

## **POS Collect**

# Operator Self-Service User Guide

Last Updated September 2024

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### **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.



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## **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.

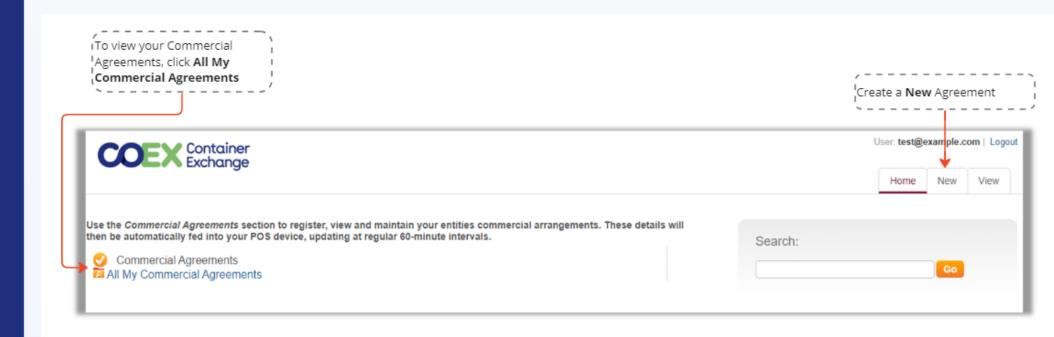
Any log in issues, please reach out to your Network Lead





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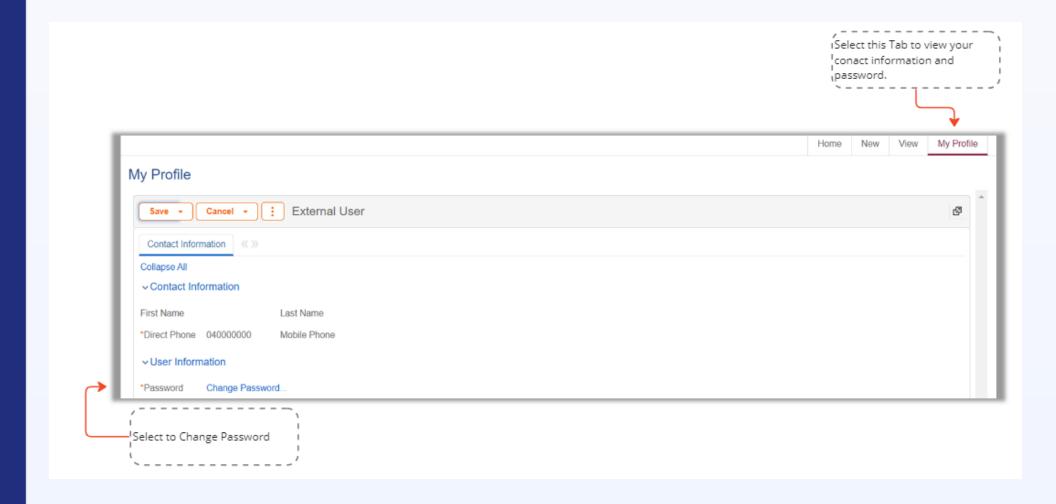
## The Dashboard





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## **Updating your password**





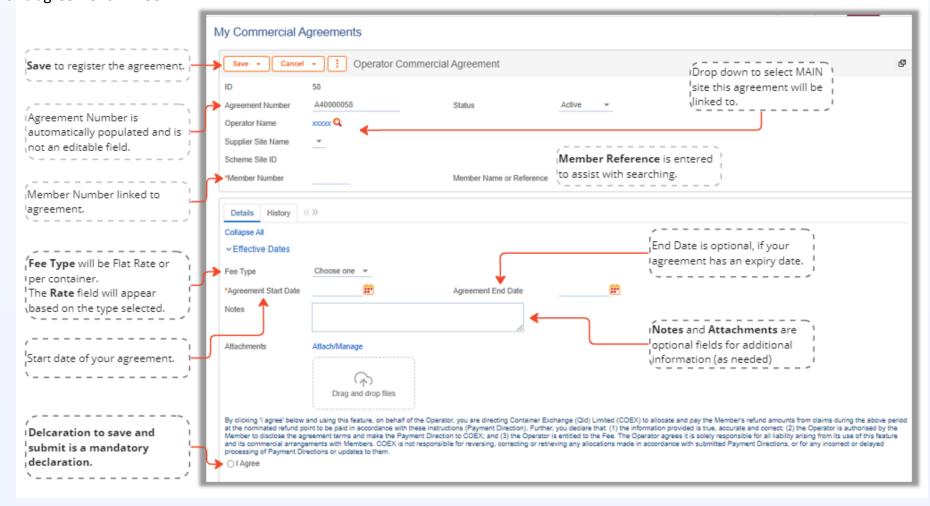
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## Registering a new Agreement

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.

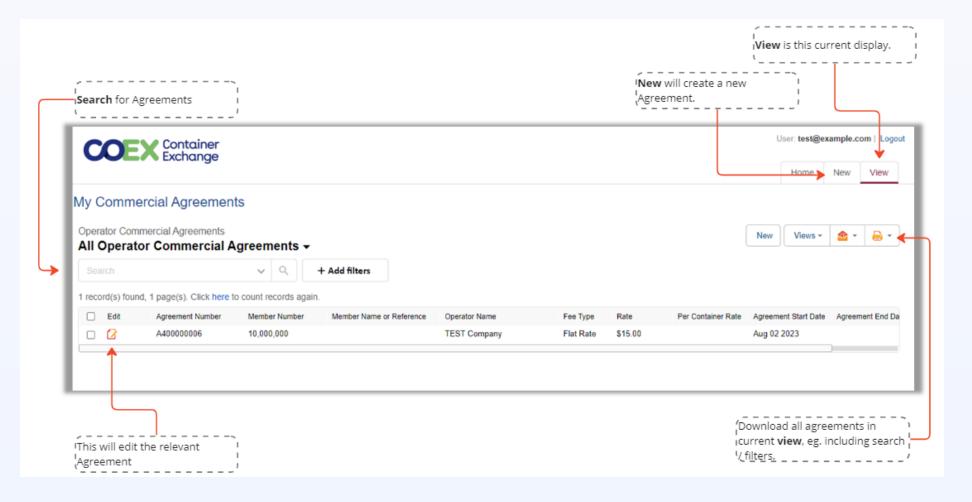




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## Viewing your agreements

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



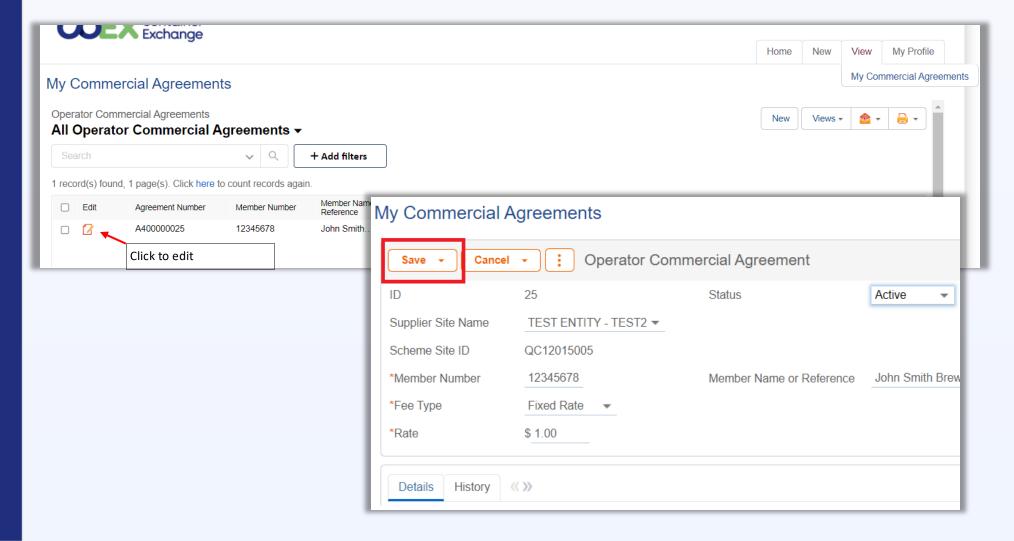


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## **Editing your agreements**

Use this function to edit existing agreement records.

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





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## 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.

