

## Guidelines for CSO's Secure Application Portal www.cso.com

The following instructions will provide you with the information needed to register your account and provide information regarding the applications available to you.

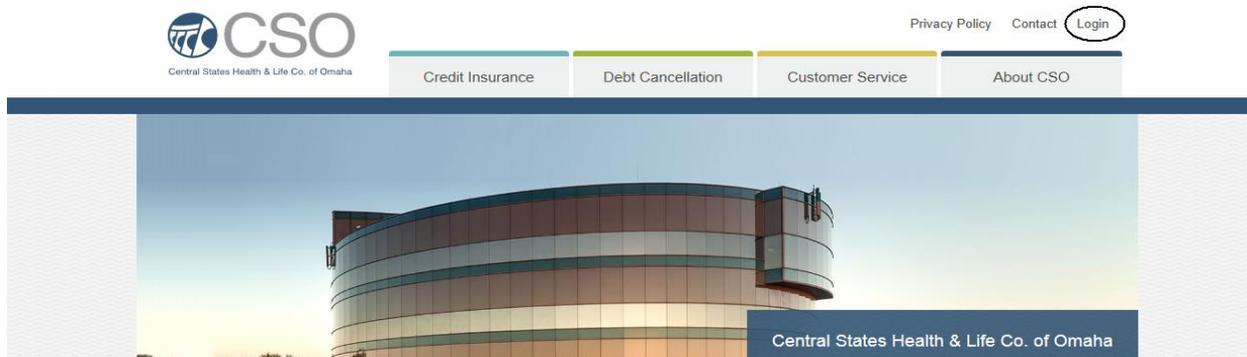
Once you register, the following applications will be available to you:

- **Cancellation Quote** – This application will allow you to receive an online cancellation quote to ensure you have the correct refund amount.
- **Proof of Payoff Notice** - This application will give you access to the Proof of Payoff Notice received from one of your customers.
- **Business Submission Form** - This application allows you to print a Credit Report of New Business and Cancellations, Form 601.
- **QuikCalc Download** – This application allows you to download the QuikCalc Premium and Refund Quoting program for your use.
- **Claim Status** – This application allows you to view recent claim activity for your customers.

If you have any questions, feel free to call us at 1-800-826-6587.

### To Access the Secure Application Portal

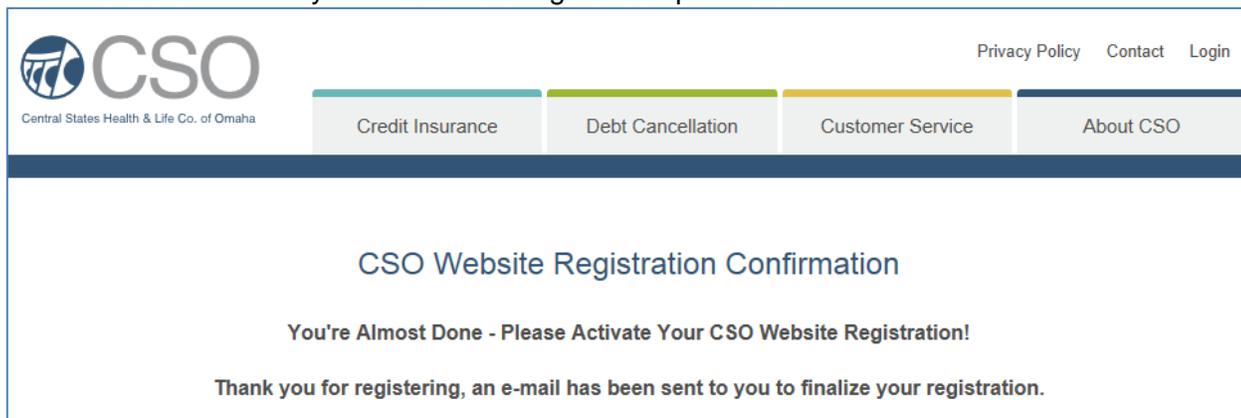
From the CSO website, click on Login in the upper right corner to access the Secure Application Portal.



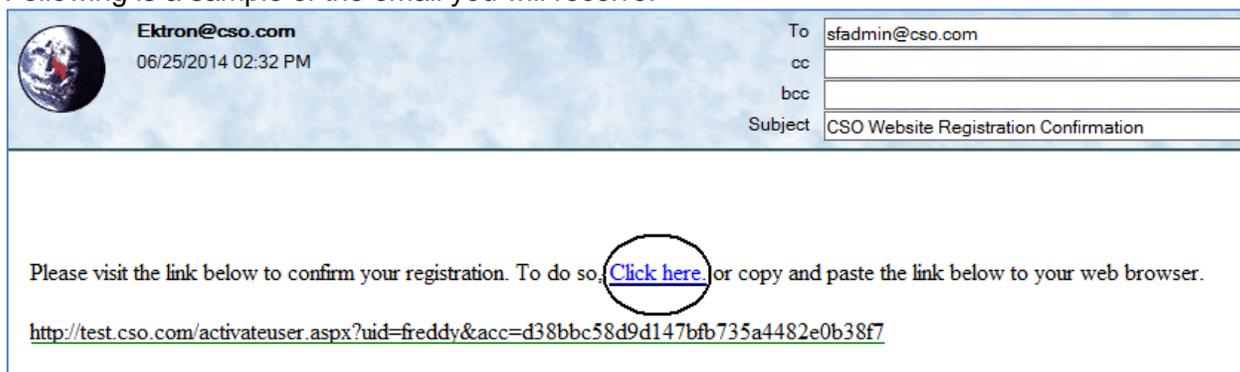
- **First Time Users**
  - Select 'New Users Click Here to Register'
  - Complete the information on the registration form

First Name:	<input type="text" value="Fred"/>	
Last Name:	<input type="text" value="Flintstone"/>	
E-Mail Address:	<input type="text" value="fred@anydealer.com"/>	Activation link will be sent to this e-mail address
Account No:	<input type="text" value="1234567890"/>	
State Abbr:	<input type="text" value="NE"/>	
User Name:	<input type="text" value="freddy"/>	
Password:	<input type="password" value="••••••••"/>	8 or more characters
Verify Password:	<input type="password" value="••••••••"/>	
<input type="button" value="Register"/>		

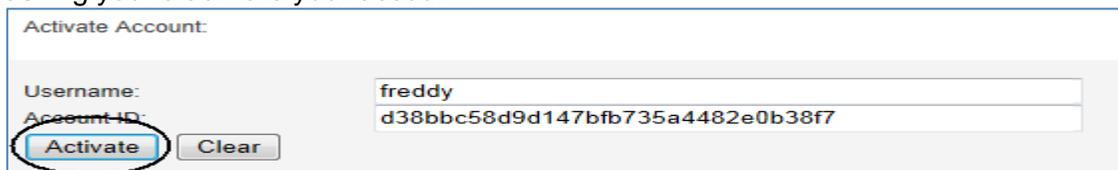
- Enter your First and Last Name in the appropriate fields.
- Enter a valid email address.
- Enter your CSO account number and state. If you have more than one number, enter one valid combination to register. You can add additional account numbers to your profile after you log in.
- You may select a Username of your choice.
- The password must contain at least 8 characters.
- Click Register after all information is completed. Once the account information is verified, a message will appear indicating the registration is almost complete.
- An email will be sent to you to finish the registration process.



- Log into your email account.
- Following is a sample of the email you will receive.

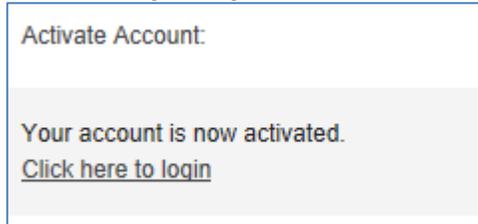


- The easiest way to confirm your registration is to 'Click Here'. You can also copy and paste the link in the email to your web browser.
  - Once you click on the link, your web browser will open and the following window will display asking you to activate your account.



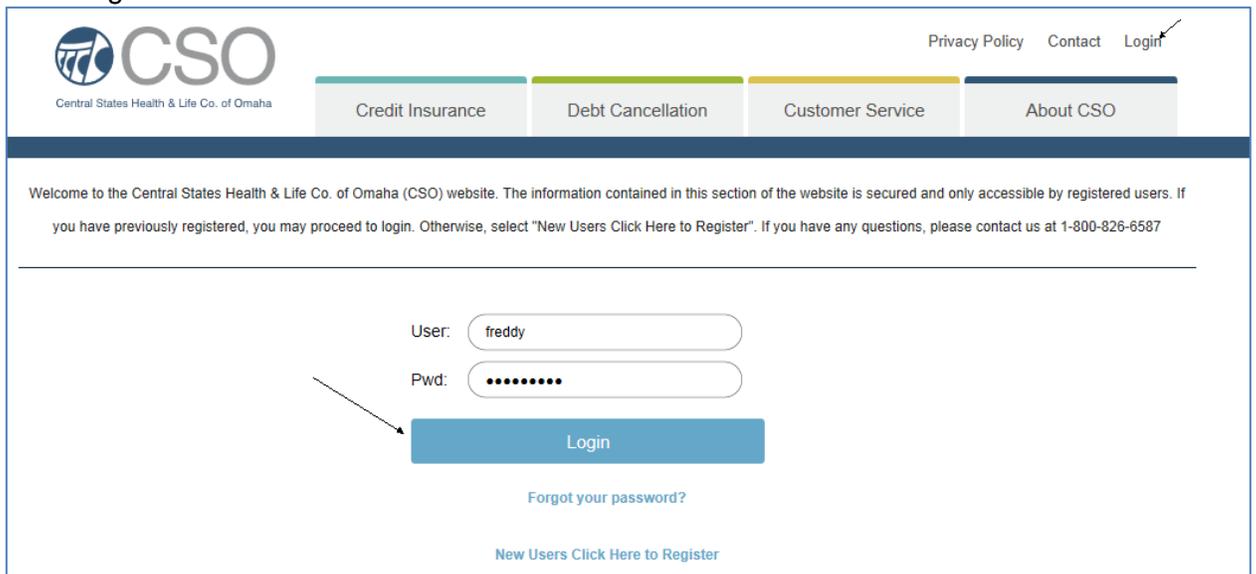
- Once you click Activate, a message will display indicating your account has been activated.

- If you want to log in at this time, you can select 'Click here to login'. This will direct you to the main login page. See instructions under '**Registered Users**'.

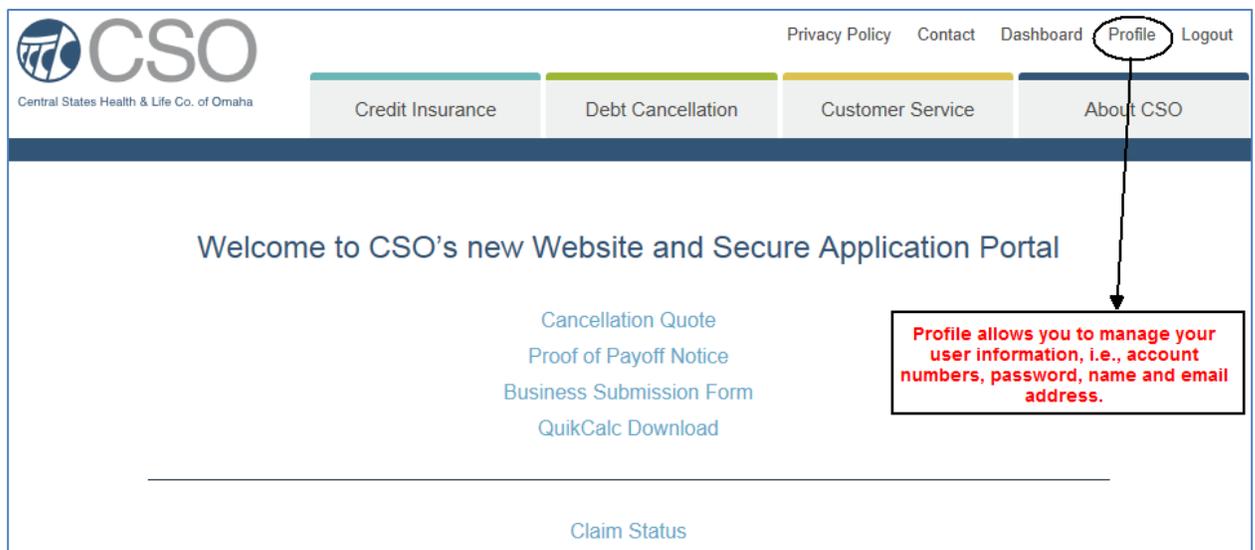


- **Registered Users**

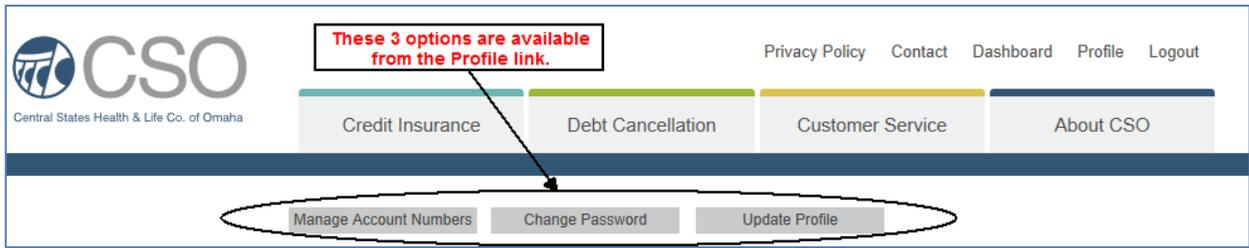
- Click on Login in the upper right corner of the home page.
  - On the Login screen, enter your username and password.
  - Click Login.



- Once you are logged in, a list of applications available to you will be displayed on the Secure Application Portal.



- **Profile** allows you to manage your account numbers, change your password, or update your name or email address.



- **Add or Remove Account Numbers**

- Select Manage Account Numbers under the Profile link to view the account numbers associated with your username.

**Manage Account Numbers for: ACCTTEST**

+ Add new record

		User Name	Account No	State	Account Type	Account Name
X	<a href="#">Edit</a>	ACCTTEST	5566778	ID	Debt Cancellation	ABC Motors
X	<a href="#">Edit</a>	ACCTTEST	9876543210	TX	American Heritage	ABC Chevy
X	<a href="#">Edit</a>	AcctTest	1234567890	TX	Credit Insurance	ABC Chevy

- To Add Additional Account Numbers

- Select Add New Record

- Enter the Account Number and State that you want to add to your profile.

- If the account number and state combination are correct, the number will be added to the list displayed on the Manage Account Numbers screen. If the account number and state are incorrect, a message will appear indicating Invalid Account/State Combination.

- To Remove an Account Numbers

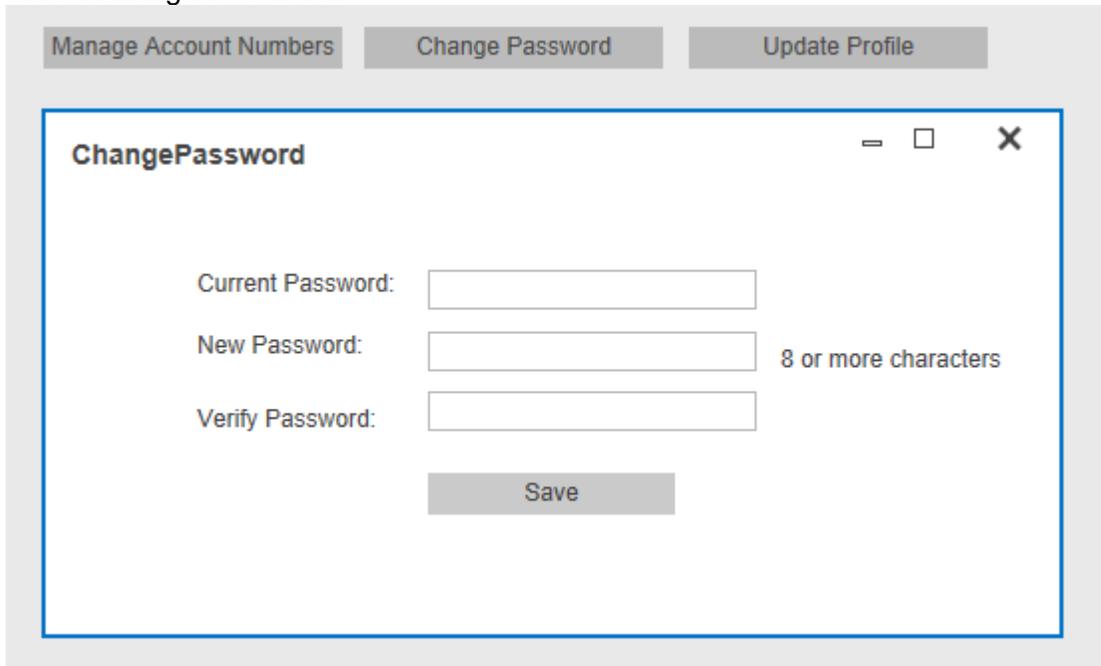
- From the list of accounts on the Manage Account Numbers screen, click on the X preceding the number you want to remove.

**Manage Account Numbers for: ACCTTEST**

+ Add new record

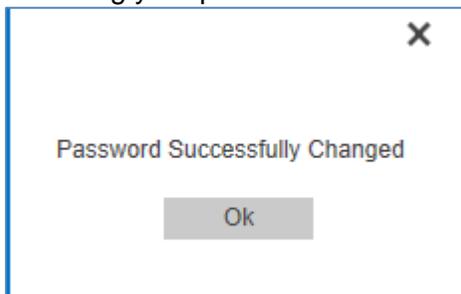
		User Name	Account No	State	Account Type	Account Name
X	<a href="#">Edit</a>	ACCTTEST	5566778	ID	Debt Cancellation	ABC Motors
X	<a href="#">Edit</a>	ACCTTEST	9876543210	TX	American Heritage	ABC Chevy
X	<a href="#">Edit</a>	AcctTest	1234567890	TX	Credit Insurance	ABC Chevy

- **To Change Your Password**
  - Select Change Password.

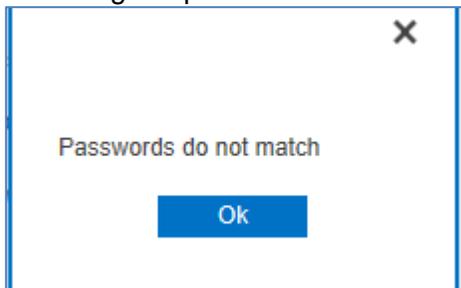


The screenshot shows a web application interface with three tabs: "Manage Account Numbers", "Change Password", and "Update Profile". The "Change Password" tab is active. Below the tabs is a window titled "ChangePassword" with standard window controls (minimize, maximize, close). Inside the window, there are three input fields: "Current Password:", "New Password:", and "Verify Password:". To the right of the "New Password:" field, there is a requirement: "8 or more characters". Below the input fields is a "Save" button.

- Enter your Current Password
- Enter your New Password
- Verify Password by entering the new password again.
  - If the Verify Password matches the New Password entered, a message will appear indicating your password has been successfully change.

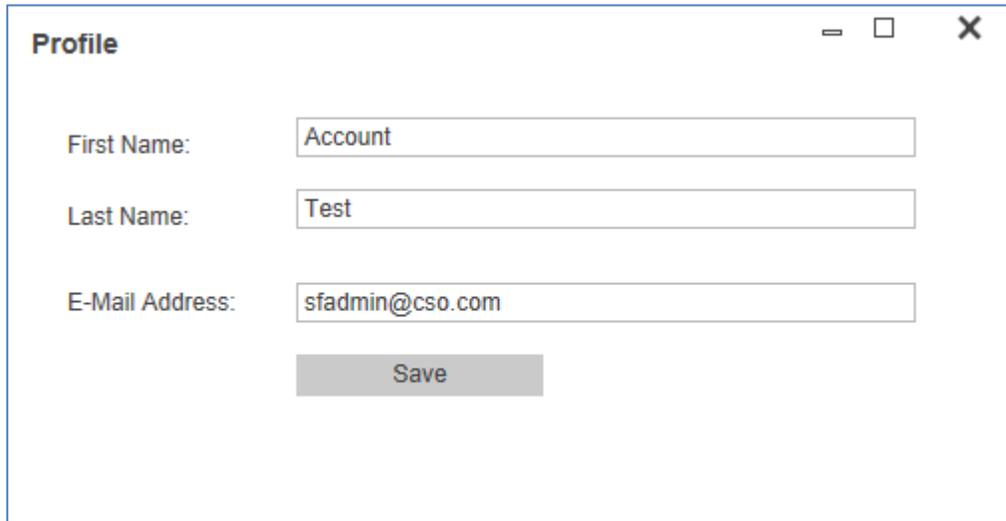


- If the Verify Password does not match the New Password, a message will appear indicating the passwords do not match.



- **To Change Your Personal Information**

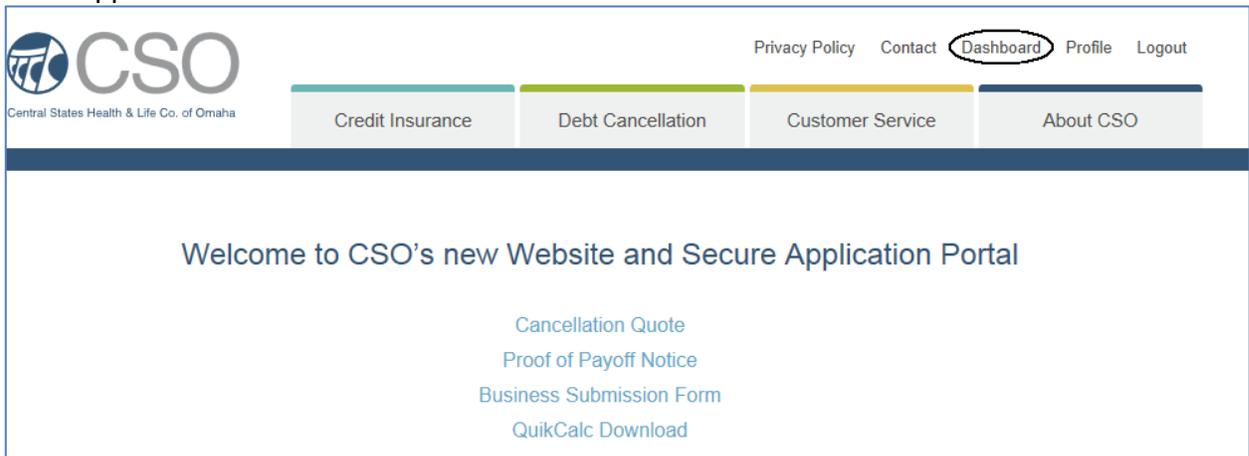
- Click on Update Profile to change or correct your:
  - First Name
  - Last Name
  - Email Address
- If your name or email address has changed, enter the new information in the corresponding field.
- Select Save.



The screenshot shows a web browser window titled "Profile". It contains three text input fields: "First Name:" with the value "Account", "Last Name:" with the value "Test", and "E-Mail Address:" with the value "sfadmin@csso.com". Below the fields is a grey "Save" button.

- **To Return to the Secure Application Portal**

- As long as you are still logged into the website, click on Dashboard from any page to return to the list of applications.



- **To Logout**

- To properly exit the Secure Application Portal, click on Logout at the upper right corner of the screen.

