



Colorado.gov

Customer Administrator Account Management

User Manual

Version 2.0

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Overview

1.1 WELCOME

Welcome Customer Administrator. This manual will show you how to manage your account with Colorado Interactive including changing account information, billing information and managing your users. This information is also available on our Registered Services site. All account management is done through our Customer Database. (CDB)

Access Registered Services Page:

<http://www.colorado.gov/registration/>

Log into Customer Data Base (CDB):

<https://cmbs-admin.soltn.cdc.nicusa.com/co/cust-admin/login.html>

1.2 CUSTOMER SUPPORT

Phone

303-534-3468

Toll free: 800-970-3468

(Available Monday – Friday, 8:00 am – 5:00 pm)

Email

support@www.colorado.gov

Mail

Colorado Interactive

600 17th Street, Suite 2150 South

Denver, CO 80202

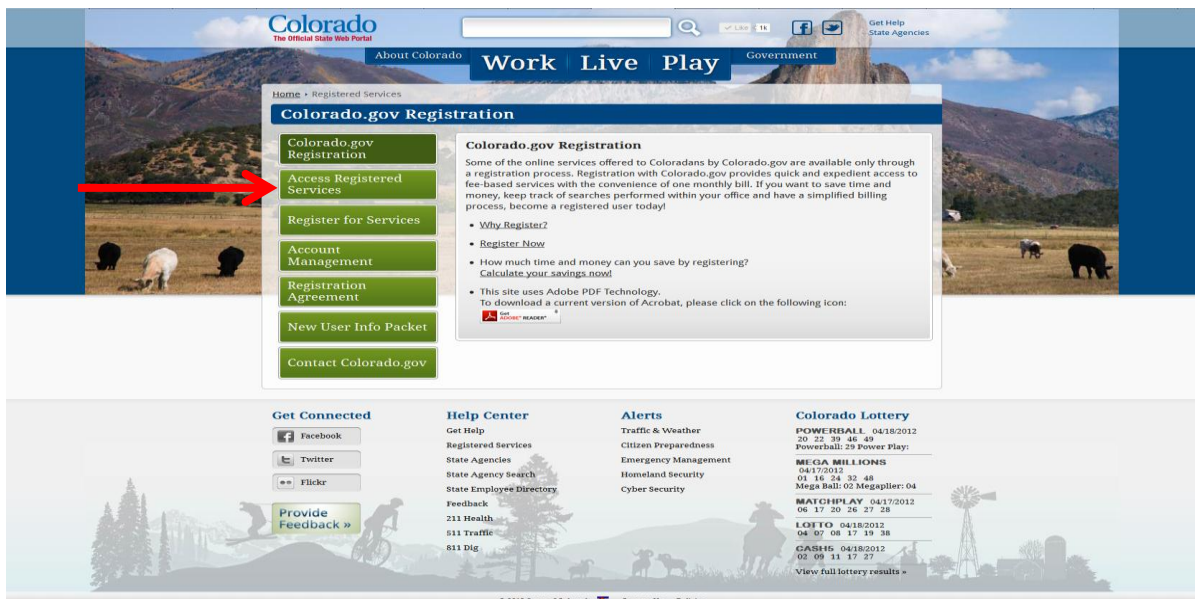
2 Adding a User

This function allows the Customer Administrator to add a new user at anytime. The Customer Admin will issue a username and password to the new user. At that point the Customer Administrator will fax the activation form Colorado Interactive to activate that user.

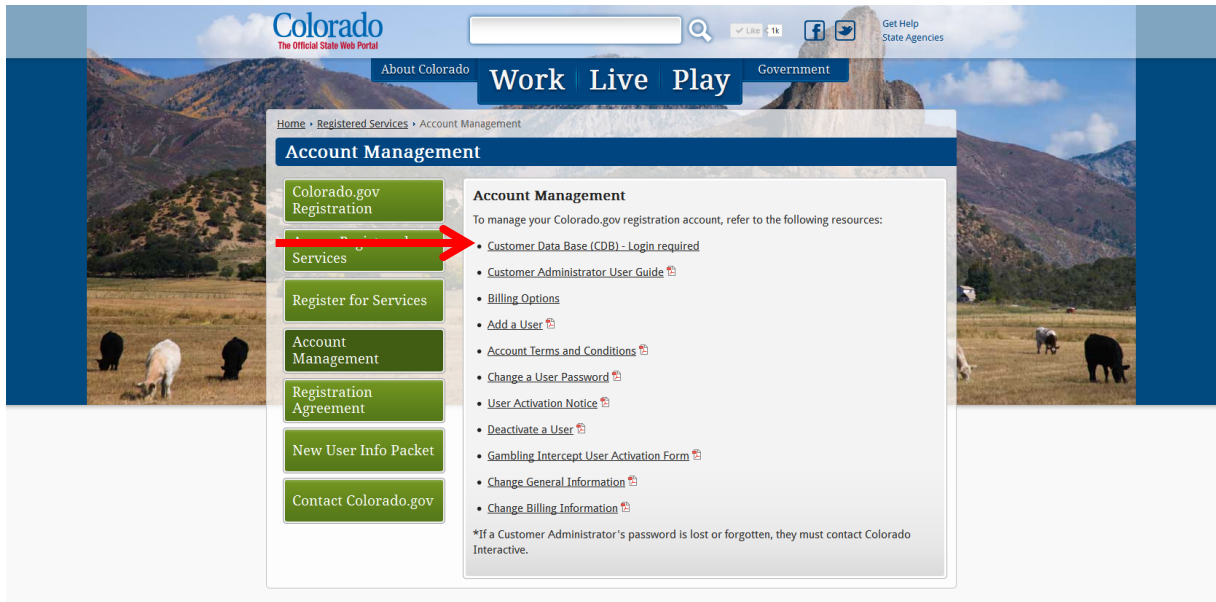
2.1.1 Colorado.gov Homepage-Access the Registered Services page




2.1.2 Registered Services Page-Access Account Management page



2.1.3 Registered Services Page-Access Customer Data Base (CDB)



2.1.4 Log into CDB (Customer Data Base)-Enter username and password

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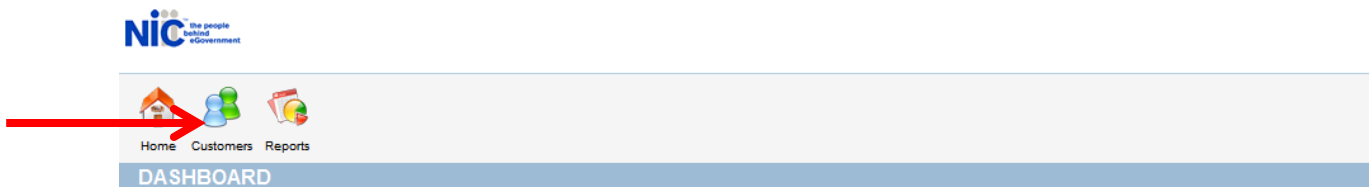
Login to Your CDB Account

Login:

Password:

[Forgot my password](#)

Login

2.1.5 Select Customer

2.1.6 Select Users

CUSTOMER SUMMARY
Home > Customers > Customer Summary

Customer Information

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-7890
Contact Email:	johnsmith@abccompany.com	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main Denver, CO USA
NIC Customer;		Secondary NAICS Code:	
Status Changed;	08/27/2009		
Primary NAICS Code:			

Aging Information

Balance	0-30 Days	31-60 Days	61-90 Days

Address Information

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

Phone Information

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

2.1.7 Select Add User

USERS
Home > Customers > Customer Summary > Users

Customer Information

Customer Name:	ABC Company	Customer Number:	100361
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Total records: 2

Login	Name	Login Type	Email	Phone	Status	
jdoe	Jane Doe	User			Inactive	New Password
jsmith	John Smith	Customer Admin	johnsmith@abccompany.com		Active	New Password

First | Previous | Next | Last

page 1 of 1

[Add User](#) [Add Multiple](#)

2.1.8 User Details

Please fill in user information and choose Submit.

ADD USER
Home > Customers > Customer Summary > Users > Add User

Customer Information
Customer Name: ABC Company Customer Number: 100361

Add User
ID:
Login: * (Login should be at least 4 alphanumeric characters.)
Password: *
First Name:
Last Name:
Email:
Status: *

The following section is optional, but if data is entered into this section the fields with an * are required.

Address Information
Address 1: *
Address 2:
City: *
State/Province: *
Postal Code: *
Country:

The following section is optional, but if data is entered into this section the fields with an * are required.

Phone Information
Main: *
Secondary Phone:
Fax:
Mobile:
Pager:
Alternate Number 1: Description:
Alternate Number 2: Description:

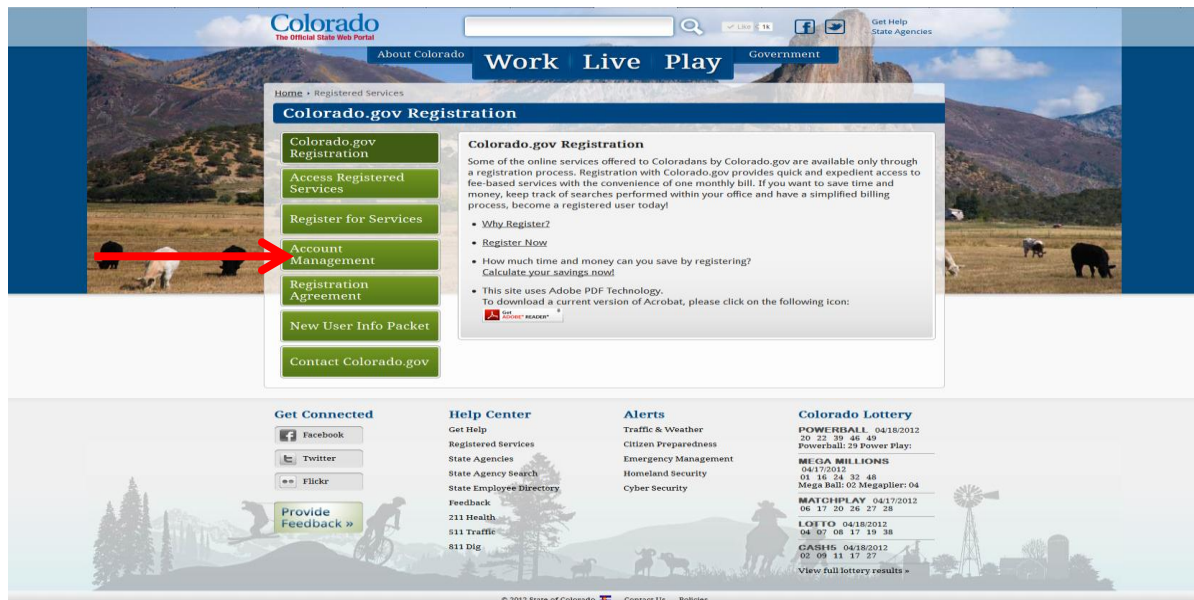
3 Deactivate User

This function allows the Customer Admin to deactivate any user at any time.

3.1.1 Colorado.gov Homepage-Access Registered Services page



3.1.2 Registered Services Page-Access Account Management Page



3.1.3 Log into CDB (Customer Data Base) –Enter your username and password

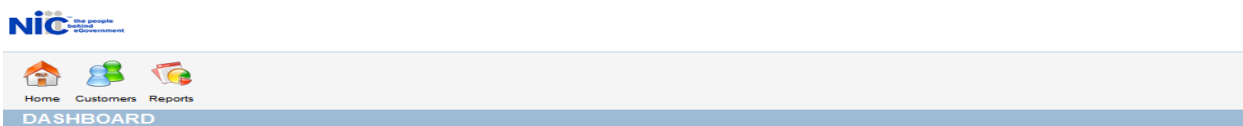


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Login to Your CDB Account

Login:

Password:

[Forgot my password](#)

3.1.4 Select Customer**3.1.5 Select Users**


Home Customers Reports

General Information
Billing Information
Users
Pay Online

CUSTOMER SUMMARY

Home > Customers > Customer Summary

Customer Information

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-7890
Contact Email:	johnsmith@abccompany.com	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main Denver, C USA
NIC Customer:		Secondary NAICS Code:	
Status Changed:	08/27/2009		
Primary NAICS Code:			

Aging Information

Balance	0-30 Days	31-60 Days	61-90 Days

Address Information

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

Phone Information

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

3.1.6 User Deactivation

Find the user you wish to deactivate in user list and click on their 'Active' link once as shown below.

The screenshot shows the 'USERS' section of the Colorado.gov Customer Administrator Account Management 2.0 interface. The page displays a list of users for 'ABC Company' (Customer Number: 100361). The list includes two users: Jane Doe (User) and John Smith (Customer Admin). A red arrow points to the 'Active' link for John Smith, indicating the action to be taken for deactivation.

Login	Name	Login Type	Email	Phone	Status	
jdoe	Jane Doe	User			Active	New Password
jsmith	John Smith	Customer Admin	johnsmith@abccompany.com		Active	New Password

The page will automatically refresh and display the user as 'Inactive'.

The screenshot shows the 'USERS' section of the Colorado.gov Customer Administrator Account Management 2.0 interface after the deactivation action. The list of users now shows John Smith's status as 'Inactive', while Jane Doe remains 'Active'. A red arrow points to the 'Inactive' status for John Smith, indicating the result of the deactivation.

Login	Name	Login Type	Email	Phone	Status	
jdoe	Jane Doe	User			Inactive	New Password
jsmith	John Smith	Customer Admin	johnsmith@abccompany.com		Active	New Password

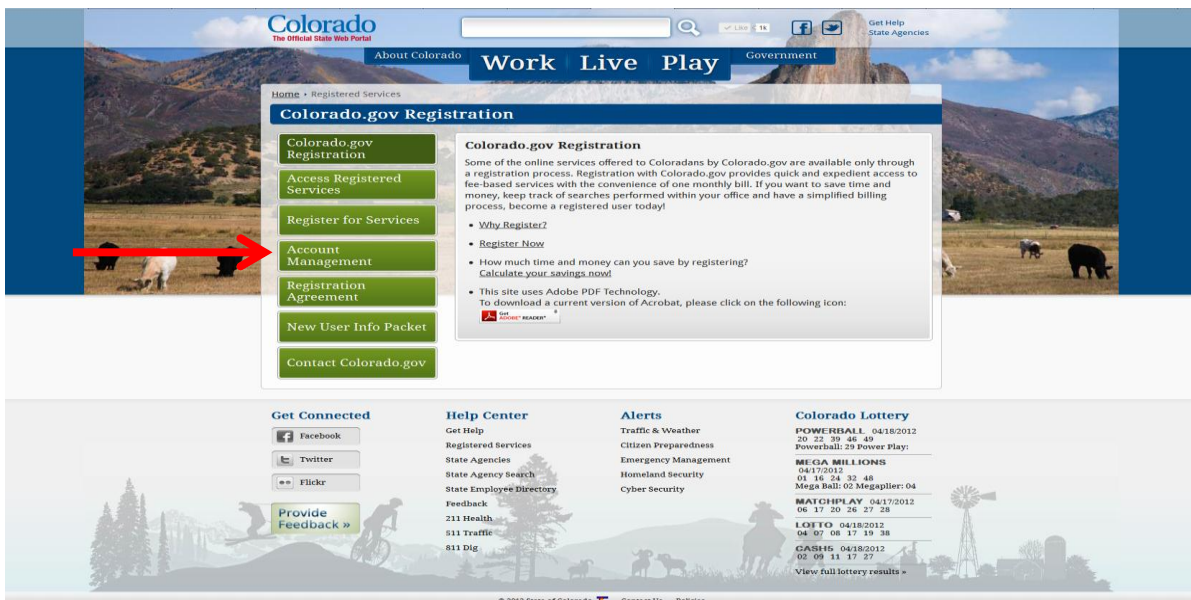
4 Change Password

This function allows the Customer Admin to change any user's password at anytime.

4.1.1 Colorado.gov Homepage-Access Registered Services page



4.1.2 Registered Services Page-Access Account Management Page



4.1.3 Log into CDB (Customer Data Base) –Enter your username and password

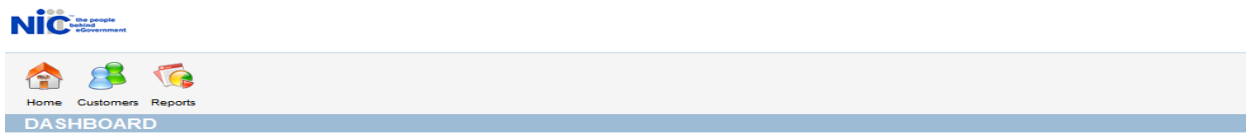
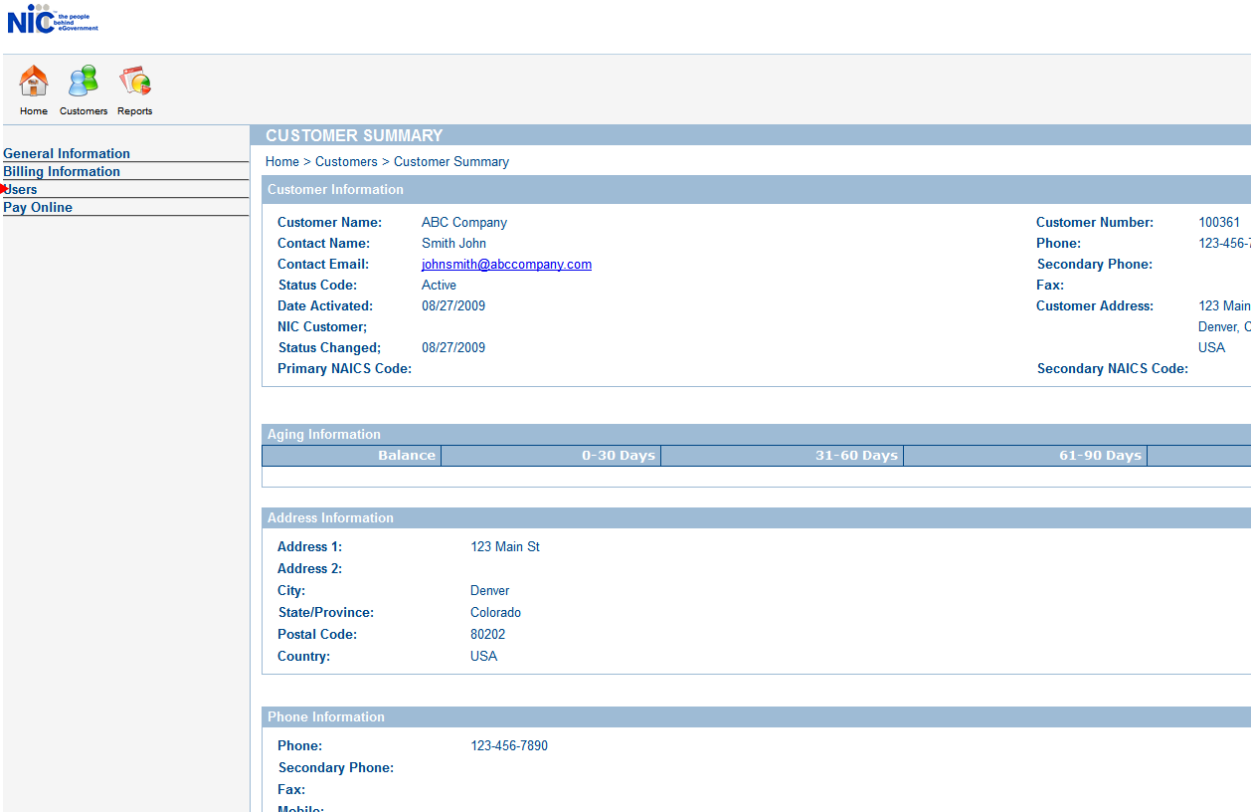

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Login to Your CDB Account

Login:

Password:

[Forgot my password](#)

4.1.4 Select Customer**4.1.5 Select Users**


The screenshot shows the NIC dashboard with the 'Users' menu item highlighted by a red arrow. The dashboard includes the NIC logo, navigation links (Home, Customers, Reports), and a sidebar menu with the following items: General Information, Billing Information, Users (highlighted), and Pay Online. The main content area displays the 'CUSTOMER SUMMARY' for a customer named ABC Company.

CUSTOMER SUMMARY
Home > Customers > Customer Summary

Customer Information

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-7890
Contact Email:	johnsmith@abccompany.com	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main Denver, C USA
NIC Customer:		Secondary NAICS Code:	
Status Changed:	08/27/2009		
Primary NAICS Code:			

Aging Information

Balance	0-30 Days	31-60 Days	61-90 Days

Address Information

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

Phone Information

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

4.1.6 Changing Users Password

Locate the user from the list that you wish to reset the password for and click their 'New Password' link

The screenshot shows the 'USERS' section of the Colorado.gov Customer Administrator Account Management interface. The user 'jamith' is highlighted, and a red arrow points to the 'New Password' link next to their name.

Login	Name	Login Type	Email	Phone	Status	
jdoe	Jane Doe	User			Active	New Password
jamith	John Smith	Customer Admin	johnsmith@abccompany.com		Active	New Password

4.1.7 Reset Password Confirmation

A window will open with a new password, note the password and close the window. Be advised that once you close that window you will no longer be able to see the password and will have to reset it again.

The screenshot shows the 'USERS' section of the Colorado.gov Customer Administrator Account Management interface. A red arrow points to the 'New Login Password' dialog box, which displays the login name 'jdoe' and a masked password.

Login	Name	Login Type	Email	Phone	Status	
jdoe	Jane Doe	User			Active	New Password
jamith	John Smith	Customer Admin	johnsmith@abccompany.com		Active	New Password

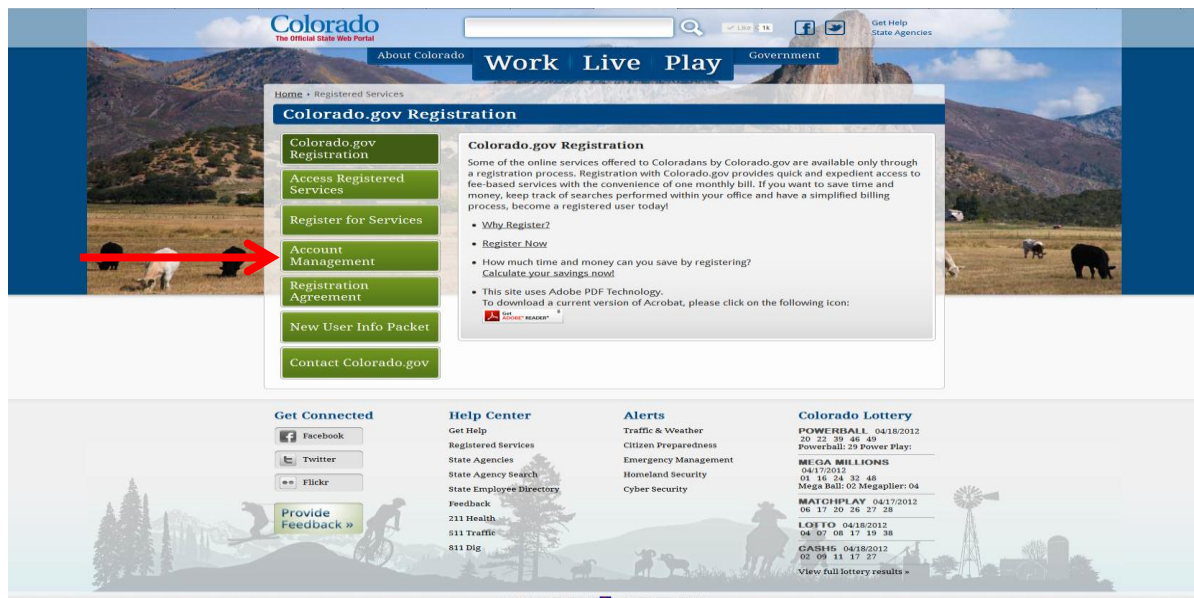
5 Change General Information

This function allows the Customer Admin to change the general information for the company such as contact information.

5.1.1 Colorado.gov Homepage-Access Registered Services page



5.1.2 Registered Services Page-Access Account Management Page



5.1.3 Log into CDB (Customer Data Base) –Enter your username and password



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Login to Your CDB Account

Login:

Password:


[Forgot my password](#)


5.1.4 Select Customer**5.1.5 Choose Modify Customer**


Home Customers Reports

General Information
Billing Information
Users
Pay Online




My Profile: [jsmith](#) 

Logout

CUSTOMER SUMMARY

Home > Customers > Customer Summary

Customer Information 

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-7890
Contact Email:	johsmith@abccompany.com	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main St Denver, CO 80202 USA
NIC Customer:		Secondary NAICS Code:	
Status Changed:	08/27/2009		
Primary NAICS Code:			

Aging Information

Balance:	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days

Address Information

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

The screen changes (as shown below) to allow user to make any desired changes. Once all changes have been made, please select the 'Submit' button at the bottom.

MODIFY CUSTOMER

Home > Customers > Customer Summary > Modify Customer

Customer Information

Customer Name:* ABC Company
Customer ID: 100361
Create Date: 08/27/2009
NIC Customer:
Status Code:* Active
First Name: John
Last Name:* Smith
Email:* johnsmith@abccompany.com
Primary NAICS Code:*
Secondary NAICS Code: Click to Modify NAICS Code

The following section is optional, but if data is entered into this section the fields with an * are required.

Address Information

Address 1:* 123 Main St
Address 2:
City:* Denver
State/Province:* Colorado
County: -- County --
Postal Code:* 80202
Country:* USA

The following section is optional, but if data is entered into this section the fields with an * are required.

Phone Information

Main:* 123-456-7890
Secondary Phone:
Fax:
Mobile:
Pager:
Alternate Number 1: Description:
Alternate Number 2: Description:

Submit

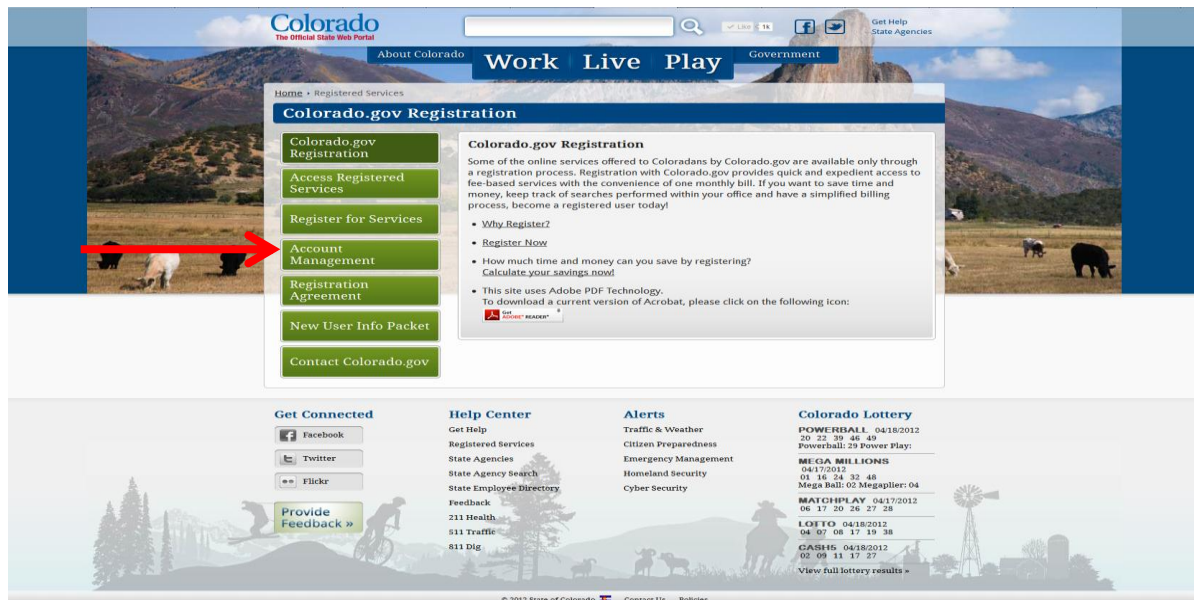
6 Change Billing Information

This function allows the Customer Admin to change the billing information for the account.

6.1.1 Colorado.gov Homepage-Access Registered Services page



6.1.2 Registered Services Page-Access Account Management Page



6.1.3 Log into CDB (Customer Data Base) –Enter your username and password

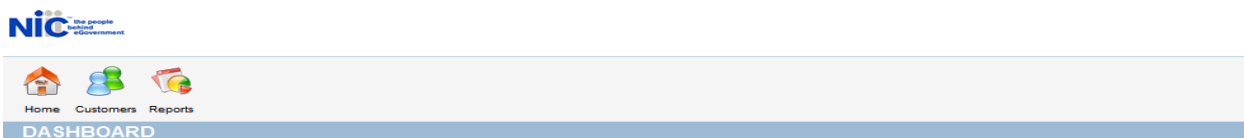
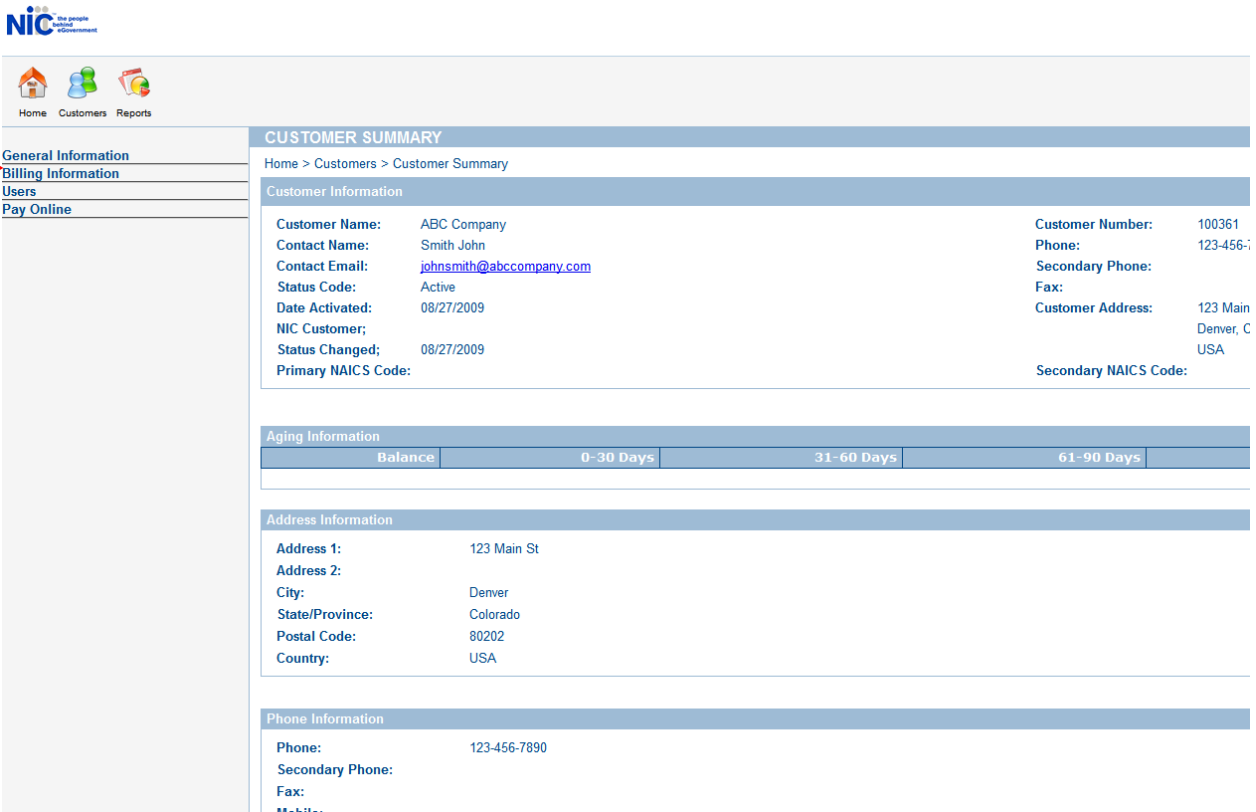

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Login to Your CDB Account

Login:

Password:

[Forgot my password](#)

6.1.4 Select Customer**6.1.5 Select Billing Information**


The screenshot shows the NIC Customer Summary page. A red arrow points to the 'Billing Information' link in the left sidebar. The main content area displays customer information for 'ABC Company'.

CUSTOMER SUMMARY
Home > Customers > Customer Summary

Customer Information

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-
Contact Email:	johnsmith@abccompany.com	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main Denver, C USA
NIC Customer;		Secondary NAICS Code:	
Status Changed;	08/27/2009		
Primary NAICS Code:			

Aging Information

Balance	0-30 Days	31-60 Days	61-90 Days

Address Information

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

Phone Information

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

6.1.6 Select Modify Billing

Colorado

Home Customers Reports

My Profile: [jsmith](#) Logout

BILLING INFORMATION

Home > Customers > Customer Summary > Billing Information

Customer Information [Modify Customer](#)

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-7890
Contact Email:	johnsmith@abccompany.com	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main St Denver, CO 80202 USA
NIC Customer:		Secondary NAICS Code:	
Status Changed:	08/27/2009		
Primary NAICS Code:			

Billing Information [Modify Billing](#)

Apply Minimum Billing: No

Waive Service Fee: No

Do Not Invoice: No

Is Prepay: No

Invoice Payment Terms: 20

Invoice Template: Service By Day

Option: Mailed Invoice

Address: John Smith
123 Main St
Denver, CO 80202
USA

Choose desired billing option and fill in the required information, once complete select the 'Submit' button.

Colorado

Home Customers Reports

My Profile: [jsmith](#) Logout

MODIFY BILLING INFORMATION

Home > Customers > Customer Summary > Billing Information > Modify Billing Information

Customer Information

Customer Name: ABC Company Customer Number: 100361

Credit Card Option

Credit Card:

Card Expiration Date: (mm/yyyy)

Card Type: -- Card type --

ACH Option (US Only)

Routing Number:

Account Number:

Account Type: -- Account Type --

Customer Type: -- Customer Type --

Bank Name:

Online Invoice Option

Email: ☐ Same as Main

Mailed Invoice Option

Customer Name: ABC Company ☒ Same as Main

First Name: John

Last Name: Smith

Address 1: 123 Main St

Address 2:

City: Denver

State/Province: Colorado

County: -- County --

Postal Code: 80202

Country: USA

[Submit](#)

7 Security Best Practices

7.1 SYSTEM MAINTENANCE

Maintain your systems with the most current security patches (aka Service Packs) from your system's vendor. This will close most of the known security holes. Limit the amount of services and applications you are running simultaneously. The more services running, the greater the risk of exposing the system to exploitation. Finally, remove any programs or applications not being used and defragment your hard drive on a regular basis to help your system's overall performance.

7.2 PASSWORD SECURITY

Never store password as plain text or write down on paper. Use encryption utilities if you have to store the password in a file for some reason. Do not share your password with your coworkers.