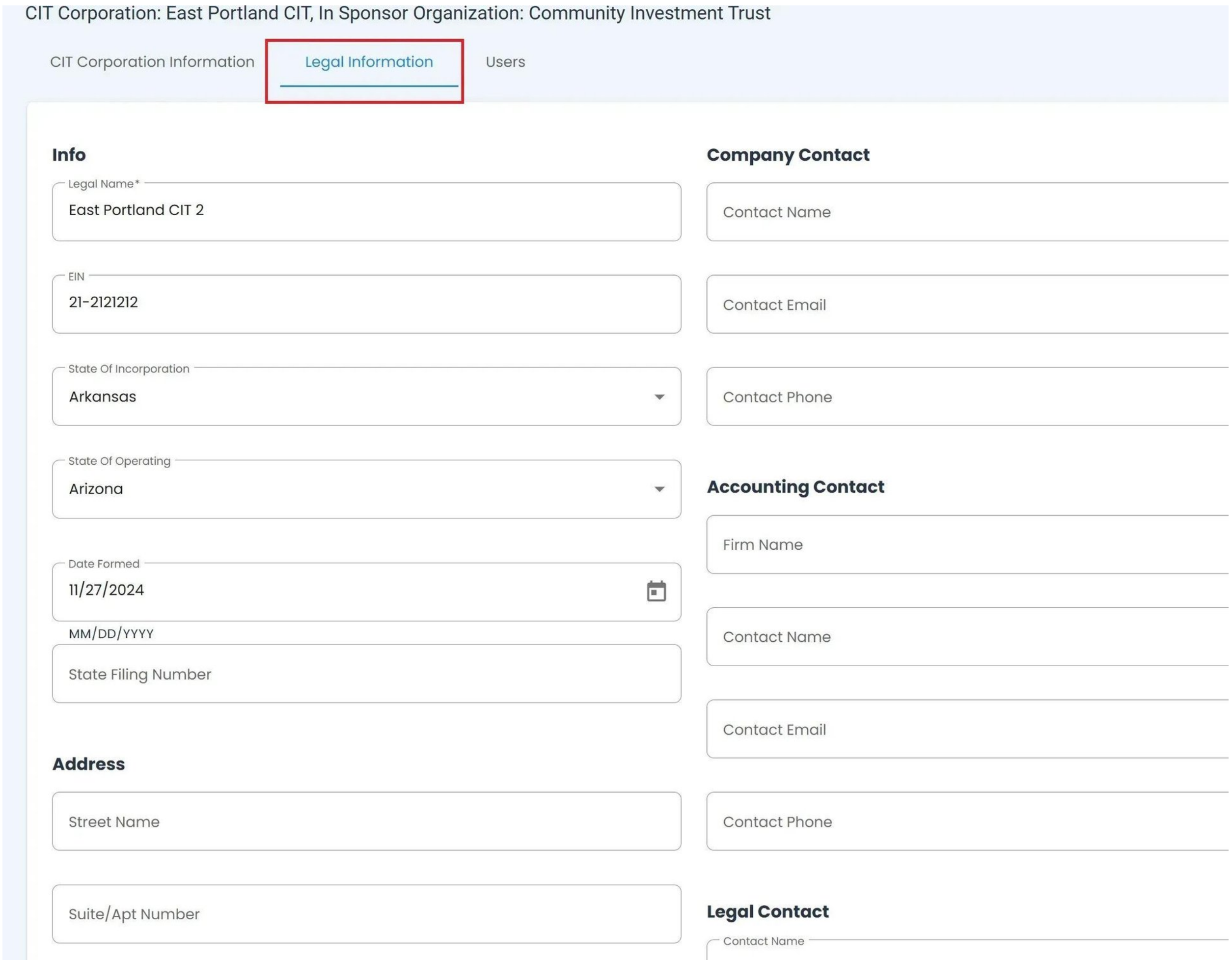


Fig. 28: CIT Corporation, Legal Information Tab

Trying to Edit Other Company Information?

- See *Editing Company Information* to learn more about editing your company's profile information.

Users Tab

The **Users** tab is a list of all users associated with the **CIT Corporation**.

Navigating the Users Tab

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

- *View User Details*
- *Edit Permissions*
- Remove User Access

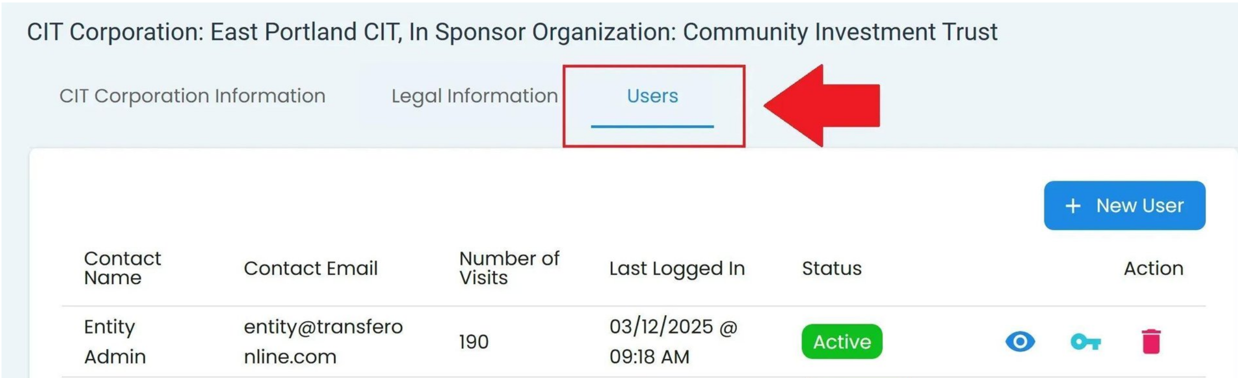


Fig. 29: CIT Corporation, Users Tab Location

Adding a New User to the CIT Corporation

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

Permissions Options

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

Investors

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

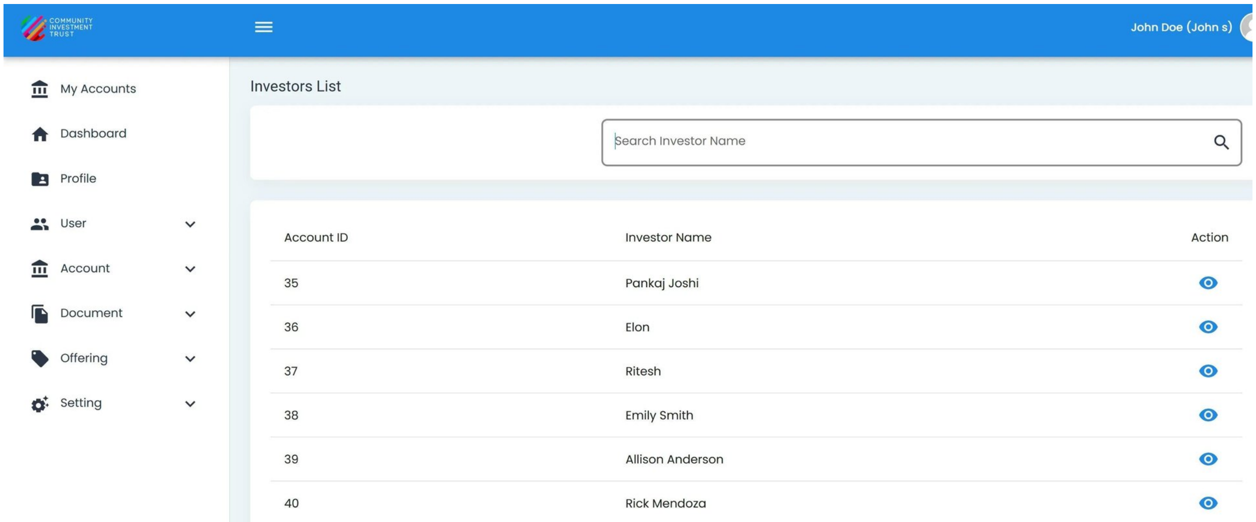


Fig. 30: Investors List Homepage

Overview

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

Search Functionality

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

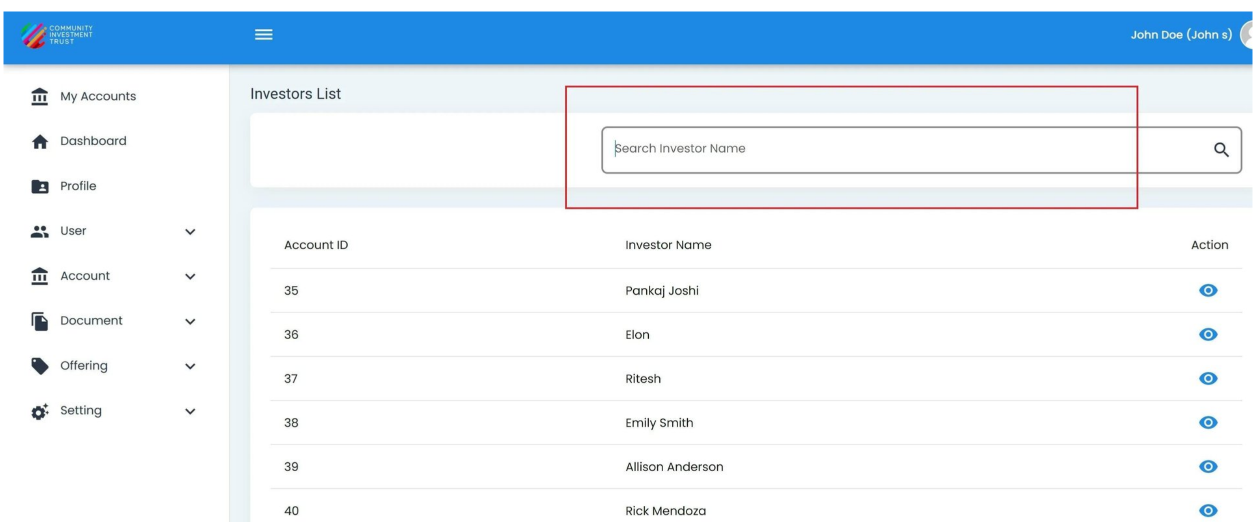


Fig. 31: Investors List, Search Bar Location

Investors Table

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

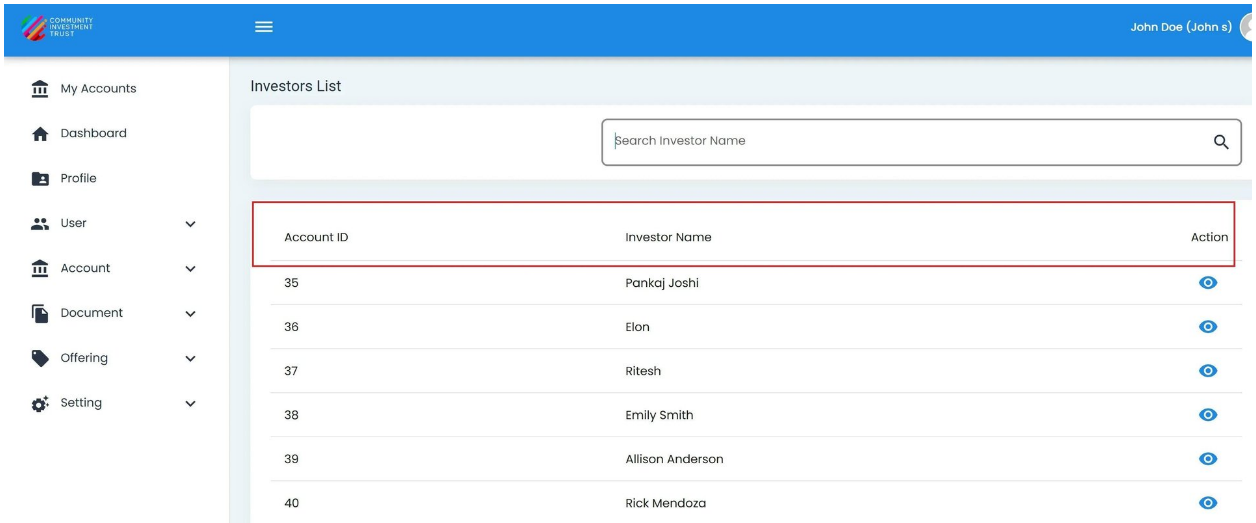


Fig. 32: Investors List, Table Column Names

Table Columns

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

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

Action Column

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

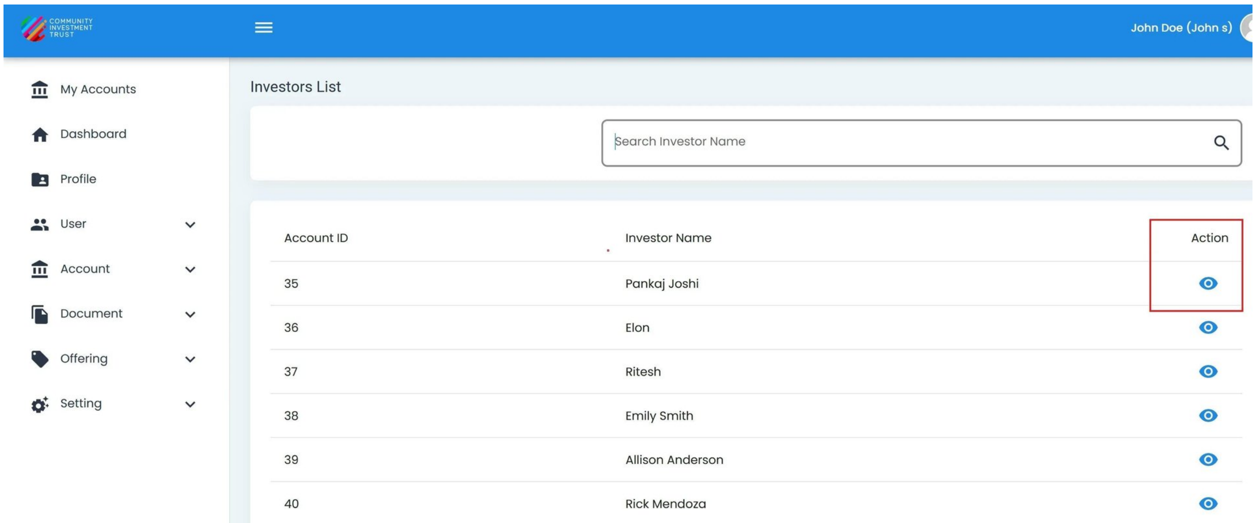


Fig. 33: Investors List, Action Column Location

Available Actions

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

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

View Investor Details

The *View Investor Details* action allows you to access detailed information about an investor.

How to View Investor Details

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

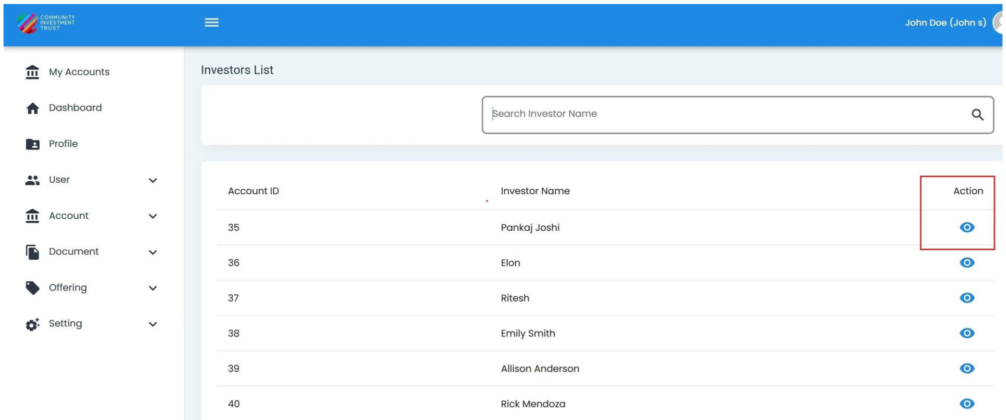


Fig. 34: Investors List, View Action Location

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

Beneficiaries Tab

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

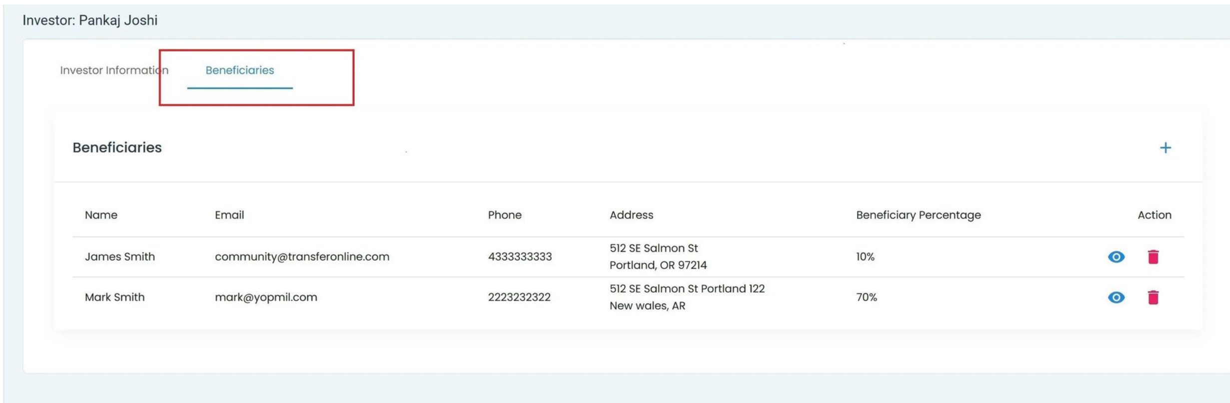


Fig. 35: Investor Details, Beneficiaries Tab Location

Beneficiaries Tab Overview

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

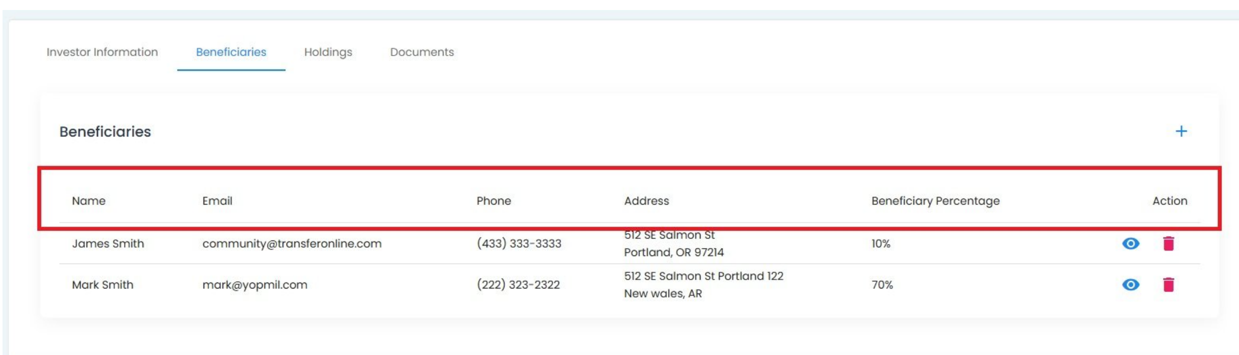


Fig. 36: Investor Details, Beneficiaries Tab View

Beneficiary Table

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

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

Available Actions

The `Action` column allows you to:

- *View Beneficiary Details* View detailed information about the beneficiary
- *Delete Beneficiary* Remove the beneficiary from the investor's account

How to Add a New Beneficiary

See Add New Beneficiary for more information.

Adding a New Beneficiary

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

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

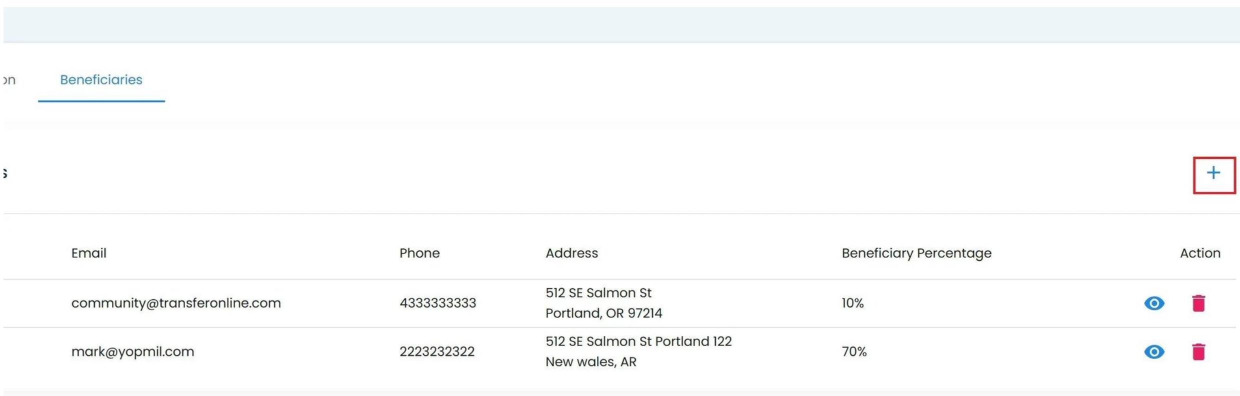


Fig. 37: Investor Details, Add Beneficiary Button Location

2. The Add Beneficiary popup will appear.
3. Place cursor in desired field.
4. Fill in relevant information.

   Possible fields include:

   - First Name (required)
   - Last Name (required)
   - Email (required)
   - Phone (optional)
   - Beneficiary Percentage (required)
   - Address information (optional)
5. Fill in necessary information, which can include the following
6. Click the *Save* button to add the beneficiary.

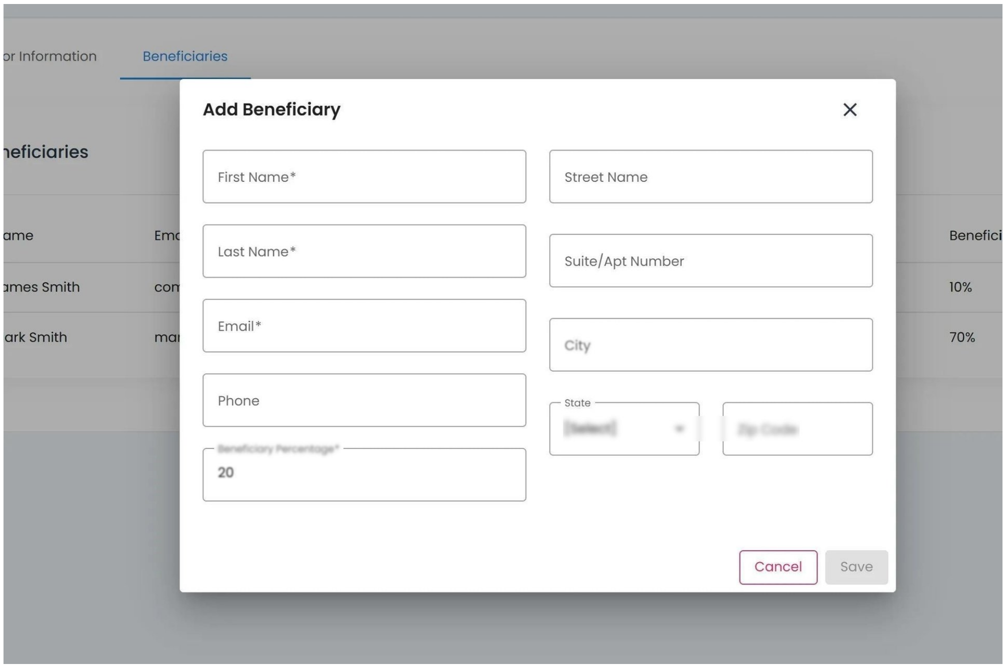


Fig. 38: Add Beneficiary Popup

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

Investor Details Tab

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

Contents

Location: Investor Details Tab

The **Investor Details** tab will be the second tab that appears when *Viewing Investor Information*.

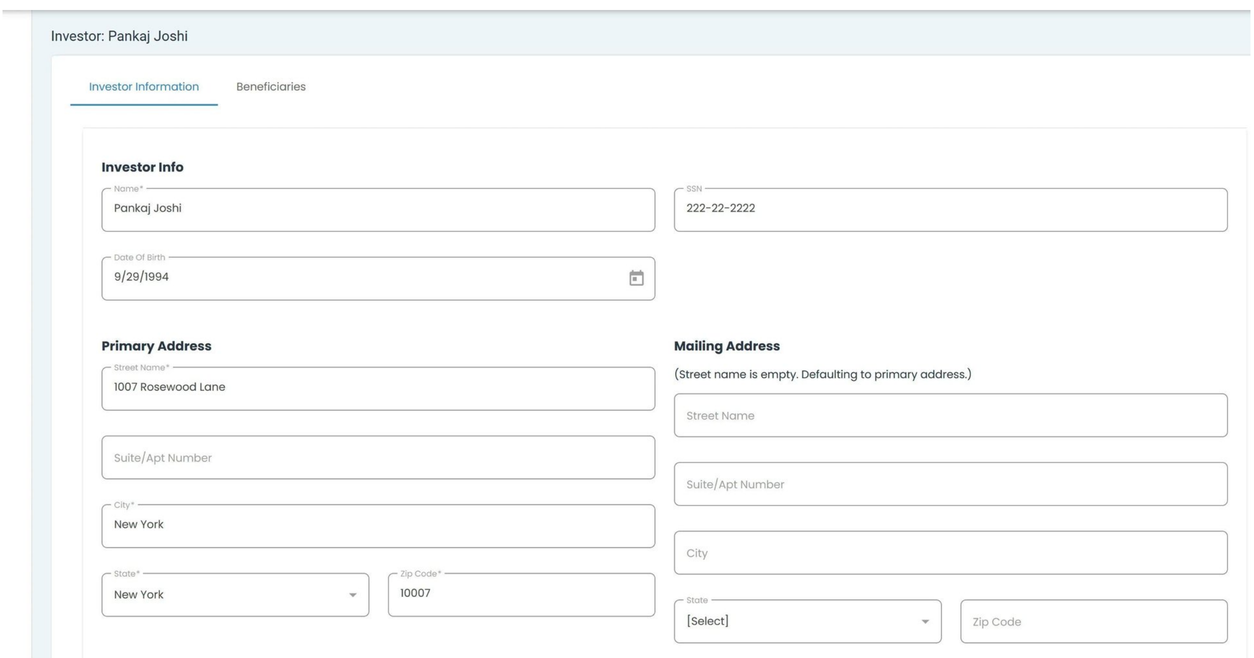


Fig. 39: Investor Details Tab Location

Note

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

Investor Information Section

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

- Investor Info
- Primary Address
- Mailing Address

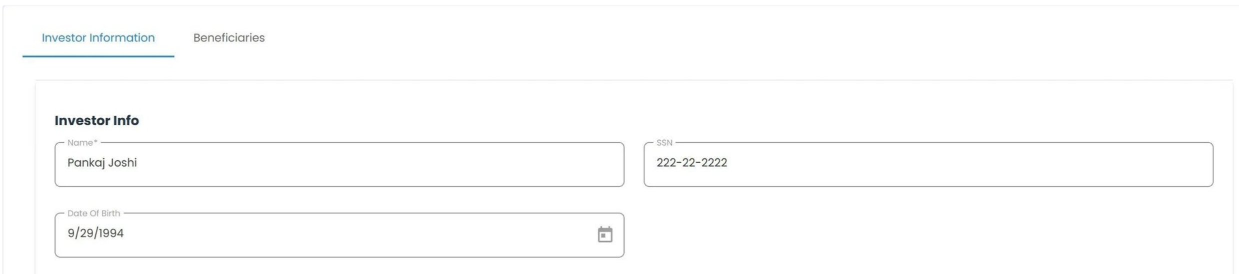


Fig. 40: Investor Information Section

Available Information

The Investor Details tab displays the following information categories:

Personal Information

The **Personal Information** displays:

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

Primary and Mailing Address

See Primary and Mailing Address section for details.

To Edit an Investor's Details:

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

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

2. Type the changes you want to make.
3. Click the *Save Changes* button at the bottomright of the page.

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

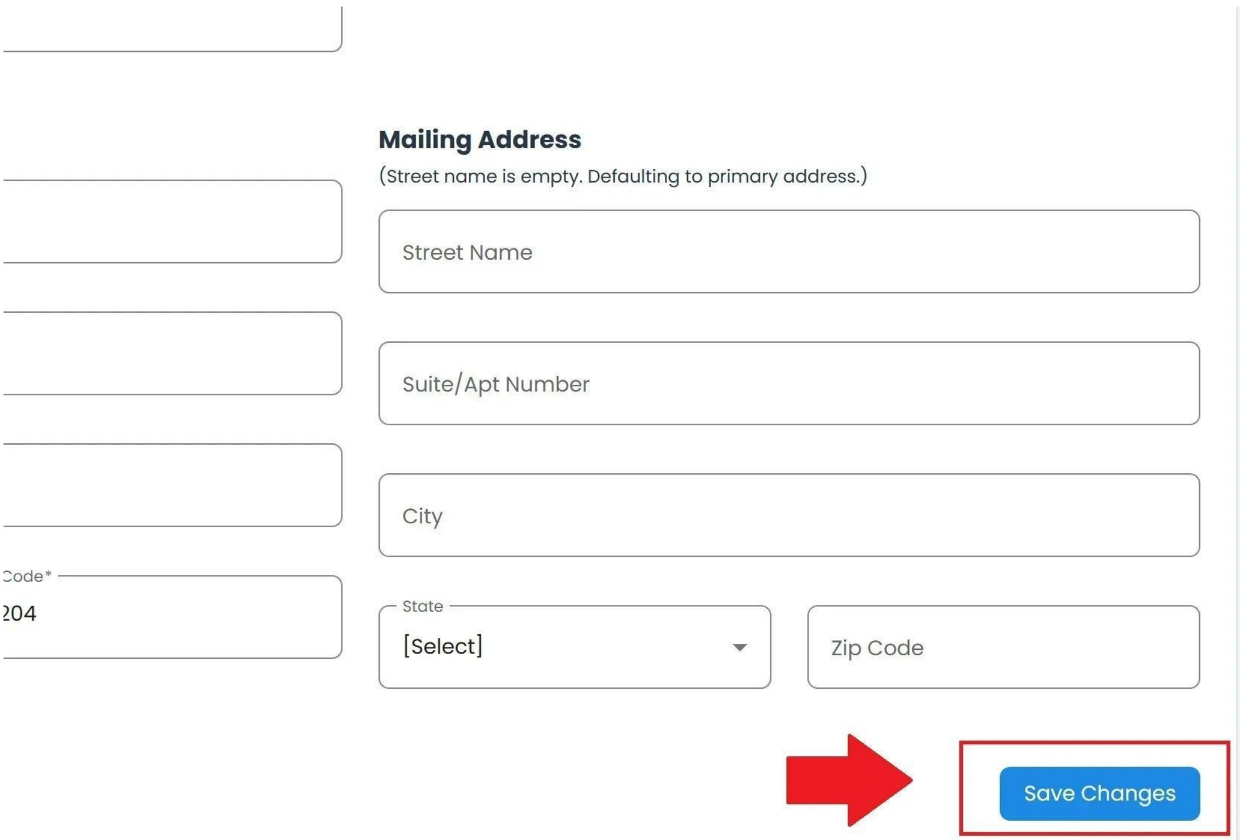


Fig. 41: Investor Details Save Changes

Holdings List Tab

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

Contents

Location: Holdings Tab

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

Fig. 42: Account, Investors, Investor Information, Holdings Tab

Columns: Holdings List Table

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

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

Relevant Sections

- See *Filter Holdings by Status* for more information on how to filter holdings by status.

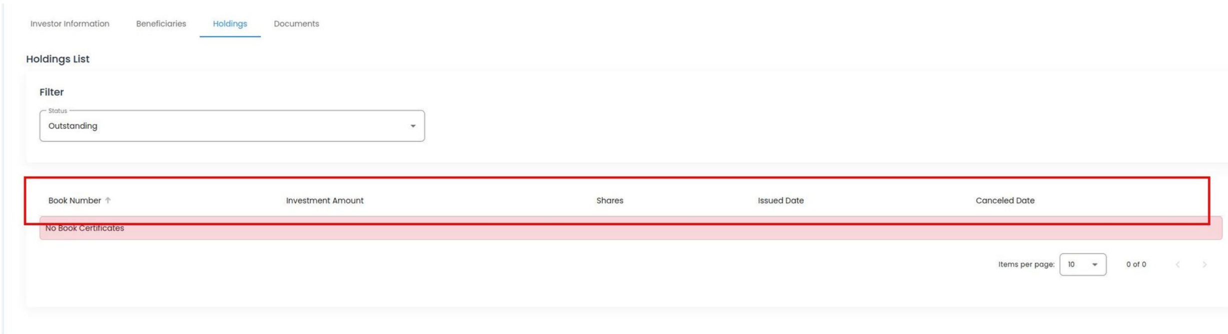


Fig. 43: Account, Investors, Investor Information, Holdings Tab, Columns Explained

Filter Holdings by Status

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

To Filter Holdings by Status:

1. Find the **Status** column.

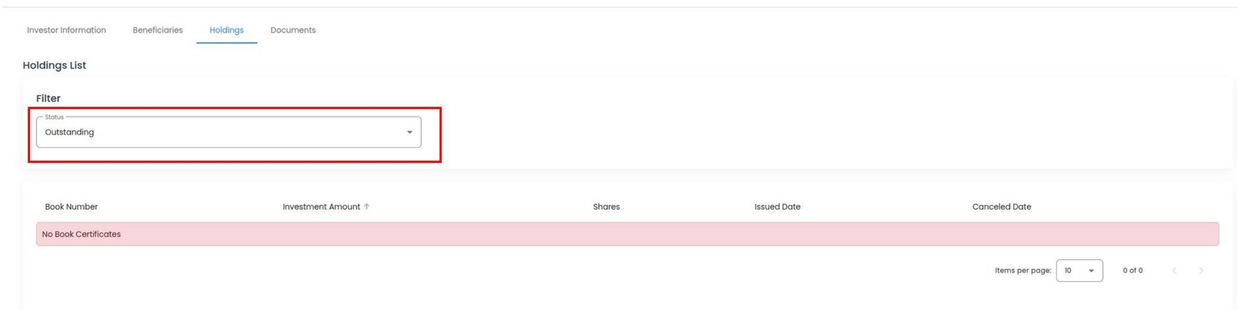


Fig. 44: Account, Investors, Investor Information, Holdings Tab, Status Filter Dropdown

2. Select the status you want to filter by.

Available Statuses

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

- Oustanding & Canceled
- Outstanding
- Canceled

Action Complete

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

Documents List Tab

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

Contents

Location: Documents Tab

Fig. 45: Account, Investors, Investor Information, Documents Tab

Columns: Documents List Table

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

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

Search for Documents

1. Place cursor in search field.
2. Start typing the name of the **File Name** you want to search for.

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

Fig. 47: Account, Investors, Investor Information, Documents Tab, Search Location

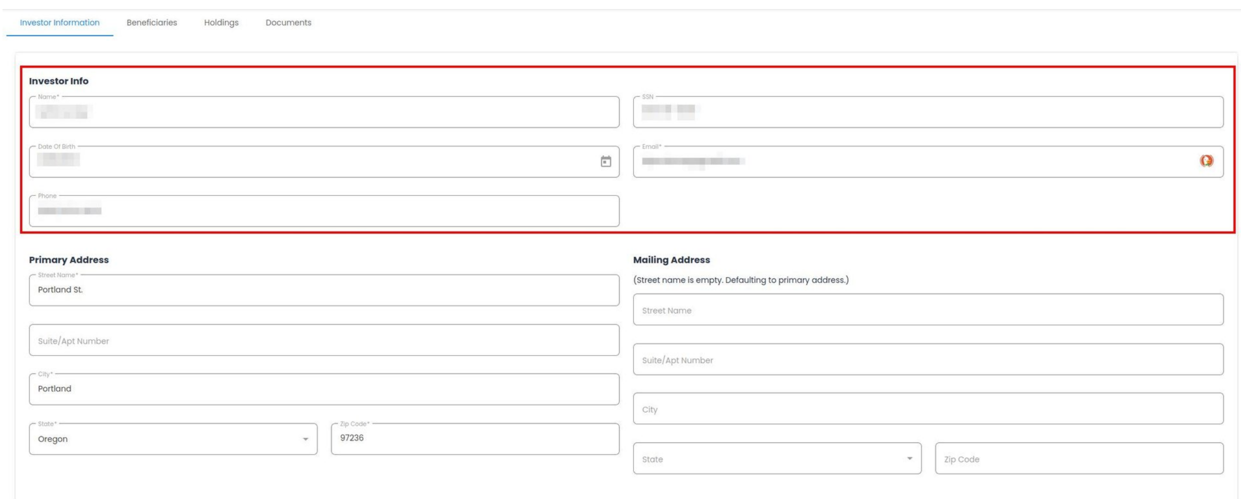


Fig. 48: Account, Investors, Investor Information, Documents Tab, Search Results

Other Actions

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

Available Actions

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

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

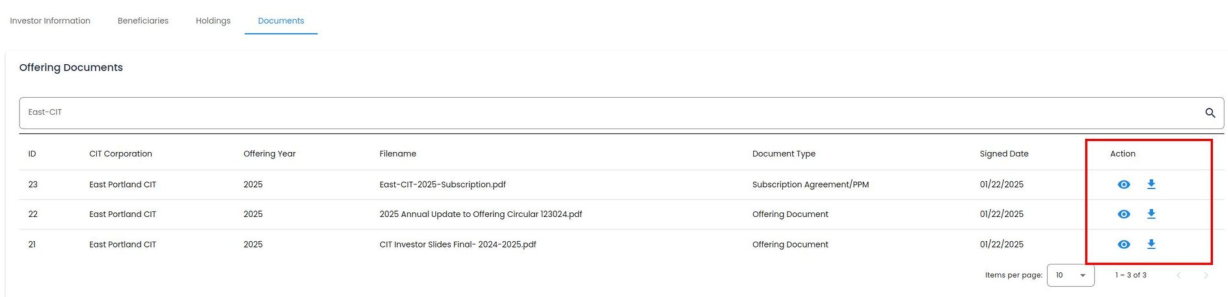


Fig. 49: Account, Investors, Investor Information, Documents Tab, Action Column Location

I.6 Document

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

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

CIT Corporation Onboarding Documents

Table of Contents

Features: CIT Corporation Onboarding

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

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

- *Quickly view important information about each CIT Corporation*
- *Access indepth company details*
- *Approve or reject onboarding documents*

Note

See Approve or reject onboarding documents for more information.

- *Filter by Onboarding Status* (i.e., **All**, **Pending**, or **Completed**)
- *View document completion status*

Location: CIT Corporation Onboarding

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

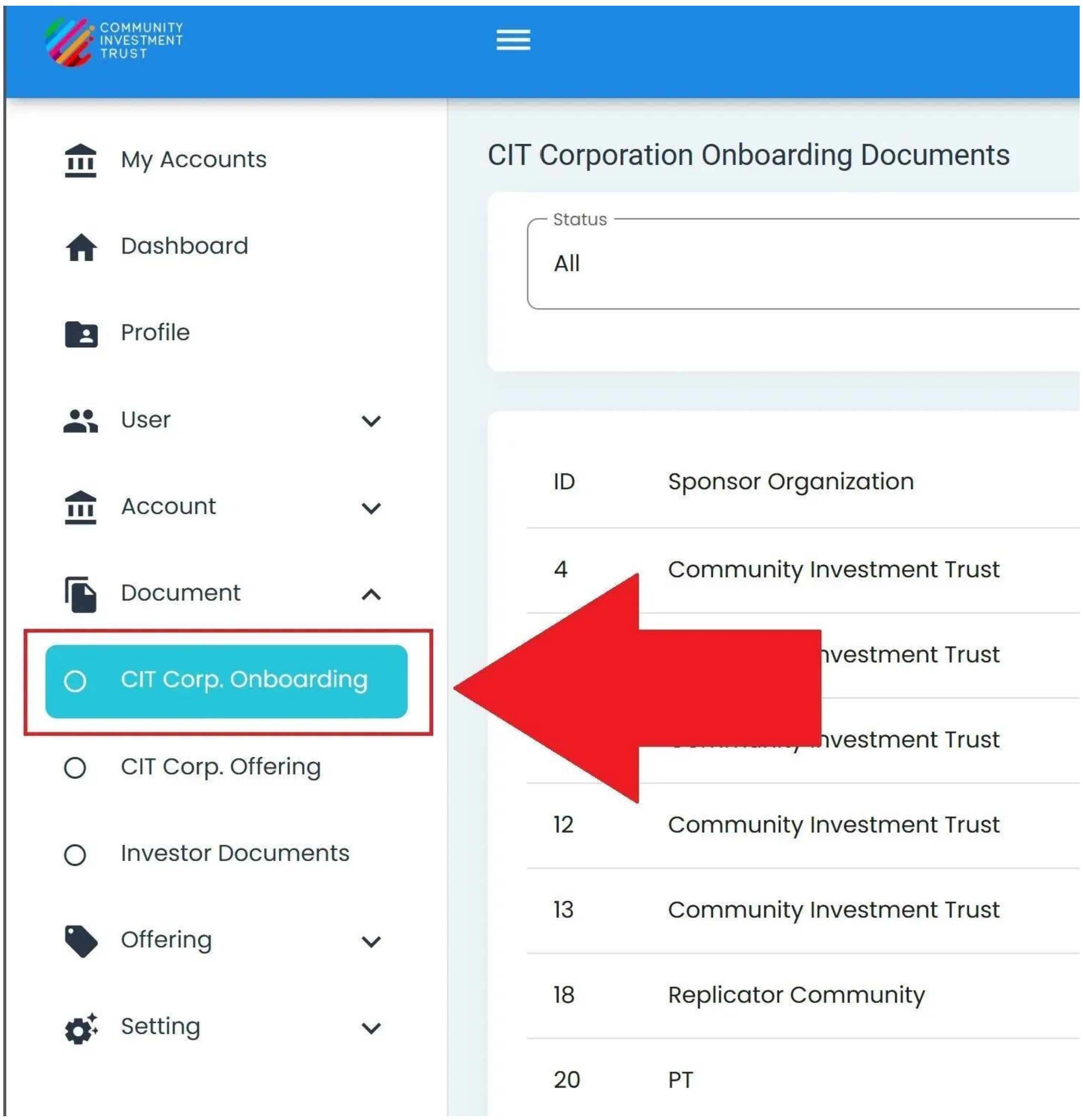
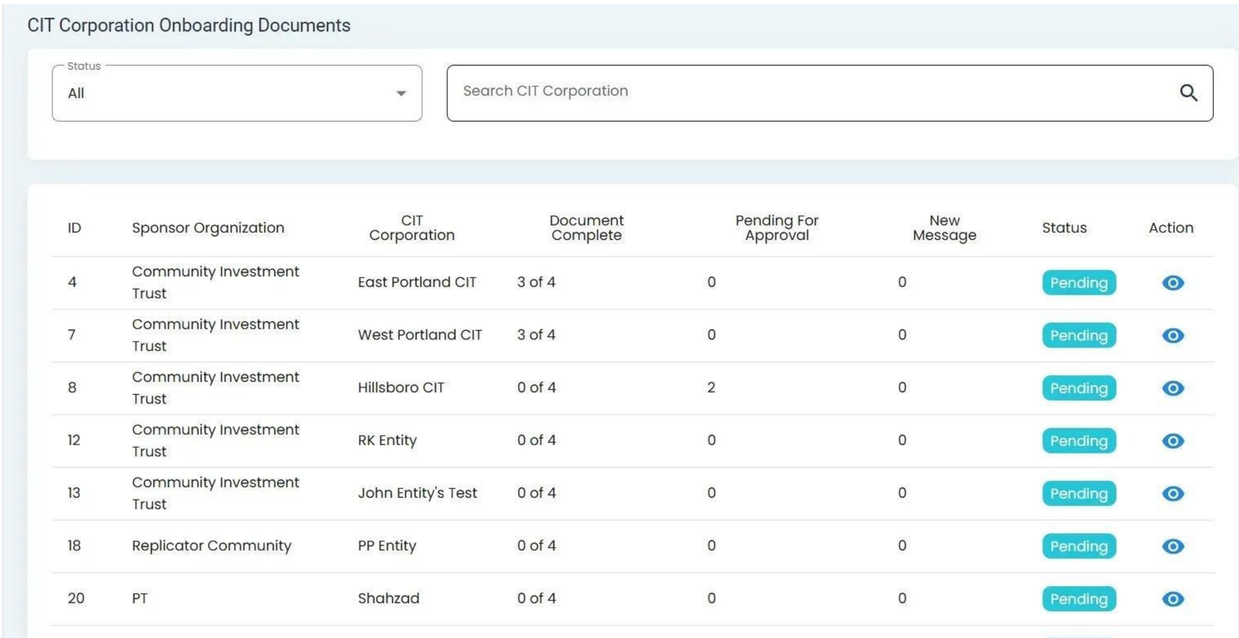


Fig. 50: CIT Corporation Onboarding, Location

Table: Onboarding Documents List

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


CIT Corporation Onboarding Documents

Status: All

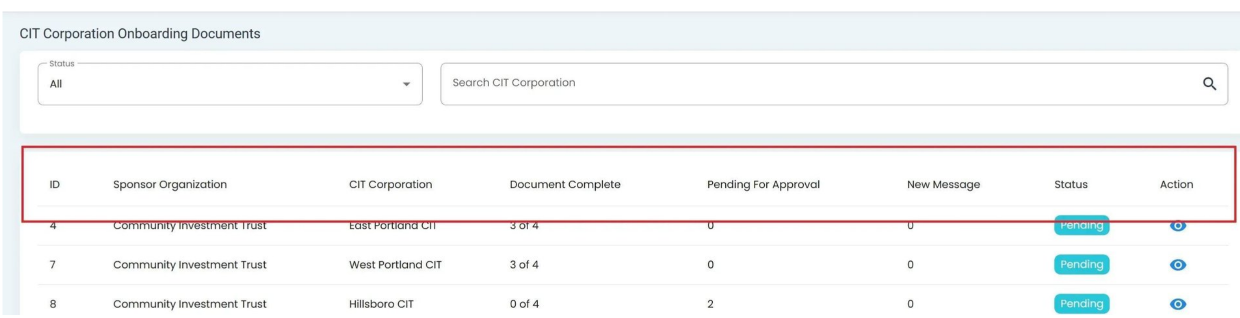
Search CIT Corporation

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

Fig. 51: CIT Corporation Onboarding Section, Homepage, Onboarding Documents Table

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

CIT Onboarding Documents Table: Columns Explained


CIT Corporation Onboarding Documents

Status: All

Search CIT Corporation

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

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

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

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

- **Sponsorship Organization** column The **Sponsorship Organization** that is sponsoring the onboarding process.

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

Column Sorting

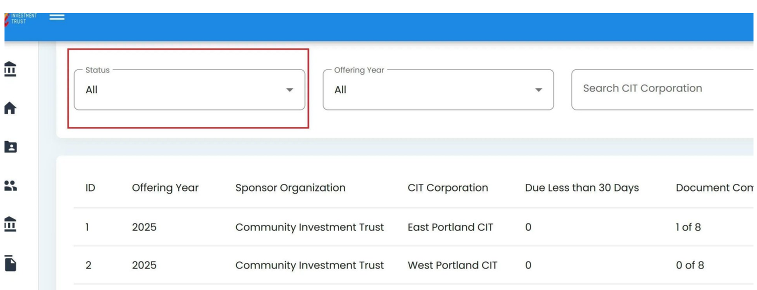
Sort columns by Descending or Ascending by clicking on column name.

Status Filters for Onboarding Documents Table

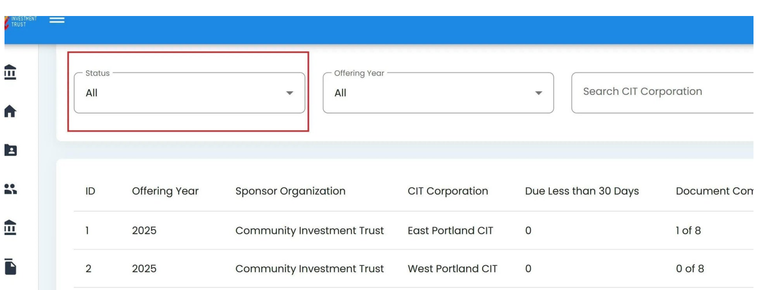
The table can be filtered by the following Statuses:

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

1. Find and select the Status dropdown.



2. Select the desired status from the dropdown.



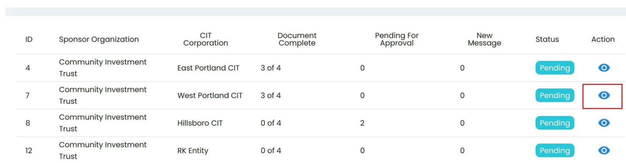
Note

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

Action: View More Details

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

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



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

Action Complete

This action will take you to the *Offering Document Details* page.

Onboarding Document Details Page

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

Available Information

On this page, you can:

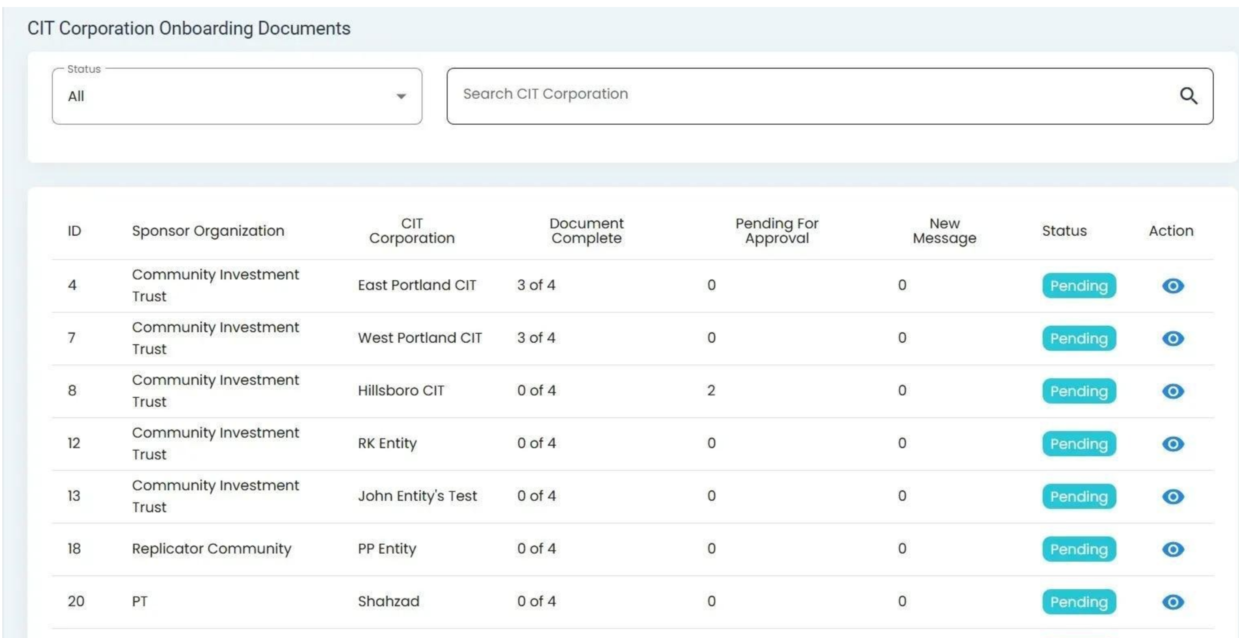
- View the status of each required document
- Access document submission history
- Review any messages or notes associated with the onboarding process
- See deadlines for document submissions

Onboarding Documents Table

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

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

- *Column Explanation*
- *Status Filter*
- *View More Details*



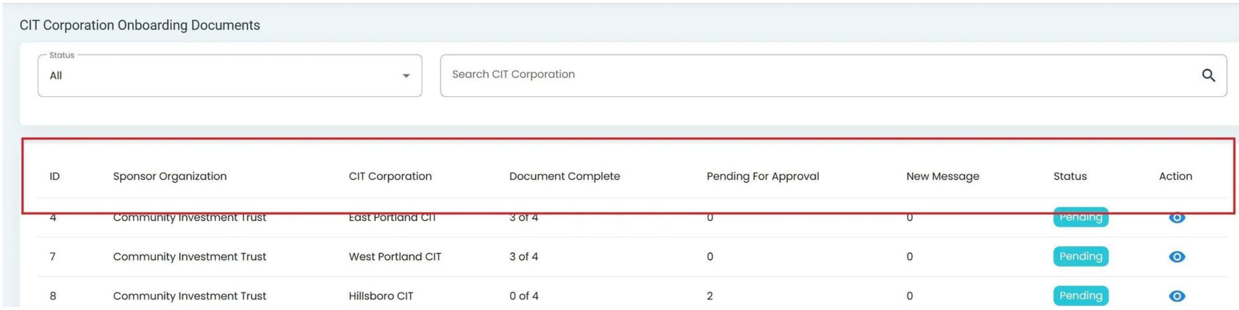
CIT Corporation Onboarding Documents

Status: All

Search CIT Corporation

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

CIT Onboarding Documents Table: Columns Explained



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

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

Note

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

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

Column Sorting

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

CIT Corporation Offering

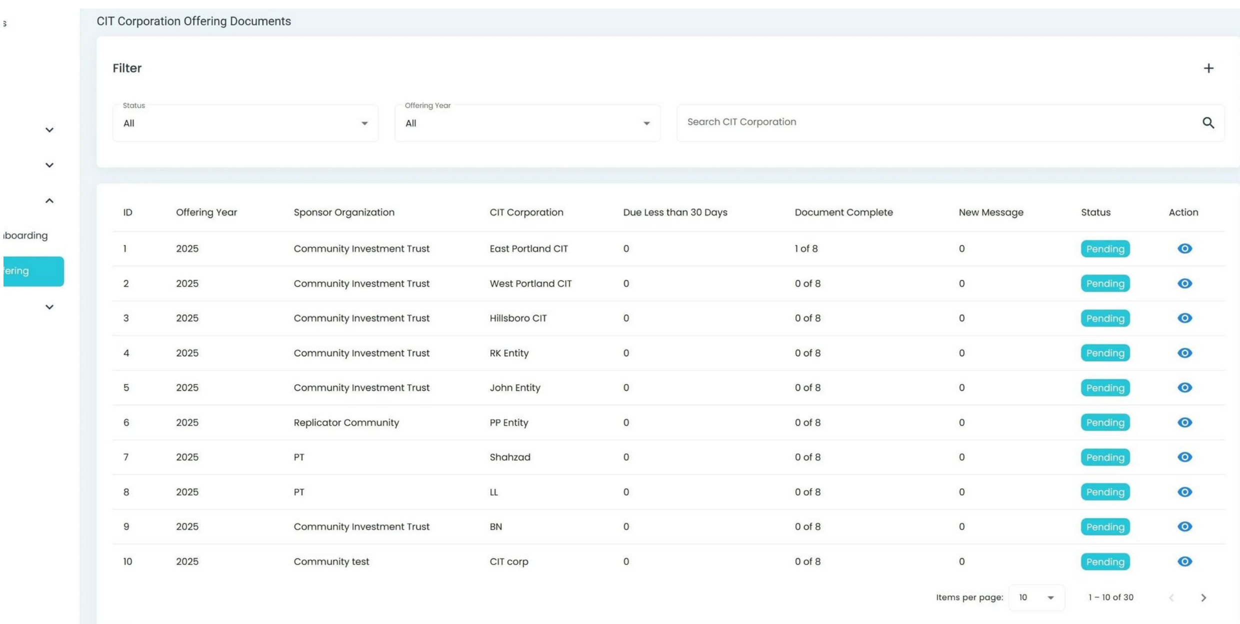
Table of Contents

Features: CIT Corporation Offering

The **CIT Corp Offering** section helps you track the progress of every offering made by CIT Corporations.

This section also allows you to:

- *Quickly view important information about each offering*
- *Access indepth offering details*
- *Filter by Offering Status* (i.e., **All**, **Pending**, or **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. 52: CIT Corporation Offering Homepage

Offering Documents Table

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

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

> **Need More Information?**
>
> For more details on specific features, see the sections above.

CIT Offering Documents Table: Columns Explained

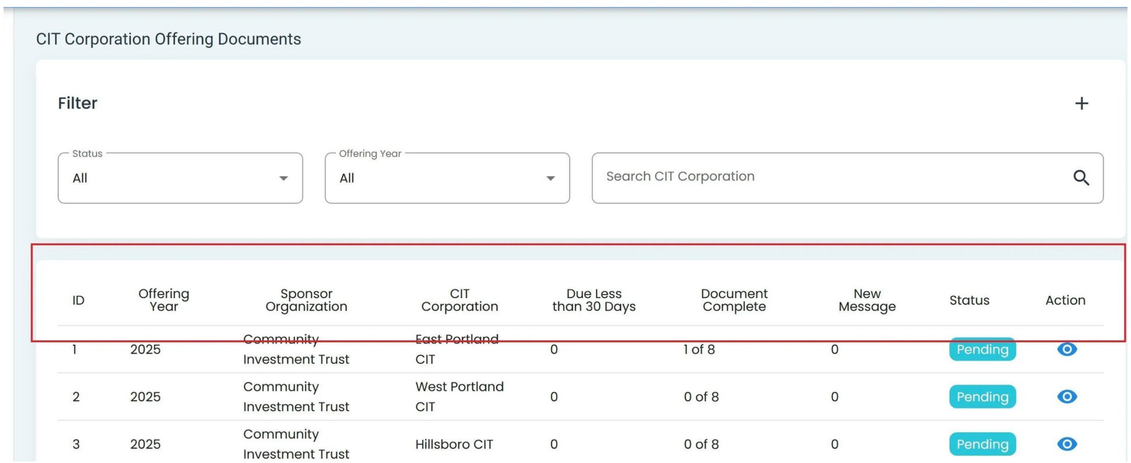


Fig. 53: CIT Offering Documents Table Columns

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

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

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

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

– View More Details : Action to view more details about the documents and where they are at on the offering process for the selected CIT Corporation.

Column Sorting

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

CIT Offering Status Filter

Status Filter Options

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

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

How to Filter by Status

1. Find and select the Status dropdown.

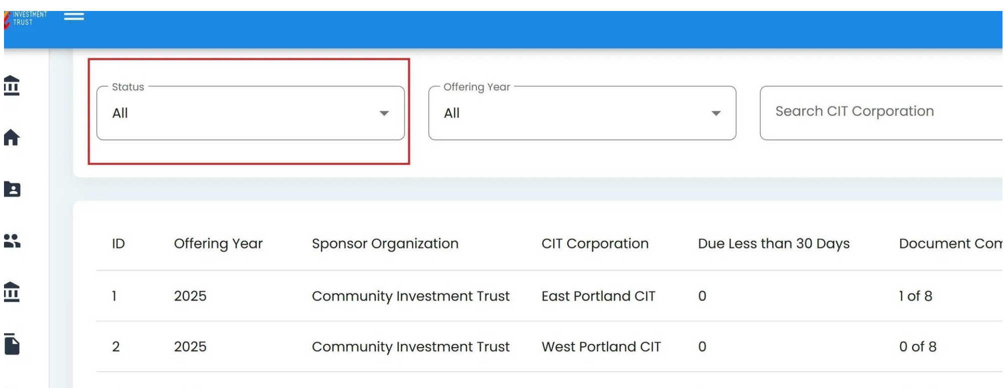


Fig. 54: Status Filter Location

2. Select the desired status from the dropdown.

Action Complete

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

Status Types

Status Types

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

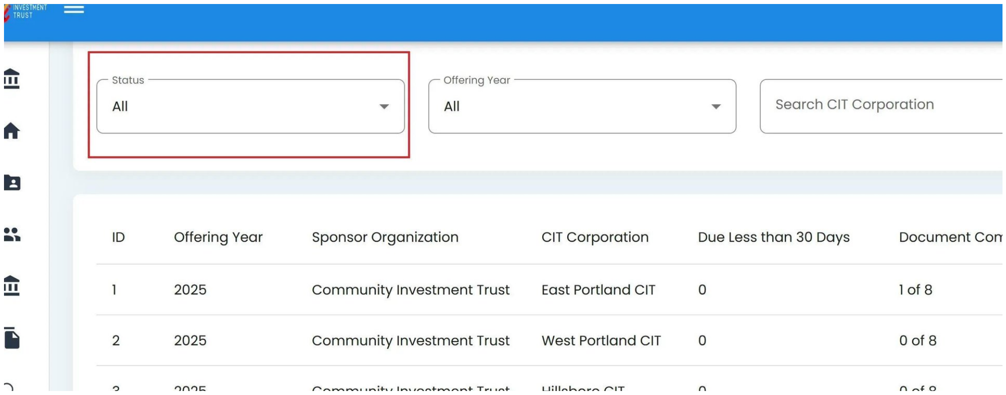


Fig. 55: Status Dropdown Options

ments

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.

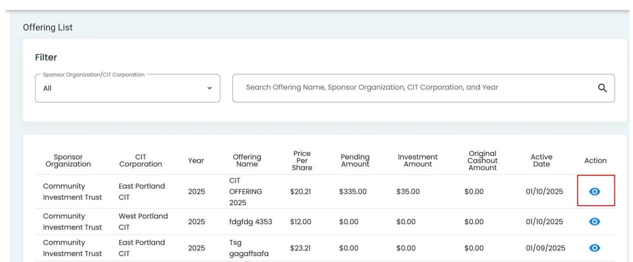


Fig. 56: View More Details Icon Location

Action Complete

This action will take you to the *Offering Document Details* page.

Offering Document Details Page

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

Available Information

On this page, you can:

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

Investor Documents

The `Investor Documents Page` allows you to quickly:

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

This section also allows you to:

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

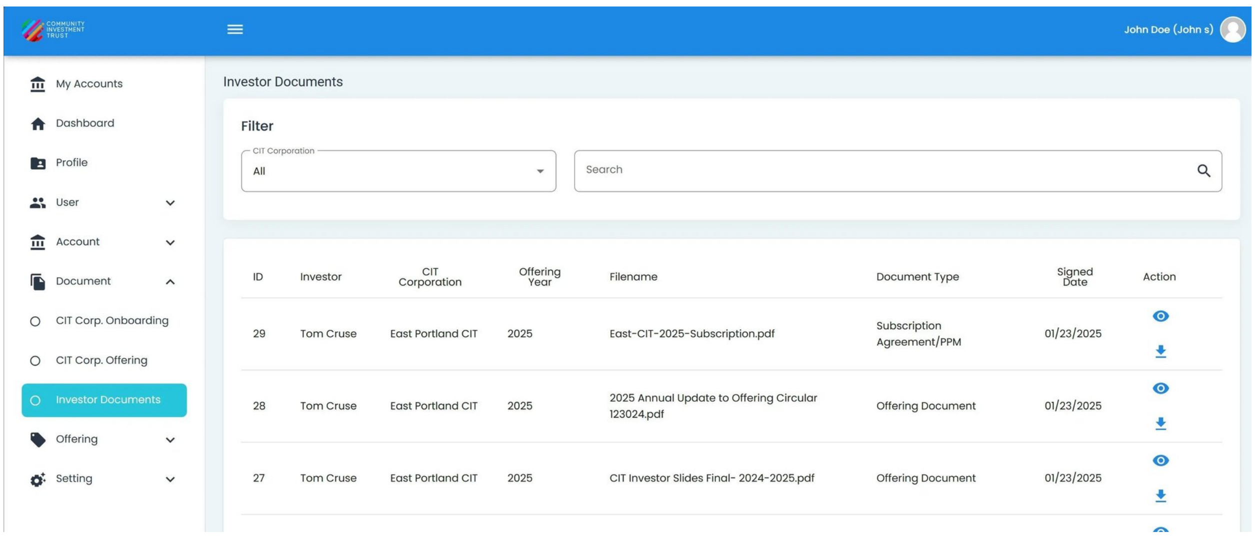
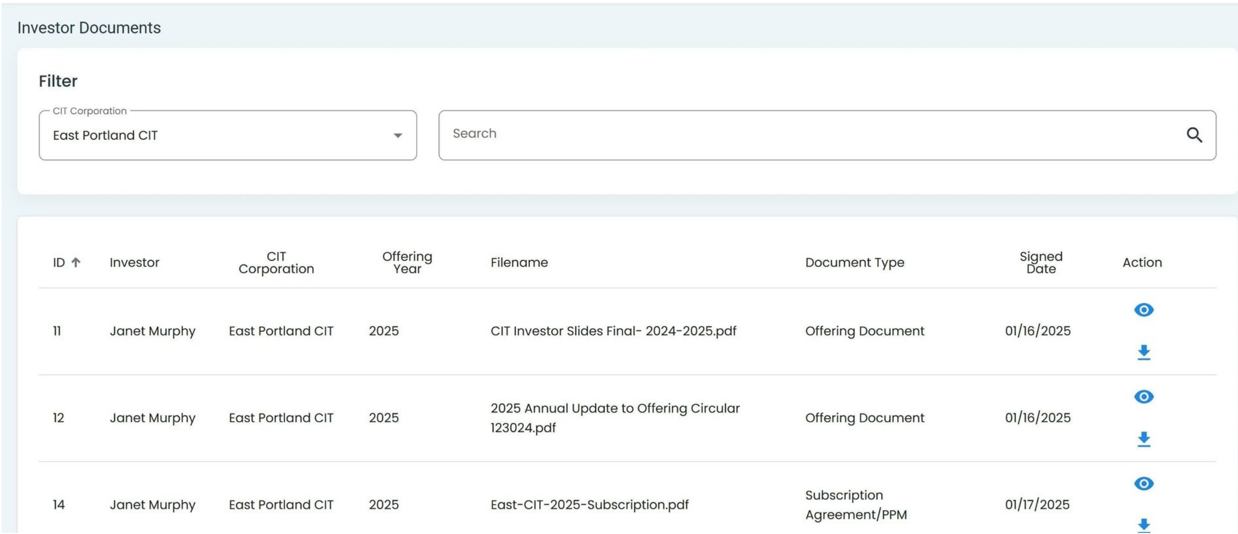


Fig. 57: Investor Documents, Homepage and Location

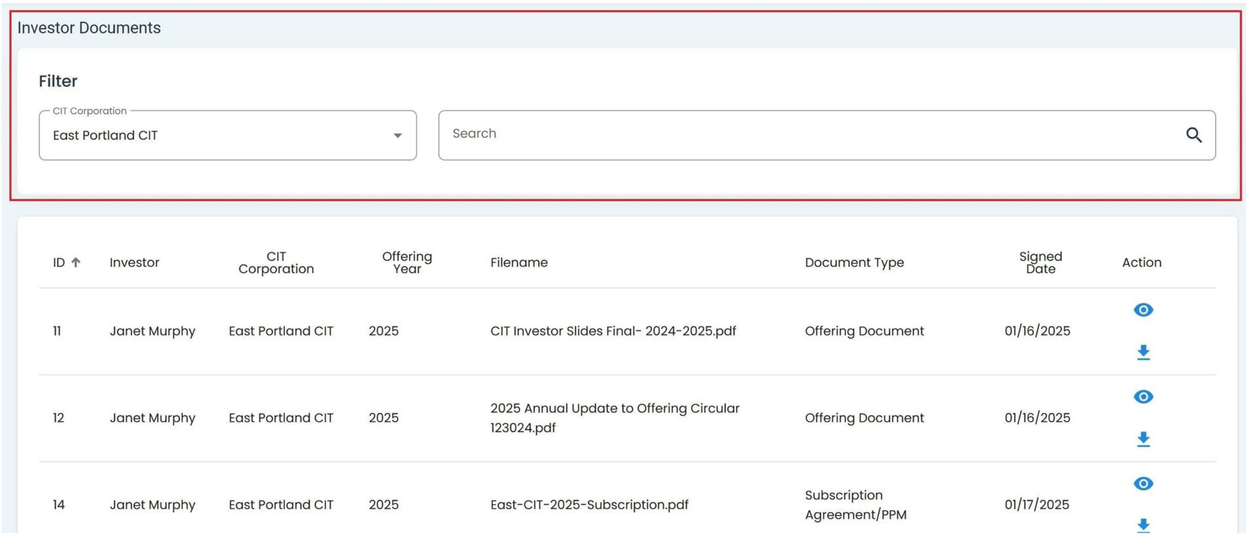
Table: Investor Documents

The **Investor Documents Table** is the primary interface for accessing investorrelated files:



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

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

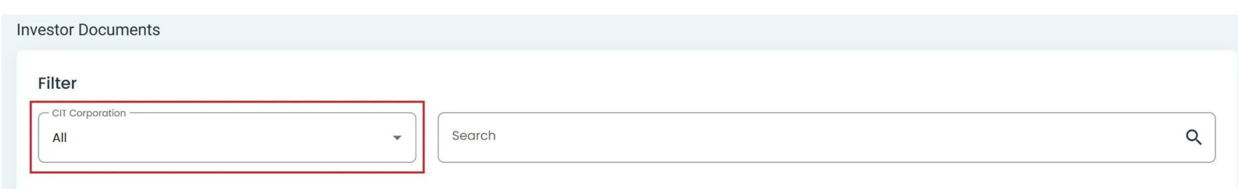
Column Sorting

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

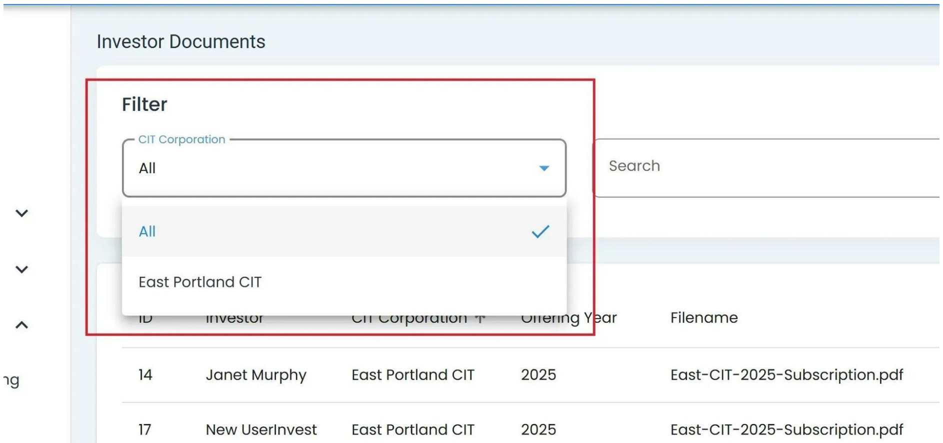
Filter by CIT Corporation

You can filter the table by the CIT Corporation:

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



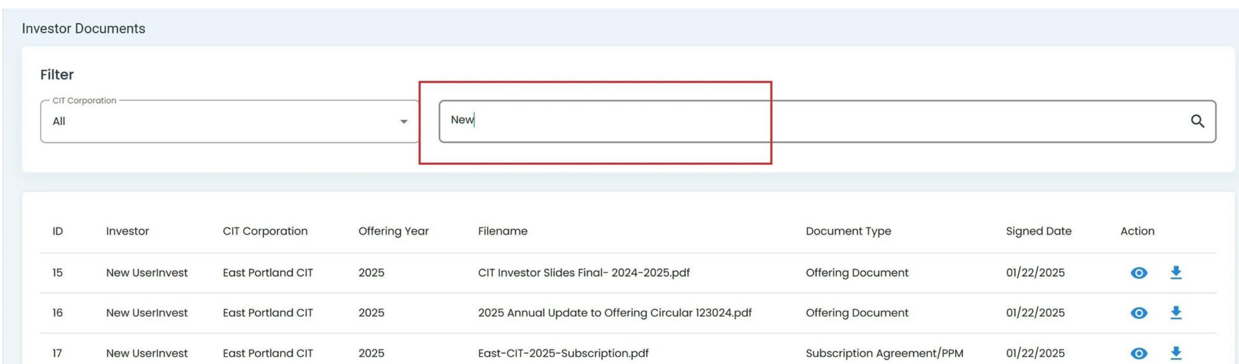
2. Select the desired CIT Corporation or **All** from the dropdown.



How tp Search Investor Documents

To search for a specific document or investor:

1. Find the **Search** bar.



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

Actions: View Details and Download

Each row provides two actions:

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

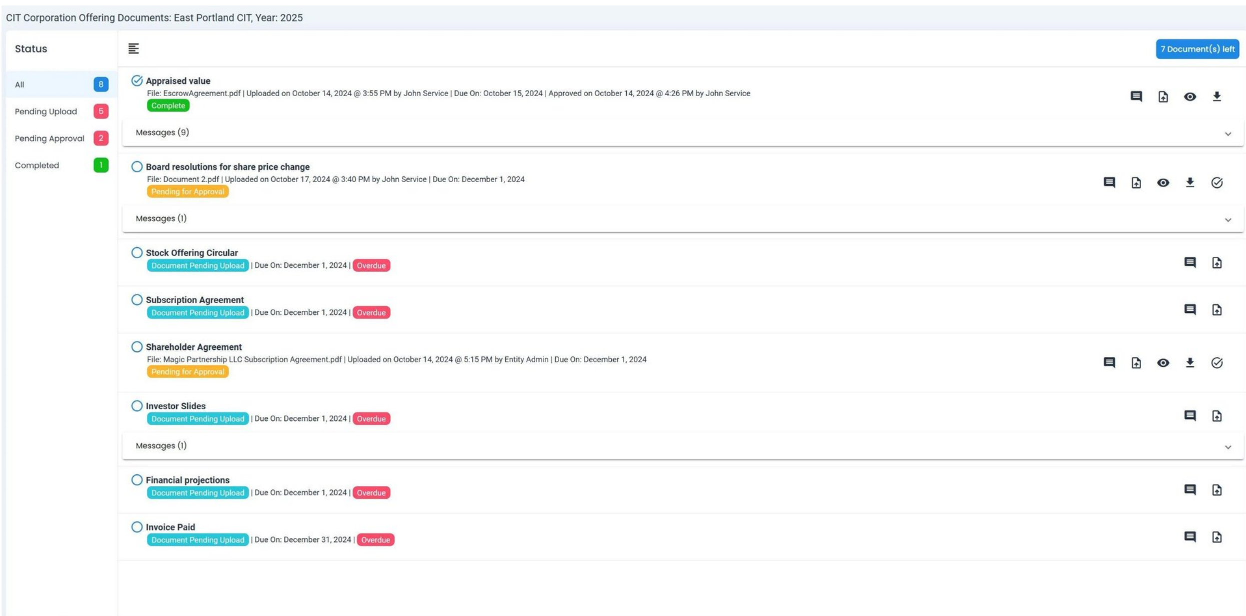
~~~~
- **Download**:
    1. Click the ``download icon`` to start downloading the document.

```{only} html
```{lazyfigure} /_static/sponsor_app/Document/icons/download-document-icon.jpg
:width: 50%
:align: center
~~~~

View More Details: Documents

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

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



> **Looking for an Overview?**
>
> See citcorporationonboardingpage or citcorporationofferingsection

Layout Explanation

View Details: Tabs Explained

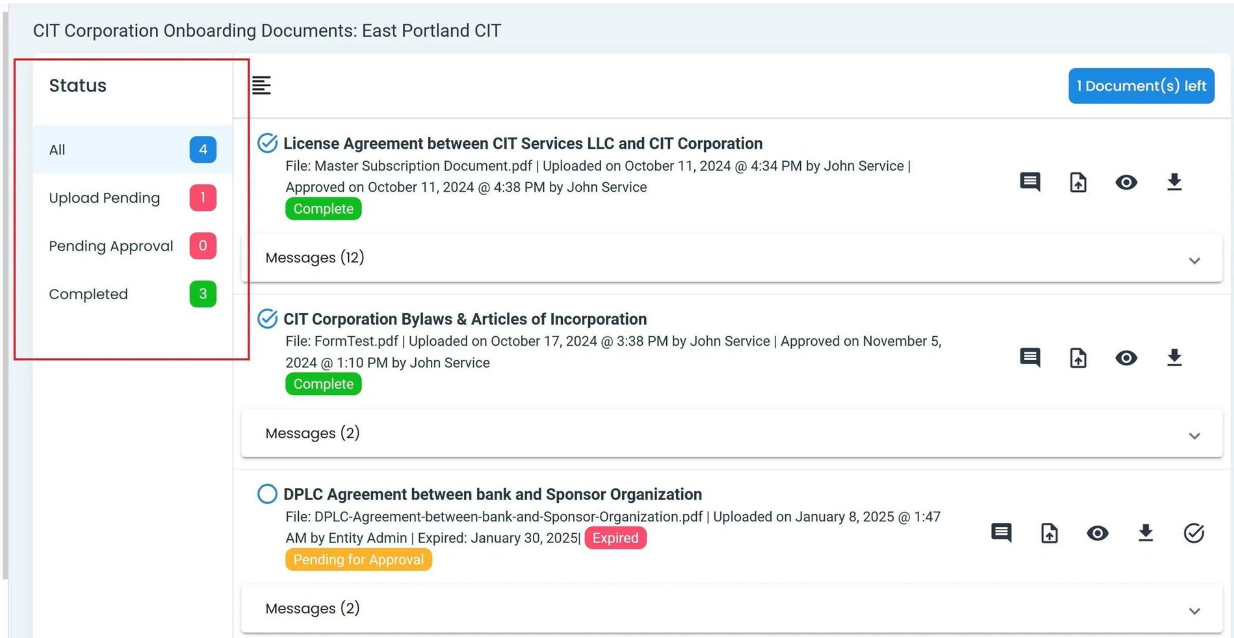
The detailed view of the **Documents** page contains 4 tabs to sort through:

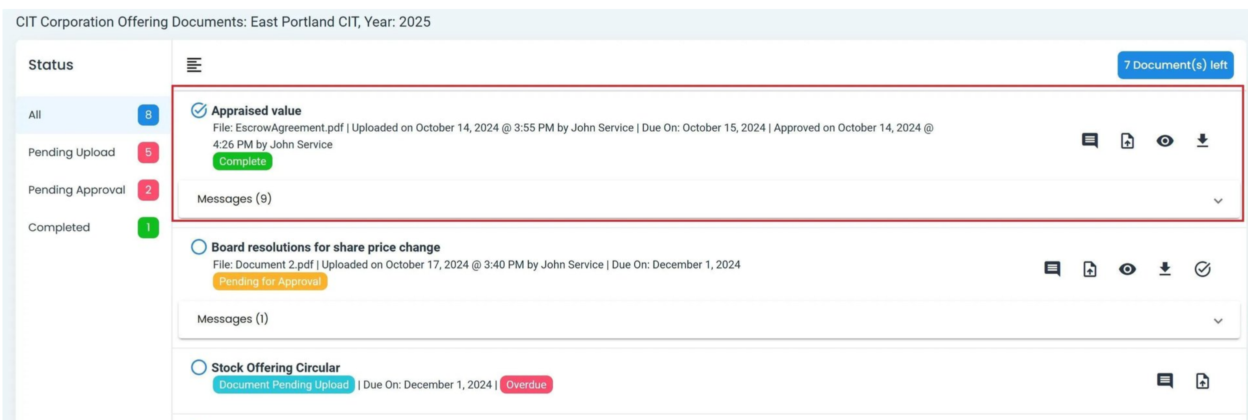
- All All documents, regardless of status.
- Upload Pending Documents awaiting upload.
- Pending Approval Documents awaiting approval.
- Completed Documents fully approved and completed.

View Details: Cards Explained

Each card will display information about a document, including:

- File Name
- File Type
- Date and Time Uploaded





- Uploaded By
- Status
- (If Applicable) Approved By
- Messages

Available Actions

Each Status has its own set of available actions:

- All Status
- Upload Pending Status
- Pending Approval Status

I.7 Offering

The following **Sections** are included in the ▷ **Offering** category:

- *Offerings*
- *Enrollments*

Offerings

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

Table of Contents

Location: Offerings

To Find the Offerings List Homepage:

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

   Don't see the sidenav?

   See *How to Toggle Primary Sidebar* for more information.

2. Select the dropdown for the ▷ **Offering** category.
3. Select **Offerings** from the dropdown.

Table: Offerings List

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

Columns: Offerings List Table

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

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

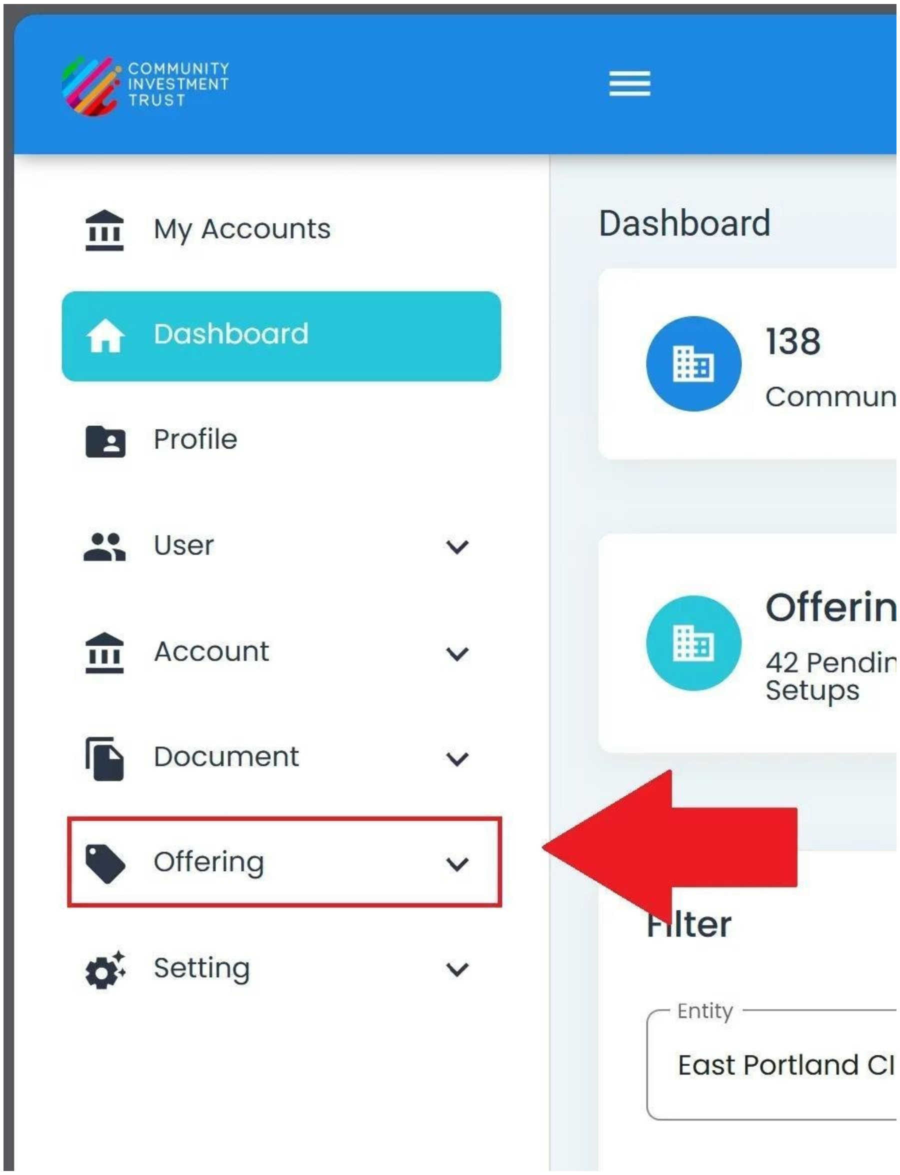


Fig. 58: Offering, Offerings Primary Sidenav Dropdown Location

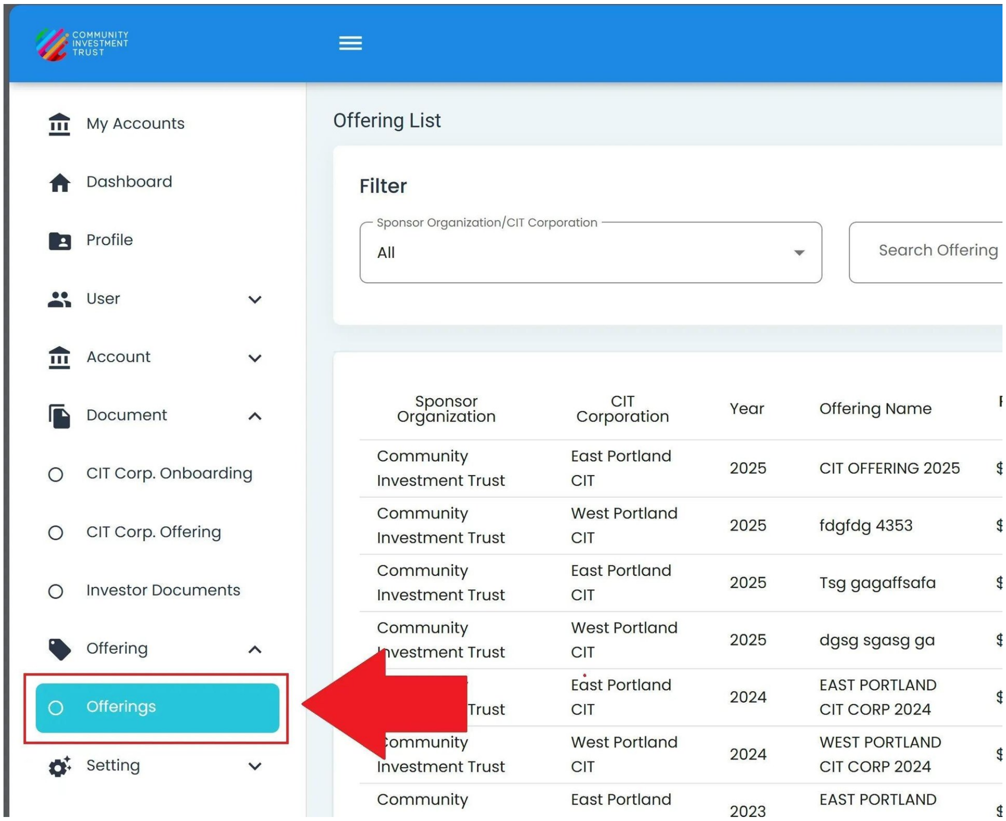


Fig. 59: Offering, Offerings Homepage

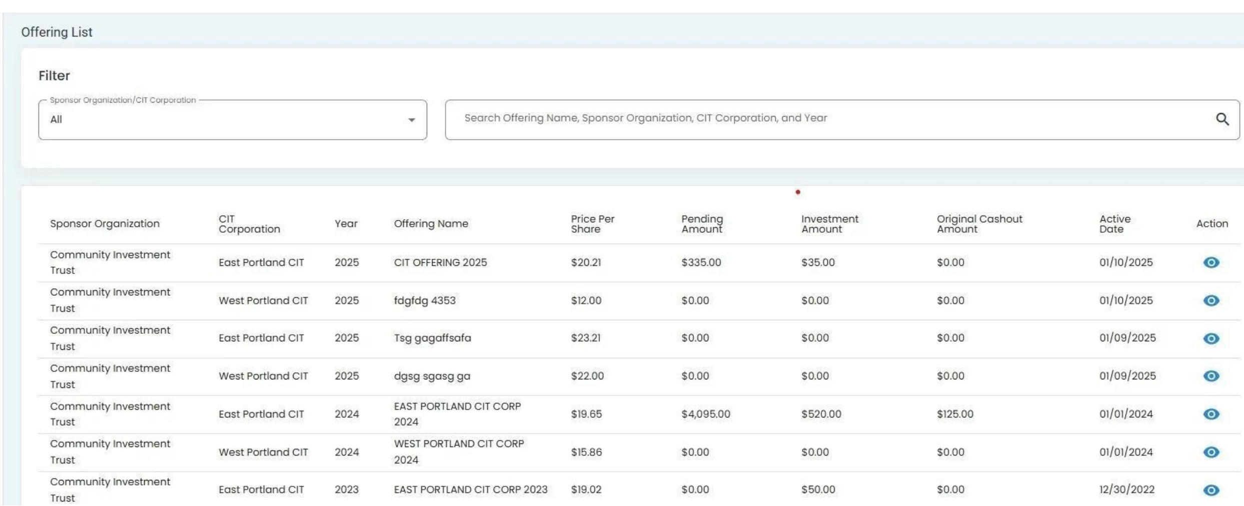


Fig. 60: Offering, Offerings Homepage, Offerings List table

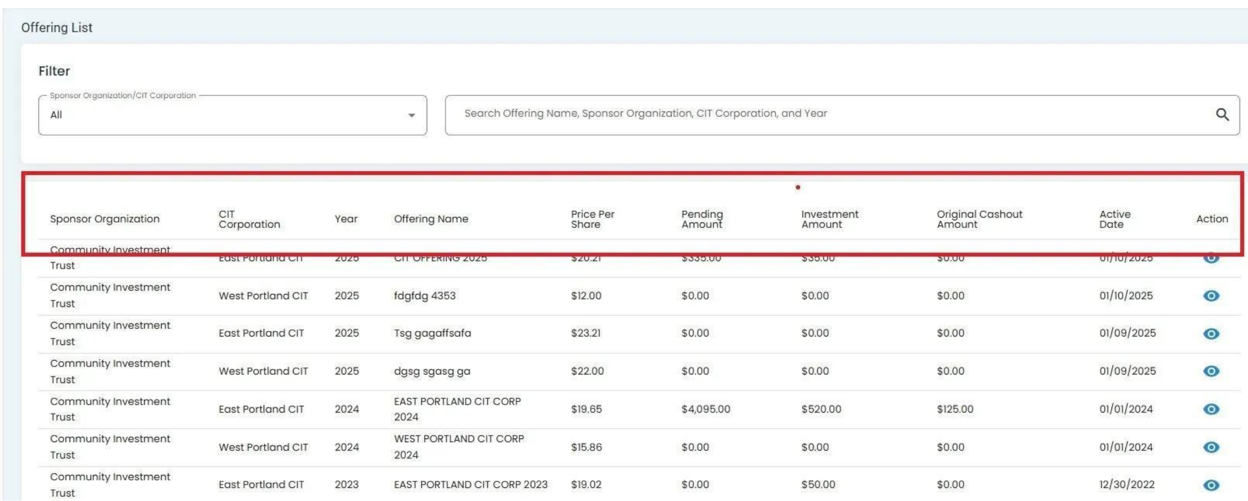


Fig. 61: Offering, Offerings Homepage, Offerings List table

Enrollments

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

Contents

Enrollments Homepage Location

To Find the Enrollments List Homepage:

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

   Don't see the sidenav?

   See *How to Toggle Primary Sidebar* for more information.

2. Select the dropdown for the ▷ **Offering** category.

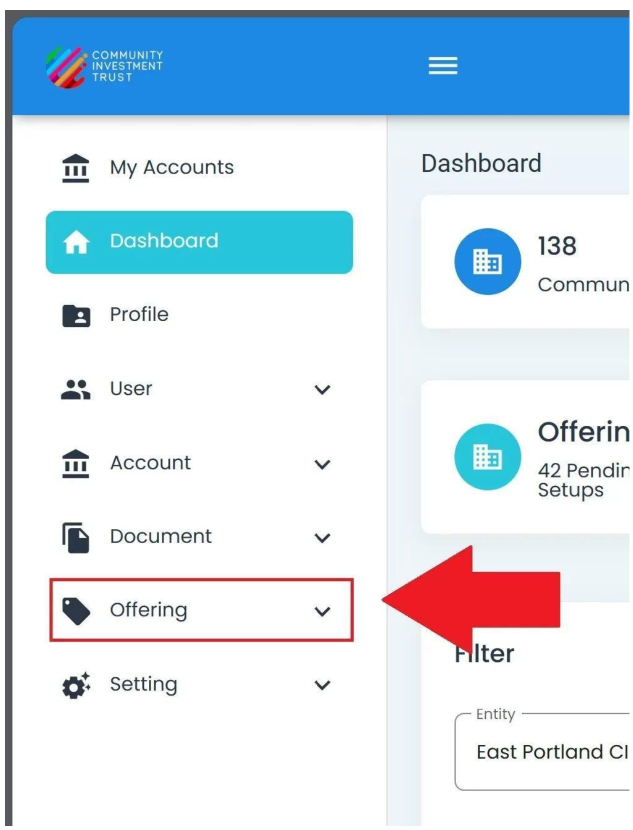


Fig. 62: Offering, Enrollments Primary Sidenav Location

3. Select **Enrollments** from the dropdown.

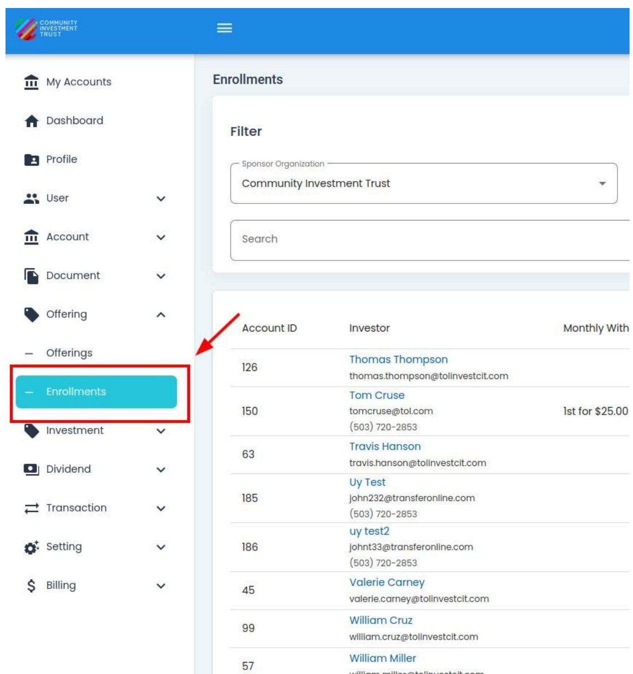


Fig. 63: Offering, Enrollments Homepage

Related Sections

- See the *Enrollments Table* for more information on the Enrollments Table Columns
- See the *Enrollments Search* for more information on how to search for Investors in the **Enrollments** table.

Enrollments Table

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

Contents

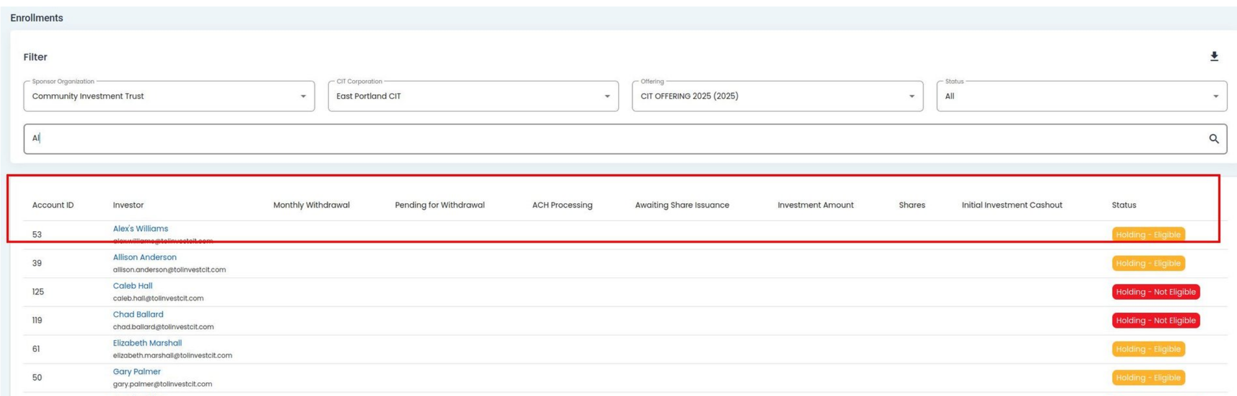


Fig. 64: Offering, Enrollments, Enrollments Table, Columns Explained

Columns: Enrollments Table

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

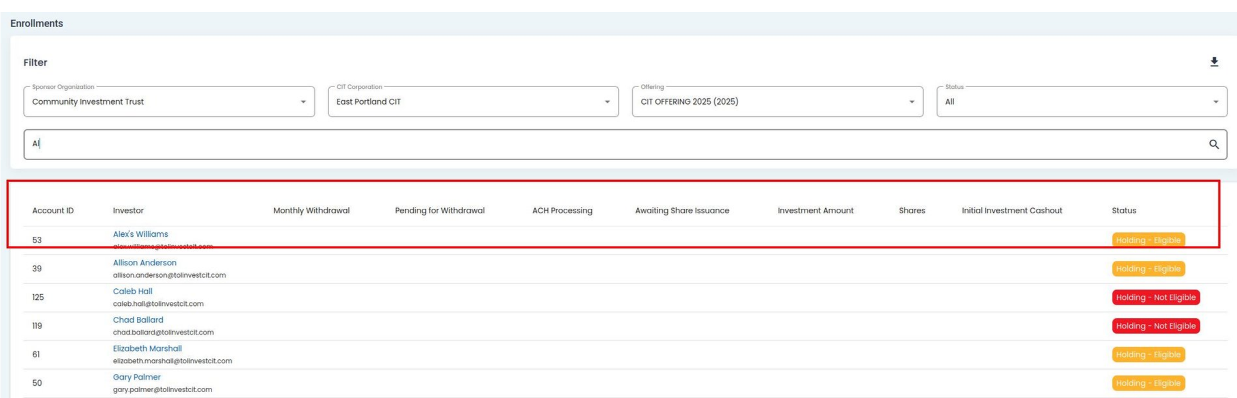


Fig. 65: Offering, Enrollments, Enrollments Table, Columns

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

- **Account ID**
- **Investor**

Available Enrollment Statuses

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

- All
- Test Account
- Active
- In Process
- Stop Investment
- Cashout
- Reference to ACH Failed item ACH Failed
- Holding (both Elgible and Reference to Not Eligible item Not Eligible)
- Admin Stop

Using Enrollments Filters

To Filter Enrollments:

1. Find the `Sponsor Organization` dropdown.

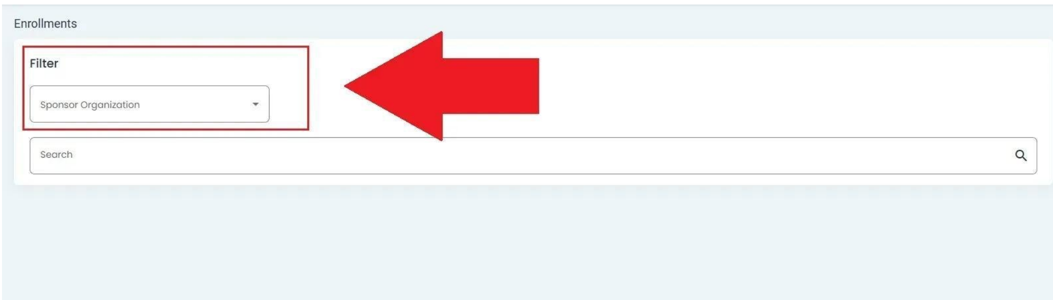


Fig. 66: Offering, Enrollments, Sponsor Organization Filter Location

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

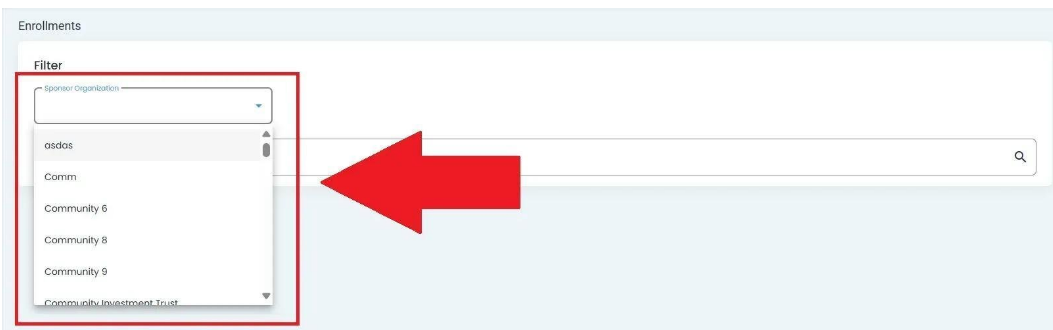


Fig. 67: Offering, Enrollments, Filter Dropdown Options

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

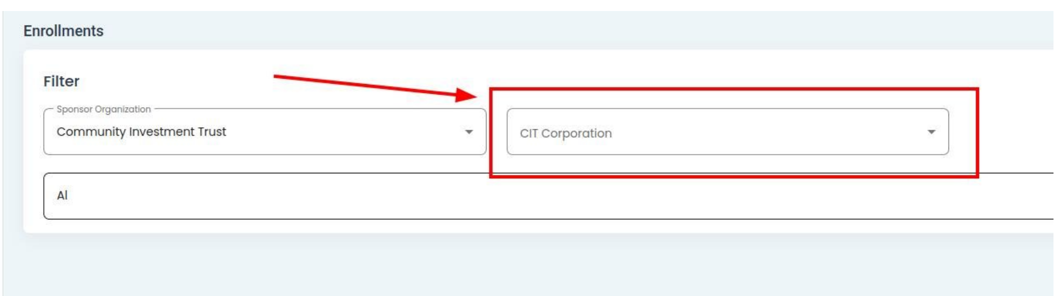


Fig. 68: Offering, Enrollments, Filter Selection Results With Two Dropdowns

Note

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

Warning: this feature is currently in development

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

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

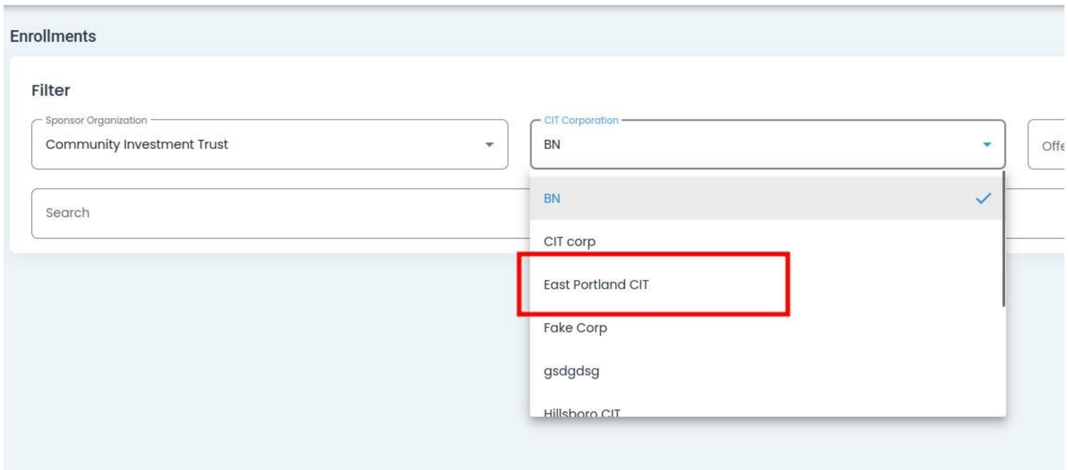


Fig. 69: Offering, Enrollments, CIT Corporation Filter Selection

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

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

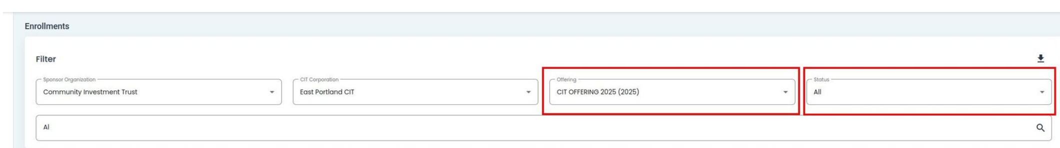


Fig. 70: Offering, Enrollments, Offering and Status Dropdowns Appear

4. Select the Offering

1. Find and `Select` the **Offering** dropdown.

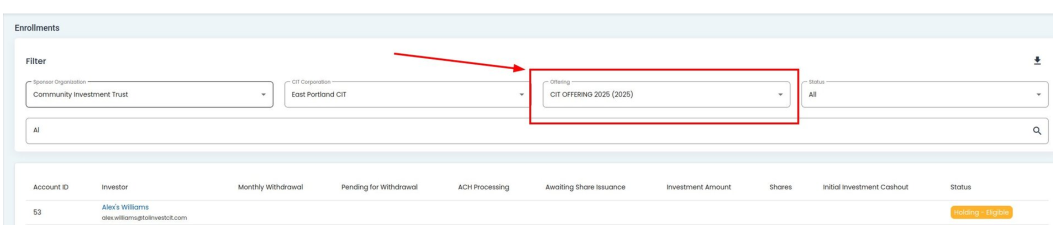


Fig. 71: Offering, Enrollments, Offering Dropdown Location

2. `Select` an offering from the offering dropdown.

Fig. 72: Offering, Enrollments, Offering Dropdown Selection

5. Select the Status

1. Find and `Select` the **Status** dropdown.

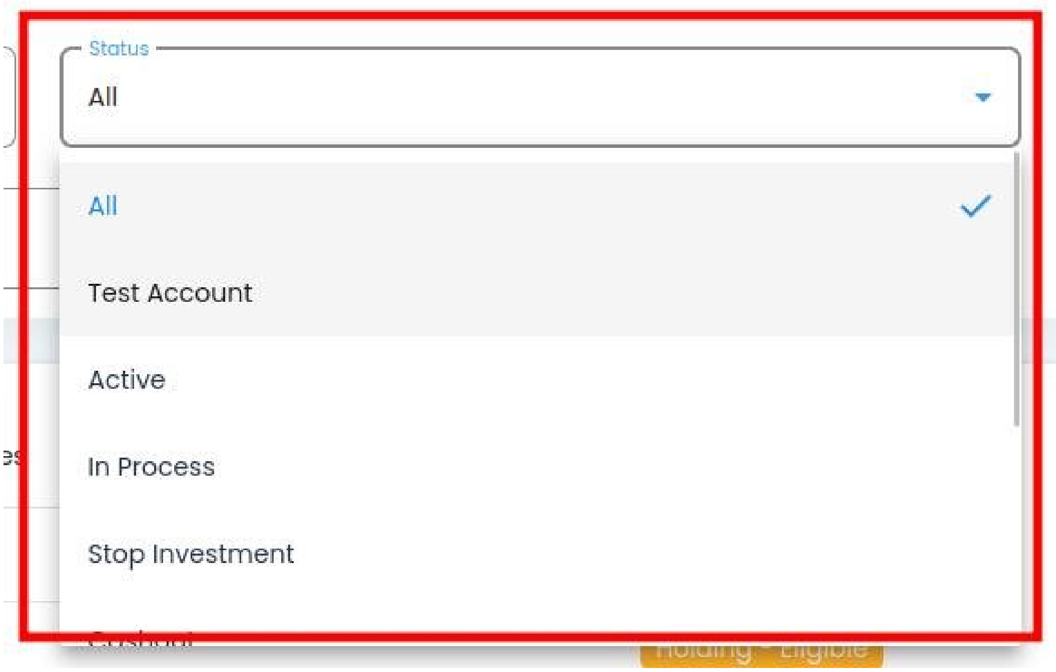


Fig. 73: Offering, Enrollments, Status Dropdown Location

2. `Select` a status from the status dropdown.

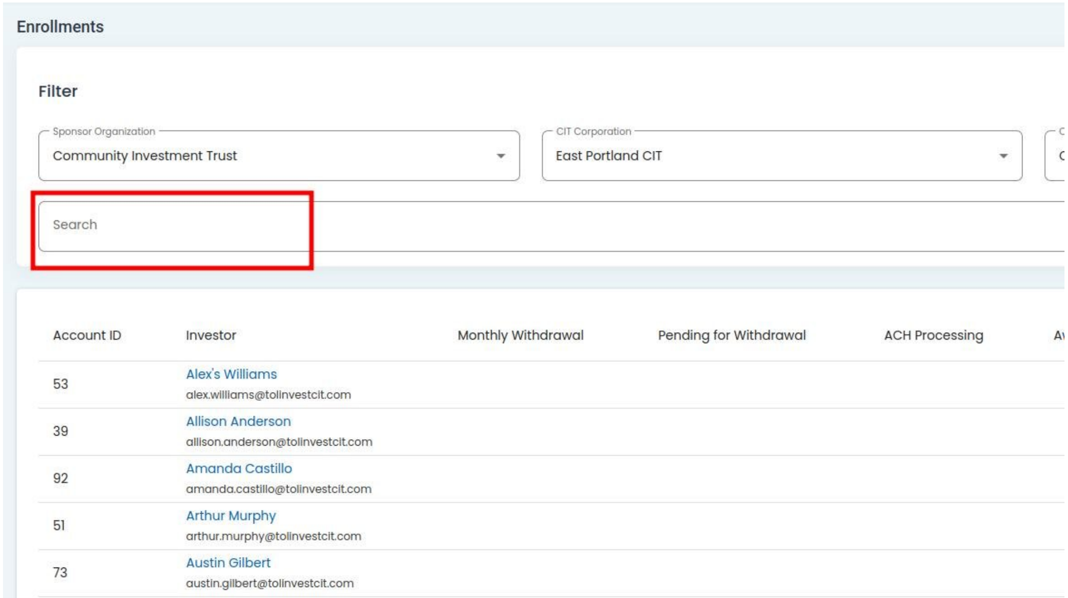


Fig. 74: Offering, Enrollments, Search Bar Location

Available Statuses

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

Using Enrollments Search

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

Using Filters for Enrollments Table

See *Using Enrollments Filters* for more information.

Possible Search Options: Enrollemnts Table

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

How To: Search for Investors

To Search for Investors:

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

   Search Results Automatically Populate

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

3. Click the **Investor** to view their *Investor Details*.

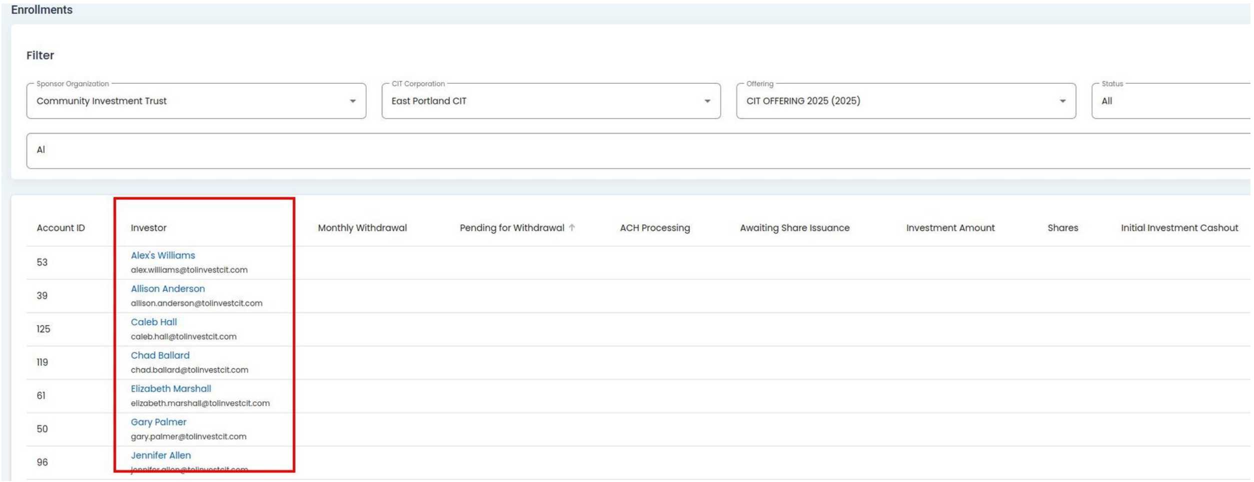


Fig. 75: Offering, Enrollments, Search Column Highlighted

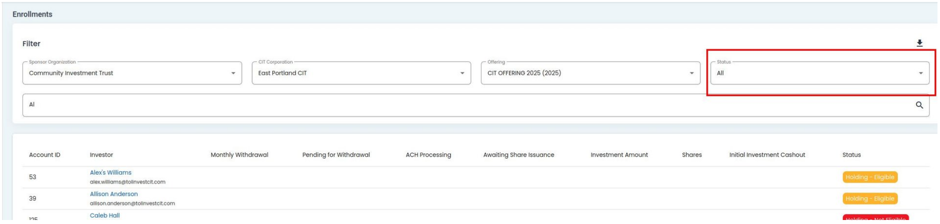


Fig. 76: Offering, Enrollments, Search Bar Location

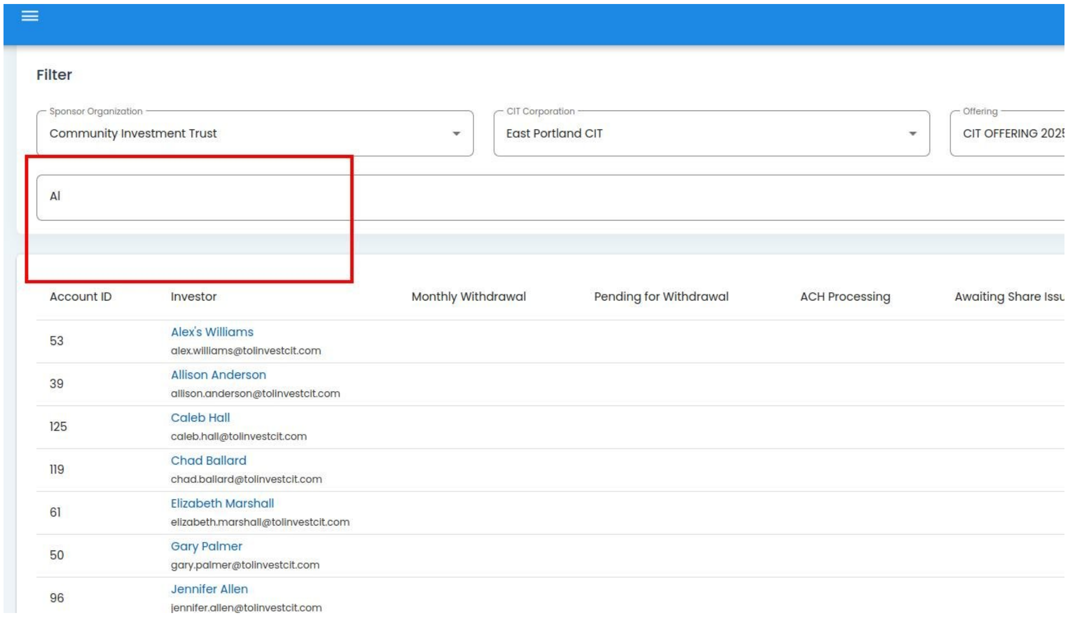


Fig. 77: Offering, Enrollments, Search Example, Name in Field

I.8 Investment

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

Contents

Investments Homepage Location

To Find the Investments List Homepage:

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

   Don't see the sidenav?

   See *How to Toggle Primary Sidebar* for more information.

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

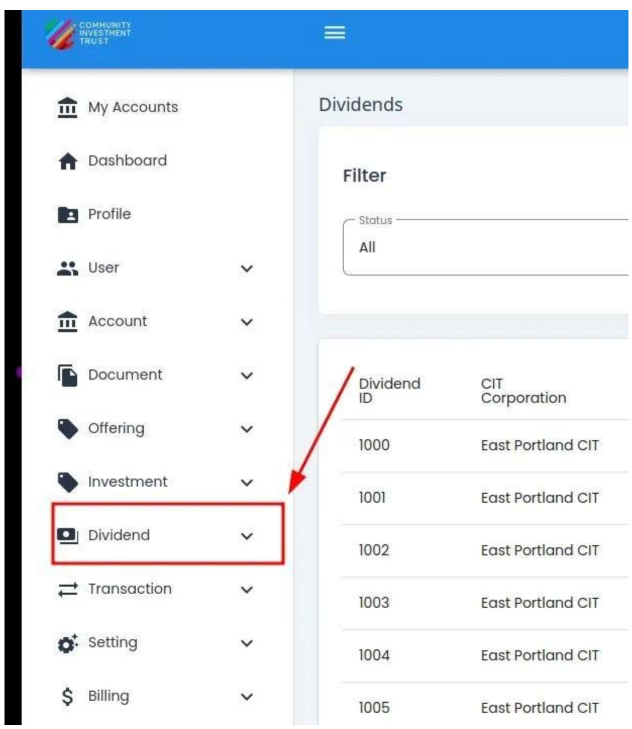


Fig. 78: Investment Category, Primary Sidenav Location

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

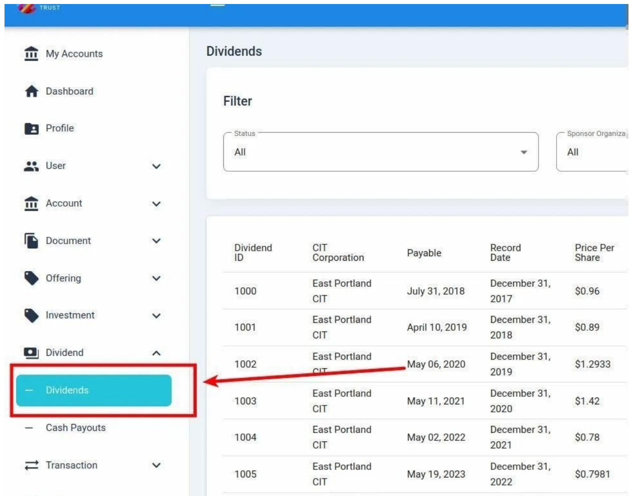


Fig. 79: Investment, Investments, Primary Sidenav Location

Investments List Table Overview

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

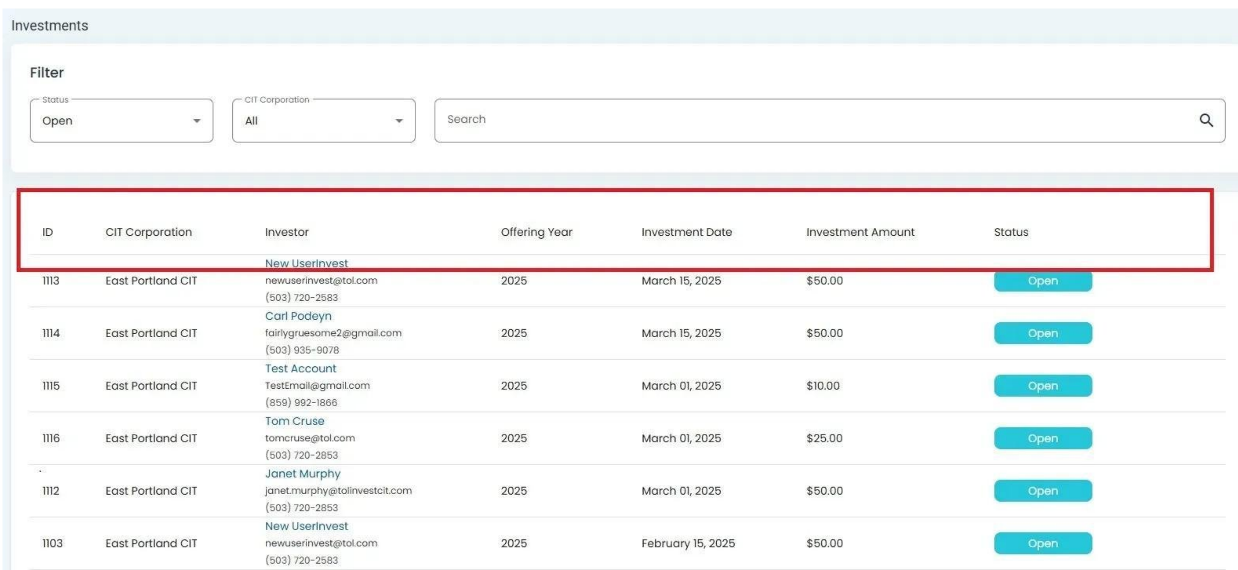


Fig. 80: Investment, Investments List Table

Using Investments Filters

To Filter Investments:

1. Locate the filter section at the top of the table.
2. Click on the Status dropdown to filter by status.

   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:

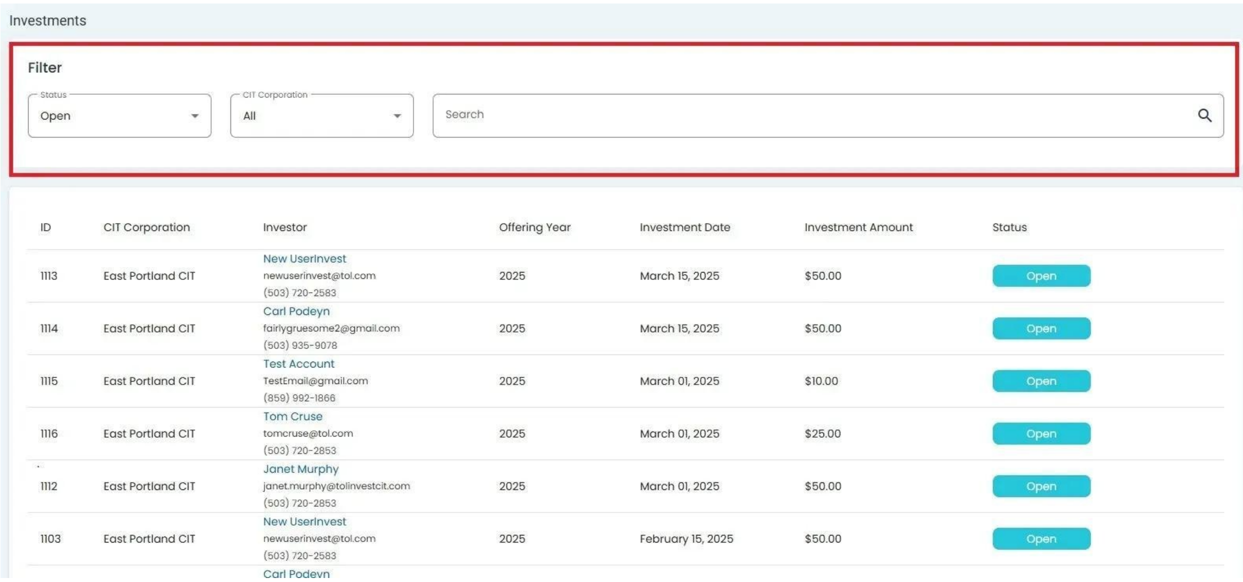


Fig. 81: Investments Table Filter Section Highlighted

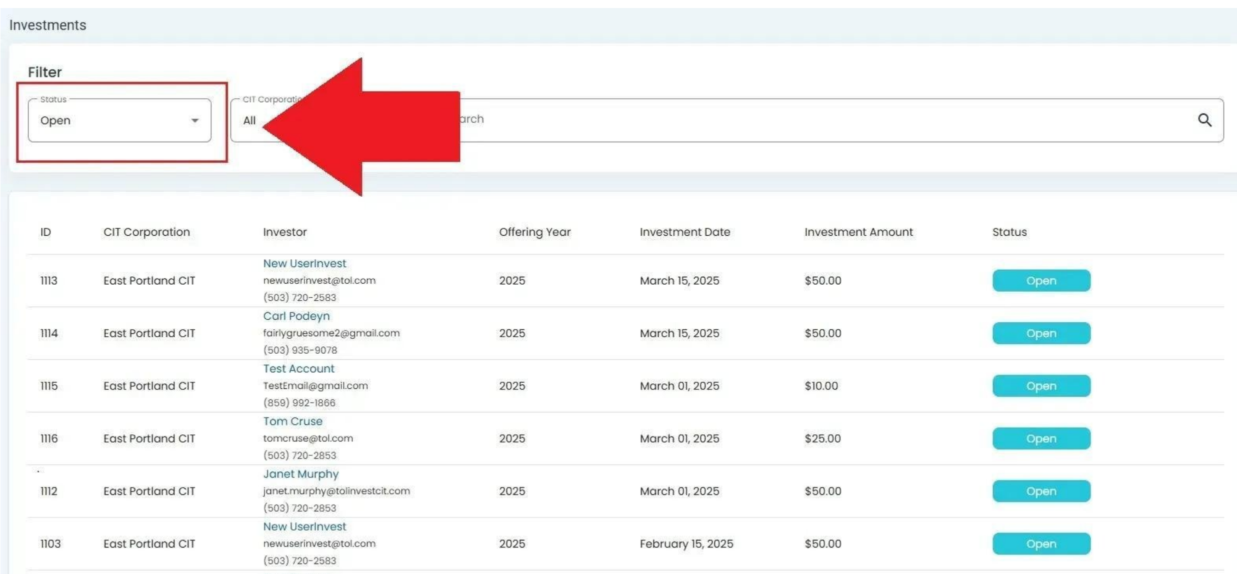


Fig. 82: Investments Status Dropdown Location

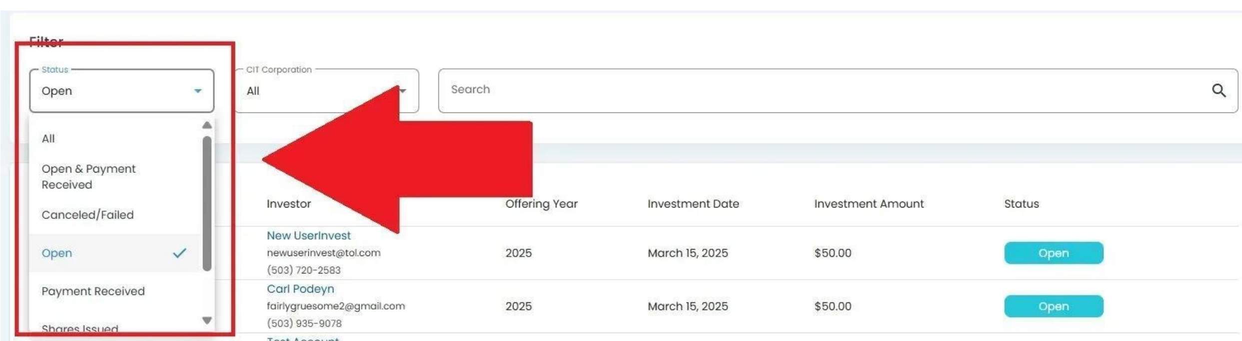


Fig. 83: Investments Status Dropdown Expanded

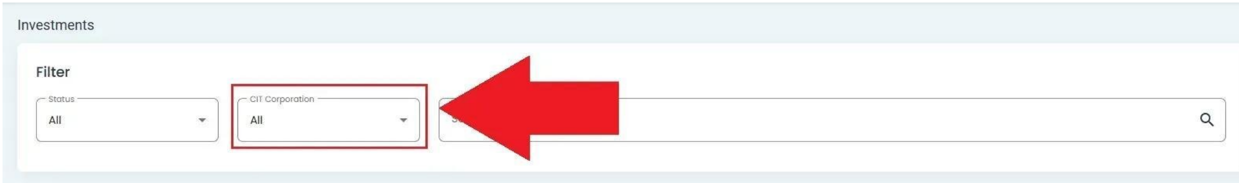


Fig. 84: CIT Corporation Dropdown Location

Fig. 85: CIT Corporation Dropdown Expanded

4. Click the search icon to apply filters.

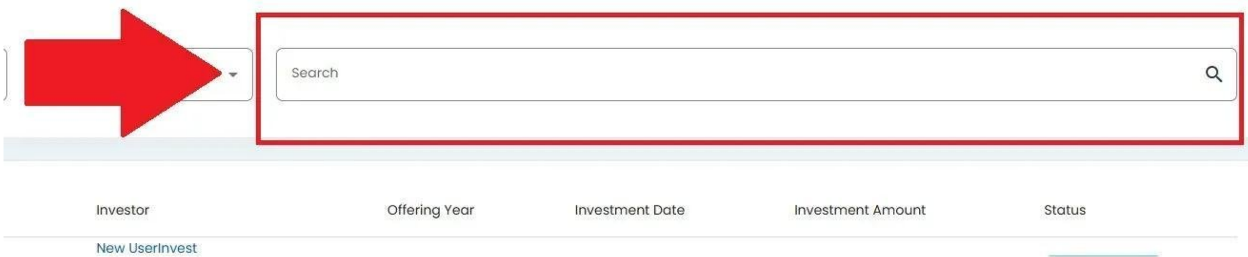


Fig. 86: Search Icon Location

Your filtered results will appear:

Investor Summary

Monthly and Quarterly Investment Summary

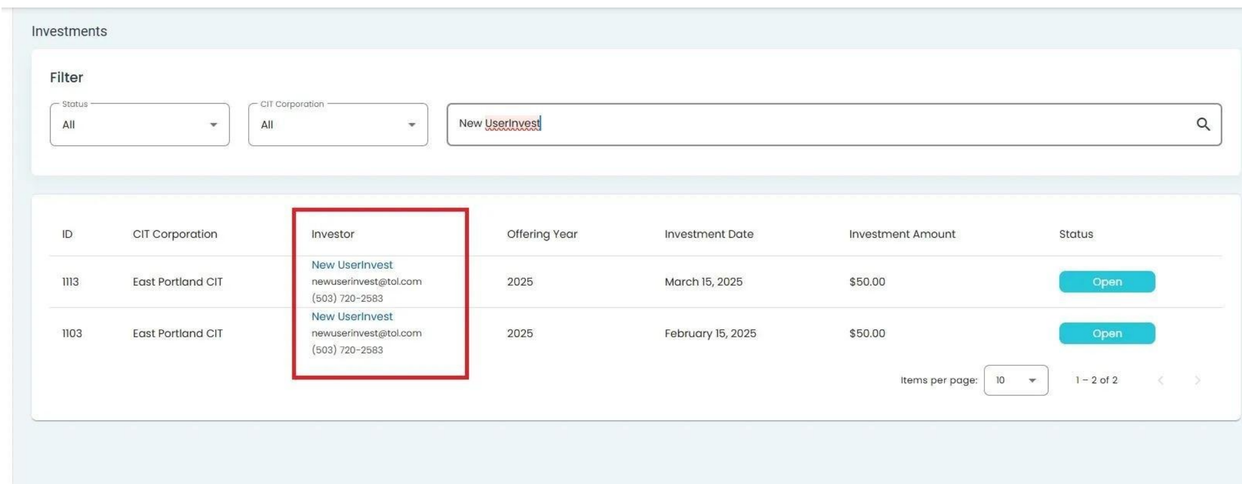


Fig. 87: Search Results

I.9 Dividend

The following **Sections** are included in the ▷ **Dividend** category:

- *Dividends*
- *Cash Payouts*

Dividends

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

Contents

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. Select the dropdown for the ▷ **Dividend** category.
3. Select **Dividends** from the dropdown.

Dividends List Table

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

Columns: Dividends List Table

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

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

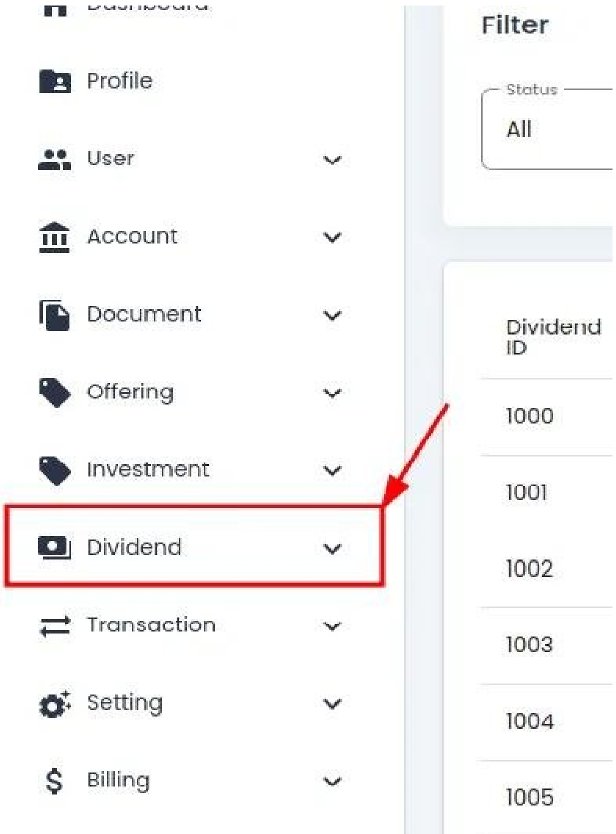


Fig. 88: Dividend Category, Primary Sidenav, Dropdown Location

- **Total Pending Payment Amount** : The amount still pending payment
- **Number of Investors** : The number of investors receiving the dividend
- **Status** : The current status of the dividend (e.g., Complete)
- **Action** : Available actions for the dividend

Using Dividends Filters

To Filter Dividends:

1. Locate the filter section above the table.

How to: Filter by Status

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

How to: Filter by Sponsor Organization

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

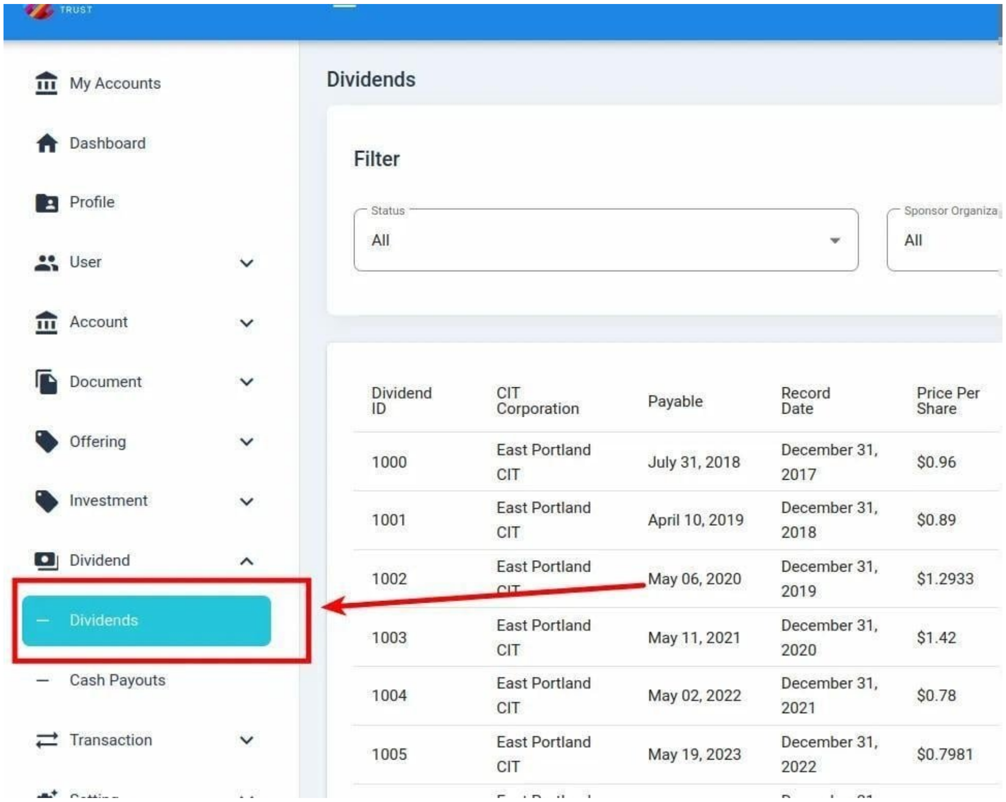


Fig. 89: Dividend, Dividends Homepage, Primary Sidenav Location

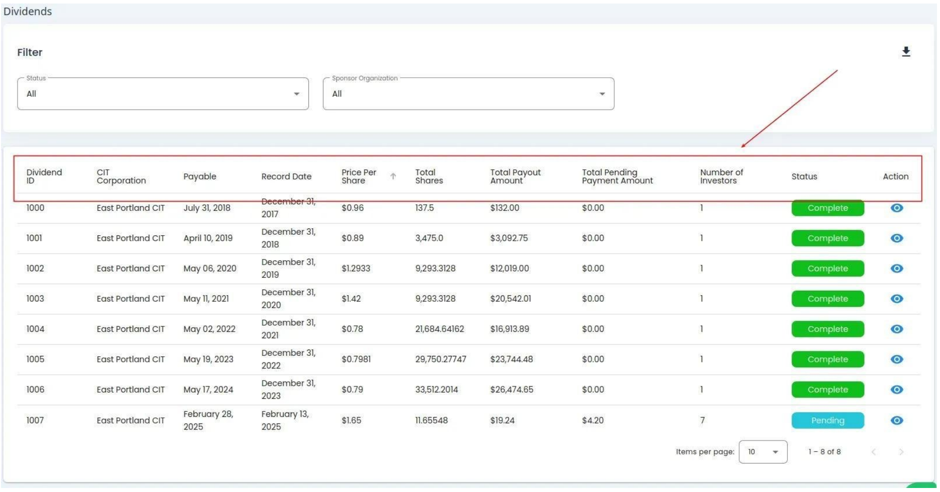


Fig. 90: Dividends Homepage

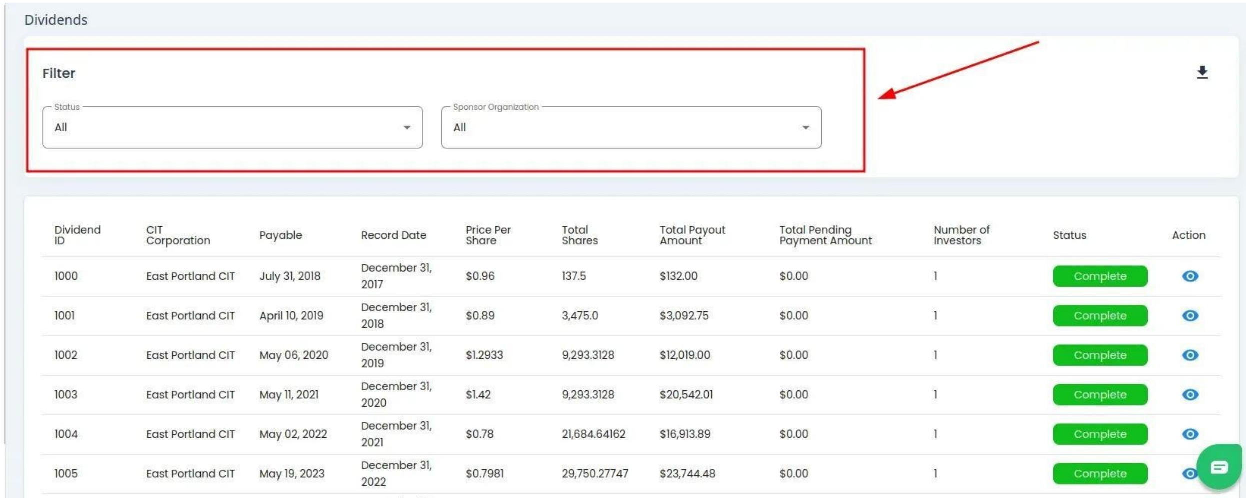


Fig. 91: Dividends Table Filter Section Highlighted

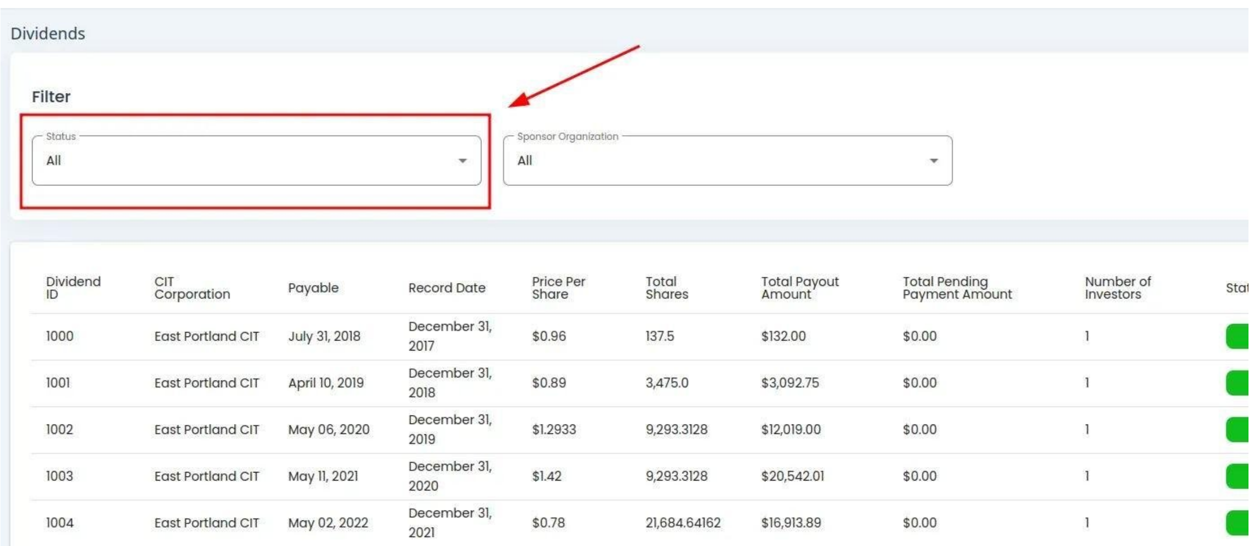


Fig. 92: Dividends, Status Dropdown Location

How to: Filter by CIT Corporation

CIT Corporation Filter Availability

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

1. Find and `Click` on the **CIT Corporation** dropdown.
2. `Select` the **CIT Corporation** you want to filter by from the dropdown.

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

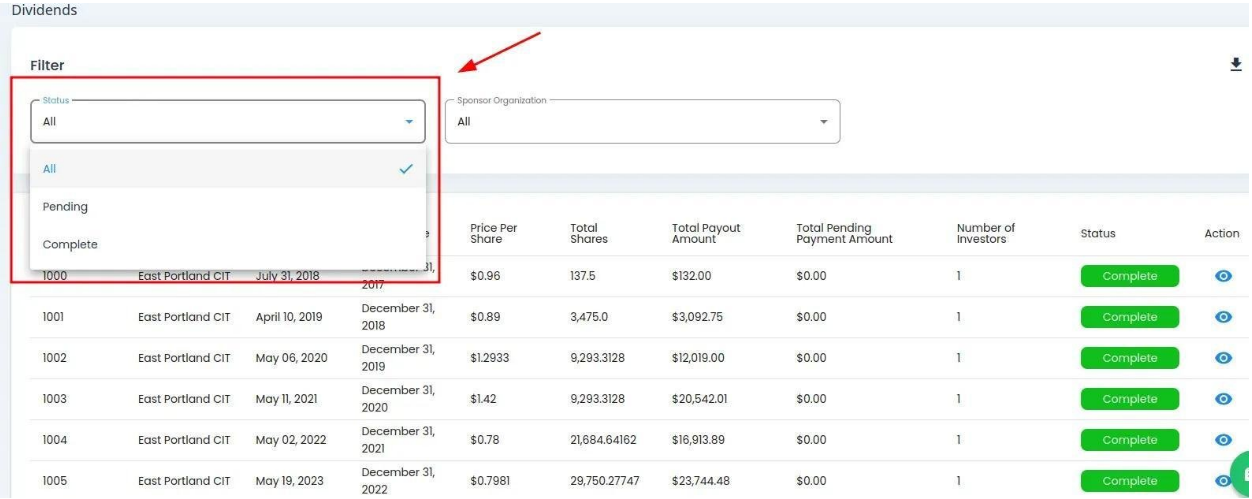


Fig. 93: Dividends, Status Dropdown Expanded

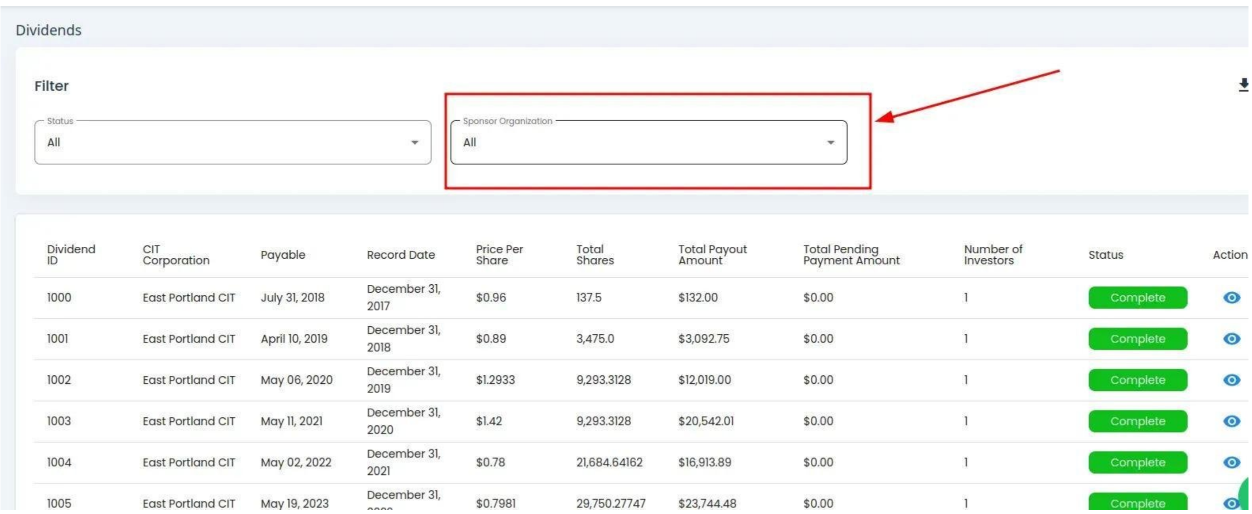


Fig. 94: Sponsor Organization Dropdown Location

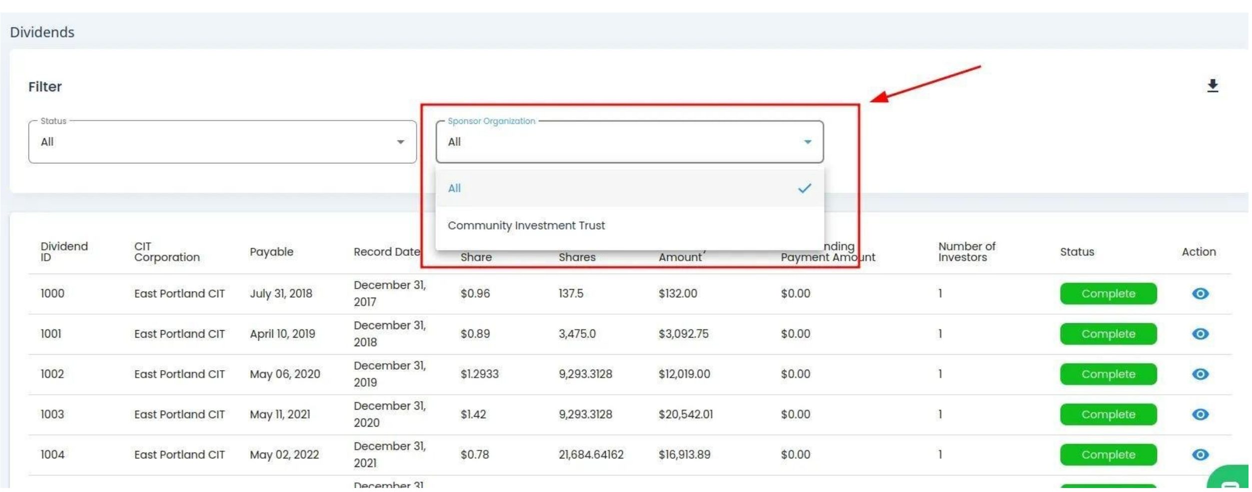


Fig. 95: Sponsor Organization Dropdown Expanded

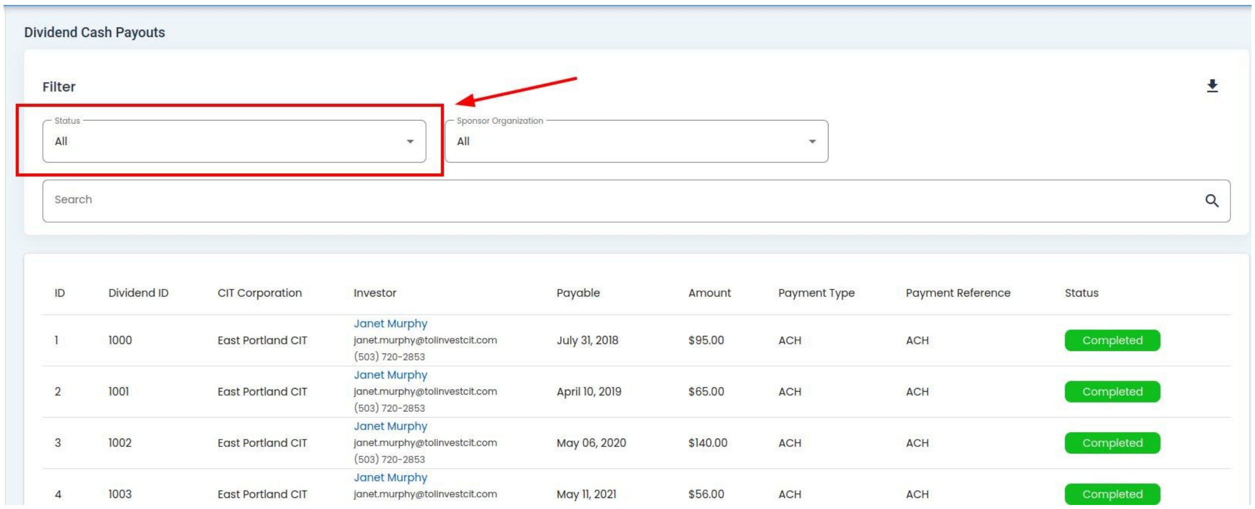


Fig. 96: CIT Corporation Dropdown Location

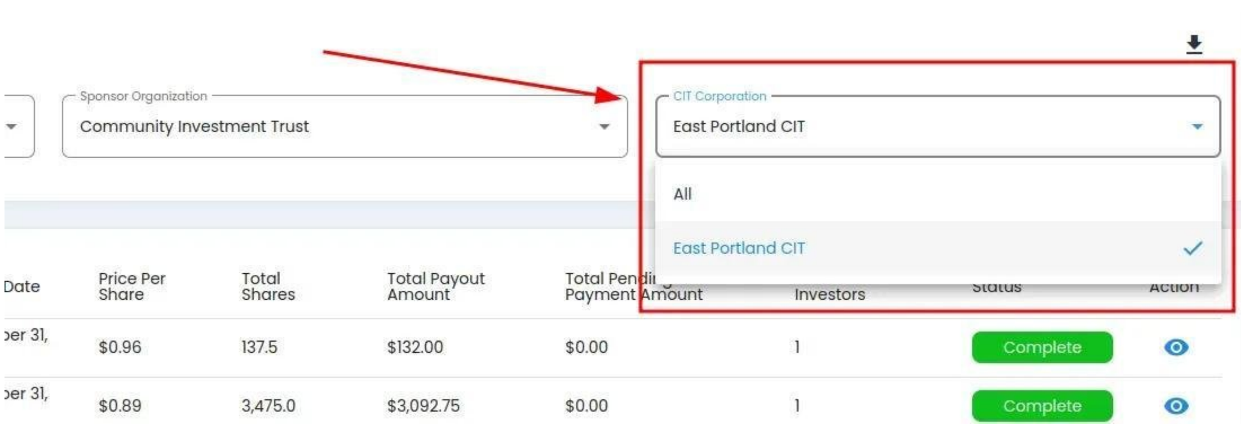


Fig. 97: CIT Corporation Dropdown Expanded

Cash Payouts

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

Contents

Cash Payouts Homepage Location

To Find the Cash Payouts List Homepage:

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

   Don't see the sidenav?

   See *How to Toggle Primary Sidebar* for more information.

2. Select the dropdown for the ▷ **Dividend** category.
3. Select **Cash Payouts** from the dropdown.

Cash Payouts List Table

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

Columns: Cash Payouts List Table

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

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

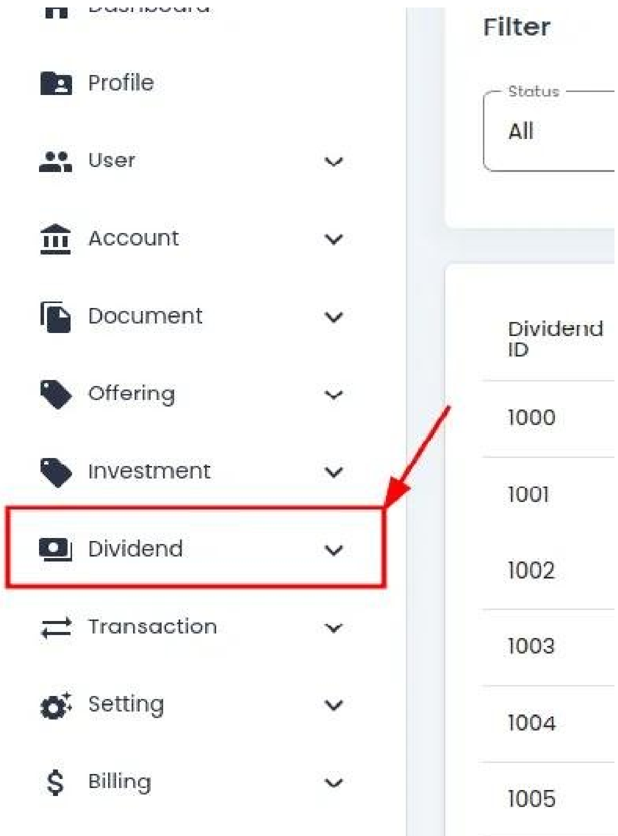


Fig. 98: Dividend Category, Primary Sidenav, Dropdown Location

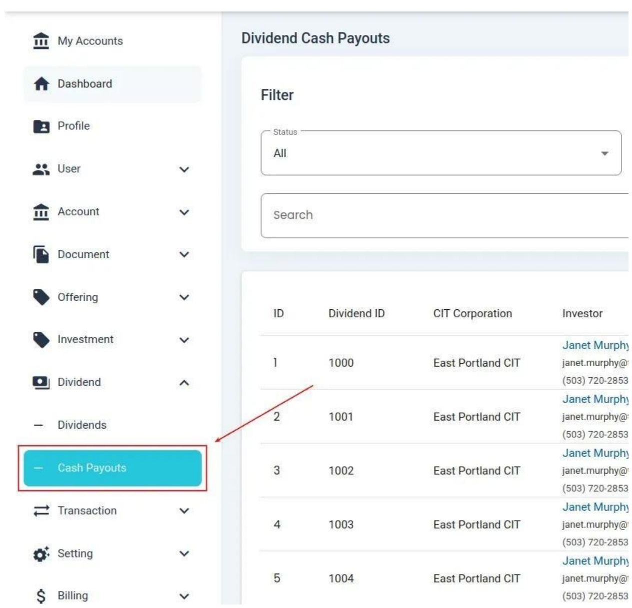


Fig. 99: Cash Payouts Homepage

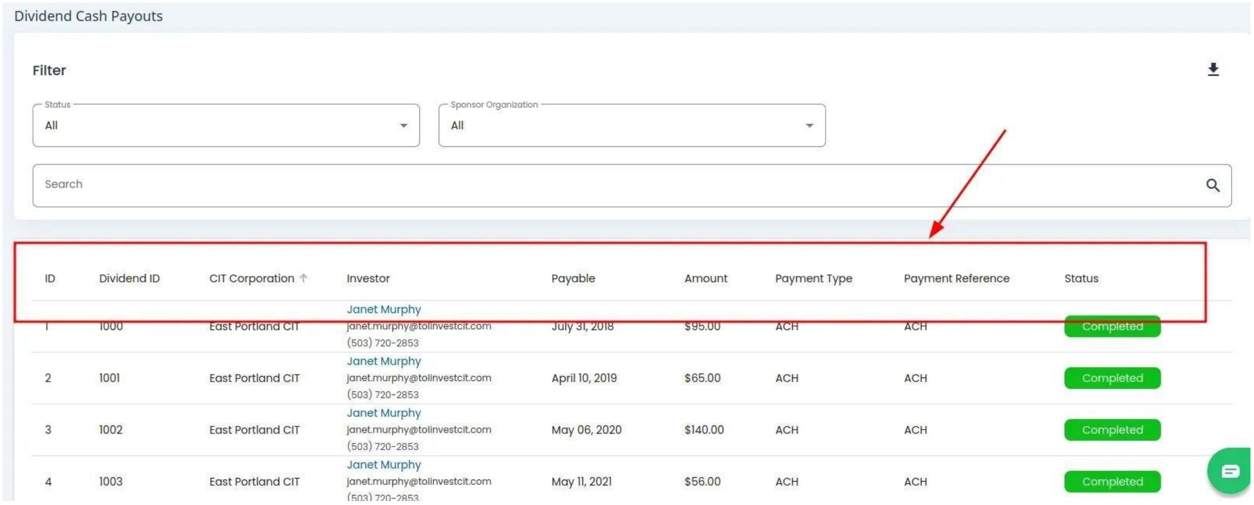


Fig. 100: Cash Payouts List Table

- `Action` : Available actions for the cash payout

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

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

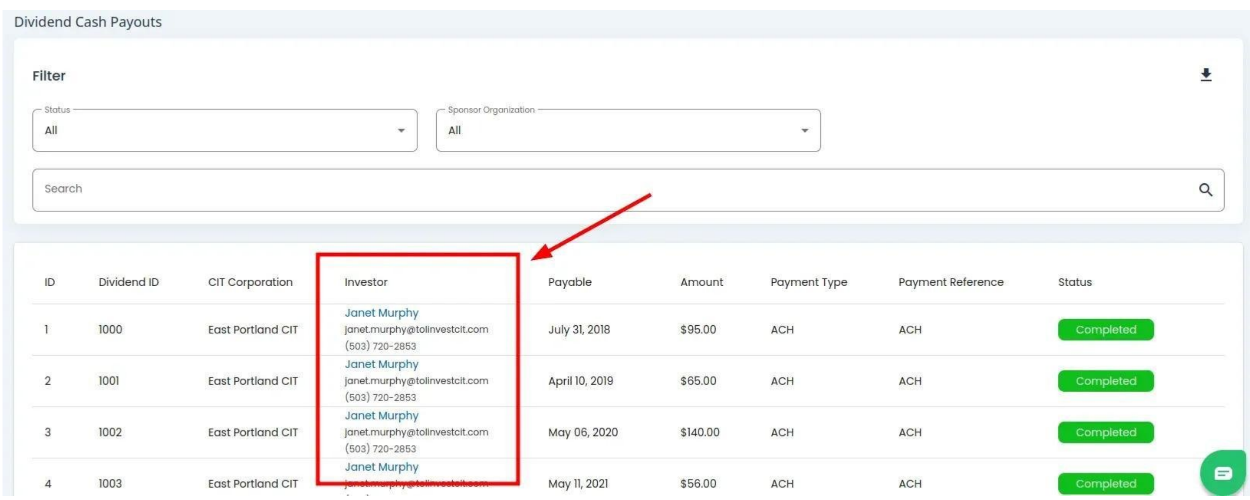


Fig. 101: Dividend, Cash Payouts, Investor Column

2. Click on the **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 **Investor's Name** .

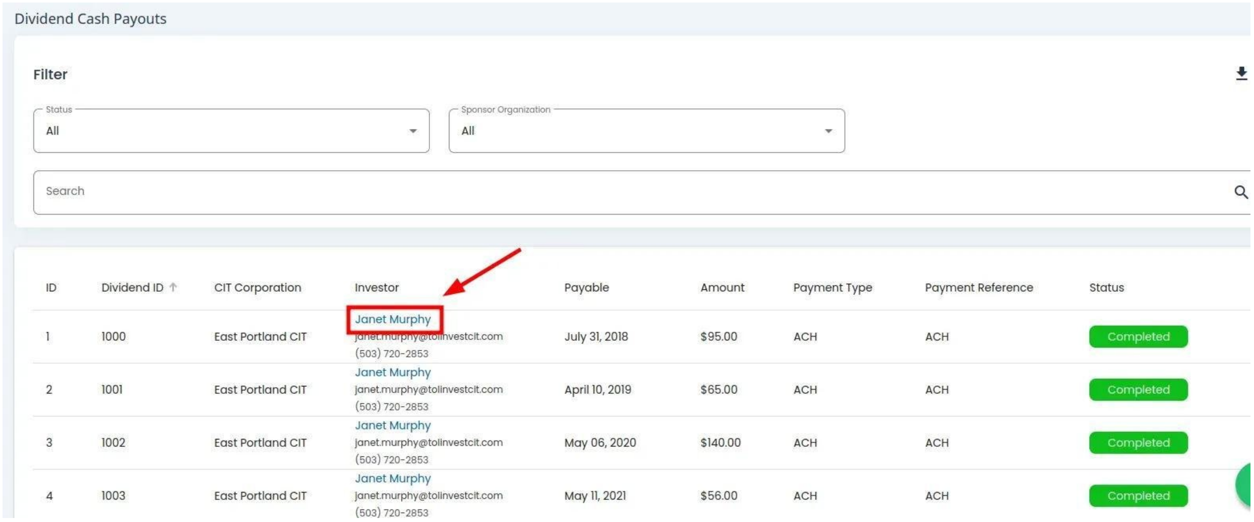


Fig. 102: Dividend, Cash Payouts, Investor Select Example

Using Cash Payouts Filters

To Filter Cash Payouts:

1. Locate the filter section above the table.

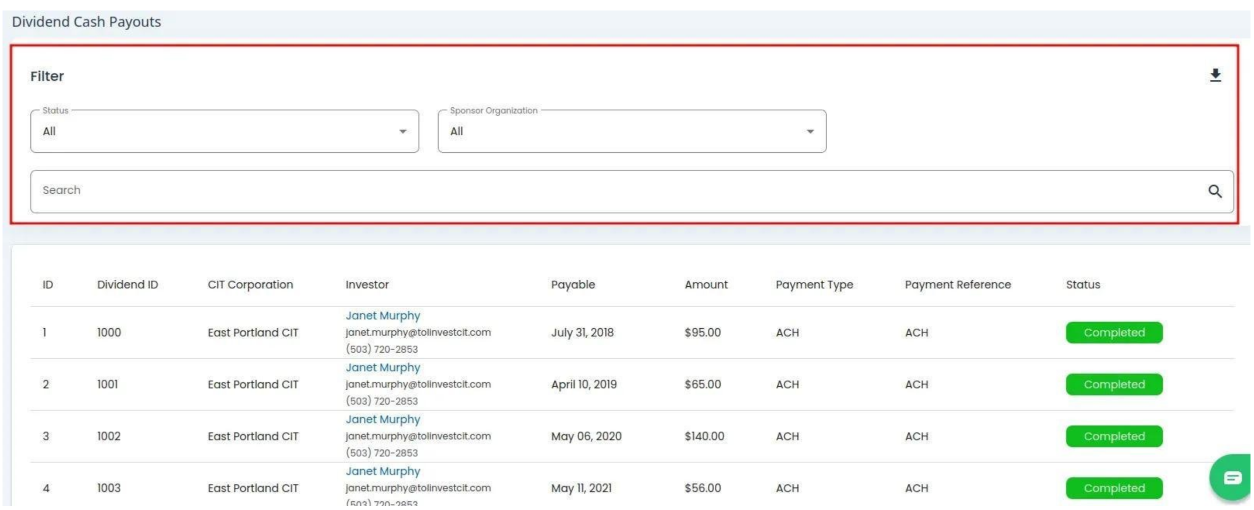


Fig. 103: Dividend, Cash Payouts, Filter Location

How to: Filter by Status

1. Find and Click on the **Status** dropdown, located above the **Cash Payouts List** table.
2. Select the **Status** you want to filter by from the dropdown.

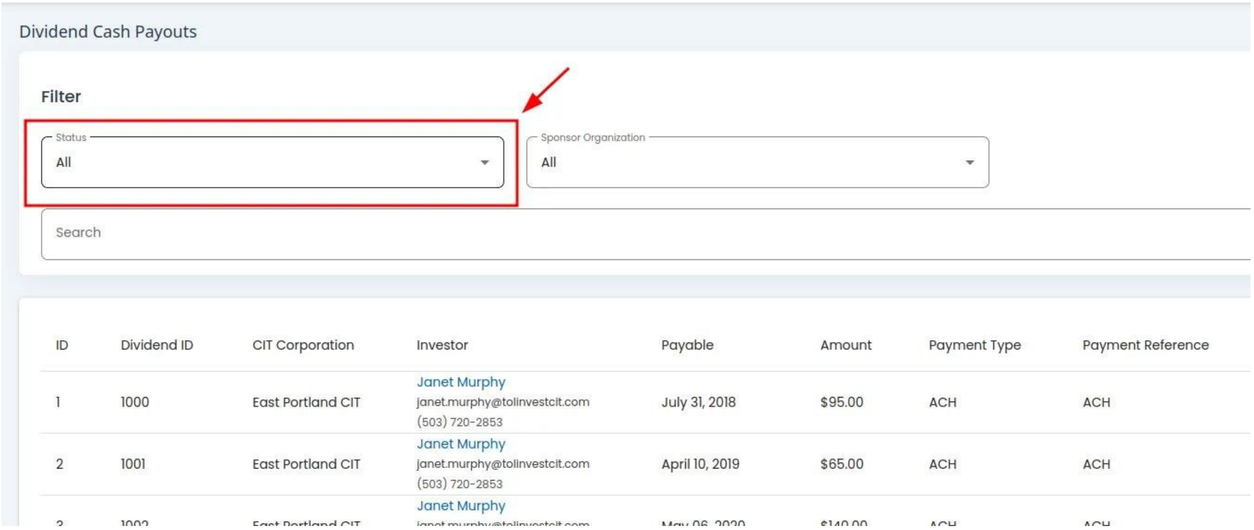


Fig. 104: Cash Payouts, Status Dropdown, Location

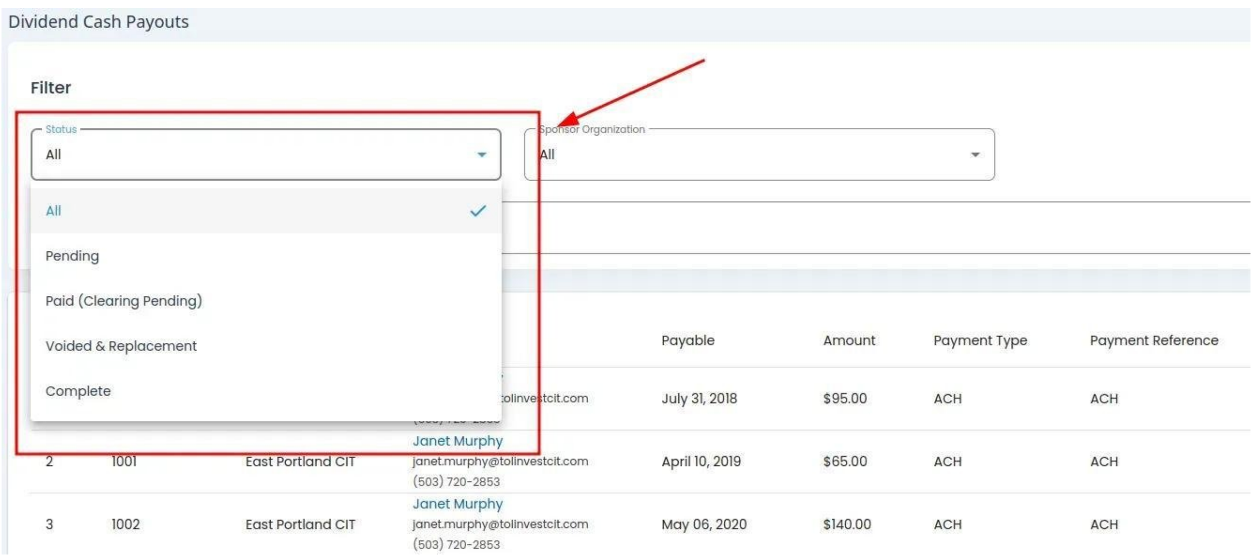


Fig. 105: Cash Payouts, Status Dropdown, Expanded

How to: Filter by Sponsor Organization

1. Find and `Click` on the **Sponsor Organization** dropdown.
2. `Select` the **Sponsor Organization** you want to filter by from the dropdown.

How to: Search for Cash Payout Information

1. Find and `Click` on the **Search** field.
2. `Type` in the **Name of the Investor** you want to see `Cash Payouts` for.

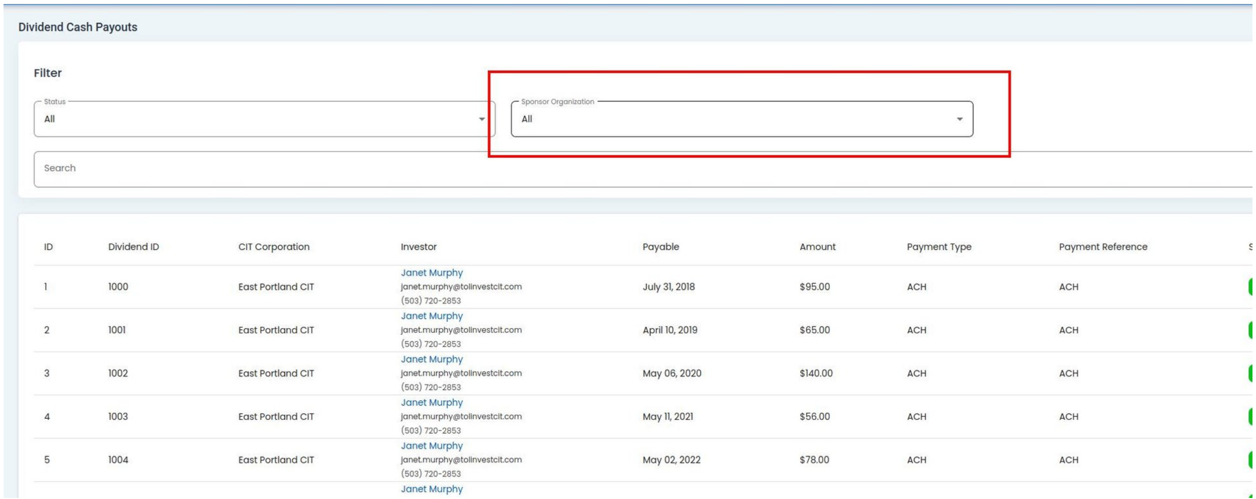


Fig. 106: Cash Payouts, Sponsor Organization Dropdown, Location

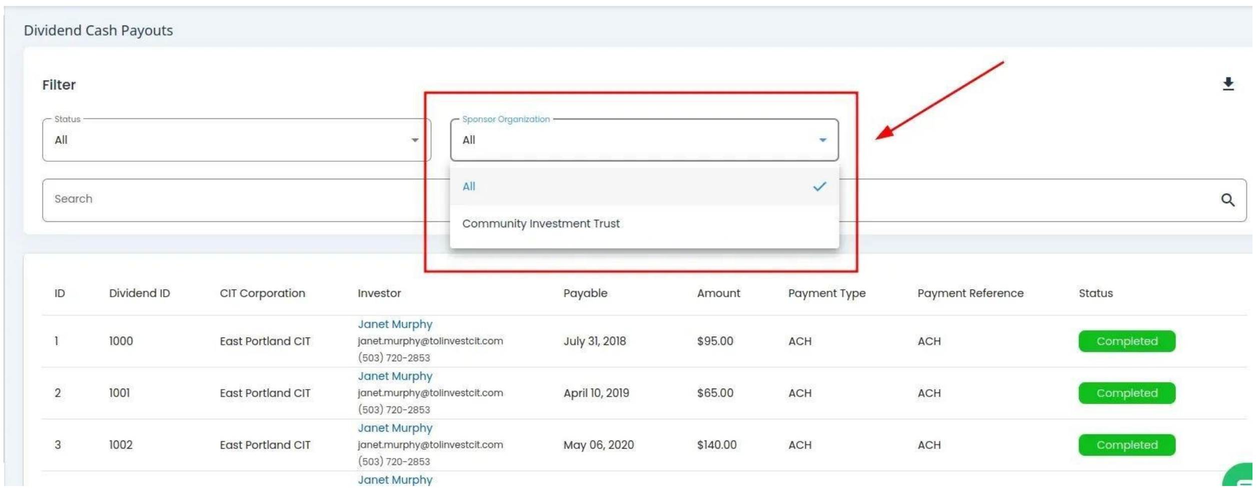


Fig. 107: Cash Payouts, Sponsor Organization Dropdown, Expanded

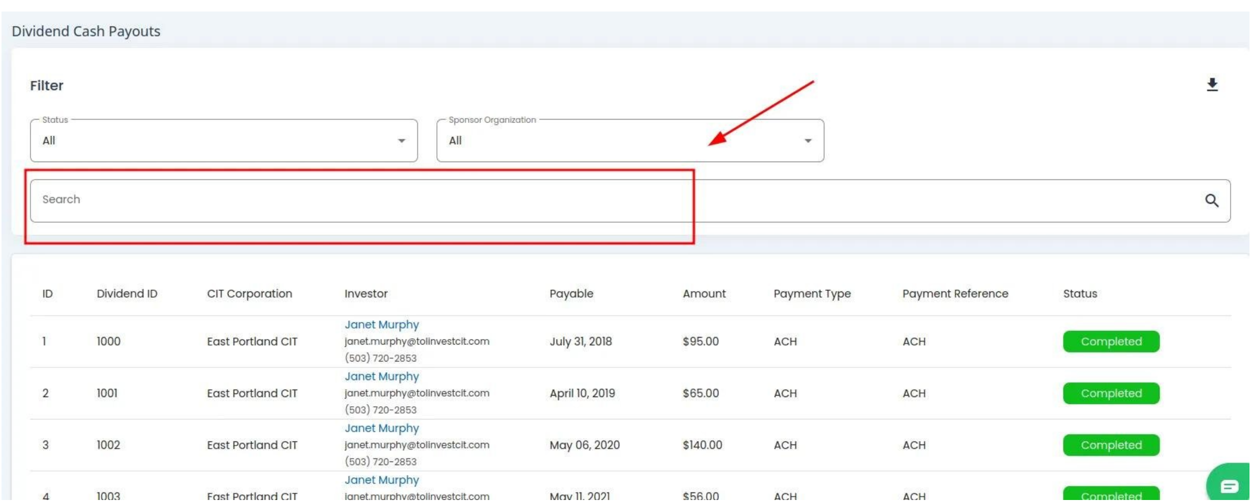


Fig. 108: Cash Payouts, Search Bar, Location

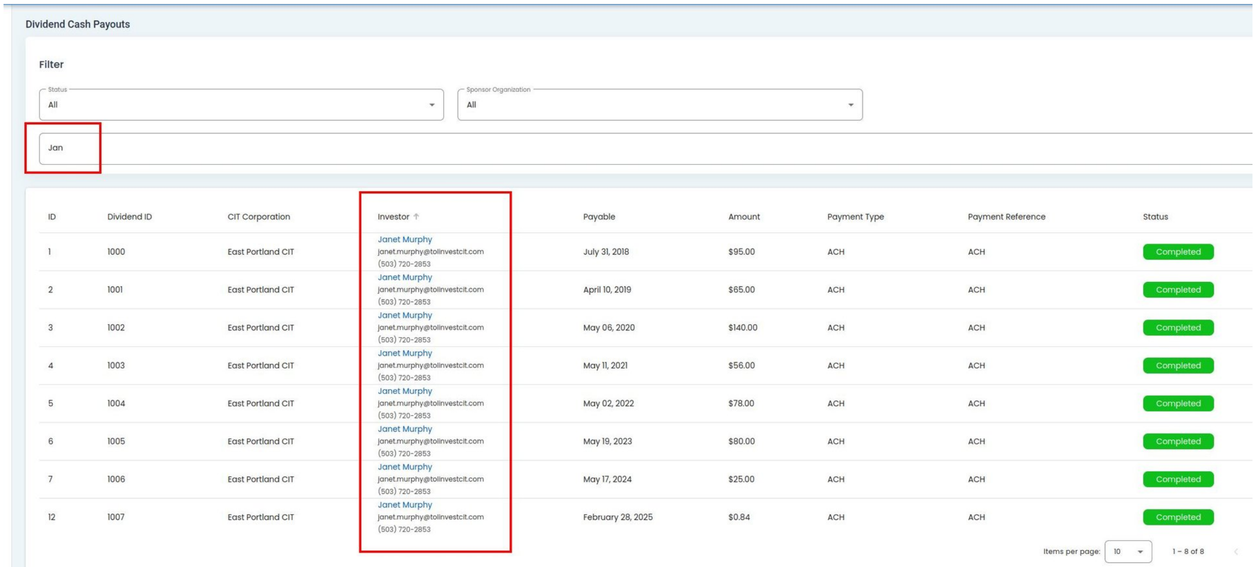


Fig. 109: Cash Payouts, Search Bar, Search Example

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

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

How To: View More Information

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

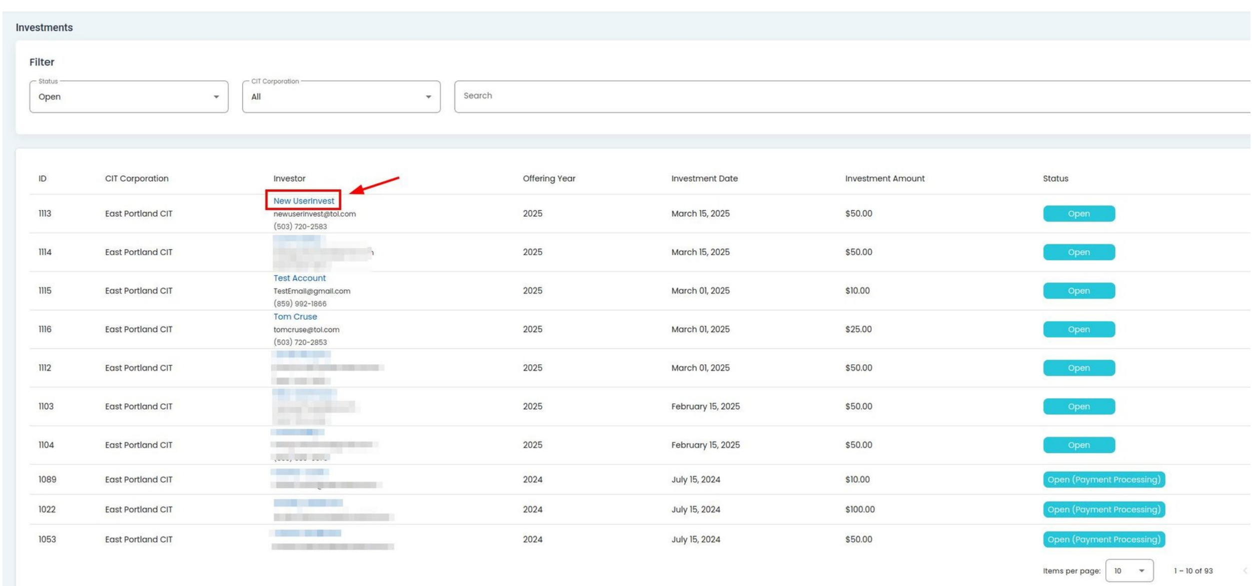


Fig. 110: Cash Payouts, Investor Click

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

See *View Investor Details* for more information.

I.10 Transaction

The following **Sections** can be found in the ▷ **Transaction** category:

- *Directives*
- *Complete Transactions*

Directives

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

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 ▷ **Transaction** category.
3. Select **Directives** from the dropdown.

Directives List Table Overview

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

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

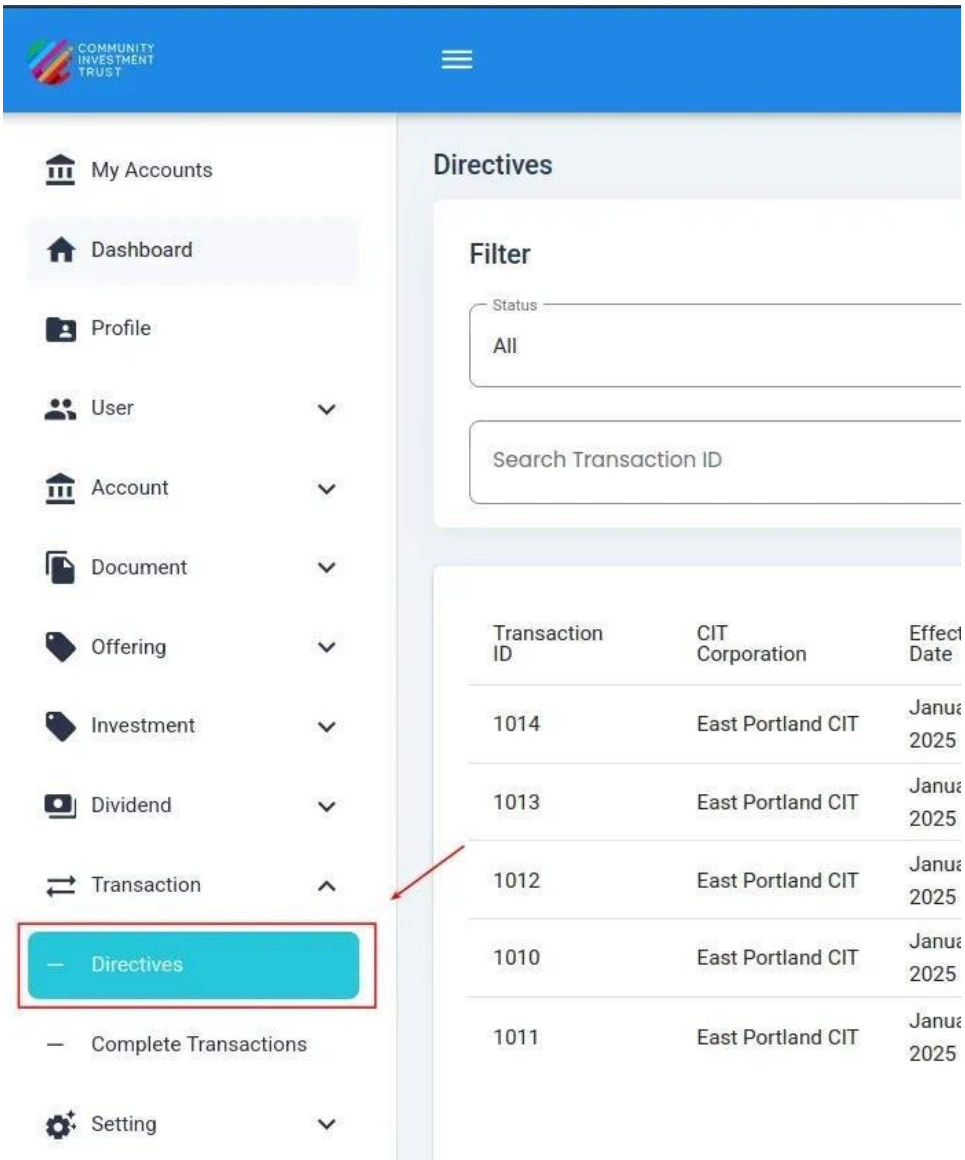


Fig. 111: Directives Homepage

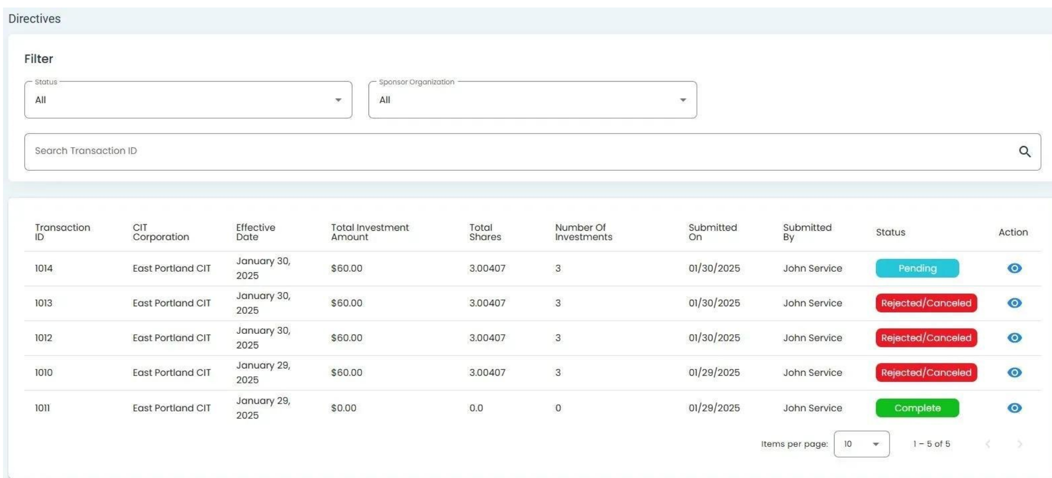


Fig. 112: Directives List Table showing transaction directives with status indicators

Filtering the Directives List

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

- *Status*
- *Sponsor Organization*

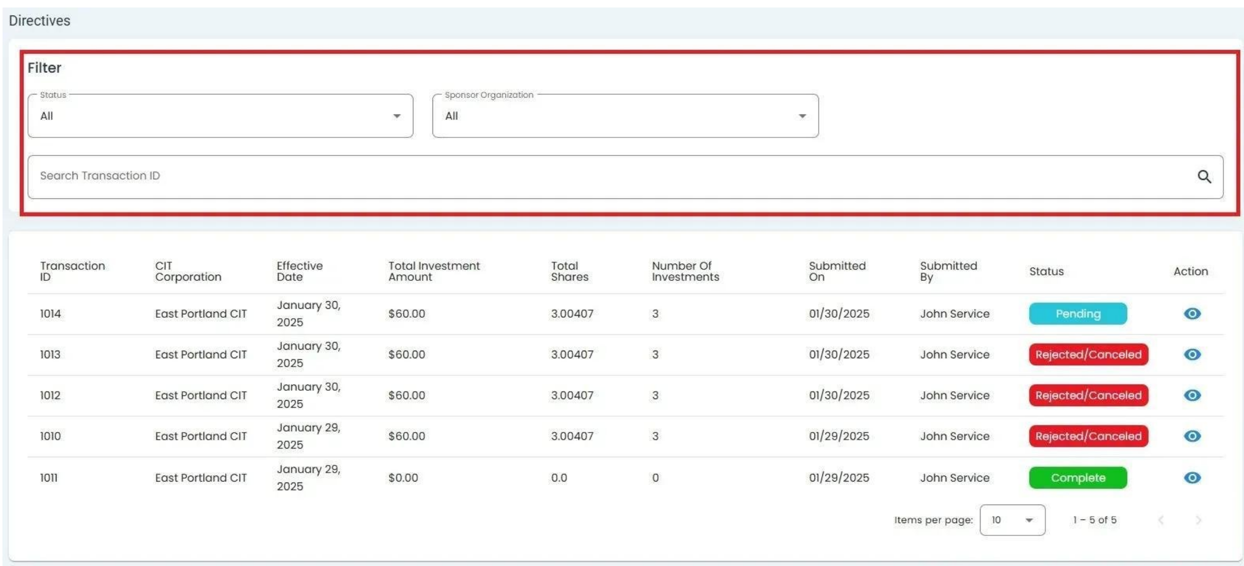
How to Filter by Status or Sponsor Organization

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:



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

Status Filter Dropdown

1. Find and Click on the `Status` dropdown to filter by status.
2. Select from available status options:

Sponsor Organization Filter Dropdown

1. `Find` and `Click` on the **Sponsor Organization** dropdown to filter by organization.
2. Select from available organization options:

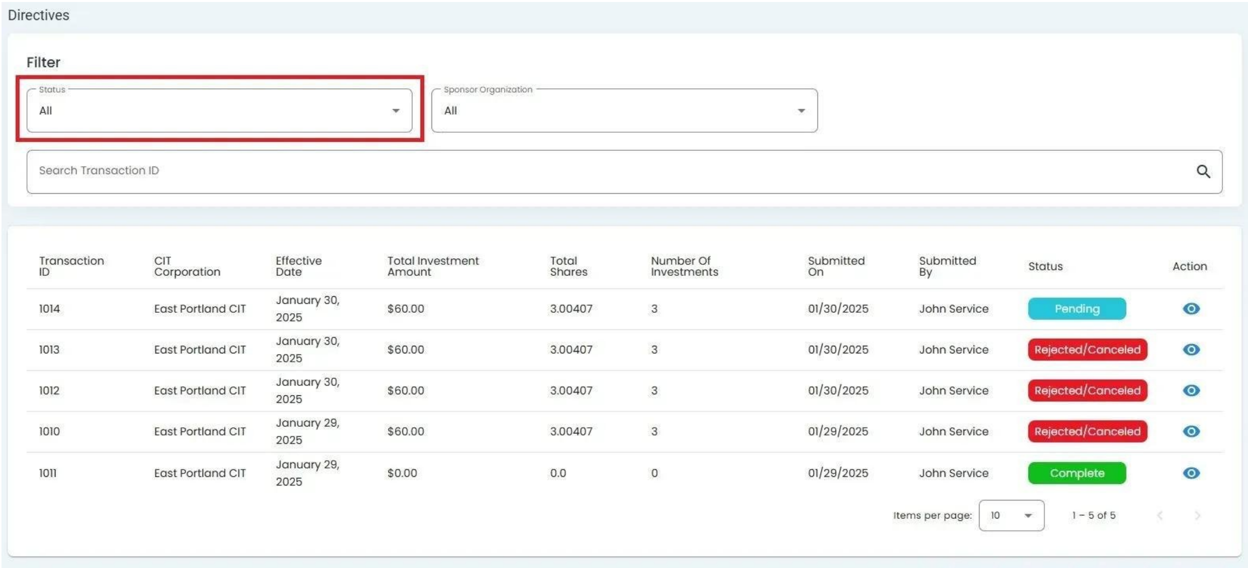


Fig. 114: Status dropdown in the Directives filter section

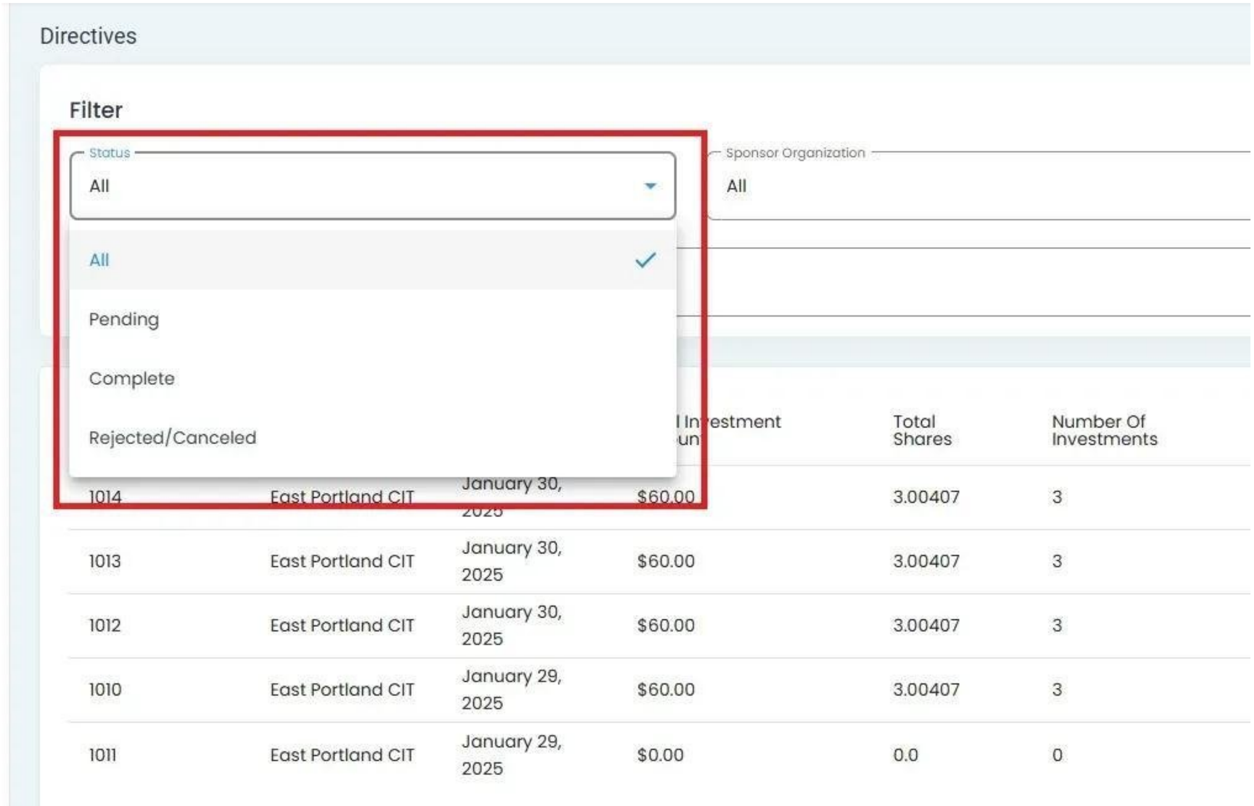


Fig. 115: Status dropdown expanded showing All, Pending, Complete, and Rejected/Canceled options

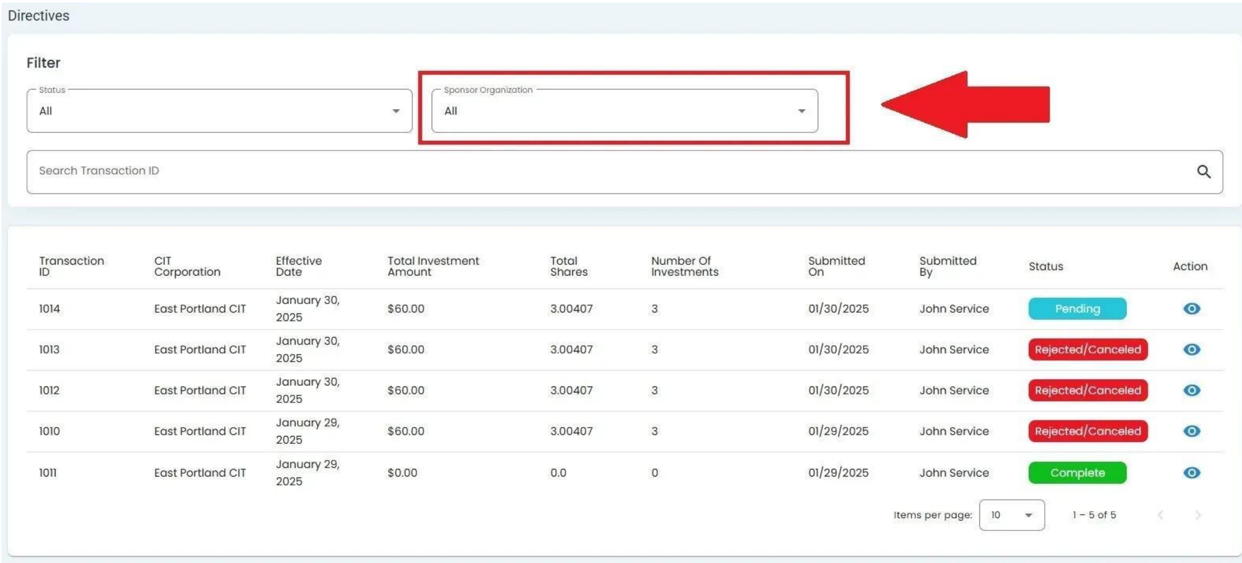


Fig. 116: *Sponsor Organization dropdown in the filter section*

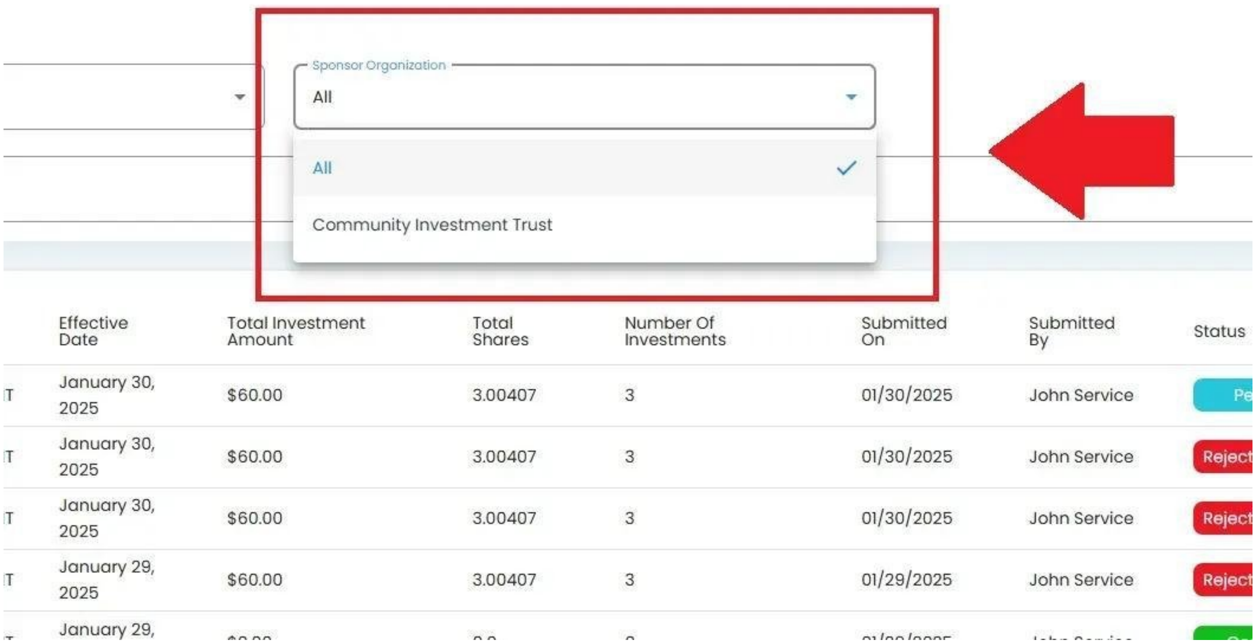


Fig. 117: *Sponsor Organization dropdown expanded showing All and Community Investment Trust options*

How to Search for Directives

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

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

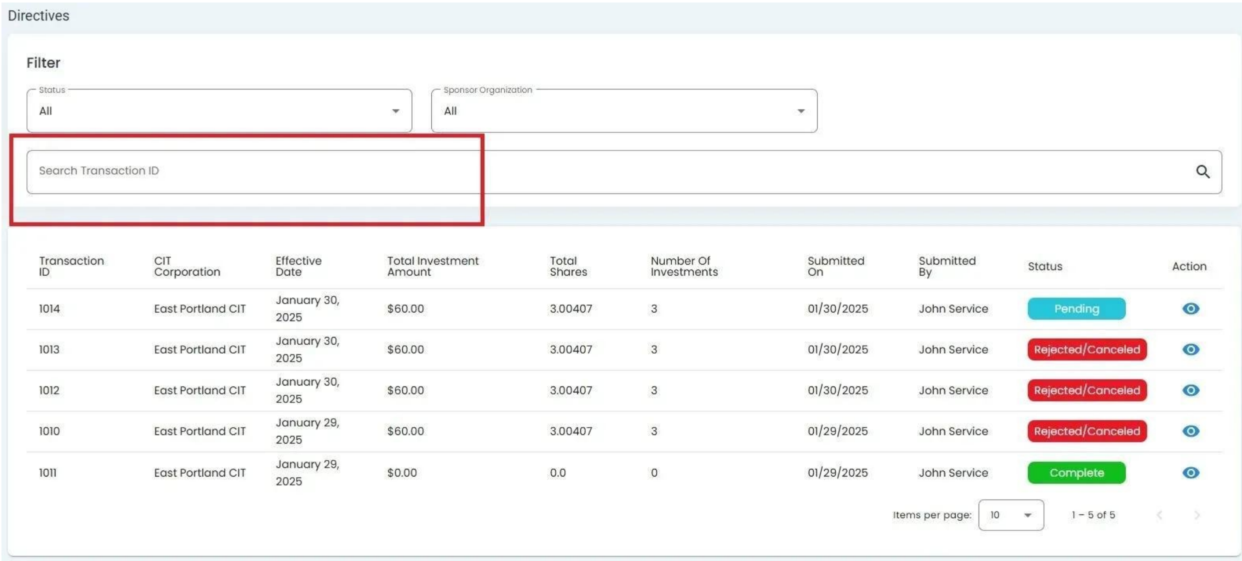


Fig. 118: Search Bar for Transaction ID

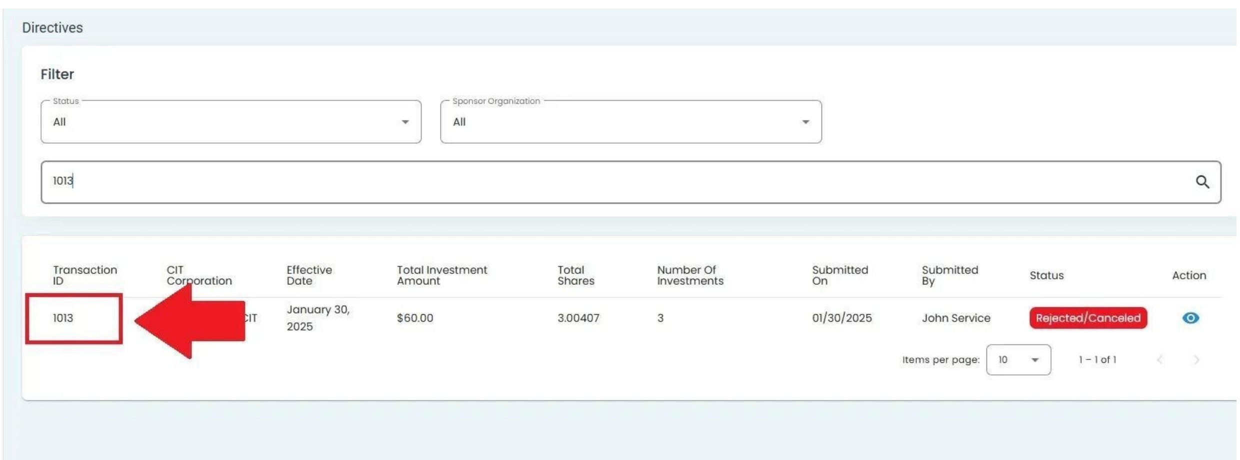


Fig. 119: Search Bar for Transaction ID with search results

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

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

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.

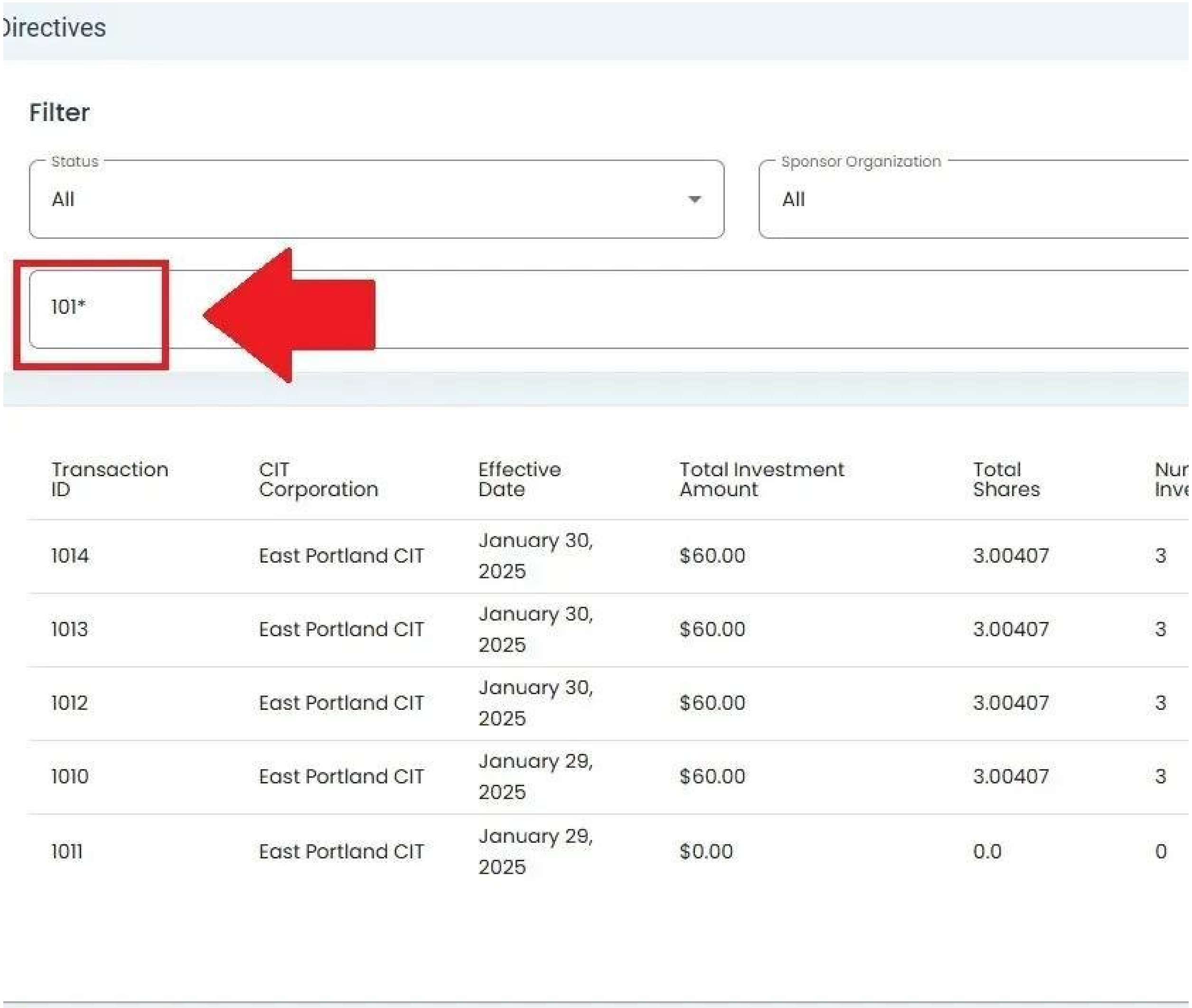


Fig. 120: Search Bar for Transaction ID with wildcard search

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

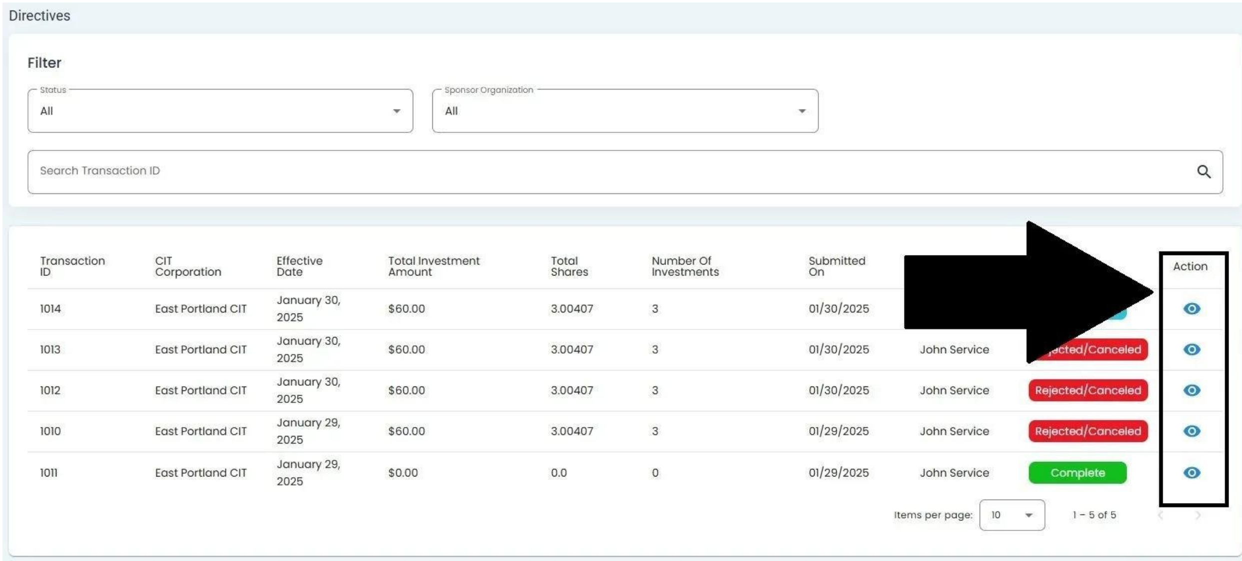


Fig. 121: Eye icon in the Action column for viewing directive details

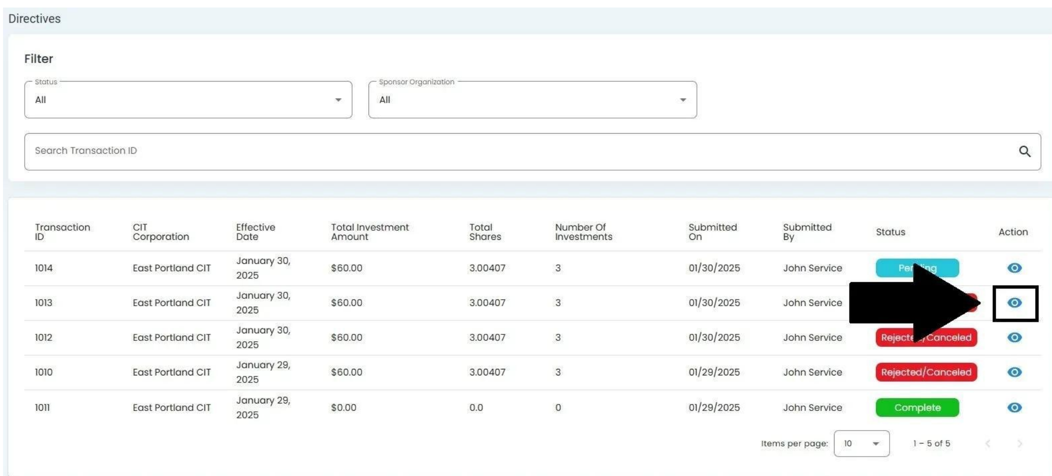


Fig. 122: Directive Details Screen showing comprehensive information about Transaction ID 1014 including Info and Investments sections

- Status
- Additional Instructions (if any)

Investments Section

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

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

Complete Transactions

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

Contents

Complete Transactions Homepage Location

To Find the Complete Transactions List Homepage:

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

   Don't see the sidenav?

   See *How to Toggle Primary Sidebar* for more information.

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

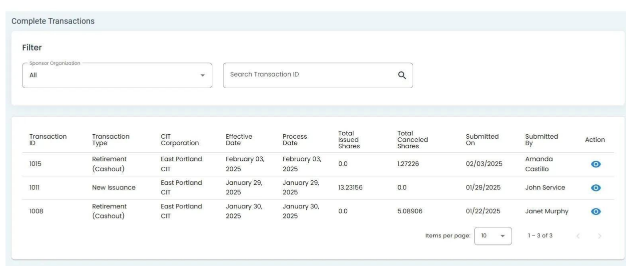


Fig. 123: Complete Transactions Homepage

Complete Transactions List Table

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

Columns: Complete Transactions List Table

The **Complete Transactions List** table has the following **Columns**:

- **Transaction ID**: The unique identifier for the transaction
- **Date**: The date when the transaction occurred

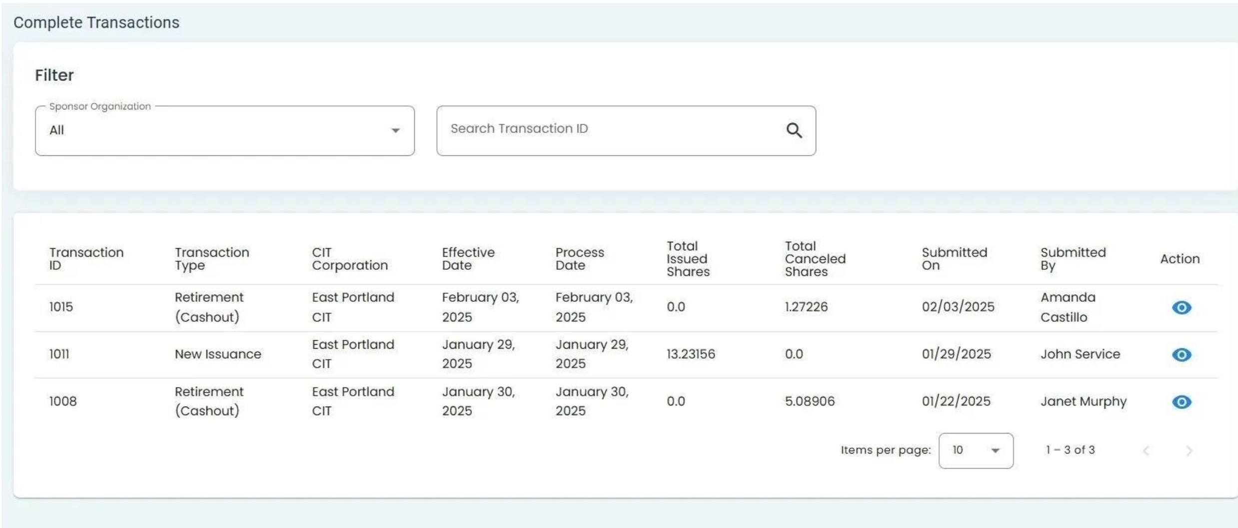


Fig. 124: Complete Transactions List Table

- `Investor` : The investor associated with the transaction
- `Organization` : The organization associated with the transaction
- `Amount` : The amount of the transaction
- `Transaction Type` : The type of transaction
- `Status` : The current status of the transaction
- `Action` : Available actions for the transaction

Using Complete Transactions Filters

To Filter Complete Transactions:

1. Locate the filter section at the top of the table.
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 **Search Transaction ID** field.

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

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

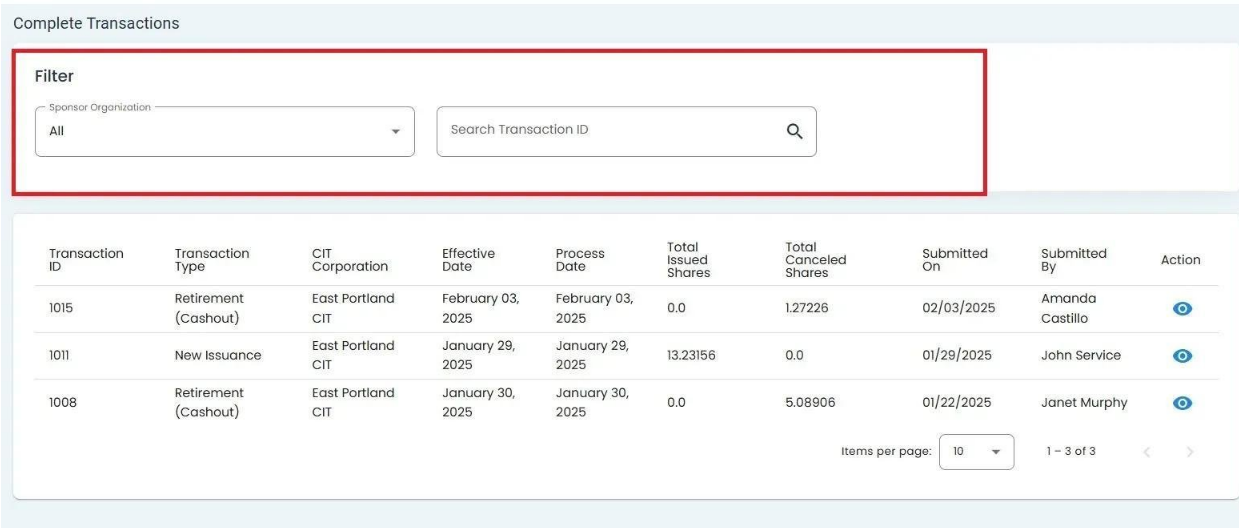


Fig. 125: Complete Transactions Table Filter Section Highlighted

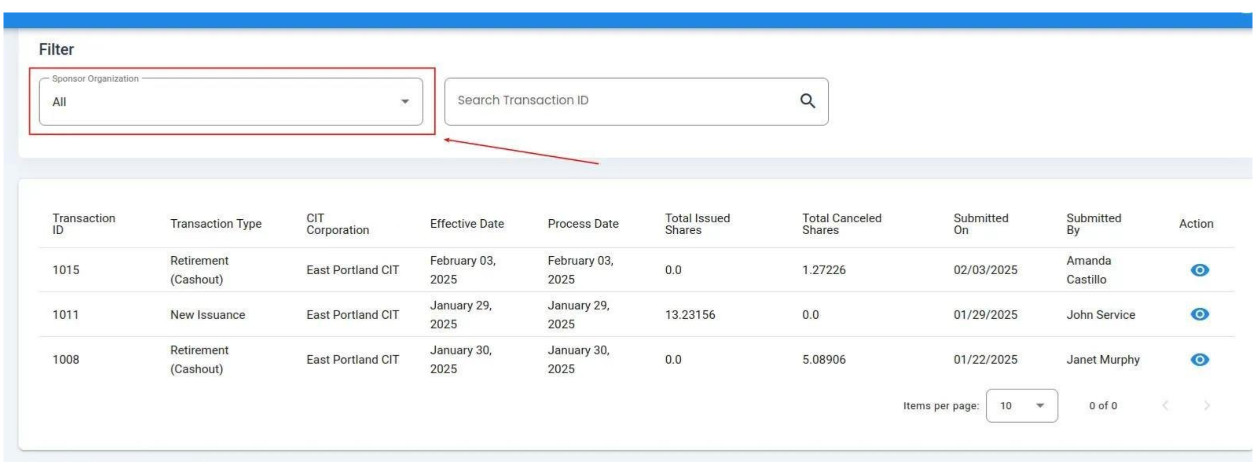


Fig. 126: Complete Transactions Status Dropdown Location

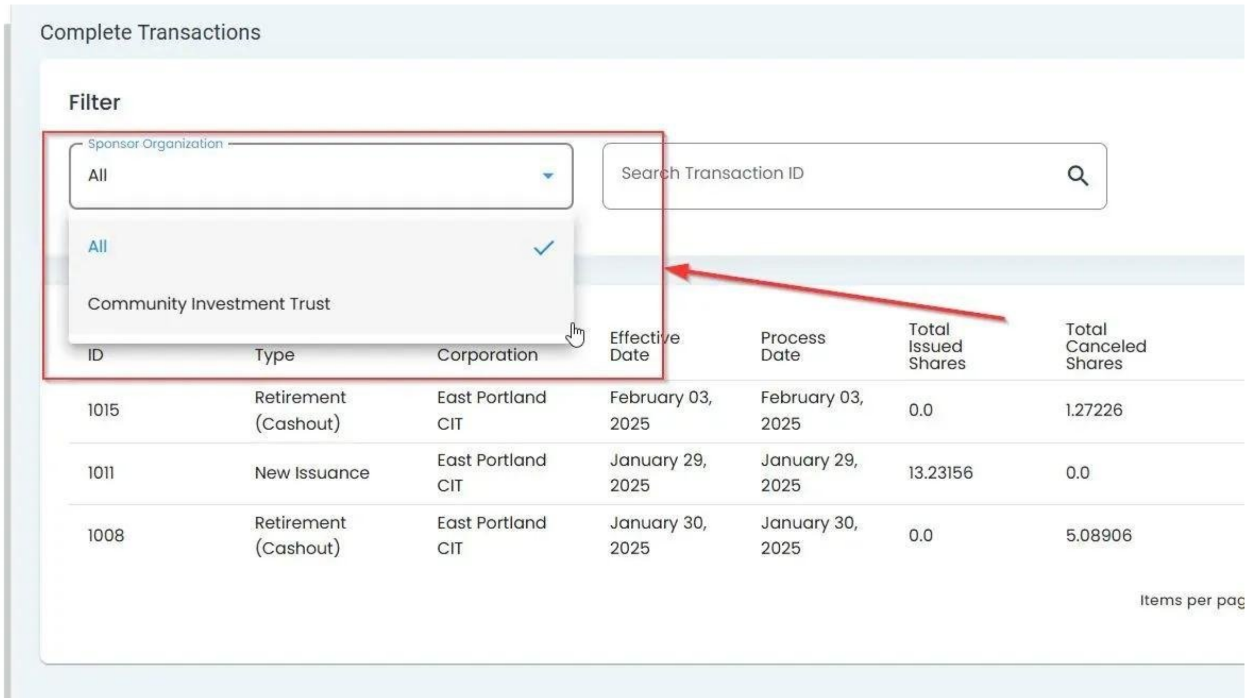


Fig. 127: Sponsor Organization, Dropdown Expanded

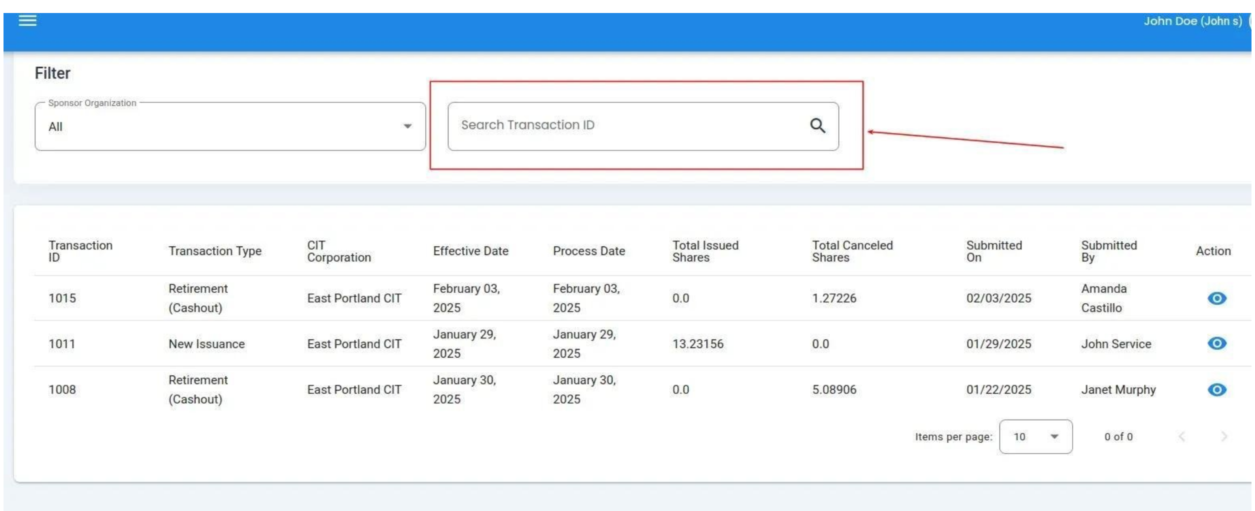


Fig. 128: Search Transaction ID Field Location

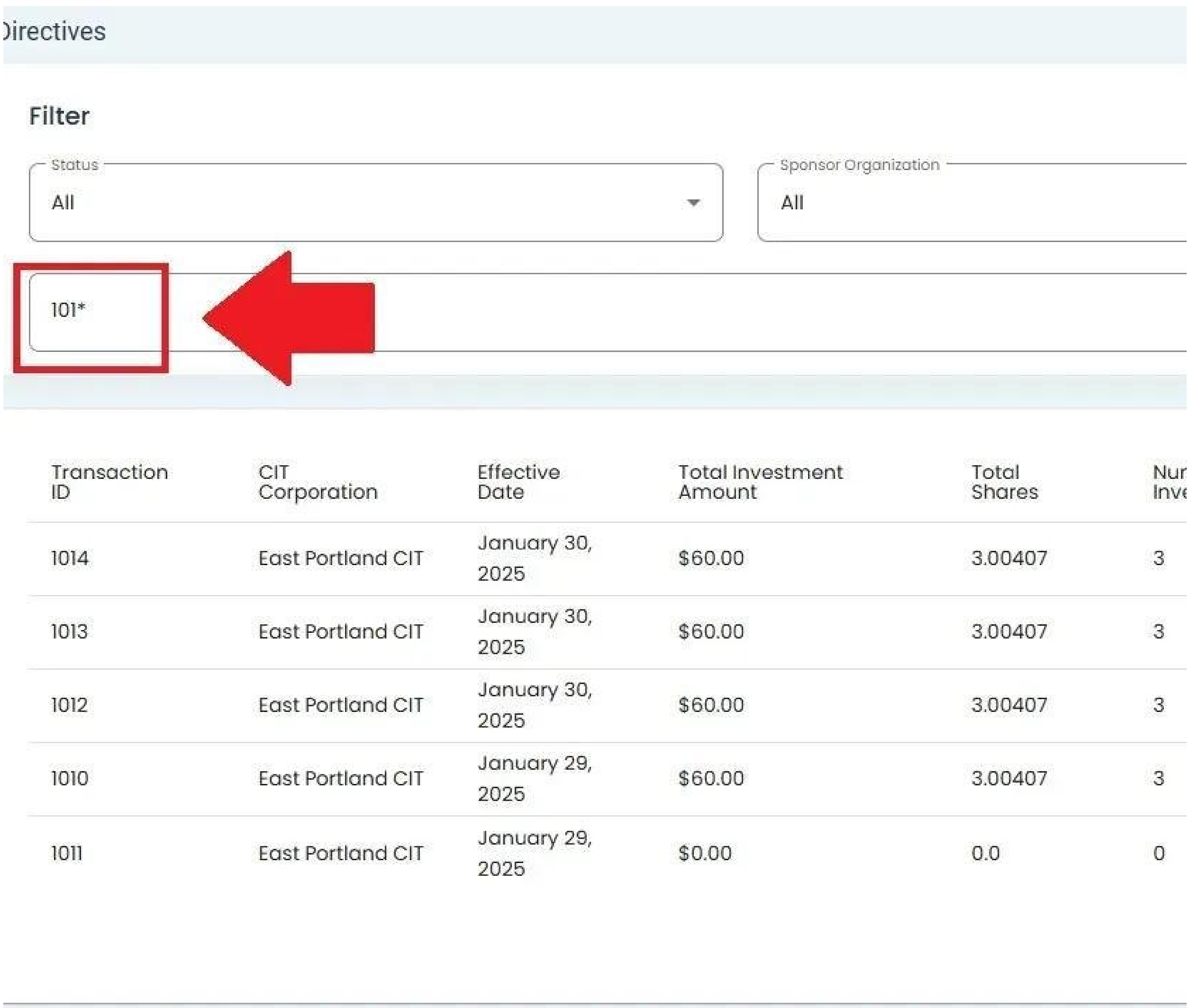


Fig. 129: Search Bar for Transaction ID with wildcard search

I.11 Settings

The ⊛ **Settings** category contains configuration options for your community organization.

Table of Contents

Features: Settings

The ⊛ **Settings** category allows you to:

- *Manage your organization's profile*
- *Manage staff accounts*
- *Configure notification preferences*
- *Configure demographic questions*
- *Configure renewal demographic questions*
- *Configure median family income settings*

Settings Sections

The following sections are available in the ⊛ **Settings** category:

Community Profile

View and edit your organization's profile information including contact details and address.

Staff Management

Manage staff accounts, add new staff members, and configure permissions.

Receive Notifications

Configure email notification preferences for your account.

Demographic Questions

Configure the demographic data collection questions presented to investors.

Renew Demographic Questions

Configure questions presented during the demographic renewal process.

Median Family Income (MFI)

Configure income thresholds for determining investor eligibility.

Community Profile

The **Community Profile** settings allow community users to view and edit their organization's profile information.

Table of Contents

Features: Community Profile

The **Community Profile** settings allow you to:

- View your organization's profile information
- Edit organization details
- Update contact information
- Manage address information

Location

The **Community Profile** settings page is located in the ⊛ **Settings** category in the **Primary Sidenavigation** menu.

Profile Overview

The **Community Profile** page displays your organization's current profile information.

Profile Fields

The following fields are available on the Community Profile page:

Profile Field Descriptions

- **Organization Name** The official name of your community organization
- **Website** Your organization's website URL
- **Email** Primary contact email address
- **Phone** Contact phone number
- **Street** Street address
- **City** City location
- **State** State or province

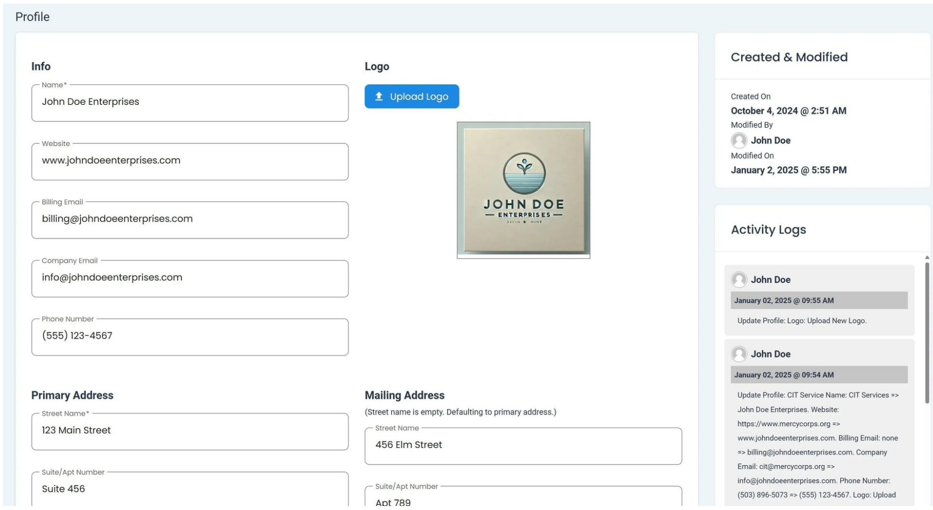


Fig. 130: Community Profile Overview

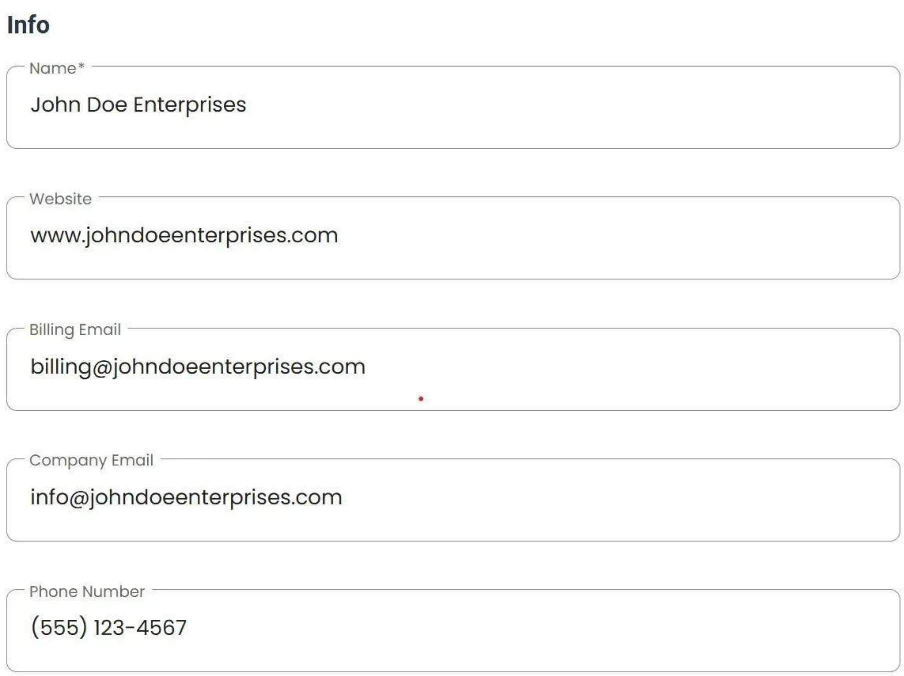


Fig. 131: Community Profile Fields

- **Zip** Postal/ZIP code

Edit Profile

To edit your organization’s profile information, `click` the button.

> **Note**
>
> Changes to your organization’s profile may require approval depending on your permissions.

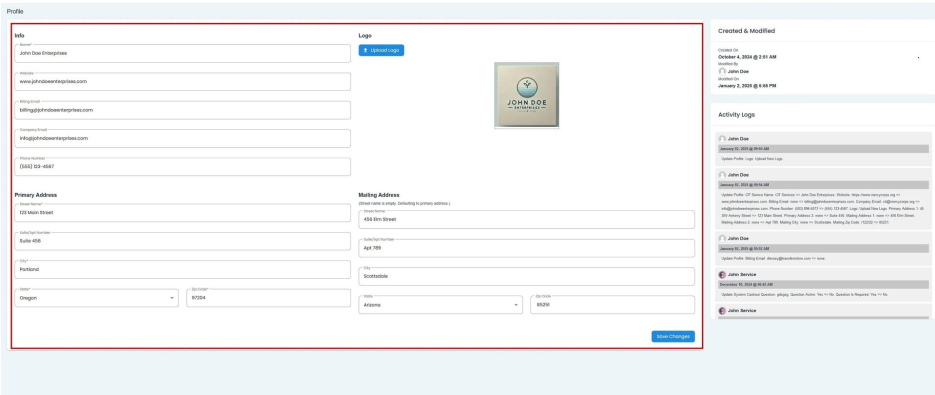


Fig. 132: Edit Profile Button

Staff Management

The **Staff Management** settings allow community users to manage staff accounts and permissions for their organization.

Table of Contents

Features: Staff Management

The **Staff Management** settings allow you to:

- View all staff members in your organization
- *Add new staff members*
- View staff details
- Manage staff permissions

Location

The **Staff Management** settings page is located in the **Settings** category in the **Primary Sidenavigation** menu.

Staff List Overview

The **Staff Management** page displays all staff members associated with your organization.

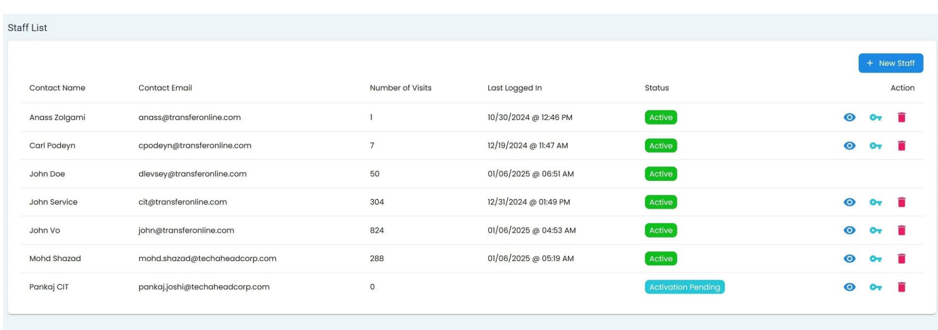


Fig. 133: Staff List Overview

Staff Table Columns

The staff table displays the following columns:

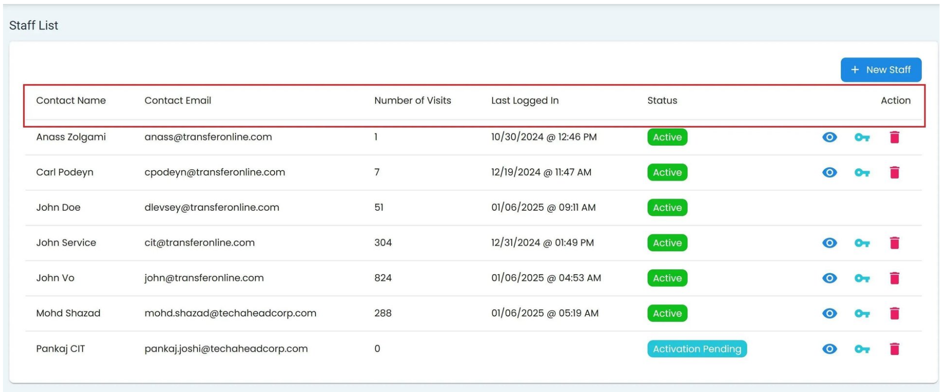


Fig. 134: Staff Table Column Headers

Column Descriptions

- **First Name** Staff member's first name
- **Last Name** Staff member's last name
- **Email** Staff member's email address
- **Status** Current status of the staff account
- **Action** Available actions for the staff member

Add New Staff

To add a new staff member, `click` the button.

Add Staff Dialog

The Add Staff dialog allows you to enter the new staff member's information:

Required Fields

- **First Name** Staff member's first name
- **Last Name** Staff member's last name
- **Email** Staff member's email address (used for login)

To cancel without adding a new staff member, `click` the button.

> **Note**
>
> New staff members will receive an email invitation to set up their account after being added.

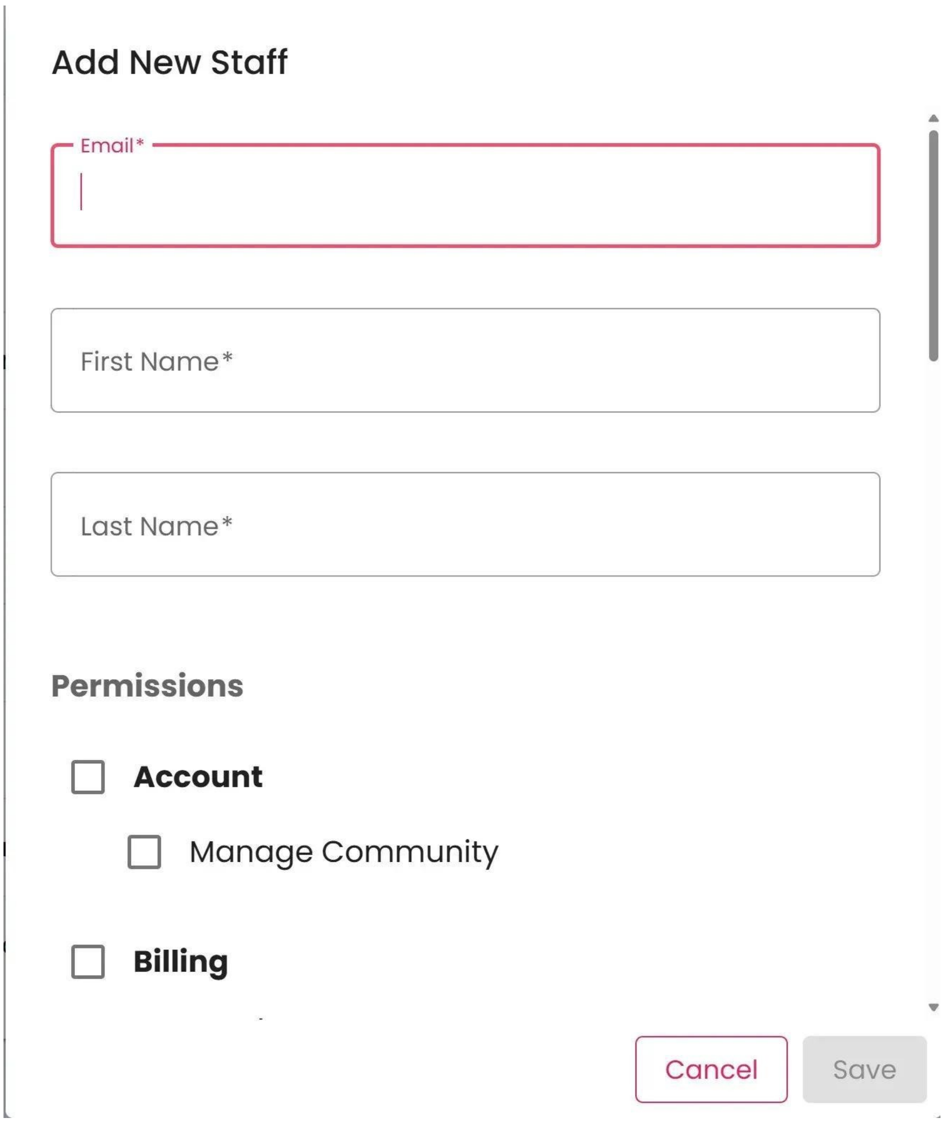


Fig. 135: Add Staff Button

Receive Notifications

The **Receive Notifications** settings allow community users to configure email notification preferences for their account.

Table of Contents

- *Save Changes*

Features: Receive Notifications

The **Receive Notifications** settings allow you to:

- View notification preferences
- Enable or disable notification types
- *Save notification settings*

Location

The **Receive Notifications** settings page is located in the **Settings** category in the **Primary Sidenavigation** menu.

Notifications Overview

The **Receive Notifications** page displays toggle switches for each notification type.

Note

Enable or disable notifications based on your preferences. Disabling a notification type means you will not receive emails for that category of events.

Notification Toggles

Use the toggle switches to enable or disable specific notification types.

Notification Types

Common notification categories include:

- **New Investor Activity** Notifications when new investors join
- **Document Updates** Notifications when documents are uploaded or changed
- **Transaction Alerts** Notifications for investment transactions
- **System Announcements** Important systemwide notifications

Save Changes

After configuring your notification preferences, click the button to apply your settings.

Tip

Review your notification settings periodically to ensure you receive important updates while avoiding notification overload.

Demographic Questions

The **Demographic Questions** settings allow community users to configure the demographic data collection questions presented to investors.

Table of Contents

Features: Demographic Questions

The **Demographic Questions** settings allow you to:

- View all demographic questions configured for your organization
- Filter questions by visibility status
- Reorder questions to change display order
- View question dependencies

Location

The **Demographic Questions** settings page is located in the ⊛ **Settings** category in the **Primary Sidenavigation** menu under .

Demographics Overview

The **Demographic Questions** page displays all configured demographic questions.

Question Categories

The demographic questions cover several categories of information:

Question Categories

- **Income** Questions about household income levels
- **Housing** Questions about rent or ownership status
- **Investment History** Previous investment experience
- **Address Information** Address verification questions
- **Household Composition** Family and household size information

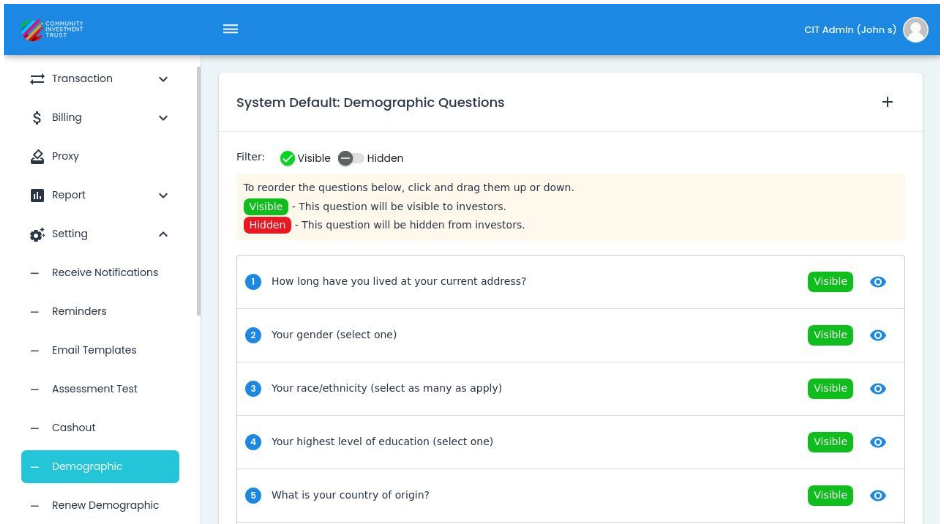


Fig. 136: Demographic Questions Page Overview

Filter by Visibility

Use the and switches to filter which questions are displayed in the list.

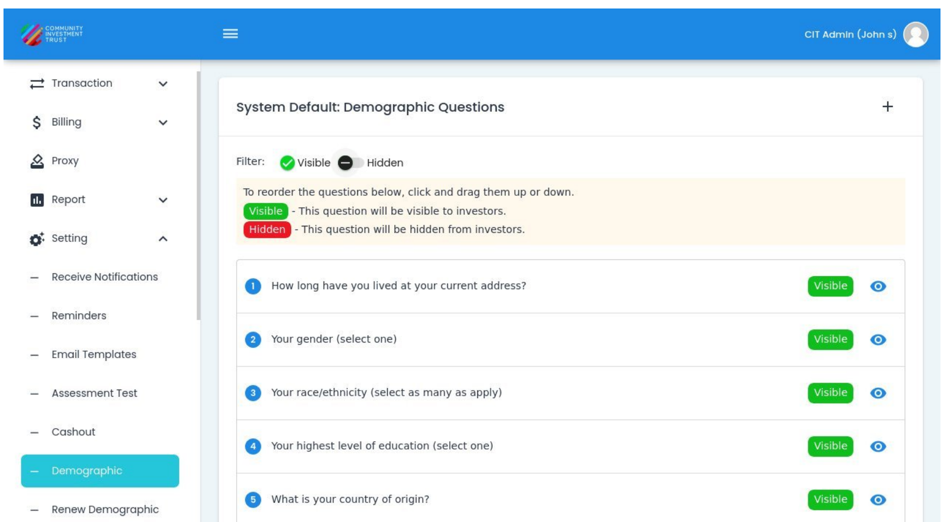


Fig. 137: Visible/Hidden Filter Switches

Reordering Questions

Questions can be reordered to change the order in which they appear to investors.

Note

Drag and drop questions to change their order. The order determines how questions are presented to investors during the demographic data collection process.

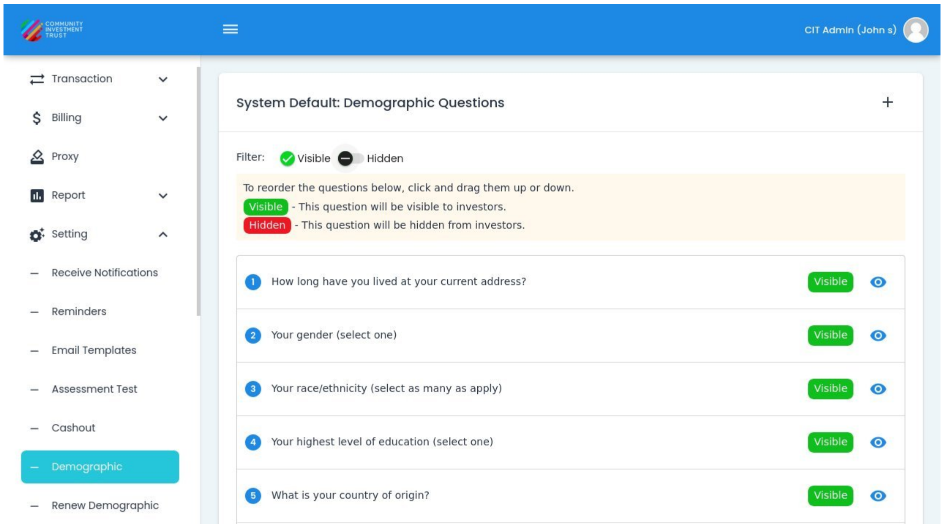


Fig. 138: Question Reordering Instructions

View Question Details

`Click` on a question in the list to view its configuration details.

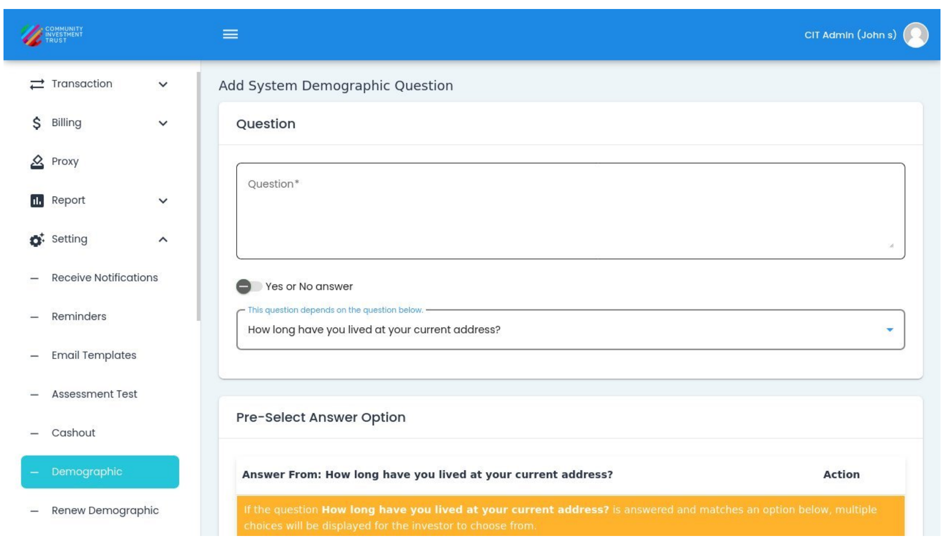


Fig. 139: Question Selected for Viewing

> **Tip**
>
> Demographic questions help collect important information about investors that may be required for regulatory compliance or program eligibility.

Renew Demographic Questions

The **Renew Demographic Questions** settings allow community users to configure the questions presented to investors when renewing their demographic information.

Table of Contents

Features: Renew Demographic Questions

The **Renew Demographic Questions** settings allow you to:

- View all renewal demographic questions
- Filter questions by visibility status
- View accordion panels for question sections
- Manage question order

Location

The **Renew Demographic Questions** settings page is located in the ⊛ **Settings** category in the **Primary Sidenavigation** menu under .

Renew Demographics Overview

The **Renew Demographic Questions** page displays all configured questions with their visibility status.

Question Accordion Panels

Questions are organized in accordion panels that can be expanded to view details.

Accordion Panel Sections

The accordion panels organize questions by category:

- **Income Questions** Questions about current income levels
- **Housing Questions** Questions about housing status
- **Investment Questions** Questions about investment updates
- **Household Questions** Questions about household changes

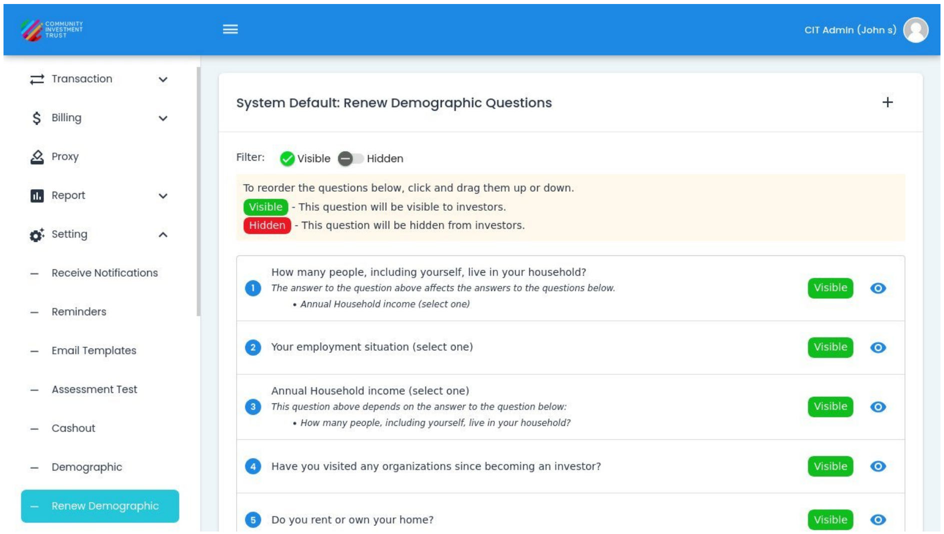


Fig. 140: Renew Demographic Questions Page Overview

Filter by Visibility

Use the and switches to filter which questions are displayed in the list.

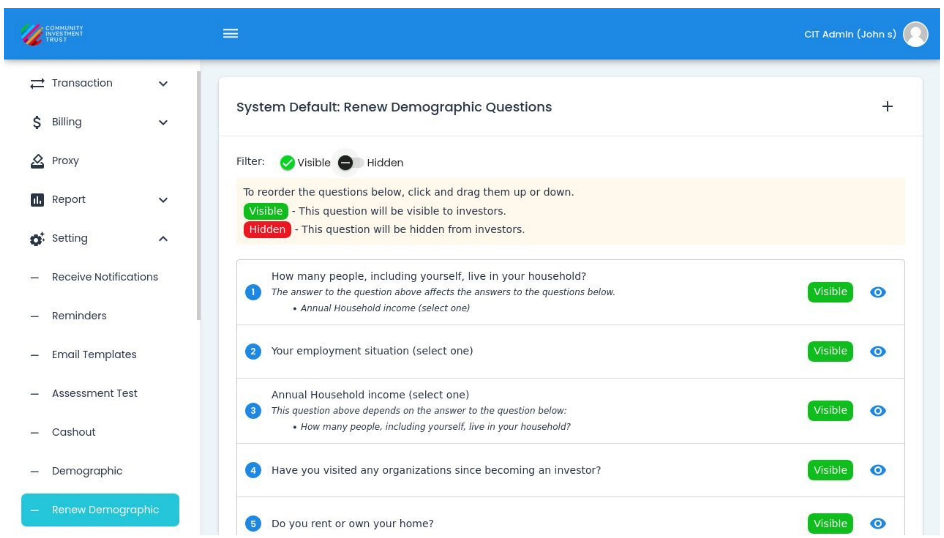


Fig. 141: Visible/Hidden Filter Switches

Reordering Questions

Questions can be reordered to change the order in which they appear during the renewal process.

View Question Details

`Click` on a question in the list to view its configuration.

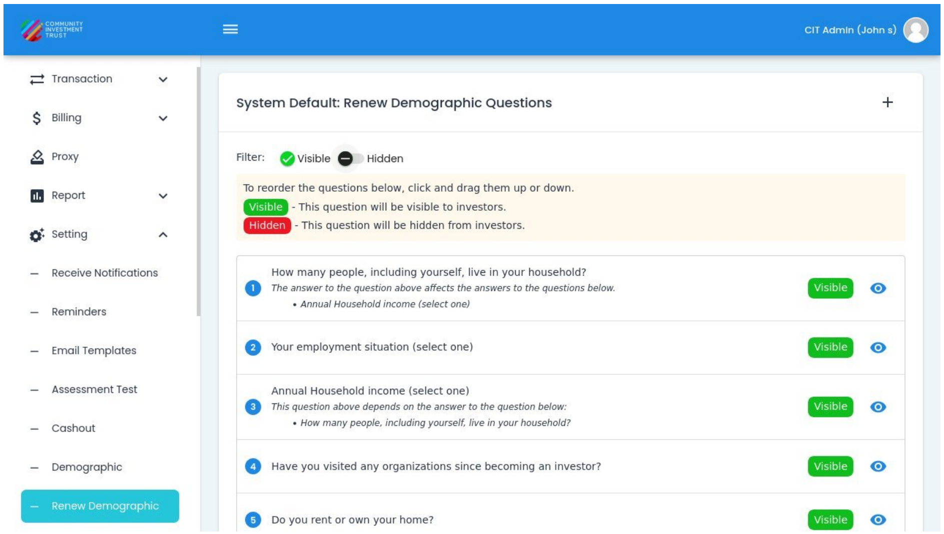


Fig. 142: Question Reordering Instructions

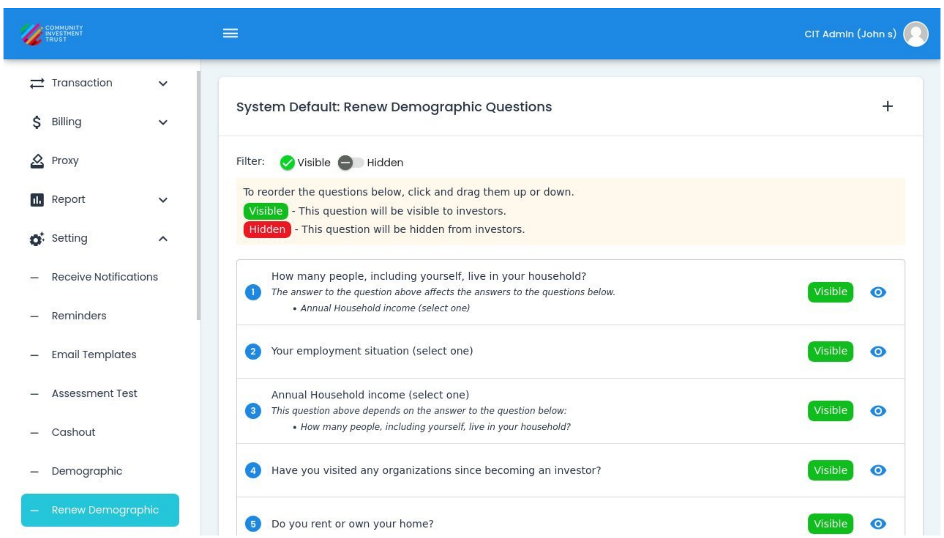


Fig. 143: Question Selected in List

> **Note**
>
> Renew demographic questions are presented to investors periodically to keep their demographic data up to date and ensure continued program eligibility.

Median Family Income (MFI)

The **Median Family Income (MFI)** settings allow community users to configure income thresholds for determining investor eligibility.

Table of Contents

Features: Median Family Income

The **Median Family Income** settings allow you to:

- View MFI thresholds for your community
- Configure income eligibility parameters
- Set household size adjustments
- Manage percentage thresholds

Location

The **Median Family Income (MFI)** settings page is located in the ⊛ **Settings** category in the **Primary Sidenavigation** menu under .

MFI Overview

The **Median Family Income** page displays the current MFI configuration for your community.

What is MFI?

Median Family Income (MFI) is a measure used to determine eligibility for community investment programs. It takes into account:

- Regional income levels
- Family/household size
- Percentage of median income thresholds

MFI Parameters

The following parameters can be configured:

MFI Configuration Options

- **Income** Base income threshold for the community
- **Family Size** Family size adjustments
- **Household Size** Household composition factors
- **Percentage** Percentage of MFI used for eligibility determination

Income Eligibility

MFI settings determine investor eligibility based on income relative to the median family income for the area.

Note

MFI thresholds may be updated periodically based on regional economic data. Contact your administrator if you have questions about current MFI settings.

I.12 Billing

The following **Sections** are included in the ▷ **Billing** category:

- *Invoices*
- *Payments*

Invoices

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

Table of Contents

Invoices Homepage

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

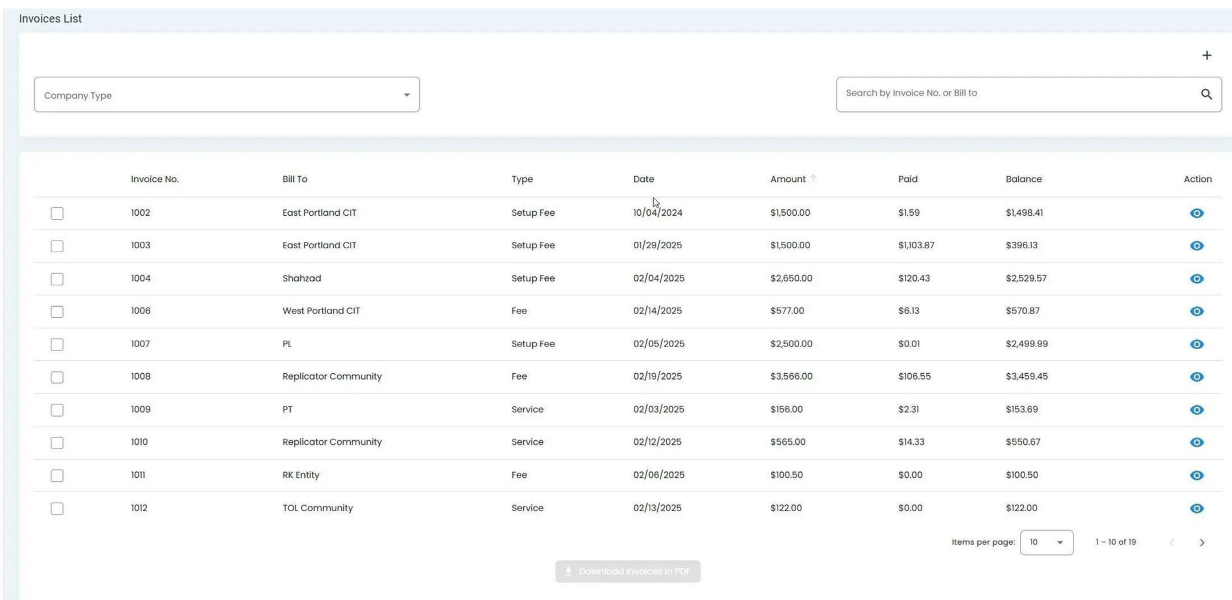


Fig. 144: Billing, Invoices, Homepage

Columns: Invoices List Table

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

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

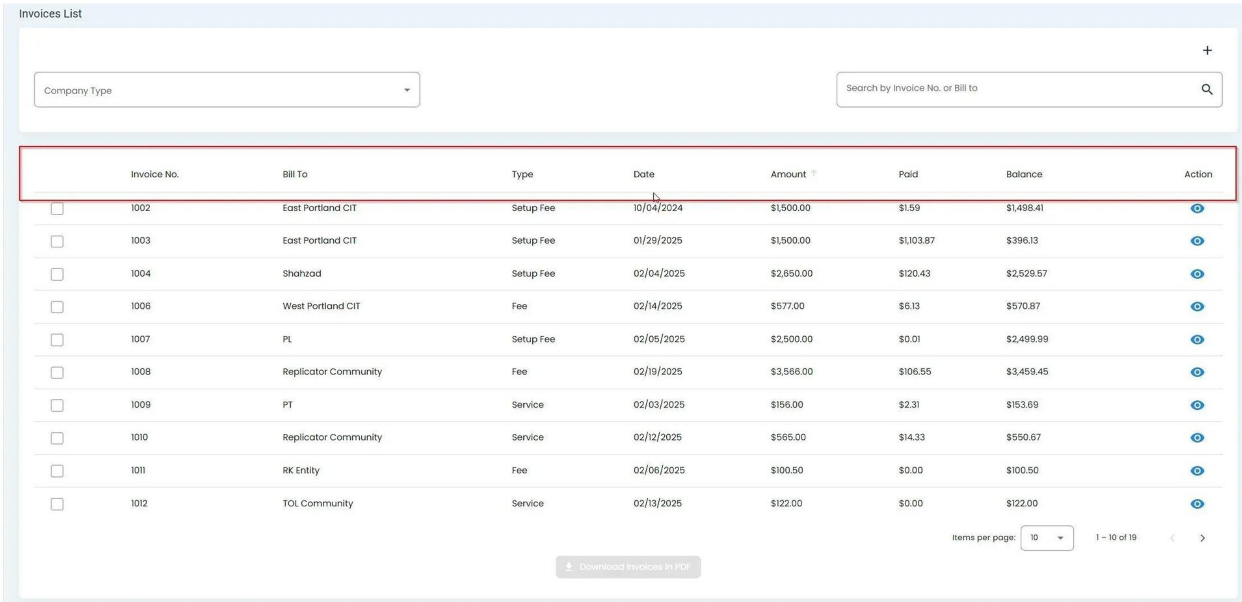


Fig. 145: Billing, Invoices, Columns Explained

- **Status**
- **Action**

How to Download Invoices in PDF

To download invoices in PDF format:

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

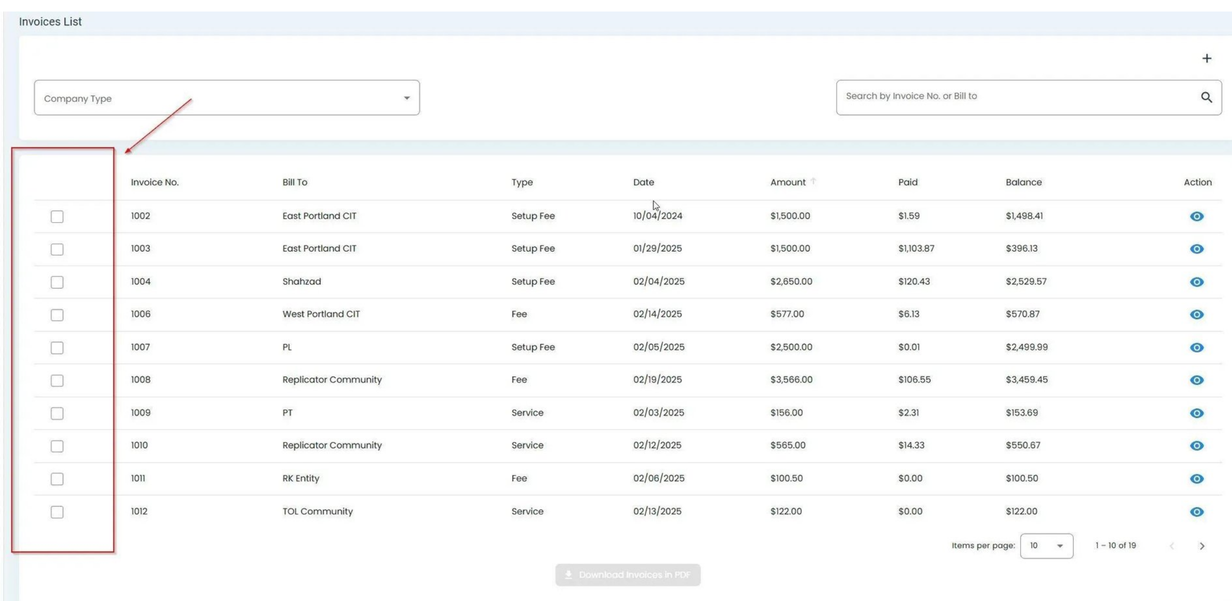


Fig. 146: Billing, Invoices, Selecting Invoices

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

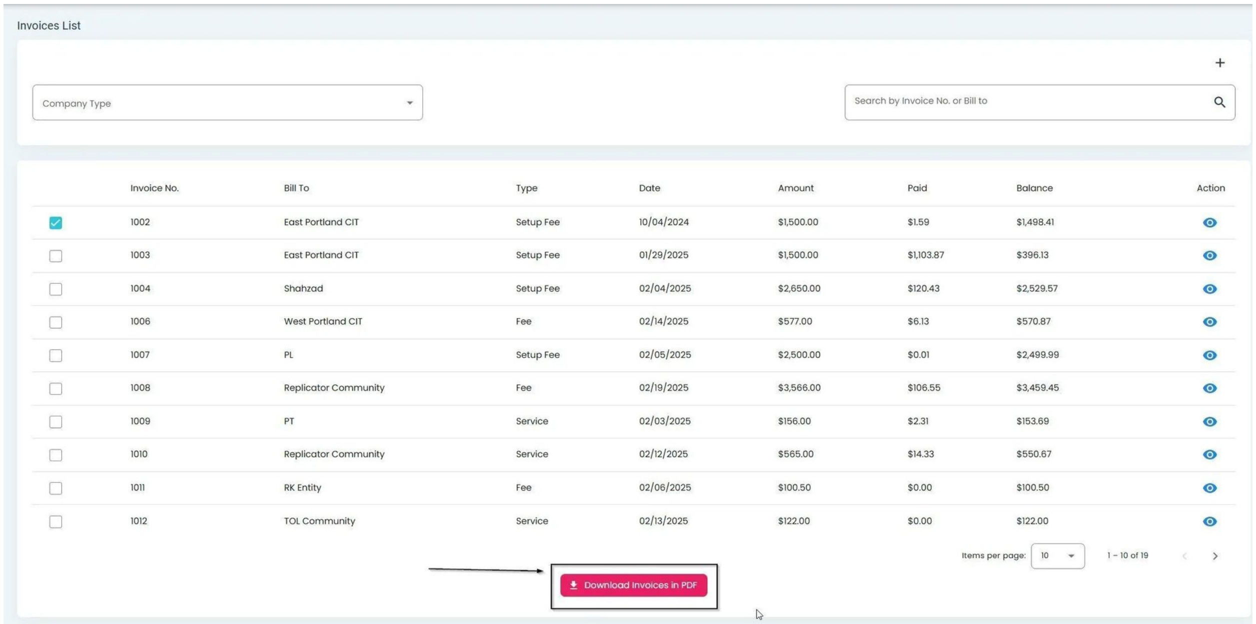


Fig. 147: Billing, Invoices, Download PDF Button

How to Add an Invoice

To add a new invoice:

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

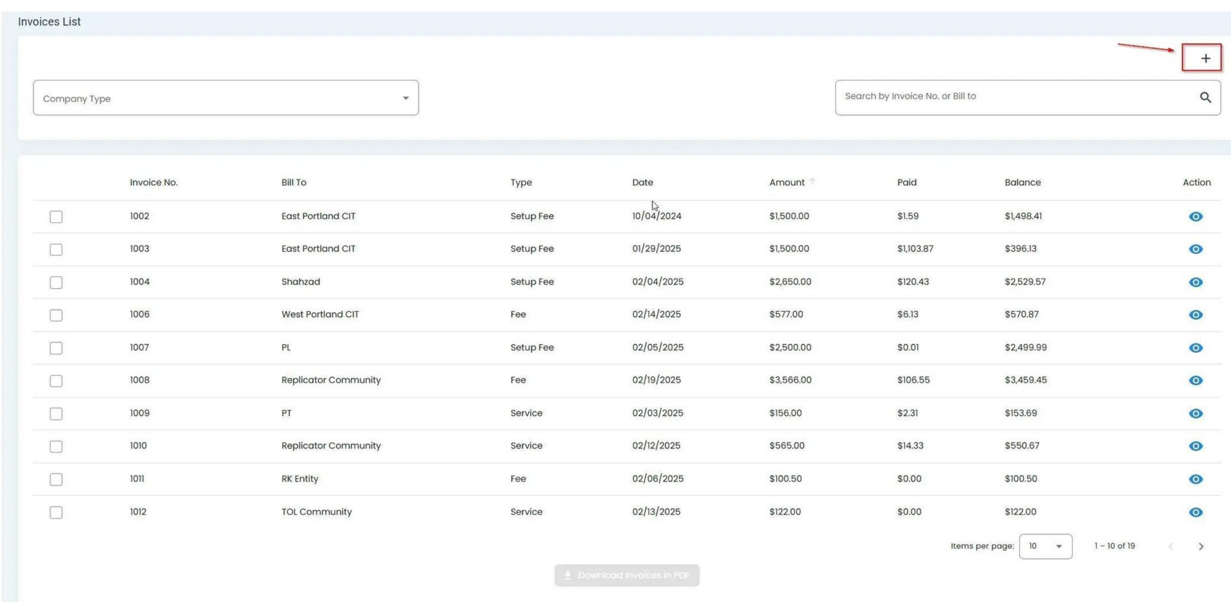


Fig. 148: Billing, Invoices, Add New Invoice Button

2. Fill out the invoice form:

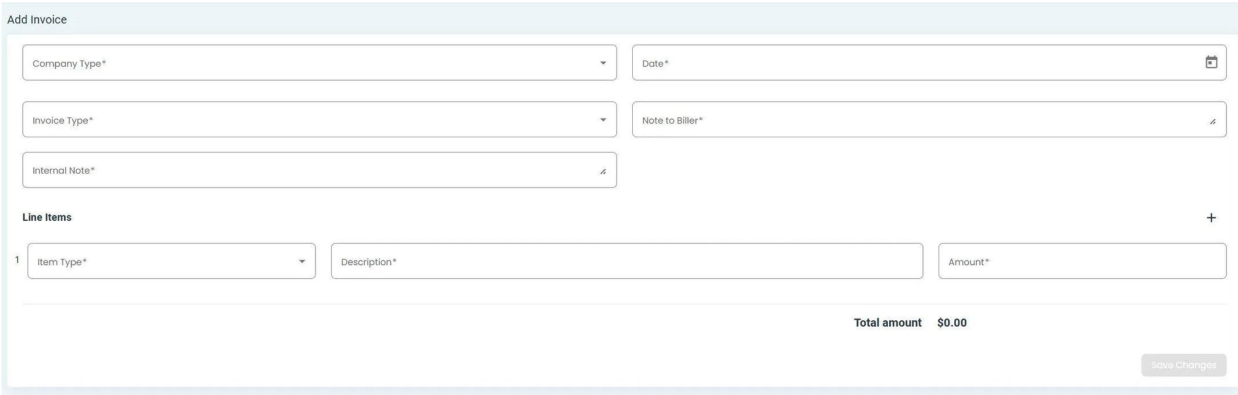


Fig. 149: Billing, Invoices, Add Invoice Form

Note

Reference to All fields are required item All fields are required for creating a new invoice.

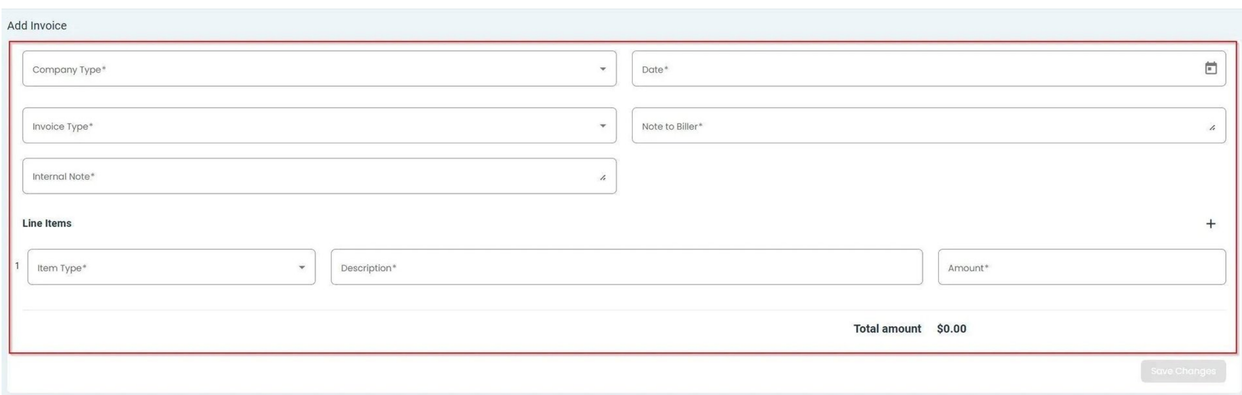


Fig. 150: Billing, Invoices, All Fields Required

3. Complete all required information (example):

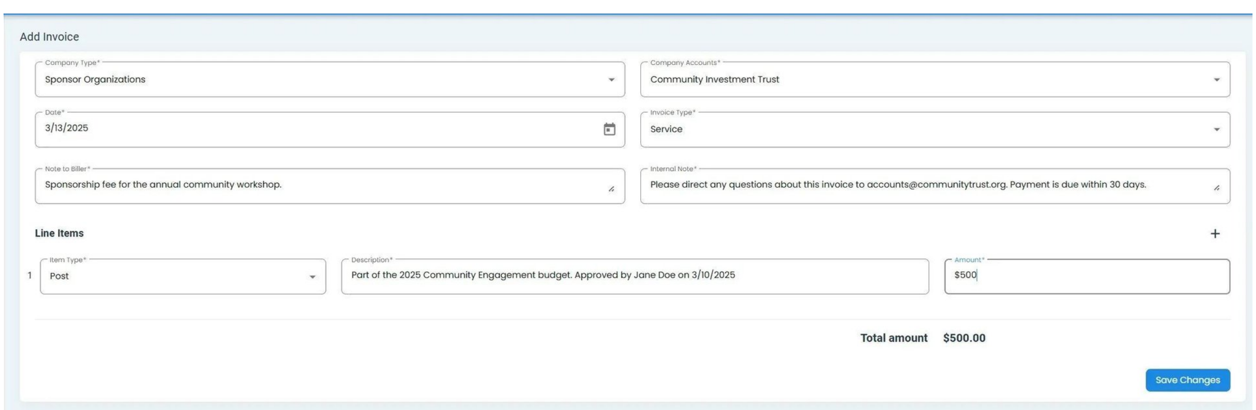


Fig. 151: Billing, Invoices, Example of Filled Out Form

How to Add New Line Items

You can add multiple line items to an invoice:

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

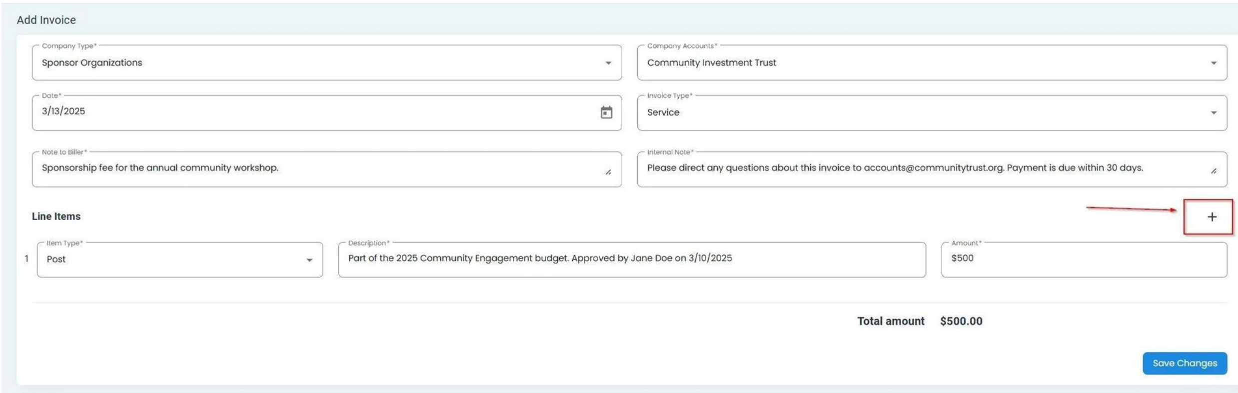


Fig. 152: Billing, Invoices, Add Line Item Button

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

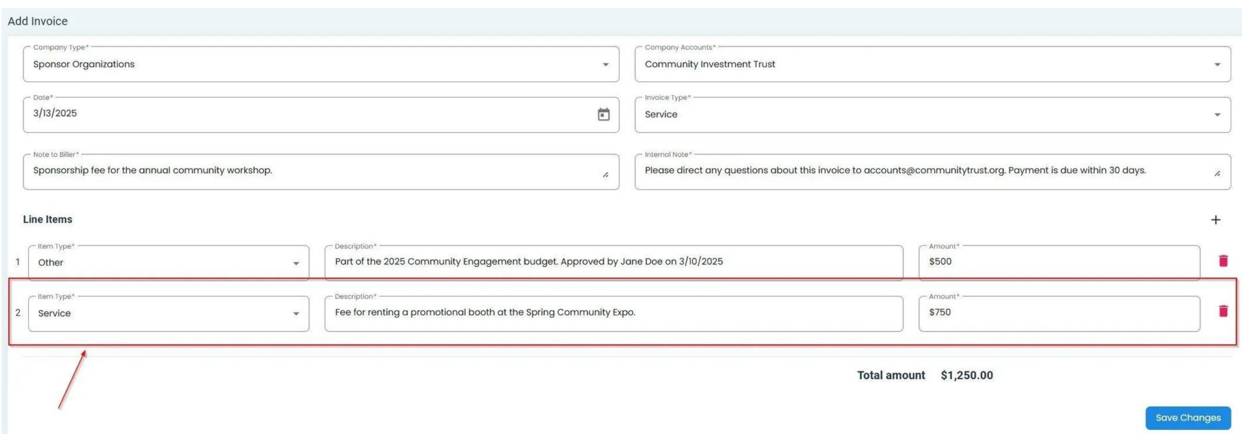


Fig. 153: Billing, Invoices, Second Line Item Added

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

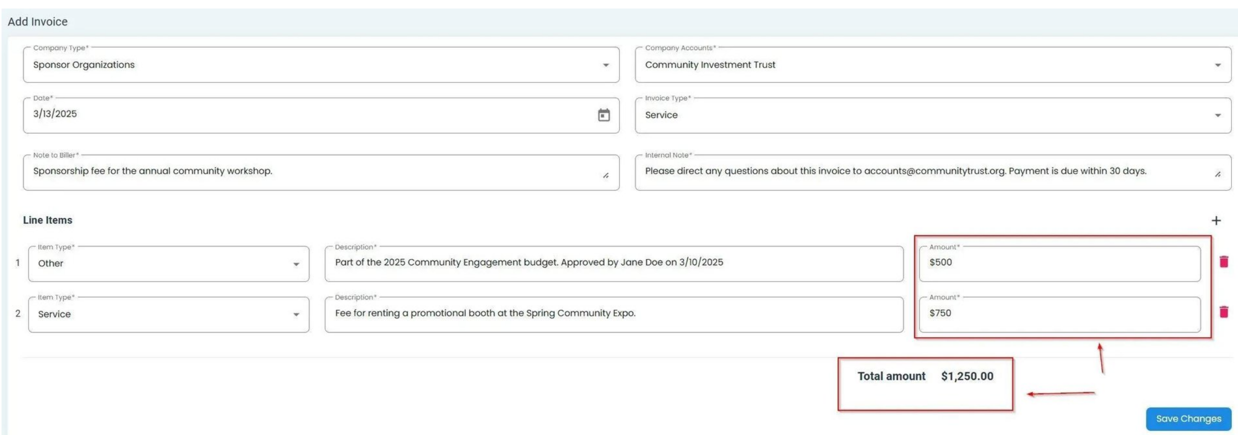


Fig. 154: Billing, Invoices, Total Updated with New Line Item

Payments

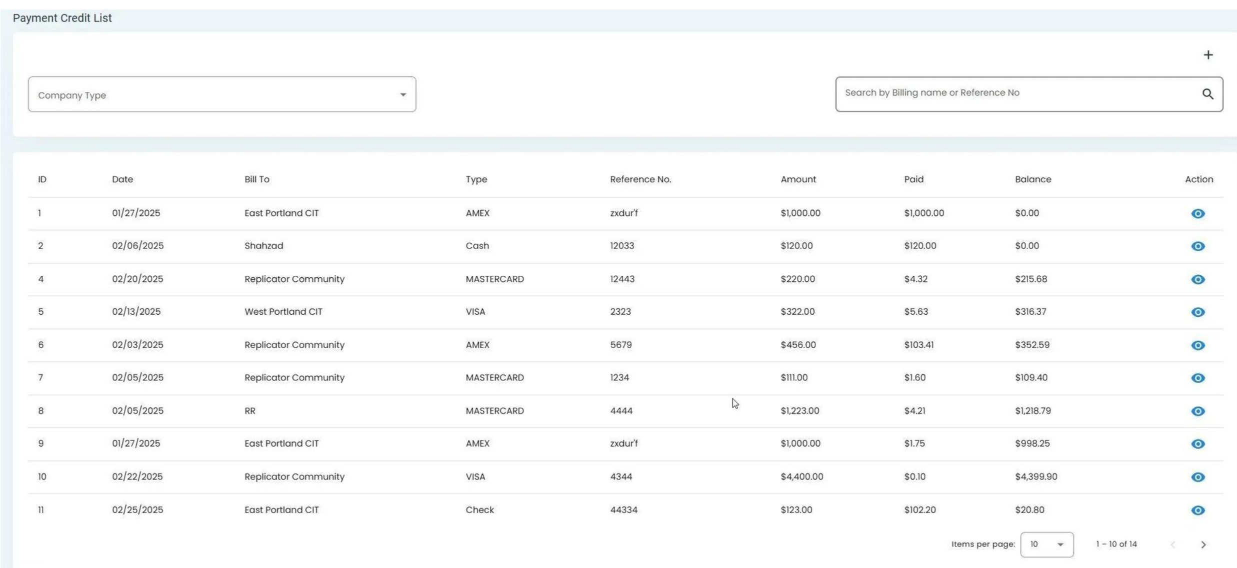
The **Payments** section provides tools for viewing and managing payment records within the system.

Features: Payments

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

Layout: Payments Homepage

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



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

Fig. 155: Payments Homepage showing the payment records table

Filtering Payments

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

Step 1: Locate the Filter Button

Find the filter button in the Payments table interface.

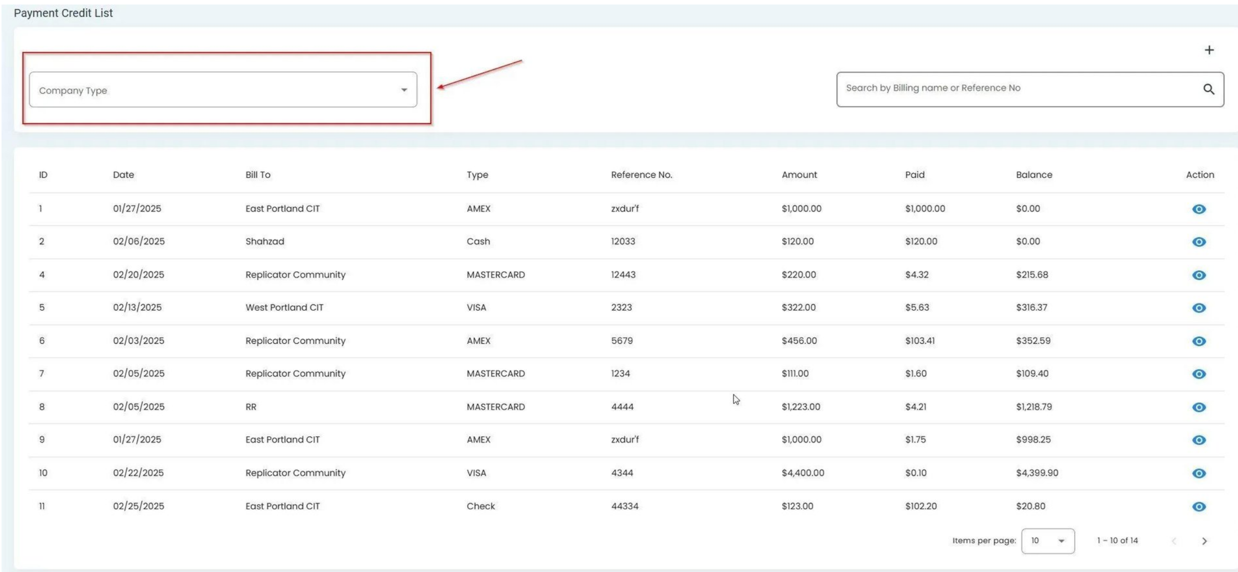


Fig. 156: Filter button location in the Payments table

Step 2: Select Filter Criteria

Click the filter button to expand the available filtering options.

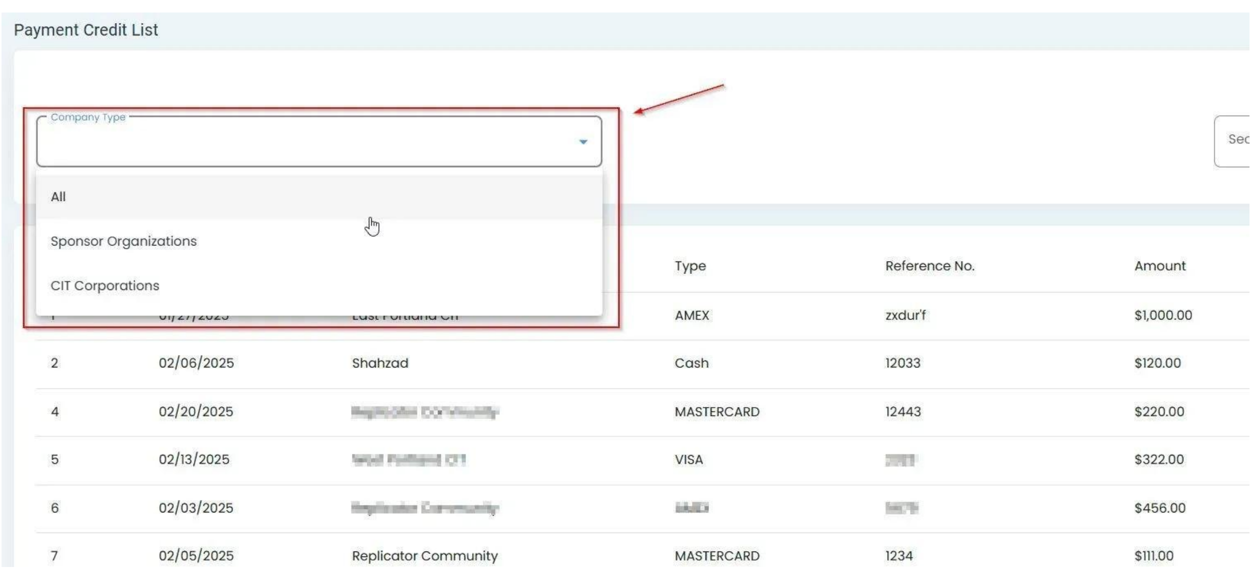


Fig. 157: Expanded filter options for the Payments table

Searching Payments

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

Step 1: Locate the Search Bar

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

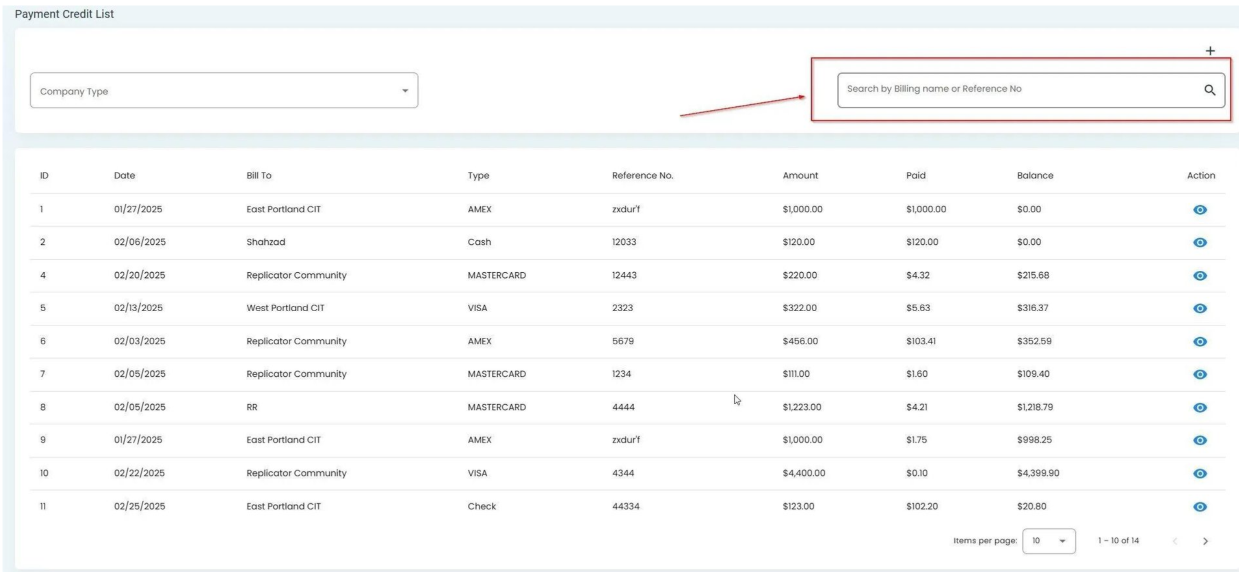
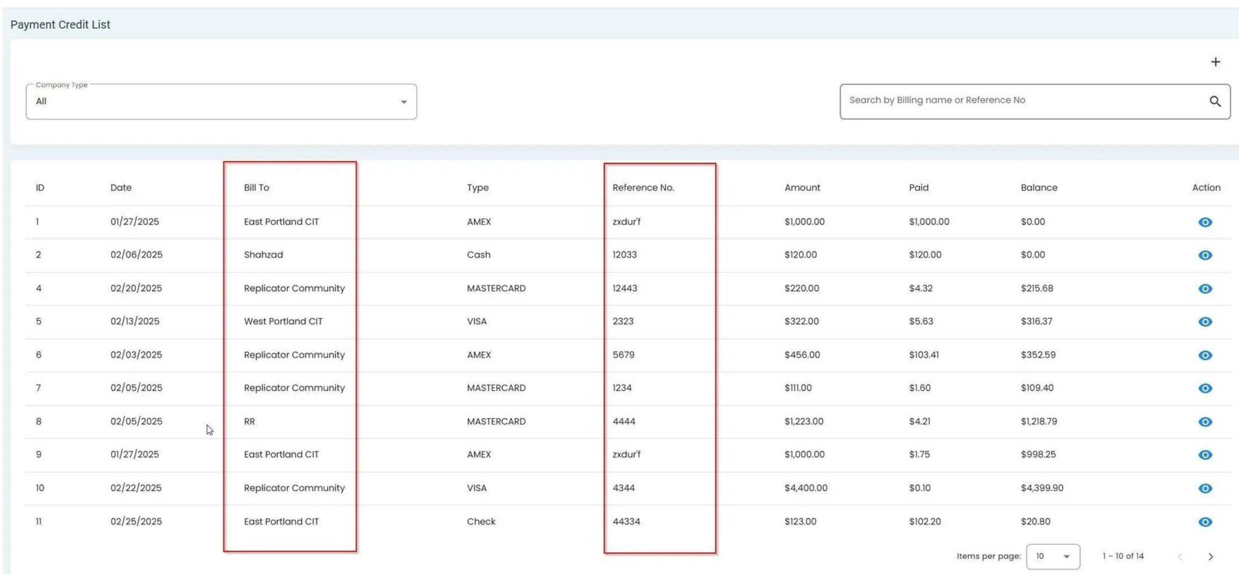


Fig. 158: Search bar location in the Payments interface

Step 2: Enter Search Terms

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

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



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

Fig. 159: Searchable columns in the Payments table

Additional Features

The Payments section includes additional features for managing payment information:

- View detailed payment information
- Add payment credits to accounts

Viewing Payment Details

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

Overview: Payment Details

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.

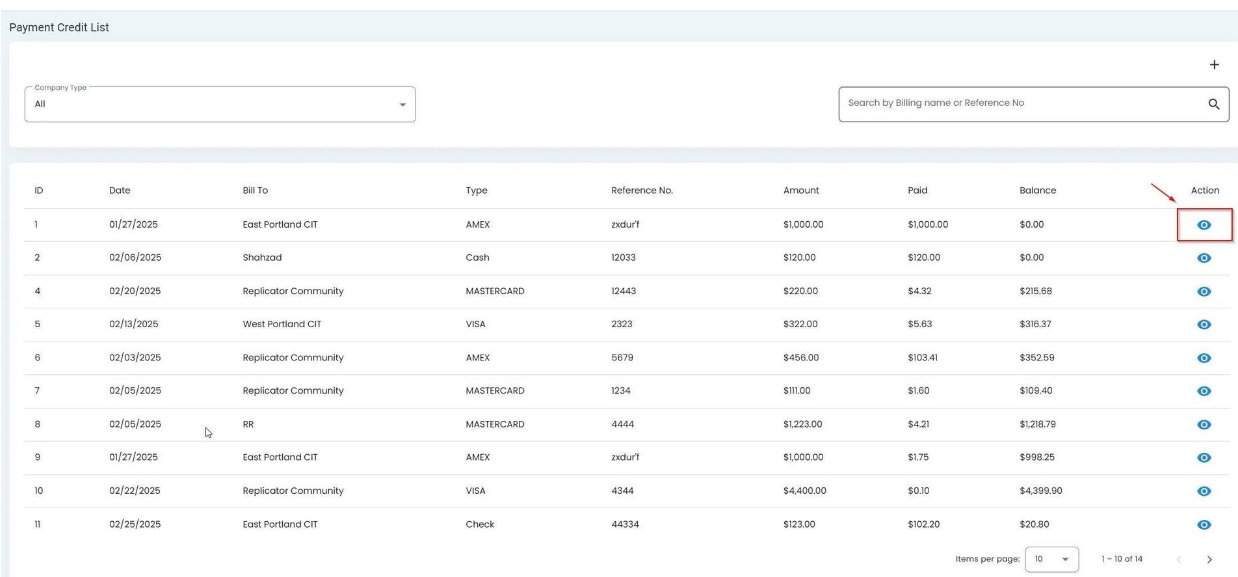


Fig. 160: Location of the View Details button in the Payments table

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.

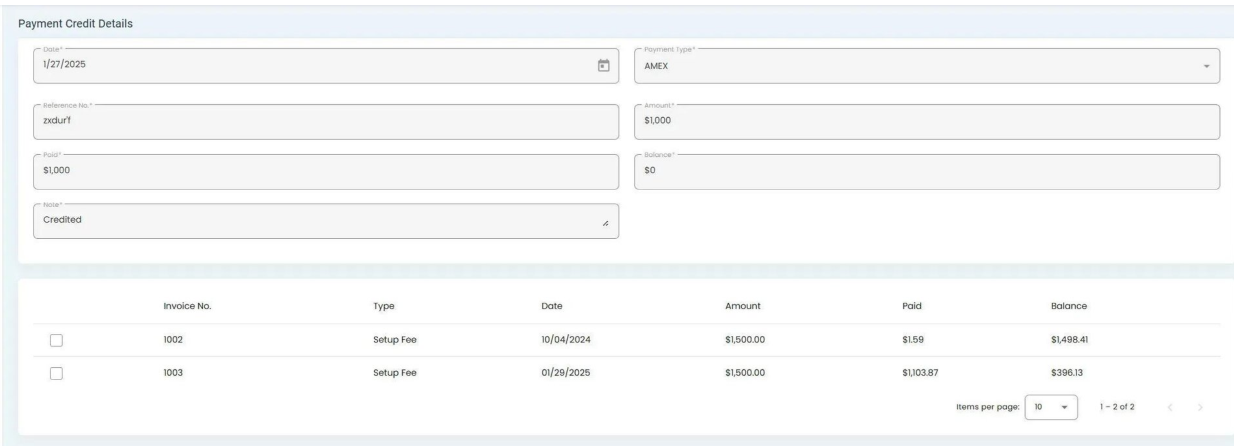


Fig. 161: Payment Details screen showing comprehensive payment information

Understanding the Payment Details

Quick Information Section

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

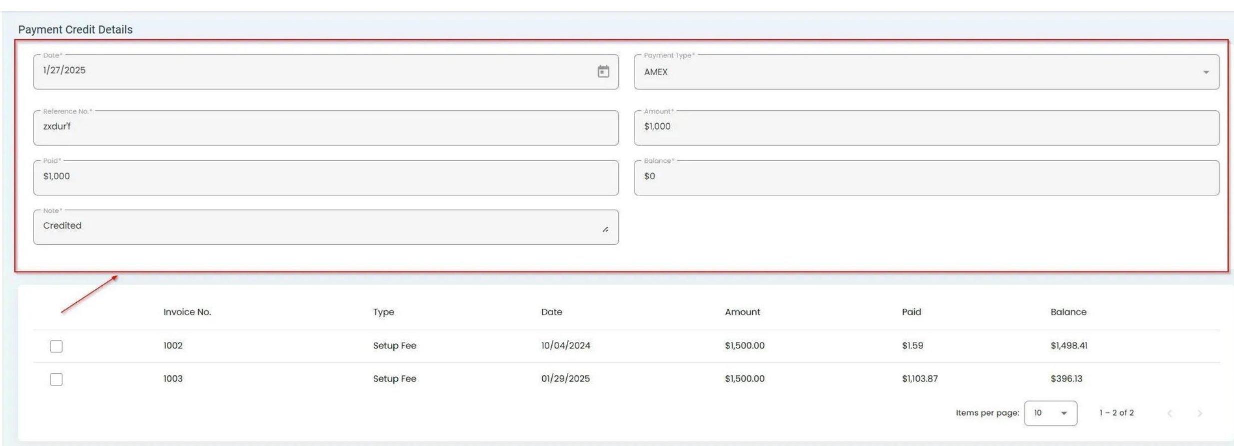


Fig. 162: Quick information section highlighted in the Payment Details screen

Detailed Columns

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

Summary

The Payment Details screen allows you to:

1. Access comprehensive information about individual payment records

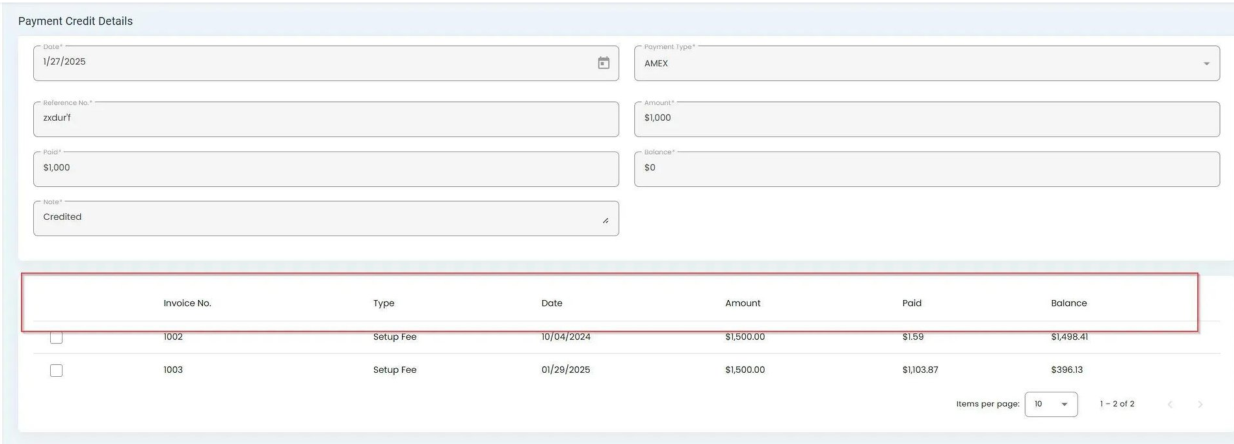


Fig. 163: Columns of information in the Payment Details screen

2. View payment transaction details
3. See associated account information
4. Check payment status and history

Adding Payment Credits

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

Overview: Payment Credits

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.

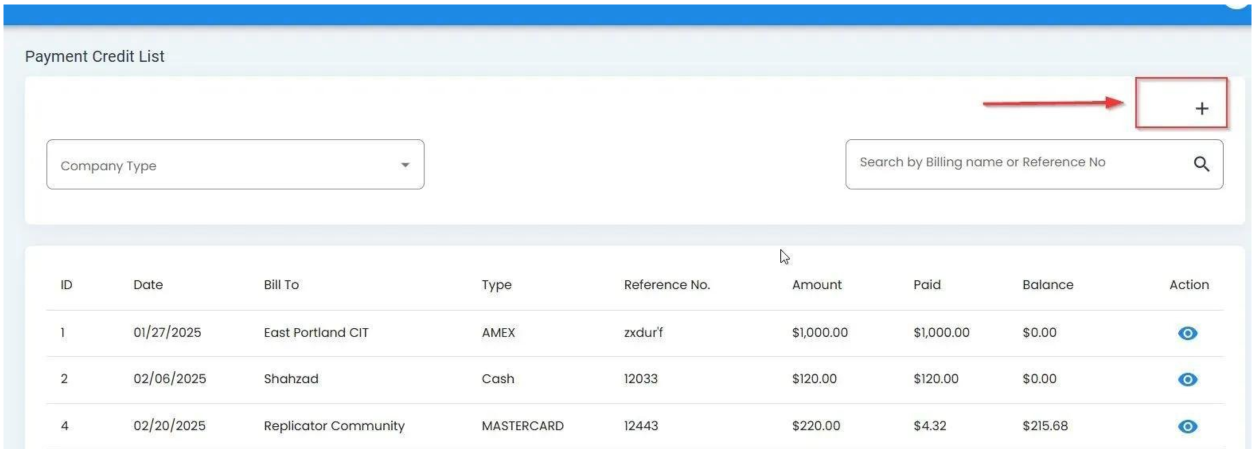


Fig. 164: Location of the Add Payment Credit button

Step 2: Access the Add Payment Credit Form

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

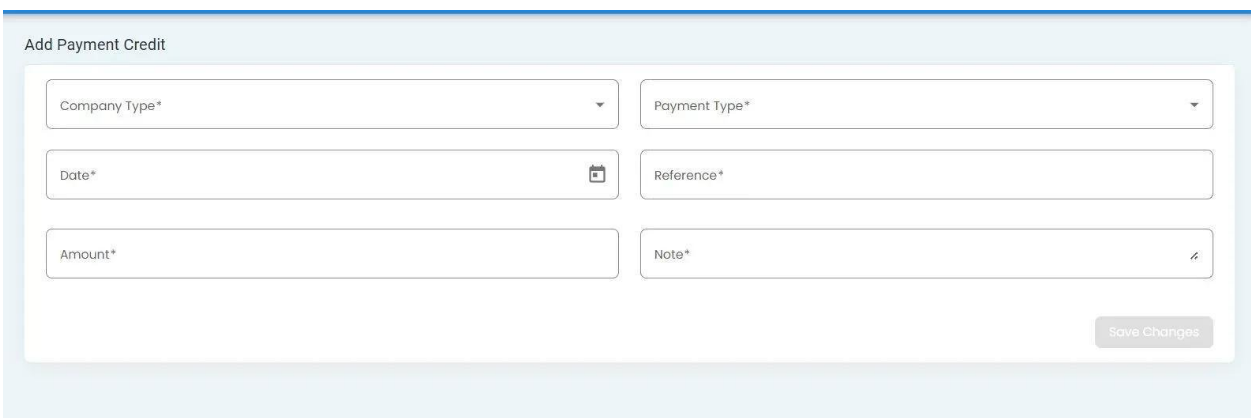


Fig. 165: The Add Payment Credit form

> **Note**
>
> All fields in the Add Payment Credit form are required.

Step 3: Select Company Type

Choose the appropriate company type from the dropdown menu.

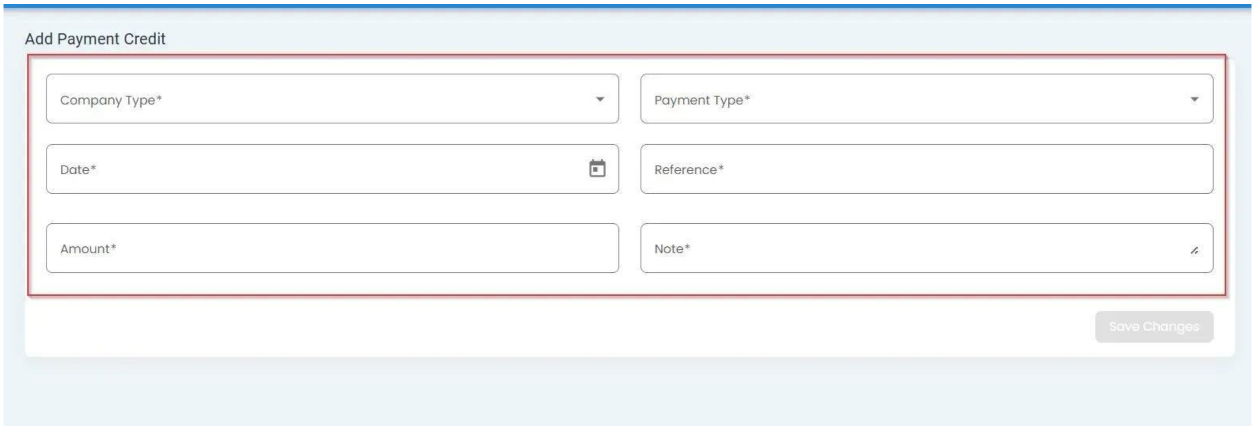


Fig. 166: All fields are required in the Add Payment Credit form

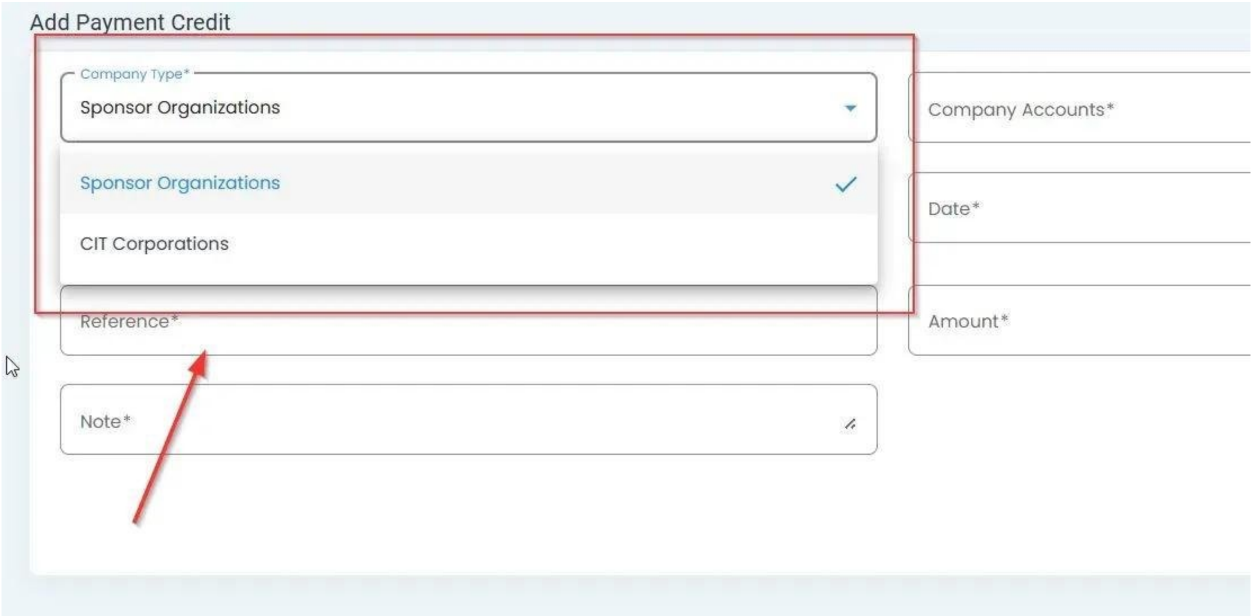


Fig. 167: Selecting the company type in the Add Payment Credit form

Step 4: Select Company Account

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

Step 5: Select Payment Type

Choose the appropriate payment type from the available options.

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.

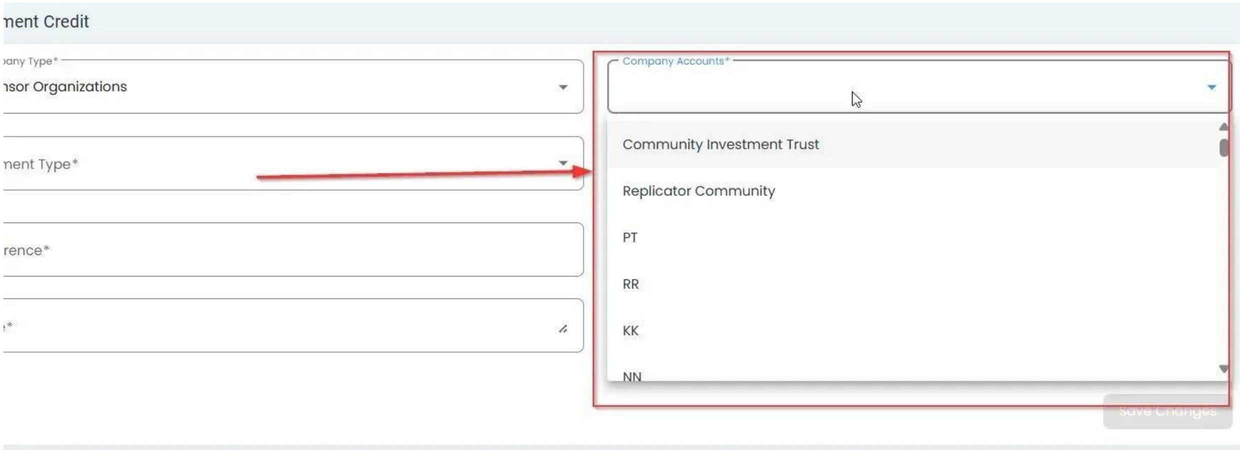


Fig. 168: Selecting the company account in the Add Payment Credit form

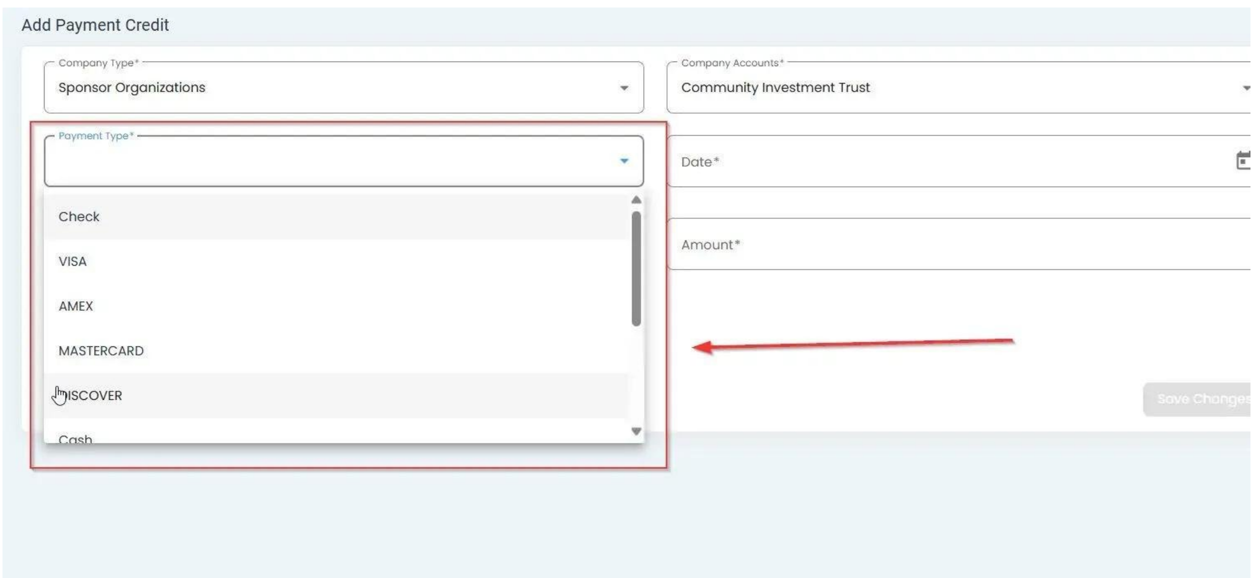


Fig. 169: Selecting the payment type in the Add Payment Credit form

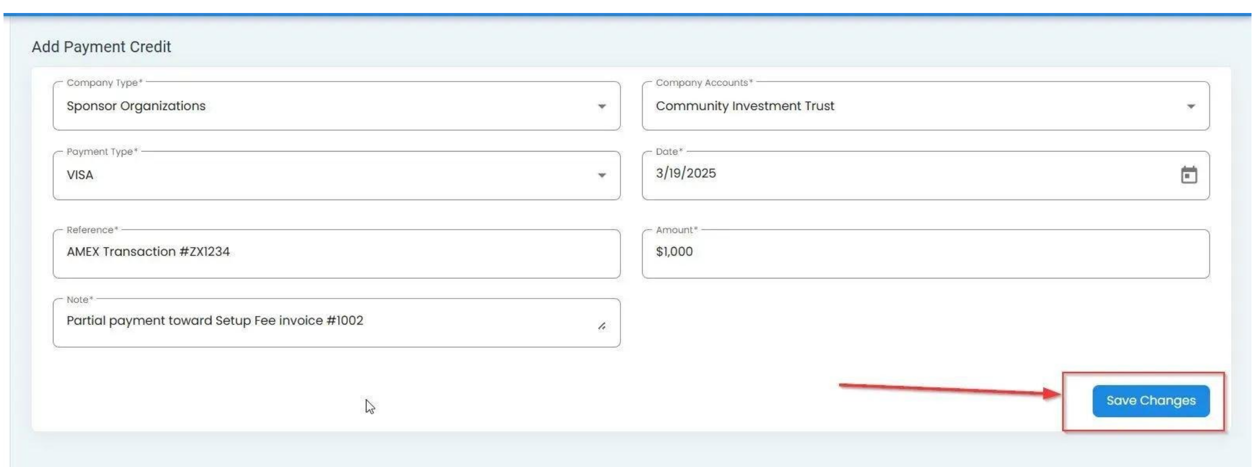


Fig. 170: Filling out the fields and clicking Save to complete the process

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.

I.13 Communication

The **Communication** section allows community users to manage messaging and notifications with shareholders.

Table of Contents

Features: Communication

The **Communication** section allows you to:

- *View and send messages to shareholders*
- Filter messages by CIT Corporation and status
- *Reply to messages*
- *Send email notifications to shareholders*

Communication Sections

Messages

View, filter, and respond to messages from shareholders and other users. The Messages section organizes communications by read/unread status and allows filtering by CIT Corporation.

Send Notification

Send email notifications to active shareholders. Select the notification category, type, compose your message, and optionally send a test notification before sending to all recipients.

Messages

The **Messages** section allows you to view and send communications to shareholders and other users.

Table of Contents

Features: Messages

The **Messages** section allows you to:

- *View messages from users*
- Filter messages by CIT Corporation
- *View unread and read messages*
- *View message details*
- *Reply to messages*
- *Compose new messages*

Location

The **Messages** section is located under the ▹ **Communication** category in the **Primary Sidenavigation** menu.

Messages Overview

The **Messages** page displays messages organized by read/unread status.

Filter by CIT Corporation

Filter messages to show only those related to a specific CIT Corporation.

1. Locate the dropdown at the top of the page.
2. Select a CIT Corporation from the dropdown.

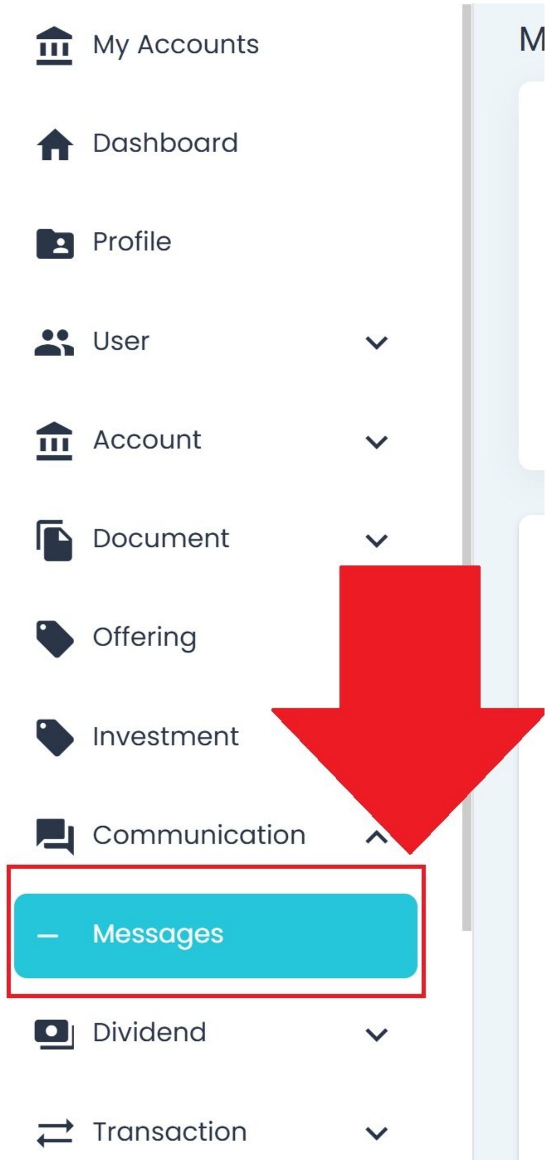


Fig. 171: Messages Section Navigation Location

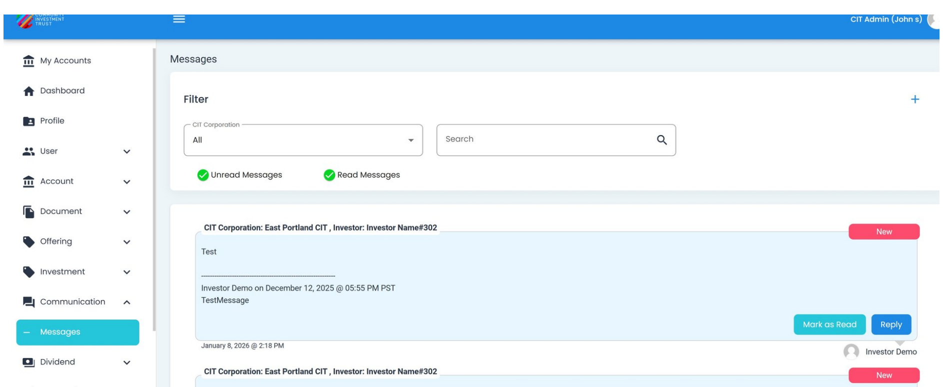


Fig. 172: Messages Section Overview

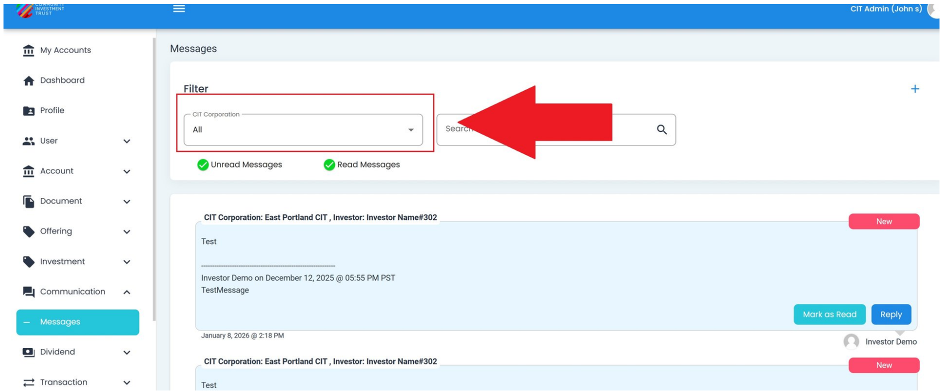


Fig. 173: CIT Corporation Filter Dropdown

Filter by Read/Unread Status

Toggle between viewing unread and read messages.

Unread Messages

The **Unread Messages** section displays messages you have not yet read.

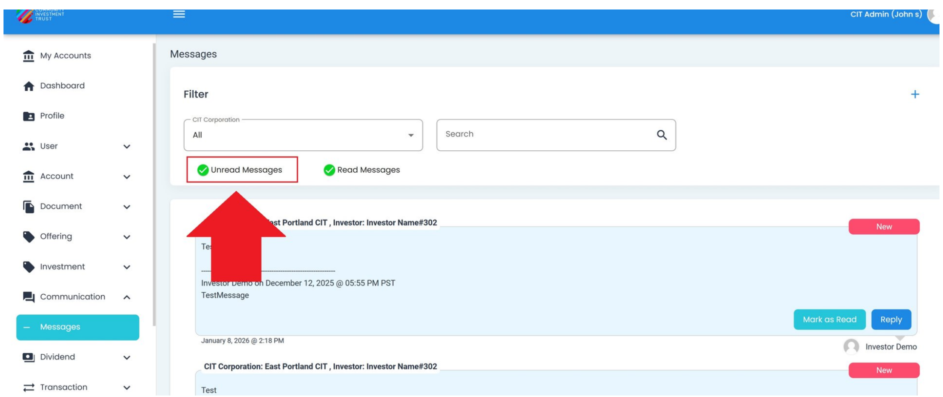


Fig. 174: Unread Messages Section

Read Messages

The **Read Messages** section displays messages you have already viewed.

Message Detail

Click on a message row to view the full message details.

Reply to Message

To reply to a message:

1. Click the button on the message.
2. Enter your message in the text field.

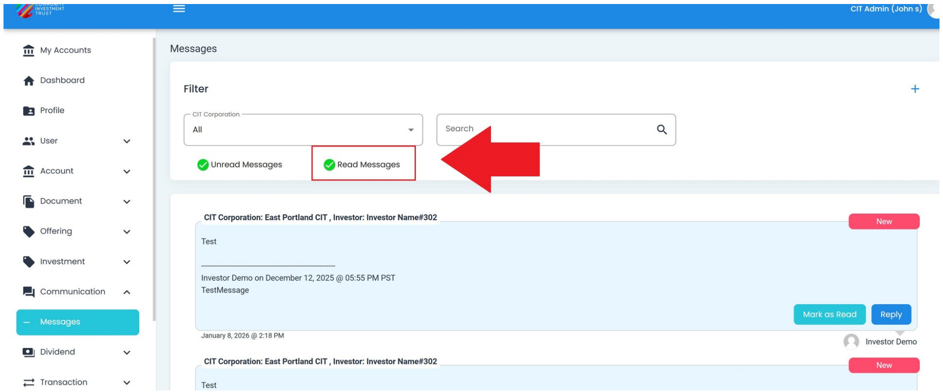


Fig. 175: Read Messages Section

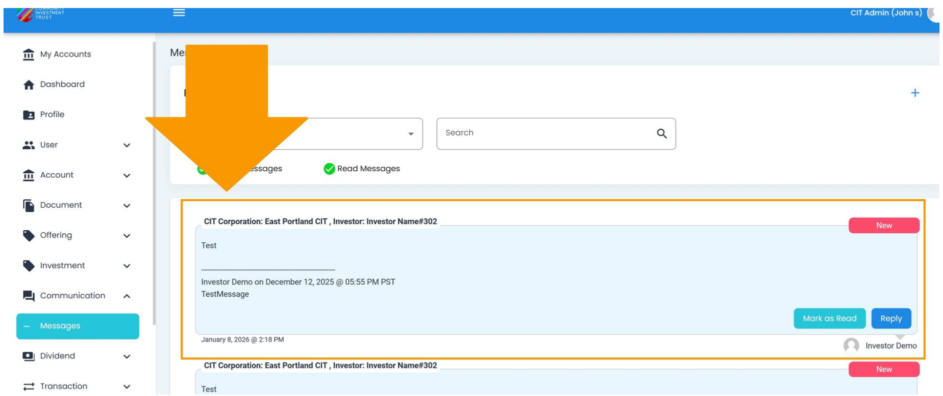


Fig. 176: Message Detail View

3. Click to send the reply, or to close without sending.

> **Note**
>
> Clicking Cancel closes the dialog without sending any message.

Compose New Message

To send a new message:

1. Click the or button.
2. The Send Message dialog opens with the following fields:

Message Form Fields

- **Subject** Enter the message subject
- **Message** Enter the message content

3. Click to send the message, or to close without sending.

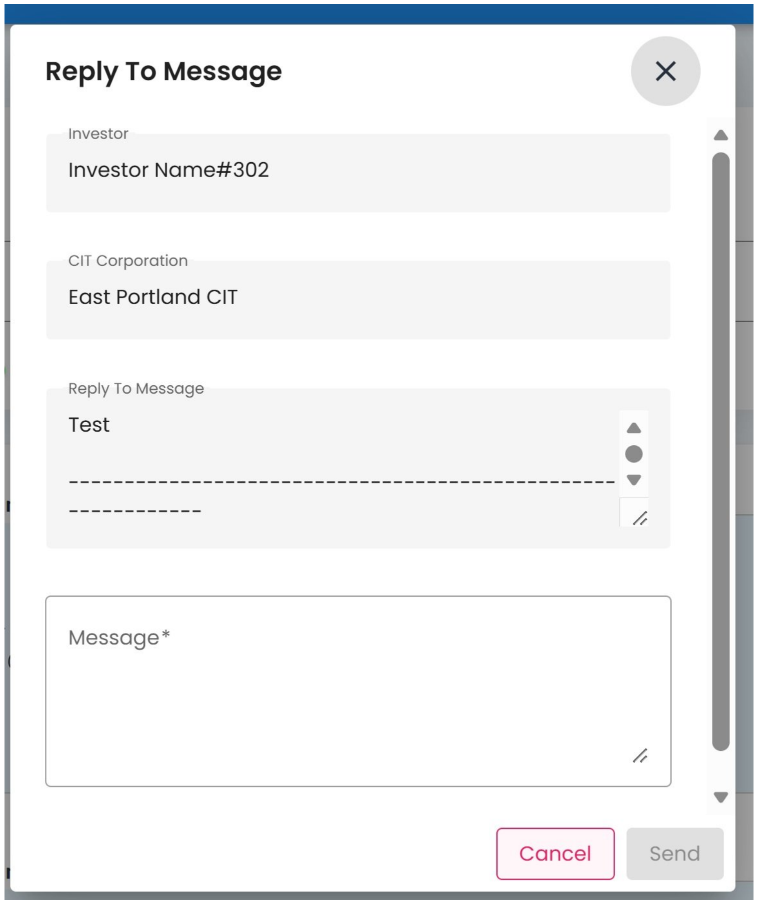


Fig. 177: Reply Dialog

Send Notification

The **Send Notification** feature allows community users to send email notifications to shareholders.

Table of Contents

Features: Send Notification

The **Send Notification** feature allows you to:

- Send email notifications to shareholders
- *Select notification category*
- *Choose notification type*
- *Compose notification content*
- *Send test notifications*

Location

The **Send Notification** page is located under the ▷ **Communication** category in the **Primary Sidenavigation** menu.

Category Selection

Select a category from the dropdown to determine who will receive the notification.

Category Options

- **Select** Default option (no category selected)
- **Active Shareholders** Send to all active shareholders

Type Selection

Select the notification type from the dropdown.

Type Options

- **Email** Send notification via email

Compose Notification

Enter the notification content using the following fields:

Subject Field

Enter the subject line for the notification in the text field.

Message Field

Enter the notification message in the text field.

Tip

Keep notification subjects clear and concise. Include all relevant details in the message body.

Send Test Notification

Before sending to all recipients, you can send a test notification to yourself:

Click the button to receive a test notification at your email address.

Note

Use the test feature to verify the notification content and formatting before sending to shareholders.

Sending the Notification

After composing and testing your notification:

1. Verify the category, type, subject, and message are correct.
2. Click the button to send the notification to all selected recipients.

Warning

Notifications cannot be recalled once sent. Always use the test feature to verify content before sending.

I.14 Proxy

The **Proxy** section allows community users to manage proxy voting records and related documentation.

Table of Contents

Features: Proxy

The **Proxy** section allows you to:

- *View the Proxy List*
- *Filter by Sponsor Organization*
- *Filter by CIT Corporation*
- *Search for proxies*
- *View proxy details*
- *Add new proxy records*

Location

The **Proxy** section is located in the **Primary Sidenavigation** menu.

Proxy List Overview

The **Proxy List** displays all proxy records for your organization.

Filtering the Proxy List

Use the filter dropdowns to narrow down the proxy list.

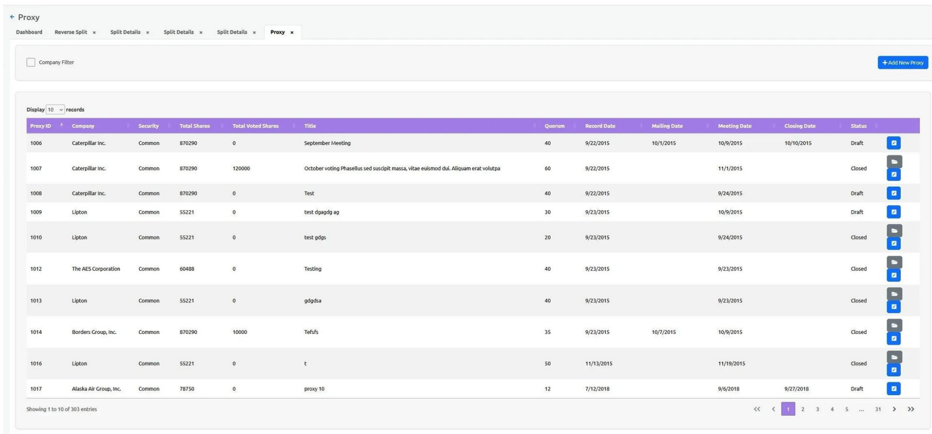


Fig. 178: Proxy List Overview

Filter by Sponsor Organization

Select a Sponsor Organization from the dropdown to filter proxies.

1. Open the dropdown.
2. Select an organization (e.g., "Community Investment Trust").

Filter by CIT Corporation

Select a CIT Corporation from the dropdown to further filter proxies.

1. Open the dropdown.
2. Select a corporation (e.g., "East Portland CIT").

Search Functionality

Use the search field to find specific proxies by ID or title.

1. Locate the search field with placeholder text "Search by Proxy Id or Title".
2. Enter your search term.
3. Results will filter automatically based on your search.

Tip

You can search by partial Proxy ID or title to find matching records quickly.

View Proxy Details

Click on a proxy record to view its detailed information.

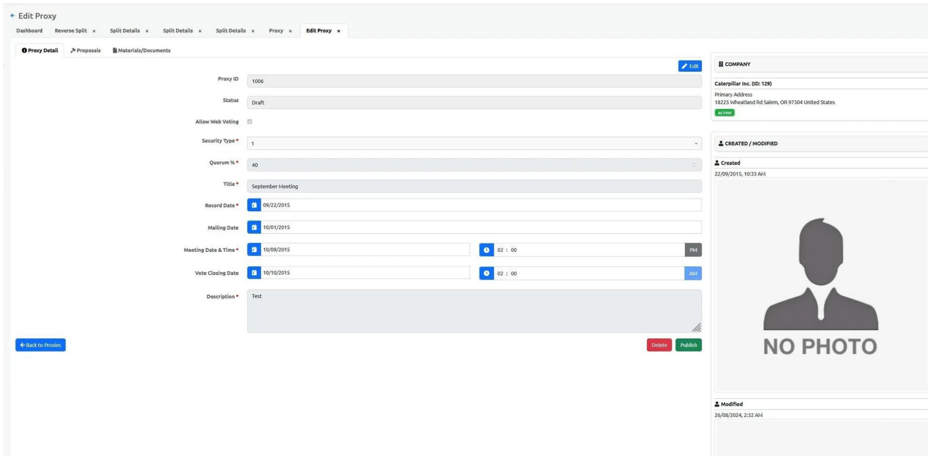


Fig. 179: Proxy Details View

Proxy Proposals

View proposals associated with the proxy:

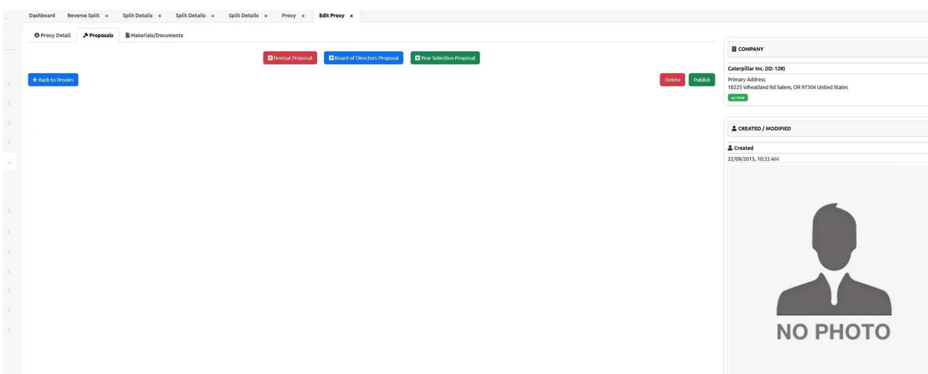


Fig. 180: Proxy Proposals

Proposal Details

Click on a proposal to view its details:

Proxy Documents

View documents associated with the proxy:

Add New Proxy

To add a new proxy record:

1. Click the button.
2. Fill in the proxy details:

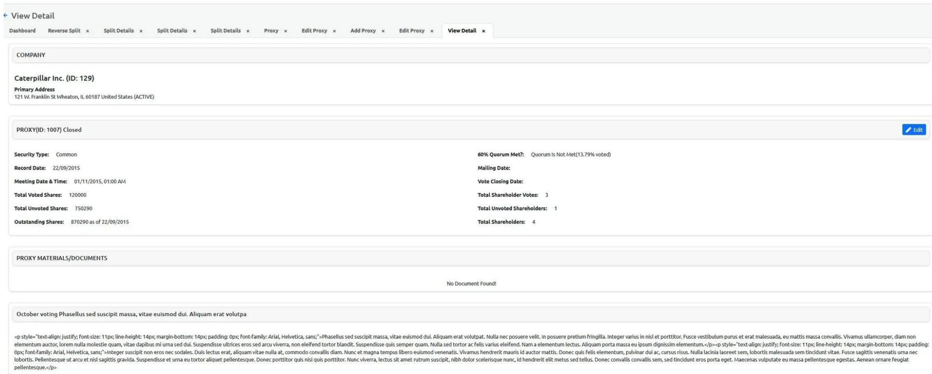


Fig. 181: Proposal Details

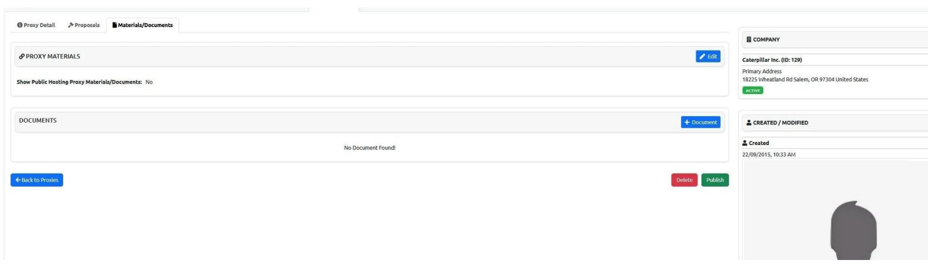


Fig. 182: Proxy Documents

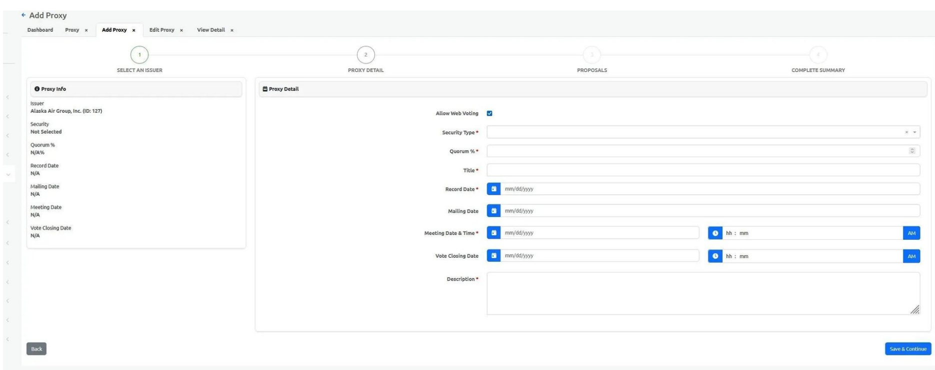


Fig. 183: Fill In Proxy Detail

Note

After adding a proxy, you can add proposals and documents to complete the proxy record.

I.15 Report

The **Report** section provides tools for generating and downloading various reports related to your community investments.

Table of Contents

Features: Report

The **Report** section allows you to:

- *Generate shareholder list reports*
- *View issuer balance summaries*
- *Generate transaction list reports*
- *View demographic data reports*
- *Compare demographics across time periods*
- *View cashout reason statistics*
- *View assessment test results*

Location

The **Report** section is located in the **Primary Sidenavigation** menu:

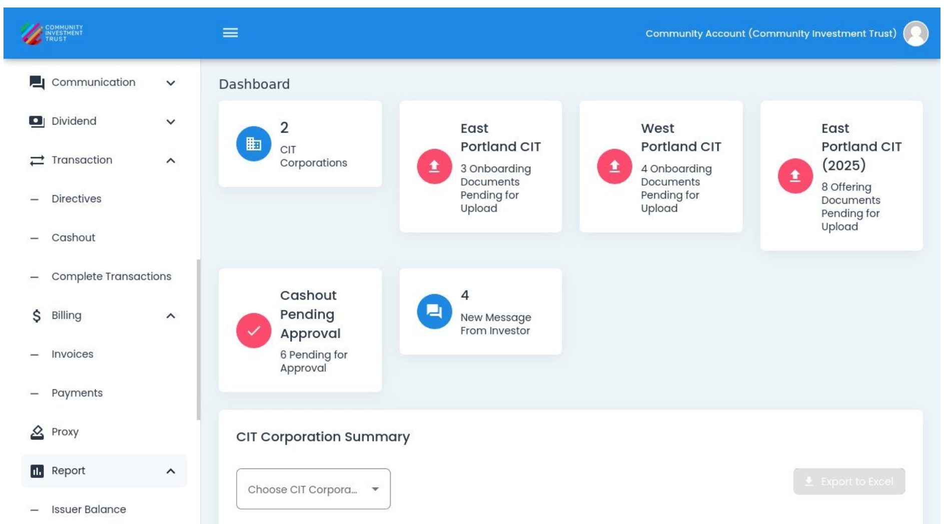


Fig. 184: Report Section Navigation

Report Types

The following reports are available:

Shareholder List

Generate a comprehensive list of all shareholders with filtering by CIT Corporation, Sponsor Organization, address status, and certificate status.

Issuer Balance

View financial summaries by CIT Corporation and offering year, including share sales and investment totals.

Transaction List

View all investment transactions including new issuances and retirements. Filter by transaction type and date range.

Demographics

View demographic data collected from investors with Summary and Questions & Answers tabs.

Renew Demographics

View renewal demographic data collected from investors during the renewal process.

Compare Demographics

Compare demographic data across different time periods for trend analysis.

Cashout Reason

View statistics on reasons investors provide when cashing out investments.

Assessment Test

View investor assessment test results including completion dates and scores.

Shareholder List Report

The **Shareholder List Report** provides a comprehensive overview of all shareholders in the system.

Table of Contents

Features: Shareholder List Report

The **Shareholder List Report** allows you to:

- View all shareholders in the system
- *Filter by CIT Corporation*
- *Filter by Sponsor Organization*
- *Filter by address and certificate status*
- *Configure report options*
- *Download reports in PDF or Excel format*

Report Overview

The **Shareholder List Report** displays shareholder data based on your filter selections.

Filter Options

Use the filters to narrow down your report results:

Filter by CIT Corporation

Select a specific CIT Corporation to filter the report:

Filter by Sponsor Organization

Select a Sponsor Organization to filter the report:

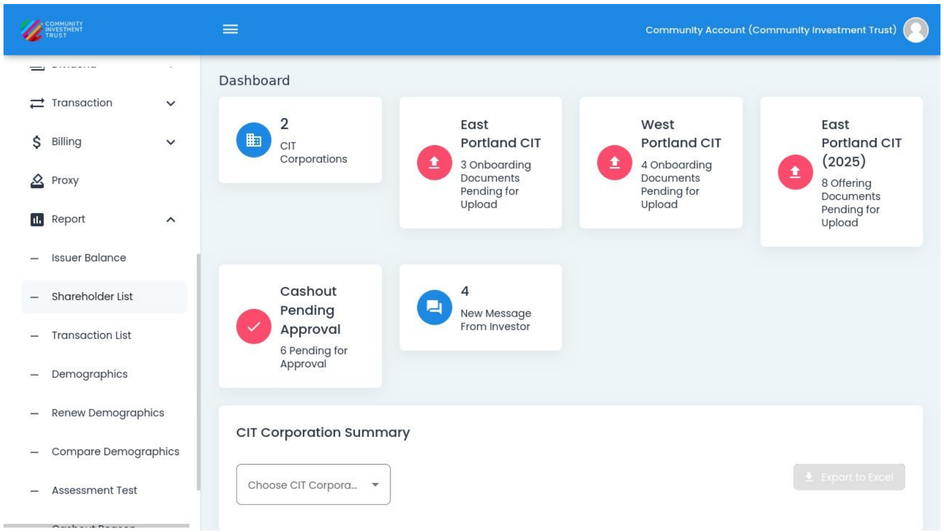


Fig. 185: Shareholder List Report Overview

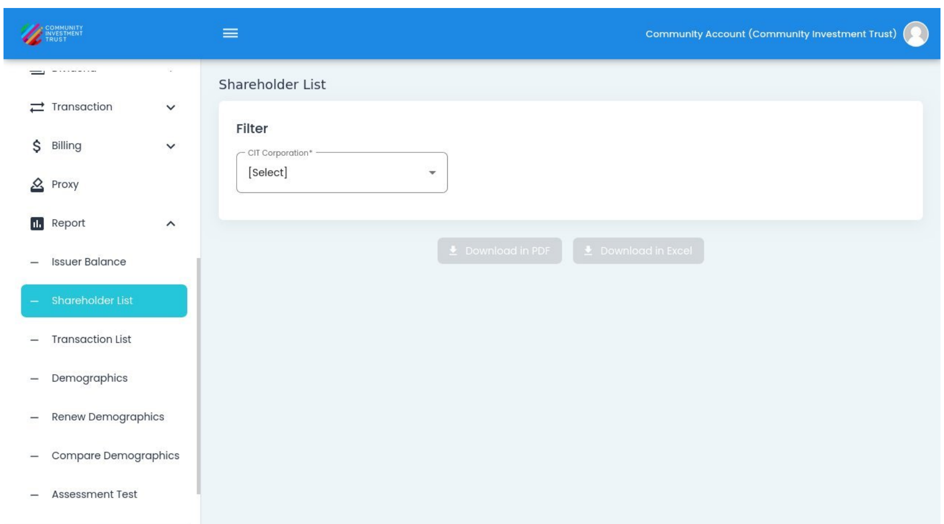


Fig. 186: Shareholder List Filter Options

Filter by Status

Address Status

Filter shareholders by their address verification status:

Certificate Status

Filter shareholders by their certificate status:

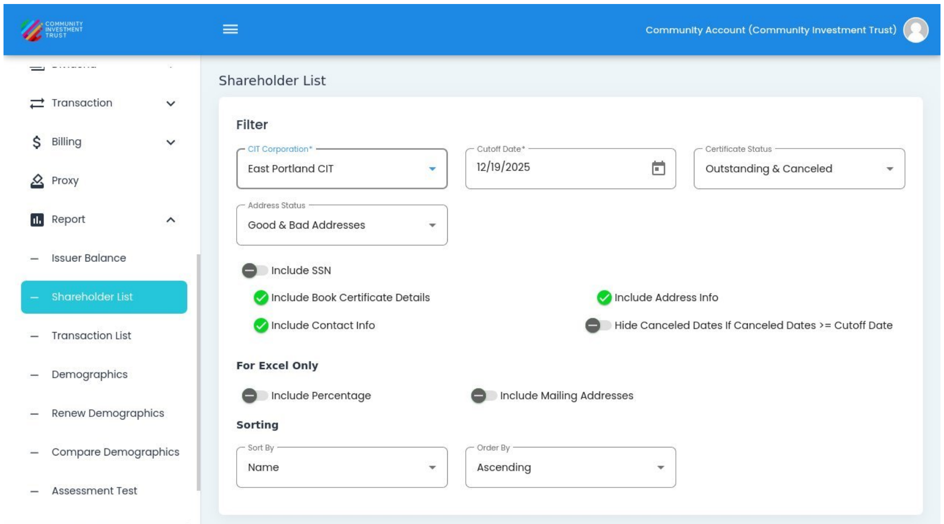


Fig. 187: Filter by CIT Corporation

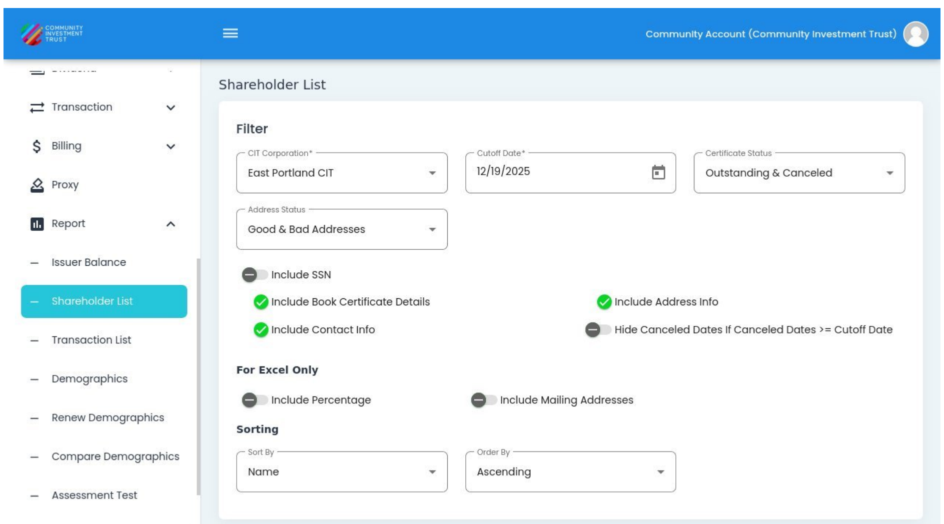


Fig. 188: Filter by Sponsor Organization

Report Options

Use the toggle options to customize which data is included in your reports:

Toggle Options

- **Show Current Shares** Toggle to show current share counts in the report

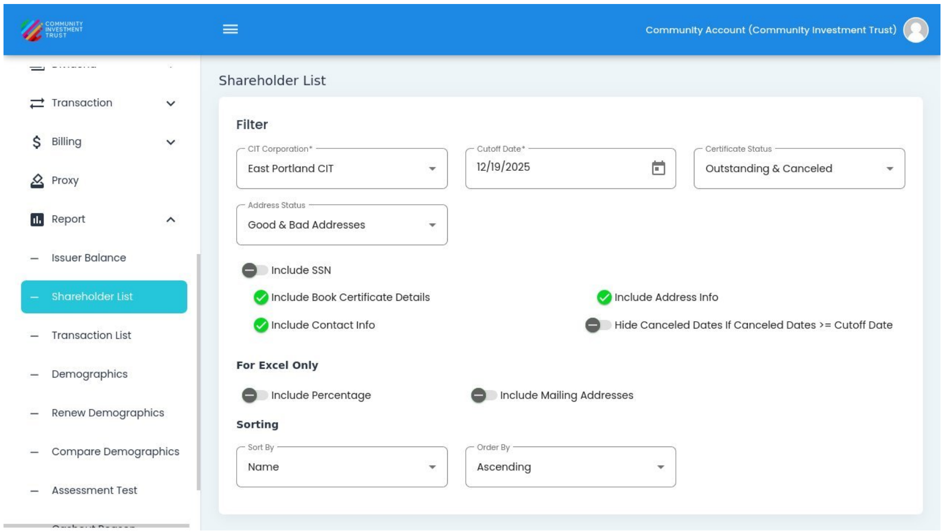


Fig. 189: Filter by Address Status

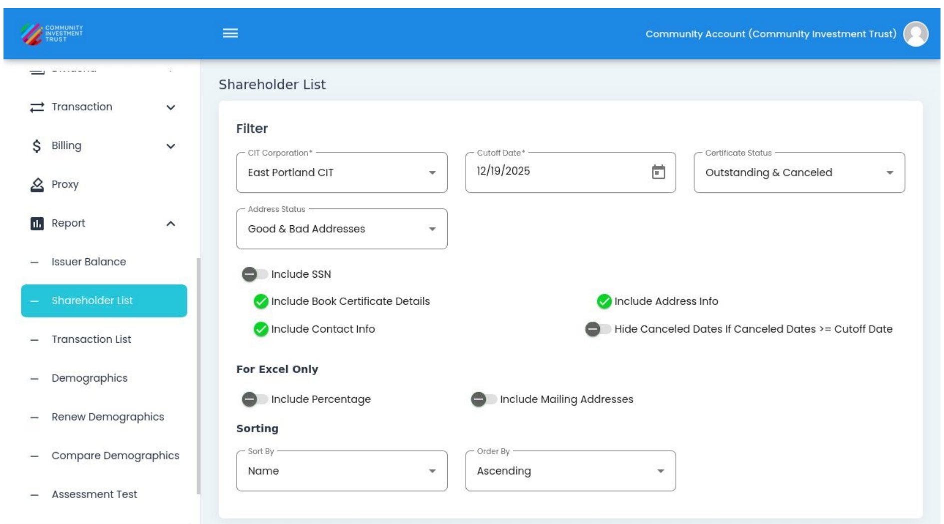


Fig. 190: Filter by Certificate Status

Download Report

Use the download buttons to export your report:

Download Formats

- **Download** Standard download
- **PDF** Download as PDF document
- **Excel** Download as Excel spreadsheet

Tip

Use the Excel format for data analysis and the PDF format for sharing or printing.

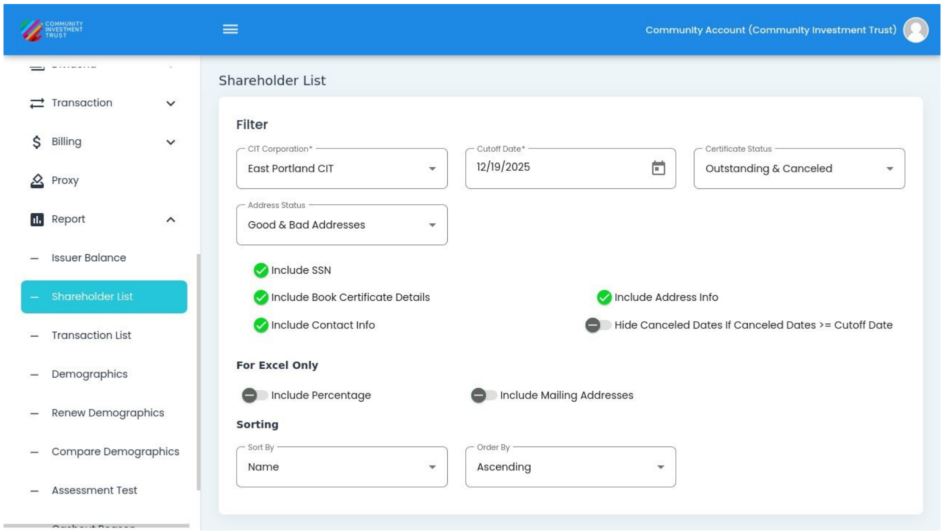


Fig. 191: Report Toggle Options

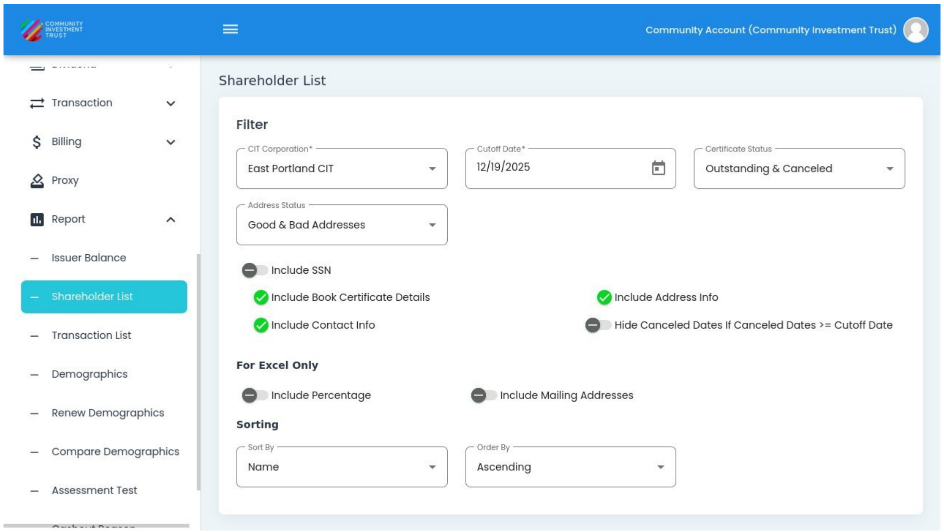


Fig. 192: Report Download Buttons

Issuer Balance Report

The **Issuer Balance Report** provides a financial overview of investment offerings, showing share sales, investment totals, and gains for each offering year.

Table of Contents

Features: Issuer Balance Report

The **Issuer Balance Report** allows you to:

- View financial summaries by CIT Corporation and offering year
- Track total shares sold and investment amounts
- Monitor outstanding shares and gains
- *Filter by CIT Corporation and cutoff date*
- *Download reports in PDF format*

Location

The **Issuer Balance** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

Report Overview

The **Issuer Balance Report** displays financial data organized by offering year.

Report Filters

Configure the filtering criteria before viewing the report data.

CIT Corporation Selection

Select a CIT Corporation from the dropdown to filter the report data.

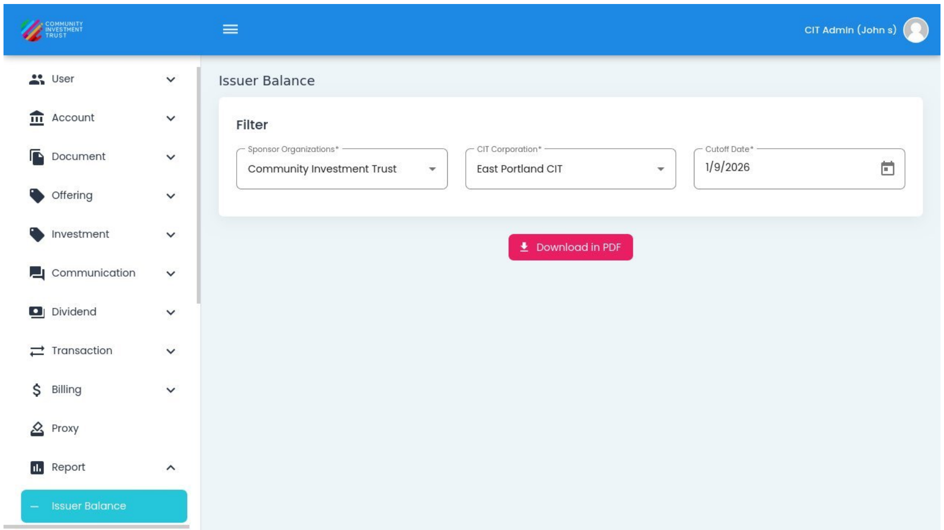


Fig. 193: Issuer Balance Report Overview

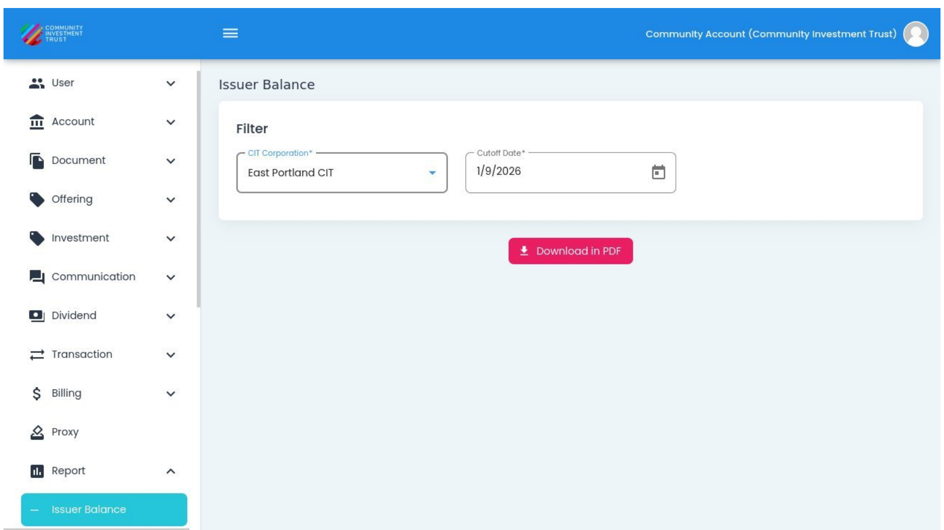


Fig. 194: CIT Corporation Selection

Cutoff Date Selection

The cutoff date determines the point in time for calculating balance figures.

1. Click the calendar icon to open the date picker.
2. Select the desired year and month.

> **Note**
>
> The cutoff date affects all calculated values in the report. Balances are calculated as of the selected date.

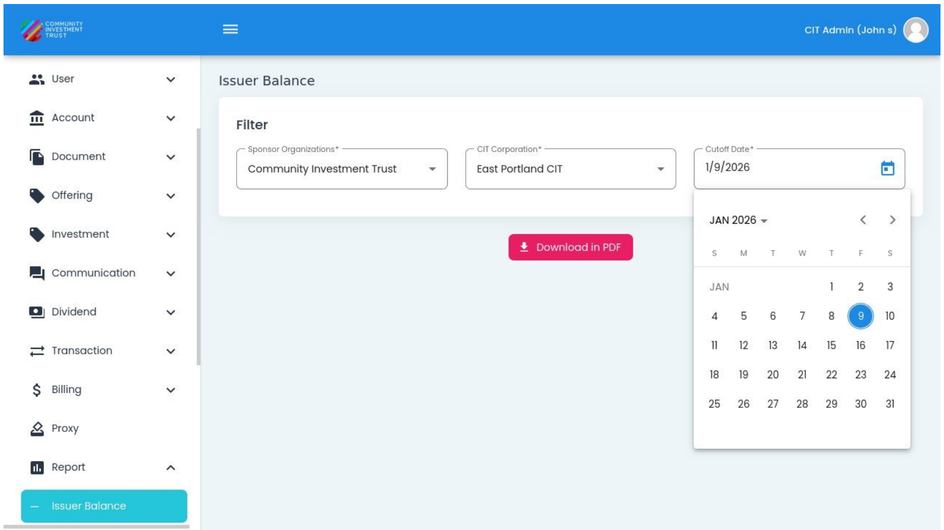


Fig. 195: Cutoff Date Calendar Picker

Download Report

Click the button to download the report.

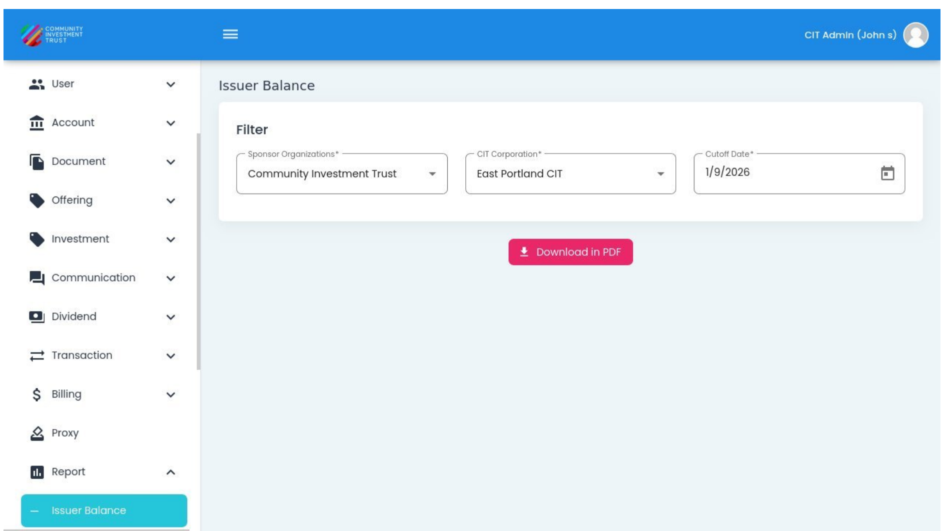


Fig. 196: Download in PDF Button

Tip

The PDF report includes all financial data for the selected CIT Corporation as of the specified cutoff date.

Transaction List Report

The **Transaction List Report** displays all investment transactions including new issuances and retirements (cashouts). Filter by transaction type and date range to analyze specific transaction sets.

Table of Contents

Features: Transaction List Report

The **Transaction List Report** allows you to:

- View transaction data with detailed columns
- *Filter by transaction type*
- *Filter by date range type*
- *Include transaction notes in reports*
- *Download reports in PDF format*

Location

The **Transaction List Report** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

Report Overview

The **Transaction List Report** displays the main report interface:

Report Filters

CIT Corporation Selection

Select a CIT Corporation from the dropdown. You can also select “All” to include all corporations.

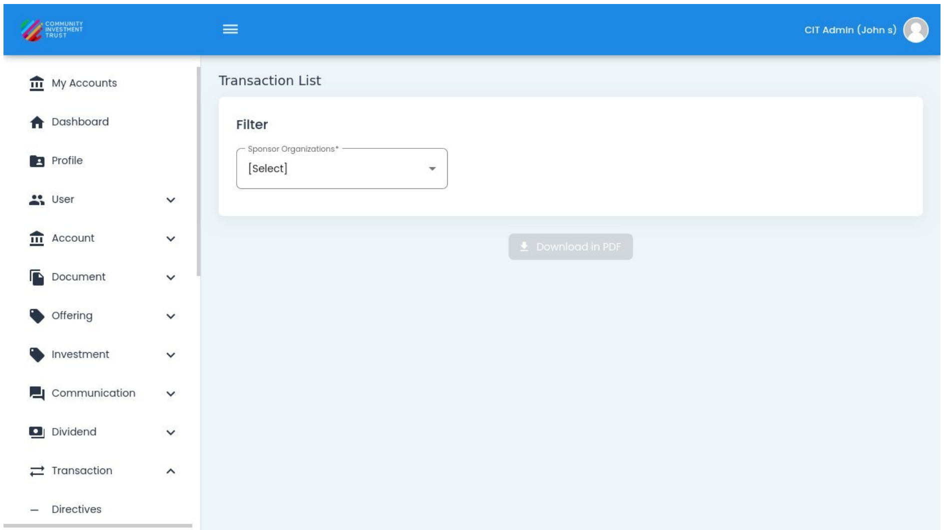


Fig. 197: Transaction List Report Homepage

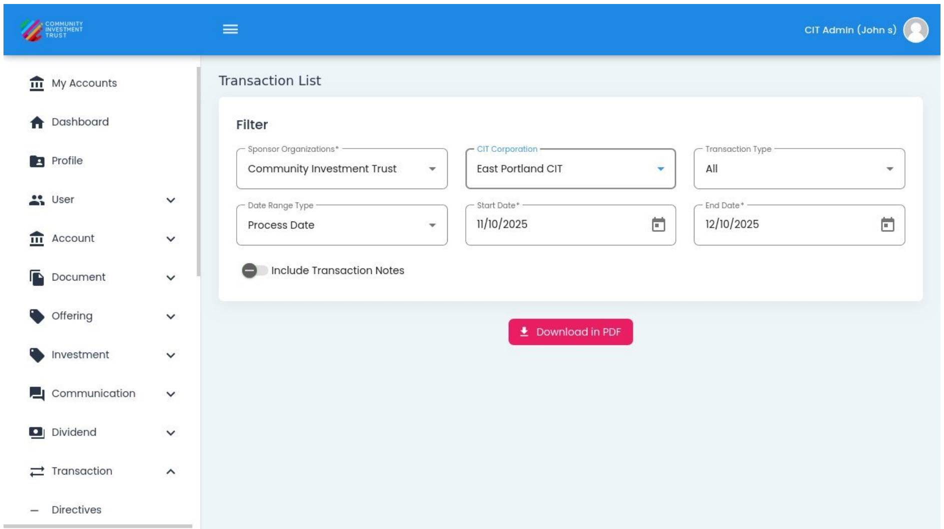


Fig. 198: CIT Corporation Selection

Transaction Type

Select from the following transaction type options:

Transaction Type Options

- **All** All transaction types
- **New Issuance** New investment issuances
- **Retirement/Cashout** Share retirements and cashouts

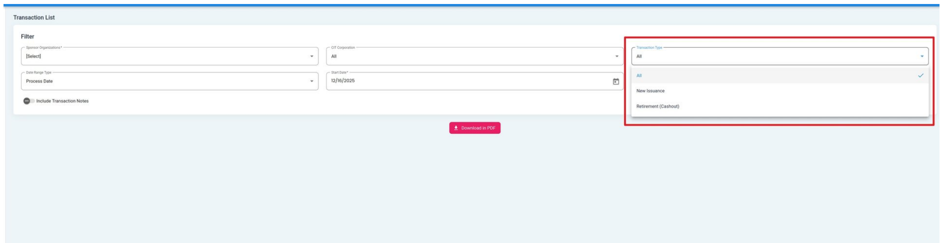


Fig. 199: Transaction Type Filter Dropdown

Date Range Type

Select the date range type:

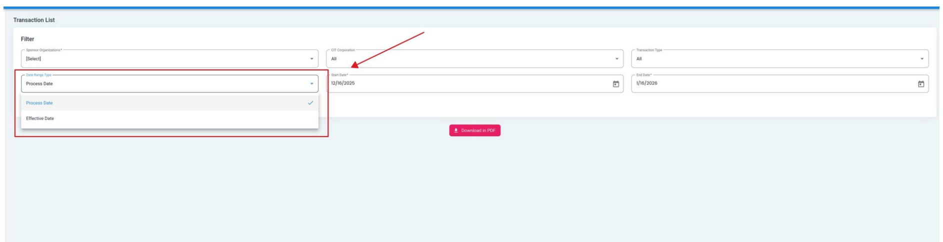


Fig. 200: Date Range Type Options

Date Range Type Options

- **Process Date** Filter by the date transactions were processed
- **Effective Date** Filter by the effective date of transactions

Date Selection

Use the date picker to select the start and end dates for your report:

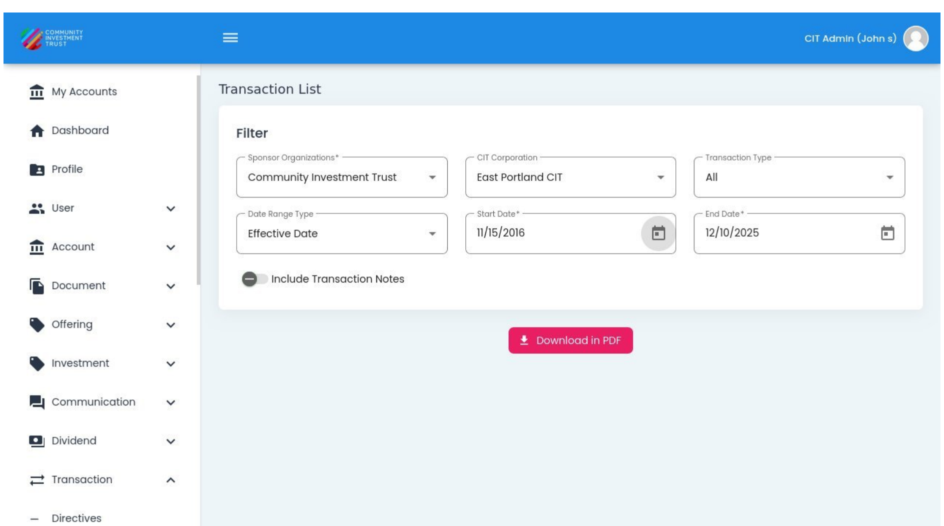


Fig. 201: Date Range Selection

Include Transaction Notes

Toggle this option to include transaction notes in your downloaded report:

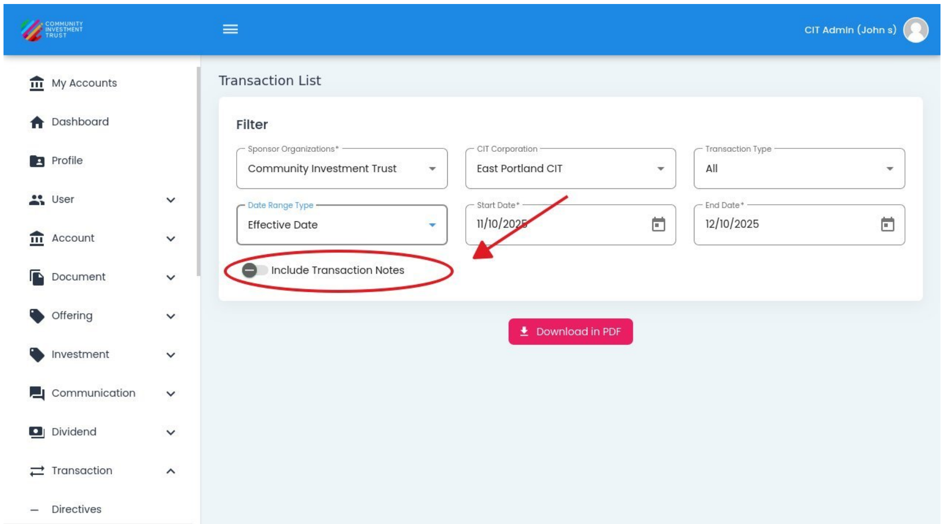


Fig. 202: Include Transaction Notes Toggle

Download Report

Click the button to download the report:

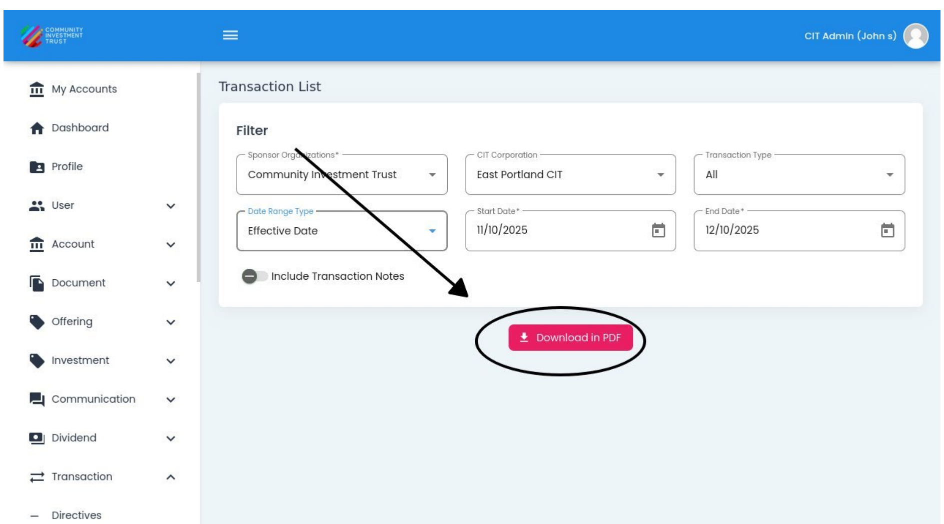


Fig. 203: Download in PDF Button

Note

The download includes all records matching your current filter settings. For large reports, the download may take a few moments to generate.

Demographics Report

The **Demographics Report** provides demographic data collected from investors, organized by CIT Corporation and offering.

Table of Contents

Features: Demographics Report

The **Demographics Report** allows you to:

- View demographic data summaries
- *Filter by CIT Corporation and offering*
- *View Summary tab with count and percentages*
- *View Questions & Answers tab with individual responses*

Location

The **Demographics Report** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

Report Filters

CIT Corporation Selection

Select a CIT Corporation from the **Choose CIT Corporation** dropdown.

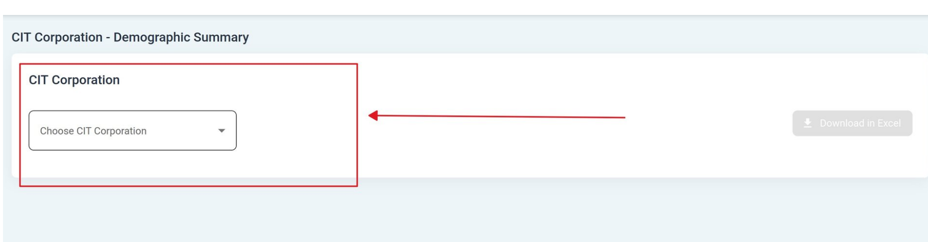


Fig. 204: CIT Corporation Selection

Offering Selection

Select an offering from the dropdown:

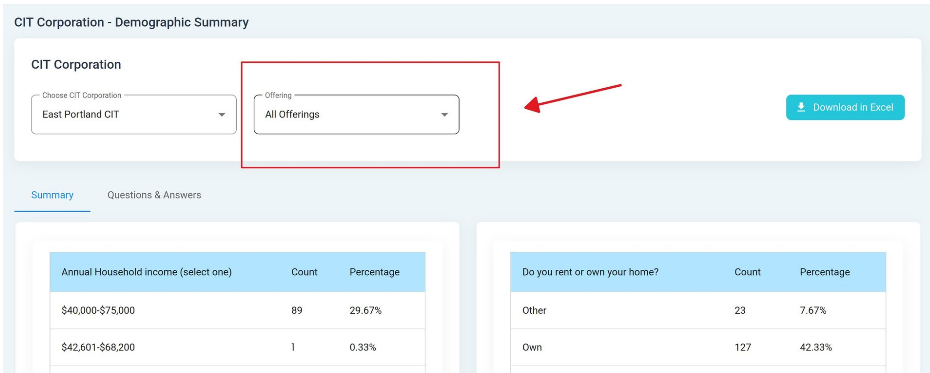


Fig. 205: Offering Selection

Report Tabs

The Demographics Report has two tabs for viewing data:

Summary Tab

The **Summary** tab displays aggregated demographic data with counts and percentages.

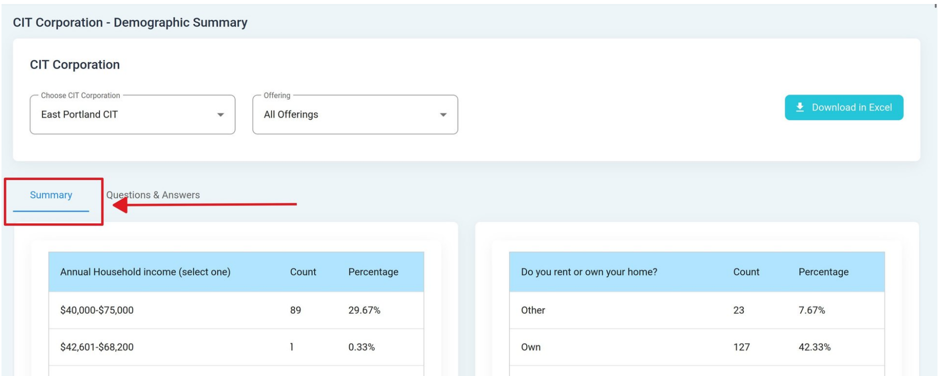


Fig. 206: Summary Tab Location

The Summary tab includes columns showing demographic question responses:

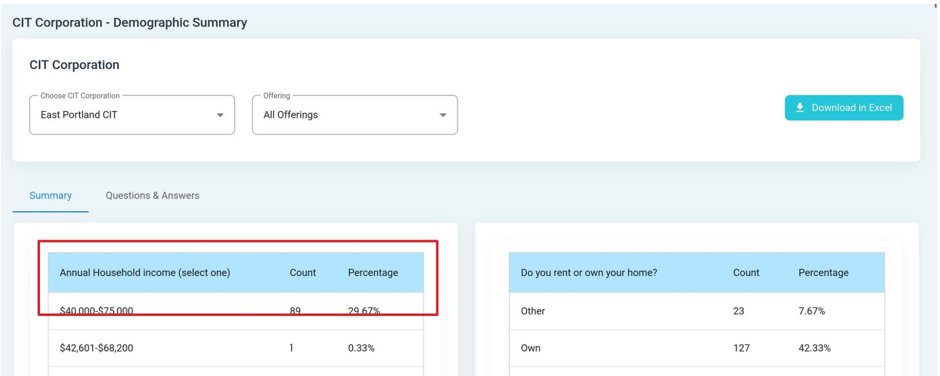


Fig. 207: Summary Table Columns

Summary Table Columns

- **Count** Number of investors who selected this response
- **Percentage** Percentage of total investors

Questions & Answers Tab

The **Questions & Answers** tab displays individual investor responses.

The Q&A tab includes the following column headers:

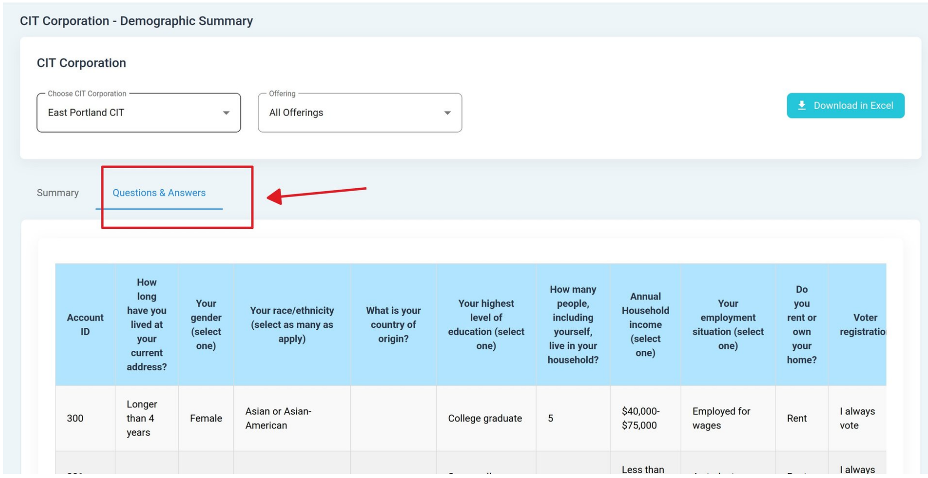


Fig. 208: Questions & Answers Tab Location

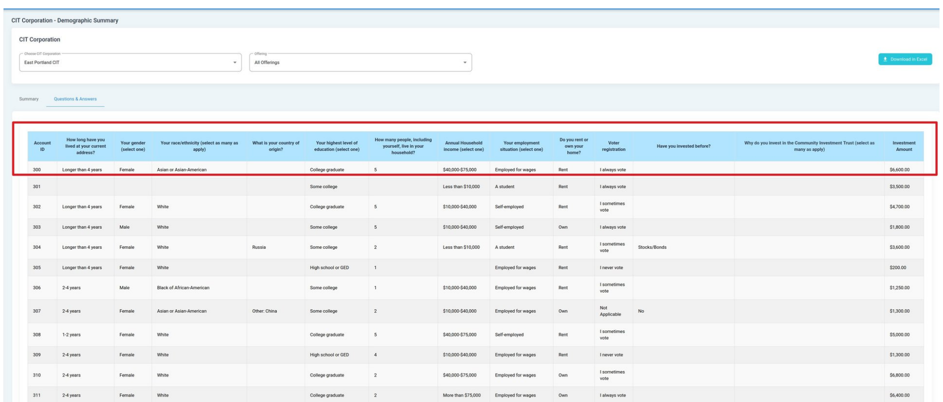


Fig. 209: Questions & Answers Table Columns

Q&A Table Columns

- **Account ID** Investor account identifier
- **Investment Amount** Investment amount for the investor
- Additional demographic response columns

Tip

Use the Summary tab for quick statistical overviews and the Questions & Answers tab for detailed individual investor data.

Renew Demographics Report

The **Renew Demographics Report** provides demographic renewal data collected from investors, showing updated demographic information gathered during the renewal process.

Table of Contents

Features: Renew Demographics Report

The **Renew Demographics Report** allows you to:

- View renewal demographic data by CIT Corporation
- *Filter by CIT Corporation*
- *Download reports in PDF or Excel format*

Location

The **Renew Demographics Report** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

Report Overview

The **Renew Demographics Report** displays renewal demographic data for the selected CIT Corporation. The page heading displays "CIT Corporation Renew" to indicate this report shows renewal demographic data.

CIT Corporation Filter

Select a CIT Corporation from the dropdown to filter the report data.

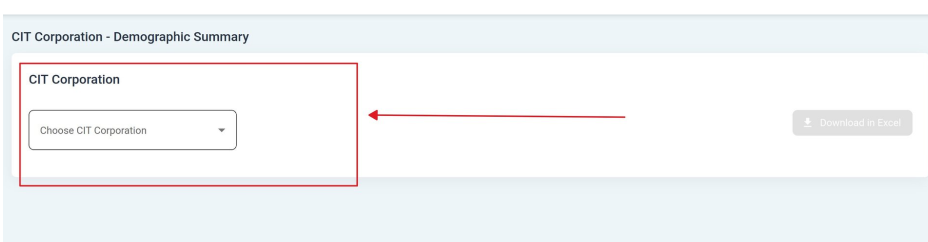


Fig. 210: CIT Corporation Selection

1. Locate the dropdown at the top of the page.
2. Select a CIT Corporation from the available options.

The report will display renewal demographic data for the selected corporation.

Download Reports

Download the report in your preferred format using the download buttons:

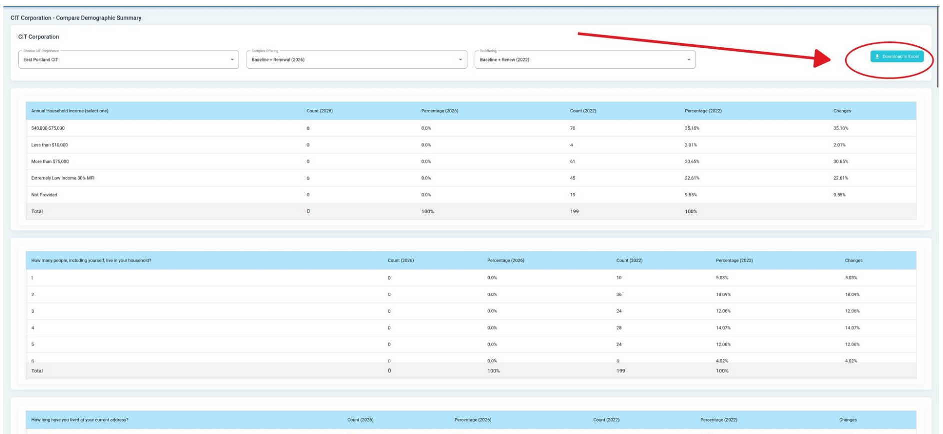


Fig. 211: Download Buttons

Download Options

- **Download in PDF** Download report as a PDF document for sharing or printing
- **Download in Excel** Download report as an Excel spreadsheet for data analysis

Tip

Use the Excel format for data analysis and the PDF format for sharing or printing. The renewal demographic data can be compared with initial demographic data to track changes over time.

Compare Demographics Report

The **Compare Demographics Report** allows you to compare demographic data across different time periods for a CIT Corporation.

Table of Contents

Features: Compare Demographics Report

The **Compare Demographics Report** allows you to:

- Compare demographic data across years
- *Filter by CIT Corporation*
- *Filter by year*
- *Download reports in PDF or Excel format*

Location

The **Compare Demographics Report** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

CIT Corporation Filter

Select a CIT Corporation from the dropdown to filter the comparison data.

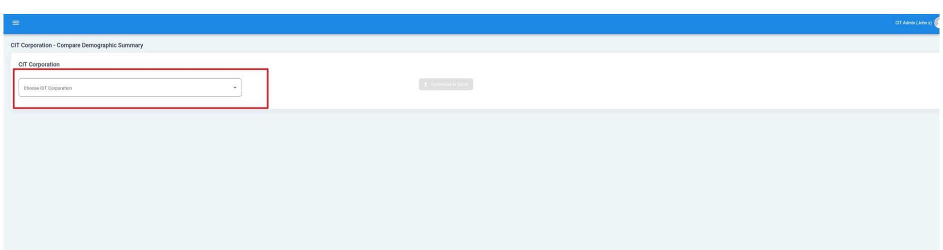


Fig. 212: CIT Corporation Selection

Year Filter

Select the years you want to compare:

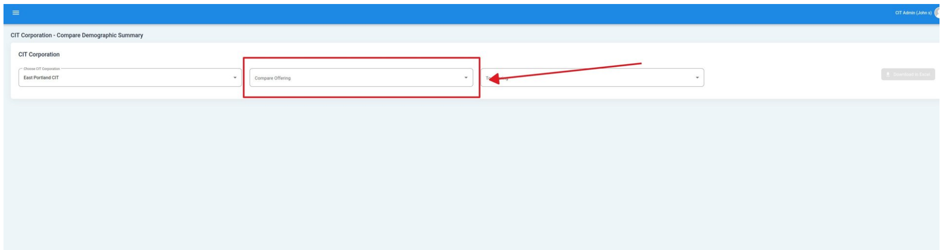


Fig. 213: Year Selection Dropdown

Note

The report displays "CIT Corporation Compare" as the page heading, indicating this shows comparative demographic data.

Comparison Tables

The report displays comparison tables showing demographic changes across the selected time periods:

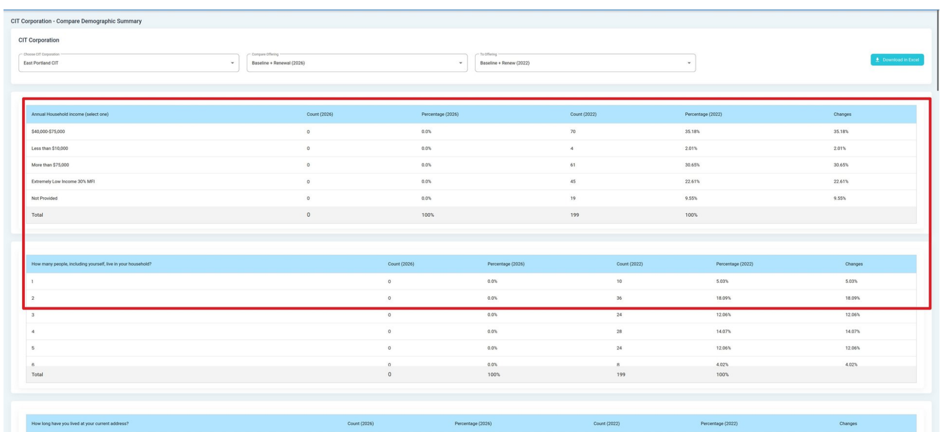


Fig. 214: Comparison Tables Overview

Download Reports

Download the comparison report in your preferred format:

Download Options

- **Download in PDF** Download report as a PDF document
- **Download in Excel** Download report as an Excel spreadsheet

Tip

Use this report to track demographic changes over time and identify trends in your investor base.

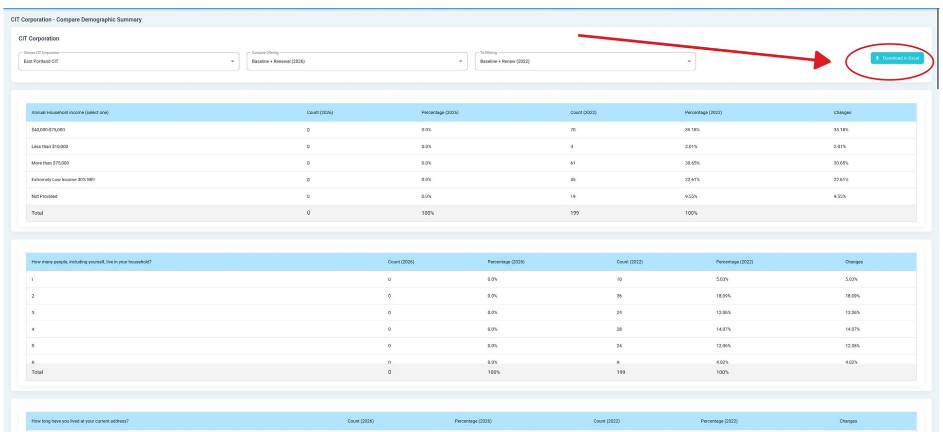


Fig. 215: Download Buttons

Cashout Reason Report

The **Cashout Reason Report** displays statistics on reasons investors provide when cashing out their investments.

Table of Contents

Features: Cashout Reason Report

The **Cashout Reason Report** allows you to:

- View cashout reason statistics
- *Filter by CIT Corporation*
- *Filter by year*
- *View count and percentage breakdown*
- *Download reports in Excel format*

Location

The **Cashout Reason Report** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

Report Filters

CIT Corporation Filter

Select a CIT Corporation from the dropdown:

Year Filter

Select a year from the dropdown. You can also select "All Years" to view data across all years:

Cashout Reason Table

The report displays a table with the following columns:

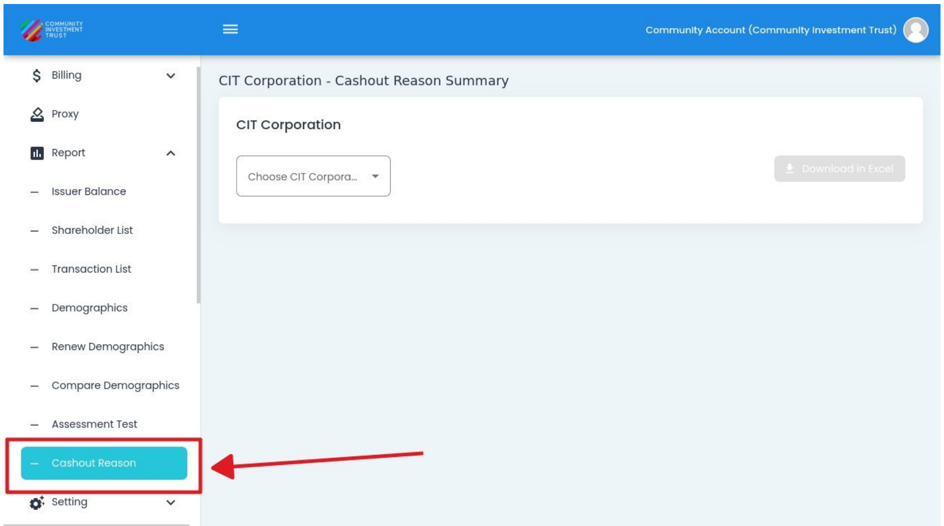


Fig. 216: Cashout Reason Report Navigation

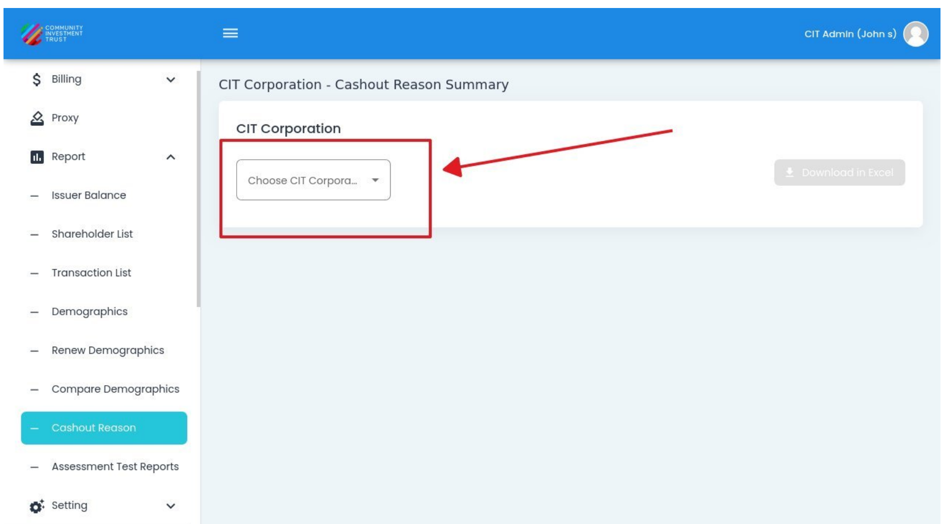


Fig. 217: CIT Corporation Dropdown

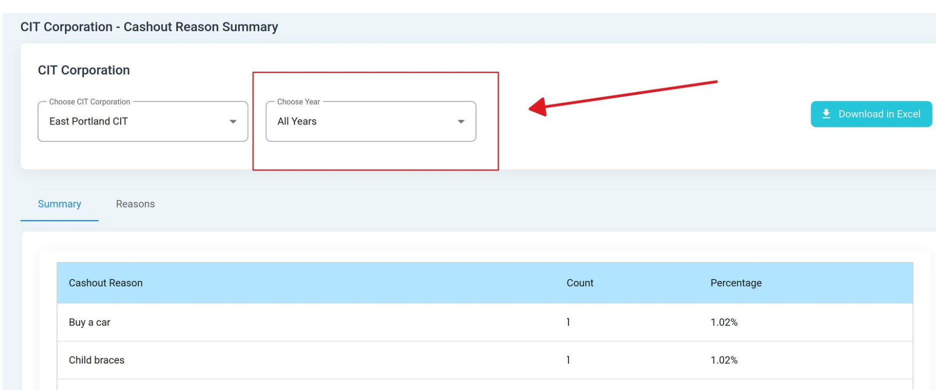


Fig. 218: Year Dropdown

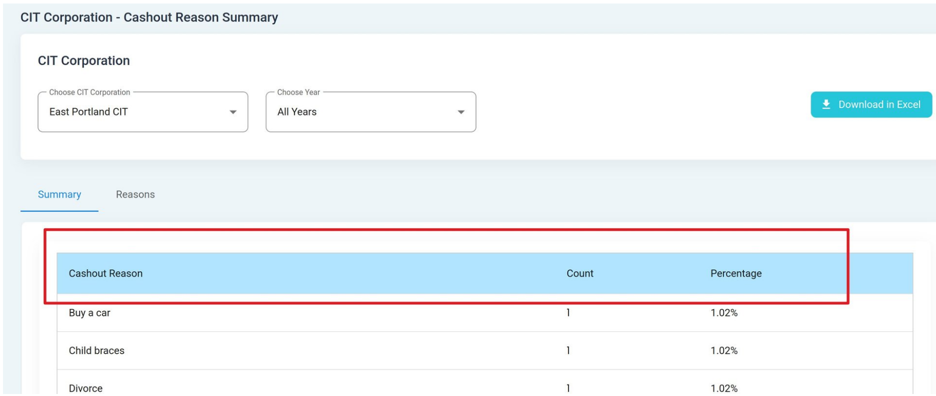


Fig. 219: Cashout Reason Table Columns

Table Columns

- **Cashout Reason** The reason provided by the investor
- **Count** Number of cashouts for this reason
- **Percentage** Percentage of total cashouts

Download Report

Click the button to download the report:

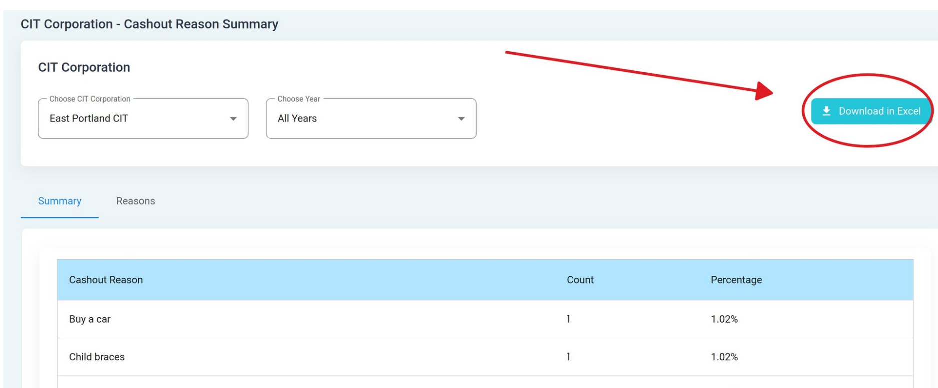


Fig. 220: Download in Excel Button

Tip

Use this report to understand why investors are cashing out and identify trends that may require attention.

Assessment Test Report

The **Assessment Test Report** displays investor assessment test results, showing completion dates and scores.

Table of Contents

Features: Assessment Test Report

The **Assessment Test Report** allows you to:

- View assessment test results for investors
- *Search for specific investors*
- *Sort by column headers*
- Navigate results using pagination
- *View detailed assessment results*

Location

The **Assessment Test Report** page is located in the ▷ **Report** category in the **Primary Sidenavigation** menu.

Report Overview

The **Assessment Test Report** displays a table of investor assessment results:

Table Columns

The assessment test table displays the following columns:

Column Descriptions

- **Account Id** Investor account identifier
- **Account Name** Investor name
- **Start Date** Date the assessment was started

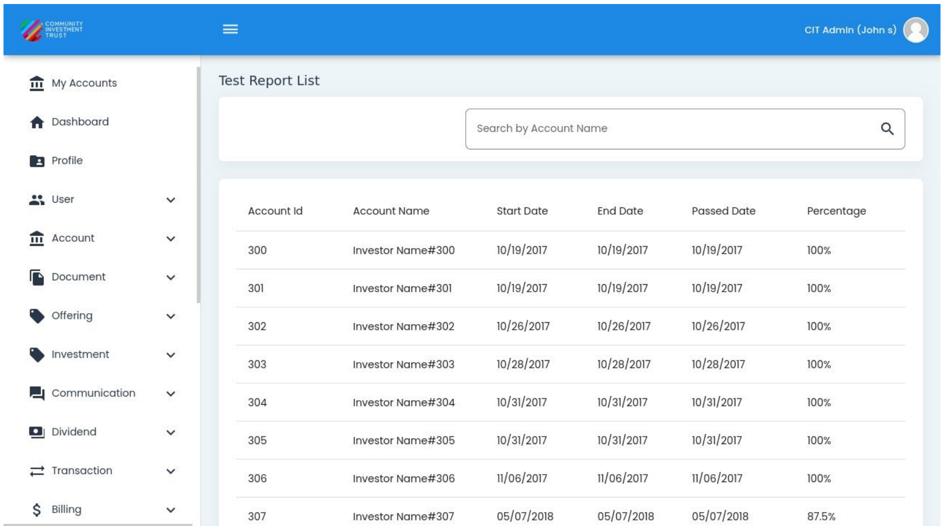


Fig. 221: Assessment Test Report Overview

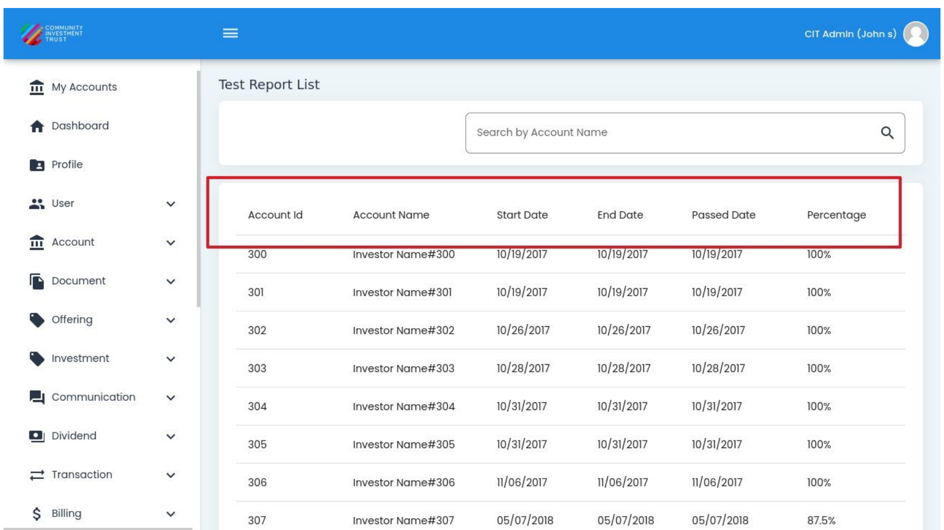


Fig. 222: Assessment Test Table Columns

- **End Date** Date the assessment was completed
- **Passed Date** Date the investor passed the assessment
- **Percentage** Assessment score percentage

Column Sorting

`Click` on column headers to sort the table by that column:

- Account Id
- Account Name
- Percentage

Search Functionality

Use the search field to find specific investors:

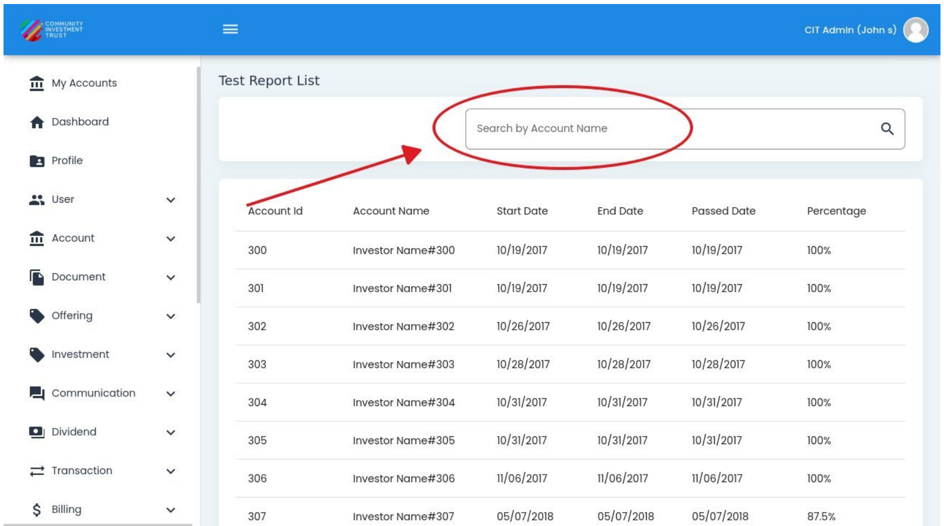


Fig. 223: Search Field Location

1. Enter the investor name or account ID in the search field.
2. Results will filter automatically.
3. Clear the search field to show all results.

Pagination

Use the pagination controls at the bottom of the table to navigate through results.

View Details

Click the button in the Action column to view detailed assessment results for an investor.

To return to the list, click the button.

> **Note**
>
> The Assessment Test Report helps track investor understanding of investment terms and ensures compliance with educational requirements.

I.16 Commmon

This section is meant to house all of the information needed to navigate through portions of the App that come up most frequently.

Table of Contents

Navigation Section

- *General Sidebar Navigation*

Documents

- *View Detailed Document Info*

Edit Permissions

- *Edit Permissions*

User Details

- *User Details*
- *View More Details*

Extras

- *Information Pane*

General Sidebar Navigation

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

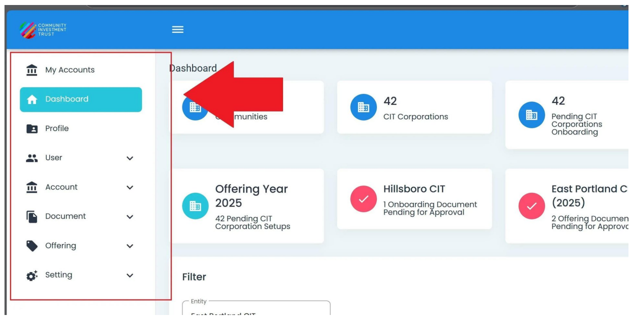


Fig. 224: Navigation, Sidenav Location

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*

2. Select **Staff Page**.

How to Toggle Primary Sidebar

The Primary Sidenavigation menu can be found along the leftside of the page. You'll know if it's collapsed if you don't see any words for the names of the tabs:

To Toggle:

1. Select the *Menu Icon* at the topleft of the page to Toggle the Primary Sidebar:

Result

The sidebar will open up:

Here is an admonition with a dropdown

Admonition content

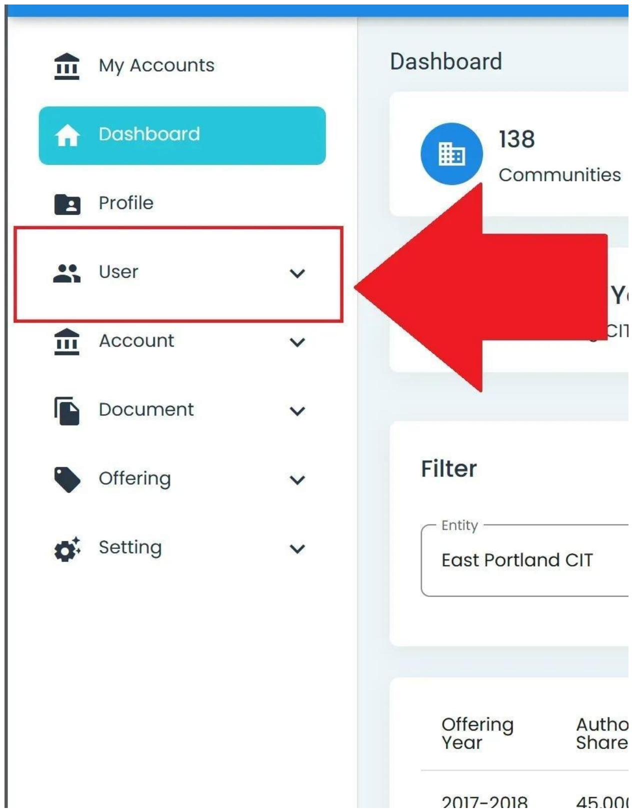


Fig. 225: Navigation, Staff Page Example, Find Users Section

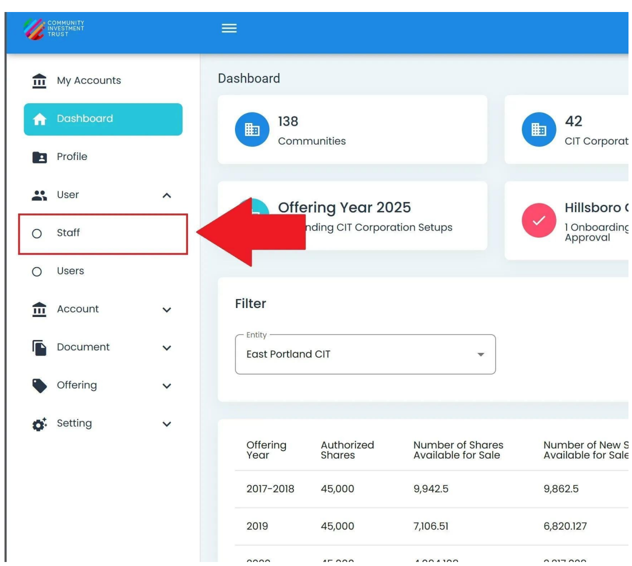


Fig. 226: Navigation, Staff Page

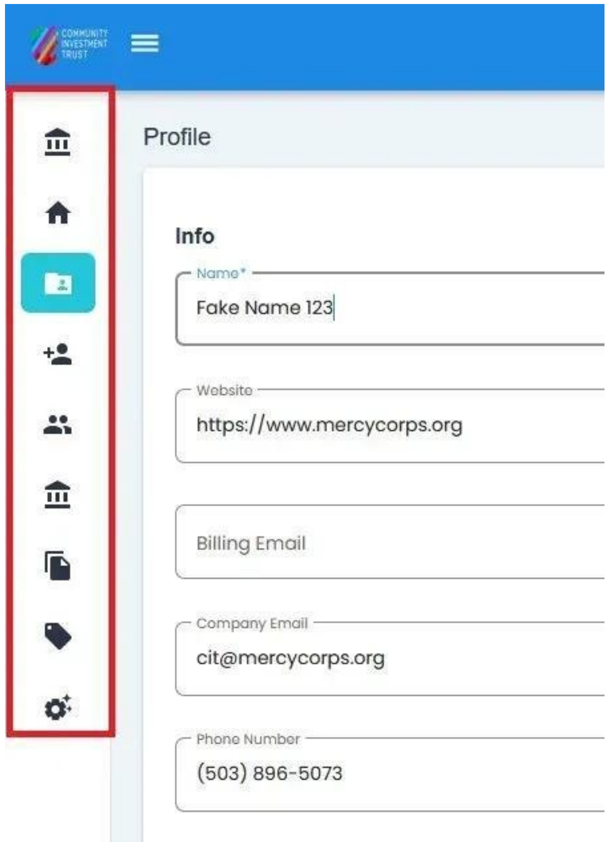
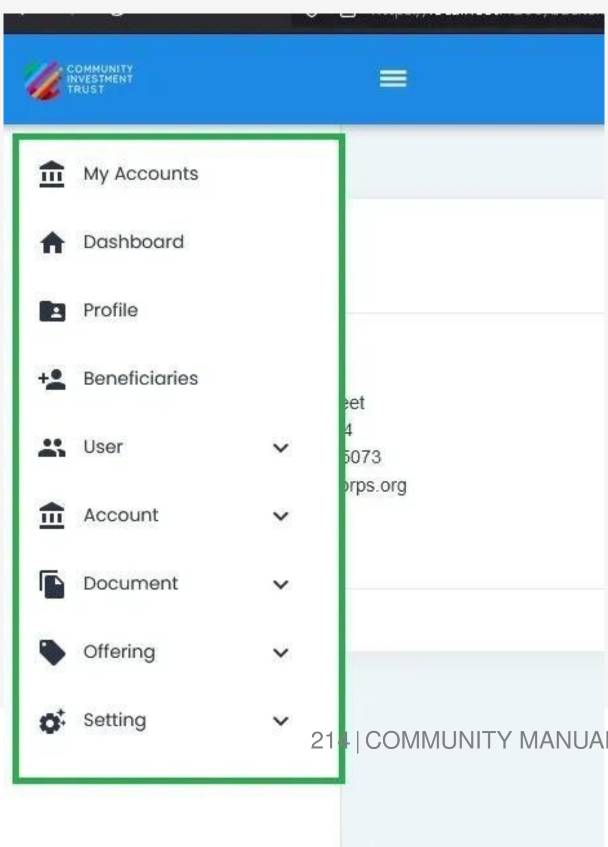


Fig. 227: Collapsed Primary Sidebar

Dropdown inside admonition



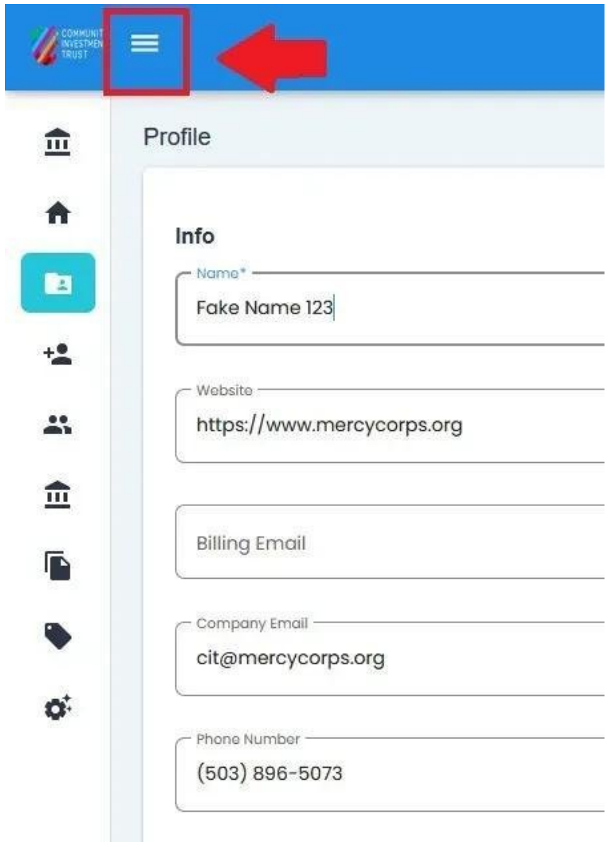


Fig. 228: Primary Sidebar Toggle Location, Collapsed Sidebar

Sidebar Expanded

Information Pane

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

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.

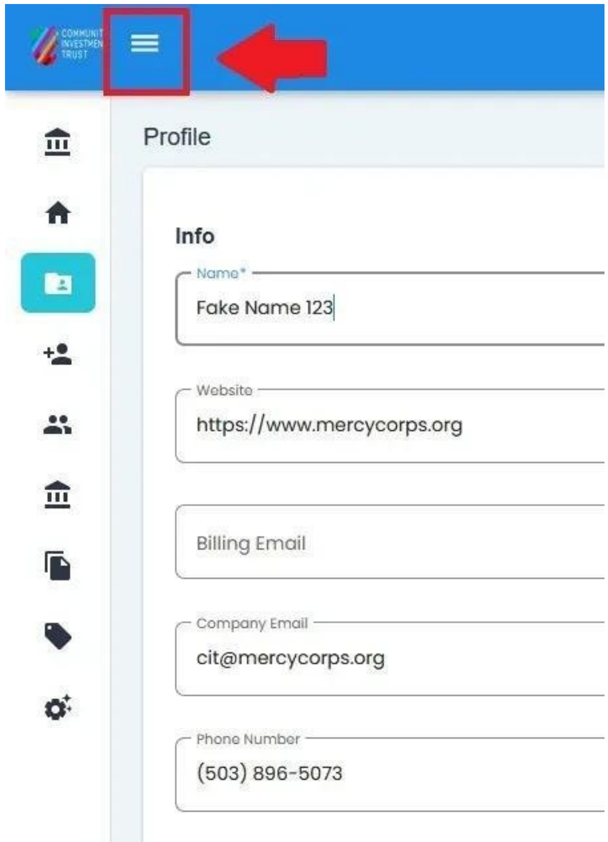


Fig. 229: Primary Sidebar Toggle Location, Collapsed Sidebar

- The date and time the change was made.

User Details Page

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

User Information Tab

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

- *Save Changes*
- *Deactivate User*
- *Reset Password*

You can find the actions at the bottomright of the page:

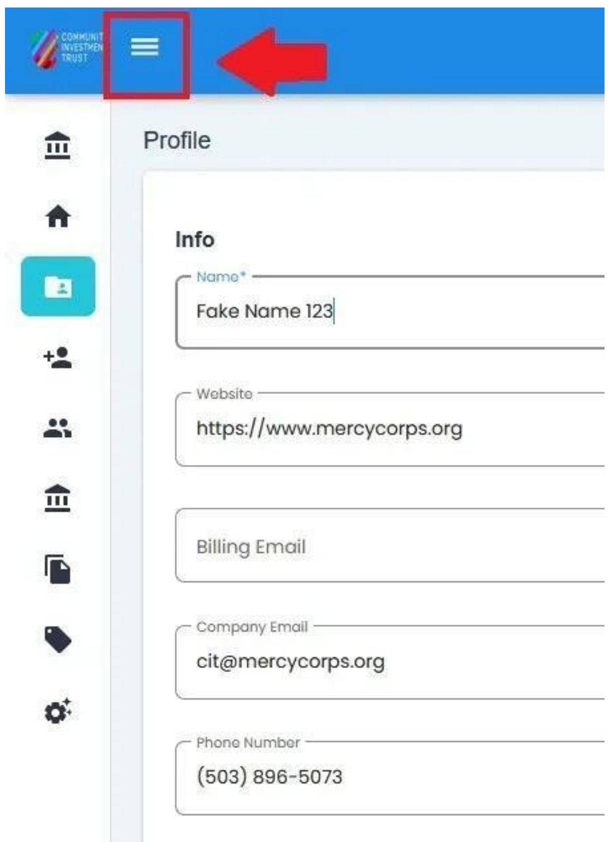


Fig. 230: Toggle Primary Sidebar button.

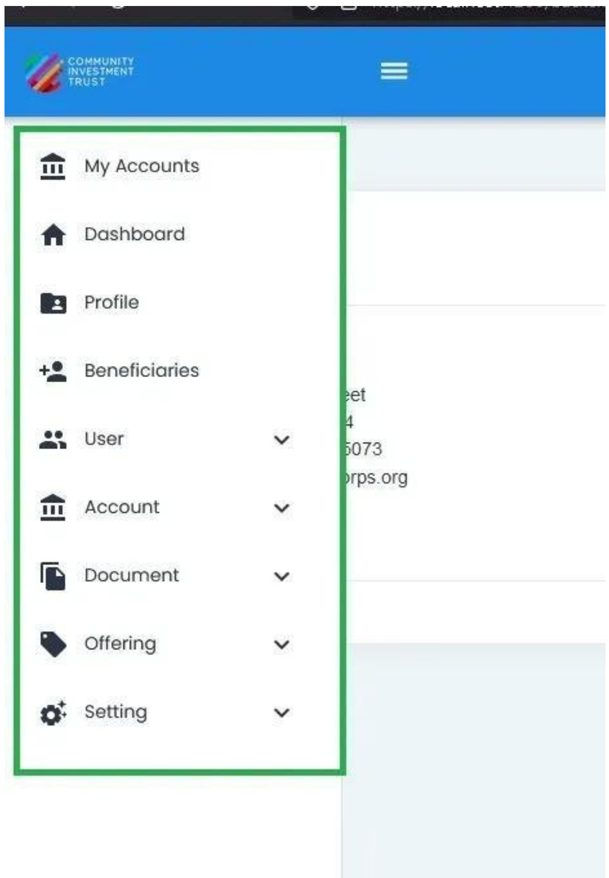


Fig. 231: Sidebar Expanded

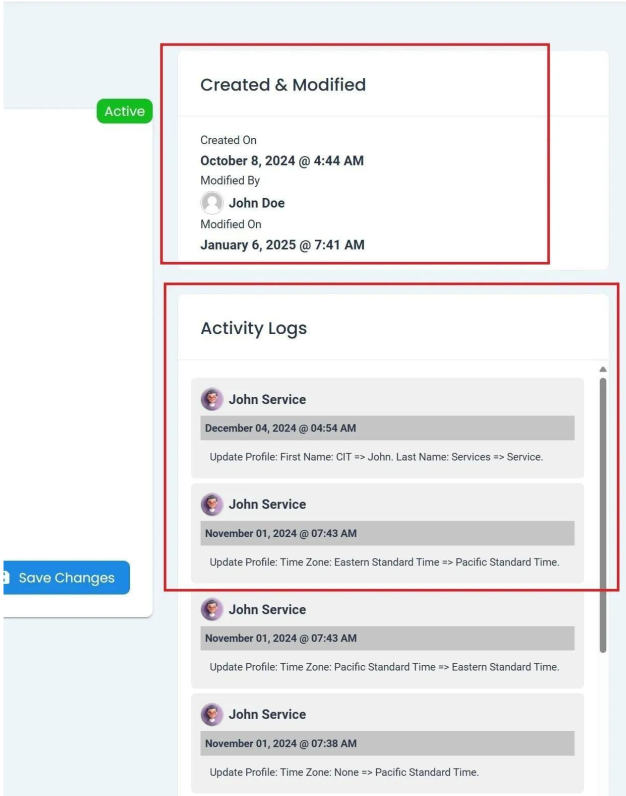
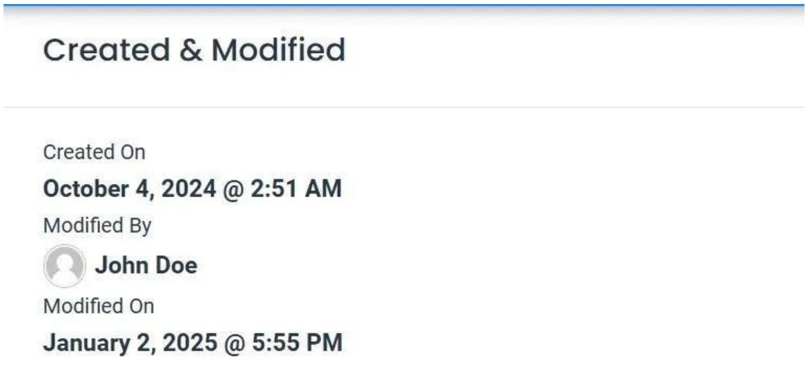
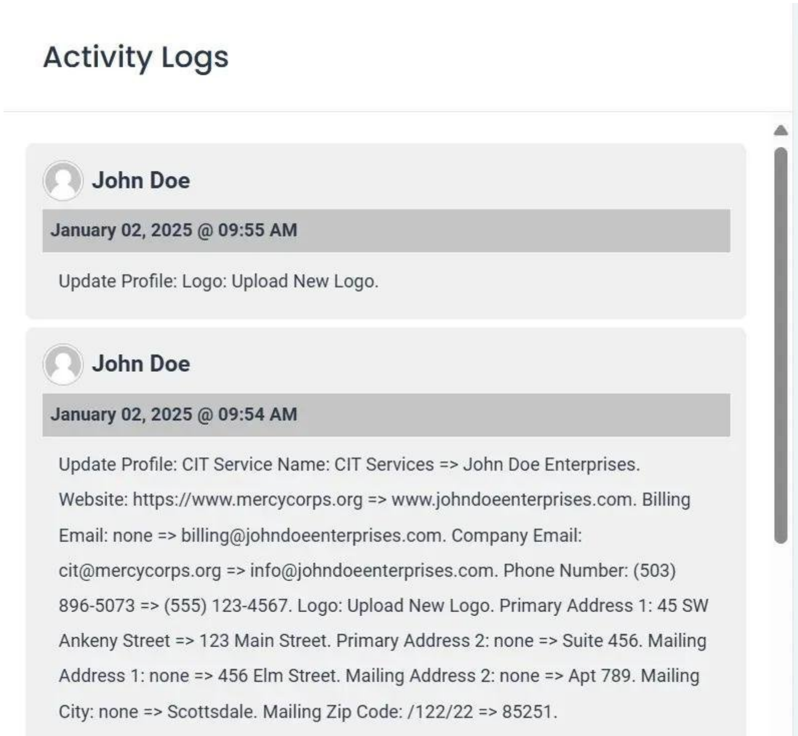


Fig. 232: Information Pane





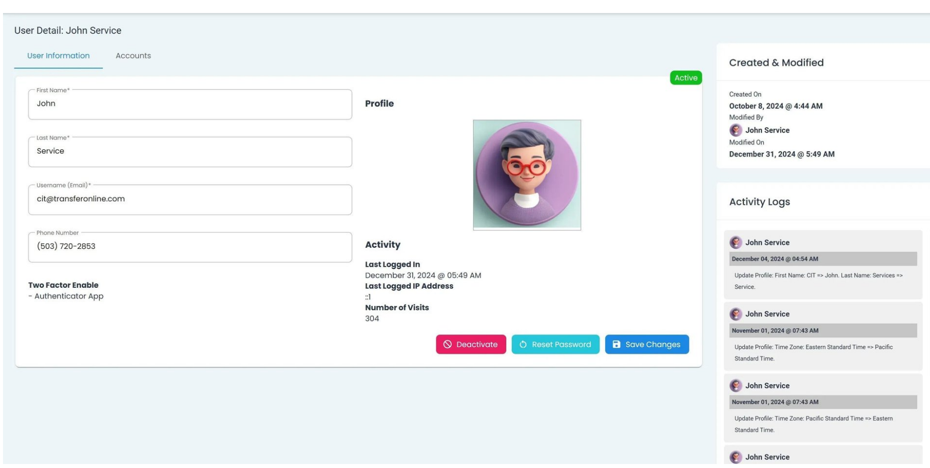


Fig. 233: View User Details Homepage, User Information Tab

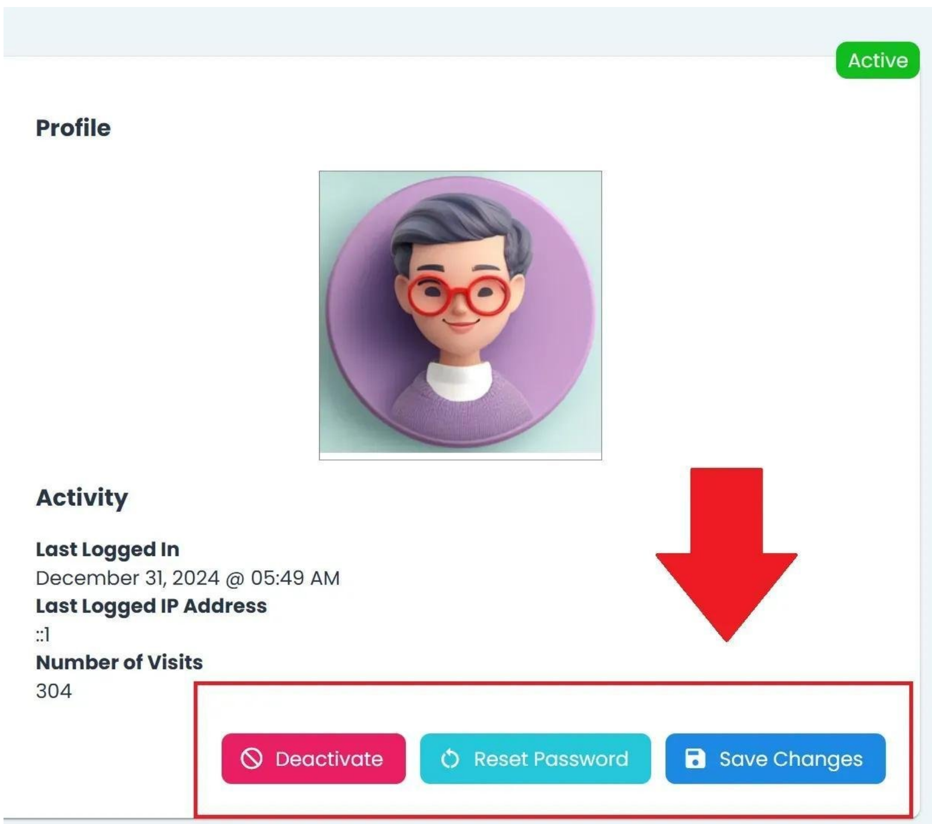


Fig. 234: User Actions Location, Bottom Right

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.

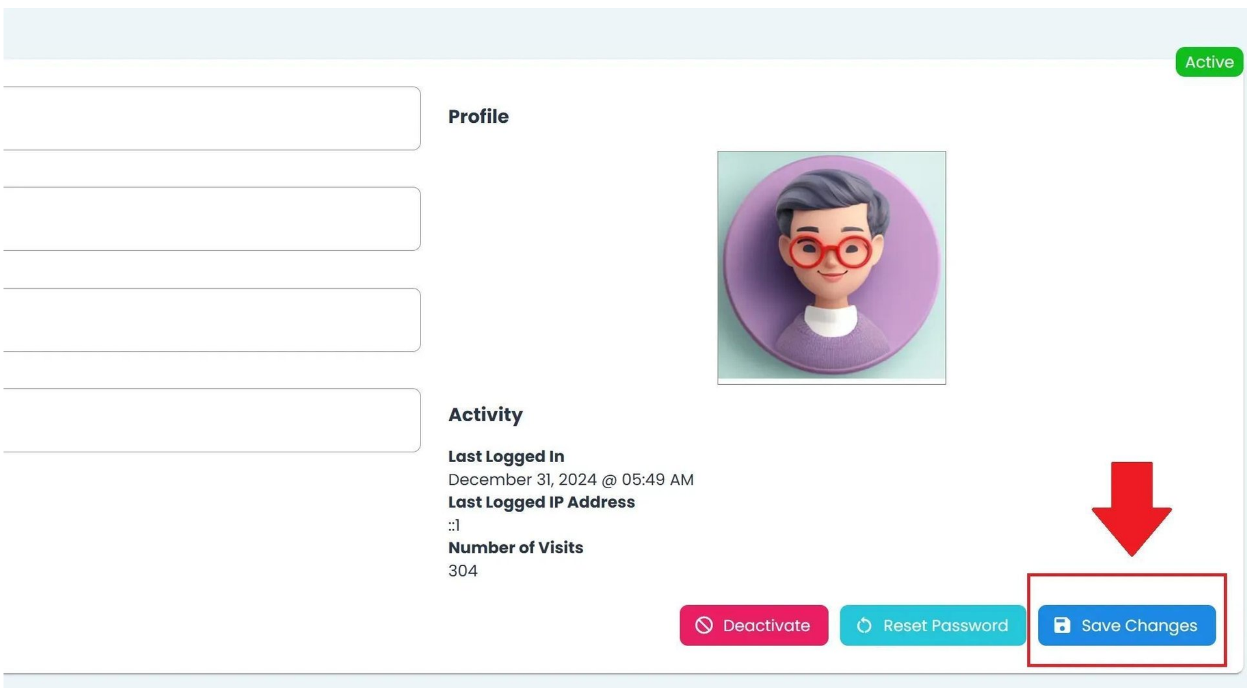


Fig. 235: User, User Homepage, Save Changes

> **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.

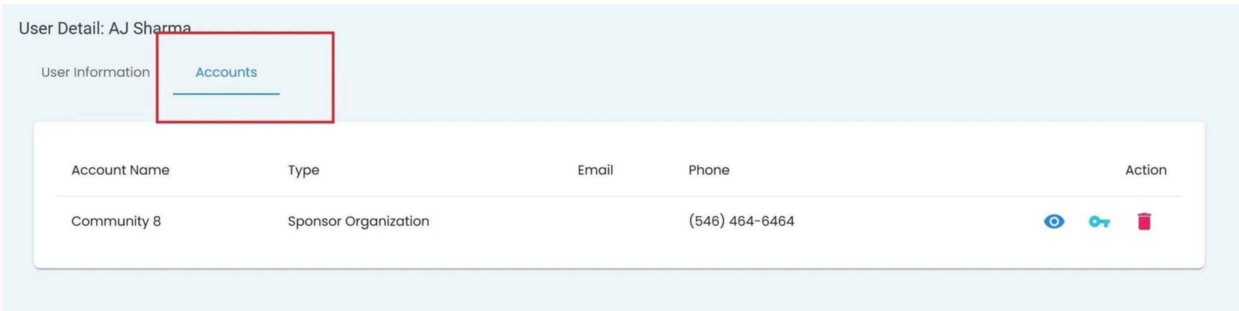


Fig. 236: User, User Details Homepage, ***Accounts*** *Tab*

Accounts Tab: Table Columns

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

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

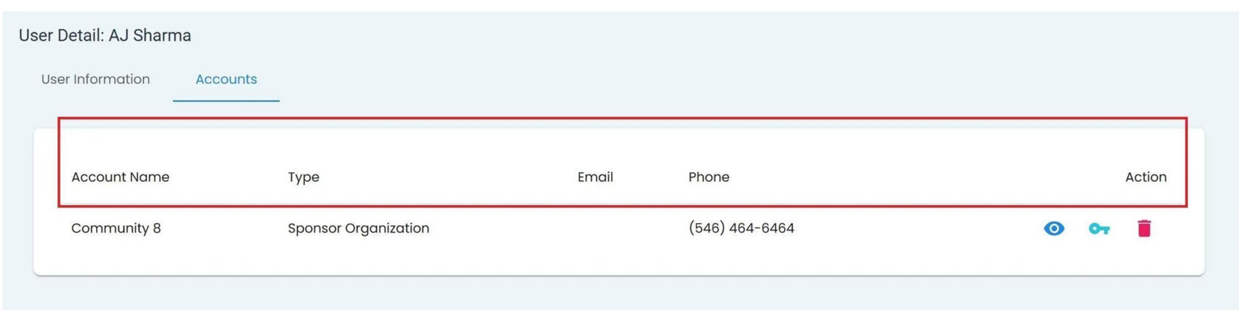


Fig. 237: User, User Details Homepage, ***Accounts Tab****, Column Names*

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

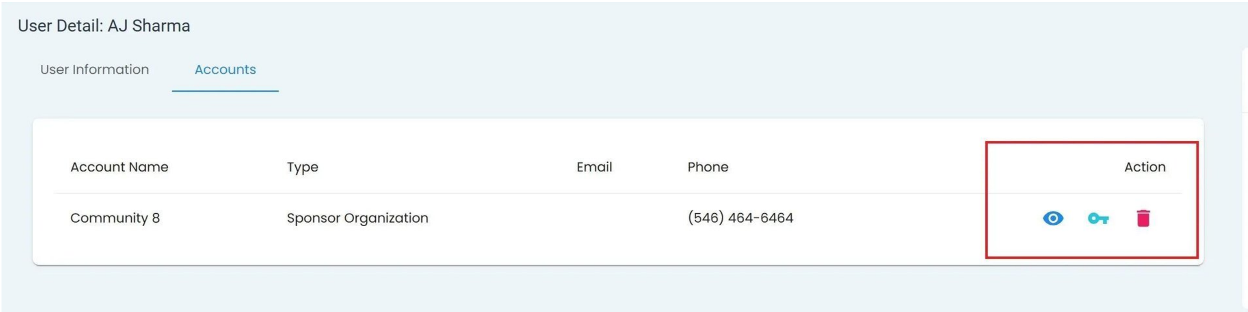


Fig. 238: User, User Details Homepage, **`Accounts`** *Tab,* **`Action`** *Column*

View Sponsorhip Account

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

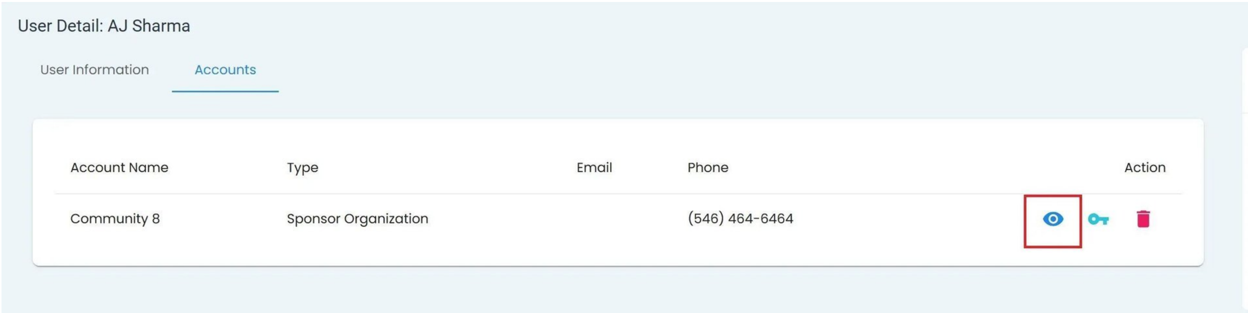


Fig. 239: User, User Details Homepage, Accounts Tab, View Account Icon

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.

III

Other Manuals

- Community Investment Trust (CIT) Documentation for Enterprise Users For enterprise administrators and staff
- Community Investment Trust (CIT) Documentation for Investors For investors managing their accounts and holdings
- Community Investment Trust (CIT) Documentation for CIT Corporation Users For CIT Corporation users