



# User Manual

GreenForm

## Table of contents

### Getting started

- GreenForm overview
- What are forms and what are they used for?
- How do I obtain a user login/ access to forms in my company?
- What do I need to access GreenForm?

### Logging on

- Landing page

### Selecting a form to start a transaction

- The list of forms
- What happens if I can't find my form?

### Completing a form

- Mandatory fields
- Field masks (phone numbers, etc.)
- Date picker fields
- Capturing RSA Identity numbers (look-up and auto-population)
  - What to do if information doesn't automatically populate
- Signing a document
  - How to sign
  - What happens if I 'clear signature'?
- Taking photos
- Uploading documents
  - What documents can I attach?
  - How do I upload?
  - What happens if I struggle to upload?
- Fingerprint enrolment
- Notifications panel
  - Notifications
  - Messaging
- Forgot your password
  - How to reset password
  - Process of getting new password
- How to log out

## **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

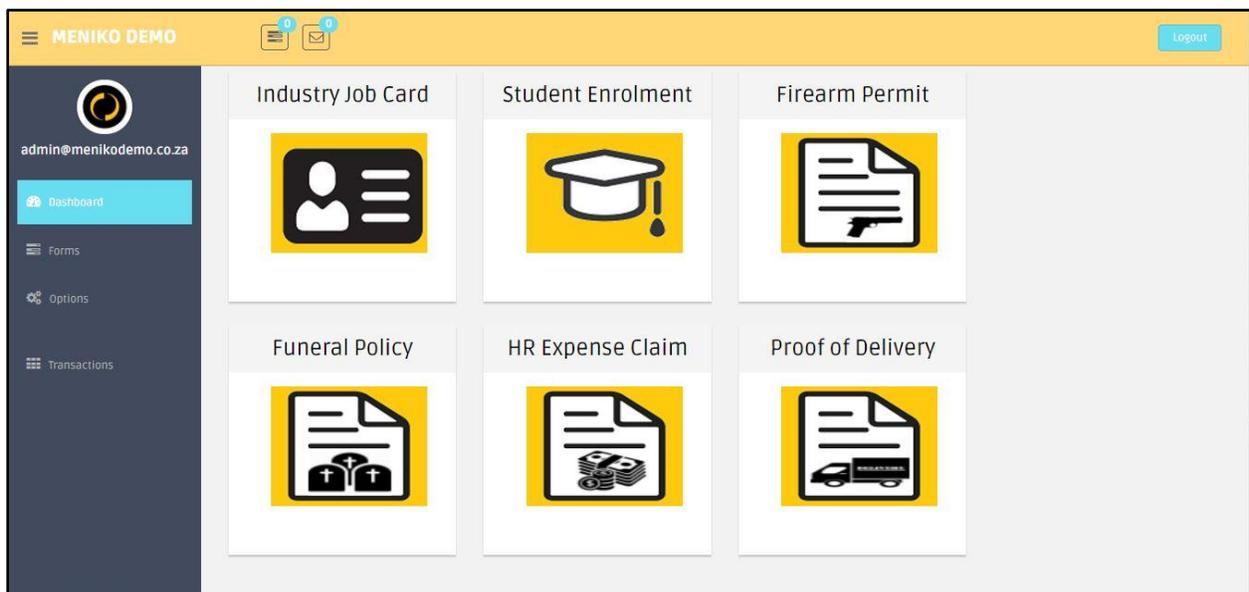
Log onto [www.greenform.co.za](http://www.greenform.co.za). It will take you to the sign-in page where you enter your log-in details:



The image shows a sign-in page with a yellow header containing the text "SIGN IN NOW". Below the header are two input fields: "User Name" and "Password". Under the "Password" field, there is a "Remember me" checkbox and a "Forgot Password?" link. At the bottom of the form is a green button with a lock icon and the text "SIGN IN".

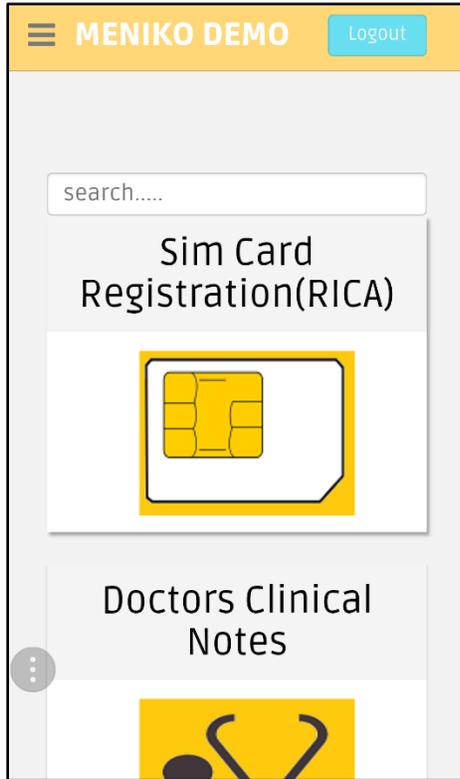
## Logging in

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

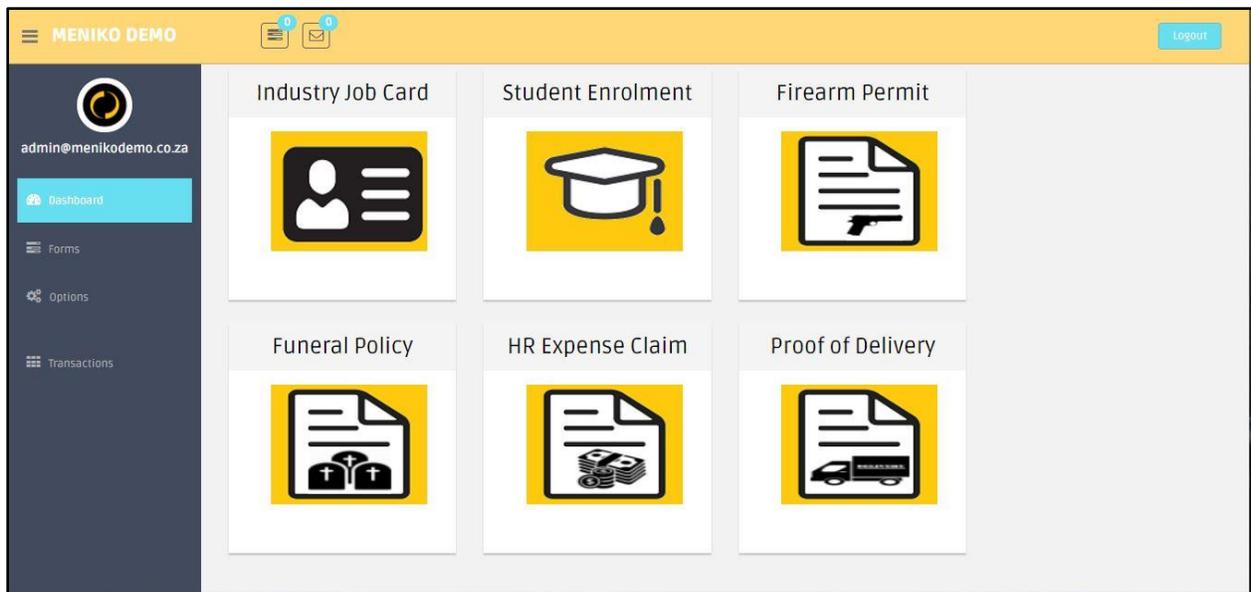


The image shows a dashboard interface for "MENIKO DEMO". The top navigation bar is yellow and contains a menu icon, the text "MENIKO DEMO", notification icons, and a "Logout" button. The left sidebar is dark blue and contains the user profile "admin@menikodemo.co.za" and a menu with items: "Dashboard", "Forms", "Options", and "Transactions". The main content area is light gray and displays a grid of six transaction cards, each with an icon and a title: "Industry Job Card" (person icon), "Student Enrolment" (graduation cap icon), "Firearm Permit" (document with gun icon), "Funeral Policy" (document with crosses icon), "HR Expense Claim" (document with money icon), and "Proof of Delivery" (document with truck icon).

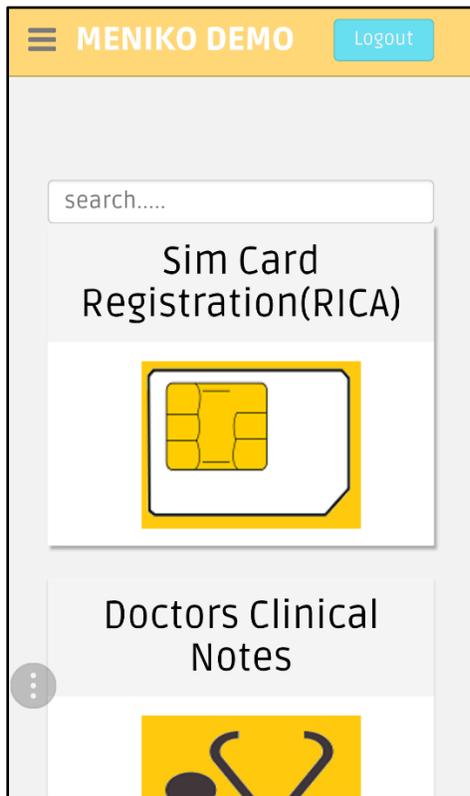
On mobile, your landing page will appear this way:



The main page has a list of forms with their logos. Click on the form that applies to you:



On mobile:

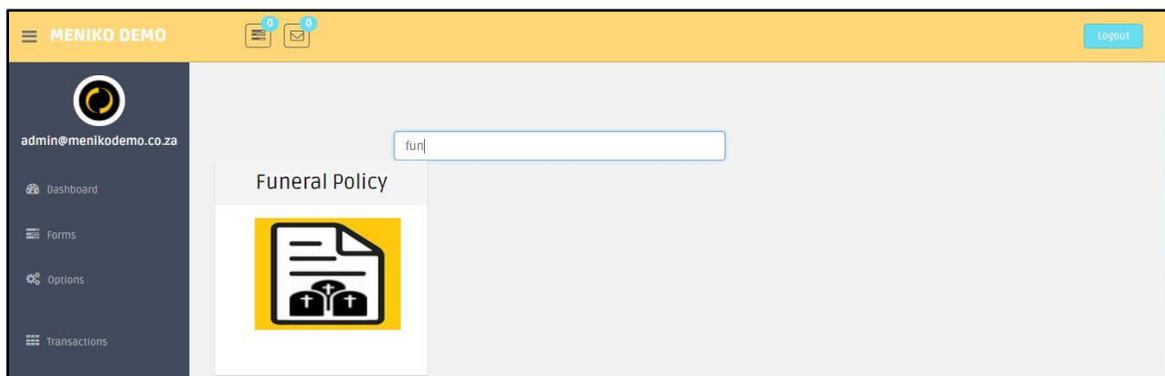


### What happens if I can't find my form?

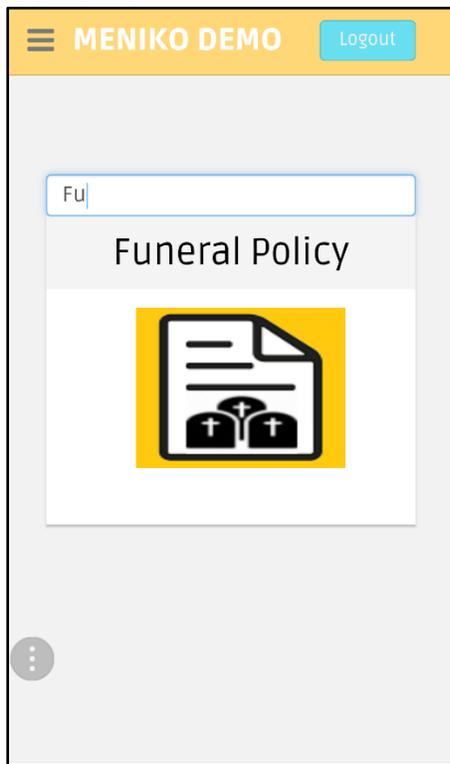
If you can't immediately find your form, there's now a search option button to look for your form:



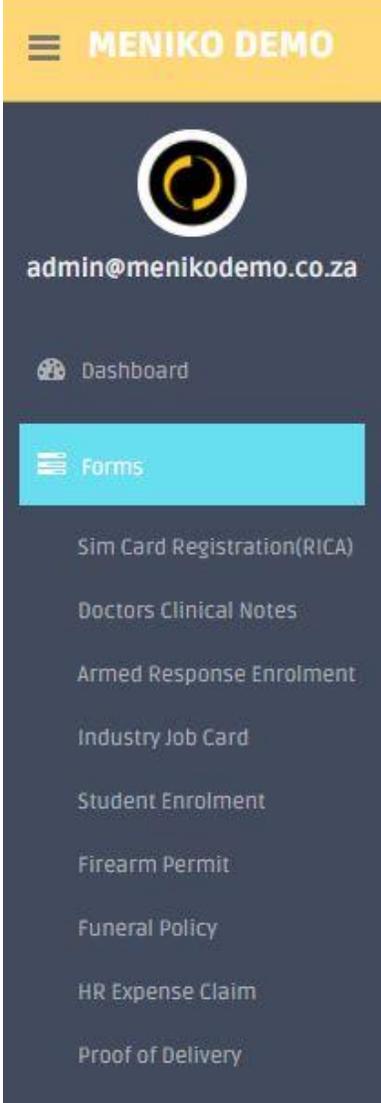
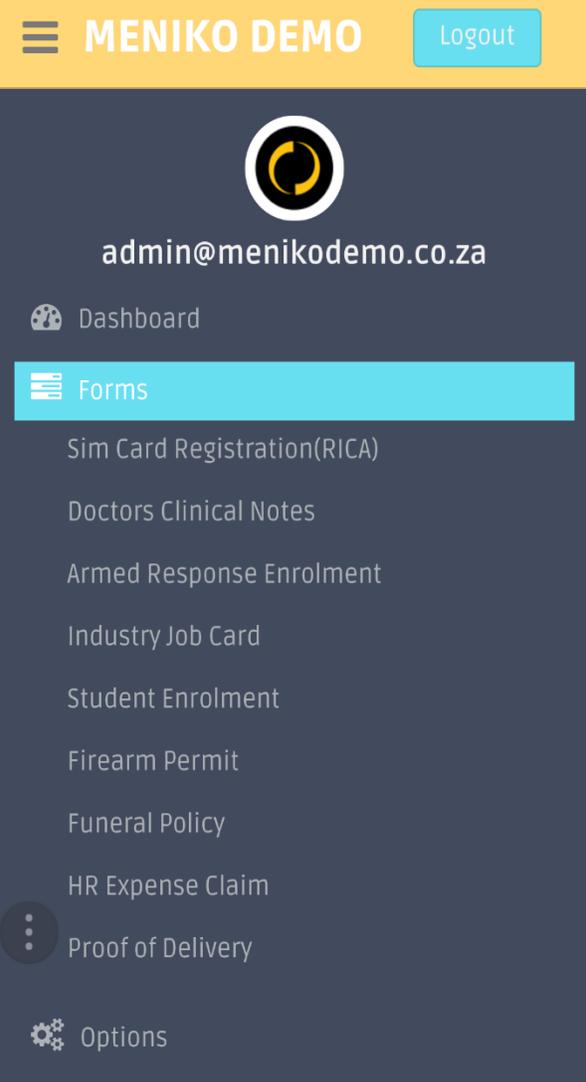
As you type in the name of your form, name suggestions pop up to help you find it easier. Locate your form, click on it and start transaction:



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
	

## Completing a form

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

☰ MENIKO DEMO
📧 2
📧 2
Logout

admin@menikodemo.co.za

- Dashboard
- Forms
- Options
- Transactions

## FIREARM PERMIT

Permit Number 9057

AUTHORISED TO BE IN POSSESSION OF COMPANY FIREARM  
MAGTIGNING OM IN THE BESIT TE WEES VAN MAATSKAPPY VUURWAPEN

ID No.*	<input type="text" value="Identity Number"/>	Full Name	<input type="text" value="Full Name"/>
Company Number	<input type="text" value="Company Number"/>	Email	<input type="text" value="Email"/>
Co./ Mpy.	<input type="text" value="---Select---"/>	Posted/Gepos	<input type="text" value="---Select---"/>

is hereby authorised to be in possession of the undermentioned fire-arm for the period mentioned hereunder. is hierby gemagtig om in besit te wees van ondergenoemde vuurwapen vir die periode hieronder aangedeul.

Firearm No./ Vuurwapen Nr.	<input type="text"/>	Make/ Febrikaat	<input type="text"/>
Calibre/ Kaliber	<input type="text"/>	Rounds Ammunition/ Rondtes Ammunisie	<input type="text" value="Rounds Ammunition"/>

This is how your form will look on mobile:

☰ MENIKO DEMO
Logout

## FIREARM PERMIT

Permit Number 32219

AUTHORISED TO BE IN POSSESSION OF COMPANY FIREARM  
MAGTIGNING OM IN THE BESIT TE WEES VAN MAATSKAPPY VUURWAPEN

ID No.\*

Full Name

Company Number

Email

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.**

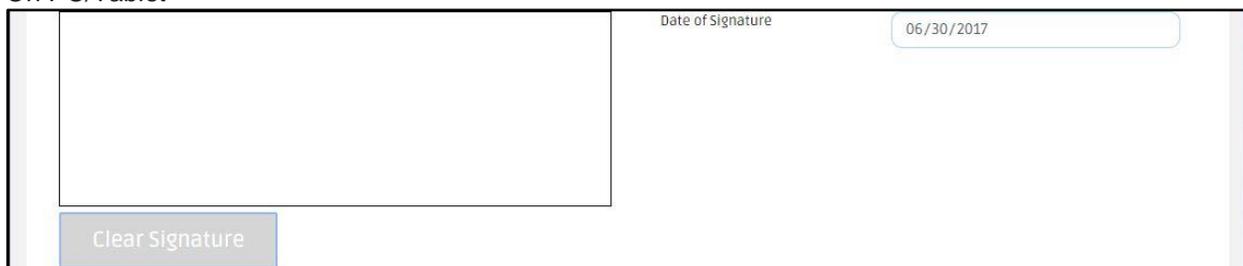
If your information doesn't automatically load, refresh the page and try again. You can also just fill in the information manually.

## SIGNATURE

### How to sign

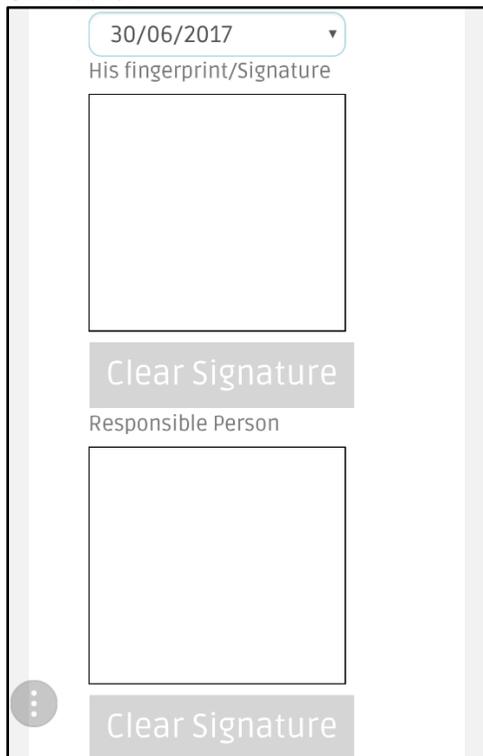
Like you would on a hard copy, once you're done filling in the form, you'll need to sign to validate the form:

On PC/Tablet



The screenshot shows a digital signature interface on a PC or tablet. It features a large, empty rectangular box for the signature. To the right of this box is a 'Date of Signature' field containing the date '06/30/2017'. Below the signature box is a button labeled 'Clear Signature'.

On mobile:



The screenshot shows the signature interface on a mobile device. At the top, there is a date dropdown menu set to '30/06/2017'. Below it is the label 'His fingerprint/Signature' and a large empty box for the signature. Underneath the signature box is a 'Clear Signature' button. Below that is the label 'Responsible Person' and another large empty box for the signature. At the bottom of the form is another 'Clear Signature' button. A menu icon (three dots) is visible in the bottom left corner.

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.

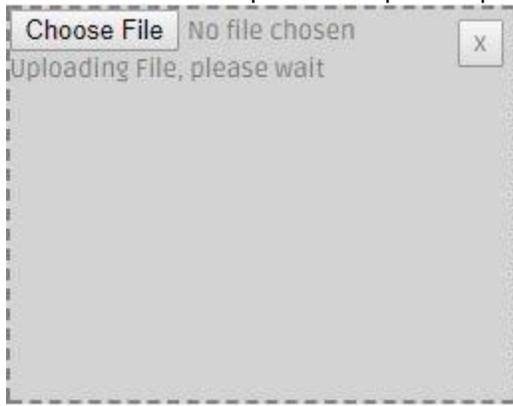
### What happens if I 'clear signature'?

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.

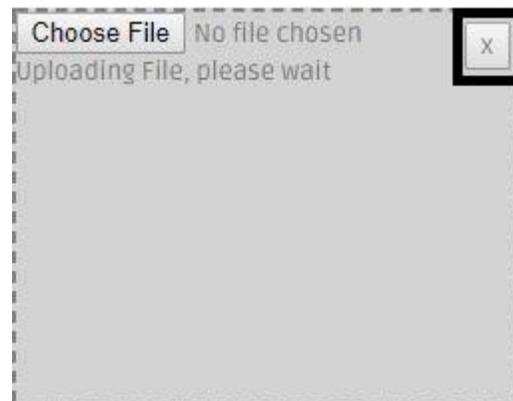
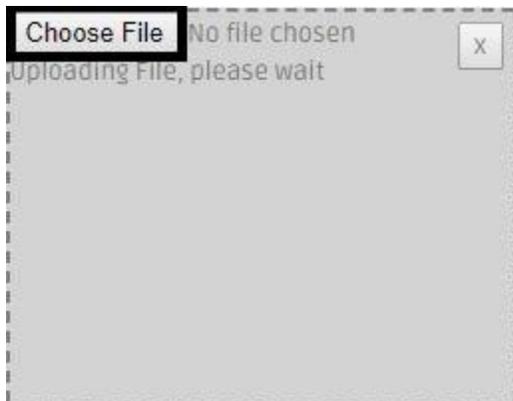


### TAKING PHOTOS

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



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:



### 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



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

#### Student Fingerprint



## 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:



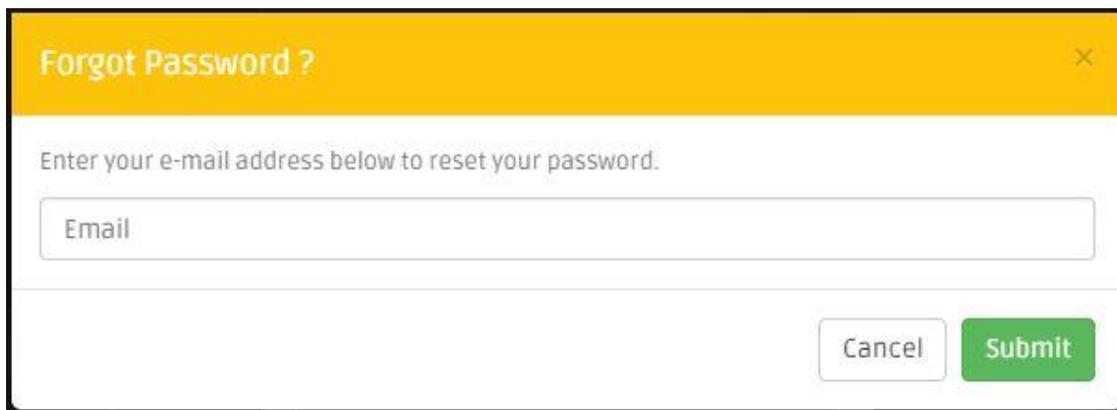
### Messaging

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



### 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:



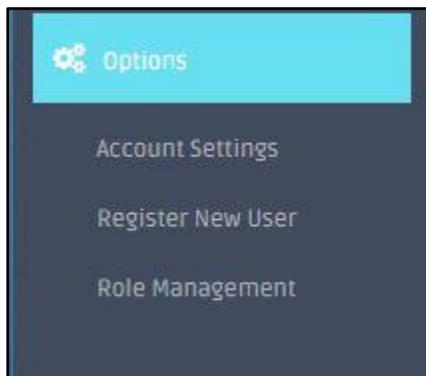
Forgot Password ?

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

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:

A screenshot of a form titled "Change Password Form". At the top is a header "Password details" with a light gray background. Below this are three input fields: "Current Password", "New Password", and "Confirm Password". Each field has a light blue border and a light blue shadow. At the bottom right of the form is a blue button with rounded ends labeled "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:

