CITApp Quick Reference Card

Contents

A condensed reference for the most commonly used statuses, actions, and terminology in CITApp.

I

Status Quick Reference

❙ Account Statuses

Status	Meaning
Active	Account is operational
Pending	Awaiting activation or approval
Inactive	Account is deactivated
Reference to Locked Out item Locked Out	Access temporarily blocked

I   Document Statuses

Status	Meaning
Upload Pending	Awaiting document upload
Pending Approval	Document submitted, under review
Completed	Document approved
Reference to Denied item Denied	Document rejected

II   Transaction Statuses

Status	Meaning
Pending Review	Awaiting review
Processing	Currently being processed
Completed	Successfully finished
Reference to Canceled item Canceled	Request was canceled

III   Billing Statuses

Status	Meaning
Outstanding	Balance remaining
Paid	Fully paid
Allocated	Credits applied
Active	Plan is active
Inactive	Plan is deactivated

II

Common Actions

Action	Description
View	Open detailed record view
Edit	Modify record information
Download	Export as PDF or file
Delete	Remove the record
Approve	Approve a pending item
Reject	Deny a pending item
Cancel	Cancel a request

III

Required Form Fields

I   CIT Corporation (Minimum Required)

- CIT Corporation Name
- Primary Address
- Legal Name

II   Investor (Minimum Required)

- Investor Info
- Primary Address

III   Beneficiary (Minimum Required)

- First Name
- Last Name
- Email
- Beneficiary Percentage

IV

Key Terminology

Term	Definition
Account ID	Unique investor account number
Book Number	Certificate or holding identifier
CIT Corporation	Community Investment Trust organization
Sponsor Organization	Entity sponsoring CIT corporations
Holding	Investment shares owned
Dividend	Distribution of earnings
Cashout	Request to redeem shares
Proxy	Shareholder voting event

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Navigation Shortcuts

I   Main Sections

- **Dashboard** Overview and summary
- **Accounts** Manage organizations
- **Investors** Investor records
- **Billing** Invoices and payments
- **Reports** Generate reports

II   Common Filters

- **Status** Filter by current state
- **Date Range** Filter by date period
- **Search** Find by name or ID

VI

Color Legend

Color	Meaning
Green	Success, active, complete
Orange	Pending, needs attention
Cyan	Processing, in progress
Grey	Inactive, neutral
Reference to Red item Red	Error, rejected, failed
Purple	Expired, special