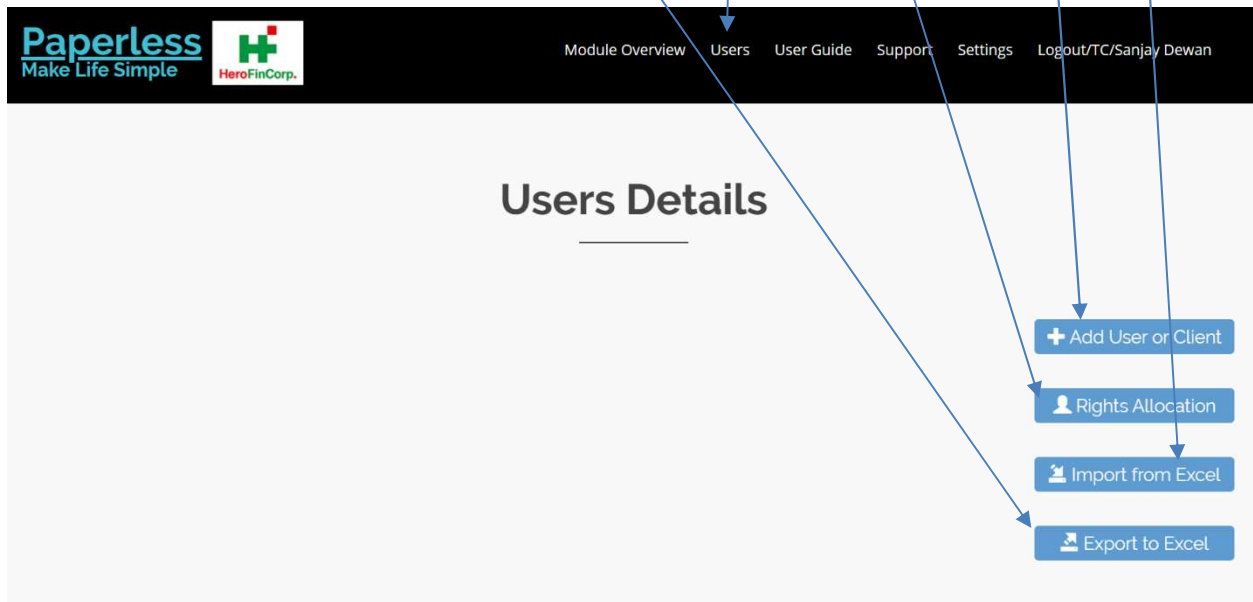


Users Details

1. Click on the “Users” at the navigation bar and following page will open.
2. Click on “Add User or Client” button for creating new user or new client.
3. Click on “Rights Allocation” button for Allocate rights.
4. Click on “Import from Excel” button for Import Excel Data from computer.
5. Click on “Export to Excel” button for Export / Retrieve excel file for all user.



Add Internal User or Client

1. After clicking “Add User or Client” button opening new form “Add internal User or Client”.
2. Now fill up the relevant details in the form for adding new user and new client.
3. For client you will have to enter the company details and address.
4. Then click on “Save” button.

The screenshot shows a web form titled "Add Internal User or Client". The form contains the following fields and controls:

- Name ***: Text input field with placeholder "Enter name here".
- Employee code ***: Text input field with placeholder "ENTER EMPLOYEE CODE HERE".
- Email ID / Username ***: Text input field with placeholder "Enter email id / username here".
- Department ***: Dropdown menu with "Select Department" as the selected option.
- Mobile ***: Text input field with placeholder "Enter mobile number here".
- User type ***: Dropdown menu with "User Type" as the selected option.
- Company name**: Text input field with placeholder "Enter company name here".
- Address**: Text input field with placeholder "Enter address here".



At the top right of the form is a blue button labeled "<< Back". At the bottom left is a blue button labeled "Save".

Four blue arrows point from the numbered list above to the following fields in the form:

- Arrow 1 points to the "Name" field.
- Arrow 2 points to the "Employee code" field.
- Arrow 3 points to the "Company name" field.
- Arrow 4 points to the "Address" field.

Rights Allocation

1. Here you can allocate rights to every user as per your choice
2. In the Rights allocation form you can search new user name or you can scroll down the page the check you create new user or client name.
3. Then you can allocate the all rights which you want to allocate to the new User. For this just click the checkboxes.
4. Rights allocation example: - Add (+), Edit (✎), Publish (▶), View (👁), condemned (🗑).

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[Users](#)
[User Guide](#)
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Rights Allocation

<< Back

Show 10 entries Search: manish

S.No.	User / Client	Send Mail	Management Manual Module	Procedures Manual Module	Attachment Manual	Work Instructions / SOP Manual Module	Forms Manual Module	External Audit Management Module	Audit Management Module	Meetings Management Module	Nonconformity Management	Inspection Reports Module	Feedback & Complaint Management Module	E-Circulars Module	Documents Vault	Archives Module	Save
8	Manish Sharma	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 1 of 1 entries (filtered from 23 total entries) Previous 1 Next

Import from Excel

1. You can import several users in one go by using this function. No need to enter individual user details.
2. After Clicking “Import from Excel” button you see Import from Excel Page.
3. First you Click “Download Template” then you see one excel format file downloaded automatically in your computer.
4. You fill the details in the Excel file the you save it.
5. Click on the “Choose File” and upload the same file.
6. Then Click on Submit button for submit your details

Paperless
Make Life Simple

HeroFinCorp

Module Overview Users User Guide Support Settings Logout/TC/Sanjay Dewan

<< Back

Import from Excel

1. Download Template
2. Choose File
3. Submit

Name	Employee Code	Email Id/Username	User Type	Company Name	Address	Department	Mobile	Status	Edit
------	---------------	-------------------	-----------	--------------	---------	------------	--------	--------	------

User Details Dashboard

- Here you can manage the profile of the user.
- Click on the “Users” at the navigation bar.
- Following page will be open.
- Scroll down till you see the list user’s details dashboard.
- You can Password Reset (🔒), Edit (✎), Account Status – active (🔌) / non-active (🔌), Delete (🗑️) by clicking here.
 - You can reset user’s password by clicking here.
 - You can edit user’s details by clicking here.
 - You can active by clicking here.
 - Non-active users account by clicking here.
 - You can delete users account by clicking here.

Users Details

[+ Add User or Client](#)
[Rights Allocation](#)
[Import from Excel](#)
[Export to Excel](#)

Show entries

Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Act. / Int. Status	Delete
1	Abhishek Kumar	AK123	abhishek.kumar6@herofincorp.com	Internal User			TC - Collections Operations	+91 903 120012	🔒	✎	🔌	🗑️
2	Balaji Thakur	BT123	balaji.thakur@herofincorp.com	Internal User			TC - Collections Operations	+91 9959903650	🔒	✎	🔌	🗑️
3	Bhabani Shankar Sutar	BSS123	bhabani.sutar@herofincorp.com	Internal User			TC - Collections Operations	+91 9902284372	🔒	✎	🔌	🗑️

Users Details


[+ Add User or Client](#)
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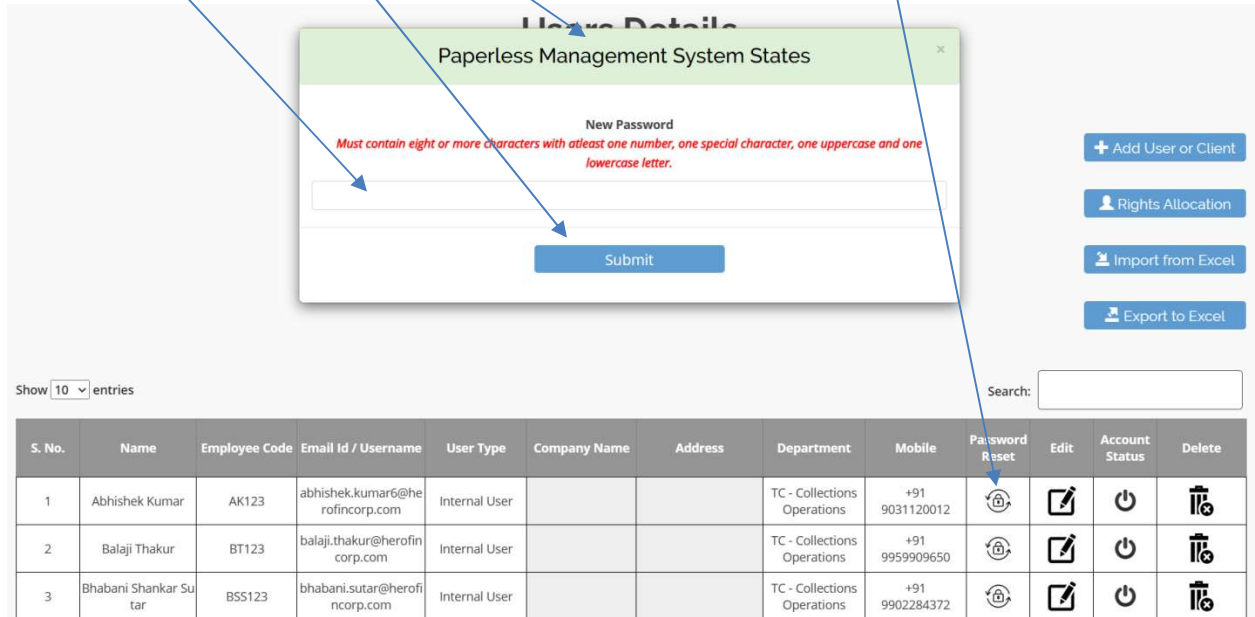
Show entries

Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
9	Mohit Gupta	MG003	qhsecron@gmail.com	Client	Jain Collection Agency	Nagpur, Maharashtra	TC - Management	+91 7898653321	🔒	✎	🔌	🗑️
13	Prabuddh Agrawal	PA001	salesqhserc@gmail.com	Internal User			TC - Human Resources	+91 8976543321	🔒	✎	🔌	🗑️
18	Sanjay Dewan	SD	qhseriskconsultants@gmail.com	Super Admin			TC - Collections Operations	+91 9899111109	🔒	✎		

Resetting the User Password


1. You can reset the password of the user by clicking on 'Password reset'  icon on the user's details dashboard.
2. An alert box will show up.
3. You can enter the new password here, as per password policy.
4. Then click submit button.



The screenshot displays a user management interface. A modal window titled "Paperless Management System States" is open, showing a "New Password" field with a red error message: "Must contain eight or more characters with atleast one number, one special character, one uppercase and one lowercase letter." Below the field is a "Submit" button. To the right of the modal are buttons for "Add User or Client", "Rights Allocation", "Import from Excel", and "Export to Excel". Below the modal, there is a search bar and a table of users. The table has columns for S. No., Name, Employee Code, Email Id / Username, User Type, Company Name, Address, Department, Mobile, Password Reset, Edit, Account Status, and Delete. The "Password Reset" column contains lock icons with a circular arrow, which are highlighted by blue arrows from the instructions.

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
1	Abhishek Kumar	AK123	abhishek.kumar6@herofincorp.com	Internal User			TC - Collections Operations	+91 9031120012				
2	Balaji Thakur	BT123	balaji.thakur@herofincorp.com	Internal User			TC - Collections Operations	+91 9959909650				
3	Bhabani Shankar Sutar	BSS123	bhabani.sutar@herofincorp.com	Internal User			TC - Collections Operations	+91 9902284372				

Editing User Details

1. You can edit the user details by clicking on 'Edit ' icon on the user's details dashboard.
2. A form will open up showing the blank 'Edit User or Client Details' form.
3. Fill up the relevant details.
4. Then Click update users details your details.


Edit User or Client Details

[<< Back](#)

Name *	<input type="text" value="Vineet Agrawal"/>	Employee code *	<input type="text" value="VA003"/>
Email ID / Username *	<input type="text" value="paperlessqhse@gmail.com"/>	Department *	<input type="text" value="TC - Billing"/>
Mobile *	<input type="text" value="5690998764"/>	User type *	<input type="text" value="Internal User"/>

[Update user details](#)

Accounts Status Non-Active

1. You can inactive the user account by clicking on 'Account Status ' icon on the user's details dashboard.
2. An alert box will show up.
3. Click 'OK' to user account non-active.
4. Again fresh a conformation alert box will show up on Click 'OK'.



Users Details

Paperless Management System States

Are you sure you want to make the account non active?

Show entries Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
1	Abhishek Kumar	AK123	abhishek.kumar6@herofincorp.com	Internal User			TC - Collections Operations	+91 9031120012				
2	Balaji Thakur	BT123	balaji.thakur@herofincorp.com	Internal User			TC - Collections Operations	+91 9959909650				
3	Bhabani Shankar Sutar	BSS123	bhabani.sutar@herofincorp.com	Internal User			TC - Collections Operations	+91 9902284372				
4	Gautam Mitra	3774	gautam.mitra@herofincorp.com	Internal User			TC - Training & Quality	+91 9830771625				


Paperless Management System States

User has been made non active successfully.

Show entries Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
1	Abhishek Kumar	AK123	abhishek.kumar6@herofincorp.com	Internal User			TC - Collections Operations	+91 9031120012				

Making the User Account Status Active

1. You can activate the user account by clicking on 'Account Status'  icon on the user's details dashboard.
2. An alert box will show up.
3. Click 'OK' to user account active.
4. Again fresh a conformation alert box will show up on Click 'OK'.

Paperless Management System States

Are you sure you want to make the account active?

OK
Cancel

- [+ Add User or Client](#)
- [Rights Allocation](#)
- [Import from Excel](#)
- [Export to Excel](#)

Show 10 entries Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
9	Mohit Gupta	MG003	qhsecron@gmail.com	Client	Jain Collection Agency	Nagpur, Maharashtra	TC - Management	+91 7898653321				
13	Prabuddh Agrawal	PA001	salesqhserc@gmail.com	Internal User			TC - Human Resources	+91 8976543321				
18	Sanjay Dewan	SD	qhseriskconsultants@gmail.com	Super Admin			TC - Collections Operations	+91 9899111109				
22	Sonu Chaurasia	SC002	eqhse1@gmail.com	Internal User			TC - Audit	+91 9876543212				
26	Vineet Agrawal	VA003	paperlessqhse@gmail.com	Internal User			TC - Billing	+91 5690998764				

Showing 1 to 5 of 5 entries (filtered from 26 total entries) Previous 1 Next

Paperless Management System States

User has been made active successfully.


OK

- [+ Add User or Client](#)
- [Rights Allocation](#)
- [Import from Excel](#)
- [Export to Excel](#)

Show 10 entries Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
1	Abhishek Kumar	AK123	abhishek.kumar6@herofincorp.com	Internal User			TC - Collections Operations	+91 9031120012				

Deleting Users

1. You can delete the user account by clicking on 'Account Status'  icon on the user's details dashboard.
2. An alert box will show up.
3. Click 'OK' to user delete the account.

Users Details
Paperless Management System States

Are you sure you want to delete the account?

Show entries Search:

S. No.	Name	Employee Code	Email Id / Username	User Type	Company Name	Address	Department	Mobile	Password Reset	Edit	Account Status	Delete
1	Abhishek Kumar	AK123	abhishek.kumar6@herofincorp.com	Internal User			TC - Collections Operations	+91 9031120012				
2	Balaji Thakur	BT123	balaji.thakur@herofincorp.com	Internal User			TC - Collections Operations	+91 9959909650				
3	Bhabani Shankar Sutar	BSS123	bhabani.sutar@herofincorp.com	Internal User			TC - Collections Operations	+91 9902284372				
4	Gautam Mitra	3774	gautam.mitra@herofincorp.com	Internal User			TC - Training & Quality	+91 9830771625				