

User Guide For

Account Setup & Login

- ✓ Creating a Password
- ✓ Logging In
- ✓ Support

The logo for Clickserv, featuring the word "clickserv" in a bold, lowercase, sans-serif font. A horizontal line is positioned below the text, starting from the left and ending under the "v". A small "SM" trademark symbol is located to the right of the text. The logo is centered within a light blue circular background that is partially overlaid by a dark blue shape at the bottom of the page.

clickservSM

User Guide – Account Setup & Login

Purpose:

The purpose of this document is to provide guidance for logging in and entering an application on the external ClickServ portal.

Content:

- [Logging in to ClickServ](#)
- [Notifications](#)
- [Support](#)

Other Key Links:

- [Entering a Credit Application](#)
- [Application Inquiry](#)

Log In URL [Vendor Finance Portal \(clickservonline.com\)](https://clickservonline.com)



Creating a Password and Logging In

Welcome email to set up your ClickServ Account.

Please click “here” to begin the process.

NOTE: please login within 48 hours of receiving your welcome email.



Hi


Welcome to the ClickServ portal. To complete your profile, click [here](#) and create a password for your account. If you have any questions, please contact your sales representative.

Thank You
JCB Finance
655 Business Center Drive, Suite 250
Horsham, PA 19044


- Using the URL provided to you (clickservonline.com), create your password.
- Please use the following criteria:
 - ✓ Password must be at least 8 characters
 - ✓ Must include at least 1 uppercase letter
 - ✓ Must include at least 1 number
 - ✓ Must include at least 2 letters
 - ✓ Must include 2 special characters (#@\$)
 - ✓ Must include at most 2 repeat characters
- An example is Pass12#\$

Create your account

Email Address

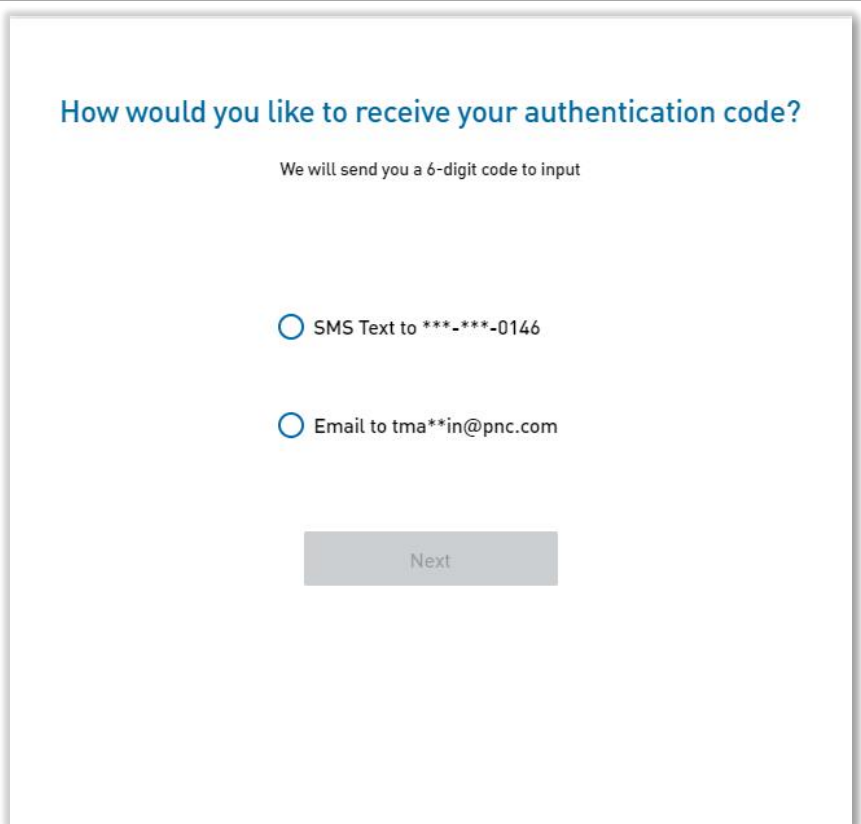
Create Password 

- must be at least 8 characters
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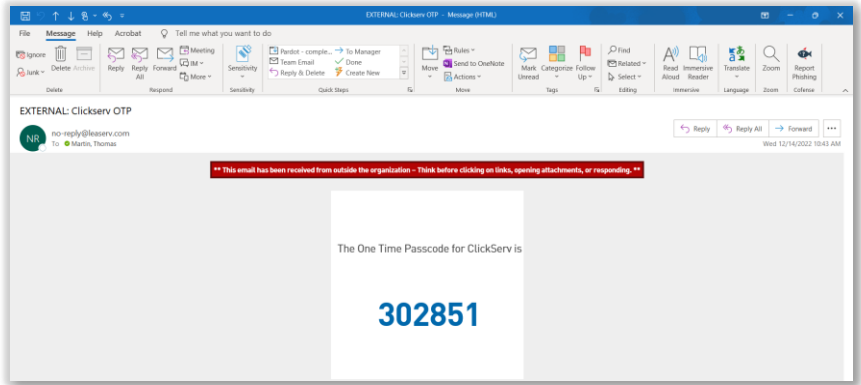
Confirm Password 

Create Account

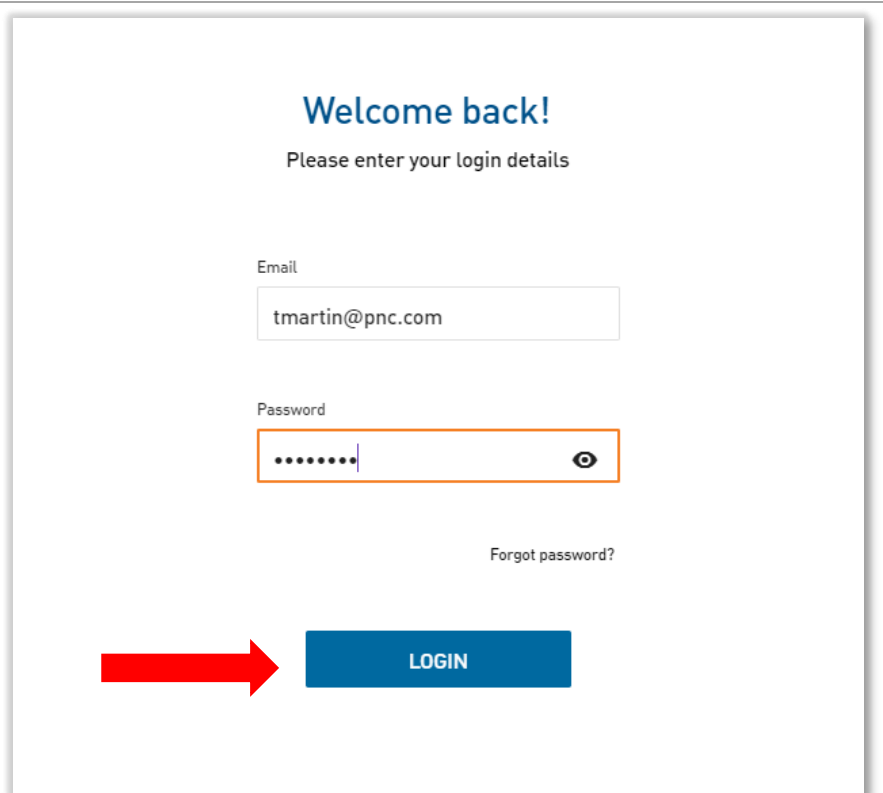
- The first time you log in, you will be required to complete a dual authentication. The authentication code can be received via your email or mobile phone number associated with your account.
- This dual-factor authentication is only needed the first time you log in, unless:
 - You are logging in from a different location, or
 - Device
- The next screenshot shows how you will receive your code via your email.



- Sample of Authentication Code



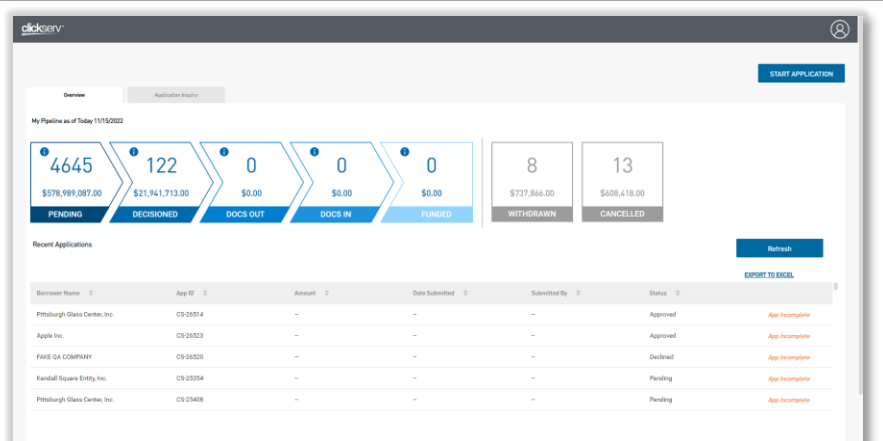
- Once you create/update your password you will be taken to this page to enter your credentials
 - Your email address
 - The password that you created
- Click on the Login Button
- You will then go to your landing page (see next screen)



The screenshot shows a login page with the heading "Welcome back!" and the instruction "Please enter your login details". There are two input fields: "Email" with the value "tmartin@pnc.com" and "Password" with masked characters. A "Forgot password?" link is located below the password field. A red arrow points to a blue "LOGIN" button.

This is the landing page, which will show the number of applications and the total dollar amount for: (The landing page can be customized for individual or multiple users at your dealership. If you are set up for multiple users, you will see all ClickServ apps from your dealership.)

- **Pending** – applications that you have previously submitted, but not decided by credit
- **Decisoned** – applications that have been decided by Credit
- **Docs Out** – documents have been sent to you
- **Docs In** – documents have been returned and are in review
- **Funded** – applications that have been booked and funded





Support:

For additional support, please contact your JCB Finance Manager, or Tom Martin @ 610-909-0146