

Customer Brief

User manual: document management portal

August 2020

The portal gives you quick and easy access to your account information.

Access to Safe Disposal Certificates, proof of delivery, invoices as well as your latest statement.

You can now place your order online and receive updates on the progress of your order.

You can also provide feedback on service provided by submitting a compliment or complaint online. Information submitted will flow into our Corrective Action Preventive Action (CAPA) system.

System prerequisites

A modern and up to date browser such as Mozilla Firefox or Google Chrome is required to use this application.

JavaScript needs to be enabled and the Pop-up blocker needs to be deactivated.

To view the documents, you will need Adobe Acrobat Reader.

If you encounter problems in accessing the site, please escalate the matter to your I.T. Department as there may be security limitations imposed on your network that may not allow you access to our portal.

Step one

Log onto our website www.compasswasteservices.co.za and click on the “Customer Login” found at the top right-hand corner of your screen.



Step two

This will take you to the landing page.

A user manual can be downloaded (link at bottom of page) from the landing page.

Select “Log in” (top right corner) to navigate to the login page.

Insert your username and password into the appropriate fields on the login page.

Your username and password can be found in your welcome letter.

If you do not have your username and password, you can request this from our customer service team sales@compass.za.net or from your sales executive.

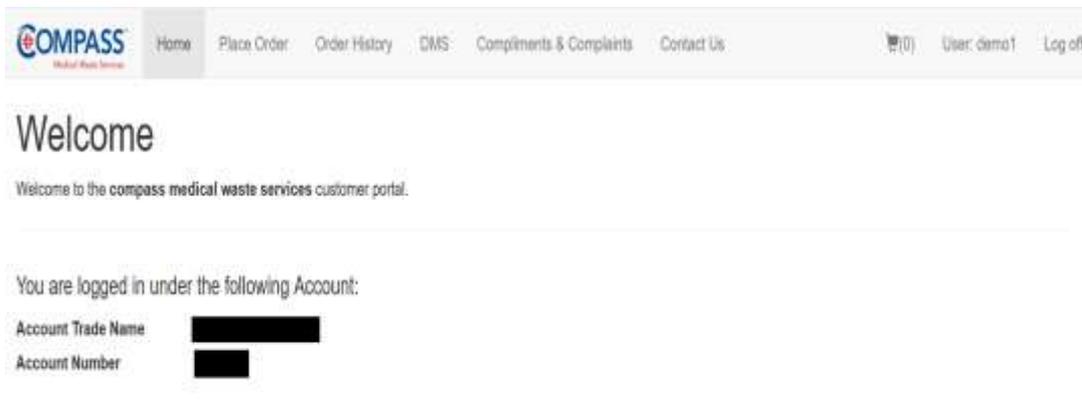
Step three

You have now successfully accessed your account via our on-line document management portal (DMS).

Contents

1. Landing page
2. Setting up an email address
3. Placing an order or Requesting a quote
4. Checkout process
5. Order history
6. Document Management System (DMS) and reports
7. Compliments and complaints

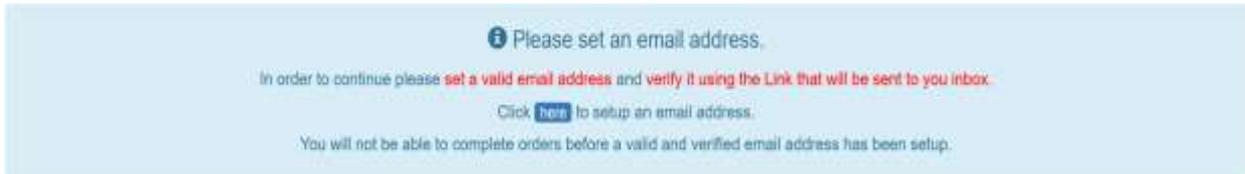
1. Landing Page



Upon logging into the application, you will be met with a page like the image above. The **tradename** and **account number** associated with your credentials will always be displayed on the landing page, however if your credentials have Group level access, only the associated group will be displayed.

Note the username “demo1” on the top right-hand corner of the image above, this will always display the current user, clicking on the username will take you to the settings page.

If you have not setup an email address you will receive the notification below, which informs you that an email address has not been setup. **An email address is required to place orders.**



2. Setting up an email address

To setup an email address click on the button located within the notification as seen above or alternatively click on your username located on the top right side of the page.

Clicking on the blue “here” button in the notification or the username will result in the page below being displayed:



Click on the “Set your Email Address” text, this will take you to the email input form as seen below:



Enter the email address that you would like to use and submit it by clicking “Save”. If done correctly you will be taken back to the settings page as seen below:2



Note that the email address has not been verified, to complete the process, you will have to click on a link that will be emailed to the address you specified.

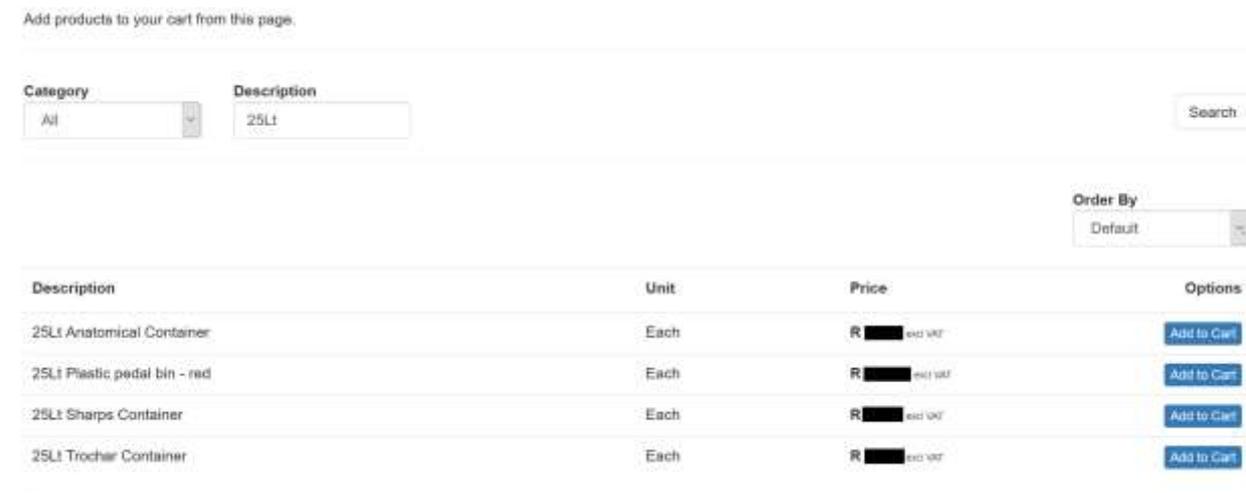
After clicking on the link mentioned above, if you return to the settings page as seen below you will notice that your chosen email address has been verified.



3. Placing an Order or Requesting a Quote

To get started on placing an order click on “Place Order” (on the Navbar), this will take you to the product selection page as seen below.

In order to request a quote, you will have to complete the order process described below.

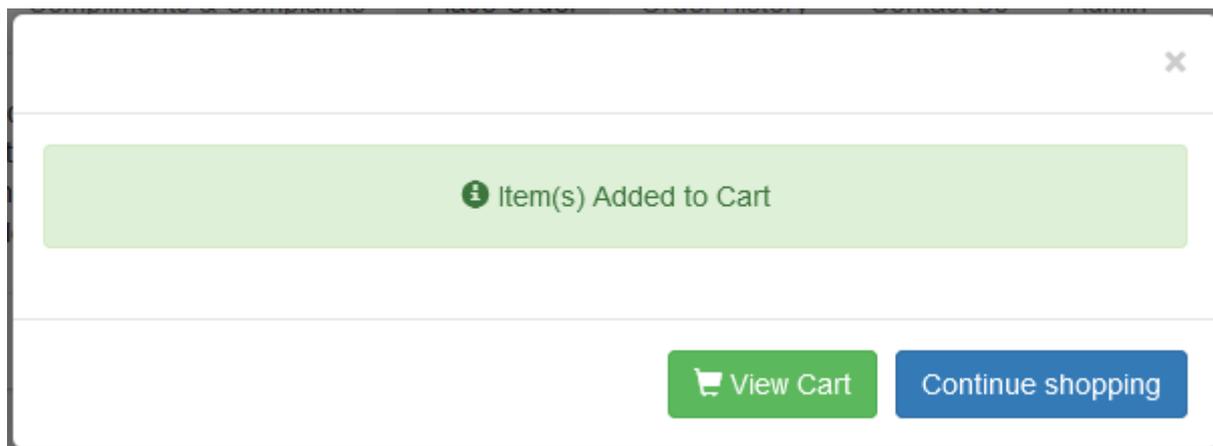


Filter products using the “Category” dropdown or alternatively search by description.

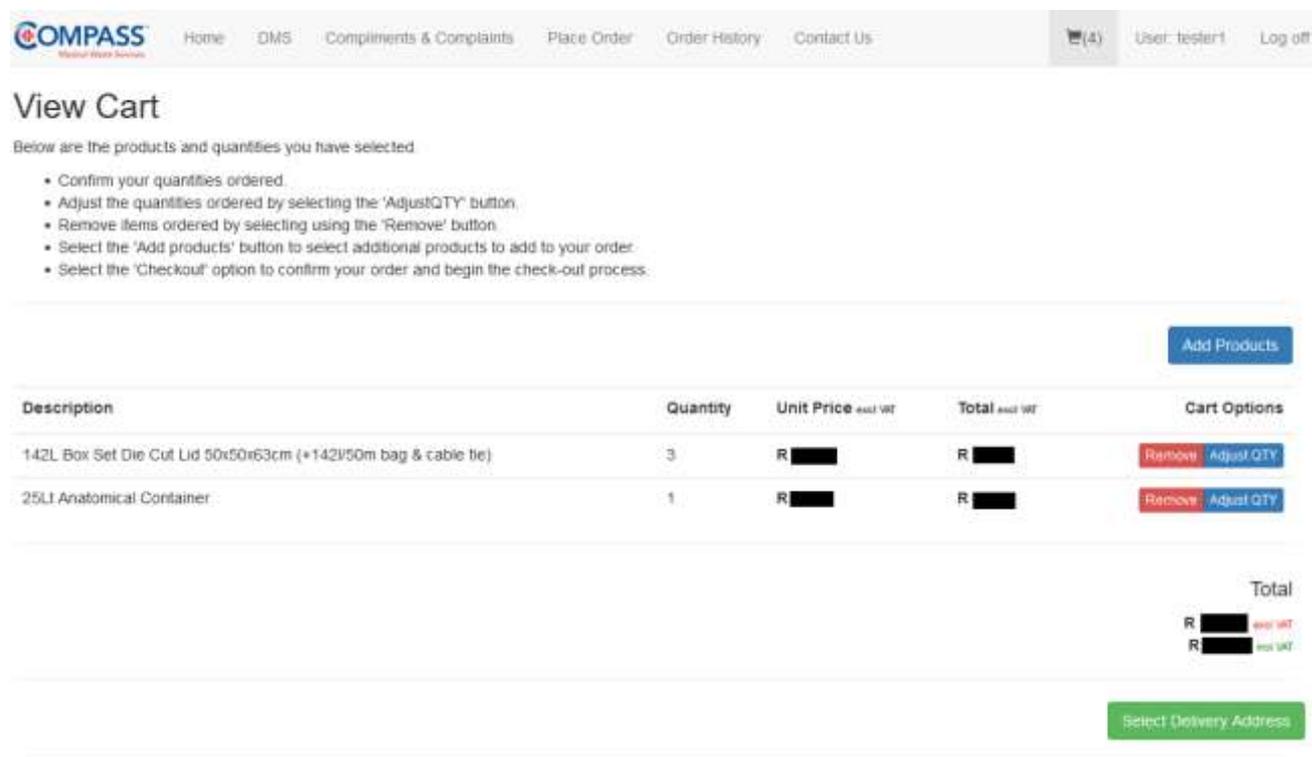
Click “Add to Cart” as seen below, then select a quantity and click confirm to add a product to your cart.



After the product is added you will be presented with the option to continue shopping or proceed to the cart review page by clicking on the green “View Cart” button.



Once you have selected all the products you need, click on the cart icon (navbar) to review your selections as seen below.



From the cart page you can remove items by clicking “remove” or adjust the quantity by clicking “Adjust QTY”.

4. Checkout Process or Saving Quote

If you are happy with your selection, proceed to checkout by clicking the “Select Delivery Address” button which will take you to the delivery location selection page as seen below.

Select Delivery Address

Please select the site/address to where your order must be delivered from the selection below.
Note only addresses pre-registered with Compass Medical Waste Services will be available for selection.

Site Name/Address

Trade Name	Site Name	Street Address	Select
			<input type="button" value="Select"/>
			<input type="button" value="Select"/>

Delivery locations can be filtered by site name or address.

After selecting a delivery site, you will be taken to the order review page as seen below:

Confirm Delivery Site

Account Trade Name

Account Number

Site Name

Street Address

Payment Term 30 Days

Confirm Internal Reference

Ordered By Please submit the name of the individual placing the order (for communication purposes).

Purchase Order Number A purchase order number or any alternative reference is required when placing an order.

Notification Email (Optional) Please submit an email address to receive notifications if required.

Confirm Items

Description	Quantity	Price <small>incl VAT</small>	Total <small>incl VAT</small>
142L Box Set Die Cut Lid 50x50x63cm (+142l/50m bag & cable tie)	3	R <input type="text"/>	R <input type="text"/>
25Lt Anatomical Container	1	R <input type="text"/>	R <input type="text"/>

Payment is due 30 Days from invoice date.

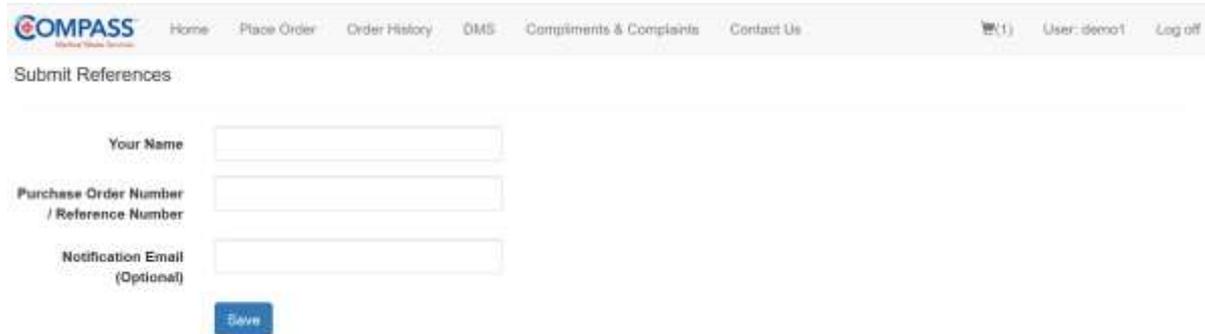
Total
R incl VAT
R incl VAT

Your order will be submitted and processed. Delivery will take place as per your booked days, operating hours and in accordance with our route schedule.
Once you have confirmed your order you will be advised that your order has been successfully placed, inclusive of a reference number.
Please take note of this reference number and provide to our customer service team in the event you have any queries in regards to your order placed.

Use the review page to ensure that all the order details are correct and to provide references as seen below, by clicking on the “Add References” button.

The name of the person placing the order and a reference number are both required for correspondence purposes. An example of a reference number could be a purchase order number.

Note when requesting a quote only the name of the requester’s name is required.



The screenshot shows the 'Submit References' form in the COMPASS system. The form includes three input fields: 'Your Name', 'Purchase Order Number / Reference Number', and 'Notification Email (Optional)'. A blue 'Save' button is located below the fields. The top navigation bar includes links for Home, Place Order, Order History, DMS, Compliments & Complaints, and Contact Us, along with a shopping cart icon, user information (User: demo1), and a Log off link.

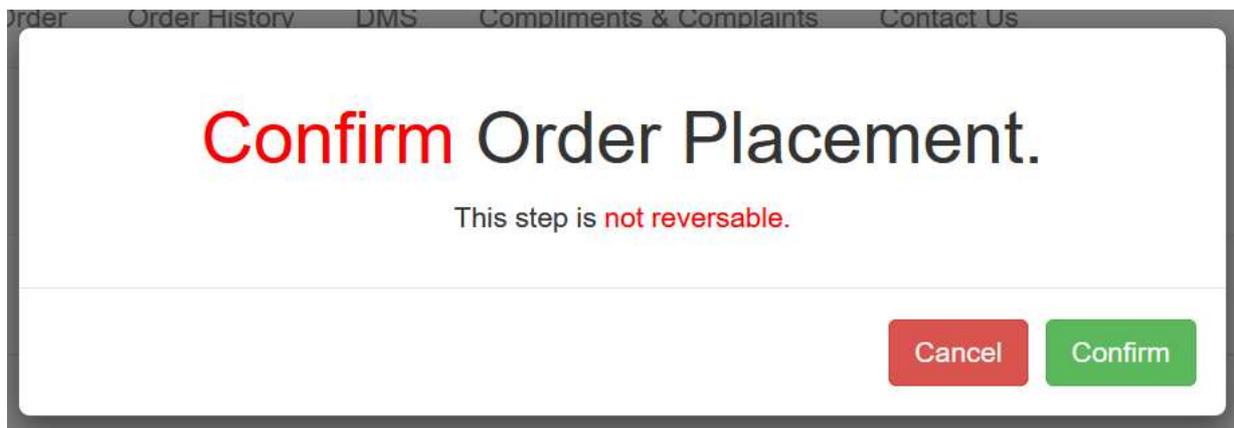
If you are satisfied with the content of your order, you now have two options.

Option 1: Confirm and Place the order.

Option 2: Save the order as a quote, which will allow you to download and print a Physical copy, additionally you can accept saved quotes at a later stage.

Accepting a quote will convert it into an order, this can be done from the order/quote details page.

To proceed with option 1 (placing an order), click on the “Place Order” button.



Then confirm on the confirmation dialog.

After confirmation you will see the page below:

Your order was placed successfully

Order Reference Number: 2048

Thank you for placing your order with Compass.

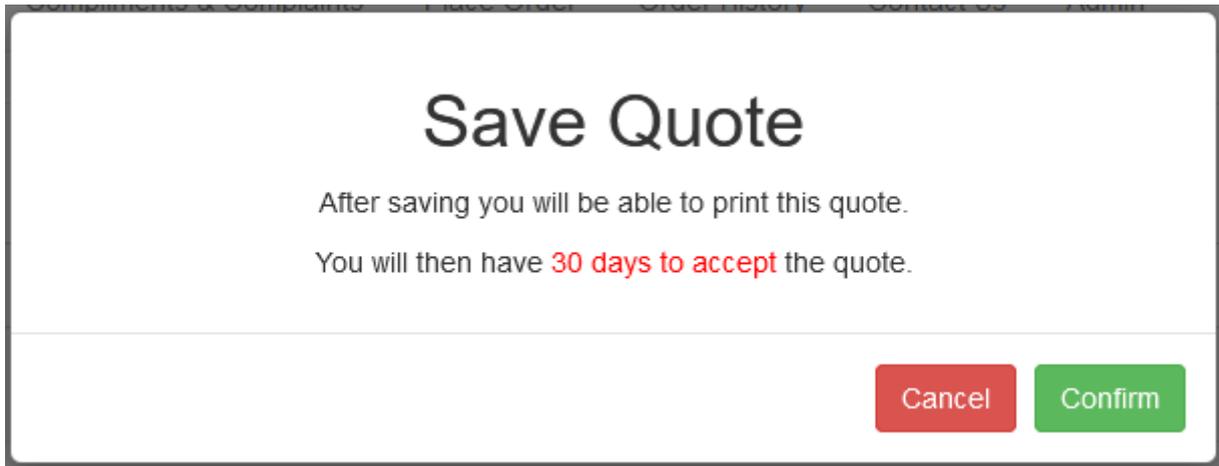
Service delivery will be carried out in accordance with your booked days for service, during your operating hours and as per our route schedule.

If you have a cash account with Compass, you will need to make payment before service delivery will be carried out. Remember to note your account number as the reference in order for your payment to be allocated promptly. Once payment has been made, forward your proof of payment to accounts@compass.za.net. Our customer service team will release your order as soon as payment reflects in our account.

For option 2 (saving a quote) click on the "Save Quote" button as seen below.

Confirm Delivery Site	Change Delivery Address												
Account Trade Name	[REDACTED]												
Account Number	[REDACTED]												
Site Name	[REDACTED]												
Street Address	[REDACTED]												
Payment Term	30 Days												
Confirm Internal Reference	Add References												
Ordered By	Please submit the name of the individual placing the order (for communication purposes).												
Purchase Order Number	A purchase order number or any alternative reference is required when placing an order.												
Notification Email (Optional)	Please submit an email address to receive notifications if required.												
Confirm Items													
<table><thead><tr><th>Description</th><th>Quantity</th><th>Price <small>incl VAT</small></th><th>Total <small>incl VAT</small></th></tr></thead><tbody><tr><td>142L Box Set Die Cut Lid 50x50x63cm (+142l/50m bag & cable tie)</td><td>3</td><td>R [REDACTED]</td><td>R [REDACTED]</td></tr><tr><td>25Lt Anatomical Container</td><td>1</td><td>R [REDACTED]</td><td>R [REDACTED]</td></tr></tbody></table>	Description	Quantity	Price <small>incl VAT</small>	Total <small>incl VAT</small>	142L Box Set Die Cut Lid 50x50x63cm (+142l/50m bag & cable tie)	3	R [REDACTED]	R [REDACTED]	25Lt Anatomical Container	1	R [REDACTED]	R [REDACTED]	
Description	Quantity	Price <small>incl VAT</small>	Total <small>incl VAT</small>										
142L Box Set Die Cut Lid 50x50x63cm (+142l/50m bag & cable tie)	3	R [REDACTED]	R [REDACTED]										
25Lt Anatomical Container	1	R [REDACTED]	R [REDACTED]										
Payment is due 30 Days from invoice date.													
	Total R [REDACTED] <small>incl VAT</small> R [REDACTED] <small>incl VAT</small>												
	Modify Cart												
Your order will be submitted and processed. Delivery will take place as per your booked days, operating hours and in accordance with our route schedule. Once you have confirmed your order you will be advised that your order has been successfully placed, inclusive of a reference number. Please take note of this reference number and provide to our customer service team in the event you have any queries in regards to your order placed.													
	Save Quote Place Order												

You will be presented with the save quote dialogue as seen below.



Click on confirm to save the quote which will yield the page displayed below.

Your quote was **saved successfully**

Quote Reference Number: **2048**

Click on the quote number above to view more details

To accept this quote **navigate to the "Order History" page**, use the filtering options to find the quote then accept the quote from the details page.

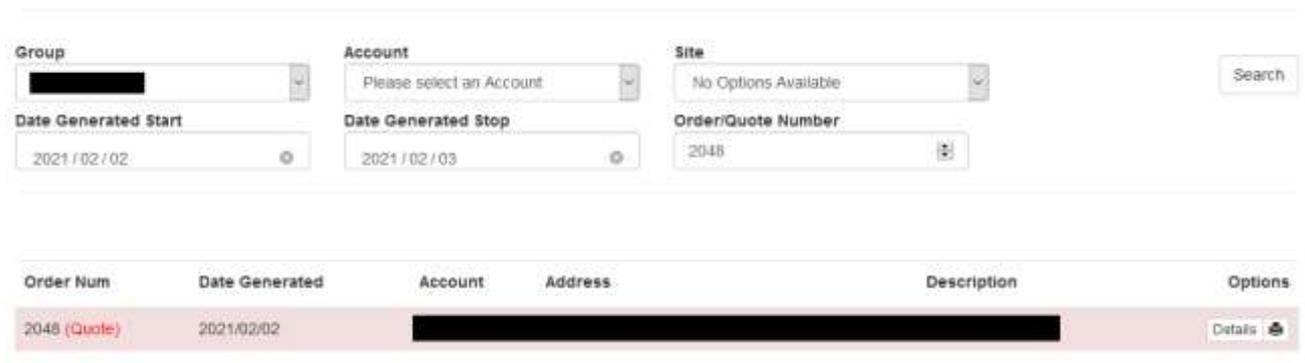
Additionally you can find the quote listed on the "Order History" page by submitting the quote number or using the available filtering options.

 Download Quote

From this page you can download a copy of the quote, another way to download a copy of the quote is to use the "Order History" page.

From the order history page, you can find order and quotes using the available filters.

To accept a quote simply find the desired quote on the "Order History" page then Click on the details link of the desired quote as seen below.



The image shows a filter section with the following fields:

- Group: [Redacted]
- Account: Please select an Account
- Site: No Options Available
- Date Generated Start: 2021/02/02
- Date Generated Stop: 2021/02/03
- Order/Quote Number: 2048

A Search button is located to the right of the Site field.

Order Num	Date Generated	Account	Address	Description	Options
2048 (Quote)	2021/02/02	[Redacted]	[Redacted]	[Redacted]	Details 

Clicking on the “Details” link will display the order/quote details page as seen below.

Quote **Details** Accept Quote Print Quote

Order Number	2047
Account Trade Name	[REDACTED]
Account Number	[REDACTED]
Site Name	[REDACTED]
Street Address	[REDACTED]
Payment Term	30 Days
Purchase Order Number	Not Specified
Referenced Name	test
Notification Email	

Quote **Contents**

Description	Quantity	Price <small>incl VAT</small>	Total <small>incl VAT</small>
10Lt Anatomical Container	1	R [REDACTED]	R [REDACTED]

Total
R [REDACTED] incl VAT
R [REDACTED] incl VAT

Accept Quote

Clicking on the “Accept Quote” button will display the confirmation dialogue, provide a reference number if one was not previous provided and then click on the “Accept” button as seen below.

Accept Quote ×

Purchase Order Number

Cancel Accept

Accepting a quote correctly will convert the quote into an order, the page below serves to confirm that the quote has been converted successfully.

Your order was placed successfully

Order Reference Number: **2048**

Thank you for placing your order with Compass.

Service delivery will be carried out in accordance with your booked days for service, during your operating hours and as per our route schedule.

If you have a cash account with Compass, you will need to make payment before service delivery will be carried out. Remember to note your account number as the reference in order for your payment to be allocated promptly. Once payment has been made, forward your proof of payment to accounts@compass.za.net. Our customer service team will release your order as soon as payment reflects in our account.

To view updates and track the progress of your order click on the link provided or alternatively use the “Order History” tab on the Navbar then use the available filters to find your order.

See the “Order History” page below.

Order History

Use the available filters to find the order(s) you are looking for.

The screenshot shows the COMPASS web application interface. At the top is a navigation bar with the COMPASS logo and menu items: Home, Place Order, Order History (active), DMS, Compliments & Complaints, and Contact Us. On the right of the navigation bar, there is a shopping cart icon with (0), a user profile 'User: demo1', and a 'Log off' link. Below the navigation bar, there is a heading 'Manage your orders from this page.' and a note: 'Note specifying an order number will override existing filters.'

The filter section contains the following fields:

- Group:** A dropdown menu with a redacted value.
- Account:** A dropdown menu with the text 'Please select an Account'.
- Site:** A dropdown menu with the text 'No Options Available'.
- Date Generated Start:** A date picker showing '2020/08/04'.
- Date Generated Stop:** A date picker showing '2020/08/05'.
- Order Number:** A text input field.

A 'Search' button is located to the right of the filter fields.

Below the filters is a table with the following columns: Order Num, Date Generated, Account, Address, Description, and Options. One order is listed with Order Num 45, Date Generated 2020/08/04, and redacted values for Account, Address, and Description. A 'Details' link with a magnifying glass icon is next to the order.

At the bottom left, it says 'Page 1 of 1' and there is a blue square button with the number '1'.

Click on the “Details” button to access a detailed view and track the history of a specific order, as seen below.

The screenshot displays the 'View Order Details' page. At the top, there is a navigation bar with the COMPASS logo and links for Home, Place Order, Order History, DMS, Compliments & Complaints, and Contact Us. A shopping cart icon shows 1 item, and the user is logged in as 'demo1'.

View Order Details

[Print Order](#)

Order Details

Order Number	45
Account Trade Name	[REDACTED]
Account Number	[REDACTED]
Site Name	[REDACTED]
Street Address	[REDACTED]
Payment Term	30 Days
Purchase Order Number	ABC123456
Referenced Name	John Doe
Notification Email	testen@fleet.com

Order Contents

Description	Quantity	Price	Total
142L Box Set Die Cut Lid 50x50x63cm (+142x50m bag & cable tie)	3	R [REDACTED] excl VAT	R [REDACTED] excl VAT
25L Anatomical Container	1	R [REDACTED] excl VAT	R [REDACTED] excl VAT
			Total
			R [REDACTED] incl VAT
			R [REDACTED] excl VAT

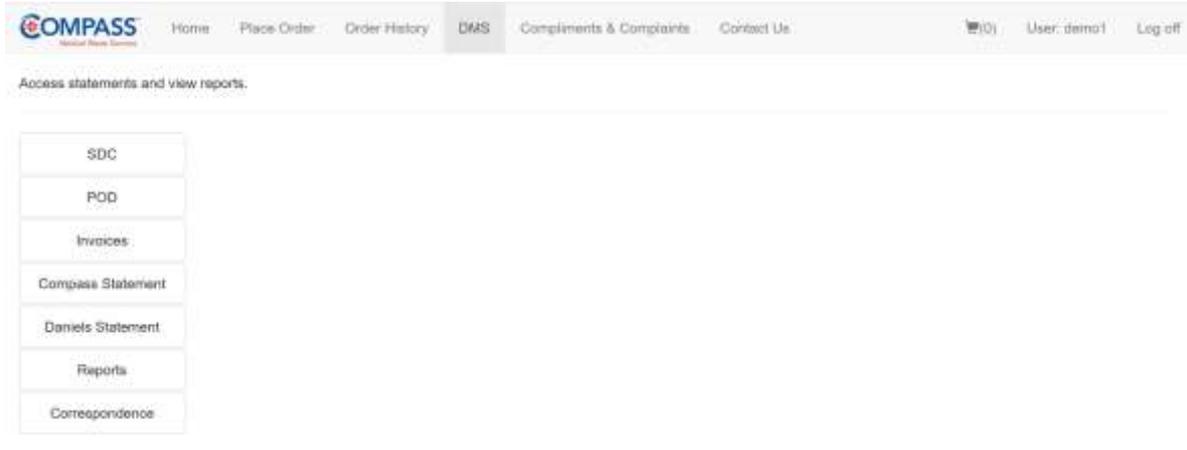
Order Tracking

[No tracking information is currently available](#)

You can also download a printable version of the order using the “Printer” button on the “Order History” page or alternatively click on the “Print Order” button located on the “Order Details” page.

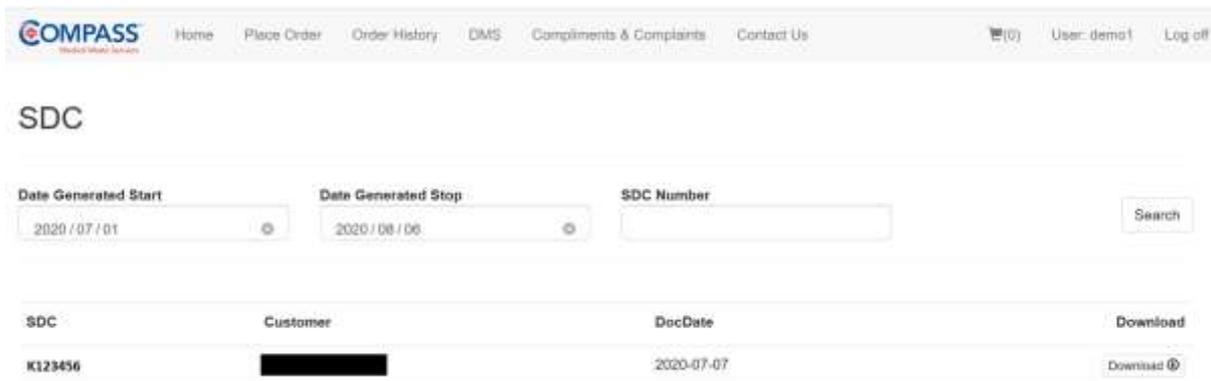
5. DMS & Reports

Use the DMS tab to access invoices, proof of deliveries, statement, various reports and correspondence.



Safe Disposal Certificates (SDC)

Safe disposal certificates can be searched for using the filters shown below. To reach the SDC search page click on the “SDC” link found on the main DMS page.



Proof of Delivery (POD)

Proof of delivery documents can be found using the “POD” button.

Note the “Company” column this indicates whether the document pertains to a “Compass” or “Daniels” order.

POD

Date Generated Start: 2020/07/01 Date Generated Stop: 2020/08/06 POD Number: Search

POD	Company	Customer	DocDate	Download
123456	Compass	[REDACTED]	2020-07-01	Download

Invoices

Use the “Invoices” link to reach the Invoice search page, as with POD’s the “Company” column distinguishes between the invoice pertaining to either “Compass” or “Daniels” transactions.

Invoices

Start Date: 2020/07/01 End Date: 2020/08/07 Document Number: Search

Document Number	Company	Customer	Document Date	Document Total	Download
12345	Compass	[REDACTED]	2020-07-08	51.00	Download
67890	Daniels	[REDACTED]	2020-07-08	0.00	Download

Statements

Clicking on the “Compass Statement” or “Daniels Statement” will yield downloadable statements for the respective companies.

Note clicking on an Invoice number on a given statement will navigate to the selected invoice, provided you are logged into the application and have the required access.

Reports

A list of available reports can be found by clicking the “Reports” link.

Available Reports

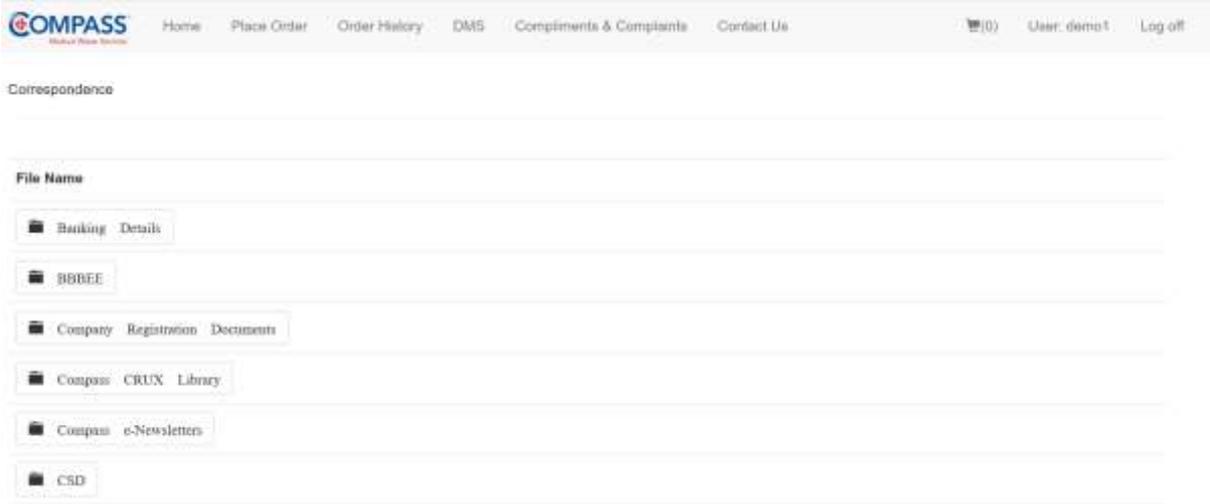
1. Deliveries vs Collections
2. Daily Tonnage Report
3. Average Product Quantities and Weights
4. Monthly Disposal Summary
5. All Waste Collected(2013-2018)

Correspondence

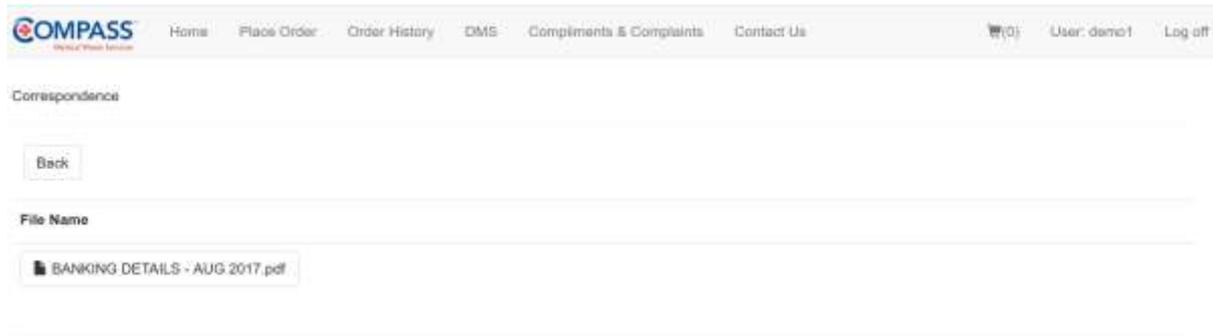
Access the latest news, views, announcements, important service delivery information etc. Print this off and share with the rest of your team or use in your training sessions.

Our permits, Waste Management Licences, B-BBEE certificate, tax clearance certificate and other pertinent documents can be found here.

To traverse into a directory simply click on the desired folder/button as seen below:



To exit a directory, use the “Back” button as seen below:



6. Compliments & Complaints

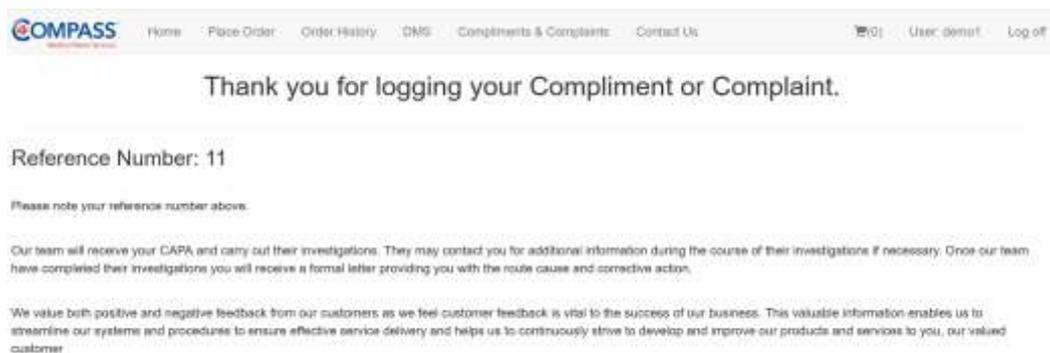
In order to file a compliment or complaint click on the “Compliments & Complaints” link found on the navbar.

Complete the form as displayed below then submit you compliment or complaint.

You can also attach multiple files to your submission, which can be achieved by holding down the control key when selecting files to upload.

A screenshot of the COMPASS web application interface showing the 'Compliments & Complaints' form. The navigation bar is the same as in the previous screenshot, but the 'Compliments & Complaints' link is highlighted. Below the navigation bar, there is a paragraph of text: 'We value both positive and negative feedback from our customers as we feel customer feedback is vital to the success of our business. This valuable information enables us to streamline our systems and procedures to ensure effective service delivery and helps us to continuously strive to develop and improve our products and services to you, our valued customer. Please complete the fields with the relevant information and attach all necessary/ pertinent documents. You will receive a reference number following submission of your feedback and our team will revert formerly with the root cause and corrective action/s implemented.' Below this text is the form. The form has the following fields: 'Feedback Type' (dropdown menu), 'Province' (dropdown menu), 'Group' (dropdown menu), 'Account number' (dropdown menu), 'Site name' (dropdown menu), 'Title' (dropdown menu), 'First Name' (text input), 'Surname' (text input), 'Contact number' (text input with a placeholder 'Please ensure to include the dialing code'), 'Email Address' (text input), 'Incident Date' (text input with a placeholder 'yyyy / mm / dd'), 'Description' (text area with a placeholder 'Please ensure to provide as much information and detail in this field to enable us to investigate this matter thoroughly and promptly.'), and 'Upload Attachment' (with a 'Browse...' button and 'No files selected.' text). At the bottom of the form is a blue 'Submit' button.

After submitting your compliment or complaint you will be directed to the page below:



Please note the reference number.

You now have quick, easy and secure access to your account where you can:

- Download your invoices, PODs, Safe Disposal Certificates and statements.
- Access various reports to assist you in managing your healthcare risk waste.
- Conveniently place your orders for healthcare risk waste products and sundry items.
- Obtain information to assist in training healthcare workers on the correct segregation and containment of healthcare risk waste.
- Access important documentation for internal and external audits.
- Log your compliment/ complaint in respect of our products and services.