

# User Help Guide - SANBS Invoice Portal

This document serves as a step by step guide for Invoice Portal users. It covers all the functionality for the SANBS Invoice Portal.

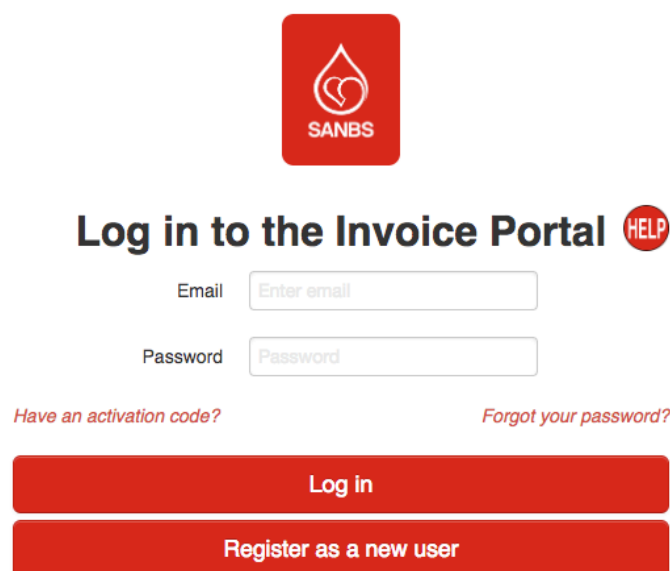
## 1. Login

The login screen can be accessed with 2 different routes:

1. Via the SANBS website
2. Via the following link: <https://customerinvoiceportal.sanbs.org.za>

The login screen enables you to perform the following actions:

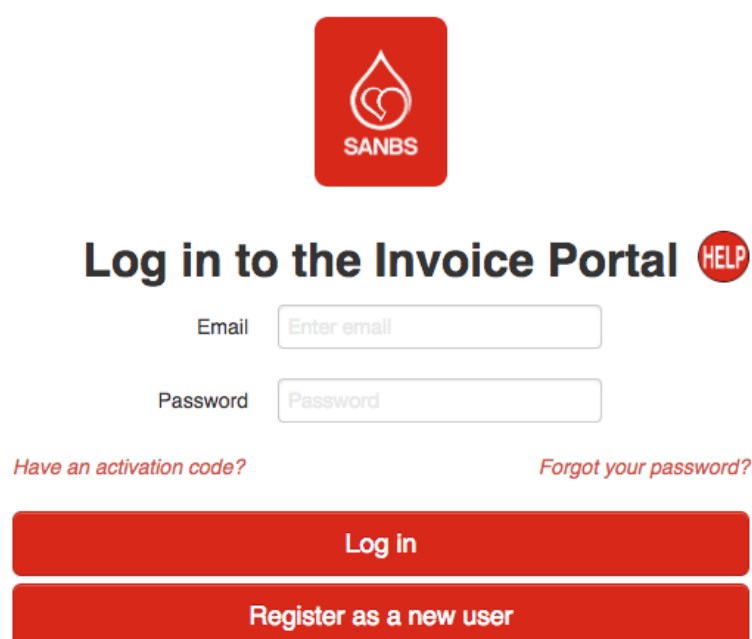
1. [Log in to the Invoice Portal](#)
2. [Use an activation code to verify your account](#)
3. [Reset your forgotten password](#) (Forgot Password)
4. [Reset your temporary password](#)
5. [Register as a user](#)
6. [Access the help documentation](#)




### 1.1. Log in to the Invoice Portal

If you are a registered Invoice Portal user (and have been approved by the system administrator), the following steps will allow you to log in to the system:

1. Navigate to the login screen



2. Enter your email in the 'Email' field
3. Enter your password in the 'Password' field
4. Select the 'Log in' button
5. If the credentials entered were correct you will be navigated to the Invoice Portal Home screen.



ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

---

**Welcome to**

SANBS Invoice Portal

**Vision**

To be a cornerstone of healthcare services in South Africa, through the gift of life.

**Mission**

The mission of the South African National Blood Service is to provide all patients with sufficient, safe, quality blood products and medical services related to blood transfusion in an equitable, cost-effective manner.

**About Us**

- SANBS is a non-profit organisation; therefore, ownership of its assets does not vest in its members. In the event that SANBS should stop operating, its assets would have to be transferred to an organisation with similar goals and objectives.
- SANBS provides an essential service within South Africa and is rated amongst the best in the world in the provision of blood and blood products, as well as in relation to the research and training provided.
- SANBS operates across all of South Africa, with the exclusion of the Western Cape.
- SANBS is further regarded as a major role player in the provision of support to countries in the SADC region.

6. If the credentials entered were not correct an error message will be displayed telling you what the issue is.

Note: If you haven't been registered as a user yet you will not be able to log in to the system (Refer to '[Register as a user](#)')


## 1.2. Use an activation code to verify your account

The following steps will allow you to use the activation code, which is sent via email, to verify your account:

1. An email was sent to your email address by the SANBS Invoice Portal, this email contains an activation code.(Please note that this code is only valid for 24 hours)

Hi Name Surname,  
 You have registered as a user on the Invoice portal. Please use the following code to activate your account: 301559.  
 Thank you,  
 SANBS Invoice Portal

2. Copy the activation code in the email
3. Navigate to the Invoice Portal Login screen



**Log in to the Invoice Portal**

Email

Password

[Have an activation code?](#) [Forgot your password?](#)

4. Select the 'Have an activation code?' link
5. The 'Activate your account' screen will be displayed

**Activate your account**

Email

Code

6. Enter your email address in the 'Email' field
7. Enter the activation code in the 'Code' field
8. Select the 'OK' button
9. If the code was correct you will be navigated back to the login screen.
10. If the information entered is incorrect a error message will be displayed telling you what the issue is.

Note: You will not yet be able to log in to the system as the administrator has not yet accepted your user request. (Refer to '[Login in to the Invoice Portal](#)'). If the activation code is no longer valid you need contact the administrator to request a new verification code to be sent.

## 1.3. Reset your forgotten password (Forgot Password)

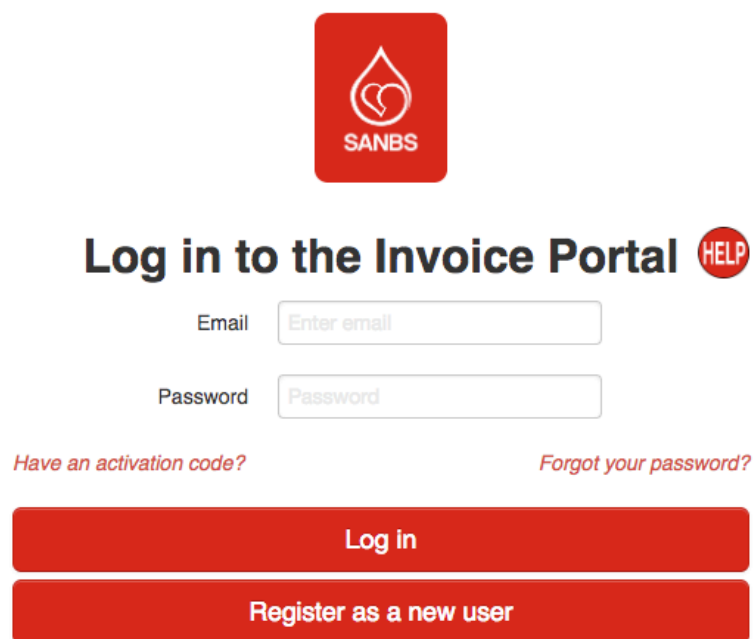
If you have forgotten your password, there are 2 ways that you can reset your password:

1. [Reset your password \(Self help\)](#)
2. [Reset your password \(Administrator help\)](#)

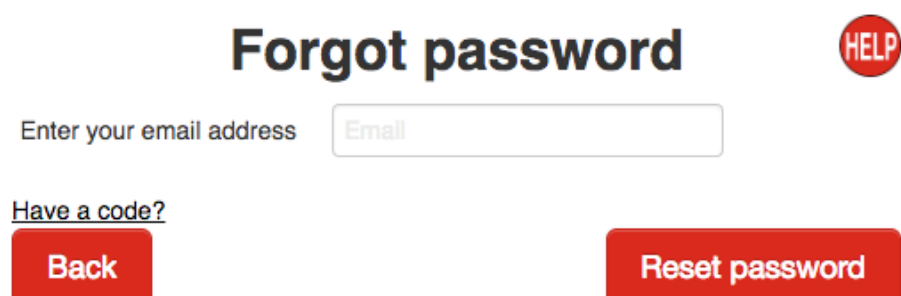
### 1.3.1. Reset your password (Self help)

The following steps will allow you to reset your password via the invoice portal:

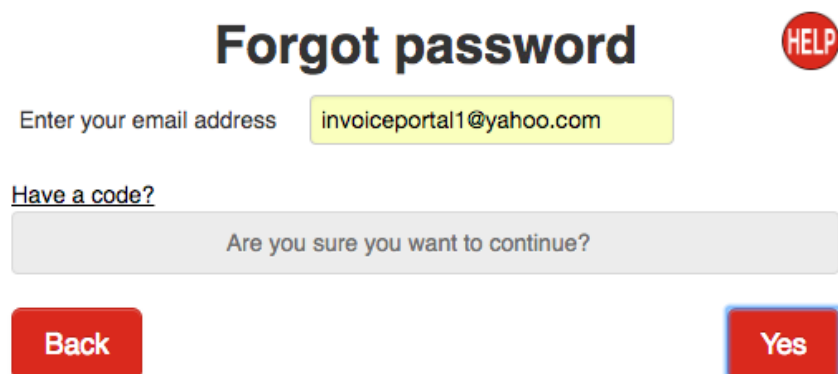
1. Navigate to the Invoice Portal login screen



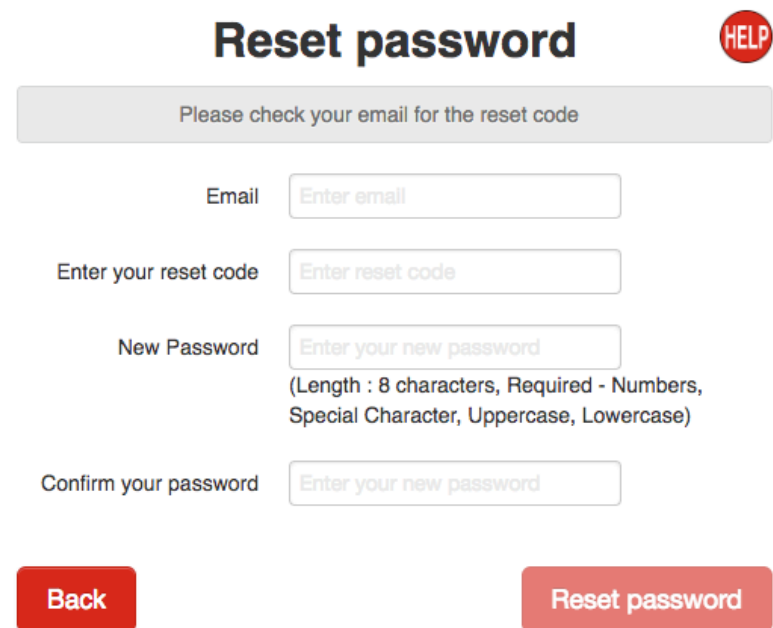
2. Select the 'Forgot your password?' link
3. The 'Forgot password' screen will be displayed



4. Enter your email address in the 'Enter your email address' field
5. Select the 'Reset password' button
6. A confirmation message is displayed asking the following "Are you sure you want to continue?"



7. Select the 'Yes' button
8. The 'Reset password' screen will be displayed



9. An email was sent to you with a reset code.

Dear Name Surname,  
According to our records, you requested to have your password reset. Please use this code to reset your password: 054922  
Thank you,  
SANBS Invoice Portal

10. Copy the reset code from the email
11. Enter your email in the 'Enter your email' field
12. Enter your reset code (as sent to you via email) in the 'Enter your reset code' field
13. Enter your new password in the 'Enter your new password' field
14. Enter your new password in the 'Confirm your password' field
15. Select the 'Reset password' button

16. If there are no errors you will be navigated back to the login screen and you will now be able to use your new password.
17. If there are errors the error message will be displayed at the top of the screen and tell you what the issue is.

### 1.3.2. Reset your password (Administrator help)

The following steps will allow you to reset your password with an administrators help:

1. Send an email or phone the system administrator and request that they reset your password
2. Once the administrator has reset your password an email will be sent to your email address containing the reset code

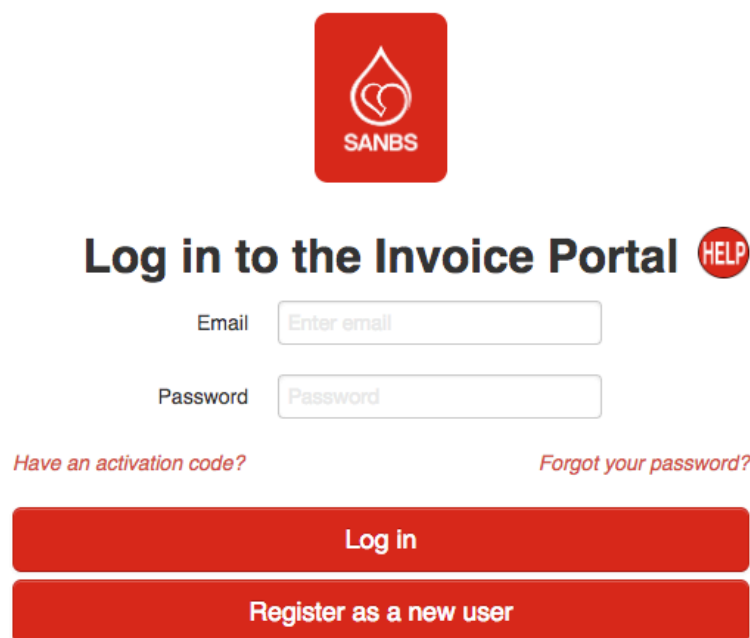
Dear Name Surname,

According to our records, you requested to have your password reset. Please use this code to reset your password: 775067

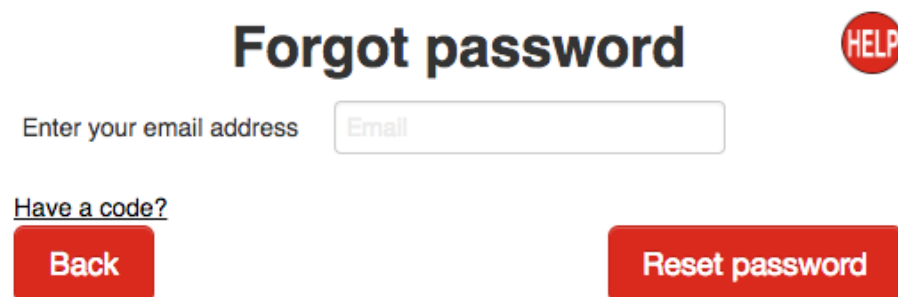
Thank you,

SANBS Invoice Portal

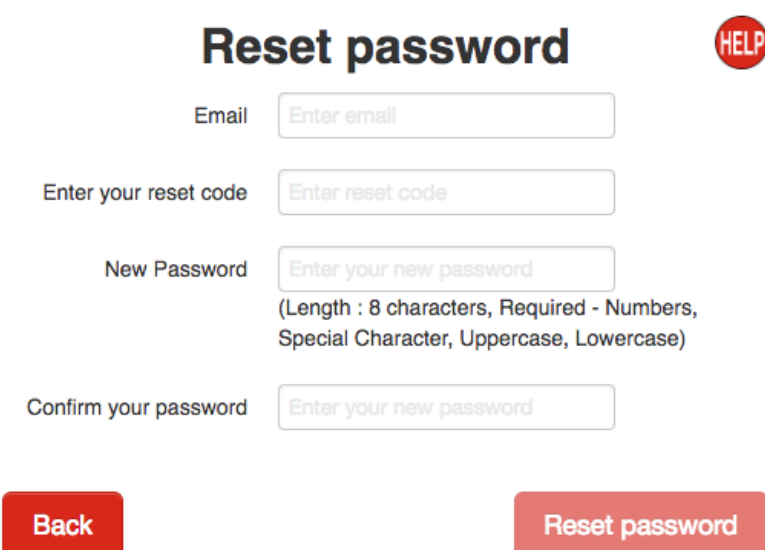
3. Navigate to the 'Login' screen (refer to '[Login](#)')



4. Select the 'Forgot your password' link
5. The 'Forgot password' screen is displayed



6. Select the 'Have a code' link
7. The 'Reset Password' screen is displayed



8. Copy the reset code from the email
9. Enter your email in the 'Enter your email' field
10. Enter your reset code (as sent to you via email) in the 'Enter your reset code' field
11. Enter your new password in the 'Enter your new password' field
12. Enter your new password in the 'Confirm your password' field
13. Select the 'Reset password' button
14. If there are no errors you will be navigated back to the login screen and you will now be able to use your new password.
15. If there are errors the error message will be displayed at the top of the screen and tell you what the issue is.

### 1.4. Reset your temporary password


If you have been added to the Invoice Portal by the system administrator, an email would have been sent to your account containing your temporary password.

The following steps will allow you to reset your temporary password to enable you to log in to the Invoice Portal.

1. The temporary password was sent to your email account
2. Open the 'Invoice Portal Temporary Password' email

Hi Name Surname,  
You have been registered as a user on the Invoice portal with username invoiceportal2@yahoo.com. Please use the following password to log on to your account: P!@ssword1.  
Thank you,  
SANBS Invoice Portal

3. Copy the temporary password from the email
4. Navigate to the Invoice Portal login screen



### Log in to the Invoice Portal HELP

Email

Password

[Have an activation code?](#) [Forgot your password?](#)

5. Enter the following on the login screen
  1. Email (The email address that the temporary password was sent to)
  2. Password (The temporary password that was sent to your email address)
6. Select the Log in button
7. The 'Reset password' screen will be displayed with the following message at the top of the screen: 'Password change required, as you are using a temporary password'

### Reset password HELP

Password change required, as you are using a temporary password.


Email

Temporary Password

New Password   
(Length : 8 characters, Required - Numbers, Special Character, Uppercase, Lowercase)

Confirm your password

8. Enter the following details
  1. Email (The email that the temporary password was sent to, this is the email address you will use to log in to the system)
  2. Temporary password (The temporary password that was emailed to you)
  3. New password (The new password you will be using to log in to the Invoice Portal)
  4. Confirm your password (The new password you will be using to log in to the Invoice Portal)
9. Select the 'Reset password' button
10. The login screen will be displayed



### Log in to the Invoice Portal HELP

Email

Password

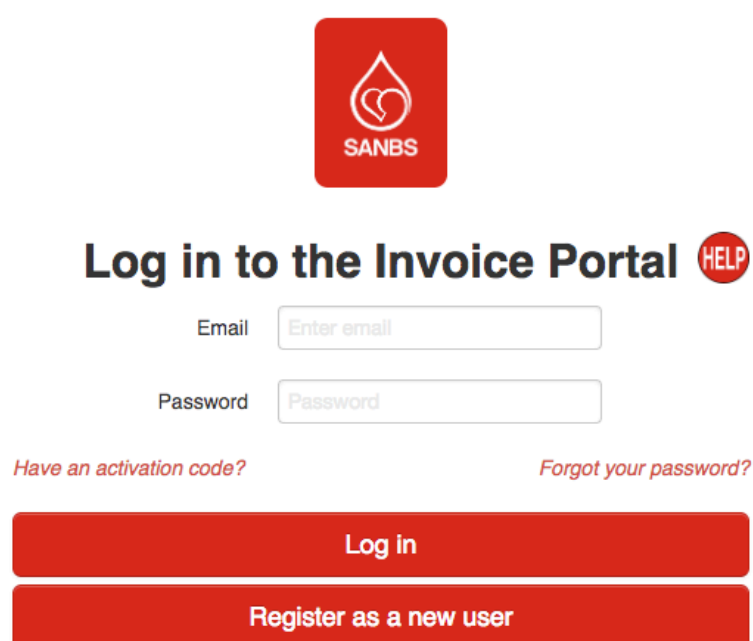
[Have an activation code?](#) [Forgot your password?](#)

11. You will now be able to log in to the Invoice Portal using your new password

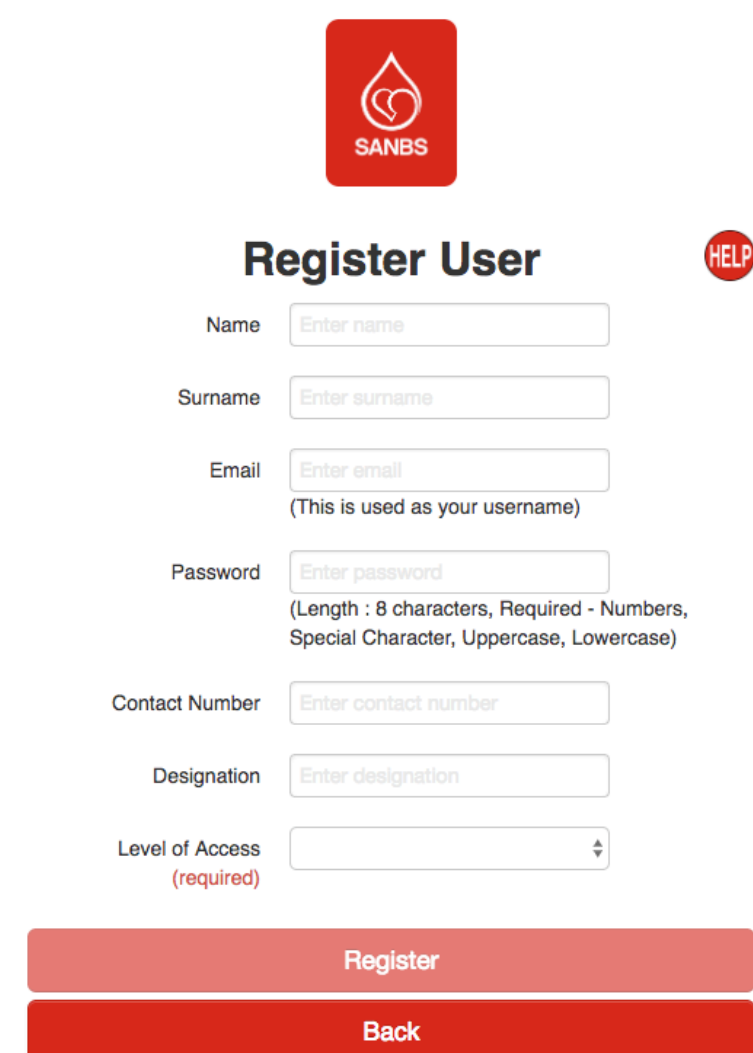
## 1.5. Register as a user

The following steps allow you to register as a user on the Invoice Portal. Note: A user request has to be accepted by an administrator before you will have access to the system.

1. Navigate to the Invoice Portal login screen



2. Select the 'Register as new user' button
3. The 'Register User' screen will be displayed



4. Enter the following:
  1. Enter your first name in the 'Name' field
  2. Enter your surname in the 'Surname' field
  3. Enter your email address in the 'Email' field
  4. Enter your password in the 'Password' field
  5. Enter your contact number in the 'Contact number' field (Note you have to add the country extension before the number)
  6. Enter your designation in the 'Designation field
5. Select the level of access (This refers to the level of access you will have in the system).
6. Depending on the level of access one of the following selections will be displayed
  1. Province - If you have selected your level of access as Provincial or Hospital
  2. Hospital - If you have selected your level of access as Hospital
7. If applicable select the specific province or hospital
8. The register button will be enabled once all the required information has been provided (If any of the information is not provided you will not be able to register as a user)
9. Select the 'Register' button
10. If there were no errors the following message will be displayed: 'Request submitted. You will receive a code shortly, please activate your account once you've received it'.



## Register User



Request Submitted. You will receive a code shortly, please activate your account once you've received it.

Name	<input type="text" value="Name"/>
Surname	<input type="text" value="Surname"/>
Email	<input type="text" value="invoiceportal1@yahoo.com"/> (This is used as your username)
Password	<input type="password" value="*****"/> (Length : 8 characters, Required - Numbers, Special Character, Uppercase, Lowercase)
Contact Number	<input type="text" value="+27843736354"/>
Designation	<input type="text" value="Finance"/>
Level of Access	<input type="text" value="Hospital"/>
Province	<input type="text" value="Eastern Cape"/>
Hospital	<input type="text" value="Aberdeen Province-Aided Hosp"/>

Register

Back

11. You will receive an email with an activation code to verify your account (refer to '[Use an activation code to verify your account](#)')

Hi Name Surname,

You have registered as a user on the Invoice portal. Please use the following code to activate your account: 301559.

Thank you,

SANBS Invoice Portal

## 2. Home screen

The home screen of the Invoice Portal is the first screen that is displayed after logging in to the Invoice Portal. On the home screen you will see the following

1. [The main menu](#) (This is the bar at the top of the screen)
2. [The home screen](#) (This is the section below the menu bar that shows any relevant marketing information that SANBS wants to display)

The screenshot shows the top navigation bar with the SANBS logo on the left and a search bar on the right. Below the search bar is a horizontal menu with links for 'OUTSTANDING INVOICES', 'PAID INVOICES', 'SHARED DOCS', and 'FAQ's'. A user profile dropdown menu is visible on the right side of the navigation bar, showing the user's 'Surname Name'. The main content area features a 'Welcome to' message, the SANBS logo, and a 'HELP' button. Below this is a 'Vision' section with the text 'To be a cornerstone of healthcare services in South Africa, through the gift of life.' followed by a 'Mission' section with the text 'The mission of the South African National Blood Service is to provide all patients with sufficient, safe, quality blood products and medical services related to blood transfusion in an equitable, cost-effective manner.' and an 'About Us' section with a bulleted list of information about the organization. A 'Get Started' button is located at the bottom left of the page.

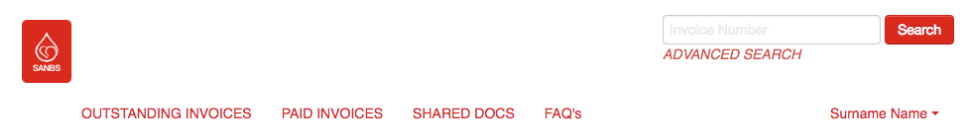
## 3. Main Menu

The Menu is the section at the top of the screen that lists all the options there are on the system. Depending on your user type your menu options will be different.

The following options are on the menu:

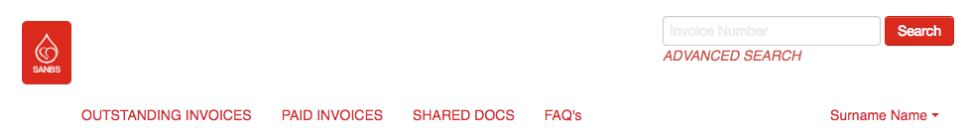
1. [SANBS Logo](#) (This navigates you back to the home screen)
2. [Outstanding Invoices](#) (This navigates you to the 'Outstanding Invoices' screen that lists all the outstanding invoices for the hospitals you have access to)
3. [Paid Invoices](#) (This navigates you to the 'Paid Invoices' screen that lists all the paid invoices for the hospitals you have access to)
4. [FAQ's](#) (This navigates you to the 'FAQ's' screen that lists all the frequently asked questions about the system)
5. [Shared Docs](#) (This navigates you to the 'Shared Documents' screen that lists all the uploaded documents that you have access to)
6. [User Options](#) (Your name and surname)
  1. [Log out](#) (This logs you out of the system and navigates to the login screen)
  2. [Change password](#) (This navigates to the 'Change Password' screen which allows you to change your password)
  3. [Profile](#) (This navigates to the 'Profile' screen which allows you to view and update your user information)
7. [Search](#) (This will navigate to the 'Search results' screen and list all the invoices that adhere to the search criteria)
8. [Advanced search](#) (This will navigate you to the 'Advanced Search' screen that allows you to enter multiple search criteria display a list of matching invoices)

To navigate to a specific screen select the appropriate menu option.



### 3.1. SANBS Logo

This logo will appear at the top left hand corner of every screen. If you select the logo you will be navigated you back to the home screen.

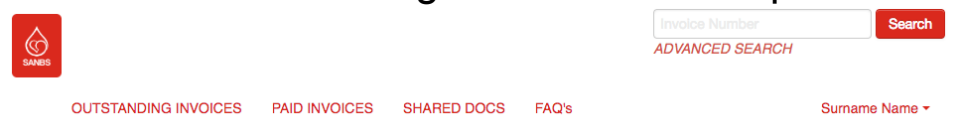


### 3.2. Outstanding Invoices

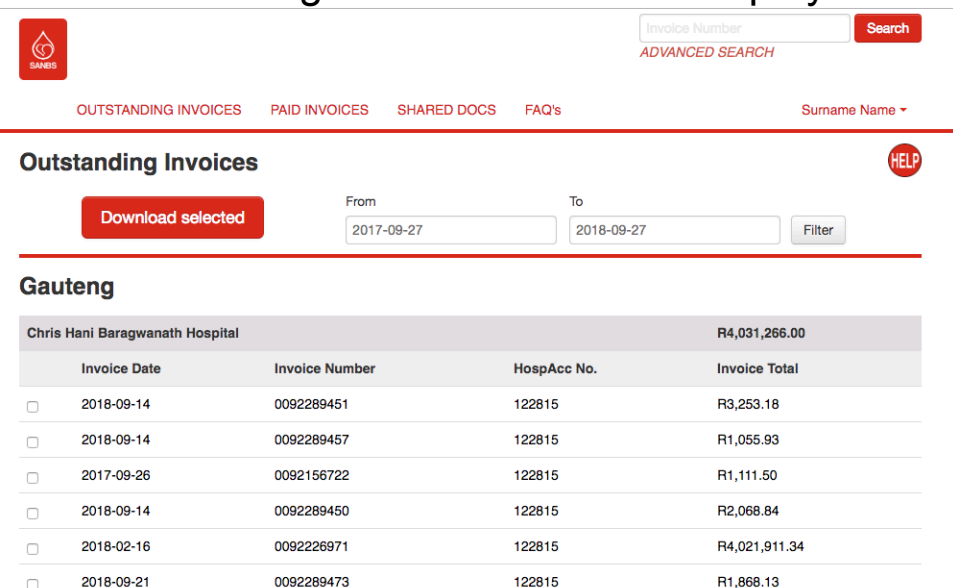
This screen allows you to view a list of all the outstanding invoices for the hospitals that you have access too. Note: If you don't have access to certain provinces or hospitals you will not be able to see their invoices. By selecting any one of the invoices it will display the invoice details screen for that invoice (Refer to '[View outstanding invoice details](#)').

How to navigate to this screen:

1. Select the 'Outstanding Invoices' menu option



2. The 'Outstanding Invoices' screen is displayed



The outstanding invoices screen also allows you to perform the following actions:

1. [Filter the outstanding invoices](#)
2. [View Outstanding Invoice Details](#)
3. [Download multiple outstanding invoices](#) (this downloads the pdf documents for multiple selected outstanding invoices)
4. [Print a list of outstanding invoices](#)

Note: The invoices are ordered by province and then by hospital. There is a total next to each of the hospital headings that represents the total outstanding amount for each hospital.



### 3.2.1. Filter the outstanding invoices

A filter function is included on the screen to enable you to select a date range ('from date' and 'too date'), this will allow you to limit the amount of invoices that are displayed.

The following steps will allow you to filter the outstanding invoices:

1. Navigate to the 'Outstanding Invoices' screen (refer to ['Outstanding Invoices'](#))

The screenshot shows the 'Outstanding Invoices' interface. At the top, there is a search bar for 'Invoice Number' and a 'Search' button. Below the search bar, there are navigation tabs: 'OUTSTANDING INVOICES', 'PAID INVOICES', 'SHARED DOCS', and 'FAQ's'. A 'Surname Name' dropdown is also visible. The main heading is 'Outstanding Invoices' with a 'HELP' icon. Below this, there is a 'Download selected' button and a date range filter: 'From' 2017-09-27 and 'To' 2018-09-27, with a 'Filter' button. The table below is titled 'Gauteng' and lists invoices for 'Chris Hani Baragwanath Hospital' with a total of R4,031,266.00. The table columns are 'Invoice Date', 'Invoice Number', 'HospAcc No.', and 'Invoice Total'.

Invoice Date	Invoice Number	HospAcc No.	Invoice Total
2018-09-14	0092289451	122815	R3,253.18
2018-09-14	0092289457	122815	R1,055.93
2017-09-26	0092156722	122815	R1,111.50
2018-09-14	0092289450	122815	R2,068.84
2018-02-16	0092228971	122815	R4,021,911.34
2018-09-21	0092289473	122815	R1,868.13

2. Select the 'From Date'
3. Select the 'To Date'
4. Select the 'Filter' button
5. The invoice list will now be filtered according to the dates that were selected

### 3.2.2. View Outstanding Invoice Details

This screen allows you to view the details and the PDF document of the selected outstanding invoice.

The following steps will allow you to view the details for the outstanding invoice:

1. Navigate to the 'Outstanding Invoices' screen (refer to ['Outstanding Invoices'](#))

The screenshot shows the 'Outstanding Invoices' interface, identical to the previous one. It displays a table of invoices for 'Chris Hani Baragwanath Hospital' in Gauteng. The table columns are 'Invoice Date', 'Invoice Number', 'HospAcc No.', and 'Invoice Total'.

Invoice Date	Invoice Number	HospAcc No.	Invoice Total
2018-09-14	0092289451	122815	R3,253.18
2018-09-14	0092289457	122815	R1,055.93
2017-09-26	0092156722	122815	R1,111.50
2018-09-14	0092289450	122815	R2,068.84
2018-02-16	0092228971	122815	R4,021,911.34
2018-09-21	0092289473	122815	R1,868.13

2. Select the specific outstanding invoice from the list
3. The outstanding 'Invoice Details' screen is displayed with the following information:
  1. Invoice status - This indicates whether the invoice has been paid or not.
  2. Invoice code - This indicates the code identifying the invoice, each invoice has a unique code.
  3. Invoice Received Date - This is the date that the invoice was created.
  4. PR Number - This is the PR number that is associated with the invoice, this relates to the hospital that the invoice is for.
  5. Hospital Name - This is the name of the hospital that the invoice is for.
  6. Invoice Amount - This is the amount outstanding as reflected on the invoice.
  7. PDF Document - This is the PDF of the invoice.

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

### Invoice Details

Invoice Status : UnPaid

Invoice Code : 0092289451

Invoice Date : 2018-09-14

HospAcc No. : 122815

Hospital : Chris Hani Baragwanath Hospital

Invoice Amount R3,253.18

Having difficulty viewing or printing the document? [Click here to open it in a new window.](#)

ITEM NUMBER	HOSPITAL NAME	DESCRIPTION	QTY	UNIT	AMOUNT
1	Chris Hani Baragwanath Hospital	Whole blood - Leucocyte depleted	1	UNIT	3,253.18
<b>TOTAL</b>					<b>3,253.18</b>

The following actions are available on the Outstanding invoice details screen:

1. [Downloading the outstanding invoice](#)
2. [Printing the outstanding invoice](#)

Note: Select the 'Having difficulty viewing or printing the document? Click here to open it in a new window.' link if you are having difficulty with viewing or printing the pdf document.

### 3.2.2.1. Downloading the outstanding invoice

There is a button (download logo) on the top right of the outstanding invoice pdf that allows the user to download the invoice.

The following steps will allow you to download the outstanding invoice pdf:

1. Navigate to the Invoice details screen (Refer to '[View Outstanding Invoice Details](#)')

2. Select the download button
3. The file will be downloaded to your computer

### 3.2.2.2. Printing the outstanding invoice

There is a button (printer logo) a the top right of the outstanding invoice pdf that allows the user to print the invoice.

The following steps will allow you to print the outstanding invoice pdf:

1. Navigate to the Invoice details screen (Refer to '[View Outstanding Invoice Details](#)')

Invoice Number  Search

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name

### Invoice Details

Invoice Status: UnPaid

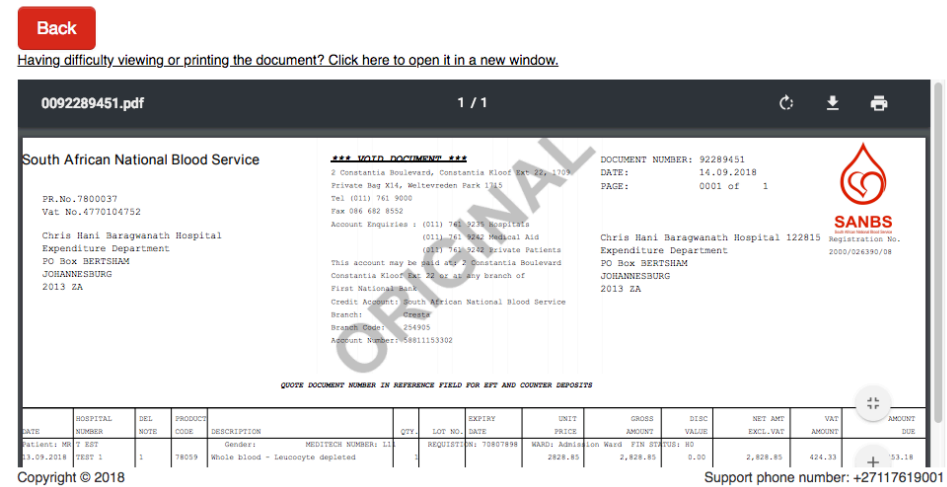
Invoice Code: 0092289451

Invoice Date: 2018-09-14

HospAcc No.: 122815

Hospital: Chris Hani Baragwanath Hospital

Invoice Amount: R3,253.18



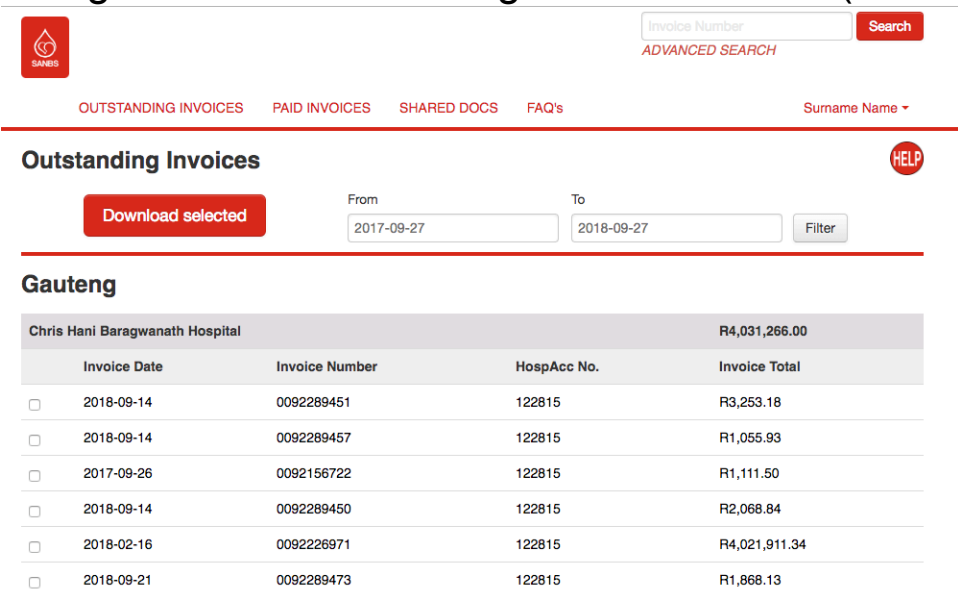
2. Select the print button
3. The printer options are displayed

Note: Select the 'Having difficulty viewing or printing the document? Click here to open it in a new window.' link if you are having difficulty with viewing or printing the pdf document.

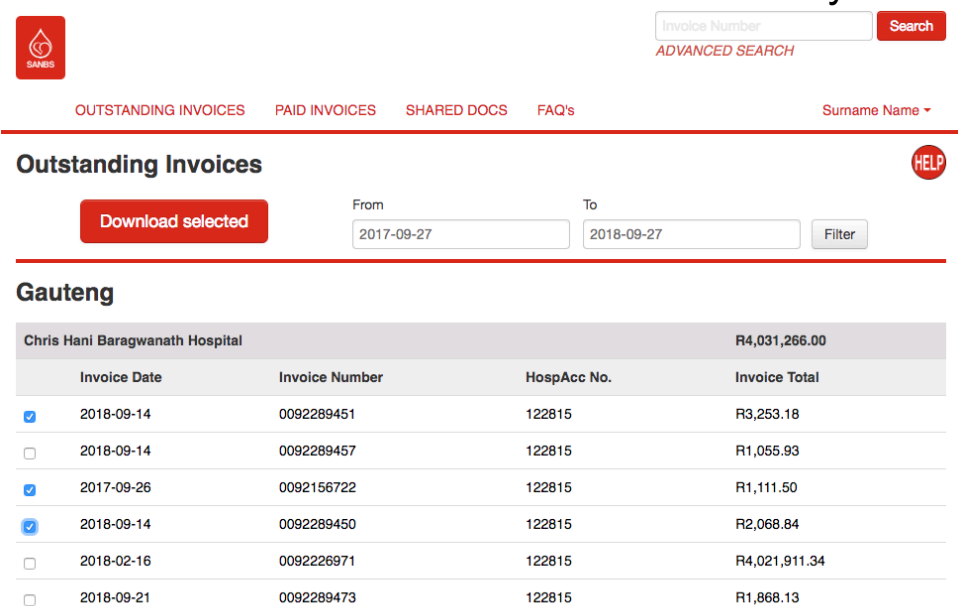
### 3.2.3. Download multiple outstanding invoices

The following steps will allow you to download the pdf's of multiple outstanding invoices:

1. Navigate to the outstanding invoices screen (refer to 'Outstanding Invoices')



2. Select the checkbox next to all the invoices you want to download



3. Select the 'Download Selected' button at the top of the screen
4. The following notification will be displayed at the top of the screen: 'Your invoice package is being prepared. You should receive an email shortly with instructions to download.'

5. An email will be sent containing a link that needs to be selected to download the pdf documents.

Hi Name Surname,

You recently requested a bulk invoice package, which is now ready to be downloaded [HERE](#).

SANBS Invoice Portal

6. Select the 'HERE' link in the email

7. A zip file will be downloaded containing all the invoice documents

### 3.2.4. Print a list of outstanding invoices

The following steps will allow you to print a list of all your outstanding invoices:

1. Navigate to the 'Outstanding Invoices' screen

Invoice Date	Invoice Number	HospAcc No.	Invoice Total
2018-09-14	0092289451	122815	R3,253.18
2018-09-14	0092289457	122815	R1,055.93
2017-09-26	0092156722	122815	R1,111.50
2018-09-14	0092289450	122815	R2,068.84
2018-02-16	0092226971	122815	R4,021,911.34
2018-09-21	0092289473	122815	R1,868.13

2. Right click on the screen

3. A list of options will be displayed

4. Select the 'Print' option

5. The printer options will be displayed.

## 3.3. Paid Invoices

This screen allows you to view a list of all the paid invoices that you have access too. If you don't have access to certain provinces or hospitals you will not be able to see their invoices. By selecting any one of the invoices it will display the invoice details screen for that invoice (Refer to '[View paid invoice details](#)').

How to navigate to this screen:

1. Select the 'Paid Invoices' menu item

2. The 'Paid Invoices' screen will be displayed

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name

**Paid Invoices** HELP

Download selected From 2017-09-27 To 2018-09-27 Filter

**Gauteng**

Chris Hani Baragwanath Hospital				R2,795,575.00	
Invoice Date	Invoice Number	HospAcc No.	Invoice Total	Payment Date	
<input type="checkbox"/>	2018-09-14	0092289442	122815	R18,681.29	2018-09-14T12:29:47.000Z
<input type="checkbox"/>	2018-10-30	CHB1810HHERV	122815	R1,388,447.00	2018-09-27T18:10:15.000Z
<input type="checkbox"/>	2018-10-30	CHB1810TPFQ	122815	R1,388,447.00	2018-09-27T18:10:25.000Z

The 'Paid Invoices' screen allows you to perform the following actions:

1. [Filter the paid invoices](#)
2. [View Paid Invoice Details](#)
3. [Download multiple paid invoices](#) (this downloads the pdf documents for multiple selected paid invoices)
4. [Print a list of paid invoices](#)

### 3.3.1. Filter the paid invoices

The following steps will allow you to filter the invoices by selecting a date range:

1. Navigate to the paid invoices screen (refer to '[Paid Invoices](#)')

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name

**Paid Invoices** HELP

Download selected From 2017-09-27 To 2018-09-27 Filter

**Gauteng**

Chris Hani Baragwanath Hospital				R2,795,575.00	
Invoice Date	Invoice Number	HospAcc No.	Invoice Total	Payment Date	
<input type="checkbox"/>	2018-09-14	0092289442	122815	R18,681.29	2018-09-14T12:29:47.000Z
<input type="checkbox"/>	2018-10-30	CHB1810HHERV	122815	R1,388,447.00	2018-09-27T18:10:15.000Z
<input type="checkbox"/>	2018-10-30	CHB1810TPFQ	122815	R1,388,447.00	2018-09-27T18:10:25.000Z

2. Select the 'From Date'
3. Select the 'To Date'
4. Select the 'Filter' button
5. The list of invoices will not be filtered according to the selected dates

### 3.3.2. View Paid Invoice Details

This screen displays the details for a selected paid invoice.

The following steps will allow you to view the details for a paid invoice:

1. Navigate to the paid invoices screen (refer to '[Paid Invoices](#)')

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name

**Paid Invoices** HELP

Download selected From 2017-09-27 To 2018-09-27 Filter

**Gauteng**

Chris Hani Baragwanath Hospital				R2,795,575.00	
Invoice Date	Invoice Number	HospAcc No.	Invoice Total	Payment Date	
<input type="checkbox"/>	2018-09-14	0092289442	122815	R18,681.29	2018-09-14T12:29:47.000Z
<input type="checkbox"/>	2018-10-30	CHB1810HHERV	122815	R1,388,447.00	2018-09-27T18:10:15.000Z
<input type="checkbox"/>	2018-10-30	CHB1810TPFQ	122815	R1,388,447.00	2018-09-27T18:10:25.000Z

2. Select a paid invoice from the list of paid invoices
3. The paid 'Invoice Details' screen is displayed with the following information":
  1. Invoice status - This indicates weather the invoice has been paid or not.
  2. Invoice code - This indicates the code identifying the invoice, each invoice has a unique code.
  3. Invoice Received Date - This is the date that the invoice was created.
  4. PR Number - This is the PR number that is associated with the invoice, this relates to the hospital that the invoice is for.
  5. Hospital Name - This is the name of the hospital that the invoice is for.
  6. Invoice Amount - This is the amount outstanding as reflected on the invoice.
  7. PDF Document - This is the pdf of the invoice.

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQs Surname Name ▾

### Invoice Details HELP

Invoice Status :

Invoice Code :

Invoice Date :

HospAcc No. :

Hospital :

Invoice Amount

[Back](#)

[Having difficulty viewing or printing the document? Click here to open it in a new window.](#)

DATE	HOSPITAL	DEL	PRODUCT	DESCRIPTION	QTY	UNIT	PRICE	AMOUNT	TAXES	NET AMT	VAT	AMOUNT
14.09.2018	TEST 1	1	78040	Red cell concentrate (in additive solution)	10	UNIT	1624.46	16,244.60	0.00	16,244.60	2,436.62	18,681.22

The following actions are available on the Outstanding invoice details screen:

- [Downloading the paid invoice](#)
- [Printing the paid invoice](#)

Note: Select the 'Having difficulty viewing or printing the document? Click here to open it in a new window.' link if you are having difficulty with viewing or printing the pdf document.

### 3.3.2.1. Downloading the paid invoice

There is a button (download logo) on the top right of the pdf document that allows the user to download the invoice.

- Navigate to the paid invoice details screen (Refer to [View Paid Invoice Details](#))

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQs Surname Name ▾

### Invoice Details HELP

Invoice Status :

Invoice Code :

Invoice Date :

HospAcc No. :

Hospital :

Invoice Amount

[Back](#)

[Having difficulty viewing or printing the document? Click here to open it in a new window.](#)

- Select the download button
- The file will be downloaded to your computer

### 3.3.2.2. Printing the paid invoice

There is a button (printer logo) at the top right of the pdf document that allows the user to print the invoice.

- Navigate to the paid invoice details screen (Refer to [View Paid Invoice Details](#))

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

### Invoice Details

Invoice Status:

Invoice Code:

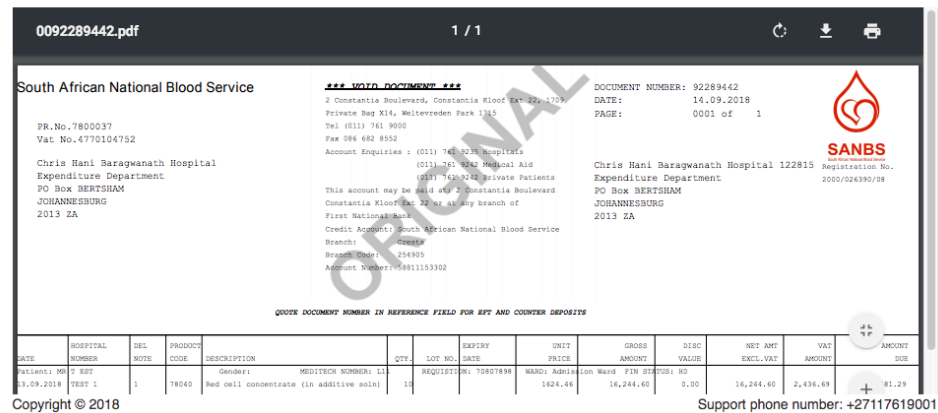
Invoice Date:

HospAcc No.:

Hospital:

Invoice Amount:

Having difficulty viewing or printing the document? [Click here to open it in a new window.](#)

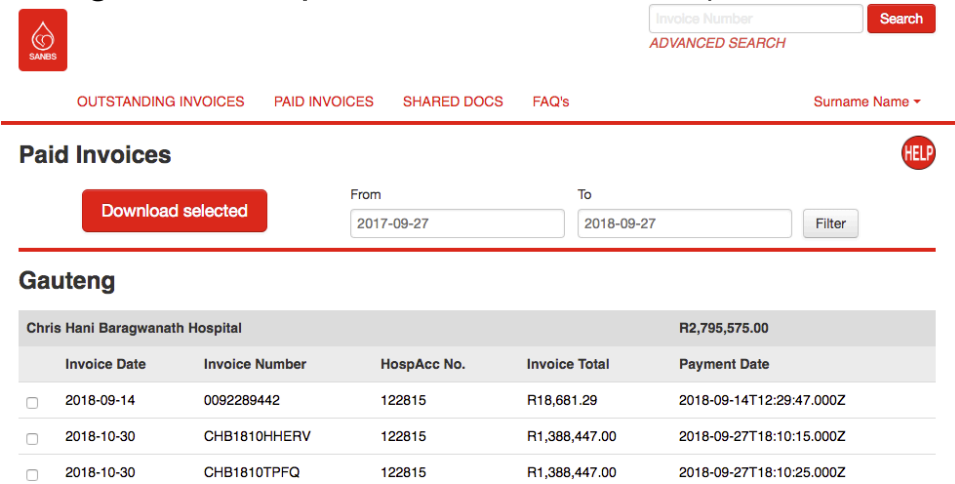


2. Select the print button
3. The printer options are displayed

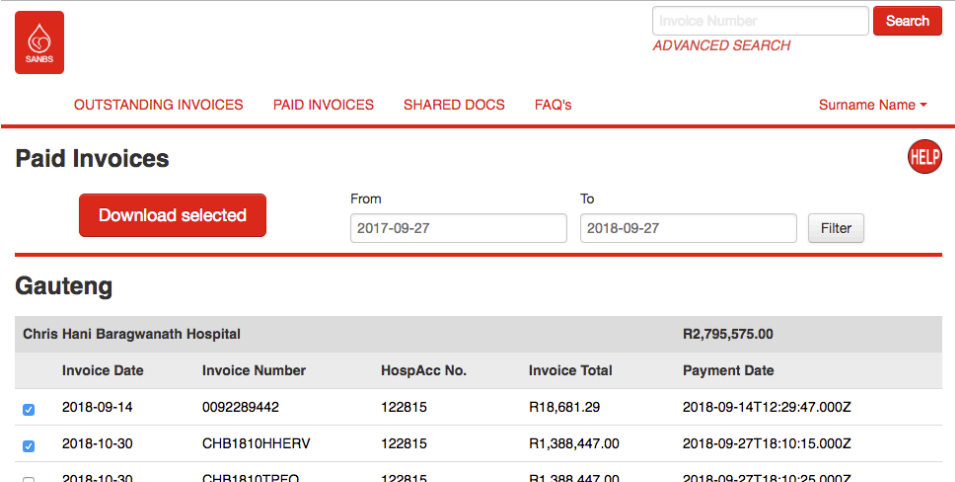
### 3.3.3. Download multiple paid invoices

The following steps will allow you to download the pdf's of multiple paid invoices:

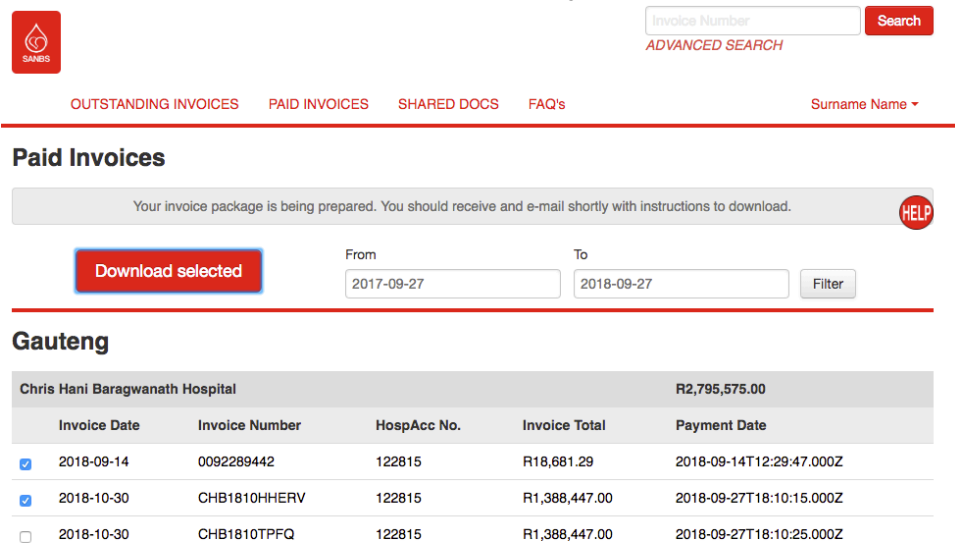
1. Navigate to the paid invoices screen (refer to '[Paid Invoices](#)')



2. Select the checkbox next to all the invoices you want to download



3. Select the 'Download Selected' button at the top of the screen
4. The following notification message will be displayed at the top of the screen: 'Your invoice package is being prepared. You should receive an email shortly with instructions to download'



5. An email will be sent containing a link that needs to be selected to download the pdf documents.

Hi Name Surname,

You recently requested a bulk invoice package, which is now ready to be downloaded [HERE](#).

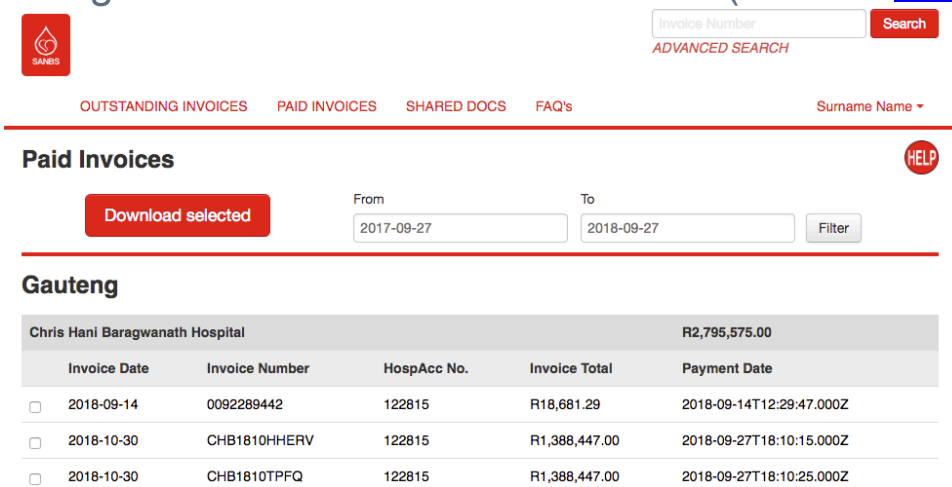
SANBS Invoice Portal

6. Select the 'HERE' link in the email
7. A zip file will be downloaded containing all the invoice documents

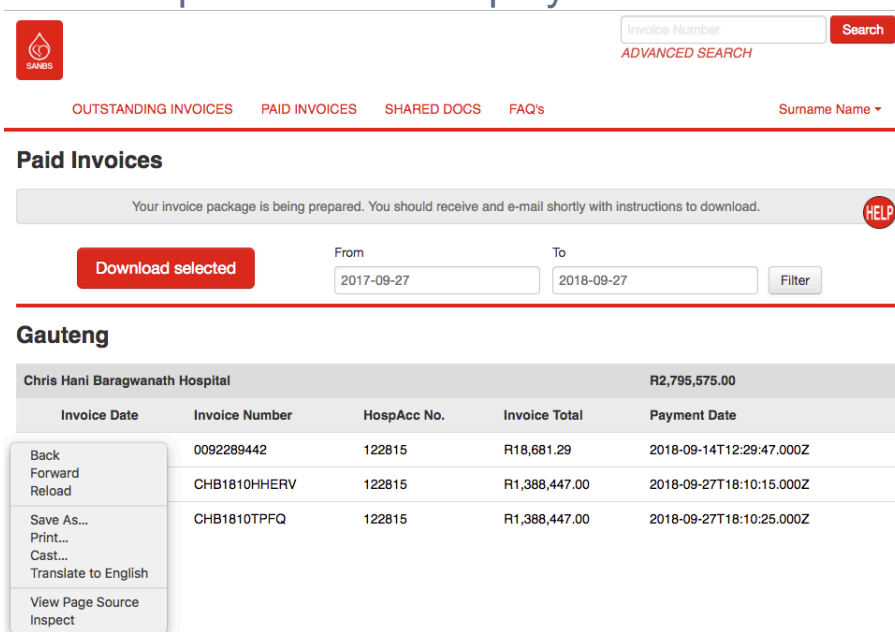
### 3.3.4. Print a list of paid invoices

The following steps will allow you to print a list of all your paid invoices:

1. Navigate to the 'Paid Invoices' screen (refer to '[Paid Invoices](#)')



2. Right click on the screen
3. A list of options will be displayed



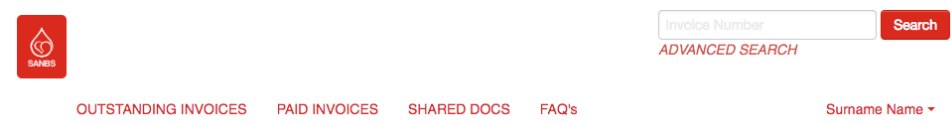
4. Select the 'Print' option
5. The printer options will be displayed

## 3.4. FAQ's

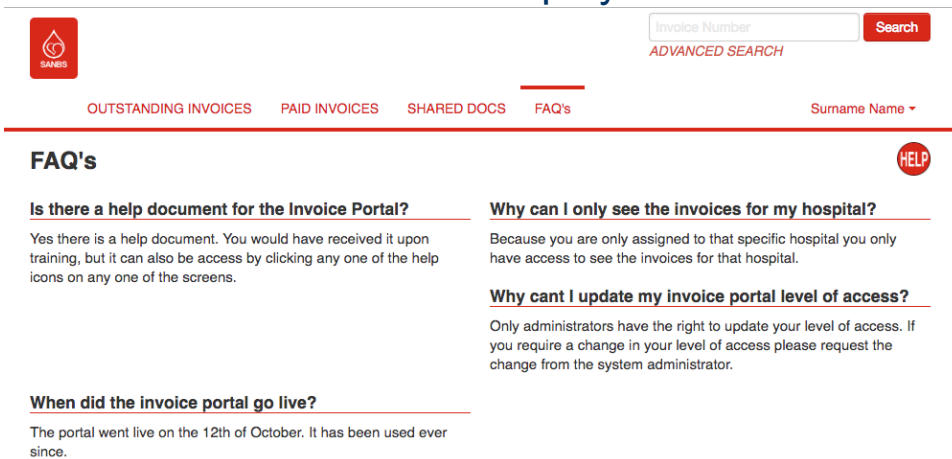
This screen shows all the frequently asked questions about the system.

How to navigate to this screen:

1. Select the FAQ's menu item



2. The FAQ's screen will be displayed

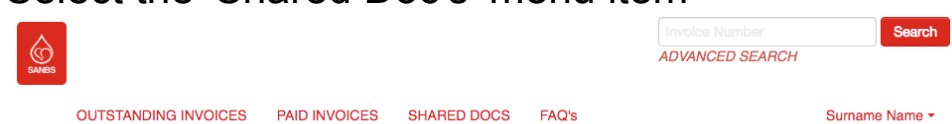


## 3.5. Shared Documents

This screen shows all the documents that you have access to. Viewing the documents will depend on your access level.

How to navigate to this screen:

1. Select the 'Shared Doc's' menu item



2. The 'Shared Documents' screen will be displayed



Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

**Shared Documents** HELP

**Gauteng**

Chris Hani Baragwanath Hospital

	Name	Size	Last Modified
<input type="checkbox"/>	0092289450.pdf	23517 /KB	2018-09-20T20:53:10.000Z
<input type="checkbox"/>	Budget summary report.xlsx	41257 /KB	2018-09-20T20:48:51.000Z
<input type="checkbox"/>	Chris Hani Baragwanath Hospital Arrears at at 31st August 2018.xlsx	28865 /KB	2018-09-21T08:58:37.000Z
<input type="checkbox"/>	Chris Hani Baragwanath Hospital_Usage_August2018.xlsx	2283491 /KB	2018-09-21T09:06:42.000Z
<input type="checkbox"/>	SANBS Invoice - 0091904992.pdf	23828 /KB	2018-09-21T08:57:21.000Z
<input type="checkbox"/>	ie11 download test.pdf	23549 /KB	2018-09-25T13:03:18.000Z

The following actions can be performed on the Shared documents screen:

1. [Download multiple shared documents](#)

### 3.5.1. Download multiple shared documents

The following steps allow you to download multiple shared documents:

1. Navigate to the shared documents screen (refer to '[Shared Documents](#)')

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

**Shared Documents** HELP

**Gauteng**

Chris Hani Baragwanath Hospital

	Name	Size	Last Modified
<input checked="" type="checkbox"/>	0092289450.pdf	23517 /KB	2018-09-20T20:53:10.000Z
<input checked="" type="checkbox"/>	Budget summary report.xlsx	41257 /KB	2018-09-20T20:48:51.000Z
<input checked="" type="checkbox"/>	Chris Hani Baragwanath Hospital Arrears at at 31st August 2018.xlsx	28865 /KB	2018-09-21T08:58:37.000Z
<input type="checkbox"/>	Chris Hani Baragwanath Hospital_Usage_August2018.xlsx	2283491 /KB	2018-09-21T09:06:42.000Z
<input type="checkbox"/>	SANBS Invoice - 0091904992.pdf	23828 /KB	2018-09-21T08:57:21.000Z
<input type="checkbox"/>	ie11 download test.pdf	23549 /KB	2018-09-25T13:03:18.000Z

2. Select multiple documents by selecting the checkbox next to the documents

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

**Shared Documents** HELP

**Gauteng**

Chris Hani Baragwanath Hospital

	Name	Size	Last Modified
<input checked="" type="checkbox"/>	0092289450.pdf	23517 /KB	2018-09-20T20:53:10.000Z
<input checked="" type="checkbox"/>	Budget summary report.xlsx	41257 /KB	2018-09-20T20:48:51.000Z
<input checked="" type="checkbox"/>	Chris Hani Baragwanath Hospital Arrears at at 31st August 2018.xlsx	28865 /KB	2018-09-21T08:58:37.000Z
<input type="checkbox"/>	Chris Hani Baragwanath Hospital_Usage_August2018.xlsx	2283491 /KB	2018-09-21T09:06:42.000Z
<input type="checkbox"/>	SANBS Invoice - 0091904992.pdf	23828 /KB	2018-09-21T08:57:21.000Z
<input type="checkbox"/>	ie11 download test.pdf	23549 /KB	2018-09-25T13:03:18.000Z

3. Select the 'Download Selected' button

4. The following notification message is displayed at the top of the screen

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

**Shared Documents** HELP

Your shared docs package is being prepared. You should receive an e-mail shortly with instructions to download.

**Gauteng**

Chris Hani Baragwanath Hospital

	Name	Size	Last Modified
<input checked="" type="checkbox"/>	0092289450.pdf	23517 /KB	2018-09-20T20:53:10.000Z
<input checked="" type="checkbox"/>	Budget summary report.xlsx	41257 /KB	2018-09-20T20:48:51.000Z
<input checked="" type="checkbox"/>	Chris Hani Baragwanath Hospital Arrears at at 31st August 2018.xlsx	28865 /KB	2018-09-21T08:58:37.000Z
<input type="checkbox"/>	Chris Hani Baragwanath Hospital_Usage_August2018.xlsx	2283491 /KB	2018-09-21T09:06:42.000Z
<input type="checkbox"/>	SANBS Invoice - 0091904992.pdf	23828 /KB	2018-09-21T08:57:21.000Z
<input type="checkbox"/>	ie11 download test.pdf	23549 /KB	2018-09-25T13:03:18.000Z

5. An email will be sent containing a link that needs to be selected to download the documents. Click the 'Invoice Portal Shared Document Download' email.

Hi Name Surname,

You recently requested a bulk document package, which is now ready to be downloaded [HERE](#).

SANBS Invoice Portal

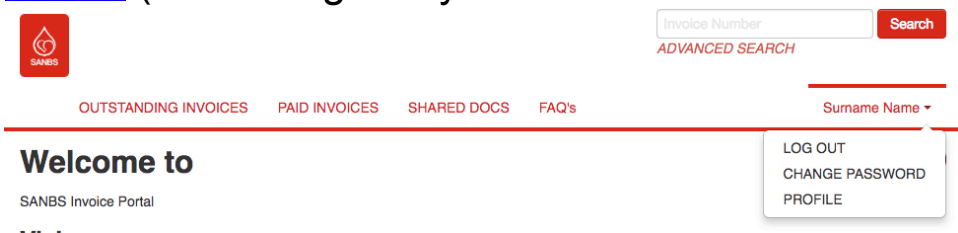
6. Select the 'HERE' link in the email
7. A zip file will be downloaded containing all the documents

Note: Whenever the administrator adds a new document that you have access to see, you will receive a notification. (refer to 'Emails')

## 3.6. User Options

This is the user icon with your name and surname on the top right of the screen. The following sub menu options:

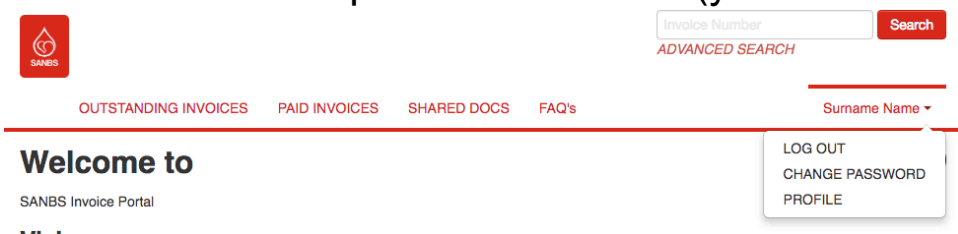
1. [Log out](#) (This logs you out of the Invoice Portal and navigates you back to the login screen)
2. [Change password](#) (This navigates you to the Change Password screen that allows you to change/update your password)
3. [Profile](#) (This navigates you to the Profile screen which allows you to view/update your information)



### 3.6.1. Log out

The following steps will allow you to log out of the Invoice Portal:

1. Select the 'User Options' menu item (your name and surname)

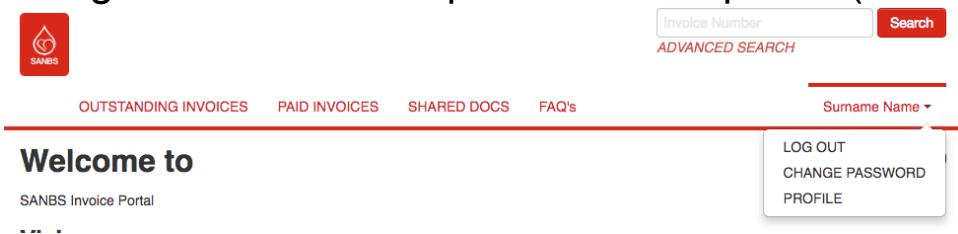


2. Select the 'Log out' sub menu option
3. The login screen will be displayed (refer to [Login](#)). You are now successfully logged out of the Invoice Portal.

### 3.6.2. Change password

The following steps will allow you to change your Invoice Portal password:

1. Navigate to the 'User Options' menu options (refer to [User Options](#))



2. Select the 'Change password' sub menu option
3. The 'Change Password' screen is displayed

A screenshot of the 'Change Password' screen in the SANBS Invoice Portal. It features a 'HELP' button in the top right corner. The form includes an 'Email' field with the value 'invoiceportal1@yahoo.com', a 'Current Password' field with the placeholder 'Enter current password', a 'New Password' field with the placeholder 'Enter new password' and a note '(Length : 8 characters, Required - Numbers, Special Character, Uppercase, Lowercase)', and a 'Confirm your password' field with the placeholder 'Enter user name'. There are 'Back' and 'Submit' buttons at the bottom.

4. Enter the following details:
  1. Current password (the password currently used to log in to the system)
  2. New password (the new password you want to use to log in to the system)
  3. Confirm your password (the new password you want to use to log in to the system)
5. Select the 'Submit' button
6. If the change was successful the following notification message will be displayed: "Your password has been changed"

7. If the change was not successful the appropriate error message will be displayed at the top of the screen

### 3.6.3. Profile

This screen allows you to view your user details. The following steps allow you to view your user details:

1. Select the 'User Options' menu item

2. Select the 'Profile' sub menu option

3. The 'Profile' screen will be displayed with the following information:

1. Name
2. Surname
3. Email
4. Contact number
5. Designation
6. Level of access
7. Province (If your level of access is 'Provincial' or 'Hospital')
8. Hospital (If your level of access is 'Hospital')
9. Status

The following actions can be performed on the 'Profile' screen

1. [Update user details](#)

#### 3.6.3.1. Update user details

The following steps will allow you to update your details:

1. Navigate to the 'Profile' user options sub menu option (refer to ['Profile'](#))
2. The 'Profile' screen will be displayed

3. Update the required information
  1. Name
  2. Surname
  3. Contact number
  4. Designation
4. Select the 'Update' button
5. If the update was successful the following notification message will be displayed: 'Successfully updated user'.

## 3.7. Search

This option is displayed at the top right corner of the screen.

The following steps will allow you to search for a specific invoice:

1. Enter the invoice number in the 'Search' box

2. Select the 'Search' button
3. The 'Advanced Search' screen will be displayed listing the matching search results

Date of Invoice	Invoice Number	HospAcc No.	Invoice Total	Payment Date	Invoice Payment Status	Hospital Name	Province Name
2018-09-14	0092289451	122815	3253.18		unpaid	Chris Hani Baragwanath Hospital	Gauteng

4. To view the details for one of the invoices select the invoice from the list

Note: If none of the invoices in the system match the criteria entered in the search the following message will be displayed: 'No match was found'.

## 3.8. Advanced Search

This option is displayed at the top right corner of the screen, underneath the search box. The following steps will allow you to do an advanced search:

1. Select the 'Advanced Search' link

2. The 'Advanced Search' screen will be displayed

451

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

## Advanced Search HELP

Invoice Code

Invoice Payment Status -- Choose payment status -- ▾

HospAcc No.

Hospital Name

- Enter/select the preferred search criteria in the appropriate fields
  - Invoice code
  - Invoice payment status (Selection)
    - Paid
    - Unpaid
  - HospAcc No.
  - Hospital Name
- Select the 'Search' button
- The matching search results will be displayed. To view any one of the items in the list just select the item and the 'Invoice Details' screen will be displayed.

Invoice Number

ADVANCED SEARCH

OUTSTANDING INVOICES PAID INVOICES SHARED DOCS FAQ's Surname Name ▾

## Advanced Search HELP

Invoice Code

Invoice Payment Status Unpaid ▾


HospAcc No. B15

Hospital Name Bar

Date of Invoice	Invoice Number	HospAcc No.	Invoice Total	Payment Date	Invoice Payment Status	Hospital Name	Province Name
2018-09-14	0092289451	122815	3253.18		unpaid	Chris Hani Baragwanath Hospital	Gauteng
2018-09-14	0092289457	122815	1055.93		unpaid	Chris Hani Baragwanath Hospital	Gauteng
2017-09-26	0092156722	122815	1111.50		unpaid	Chris Hani Baragwanath Hospital	Gauteng
2018-09-14	0092289450	122815	2068.84		unpaid	Chris Hani Baragwanath Hospital	Gauteng
2018-02-16	0092226971	122815	4021911.34		unpaid	Chris Hani Baragwanath Hospital	Gauteng
2018-09-21	0092289473	122815	1868.13		unpaid	Chris Hani Baragwanath Hospital	Gauteng

Note: The search criteria can be changed to either further filter the list or change the current filter that is applied. If none of the invoices in the system match the criteria entered in the search the following message will be displayed: 'No match was found'.

## 4. Help

This is the question mark  in the right hand corner of the screen just below the user options. When selecting the help icon you are navigated to the online help document, specifically the section of the document that talks to the screen that you are currently on.

## 5. Emails

The following emails are sent to users depending on the action that was performed:

- Invoice Portal Email Activation Code (This email is sent when you have completed registering as a user. The email contains an activation code which you have to use to verify your account)

Hi Name Surname,

You have registered as a user on the Invoice portal. Please use the following code to activate your account: 301559.

Thank you,

SANBS Invoice Portal

- Invoice Portal Account Approved (This email is sent when an administrator has approved your user registration request. It informs you that you are now an active user on the Invoice Portal and can now log in.)

Hi Name Surname,

Your SANBS Invoice Portal account has been approved.

Thank you,

SANBS Invoice Portal

- Invoice Portal Account Disabled (This email is sent when an administrator has disabled your user account on the system.)

You will no longer be able to log in to the system)

Hi Name Surname,

final, Invoice Portal account has been disabled. Please contact SANBS support with any queries.

Thank you,

SANBS Invoice Portal

4. Invoice Portal Account Rejected (This email is sent when an administrator has rejected your user registration request)

Hi Name Surname,

Your SANBS Invoice Portal account has been rejected.

Thank you,

SANBS Invoice Portal

5. Invoice Portal Password Reset (This email is sent when you select to reset your password. It contains the reset code that you need to reset your password with) (refer to '[Reset your password \(self help\)](#)')

Dear Name Surname,

According to our records, you requested to have your password reset. Please use this code to reset your password: 054922

Thank you,

SANBS Invoice Portal

6. Invoice Portal New Invoice Uploaded (This email is sent when a new invoice has been added to your invoice list)

Hi Name Surname,

A new invoice to the amount of R1388447 is due 2018-10-30.

Thank you,

SANBS Invoice Portal

7. Invoice Portal Shared Document Uploaded (this email is sent when a new document has been added to your shared documents list)

Hi Name Surname,

A new shared document has been uploaded for Chris Hani Baragwanath Hospital. You can log on to the portal to view it.

Thank you,

SANBS Invoice Portal

8. Invoice Portal Hospital Enabled (This email is sent when a hospital, that you have access to, has been enabled)

Hi Name Surname,

Your SANBS Invoice Portal Hospital, Chris Hani Baragwanath Hospital has been disabled.

Thank you,

SANBS Invoice Portal

9. Invoice Portal Hospital Disabled (This email is sent when a hospital, that you have access to, has been disabled)

Hi Name Surname,

Your SANBS Invoice Portal Hospital, Chris Hani Baragwanath Hospital has been disabled.

Thank you,

SANBS Invoice Portal

10. Invoice Portal Temporary Password (This email is sent when an administrator has created your account on the Invoice Portal)

Hi Name Surname,

You have been registered as a user on the Invoice portal with username invoiceportal2@yahoo.com. Please use the following password to log on to your account: P@ssword1.

Thank you,

SANBS Invoice Portal

11. Invoice Portal Package Ready (This email is sent when you have downloaded either multiple invoices or multiple shared documents)

Hi Name Surname,

You recently requested a bulk invoice package, which is now ready to be downloaded [HERE](#).

SANBS Invoice Portal