

# SECURE RECORDS SOLUTIONS

---

INSTRUCTIONS FOR MANAGING  
AUTHORIZED USERS

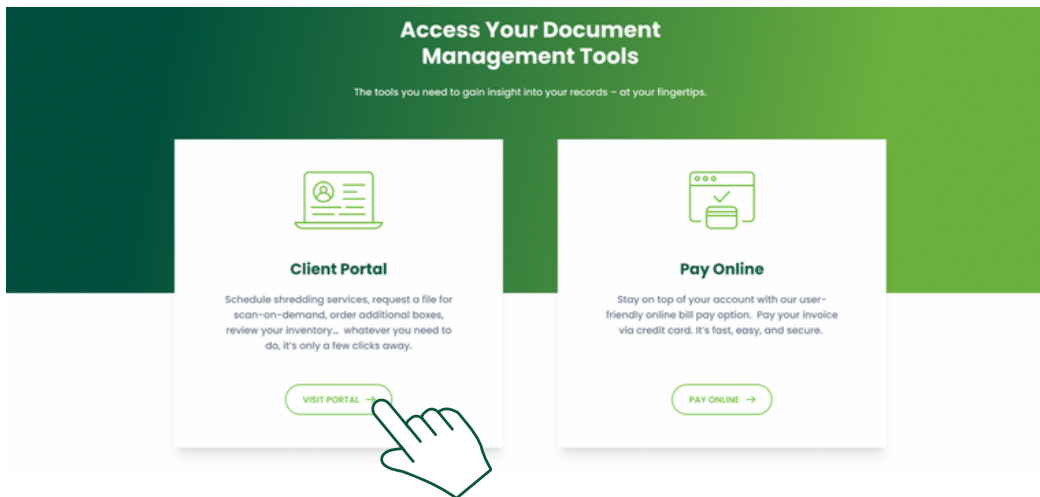


# STEPS TO MANAGE AUTHORIZED USERS

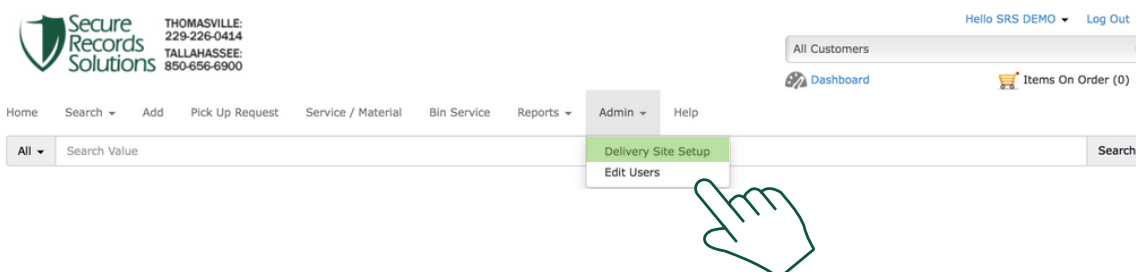
1. Visit [www.securerecordssolutions.com](http://www.securerecordssolutions.com) and click on "CLIENTS" in top menu or visit [www.securerecordssolutions.com/clients](http://www.securerecordssolutions.com/clients) to access the clients page directly.



2. From the Client Page ([www.securerecordssolutions.com/clients](http://www.securerecordssolutions.com/clients)), click on the "VISIT PORTAL" button on the lefthand side of the page. Login using your username and password. If you need password assistance, email [clientcare@securerecordssolutions.com](mailto:clientcare@securerecordssolutions.com).



3. Go to "Admin", then "Edit Users".



# STEPS TO MANAGE AUTHORIZED USERS

4. You will then see your list of authorized users. Should you wish to edit a users profile, click their name, then click “Edit” on the right.

Home Search ▾ Add Pick Up Request Service / Material Bin Service Reports ▾ Admin ▾ Help

Home / Admin / Edit Users

### Edit Users

First Name	Last Name	Web User
DEMO	Standard	DEMO
SRS	DEMO	SRSDEMO

General user settings

Print Add Edit Remove

First Name: SRS Last Name: DEMO Master Customer: Client Name

Web ID: SRSDEMO Password:

PO1: Client Name Remove Customer

5. Once you have selected edit, you will be able to update the individual's name, email, and access level.

### General user settings

Print Save Cancel

First Name: DEMO Last Name: Standard Master Customer: Client Name

Web ID: DEMO Password:

PO1: Client Name

Pin: Phone:

Email: tyler@securerecordssolutions.com Authorized Contact Group: ADMIN WEB USER

Yes, should receive receipt report.

Yes. Has access to all departments.  
 Yes. Access to items without department.

Default Department: None [Select](#)

Department Name
<input checked="" type="checkbox"/> MASCO PC01234
<input type="checkbox"/> ACCOUNTING
<input type="checkbox"/> DEMO HOME OFFICE
<input type="checkbox"/> HR
<input type="checkbox"/> Medical Records
<input type="checkbox"/> OPERATIONS

# STEPS TO MANAGE AUTHORIZED USERS

---

6. Once you have selected edit, you will be able to update the individual's name, email, and access level.

7. When you are finished, click "Save". Please note that only SRS can view and change passwords.



8. To add a new user, simply click "Add" in the right corner and fill out the profile. To remove a user simply click "Remove".

General user settings Print Add Edit Remove

---

First Name	Last Name	Master Customer
<input type="text" value="DEMO"/>	<input type="text" value="Standard"/>	<input type="text" value="Client Name"/>
Web ID	Password	
<input type="text" value="DEMO"/>	<input type="text"/>	
<a href="#">PO1: Client Name</a>		<a href="#">Remove Customer</a>

If you need further assistance, feel free to contact our team.

Phone: (229) 226 - 0414  
Phone: (850) 656 - 6900