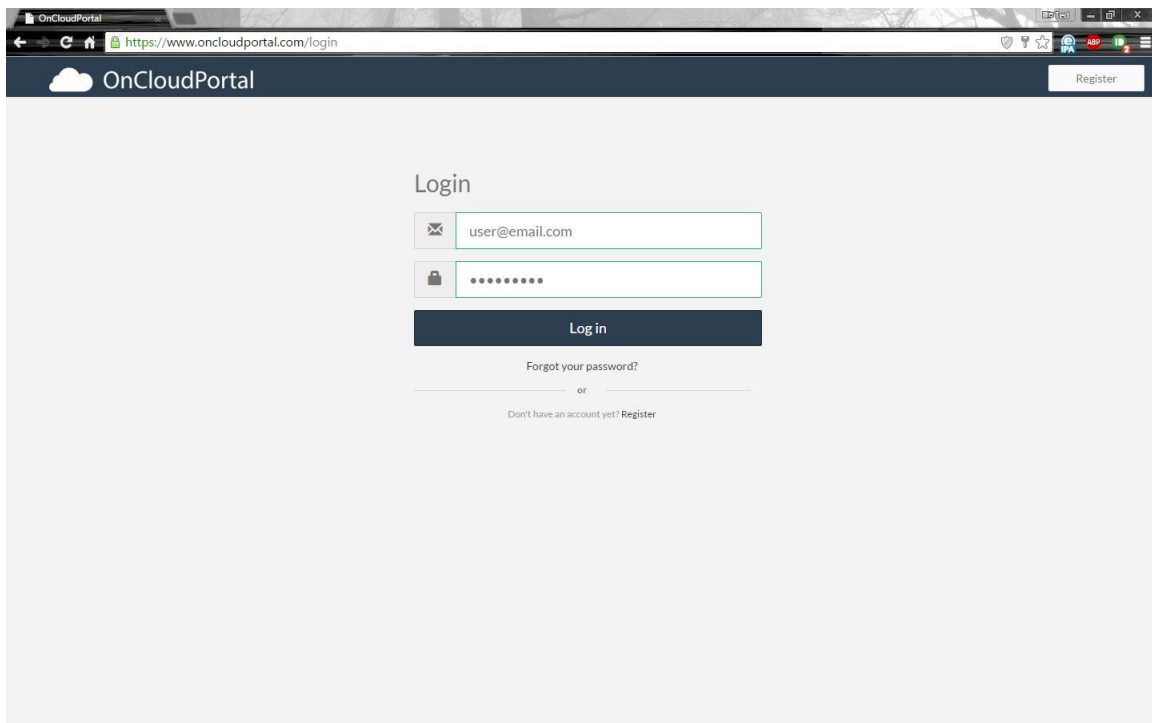


Configuring CRE/RPE to connect to the OnCloudPortal

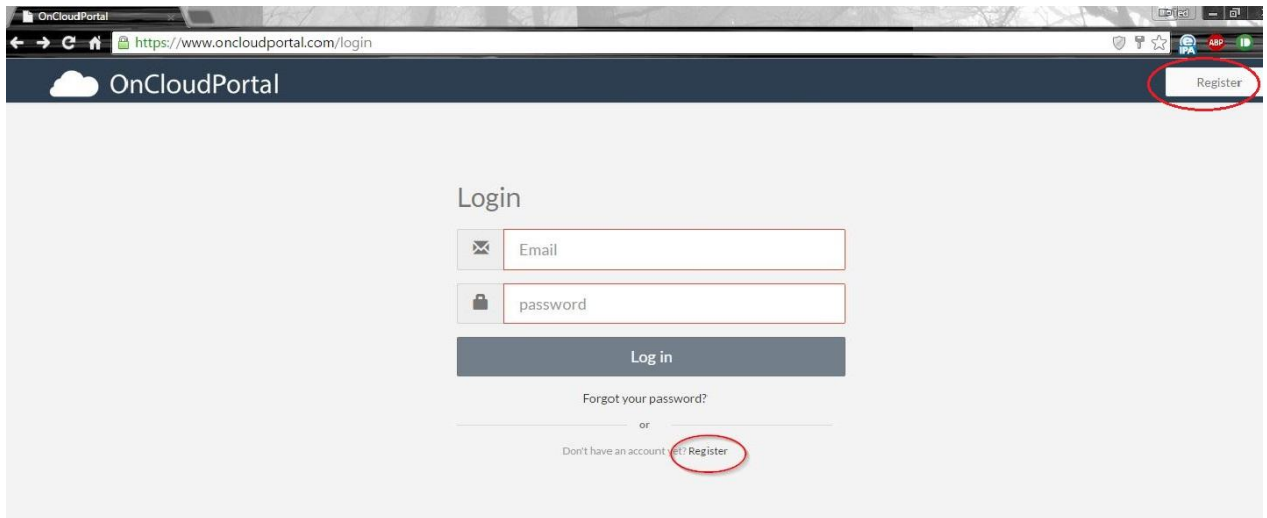


This document provides information on how to setup and synchronize CRE/RPE to connect to the OnCloudPortal (OCP). The OCP allows you to view a dashboard of live sales data from your store through a web browser.

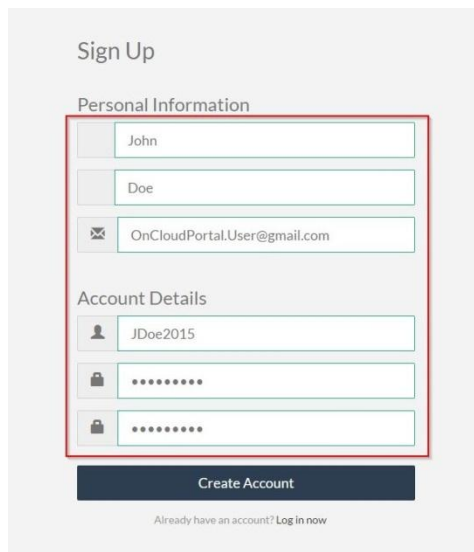
You **MUST** be using CRE/RPE version **12.70030** or higher to connect to the OCP. OCP access requires an update to your registration. Please contact your pcAmerica Account Manager or local reseller for further information.

Register an OnCloudPortal account

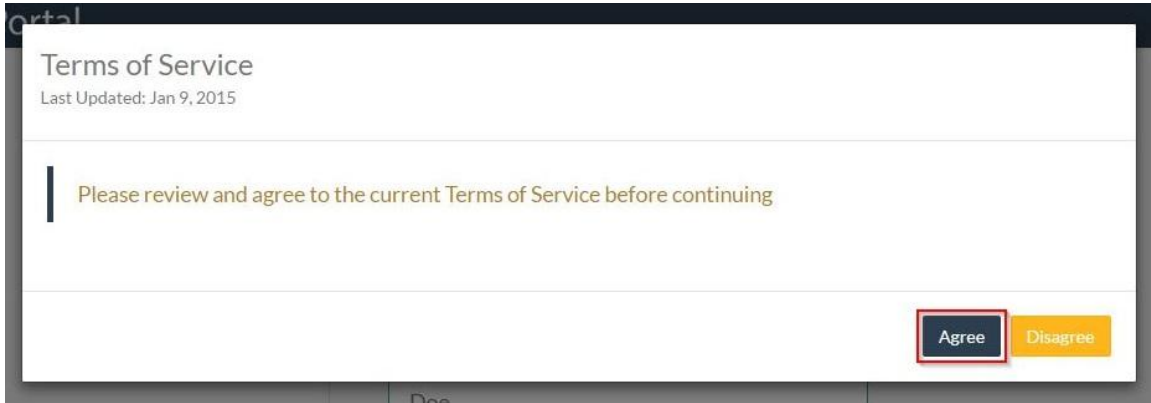
1. Open your web browser and in the address bar type oncloudportal.com then click on either of the **Register** buttons.



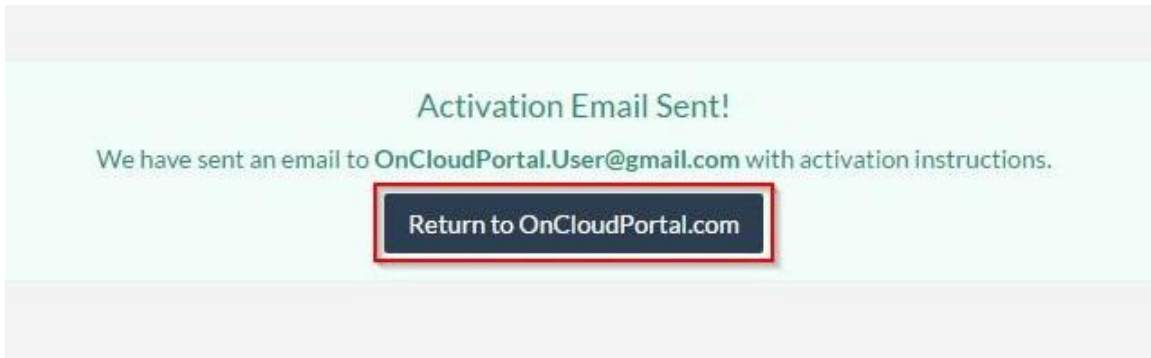
2. At the Sign Up page, complete the online form by entering your First Name, Last Name, User Name, password, and the same password again. When done click on **Create Account**.

A screenshot of the OnCloudPortal Sign Up page. The page is titled 'Sign Up' and is divided into two sections: 'Personal Information' and 'Account Details'. The 'Personal Information' section includes fields for 'First Name' (containing 'John'), 'Last Name' (containing 'Doe'), and 'Email' (containing 'OnCloudPortal.User@gmail.com'). The 'Account Details' section includes fields for 'User Name' (containing 'JDoe2015'), 'Password', and 'Confirm Password'. A 'Create Account' button is located at the bottom of the form. Below the button, there is a link that says 'Already have an account? Log in now'. The entire registration form area is enclosed in a red rectangular border.

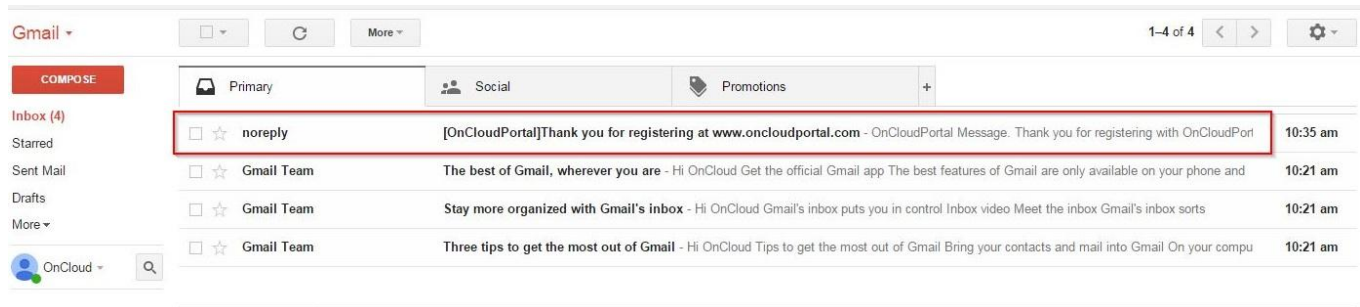
3. Click on **Agree** to continue.



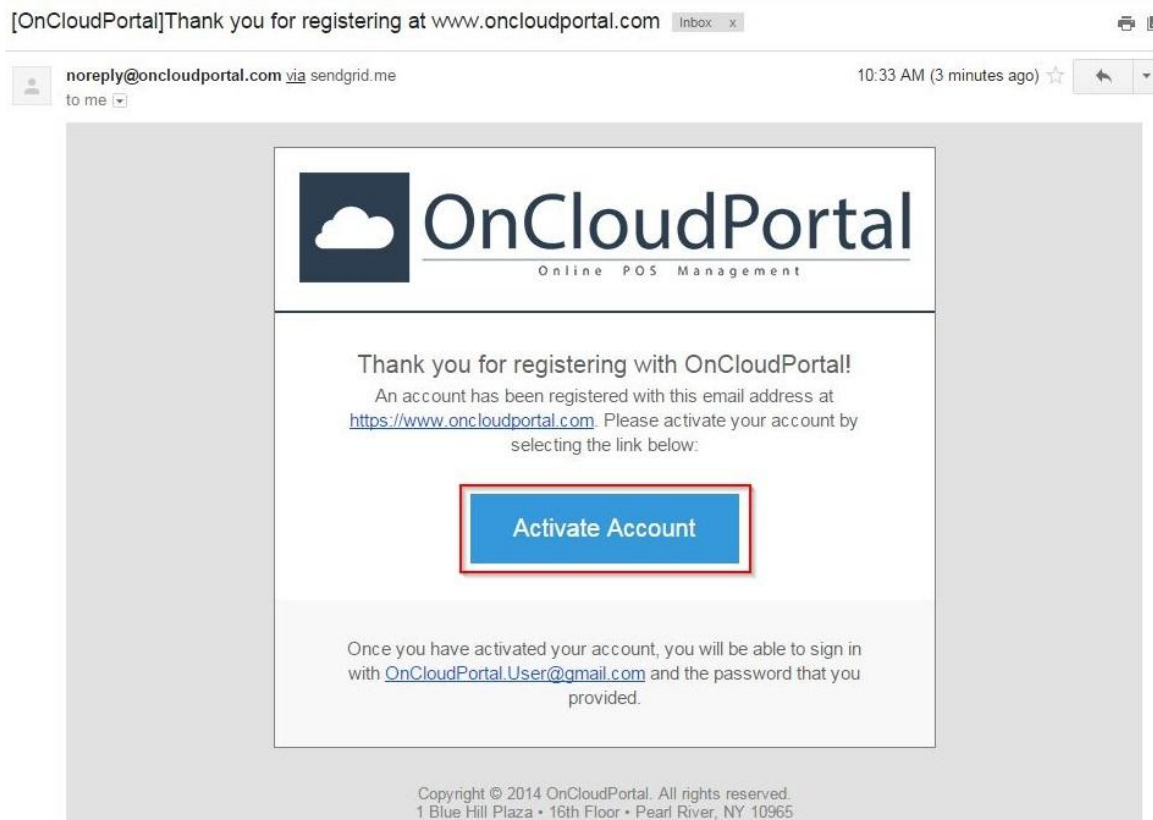
4. Click on **Return to OnCloudPortal.com**.



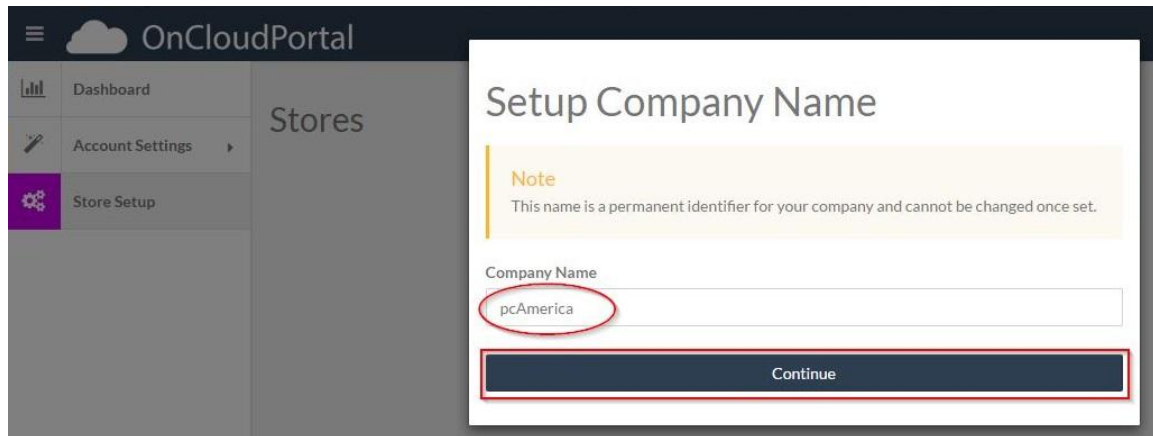
5. Log into the email you registered; look for and open an email similar to the one below.



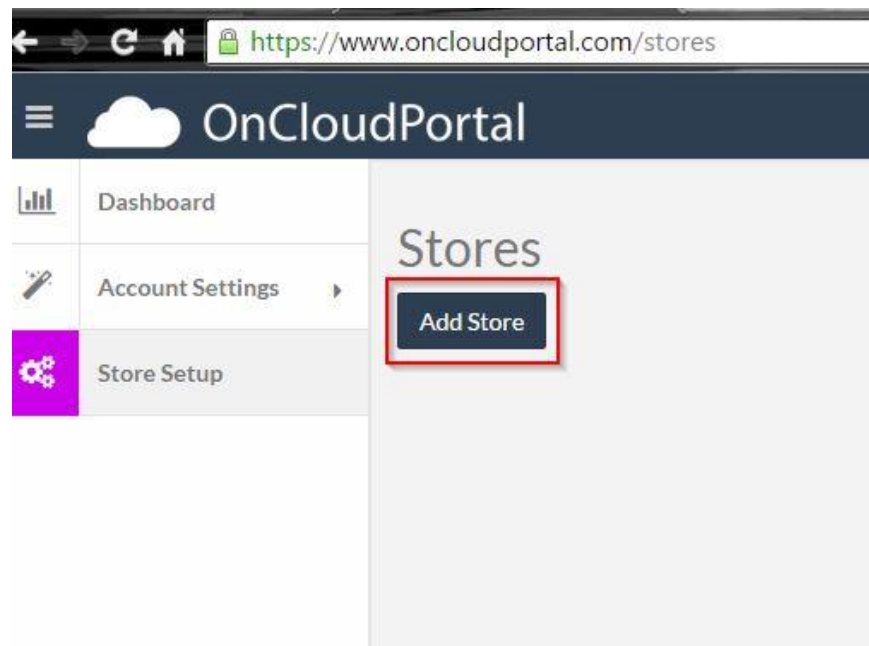
6. Click on the **Activate Account** button.



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**.



8. Click on **Add Store**.

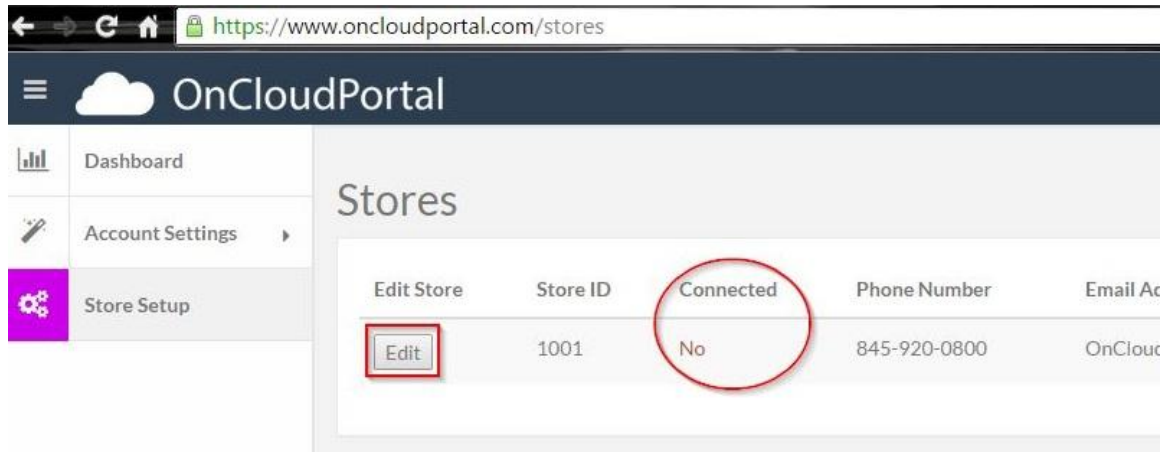


9. Fill in the information requested on the form and click on the **Save** button.

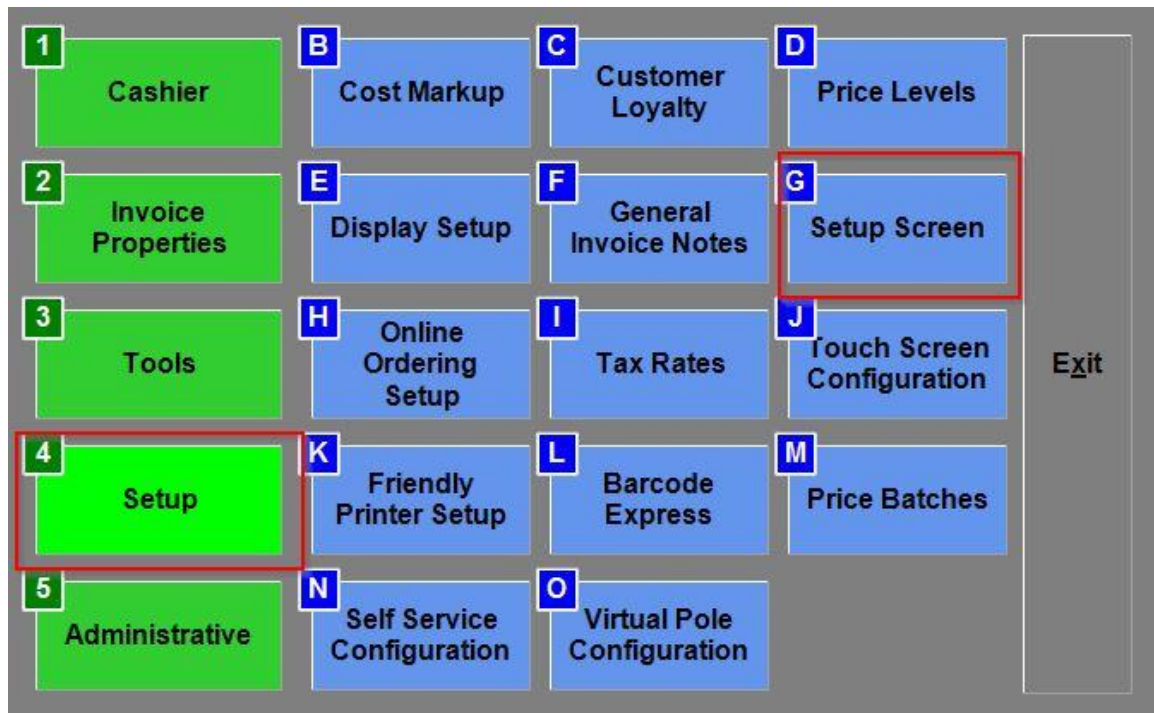
Add Store

Store Name	<input type="text" value="pcAmerica"/>	Primary Phone	<input type="text" value="845-920-0800"/>
Store ID / Nickname	<input type="text" value="1001"/>	Secondary Phone	<input type="text" value="800-342-5729"/>
Primary Contact	<input type="text" value="John Doe"/>	Email	<input type="text" value="OnCloudPortal.User@gmail.com"/>
Address	<input type="text" value="1 Blue Hill Plaza"/>	<div style="border: 1px solid #f08080; padding: 5px;">POS Not Connected Please follow the directions for your POS system to connect it to this Store.</div>	
Address 2	<input type="text"/>		
City	<input type="text" value="Pearl River"/>		
State	<input type="text" value="NY"/>		
Postal (Zip) Code	<input type="text" value="10965"/>		

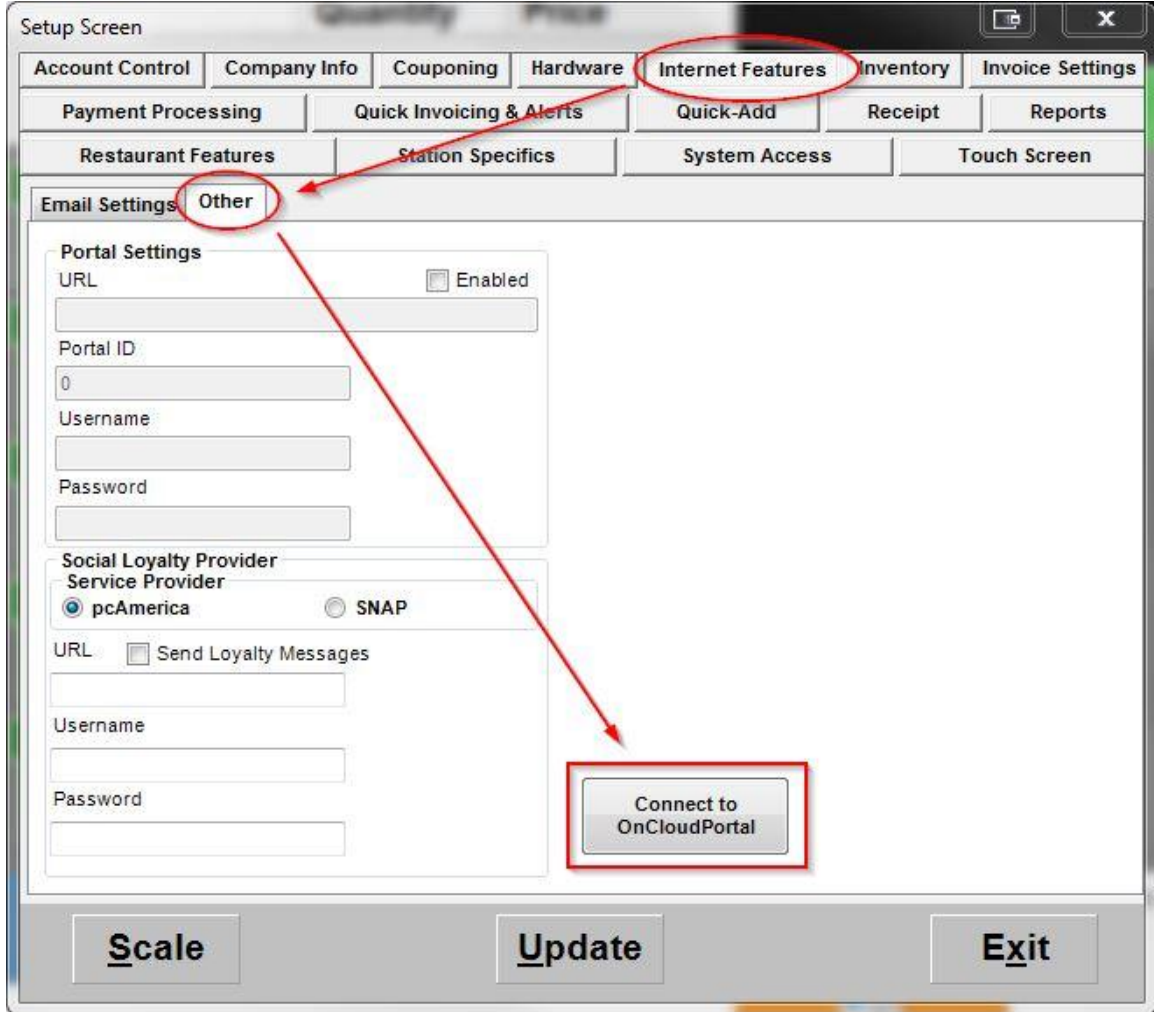
10. If you need to make any changes to your entries, you may do so by clicking on the Edit button. Note: the connected status will be set to No until we initialize a connection from within CRE/RPE.



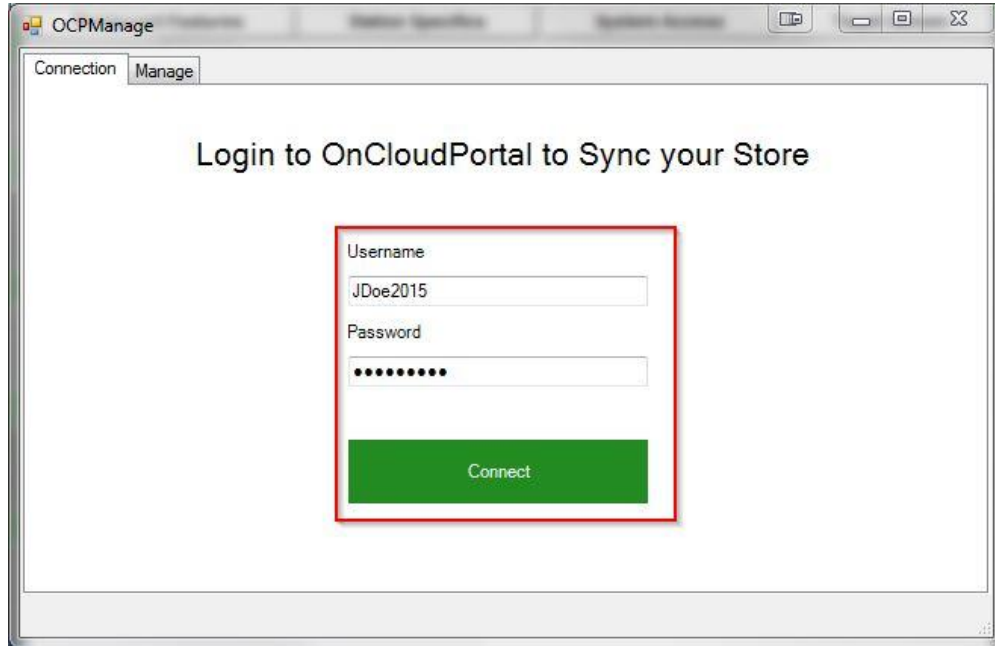
11. From within CRE/RPE, go to **Manager/Options > Setup > Setup Screen**.



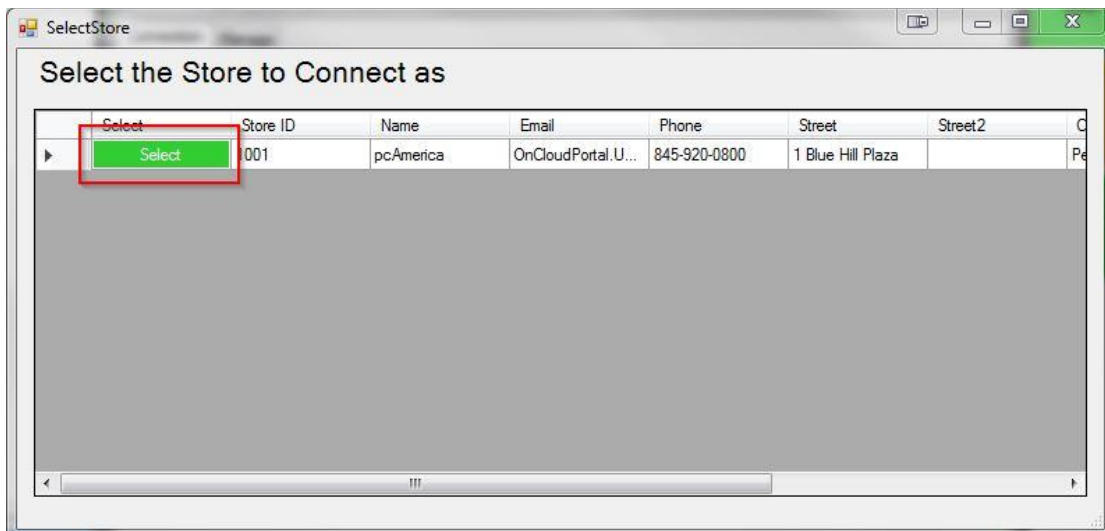
12. Click on **Internet Features > Other > Connect to OnCloudPortal**.



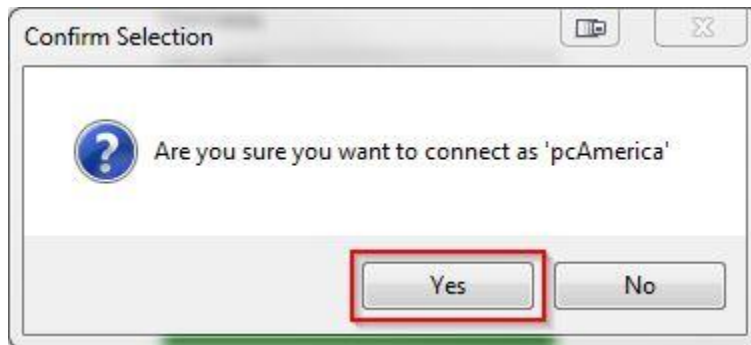
13. Under the Connection tab, enter the username and password you registered with the OCP.



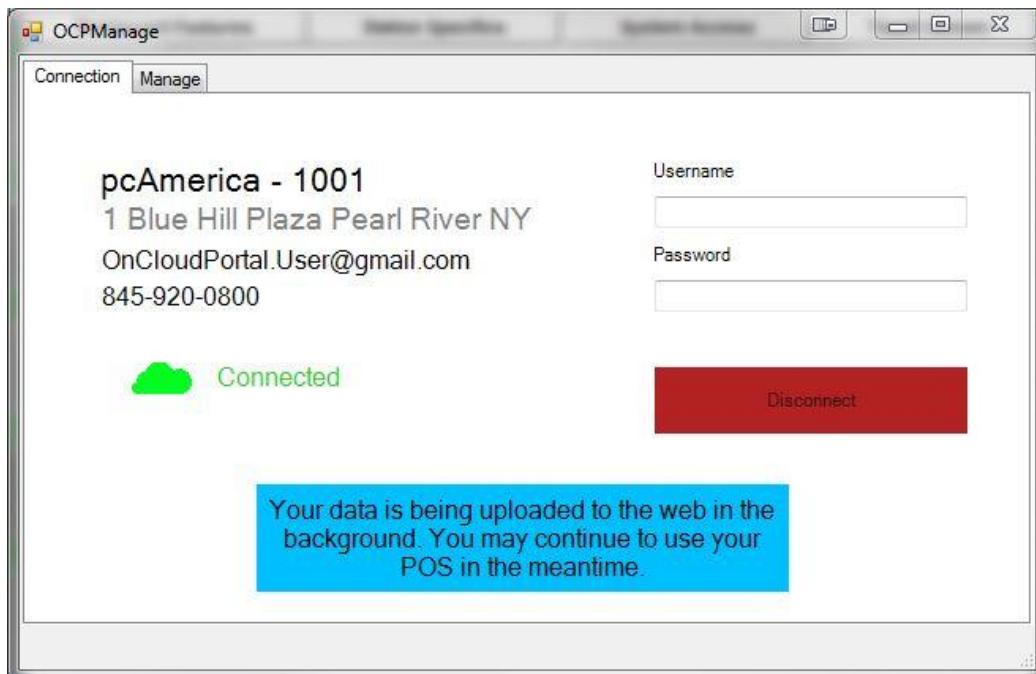
14. Click on the **Select** button.



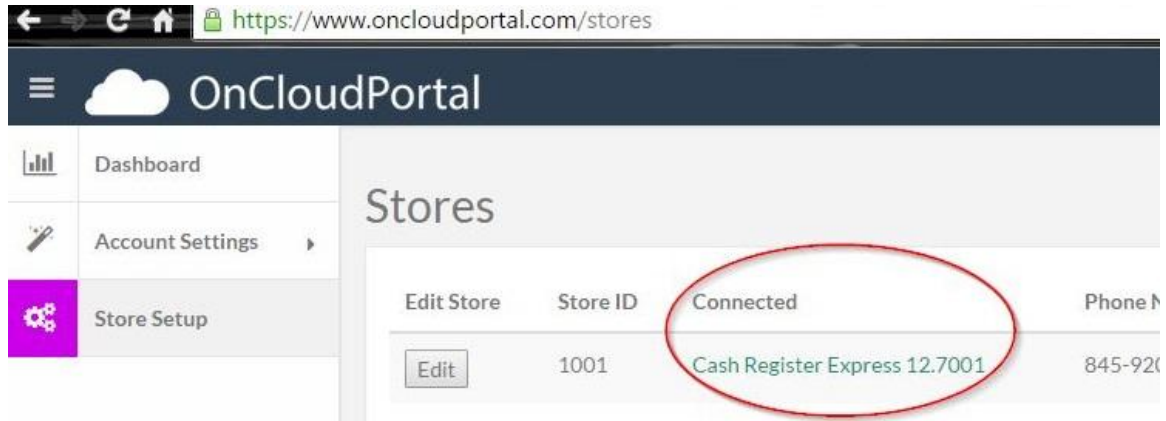
15. Click **Yes** at the Confirm Selection prompt.



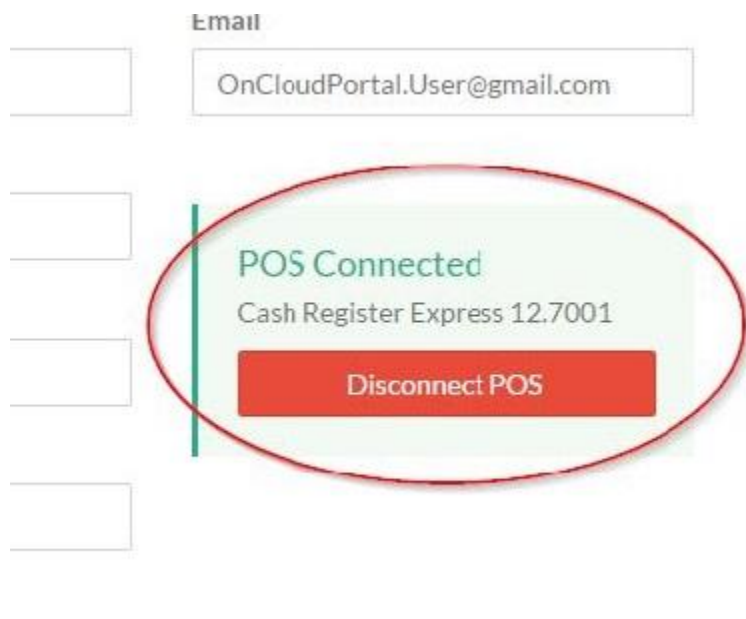
16. Wait for the screen below to appear. Note: to disconnect from the OCP you will need to enter your Username and Password again.



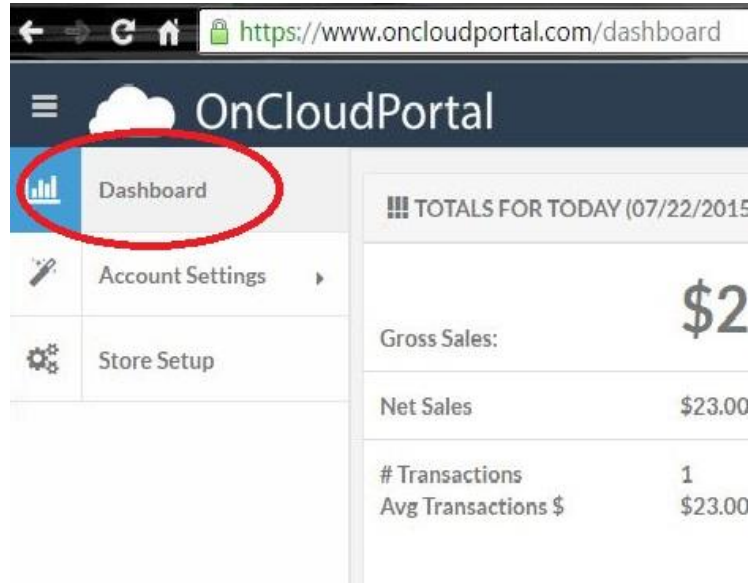
17. Go back to the OCP website and refresh your screen by hitting F5 on your keyboard, you should now see the store Connected status in green displaying CRE/RPE along with the version number.



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.



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.

