User Manual

GreenF rm

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GreenForm overview
GreenForm is a web-based capture solution which digitalises paper-based business processes and automates forms data capture by eliminating repetitive input.

Meniko's GreenForm web application can capture content from several external and internal devices that include, Meniko's Greenbox, document scanner, camera, signature pads and fingerprint readers. It can also reduce the overall cost of capture and increase the quality and value of enrolment data.

What are forms and what are they used for?
A digital form is a computer version of a paper form. Besides eliminating the cost of printing, storing, and distributing pre-printed forms, digital forms can be filled out faster as they can automatically format, calculate, look up, and validate information for the user.

How do I obtain a user login/ access to forms in my company?
The administrator of your account will give you the log-in information you need to access your account as well as access to all the forms that are relevant to you.

What do I need to access GreenForm?
To be able to access GreenForm, you'll need
- Internet connection
- Valid user log-in
- Supported devices – the screen size of the mobile device must be 5 inches and more
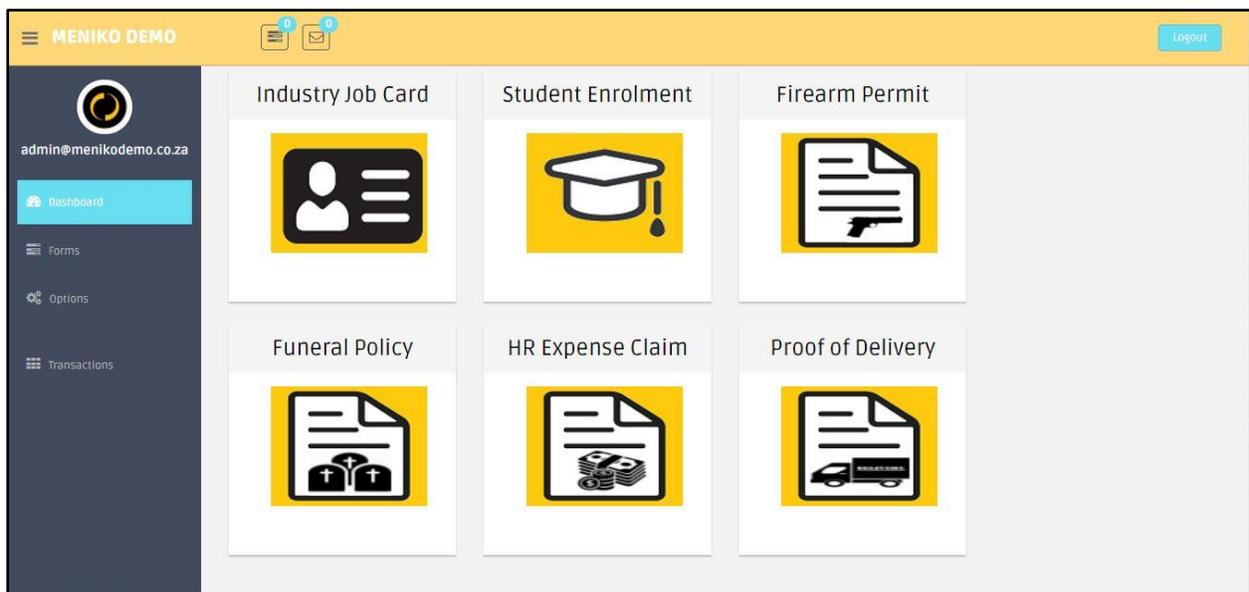- Google chrome – this is the browser GreenForm is most compatible with

GETTING STARTED

Log onto www.greenform.co.za. It will take you to the sign-in page where you enter your log-in details:
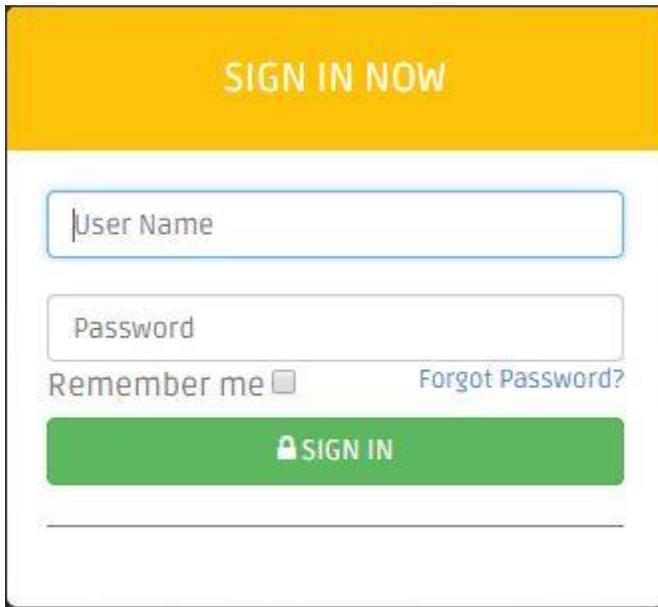
Logging in

Once you log-in, you'll land on the main page with all the tools you need to navigate your transactions:

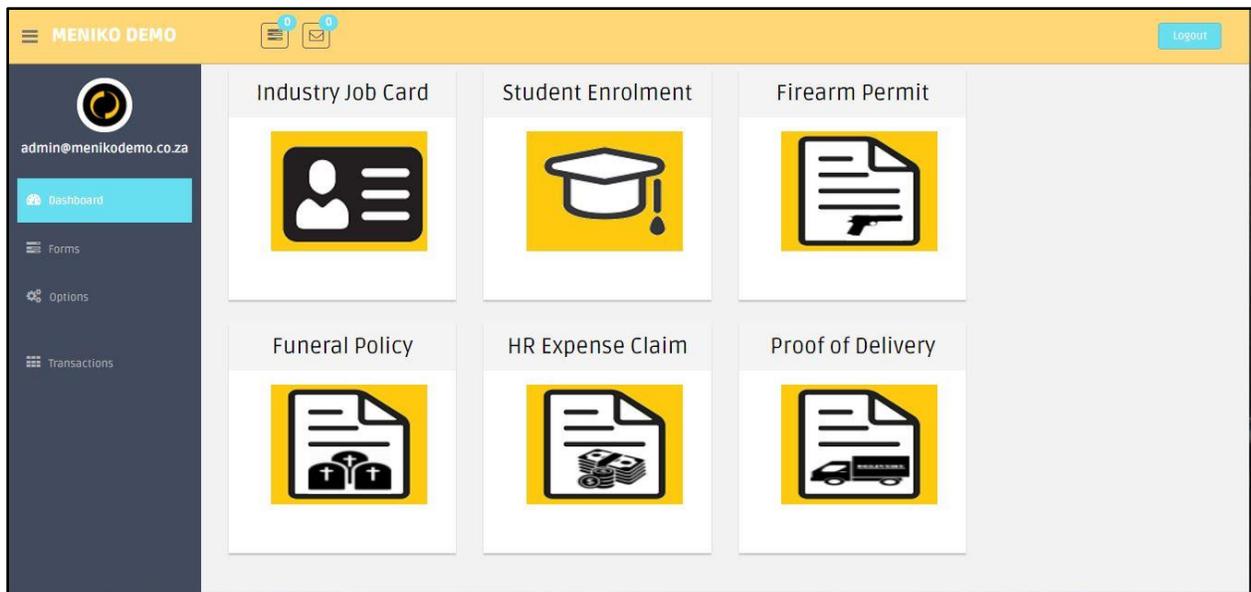On mobile, your landing page will appear this way:
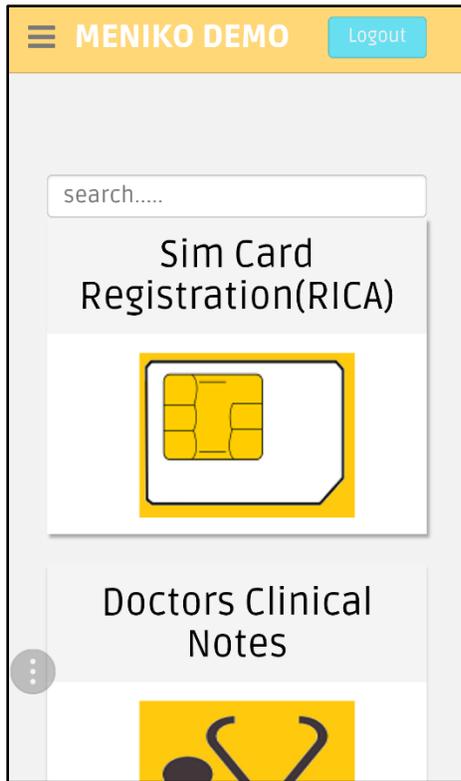
The main page has a list of forms with their logos. Click on the form that applies to you:

On mobile:
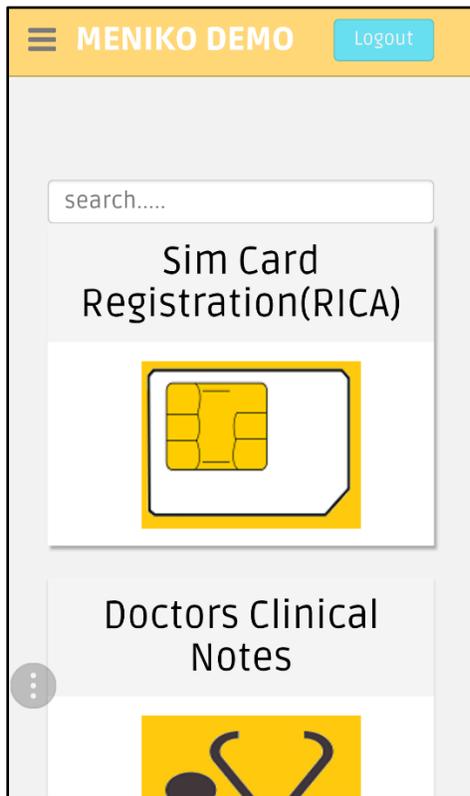
What happens if I can't find my form?

If you can't immediately find your form, there's now a search option button to look for your form:

As you type in the name of your form, name suggestions pop up to help you find it easier. Locate your form, click on it and start transaction:
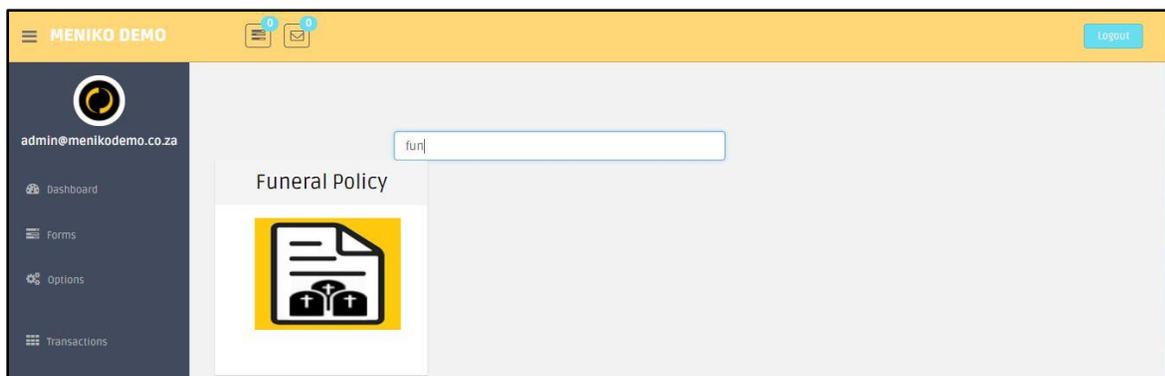
On mobile:
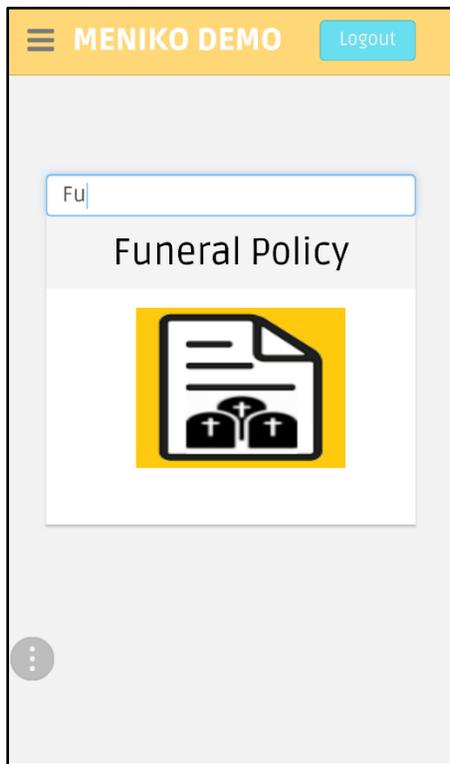
Alternatively, you can choose your specific form from the list of forms on the left-hand side of the dashboard. Click on the *'Forms'* button and scroll down to the form you need:

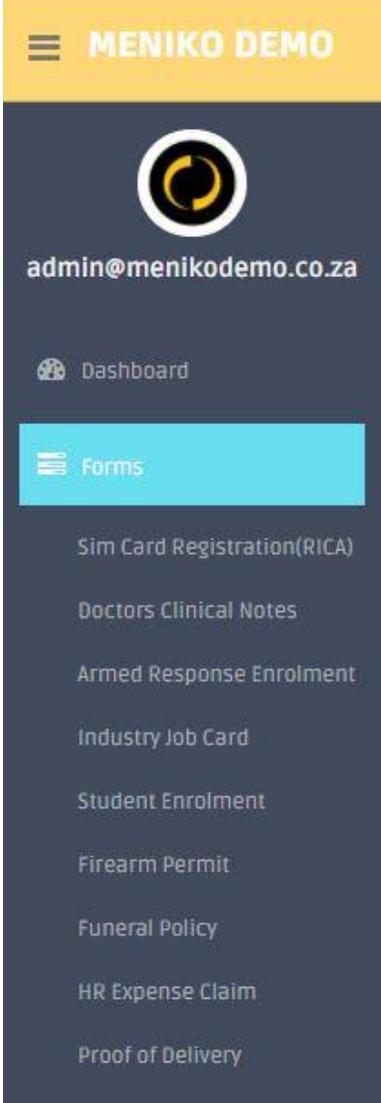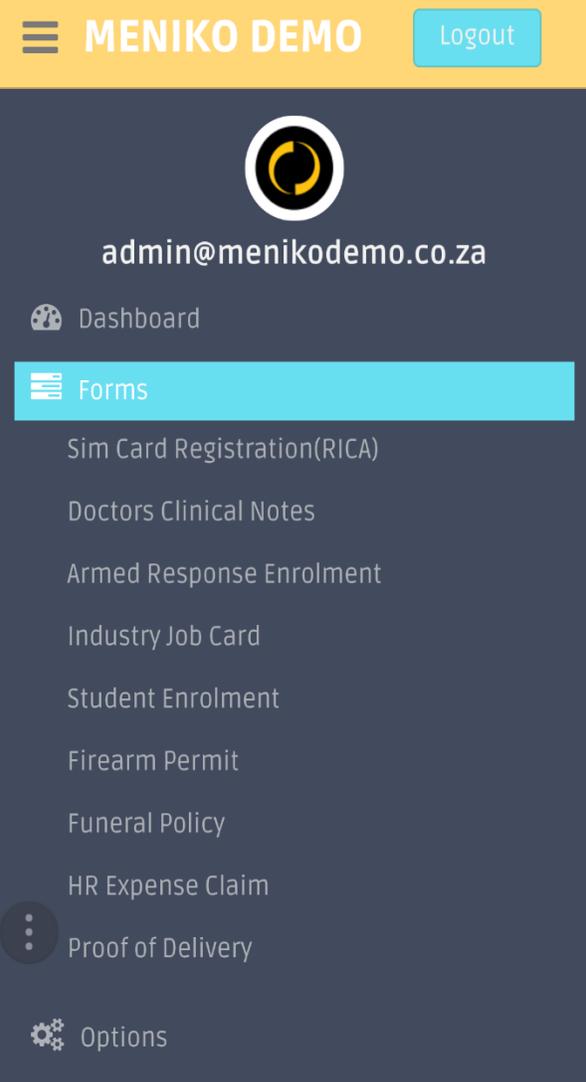| On PC or Tablet	On mobile
☰ **MENIKO DEMO** ⭕ **admin@menikodemo.co.za** 🎨 Dashboard ☰ Forms Sim Card Registration(RICA) Doctors Clinical Notes Armed Response Enrolment Industry Job Card Student Enrolment Firearm Permit Funeral Policy HR Expense Claim Proof of Delivery	☰ **MENIKO DEMO** Logout ⭕ **admin@menikodemo.co.za** 🎨 Dashboard ☰ Forms Sim Card Registration(RICA) Doctors Clinical Notes Armed Response Enrolment Industry Job Card Student Enrolment Firearm Permit Funeral Policy HR Expense Claim ⋮ Proof of Delivery ⚙ Options

Completing a form

Select the form you want to use and fill in the required fields.

This is how your form will look on mobile:

Make sure to fill in all the mandatory fields. Once you enter your South African ID number, the form can automatically bring up your details. **The system has ID look-up and form data pre-population. It verifies if your ID number is in the correct format and validates your name, surname and birth date using external data providers**.

If your information doesn't automatically load, refresh the page and try again. You can also just fill in the information manually.

SIGNATURE
How to sign
Like you would on a hard copy, once you're done filling in the form, you'll need to sign to validate the form:

On PC/Tablet

On mobile:

Click on the signature box then sign. On your mobile, you can sign the form using a stylus. However, there are some devices that don't support the use of a stylus so you can use your fingers to sign.

What happens if I 'clear signature'?

If you're unhappy with the way you signed, click the *'clear signature* button (shown below), it will clear your signature then you can sign again.
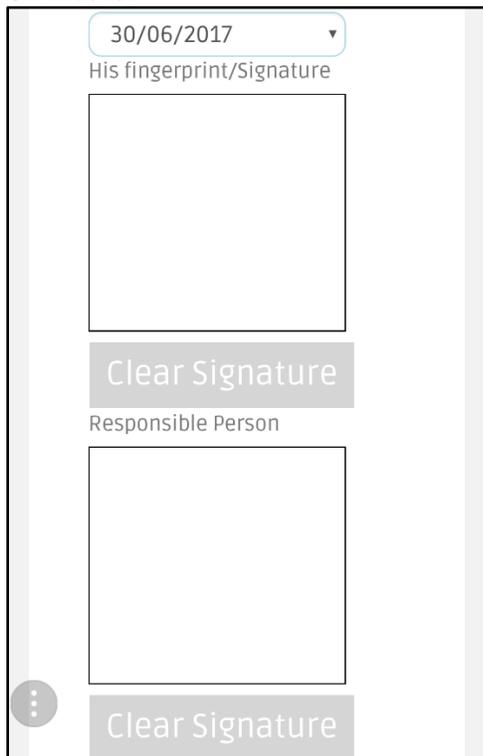
Clear Signature

TAKING PHOTOS

You can now also capture and upload a photo for your files:

Choose File | No file chosen | X
Uploading File, please wait
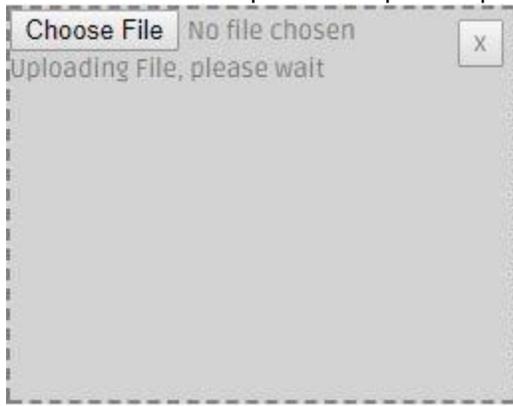
Simply click to start the camera and upload your photo. On mobile, you have the option to take a new image or upload an already existing one. Click on browse, go to your server and upload:

Choose File | No file chosen | X
Uploading File, please wait

Choose File | No file chosen | X
Uploading File, please wait
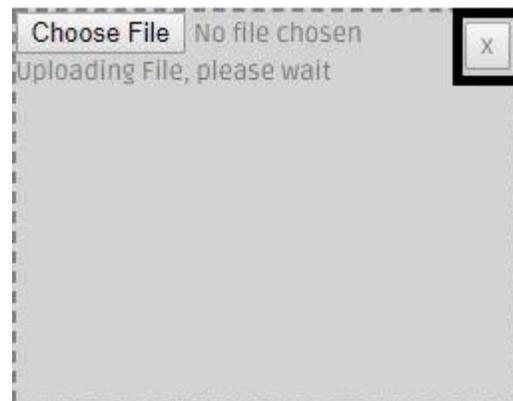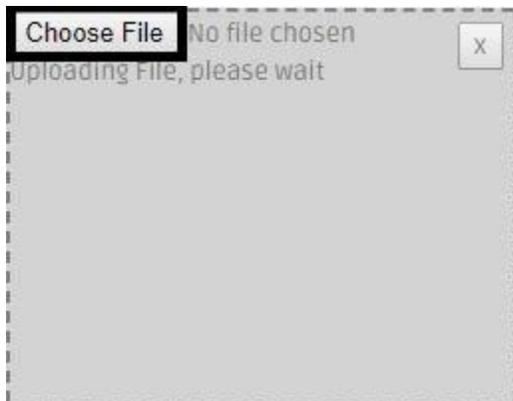
UPLOADING DOCUMENTS

Just like you would on a PC, there's an option to upload personal documents needed to conclude your transaction on a mobile device.

9. SUPPORTING DOCUMENTS
Provide the following verification documentation for the Identity of the Policyholder

Select Supporting Documents ▾

Save Draft   **Submit**

Choose your respective document and upload. You also have the option to save a draft of your form and finish it at a later stage.

What documents can I attach?
This depends on the nature of the business request as you can attach any document that's required to finalise the process. You can attach a variety of documents that include among others:

- IDs
- passport
- driver's license
- bank statement
- CV
- images
- proof of residence
- proof of income

How do I upload?
Select the document you want to upload, click on it and you'll get an option to browse your server for the respective document then upload.

What happens if I struggle to upload?
If for some reason you fail to upload your documents, reload the page and try again. If you still can't upload, contact your administrator who will be able to help you.

FINGERPRINT ENROLMENT
GreenForm also allows fingerprint registration. This means that your fingerprint will be captured and stored in the system:

Student Fingerprint

Click to start fingerprint reader

You will, however, need to be connected to a fingerprint reader to be able to use this function:

Student Fingerprint

No fingerprint reader available

NOTIFICATIONS PANEL
Notifications
Notifications are a great way to alert and track any of your activities. GreenForm now has a notification panel. It shows you what tasks you need to update and/or complete:

≡ MENIKO DEMO ➡ 📋⁰ ✉⁰   Logout

Messaging
GreenForm also has a message panel. This will be for communication purpose in case there are updates to the system or your forms:

≡ MENIKO DEMO 📋⁰ ✉⁰ ⬅   Logout

How to reset your password
If you've forgotten your password there's an option on the landing page to reset your password. Click on the *'forgot password'* link and enter your email address:

Forgot Password ?   ×

Enter your e-mail address below to reset your password.

Email

Cancel   Submit
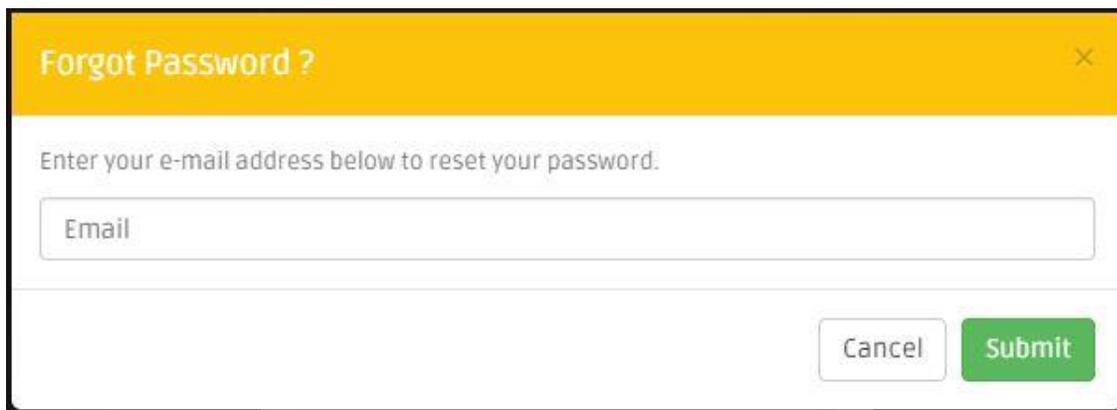
Once you submit your email, we will send you a link to reset your password. Please make sure you provide us with a valid email address. Once you submit your email address, you'll be redirected back to the main log-in page.

Changing a password

To change your password, click on the 'options' tab and the drop-down will give you the *'account settings'* option:
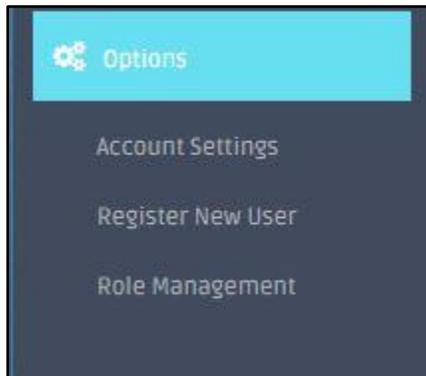
Click on the *'account settings'* tab and the option to change your password pops up:

Click on *'password'*, enter your current password and then your new password. Confirm your new password and submit:

How to log out
On the top right-hand corner of your form is the logout button. Make sure to save your work before you end the session and logout: