



USER MANUAL

Frontend - User Account Management

Objective: This document is a step-by-step guide on how to login into the portal, create and edit users, and manage users across your organization.

Intended Users: NSE Members

Document Owner: NSE

Note: This publication is a corporate document prepared as part of the NSE transformation program.



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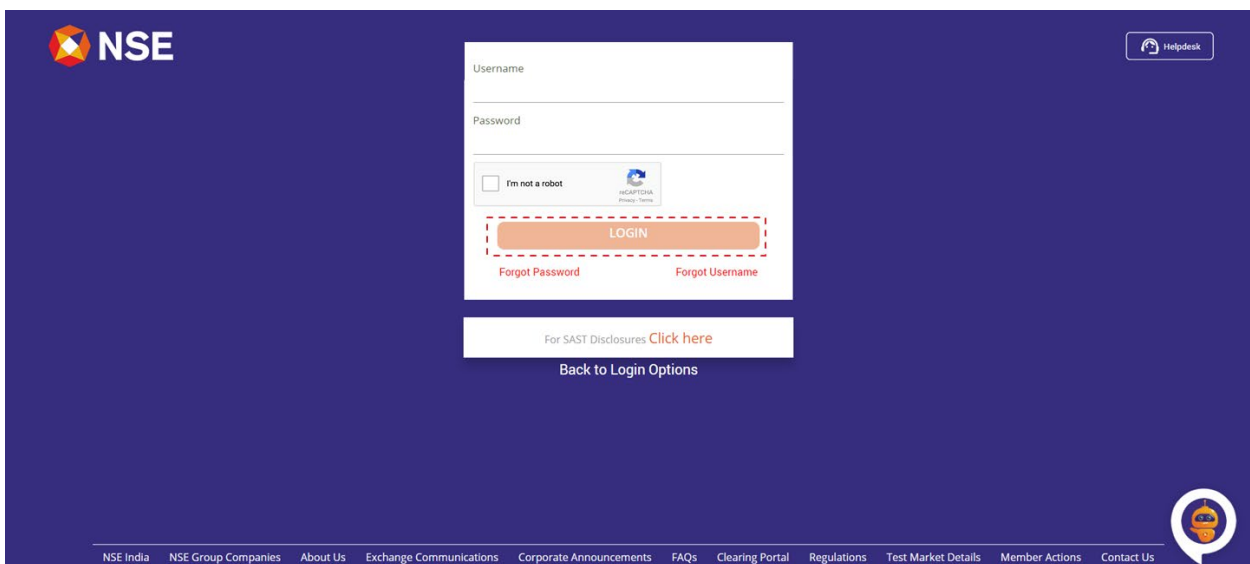
1 Login to the portal

Access NSE Digital Portal (<https://digitalexchange.nseindia.com/nse-frontend-navigation/#/auth>)

1.1 Exchange Portal Login Page

On the login page, enter your username and password, authenticate using reCAPTCHA and click 'Login'.

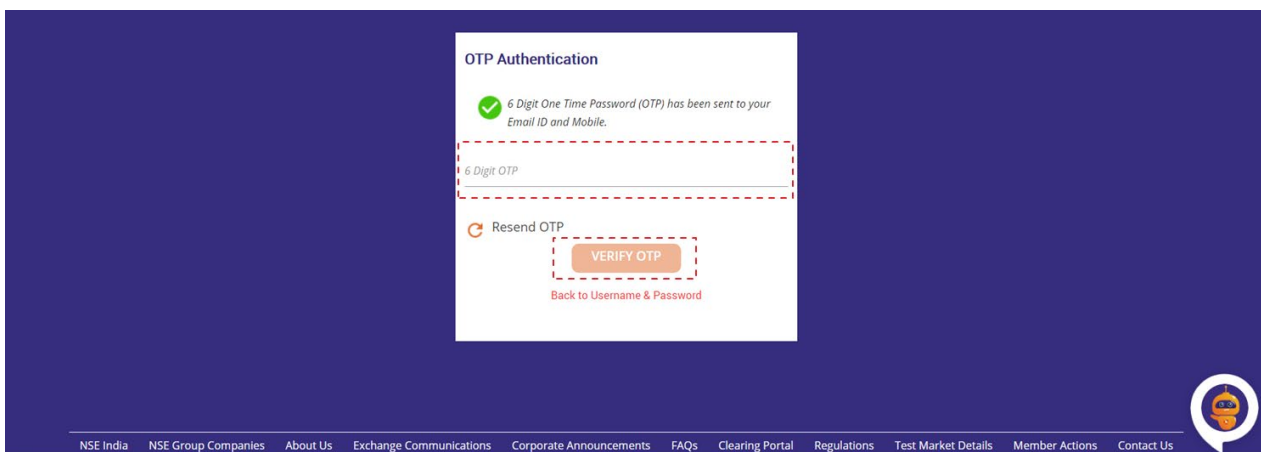
You can also use the Forgot Password/Username facility if required.



The screenshot shows the NSE Digital Portal login page. It features the NSE logo in the top left corner. The main login form includes fields for Username and Password, a reCAPTCHA verification step with the text 'I'm not a robot', and a prominent orange 'LOGIN' button. Below the login button are links for 'Forgot Password' and 'Forgot Username'. At the bottom of the form, there is a link for 'SAST Disclosures' and a 'Back to Login Options' button. A 'Helpdesk' icon is located in the top right corner. The footer contains a navigation menu with links: NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, FAQs, Clearing Portal, Regulations, Test Market Details, Member Actions, and Contact Us. A chatbot icon is visible in the bottom right corner.

1.2 OTP verification

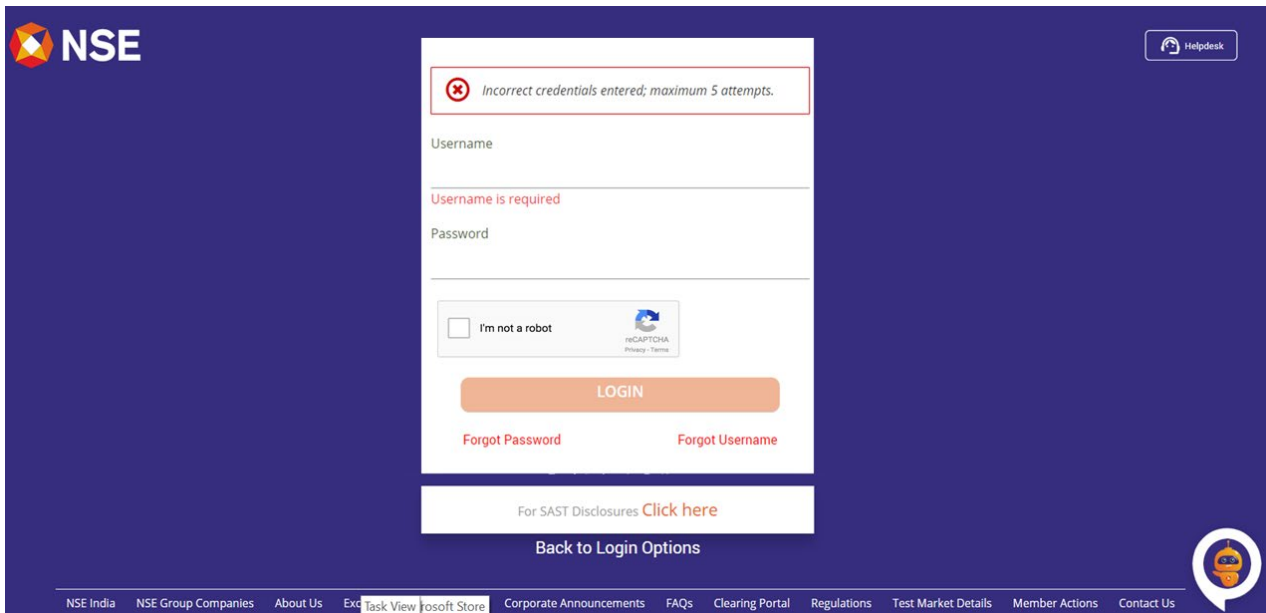
If the login details are correct, you will be redirected to the OTP authentication page. Enter the OTP received on your email address/mobile number and click 'Verify OTP'.



The screenshot shows the NSE OTP Authentication page. It features a green checkmark icon and the text '6 Digit One Time Password (OTP) has been sent to your Email ID and Mobile.' Below this is a text input field labeled '6 Digit OTP'. There is a 'Resend OTP' button with a circular arrow icon. A prominent orange 'VERIFY OTP' button is located below the input field. At the bottom of the form, there is a link for 'Back to Username & Password'. The footer contains the same navigation menu as the login page: NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, FAQs, Clearing Portal, Regulations, Test Market Details, Member Actions, and Contact Us. A chatbot icon is visible in the bottom right corner.

1.3 Incorrect Password

If you have entered the incorrect password, system will show an error message on top. Retype the username and password, authenticate using reCAPTCHA, before clicking on 'Login'

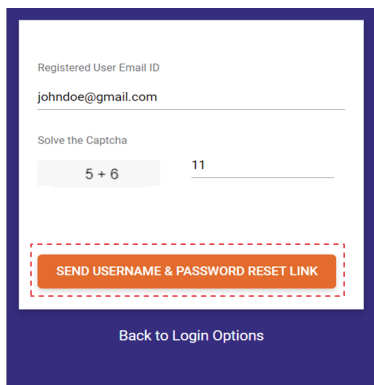


Note:

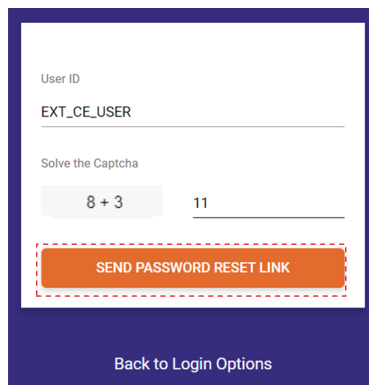
Maximum of 5 attempts are allowed before the username is blocked.

1.4 Forgot username/password

Click 'Forgot Username' or 'Forgot Password' on the Exchange login screen or 'Change/Reset Password' on login screen in case you have forgotten your username/ password.

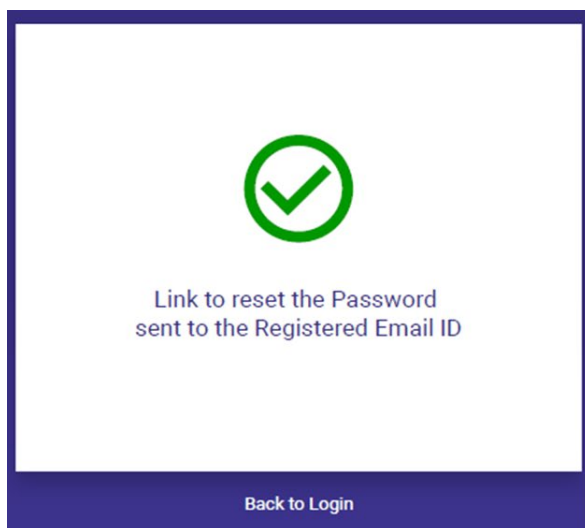


Forgot Username - Enter email ID and captcha. Click Send button.

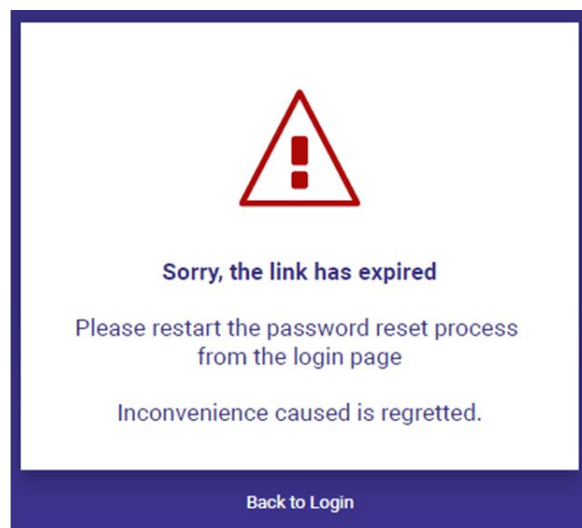


Forgot Password - Enter user ID and captcha. Click Send button.

If email ID or user ID is correct (depending on username/password reset), system will send a reset link to registered email ID. Navigate to your mailbox and action the email.



Reset link sent to registered email ID



In case you try to action the reset link after xx hours, system will display that link as expired. You need to restart the reset process from login page.

On clicking the reset link in the received email, you will be redirected to the 'Reset password' page. Enter the new password and confirm again. Click 'Reset Password'. System will show pop-up confirming password has been reset.



Reset Password

User ID
CLRMEM1

New Password
●●●●●●●●●●

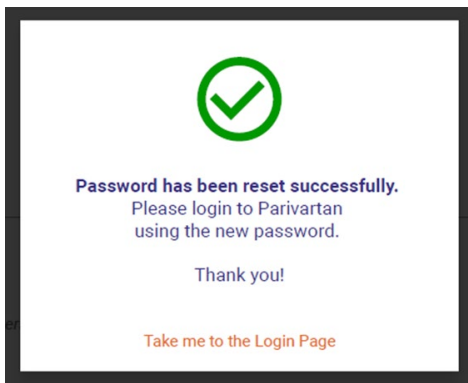
Confirm Password
●●●●●●●●●●

Guidelines for Password
1. Password should be between 12-15 characters
2. Password can contain the below characters

Lowercase: a-z
Uppercase: A-Z
Numeric Character: 0-9
Non-alphanumeric Special characters: @ # \$ % * & /

RESET PASSWORD

Note:
Ensure you follow the password setting guidelines.

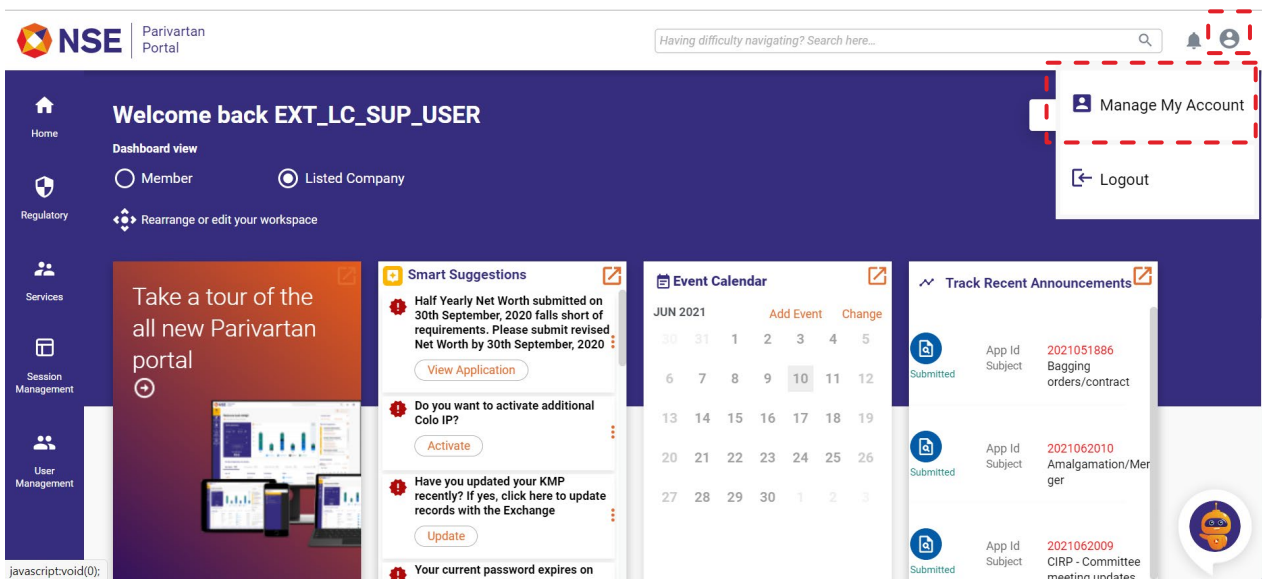
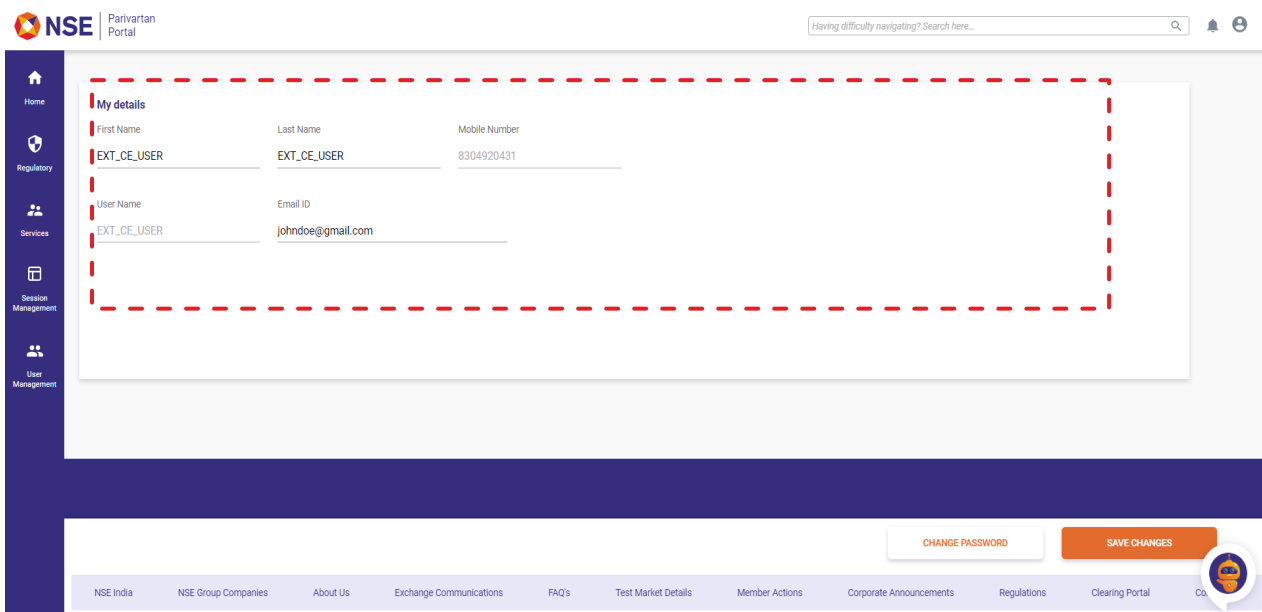


Password reset successfully

2 Manage your account

2.1 Edit Account details

To edit your details, click the face icon on top right. Then click 'Manage account'. Update name, mobile number or email address. Click 'Save changes'.

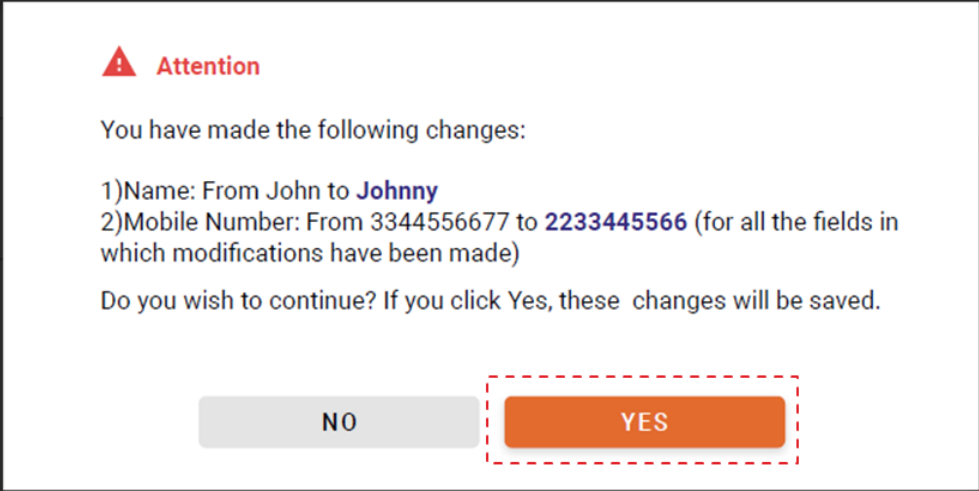
If data entered in any field is invalid, system will show a error message below the field. Else, system will display a pop-up enlisting changes made and asking for confirmation. Click 'Yes' if everything has been captured correctly.

Mobile Number

+91 ▼ 8967346523

✖ Mobile Number is not valid

Data entered in any field is
invalid



A confirmation dialog box with a white background and a dark grey border. At the top left is a red triangle icon with an exclamation mark, followed by the word "Attention" in red. Below this, the text "You have made the following changes:" is displayed. A list of changes follows: "1)Name: From John to **Johnny**" and "2)Mobile Number: From 3344556677 to **2233445566** (for all the fields in which modifications have been made)". Below the list, the text "Do you wish to continue? If you click Yes, these changes will be saved." is shown. At the bottom, there are two buttons: a grey "NO" button and an orange "YES" button. The "YES" button is highlighted with a red dashed border.

Confirmation screen and list of changes

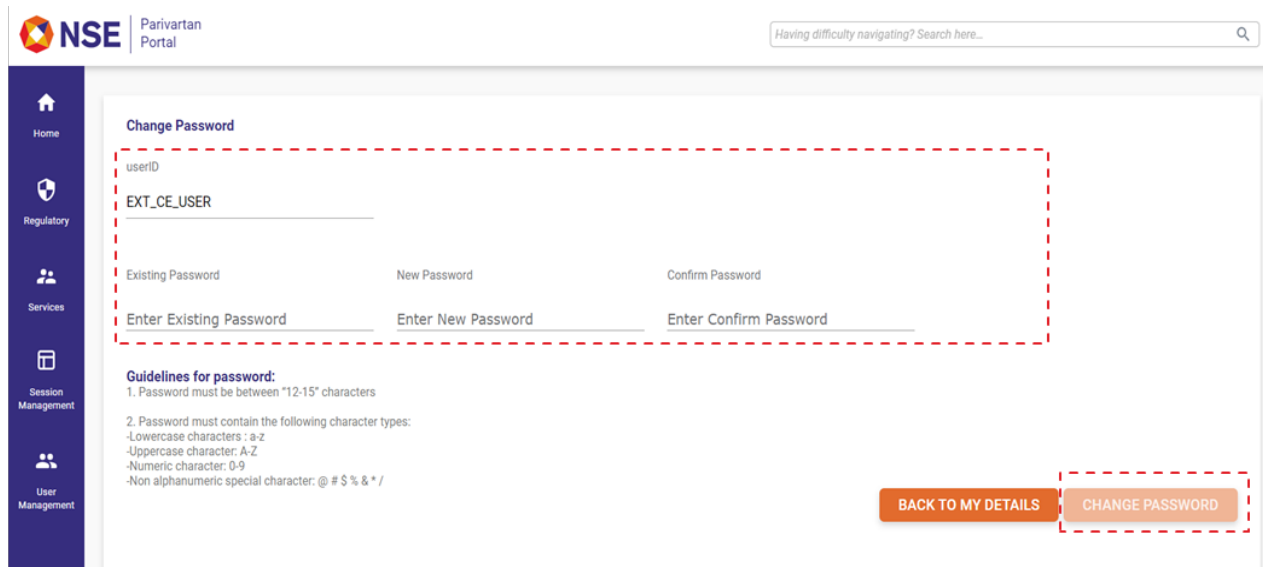
2.2 Change password

In case your password is due for change (password policy duration), system will throw a pop-up informing that it is redirecting you to 'Change password' page. Enter user ID, existing password, new password (twice to confirm) and click 'Change password'.

Your password is older than <password policy time>. Please change your password.

You are being redirected to the change password Page.

Password change due message



NSE Parivartan Portal

Having difficulty navigating? Search here...

Change Password

userID
EXT_CE_USER

Existing Password New Password Confirm Password

Enter Existing Password Enter New Password Enter Confirm Password

Guidelines for password:

1. Password must be between "12-15" characters

2. Password must contain the following character types:

- Lowercase characters : a-z
- Uppercase character: A-Z
- Numeric character: 0-9
- Non alphanumeric special character: @ # \$ % & * /

[BACK TO MY DETAILS](#) [CHANGE PASSWORD](#)

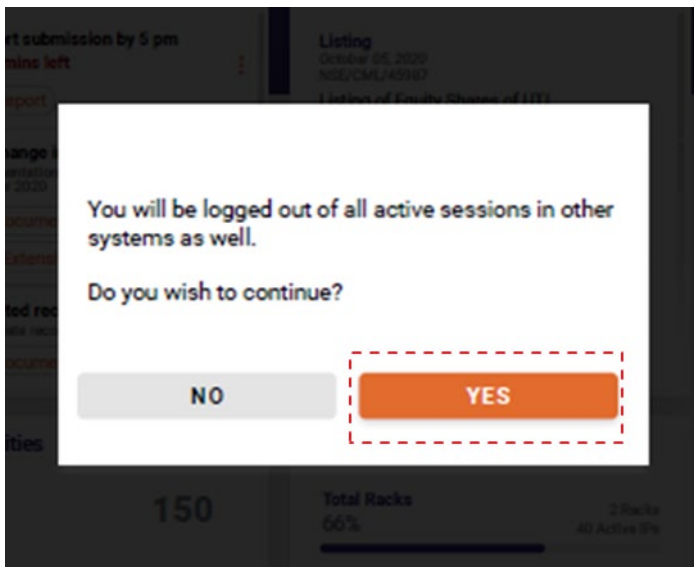
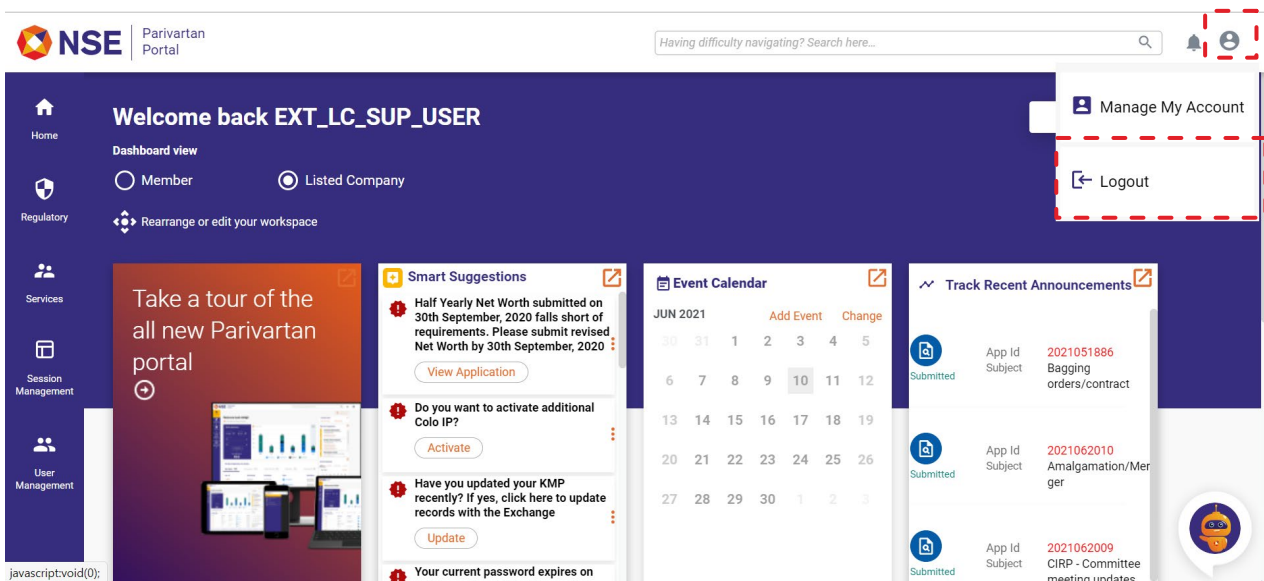
Change password screen

Note:

- Ensure new password adheres to provided guidelines
- If you have entered current password incorrectly for 5 consecutive attempts, your username will be blocked. Please contact your admin in such situation.

2.3 Logout

If you want to logout of your account, click the face icon on top right. Then click 'Logout'. Click on 'Yes' on the pop-up asking for confirmation for logging out of all active sessions.

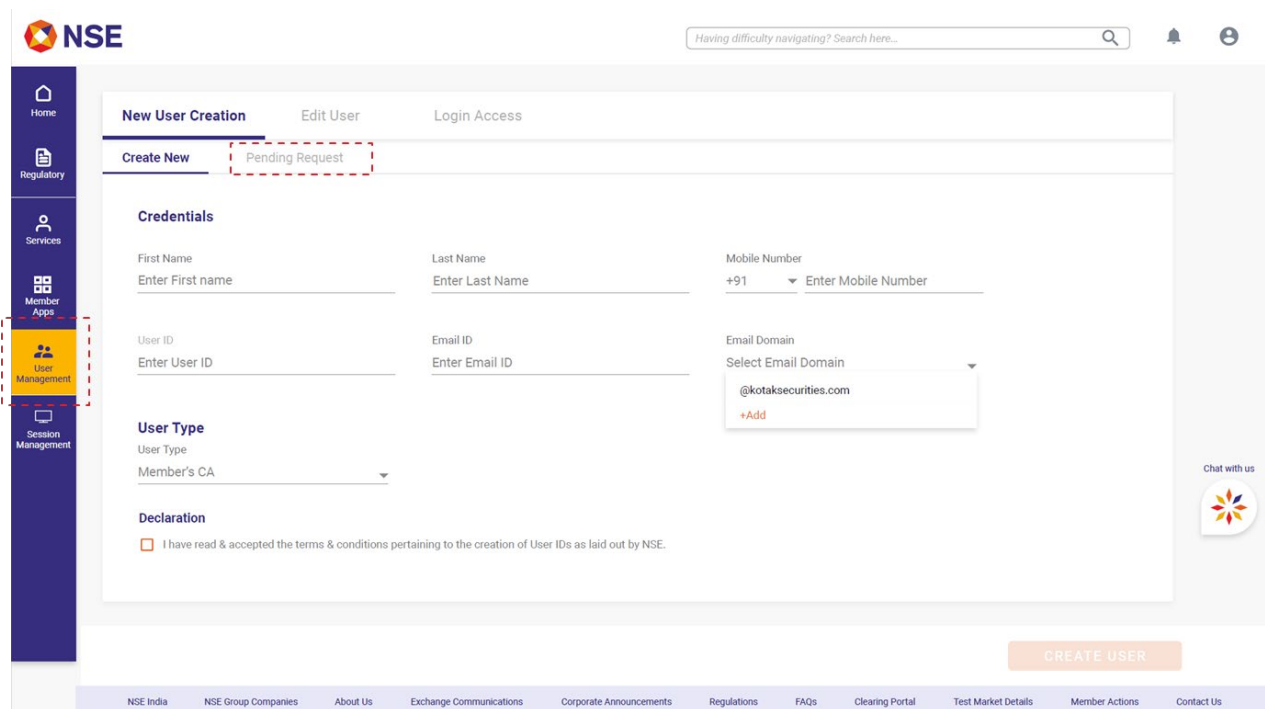


3 User Management

3.1 Create new user (access only to Admin)

3.1.1 Navigate to 'Create New' screen

Click on 'User Management' on left pane. 'New User Creation' screen with 'Create New' tab will open by default.



The screenshot displays the NSE New User Creation interface. On the left, a vertical navigation menu includes options like Home, Regulatory, Services, Member Apps, **User Management** (highlighted), and Session Management. The main panel is titled 'New User Creation' and contains three tabs: 'New User Creation', 'Edit User', and 'Login Access'. The 'New User Creation' tab is active and further divided into 'Create New' and 'Pending Request' sub-tabs. The 'Create New' sub-tab is selected, revealing a form with the following sections:

- Credentials:** Fields for First Name (Enter First name), Last Name (Enter Last Name), and Mobile Number (+91 Enter Mobile Number).
- User ID and Email ID:** Fields for User ID (Enter User ID) and Email ID (Enter Email ID).
- Email Domain:** A dropdown menu labeled 'Select Email Domain' with '@kotaksecurities.com' as the selected option and an '+Add' button.
- User Type:** A dropdown menu labeled 'User Type' with 'Member's CA' as the selected option.
- Declaration:** A checkbox labeled 'I have read & accepted the terms & conditions pertaining to the creation of User IDs as laid out by NSE.'.

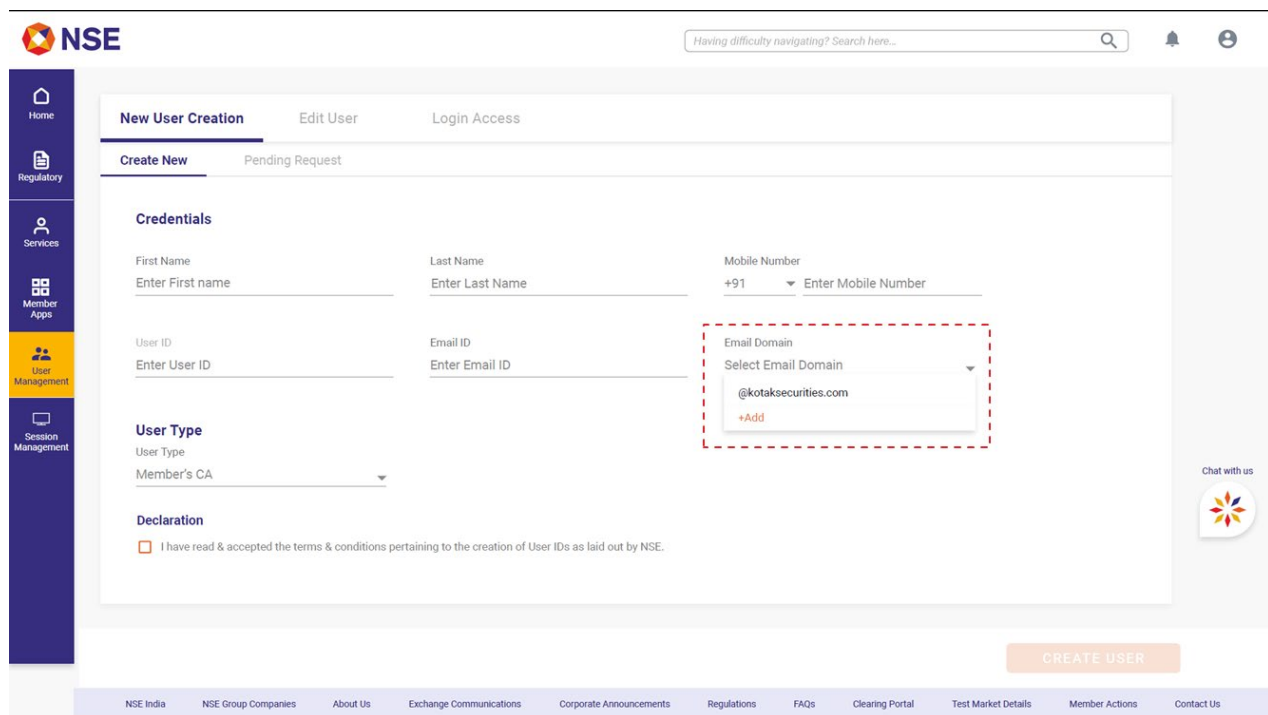
A 'CREATE USER' button is located at the bottom right of the form. The footer of the page contains a list of links: NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, Regulations, FAQs, Clearing Portal, Test Market Details, Member Actions, and Contact Us.

Note:

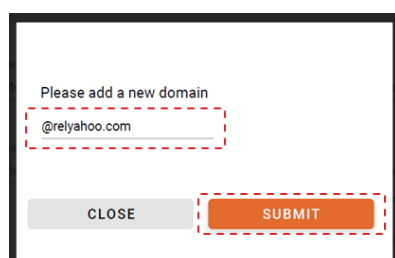
View any pending requests in 'Pending requests' tab

3.1.2 Select domain name from dropdown.

If domain name is not present, click 'Add'.



System will display a pop-up asking for new domain name. Enter a valid domain name and click 'Submit' to add your domain to the dropdown list.

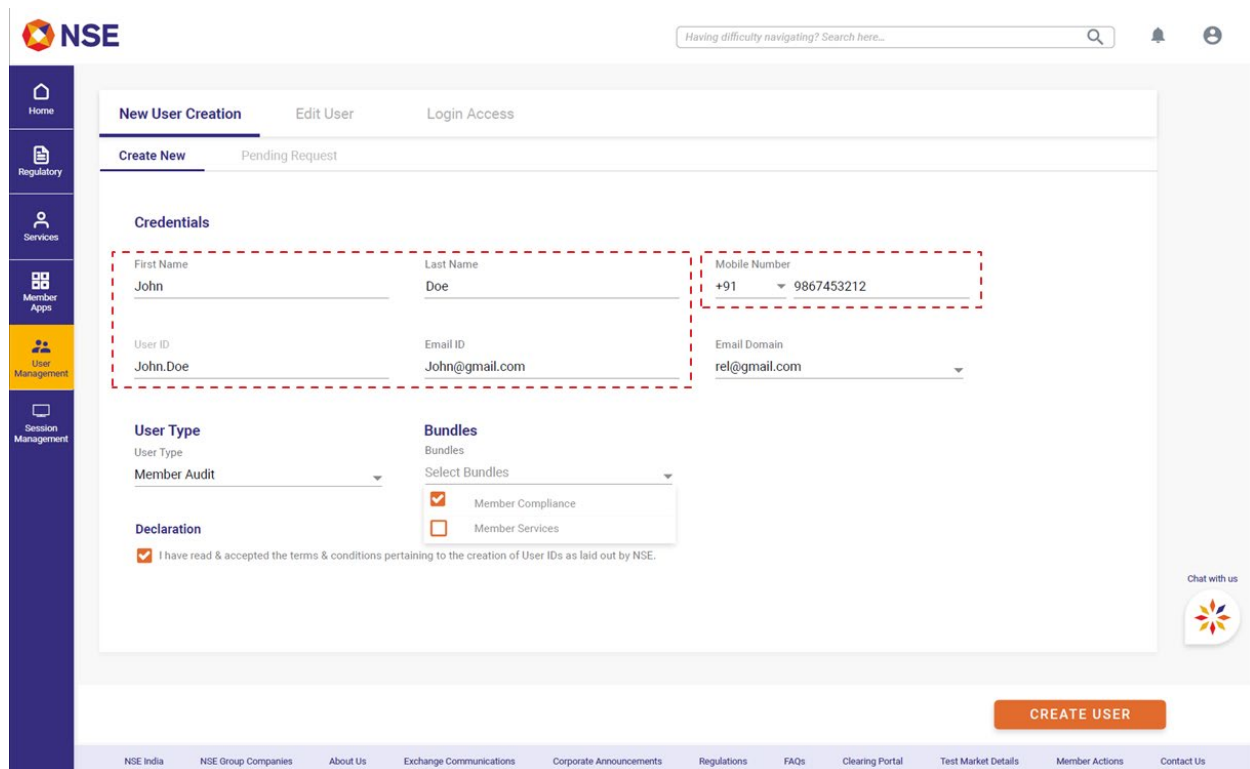


Note:

- Domains selected through dropdown & entered in the Email ID field should match for the user to be created
- If you enter an invalid domain, system will display an error message below the field.

3.1.3 Enter details

Enter credentials such as name, mobile number, user ID, and email ID.



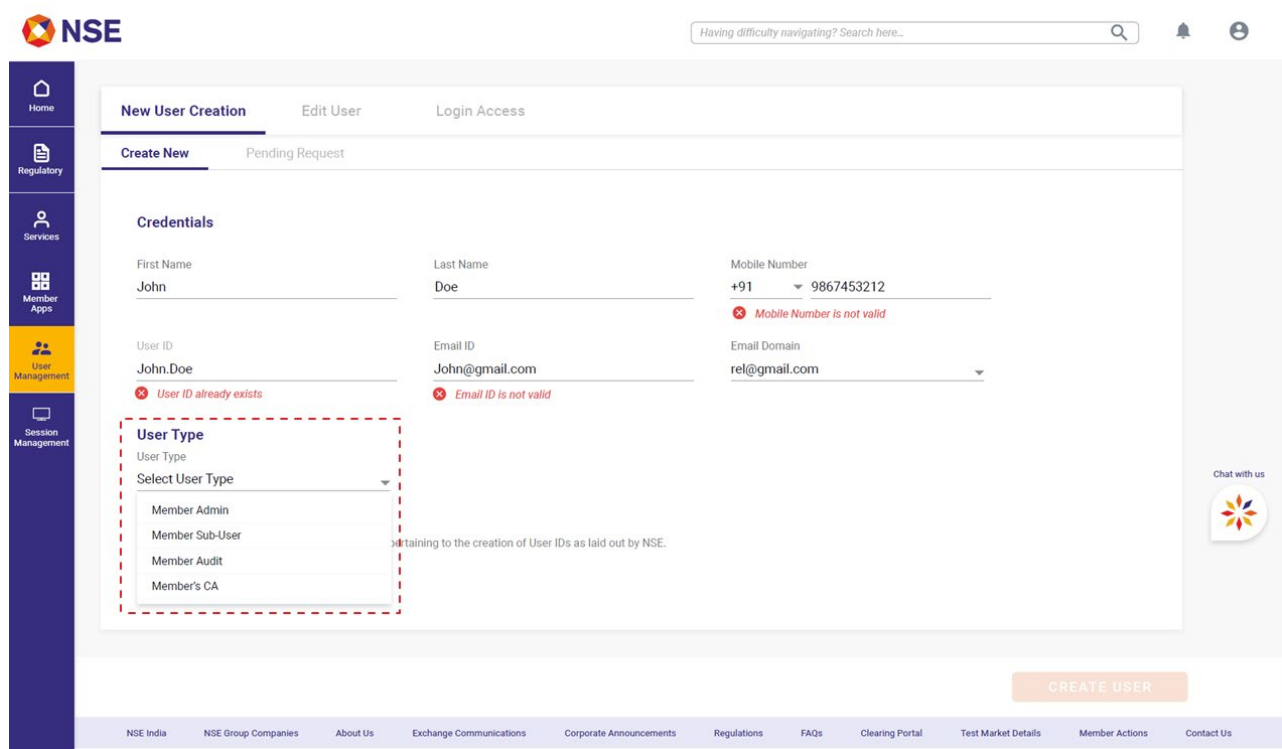
The screenshot shows the 'New User Creation' form in the NSE frontend. The form is divided into several sections: 'Credentials', 'User Type', 'Bundles', and 'Declaration'. The 'Credentials' section is highlighted with a red dashed border and contains fields for First Name (John), Last Name (Doe), Mobile Number (+91 9867453212), User ID (John.Doe), Email ID (John@gmail.com), and Email Domain (rel@gmail.com). The 'User Type' section has a dropdown menu set to 'Member Audit'. The 'Bundles' section has a dropdown menu set to 'Select Bundles' with two options: 'Member Compliance' (checked) and 'Member Services' (unchecked). The 'Declaration' section has a checkbox checked, indicating that the user has read and accepted the terms and conditions. A 'CREATE USER' button is located at the bottom right of the form. The left sidebar contains navigation links for Home, Regulatory, Services, Member Apps, User Management, and Session Management. The top right corner has a search bar and a notification bell icon. The bottom of the page features a footer with various links including NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, Regulations, FAQs, Clearing Portal, Test Market Details, Member Actions, and Contact Us.

Note:

- Criteria for user ID:
 - 4-32 alphanumeric char.
 - '@', '_' & '.' are allowed
 - Cannot contain common nouns like 'admin', 'superuser', etc.
- System will display error message below any field which does not the validation criteria.
- If user ID, email ID, mobile number matches any already existing record, system will display an error message.

3.1.4 Select User Type

If there are any validation errors, system will display corresponding error messages below the fields. Solve those errors. Click the 'User type' dropdown to select type of user.



The screenshot shows the 'New User Creation' form in the NSE frontend. The form is divided into two tabs: 'Create New' (active) and 'Pending Request'. The 'Create New' tab contains a 'Credentials' section with the following fields and values:

- First Name:** John
- Last Name:** Doe
- Mobile Number:** +91 9867453212 (Error: Mobile Number is not valid)
- User ID:** John.Doe (Error: User ID already exists)
- Email ID:** John@gmail.com (Error: Email ID is not valid)
- Email Domain:** rel@gmail.com

The 'User Type' dropdown is highlighted with a red dashed box. The dropdown menu is open, showing the following options:

- Member Admin
- Member Sub-User
- Member Audit
- Member's CA

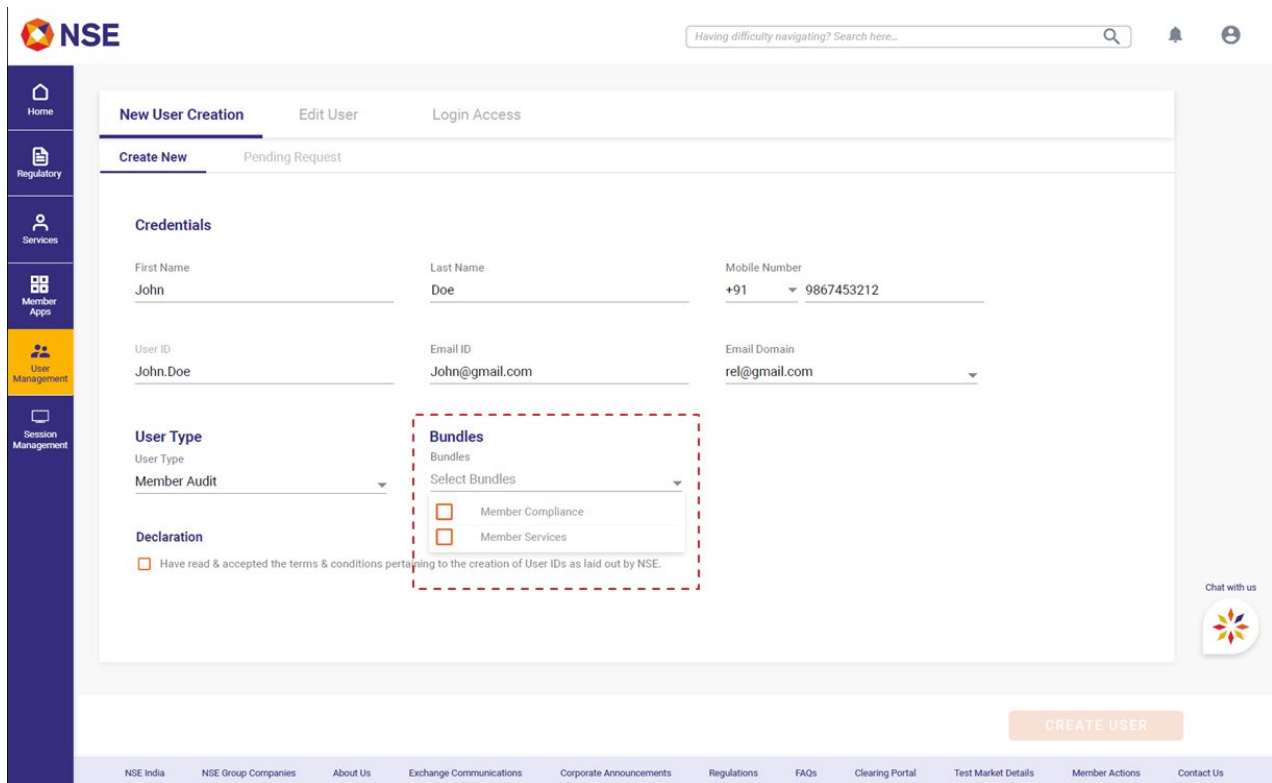
Below the dropdown, there is a note: "Maintaining to the creation of User IDs as laid out by NSE." At the bottom right of the form, there is a 'CREATE USER' button. The footer of the page contains links to various NSE resources: NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, Regulations, FAQs, Clearing Portal, Test Market Details, Member Actions, and Contact Us.

Note:

- There can only be 5 admins or superusers for a Member.
- If you select user type as 'Admin' and the number is exceeding 5, then system won't allow user creation.
- If type is 'Member CA', user must enter CA entity, CA membership no. and CA qualification.

3.1.5 Choose Bundles

As soon as you select the user type, the 'Bundles' dropdown will appear. Click on the dropdown and select bundles to be assigned to the user.



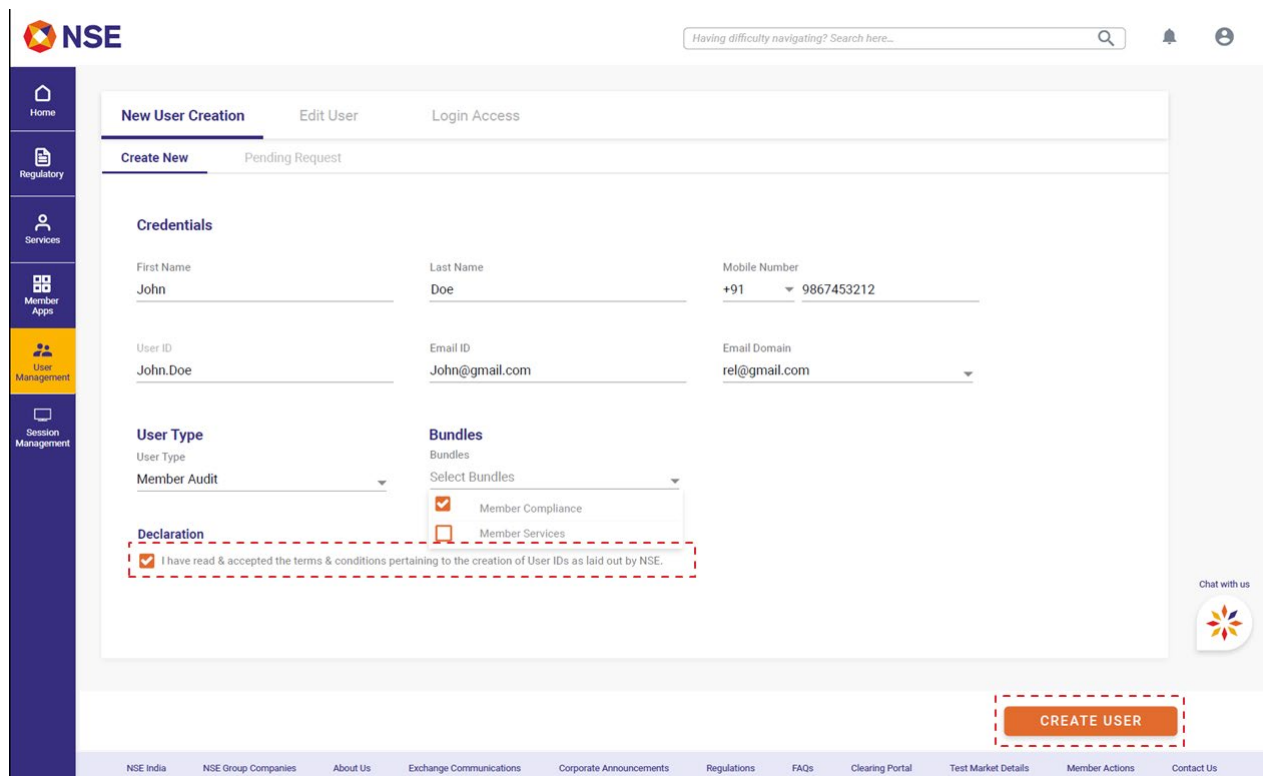
The screenshot shows the 'New User Creation' form in the NSE frontend. The form is divided into several sections: 'Credentials', 'User Type', and 'Declaration'. The 'User Type' dropdown is set to 'Member Audit'. The 'Bundles' dropdown is open, showing two options: 'Member Compliance' and 'Member Services'. The 'CREATE USER' button is located at the bottom right of the form.

Note:

- Bundles dropdown is auto-populated basis the user type selection.
- For some user types, bundles are not applicable.

3.1.6 Sign Declaration & Create User

Once bundles are selected, tick mark the declaration checkbox to agree to the terms and conditions. Click 'Create User' button.



NSE Having difficulty navigating? Search here...

New User Creation Edit User Login Access

Create New Pending Request

Credentials

First Name: John Last Name: Doe Mobile Number: +91 9867453212

User ID: John.Doe Email ID: John@gmail.com Email Domain: rel@gmail.com

User Type User Type: Member Audit

Bundles Bundles: Select Bundles

☒ Member Compliance ☐ Member Services

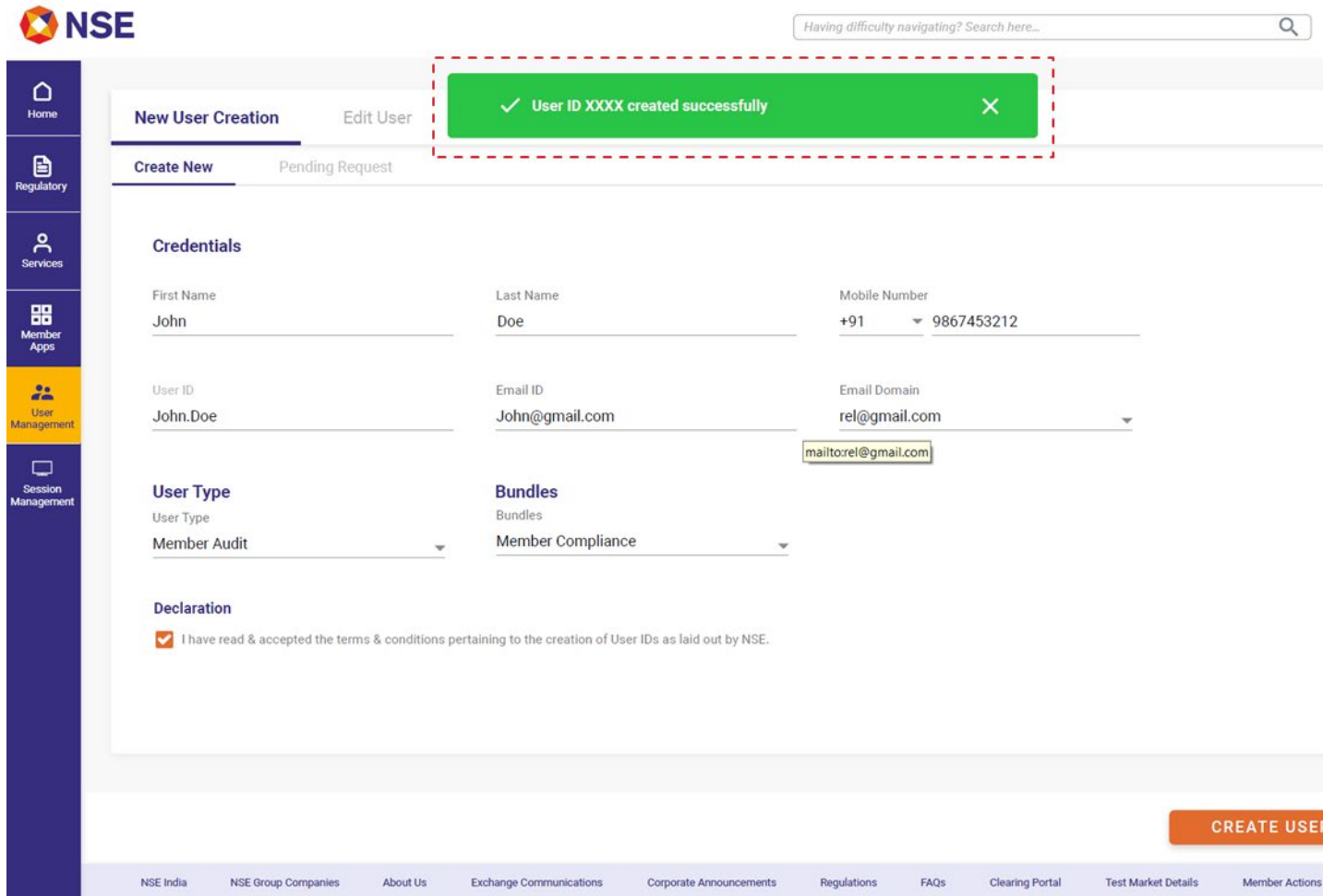
Declaration ☒ I have read & accepted the terms & conditions pertaining to the creation of User IDs as laid out by NSE.

CREATE USER

Chat with us

NSE India NSE Group Companies About Us Exchange Communications Corporate Announcements Regulations FAQs Clearing Portal Test Market Details Member Actions Contact Us

System will display a success message on top in green box. New user is created successfully. Instructions to set password and setup 2-factor authorization are sent to the user's email ID.



The screenshot shows the NSE New User Creation interface. A green success message box at the top states: "✓ User ID XXXX created successfully". The form includes the following sections:

- Credentials:**
 - First Name: John
 - Last Name: Doe
 - Mobile Number: +91 9867453212
 - User ID: John.Doe
 - Email ID: John@gmail.com
 - Email Domain: rel@gmail.com (with a tooltip showing mailto:rel@gmail.com)
- User Type:**
 - User Type: Member Audit
- Bundles:**
 - Bundles: Member Compliance
- Declaration:**
 - ☒ I have read & accepted the terms & conditions pertaining to the creation of User IDs as laid out by NSE.

A "CREATE USER" button is located at the bottom right of the form.

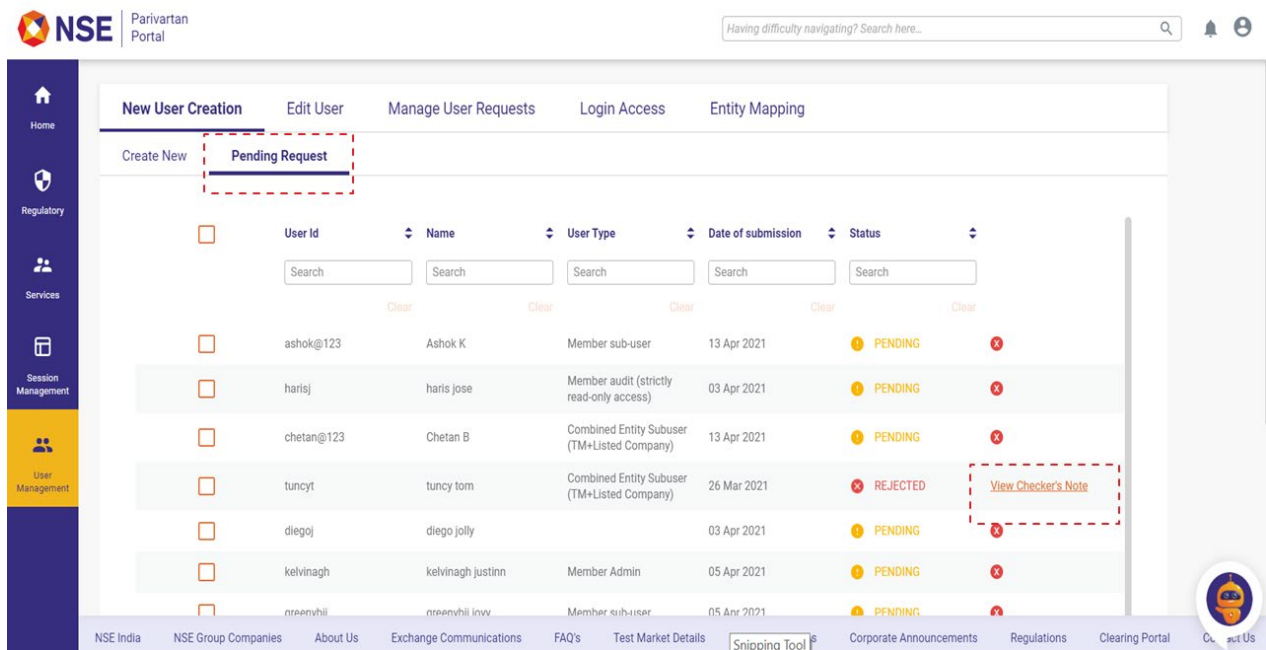
Note:

- Maximum 50 users can be created for an entity.
- If this limit has been reached, request will be sent to NSE for approval.

3.2 Pending requests

3.2.1 Check Status

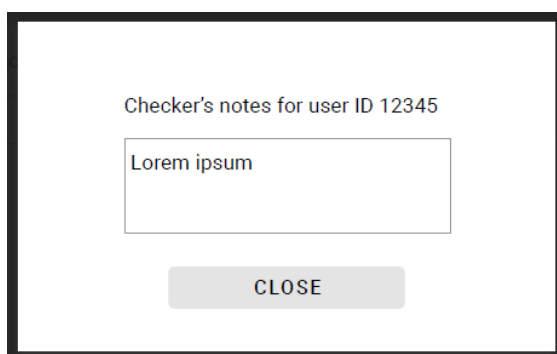
Click 'Pending request' on the menu bar to view pending requests. Click 'View checker's notes' and system will display a pop-up with comments from checker as to why the request has been rejected.



The screenshot shows the NSE Parivartan Portal interface. The 'Pending Request' tab is selected. The table below lists pending and rejected requests.

User Id	Name	User Type	Date of submission	Status
ashok@123	Ashok K	Member sub-user	13 Apr 2021	PENDING
harisj	haris jose	Member audit (strictly read-only access)	03 Apr 2021	PENDING
chetan@123	Chetan B	Combined Entity Subuser (TM+Listed Company)	13 Apr 2021	PENDING
tuncyt	tuncy tom	Combined Entity Subuser (TM+Listed Company)	26 Mar 2021	REJECTED
diegoj	diego jolly		03 Apr 2021	PENDING
kelvinagh	kelvinagh justinn	Member Admin	05 Apr 2021	PENDING
greenhill	greenhill low	Member sub-user	05 Apr 2021	PENDING

A 'View Checker's Note' link is visible next to the 'REJECTED' entry for 'tuncy tom'.



The screenshot shows a pop-up window titled 'Checker's notes for user ID 12345'. It contains a text area with the placeholder text 'Lorem ipsum' and a 'CLOSE' button.

Checker notes for request that has been rejected

3.2.2 Withdraw Request

Click on cross icon next to 'Status' column for withdrawing any pending request. System will throw a pop-up to confirm withdrawal. Click 'Yes'. System will then show a withdrawal success message on top.

User Id	Name	User Type	Date of submission	Status	
Search	Search	Search	Search	Search	
Clear	Clear	Clear	Clear	Clear	Clear
ashok@123	Ashok K	Member sub-user	13 Apr 2021	PENDING	
harisj	haris jose	Member audit (strictly read-only access)	03 Apr 2021	PENDING	
chetan@123	Chetan B	Combined Entity Subuser (TM+Listed Company)	13 Apr 2021	PENDING	
tuncyt	tuncy tom	Combined Entity Subuser (TM+Listed Company)	26 Mar 2021	REJECTED	View Checker's Note
diegoj	diego jolly		03 Apr 2021	PENDING	
kelvinagh	kelvinagh justinn	Member Admin	05 Apr 2021	PENDING	
greenvhii	greenvhii inw	Member sub-user	05 Apr 2021	PENDING	

Are you sure you want to withdraw your request?

NO
YES

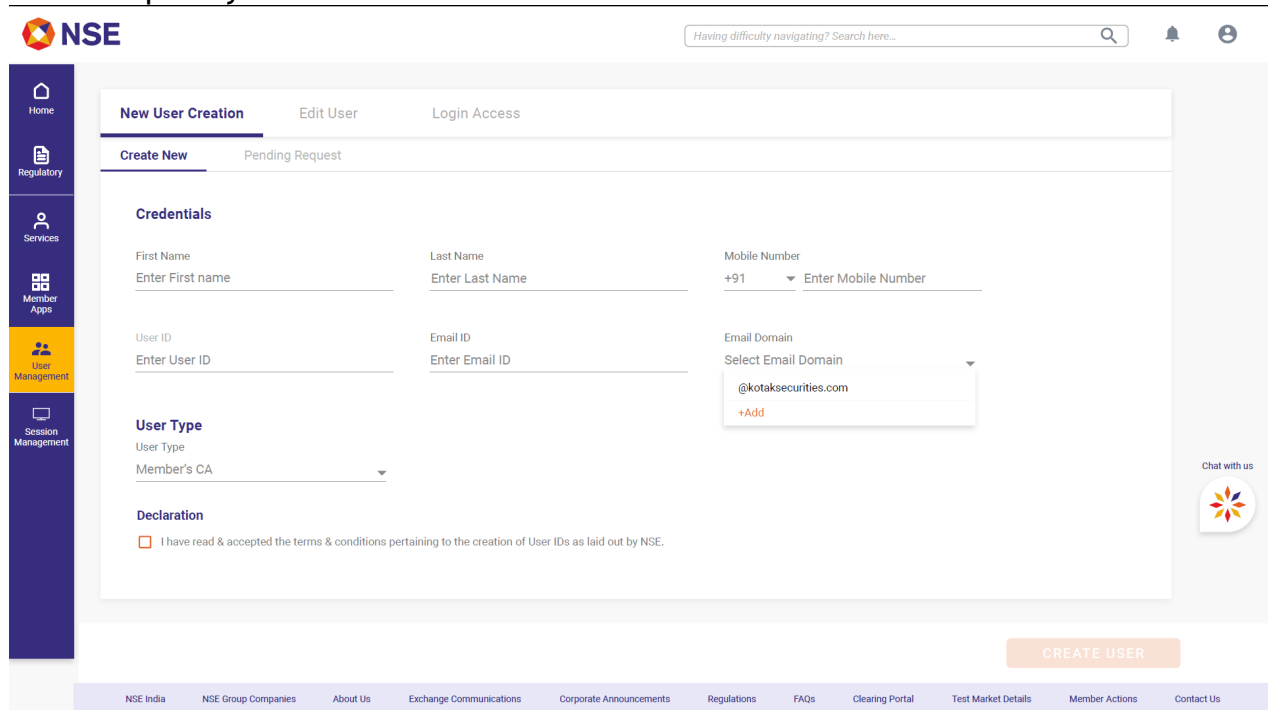
Request withdrawn successfully.
 ×

Request successfully withdrawn
message on top

3.3 Modify user access (access only to Admin)

3.3.1 Navigate to 'Edit user; screen

Click on 'User Management' on left pane. 'New User Creation' screen with 'Create New' tab will open by default.

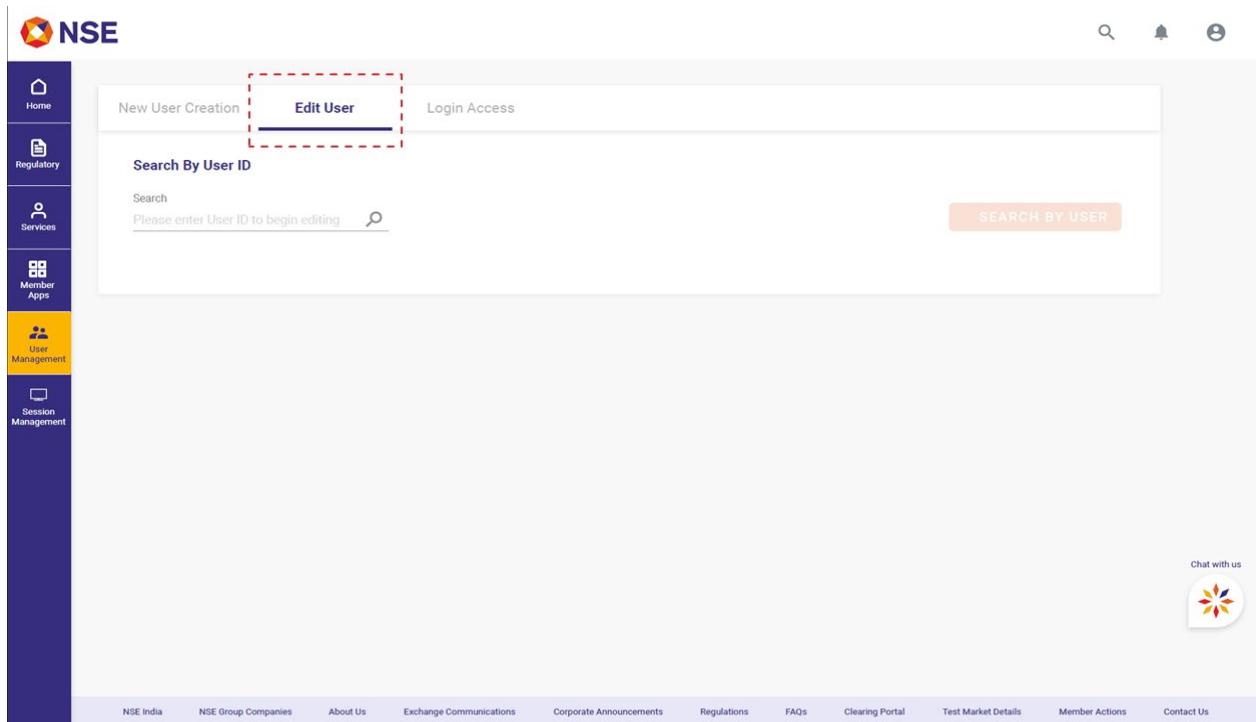


The screenshot displays the NSE New User Creation interface. The top navigation bar includes the NSE logo, a search bar with the placeholder text "Having difficulty navigating? Search here...", and notification and user icons. The left sidebar contains a vertical menu with icons for Home, Regulatory, Services, Member Apps, User Management (highlighted in orange), and Session Management. The main content area is titled "New User Creation" and features three tabs: "New User Creation", "Edit User", and "Login Access". Under the "New User Creation" tab, there are two sub-tabs: "Create New" (active) and "Pending Request". The "Create New" sub-tab contains the following sections:

- Credentials:**
 - First Name: Enter First name
 - Last Name: Enter Last Name
 - Mobile Number: +91 (dropdown) Enter Mobile Number
 - User ID: Enter User ID
 - Email ID: Enter Email ID
 - Email Domain: Select Email Domain (dropdown menu showing @kotaksecurities.com and +Add)
- User Type:**
 - User Type: Member's CA (dropdown)
- Declaration:**
 - ☐ I have read & accepted the terms & conditions pertaining to the creation of User IDs as laid out by NSE.

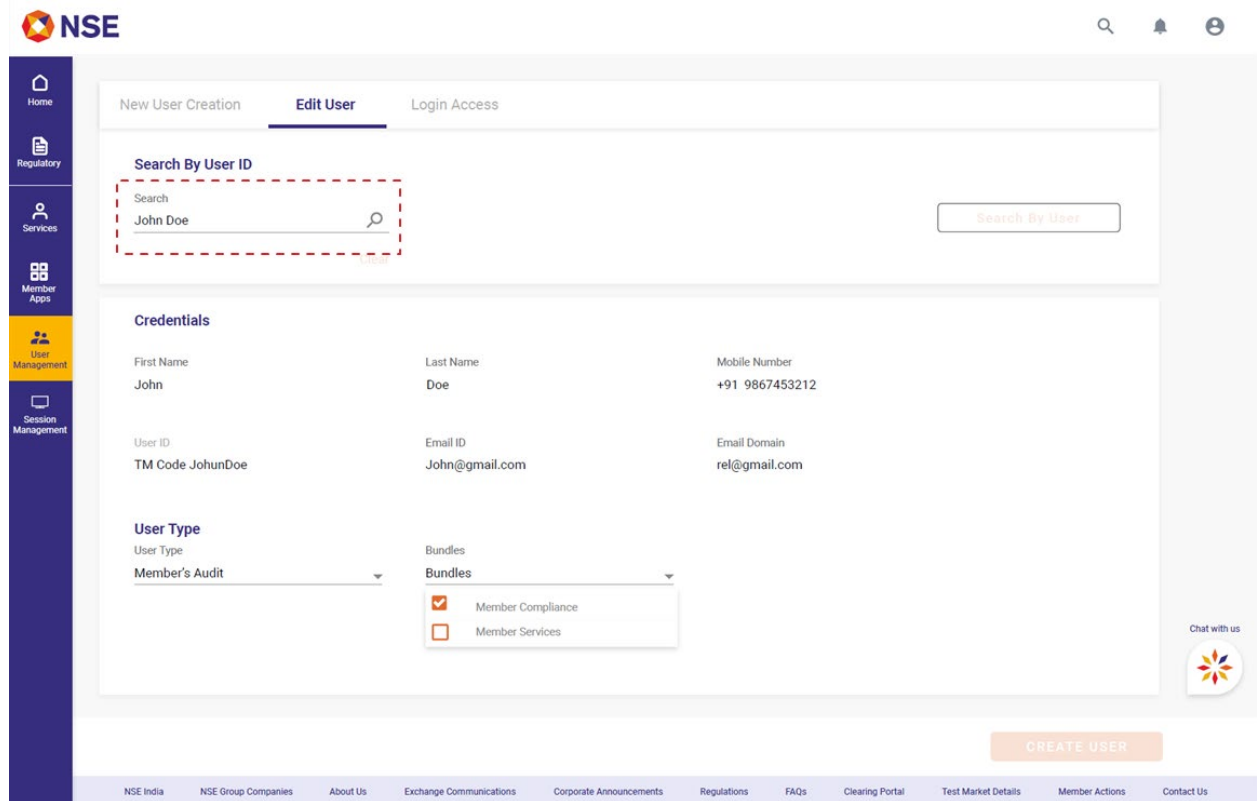
A "CREATE USER" button is located at the bottom right of the form. The footer contains a horizontal menu with links: NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, Regulations, FAQs, Clearing Portal, Test Market Details, Member Actions, and Contact Us.

Click 'Edit User' on the top horizontal bar to modify access rights for a user.



3.3.2 Search User ID

Enter the User ID of the user to be modified in the search box. Click 'Search by user'. Existing details of user will be displayed below. If there is any error in user ID, system will display error message below the user ID field.





Home

Regulatory

Services

Member Apps

User Management

Session Management

New User Creation

Edit User

Login Access

Search By User ID

Search

John Doe

Search By User

Credentials

First Name	Last Name	Mobile Number
John	Doe	+91 9867453212
User ID	Email ID	Email Domain
TM Code JohunDoe	John@gmail.com	rel@gmail.com

User Type

User Type

Member's Audit

Bundles

Bundles

☒ Member Compliance

☐ Member Services

Chat with us



CREATE USER

NSE India

NSE Group Companies

About Us

Exchange Communications

Corporate Announcements

Regulations

FAQs

Clearing Portal

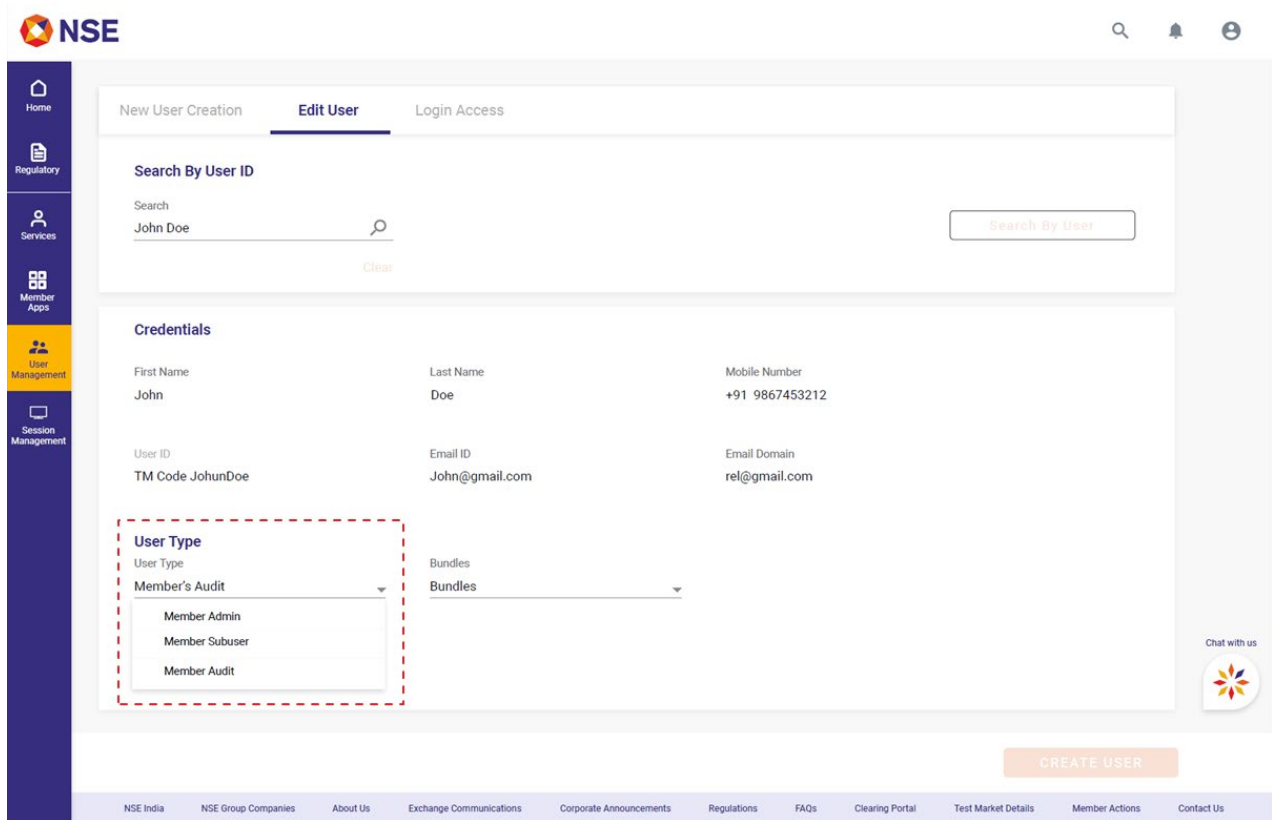
Test Market Details

Member Actions

Contact Us

3.3.3 Change User Type or Bundle access

Choose new user type from the dropdown (if needed).



NSE

Home Regulatory Services Member Apps **User Management** Session Management

New User Creation **Edit User** Login Access

Search By User ID

Search
John Doe

Credentials

First Name John	Last Name Doe	Mobile Number +91 9867453212
User ID TM Code JohunDoe	Email ID John@gmail.com	Email Domain rel@gmail.com

User Type

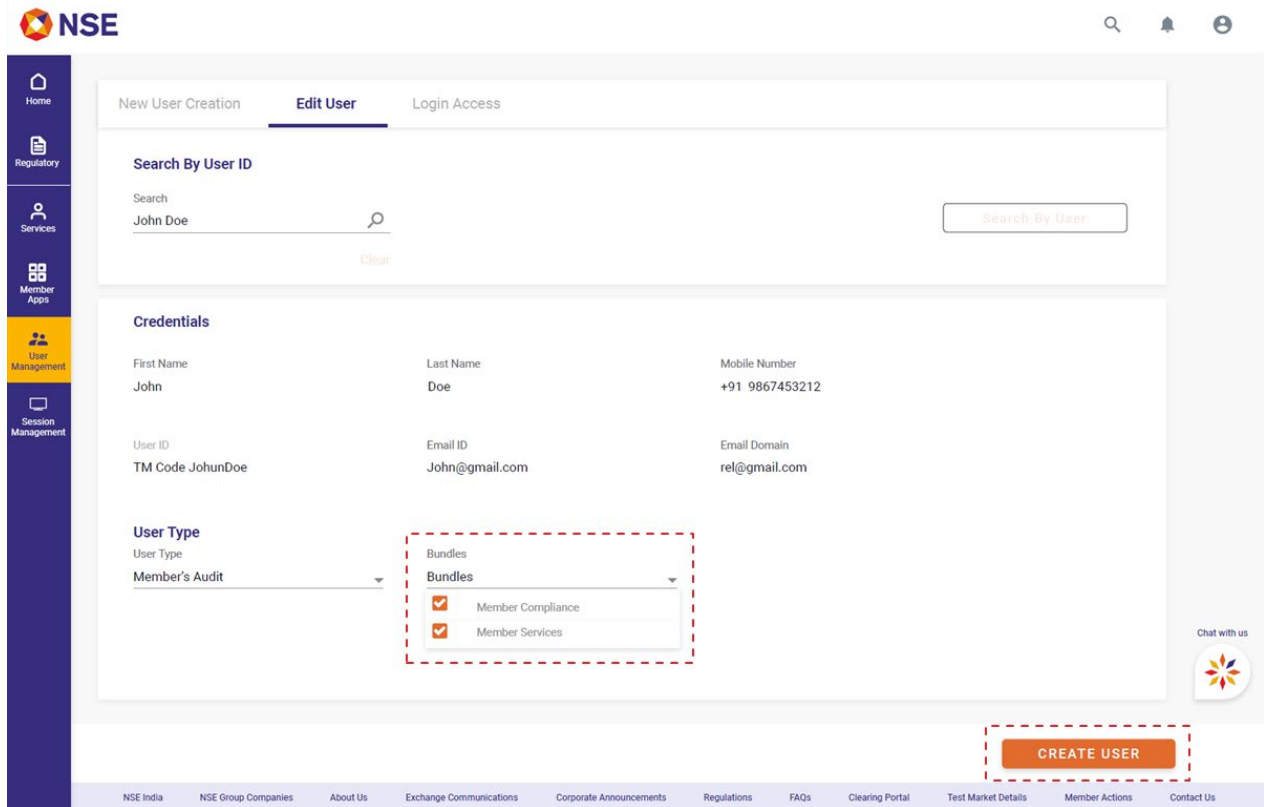
User Type
Member's Audit ▼

- Member Admin
- Member Subuser
- Member Audit

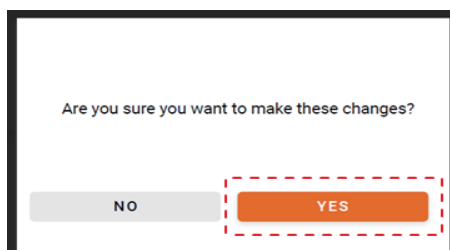
Bundles
Bundles ▼

NSE India NSE Group Companies About Us Exchange Communications Corporate Announcements Regulations FAQs Clearing Portal Test Market Details Member Actions Contact Us

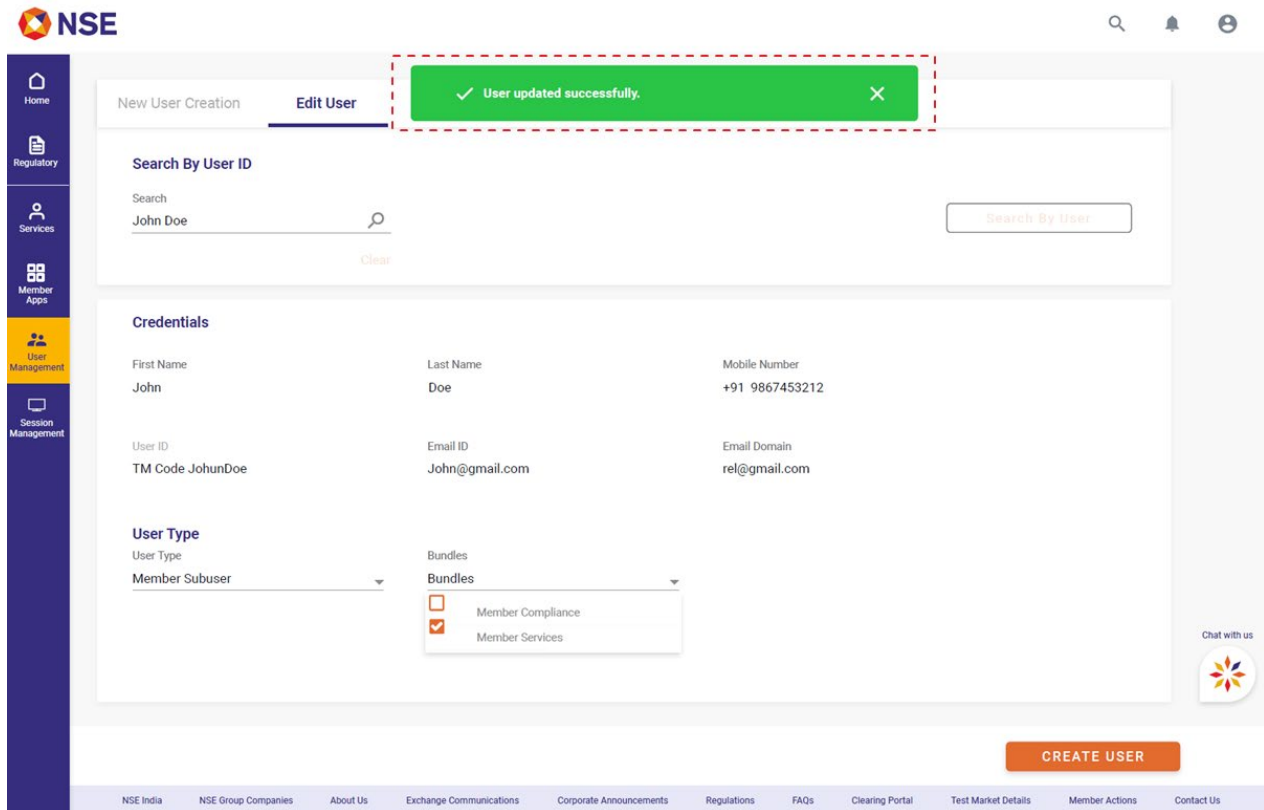
Select Bundles to be assigned to the user. This can be done with/ without changing the User Type. If User Type is modified, then bundles need to be selected afresh. Click 'Create User'.



On clicking 'Create User', system will display pop-up to confirm changes. Click 'Yes'.



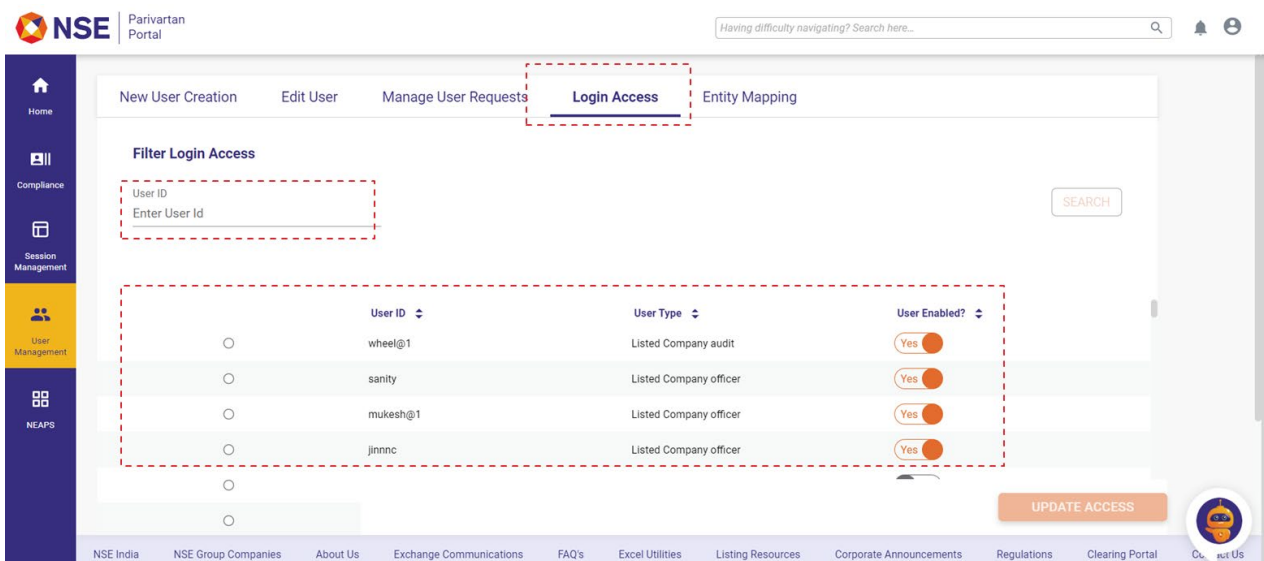
System will display a success message on top in green box stating that changes to user's access rights have been updated successfully.



The screenshot displays the NSE User Management interface. At the top, a green success message box states "User updated successfully." with a close button. The interface is divided into a sidebar with navigation options (Home, Regulatory, Services, Member Apps, User Management, Session Management) and a main content area. The main content area has tabs for "New User Creation" and "Edit User". Under the "Edit User" tab, there is a "Search By User ID" section with a search input field containing "John Doe" and a "Search By User" button. Below this is a "Credentials" section with fields for First Name (John), Last Name (Doe), Mobile Number (+91 9867453212), User ID (TM Code JohunDoe), Email ID (John@gmail.com), and Email Domain (rel@gmail.com). The "User Type" section shows "Member Subuser" selected. A "Bundles" dropdown menu is open, showing "Member Compliance" and "Member Services" with checkboxes. At the bottom right, there is a "CREATE USER" button. The footer contains a navigation bar with links to NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, Regulations, FAQs, Clearing Portal, Test Market Details, Member Actions, and Contact Us.

3.3.4 Activate/deactivate user login

Click 'Login access' on the top horizontal bar to activate or deactivate users' login. Search user ID in search box and click 'Search' to modify login access for specific user. You can view user status in the user list given below.



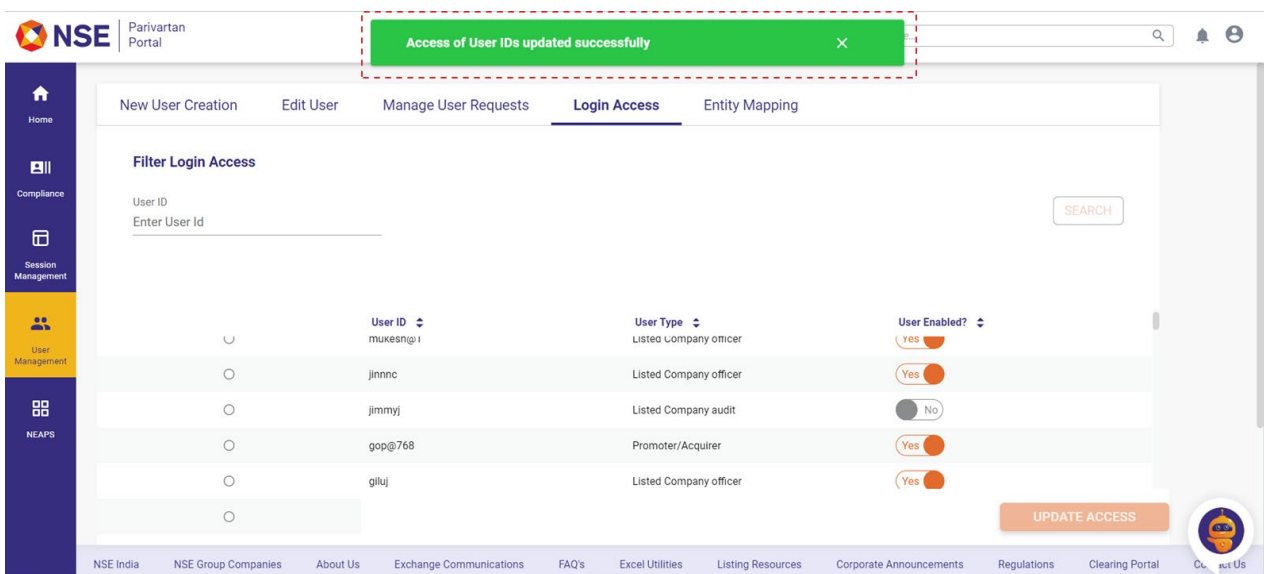
Filter Login Access

User ID
Enter User Id SEARCH

User ID	User Type	User Enabled?
wheel@1	Listed Company audit	Yes
sanity	Listed Company officer	Yes
mukesh@1	Listed Company officer	Yes
jinnnc	Listed Company officer	Yes

UPDATE ACCESS

System will display a success message on top in green box stating that user access has been updated successfully.



Access of User IDs updated successfully

Filter Login Access

User ID
Enter User Id SEARCH

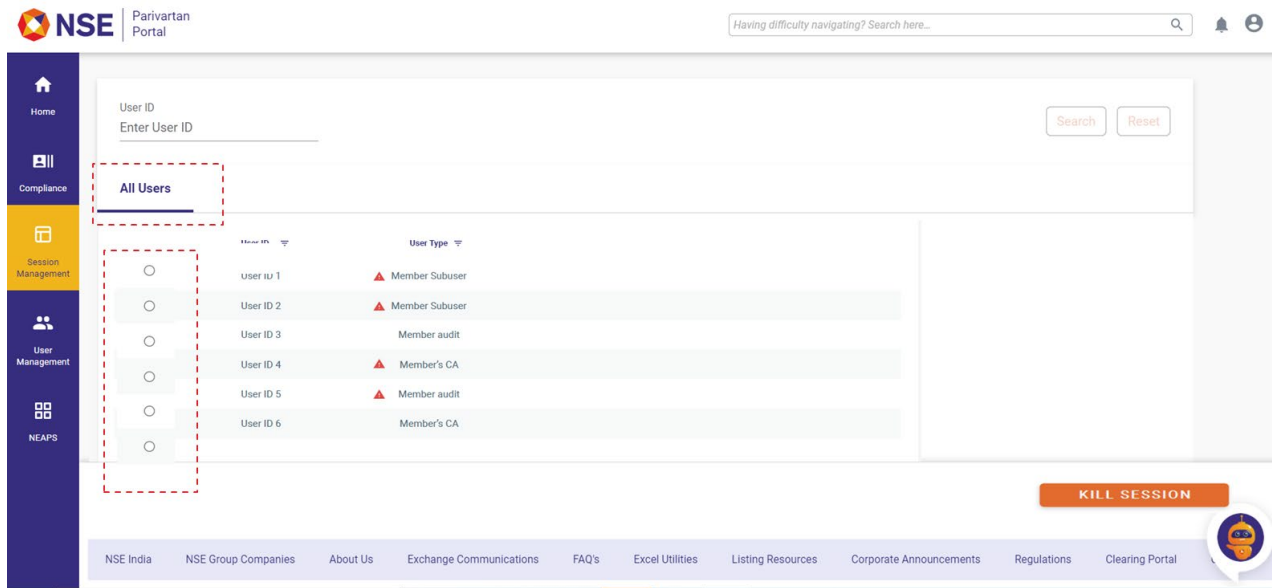
User ID	User Type	User Enabled?
mukesh@1	Listed Company officer	Yes
jinnnc	Listed Company officer	Yes
jimmyj	Listed Company audit	No
gop@768	Promoter/Acquirer	Yes
giluj	Listed Company officer	Yes

UPDATE ACCESS

4 Session management (access only to Admin)

4.1 Navigate to 'All Users' screen

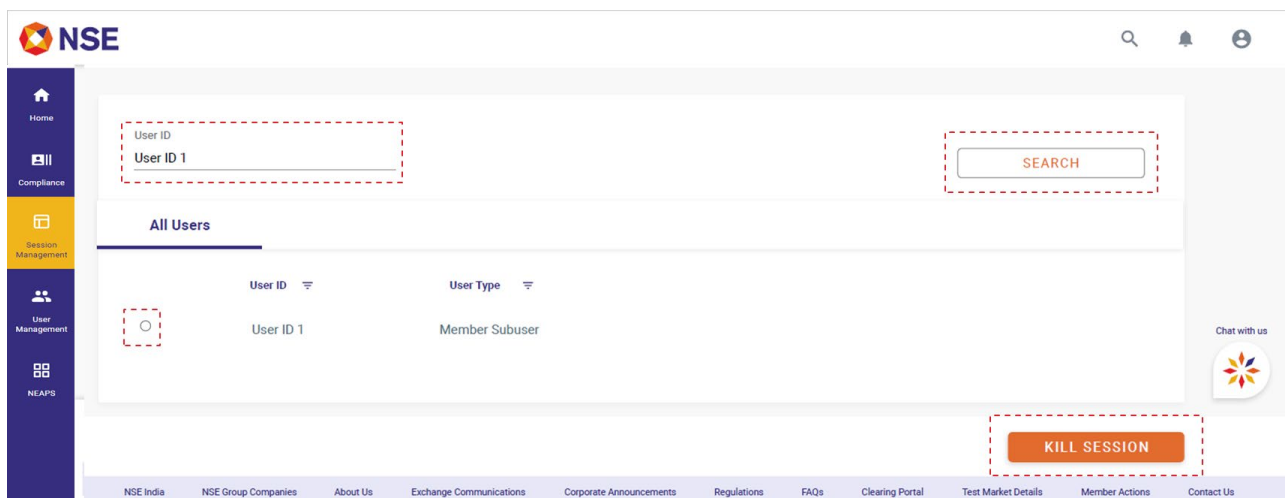
Click on 'Session Management' on left pane. 'All users' screen will open by default.



The screenshot shows the NSE Parivartan Portal interface. The left sidebar contains navigation links: Home, Compliance, Session Management (highlighted), User Management, and NEAPS. The main content area has a search bar for 'User ID' with 'Enter User ID' text and 'Search' and 'Reset' buttons. Below the search bar is a table titled 'All Users' with columns 'User ID' and 'User Type'. The table lists six users: User ID 1 (Member Subuser), User ID 2 (Member Subuser), User ID 3 (Member audit), User ID 4 (Member's CA), User ID 5 (Member audit), and User ID 6 (Member's CA). A 'KILL SESSION' button is located at the bottom right of the table. The footer contains various links: NSE India, NSE Group Companies, About Us, Exchange Communications, FAQ's, Excel Utilities, Listing Resources, Corporate Announcements, Regulations, Clearing Portal, and a chat icon.

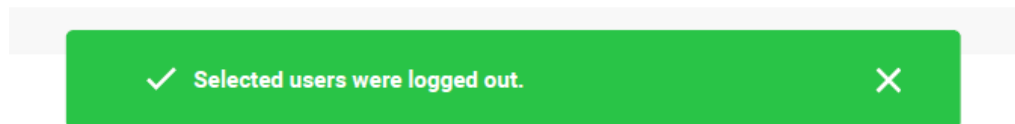
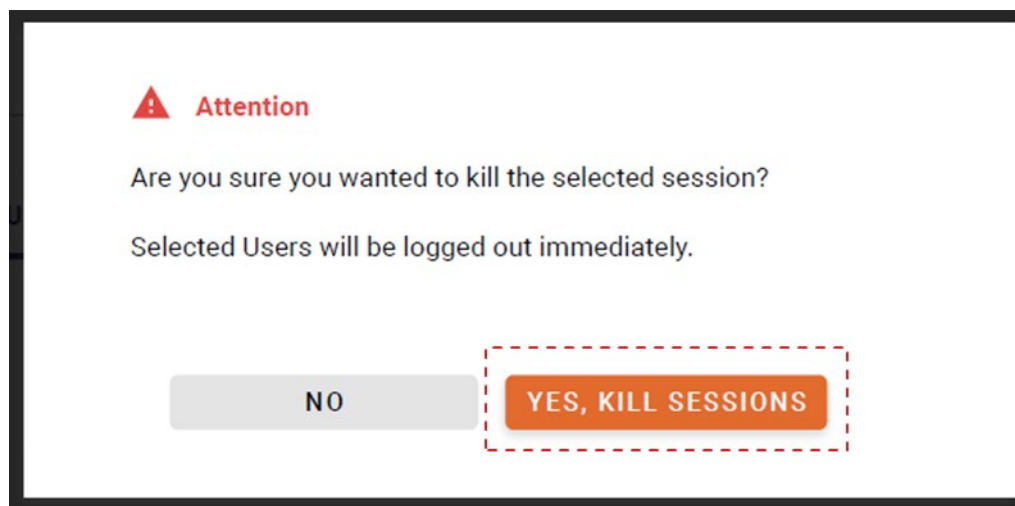
4.2 Search User ID & Kill Session

Search by typing specific user IDs in search box and click 'Search'. If search is valid, results will be displayed in table below. Select checkbox against that user and click 'Kill session'.



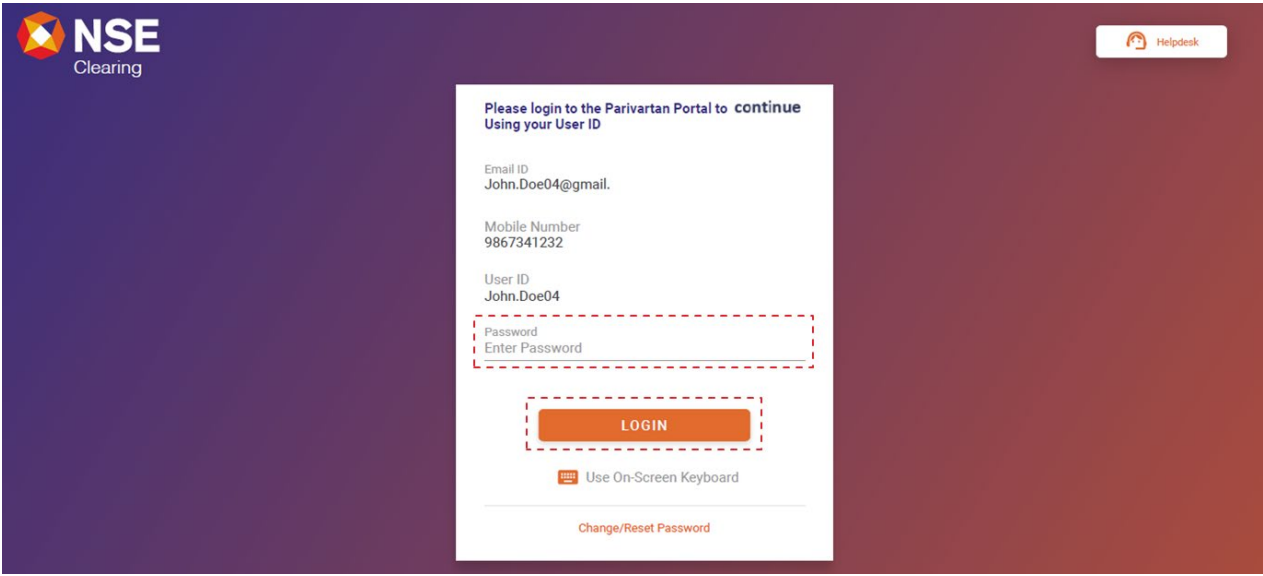
The screenshot shows the NSE Parivartan Portal interface after a search. The search bar contains 'User ID 1' and the 'SEARCH' button is highlighted. The table titled 'All Users' now shows only one result: User ID 1 (Member Subuser). A checkbox is visible next to the user ID. The 'KILL SESSION' button is highlighted at the bottom right of the table. The footer contains various links: NSE India, NSE Group Companies, About Us, Exchange Communications, Corporate Announcements, Regulations, FAQ's, Clearing Portal, Test Market Details, Member Actions, and Contact Us.

System will display pop-up asking for confirmation to kill selected sessions. Click 'Yes, kill sessions' to logout selected users immediately. System will display a success message on top in green box stating that selected users have been logged out successfully.



5 Recertify user

Your registered email ID will receive an email asking you to recertify your account for security reasons every 3 months. Click the link in email to reach login screen. Enter your current password and click 'Login' (other details pre-populated). If password is correct, you will be considered certified.



NSE
Clearing

Helpdesk

Please login to the Parivartan Portal to continue
Using your User ID

Email ID
John.Doe04@gmail.

Mobile Number
9867341232

User ID
John.Doe04

Password
Enter Password

LOGIN

Use On-Screen Keyboard

Change/Reset Password

Note:

- If user does not recertify within 15 days of receiving the email, his/her user ID will be disabled.
- User would be barred from logging-in in future and would be asked to contact Member company's administrator.