

# 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.

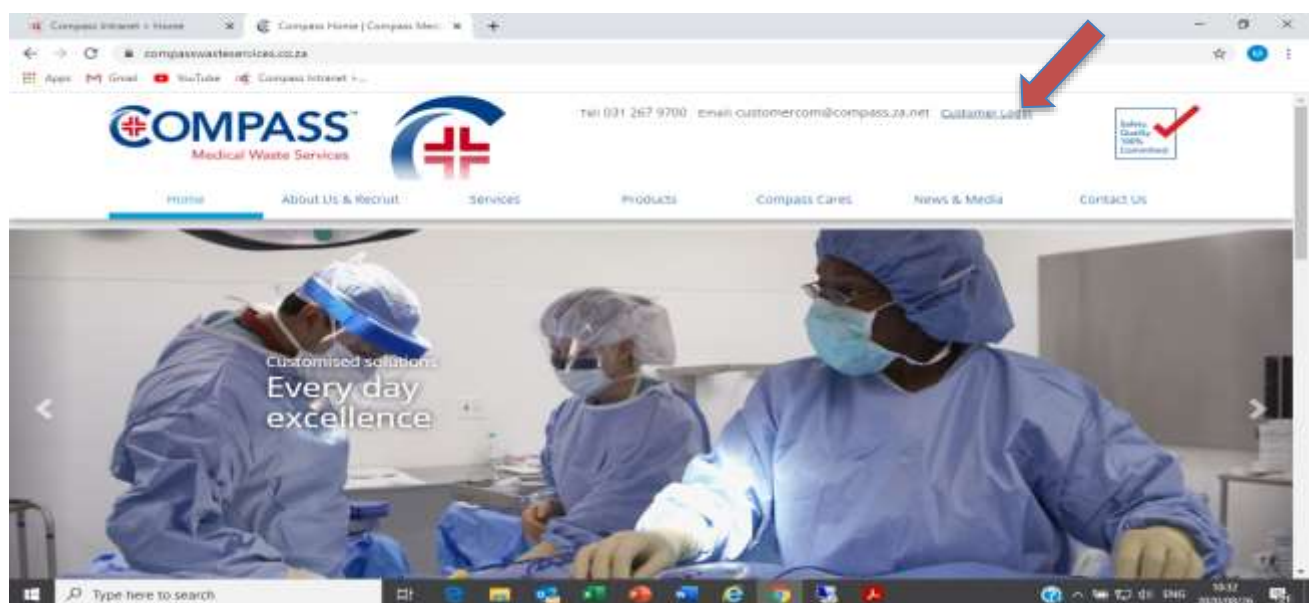
JavaScript needs to be enabled and the Pop-up blocker needs to be deactivated.

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](http://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](mailto:sales@compass.za.net) or from your sales executive.

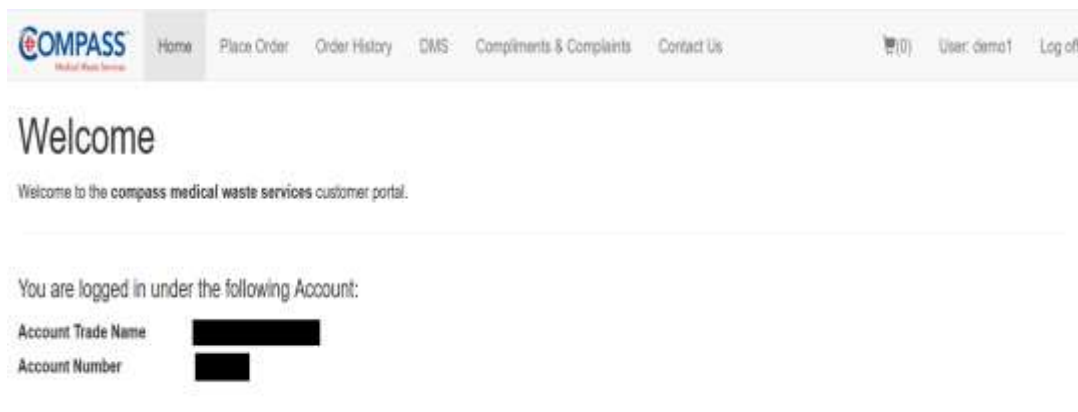
## Step three

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.

COMPASS

Medical Waste Services

Home

Place Order

Order History

DMS

Compliments & Complaints

Contact Us

0

User: demo1

Log off

Settings

Password:

[ Change your password ]

Email:

[ Change your Email Address ]

Email Verification:

[ [REDACTED] (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.

Add products to your cart from this page.

Category

All

Description

25Lt

Search

Order By

Default

Description	Unit	Price	Options
25Lt Anatomical Container	Each	R [REDACTED] excl VAT	<div>Add to Cart</div>
25Lt Plastic pedal bin - red	Each	R [REDACTED] excl VAT	<div>Add to Cart</div>
25Lt Sharps Container	Each	R [REDACTED] excl VAT	<div>Add to Cart</div>
25Lt Trochar Container	Each	R [REDACTED] excl VAT	<div>Add to Cart</div>

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.

Order History

DMS

Compliments & Complaints

Contact Us

Quantity Selection

X

Quantity:

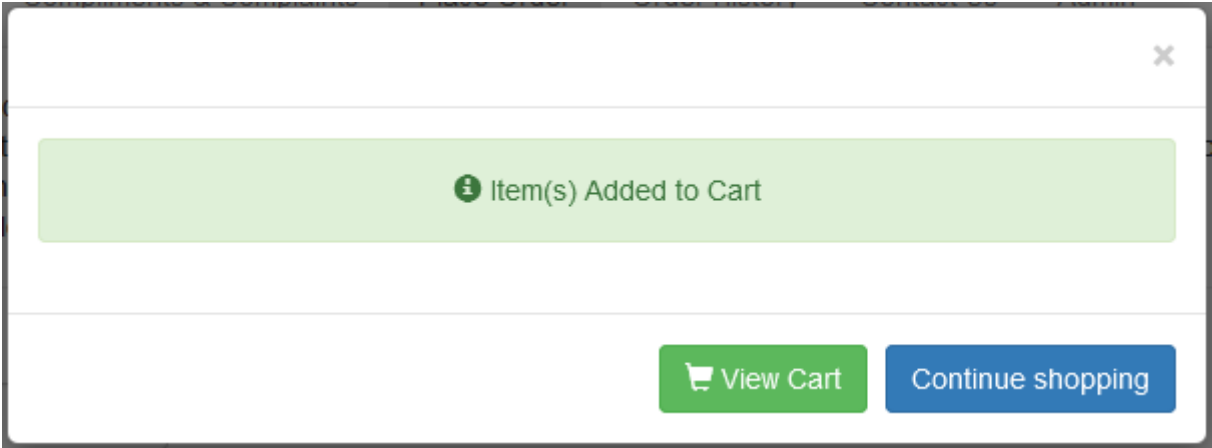
1

-

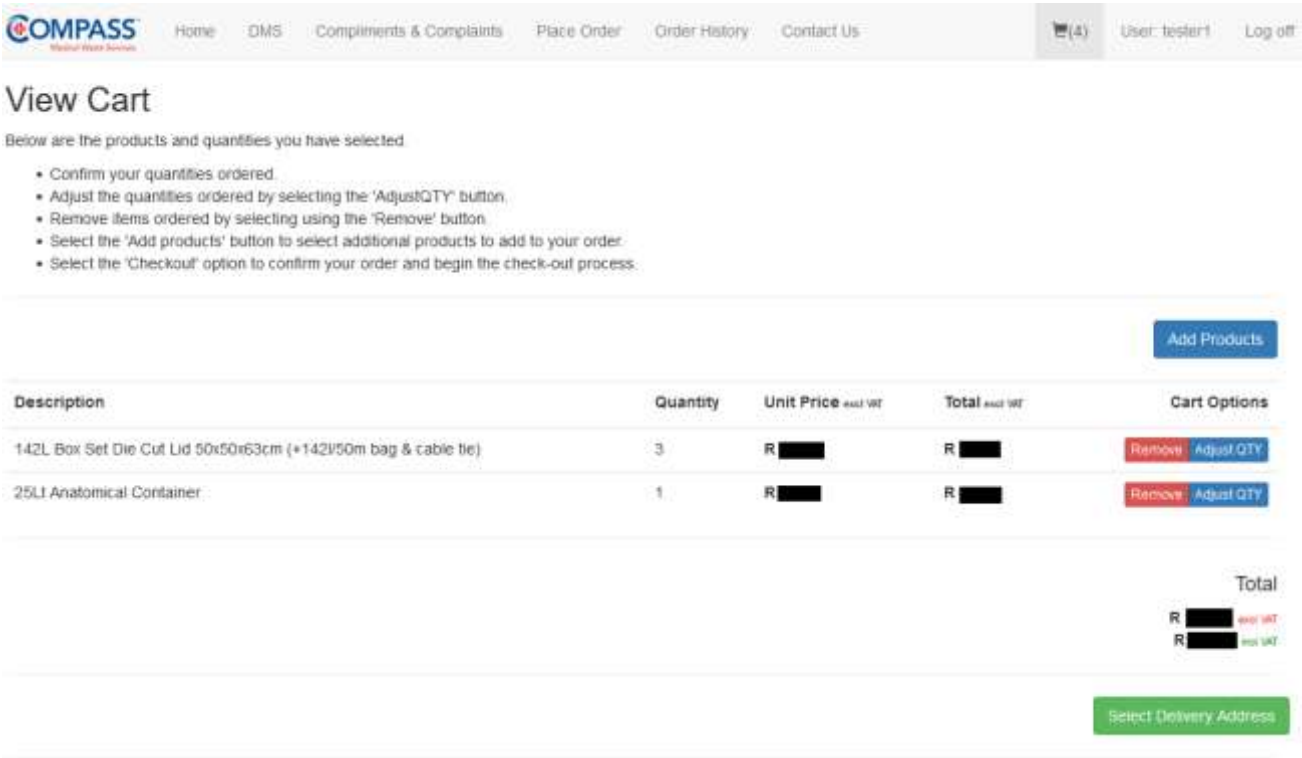
+

Confirm

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 <input type="text"/>			<input type="button" value="Search"/>
Trade Name	Site Name	Street Address	Select
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Select"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<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		<input type="button" value="Change Delivery Address"/>	
Account Trade Name	<input type="text"/>		
Account Number	<input type="text"/>		
Site Name	<input type="text"/>		
Street Address	<input type="text"/>		
Payment Term	30 Days		
Confirm Internal Reference		<input type="button" value="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			
Description	Quantity	Price <small>incl VAT</small>	Total <small>incl VAT</small>
142L Box Set Die Cut Lid 50x50x83cm (+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 <b>30 Days</b> from invoice date.			
			Total R <input type="text"/> <small>incl VAT</small> R <input type="text"/> <small>incl VAT</small>
			<input type="button" value="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.			
			<input type="button" value="Save Quote"/> <input type="button" value="Place Order"/>

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.

A screenshot of a web application interface. At the top is a navigation bar with the COMPASS logo and links for Home, Place Order, Order History, DMS, Compliments & Complaints, and Contact Us. On the right of the navigation bar are icons for a shopping cart, a user profile labeled 'User: demo1', and a 'Log off' link. Below the navigation bar is a section titled 'Submit References'. It contains three input fields: 'Your Name', 'Purchase Order Number / Reference Number', and 'Notification Email (Optional)'. A blue 'Save' button is located below the input fields.

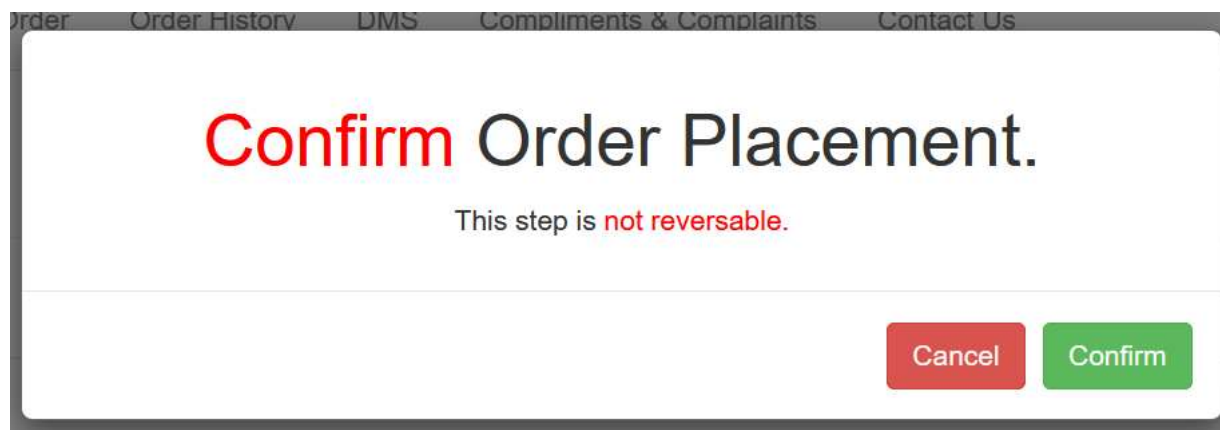
If you are satisfied with the content of your order, you now have two options.

**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.

A screenshot of a confirmation dialog box. The dialog has a white background with a grey border. At the top, the text 'Confirm Order Placement.' is displayed, with 'Confirm' in red and 'Order Placement.' in black. Below this, the text 'This step is not reversible.' is shown, with 'not reversible.' in red. At the bottom right of the dialog are two buttons: a red 'Cancel' button and a green 'Confirm' 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](mailto: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

Account Number

Site Name

Street Address

Payment Term

30 Days

Confirm Internal Reference

Add References

Ordered By

Purchase Order Number

Notification Email (Optional)

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

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

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	R
25Lt Anatomical Container	1	R	R

Payment is due 30 Days from invoice date.

Total

R incl VAT

R incl VAT

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

Compass Medical Waste Services (Pty) Ltd  
File name: DMS User Manual

Page 8



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

Save Quote

After saving you will be able to print this quote.  
You will then have 30 days to accept the quote.

Cancel

Confirm

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.

Group

Account

Please select an Account

Site

No Options Available

Search

Date Generated Start

2021/02/02

Date Generated Stop

2021/02/03

Order/Quote Number

2048

Order Num	Date Generated	Account	Address	Description	Options
2048 (Quote)	2021/02/02				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	
Account Number	
Site Name	
Street Address	
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	R

Total

R incl VAT

R 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](mailto: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.

COMPASS

Medical Waste Services

Home

Place Order

Order History

DMS

Compliments & Complaints

Contact Us

(0)

User: demo1

Log off

Manage your orders from this page.

Note specifying an order number will override existing filters.

Group

Account

Please select an Account

Site

No Options Available

Search

Date Generated Start

2020/08/04

Date Generated Stop

2020/08/05


Order Number

Order Num	Date Generated	Account	Address	Description	Options
45	2020/08/04				<div>Details</div>


Page 1 of 1

1

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


[Home](#)
[Place Order](#)
[Order History](#)
[DMS](#)
[Compliments & Complaints](#)
[Contact Us](#)
🛒 (1)
User: demo1
Log off

## View Order Details

 Print Order


### Order Details

Order Number	45
Account Trade Name	
Account Number	
Site Name	
Street Address	
Payment Term	30 Days
Purchase Order Number	ABC123456
Referenced Name	John Doe
Notification Email	test@tst.com

### Order Contents

Description	Quantity	Price	Total
142L Box Set Die Cut Lid 50x50x63cm (+142v50m bag & cable tie)	3	R 0.00 excl VAT	R 0.00 excl VAT
25L1 Anatomical Container	1	R 0.00 excl VAT	R 0.00 excl VAT
			<b>Total</b>
			R 0.00 excl VAT
			R 0.00 excl VAT

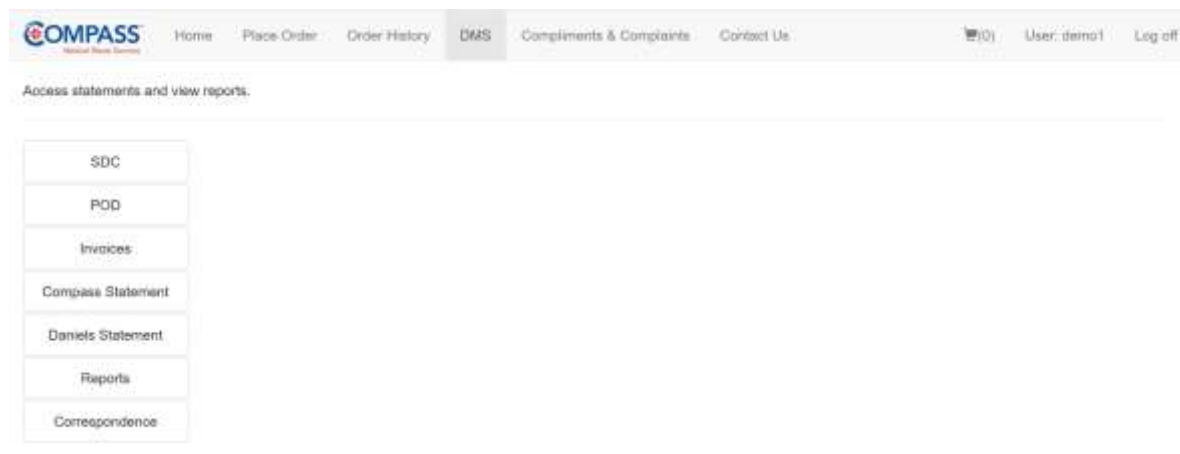
### Order Tracking

 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.

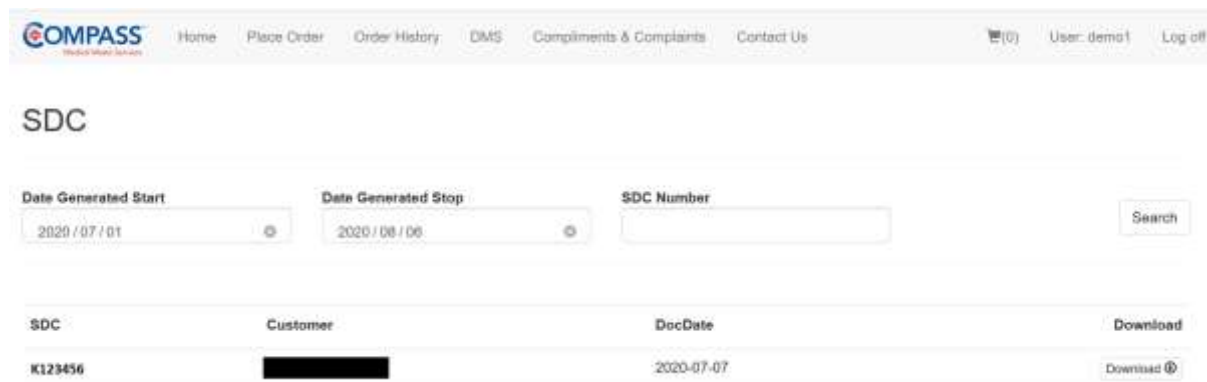
## 5. DMS & Reports

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		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		2020-07-08	51.00	Download
67890	Daniels		2020-07-06	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

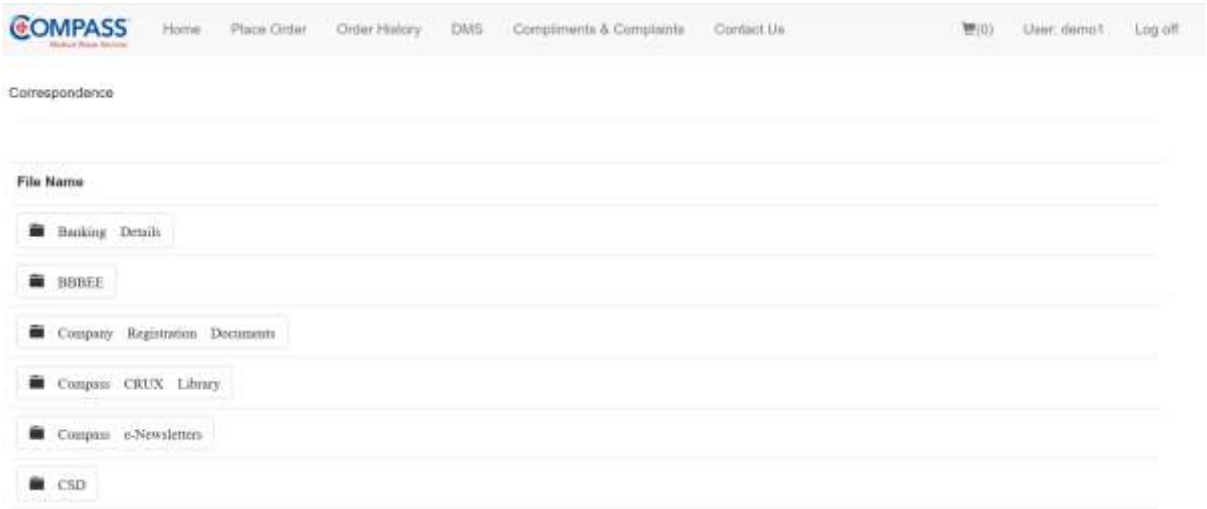
1. Deliveries vs Collections
2. Daily Tonnage Report
3. Average Product Quantities and Weights
4. Monthly Disposal Summary
5. All Waste Collected(2013-2018)

## 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:



COMPASS  
Medical Waste Services

Home Place Order Order History DMS Compliments & Complaints Contact Us

Shopping Cart (0) User: demo1 Log off

Correspondence

Back

File Name

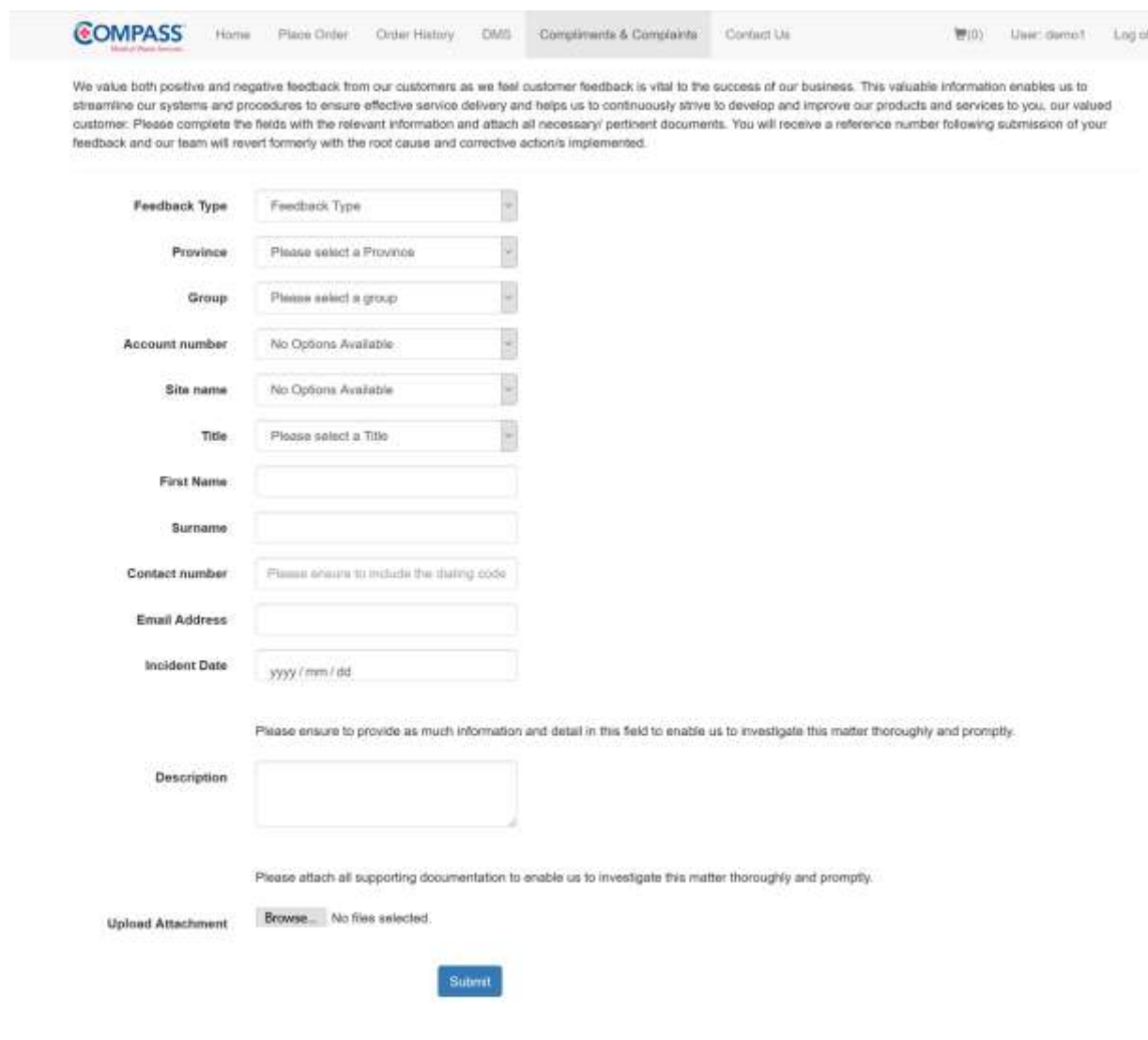
BANKING DETAILS - AUG 2017.pdf

## 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 your 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.



COMPASS  
Medical Waste Services

Home Place Order Order History DMS Compliments & Complaints Contact Us

Shopping Cart (0) User: demo1 Log off

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.

Feedback Type: Feedback Type

Province: Please select a Province

Group: Please select a group

Account number: No Options Available

Site name: No Options Available

Title: Please select a Title

First Name:

Surname:

Contact number: Please ensure to include the dialing code

Email Address:

Incident Date: yyyy / mm / dd

Please ensure to provide as much information and detail in this field to enable us to investigate this matter thoroughly and promptly.

Description:

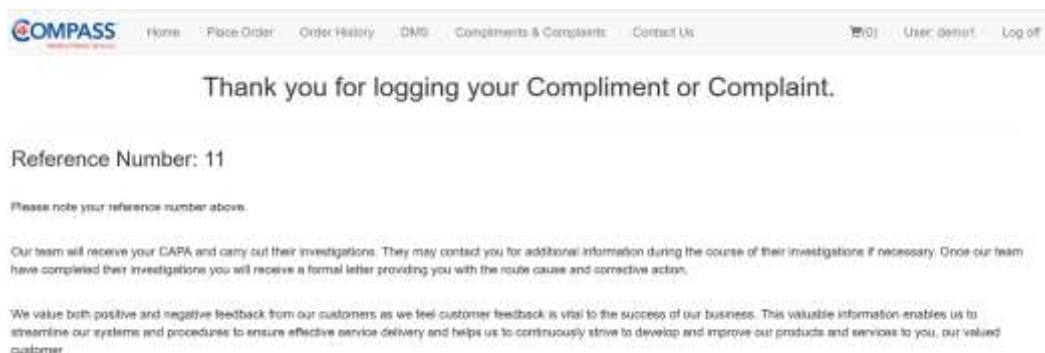
Please attach all supporting documentation to enable us to investigate this matter thoroughly and promptly.

Upload Attachment: Browse... No files selected.

Submit



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.