



POS Collect

Operator Self-Service User Guide

Last Updated September
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CONTENTS

OVERVIEW	<u>2</u>
LOGGING IN	<u>3</u>
THE DASHBOARD	<u>4</u>
UPDATING YOUR PASSWORD	<u>5</u>
REGISTERING A NEW AGREEMENT	<u>6</u>
VIEWING AGREEMENTS	<u>7</u>
EDITING AGREEMENTS	<u>8</u>
FAQS	<u>9</u>

Overview

What is the Operator Self Service Portal?

Operators who choose to utilize the POS Service Fee feature within POS will have the commercial arrangement details uploaded into this secure, self-service portal. These details will then be automatically fed into your POS device, available within a few moments, after you have synced the POS.



COEX
CONTAINER EXCHANGE

CONTENTS

OVERVIEW	2
LOGGING IN	3
THE DASHBOARD	4
UPDATING YOUR PASSWORD	5
REGISTERING A NEW AGREEMENT	6
VIEWING AGREEMENTS	7
EDITING AGREEMENTS	8
FAQS	9

Logging in to your Self-Service Portal

Logging In

Your Regional Manager will provide you with your login credentials.

URL:

<https://coex.saas.saasam.com.au/site/coex/login.html>

Enter the email address and password.

Click **LOG IN**

NOTE: For first time log in, please ensure once you have logged in, you reset your password under Your Profile in the Self Service Portal. Refer [Slide 6](#)

NOTE: To protect your data, Where a member of your organisation has had access to your login details, and have now left the organisation. Please ensure you immediately reset your password and contact your Network Lead to remove access.

Any log in issues, please reach out to your Network Lead



COEX Container Exchange

Welcome to the COEX Login

Username: test@user.com

Password:

Log In

[Request Password](#)



CONTENTS

- OVERVIEW 2
- LOGGING IN 3
- THE DASHBOARD 4
- UPDATING YOUR PASSWORD 5
- REGISTERING A NEW AGREEMENT 6
- VIEWING AGREEMENTS 7
- EDITING AGREEMENTS 8
- FAQS 9

The Dashboard

The screenshot shows the COEX Container Exchange dashboard. At the top left is the COEX logo. On the right, it says 'User: test@example.com | Logout'. Below this are three buttons: 'Home', 'New', and 'View'. A red arrow points from a callout box 'Create a New Agreement' to the 'New' button. In the main content area, there is a paragraph: 'Use the *Commercial Agreements* section to register, view and maintain your entities commercial arrangements. These details will then be automatically fed into your POS device, updating at regular 60-minute intervals.' Below this are two links: 'Commercial Agreements' and 'All My Commercial Agreements'. A red arrow points from a callout box 'To view your Commercial Agreements, click All My Commercial Agreements' to the 'All My Commercial Agreements' link. On the right side of the dashboard, there is a search bar with the text 'Search:' and a 'Go' button.



CONTENTS

- OVERVIEW 2
- LOGGING IN 3
- THE DASHBOARD 4
- UPDATING YOUR PASSWORD 5
- REGISTERING A NEW AGREEMENT 6
- VIEWING AGREEMENTS 7
- EDITING AGREEMENTS 8
- FAQS 9

Updating your password

The screenshot shows a web interface for 'My Profile' for an 'External User'. At the top right, there are navigation tabs: Home, New, View, and My Profile (which is selected). Below the tabs, the page title is 'My Profile'. There are 'Save' and 'Cancel' buttons, and a menu icon. The main content area has a 'Contact Information' section with fields for First Name, Last Name, Direct Phone (040000000), and Mobile Phone. Below that is a 'User Information' section with a 'Password' field and a 'Change Password...' link. A dashed callout box with an arrow points to the 'Change Password...' link, containing the text 'Select to Change Password'. Another dashed callout box with an arrow points to the 'My Profile' tab, containing the text 'Select this Tab to view your contact information and password.'



CONTENTS

- OVERVIEW 2
- LOGGING IN 3
- THE DASHBOARD 4
- UPDATING YOUR PASSWORD 5
- REGISTERING A NEW AGREEMENT 6
- VIEWING AGREEMENTS 7
- EDITING AGREEMENTS 8
- FAQS 9

Registering a new Agreement

Use the “New” button to register any existing or new agreements you have between yourself and your commercial customers. Agreements stipulate the contractual arrangement between the Operator and a customer and are used to manage the service fees applicable to these arrangements.

Note: Whilst the agreement will be linked in the form to a particular site, **all** of the sites contracted under this Operator will have access to use this agreement in POS.

Save to register the agreement. → Save - Cancel - [Menu]

Drop down to select MAIN site this agreement will be linked to. → ID 58

Agreement Number is automatically populated and is not an editable field. → Agreement Number A4000058

Member Number linked to agreement. → Member Number

Member Reference is entered to assist with searching. → Member Name or Reference

Fee Type will be Flat Rate or per container. The Rate field will appear based on the type selected. → Fee Type Choose one

Start date of your agreement. → *Agreement Start Date

End Date is optional, if your agreement has an expiry date. → Agreement End Date

Notes and Attachments are optional fields for additional information (as needed) → Notes

Attachments Attach/Manage

Declaration to save and submit is a mandatory declaration. → I Agree

Drag and drop files

By clicking 'I agree' below and using this feature, on behalf of the Operator, you are directing Container Exchange (Qld) Limited (COEX) to allocate and pay the Member's refund amounts from claims during the above period at the nominated refund point to be paid in accordance with these instructions (Payment Direction). Further, you declare that: (1) the information provided is true, accurate and correct; (2) the Operator is authorised by the Member to disclose the agreement terms and make the Payment Direction to COEX; and (3) the Operator is entitled to the Fee. The Operator agrees it is solely responsible for all liability arising from its use of this feature and its commercial arrangements with Members. COEX is not responsible for reversing, correcting or retrieving any allocations made in accordance with submitted Payment Directions, or for any incorrect or delayed processing of Payment Directions or updates to them.



CONTENTS

- OVERVIEW 2
- LOGGING IN 3
- THE DASHBOARD 4
- UPDATING YOUR PASSWORD 5
- REGISTERING A NEW AGREEMENT 6
- VIEWING AGREEMENTS 7
- EDITING AGREEMENTS 8
- FAQS 9

Viewing your agreements

Use the VIEW Field to view all your existing agreements, search all fields via the +Add filters functionality, as well as export into a CSV file as required.

Search for Agreements

View is this current display.

New will create a new Agreement.

User: test@example.com | Logout

Home New View

My Commercial Agreements

Operator Commercial Agreements

All Operator Commercial Agreements

New Views [Home Icon] [Download Icon]

Search [Add filters]

1 record(s) found, 1 page(s). Click [here](#) to count records again.

<input type="checkbox"/>	Edit	Agreement Number	Member Number	Member Name or Reference	Operator Name	Fee Type	Rate	Per Container Rate	Agreement Start Date	Agreement End Date
<input type="checkbox"/>		A400000006	10,000,000		TEST Company	Flat Rate	\$15.00		Aug 02 2023	

This will edit the relevant Agreement

Download all agreements in current view, eg. including search filters.



CONTENTS

- OVERVIEW 2
- LOGGING IN 3
- THE DASHBOARD 4
- UPDATING YOUR PASSWORD 5
- REGISTERING A NEW AGREEMENT 6
- VIEWING AGREEMENTS 7
- EDITING AGREEMENTS 8
- FAQS 9

Editing your agreements

Use this function to edit existing agreement records.

Be sure to **Save** before exiting and sync your POS for the change to take effect.

The screenshot shows the 'My Commercial Agreements' page on the COEX website. The page title is 'My Commercial Agreements' and the sub-section is 'Operator Commercial Agreements'. There is a search bar and a '+ Add filters' button. A table lists one record with columns for 'Edit', 'Agreement Number', 'Member Number', and 'Member Name Reference'. The 'Edit' column contains a pencil icon, which is highlighted with a red arrow and a dashed box labeled 'Click to edit'. An edit modal is open over the table, titled 'My Commercial Agreements' and 'Operator Commercial Agreement'. The modal has 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. The modal contains the following details:

ID	25	Status	Active
Supplier Site Name	TEST ENTITY - TEST2		
Scheme Site ID	QC12015005		
*Member Number	12345678	Member Name or Reference	John Smith Brew
*Fee Type	Fixed Rate		
*Rate	\$ 1.00		

At the bottom of the modal, there are 'Details' and 'History' buttons, and a double arrow navigation icon.



CONTENTS

OVERVIEW	2
LOGGING IN	3
THE DASHBOARD	4
UPDATING YOUR PASSWORD	5
REGISTERING A NEW AGREEMENT	6
VIEWING AGREEMENTS	7
EDITING AGREEMENTS	8
FAQS	9

FAQ's

Forgot your password?

Select "Request Password" on the login screen and enter your email address to send a link.

Can I bulk import my agreements?

You can not bulk import agreements from your login, however support is available from COEX if you would like assistance to bulk import your existing agreements.

How long does it take for my changes in Self-Service to reflect in POS?

It should be available immediately after you save in Agiloft, and sync in POS.

What can I change after I have created the Agreement?

- Agreement Reference
- Agreement Start Date
- Agreement End Date

You can not change the Rate structure, or amount. If this is required, make the entry inactive and add todays date, and create a new entry.

