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Configuring CRE/RPE to connect to the OnCloudPortal

ConcloudPortal	(백년) - 8 × 3 이 무수 (19 - 19 × 3
OnCloudPortal	Register
Log	in
*	user@email.com
a	••••••
	Log in
	Forgot your password?
	Don't have an account yet? Register

This document provides information on how to setup and synchronize CRE/RPE to connect to the OnCloudPortal (OCP). The OCP allows you to view a dashboard of live sales data from your store through a web browser.

You **MUST** be using CRE/RPE version **12.70030** or higher to connect to the OCP. OCP access requires an update to your registration. Please contact your pcAmerica Account Manager or local reseller for further information.

Register an OnCloudPortal account

1. Open your web browser and in the address bar type oncloudportal.com then click on either of the **Register** buttons.

OnCloudPortal		
← → C n 🗎 https://www.oncloudportal.com/login		V 🖥 🏡 🐘 🕩
OnCloudPortal		Register
	2	
	Login	
	Email	
	password]
	Log in	
	Forgot your password?	
	or Don't have an account (et? Register	

 At the Sign Up page, complete the online form by entering your First Name, Last Name, User Name, password, and the same password again. When done click on Create Account.

	John	
	Doe	
×	OnCloudPortal.User@gmail.com	
Acco	unt Details JDoe2015	
T		

3. Click on Agree to continue.



4. Click on Return to OnCloudPortal.com.



5. Log into the email you registered; look for and open an email similar to the one below.

Gmail -	C Mo	re *			1-4 of 4 < >	\$ ×
COMPOSE	Primary	Social	Promotions	+		
Inbox (4) Starred	口 ☆ noreply	[OnCloudPortal]Thank yo	u for registering at www.oncloudportal.co	m - OnCloudPortal Message. Thank y	ou for registering with OnCloudPort	10:35 am
Sent Mail	🔲 🚖 Gmail Team	The best of Gmail, where	ver you are - Hi OnCloud Get the official Gm	ail app The best features of Gmail are	only available on your phone and	10:21 am
Drafts More -	🔲 📩 Gmail Team	Stay more organized with	Gmail's inbox - Hi OnCloud Gmail's inbox p	uts you in control Inbox video Meet th	e inbox Gmail's inbox sorts	10:21 am
	🗌 🚖 Gmail Team	Three tips to get the most	out of Gmail - Hi OnCloud Tips to get the m	nost out of Gmail Bring your contacts a	and mail into Gmail On your compu	10:21 am

6. Click on the **Activate Account** button.

noreply@oncloudpo to me ⊡	rtal.com <u>via</u> sendgrid.me	10:33 AM (3 minutes ago) 📩 🖡
	OnCloud Online POS Mana	Portal
	Thank you for registering with OnC An account has been registered with this em https://www.oncloudportal.com. Please activate selecting the link below: Activate Account	CloudPortal! nail address at your account by
	Once you have activated your account, you will with <u>OnCloudPortal.User@gmail.com</u> and the pr	be able to sign in assword that you

7. You should be directed and logged into the OnCloudPortal and be greeted with the screen below. If not, go back to the OCP home screen and type in your email address and password to log in. Click on **Store Setup** from the left side of the screen; type in a Company Name and click on **Continue**.

=	lonClou	dPortal	
<u>[dt]</u>	Dashboard	Charge	Setup Company Name
Y	Account Settings	Stores	
Ø\$	Store Setup		Note This name is a permanent identifier for your company and cannot be changed once set.
			Company Name pcAmerica Continue

8. Click on Add Store.



9. Fill in the information requested on the form and click on the **Save** button.

Store Name	Primary Phone
pcAmerica	845-920-0800
Store ID / Nickname	Secondary Phone
1001	800-342-5729
Primary Contact	Email
John Doe	OnCloudPortal.User@gmail.com
1 Blue Hill Plaza Address 2 City Pearl River	POS Not Connected Please follow the directions for your POS system to connect it to this Store.
State	
Postal (Zip) Code	
10965	
	Sava

10. If you need to make any changes to your entries, you may do so by clicking on the Edit button. Note: the connected status will be set to No until we initialize a connection from within CRE/RPE.

(C 🔒 https://w	ww.oncloudportal.c	om/stores			
=	🦲 OnClou	IdPortal				
<u>dul</u>	Dashboard	CI				
1	Account Settings	Stores				
Ø\$	Store Setup	Edit Store	Store ID	Connected	Phone Number	Email Ac
		Edit	1001	No	845-920-0800	OnCloud

11. From within CRE/RPE, go to Manager/Options > Setup > Setup Screen.

1 Cashier	B Cost Markup	C Customer Loyalty	D Price Levels	
2 Invoice Properties	Display Setup	F General Invoice Notes	G Setup Screen	
3 Tools	H Online Ordering Setup	Tax Rates	J Fouch Screen Configuration	E <u>x</u> it
4 Setup	Friendly Printer Setup	L Barcode Express	M Price Batches	
5 Administrative	N Self Service Configuration	O Virtual Pole Configuration		

12. Click on Internet Features > Other > Connect to OnCloudPortal.

count Control Compar	ny Info Couponi	ng Hardware	Internet Features	Inventory	Invoice Settin
Payment Processing	Quick Invoici	ng & Alerts	Quick-Add	Receipt	Reports
Restaurant Features	Station S	Specifics	System Access	1	ouch Screen
mail Settings Other					
Portal Settings					
URL		habled			
Portal ID	1				
0					
Username					
Password					
Password					
Social Loyalty Provider					
Service Provider	SNAP				
URL Send Lovalty Me	essages				
Cond Loyany Me	ussugus	1			
Username					
Password			Connect to		
		6	onCloudPortal		

13. Under the Connection tab, enter the username and password you registered with the OCP.

🖳 OCPManage		
Connection Manage		
Logi	n to OnCloudPortal to Sync your Store	
	Username	
	JDoe2015	
	Password	
	•••••	
	Connect	
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14. Click on the **Select** button.

Select	Store ID	Name	Email	Phone	Street	Street2
Select	1001	pcAmerica	OnCloudPortal.U	845-920-0800	1 Blue Hill Plaza	
	_					

15. Click Yes at the Confirm Selection prompt.



16. Wait for the screen below to appear. Note: to disconnect from the OCP you will need to enter your Username and Password again.



17. Go back to the OCP website and refresh your screen by hitting F5 on your keyboard, you should now see the store Connected status in green displaying CRE/RPE along with the version number.

←	C 🔒 http:	s://wv	ww.oncloudportal	.com/stores		
≡	👝 OnC	lou	dPortal			
h	Dashboard		CL			
·P.	Account Settings	•	Stores			
¢\$	Store Setup		Edit Store	Store ID	Connected	Phone
			Edit	1001	Cash Register Express	845-920

18. If you click on the Edit button under the Edit Store heading, it will also display a POS Connected confirmation. Note: you can disconnect the POS from the OCP, but you can only re-connect to it from within CRE/RPE.

- /	POS Connected
(Cash Register Express 12.7001
	Disconnect POS

19. Once a connection has been successfully established between the POS and the OCP, you can now view sales data by clicking on the **Dashboard** tab on the left side of the screen.



20. Here is a screenshot of the sales data the Dashboard screen will display. You can click on the headings on most of the individual panels to change the time and date criteria displayed for each. Data is refreshed automatically or can be done manually by clicking on the refresh button on the lower left of the browser window.

