COMMUNITY INVESTMENT TRUST

Contents

Welcome to the documentation for the Item: Investors 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

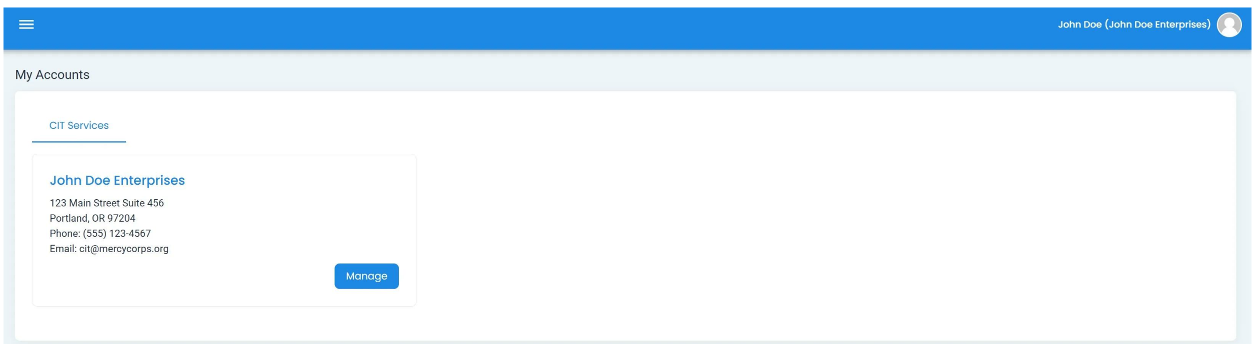


Fig. 1: CIT App, My Accounts Screen, Homepage

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

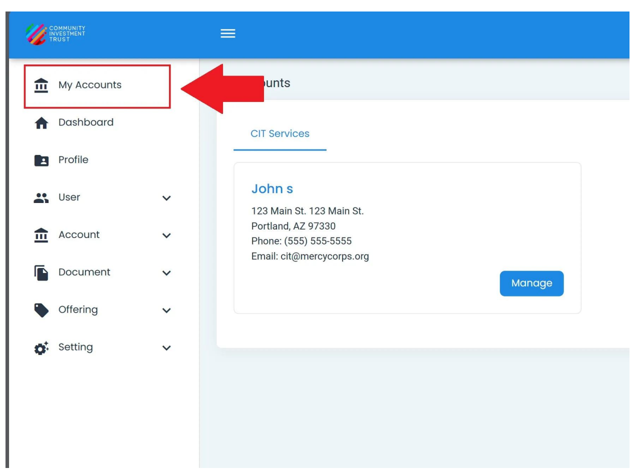
2.1 My Accounts

2.1.1 Managing Different Accounts

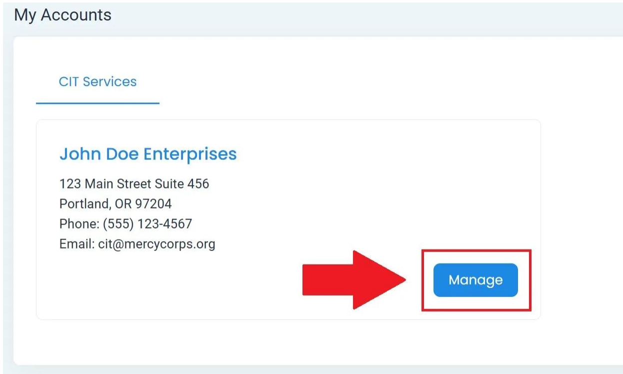
Managing accounts allows you to quickly navigate between the homepages of different accounts.

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., Item: ((Option: {current account being managed}Item:)).

It is:

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

2.2 Dashboard

The Section: Dashboard section for **Investors** allows Investors to:

- View all their investments,
- Check investment statuses,
- *Re-enroll in investments*,
- *De-Enroll in investments*

../../_static/solo_app/Dashboard/dashboard-investors.jpeg

Fig. 1: Dashboard, Investors, One Investment

2.2.1 Re-Enrollment Instructions

Follow the instructions below to re-enroll in an investment:

2.2.1.1 1. Find the investment you want to re-enroll in.

2.2.1.2 2. Click on "Re-enroll" button

- Click on the **Re-enroll** button for the investment you want to enroll or denroll from.

../../_static/solo_app/Dashboard/re-de-enroll-button-location.jpeg

Fig. 2: Dashboard, Re-Enroll Button Location

2.2.1.3 3. Answer the pop-up message by clicking either the Item: Yes or Item: No selections.

../../_static/solo_app/Dashboard/dashboard-investors-re-enrollment-popup.jpeg

Fig. 3: Dashboard, Re-Enroll Pop-up

Action Complete

You have successfully re-enrolled in the investment. You should see the following as a result:

../../_static/solo_app/Dashboard/dashboard-investors-re-enrollment-popup-action-complete.jpeg

Fig. 4: Dashboard, Re-Enroll Action Complete

2.2.2 De-Enrollment Instructions

Follow the instructions below to de-enroll in an investment:

2.2.2.1 1. Find the investment you want to de-enroll in.

2.2.2.2 2. Click on the De-enroll button

- Click on the **De-enroll** button for the investment you want to enroll or denroll from.

../../_static/solo_app/Dashboard/dashboard-investors-request-stop-investing-button-location.jpeg

Fig. 5: Dashboard, De-Enroll Button Location

2.2.2.3 3. Answer the pop-up message

- Answer the pop-up message by clicking either the Item: Yes or Item: No selections.

../../_static/solo_app/Dashboard/dashboard-investors-de-enrollment-popup.jpeg

Fig. 6: Dashboard, De-Enroll Pop-up

Action Complete

You have successfully de-enrolled in the investment. You should see the following as a result:

../../_static/solo_app/Dashboard/dashboard-investors-de-enrollment-popup-action-complet

Fig. 7: Dashboard, De-Enroll Action Complete

2.3 Investor

The Section: Investor section opens up to a table with two different tabs:

- *Investor Information Tab*
- Beneficiary Tab

2.3.1 Investor Information Tab

The Tab: Investor Information tab opens up to an editable table:

The available information located on the Tab: Investor Information tab includes the following:

- Personal Information
- Contact Information
- Primary Mailing Address
- Mailing Address

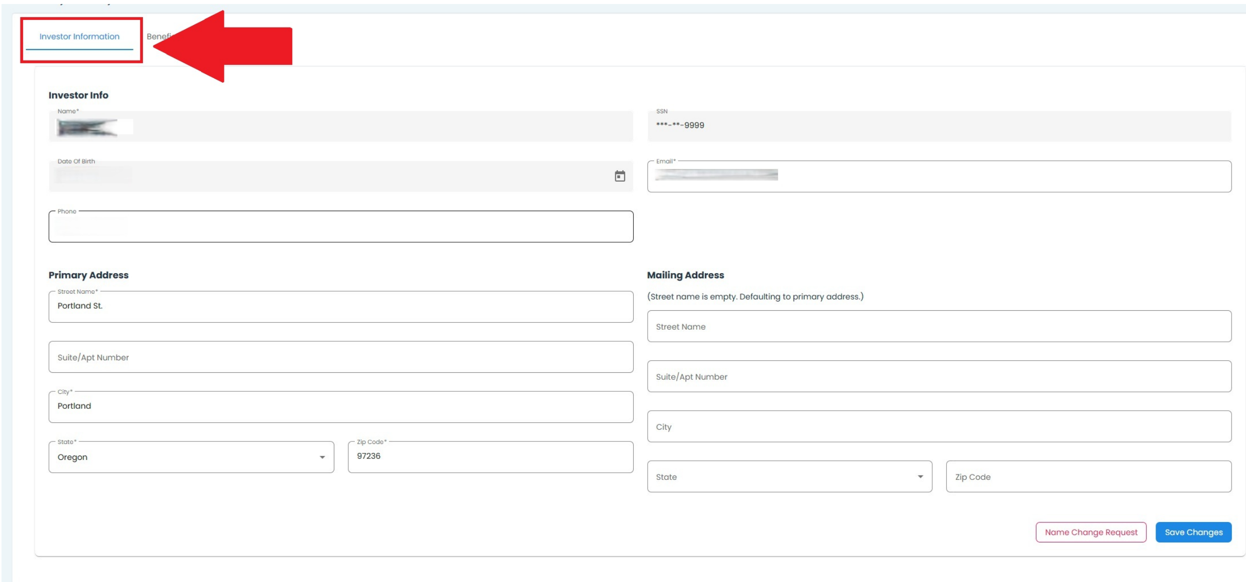


Fig. 8: Investor Information Tab

Note

Click inside any cell that isn't greyed out to start editing.

2.3.2 Beneficiaries Tab

The Tab: Beneficiaries tab allows you view information about beneficiaries.

2.4 Document

This following Section: Sections are included in the file_copyDocument Category: Document category for Investors:

1. Offering Signed Documents
2. Financial Documents

2.5 Bank Information

The Section: Banking section includes all information related the banking information we have for you online.

The Section: Bank Information section is broken up into two subsections:

- Bank Account List
- Banks Table

../_static/solo_app/Investor/investor-beneficiaries-tab-no-beneficiaries.jpeg

Fig. 9: Beneficiaries Tab

../_static/solo_app/BankInformation/bank-information-homepage.jpeg

Fig. 10: Bank Information

2.6 Bank Account List

The Bank Account List subsection for this page is located at the top of the page. Banks here are listed in tile-format.

../_static/solo_app/BankInformation/banking-information-homepage-bank-account-list-location.jpeg

Fig. 11: Bank Information, Bank Account List Location

2.7 Banks Table

The Table: Banks table has the following Column: columns:

- Column: ID
- Column: Bank Name
- Column: Routing Number
- Column: Action

../_static/solo_app/BankInformation/banking-information-homepage-banks-table-column-location.jpeg

Fig. 12: Bank Information, Banks Table, Columns Location

2.8 Investment

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

Contents

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.

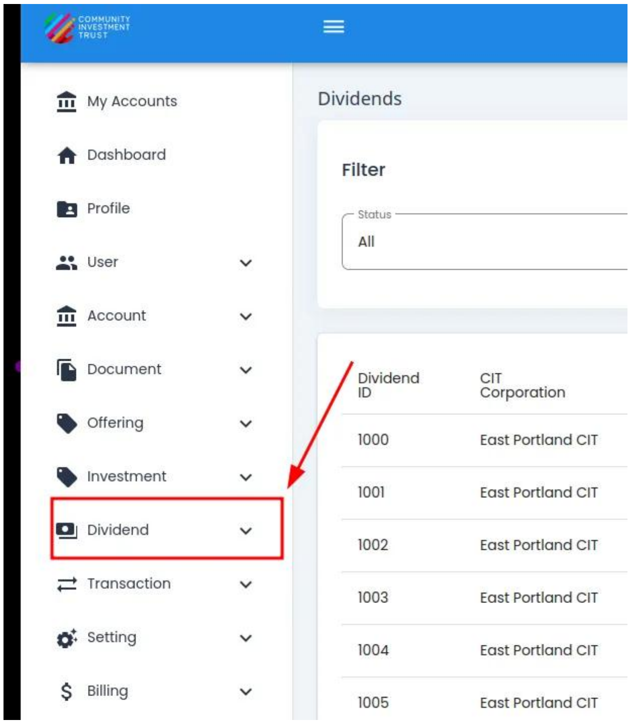


Fig. 13: Investment Category, Primary Sidenav Location

3. Select Section: Investments from the dropdown.

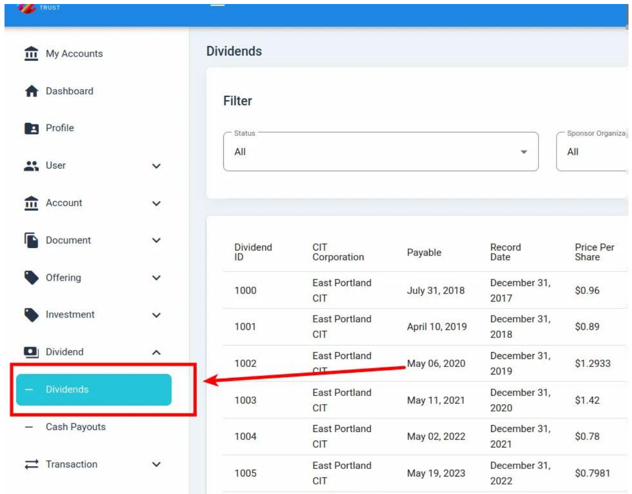


Fig. 14: Investment, Investments, Primary Sidenav Location

2.8.2 Investments List Table Overview

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

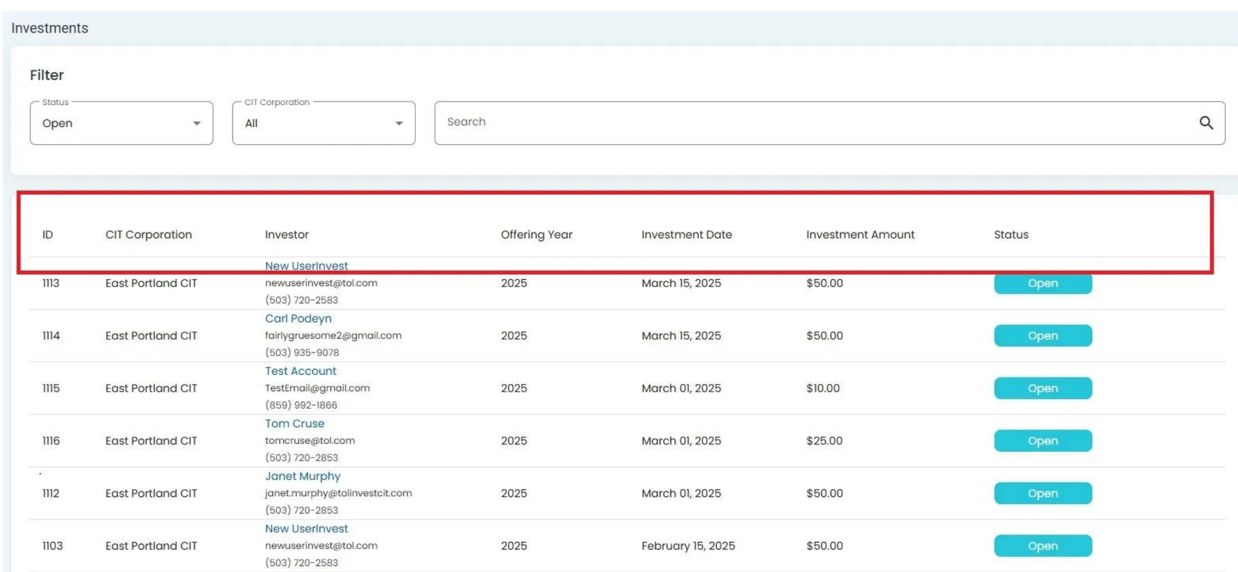


Fig. 15: Investment, Investments List Table

2.8.3 Using Investments Filters

To Filter Investments:

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

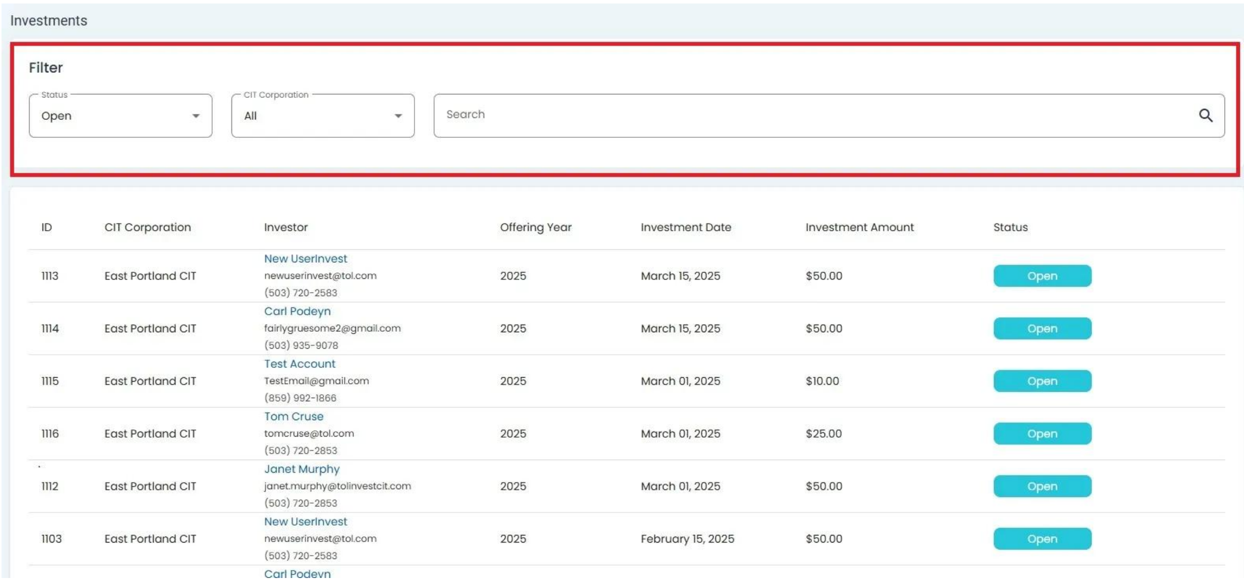


Fig. 16: Investments Table Filter Section Highlighted

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

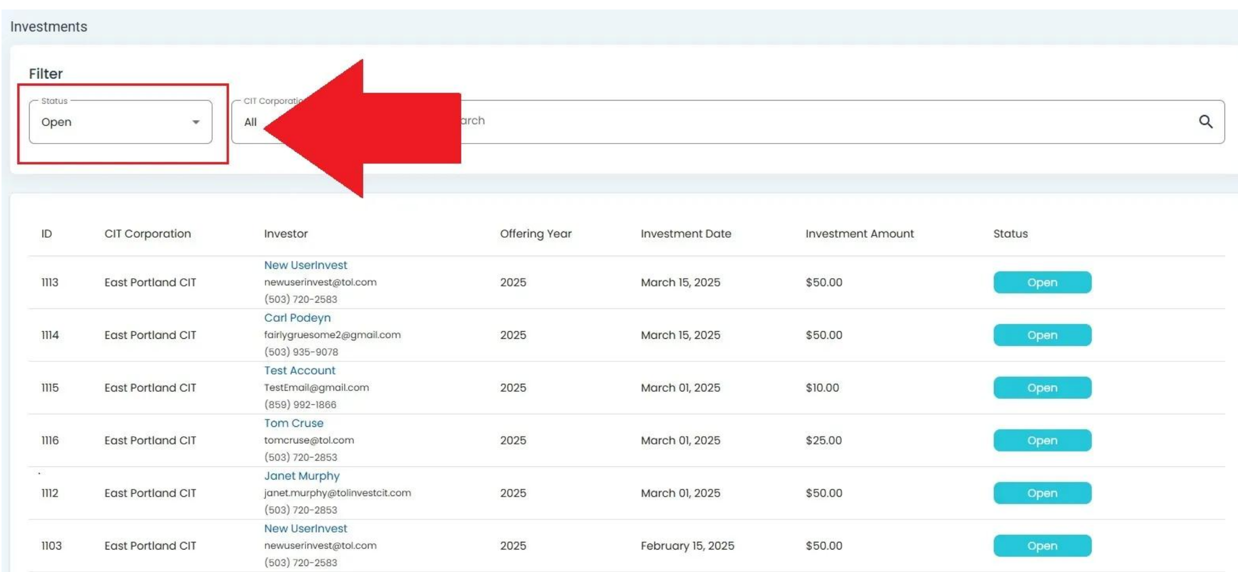


Fig. 17: Investments Status Dropdown Location

   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:

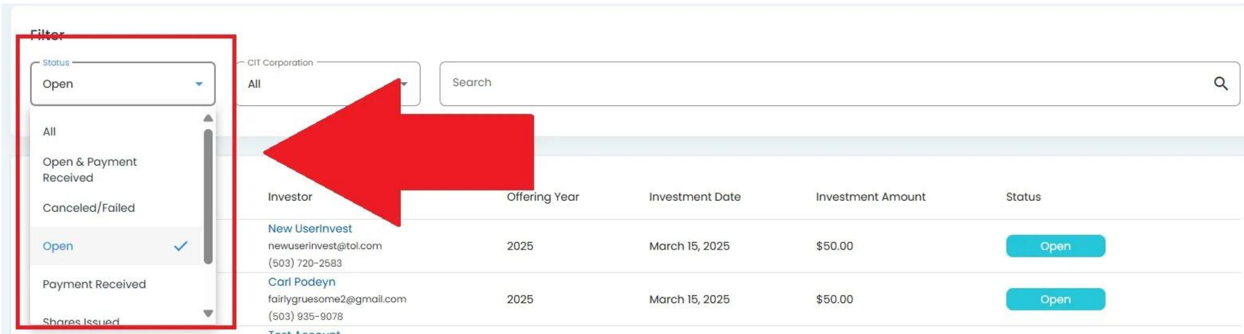


Fig. 18: Investments Status Dropdown Expanded

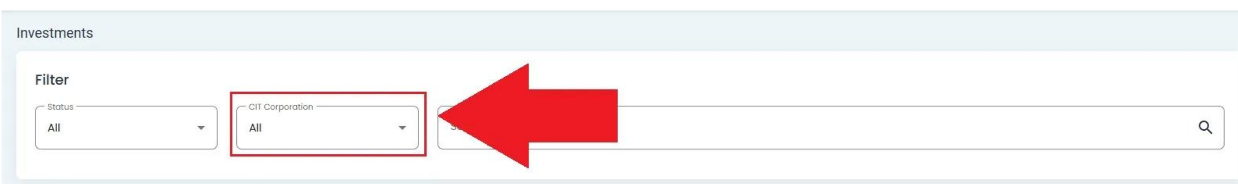


Fig. 19: CIT Corporation Dropdown Location

Fig. 20: CIT Corporation Dropdown Expanded

4. Click the search icon to apply filters.

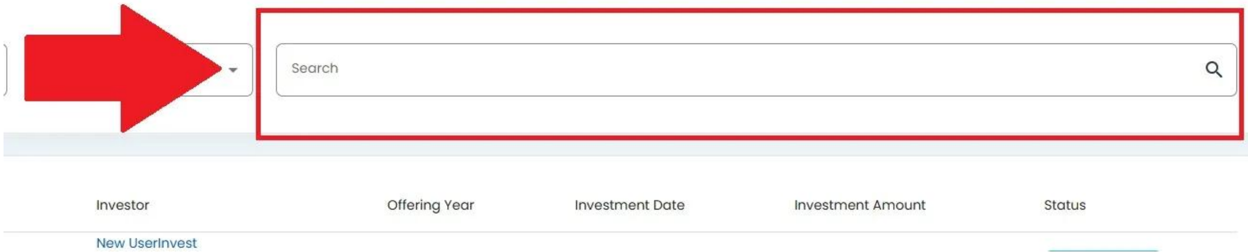


Fig. 21: Search Icon Location

Your filtered results will appear:

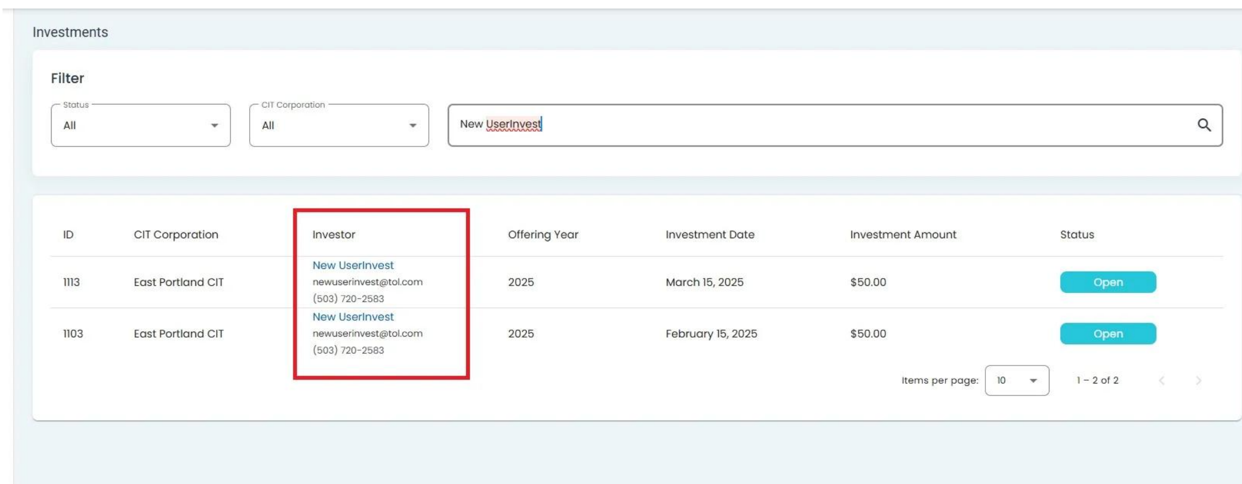


Fig. 22: Search Results

2.9 Messages

This is the Section: Messages section. It still needs to have information added to it.

2.10 Change Request

This is the Section: Change Request section. It still needs to have information added to it.

2.11 Assessment Test

This is the Section: Assessment Test section. It still needs to have information added to it.

2.12 Holdings

This is the holdings page. Information still needs to be added.

2.13 Cashout

This is the Section: Cashout section. It still needs to have information added to it.