CITApp Data Dictionary

Contents

This data dictionary provides an alphabetized glossary of all column names and field definitions used across the CITApp platform. Each entry includes the definition and crossreferences to the tables where that column appears.

I

How to Use This Dictionary

- **Find a term**: Browse alphabetically or use your browser's search (Ctrl+F / Cmd+F)
- **See usage**: Each entry lists all tables where the column appears
- **Understand context**: Definitions describe what data the column contains

II

Column Glossary

This glossary contains 166 unique column names across 64 tables.

| A

A2P Processing
Status of ApplicationtoPerson (A2P) transaction processing activity.

Used in: Enrollments

ABSTAIN
Total shares abstaining from the vote.

Used in: Proxy Proposals Table

Account ID
Unique number assigned to each investor account.

Used in: Enrollments, Investors Table, Proof Of Address List, Shareholder List Report Table

Account Id
Unique identifier linking the investor's account to their assessment results.

Used in: Assessment Test Reports Table

Account Name
Full name of the investor who completed the assessment test.

Used in: Assessment Test Reports Table, investorbankaccountlist

Account Number
Account number for the bank account.

Used in: investorbankaccountlist

Action
Actions that can be performed on the transaction.

Used in: Beneficiaries Table, CIT Corporations List, Cash Payouts List, Cashout List, Complete Transactions List, Directives List, Dividend Cash Payouts, Dividends List, Documents, Investments List, Investors Table, Invoices List, Offering Documents Table, Offerings List, Onboarding Documents Table, Proof Of Address List, Proxy Test List, Sponsorship Organizations List, Staff List, User List, appliedcredittoinvoices, billingplanslist, investorbankaccountlist, investorfinancialdocslist, investormessageslist, investornamechangerequestlist, investorofferingsigneddocslist, investorproxylist, paymentcreditlist, paymentcreditstable, paymentinvoicestable, tolinvoiceslist, tolpaymentslist

Actions
Available operations you can perform on each listed entity.

Used in: Beneficiaries List, Documents List, Entity List

Active Date
Date when the offering became active or available to investors.

Used in: Offerings List

Address
Beneficiary's complete mailing address, including street, city, and state.

Used in: Beneficiaries Table, Proof Of Address List

AGAINST
Total shares voting against the proposal.

Used in: Proxy Proposals Table

Amount

The value of the transaction.

Used in: Cash Payouts List, Complete Transactions List, Dividend Cash Payouts, Invoices List, Transaction List Report Table, billingplanslist, investordividendslist, invoicedetailsfields, invoicelineitemfields, paymentcreditlist, paymentcreditstable, paymentinvoicestable, tolinvoicelineitems, tolinvoicepayments, tolinvoiceslist, tolpaymentslist

Amount Applied

Amount applied to this invoice.

Used in: tolappliedpayments

Amount Per Share

Dividend amount per share held.

Used in: Investor Dividends List

Answer

Response option selected by investors for each demographic question.

Used in: Demographics Q&A Table, Demographics Report Table

Applied Amount

Amount applied to invoices.

Used in: appliedcredittoinvoices, tolpaymentslist

Applied On

Date the credit was applied.

Used in: appliedcredittoinvoices

Approved By

The user who approved the document (if applicable).

Used in: Document Card

Authorized Shares

Total shares approved for issuance in the Offering.

Used in: CIT Corporation Cashout, CIT Corporation Summary

Available Credit

Remaining credit available to apply.

Used in: tolpaymentslist

Avoiding Share Resource

Indicates actions taken to prevent using shared stock resources.

Used in: Enrollments

I B

Balance

Remaining amount due on this invoice.

Used in: Invoices List, appliedcredittoinvoices, invoicedetailsfields, paymentcreditlist, paymentcreditstable, paymentinvoicestable, tolnvoiceslist

Bank Account Type

Type of account (Checking or Savings).

Used in: investorbankaccountlist

Bank Info

Bank account designated to receive the cashout payment.

Used in: investorcashoutlist

Bank Name

Name of the financial institution holding the account.

Used in: investorbankaccountlist

Beneficiary Percentage

Share of assets assigned to the beneficiary, shown as percent.

Used in: Beneficiaries Table

Bill To

Name or entity responsible for paying the invoice amount.

Used in: Invoices List, invoicedetailsfields, paymentinvoicestable

Billed To

Entity that made the payment.

Used in: appliedcredittoinvoices, paymentcreditlist, paymentcreditstable

Billing Account

The account associated with this billing plan.

Used in: billingplanslist

Book Number

Unique identifier for a specific investment certificate or holding.

Used in: Documents, Documents List, Holdings, Holdings List, investorholdingslist

II C

Canceled Date

Date the holding or certificate was canceled or invalidated.

Used in: Documents, Documents List, Holdings, Holdings List, investorholdingslist

Cash Payout

The cash payout identifier or name.

Used in: Cash Payouts List, Dividend Cash Payouts

Cashout Amount

The amount to be paid out.

Used in: Cashout List, investorcashoutlist

Certificate Status

State of share certificates: Outstanding, Canceled, or pending issuance.

Used in: Shareholder List Report Table

CIT Corporation

Associated CIT Corporation.

Used in: CIT Corporations List, Cashout List, Directives List, Dividends List, Investments List, Investor Cashouts List, Investor Dividends List, Offering Documents Table, Offerings List, Onboarding Documents Table, Proxy Test List, investorcashoutlist, investordividendslist, investorholdingslist, investormessageslist, investormonthlycontributionslist, investorofferingsigneddocslist, investorproxylist

Closing Date

Deadline for submitting votes.

Used in: Proxy Test List

Contact Email

Email address used to contact the associated individual or entity.

Used in: Staff List, User List

Contact Info

Beneficiary's phone number and email address.

Used in: Beneficiaries List

Contact Name

Full name of the listed contact person.

Used in: Staff List, User List

Count

Total number of investors who selected this particular response option.

Used in: Cashout Reason List, Cashout Reason Report, Demographics Report Table

Current Account Name

The investor's current registered name.

Used in: investornamechangerequestlist

||| D

Date

The date the transaction occurred.

Used in: Complete Transactions List, Document Card, Invoices List, Transaction List Report Table, investormessageslist, paymentcreditlist, paymentcreditstable, paymentinvoicestable, tolinvoiceslist, tolpaymentslist

Date Uploaded

Date when the document was uploaded.

Used in: investorfinancialdocslist

Description

Description of the line item.

Used in: invoicelineitemfields, tolinvoicelineitems

Dividend

Unique identifier or name for the specific dividend event.

Used in: Dividends List

Dividend ID

Unique identifier for the dividend payment.

Used in: Investor Dividends List

Document Complete

Number of completed Offering documents for the corporation.

Used in: Offering Documents Table, Onboarding Documents Table

Document Name

Name of the signed document.

Used in: investorofferingsigneddocslist

Document Type

Type of document, such as certificate, letter, or other.

Used in: Documents, Documents List, Proof Of Address List

Due Less than 30 Days

Number of offering documents due within the next 30 days.

Used in: Offering Documents Table

IV   E

Effective Date

Date when the transaction officially takes effect.

Used in: Directives List

Email

Primary email address for contacting the organization.

Used in: Beneficiaries Table, CIT Corporations List, Sponsorship Organizations List

End Date

Date and time when the investor completed or exited the assessment.

Used in: Assessment Test Reports Table

Expiration Date

Date when the billing plan expires.

Used in: billingplanslist

V   **F**

File Name
> The name of the uploaded document file.

> **Used in:** Document Card

File Type
> The format or type of the document (PDF, DOC, etc.).

> **Used in:** Document Card

Filename
> Name of the uploaded document file.

> **Used in:** investorfinancialdocslist

FOR
> Total shares voting in favor of the proposal.

> **Used in:** Proxy Proposals Table

VI   **H**

Heading for Whiteboard
> Title or label used to categorize items on whiteboard.

> **Used in:** Enrollments

Hold Investment/Cashout
> Indicates if investment is held or being cashed out.

> **Used in:** Enrollments

VII   **I**

ID
> Unique number assigned to each organization in the system.

> **Used in:** CIT Corporations List, Offering Documents Table, Onboarding Documents Table, Sponsorship Organizations List, investordividendslist, investorfinancialdocslist, investormonthlycontributionslist, investorofferingsigneddocslist, paymentcreditlist, paymentcreditstable, tolpaymentslist

Internal Note
> Internal notes for administrative use.

> **Used in:** invoicedetailsfields

Investment Amount
> Total money invested in the holding by the investor.

> **Used in:** Enrollments, Holdings, Holdings List, Offerings List, Shareholder List Report Table, investorholdingslist, investormonthlycontributionslist

Investment Date
> Date when the investment was made.

> **Used in:** investormonthlycontributionslist

Investor

The investor associated with the transaction.

Used in: Cash Payouts List, Cashout List, Complete Transactions List, Demographics Q&A Table, Enrollments

Investor Name

Name of the investor.

Used in: Investments List, Investors Table, Proof Of Address List, Shareholder List Report Table

Invoice

Invoice number the credit was applied to.

Used in: appliedcredittoinvoices

Invoice Amount

Original invoice amount.

Used in: appliedcredittoinvoices

Invoice Date

Date the invoice was created.

Used in: appliedcredittoinvoices, invoicedetailsfields, tolappliedpayments

Invoice No.

Unique identifier assigned to each invoice for tracking purposes.

Used in: Invoices List, paymentinvoicestable, tolinvoiceslist

Invoice Number

Unique identifier for the invoice.

Used in: invoicedetailsfields, tolappliedpayments

Invoice Type

Category of invoice (Service, Fee).

Used in: invoicedetailsfields

Issued Date

Date when the shares or investment certificate were officially issued.

Used in: Documents, Documents List, Holdings, Holdings List, investorholdingslist

Item Type

Type of line item (Post, etc.).

Used in: invoicelineitemfields, tolinvoicelineitems

VIII L

Last Billed

Date of the most recent billing cycle.

Used in: billingplanslist

Last Logged In

Date and time the contact last accessed the platform.

Used in: User List

Last Logged In

Most recent date and time the user accessed the system.

Used in: Staff List

LC Limit

Lowest price allowed per share in one trading session.

Used in: CIT Corporation Cashout, CIT Corporation Summary

IX M

Messages

Any messages or notes associated with the document.

Used in: Document Card

Monthly Whiteboard

Monthly summary or notes related to the account's activities.

Used in: Enrollments

X N

Name

Name of the account holder or entity for this record.

Used in: Beneficiaries List, Beneficiaries Table, User Table

New Account Name

The requested new name for the account.

Used in: investornamechangerequestlist

New Message

Shows count of new messages about the Offering process.

Used in: Offering Documents Table, Onboarding Documents Table

Next Billing Date

Scheduled date for the next billing.

Used in: billingplanslist

Note to Biller

External notes visible to the biller.

Used in: invoicedetailsfields

Number of CIT Corporations

Count of corporations associated with the sponsoring organization.

Used in: Sponsorship Organizations List

Number Of Investments

Count of individual investments included in the transaction.

Used in: Directives List

Number of Investors

Count of investors receiving the dividend payment.

Used in: Dividends List

Number of New Shares Available for Sale

Newly issued shares not yet sold in the Offering.

Used in: CIT Corporation Cashout, CIT Corporation Summary

Number of Shares Available for Sale

Shares currently available for sale, including new and existing shares.

Used in: CIT Corporation Cashout, CIT Corporation Summary

Number of Visits

Total times the user has accessed the system.

Used in: Staff List, User List

XI   O

Offering Name

The official name assigned to the specific offering.

Used in: Offerings List

Offering Year

Year when the Offering took place.

Used in: CIT Corporation Cashout, CIT Corporation Summary, Issuer Balance Report, Offering Documents Table, investormonthlycontributionslist, investorofferingsigneddocslist

Organization

The organisation associated with the transaction.

Used in: Cash Payouts List, Complete Transactions List, Dividend Cash Payouts

Original Cashout Amount

The initial cash amount designated for cashing out shares.

Used in: Offerings List

XII   P

Paid

Amount already paid toward this invoice.

Used in: Invoices List, invoicedetailsfields, paymentcreditlist, paymentcreditstable, paymentinvoicestable, tolnvoiceslist

Passed Date

Date when the investor successfully passed the required assessment threshold.

Used in: Assessment Test Reports Table

Payable

Date when dividend payment is issued to shareholders.

Used in: Dividends List, investordividendslist

Payable Date

The date when the cash payout is payable.

Used in: Cash Payouts List, Dividend Cash Payouts

Payment Date

Date when the dividend was or will be paid.

Used in: Investor Cashouts List, Investor Dividends List, tolinvoicepayments

Payment Number

Unique payment identifier.

Used in: tolinvoicepayments

Payment Reference

Reference number for tracking the payment.

Used in: investordividendslist

Payment Type

Method of payment.

Used in: investordividendslist, tolinvoicepayments

Pending Amount

Total amount not yet finalized or settled for the offering.

Used in: Offerings List

Pending For Approaval

Number of submitted documents waiting for approval.

Used in: Onboarding Documents Table

Percent Voted

Percentage of eligible shares that voted.

Used in: Proxy Proposals Table

Percentage

Final score achieved on the assessment, displayed as a percentage value.

Used in: Assessment Test Reports Table, Beneficiaries List, Cashout Reason List, Cashout Reason Report, Demographics Report Table

Phone

Primary telephone number for the organization's main contact.

Used in: Beneficiaries Table, CIT Corporations List, Sponsorship Organizations List

Plan

Name or description of the billing plan.

Used in: billingplanslist

Plan Number

Unique identifier for the billing plan.

Used in: billingplanslist

Price Per Share

Amount of dividend paid for each individual share.

Used in: Cashout List, Dividends List, Investor Cashouts List, Issuer Balance Report, Offerings List, investorcashoutlist

Proxy Id

Unique identifier for the proxy voting record.

Used in: Proxy Test List, investorproxylist

XIII   Q

Quantity

Number of units.

Used in: tolinvoicelineitems

Question

Text of the demographic survey question presented to investors.

Used in: Demographics Q&A Table

Quorum

Required percentage of votes for the meeting to be valid.

Used in: Proxy Test List

XIV   R

Reason

Category explaining why the investor chose to cash out their investment.

Used in: Cashout Reason List, Cashout Reason Report

Record Date

Date shareholders must own shares to receive the dividend.

Used in: Dividends List, Investor Dividends List, Proxy Test List

Recurring Type

Frequency of billing (Monthly, Quarterly, SemiAnnually, Annually).

Used in: billingplanslist

Reference No.

Reference number for the payment transaction.

Used in: paymentcreditlist, paymentcreditstable, tolpaymentslist

Relationship

Relationship to the investor (spouse, child, sibling, etc.).

Used in: Beneficiaries List

Remaining Balance

Remaining balance on the invoice.

Used in: tolappliedpayments

Req. By

Person who submitted the name change request.

Used in: investornamechangerequestlist

Req. Date

Date when the request was submitted.

Used in: investornamechangerequestlist

Request Date

Date when the cashout was requested.

Used in: Investor Cashouts List

Results

Final outcome indicator showing whether the proposal passed or failed.

Used in: Proxy Proposals Table

Routing Number

Ninedigit routing number identifying the bank.

Used in: investorbankaccountlist

XV S

Select

Checkbox to select the invoice for payment.

Used in: paymentinvoicestable

Shares

Number of shares held.

Used in: Documents, Documents List, Enrollments, Holdings, Holdings List, Holdings Summary, Investor Cashouts List, investorholdingslist, investorproxylist

Shares Voted

Total number of shares that voted on this proposal.

Used in: Proxy Proposals Table

Size

File size of the document.

Used in: investorfinancialdocslist

Sponsor Organization

Organization responsible for sponsoring or supporting the offering process.

Used in: Offering Documents Table, Offerings List

Sponsorship Organization

Name of the organization providing sponsorship to this entity.

Used in: CIT Corporations List, Onboarding Documents Table

Sponsorship Organization Name

Name of the organization acting as the sponsorship entity.

Used in: Sponsorship Organizations List

Start Date

Date and time when the investor began the assessment test.

Used in: Assessment Test Reports Table

Status

The current processing status.

Used in: CIT Corporations List, Cash Payouts List, Cashout List, Complete Transactions List, Directives List, Dividend Cash Payouts, Dividends List, Document Card, Enrollments, Entity List, Investments List, Investor Cashouts List, Investor Dividends List, Offering Documents Table, Onboarding Documents Table, Proof Of Address List, Proxy Test List, Shareholder List Report Table, Sponsorship Organizations List, Staff List, Transaction List Report Table, User List, billingplanslist, investorcashoutlist, investor-dividendslist, investormessageslist, investormonthlycontributionslist, investornamechangerequestlist, investorproxylist

Subject

Subject line of the message.

Used in: investormessageslist

Submission Date

Date when the proof of address was submitted.

Used in: Proof Of Address List

Submitted By

User who submitted the transaction.

Used in: Directives List

Submitted Date

The date and time the request was submitted.

Used in: Cashout List, investorcashoutlist

Submitted On

Date the transaction was submitted for processing.

Used in: Directives List

XVI   T

Ticker

The stock ticker symbol.

Used in: Holdings Summary

Time Uploaded

The time the document was uploaded.

Used in: Document Card

Title

Title of the proxy voting event or meeting.

Used in: Proxy Test List, investorproxylist

Total Amount

Total dividend payment to this investor.

Used in: Investor Cashouts List, Investor Dividends List

Total Amount Invested

Sum of all investments received for this offering year.

Used in: Issuer Balance Report

Total Cashout Shares

Total shares cashed out under the Offering to date.

Used in: CIT Corporation Cashout, CIT Corporation Summary

Total Current Investment Amount

Total money invested in the Offering to date.

Used in: CIT Corporation Cashout, CIT Corporation Summary

Total Gain Amount

Total gains realized from the offering.

Used in: Issuer Balance Report

Total Investment Amount

Sum of all money invested in this transaction.

Used in: Directives List

Total Original Amount

The original investment amount.

Used in: Cashout List, investorcashoutlist

Total Original Cashout Amount

Total dollar amount of shares cashed out in Offering.

Used in: CIT Corporation Cashout, CIT Corporation Summary

Total Outstanding Shares

Number of shares currently held by active investors.

Used in: Issuer Balance Report

Total Payout Amount

Sum paid for all shares in the dividend event.

Used in: Dividends List

Total Pending Payment Amount

Amount not yet paid out for all eligible shares.

Used in: Dividends List

Total Shares

Total number of shares eligible to receive the dividend.

Used in: Cashout List, Directives List, Dividends List, Proxy Test List, investorcashoutlist

Total Shares Sold

Total number of shares sold in the offering.

Used in: Issuer Balance Report

Total Voted Shares

Number of shares that have been voted.

Used in: Proxy Test List

Transaction ID

The unique identifier for the transaction.

Used in: Complete Transactions List, Directives List, Investor Cashouts List, Transaction List Report Table

Transaction Type

The category of the transaction.

Used in: Complete Transactions List

Type

Indicates the category or nature of the invoice (Service, Fee).

Used in: Beneficiaries List, Cashout List, Invoices List, Transaction List Report Table, investorcashoutlist, paymentcreditlist, paymentcreditstable, paymentinvoicestable, tolinvoiceslist, tolpaymentslist

XVII   U

Unit Price

Price per unit.

Used in: tolinvoicelineitems

Uploaded By

The user who uploaded the document.

Used in: Document Card

Username Column

Unique identifier users enter to log in to the platform.

Used in: User Table

XVIII   V

Vote Status

Status of your vote (Voted or Not Voted).

Used in: investorproxylist

XIX   W

Website

URL for the organization's official website.

Used in: CIT Corporations List, Sponsorship Organizations List

XX   Y

Year

Calendar year in which the offering took place.

Used in: Offerings List

III

Common Column Types

I   Identifier Columns

Columns ending in "ID" or "Number" are unique identifiers:

- **Account ID**   Investor account identifier
- **Transaction ID**   Transaction record identifier
- **Book Number**   Certificate or holding identifier
- **Invoice No.**   Invoice identifier

II   Status Columns

Status columns show the current state of a record:

- See the Status Reference for all status values

III   Action Columns

Action columns provide buttons for available operations:

- **Action**   Contains buttons like View, Edit, Download, etc.

IV   Date Columns

Date columns track when events occurred:

- **Date**   General date of an event
- **Issued Date**   When something was issued
- **Canceled Date**   When something was canceled
- **Last Billed**   Most recent billing date

Ⅴ Amount Columns

Amount columns contain monetary values:

- **Amount** Total value

- **Paid** Amount already paid

- **Balance** Remaining amount due