



COMMUNITY  
INVESTMENT  
TRUST

---

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

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## Chapter 1

# My Accounts Category

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

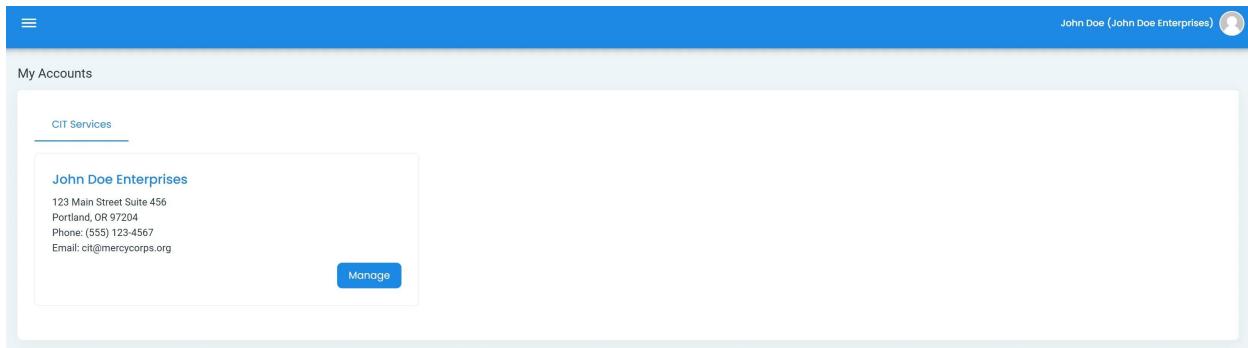


Fig. 1: CIT App, My Accounts Screen, Homepage

The main feature of the Page: My Accounts Page is that it allows you *Manage Different Accounts*

### Note

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

For more on navigation and the primary sidebar, see General Sidebar Navigation page.



## Chapter 2

# Table of Contents

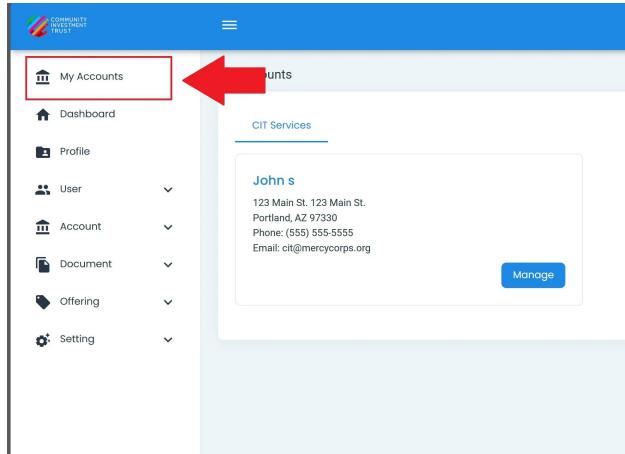
## 2.1 My Accounts

### 2.1.1 Managing Different Accounts

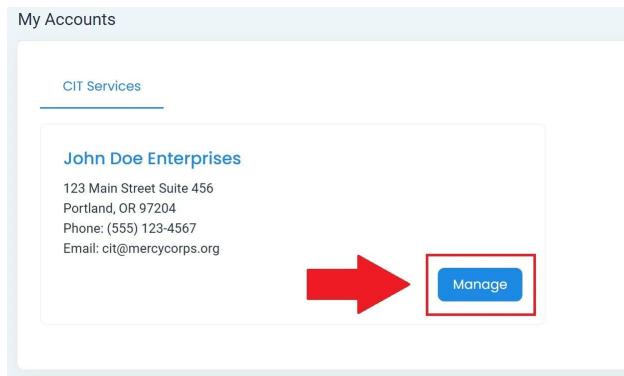
Managing accounts allows you to quickly navigate between the homepages of different accounts.

To **Manage an Account**:

1. Go to the My Accounts Category: account\_balance 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.



### 2.1.1.1 Identifying the Current Account

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



The account name is the name surrounded by parentheses

#### Account Name Example

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

It is:

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

## 2.2 Dashboard

Welcome to the Section: Dashboard section. This area provides a high-level overview of various document types and their statuses, presented as interactive tiles.

## 2.2.1 Dashboard Tiles

### Hover Over or Click a Tile to Explore Further

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

#### Dashboard Tiles:

Below is a list of the main tiles and their descriptions (in PDF format):

- **Sponsorship Organizations:** Provides the number of Sponsorship Organizations.
- **CIT Corporations:** Provides the number of CIT Corporations.
- **Pending CIT Corporations:** Provides the number of CIT Corporations going through the Onboarding Process.
- *Offering Year 2010*: Provides details for specific Offering Year with Year filter set for 2010.
- *Offering Year 2025*: Provides details for specific Offering Year with Year filter set for 2025.
- **Onboarding Documents:** Provides number of Onboarding Documents pending for approval from a specific CIT Corporation.
- **Offering Documents:** Provides number of Offering Documents pending for approval from a specific CIT Corporation.

### 2.2.1.1 Dashboard Tables

The Section: 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*

#### 2.2.1.1.1 Dashboard Table Locations

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

#### CIT Corporation Summary Table

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

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

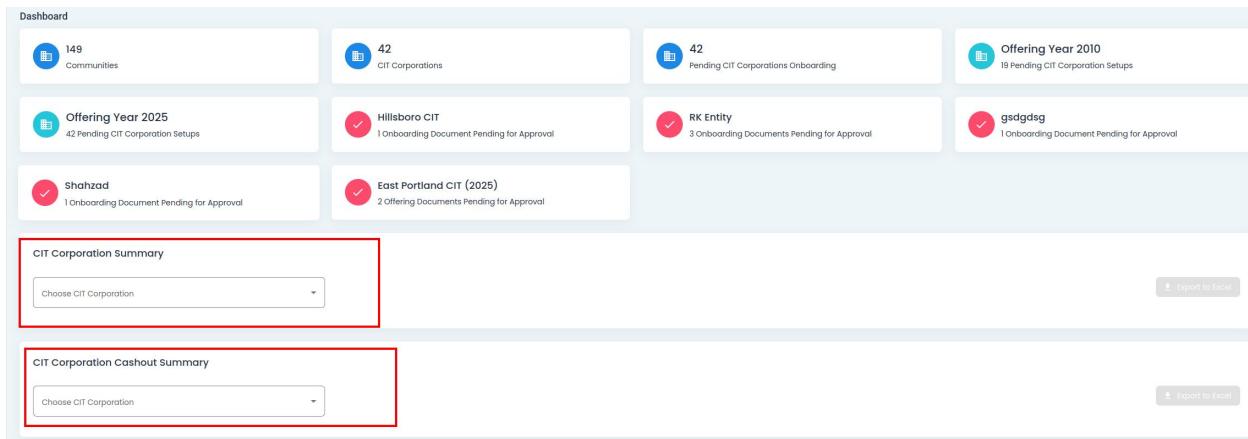


Fig. 1: Dashboard, Main Tables

## Location: CIT Corporation Summary Table

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

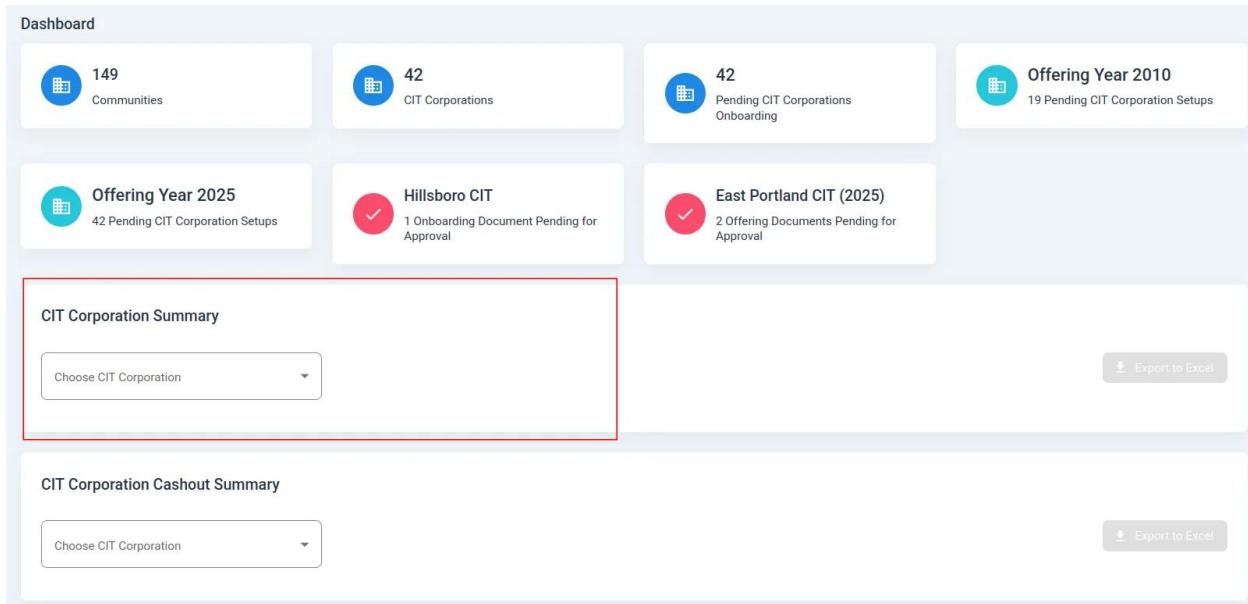


Fig. 2: Dashboard, CIT Corporation Summary Table Location

## 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									

Fig. 3: Dashboard, CIT Corporation Summary Table Columns Explained

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

- Column: Offering Year: The calendar year in which the Offering occurred.
- Column: Authorized Shares: The total number of shares authorized for issuance under the Offering.
- Column: Number of Shares Available for Sale: The total shares currently available for sale, including both new and existing (previously issued) shares.
- Column: Number of New Shares Available for Sale: The number of newly issued shares that have not yet been sold.
- Column: Total Current Investment Amount: The total amount currently invested in the Offering.
- Column: Total Cashout Shares: The total number of shares issued specifically for cashing out under the Offering.
- Column: LC Limit: The lowest price a stock can reach during a single trading session.
- Column: Total Original Cashout Amount: The total amount of shares that have been cashed out under the Offering.
- Column: Total Cashout Shares: The total number of shares that have been cashed out under the Offering.

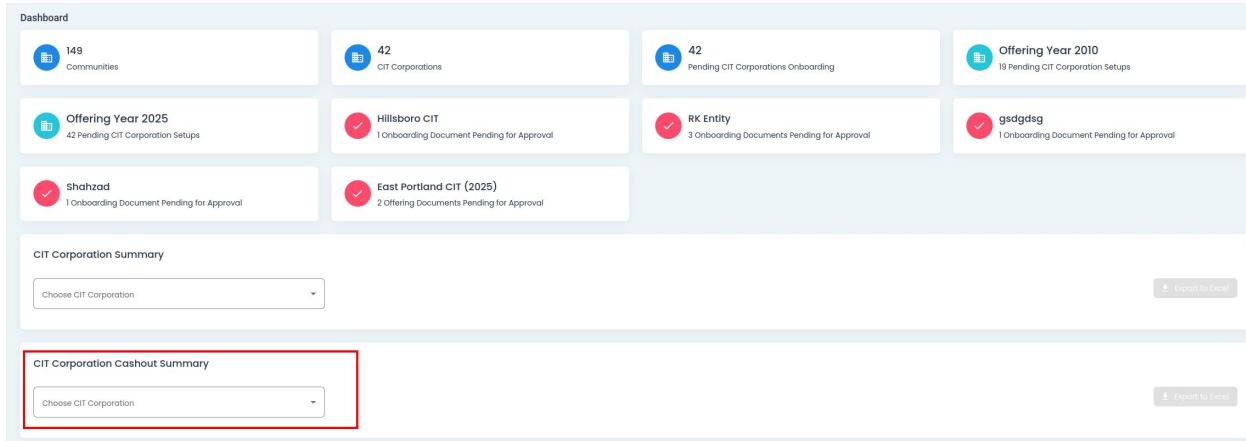
## CIT Corporation Cashout Table

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

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

## Location: CIT Corporation Cashout Table

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



The screenshot shows the CIT Services Dashboard. At the top, there are several summary cards: 'Dashboard' (149 Communities), 'CIT Corporations' (42), 'Pending CIT Corporations Onboarding' (42), 'Offering Year 2010' (19 Pending CIT Corporation Setups), 'Offering Year 2025' (42 Pending CIT Corporation Setups), 'Hillsboro CIT' (1 Onboarding Document Pending for Approval), 'RK Entity' (3 Onboarding Documents Pending for Approval), 'Shahzad' (1 Onboarding Document Pending for Approval), and 'East Portland CIT (2025)' (2 Offering Documents Pending for Approval). Below these is a 'CIT Corporation Summary' section with a dropdown menu 'Choose CIT Corporation' and an 'Export to Excel' button. The 'CIT Corporation Cashout Summary' section is highlighted with a red box. It also has a dropdown menu 'Choose CIT Corporation' and an 'Export to Excel' button.

Fig. 4: Dashboard, CIT Corporation Cashout Table Location

## Columns: CIT Corporation Cashout Table



The screenshot shows the 'CIT Corporation Cashout Summary' table on the dashboard. The table has a header row with columns: Offering Year, Number of Investors, Number of Investors Resubscribe, Reason Percentage, Number of Shares, Total Amount Cashed Out, Total Original Investment Amount, and Total Amount of Appreciation. Below the header is a single data row for '2025' with values: 2, 1, 'Education 50%, Emergency 50%', 8,381, '\$12856', '\$35.00', and '\$93.58'. The entire table area is highlighted with a red box.

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

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

- Column: Offering Year: The calendar year in which the Offering occurred.
- Column: Authorized Shares: The total number of shares authorized for issuance under the Offering.
- Column: Number of Shares Available for Sale: The total shares currently available for sale, including both new and existing (previously issued) shares.
- Column: Number of New Shares Available for Sale: The number of newly issued shares that have not yet been sold.
- Column: Total Current Investment Amount: The total amount currently invested in the Offering.
- Column: Total Cashout Shares: The total number of shares issued specifically for cashing out under the Offering.
- Column: LC Limit: The lowest price a stock can reach during a single trading session.
- Column: Total Original Cashout Amount: The total amount of shares that have been cashed out under the Offering.
- Column: 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 Table: 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



Fig. 6: Dashboard, CIT Corporation Summary Section

**Step 2:** Click Dropdown and Select CIT Corporation

Offering Year	Authorized Shares	Number of Shares Available for Sale	Number of New Shares Available for Sale	Total Current Investment Amount	Total Current Shares	Total Current Value of Investment	LC Limit	Total Original Cashout Amount	Total Cashout Shares
2024	45,000	0	0	\$0.00	0	\$0.00	\$0.00	\$0.00	0
2025	45,000	147.36	147.36	\$0.00	0	\$0.00	\$3,242.00	\$0.00	0
2025	45,000	160.21	160.21	\$0.00	0	\$0.00	\$3,422.00	\$0.00	0
2025	45,000	285.17	285.17	\$0.00	0	\$0.00	\$3,422.00	\$0.00	0

Over the course of all years  
Total Investment Amount: \$0.00  
Total Shares: 0

Fig. 7: Dashboard, CIT Corporation Summary Dropdown Expanded

### Table Expands

The table will expand to show the CIT Corporation details.



The screenshot shows a dashboard titled 'CIT Corporation Summary'. At the top, there is a dropdown menu labeled 'Choose CIT Corporation' with 'East Portland CIT' selected. To the right of the dropdown is a blue button labeled 'Export to Excel'. The main area contains a table with the following data:

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

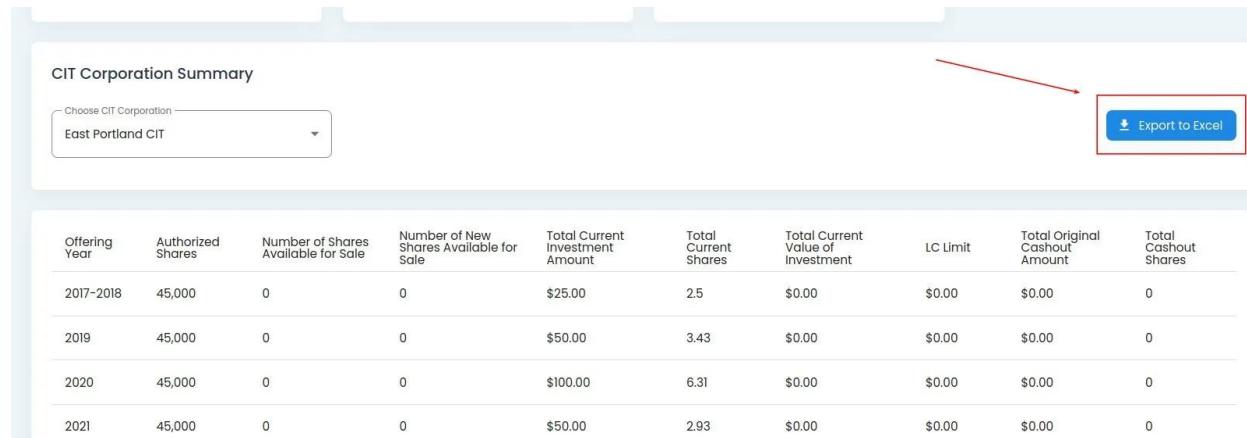
Fig. 8: Dashboard, CIT Corporation Summary Table Expanded

### How to Export Table

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

#### To do so:

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



The screenshot shows the same dashboard and table as Fig. 8. A red arrow points from the text 'To do so:' to the 'Export to Excel' button. The button is located to the right of the dropdown menu and is highlighted with a red box.

Fig. 9: Dashboard, CIT Corporation Summary Table Export Button Location

### Export File Successfully Downloaded

The Green Option: Excel file will be downloaded to your default download location.

## 2.3 Profile

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

### Table of Contents

- *Profile Location*
- *Profile Information*
- *Upload Logo*

### 2.3.1 Profile Location

The Page: Profile page is the third item listed in the Item: Primary Sidenavigation menu.

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

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

### 2.3.2 Profile Information

The Section: Profile Information section allows you to modify your company details, it opens up to a form that is split into **three** sections:

- *Name and Contact Information*
- *Primary Address*
- *Mailing Address*

#### Note

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

### 2.3.3 Upload Logo

#### To Upload:

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

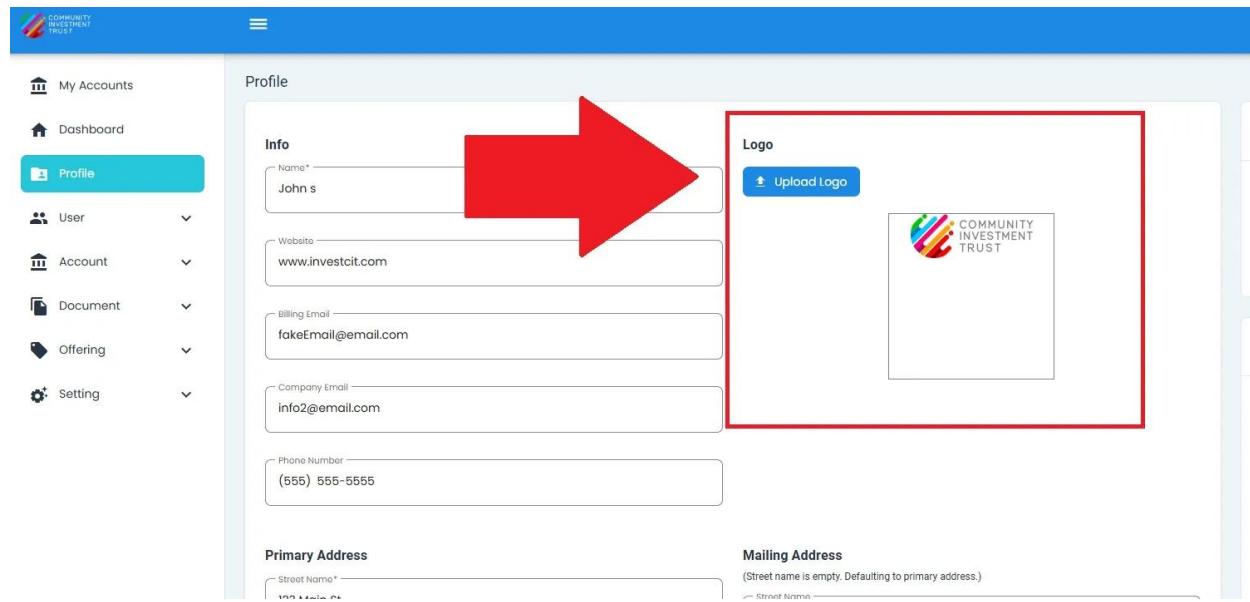


Fig. 10: Upload Logo Location

### 2.3.3.1 Name and Contact Information

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

#### 2.3.3.1.1 Location: Name and Contact Information section

The Section: Name and Contact Information section is the first section of the Profile Information section. It's located at the top-left of the page:

The following fields can be edited:

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

#### 2.3.3.2 Primary Address

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

##### Note

This will be used as your Item: Billing Address. It will be default as your Mailing Address unless otherwise specified.

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

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**



**Primary Address**

Street Name\*  
123 Main St.

Suite/Apt Number  
123 Main St.

City\*  
Portland

State\*  
Arkansas

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

Street Name  
97330

Suite/Apt Number

City  
Scottsdale

State  
Wyoming

Fig. 11: Name and Contact Information Location

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**



**Primary Address**

Street Name\*  
123 Main St.

Suite/Apt Number  
123 Main St.

City\*  
Portland

State\*  
Arkansas

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

Street Name  
97330

Suite/Apt Number

City  
Scottsdale

State  
Wyoming

Fig. 12: Primary Address Location

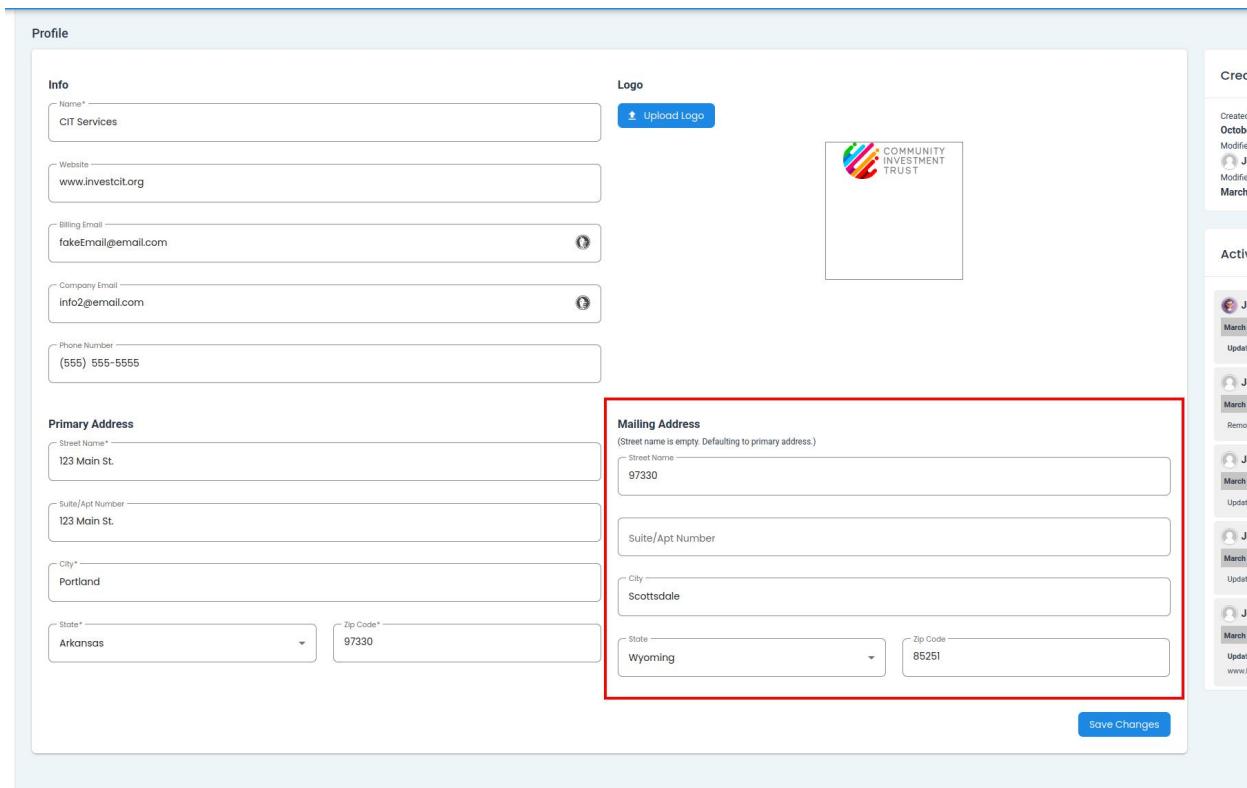
- Item Required: Street Name
- Tab: Suite/Apt Number
- Item Required: City
- Item Required: State
- Item Required: Zip Code

### 2.3.3.3 Mailing Address

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

#### 2.3.3.3.1 Location: Mailing Address section

The Section: Mailing Address section can be found near the bottom of the Page: Profile page.



The screenshot shows the 'Profile' page with the 'Info' section on the left and the 'Mailing Address' section on the right, both highlighted with a red box. The 'Info' section contains fields for Name, Website, Billing Email, Company Email, and Phone Number. The 'Mailing Address' section contains fields for Street Name, Suite/Apt Number, City, State, and Zip Code. A logo for 'COMMUNITY INVESTMENT TRUST' is displayed on the right. A sidebar on the right shows a list of activities and a 'Save Changes' button at the bottom.

Fig. 13: Mailing Address Location

#### Note

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

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

- Street Name

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

## 2.4 User

The following Section: Sections are included in the peopleUser Category: User category:

- *User Accounts*
- *Staff Accounts*

### 2.4.1 Users

The Section: 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.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action	
Anissa Zolani	anissa@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	devsey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active		
John Service	cjt@transferonline.com	304	12/31/2024 @ 01:49 PM	Active		
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active		
Mohd Shoaib	mohd.shoaib@techsheedcorp.com	268	01/06/2025 @ 05:19 AM	Active		
Ponkaj CIT	ponkaj.joshi@techsheedcorp.com	0		Activation Pending		

Staff Homepage #

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

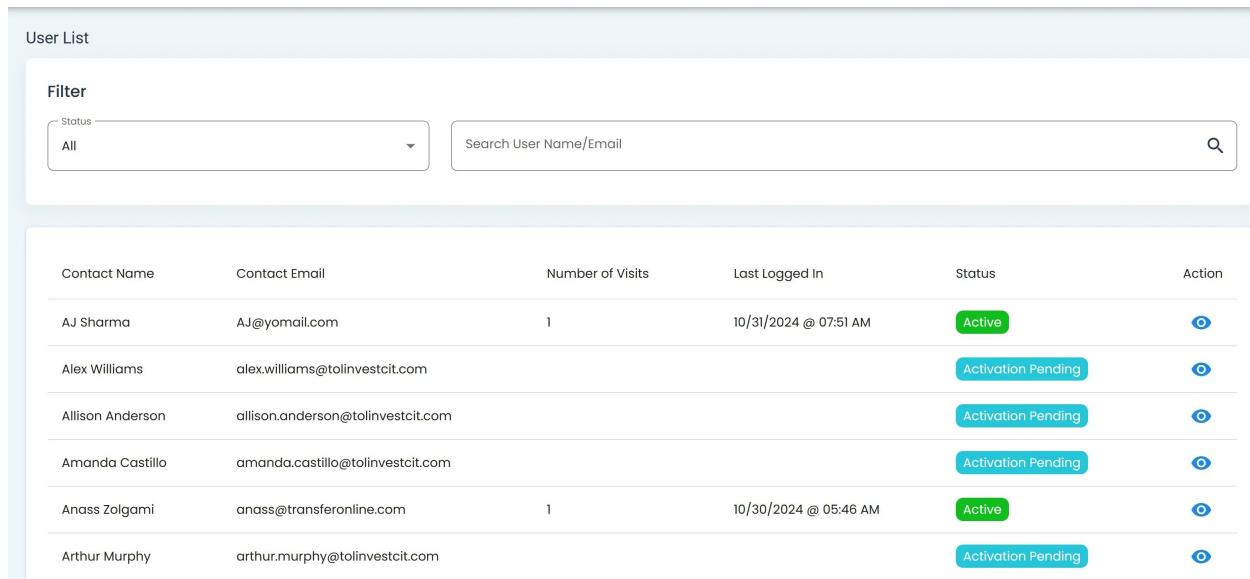
💡 Hover for Page Preview Click to show ▾

#### 2.4.1.1 User List Homepage

The Section: Users section opens up to the Table: User List table:

#### Need help finding the Staff Homepage?

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



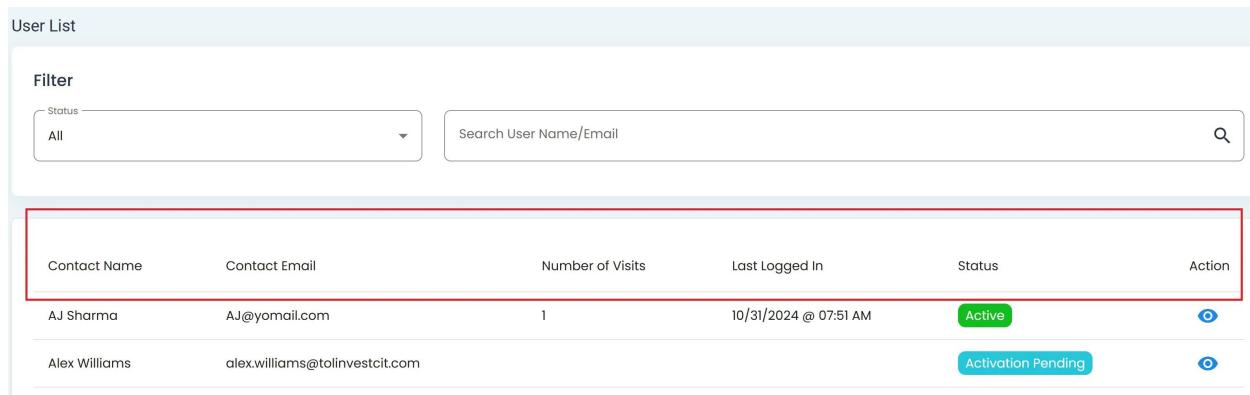
User List

Filter

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	
Allison Anderson	allison.anderson@tolinvestcit.com			Activation Pending	
Amanda Castillo	amanda.castillo@tolinvestcit.com			Activation Pending	
Anass Zolgami	anass@transferonline.com	1	10/30/2024 @ 05:46 AM	Active	
Arthur Murphy	arthur.murphy@tolinvestcit.com			Activation Pending	

Fig. 14: Users, User list Table

#### 2.4.1.2 Columns: User List Table



User List

Filter

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	

Fig. 15: User, User, Column Options

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

- Column: Contact Name
- Column: Contact Email
- Column: Number of Visits
- Column: Last Logged In
- Column: Status (Green Option: Active or Item: Inactive)
- Column: Action

#### 2.4.1.3 Search and Filter Options

The Table: 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.

#### 2.4.1.4 Status Options

The Item: Status dropdown includes five different options:

- Option: All (Shows all users regardless of status)
- Green Option: Active
- Item: Inactive
- Teal Option: Pending Activation
- Reference to Locked Out itemLocked Out

##### To Filter Users by Status:

1. Click the Item: Status dropdown at the top of the user list.
2. Select your desired filter option.

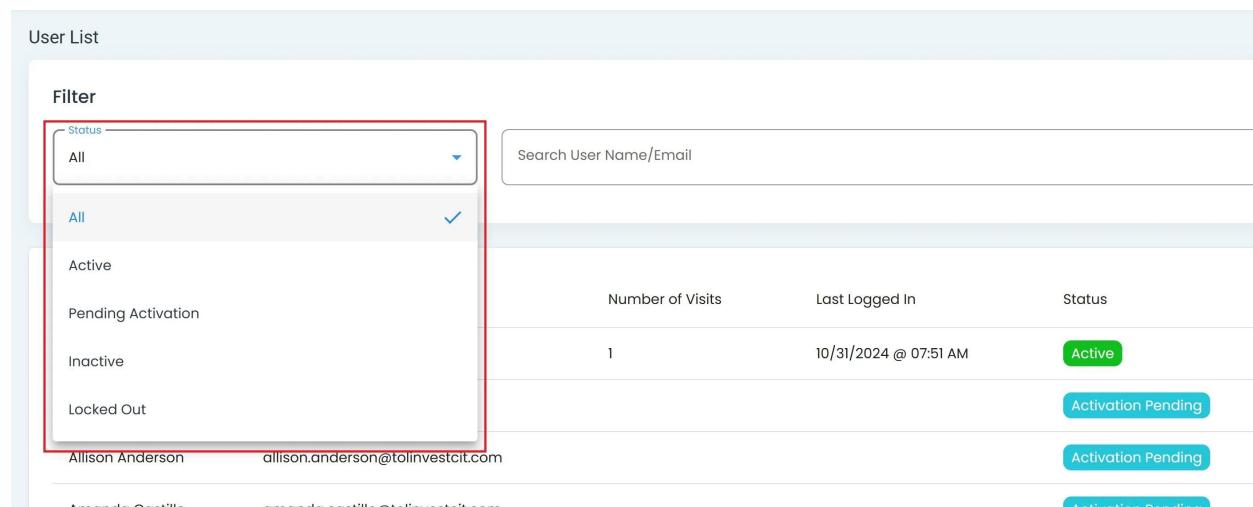


Fig. 16: User, User Homepage, Status Filter Dropdown

3. The table updates automatically to display matching users.

### 2.4.1.5 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

#### 2.4.1.5.1 Users Homepage Location

##### To Find the Staff List Homepage:

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

##### Don't see the sidenav?

See How to Toggle Primary Sidebar for more information.

2. Select the dropdown for the Navigation Category: User category.

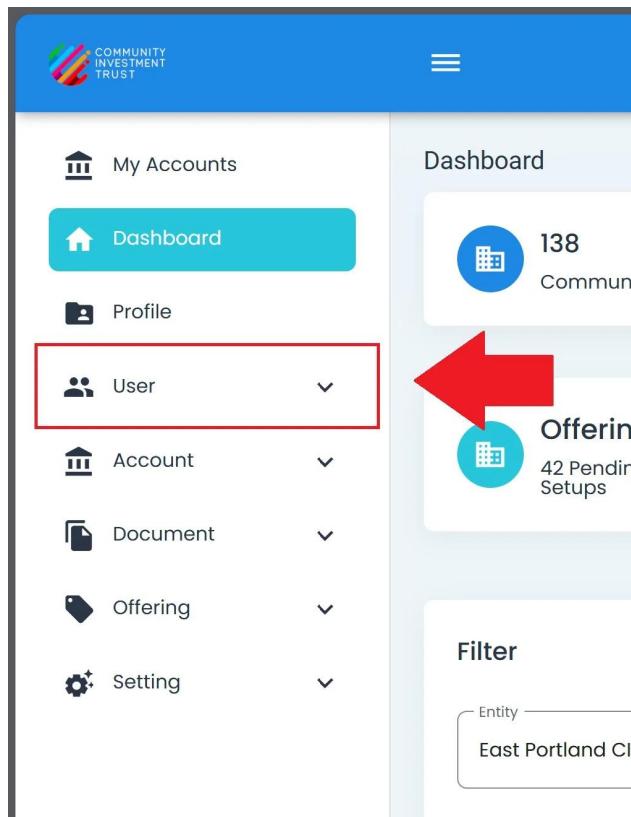
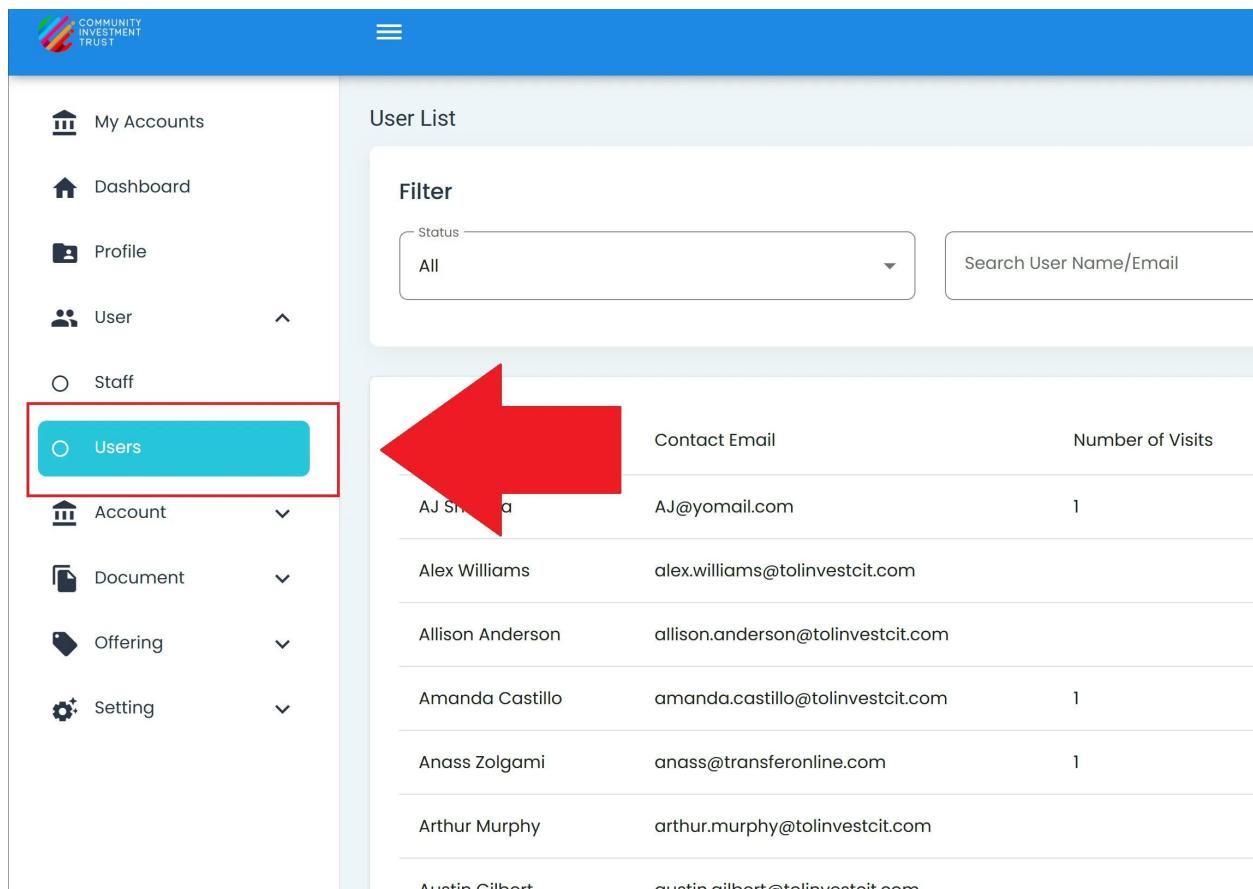


Fig. 17: User, Staff Primary Sidenav Location

3. Select Section: Users from the dropdown.



The screenshot shows the CIT Services User Homepage. The left sidebar contains a navigation menu with the following items:

- My Accounts
- Dashboard
- Profile
- User (selected, indicated by a red box)
- Staff
- Users (selected, indicated by a red box)
- Account
- Document
- Offering
- Setting

The main content area is titled "User List" and features a "Filter" section with a dropdown set to "All" and a search bar. A large red arrow points to the first row of the user list table. The table has columns for "Contact Email" and "Number of Visits". The data in the table is as follows:

Contact Email	Number of Visits
AJ Shrestha	1
Alex Williams	
Allison Anderson	
Amanda Castillo	1
Anass Zolgami	1
Arthur Murphy	
Austin Gilbert	

Fig. 18: Users Homepage

## 2.4.2 Staff

The Section: Staff 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*

### 2.4.2.1 Staff List Homepage

The Section: Staff section opens up to the Table: Staff List 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 Podeyn	cpodeyn@transferonline.com	7	12/19/2024 @ 11:47 AM	Active	 
John Doe	dlevsey@transferonline.com	50	01/06/2025 @ 06:51 AM	Active	 
John Service	cit@transferonline.com	304	12/31/2024 @ 01:49 PM	Active	 
John Vo	john@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	 
Mohd Shazad	mohd.shazad@techaheadcorp.com	288	01/06/2025 @ 05:19 AM	Active	 
Pankaj CIT	pankaj.joshi@techaheadcorp.com	0		Activation Pending	 

Fig. 19: 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.

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Aliass Zolghami	aliass@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	doevey@transferonline.com	50	01/06/2025 @ 06:01 AM	Active	
John Service	ctg@transferonline.com	304	12/21/2024 @ 01:49 PM	Active	
John Vo	jph@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	
Mohd Rashed	mohd.rashed@techtheadcorp.com	268	01/06/2025 @ 05:19 AM	Active	
Ponkaj CIT	ponkaj.joshi@techtheadcorp.com	0		Activation Pending	

**Staff List Homepage**

Features: Staff List Table

Filter by Status

View Staff Details and Other Remaining Sections

Staff Homepage #

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

💡 Hover for Page Preview Click to show ▾

### 2.4.2.2 Features: Staff List Table

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

These details include details related to or including:

- Item: Contact Information, or
- Item: Status.

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

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

#### 2.4.2.2.1 Columns: Staff List Table

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

These Column: Columns include:

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

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	pankaj.joshi@techaheadcorp.com	0		Activation Pending	  

Fig. 20: Users, Staff Homepage, Columns

#### 2.4.2.3 Filter by Status

The Column: Status column indicates the current status of the account.

Possible Option: Status options include:

- Item: All
- Green Option: Active
- Cyan Option: Pending Activation
- Item: Inactive
- Reference to Locked Out itemLocked 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	pankaj.joshi@techaheadcorp.com	0		Activation Pending	  

#### 2.4.2.4 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

##### 2.4.2.4.1 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 Navigation Category: User category.

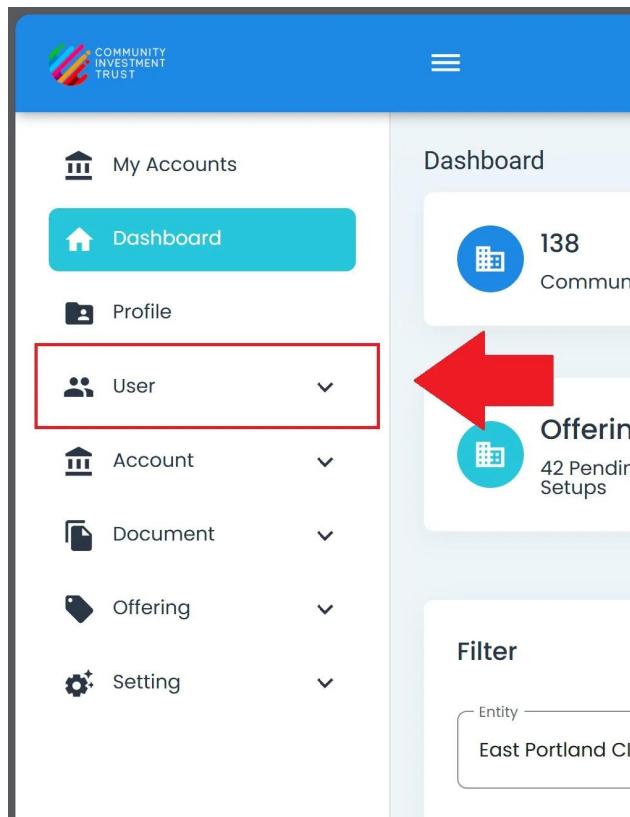


Fig. 21: User, Staff Primary Sidenav Location

3. Select Section: Staff from the dropdown.

## 2.5 Account

The following Section: Section(s) are included in the account\_balanceAccount Category: Account category:

- *Investors*

### 2.5.1 Investors

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

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

Fig. 22: Investors List Homepage

#### 2.5.1.1 Overview

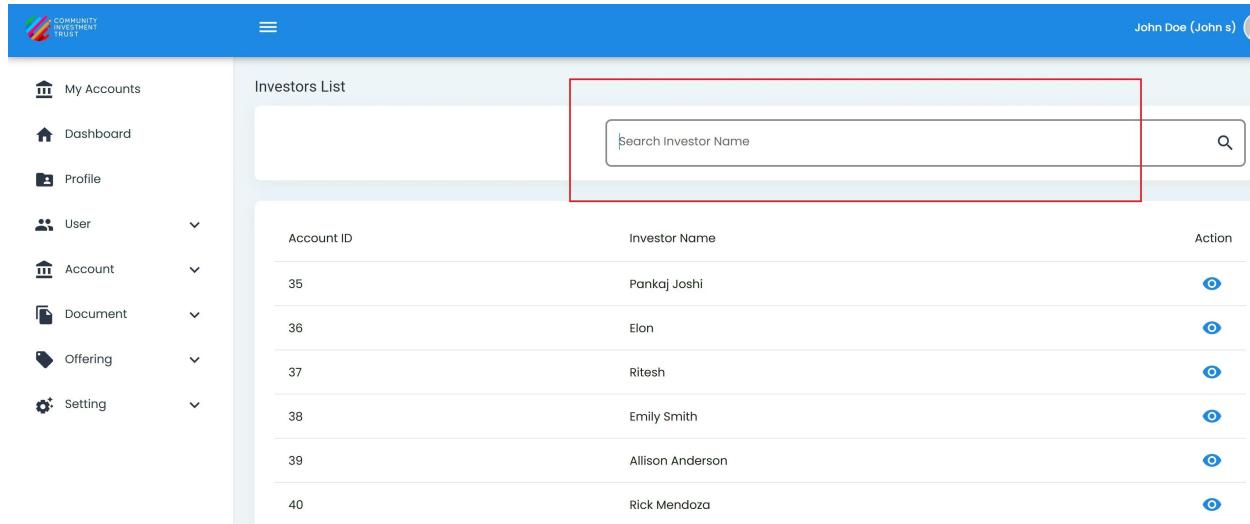
The Section: Investors List displays all registered investors and provides tools to search, view, and manage investor records.

#### 2.5.1.2 Search Functionality

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

#### 2.5.1.3 Investors Table

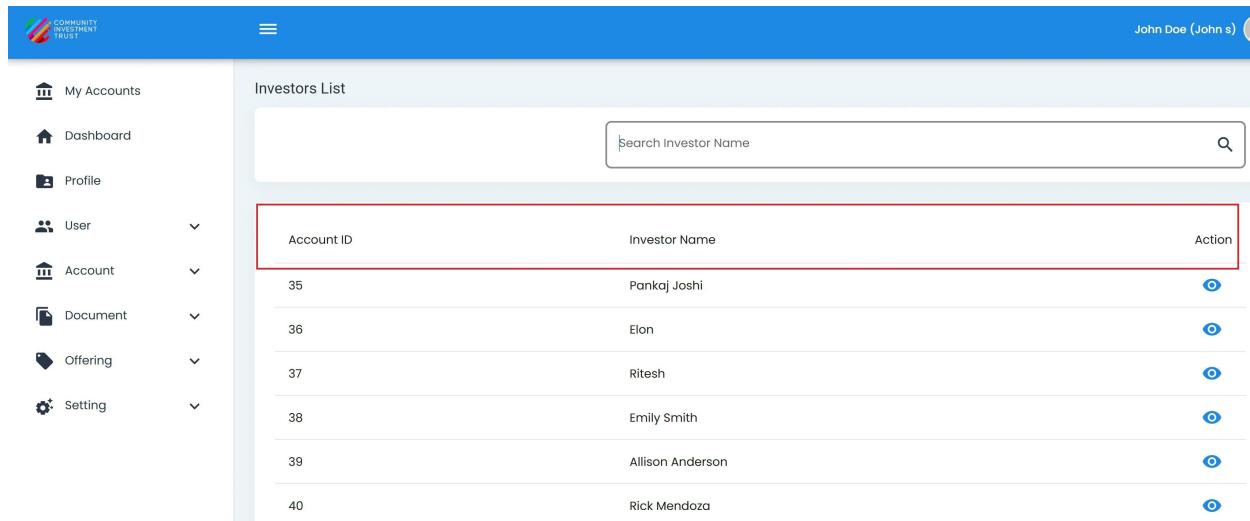
The Table: Investors Table displays key information about each investor in the system:



The screenshot shows the 'Investors List' page. The top navigation bar includes the 'COMMUNITY INVESTMENT TRUST' logo, a three-line menu icon, and a user profile 'John Doe (John s)'. The left sidebar contains links for 'My Accounts', 'Dashboard', 'Profile', 'User', 'Account', 'Document', 'Offering', and 'Setting'. The main content area is titled 'Investors List' and features a search bar with the placeholder 'Search Investor Name' and a magnifying glass icon. Below the search bar is a table with the following data:

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

Fig. 23: Investors List, Search Bar Location



The screenshot shows the 'Investors List' page. The top navigation bar includes the 'COMMUNITY INVESTMENT TRUST' logo, a three-line menu icon, and a user profile 'John Doe (John s)'. The left sidebar contains links for 'My Accounts', 'Dashboard', 'Profile', 'User', 'Account', 'Document', 'Offering', and 'Setting'. The main content area is titled 'Investors List' and features a search bar with the placeholder 'Search Investor Name' and a magnifying glass icon. Below the search bar is a table with the following data:

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

Fig. 24: Investors List, Table Column Names

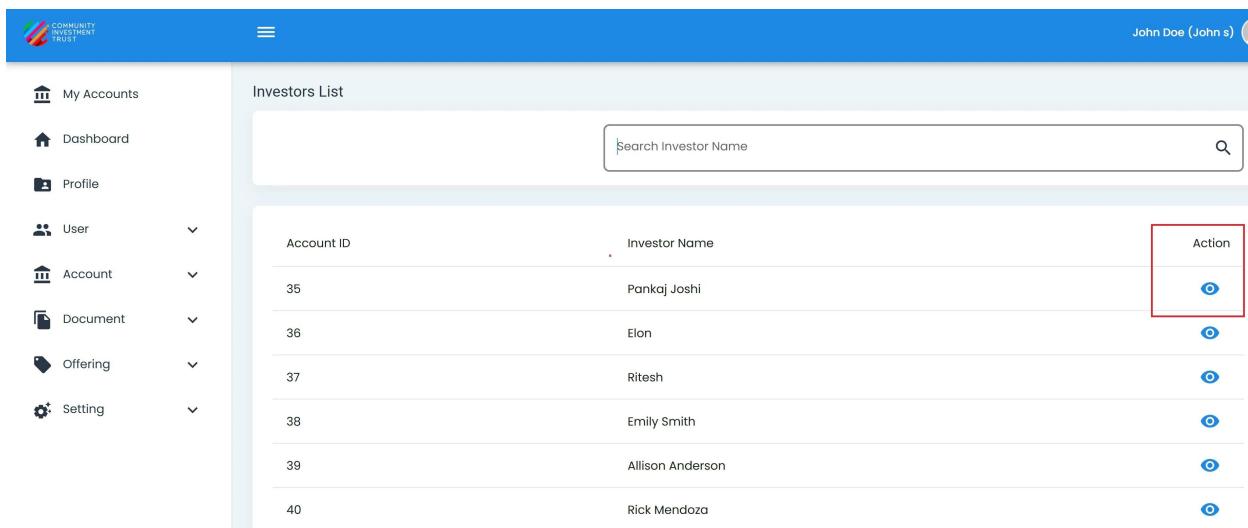
### 2.5.1.3.1 Table Columns

The Table: Investors Table contains the following columns:

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

### 2.5.1.3.2 Action Column

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



The screenshot shows a user interface for managing investors. On the left is a sidebar with a logo and navigation links: My Accounts, Dashboard, Profile, User (with a dropdown arrow), Account (with a dropdown arrow), Document (with a dropdown arrow), Offering (with a dropdown arrow), and Setting (with a dropdown arrow). The main area is titled 'Investors List' and contains a search bar with the placeholder 'Search Investor Name'. Below the search bar is a table with columns: 'Account ID', 'Investor Name', and 'Action'. The 'Action' column is highlighted with a red box. The table data is as follows:

Account ID	Investor Name	Action
35	Pankaj Joshi	<input type="button" value="○"/>
36	Elon	<input type="button" value="○"/>
37	Ritesh	<input type="button" value="○"/>
38	Emily Smith	<input type="button" value="○"/>
39	Allison Anderson	<input type="button" value="○"/>
40	Rick Mendoza	<input type="button" value="○"/>

Fig. 25: Investors List, Action Column Location

### Available Actions

The Column: Action column includes the following operations:

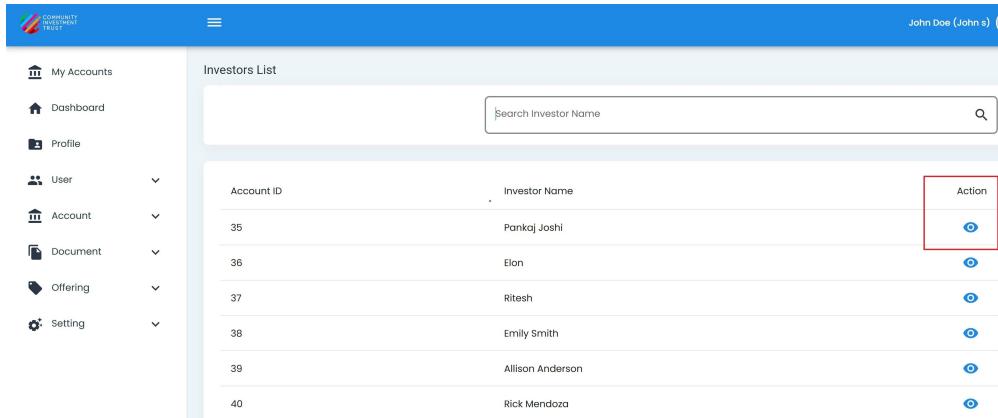
- *View More Details* - View and edit detailed information about the Investor

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



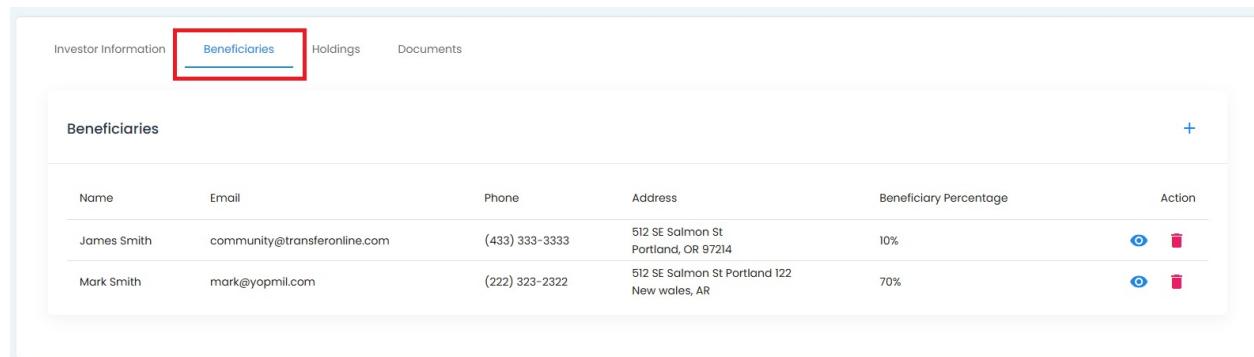
Account ID	Investor Name	Action
35	Pankaj Joshi	
36	Elon	
37	Ritesh	
38	Emily Smith	
39	Allison Anderson	
40	Rick Mendoza	

Fig. 26: Investors List, View Action Location

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

### Beneficiaries Tab

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



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%	

Fig. 27: Investor Details, Beneficiaries Tab Location

### Beneficiaries Tab Overview

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

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%	

Fig. 28: Investor Details, Beneficiaries Tab View

## Beneficiary Table

The Table: Beneficiaries Table contains the following columns:

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

## Available Actions

The Column: Action column allows you to:

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

### How to Add a New Beneficiary

See Add New Beneficiary for more information.

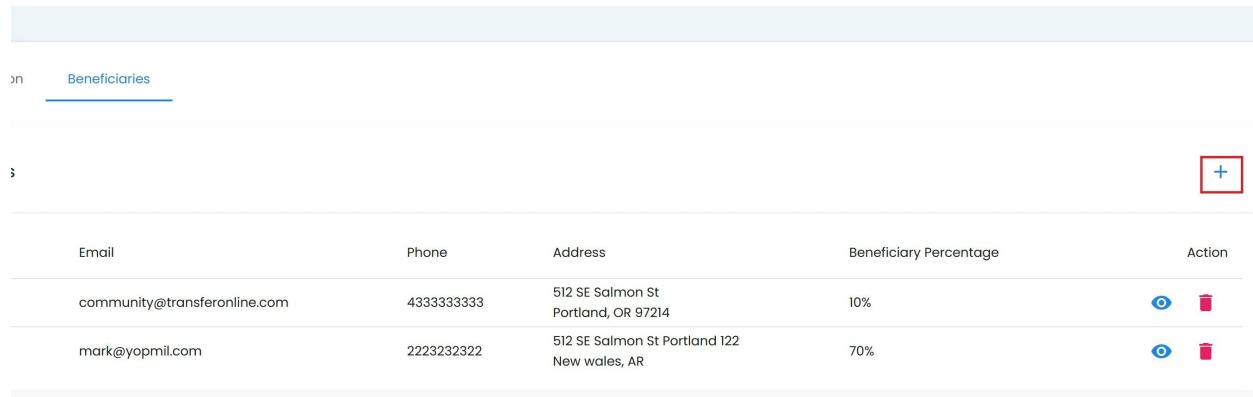
## Adding a New Beneficiary

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

1. Click the plus icon [+] at the top right of the Table: Beneficiaries Table.
2. The Add Beneficiary popup will appear.
3. Place cursor in desired field.
4. Fill in relevant information.

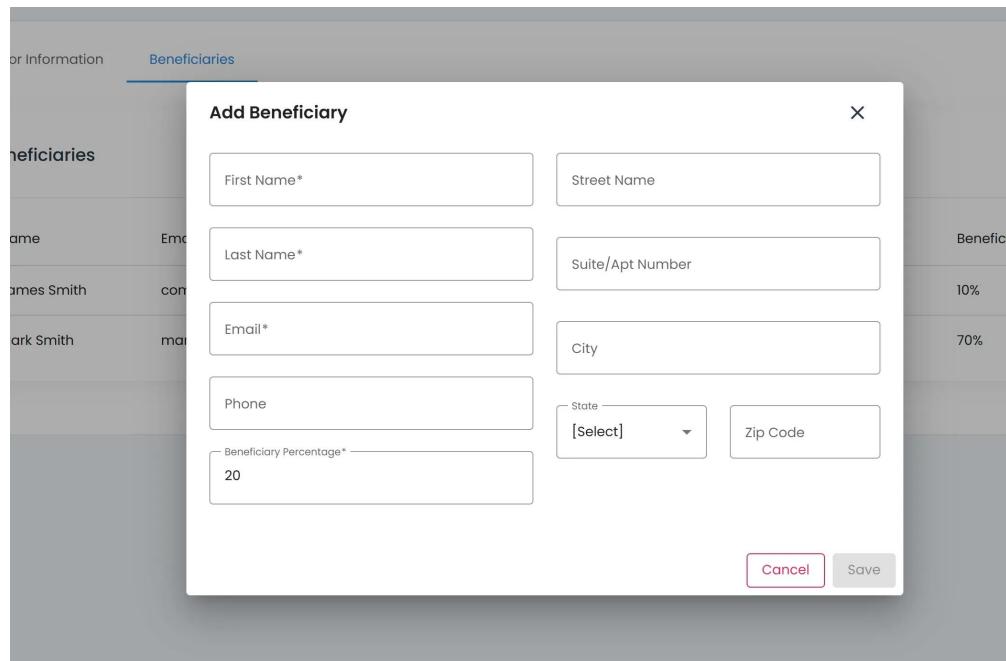
### Possible fields include:

- Item Required: First Name (required)



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%	 

Fig. 29: Investor Details, Add Beneficiary Button Location



**Add Beneficiary**

First Name\*

Street Name

Last Name\*

Suite/Apt Number

Email\*

City

Phone

Beneficiary Percentage\*  [Select]

Zip Code

Fig. 30: Add Beneficiary Popup

- Item Required: Last Name (required)
- Item Required: Email (required)
- Tab: Phone (optional)
- Item Required: Beneficiary Percentage (required)
- Tab: 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 Tab: 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 Tab: Investor Details tab will be the second tab that appears when [Viewing Investor Information](#).

**Note**

- Item Required: Red items are *required* and cannot be left blank.
- Tab: Blue items are *optional*.

Investor: Pankaj Joshi

Investor Information      Beneficiaries

**Investor Info**

Name\* Pankaj Joshi      SSN 222-22-2222

Date Of Birth 9/29/1994

**Primary Address**

Street Name\* 1007 Rosewood Lane

Suite/Apt Number

City\* New York

State\* New York      Zip Code\* 10007

**Mailing Address**

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

Street Name

Suite/Apt Number

City

State [Select]      Zip Code

Fig. 31: Investor Details Tab Location

## Investor Information Section

The Section: 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
- Tab: Mailing Address

Investor information      Beneficiaries

**Investor Info**

Name\* Pankaj Joshi      SSN 222-22-2222

Date Of Birth 9/29/1994

Fig. 32: Investor Information Section

## Available Information

The Investor Details tab displays the following information categories:

### Personal Information

The Subsection: 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.

#### Note

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

## Holdings List Tab

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

#### Contents

- *Holdings List Tab*
  - *Location: Holdings Tab*
  - *Columns: Holdings List Table*
  - *Relevant Sections*

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

Street Name

Suite/Apt Number

City

Code\* — 204

State [Select] ▾

Zip Code

Save Changes

Fig. 33: Investor Details Save Changes

## Location: Holdings Tab

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



Fig. 34: Account, Investors, Investor Information, Holdings Tab

## Columns: Holdings List Table

The Table: Holdings table will have the following columns:

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

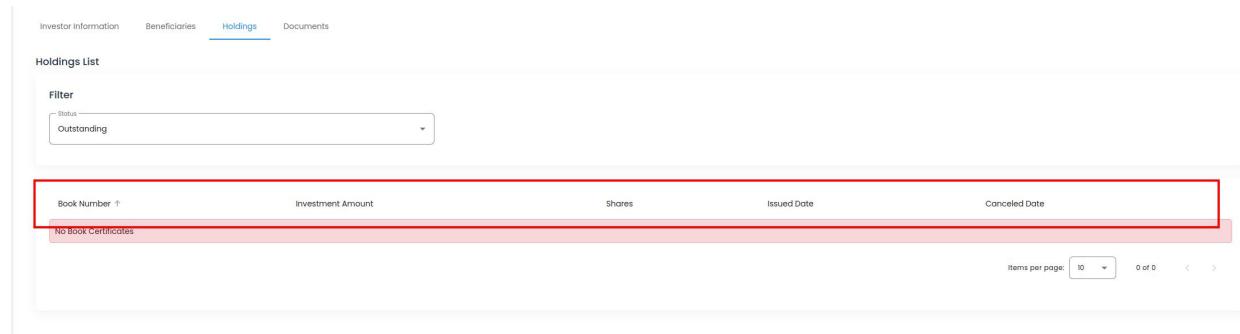


Fig. 35: Account, Investors, Investor Information, Holdings Tab, Columns Explained

### Relevant Sections

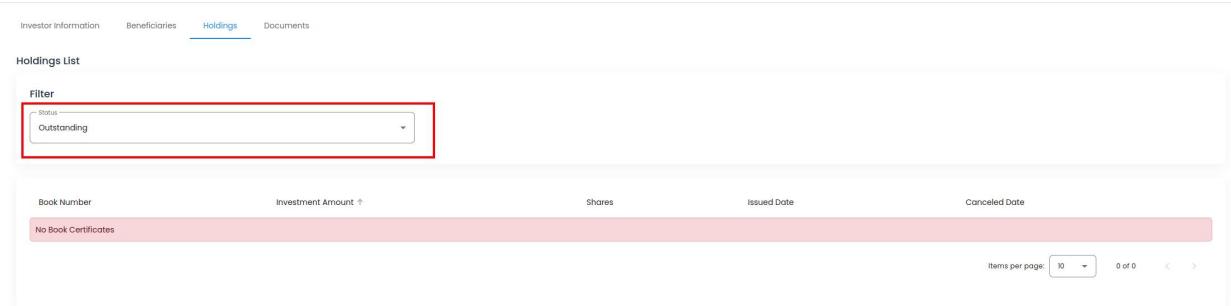
- See [Filter Holdings by Status](#) for more information on how to filter holdings by status.

### Filter Holdings by Status

You can filter the Table: Holdings List table by Option: Status.

#### To Filter Holdings by Status:

1. Find the Column: Status column.



The screenshot shows a user interface for managing holdings. At the top, there are tabs: 'Investor Information', 'Beneficiaries', 'Holdings' (which is underlined, indicating it is the active tab), and 'Documents'. Below the tabs is a section titled 'Holdings List' with a 'Filter' dropdown. The dropdown is set to 'Status' and has an option 'Outstanding' selected. The main table area has columns for 'Book Number', 'Investment Amount', 'Shares', 'Issued Date', and 'Cancelled Date'. A pink banner at the top of the table area says 'No Book Certificates'. At the bottom right of the table, there are buttons for 'Items per page' (set to 10), '0 of 0', and navigation arrows.

Fig. 36: Account, Investors, Investor Information, Holdings Tab, Status Filter Dropdown

2. Select the status you want to filter by.

### Available Statuses

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

- Option: Outstanding & Canceled
- Option: Outstanding
- Option: Canceled

### Action Complete

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

### Documents List Tab

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

### Contents

- [Documents List Tab](#)
  - [Location: Documents Tab](#)

- *Columns: Documents List Table*
- *Search for Documents*
- *Other Actions*
- \* *Available Actions*

### Location: Documents Tab



Fig. 37: Account, Investors, Investor Information, Documents Tab

### Columns: Documents List Table

The Table: Documents table will have the following columns:

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

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

Fig. 38: Account, Investors, Investor Information, Documents Tab, Columns Explained

### Search for Documents

1. Place cursor in search field.

Offering Documents

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

Fig. 39: Account, Investors, Investor Information, Documents Tab, Search Location

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

Investor Information      Beneficiaries      Holdings      Documents

Investor Info

Name* <input type="text"/>	SSN <input type="text"/>
Date Of Birth <input type="text"/>	Email* <input type="text"/>
Phone <input type="text"/>	

Primary Address

Portland St.	Street Name
Suite/Apt Number	Suite/Apt Number
City* <input type="text"/> Portland	City
State* <input type="text"/> Oregon	Zip Code* <input type="text"/> 97236

Mailing Address

Street Name	
Suite/Apt Number	
City	
State <input type="text"/>	Zip Code <input type="text"/>

Fig. 40: Account, Investors, Investor Information, Documents Tab, Search Results

### Other Actions

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

### Available Actions

The Column: 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 Item: User's default downloads folder.

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	

Fig. 41: Account, Investors, Investor Information, Documents Tab, Action Column Location

## 2.6 Document

This following Section: Sections are included in the file\_copyDocument Category: Document category:

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

### 2.6.1 CIT Corporation Onboarding Documents

#### Table of Contents

- *Features: CIT Corporation Onboarding*
- *Location: CIT Corporation Onboarding*
- *Table: Onboarding Documents List*
- *Onboarding Documents Table*

#### 2.6.1.1 Features: CIT Corporation Onboarding

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

The Section: CIT 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., Item: All, Item: Pending, or Item: Completed)
- *View document completion status*

### 2.6.1.2 Location: CIT Corporation Onboarding

The Page: CIT Corporation Onboarding section can be found under the file\_copyDocument Category: Document category.

### 2.6.1.3 Table: Onboarding Documents List

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

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

#### 2.6.1.3.1 CIT Onboarding Documents Table: Columns Explained

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

- Column: ID column - The Item: ID associated with the process itself.

##### Note

This Item: ID can be used for {insert significance of ID}

- Column: Sponsorship Organization column - The **Sponsorship Organization** that is sponsoring the onboarding process.
- Column: CIT Corporation column - The **CIT Corporation** that is being onboarded.
- Column: Document Complete column - Shows the number of onboarding documents a corporation has completed.
- Column: Pending For Approval column - Number of documents that have been submitted but are pending approval.
- Column: New Message column - Will show the number of new messages regarding the onboarding process.
- Column: Status column - Status of where the corporation is at on the Offering process (i.e., Cyan Option: All, Cyan Option: Pending, Cyan Option: Complete)
- Column: 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 Cyan Option: Descending or Cyan Option: Ascending by clicking on column name.

**CIT Corporation Onboarding Documents**

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

Fig. 42: CIT Corporation Onboarding, Location

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

Fig. 43: CIT Corporation Onboarding Section, Homepage, Onboarding Documents Table

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

### 2.6.1.3.2 Status Filters for Onboarding Documents Table

The table can be filtered by the following Statuses:

- Item: All
- Item: Pending
- Item: Completed

1. Find and select the Option: Status dropdown.

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Count
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	Hillsboro CIT	0	0 of 8

2. Select the desired status from the dropdown.

ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Count
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	Hillsboro CIT	0	0 of 8

#### Note

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

### 2.6.1.3.3 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.

### 2.6.1.3.4 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

### 2.6.1.4 Onboarding Documents Table

The Table: Onboarding Documents table is what first appears on the homepage of the Page: CIT 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 Table: 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*

## 2.6.2 CIT Onboarding Documents Table: Columns Explained

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

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

- Column: ID column - The Item: ID associated with the process itself.

### Note

This Item: ID can be used for {insert significance of ID}

- Column: Sponsorship Organization column - The **Sponsorship Organization** that is sponsoring the onboarding process.
- Column: CIT Corporation column - The **CIT Corporation** that is being onboarded.
- Column: Document Complete column - Shows the number of onboarding documents a corporation has completed.
- Column: Pending For Approval column - Number of documents that have been submitted but are pending approval.
- Column: New Message column - Will show the number of new messages regarding the onboarding process.
- Column: Status column - Status of where the corporation is at on the Offering process (i.e., Cyan Option: All, Cyan Option: Pending, Cyan Option: Complete)
- Column: 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 Cyan Option: Descending or Cyan Option: Ascending by clicking on column name.

## 2.6.3 CIT Corporation Offering

### Table of Contents

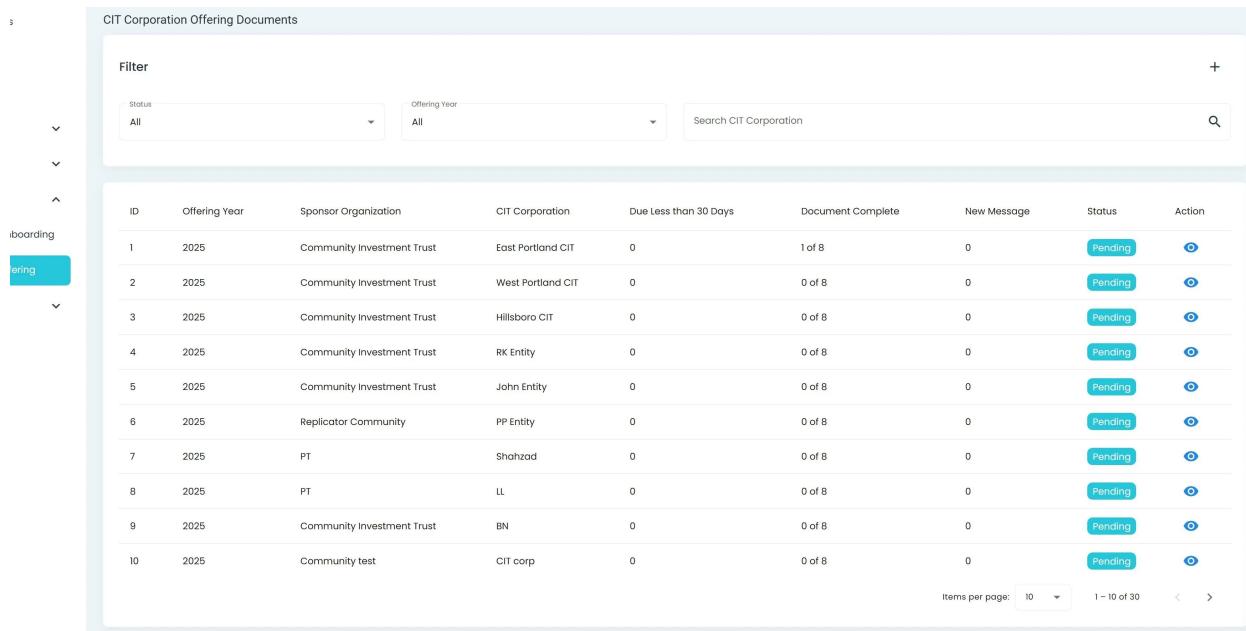
- *Features: CIT Corporation Offering*
- *Offering Documents Table*

### 2.6.3.1 Features: CIT Corporation Offering

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

This section also allows you to:

- *Quickly view important information about each offering*
- *Access in-depth offering details*
- *Filter by Offering Status* (i.e., Item: All, Item: Pending, or Item: Completed)
- *Filter by Offering Year*



ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Complete	New Message	Status	Action
1	2025	Community Investment Trust	East Portland CIT	0	1 of 8	0	Pending	
2	2025	Community Investment Trust	West Portland CIT	0	0 of 8	0	Pending	
3	2025	Community Investment Trust	Hillsboro CIT	0	0 of 8	0	Pending	
4	2025	Community Investment Trust	RK Entity	0	0 of 8	0	Pending	
5	2025	Community Investment Trust	John Entity	0	0 of 8	0	Pending	
6	2025	Replicator Community	PP Entity	0	0 of 8	0	Pending	
7	2025	PT	Shahzad	0	0 of 8	0	Pending	
8	2025	PT	LL	0	0 of 8	0	Pending	
9	2025	Community Investment Trust	BN	0	0 of 8	0	Pending	
10	2025	Community test	CIT corp	0	0 of 8	0	Pending	

Fig. 44: CIT Corporation Offering Homepage

### 2.6.3.2 Offering Documents Table

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

The Table: 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.

### 2.6.3.2.1 CIT Offering Documents Table: Columns Explained

CIT Corporation Offering Documents									
Filter									
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		

Fig. 45: CIT Offering Documents Table Columns

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

- Column: ID - The Item: ID associated with the process itself.

#### Note

This Item: ID can be used for {insert significance of ID}

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

### 2.6.3.2.2 CIT Offering Status Filter

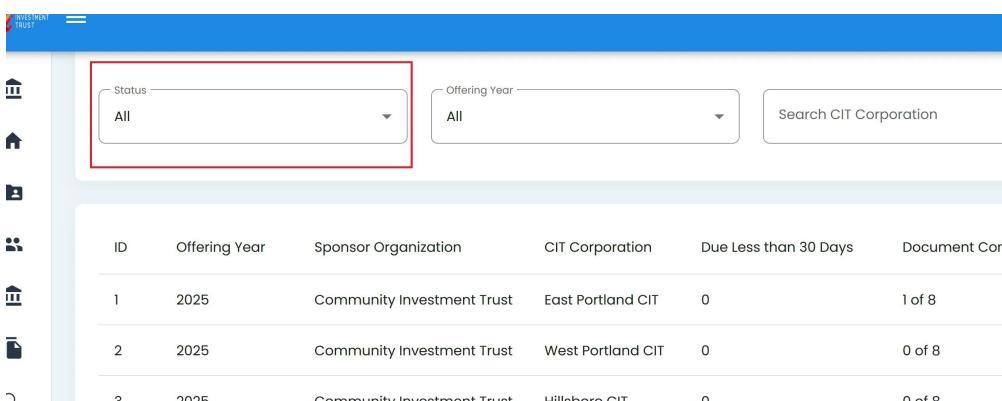
#### Status Filter Options

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

- Item: All
- Item: Pending
- Item: Completed

#### How to Filter by Status

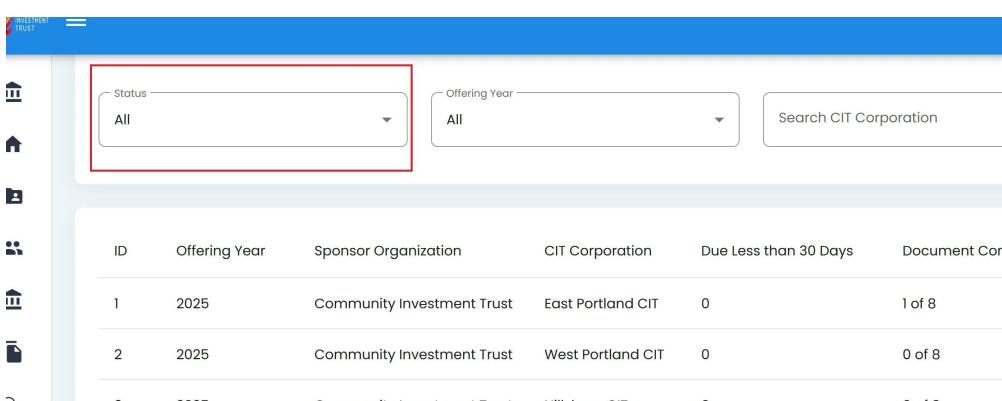
1. Find and select the Option: Status dropdown.



ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Count
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	Hillsboro CIT	0	0 of 8

Fig. 46: Status Filter Location

2. Select the desired status from the dropdown.



ID	Offering Year	Sponsor Organization	CIT Corporation	Due Less than 30 Days	Document Count
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	Hillsboro CIT	0	0 of 8

Fig. 47: Status Dropdown Options

#### Action Complete

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

## Status Types

### Status Types

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

### 2.6.3.2.3 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.

Offering List									
Filter									
Sponsor Organization/CIT Corporation									
All									
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 4383	\$12.00	\$0.00	\$0.00	\$0.00	01/10/2025	
Community Investment Trust	East Portland CIT	2025	fggggggggg	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025	

Fig. 48: 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

### 2.6.4 Investor Documents

The Page: Investor Documents Page allows you to quickly:

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

This section also allows you to:

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

Fig. 49: Investor Documents, Homepage and Location

#### 2.6.4.1 Table: Investor Documents

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

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

##### 2.6.4.1.1 Table Columns Explained

The table contains 7 columns:

- **ID** - Unique identifier associated with each document.
- **Investor** - Name of the investor.
- **CIT Corporation** - The CIT Corporation associated with the investor.
- **Offering Year** - Year of the investment offering.
- **Filename** - Name of the document file.
- **Document Type** - Type of the document (e.g., Subscription Agreement, Offering Document).

Investor Documents							
Filter							
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	 

Investor Documents							
Filter							
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	 

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

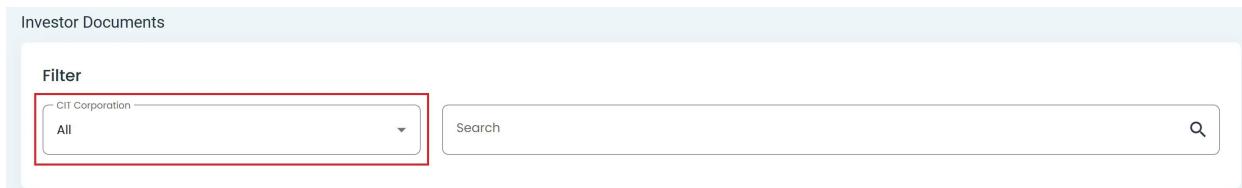
### Column Sorting

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

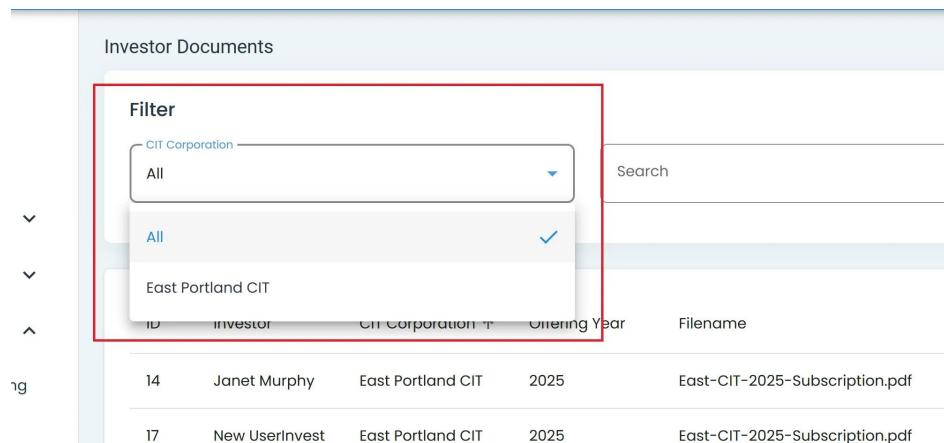
#### 2.6.4.1.2 Filter by CIT Corporation

You can filter the table by the CIT Corporation:

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



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



ID	Investor	CIT Corporation	Offering Year	Filename
14	Janet Murphy	East Portland CIT	2025	East-CIT-2025-Subscription.pdf
17	New UserInvest	East Portland CIT	2025	East-CIT-2025-Subscription.pdf

#### 2.6.4.1.3 How to Search Investor Documents

To search for a specific document or investor:

1. Find the **Search** bar.
2. Search by Column: Investor Name.
3. Press **Enter** or click the search icon to perform the search.

#### 2.6.4.1.4 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

```

#### 2.6.5 View More Details: Documents

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

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

##### Looking for an Overview?

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

#### 2.6.5.1 Layout Explanation

##### 2.6.5.1.1 View Details: Tabs Explained

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

- Deep Blue Option: All - All documents, regardless of status.
- Cyan Option: Upload Pending - Documents awaiting upload.
- Orange Option: Pending Approval - Documents awaiting approval.
- Green Option: Completed - Documents fully approved and completed.

# CIT Services User Manual for Entities, Release 1

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

Status  7 Document(s) left

All	8	<input checked="" type="checkbox"/> <b>Appraised value</b> File: EscrowAgreement.pdf   Uploaded on October 14, 2024 @ 3:55 PM by John Service   Due On: October 15, 2024   Approved on October 14, 2024 @ 4:26 PM by John Service <span>Complete</span>
Pending Upload	1	<input type="checkbox"/> <b>Board resolutions for share price change</b> File: Document 2.pdf   Uploaded on October 17, 2024 @ 3:40 PM by John Service   Due On: December 1, 2024 <span>Pending for Approval</span>
Pending Approval	2	<input type="checkbox"/> <b>Stock Offering Circular</b> File: Document Pending Upload   Due On: December 1, 2024   <span>Overdue</span>
Completed	1	<input type="checkbox"/> <b>Subscription Agreement</b> File: Document Pending Upload   Due On: December 1, 2024   <span>Overdue</span>
		<input type="checkbox"/> <b>Shareholder Agreement</b> File: Magic Partnership LLC Subscription Agreement.pdf   Uploaded on October 14, 2024 @ 5:15 PM by Entity Admin   Due On: December 1, 2024 <span>Pending for Approval</span>
		<input type="checkbox"/> <b>Investor Slides</b> File: Document Pending Upload   Due On: December 1, 2024   <span>Overdue</span>
		<input type="checkbox"/> <b>Financial projections</b> File: Document Pending Upload   Due On: December 1, 2024   <span>Overdue</span>
		<input type="checkbox"/> <b>Invoice Paid</b> File: Document Pending Upload   Due On: December 31, 2024   <span>Overdue</span>

Messages (9)

7 Document(s) left

CIT Corporation Onboarding Documents: East Portland CIT

Status  1 Document(s) left

All	4	<input checked="" type="checkbox"/> <b>License Agreement between CIT Services LLC and CIT Corporation</b> File: Master Subscription Document.pdf   Uploaded on October 11, 2024 @ 4:34 PM by John Service   Approved on October 11, 2024 @ 4:38 PM by John Service <span>Complete</span>
Upload Pending	1	<input type="checkbox"/> <b>CIT Corporation Bylaws &amp; Articles of Incorporation</b> File: FormTest.pdf   Uploaded on October 17, 2024 @ 3:38 PM by John Service   Approved on November 5, 2024 @ 1:10 PM by John Service <span>Complete</span>
Pending Approval	0	<input type="checkbox"/> <b>DPLC Agreement between bank and Sponsor Organization</b> File: DPLC-Agreement-between-bank-and-Sponsor-Organization.pdf   Uploaded on January 8, 2025 @ 1:47 AM by Entity Admin   Expired: January 30, 2025   <span>Expired</span> <span>Pending for Approval</span>
Completed	3	<input type="checkbox"/> <b>Messages (12)</b>

Messages (12)

**CIT Corporation Bylaws & Articles of Incorporation**  
File: FormTest.pdf | Uploaded on October 17, 2024 @ 3:38 PM by John Service | Approved on November 5, 2024 @ 1:10 PM by John Service  
Complete

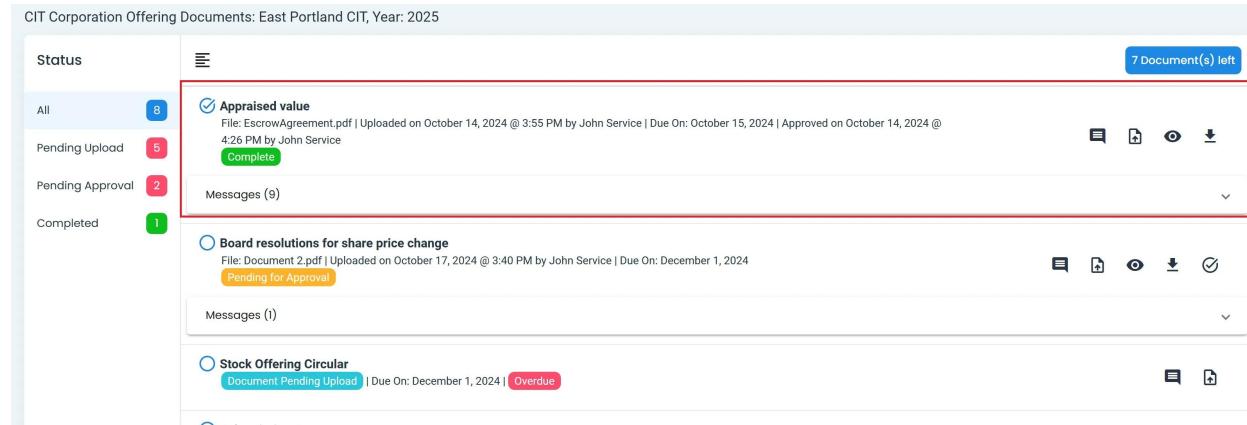
Messages (2)

**DPLC Agreement between bank and Sponsor Organization**  
File: DPLC-Agreement-between-bank-and-Sponsor-Organization.pdf | Uploaded on January 8, 2025 @ 1:47 AM by Entity Admin | Expired: January 30, 2025 | Expired  
Pending for Approval

Messages (2)

1 Document(s) left

### 2.6.5.1.2 View Details: Cards Explained



The screenshot shows a list of documents under the heading 'CIT Corporation Offering Documents: East Portland CIT, Year: 2025'. The list is organized by status: All (8), Pending Upload (3), Pending Approval (2), and Completed (1). Each document entry includes a status card with the following details:

- Appraised value**: File: EscrowAgreement.pdf | Uploaded on October 14, 2024 @ 3:55 PM by John Service | Due On: October 15, 2024 | Approved on October 14, 2024 @ 4:26 PM by John Service. Status: Complete.
- Board resolutions for share price change**: File: Document 2.pdf | Uploaded on October 17, 2024 @ 3:40 PM by John Service | Due On: December 1, 2024. Status: Pending for Approval.
- Stock Offering Circular**: Document Pending Upload | Due On: December 1, 2024 | Overdue.

Each card also includes a 'Messages' section and a set of actions (comment, download, etc.). A blue box highlights the 'Appraised value' card.

Each card will display information about a document, including:

- Option: File Name
- Option: File Type
- Option: Date and Option: Time Uploaded
- Option: Uploaded By
- Option: Status
- (If Applicable) Option: Approved By
- Option: Messages

### 2.6.5.2 Available Actions

Each Option: Status has its own set of available actions:

- All Status
- Upload Pending Status
- Pending Approval Status

## 2.7 Offering

The following Section: Sections are included in the account\_balanceAccount Category: Offering category:

- *Offerings*
- *Enrollments*

## 2.7.1 Offerings

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

### Table of Contents

- *Offerings*
  - *Location: Offerings*
  - *Table: Offerings List*
  - *Columns: Offerings List Table*

### 2.7.1.1 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. Action: Select the dropdown for the Navigation Category: Offering category.
3. Action: Select Section: Offerings from the dropdown.

### 2.7.1.2 Table: Offerings List

The Table: Offerings List table is what first appears on the homepage of the Section: Offerings section.

### 2.7.1.3 Columns: Offerings List Table

The Table: Offerings List table has the following Column: Columns:

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

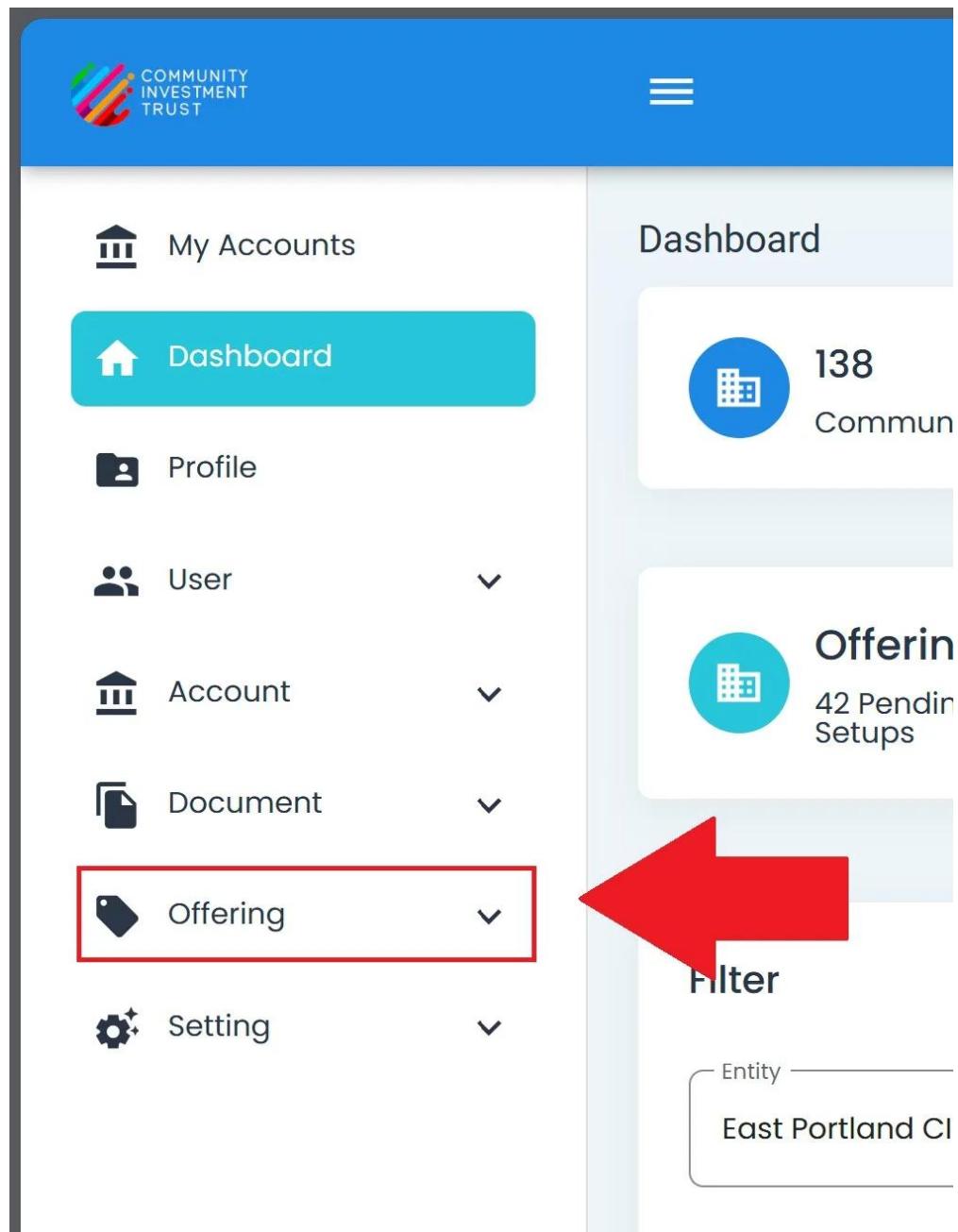


Fig. 50: Offering, Offerings Primary Sidenav Dropdown Location

Sponsor Organization	CIT Corporation	Year	Offering Name	
Community Investment Trust	East Portland CIT	2025	CIT OFFERING 2025	\$
Community Investment Trust	West Portland CIT	2025	fdgfdg 4353	\$
Community Investment Trust	East Portland CIT	2025	Tsg gagaffsafa	\$
Community Investment Trust	West Portland CIT	2025	dgsg sgasg ga	\$
Community Investment Trust	East Portland CIT	2024	EAST PORTLAND CIT CORP 2024	\$
Community Investment Trust	West Portland CIT	2024	WEST PORTLAND CIT CORP 2024	\$
Community	East Portland	2023	EAST PORTLAND	\$

Fig. 51: Offering, Offerings Homepage

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	

Fig. 52: Offering, Offerings Homepage, Offerings List table

Offering List										
Filter										
Sponsor Organization/CIT Corporation	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	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 gagafsofa	\$23.21	\$0.00	\$0.00	\$0.00	01/09/2025		
Community Investment Trust	West Portland CIT	2025	dgsg sgsg 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		

Fig. 53: Offering, Offerings Homepage, Offerings List table

## 2.7.2 Enrollments

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

### Contents

- *Enrollments*
  - *Enrollments Homepage Location*
  - *Related Sections*

### 2.7.2.1 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. Action: Select the dropdown for the Navigation Category: Offering category.
3. Action: Select Section: Enrollments from the dropdown.

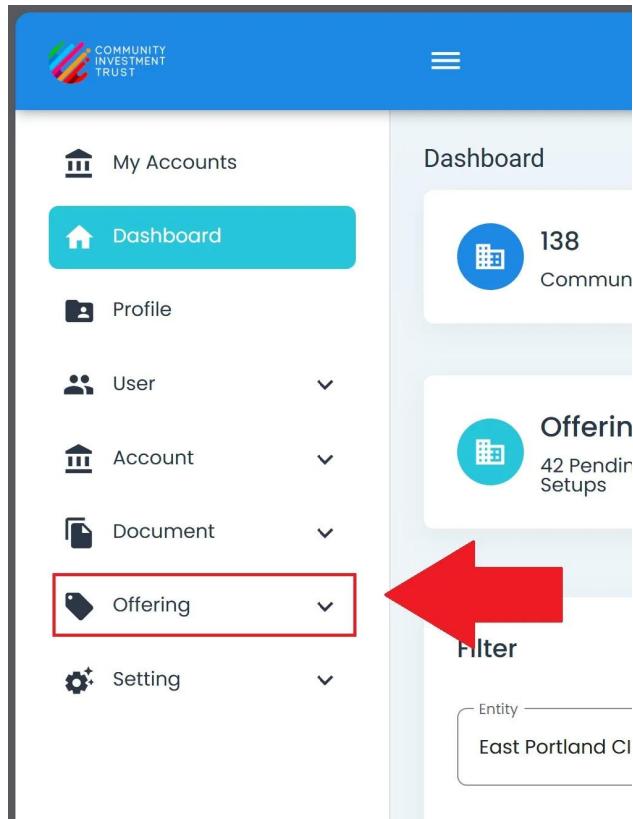


Fig. 54: Offering, Enrollments Primary Sidenav Location

Account ID	Investor	Monthly With
126	Thomas Thompson thomas.thompson@tolinvestcit.com	
150	Tom Cruise tomcruise@tol.com (503) 720-2853	1st for \$25.00
63	Travis Hanson travis.hanson@tolinvestcit.com	
185	Uy Test john232@transferonline.com (503) 720-2853	
186	uy test2 johnnt33@transferonline.com (503) 720-2853	
45	Valerie Carney valerie.carney@tolinvestcit.com	
99	William Cruz william.cruz@tolinvestcit.com	
57	William Miller william.miller@tolinvestcit.com	

Fig. 55: Offering, Enrollments Homepage

## 2.7.2.2 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 Table: Enrollments table.

### 2.7.2.2.1 Enrollments Table

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

**Contents**

- *Enrollments Table*
  - *Columns: Enrollments Table*
  - *Available Enrollment Statuses*

**Enrollments**

Filter

Sponsor Organization	Community Investment Trust	CIT Corporation	Offering
		East Portland CIT	CIT OFFERING 2025 (2025)

Q

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

Fig. 56: Offering, Enrollments, Enrollments Table, Columns Explained

### Columns: Enrollments Table

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

The Table: Enrollments table will have the following columns:

- Column: Account ID
- Column: Investor
- Column: Monthly Whiteboard
- Column: Heading for Whiteboard
- Column: A2P Processing
- Column: Avoiding Share Resource
- Column: Investment Amount
- Column: Shares

Enrollments								
Filter								
Sponsor Organization	CIT Corporation	Offering	Status					
Community Investment Trust	East Portland CIT	CIT OFFERING 2025 (2025)	All					
A								
53	Alex's Williams	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
39	Allison Anderson	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
125	Cole Hall	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
119	Chad Ballard	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
61	Elizabeth Marshall	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
60	Gary Palmer	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout
--	Jennifer Allen	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares	Initial Investment Cashout

Fig. 57: Offering, Enrollments, Enrollments Table, Columns

- Column: Hold Investment/Cashout
- Column: Status

### Available Enrollment Statuses

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

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

### Using Enrollments Filters

#### To Filter Enrollments:

1. Find the Item: Sponsor Organization dropdown.

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

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



Fig. 58: Offering, Enrollments, Sponsor Organization Filter Location

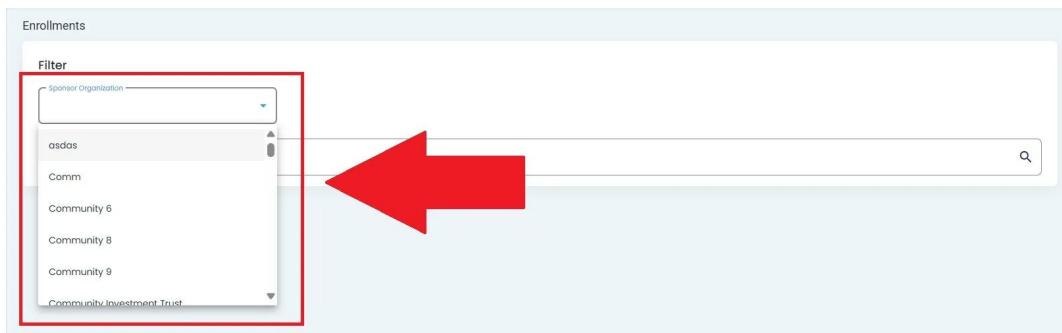


Fig. 59: Offering, Enrollments, Filter Dropdown Options

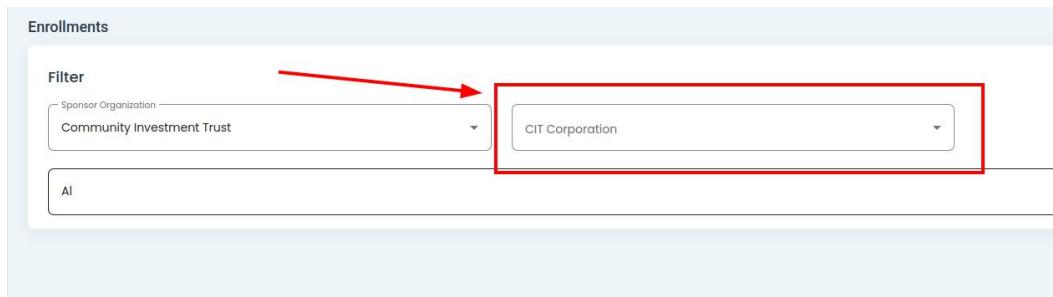


Fig. 60: Offering, Enrollments, Filter Selection Results With Two Dropdowns

### Note

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

### Warning: this feature is currently in development

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

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

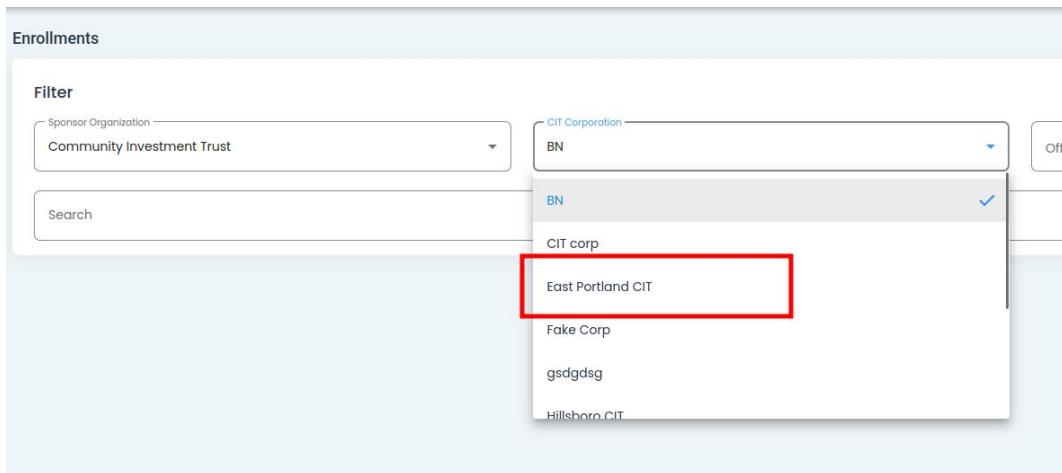


Fig. 61: Offering, Enrollments, CIT Corporation Filter Selection

### After selecting, the Item: Offering and Item: Status dropdowns will appear.

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

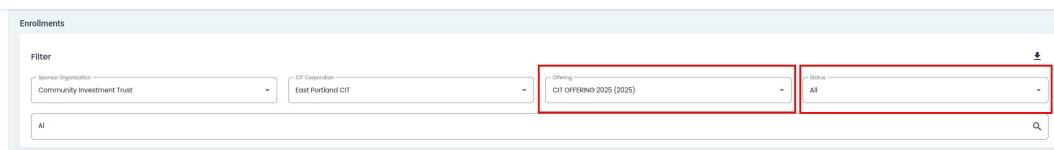


Fig. 62: Offering, Enrollments, Offering and Status Dropdowns Appear

#### 4. Select the Offering

1. Find and Action: Select the Item: Offering dropdown.

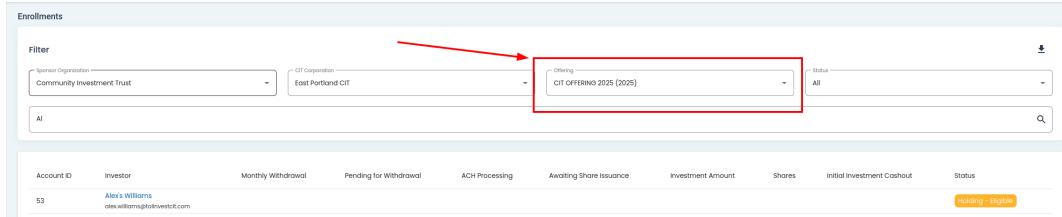


Fig. 63: Offering, Enrollments, Offering Dropdown Location

2. Action: Select an offering from the offering dropdown.



Fig. 64: Offering, Enrollments, Offering Dropdown Selection

#### 5. Select the Status

1. Find and Action: Select the Item: Status dropdown.
2. Action: Select a status from the status dropdown.

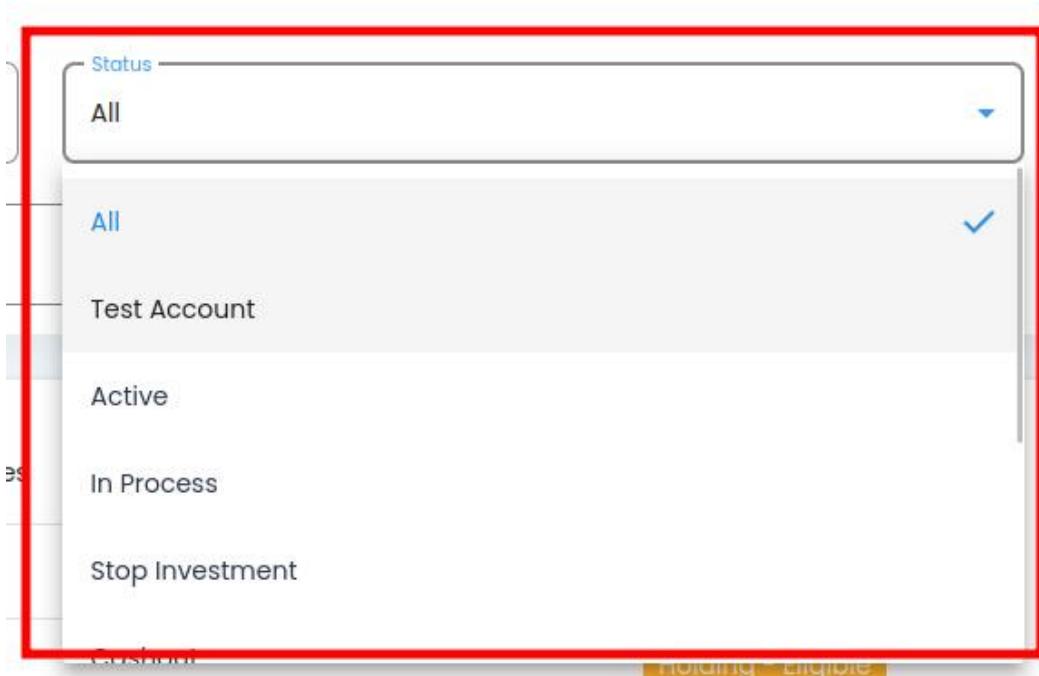


Fig. 65: Offering, Enrollments, Status Dropdown Location

Enrollments						
Filter						
Sponsor Organization	Investor	Monthly Withdrawal	Pending for Withdrawal	ACH Processing	Actions	Count
Community Investment Trust	Alex's Williams alex.williams@tolinvestcit.com					C
East Portland CIT	Allison Anderson allison.anderson@tolinvestcit.com					C
	Search					
53	Alex's Williams alex.williams@tolinvestcit.com					A1
39	Allison Anderson allison.anderson@tolinvestcit.com					A1
92	Amanda Castillo amanda.castillo@tolinvestcit.com					A1
51	Arthur Murphy arthur.murphy@tolinvestcit.com					A1
73	Austin Gilbert austin.gilbert@tolinvestcit.com					A1

Fig. 66: Offering, Enrollments, Search Bar Location

## Available Statuses

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

## Using Enrollments Search

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

### Using Filters for Enrollments Table

See [Using Enrollments Filters](#) for more information.

## Possible Search Options: Enrollemts Table

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

Enrollments							
Filter							
Sponsor Organization	CIT Corporation	Offering	Status				
Community Investment Trust	East Portland CIT	CIT OFFERING 2025 (2025)	All				
AI							
Account ID	Investor	Monthly Withdrawal	Pending for Withdrawal ↑	ACH Processing	Awaiting Share Issuance	Investment Amount	Shares
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						

Fig. 67: Offering, Enrollments, Search Column Highlighted

## How To: Search for Investors

### To Search for Investors:

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

Enrollments								
Filter								
Sponsor Organization	Community Investment Trust	CIT Corporation	East Portland CIT	Offering	CIT OFFERING 2025 (2025)	Status	All	
								
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@tolinwestcit.com							
39	Allison Anderson allison.anderson@tolinwestcit.com							
125	Caleb Hall caleb.hall@tolinwestcit.com							

Fig. 68: Offering, Enrollments, Search Bar Location

### Search Results Automatically Populate

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

Enrollments								
Filter								
Sponsor Organization	Community Investment Trust	CIT Corporation	East Portland CIT	Offering	CIT OFFERING 2025 (2025)	Status	All	
								
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@tolinwestcit.com							
39	Allison Anderson allison.anderson@tolinwestcit.com							
125	Caleb Hall caleb.hall@tolinwestcit.com							
119	Chad Ballard chad.ballard@tolinwestcit.com							
61	Elizabeth Marshall elizabeth_marshall@tolinwestcit.com							
50	Gary Palmer gary.palmer@tolinwestcit.com							
96	Jennifer Allen jennifer.allen@tolinwestcit.com							

Fig. 69: Offering, Enrollments, Search Example, Name in Field

3. Action: Click the Item: Investor to view their *Investor Details*.

## 2.8 Investment

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

### Contents

- *Investment*
  - *Investments Homepage Location*

- *Investments List Table Overview*
- *Using Investments Filters*

## 2.8.1 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 Navigation Category: Investment category.

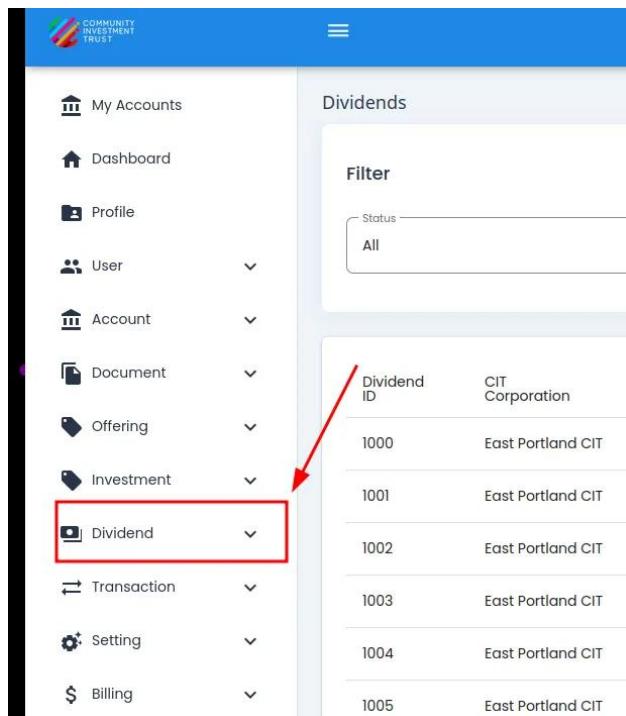


Fig. 70: Investment Category, Primary Sidenav Location

3. Select Section: Investments 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

Fig. 71: Investment, Investments, Primary Sidenav Location

## 2.8.2 Investments List Table Overview

The Table: Investments List table is what first appears on the homepage of the Section: Investments section.

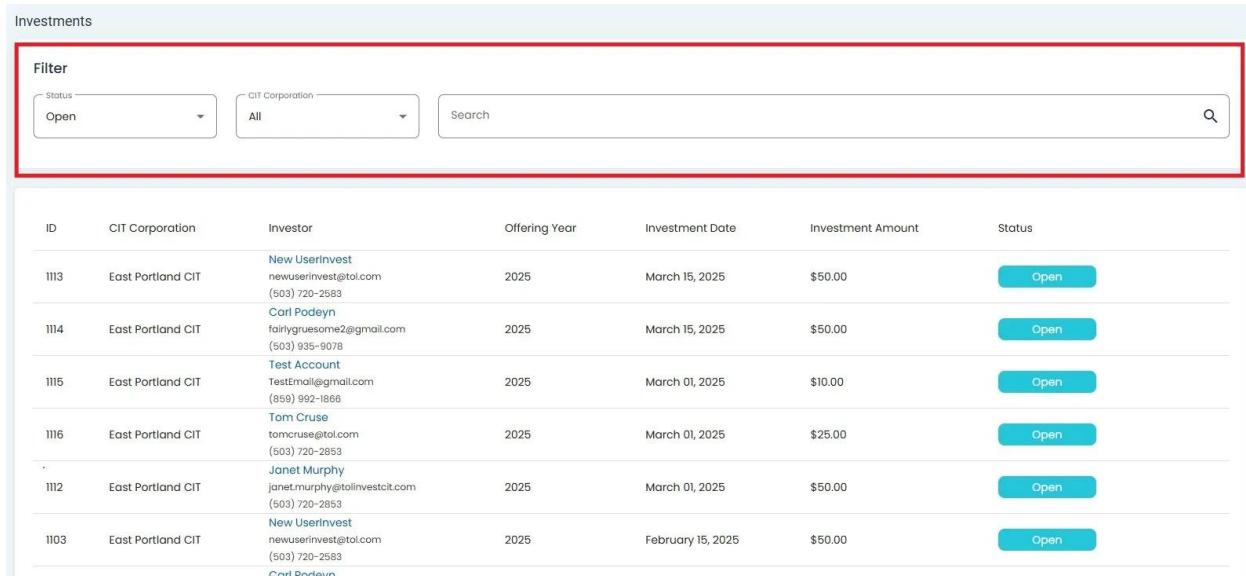
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status
New UserInvest						
1113	East Portland CIT	newuserinvest@tol.com (503) 720-2583	2025	March 15, 2025	\$50.00	<span>Open</span>
1114	East Portland CIT	Carl Podeyn fairlygruesome2@gmail.com (503) 935-9078	2025	March 15,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

Fig. 72: Investment, Investments List Table

## 2.8.3 Using Investments Filters

### To Filter Investments:

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

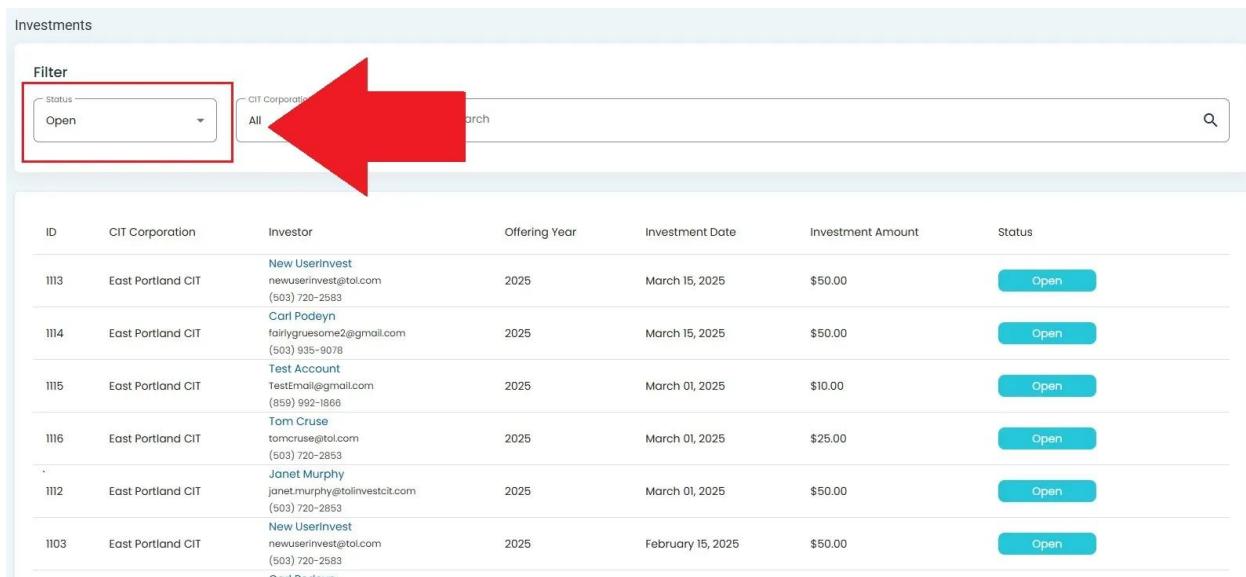


The screenshot shows a table titled 'Investments'. At the top, there is a 'Filter' section with three dropdowns: 'Status' (set to 'Open'), 'CIT Corporation' (set to 'All'), and a 'Search' input field. A red box highlights the 'Status' dropdown. Below the filter is a table with the following data:

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 Cruise tomcruise@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>
1113	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	<span>Open</span>
1114	East Portland CIT	Carl Podeyn				

Fig. 73: Investments Table Filter Section Highlighted

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



The screenshot shows the same 'Investments' table as Fig. 73. A large red arrow points from the text 'Click on the Status dropdown to filter by status.' to the 'Status' dropdown in the filter section. The filter section is identical to Fig. 73, with 'Status' set to 'Open', 'CIT Corporation' set to 'All', and a 'Search' input field.

Fig. 74: Investments Status Dropdown Location

The status dropdown will expand, showing available status options:

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

The dropdown will expand, showing available organization options:

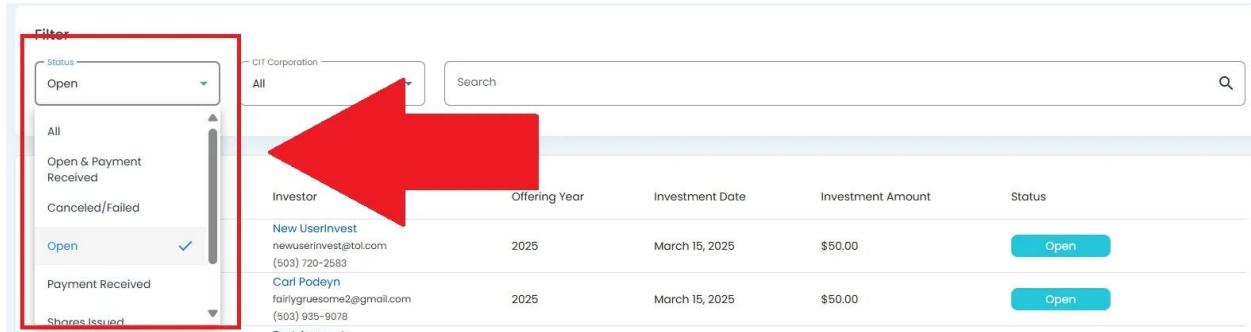


Fig. 75: Investments Status Dropdown Expanded

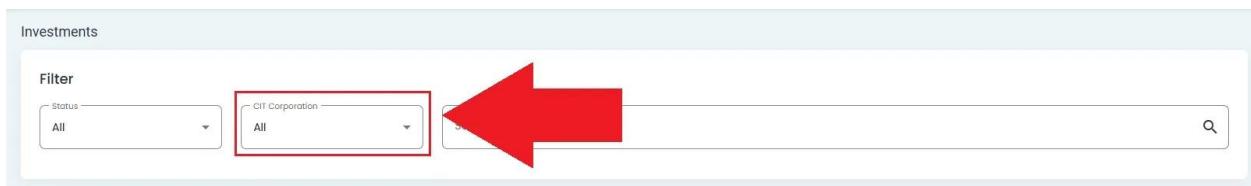


Fig. 76: CIT Corporation Dropdown Location



Fig. 77: CIT Corporation Dropdown Expanded

4. Click the search icon to apply filters.



Fig. 78: Search Icon Location

Your filtered results will appear:

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>
1103	East Portland CIT	New UserInvest newuserinvest@tol.com (503) 720-2583	2025	February 15, 2025	\$50.00	<span>Open</span>

Fig. 79: Search Results

### 2.8.3.1 Investments

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

#### Contents

- *Investments*

## 2.9 Dividend

The following Section: Sections are included in the Dividend category:

- *Dividends*
- *Cash Payouts*

### 2.9.1 Dividends

The Section: Dividends 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*

#### 2.9.1.1 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. Action: Select the dropdown for the Navigation Category: Dividend category.
3. Action: Select Section: Dividends from the dropdown.

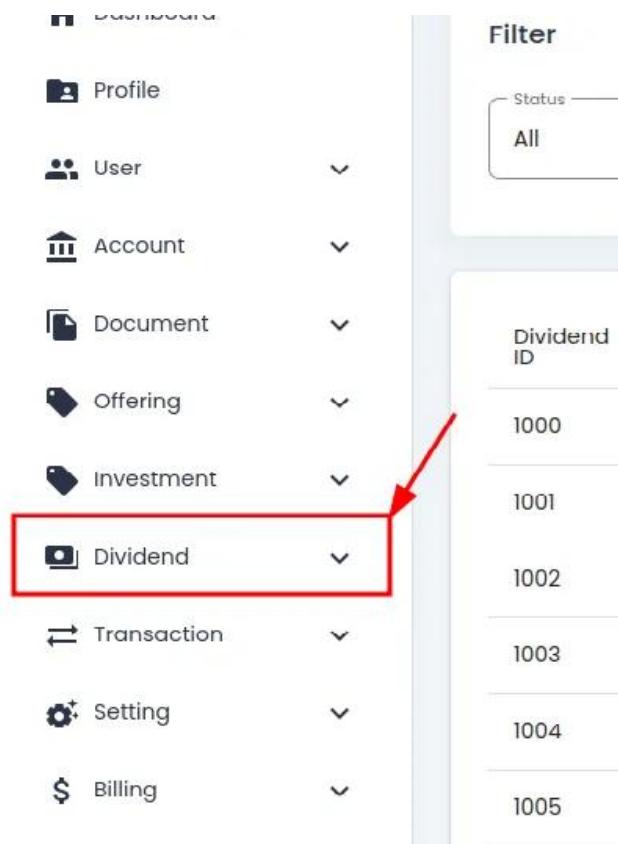


Fig. 80: Dividend Category, Primary Sidenav, Dropdown Location

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

 A red arrow points from the 'Dividends' link in the sidebar to the 'Dividends' link in the main content area."/>

Fig. 81: Dividend, Dividends Homepage, Primary Sidenav Location

### 2.9.1.2 Dividends List Table

The Table: Dividends List table is what first appears on the homepage of the Section: Dividends section.

### 2.9.1.3 Columns: Dividends List Table

The Table: Dividends List table has the following Column: Columns:

- Column: Dividend: The dividend identifier or name
- Column: CIT Corporation: The corporation associated with the dividend
- Column: Payable: The date when the dividend is payable
- Column: Record Date: The date of record for the dividend
- Column: Price Per Share: The amount paid per share
- Column: Total Shares: The total number of shares eligible for the dividend
- Column: Total Payout Amount: The total amount to be paid for all shares
- Column: Total Pending Payment Amount: The amount still pending payment
- Column: Number of Investors: The number of investors receiving the dividend
- Column: Status: The current status of the dividend (e.g., Complete)
- Column: Action: Available actions for the dividend




Dividends

Filter

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

Fig. 82: Dividends Homepage

#### 2.9.1.4 Using Dividends Filters

##### To Filter Dividends:

1. Locate the filter section above the table.




Dividends

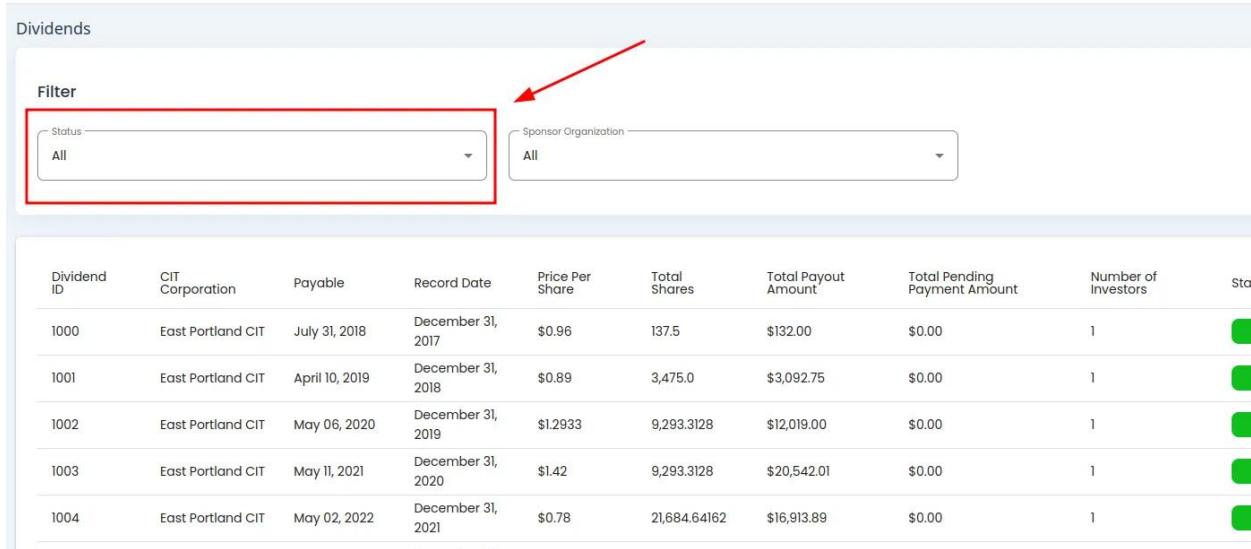
Filter

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	

Fig. 83: Dividends Table Filter Section Highlighted

### 2.9.1.5 How to: Filter by Status

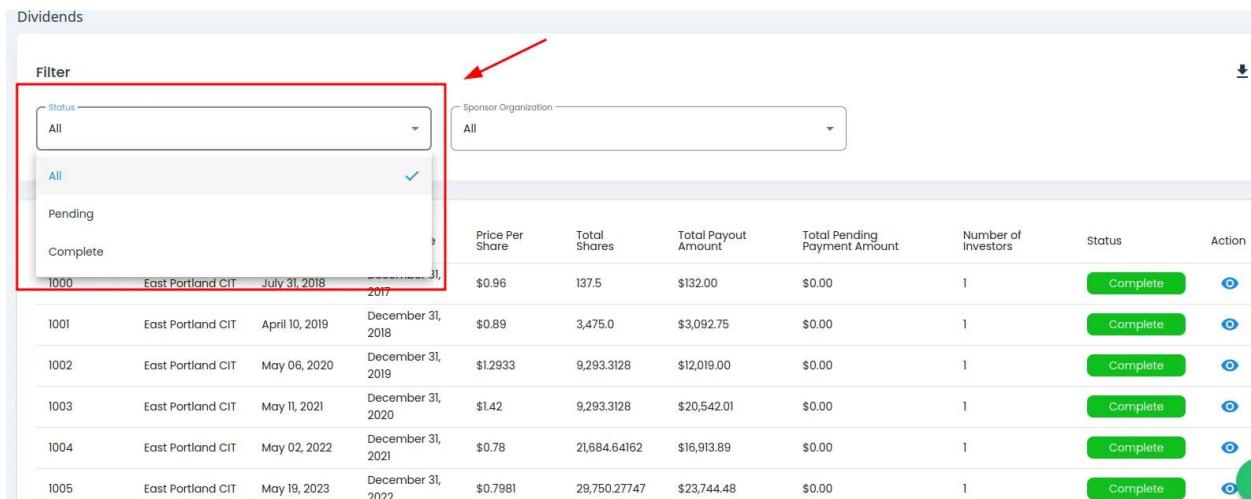
1. Find and Action: Click on the Item: Status dropdown located above the table.



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	<span>Green</span>
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	<span>Green</span>
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	<span>Green</span>
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	<span>Green</span>
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	<span>Green</span>

Fig. 84: Dividends, Status Dropdown Location

2. Action: Select the Item: Status you want to filter by from the dropdown.

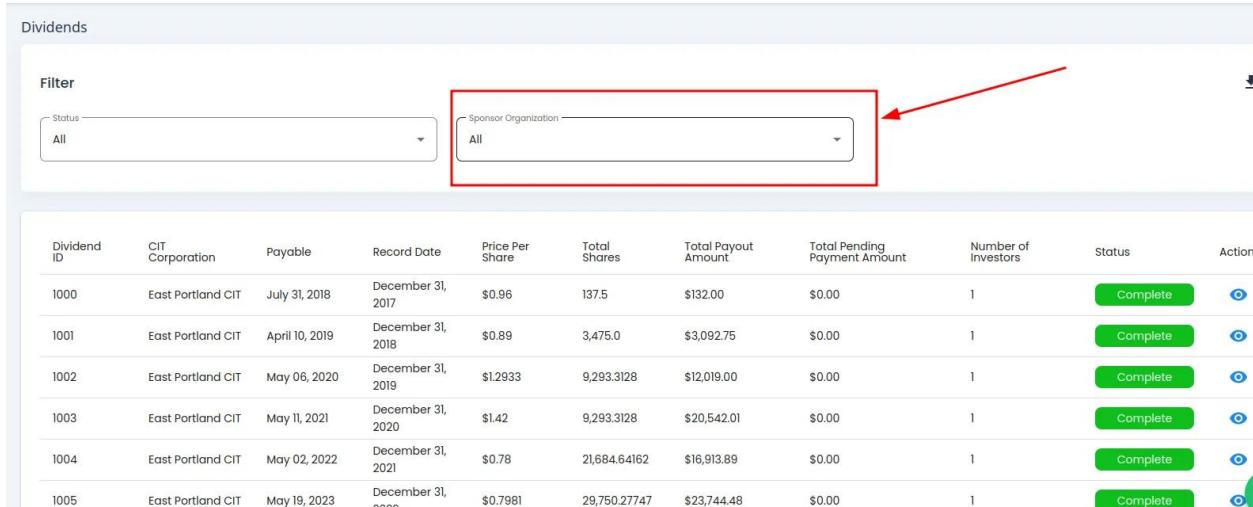


Dividend ID	CIT Corporation	Payable	Record Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Number of Investors	Status	Action
1000	East Portland CIT	July 31, 2018	December 31, 2017	\$0.96	137.5	\$132.00	\$0.00	1	<span>Complete</span>	
1001	East Portland CIT	April 10,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

Fig. 85: Dividends, Status Dropdown Expanded

### 2.9.1.6 How to: Filter by Sponsor Organization

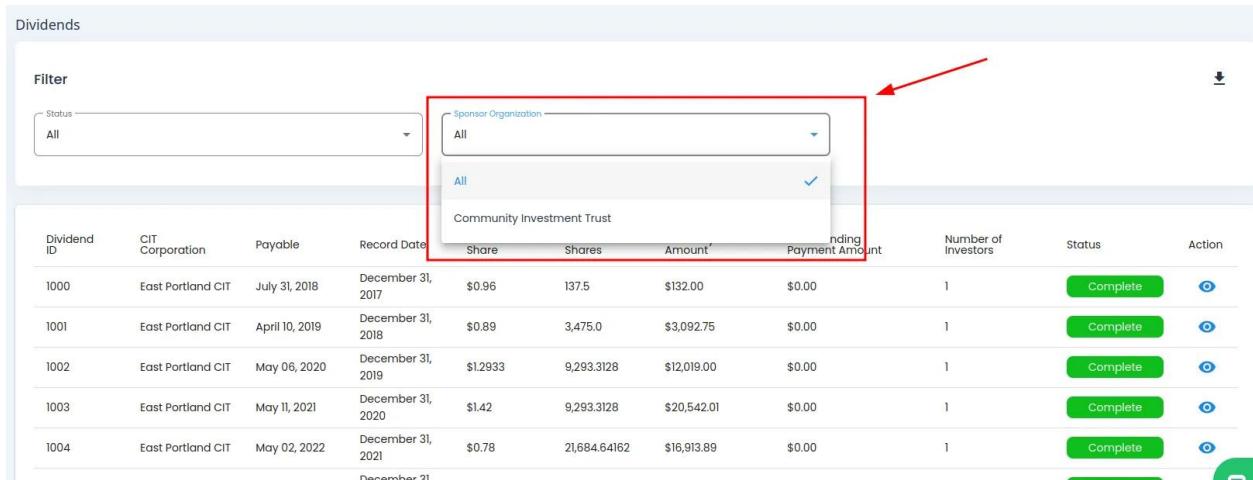
1. Find and Action: Click on the Item: Sponsor Organization dropdown.



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	

Fig. 86: Sponsor Organization Dropdown Location

2. Action: Select the Item: Sponsor Organization you want to filter by from the dropdown.



Dividend ID	CIT Corporation	Payable	Record Date	Share	Shares	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	

Fig. 87: Sponsor Organization Dropdown Expanded

### 2.9.1.7 How to: Filter by CIT Corporation

#### CIT Corporation Filter Availability

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

1. Find and Action: Click on the Item: CIT Corporation dropdown.
2. Action: Select the Item: CIT Corporation you want to filter by from the 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	<input type="radio"/>
1001	East Portland CIT	April 10, 2019	December 31, 2018	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	<input type="radio"/>
1002	East Portland CIT	May 06, 2020	December 31, 2019	\$1.2933	9,293.3128	\$12,019.00	\$0.00	1	Complete	<input type="radio"/>
1003	East Portland CIT	May 11, 2021	December 31, 2020	\$1.42	9,293.3128	\$20,542.01	\$0.00	1	Complete	<input type="radio"/>
1004	East Portland CIT	May 02, 2022	December 31, 2021	\$0.78	21,684.64162	\$16,913.89	\$0.00	1	Complete	<input type="radio"/>

Fig. 88: CIT Corporation Dropdown Location

Sponsor Organization: Community Investment Trust

CIT Corporation: East Portland CIT

All

East Portland CIT

Date	Price Per Share	Total Shares	Total Payout Amount	Total Pending Payment Amount	Investors	Status	Action
July 31, 2018	\$0.96	137.5	\$132.00	\$0.00	1	Complete	<input type="radio"/>
April 10, 2019	\$0.89	3,475.0	\$3,092.75	\$0.00	1	Complete	<input type="radio"/>

Fig. 89: CIT Corporation Dropdown Expanded

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

## 2.9.2 Cash Payouts

The Section: 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*

### 2.9.2.1 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 Navigation Category: Dividend category.
3. Select Section: Cash Payouts from the dropdown.

### 2.9.2.2 Cash Payouts List Table

The Table: Cash Payouts List table is what first appears on the homepage of the Section: Cash Payouts section.

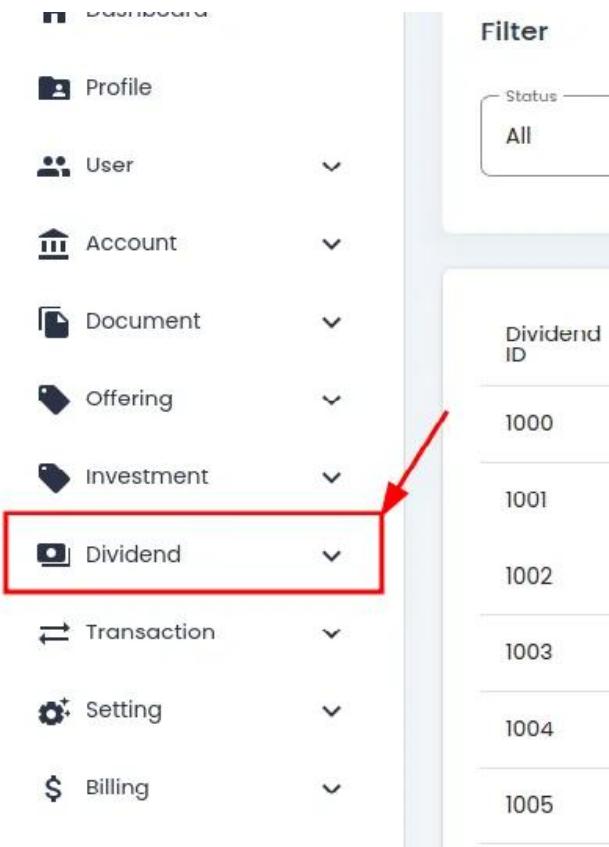


Fig. 90: Dividend Category, Primary Sidenav, Dropdown Location

ID	Dividend ID	CIT Corporation	Investor
1	1000	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
2	1001	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
3	1002	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
4	1003	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853
5	1004	East Portland CIT	Janet Murphy janet.murphy@ (503) 720-2853

Fig. 91: Cash Payouts Homepage

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

Fig. 92: Cash Payouts List Table

### 2.9.2.3 Columns: Cash Payouts List Table

The Table: Dividend Cash Payouts table has the following Column: Columns:

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

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

1. Find the Column: Investor column in the Table: Dividend Cash Payouts table.
2. Click on the Item: Investor you wish to view details for.

**Action Complete: You will be redirected to the Investor Details page.**

You will be *redirected to the Investor Details page* once you click an Item: Investor's Name.

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	Payable	July 31, 2018	\$95.00	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	April 10, 2019	\$65.00	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 06, 2020	\$140.00	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 11, 2021	\$56.00	ACH

Fig. 93: Dividend, Cash Payouts, Investor Column

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	Payable	July 31, 2018	\$95.00	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	April 10, 2019	\$65.00	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 06, 2020	\$140.00	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcit.com (503) 720-2853	Payable	May 11, 2021	\$56.00	ACH

Fig. 94: Dividend, Cash Payouts, Investor Select Example

### 2.9.2.5 Using Cash Payouts Filters

#### To Filter Cash Payouts:

1. Locate the filter section above the table.

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

Fig. 95: Dividend, Cash Payouts, Filter Location

### 2.9.2.6 How to: Filter by Status

1. Find and Action: Click on the Item: Status dropdown, located above the Table: Cash Payouts List table.

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

Fig. 96: Cash Payouts, Status Dropdown, Location

2. Action: Select the Item: Status you want to filter by from the dropdown.

Dividend Cash Payouts							
Filter							
Status		Sponsor Organization		List of Payouts			
Status		Sponsor Organization		List of Payouts			
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

Fig. 97: Cash Payouts, Status Dropdown, Expanded

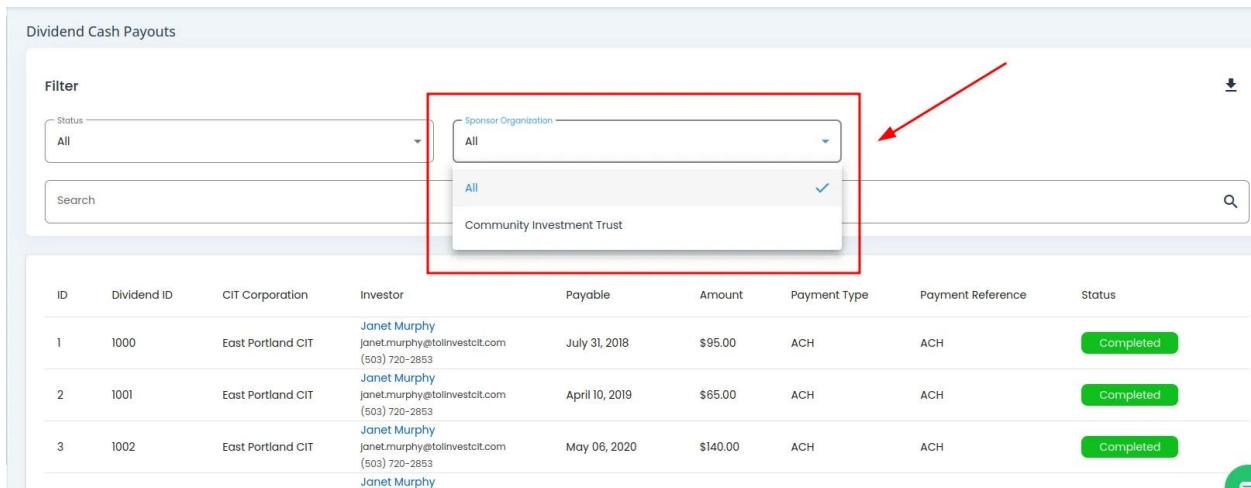
### 2.9.2.7 How to: Filter by Sponsor Organization

1. Find and Action: Click on the Item: Sponsor Organization dropdown.

Dividend Cash Payouts							
Filter							
Status		Sponsor Organization		List of Payouts			
Status		Sponsor Organization		List of Payouts			
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

Fig. 98: Cash Payouts, Sponsor Organization Dropdown, Location

2. Action: Select the Item: Sponsor Organization you want to filter by from the dropdown.



Dividend Cash Payouts

Filter

Status: All

Sponsor Organization: All

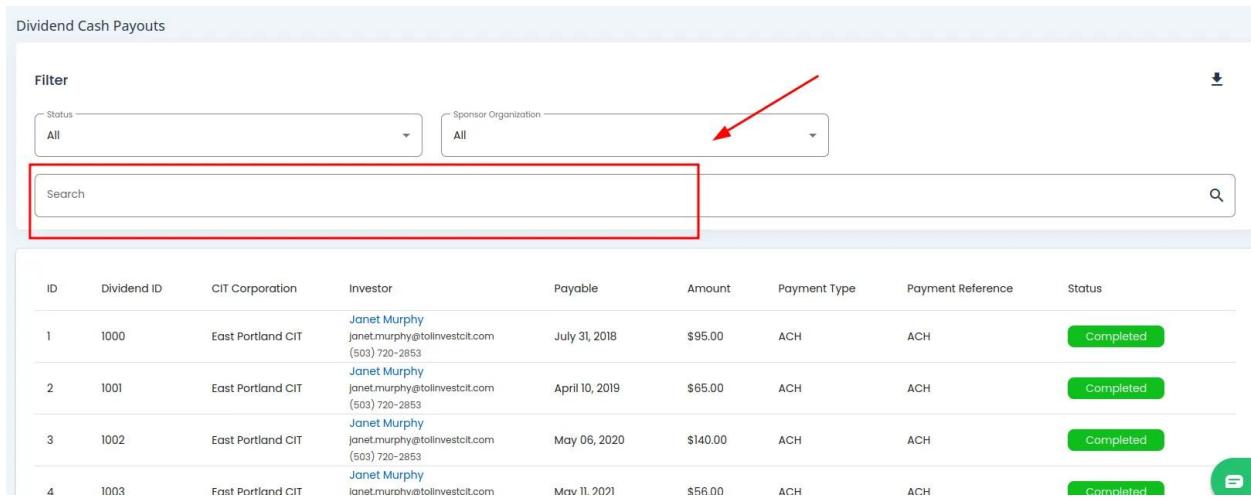
Search:

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
			Janet Murphy					

Fig. 99: Cash Payouts, Sponsor Organization Dropdown, Expanded

### 2.9.2.8 How to: Search for Cash Payout Information

1. Find and Action: Click on the Item: 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

Fig. 100: Cash Payouts, Search Bar, Location

2. Action: Type in the **Name of the Investor** you want to see Option: Cash Payouts for.

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

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

Dividend Cash Payouts							
Filter			Sponsor Organization				
ID	Dividend ID	CIT Corporation	Investor	Payoutable	Amount	Payment Type	Payment Reference
1	1000	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	July 31, 2018	\$95.00	ACH	ACH
2	1001	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	April 10, 2019	\$65.00	ACH	ACH
3	1002	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 08, 2020	\$140.00	ACH	ACH
4	1003	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 11, 2021	\$56.00	ACH	ACH
5	1004	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 02, 2022	\$76.00	ACH	ACH
6	1005	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 19, 2023	\$80.00	ACH	ACH
7	1006	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	May 17, 2024	\$25.00	ACH	ACH
12	1007	East Portland CIT	Janet Murphy janet.murphy@tolinvestcitz.com (503) 720-2853	February 28, 2025	\$0.84	ACH	ACH

Fig. 101: Cash Payouts, Search Bar, Search Example

## 2.9.2.9 How To: View More Information

1. Action: Click on the name of the Item: Investor you want to view more information for.

Investments							
Filter			CIT Corporation				
ID	CIT Corporation	Investor	Offering Year	Investment Date	Investment Amount	Status	
1113	East Portland CIT	NewUserInvest newuserinvest@tot.com (503) 720-2853	2025	March 15, 2025	\$50.00	Open	
1114	East Portland CIT	Test Account TestInvest@gmail.com (503) 720-2853	2025	March 15, 2025	\$50.00	Open	
1115	East Portland CIT	Tom Cruise tomcruise@tot.com (503) 720-2853	2025	March 01, 2025	\$10.00	Open	
1116	East Portland CIT	Tom Cruise tomcruise@tot.com (503) 720-2853	2025	March 01, 2025	\$25.00	Open	
1112	East Portland CIT		2025	March 01, 2025	\$50.00	Open	
1113	East Portland CIT		2025	February 15, 2025	\$50.00	Open	
1114	East Portland CIT		2025	February 15, 2025	\$50.00	Open	
1089	East Portland CIT		2024	July 15, 2024	\$10.00	Open (Payment Processing)	
1022	East Portland CIT		2024	July 15, 2024	\$100.00	Open (Payment Processing)	
1053	East Portland CIT		2024	July 15, 2024	\$50.00	Open (Payment Processing)	

Fig. 102: Cash Payouts, Investor Click

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

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

## 2.10 Transaction

The following Section: Sections can be found in the Transaction category:

- *Directives*
- *Complete Transactions*

### 2.10.1 Directives

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

- *Directives Homepage Location*
- *Directives List Table Overview*
- *Filtering the Directives List*

#### 2.10.1.1 Directives Homepage Location

To Find the Directives List Homepage:

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

##### Don't see the sidenav?

See How to Toggle Primary Sidebar for more information.

2. Select the dropdown for the Navigation Category: Transaction category.
3. Select Section: Directives from the dropdown.

#### 2.10.1.2 Directives List Table Overview

The Table: Directives List table has the following Column: Columns:

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

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	Jan 2025
1013	East Portland CIT	Jan 2025
1012	East Portland CIT	Jan 2025
1010	East Portland CIT	Jan 2025
1011	East Portland CIT	Jan 2025

Fig. 103: Directives Homepage

Directives									
Filter									
Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
I014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
I013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
I012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
I010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
I011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Fig. 104: Directives List Table showing transaction directives with status indicators

### 2.10.1.3 Filtering the Directives List

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

- *Status*
- *Sponsor Organization*

#### 2.10.1.3.1 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																																																																					
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Items per page: 10 1 - 5 of 5 < >																																																																					

Fig. 105: Directives Table Filter Section with Status and Sponsor Organization filters

## Status Filter Dropdown

1. Find and Click on the Option: Status dropdown to filter by status.

Directives																																																																					
Filter																																																																					
Status																																																																					
All																																																																					
Sponsor Organization																																																																					
All																																																																					
Search Transaction ID																																																																					
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Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action																																																												
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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 < >																																																																					

Fig. 106: Status dropdown in the Directives filter section

2. Select from available status options:

Directives						
Filter						
Status		Sponsor Organization				
All		All				
All						
Pending						
Complete						
Rejected/Canceled						
Investment		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

Fig. 107: Status dropdown expanded showing All, Pending, Complete, and Rejected/Canceled options

### Sponsor Organization Filter Dropdown

1. Option: Find and Option: Click on the Item: Sponsor Organization dropdown to filter by organization.

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	

Fig. 108: Sponsor Organization dropdown in the filter section

2. Select from available organization options:

### How to Search for Directives

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

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

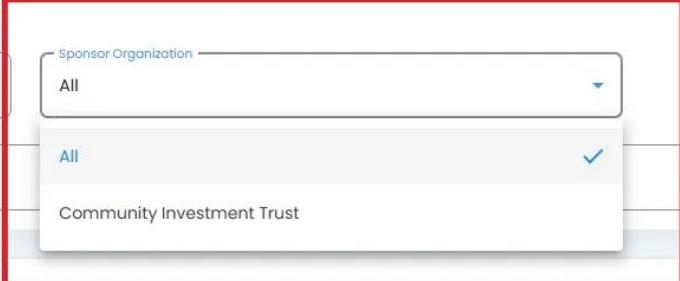
### How to Use Wildcard (\*) to Search for Multiple Transaction IDs

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

#### 2.10.1.3.2 Viewing Directive Details

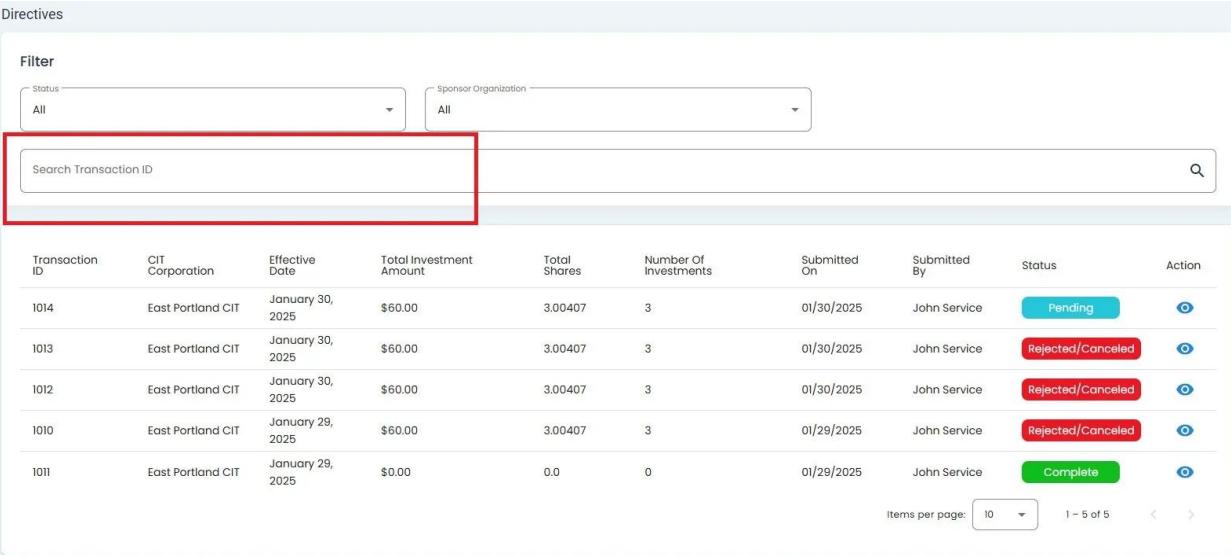
To view detailed information about a directive:

1. Locate the eye icon in the Action column for the directive you wish to view.
2. Click the eye icon to open the Directive Details screen.



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

Fig. 109: Sponsor Organization dropdown expanded showing All and Community Investment Trust options



Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Pending	○
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	○
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Canceled	○
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service	Rejected/Canceled	○
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service	Complete	○

Fig. 110: Search Bar for Transaction ID

Directives

Filter

Status	All	Sponsor Organization	All
<input type="text" value="1013"/> 			

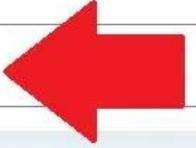
Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Submitted By	Status	Action
1013	CIT Corporation	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service	Rejected/Cancelled	

Items per page: 10  1 - 1 of 1  

Fig. 111: Search Bar for Transaction ID with search results

Directives

Filter

Status	All	Sponsor Organization	All
<input type="text" value="101*"/> 			

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

Fig. 112: Search Bar for Transaction ID with wildcard search

Directives

Filter

Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Number Of Investments	Submitted On	Action
1014	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	 <span>Rejected/Cancelled</span>
1013	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service  <span>Rejected/Cancelled</span>
1012	East Portland CIT	January 30, 2025	\$60.00	3.00407	3	01/30/2025	John Service  <span>Rejected/Cancelled</span>
1010	East Portland CIT	January 29, 2025	\$60.00	3.00407	3	01/29/2025	John Service  <span>Rejected/Cancelled</span>
1011	East Portland CIT	January 29, 2025	\$0.00	0.0	0	01/29/2025	John Service  <span>Complete</span>

Items per page: 10 1 - 5 of 5




Fig. 113: Eye icon in the Action column for viewing directive details

Directives

Filter

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

Items per page: 10 1 - 5 of 5




Fig. 114: 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

## **2.10.2 Complete Transactions**

The Section: 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*

### 2.10.2.1 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 Navigation Category: Transaction category.
3. Select Section: Complete Transactions from the dropdown.

Complete Transactions									
Filter									
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	

Fig. 115: Complete Transactions Homepage

### 2.10.2.2 Complete Transactions List Table

The Table: Complete Transactions List table is what first appears on the homepage of the Section: Complete Transactions section.

Complete Transactions									
Filter									
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	

Fig. 116: Complete Transactions List Table

### 2.10.2.3 Columns: Complete Transactions List Table

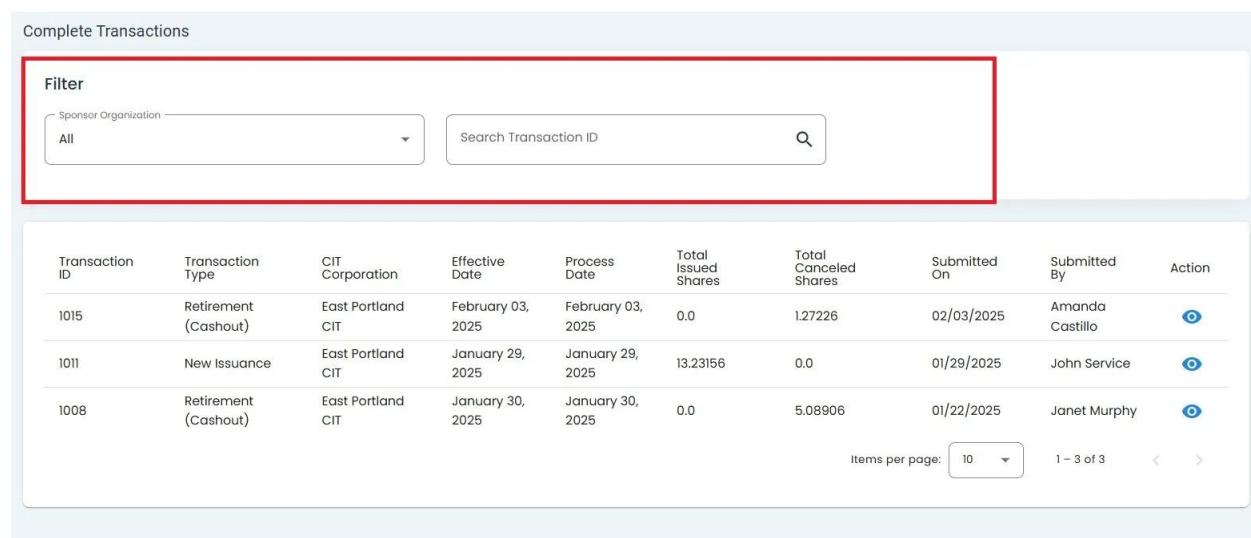
The Table: Complete Transactions List table has the following Column: Columns:

- Column: Transaction ID: The unique identifier for the transaction
- Column: Date: The date when the transaction occurred
- Column: Investor: The investor associated with the transaction
- Column: Organization: The organization associated with the transaction
- Column: Amount: The amount of the transaction
- Column: Transaction Type: The type of transaction
- Column: Status: The current status of the transaction
- Column: Action: Available actions for the transaction

### 2.10.2.4 Using Complete Transactions Filters

#### To Filter Complete Transactions:

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



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	

Fig. 117: Complete Transactions Table Filter Section Highlighted

2. Click on the Sponsor Organization dropdown to filter by organization.
3. Select the Sponsor Organization you wish to see the transactions for.
4. Select the Item: Search Transaction ID field.

Filter

Sponsor Organization  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	<input type="button" value=""/>
1011	New Issuance	East Portland CIT	January 29, 2025	January 29, 2025	13.23156	0.0	01/29/2025	John Service	<input type="button" value=""/>
1008	Retirement (Cashout)	East Portland CIT	January 30, 2025	January 30, 2025	0.0	5.08906	01/22/2025	Janet Murphy	<input type="button" value=""/>

Items per page:  0 of 0 < >

Fig. 118: Complete Transactions Status Dropdown Location

Complete Transactions

Filter

Sponsor Organization  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

Fig. 119: Sponsor Organization, Dropdown Expanded

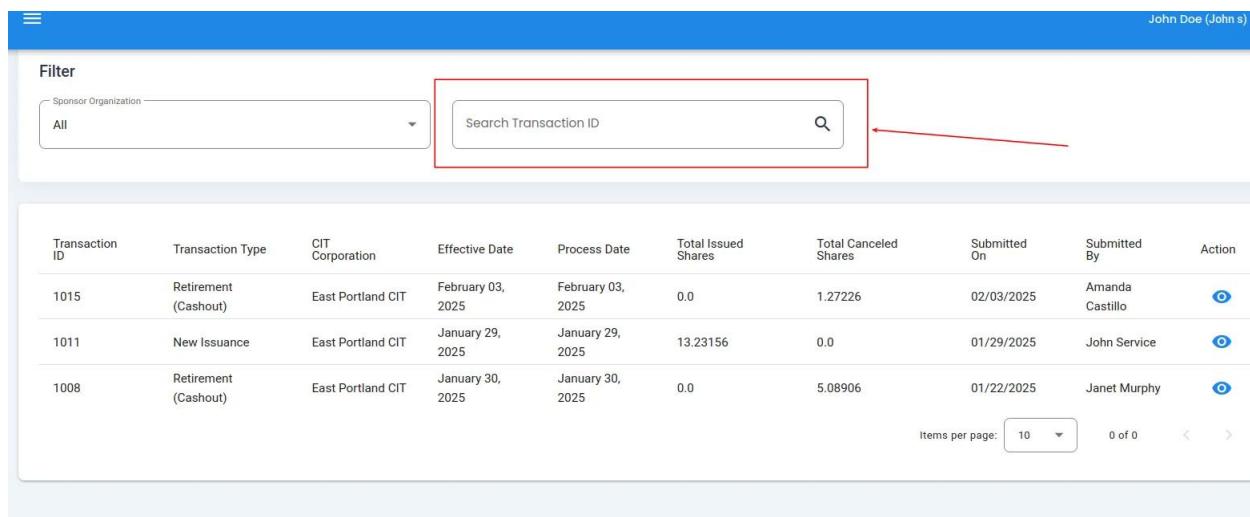


Fig. 120: Search Transaction ID Field Location

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

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

## 2.11 Settings

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

- Receive Notifications

## 2.12 Billing

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

- *Invoices*
- *Payments*
- *Statement*
- *Payment Management*

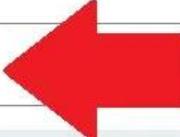
Directives

Filter

Status: All

Sponsor Organization: All

101\*



Transaction ID	CIT Corporation	Effective Date	Total Investment Amount	Total Shares	Nur Inve
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

Fig. 121: Search Bar for Transaction ID with wildcard search

### 2.12.1 Invoices

The Section: 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 of staff contacts with columns for Contact Name, Contact Email, Number of Visits, Last Logged In, Status, and Action. A tooltip for 'Hover for Page Preview' is shown at the bottom of the page, pointing to a green bar that says 'Need help finding the Staff Homepage? See [Staff Homepage Location](#) for more information.'

Contact Name	Contact Email	Number of Visits	Last Logged In	Status	Action
Annes Zolgeri	unesa@transferonline.com	1	10/30/2024 @ 12:46 PM	Active	
Carl Podeyn	cpooley@transferonline.com	7	12/19/2024 @ 10:47 AM	Active	
John Doe	dlevey@transferonline.com	60	01/06/2025 @ 06:01 AM	Active	
John Service	cjt@transferonline.com	304	12/29/2024 @ 01:49 PM	Active	
John Vo	jphn@transferonline.com	824	01/06/2025 @ 04:53 AM	Active	
Mohd. Shoaib	mohd.shoaib@techahedcorp.com	268	01/06/2025 @ 05:19 AM	Active	
Pankaj OIT	pankaj.joshi@techahedcorp.com	0		<span>Activation Pending</span>	

Staff Homepage #

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

💡 Hover for Page Preview

Click to show ▾

#### 2.12.1.1 Invoices Homepage

The Section: Invoices section opens up to the Table: 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	\$159	\$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	

Fig. 122: Billing, Invoices, Homepage

### 2.12.1.2 Columns: Invoices List Table

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

- Column: Invoice Number
- Column: Bill To
- Column: Type
- Column: Invoice Date
- Column: Amount
- Column: Status
- Column: Action

### 2.12.1.3 How to Download Invoices in PDF

To download invoices in PDF format:

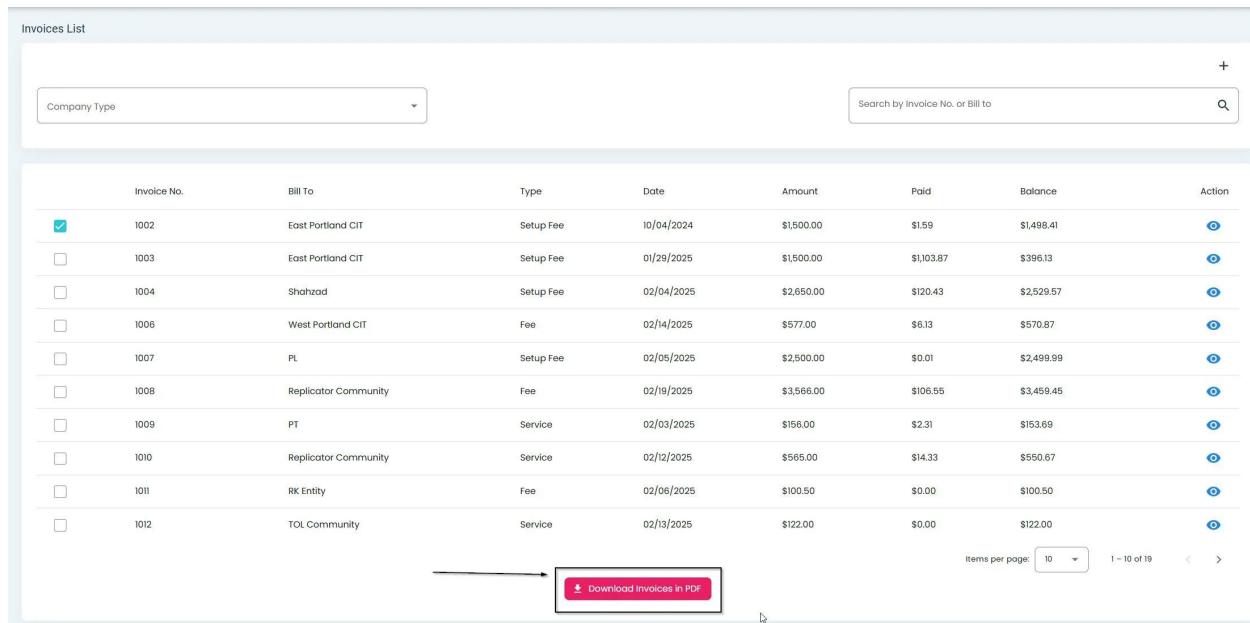
1. Select the checkboxes next to the invoices you want to download:
2. Click the Item: Download Invoices in PDF button:

Invoices List							
Company Type		Search by Invoice No. or Bill to					
Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
<input 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	\$1,03.87	\$398.13	
<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	

Fig. 123: Billing, Invoices, Columns Explained

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	\$1,03.87	\$398.13	
<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	

Fig. 124: Billing, Invoices, Selecting Invoices



Invoice No.	Bill To	Type	Date	Amount	Paid	Balance	Action
I002	East Portland CIT	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41	
I003	East Portland CIT	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13	
I004	Shahzad	Setup Fee	02/04/2025	\$2,650.00	\$120.43	\$2,529.57	
I006	West Portland CIT	Fee	02/14/2025	\$577.00	\$6.13	\$570.87	
I007	PL	Setup Fee	02/05/2025	\$2,500.00	\$0.01	\$2,499.99	
I008	Replicator Community	Fee	02/19/2025	\$3,566.00	\$106.55	\$3,459.45	
I009	PT	Service	02/03/2025	\$156.00	\$2.31	\$153.69	
I010	Replicator Community	Service	02/02/2025	\$566.00	\$14.33	\$550.67	
I011	RK Entity	Fee	02/06/2025	\$100.50	\$0.00	\$100.50	
I012	TOL Community	Service	02/13/2025	\$122.00	\$0.00	\$122.00	

Fig. 125: Billing, Invoices, Download PDF Button

#### 2.12.1.4 How to Add an Invoice

To add a new invoice:

1. Click the Item: Add New Invoice button (plus sign):
2. Fill out the invoice form:

##### Note

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

3. Complete all required information (example):

#### 2.12.1.5 How to Add New Line Items

You can add multiple line items to an invoice:

1. Click the Item: Add Line Item button:
2. Fill out the details for the new line item:
3. The total will automatically update to reflect all line items:

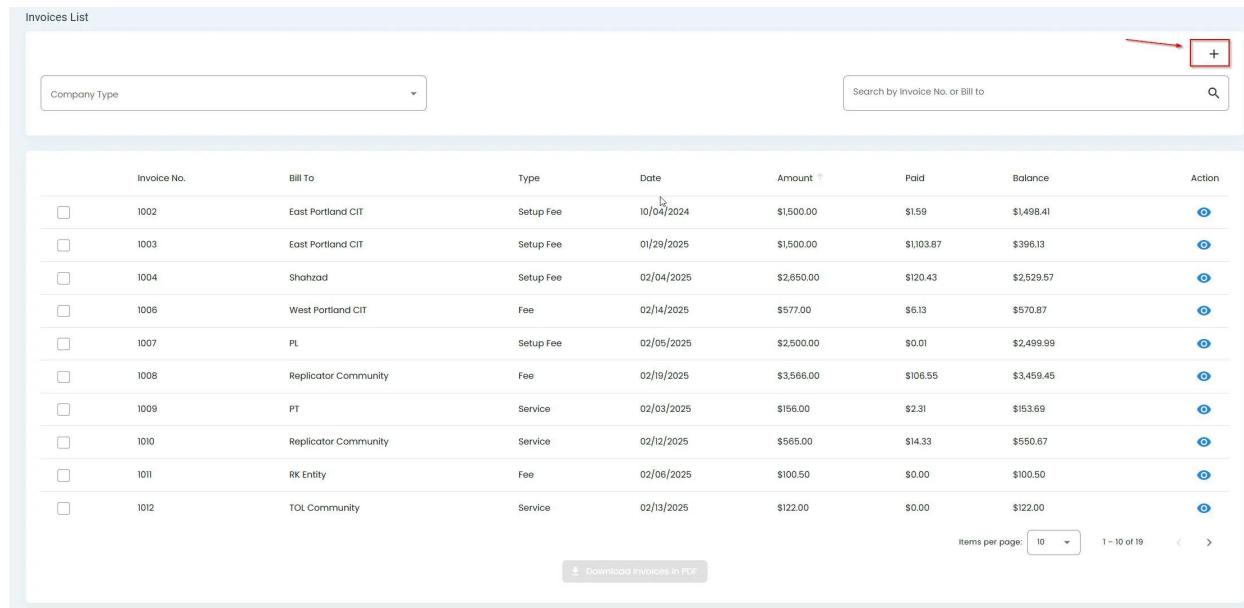


Fig. 126: Billing, Invoices, Add New Invoice Button

Company Type*	Date*				
Invoice Type*	Note to Biller*				
Internal Note*					
<b>Line Items</b> <table border="1"> <tr> <td>1</td> <td>Item Type*</td> <td>Description*</td> <td>Amount*</td> </tr> </table>		1	Item Type*	Description*	Amount*
1	Item Type*	Description*	Amount*		
Total amount \$0.00					

Fig. 127: Billing, Invoices, Add Invoice Form

Company Type*	Date*				
Invoice Type*	Note to Biller*				
Internal Note*					
<b>Line Items</b> <table border="1"> <tr> <td>1</td> <td>Item Type*</td> <td>Description*</td> <td>Amount*</td> </tr> </table>		1	Item Type*	Description*	Amount*
1	Item Type*	Description*	Amount*		
Total amount \$0.00					

Fig. 128: Billing, Invoices, All Fields Required

The screenshot shows the 'Add Invoice' form with the following fields filled out:

- Company Type: Sponsor Organizations
- Date: 3/13/2025
- Company Accounts: Community Investment Trust
- 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
Post	Part of the 2025 Community Engagement budget. Approved by Jane Doe on 3/10/2025	\$500
- Total amount: \$500.00
- Save Changes button

Fig. 129: Billing, Invoices, Example of Filled Out Form

The screenshot shows the 'Add Invoice' form with the same data as Fig. 129, but with a red box highlighting the '+ Add Line Item' button located to the right of the existing line item table.

Fig. 130: Billing, Invoices, Add Line Item Button

The screenshot shows the 'Add Invoice' form with two line items added:

Line Item	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 button

Fig. 131: Billing, Invoices, Second Line Item Added

Fig. 132: Billing, Invoices, Total Updated with New Line Item

### 2.12.2 Payments

The Section: 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*

#### 2.12.2.1 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

### 2.12.2.2 Layout: Payments Homepage

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

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur1	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	l2033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	l2443	\$220.00	\$4.32	\$215.68	
5	02/19/2025	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	l234	\$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	zxdur1	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Fig. 133: Payments Homepage showing the payment records table

### 2.12.2.3 Filtering Payments

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

#### 2.12.2.3.1 Step 1: Locate the Filter Button

Find the filter button in the Payments table interface.

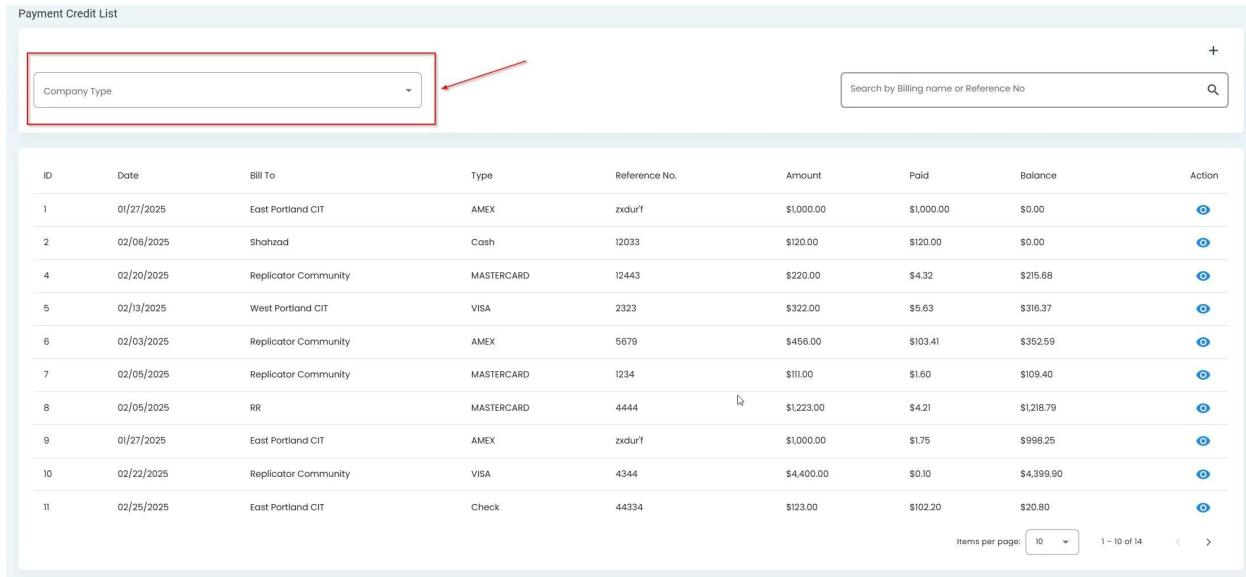
#### 2.12.2.3.2 Step 2: Select Filter Criteria

Click the filter button to expand the available filtering options.

### 2.12.2.4 Searching Payments

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

Payment Credit List



Company Type

Search by Billing name or Reference No

+

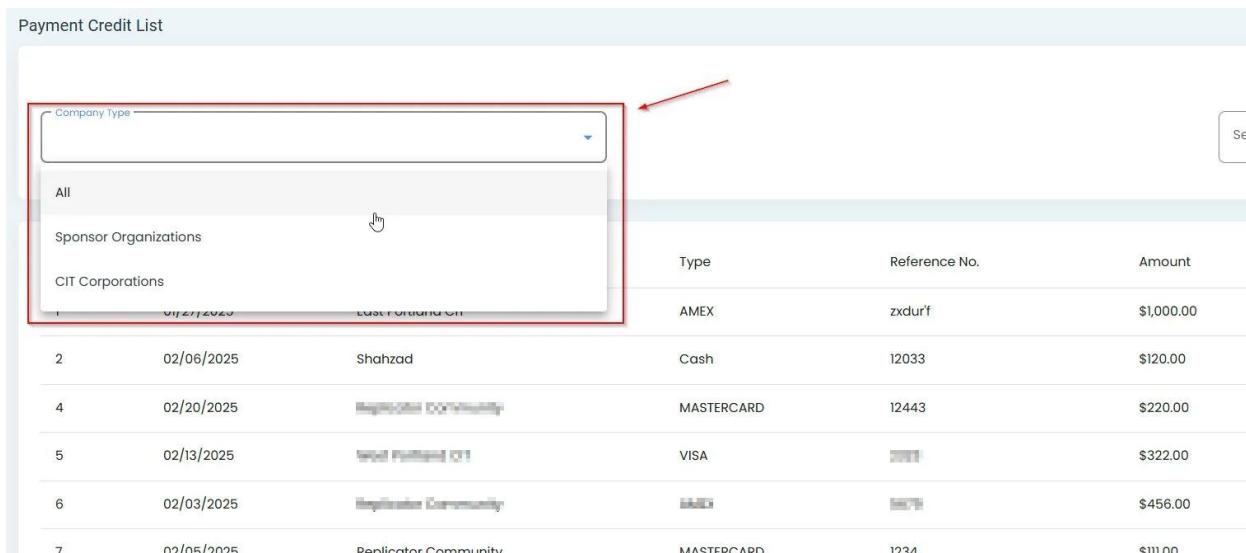
ID Date Bill To Type Reference No. Amount Paid Balance Action

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: 10 1 - 10 of 14 < >

Fig. 134: Filter button location in the Payments table

Payment Credit List



Company Type

All

Sponsor Organizations

CIT Corporations

Sec

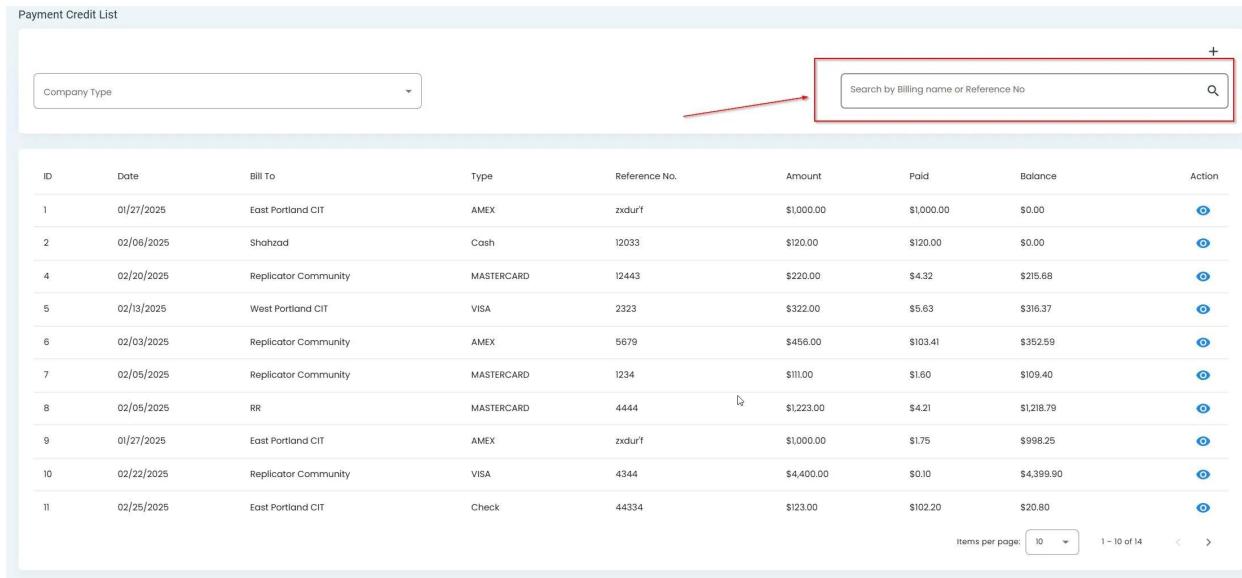
Type Reference No. Amount

1	01/27/2025	East Portland CIT	AMEX	zxdurf	\$1,000.00
2	02/06/2025	Shahzad	Cash	12033	\$120.00
4	02/20/2025	Replicator Community	MASTERCARD	12443	\$220.00
5	02/13/2025	West Portland CIT	VISA	2323	\$322.00
6	02/03/2025	Replicator Community	AMEX	5679	\$456.00
7	02/05/2025	Replicator Community	MASTERCARD	1234	\$111.00

Fig. 135: Expanded filter options for the Payments table

#### 2.12.2.4.1 Step 1: Locate the Search Bar

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



The screenshot shows a table titled 'Payment Credit List'. At the top left is a dropdown menu labeled 'Company Type'. To the right of the table is a search bar with the placeholder 'Search by Billing name or Reference No.' and a magnifying glass icon. A red box and an arrow point to this search bar. The table has columns: ID, Date, Bill To, Type, Reference No., Amount, Paid, Balance, and Action. The data in the table is as follows:

ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur1f	\$1,000.00	\$1,000.00	\$0.00	
2	02/06/2025	Shahzad	Cash	l2033	\$120.00	\$120.00	\$0.00	
4	02/20/2025	Replicator Community	MASTERCARD	l2443	\$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	l234	\$111.00	\$1.60	\$109.40	
8	02/05/2025	RR	MASTERCARD	4444	\$123.00	\$4.21	\$128.79	
9	01/27/2025	East Portland CIT	AMEX	zxdur1f	\$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 < >

Fig. 136: Search bar location in the Payments interface

#### 2.12.2.4.2 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.

#### 2.12.2.5 Additional Features

The Payments section includes additional features for managing payment information:

- View detailed payment information
- Add payment credits to accounts

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	zxdu1f	\$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	zxdu1f	\$1,000.00	\$1.75	\$998.25		
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90		
11	02/25/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80		

Fig. 137: Searchable columns in the Payments table

### 2.12.2.5.1 Viewing Payment Details

The Section: 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*

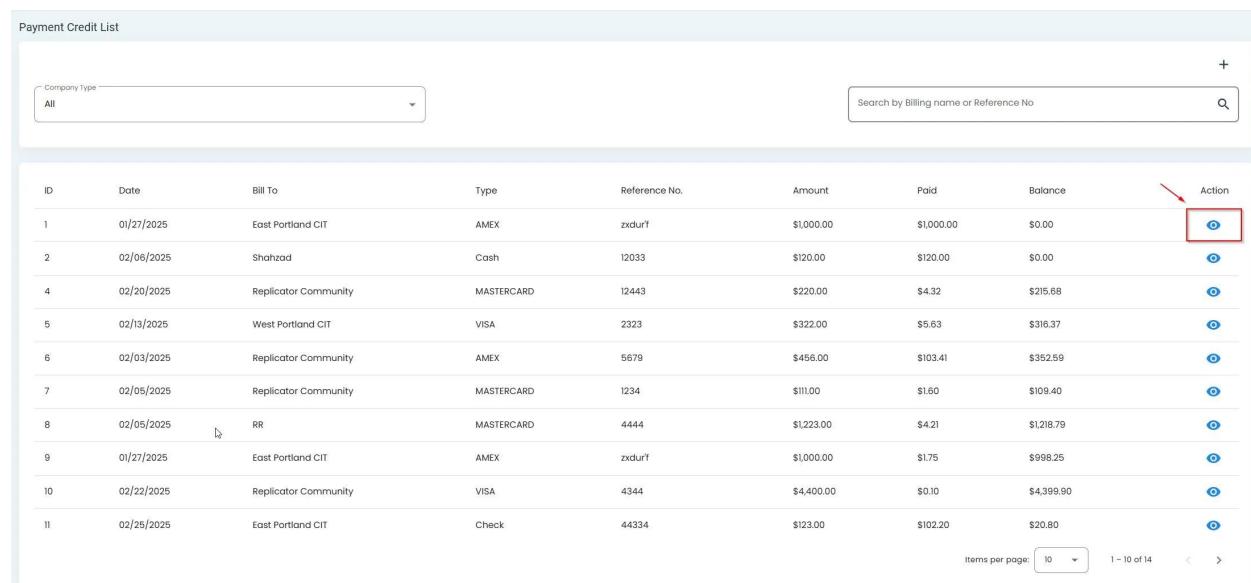
## Overview: Payment Details

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.



ID	Date	Bill To	Type	Reference No.	Amount	Paid	Balance	Action
1	01/27/2025	East Portland CIT	AMEX	zxdur1	\$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	zxdur1	\$1,000.00	\$1.75	\$998.25	
10	02/22/2025	Replicator Community	VISA	4344	\$4,400.00	\$0.10	\$4,399.90	
11	02/28/2025	East Portland CIT	Check	44334	\$123.00	\$102.20	\$20.80	

Fig. 138: 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.

## 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.*	zxdur1	Amount*	\$1,000
Paid*	\$1,000	Balance*	\$0
Note*	Credited		

Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/> I002	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41
<input type="checkbox"/> I003	Setup Fee	01/29/2025	\$1,500.00	\$1,03.87	\$396.13

Items per page: 10 1 - 2 of 2 < >

Fig. 139: Payment Details screen showing comprehensive payment information

Payment Credit Details

Date*	1/27/2025	Payment type*	AMEX
Reference No.*	zxdur1	Amount*	\$1,000
Paid*	\$1,000	Balance*	\$0
Note*	Credited		

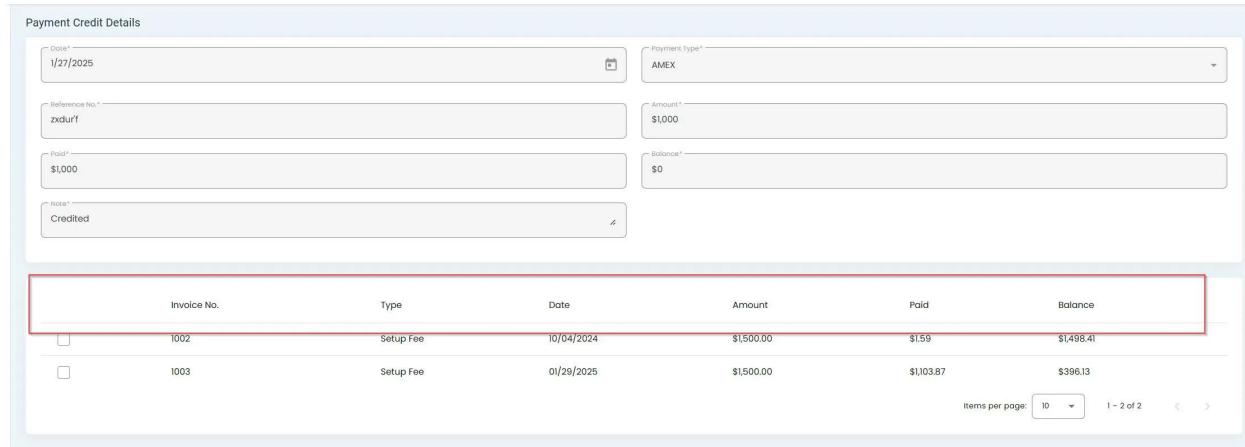
Invoice No.	Type	Date	Amount	Paid	Balance
<input type="checkbox"/> I002	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41
<input type="checkbox"/> I003	Setup Fee	01/29/2025	\$1,500.00	\$1,03.87	\$396.13

Items per page: 10 1 - 2 of 2 < >

Fig. 140: Quick information section highlighted in the Payment Details screen

## Detailed Columns

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



The screenshot shows the 'Payment Credit Details' screen. At the top, there are several input fields: 'Date' (1/27/2025), 'Payment type' (AMEX), 'Reference No.' (zxdur1), 'Amount' (\$1,000), 'Paid' (\$1,000), and 'Balance' (\$0). Below these is a 'note' field with the value 'Credited'. Below the input fields is a table with the following data:

Invoice No.	Type	Date	Amount	Paid	Balance
1002	Setup Fee	10/04/2024	\$1,500.00	\$1.59	\$1,498.41
1003	Setup Fee	01/29/2025	\$1,500.00	\$1,103.87	\$396.13

At the bottom right of the table, there are buttons for 'Items per page' (set to 10), '1 - 2 of 2', and navigation arrows.

Fig. 141: 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

### 2.12.2.5.2 Adding Payment Credits

The Section: 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.

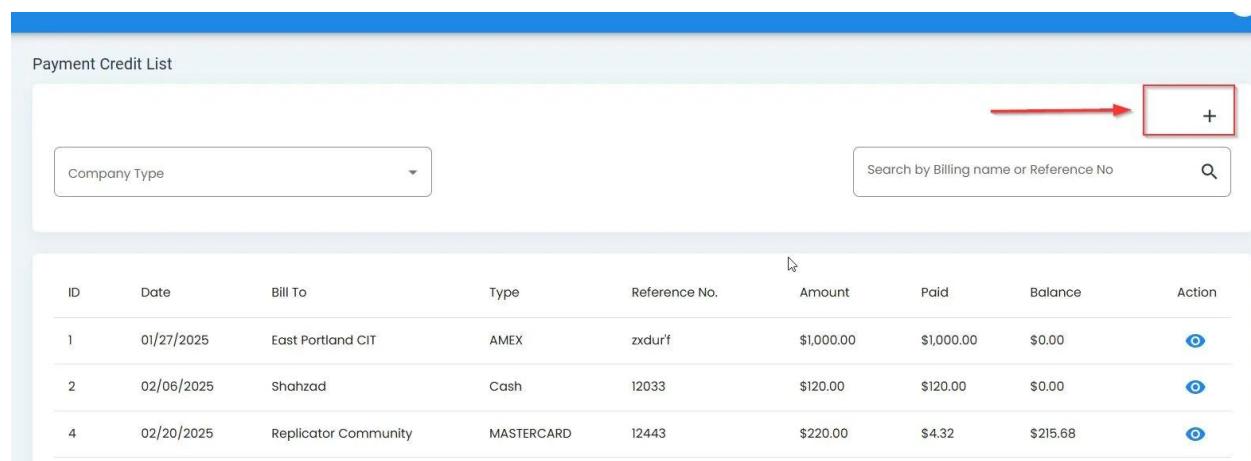


Fig. 142: Location of the Add Payment Credit button

### Step 2: Access the Add Payment Credit Form

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

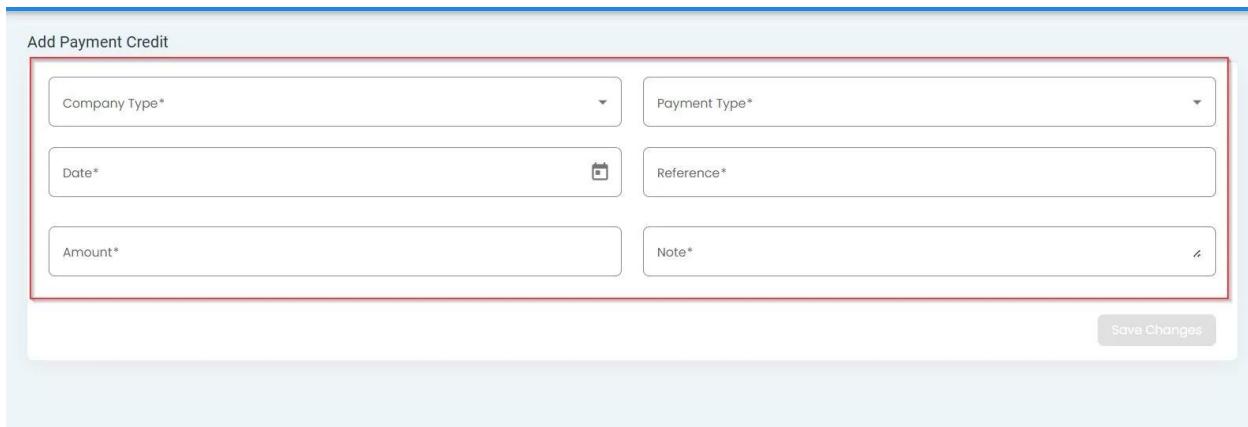
The screenshot shows a form titled "Add Payment Credit". The form contains the following fields:

- Company Type\* (dropdown menu)
- Payment Type\* (dropdown menu)
- Date\* (date picker)
- Reference\* (text input)
- Amount\* (text input)
- Note\* (text input)
- Save Changes (button)

Fig. 143: The Add Payment Credit form

**Note**

All fields in the Add Payment Credit form are required.

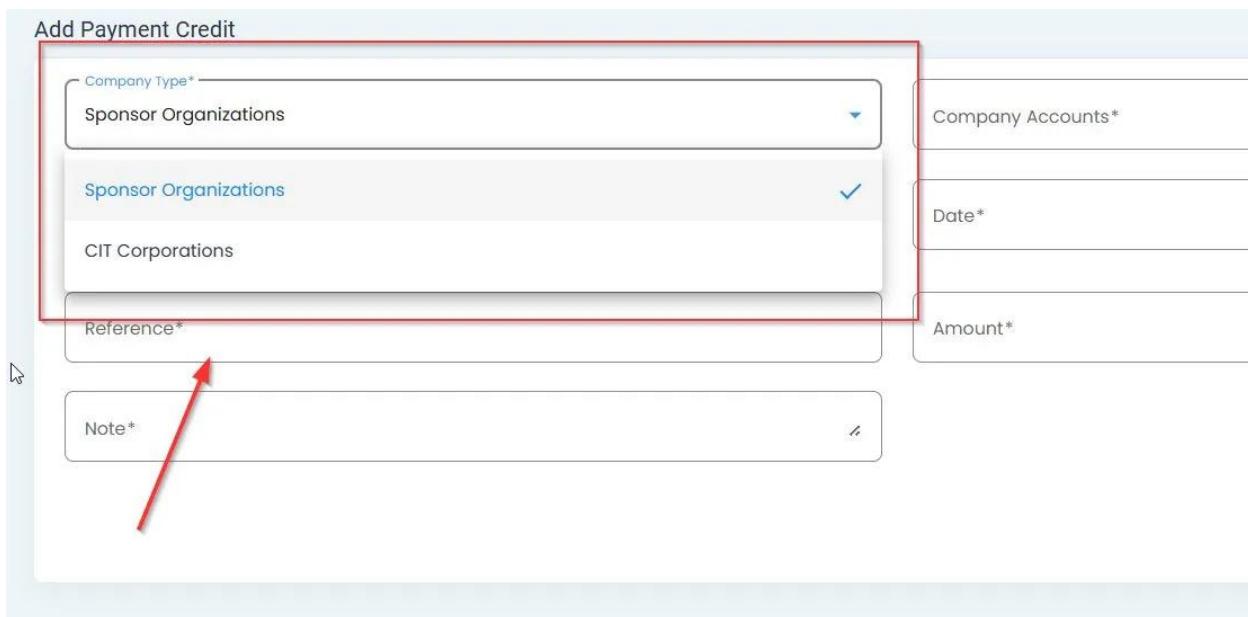


The screenshot shows the 'Add Payment Credit' form. It contains several input fields: 'Company Type\*' (dropdown), 'Payment Type\*' (dropdown), 'Date\*' (date picker), 'Reference\*' (text input), 'Amount\*' (text input), and 'Note\*' (text input). A 'Save Changes' button is located at the bottom right. A red box highlights the entire row of required fields (Company Type, Payment Type, Date, Reference, Amount, Note).

Fig. 144: All fields are required in the Add Payment Credit form

### Step 3: Select Company Type

Choose the appropriate company type from the dropdown menu.

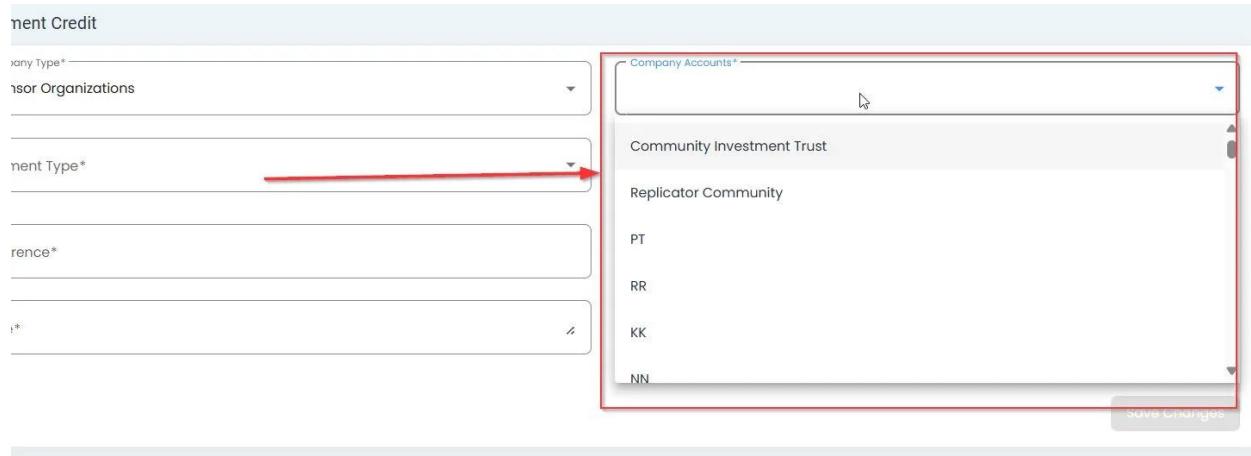


The screenshot shows the 'Add Payment Credit' form. The 'Company Type\*' dropdown is open, showing 'Sponsor Organizations' and 'CIT Corporations'. 'Sponsor Organizations' is selected and highlighted with a blue checkmark. A red box highlights the 'Company Type\*' dropdown. A red arrow points from the 'Note\*' field (which is also highlighted with a red box) towards the 'Company Type\*' dropdown, likely indicating that the company type selection is a prerequisite for the note field.

Fig. 145: 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.

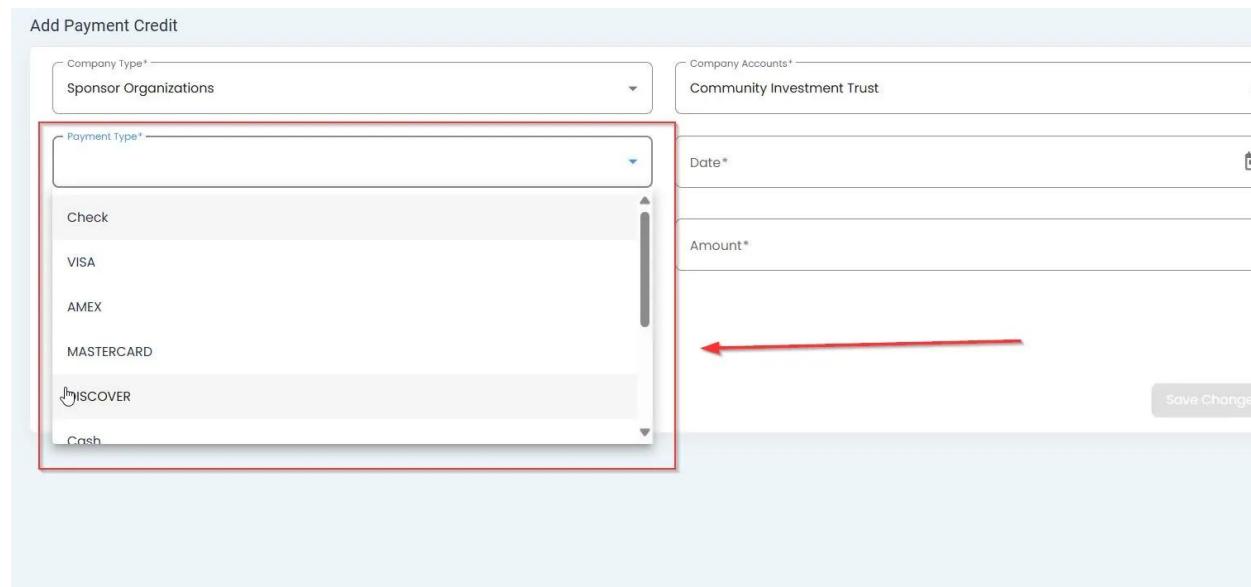


The screenshot shows the 'Add Payment Credit' form. On the left, there are several input fields: 'Company Type\*' (dropdown menu showing 'Sponsor Organizations'), 'Payment Type\*' (dropdown menu showing 'Check', 'VISA', 'AMEX', 'MASTERCARD', 'DISCOVER', and 'Cash'), 'Reference\*', and 'Comments\*'. On the right, a dropdown menu titled 'Company Accounts\*' is open, listing 'Community Investment Trust', 'Replicator Community', 'PT', 'RR', 'KK', and 'NN'. A red arrow points from the 'Payment Type\*' dropdown on the left towards the open 'Company Accounts\*' dropdown on the right. A 'Save Changes' button is visible at the bottom right of the form.

Fig. 146: Selecting the company account in the Add Payment Credit form

#### Step 5: Select Payment Type

Choose the appropriate payment type from the available options.

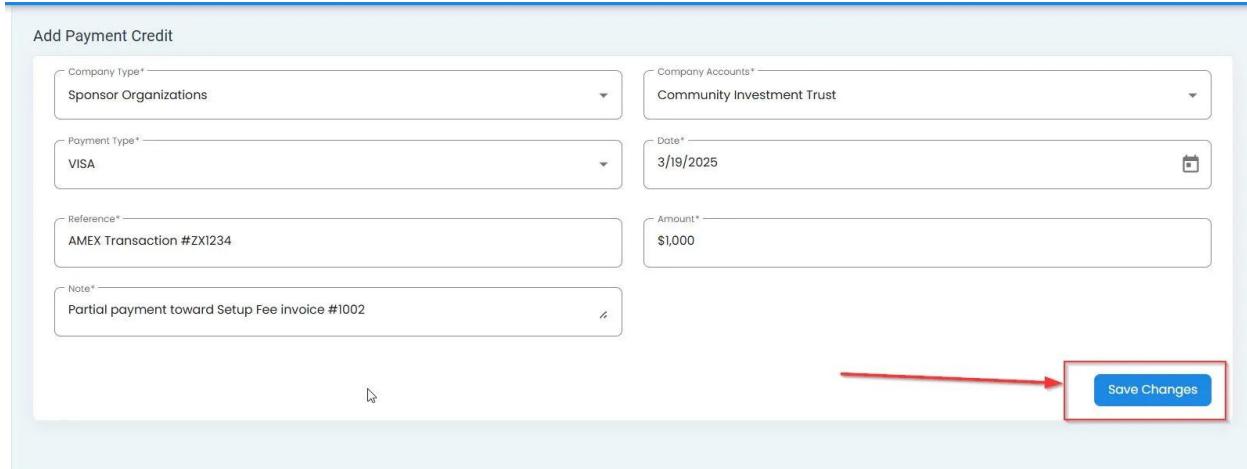


The screenshot shows the 'Add Payment Credit' form. On the left, there are dropdown menus for 'Company Type\*' (showing 'Sponsor Organizations') and 'Payment Type\*' (showing 'Check', 'VISA', 'AMEX', 'MASTERCARD', 'DISCOVER', and 'Cash'). On the right, there are input fields for 'Date\*' and 'Amount\*'. A red arrow points from the 'Payment Type\*' dropdown on the left towards the open 'Payment Type\*' dropdown on the right. A 'Save Changes' button is visible at the bottom right of the form.

Fig. 147: 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. It contains the following fields:

- Company Type\*: Sponsor Organizations
- Company Accounts\*: Community Investment Trust
- Payment Type\*: VISA
- Date\*: 3/19/2025
- Reference\*: AMEX Transaction #ZXL234
- Amount\*: \$1,000
- Note\*: Partial payment toward Setup Fee invoice #1002

A red arrow points to the 'Save Changes' button in the bottom right corner of the form.

Fig. 148: 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.

### 2.12.3 Statement

#### Contents

- *Statement*

### 2.12.4 Payment Management

The Section: 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*

#### 2.12.4.1 Features: Payment Management

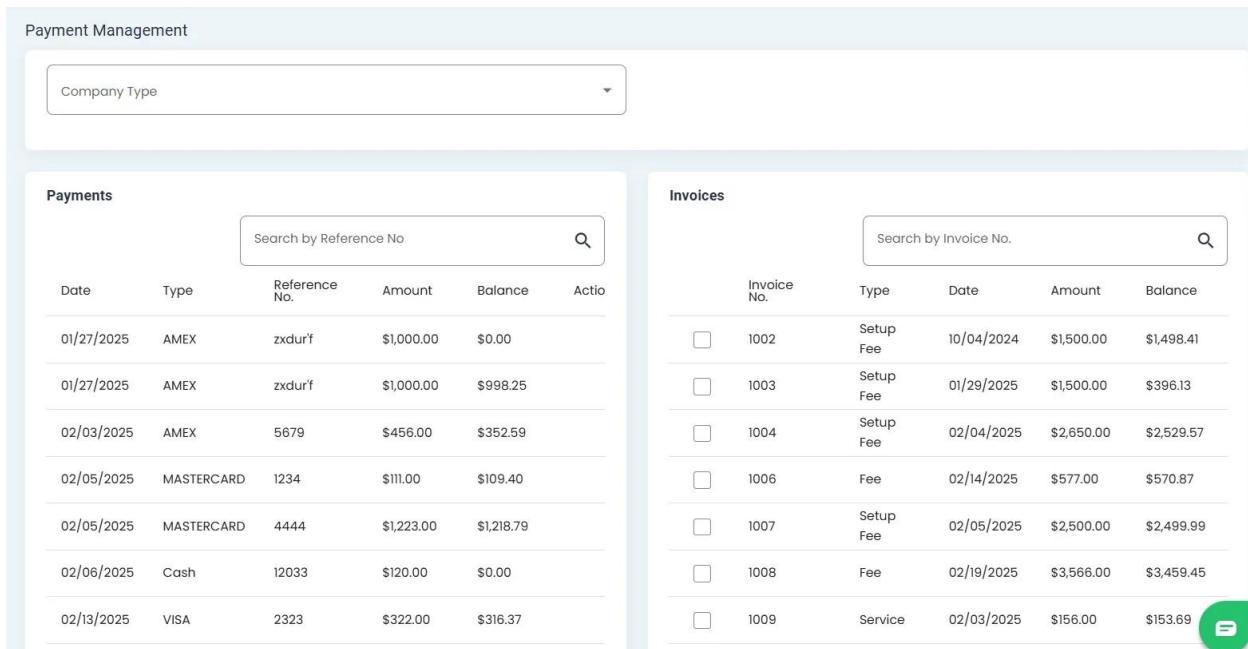
- View and manage payments
- Track and process invoices
- Filter records by various criteria
- Search for specific payment and invoice entries

#### 2.12.4.2 Layout: Payment Management Homepage

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

- Table: Payments Table - Shows all payment records
- Table: Invoices Table - Shows all invoice records

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



The screenshot shows the 'Payment Management' homepage. At the top, there is a dropdown menu labeled 'Company Type'. Below it, there are two main sections: 'Payments' on the left and 'Invoices' on the right. Each section has a search bar at the top. The 'Payments' section table has columns: Date, Type, Reference No., Amount, Balance, and Action. The 'Invoices' section table has columns: Invoice No., Type, Date, Amount, and Balance. Both tables contain several rows of data. A green circular button with a white icon is located in the bottom right corner of the page.

Payments					
<input type="text" value="Search by Reference No."/> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px; margin-left: 10px;">🔍</span>					
Date	Type	Reference No.	Amount	Balance	Action
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					
<input type="text" value="Search by Invoice No."/> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px; margin-left: 10px;">🔍</span>					
Invoice No.	Type	Date	Amount	Balance	Action
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41	
1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13	
1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57	
1006	Fee	02/14/2025	\$577.00	\$570.87	
1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99	
1008	Fee	02/19/2025	\$3,566.00	\$3,459.45	
1009	Service	02/03/2025	\$156.00	\$153.69	<span style="border: 1px solid #00c080; border-radius: 50%; padding: 5px 10px; color: white; font-weight: bold;">≡</span>

Fig. 149: Payment Management Homepage with two separate tables

#### 2.12.4.2.1 Table Names

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

#### 2.12.4.2.2 Table Sections

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

#### 2.12.4.3 Columns: Payment Management Tables

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

#### 2.12.4.4 Search Functionality

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

#### 2.12.4.5 Filtering Records

Both tables offer filtering capabilities to narrow down displayed records.

Payment Management					
Company Type					
Payments			Invoices		
Search by Reference No			Search by Invoice No.		
Date	Type	Reference No.	Amount	Balance	Action
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	

Fig. 150: Table names displayed at the top of each section

Payment Management					
Company Type					
Payments			Invoices		
Search by Reference No			Search by Invoice No.		
Date	Type	Reference No.	Amount	Balance	Action
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	

Fig. 151: Payment Management page divided into two separate table sections

Payment Management					
Payments					
Invoices					
Search by Reference No.					
Date	Type	Reference No.	Amount	Balance	Action
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	
Search by Invoice No.					
Invoice No.	Type	Date	Amount	Balance	
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41	
1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13	
1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57	
1006	Fee	02/14/2025	\$577.00	\$570.87	
1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99	
1008	Fee	02/19/2025	\$3,566.00	\$3,459.45	
1009	Service	02/03/2025	\$156.00	\$153.69	

Fig. 152: Columns displayed in the Payment and Invoice tables

Payment Management					
Payments					
Invoices					
Search by Reference No.					
Date	Type	Reference No.	Amount	Balance	Action
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	
Search by Invoice No.					
Invoice No.	Type	Date	Amount	Balance	
1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41	
1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13	
1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57	
1006	Fee	02/14/2025	\$577.00	\$570.87	
1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99	
1008	Fee	02/19/2025	\$3,566.00	\$3,459.45	
1009	Service	02/03/2025	\$156.00	\$153.69	

Fig. 153: Search bar location for each table

Payment Management

Company Type

**Payments**

Date	Type	Reference No.	Amount	Balance	Action
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**

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

Fig. 154: Filter options available for Payment Management tables

#### 2.12.4.5.1 Matching Payments to Invoices

The Section: 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*

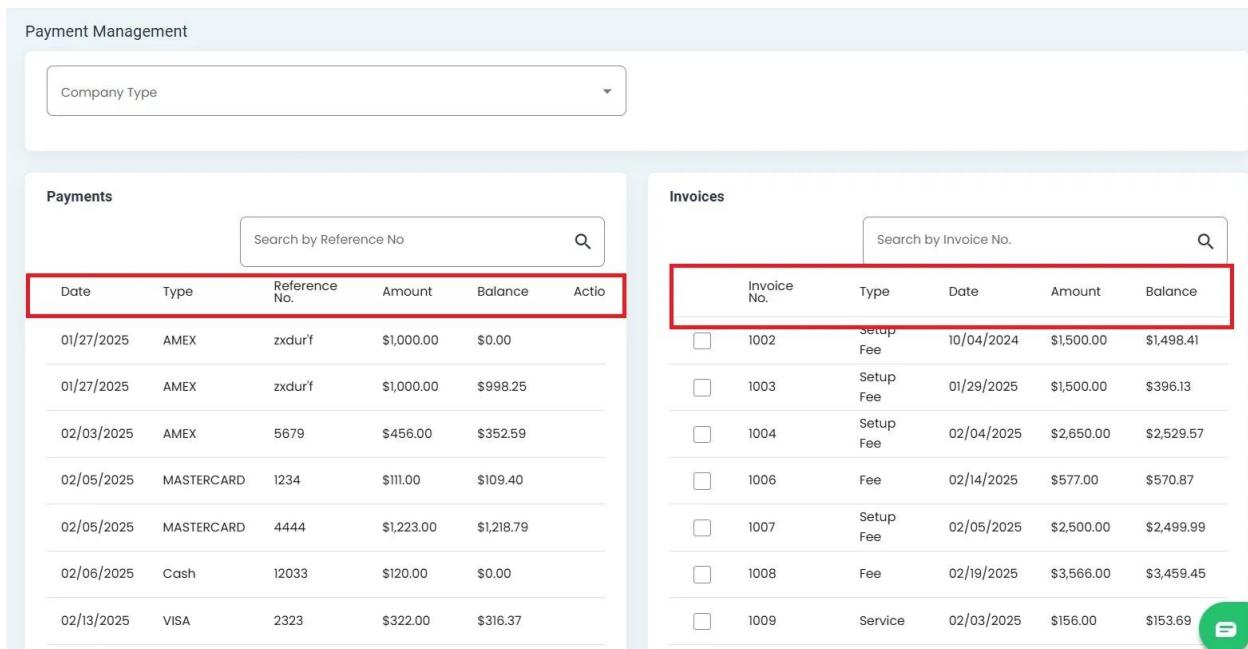
## Overview: Matching Payments to Invoices

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 Table: Invoices Table.



The screenshot shows two tables side-by-side. The left table is titled 'Payments' and the right table is titled 'Invoices'. Both tables have a search bar at the top. The 'Invoices' table has a red box drawn around the first column, which contains checkboxes. The 'Payments' table has a red box around the last column, which is labeled 'Action'.

Payments						Invoices					
Search by Reference No <input type="text"/> <input type="button" value="Search"/>						Search by Invoice No. <input type="text"/> <input type="button" value="Search"/>					
Date	Type	Reference No.	Amount	Balance	Action	Invoice No.	Type	Date	Amount	Balance	Action
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00		1002	Setup Fee	10/04/2024	\$1,500.00	\$1,498.41	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25		1003	Setup Fee	01/29/2025	\$1,500.00	\$396.13	
02/03/2025	AMEX	5679	\$456.00	\$352.59		1004	Setup Fee	02/04/2025	\$2,650.00	\$2,529.57	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40		1006	Fee	02/14/2025	\$577.00	\$570.87	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79		1007	Setup Fee	02/05/2025	\$2,500.00	\$2,499.99	
02/06/2025	Cash	12033	\$120.00	\$0.00		1008	Fee	02/19/2025	\$3,566.00	\$3,459.45	
02/13/2025	VISA	2323	\$322.00	\$316.37		1009	Service	02/03/2025	\$156.00	\$153.69	<input type="button" value="Match"/>

Fig. 155: 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.

### 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**

Date	Type	Reference No.	Amount	Balance	Action
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	
02/20/2025	MASTERCARD	12443	\$220.00	\$215.68	
02/22/2025	VISA	4344	\$4,400.00	\$4,399.90	

**Invoices**

Invoice No.	Type	Date
1002	Setup Fee	10/04/2024
1003	Setup Fee	01/29/2025
1004	Setup Fee	02/04/2022
1006	Fee	02/14/2025
1007	Setup Fee	02/05/2022
1008	Fee	02/19/2025
1009	Service	02/03/2021
1010	Service	02/12/2025
1011	Fee	02/06/2022

Fig. 156: Selecting an invoice by checking the checkbox

**Payments**

Date	Type	Reference No.	Amount	Balance	Action
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	
02/20/2025	MASTERCARD	12443	\$220.00	\$215.68	
02/22/2025	VISA	4344	\$4,400.00	\$4,399.90	

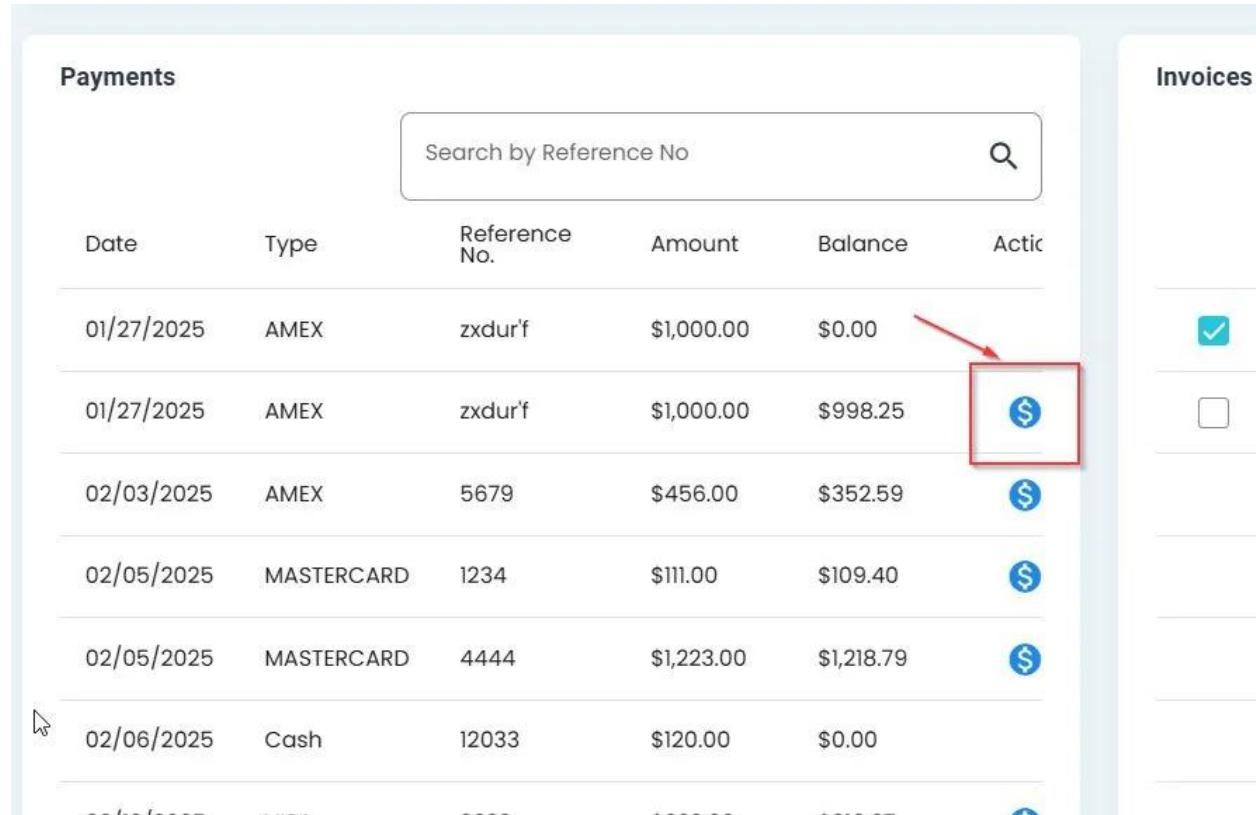
**Invoices**

Invoice No.	Type	Date
1002	Setup Fee	10/04/2024
1003	Setup Fee	01/29/2025
1004	Setup Fee	02/04/2022
1006	Fee	02/14/2025
1007	Setup Fee	02/05/2022
1008	Fee	02/19/2025
1009	Service	02/03/2021
1010	Service	02/12/2025
1011	Fee	02/06/2022

Fig. 157: 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.



The screenshot shows a 'Payments' screen with a 'Search by Reference No' bar. Below is a table of payment records:

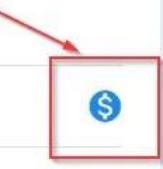
Date	Type	Reference No.	Amount	Balance	Action
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$998.25	
02/03/2025	AMEX	5679	\$456.00	\$352.59	
02/05/2025	MASTERCARD	1234	\$111.00	\$109.40	
02/05/2025	MASTERCARD	4444	\$1,223.00	\$1,218.79	
02/06/2025	Cash	12033	\$120.00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

Fig. 158: Click the payment action button to initiate payment

#### Step 5: View Payment Window

A payment popup window will appear with available payment information.

#### Step 6: Locate Apply Payment Field

Find the Apply Payment field in the payment window.

#### Step 7: Enter Payment Amount

Enter the desired payment amount in the Apply Payment field.

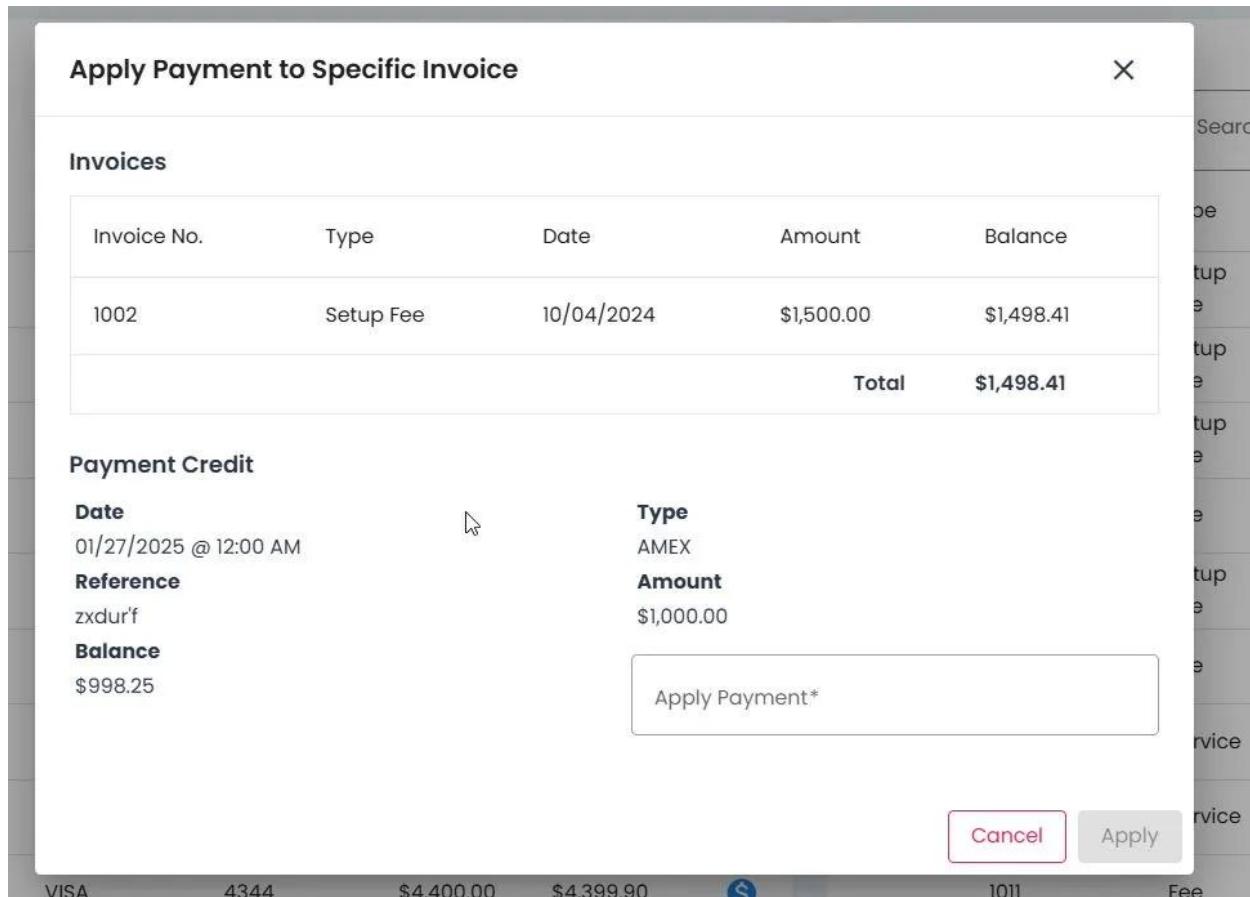


Fig. 159: Payment popup window with available information

**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**

**Date**  
01/27/2025 @ 12:00 AM

**Reference**  
zxdur'f

**Balance**  
\$998.25

**Type**  
AMEX

**Amount**  
\$1,000.00

**Apply Payment\***

**Cancel** **Apply**

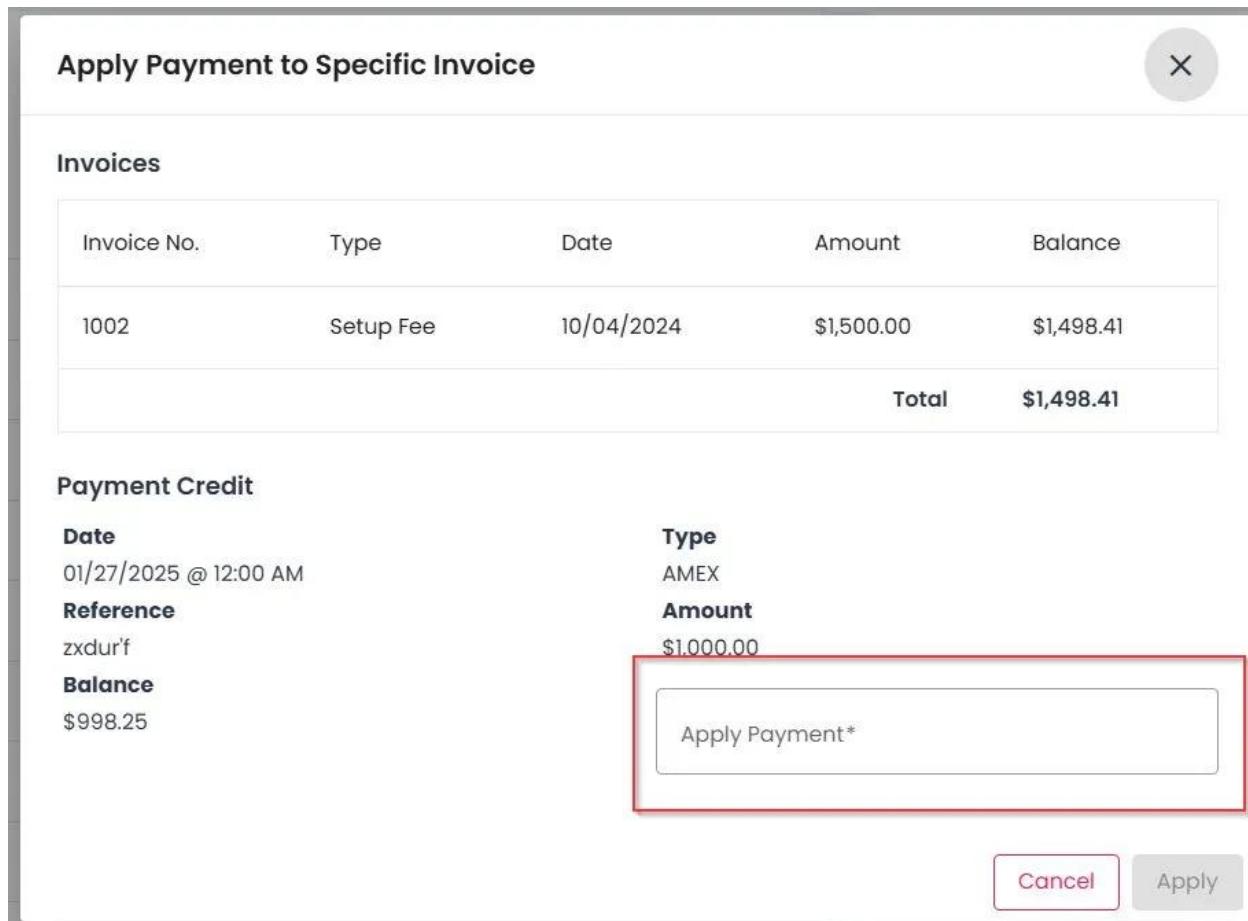


Fig. 160: Locate the Apply Payment field in the window

Apply Payment to Specific Invoice X

**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\* —

Cancel Apply



Fig. 161: 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
				Total \$1,498.41

Payment Credit

Date	Type
01/27/2025 @ 12:00 AM	AMEX
Reference	Amount
zxdur'f	\$1,000.00
Balance	Apply Payment*
\$998.25	\$998.25

Apply

Fig. 162: Click the Save button to complete the payment

### Result: Payment Confirmation

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

### 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.

**Payments**

Date	Type	Reference No.	Amount	Balance	Action
01/27/2025	AMEX	zxdur'f	\$1,000.00	\$0.00	
01/27/2025	AMEX	zxdur'f	\$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
1002	Set Fee
1003	Set Fee
1004	Set Fee
1006	Fee
1007	Set Fee
1008	Fee
1009	Ser
1010	Ser
1011	Fee
1012	Ser

✓ Saved!
✖

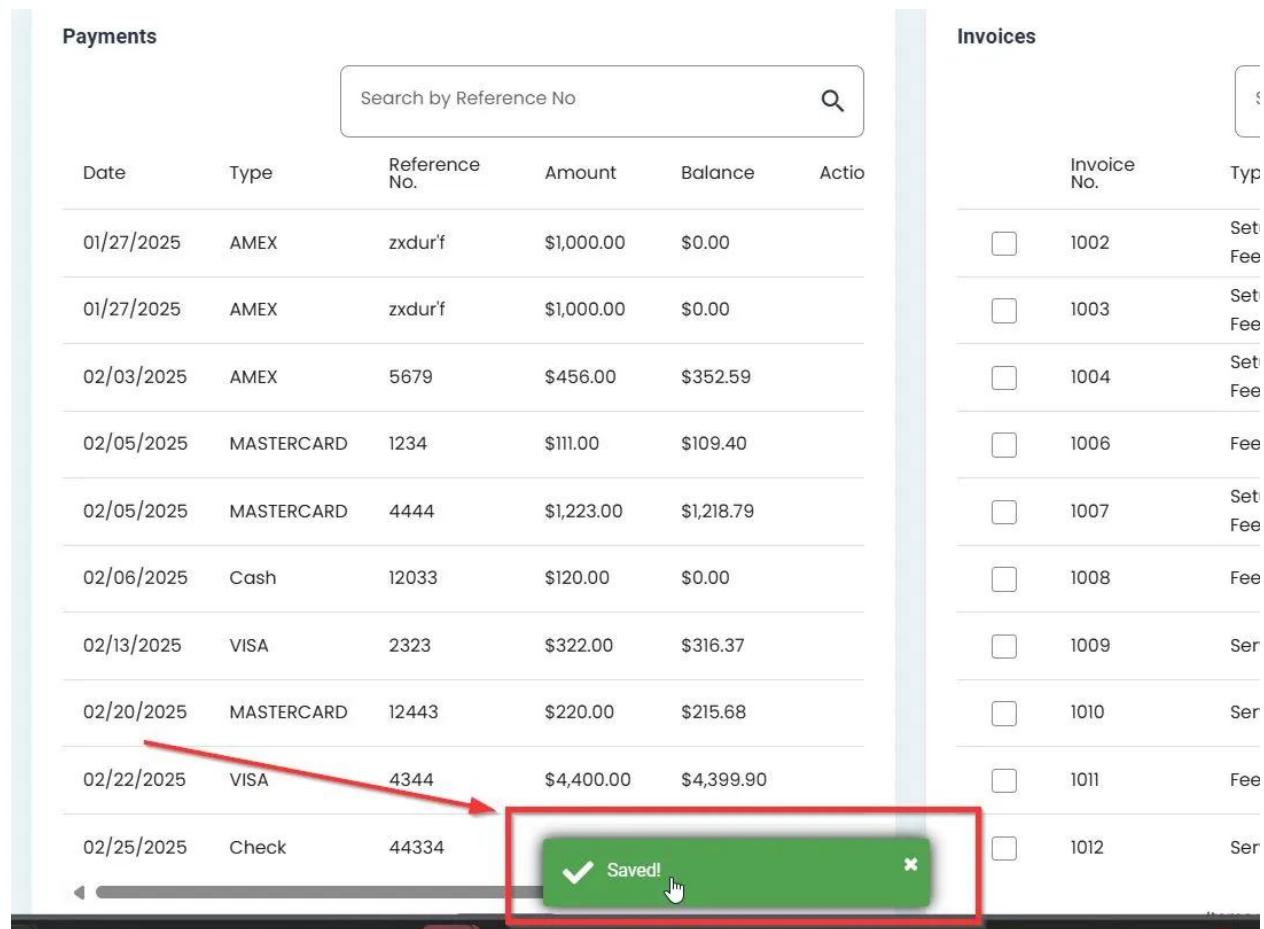


Fig. 163: Success message confirming the payment has been applied