

# Community Investment Trust (CIT) Documentation for Enterprise Users

- My Accounts
- Dashboard
- Profile
- User
- Account
- Document
- Offering
- Investment
- Dividend
- Transaction
- Settings
- Billing

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

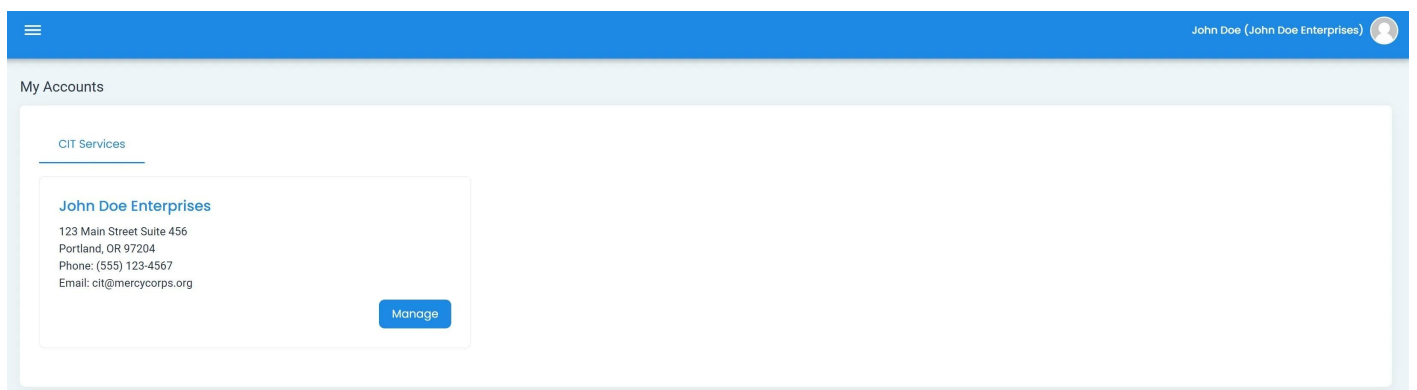
## Download the PDF

[Download PDF](#)

[Download HTML as PDF](#)

## My Accounts Category

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



CIT App, My Accounts Screen, Homepage

The main feature of the **My Accounts Page** is that it allows you [Manage Different Accounts](#)

## Note

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

For more on navigation and the primary sidebar, see [General Sidebar Navigation](#) page.

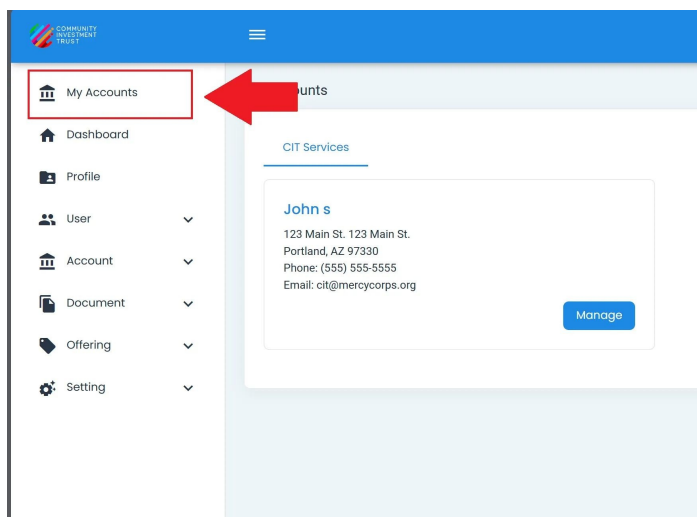
# My Accounts

## Managing Different Accounts

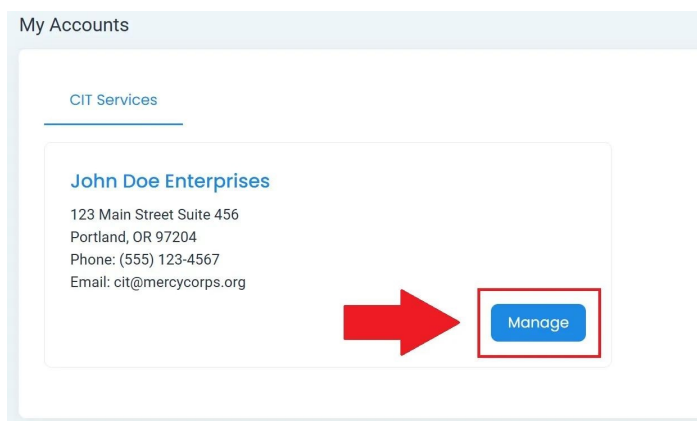
Managing accounts allows you to quickly navigate between the homepages of different accounts.

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., ( {current account being managed} ) .

It is:

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


## Dashboard

Welcome to the  section. This area provides a high-level 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.

**138**  
Communities

Provides the number of **Sponsorship Organizations**.

**42**  
CIT Corporations

Provides the number of **CIT Corporations**.



42

Pending CIT  
Corporations  
Onboarding

Provides the number of CIT Corporations that are going through the **Onboarding Process**.



Offering Year  
2010

19 Pending CIT  
Corporation Setups

Provides details for specific Offering Year with **Year filter set for 2010**.



Offering Year  
2025

42 Pending CIT  
Corporation Setups

Provides details for specific Offering Year with **Year filter set for 2025**.



Hillsboro CIT

2 Onboarding  
Documents  
Pending for  
Approval

Provides number of **Onboarding Documents** pending for approval from a specific CIT Corporation.



East Portland  
CIT (2025)

2 Offering  
Documents  
Pending for  
Approval

Provides number of **Offering Documents** pending for approval from a specific CIT Corporation.

### Clicking Tiles Will Cause Redirect

Clicking a card navigates you to the corresponding section, page, or example within the documentation.

# Dashboard Tables

The **Dashboard** section contains two tables:

- [CIT Corporation Summary Table](#)
- [CIT Corporation Cashout Table](#)

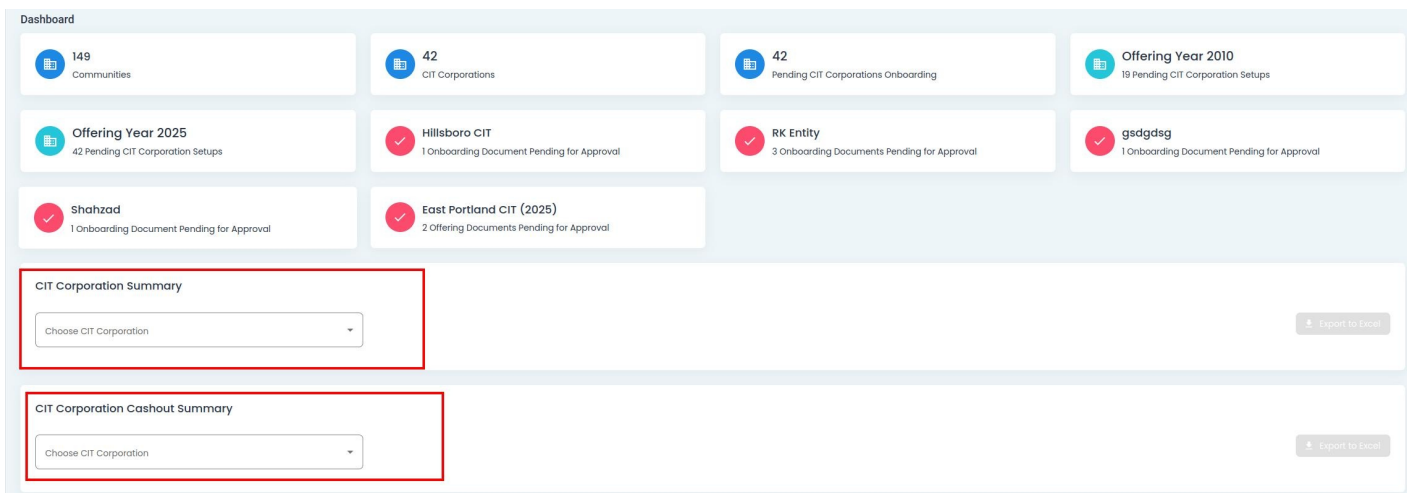
**Table Features**

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.



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](#).

**Dashboard**

**149**  
Communities

**42**  
CIT Corporations

**42**  
Pending CIT Corporations Onboarding

**Offering Year 2010**  
19 Pending CIT Corporation Setups

**Offering Year 2025**  
42 Pending CIT Corporation Setups

**Hillsboro CIT**  
1 Onboarding Document Pending for Approval

**East Portland CIT (2025)**  
2 Offering Documents Pending for Approval

**CIT Corporation Summary**

Choose CIT Corporation Export to Excel

**CIT Corporation Cashout Summary**

Choose CIT Corporation Export to Excel

Dashboard, CIT Corporation Summary Table Location

### Columns: CIT Corporation Summary Table

**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

Dashboard, CIT Corporation Summary Table Columns Explained

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.
- 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](#):

The screenshot shows a dashboard with several widgets. The 'CIT Corporation Cashout Summary' widget is highlighted with a red box. It contains a dropdown menu labeled 'Choose CIT Corporation' and an 'Export to Excel' button.

Dashboard, CIT Corporation Cashout Table Location

## Columns: CIT Corporation Cashout Table

The screenshot shows the 'CIT Corporation Cashout Summary' table with the following columns highlighted by a red box:

Offering Year	Number of Investors	Number of Investors Resubscribe	Reason Percentage	Number of Shares	Total Amount Cashed Out	Total Original Investment Amount	Total Amount of Appreciation
2025	2	1	Education 50%, Emergency 50%	8,381	\$128.56	\$35.00	\$93.56

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](#)

[How to Export Table](#)

## How to Filter Table

**Step 1:** Locate the CIT Corporation Summary Dropdown



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

Dashboard, CIT Corporation Summary Dropdown Expanded



## ✔ Table Expands

The table will expand to show the CIT Corporation details.

CIT Corporation Summary

Choose CIT Corporation  
East 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
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  file once the table is filtered by **CIT Corporation**.

**To do so:**

**Step 1:** Find and Click the [Export to Excel](#) button

CIT Corporation Summary


Choose CIT Corporation  
East 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
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

Dashboard, CIT Corporation Summary Table Export Button Location

## ✔ Export File Successfully Downloaded

The  file will be downloaded to your default download location.

## Profile

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

## Table of Contents

[Profile Location](#)

[Profile Information](#)

[Upload Logo](#)

## [Profile Location](#)

The [Profile](#) page is the third item listed in the [Primary Sidenavavigation](#) menu.

### Don't see the Primary Sidenavavigation menu?

See [How to Toggle the Primary Sidenavavigation 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

- [Red](#) items are *required* and cannot be left blank.
- [Blue](#) items are *optional*.

## [Upload Logo](#)

### To Upload:

1. Find the [Upload Logo](#) section.

../\_static/solo\_app/Profile/upload-logo-section/upload-section-location.jpeg



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 located at the top-left of the page:

**Profile**

**Info**

Name\*

Website


Billing Email

Company Email

Phone Number

**Logo**

[Upload Logo](#)



**Primary Address**

Street Name\*

Suite/Apt Number

City\*

State\*

Zip Code\*

**Mailing Address**

(Street name is empty. Defaulting to primary address.)

Street Name

Suite/Apt Number

City

State

Zip Code

[Save Changes](#)

Name and Contact Information Location

The following fields can be edited:

- **Item Required: Name**
- **Website**
- **Billing Email**
- **Company Email**
- **Phone Number**

## Primary Address

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

Profile

**Info**

Name\*  
CIT Services

Website  
www.investcit.org


Billing Email  
fakeEmail@email.com

Company Email  
info2@email.com

Phone Number  
(555) 555-5555

**Logo**

Upload Logo



**Primary Address**

Street Name\*  
123 Main St.

Suite/Apt Number  
123 Main St.

City\*  
Portland

State\*  
Arkansas

Zip Code\*  
97330

**Mailing Address**  
(Street name is empty. Defaulting to primary address.)

Street Name  
97330

Suite/Apt Number

City  
Scottsdale

State  
Wyoming

Zip Code  
85251

Save Changes

Primary Address Location

### 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:

- **Item Required: Street Name**
- **Suite/Apt Number**
- **Item Required: City**
- **Item Required: State**
- **Item Required: Zip Code**

## 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.

Profile

**Info**

Name\*  
CIT Services

Website  
www.investcit.org

Billing Email  
fakeEmail@email.com

Company Email  
info2@email.com

Phone Number  
(555) 555-5555

**Primary Address**

Street Name\*  
123 Main St.

Suite/Apt Number  
123 Main St.


City\*  
Portland

State\*  
Arkansas

Zip Code\*  
97330

**Logo**

Upload Logo



**Mailing Address**  
(Street name is empty. Defaulting to primary address.)

Street Name  
97330

Suite/Apt Number

City  
Scottsdale

State  
Wyoming

Zip Code  
85251

Save Changes

Mailing Address Location

### 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**

## 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](#)

[Columns: User List Table](#)

[Search and Filter Options](#)

[Status Options](#)

[View User Details and Other Remaining Sections](#)

## Hover for Page Preview

Hover over the links for a page preview.

The screenshot shows a table with columns: Contact Name, Contact Email, Number of Visits, Last Logged In, Status, and Action. The table lists several staff members, including Anass Zolgami, Carl Padeyn, John Doe, John Service, John Vo, Mohd Shazad, and Ponkaj CIT. A tooltip is visible over the 'Staff List Homepage' link, containing the text: 'Need help finding the Staff Homepage? See [Staff Homepage Location](#) for more information.' Below this, there is a section titled 'Hover for Page Preview' with a 'Click to show' button.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:48 PM	Active	<a href="#">Staff List Homepage</a>
Carl Padeyn	cpadeyn@transferonline.com	7	12/18/2024 @ 11:47 AM	Active	<a href="#">Staff List Homepage</a>
John Doe	doevay@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	<a href="#">Staff List Homepage</a>
John Service	ct@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	<a href="#">Staff List Homepage</a>
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	<a href="#">Staff List Homepage</a>
Mohd Shazad	mohd.shazad@techahedcorp.com	288	01/06/2025 @ 05:19 AM	Active	<a href="#">Staff List Homepage</a>
Ponkaj CIT	ponkaj.poh@techahedcorp.com	0		Activation Pending	<a href="#">Staff List Homepage</a>

## User List Homepage

The [Users](#) section opens up to the [User List](#) table:

The screenshot shows the 'User List' homepage. It features a 'Filter' section with a dropdown menu set to 'All' and a search box labeled 'Search User Name/Email'. Below the filter is a table with columns: Contact Name, Contact Email, Number of Visits, Last Logged In, Status, and Action. The table lists several users, including AJ Sharma, Alex Williams, Allison Anderson, Amanda Castillo, Anass Zolgami, and Arthur Murphy.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
AJ Sharma	AJ@yomail.com	1	10/31/2024 @ 07:51 AM	Active	<a href="#">User List</a>
Alex Williams	alex.williams@tolinvestcit.com			Activation Pending	<a href="#">User List</a>
Allison Anderson	allison.anderson@tolinvestcit.com			Activation Pending	<a href="#">User List</a>
Amanda Castillo	amanda.castillo@tolinvestcit.com			Activation Pending	<a href="#">User List</a>
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 05:46 AM	Active	<a href="#">User List</a>
Arthur Murphy	arthur.murphy@tolinvestcit.com			Activation Pending	<a href="#">User List</a>

Users, User list Table

## Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

## Columns: User List Table

User List

Filter

Status: All

Search User Name/Email

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
AJ Sharma	AJ@yomail.com	1	10/31/2024 @ 07:51 AM	Active	
Alex Williams	alex.williams@tolinvestcit.com			Activation Pending	

User, User, Column Options

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**
- **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**
- **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.



User List

Filter

Status

All

All

Active

Pending Activation

Inactive

Locked Out

Search User Name/Email

	Number of Visits	Last Logged In	Status
Allison Anderson allison.anderson@tolinvestcit.com	1	10/31/2024 @ 07:51 AM	Active
Amanda Castilla amanda.castilla@tolinvestcit.com			Activation Pending
			Activation Pending
			Activation Pending

User, User Homepage, Status Filter Dropdown

3. The table updates automatically to display matching users.

## [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

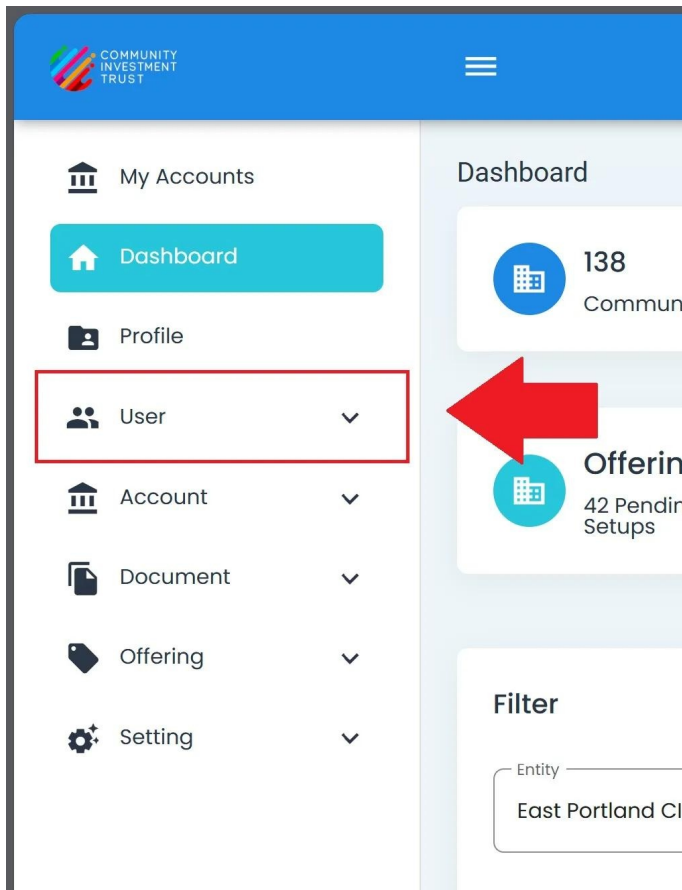
### To Find the Staff List Homepage:

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


#### Don't see the sidebar?

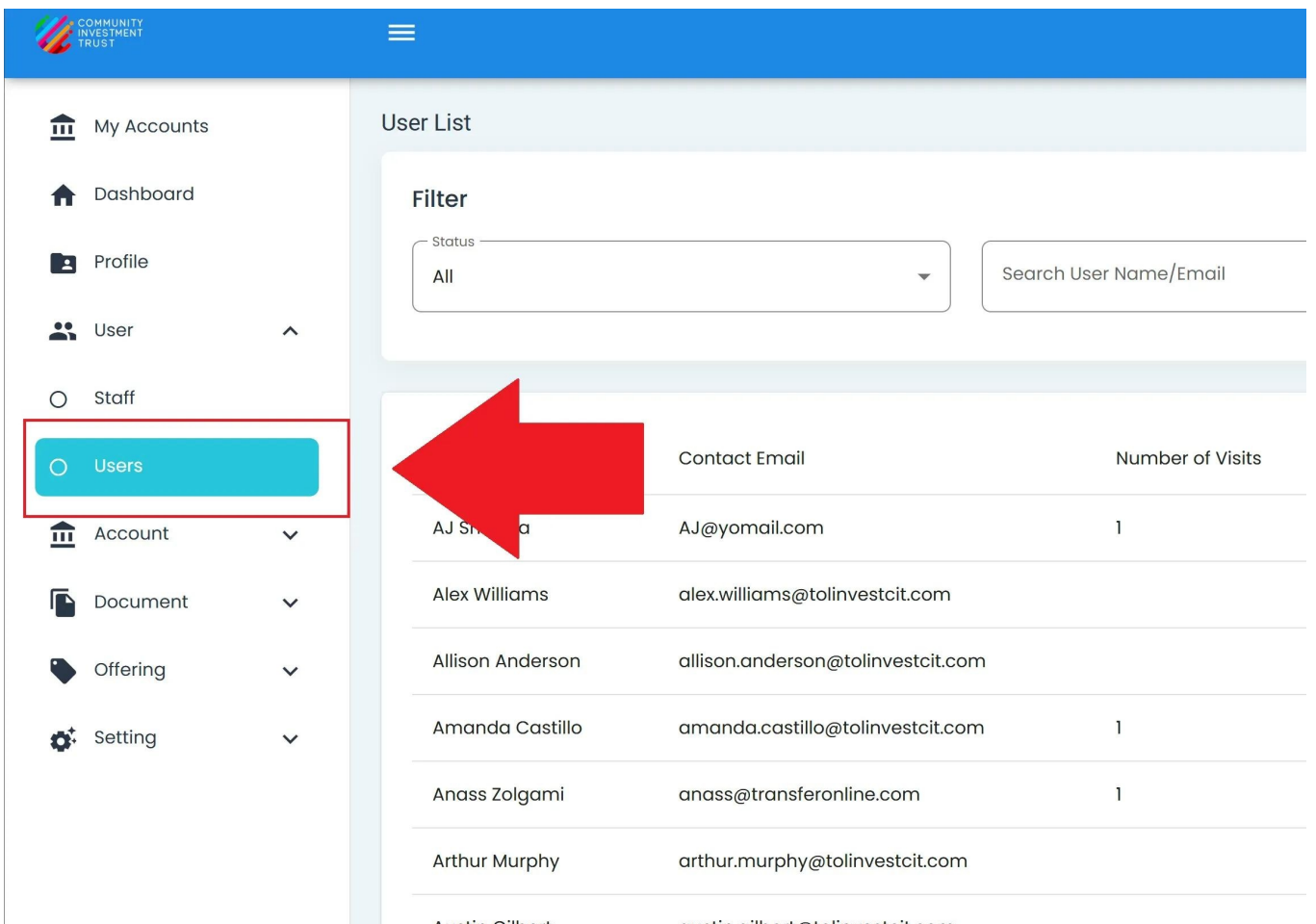
See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **User** category.




User, Staff Primary Sidenav Location

3. Select  from the dropdown.



# Staff

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

## Table of Contents

[Staff List Homepage](#)



[Features: Staff List Table](#)

- [Columns: Staff List Table](#)

[Filter by Status](#)



















[View Staff Details and Other Remaining Sections](#)

## Staff List Homepage

The  section opens up to the  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 Padeyn	cpadeyn@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	pankajjoshi@techaheadcorp.com	0		Activation Pending	  

## Staff Homepage

### Need help finding the Staff Homepage?

See [Staff Homepage Location](#) for more information.

## Hover for Page Preview

Hover over the links for a page preview.

The screenshot shows a table with the following data:

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:48 PM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Carl Padejn	cpadejn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
John Doe	doe@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
John Service	cs@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:19 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Pankaj CIT	pankaj.poshi@techaheadcorp.com	0		Action Pending	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

Below the table, a tooltip titled "Staff Homepage #" is visible. It contains the following text:

Need help finding the Staff Homepage?  
See [Staff Homepage Location](#) for more information.

Hover for Page Preview Click to show

## 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**, OF
- **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:

## Staff List

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 Podayn	cpodayn@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	johm@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	pankajjoshi@techaheadcorp.com	0		Activation Pending	  

## 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**
- **Locked Out**

## Staff List

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	pankajjoshi@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

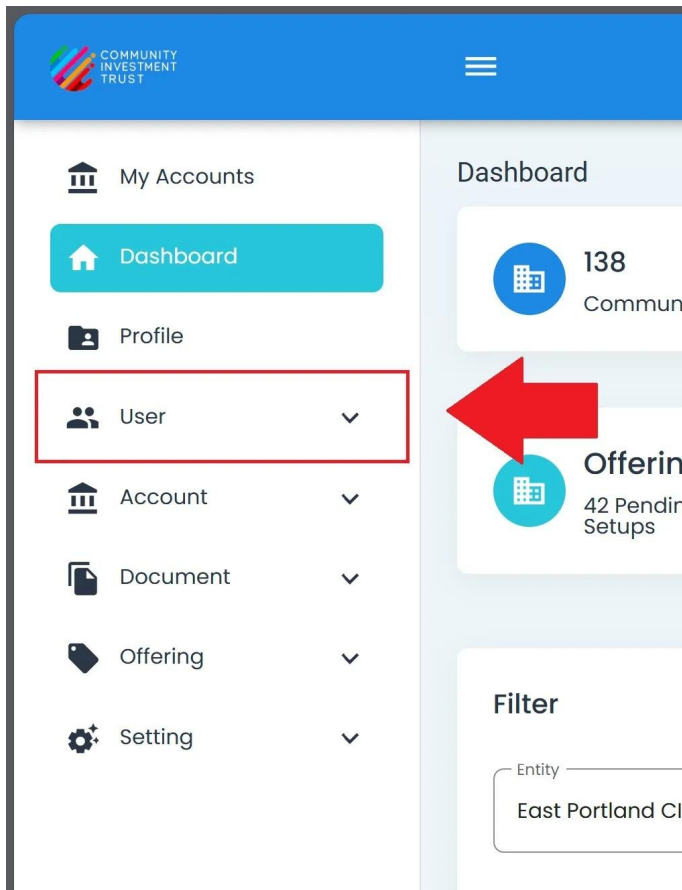
### To Find the Staff List Homepage:

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


#### Don't see the sidenav?

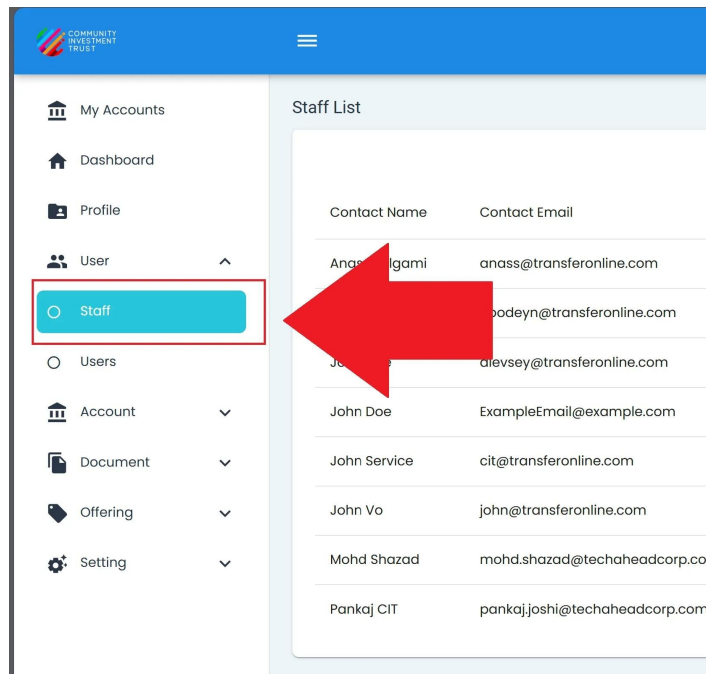
See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **User** category.



User, Staff Primary Sidenav Location

3. Select  from the dropdown.



Staff Homepage

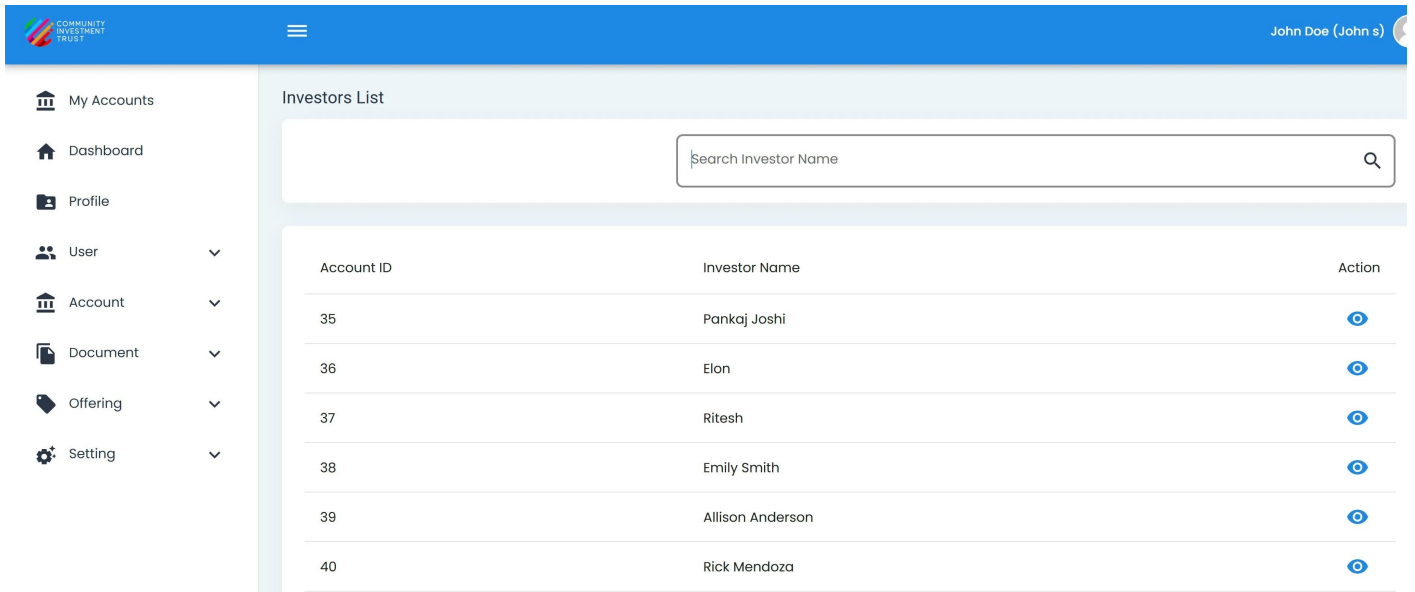
## Account

The following  are included in the  category:

- [Investors](#)

# Investors

The [Investors List](#) section provides a comprehensive view of all investors in the system.



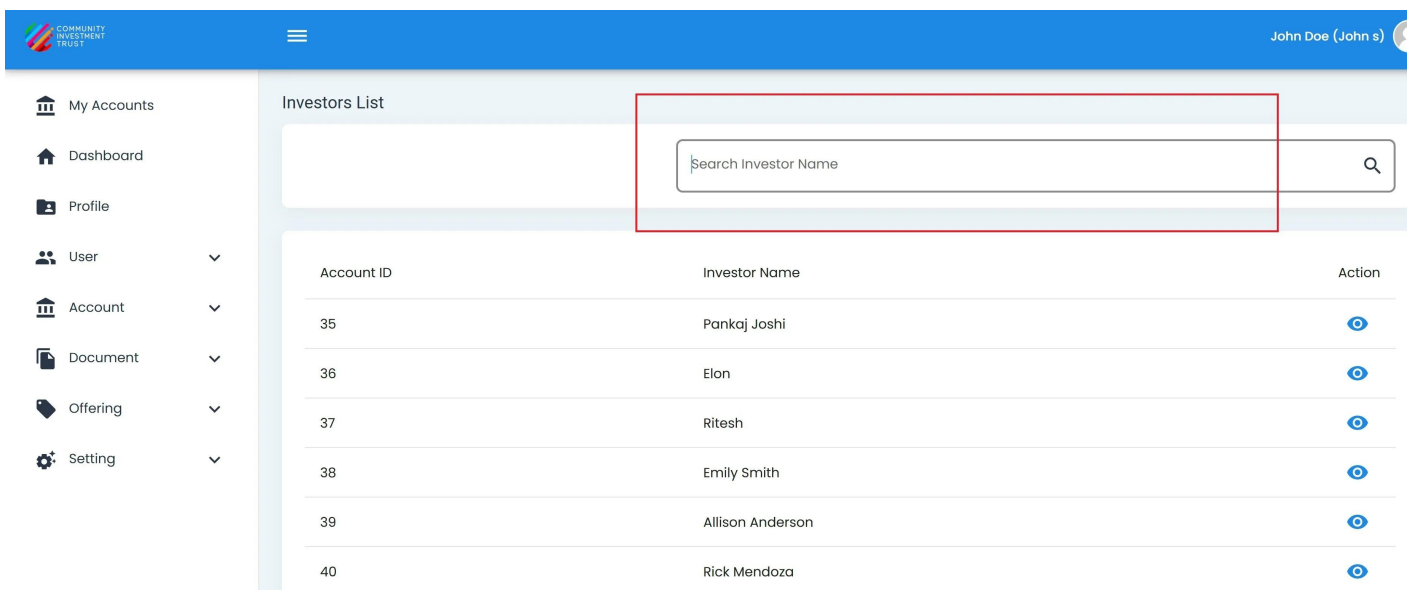
Investors List Homepage

## 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:

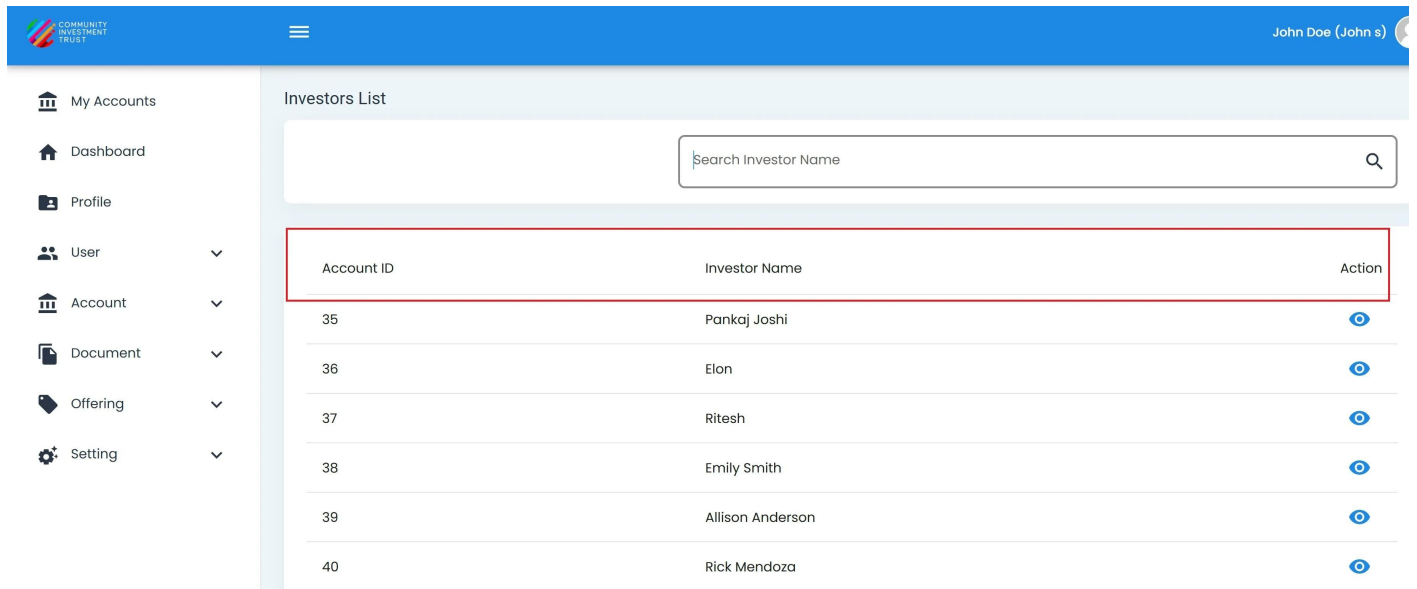


Investors List, Search Bar Location



# Investors Table

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



COMMUNITY INVESTMENT TRUST | John Doe (John s)

My Accounts | Dashboard | Profile | User | Account | Document | Offering | Setting

Investors List

Search Investor Name

Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Investors List, Table Column Names

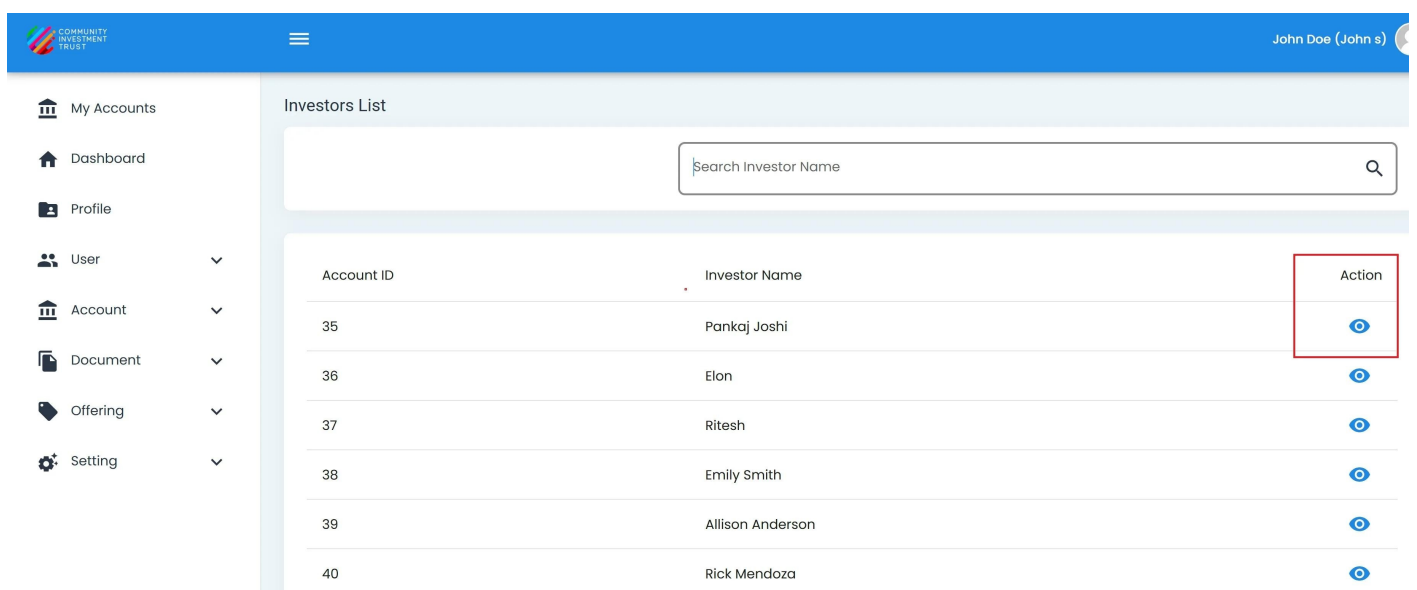
## Table Columns

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:



COMMUNITY INVESTMENT TRUST | John Doe (John s)

My Accounts | Dashboard | Profile | User | Account | Document | Offering | Setting

Investors List

Search Investor Name

Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Investors List, Action Column Location

## Available Actions

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

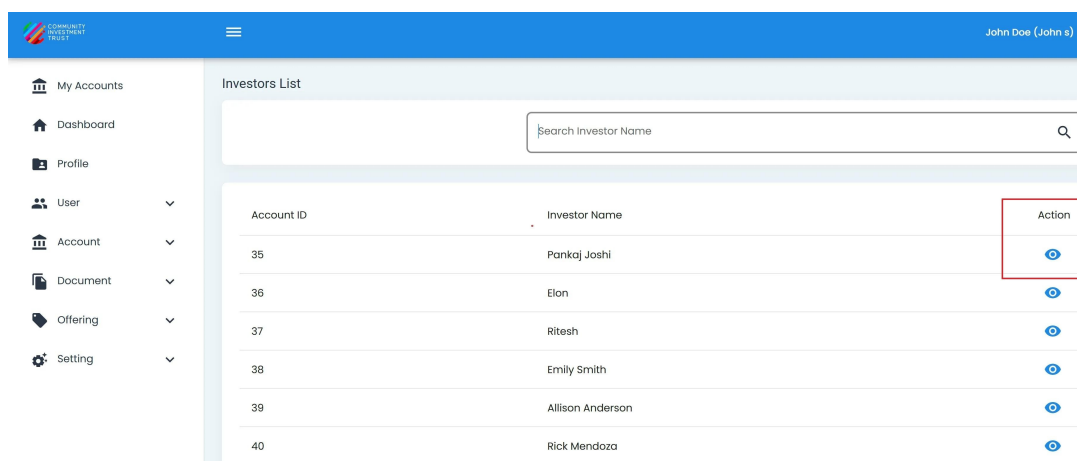
- [View More Details](#) - View and edit detailed information about the Investor

## 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.

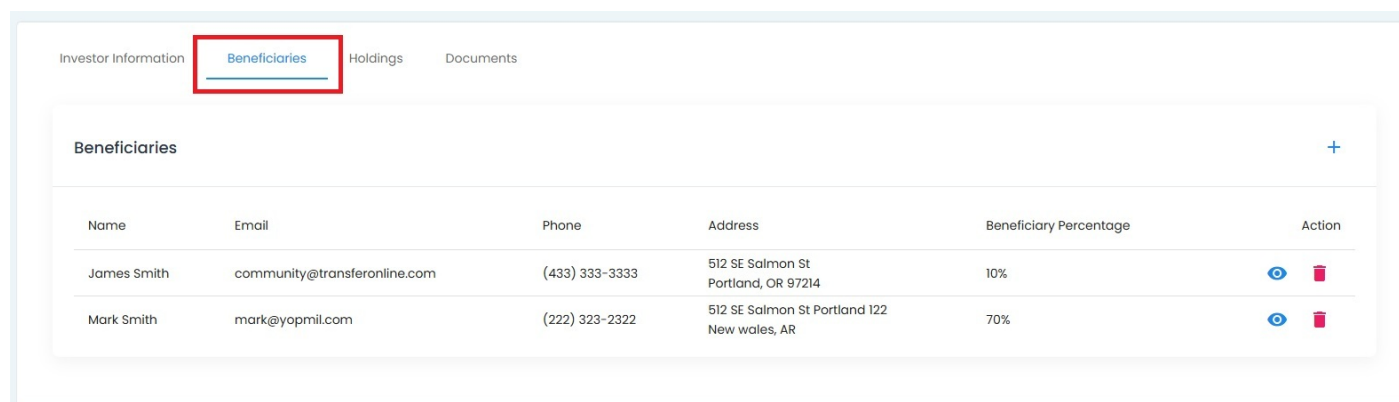


Investors List, View Action Location

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.







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.

Investor Information **Beneficiaries** Holdings Documents

Beneficiaries +

Name	Email	Phone	Address	Beneficiary Percentage	Action
James Smith	community@transferonline.com	(433) 333-3333	512 SE Salmon St Portland, OR 97214	10%	 
Mark Smith	mark@yopmil.com	(222) 323-2322	512 SE Salmon St Portland 122 New wales, AR	70%	 

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:

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

Beneficiaries

Email	Phone	Address	Beneficiary Percentage	Action
community@transferonline.com	4333333333	512 SE Salmon St Portland, OR 97214	10%	
mark@yopmil.com	2223232322	512 SE Salmon St Portland 122 New wales, AR	70%	

Investor Details, Add Beneficiary Button Location

2. The Add Beneficiary popup will appear.

Add Beneficiary Popup

3. Place cursor in desired field.

4. Fill in relevant information.

**Possible fields include:**

- o Item Required: First Name (required)
- o Item Required: Last Name (required)
- o Item Required: Email (required)
- o Phone (optional)
- o Item Required: Beneficiary Percentage (required)
- o Address information (optional)

5. Fill in necessary information, which can include the following

6. Click the [Save](#) button to add the beneficiary.

## 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

#### [Investor Details Tab](#)

- [Location: Investor Details Tab](#)
- [Investor Information Section](#)
  - [Available Information](#)
    - [Personal Information](#)
- [Primary and Mailing Address](#)

## [Location: Investor Details Tab](#)

The [Investor Details](#) tab will be the second tab that appears when [Viewing Investor Information](#).

Investor: Pankaj Joshi

[Investor Information](#) [Beneficiaries](#)

#### Investor Info

Name\*  SSN

Date Of Birth

#### Primary Address

Street Name\*

Suite/Apt Number

City\*

State\*  Zip Code\*

#### Mailing Address

(Street name is empty. Defaulting to primary address.)

Street Name

Suite/Apt Number

City

State  Zip Code

Investor Details Tab Location

## Note

- **Item Required: 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:

- **Item Required: Investor Info**
- **Item Required: Primary Address**
- **Mailing Address**

Investor Information   Beneficiaries

**Investor Info**

Name\*  
Pankaj Joshi

SSN  
222-22-2222

Date Of Birth  
9/29/1994

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.

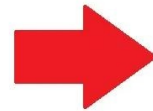
2. Type the changes you want to make.
3. Click the [Save Changes](#) button at the bottom-right of the page.

Code\*  
204

### Mailing Address

(Street name is empty. Defaulting to primary address.)

State  
[Select] ▼



Investor Details Save Changes

#### Note

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

### [Holdings List Tab](#)

The [Holdings List](#) tab provides a quick overview of all holdings associated with a chosen [Investor](#).

#### Contents

##### [Holdings List Tab](#)

- [Location: Holdings Tab](#)
- [Columns: Holdings List Table](#)
- [Relevant Sections](#)

### [Location: Holdings Tab](#)

The [Holdings List](#) tab will be the third tab that appears when [Viewing Investor Information](#).

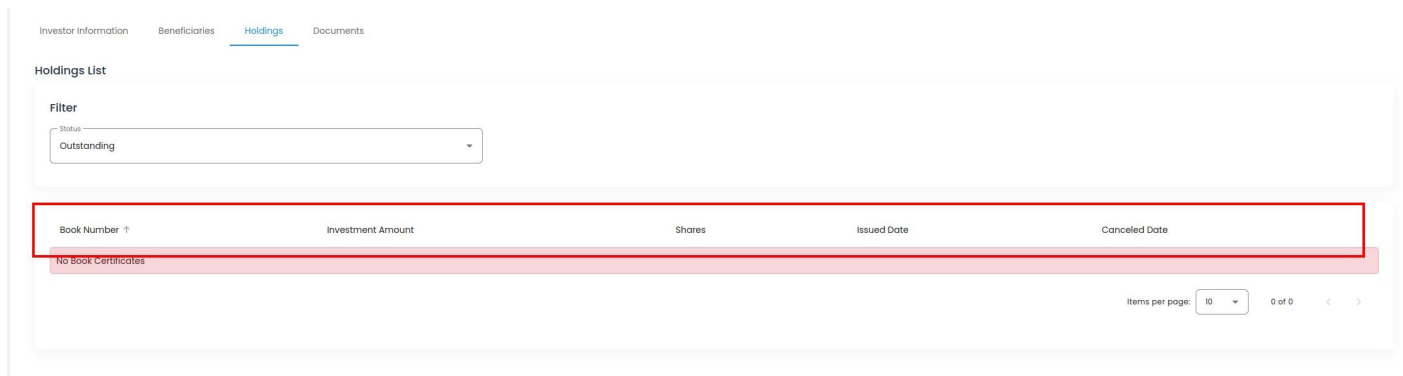


Account, Investors, Investor Information, Holdings Tab

## 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.



Account, Investors, Investor Information, Holdings Tab, Columns Explained

## Relevant Sections

- See [Filter Holdings by Status](#) for more information on how to filter holdings by status.

### Filter Holdings by Status

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

### To Filter Holdings by Status:

1. Find the **Status** column.



Holdings List


Filter  
Status  
Outstanding

Book Number	Investment Amount ↑	Shares	Issued Date	Canceled Date
No Book Certificates				

Items per page: 10 0 of 0

Account, Investors, Investor Information, Holdings Tab, Status Filter Dropdown

2. Select the status you want to filter by.

 **Available Statuses** >

✓ Action Complete

The table should update 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**

[Documents List Tab](#)

- [Location: Documents Tab](#)
- [Columns: Documents List Table](#)
- [Search for Documents](#)
- [Other Actions](#)
  - [Available Actions](#)

[Location: Documents Tab](#)

Investor Information Beneficiaries Holdings Documents

Offering Documents

Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date
No documents					

Items per page: 10

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.

Offering Documents

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
No documents						

Items per page: 10 0 of 0

Account, Investors, Investor Information, Documents Tab, Columns Explained

## Search for Documents

1. Place cursor in search field.

Offering Documents

Search

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date
No documents					

Account, Investors, Investor Information, Documents Tab, Search Location

2. Start typing the name of the **File Name** you want to search for.

Investor Information | Beneficiaries | Holdings | Documents

**Investor info**

Name: [Redacted] ERI: [Redacted]

Date Of Birth: [Redacted] Email: [Redacted]

Phone: [Redacted]

**Primary Address**

Street Name: Portland St.

Suite/Apt Number: [Redacted]

City: Portland

State: Oregon Zip Code: 97236

**Mailing Address**

(Street name is empty. Defaulting to primary address.)

Street Name: [Redacted]

Suite/Apt Number: [Redacted]

City: [Redacted]

State: [Redacted] Zip Code: [Redacted]







## Other Actions

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

Investor Information   Beneficiaries   Holdings   Documents

Offering Documents

East-CIT

ID	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
23	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/22/2025	 
22	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/22/2025	 
21	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/22/2025	 

Items per page: 10   1 - 3 of 3

Account, Investors, Investor Information, Documents Tab, Action Column Location

## 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.

## 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](#)

[Location: CIT Corporation Onboarding](#)

[Table: Onboarding Documents List](#)

[Onboarding Documents Table](#)

## Features: CIT Corporation Onboarding

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

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

- [Quickly view important information about each CIT Corporation](#)
- [Access in-depth 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 **Corporation Onboarding** section can be found under the **Document** category.

COMMUNITY INVESTMENT TRUST

My Accounts

Dashboard

Profile

User

Account

Document

**CIT Corp. Onboarding**

CIT Corp. Offering

Investor Documents

Offering

Setting

### CIT Corporation Onboarding Documents

Status: All

ID	Sponsor Organization
4	Community Investment Trust
	Community Investment Trust
	Community Investment Trust
12	Community Investment Trust
13	Community Investment Trust
18	Replicator Community
20	PT

CIT Corporation Onboarding, Location

## Table: Onboarding Documents List

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

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 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

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 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.

## 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.

The screenshot shows a web interface with a table of onboarding documents. At the top, there are two dropdown menus: 'Status' and 'Offering Year', both currently set to 'All'. A search bar labeled 'Search CIT Corporation' is to the right. The table below has columns: ID, Offering Year, Sponsor Organization, CIT Corporation, Due Less than 30 Days, and Document Con. The first three rows of data are visible.

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Con
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8
3	2025	Community Investment Trust	Willamette CIT	0	0 of 8

2. Select the desired status from the dropdown.

This screenshot is identical to the previous one, showing the same table and filters. The 'Status' dropdown menu is highlighted with a red box, indicating the step of selecting a status.

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Con
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8
3	2025	Community Investment Trust	Willamette CIT	0	0 of 8

## 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 [Corporation Onboarding](#) page section:

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	
--	--	--	--	--	--	--	--

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 Onboarding Documents Table: Columns Explained

CIT Corporation Onboarding Documents

Status: All

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 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](#)

[Offering Documents Table](#)

## [Features: CIT Corporation Offering](#)

The [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 in-depth 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	

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

CIT Corporation Offering Documents

Filter +

Status: All Offering Year: All Search CIT Corporation

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	

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

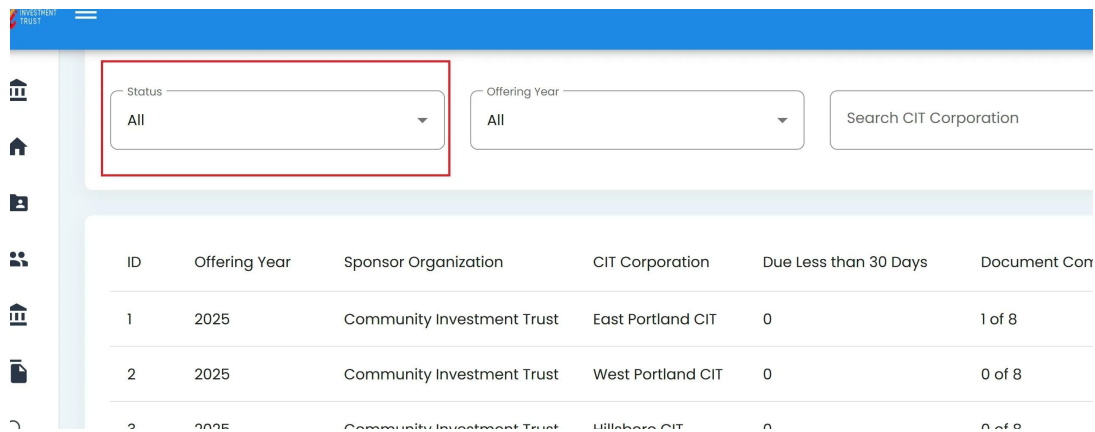
### Status Filter Options

The [Offering Documents Table](#) can be filtered by the following **Status** options:

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

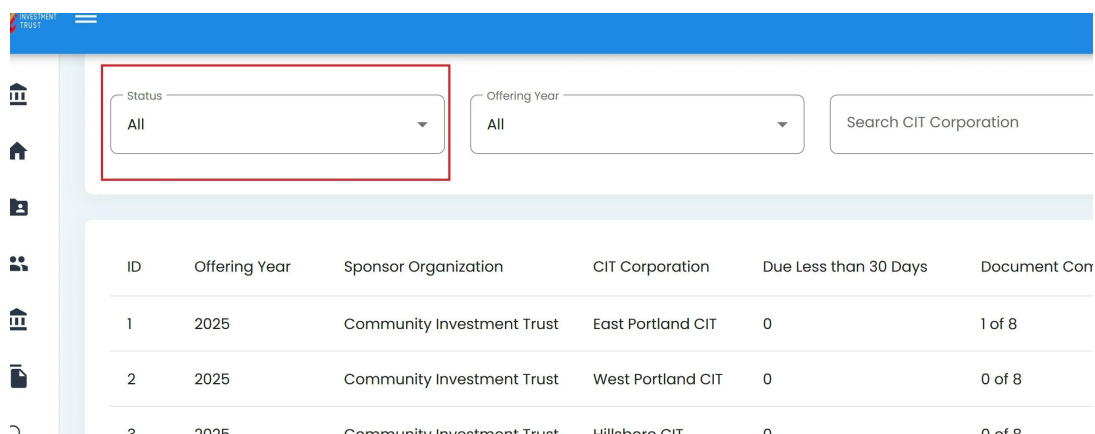
### How to Filter by Status

1. Find and select the Status dropdown.



Status Filter Location

2. Select the desired status from the dropdown.



Status Dropdown Options

✔ 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 requirements

## 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.

Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$20.21	\$335.00	\$35.00	\$0.00	01/10/2025	
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	Tsg gqgqfsafa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	

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.

ID	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
29	Tom Cruse	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/23/2025	<a href="#">👁</a> <a href="#">↓</a>
28	Tom Cruse	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/23/2025	<a href="#">👁</a> <a href="#">↓</a>
27	Tom Cruse	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/23/2025	<a href="#">👁</a> <a href="#">↓</a>

Investor Documents, Homepage and Location

## Table: Investor Documents

The **Investor Documents Table** is the primary interface for accessing investor-related files:

ID ↑	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
11	Janet Murphy	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/16/2025	<a href="#">👁</a> <a href="#">↓</a>
12	Janet Murphy	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/16/2025	<a href="#">👁</a> <a href="#">↓</a>
14	Janet Murphy	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/17/2025	<a href="#">👁</a> <a href="#">↓</a>

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







## Table Columns Explained

Investor Documents

Filter

CIT Corporation  
East Portland CIT

Search

ID ↑	Investor	CIT Corporation	Offering Year	Filename	Document Type	Signed Date	Action
11	Janet Murphy	East Portland CIT	2025	CIT Investor Slides Final- 2024-2025.pdf	Offering Document	01/16/2025	 
12	Janet Murphy	East Portland CIT	2025	2025 Annual Update to Offering Circular 123024.pdf	Offering Document	01/16/2025	 
14	Janet Murphy	East Portland CIT	2025	East-CIT-2025-Subscription.pdf	Subscription Agreement/PPM	01/17/2025	 

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.

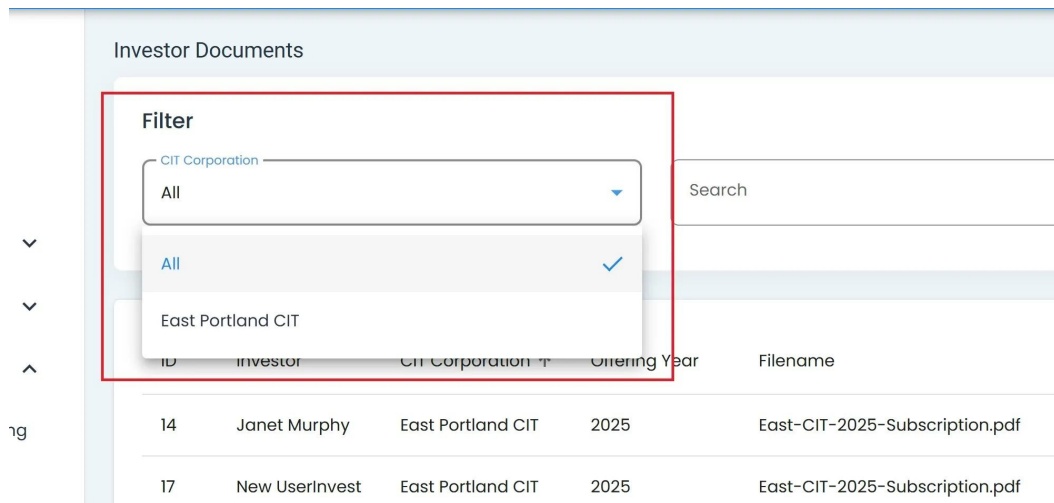
Investor Documents

Filter

CIT Corporation  
All

Search

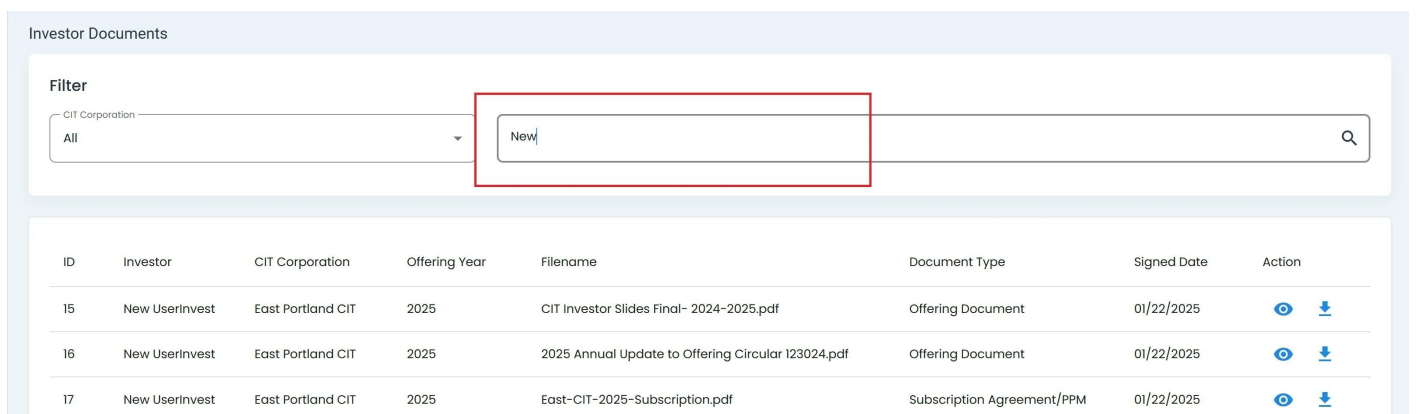
2. Select the desired CIT Corporation or **All** from the dropdown.



## How to Search Investor Documents

To search for a specific document or investor:

1. Find the **Search** bar.



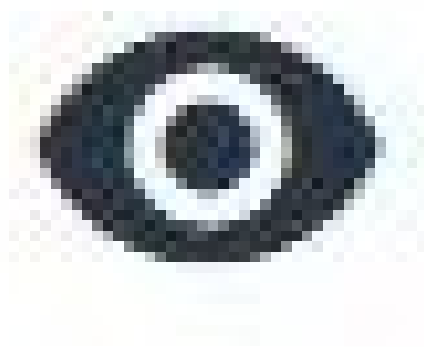
2. Search by **Investor** Name.
3. Press **Enter** or click the search icon to perform the search.

## 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/solo_app/Document/icons/download-document-icon.jpeg  
:width: 50%  
:align: center
```

## View More Details: Documents

The [View More Details](#) pages for the [Boarding 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:

CIT Corporation Offering Documents: East Portland CIT, Year: 2025

Status 7 Document(s) left

Status	Count	Document Title	File Name	Uploaded On	Uploaded By	Due On	Approval Status	Actions
All	8	Appraised value	File: EsopwAgreement.pdf	October 14, 2024 @ 3:55 PM	John Service	October 15, 2024	Approved	Messages (0)
Pending Upload	6	Complete						
Pending Approval	2	Board resolutions for share price change	File: Document 2.pdf	October 17, 2024 @ 3:40 PM	John Service	December 1, 2024	Pending for Approval	Messages (0)
Completed	1	Stock Offering Circular				December 1, 2024	Overdue	Messages (0)
		Subscription Agreement				December 1, 2024	Overdue	Messages (0)
		Shareholder Agreement	File: Magic Partnership LLC Subscription Agreement.pdf	October 14, 2024 @ 5:15 PM	Entity Admin	December 1, 2024	Pending for Approval	Messages (0)
		Investor Slides				December 1, 2024	Overdue	Messages (0)
		Financial projections				December 1, 2024	Overdue	Messages (0)
		Invoice Paid				December 31, 2024	Overdue	Messages (0)



## Looking for an Overview?

See [cit-corporation-onboarding-page](#) or [CIT Corporation Offering](#)

## Layout Explanation

### View Details: Tabs Explained

The screenshot displays the 'CIT Corporation Onboarding Documents: East Portland CIT' interface. On the left, a 'Status' sidebar is highlighted with a red box, containing the following filters: 'All' (4), 'Upload Pending' (1), 'Pending Approval' (0), and 'Completed' (3). The main content area shows a list of documents. The first document, 'License Agreement between CIT Services LLC and CIT Corporation', is marked as 'Complete' and has 12 messages. The second document, 'CIT Corporation Bylaws & Articles of Incorporation', is also marked as 'Complete' and has 2 messages. The third document, 'DPLC Agreement between bank and Sponsor Organization', is marked as 'Expired' and 'Pending for Approval', with 2 messages. A blue button in the top right corner indicates '1 Document(s) left'.

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

The screenshot displays the 'CIT Corporation Offering Documents: East Portland CIT, Year: 2025' interface. On the left, a 'Status' sidebar is highlighted with a red box, containing the following filters: 'All' (8), 'Pending Upload' (5), 'Pending Approval' (2), and 'Completed' (1). The main content area shows a list of documents. The first document, 'Appraised value', is marked as 'Complete' and has 9 messages. The second document, 'Board resolutions for share price change', is marked as 'Pending for Approval' and has 1 message. The third document, 'Stock Offering Circular', is marked as 'Document Pending Upload' and 'Overdue'. A blue button in the top right corner indicates '7 Document(s) left'.

Each card will display information about a document, including:

- 
- 
- and
- 
- 
- (If Applicable)
- 

## Available Actions

Each  has its own set of available actions:

- [All Status](#)
- [Upload Pending Status](#)
- [Pending Approval Status](#)

## Offering

The following  are included in the  category:

- [Offerings](#)
- [Enrollments](#)

## Offerings

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

### Table of Contents

#### [Offerings](#)

- [Location: Offerings](#)
- [Table: Offerings List](#)
- [Columns: Offerings List Table](#)

## [Location: Offerings](#)

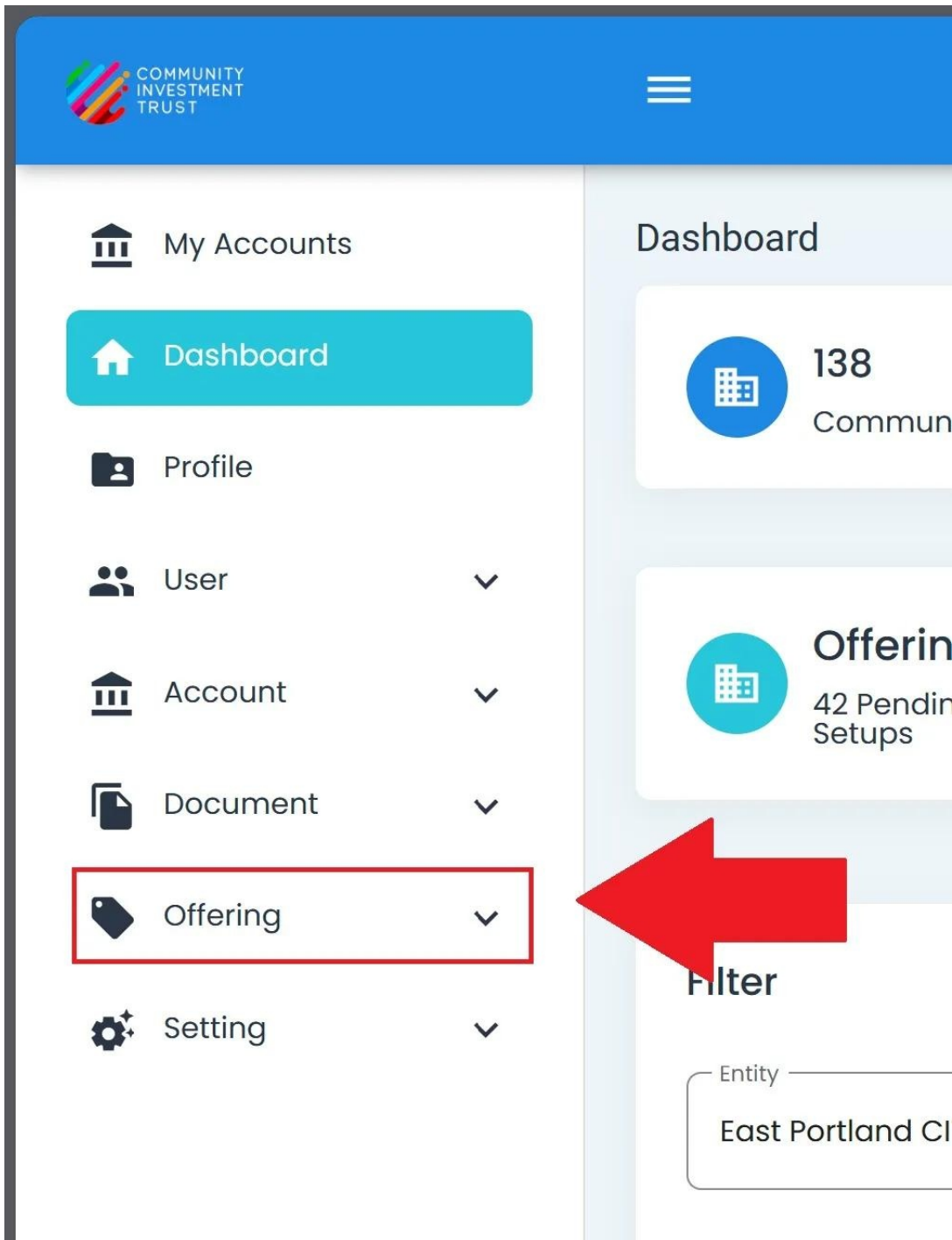
### To Find the Offerings List Homepage:

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

#### Don't see the sidenav?

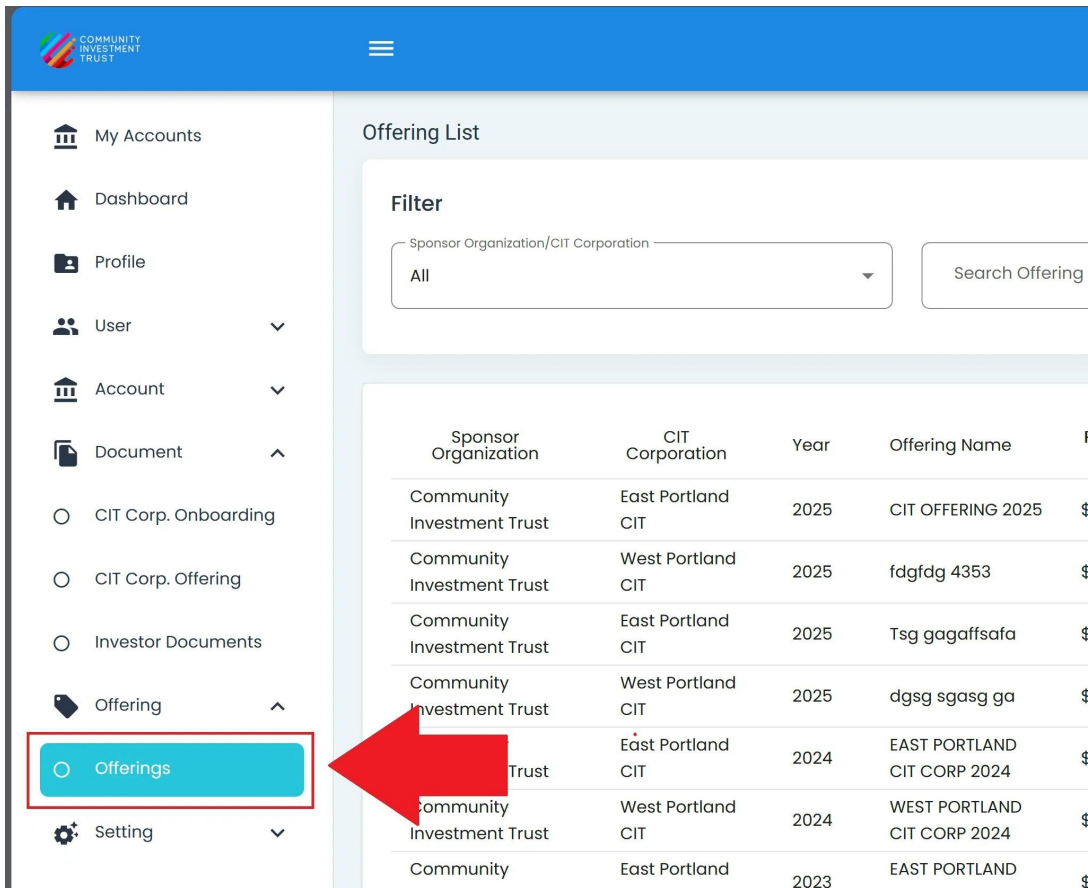
See [How to Toggle Primary Sidebar](#) for more information.

2.  the dropdown for the  category.



Offering, Offerings Primary Sidenav Dropdown Location

3.   from the dropdown.



Offering, Offerings Homepage

## Table: Offerings List

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

Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$20.21	\$335.00	\$35.00	\$0.00	01/10/2025	
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsafa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	
Community Investment Trust	West Portland CIT	2025	dgsg sgasg ga	\$22.00	\$0.00	\$0.00	\$0.00	01/09/2025	
Community Investment Trust	East Portland CIT	2024	EAST PORTLAND CIT CORP 2024	\$19.65	\$4,095.00	\$520.00	\$125.00	01/01/2024	
Community Investment Trust	West Portland CIT	2024	WEST PORTLAND CIT CORP 2024	\$15.86	\$0.00	\$0.00	\$0.00	01/01/2024	
Community Investment Trust	East Portland CIT	2023	EAST PORTLAND CIT CORP 2023	\$19.02	\$0.00	\$50.00	\$0.00	12/30/2022	

Offering, Offerings Homepage, Offerings List table

## Columns: Offerings List Table

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

## Offering List

### Filter

Sponsor Organization/CIT Corporation

All

Search Offering Name, Sponsor Organization, CIT Corporation, and Year



Sponsor Organization	CIT Corporation	Year	Offering Name	Price Per Share	Pending Amount	Investment Amount	Original Cashout Amount	Active Date	Action
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$20.21	\$335.00	\$335.00	\$0.00	01/10/2025	
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsafa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	
Community Investment Trust	West Portland CIT	2025	dgsg sgasg ga	\$22.00	\$0.00	\$0.00	\$0.00	01/09/2025	
Community Investment Trust	East Portland CIT	2024	EAST PORTLAND CIT CORP 2024	\$19.65	\$4,095.00	\$520.00	\$125.00	01/01/2024	
Community Investment Trust	West Portland CIT	2024	WEST PORTLAND CIT CORP 2024	\$15.86	\$0.00	\$0.00	\$0.00	01/01/2024	
Community Investment Trust	East Portland CIT	2023	EAST PORTLAND CIT CORP 2023	\$19.02	\$0.00	\$50.00	\$0.00	12/30/2022	

Offering, Offerings Homepage, Offerings List table

- **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

## Enrollments

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

### Contents

#### Enrollments

- [Enrollments Homepage Location](#)
- [Related Sections](#)

## Enrollments Homepage Location

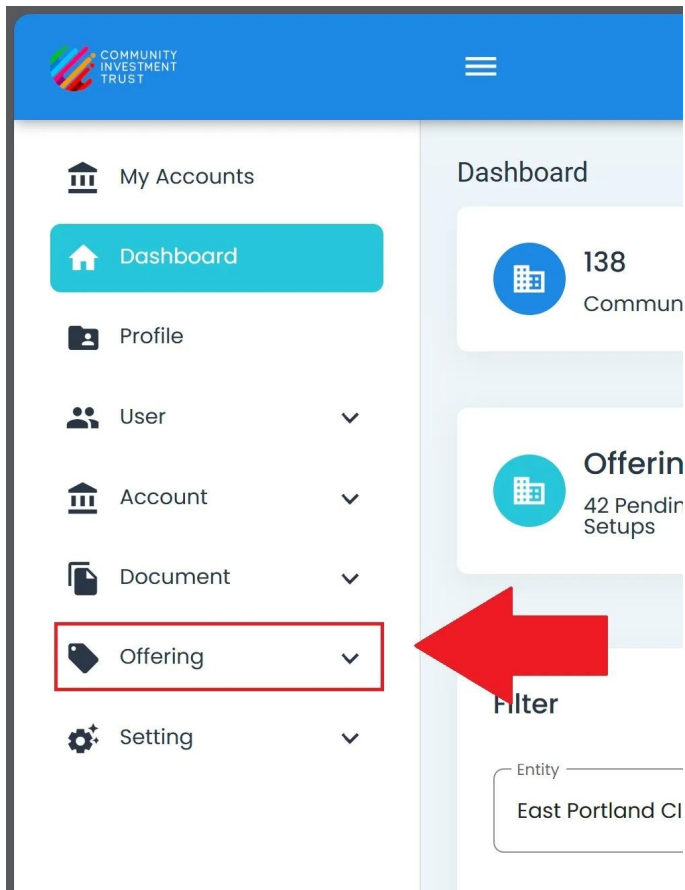
### To Find the Enrollments List Homepage:

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

#### Don't see the sidenav?

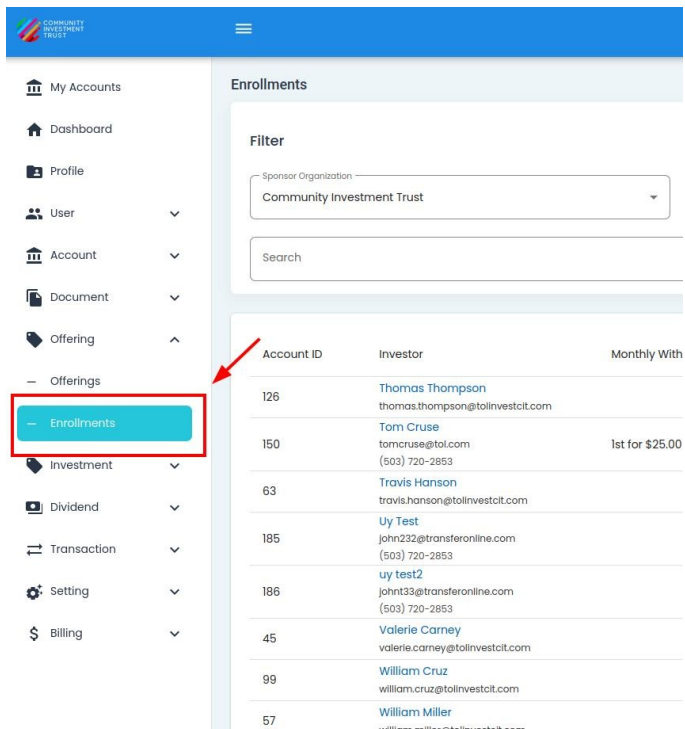
See [How to Toggle Primary Sidebar](#) for more information.

2. **SELECT** the dropdown for the **Offering** category.



Offering, Enrollments Primary Sidenav Location

3.   from the dropdown.



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

- [Enrollments Table](#)
  - [Columns: Enrollments Table](#)
  - [Available Enrollment Statuses](#)

Enrollments

Filter

Sponsor Organization: Community Investment Trust | CIT Corporation: East Portland CIT | Offering: CIT OFFERING 2025 (2025) | Status: All

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@tollinvestit.com								Holding - Eligible
39	Allison Anderson allison.anderson@tollinvestit.com								Holding - Eligible
125	Caleb Hall caleb.hall@tollinvestit.com								Holding - Not Eligible
119	Chad Ballard chad.ballard@tollinvestit.com								Holding - Not Eligible
61	Elizabeth Marshall elizabeth.marshall@tollinvestit.com								Holding - Eligible
50	Gary Palmer gary.palmer@tollinvestit.com								Holding - Eligible
--	Jennifer Allen								

Offering, Enrollments, Enrollments Table, Columns Explained

## Columns: Enrollments Table

The [Columns](#) for the [Enrollments](#) table can be found at the top of the table:

Enrollments

Filter

Sponsor Organization: Community Investment Trust | CIT Corporation: East Portland CIT | Offering: CIT OFFERING 2025 (2025) | Status: All

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@tollinvestit.com								Holding - Eligible
39	Allison Anderson allison.anderson@tollinvestit.com								Holding - Eligible
125	Caleb Hall caleb.hall@tollinvestit.com								Holding - Not Eligible
119	Chad Ballard chad.ballard@tollinvestit.com								Holding - Not Eligible
61	Elizabeth Marshall elizabeth.marshall@tollinvestit.com								Holding - Eligible
50	Gary Palmer gary.palmer@tollinvestit.com								Holding - Eligible
--	Jennifer Allen								

Offering, Enrollments, Enrollments Table, Columns

The [Enrollments](#) table will have the following columns:

- [Account ID](#)
- [Investor](#)
- [Monthly Whiteboard](#)
- [Heading for Whiteboard](#)

- A2P Processing
- Avoiding Share Resource
- Investment Amount
- Shares
- Hold Investment/Cashout
- Status

## Available Enrollment Statuses

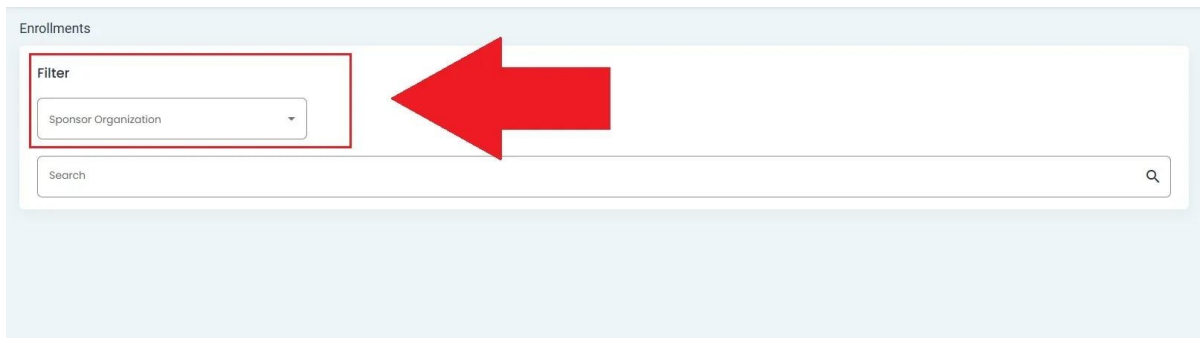
The  Enrollments table allows you view any  Investors with the following status:

- All
- Test Account
- Option: Active
- Option: In Process
- Stop Investment
- Cashout
- ACH Failed
- Holding (both  Eligible and  Not Eligible )
- Admin Stop

## Using Enrollments Filters

### To Filter Enrollments:

1. Find the  Sponsor Organization dropdown.

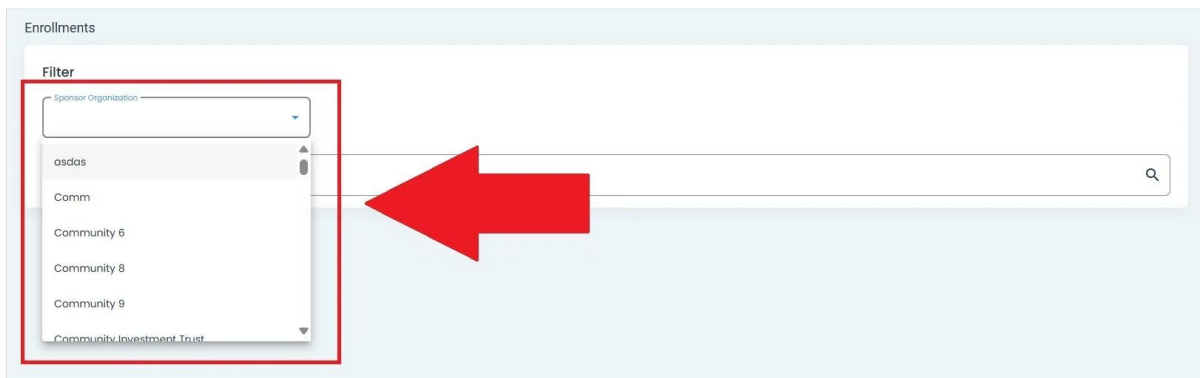


Offering, Enrollments, Sponsor Organization Filter Location

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

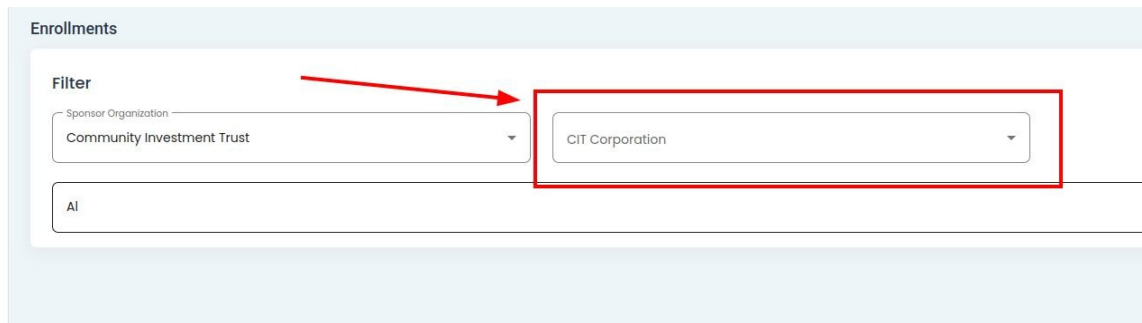






Offering, Enrollments, Filter Dropdown Options

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



Offering, Enrollments, Filter Selection Results With Two Dropdowns

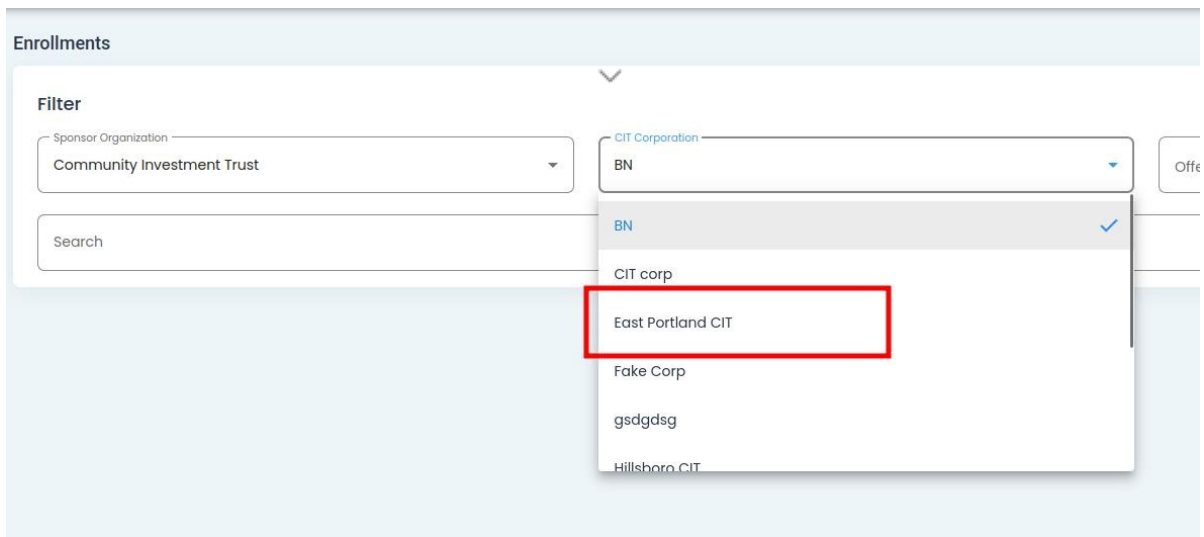
**Note**

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.

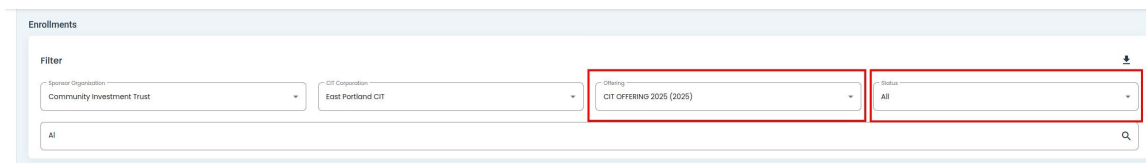
3. Select the organization (e.g., CIT Corporation).



Offering, Enrollments, CIT Corporation Filter Selection

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

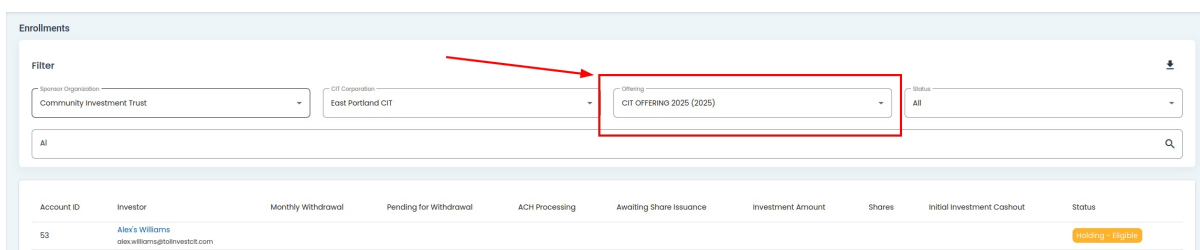
- The **Offering** dropdown will populate with the first option on the list.
- The **Status** dropdown will populate with the first option on the list ( **All** ).



Offering, Enrollments, Offering and Status Dropdowns Appear

#### 4. Select the Offering

1. Find and **SELECT** the **Offering** dropdown.



Offering, Enrollments, Offering Dropdown Location

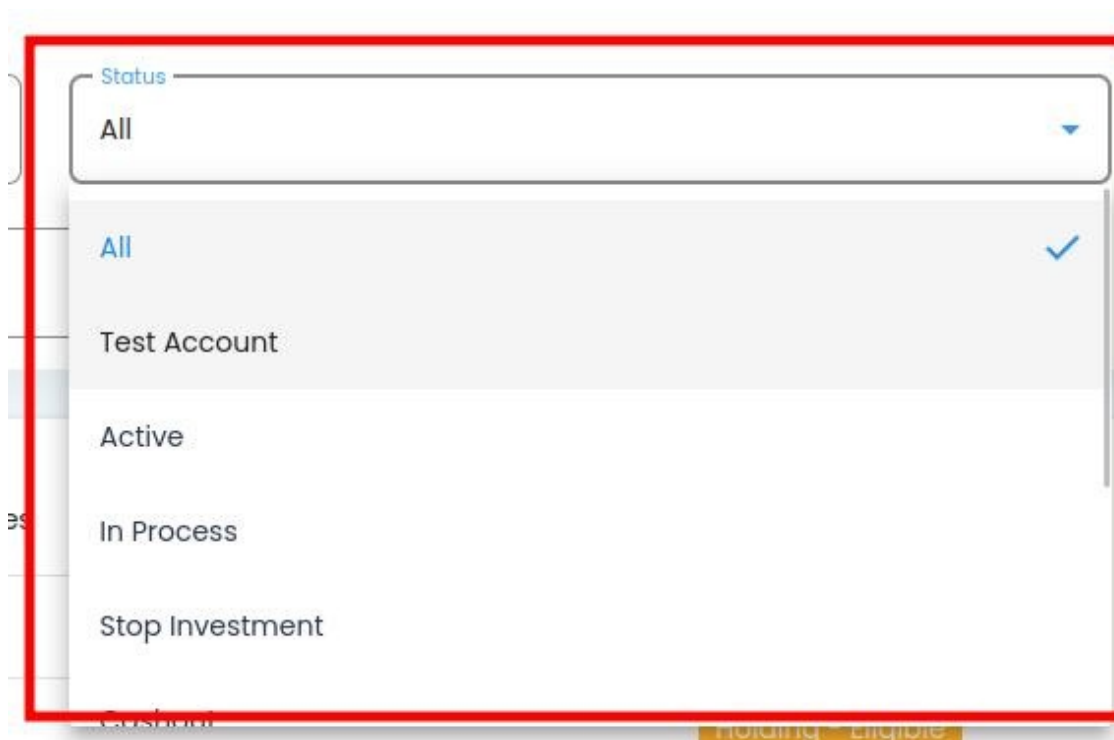
2. **SELECT** an offering from the offering dropdown.



Offering, Enrollments, Offering Dropdown Selection

## 5. Select the Status

1. Find and  the  dropdown.



Offering, Enrollments, Status Dropdown Location

2.  a status from the status dropdown.

**Enrollments**

**Filter**

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Search

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	A
53	Alex's Williams alex.williams@tolinvestcit.com				
39	Allison Anderson allison.anderson@tolinvestcit.com				
92	Amanda Castillo amanda.castillo@tolinvestcit.com				
51	Arthur Murphy arthur.murphy@tolinvestcit.com				
73	Austin Gilbert austin.gilbert@tolinvestcit.com				

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: Enrollments Table

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

**Enrollments**

**Filter**

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Offering: CIT OFFERING 2025 (2025)

Status: All

AI

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal ↑	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
53	Alex's Williams alex.williams@tolinvestcit.com							
39	Allison Anderson allison.anderson@tolinvestcit.com							
125	Caleb Hall caleb.hall@tolinvestcit.com							
119	Chad Ballard chad.ballard@tolinvestcit.com							
61	Elizabeth Marshall elizabeth.marshall@tolinvestcit.com							
50	Gary Palmer gary.palmer@tolinvestcit.com							
96	Jennifer Allen jennifer.allen@tolinvestcit.com							

## How To: Search for Investors

### To Search for Investors:

1. Place your cursor in the search bar.

The screenshot shows the 'Enrollments' page with a search bar containing the text 'AI'. The search bar is highlighted with a red box. Below the search bar is a table with columns: Account ID, Investor, Monthly Withdrawal, Pending for Withdrawal, ACH Processing, Awaiting Share Issuance, Investment Amount, Shares, Initial Investment Cashout, and Status. The table contains three rows of data.

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout	Status
53	Alex's Williams alex.williams@tolinvestcit.com								Holding - Eligible
39	Allison Anderson allison.anderson@tolinvestcit.com								Holding - Eligible
vic	Caleb Hall								Holding - Eligible

Offering, Enrollments, Search Bar Location

2. Type the name of the **Investor** to see their **Status** and overview.



### Search Results Automatically Populate



The screenshot shows the 'Enrollments' page with the search bar containing the text 'AI'. The search bar is highlighted with a red box. Below the search bar is a table with columns: Account ID, Investor, Monthly Withdrawal, Pending for Withdrawal, ACH Processing, and Awaiting Share Issuance. The table contains seven rows of data.

Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance
53	Alex's Williams alex.williams@tolinvestcit.com				
39	Allison Anderson allison.anderson@tolinvestcit.com				
125	Caleb Hall caleb.hall@tolinvestcit.com				
119	Chad Ballard chad.ballard@tolinvestcit.com				
61	Elizabeth Marshall elizabeth.marshall@tolinvestcit.com				
50	Gary Palmer gary.palmer@tolinvestcit.com				
96	Jennifer Allen jennifer.allen@tolinvestcit.com				

Offering, Enrollments, Search Example, Name in Field

3. **CLICK** the **Investor** to view their [Investor Details](#).

## Investment

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

### Contents

[Investment](#)

- [Investments Homepage Location](#)
- [Investments List Table Overview](#)
- [Using Investments Filters](#)


## [Investments Homepage Location](#)

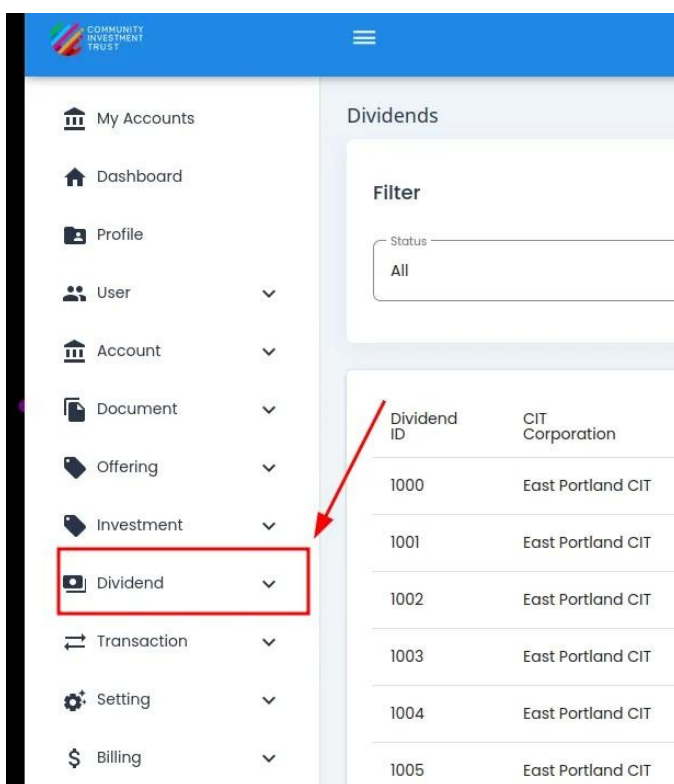
### To Find the Investments List Homepage:

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.



Investment Category, Primary Sidenav Location

3. Select  from the dropdown.

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981

Investment, Investments, Primary Sidenav Location

## Investments List Table Overview

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

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
New UserInvest						
1113	East Portland CIT	newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583 Carl Podeyn	2025	February 15, 2025	\$50.00	Open

Investment, Investments List Table

## Using Investments Filters

### To Filter Investments:

1. Locate the filter section at the top of the table.

Investments

**Filter**

Status: Open    CIT Corporation: All    Search:

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	<span>Open</span>
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	<span>Open</span>
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	<span>Open</span>
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	<span>Open</span>
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	<span>Open</span>
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583 Carl Podeyn	2025	February 15, 2025	\$50.00	<span>Open</span>

Investments Table Filter Section Highlighted

2. Click on the Status dropdown to filter by status.

Investments

**Filter**

Status: Open    CIT Corporation: All    Search:

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	<span>Open</span>
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	<span>Open</span>
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	<span>Open</span>
1116	East Portland CIT	Tom Cruse tomcruse@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	<span>Open</span>
1112	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	2025	March 01, 2025	\$50.00	<span>Open</span>
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583 Carl Podeyn	2025	February 15, 2025	\$50.00	<span>Open</span>

Investments Status Dropdown Location

The status dropdown will expand, showing available status options:

Investments

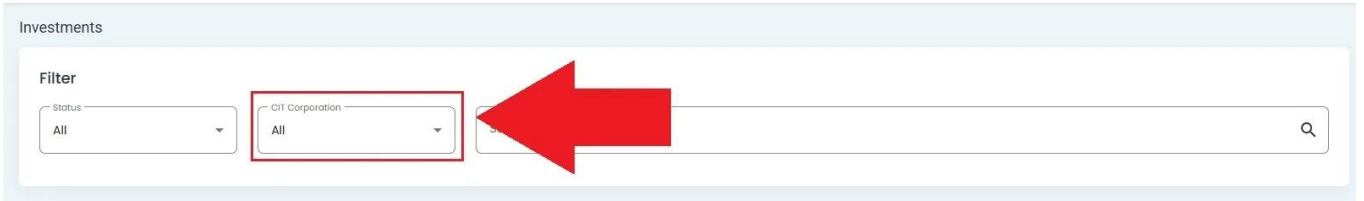
**Filter**

Status: Open    CIT Corporation: All    Search:

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	<span>Open</span>
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15, 2025	\$50.00	<span>Open</span>



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



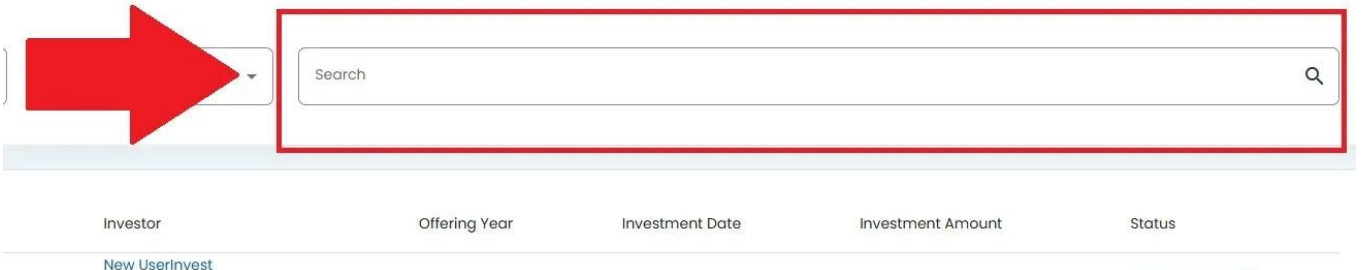
CIT Corporation Dropdown Location

The dropdown will expand, showing available organization options:



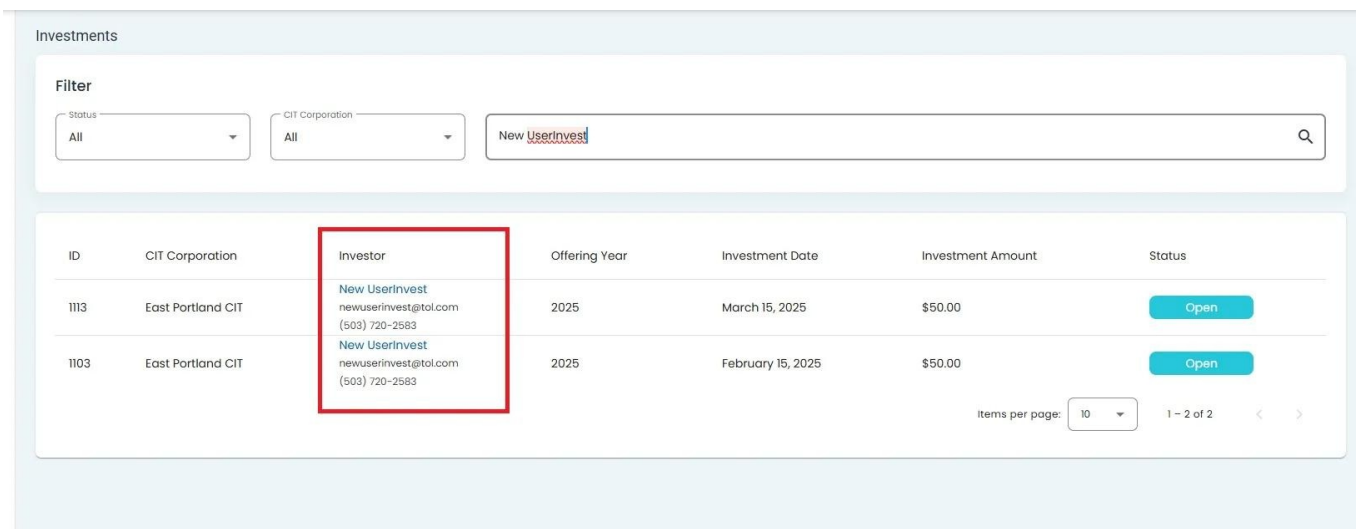
CIT Corporation Dropdown Expanded

4. Click the search icon to apply filters.



Search Icon Location

Your filtered results will appear:




## [Investments](#)

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

### Contents

[Investments](#)

## Dividend

The following  are included in the Dividend category:

- [Dividends](#)
- [Cash Payouts](#)

## [Dividends](#)

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

### Contents

#### [Dividends](#)

- [Dividends Homepage Location](#)
- [Dividends List Table](#)
- [Columns: Dividends List Table](#)
- [Using Dividends Filters](#)
- [How to: Filter by Status](#)
- [How to: Filter by Sponsor Organization](#)
- [How to: Filter by CIT Corporation](#)



## [Dividends Homepage Location](#)

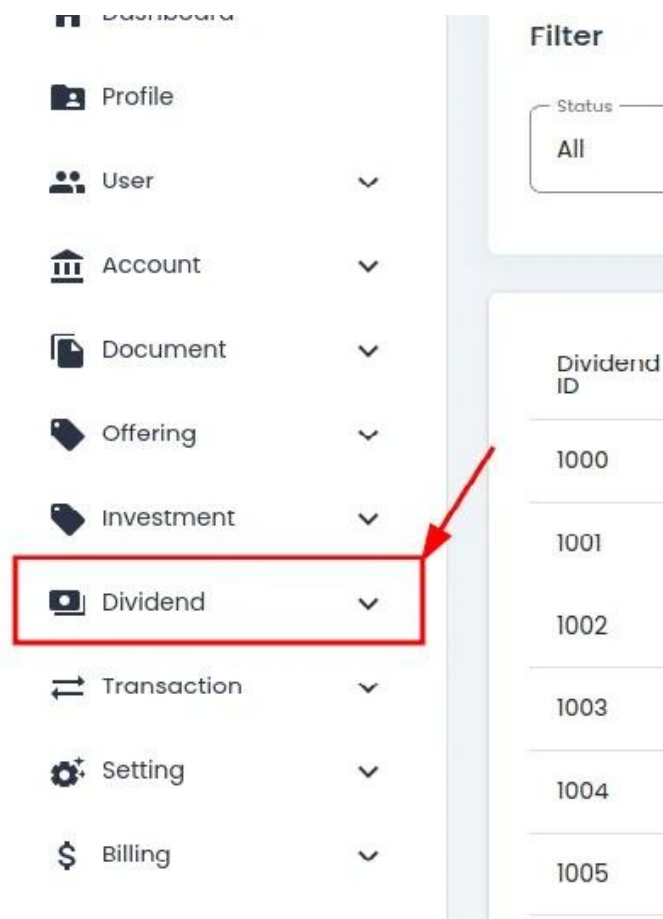
### To Find the Dividends List Homepage:

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

#### Don't see the sidenav?

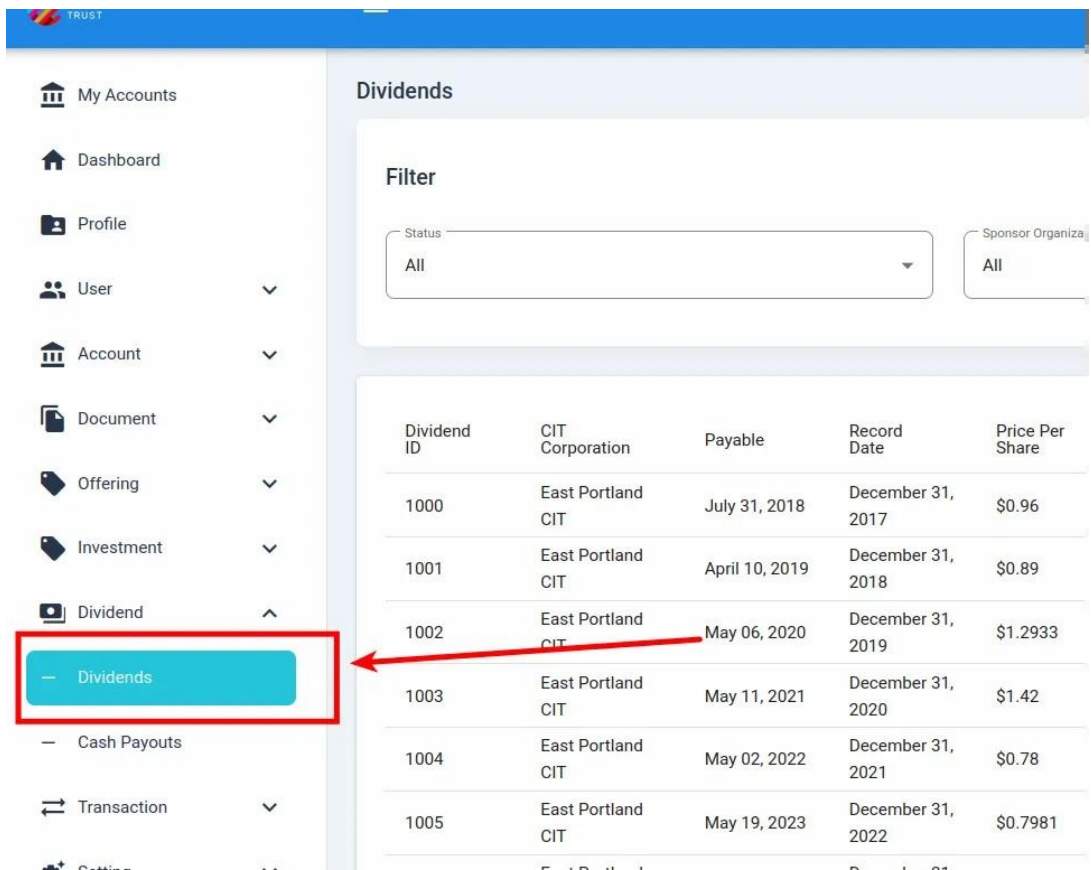
See [How to Toggle Primary Sidebar](#) for more information.

2.  the dropdown for the  **Dividend** category.



Dividend Category, Primary Sidenav, Dropdown Location

3.   from the dropdown.



Dividend, Dividends Homepage, Primary Sidenav Location

## Dividends List Table

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

Dividends

Filter

Status: All

Sponsor Organization: All

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	
1006	East Portland CIT	May 17, 2024	December 31, 2023	\$0.79	33,512.2014	\$26,474.65	\$0.00	1	Complete	
1007	East Portland CIT	February 28, 2025	February 13, 2025	\$1.65	11,655.48	\$19.24	\$4.20	7	Pending	

Items per page: 10 1 - 8 of 8

Dividends Homepage

## 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
- 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.

Dividends

**Filter**

Status: All ▼      Sponsor Organization: All ▼

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	

Dividends Table Filter Section Highlighted

## How to: Filter by Status

1. Find and CLICK on the Status dropdown located above the table.

Dividends

**Filter**

Status: All ▼      Sponsor Organization: All ▼

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	

Dividends, Status Dropdown Location

2. SELECT the Status you want to filter by from the dropdown.

Dividends

Filter

Status: All

Sponsor Organization: All

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	

Dividends, Status Dropdown Expanded

## How to: Filter by Sponsor Organization

1. Find and **CLICK** on the **Sponsor Organization** dropdown.

Dividends

Filter

Status: All

Sponsor Organization: All

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	
1005	East Portland CIT	May 19, 2023	December 31, 2022	\$0.7981	29,750.27747	\$23,744.48	\$0.00	1	Complete	

Sponsor Organization Dropdown Location

2. **SELECT** the **Sponsor Organization** you want to filter by from the dropdown.

Dividends

Filter

Status: All

Sponsor Organization: All

Community Investment Trust

Dividend ID	CIT Corporation	Payable	Record Date	Share	Shares	Amount	Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	

Sponsor Organization Dropdown Expanded

## 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.

Dividends

Filter

Status: All

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	

CIT Corporation Dropdown Location

2. **SELECT** the **CIT Corporation** you want to filter by from the dropdown.

Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Investors	Status	Action
per 31,	\$0.96	137.5	\$132.00	\$0.00	1	Complete	
per 31,	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	

CIT Corporation Dropdown Expanded

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

## Cash Payouts

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

### Contents

#### Cash Payouts

- [Cash Payouts Homepage Location](#)
- [Cash Payouts List Table](#)
- [Columns: Cash Payouts List Table](#)
- [How to: View Details About the Investor for a Cash Payout](#)
- [Using Cash Payouts Filters](#)
- [How to: Filter by Status](#)
- [How to: Filter by Sponsor Organization](#)
- [How to: Search for Cash Payout Information](#)
- [How To: View More Information](#)

## Cash Payouts Homepage Location

### To Find the Cash Payouts List Homepage:

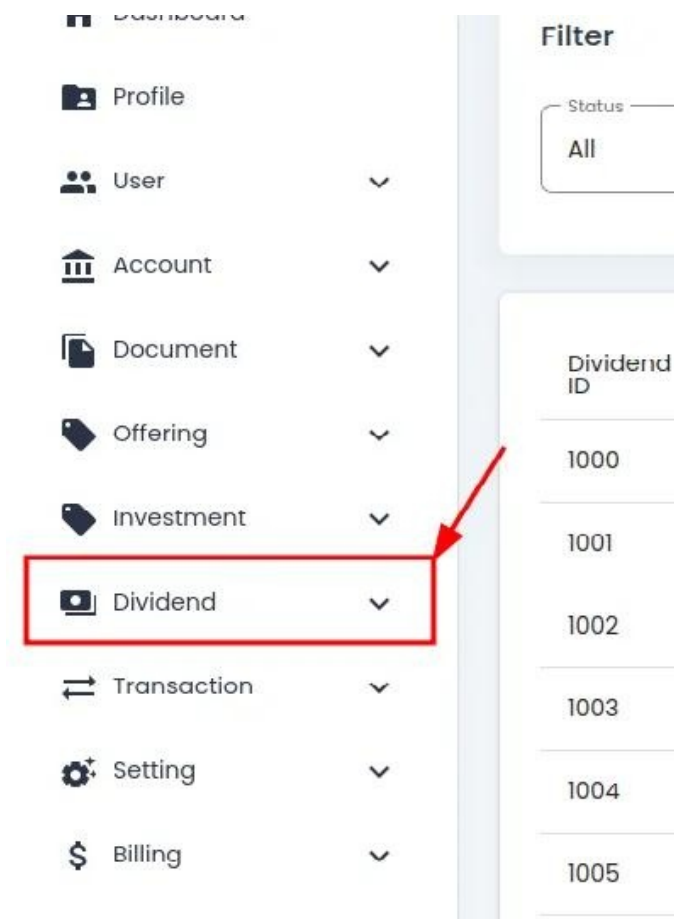
1. Locate the primary sidenav to the left of the page.

#### Don't see the sidenav?

See [How to Toggle Primary Sidebar](#) for more information.

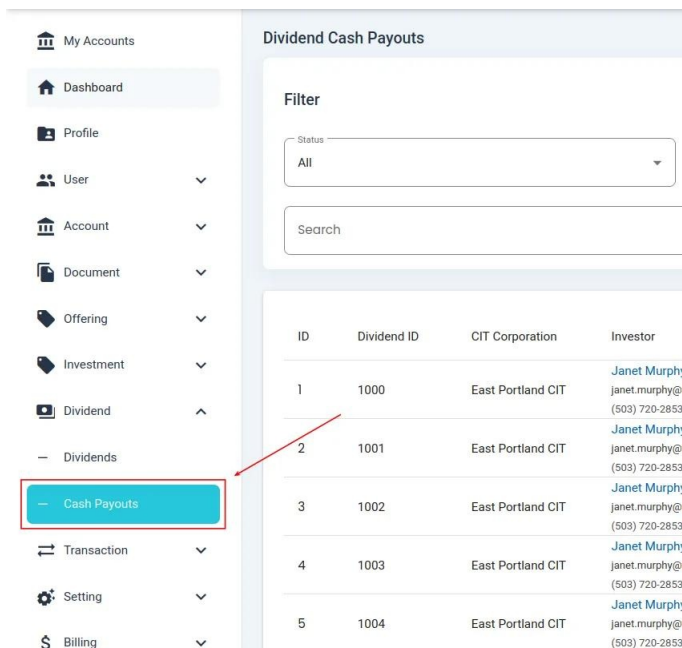
2. Select the dropdown for the **Dividend** category.





Dividend Category, Primary Sidenav, Dropdown Location

3. Select **Cash Payouts** from the dropdown.



Cash Payouts Homepage

## Cash Payouts List Table

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

Dividend Cash Payouts

Filter

Status: All Sponsor Organization: All

Search

ID	Dividend ID	CIT Corporation ↑	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Cash Payouts List Table

## 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
- **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.

Dividend Cash Payouts

Filter

Status: All Sponsor Organization: All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tollinvestoit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Dividend, Cash Payouts, Investor Column

2. Click on the **Investor** you wish to view details for.

Dividend Cash Payouts

**Filter**

Status: All | Sponsor Organization: All

Search

ID	Dividend ID ↑	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

Dividend, Cash Payouts, Investor Select Example

✔ 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**.

## Using Cash Payouts Filters

### To Filter Cash Payouts:

1. Locate the filter section above the table.

Dividend Cash Payouts

**Filter**

Status: All | Sponsor Organization: All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed

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.

## Dividend Cash Payouts

### Filter

Status

All

Sponsor Organization

All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH

Cash Payouts, Status Dropdown, Location

2. **SELECT** the **Status** you want to filter by from the dropdown.

## Dividend Cash Payouts

### Filter

Status

All

All

Pending

Paid (Clearing Pending)

Voided & Replacement

Complete

Sponsor Organization

All

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH

Cash Payouts, Status Dropdown, Expanded

## How to: Filter by Sponsor Organization

1. Find and **CLICK** on the **Sponsor Organization** dropdown.

Dividend Cash Payouts

Filter

Status: All

Sponsor Organization: All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH
5	1004	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 02, 2022	\$78.00	ACH	ACH

Cash Payouts, Sponsor Organization Dropdown, Location

2. **SELECT** the **Sponsor Organization** you want to filter by from the dropdown.

Dividend Cash Payouts

Filter

Status: All

Sponsor Organization: All

Search

Community Investment Trust

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed

Cash Payouts, Sponsor Organization Dropdown, Expanded

## How to: Search for Cash Payout Information

1. Find and **CLICK** on the **Search** field.

Dividend Cash Payouts

Filter

Status: All

Sponsor Organization: All

Search

ID	Dividend ID	CIT Corporation	Investor	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com	May 11, 2021	\$56.00	ACH	ACH	Completed

2. **TYPE** in the **Name of the Investor** you want to see **Cash Payouts** for.

**Dividend Cash Payouts**

**Filter**

Status:  Sponsor Organization:

ID	Dividend ID	CIT Corporation	Investor ↑	Payable	Amount	Payment Type	Payment Reference	Status
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH	Completed
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	April 10, 2019	\$85.00	ACH	ACH	Completed
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 06, 2020	\$140.00	ACH	ACH	Completed
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH	Completed
5	1004	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 02, 2022	\$78.00	ACH	ACH	Completed
6	1005	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 19, 2023	\$80.00	ACH	ACH	Completed
7	1006	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	May 17, 2024	\$25.00	ACH	ACH	Completed
12	1007	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	February 28, 2025	\$0.84	ACH	ACH	Completed

Items per page:  1 - 8 of 8

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.

**Investments**

**Filter**

Status:  CIT Corporation:  Search:

ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
1113	East Portland CIT	<b>New UserInvest</b> newuserinvest@tol.com (503) 720-2853	2025	March 15, 2025	\$50.00	Open
1114	East Portland CIT	[Redacted]	2025	March 15, 2025	\$50.00	Open
1115	East Portland CIT	Test Account TestEmail@gmail.com (859) 992-1866	2025	March 01, 2025	\$10.00	Open
1116	East Portland CIT	Tom Cruise tomcruise@tol.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open
1112	East Portland CIT	[Redacted]	2025	March 01, 2025	\$50.00	Open
1103	East Portland CIT	[Redacted]	2025	February 15, 2025	\$50.00	Open
1104	East Portland CIT	[Redacted]	2025	February 15, 2025	\$50.00	Open
1089	East Portland CIT	[Redacted]	2024	July 15, 2024	\$10.00	Open (Payment Processing)
1022	East Portland CIT	[Redacted]	2024	July 15, 2024	\$100.00	Open (Payment Processing)
1053	East Portland CIT	[Redacted]	2024	July 15, 2024	\$50.00	Open (Payment Processing)

Items per page:  1 - 10 of 93

Cash Payouts, Investor Click

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


See [View Investor Details](#) for more information.

## Transaction

The following  can be found in the Transaction category:

- [Directives](#)
- [Complete Transactions](#)

## Directives

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

[Directives Homepage Location](#)

[Directives List Table Overview](#)

[Filtering the Directives List](#)



## [Directives Homepage Location](#)

### To Find the Directives List Homepage:

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

#### Don't see the sidebar?

See [How to Toggle Primary Sidebar](#) for more information.

2. Select the dropdown for the  **Transaction** category.
3. Select  from the dropdown.

COMMUNITY INVESTMENT TRUST

My Accounts

Dashboard

Profile

User

Account

Document

Offering

Investment

Dividend

Transaction

**Directives**

Complete Transactions

Setting

### Directives

Filter

Status: All

Search Transaction ID

Transaction ID	CIT Corporation	Effect Date
1014	East Portland CIT	January 2025
1013	East Portland CIT	January 2025
1012	East Portland CIT	January 2025
1010	East Portland CIT	January 2025
1011	East Portland CIT	January 2025

Directives Homepage

## 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)



Directives

Filter

Status: All | Sponsor Organization: All

Search Transaction ID

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/Cancelled	🔍
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Cancelled	🔍
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Cancelled	🔍
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	🔍

Items per page: 10 | 1 - 5 of 5

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:

Directives

**Filter**

Status: All      Sponsor Organization: All

Search Transaction ID

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	

Items per page: 10      1 - 5 of 5

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.

Directives

**Filter**

Status: All

Sponsor Organization: All

Search Transaction ID

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	

Items per page: 10      1 - 5 of 5

Status dropdown in the Directives filter section

2. Select from available status options:

Directives

**Filter**

Status

All

All

Pending

Complete

Rejected/Canceled

Sponsor Organization

All

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0

Status dropdown expanded showing All, Pending, Complete, and Rejected/Canceled options

### Sponsor Organization Filter Dropdown

1. Find and Click on the **Sponsor Organization** dropdown to filter by organization.

Directives

**Filter**

Status

All

Sponsor Organization

All

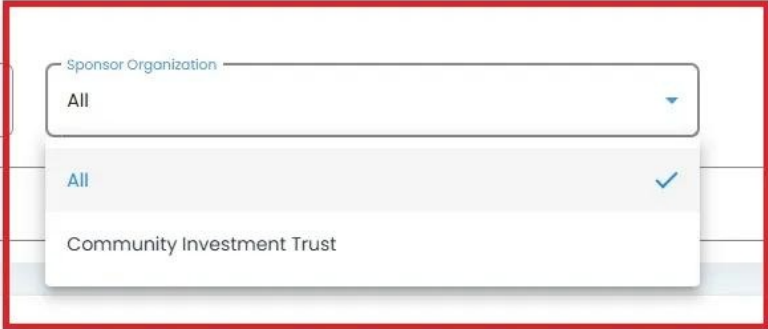
Search Transaction ID

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	

Items per page: 10 1 - 5 of 5

Sponsor Organization dropdown in the filter section

2. Select from available organization options:



	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status
T	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending
T	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected
T	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected
T	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected
T	January 29,	\$0.00	0.0	0	01/29/2025	John Service	Complete

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:

Directives

Filter

Status: All | Sponsor Organization: All

Search Transaction ID

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	👁

Items per page: 10 | 1 - 5 of 5

Search Bar for Transaction ID

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

Directives

**Filter**

Status: All | Sponsor Organization: All

Search: 1013

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	

Items per page: 10 | 1 - 1 of 1

Search Bar for Transaction ID with search results

**How to Use 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.

Directives

**Filter**

Status: All | Sponsor Organization: All

Search Transaction ID

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			
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	

Items per page: 10 | 1 - 5 of 5

Eye icon in the Action column for viewing directive details

2. Click the eye icon to open the Directive Details screen.

Directives

Filter

Status: All

Sponsor Organization: All

Search Transaction ID

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	Info
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Cancelled	Info
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Cancelled	Info
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Cancelled	Info
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	Info

Items per page: 10 1 - 5 of 5

Directive Details Screen showing comprehensive information about Transaction ID 1014 including Info and Investments sections

## 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
- 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

- [Complete Transactions Homepage Location](#)
- [Complete Transactions List Table](#)
- [Columns: Complete Transactions List Table](#)
- [Using Complete Transactions Filters](#)



## [Complete Transactions Homepage Location](#)

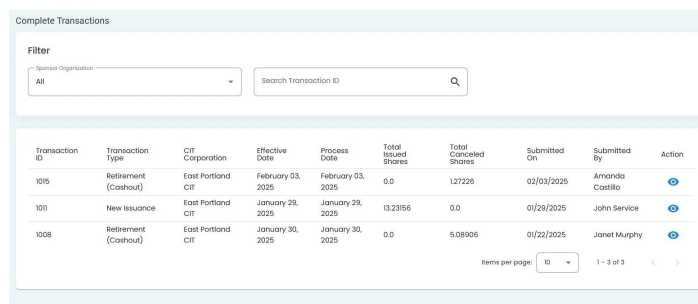
### To Find the Complete Transactions List Homepage:

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.






Complete Transactions

Filter

Sponsor Organization: All

Search Transaction ID

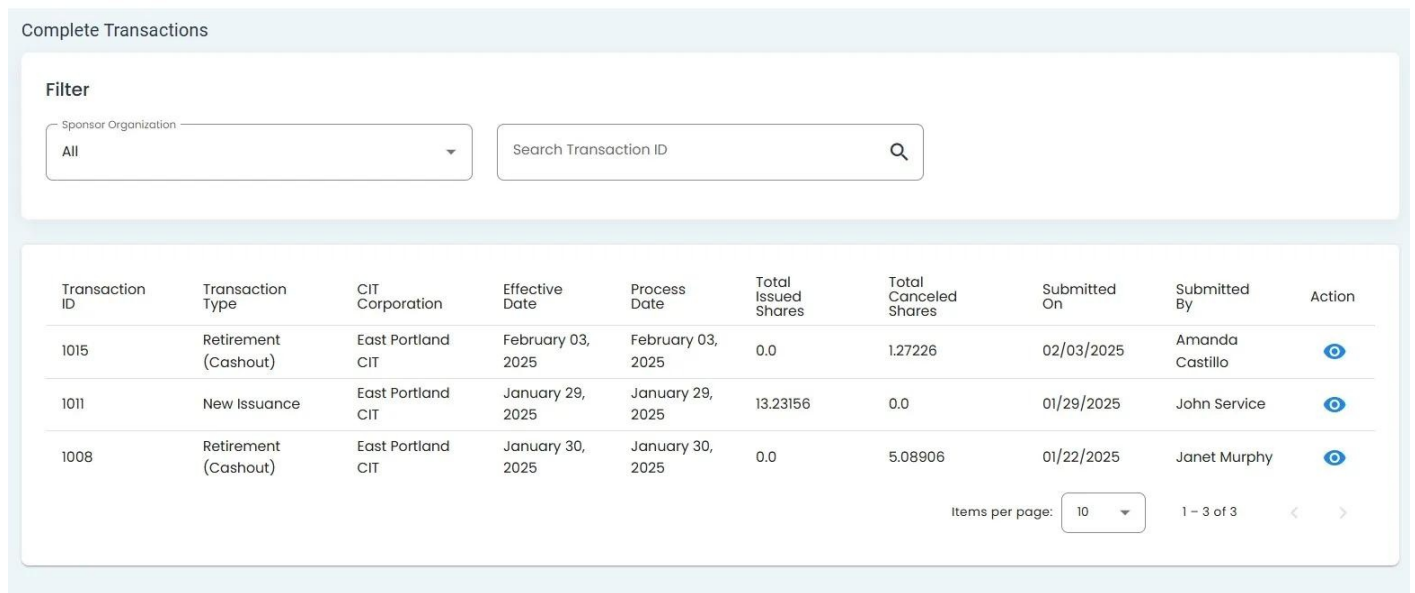
Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page: 10 1 - 3 of 3

Complete Transactions Homepage

## [Complete Transactions List Table](#)

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






Complete Transactions

Filter

Sponsor Organization: All

Search Transaction ID

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page: 10 1 - 3 of 3

## 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
- **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.

Complete Transactions

**Filter**

Sponsor Organization: All

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page: 10  < >

Complete Transactions Table Filter Section Highlighted

2. Click on the Sponsor Organization dropdown to filter by organization.



**Filter**

Sponsor Organization: All

Search Transaction ID

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page: 10 0 of 0

Complete Transactions Status Dropdown Location

3. Select the Sponsor Organization you wish to see the transactions for.

**Complete Transactions**

**Filter**

Sponsor Organization: All

Search Transaction ID

All

Community Investment Trust

ID	Type	Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906

Items per pag

Sponsor Organization, Dropdown Expanded

4. Select the **Search Transaction ID** field.

John Doe (John s)

Filter

Sponsor Organization: All

Search Transaction ID

Transaction ID	Transaction Type	CIT Corporation	Effective Date	Process Date	Total Issued Shares	Total Canceled Shares	Submitted On	Submitted By	Action
1015	Retirement (Cashout)	East Portland CIT	February 03, 2025	February 03, 2025	0.0	1.27226	02/03/2025	Amanda Castillo	
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	

Items per page: 10 0 of 0

Search Transaction ID Field Location

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

## Settings

This following **Section(s)** are included in the **Settings** category:

- Receive Notifications

## Billing

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

- [Invoices](#)
- [Payments](#)
- [Statement](#)
- [Payment Management](#)

## Invoices

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

### Table of Contents

- [Invoices Homepage](#)
- [Columns: Invoices List Table](#)
- [How to Download Invoices in PDF](#)
- [How to Add an Invoice](#)
- [How to Add New Line Items](#)

## Hover for Page Preview

Hover over the links for a page preview.

The screenshot shows a table with columns: Contact Name, Contact Email, Number of Visits, Last Logged In, Status, and Action. The table lists staff members like Anass Zolgami, Carl Padeyn, John Doe, John Service, John Vo, Mohd Shazad, and Ponkaj CIT. A tooltip is visible over the 'Staff List' link, containing the text 'Staff Homepage #', a link to 'Need help finding the Staff Homepage?', and a 'Hover for Page Preview' button with a 'Click to show' dropdown.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 12:48 PM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Carl Padeyn	cpadeyn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
John Doe	dievsey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
John Service	ck@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:19 AM	Active	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Ponkaj CIT	ponkaj.posh@techaheadcorp.com	0		Action on Pending	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

## Invoices Homepage

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

The screenshot shows the 'Invoices List' table with a search bar and a 'Company Type' dropdown. The table has columns: Invoice No., Bill To, Type, Date, Amount, Paid, Balance, and Action. The data includes invoices for various companies like East Portland CIT, Shahzad, West Portland CIT, PL, Replicator Community, PT, RK Entity, and TOL Community.

Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	<a href="#">View</a>
1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$103.87	\$396.13	<a href="#">View</a>
1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	<a href="#">View</a>
1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	<a href="#">View</a>
1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	<a href="#">View</a>
1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	<a href="#">View</a>
1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	<a href="#">View</a>
1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	<a href="#">View</a>
1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	<a href="#">View</a>
1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	<a href="#">View</a>

Billing, Invoices, Homepage

## Columns: Invoices List Table

Invoices List

Company Type  Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount ↑	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page:  1 - 10 of 19

[Download Invoices in PDF](#)

## Billing, Invoices, Columns Explained

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

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

Invoices List

Company Type

Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page:  1 - 10 of 19

[Download Invoices in PDF](#)

## Billing, Invoices, Selecting Invoices

2. Click the [Download invoices in PDF](#) button:

Invoices List

Company Type

Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input checked="" type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page:  1 - 10 of 19

[Download Invoices in PDF](#)

## Billing, Invoices, Download PDF Button

## How to Add an Invoice

To add a new invoice:

1. Click the [Add New Invoice](#) button (plus sign):

Invoices List

Company Type  Search by Invoice No. or Bill to

	Invoice No.	Bill To	Type	Date	Amount ↑	Paid	Balance	Action
<input type="checkbox"/>	1002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
<input type="checkbox"/>	1003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
<input type="checkbox"/>	1004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
<input type="checkbox"/>	1006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
<input type="checkbox"/>	1007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
<input type="checkbox"/>	1008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
<input type="checkbox"/>	1009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
<input type="checkbox"/>	1010	Replicator Community	Service	02/12/2025	\$565.00	\$14.33	\$550.67	
<input type="checkbox"/>	1011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
<input type="checkbox"/>	1012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Items per page:  1 - 10 of 19

[Download Invoices in PDF](#)

### Billing, Invoices, Add New Invoice Button

#### 2. Fill out the invoice form:

Add Invoice

Company Type\*  Date\*

Invoice Type\*  Note to Biller\*

Internal Note\*

**Line Items** +

	Item Type*	Description*	Amount*
1	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Total amount \$0.00**

[Save Changes](#)

### Billing, Invoices, Add Invoice Form

#### Note

All fields are required for creating a new invoice.

Add Invoice

Company Type\*  Date\*

Invoice Type\*  Note to Biller\*

Internal Note\*

**Line Items** +

1	Item Type*	Description*	Amount*
	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Total amount \$0.00**

[Save Changes](#)

Billing, Invoices, All Fields Required

3. Complete all required information (example):

Add Invoice

Company Type\*  Company Accounts\*

Date\*  Invoice Type\*

Note to Biller\*  Internal Note\*

**Line Items** +

1	Item Type*	Description*	Amount*
	<input type="text" value="Post"/>	<input type="text" value="Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025"/>	<input type="text" value="\$500"/>

**Total amount \$500.00**

[Save Changes](#)

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:

Add Invoice

Company Type\*  Company Accounts\*

Date\*  Invoice Type\*

Note to Biller\*  Internal Note\*

**Line Items** +

1	Item Type*	Description*	Amount*
	<input type="text" value="Post"/>	<input type="text" value="Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025"/>	<input type="text" value="\$500"/>

**Total amount \$500.00**

[Save Changes](#)

Billing, Invoices, Add Line Item Button

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

**Add Invoice**

Company Type\* Sponsor Organizations  
Company Accounts\* Community Investment Trust  
Date\* 3/13/2025  
Invoice Type\* Service  
Note to Biller\* Sponsorship fee for the annual community workshop.  
Internal Note\* Please direct any questions about this invoice to accounts@communitytrust.org. Payment is due within 30 days.

**Line Items**

Item Type*	Description*	Amount*
1 Other	Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	\$500
2 Service	Fee for renting a promotional booth at the Spring Community Expo.	\$750

Total amount \$1,250.00

Save Changes

Billing, Invoices, Second Line Item Added

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

**Add Invoice**

Company Type\* Sponsor Organizations  
Company Accounts\* Community Investment Trust  
Date\* 3/13/2025  
Invoice Type\* Service  
Note to Biller\* Sponsorship fee for the annual community workshop.  
Internal Note\* Please direct any questions about this invoice to accounts@communitytrust.org. Payment is due within 30 days.

**Line Items**

Item Type*	Description*	Amount*
1 Other	Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	\$500
2 Service	Fee for renting a promotional booth at the Spring Community Expo.	\$750

Total amount \$1,250.00

Save Changes

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](#)

[Layout: Payments Homepage](#)

[Filtering Payments](#)

- [Step 1: Locate the Filter Button](#)
- [Step 2: Select Filter Criteria](#)

[Searching Payments](#)

- [Step 1: Locate the Search Bar](#)
- [Step 2: Enter Search Terms](#)

[Additional Features](#)

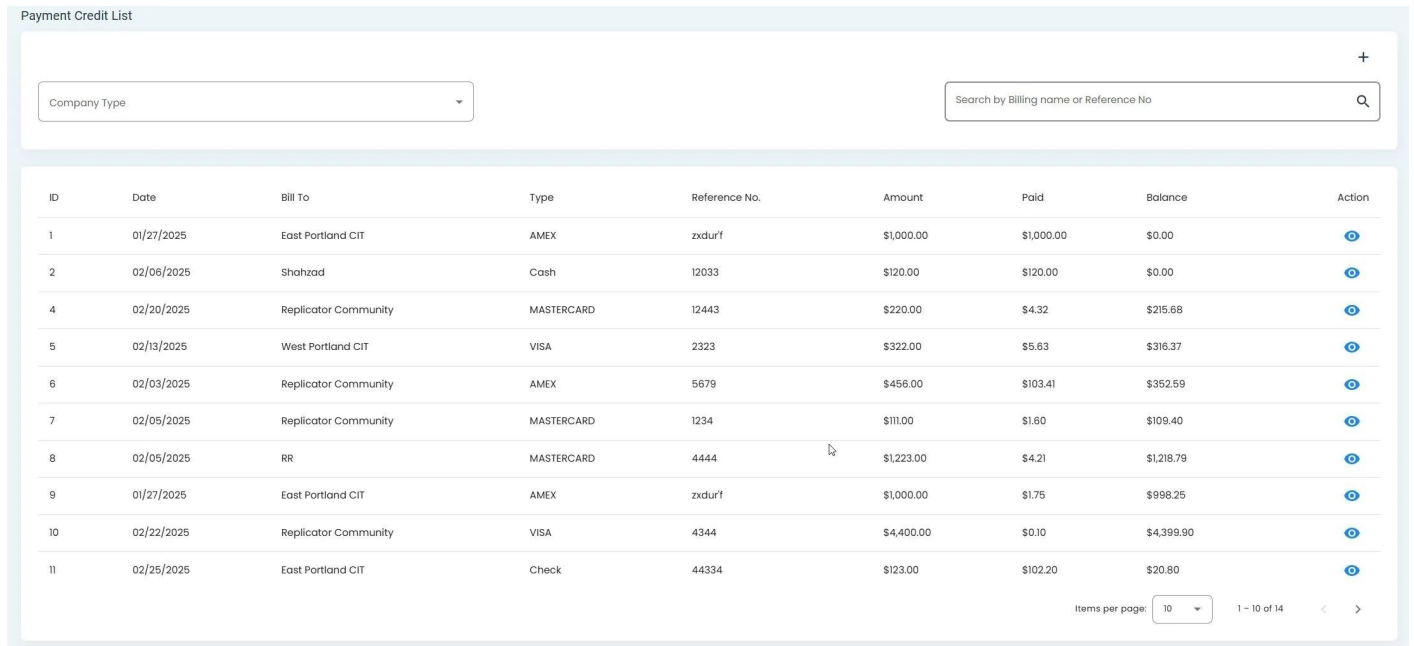


## Features: Payments

- 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.



Payment Credit List

Company Type  Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdurf	\$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	zxdurf	\$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	

Items per page:  1 - 10 of 14

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.

Payment Credit List

Company Type

Search by Billing name or Reference No

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	\$5.83	\$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	

Items per page: 10 1 - 10 of 14

Filter button location in the Payments table

## Step 2: Select Filter Criteria

Click the filter button to expand the available filtering options.

Payment Credit List

Company Type

All

Sponsor Organizations

CIT Corporations

Type	Reference No.	Amount
AMEX	zxdur'f	\$1,000.00
Cash	12033	\$120.00
MASTERCARD	12443	\$220.00
VISA	2323	\$322.00
AMEX	5679	\$456.00
MASTERCARD	1234	\$111.00

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.

Payment Credit List

Company Type

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxduf	\$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	zxduf	\$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	

Items per page: 10 1 - 10 of 14

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.

Payment Credit List

Company Type: All

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxduf	\$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	zxduf	\$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	

Items per page: 10 1 - 10 of 14

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](#)

#### [Steps: Accessing Payment Details](#)

- [Step 1: Locate the View Details Button](#)
- [Step 2: View Payment Details Screen](#)

#### [Understanding the Payment Details](#)

- [Quick Information Section](#)
- [Detailed Columns](#)

#### [Summary](#)

## 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.

Payment Credit List

Company Type: All

Search by Billing name or Reference No

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxduzf	\$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	zxduzf	\$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	

Items per page: 10 1 - 10 of 14

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.

Payment Credit Details

Date*	1/27/2025	Payment Type*	AMEX
Reference No.*	zxclurf	Amount*	\$1,000
Paid*	\$1,000	Balance*	\$0
Note*	Credited		

Invoice No.	Type	Date	Amount	Paid	Balance	
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$159	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13

Items per page: 10 1 - 2 of 2

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.

Payment Credit Details

Date*	1/27/2025	Payment Type*	AMEX
Reference No.*	zxclurf	Amount*	\$1,000
Paid*	\$1,000	Balance*	\$0
Note*	Credited		

Invoice No.	Type	Date	Amount	Paid	Balance	
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$159	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13

Items per page: 10 1 - 2 of 2

Quick information section highlighted in the Payment Details screen

### Detailed Columns

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

Payment Credit Details

Date\* 1/27/2025

Payment Type\* AMEX

Reference No.\* zxdur1

Amount\* \$1,000

Paid\* \$1,000

Balance\* \$0

Note\* Credited

Invoice No.	Type	Date	Amount	Paid	Balance
1002	Setup Fee	10/04/2024	\$1,500.00	\$159	\$1,498.41
1003	Setup Fee	01/29/2025	\$1,500.00	\$1103.87	\$396.13

Items per page: 10 1 - 2 of 2

Columns of information in the Payment Details screen

## Summary

The Payment Details screen allows you to:

1. Access comprehensive information about individual payment records
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](#)

#### [Steps: Adding Payment Credits](#)

- [Step 1: Locate the Add Payment Credit Button](#)
- [Step 2: Access the Add Payment Credit Form](#)
- [Step 3: Select Company Type](#)
- [Step 4: Select Company Account](#)
- [Step 5: Select Payment Type](#)
- [Step 6: Fill Out Fields and Save](#)

#### [Summary](#)

## Overview: Payment Credits

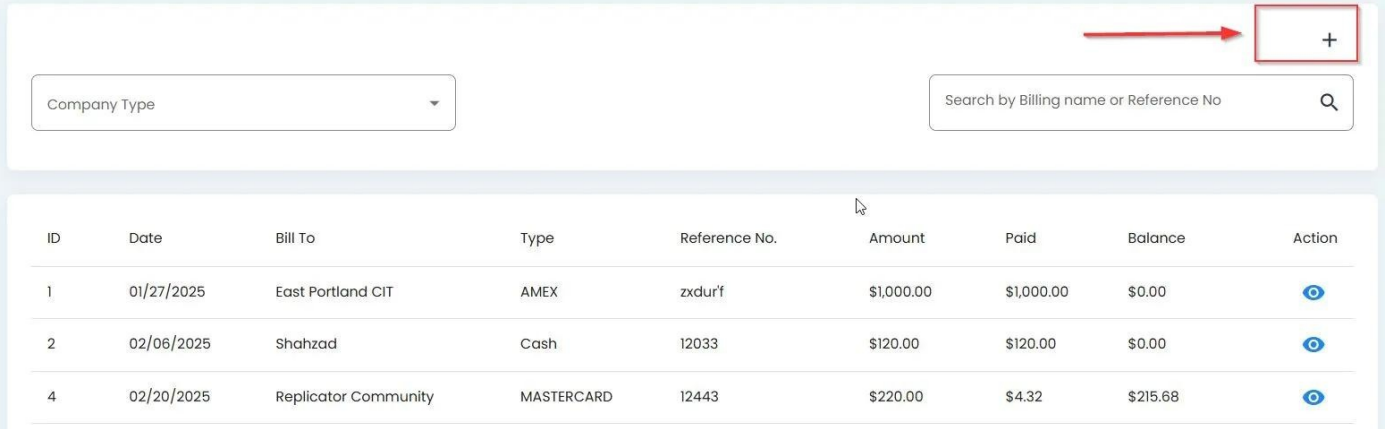
Payment credits allow you to add funds to company accounts in the system. This feature is essential for maintaining payment balances and facilitating transactions within the application.

### [Steps: Adding Payment Credits](#)

#### [Step 1: Locate the Add Payment Credit Button](#)

Find the “Add Payment Credit” button in the Payments interface.

## Payment Credit List



Company Type ▼ Search by Billing name or Reference No 🔍

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxduf	\$1,000.00	\$1,000.00	\$0.00	<span>👁</span>
2	02/06/2025	Shahzad	Cash	12033	\$120.00	\$120.00	\$0.00	<span>👁</span>
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00	\$4.32	\$215.68	<span>👁</span>

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.

### Add Payment Credit

Company Type\* ▼ Payment Type\* ▼

Date\* 📅 Reference\*

Amount\* Note\* 📝

Save Changes

The Add Payment Credit form

### Note

All fields in the Add Payment Credit form are required.

### Add Payment Credit

Company Type\* ▼ Payment Type\* ▼

Date\* 📅 Reference\*

Amount\* Note\* 📝

Save Changes

### Step 3: Select Company Type

Choose the appropriate company type from the dropdown menu.

The screenshot shows the 'Add Payment Credit' form. The 'Company Type\*' dropdown menu is open, showing three options: 'Sponsor Organizations' (selected with a blue checkmark), 'Sponsor Organizations' (highlighted in grey), and 'CIT Corporations'. A red box highlights the dropdown menu and the 'Reference\*' and 'Note\*' fields. A red arrow points to the 'Reference\*' field. To the right of the dropdown menu are three input fields: 'Company Accounts\*', 'Date\*', and 'Amount\*'. The 'Note\*' field has a small icon in the bottom right corner.

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.

The screenshot shows the 'Add Payment Credit' form. The 'Company Accounts\*' dropdown menu is open, showing a list of options: 'Community Investment Trust' (selected with a blue checkmark), 'Replicator Community', 'PT', 'RR', 'KK', and 'NN'. A red box highlights the dropdown menu. A red arrow points to the 'Company Accounts\*' dropdown menu. To the left of the dropdown menu are four input fields: 'Company Type\*', 'Date\*', 'Amount\*', and 'Note\*'. The 'Note\*' field has a small icon in the bottom right corner. A 'Save Changes' button is visible in the bottom right corner of the form.

Selecting the company account in the Add Payment Credit form

### Step 5: Select Payment Type

Choose the appropriate payment type from the available options.



The screenshot shows the 'Add Payment Credit' form. The 'Company Type' is set to 'Sponsor Organizations' and 'Company Accounts' is 'Community Investment Trust'. The 'Payment Type' dropdown menu is open, showing options: Check, VISA, AMEX, MASTERCARD, DISCOVER, and Cash. A red arrow points to the 'DISCOVER' option. Other fields include 'Date\*' and 'Amount\*'. A 'Save Changes' button is visible in the bottom right corner.

Selecting the payment type in the Add Payment Credit form

### [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.

The screenshot shows the 'Add Payment Credit' form with all fields filled out. The 'Company Type' is 'Sponsor Organizations' and 'Company Accounts' is 'Community Investment Trust'. The 'Payment Type' is 'VISA', 'Date' is '3/19/2025', 'Reference' is 'AMEX Transaction #ZX1234', 'Amount' is '\$1,000', and 'Note' is 'Partial payment toward Setup Fee invoice #1002'. A red arrow points to the 'Save Changes' button in the bottom right corner.

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.

# Statement

## Contents

[Statement](#)

## Payment Management

The [Payment Management](#) section provides tools for managing payments and invoices within the system.

[Features: Payment Management](#)

[Layout: Payment Management Homepage](#)

- [Table Names](#)
- [Table Sections](#)

[Columns: Payment Management Tables](#)

[Search Functionality](#)

[Filtering Records](#)

## Features: Payment Management

- View and manage payments
- Track and process invoices
- Filter records by various criteria
- Search for specific payment and invoice entries

## Layout: Payment Management Homepage

The Payment Management homepage has a unique layout with two separate tables on one page:

- [Payments Table](#) - Shows all payment records
- [Invoices Table](#) - Shows all invoice records

These tables function independently with their own search and filter features, but selecting an invoice (checking the checkbox) affects the Payments section's displayed columns.

Payment Management

Company Type

**Payments**

Search by Reference No.

Date	Type	Reference No.	Amount	Balance	Actio
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

**Invoices**

Search by Invoice No.

	Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/>	1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/>	1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/>	1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/>	1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/>	1009	Service	02/03/2025	\$156.00	\$153.69

Payment Management Homepage with two separate tables

## Table Names

Each section of the page has a clearly labeled table name at the top.

Payment Management

Company Type

**Payments**

Search by Reference No.

Date	Type	Reference No.	Amount	Balance	Actio
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

**Invoices**

Search by Invoice No.

	Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/>	1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/>	1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/>	1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/>	1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/>	1009	Service	02/03/2025	\$156.00	\$153.69

Table names displayed at the top of each section

## Table Sections

The page is divided into two distinct table sections, each with its own functionality.

Company Type

**Payments**

Search by Reference No.

Date	Type	Reference No.	Amount	Balance	Actio
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

**Invoices**

Search by Invoice No.

	Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/>	1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/>	1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/>	1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/>	1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/>	1009	Service	02/03/2025	\$156.00	\$153.69

Payment Management page divided into two separate table sections

## Columns: Payment Management Tables

Each table has specific columns with relevant information about payments and invoices.

Company Type

**Payments**

Search by Reference No.

Date	Type	Reference No.	Amount	Balance	Actio
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

**Invoices**

Search by Invoice No.

	Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/>	1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/>	1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/>	1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/>	1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/>	1009	Service	02/03/2025	\$156.00	\$153.69

Columns displayed in the Payment and Invoice tables

## Search Functionality

Each table has its own search bar for finding specific records.

Payment Management

Company Type

**Payments**

Search by Reference No 🔍

Date	Type	Reference No.	Amount	Balance	Actio
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

**Invoices**

Search by Invoice No. 🔍

Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/> 1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/> 1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/> 1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/> 1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/> 1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/> 1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/> 1009	Service	02/03/2025	\$156.00	\$153.69

Search bar location for each table

## Filtering Records

Both tables offer filtering capabilities to narrow down displayed records.

Payment Management

Company Type

**Payments**

Search by Reference No 🔍

Date	Type	Reference No.	Amount	Balance	Actio
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

**Invoices**

Search by Invoice No. 🔍

Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/> 1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/> 1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/> 1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/> 1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/> 1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/> 1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/> 1009	Service	02/03/2025	\$156.00	\$153.69

Filter options available for Payment Management tables

## Matching Payments to Invoices

The **Matching Payments to Invoices** section demonstrates how to match payments with specific invoices in the system.

## Overview: Matching Payments to Invoices

### Steps: Matching Payments to Invoices

- [Step 1: Locate the Invoice Checkbox](#)
- [Step 2: Check an Invoice](#)
- [Step 3: View Result in Payments Table](#)
- [Step 4: Click the Payment Action Button](#)
- [Step 5: View Payment Window](#)
- [Step 6: Locate Apply Payment Field](#)
- [Step 7: Enter Payment Amount](#)
- [Step 8: Save the Payment](#)

### Result: Payment Confirmation

### Summary

## Overview: Matching Payments to Invoices

The Payment Management system allows you to associate payments with specific invoices by selecting invoices and applying payments to them. This process helps track which payments correspond to which invoices in the system.

### Steps: Matching Payments to Invoices

#### Step 1: Locate the Invoice Checkbox

First, locate the checkbox column in the [Invoices Table](#).

Payment Management

Company Type

#### Payments

Search by Reference No.

Date	Type	Reference No.	Amount	Balance	Action
01/27/2025	AMEX	zxduf	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxduf	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	

#### Invoices

Search by Invoice No.

<input type="checkbox"/>	Invoice No.	Type	Date	Amount	Balance
<input type="checkbox"/>	1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
<input type="checkbox"/>	1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13
<input type="checkbox"/>	1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57
<input type="checkbox"/>	1006	Fee	02/14/2025	\$577.00	\$570.87
<input type="checkbox"/>	1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99
<input type="checkbox"/>	1008	Fee	02/19/2025	\$3,566.00	\$3,459.45
<input type="checkbox"/>	1009	Service	02/03/2025	\$156.00	\$153.69

Invoice table with checkbox column highlighted

#### Step 2: Check an Invoice

Select the invoice you want to make a payment to by checking the checkbox next to it.

Payments						Invoices			
Date	Type	Reference No.	Amount	Balance	Actic	Invoice No.	Type	Date	
01/27/2025	AMEX	zxduf	\$1,000.00	\$0.00		<input checked="" type="checkbox"/>	1002	Setup Fee	10/04/2024
01/27/2025	AMEX	zxduf	\$1,000.00	\$998.25	\$	<input type="checkbox"/>	1003	Setup Fee	01/29/2025
02/03/2025	AMEX	5679	\$456.00	\$352.59	\$		1004	Setup Fee	02/04/2025
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	\$		1006	Fee	02/14/2025
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	\$		1007	Setup Fee	02/05/2025
02/06/2025	Cash	12033	\$120.00	\$0.00			1008	Fee	02/19/2025
02/13/2025	VISA	2323	\$322.00	\$316.37	\$		1009	Service	02/03/2025
02/20/2025	MASTERCARD	12443	\$220.00	\$215.68	\$		1010	Service	02/12/2025
02/22/2025	VISA	4344	\$4,400.00	\$4,399.90	\$		1011	Fee	02/06/2025

Selecting an invoice by checking the checkbox

### Step 3: View Result in Payments Table






After selecting an invoice, notice how the Payments table updates to show a new column related to the selected invoice.

Payments						Invoices			
Date	Type	Reference No.	Amount	Balance	Actic	Invoice No.	Type	Date	
01/27/2025	AMEX	zxduf	\$1,000.00	\$0.00		<input checked="" type="checkbox"/>	1002	Setup Fee	10/04/2024
01/27/2025	AMEX	zxduf	\$1,000.00	\$998.25	\$	<input type="checkbox"/>	1003	Setup Fee	01/29/2025
02/03/2025	AMEX	5679	\$456.00	\$352.59	\$		1004	Setup Fee	02/04/2025
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	\$		1006	Fee	02/14/2025
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	\$		1007	Setup Fee	02/05/2025
02/06/2025	Cash	12033	\$120.00	\$0.00			1008	Fee	02/19/2025
02/13/2025	VISA	2323	\$322.00	\$316.37	\$		1009	Service	02/03/2025
02/20/2025	MASTERCARD	12443	\$220.00	\$215.68	\$		1010	Service	02/12/2025
02/22/2025	VISA	4344	\$4,400.00	\$4,399.90	\$		1011	Fee	02/06/2025

The Payments table updates to show information related to the selected invoice

### Step 4: Click the Payment Action Button

Locate and click the payment icon (money symbol) next to the invoice you want to make a payment to.

Payments						Invoices
Search by Reference No <input type="text"/>						
Date	Type	Reference No.	Amount	Balance	Action	
01/27/2025	AMEX	zxdurf	\$1,000.00	\$0.00		<input checked="" type="checkbox"/>
01/27/2025	AMEX	zxdurf	\$1,000.00	\$998.25		<input type="checkbox"/>
02/03/2025	AMEX	5679	\$456.00	\$352.59		
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40		
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79		
02/06/2025	Cash	12033	\$120.00	\$0.00		
02/06/2025	AMEX	5679	\$456.00	\$352.59		

Click the payment action button to initiate payment

### [Step 5: View Payment Window](#)

A payment popup window will appear with available payment information.



### Apply Payment to Specific Invoice ✕

**Invoices**

Invoice No.	Type	Date	Amount	Balance
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
			<b>Total</b>	<b>\$1,498.41</b>

**Payment Credit**

<b>Date</b> 01/27/2025 @ 12:00 AM	<b>Type</b> AMEX
<b>Reference</b> zxduf	<b>Amount</b> \$1,000.00
<b>Balance</b> \$998.25	

Apply Payment\*

Cancel Apply

VISA 4344 \$4,400.00 \$4,399.90 1011 Fee

Payment popup window with available information

#### [Step 6: Locate Apply Payment Field](#)

Find the Apply Payment field in the payment window.

## Apply Payment to Specific Invoice



### Invoices

Invoice No.	Type	Date	Amount	Balance
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
			<b>Total</b>	<b>\$1,498.41</b>

### Payment Credit

**Date**

01/27/2025 @ 12:00 AM

**Reference**

zxdur'f

**Balance**

\$998.25

**Type**

AMEX

**Amount**

\$1,000.00

Locate the Apply Payment field in the window

### [Step 7: Enter Payment Amount](#)

Enter the desired payment amount in the Apply Payment field.

## Apply Payment to Specific Invoice



### Invoices

Invoice No.	Type	Date	Amount	Balance
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
			<b>Total</b>	<b>\$1,498.41</b>

### Payment Credit

**Date** 

01/27/2025 @ 12:00 AM

**Reference**

zxdur'f

**Balance**

\$998.25

**Type**

AMEX

**Amount**

\$1,000.00

Apply Payment\*

\$998.25



Cancel

Apply

Enter the amount you wish to apply to this invoice

### [Step 8: Save the Payment](#)

Click the Save button to apply the payment to the selected invoice.

## Apply Payment to Specific Invoice



### Invoices

Invoice No.	Type	Date	Amount	Balance
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41
			<b>Total</b>	<b>\$1,498.41</b>

### Payment Credit

**Date**

01/27/2025 @ 12:00 AM

**Reference**

zxdur'f

**Balance**

\$998.25

**Type**

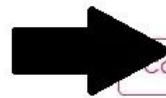
AMEX

**Amount**

\$1,000.00

Apply Payment\*

\$998.25



Cancel

Apply

Click the Save button to complete the payment

### [Result: Payment Confirmation](#)

After successfully applying a payment, a confirmation message will appear.

### Payments

Search by Reference No Q

Date	Type	Reference No.	Amount	Balance	Action
01/27/2025	AMEX	zxduf	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxduf	\$1,000.00	\$0.00	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00	\$0.00	
02/13/2025	VISA	2323	\$322.00	\$316.37	
02/20/2025	MASTERCARD	12443	\$220.00	\$215.68	
02/22/2025	VISA	4344	\$4,400.00	\$4,399.90	
02/25/2025	Check	44334			

### Invoices

	Invoice No.	Type
<input type="checkbox"/>	1002	Set Fee
<input type="checkbox"/>	1003	Set Fee
<input type="checkbox"/>	1004	Set Fee
<input type="checkbox"/>	1006	Fee
<input type="checkbox"/>	1007	Set Fee
<input type="checkbox"/>	1008	Fee
<input type="checkbox"/>	1009	Ser
<input type="checkbox"/>	1010	Ser
<input type="checkbox"/>	1011	Fee
<input type="checkbox"/>	1012	Ser

✓ Saved! ✕

Success message confirming the payment has been applied

## Summary

The process of matching payments to invoices involves:

1. Selecting an invoice via the checkbox
2. Observing how the Payments table updates
3. Initiating a payment with the payment action button
4. Entering the payment amount
5. Saving the payment

This functionality ensures proper tracking and association between payments and their corresponding invoices.