

SignChronix

Digital Signature Certificate Management System

User Manual

Version 1.0

1. Getting Started

1.1 What is SignChronix

SignChronix helps your firm manage Digital Signature Certificates (DSCs). With SignChronix, you can:

- Track tokens and DSC records
- Store PAN and Aadhaar documents
- Log token movements (inward and outward)
- Send receipts and renewal emails
- Export reports in Excel or PDF format

1.2 Login

1. Open the SignChronix login page. (<https://signchronix.mobs.co.in/>)
2. Enter your Email Address and Password.
3. Click Sign in to Portal.
4. If you forget your password, click Forgot password? and follow the reset email.

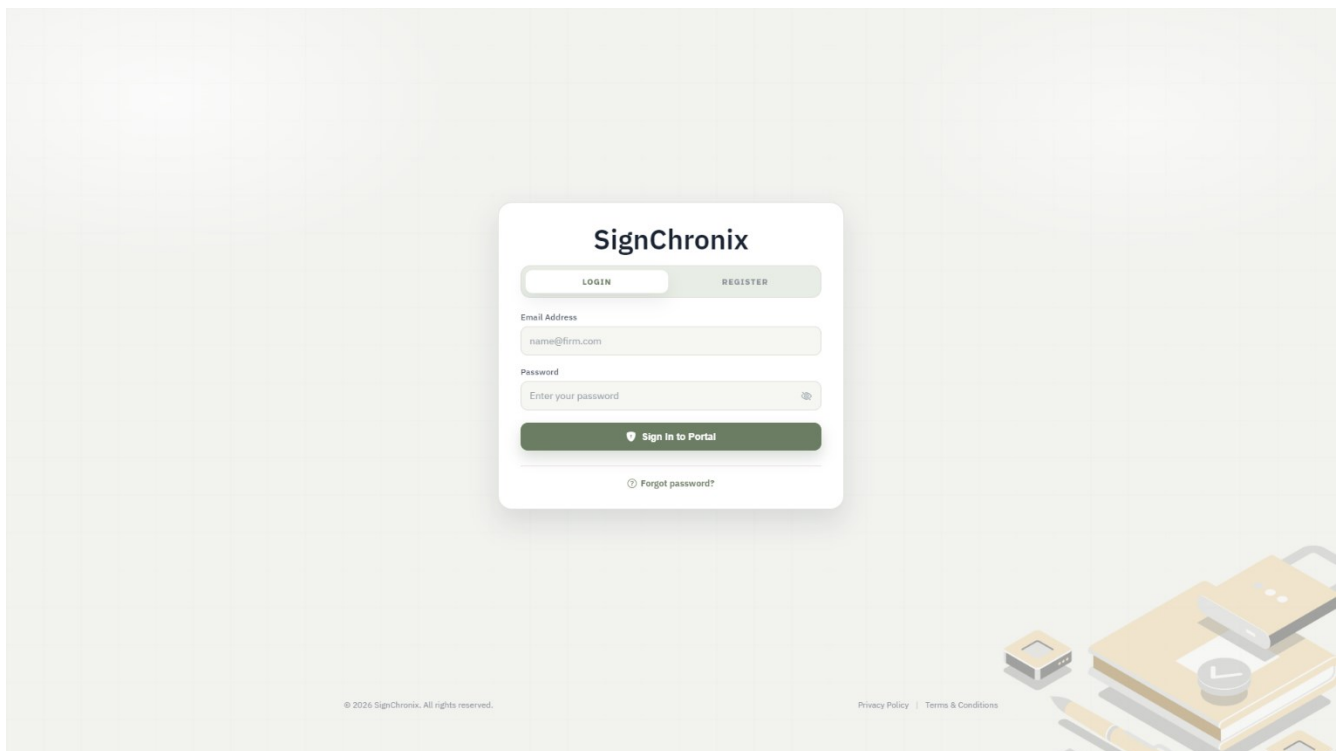


Figure 1 Firm Login

1.3 Register a New Firm

Only required for new firms setting up SignChronix for the first time.

1. Click the Register tab.
2. Fill in firm details (Firm Name, Email, Phone, etc.).
3. Submit the form to start the free trial.

Figure 2 Register Firm Form

1.4 User Roles

Access within SignChronix depends on your assigned role:

Role	Permissions
Admin	Full access to settings, backups, staff users, and Google connection.
Staff	Can add DSCs, record movements, and view records. Cannot change firm settings.

2. Understanding the Dashboard

The dashboard is your control center. It provides an at-a-glance overview of your firm's DSC activity:

- Total DSCs registered in your firm
- DSCs currently in the office vs. with clients
- Expired and expiring-soon records
- Recent movement activity

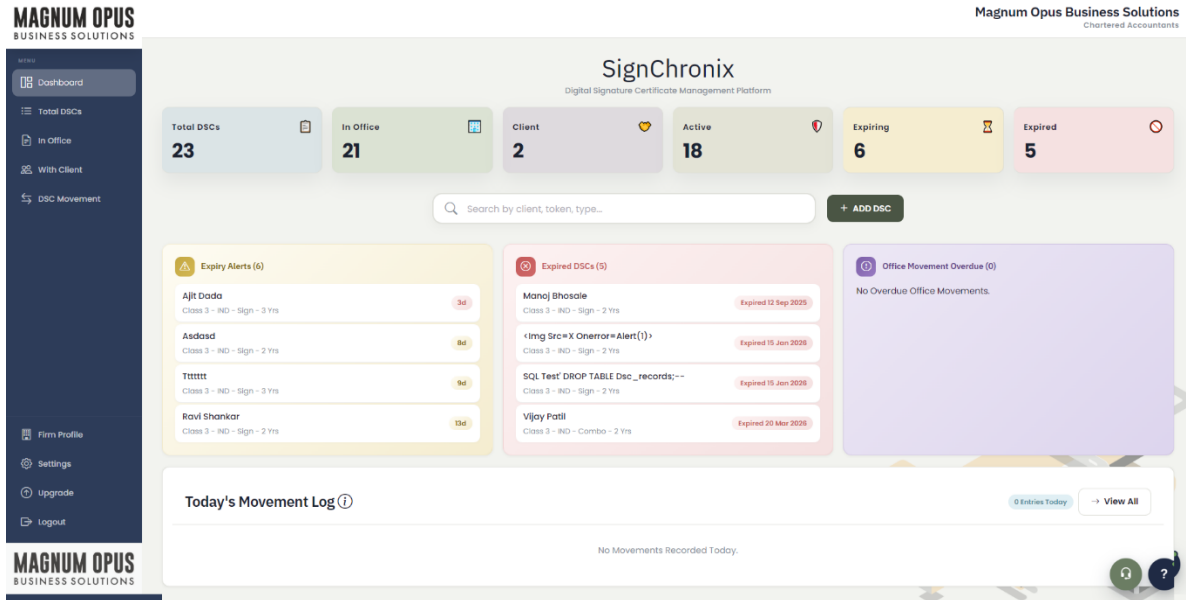


Figure 3 Dashboard

Tip: Click any record on the dashboard to open its full details quickly.

3. Add and Manage DSC Records

3.1 Add a New DSC

1. Go to Total DSCs from the sidebar.
2. Click Add DSC.
3. Fill all required fields (Client Name, PAN, Aadhaar, Token No, Dates).
4. Click Save.

3.2 Edit a DSC

1. Open the DSC record.
2. Click Edit.

3. Update the relevant fields and save.

3.3 Delete a DSC

1. Open the DSC record.
2. Click Delete and confirm the action.

3.4 Important Data Tips

- **Valid From:** Must be set before the Expiry Date.
- **PAN & Aadhaar:** Use correct formats to avoid validation errors.
- **Contact Details:** Keep client contact information up to date.

Figure 4 - Add DSC

Client	PAN	Aadhaar	Expiry Date
Manoj Bhosale	INMB022Y	03245678901	11 Sep 2025

Figure 5 - DSC Details

4. Token Movement

4.1 Log a Movement

1. Go to DSC Movement.
2. Choose the DSC record.
3. Select the movement type: Inward, Outward, Office In, or Office Out.
4. Fill in custody details and any notes.
5. Save to generate a movement receipt.

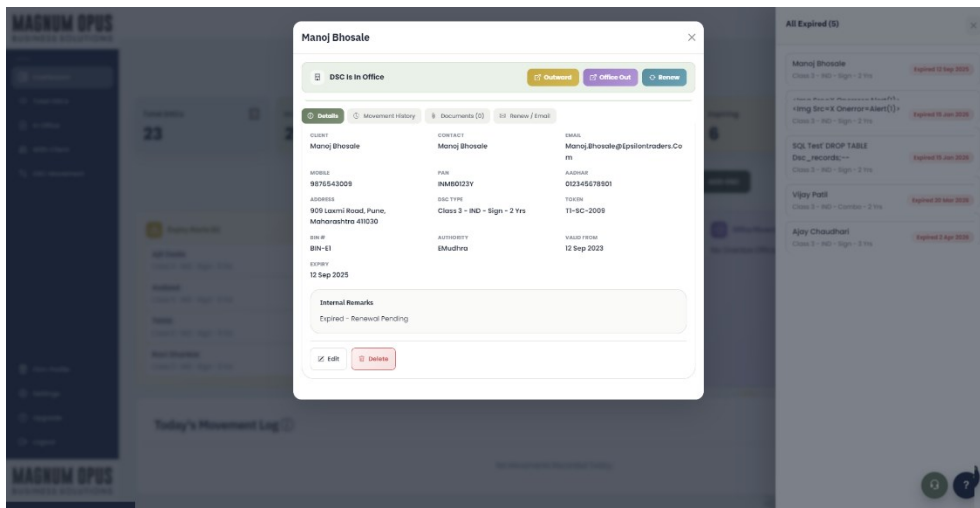


Figure 6 – Movements type – Inward, Outward, Office in, Office out

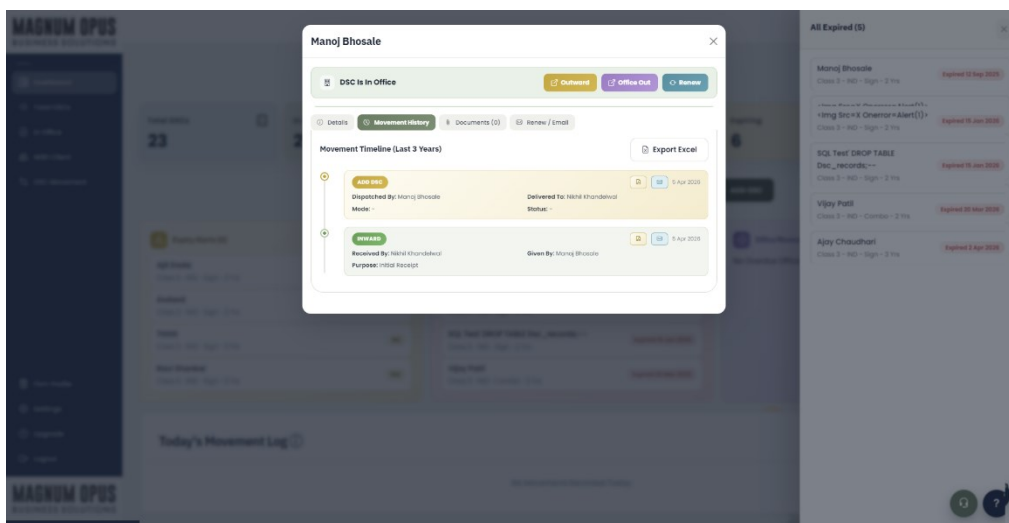


Figure 7 – Movement History

4.2 Receipt and Email

1. Open a movement record.
 2. Generate the receipt PDF.
 3. Email it to the client if a Google account is connected.
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5. Documents

5.1 Upload PAN / Aadhaar

1. Open a DSC record.
2. Go to the Documents tab.
3. Upload PAN and Aadhaar files.

Important: Documents are stored in your connected Google Drive, not on SignChronix servers.

5.2 Google Account Connection

A Google account connection is required to use the Documents and Renewal Email features.

1. Go to Settings.
 2. Click Connect Google Account.
 3. Approve the requested permissions.
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6. Renewal and Email

You can send renewal reminders or general emails directly from a DSC record.

- Open a DSC record.
- Go to the Renew / Email tab.
- Select data and attachments.
- Send the email.

Note: A connected Google account is required before sending renewal emails.

7. Reports and Export

7.1 Export to Excel or PDF

- Open Total DSCs or Movement from the sidebar.
- Apply filters (date, status, location) as needed.
- Click Export and choose your preferred format.

7.2 Bulk Import

Admins can import many DSC records at once using an Excel template.

- Go to Import.
- Upload the template file.
- Check the data preview and confirm.

Note: Bulk Import is only available if enabled for your role.

8. Firm Settings (Admin Only)

8.1 Firm Profile

- Update firm name, address, and phone number.
- Upload your firm logo (it appears on printed receipts).

8.2 Email Settings

- Professional email (SMTP) is used for upgrade and support emails.
- Google account is used for documents and renewal emails.

8.3 Backup and Restore

- Go to Settings.
- Click Download to save a backup file.
- Use Restore only when needed to recover data.

9. Upgrade Plan and Payment

- Go to Upgrade.
- Select a plan.
- Scan the QR code and complete the payment.
- Enter the payment reference ID in the form.

- Administrator approval activates the plan.

Note: Your plan will not activate automatically. Administrator must approve the payment request.

10. Customer Care Support

If you encounter any issues:

- Open the Support form.
- Choose the issue type and write your message.
- Upload a screenshot if helpful.
- Submit the form.

Your request is sent to Administrator, and a copy is emailed to your firm's registered email address.

11. Best Practices

- 1 Log inward and outward movements on the same day.
- 2 Keep PAN and Aadhaar uploaded for every DSC record.
- 3 Review expiring-soon alerts every week.
- 4 Run exports monthly for audit purposes.
- 5 Keep your Google account connection active for documents and renewal emails.

12. Troubleshooting

Problem	Fix
Email not sending	Check Google connection or SMTP credentials in Settings.
Cannot upload documents	Connect Google Drive in Settings.
Upgrade not active after payment	Administrator must approve the payment request.

End of Manual • SignChronix DSCMS