UniCLOUD
POS Management

APPENDIX TO THE QUICK GUIDE

Onboarding a client, click by click

Every task of the quick guide, in the order of the visit. Two platforms: your dealer platform (the administration console) and the clients' admin platform (UniCLOUD), where you sign in with your administrator credentials.

CONTENTS

A **Your dealer platform**

A1 Sign in to the dealer platform

A2 Create a client

A3 Add an establishment to a client

A4 Create credentials for the client

A5 Put a bridge box into service

B **The clients' admin platform**

B1 Sign in with your administrator credentials

B2 Open «Register screen» and choose the installation mode

C **The onboarding, step by step**

C1 Attach the bridge box

C2 Declare the registers

C3 Back up the registers

C4 Run the communication test

C5 Choose the reference register and settle the conflicts

C6 Confirm the onboarding and choose the business mode

C7 Send the program to the registers

D **Hand over to the merchant**

D1 Show the register screen

D2 The first day

D3 See UniCLOUD as the merchant does

E Afterwards, from the dealer platform

E1 Follow the onboardings

E2 Restore a register or download its snapshot

E3 Add a register later

F Without a bridge box: HX Cloud

F1 Enrol the register on HX Cloud

F2 What changes without a box

G Troubleshooting

G1 If something does not go as planned

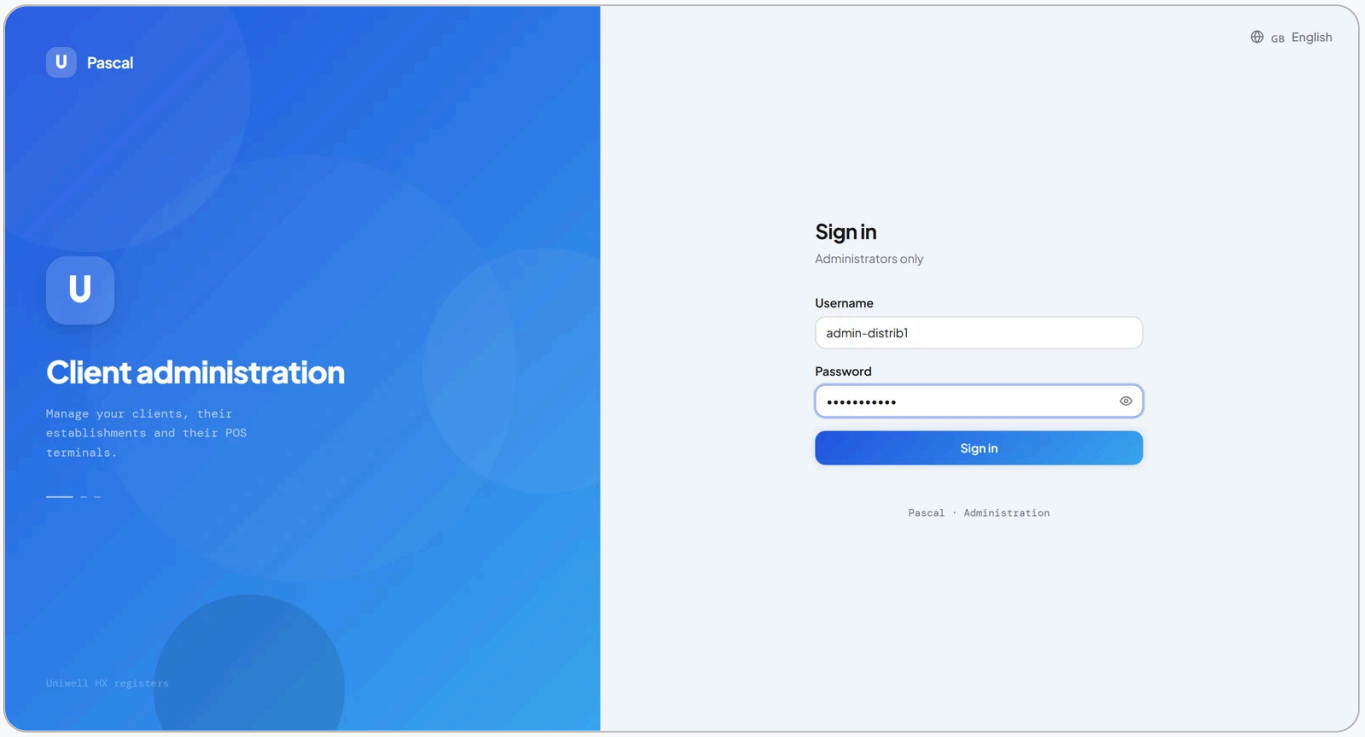
A Your dealer platform

The administration console of your distributor. Everything here can be done before the visit.

A1 Sign in to the dealer platform

1. Open your distributor's console address.
2. Type your administrator username (not an email) and your password.
3. Press **«Sign in»**.

> NOTE The language switch is at the top right.

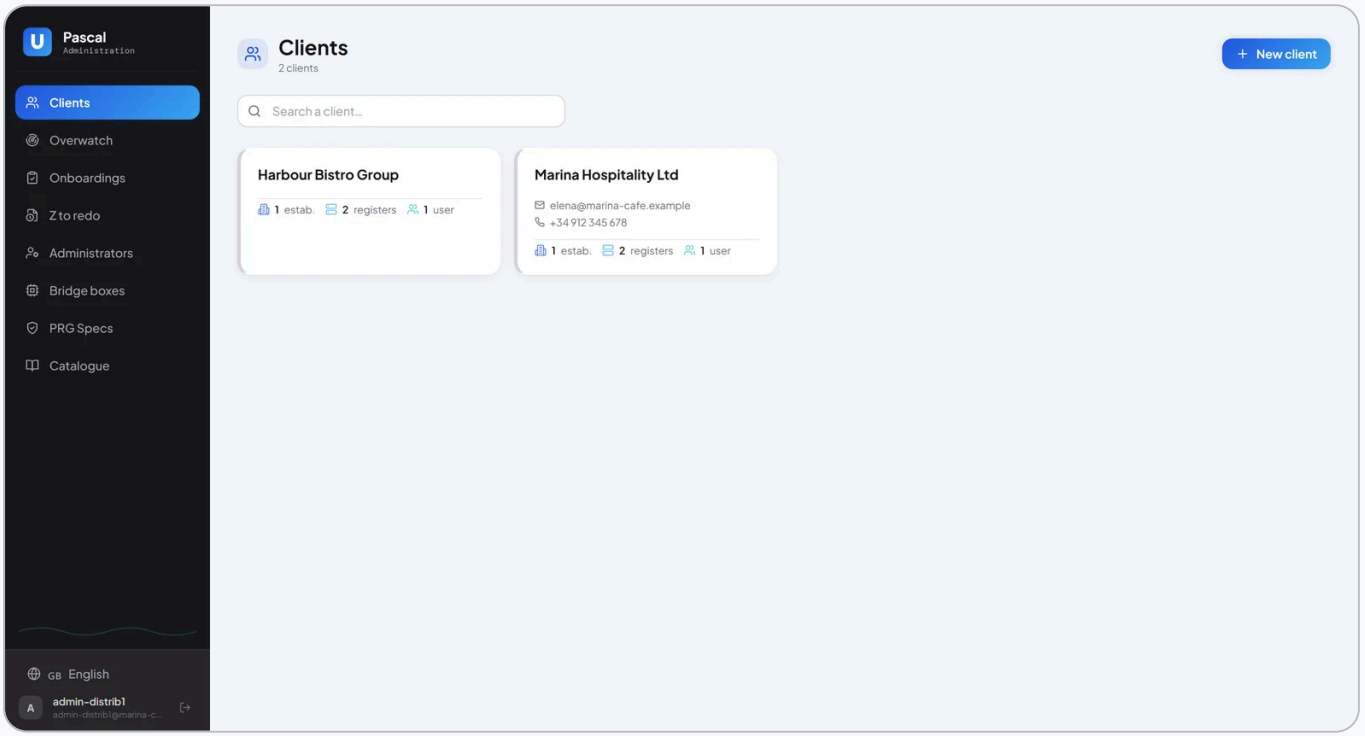


Screen · The console sign-in page

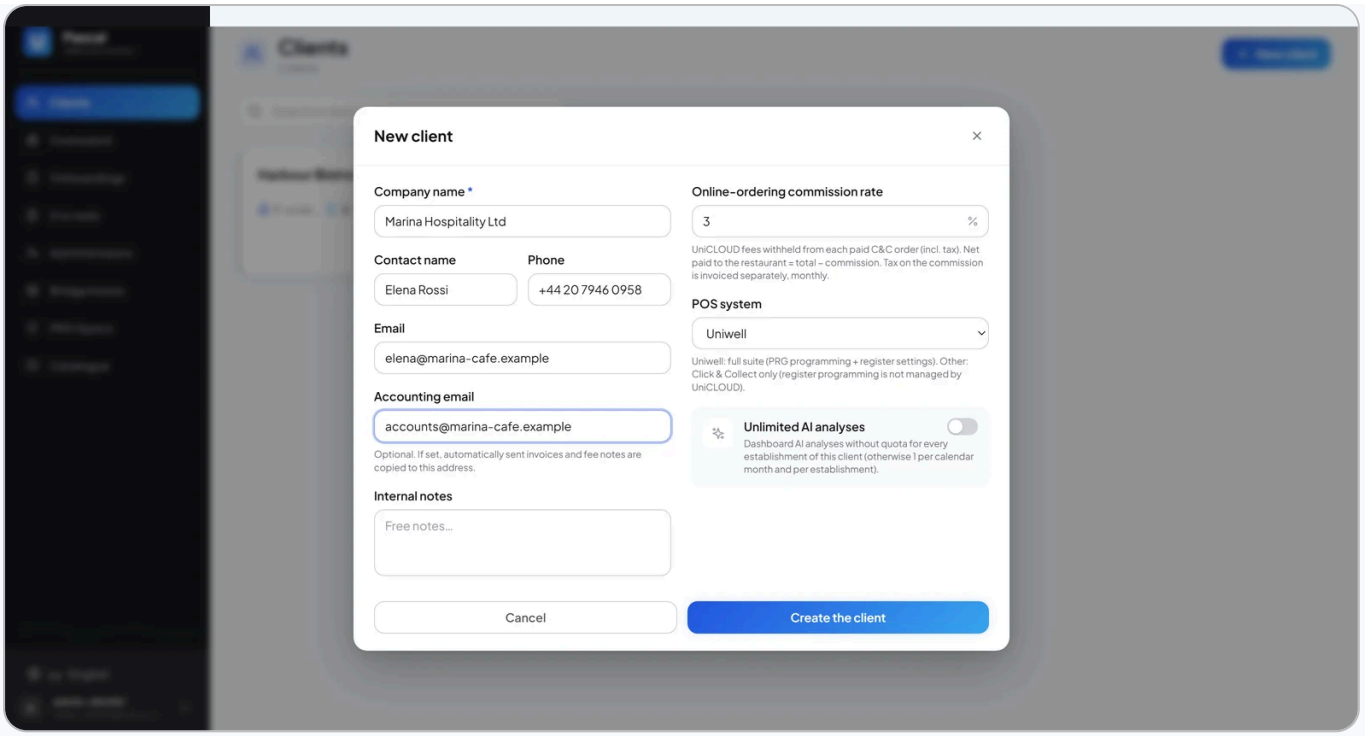
A2 Create a client

1. Open **«Clients»**.
2. If the client already exists, open its record from the list and go to A3. Otherwise press **«New client»**.
3. Fill in **«Company name»**, the only required field. **«Accounting email»** is optional: it receives a copy of the invoices and fee notes sent automatically.
4. Keep **«POS system»** on Uniwell: it unlocks the register programming.
5. Press **«Create the client»**.

> NOTE The client is the company: one client can own several establishments.



Screen · The Clients page

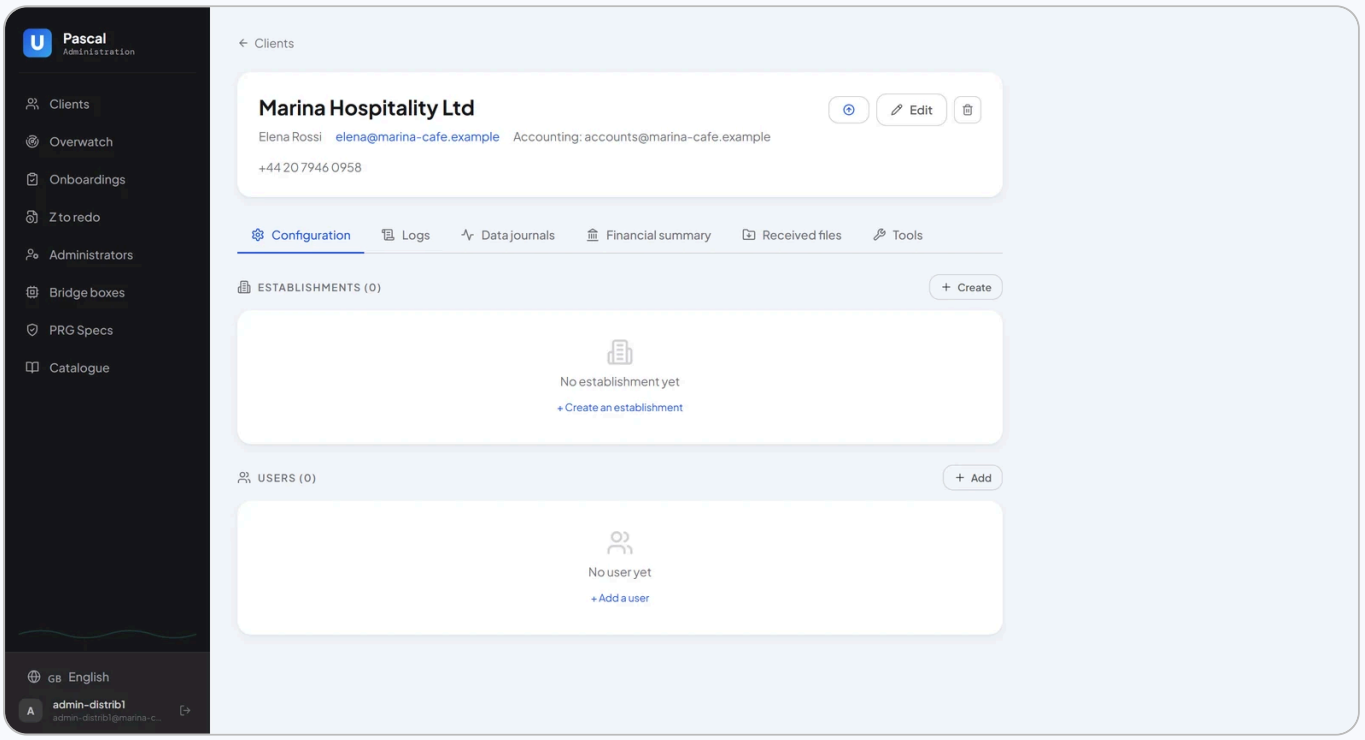


Screen · The new client form

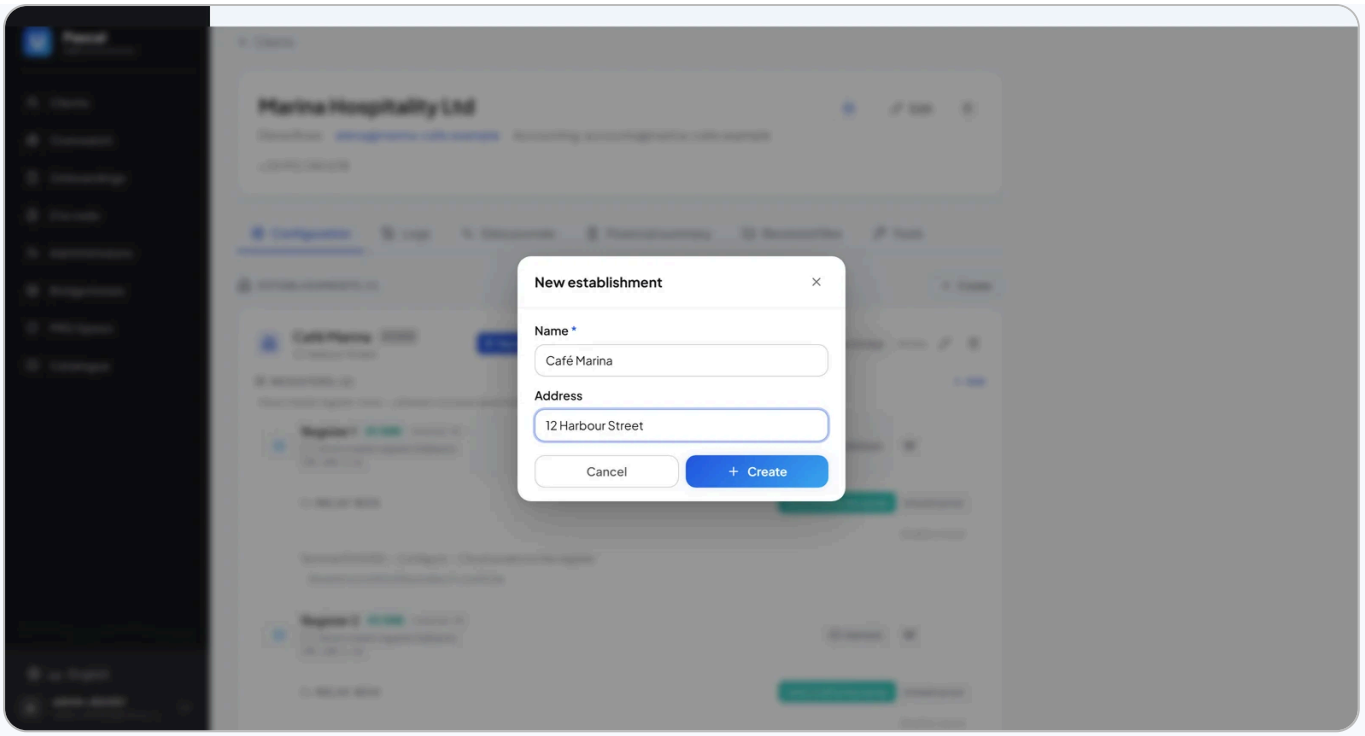
A3 Add an establishment to a client

1. Open the client record: it lists its establishments and users.
2. Press **«Create»** in the Establishments section.
3. Type the name the merchant uses and, if you have it, the address.
4. Press **«Create»**.
5. On the establishment card, check the business type: Restaurant, Grocery or Hybrid. Leave **«With bridge»** as it is: the onboarding sets it on site. **«Attach»** is only for attaching a box outside the onboarding.

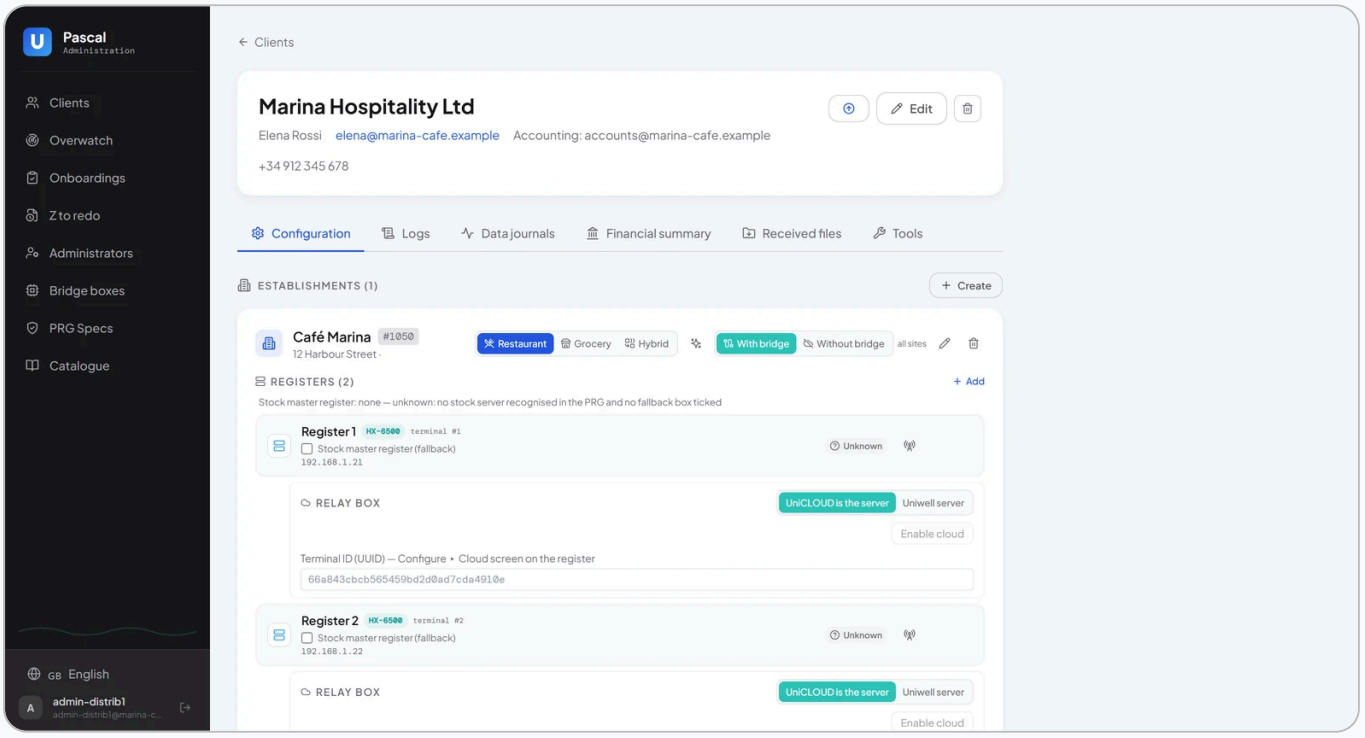
> NOTE One establishment per shop or restaurant.



Screen · The client record



Screen · The new establishment dialog

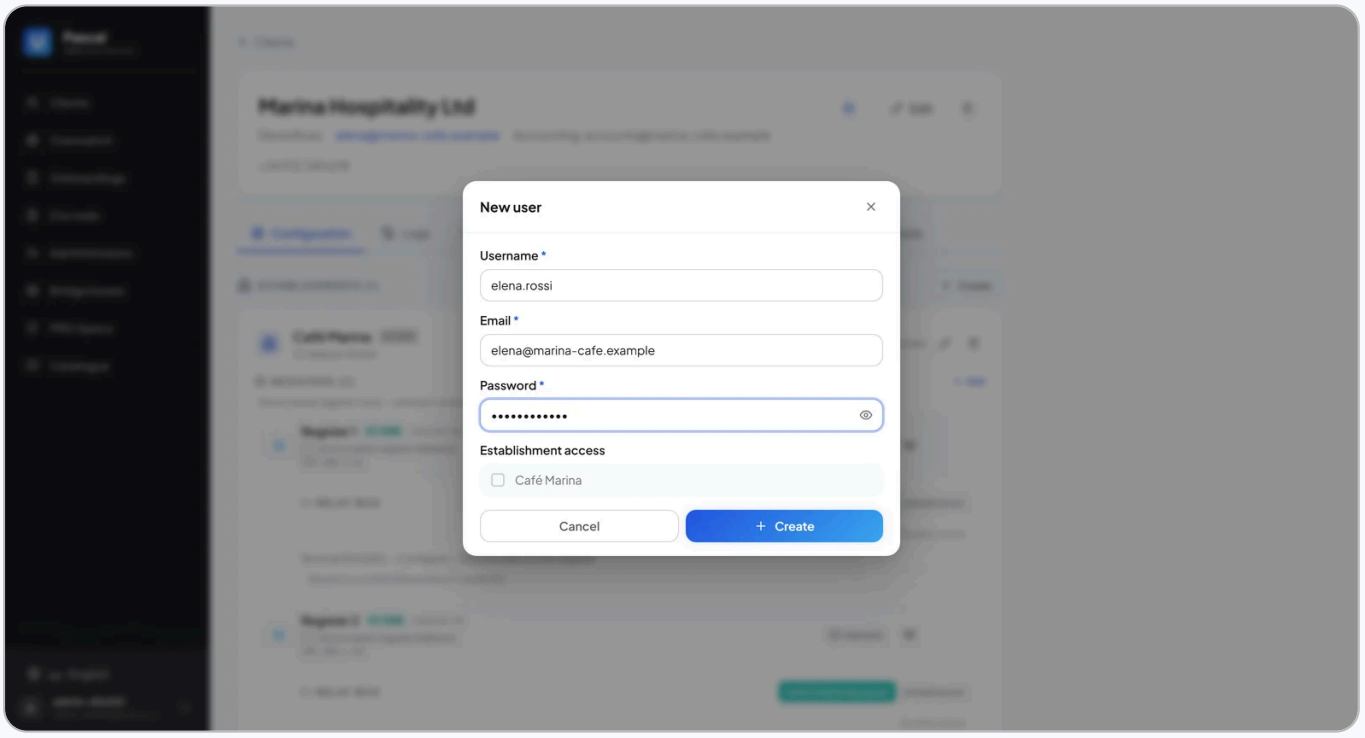


Screen · The establishment card

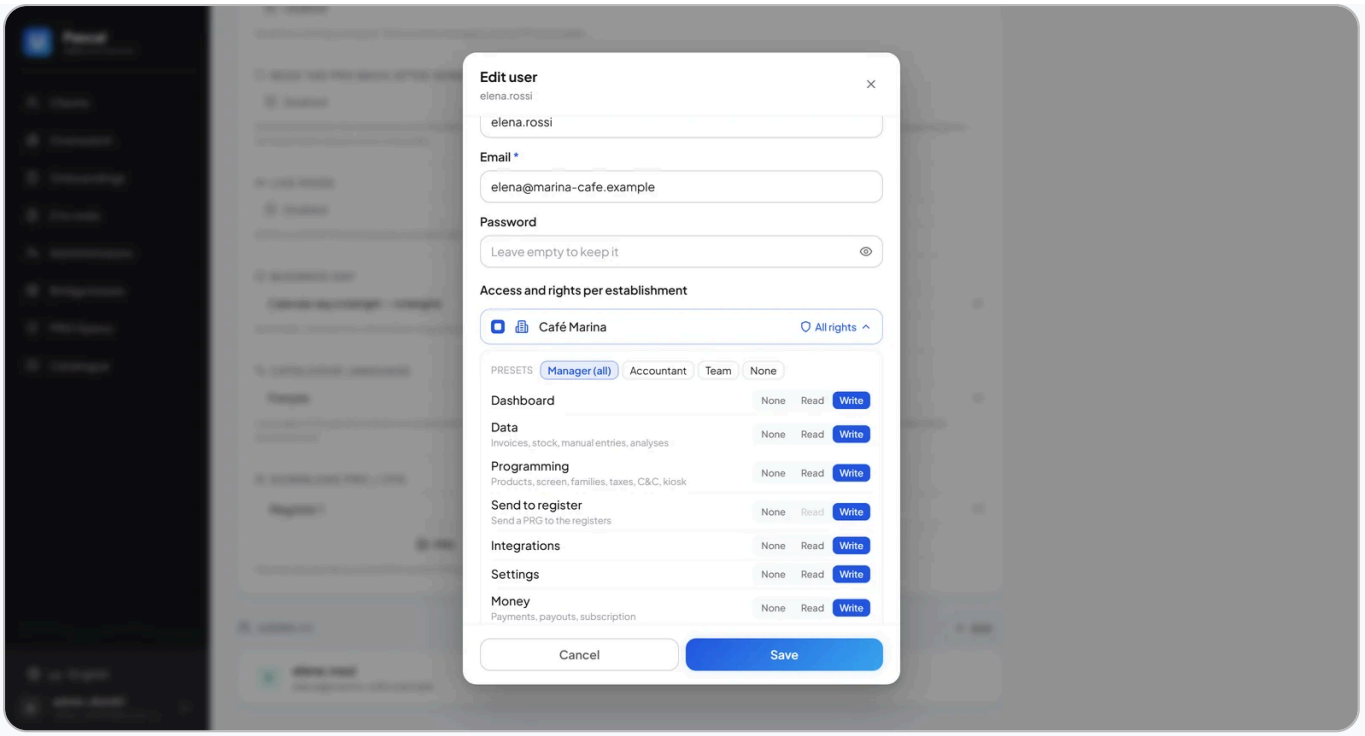
A4 Create credentials for the client

1. In the Users section of the client record, press **«Add»**.
2. Type a username, an email and a password. The merchant signs in with the username, not the email.
3. Press **«Create»**.
4. Edit the user and tick the establishment.
5. Pick a preset: **«Manager (all)»** for the owner, **«Accountant»** or **«Team»** for the others.
6. Press **«Save»**.

> NOTE Rights are per establishment and per area (Data, Programming, Send to register, Settings...). They can be refined later.



Screen · The new user dialog

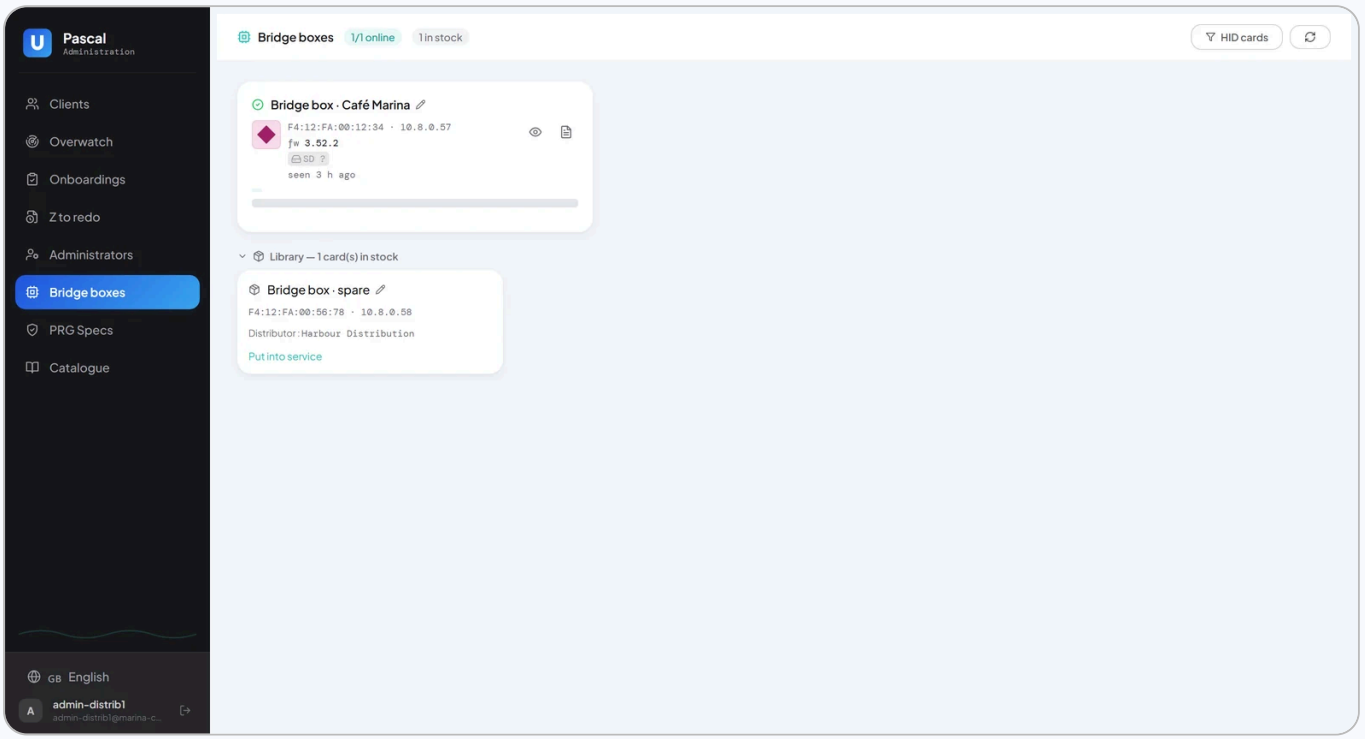


Screen · The rights editor

A5 Put a bridge box into service

1. Open **«Bridge boxes»**.
2. Press **«Put into service»** on a box of the **«Library»**: it becomes available to the onboarding.

> NOTE Boxes are provisioned by UniCLOUD for your distributor. Once attached to an establishment, the box shows online with its firmware.



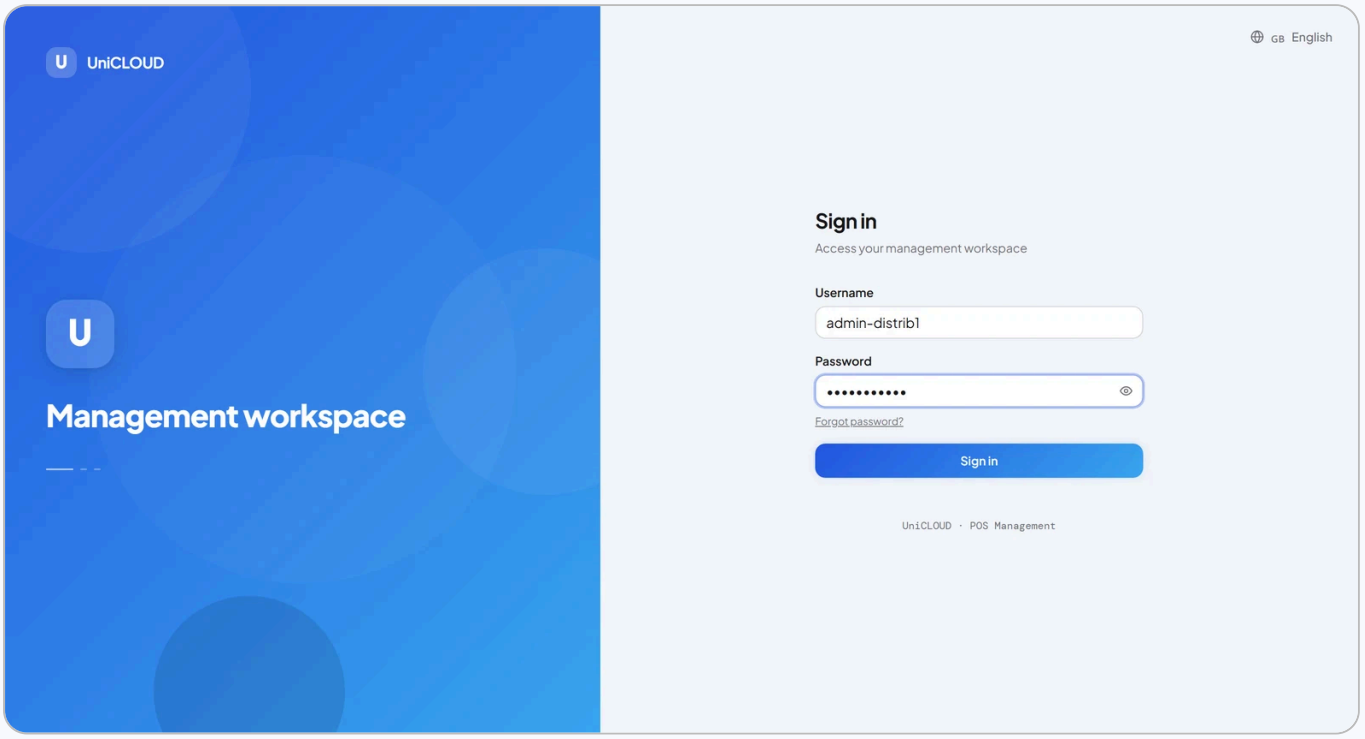
Screen · The Bridge boxes page: one box in service, one in the library

B The clients’ admin platform

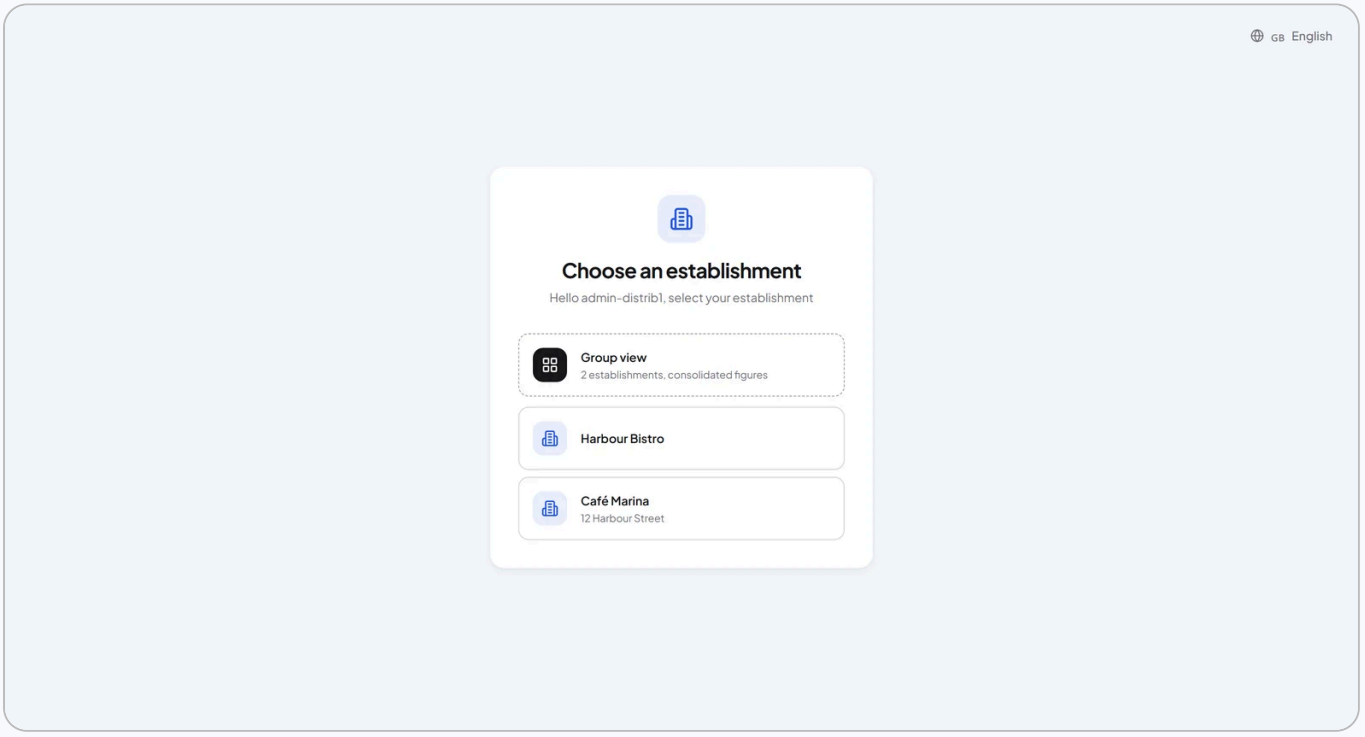
UniCLOUD, the platform your clients will use. The onboarding is run from here, with your administrator credentials.

B1 Sign in with your administrator credentials

1. Open your distributor's UniCLOUD address.
2. Type your administrator username and your password, then press **«Sign in»**. The onboarding is reserved for administrators.
3. Choose the establishment you created in the console.



Screen · The UniCLOUD sign-in page

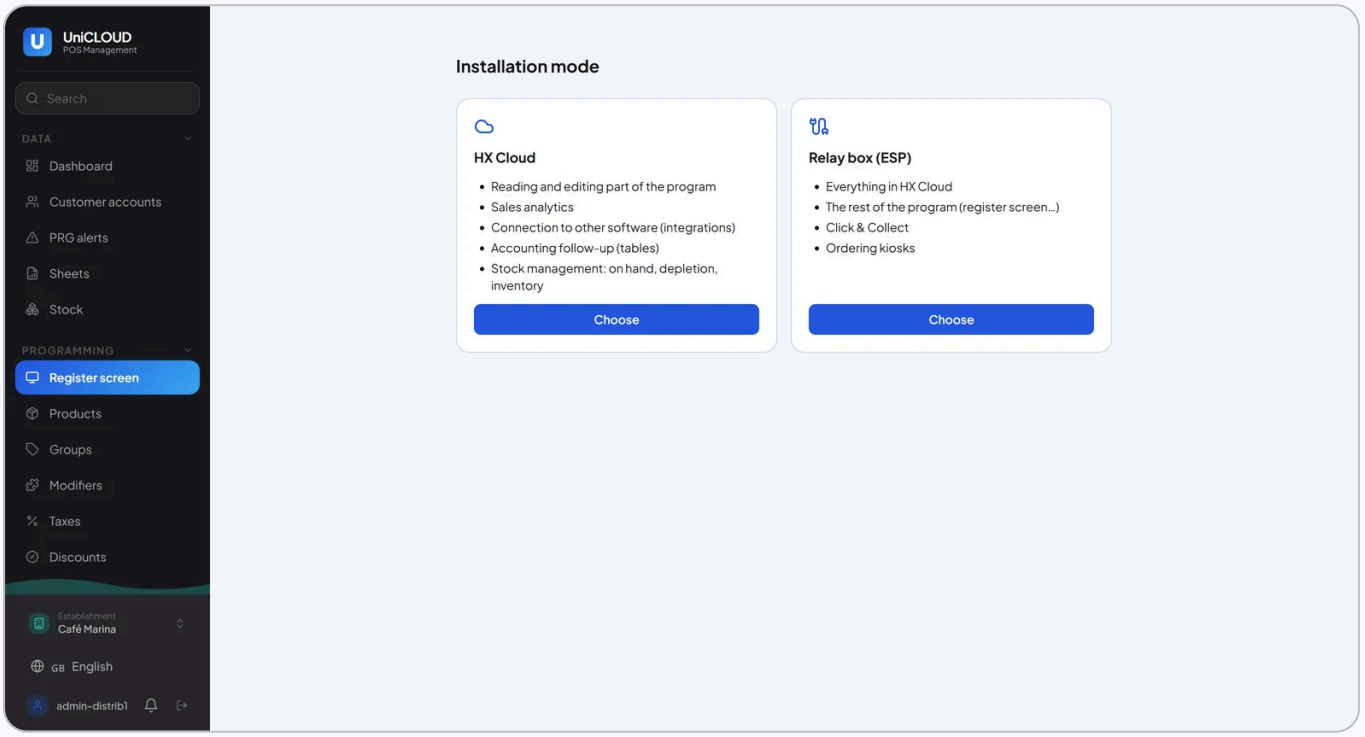


Screen · The establishment picker

B2 Open «Register screen» and choose the installation mode

1. Under Programming, open **«Register screen»**. The onboarding opens there as long as the establishment has no program yet.
2. Press **«Choose»** under **«Relay box (ESP)»**: that is the bridge box, which the screen also calls **«Relay card»**. **«HX Cloud»** is the variant without a box (section F).
3. Follow the steps on screen (section C).

> NOTE If the onboarding does not open: the account is not an administrator, or the establishment already has a program.



Screen · The installation mode

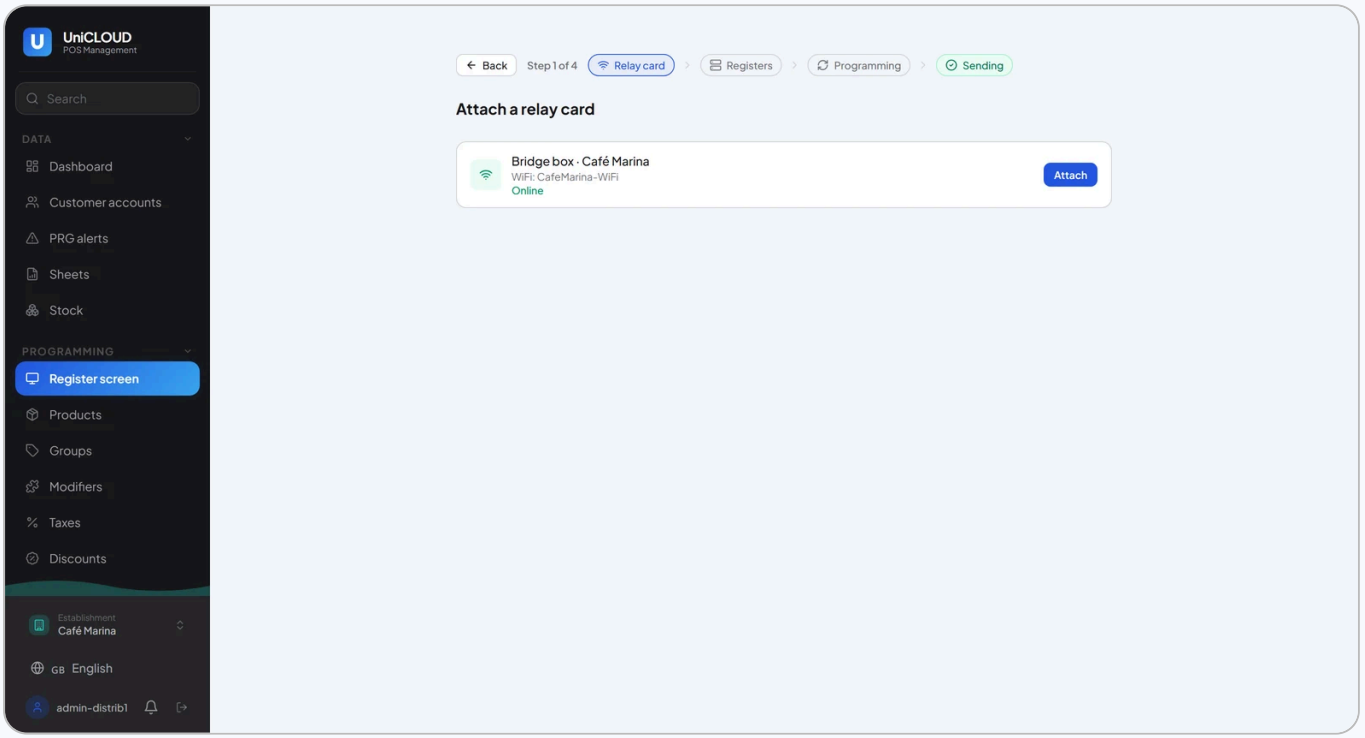
C The onboarding, step by step

Bridge box path. The screen numbers the steps itself; here is what you do at each one.

C1 Attach the bridge box

1. Plug in the box: power and the shop's network.
2. Wait until it appears in the list, online, with its Wi-Fi name.
3. Check it is the box you put into service for this establishment, then press **«Attach»**.

> NOTE **«No relay card found»**: have a box put into service for your distributor (A5).
> **«Service unreachable»**: try again in a moment.

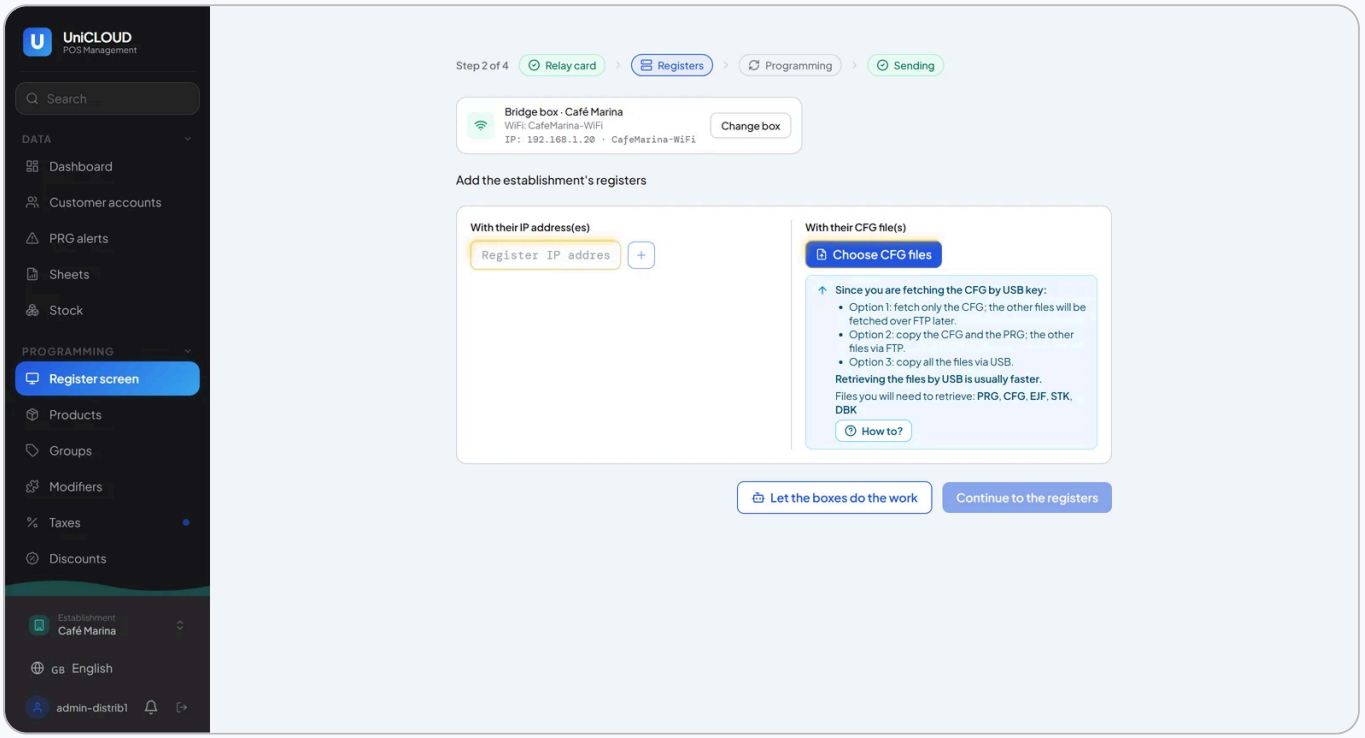


Screen · Attach the bridge box

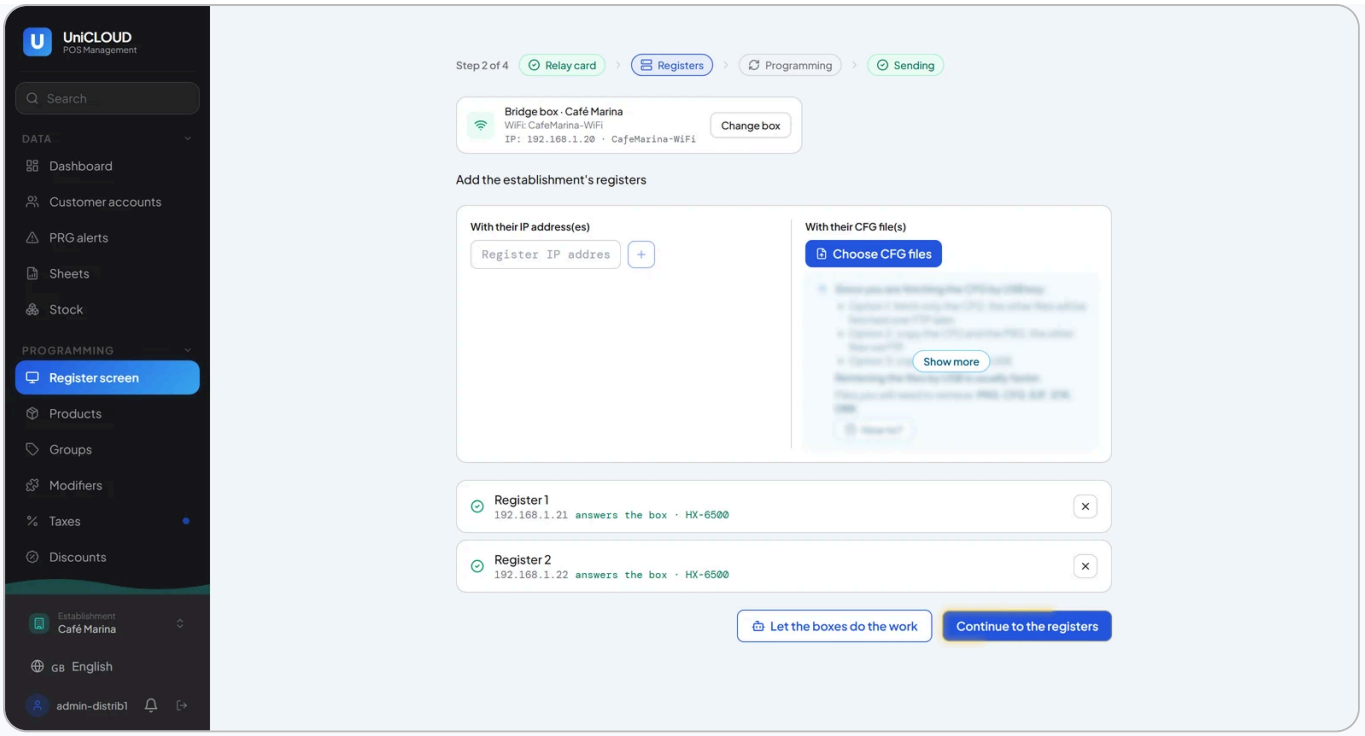
C2 Declare the registers

1. Check the box card: name, Wi-Fi, IP address.
2. For each register, type its IP address. Or press **«Choose CFG files»** to upload its CFG file from a USB key (several at once).
3. Wait until every register reads **«answers the box»** with its model.
4. Press **«Continue to the registers»**.

> NOTE A red line means the box cannot reach the register: check the IP address, the FTP server and that the register shows its sales screen.



Screen · The box card and the register declaration



Screen · Every register answers the box

If you use a USB key: export the files from the register

Only for a register the box cannot reach, or if you prefer to carry the files. **«How to?»** shows the same keys with photos. The export writes all the files to the key in one operation.

On the register

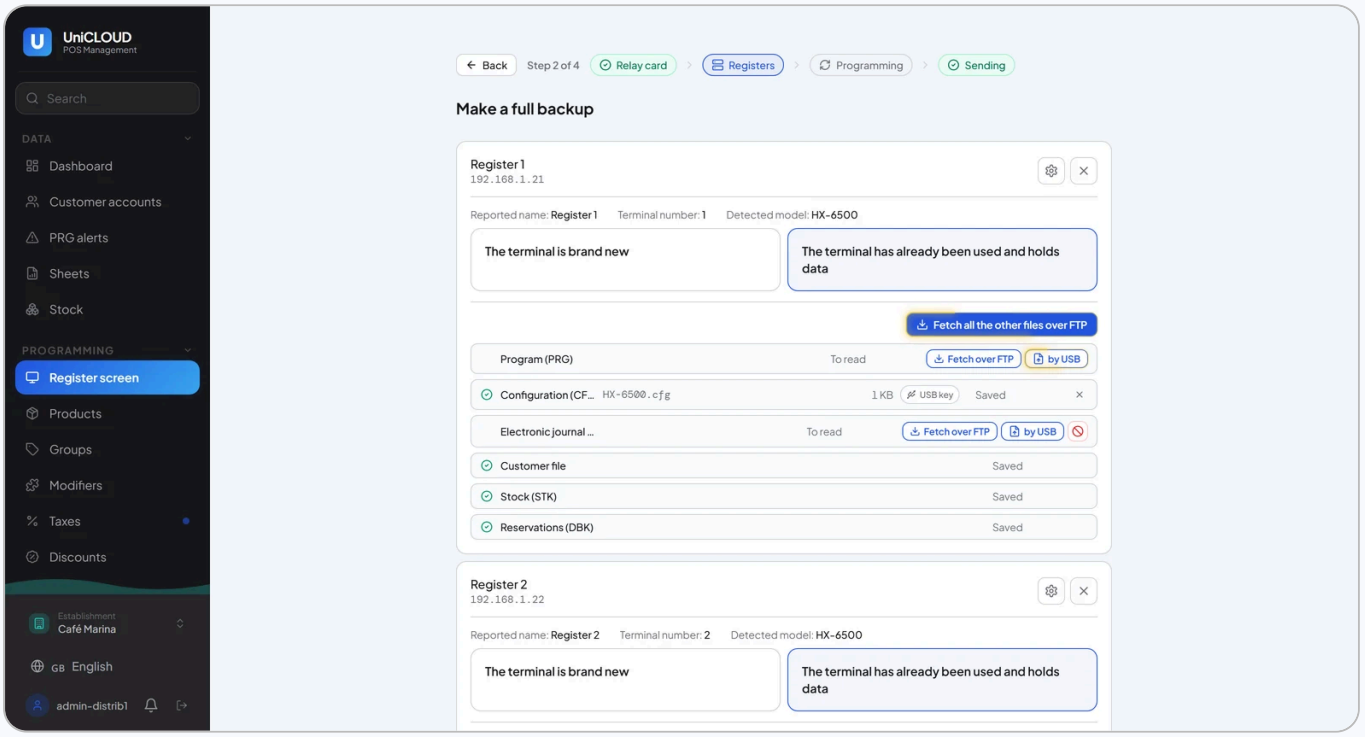
1. From the main menu, open **«Program»**.
2. Open **«Others»**.
3. Press **«Report Push Up»**.
4. In the left list, pick a push up that is not defined yet and give it a name.
5. Add the reports to export, in order: **«Load/Save USB»** (Program File), **«Stock»** (Stock Quantity Backup), **«Reservations»** (Deposit Book Data Backup), **«Electronic journal»** (EJF), then **«Load/Save USB»** again (Configure File).
6. Tick **«Push up via USB»**, then OK.
7. **«Exit»**, back to the main menu.
8. From the main menu, press **«Report Push Up»**.
9. Press the push up you just created.
10. Press **«Push Up Start»**: the files are written to the key.

NOTE Keep one folder per register on the key: the register names its own files (HX-6500.prg, HX-6500.cfg…).

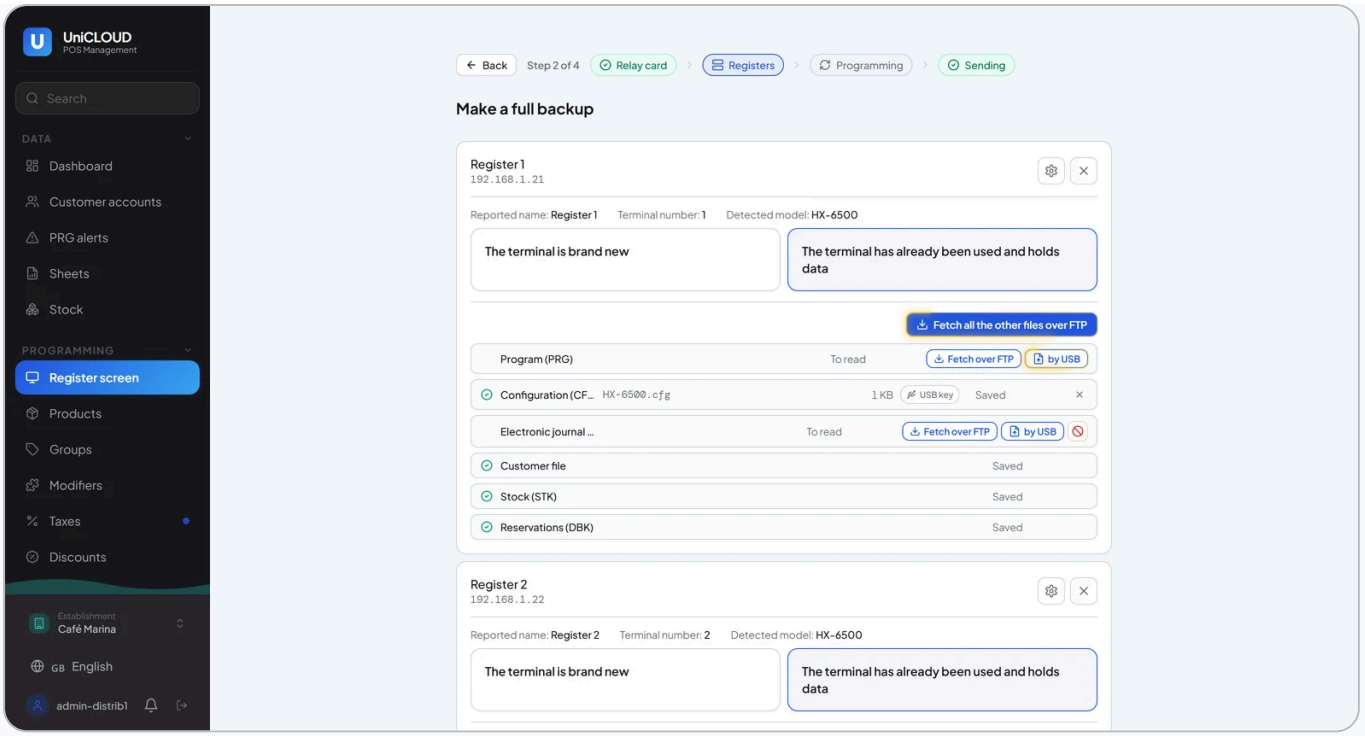
C3 Back up the registers

1. For each register, say whether it is brand new or **«has already been used and holds data»**.
2. For a used register, press **«Fetch all the other files over FTP»**: the box reads the program (PRG), the configuration (CFG), the journal and the other files. Any file can also be uploaded **«by USB»**.
3. Wait for **«Original snapshot taken»**. A file that does not exist on the register is marked **«Not present»**.
4. Repeat for each register, then press **«Continue to the communication test»** at the bottom of the page.

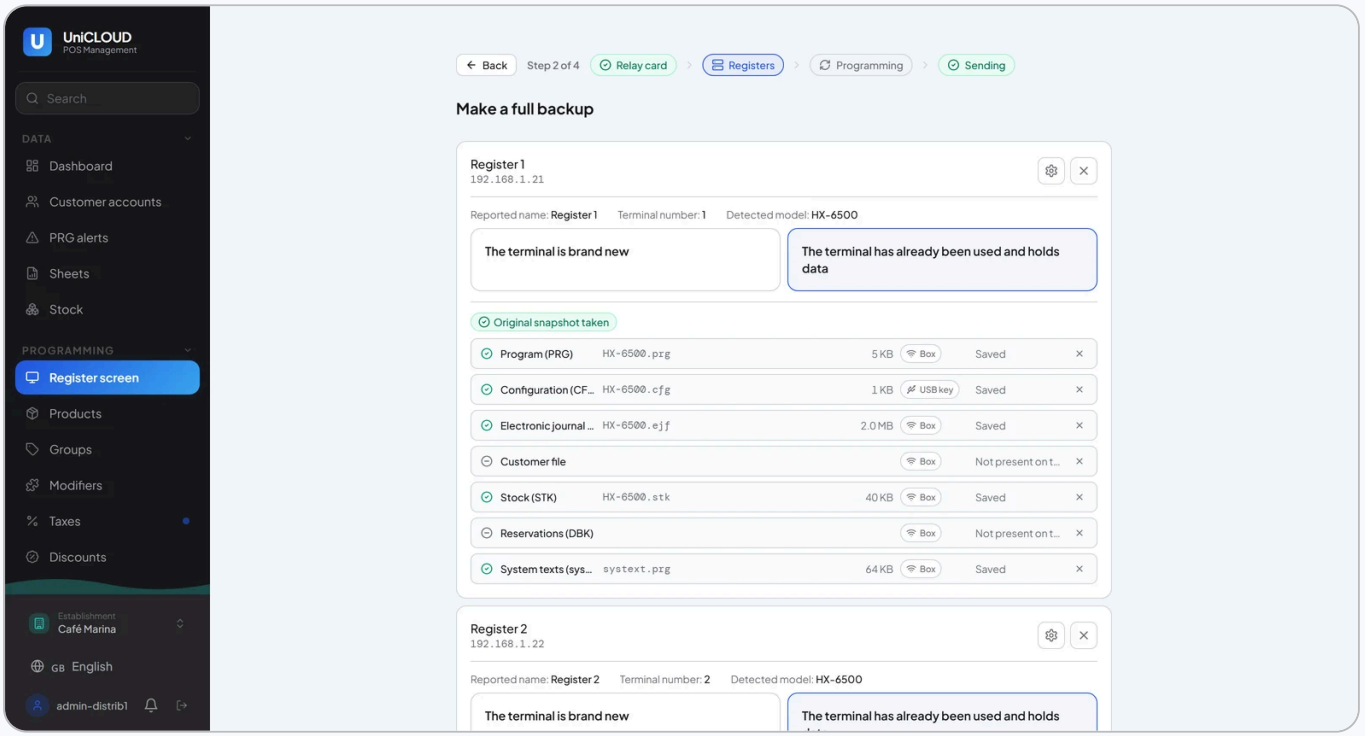
> NOTE The snapshot is kept for 30 days: the register can be restored from the console (E2).



Screen · New or used register



Screen · The snapshot card before fetching

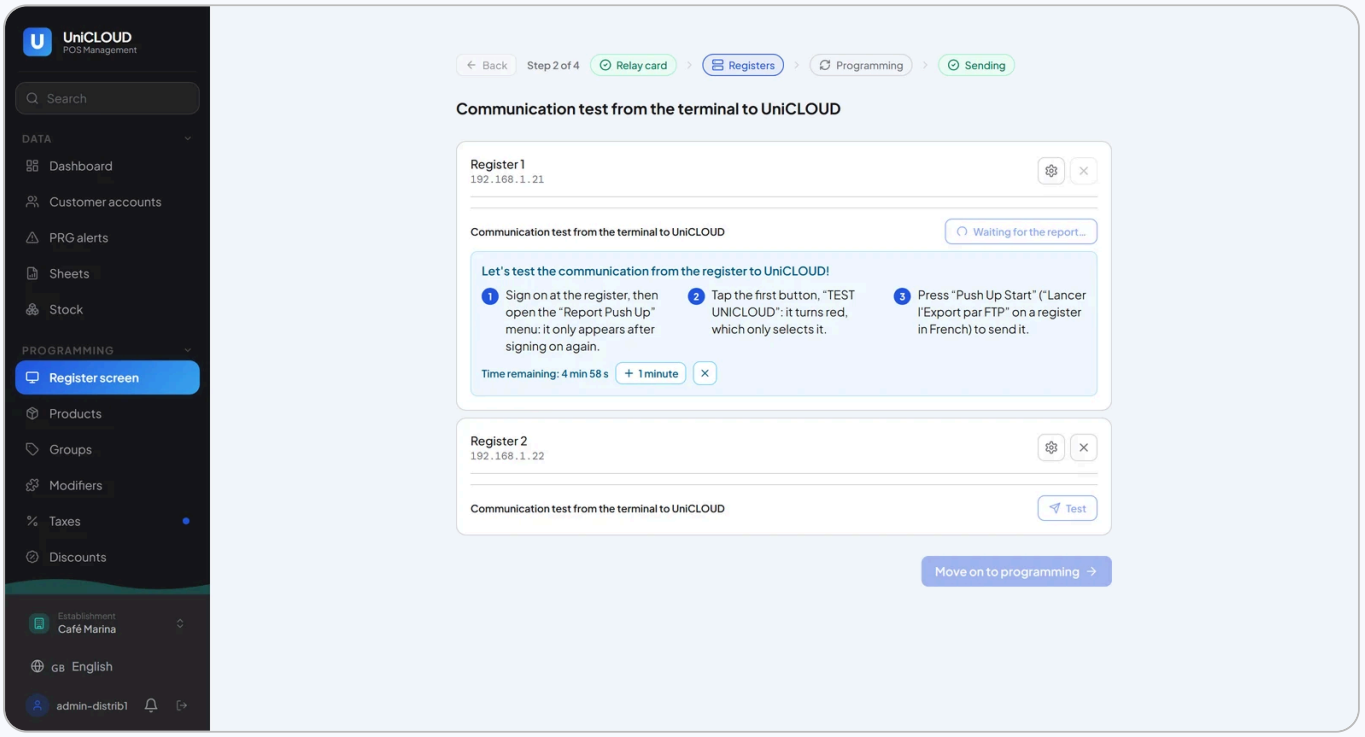


Screen · Snapshot taken

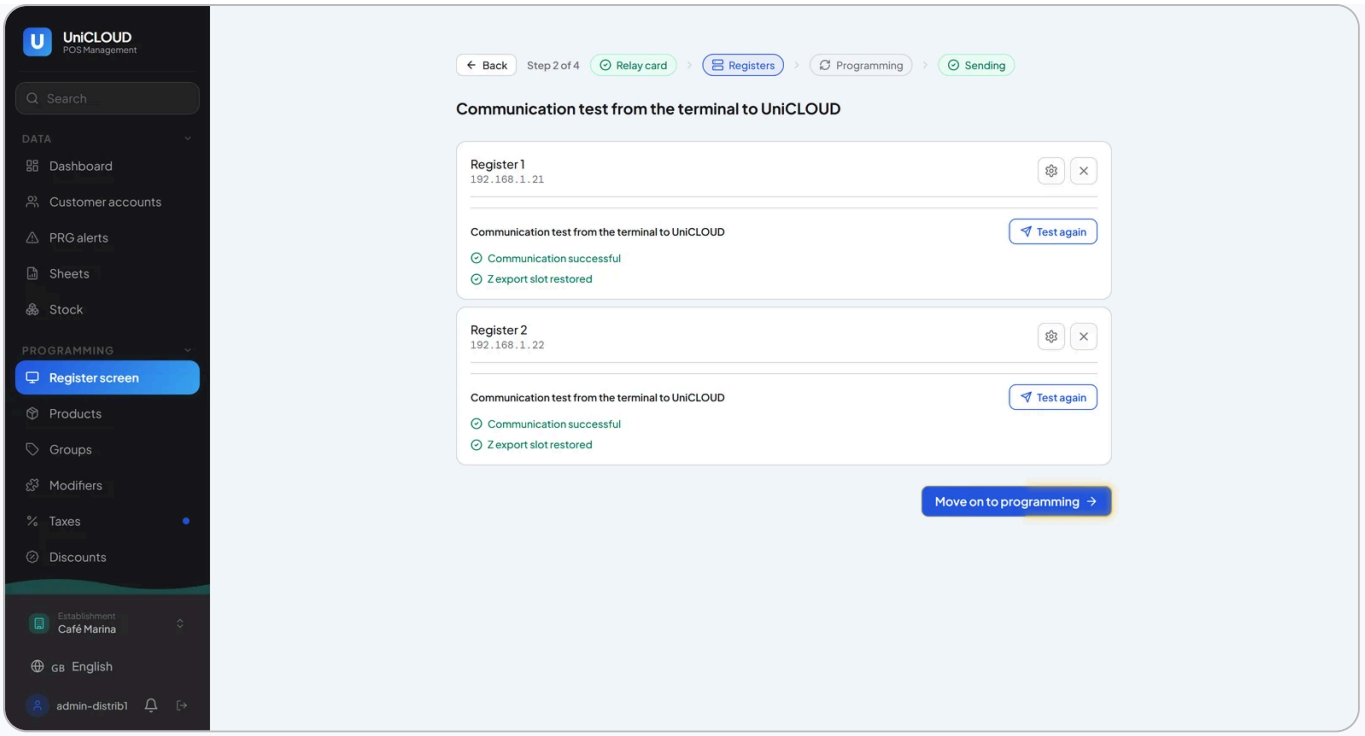
C4 Run the communication test

1. The test starts by itself for the first register: UniCLOUD prepares a test report on it and waits.
2. On the register: sign on, then open **«Report Push Up»**.
3. Tap the first button, **«TEST UNICLOUD»**.
4. Press **«Push Up Start»** to send the report.
5. Wait for **«Communication successful»** and **«Z export slot restored»** on the register's line.
6. Press **«Test»** on the next register, then **«Move on to programming»**.

> NOTE The countdown gives five minutes; **«+ 1 minute»** extends it. If the menu does not show, sign off and on again. If the test times out: register on its sales screen, box online, then **«Test again»**.



Screen · Waiting for the register's report

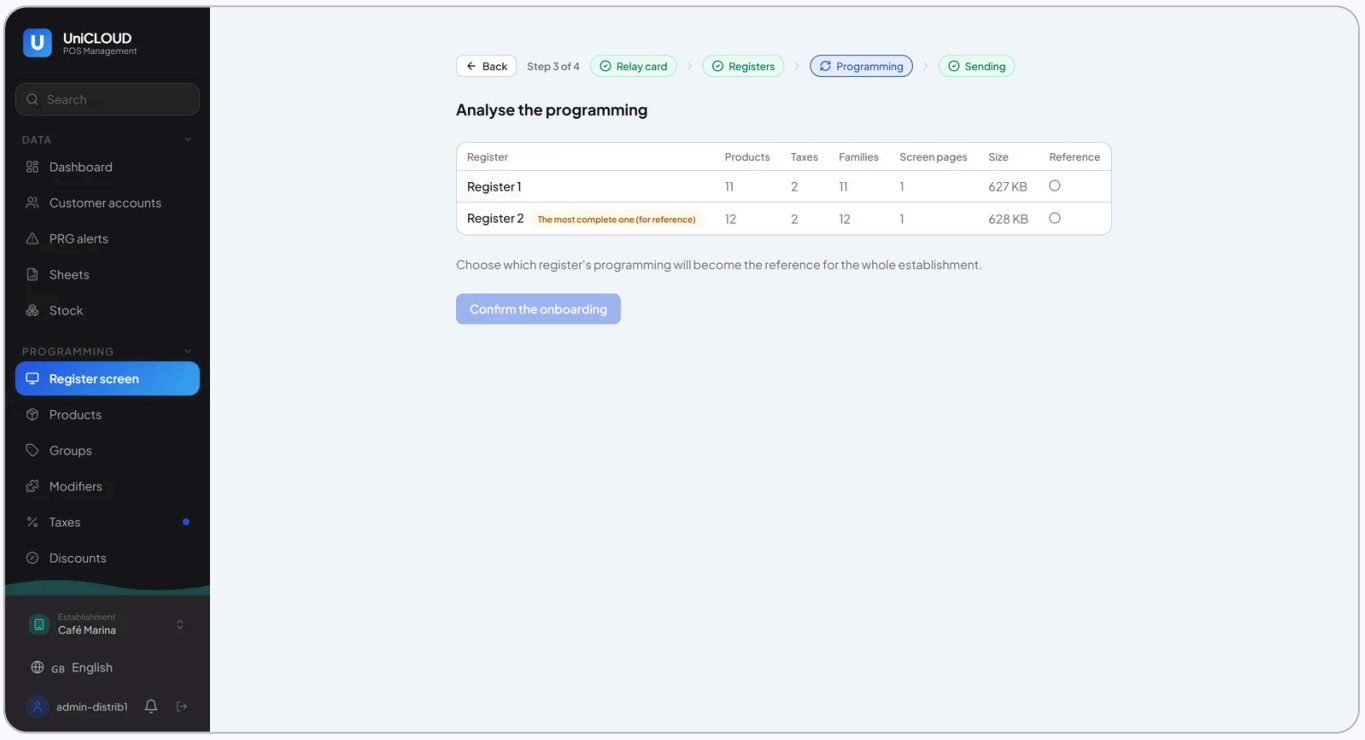


Screen · Both registers tested

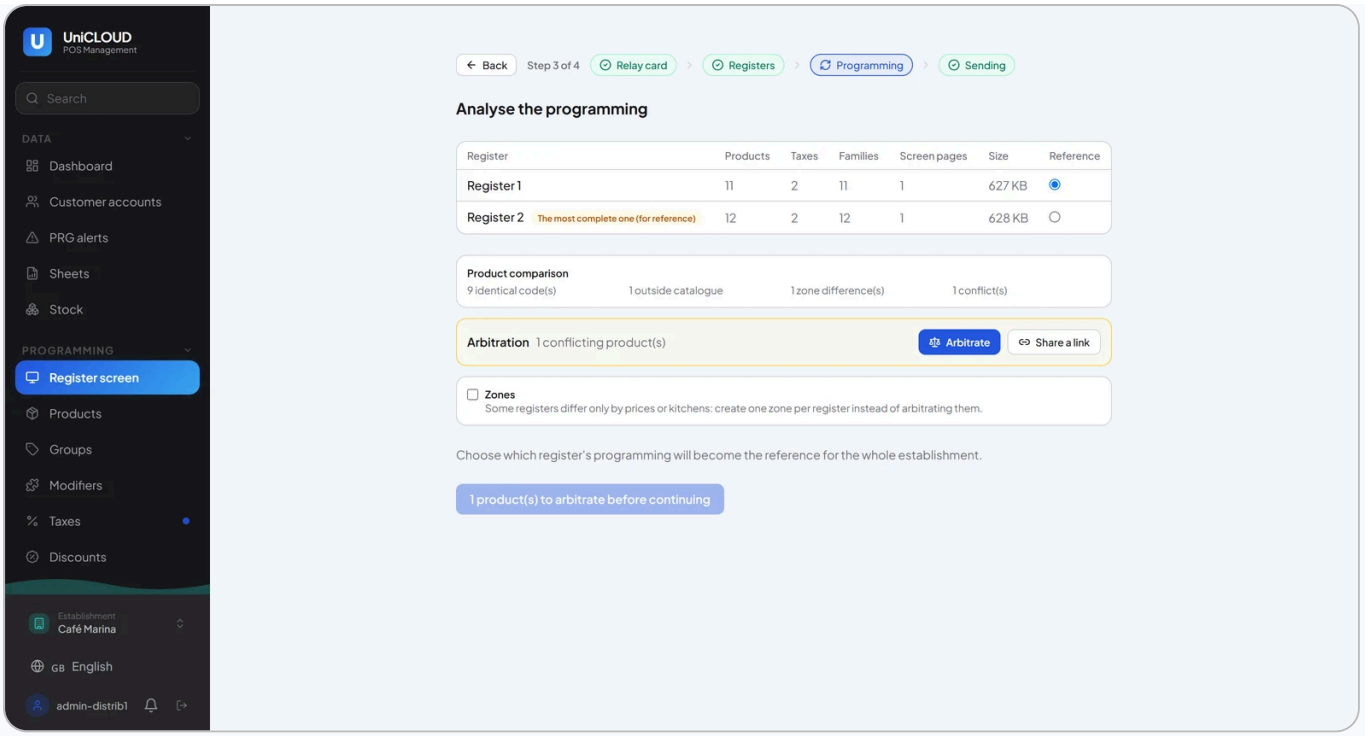
C5 Choose the reference register and settle the conflicts

1. Tick the **«Reference»** register, even when the programs look identical: its program becomes the establishment's. The register flagged **«The most complete one»** is the usual choice.
2. Read the comparison: identical codes, products on one register only (**«outside catalogue»**), zone differences (same product, other price or kitchen) and conflicts (same code, different product).
3. Press **«Arbitrate»**: one card per conflicting product, one column per register. Keep one register's version (**«Keep Register 1's»**) or **«Keep both»**, which gives the second product a new code. Keys 1 to 9 keep that register's version, 0 keeps both, arrows navigate.
4. Or press **«Share a link»**: type a password (6 characters minimum) and press **«Create the link»**. The merchant opens the link on any device and settles the conflicts; the screen follows live.

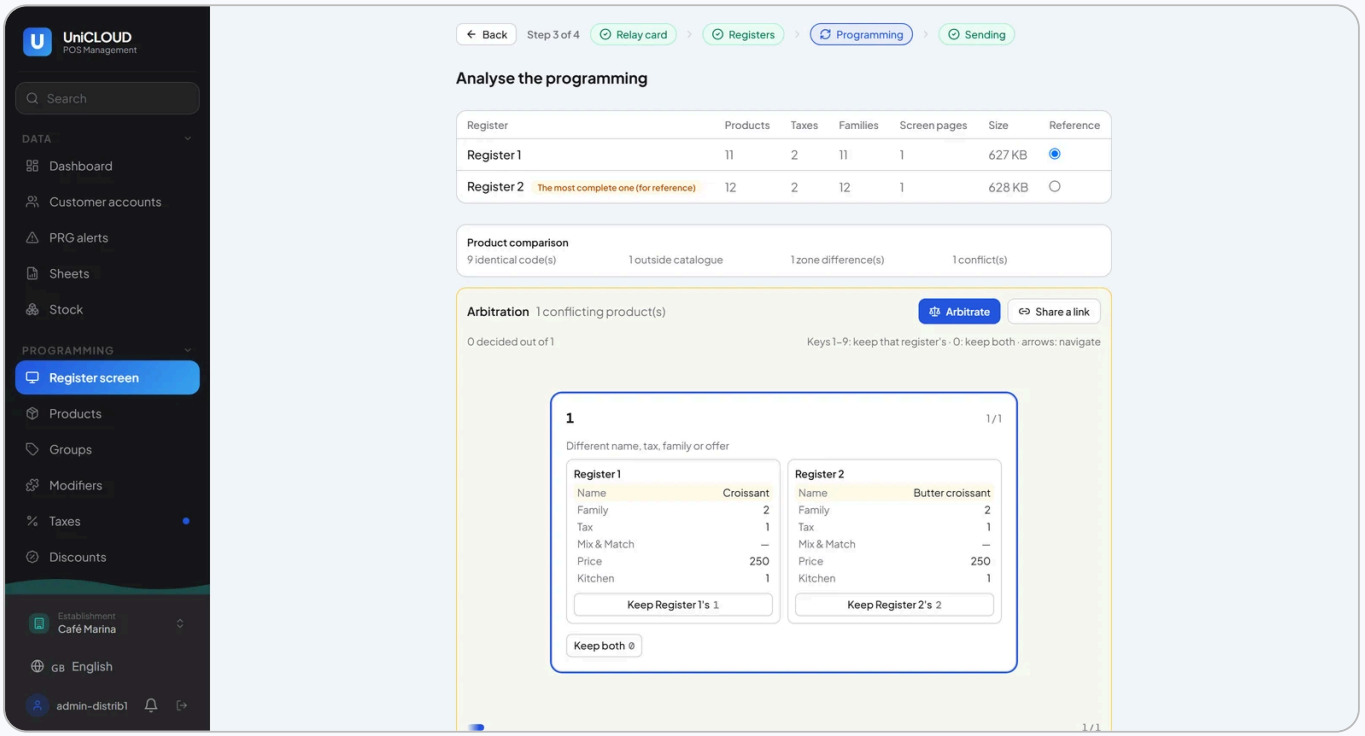
> NOTE **«Zones»** keeps one price list per register.



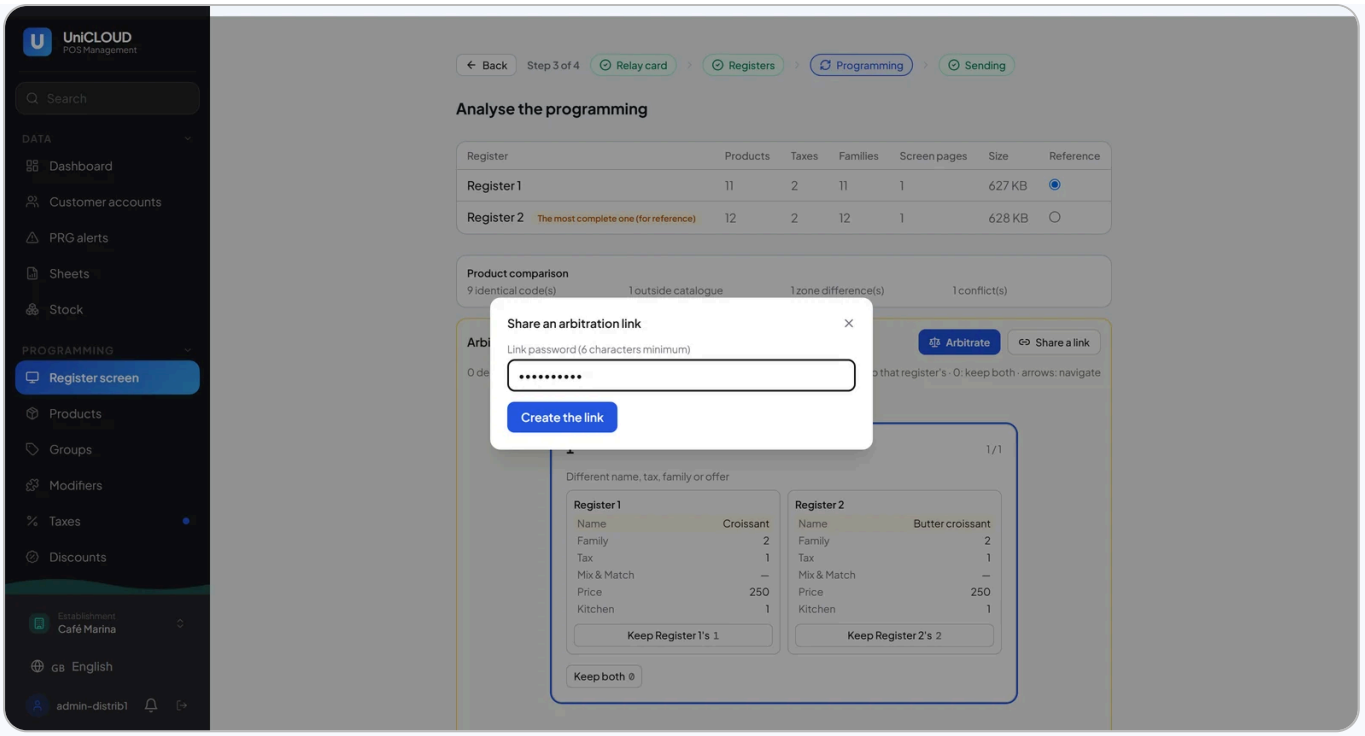
Screen · The programming analysis



Screen · The product comparison



Screen · One card per conflict

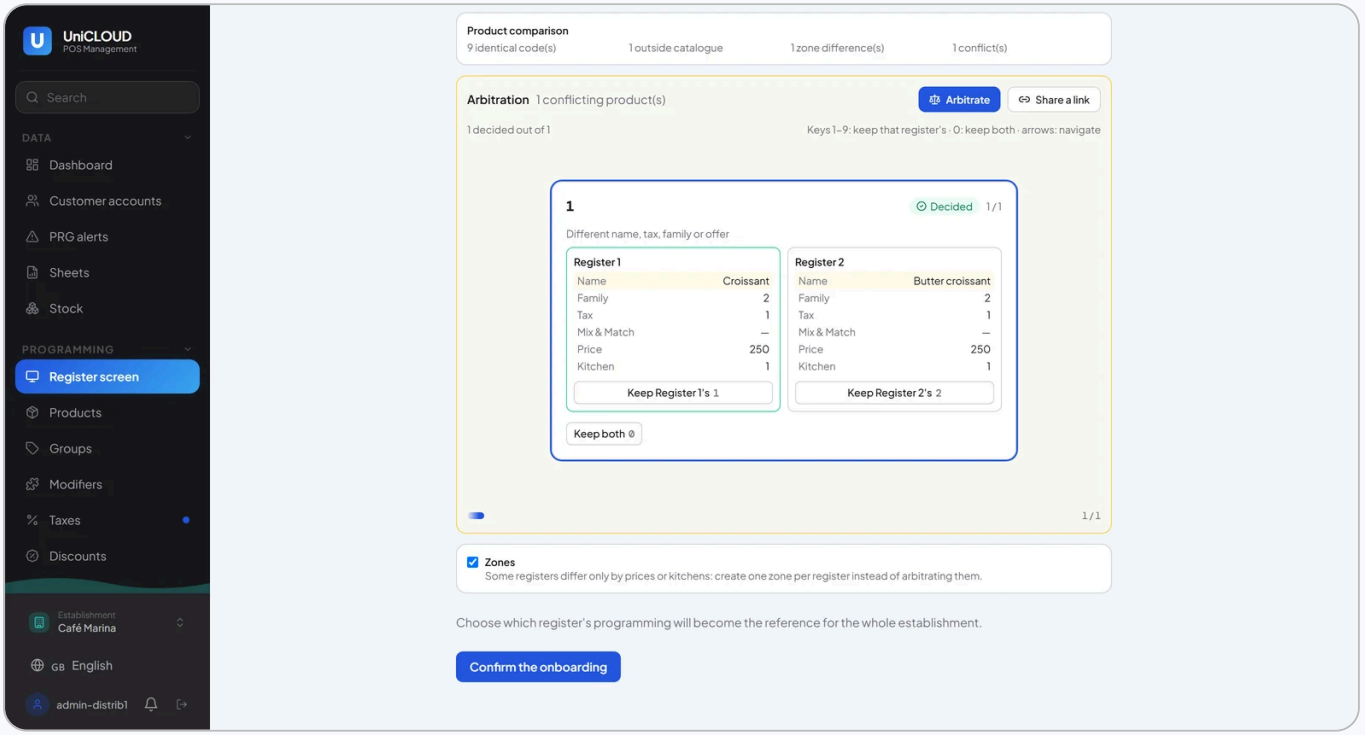


Screen · Share a link

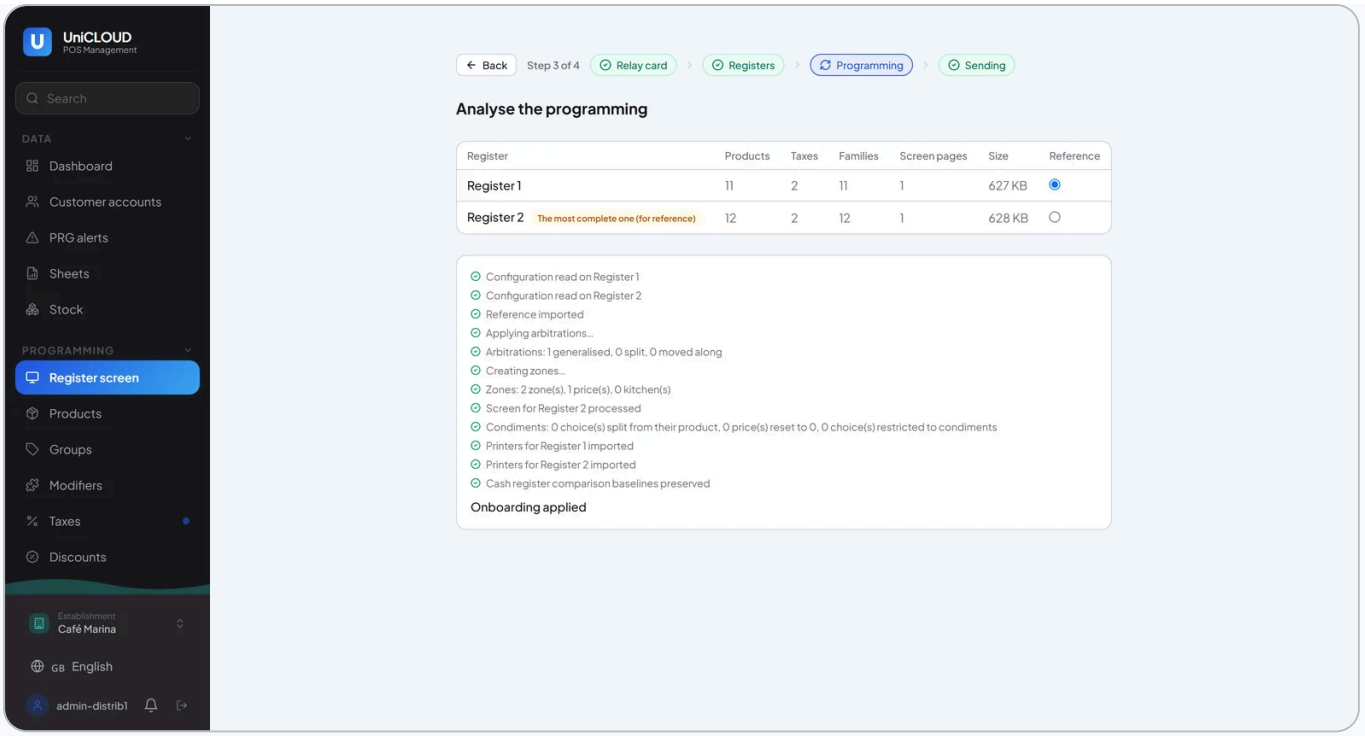
C6 Confirm the onboarding and choose the business mode

1. When no conflict remains, press **«Confirm the onboarding»**: the reference program is imported into UniCLOUD (products, taxes, families, screen, printers, zones).
2. Wait for **«Onboarding applied»**. Nothing has been sent to the registers yet.
3. Press **«Restaurant»**, **«Grocery»** or **«Hybrid»**: the choice decides which pages the merchant sees.
4. Press **«Continue to the final push»**.

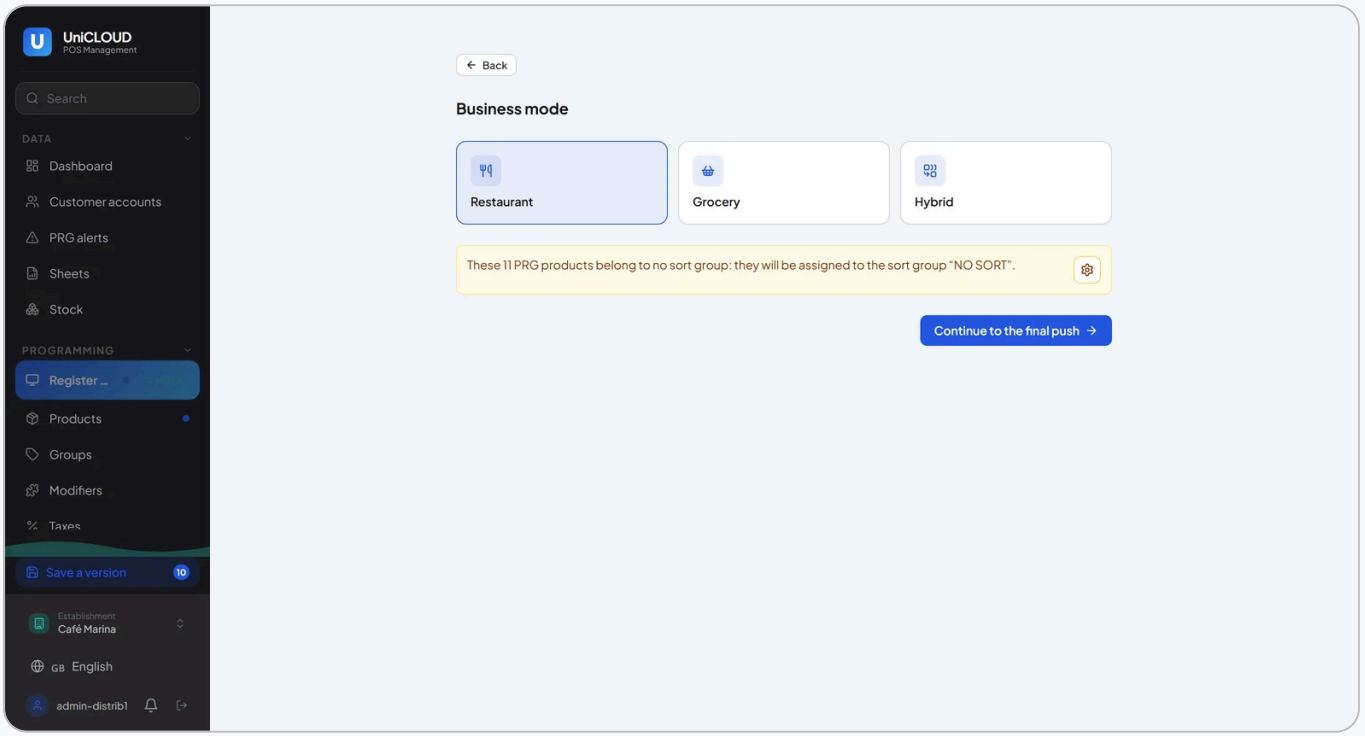
> NOTE For a grocery, an import of the previous Uniwell Lynx files appears here. The yellow notice about products without a sort group needs no action.



Screen · Ready to confirm



Screen · Onboarding applied

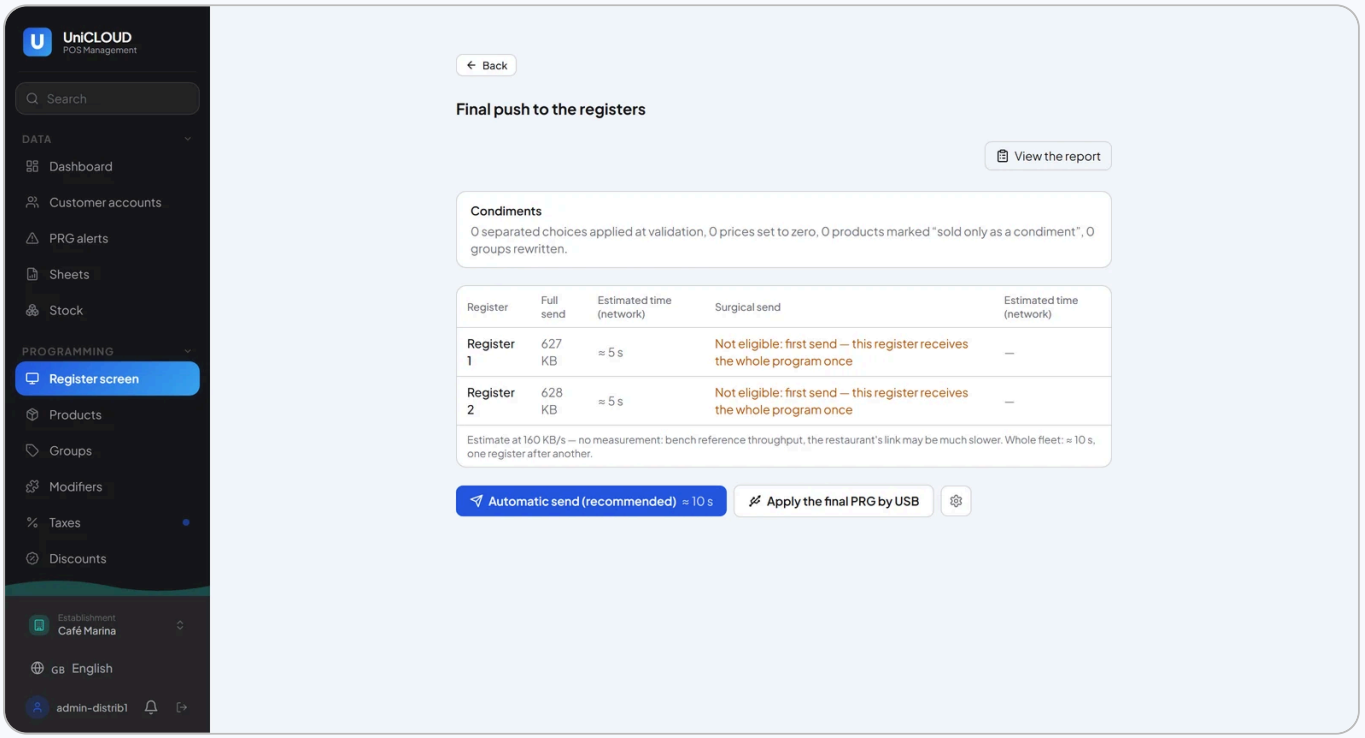


Screen · The business mode

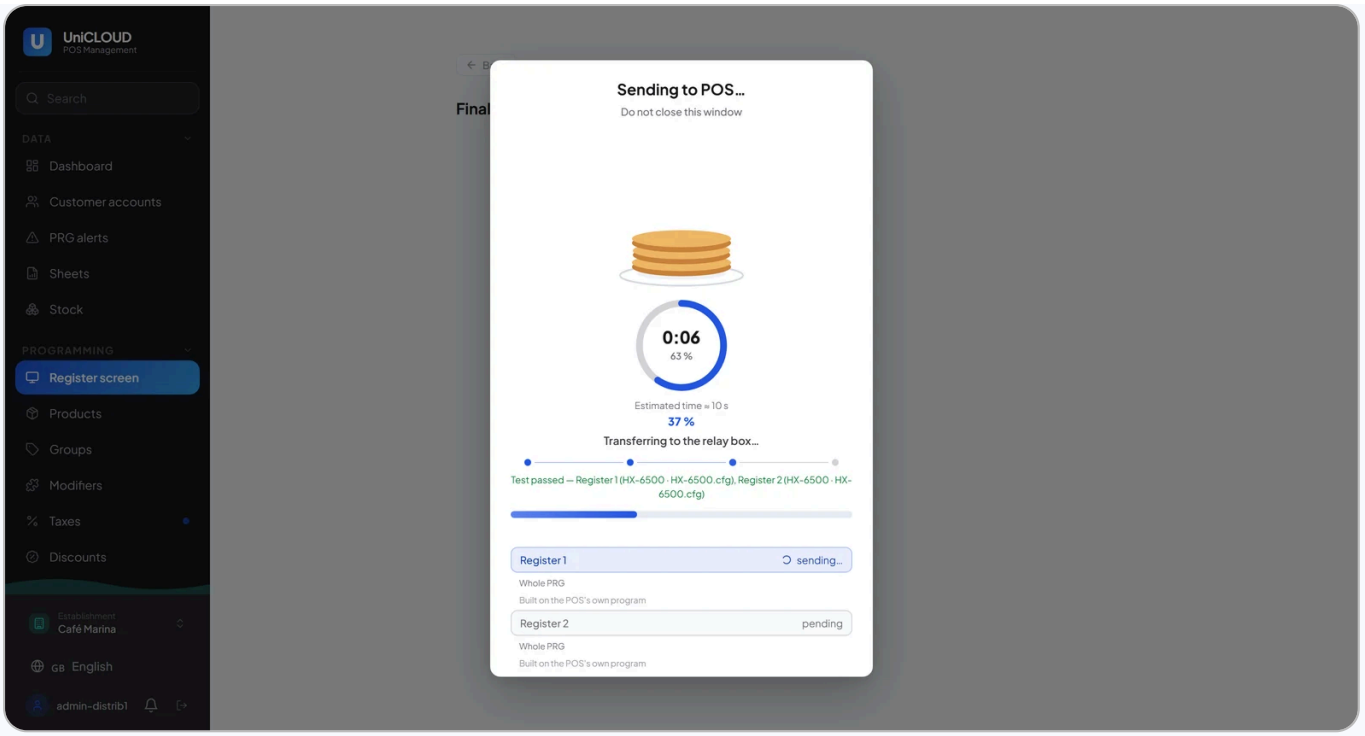
C7 Send the program to the registers

1. Pick a quiet moment: each register is unavailable while it receives the program and restarts. The registers must show their sales screen, not the manager menu.
2. Press **«Automatic send (recommended)»**. **«Apply the final PRG by USB»** prepares the files instead.
3. Do not close the window. If the estimate is exceeded, the send continues: wait.
4. **«Sent successfully»**: every register reports the program applied. **«received, not applied yet»**: the register was busy, it applies the program at its next restart.
5. Press **«Close»**, then **«Open the register screen»**.
6. Restart each register once: the configuration (CFG) is taken into account only after a restart.

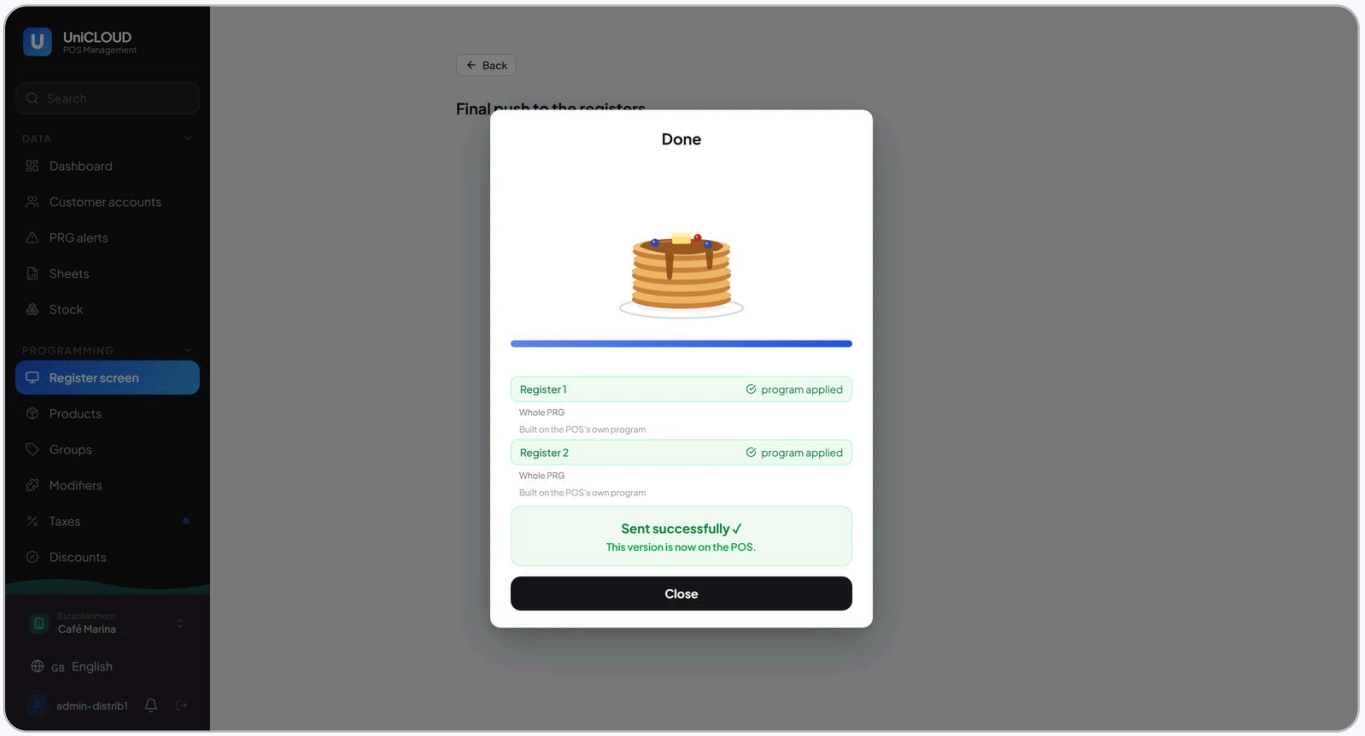
> NOTE **«View the report»** previews the change report kept in the console.



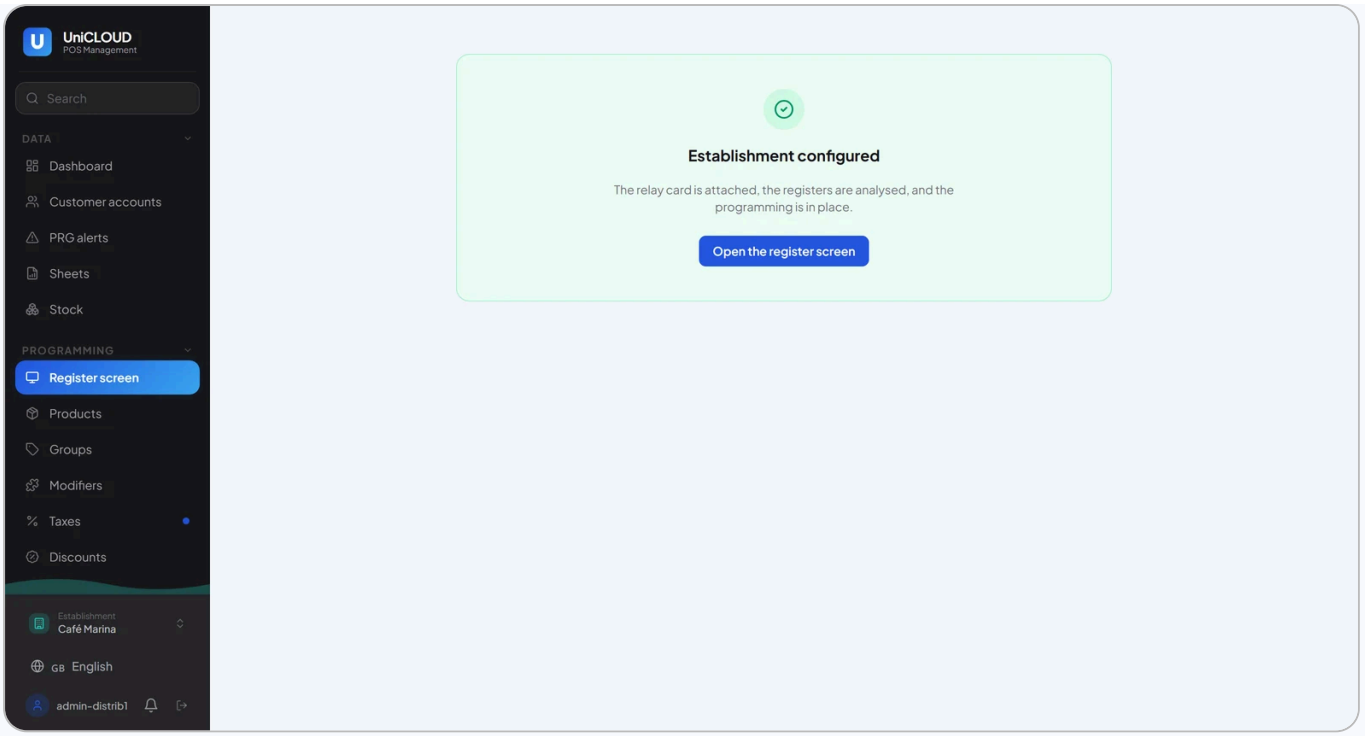
Screen · The final send



Screen · Sending



Screen · Sent and applied



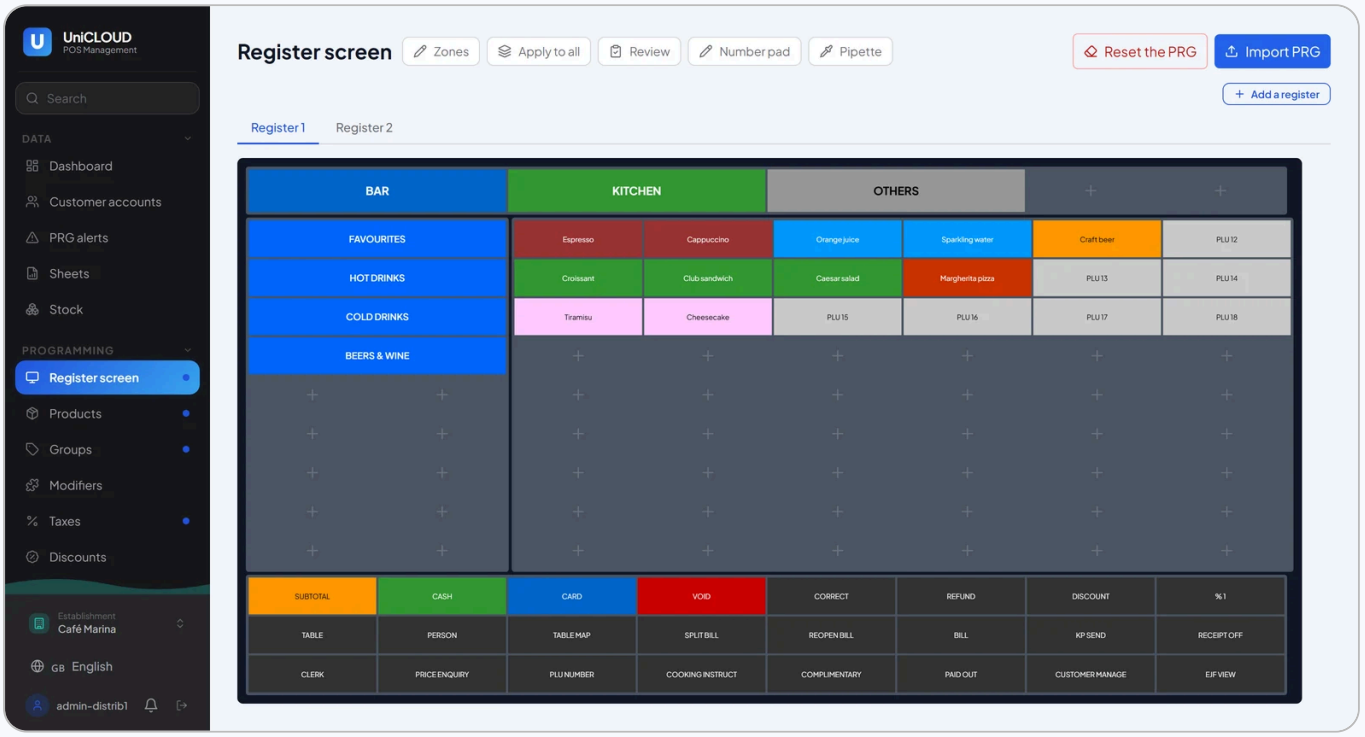
Screen · Establishment configured

D Hand over to the merchant

D1 Show the register screen

1. Under Programming, open **«Register screen»**: one tab per register.
2. The screen shows the register as it is: page groups, categories, product keys and function keys.
3. Click a key to edit it. Changes are sent to the registers from here, through the box.

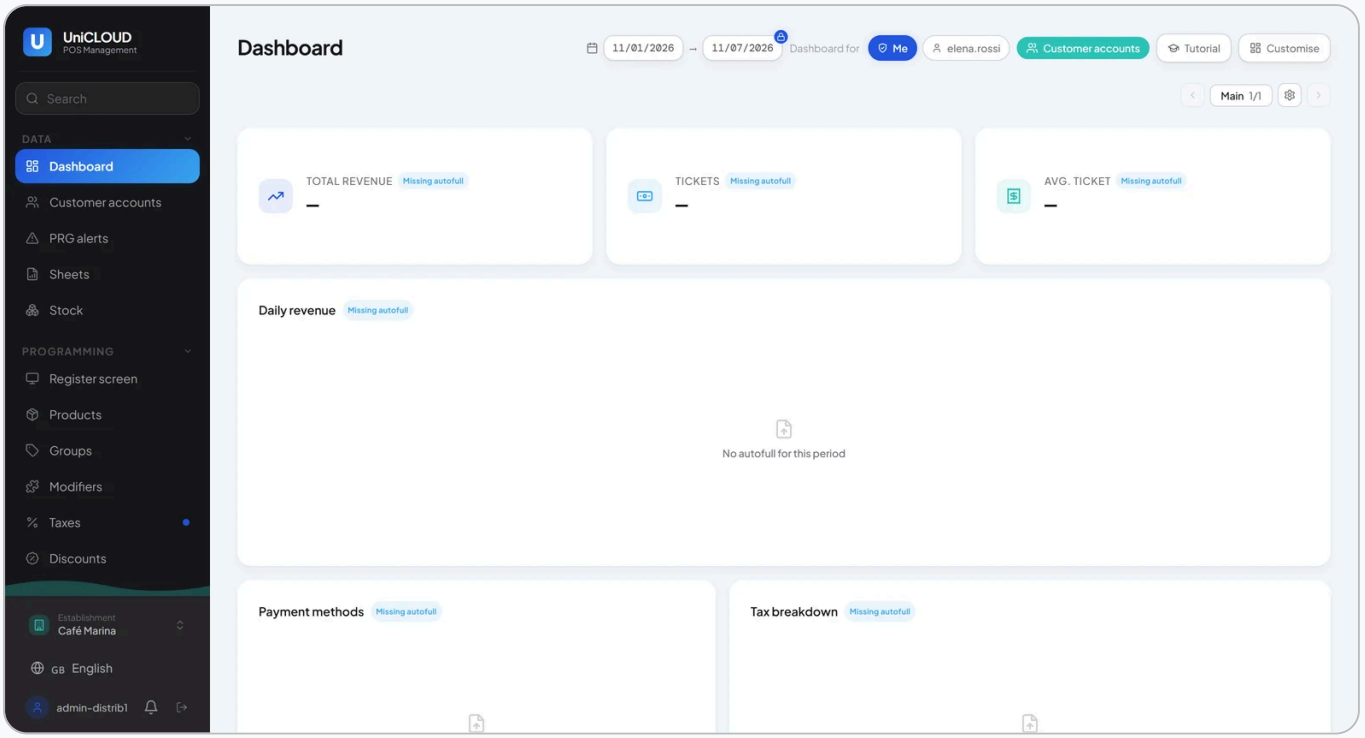
> NOTE **«Add a register»**, top right, adds a register later (E3).



Screen · The register screen after the onboarding

D2 The first day

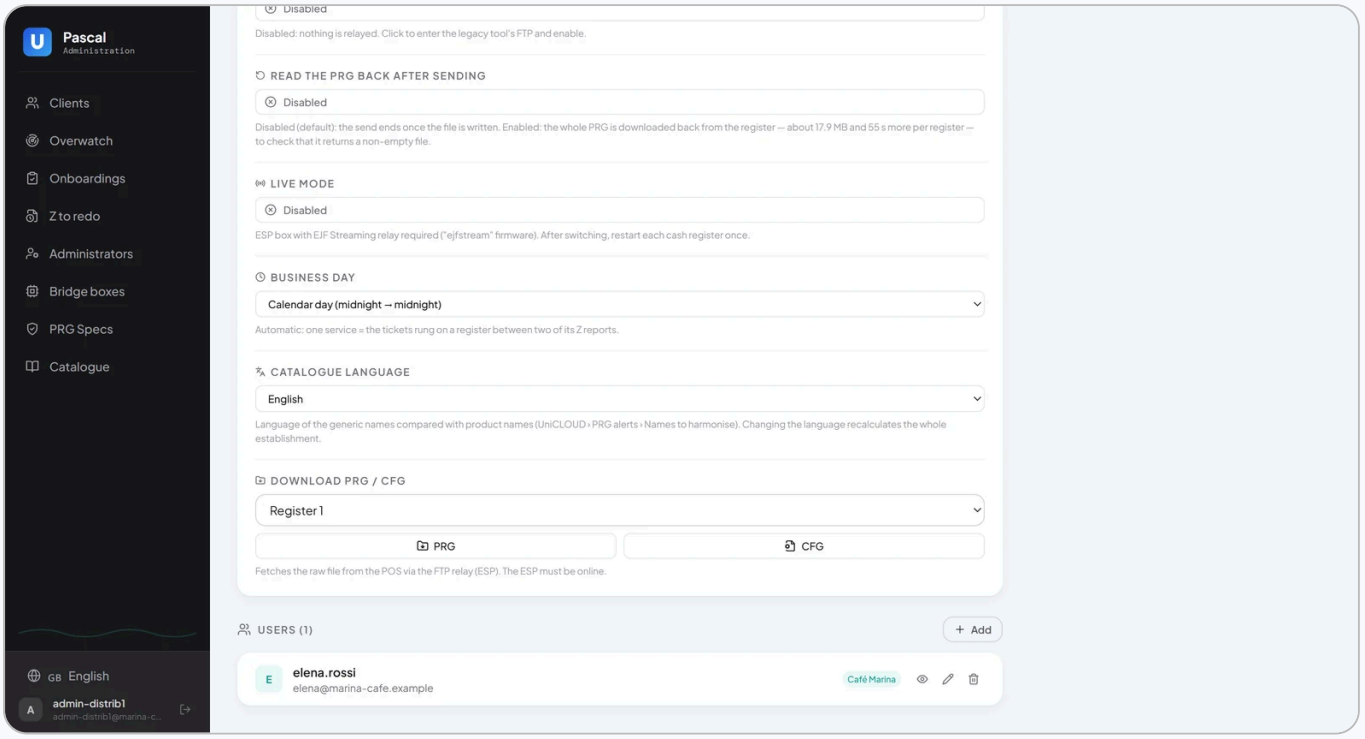
1. Open the dashboard: it stays empty until the register sends its first end-of-day (Z) report. The screen calls that file the **«autofull»**.
2. From then on, sales, payment methods and taxes update with every report.



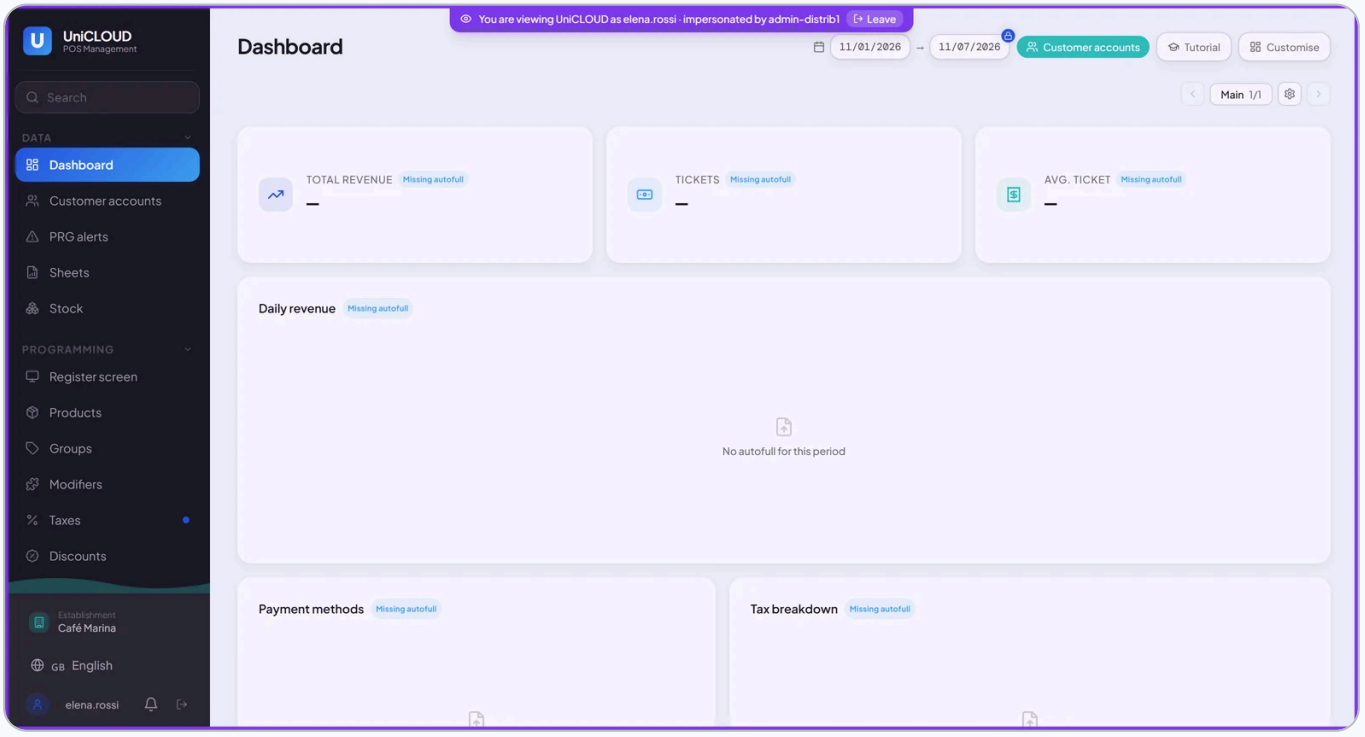
Screen · The dashboard before the first Z report

D3 See UniCLOUD as the merchant does

1. In the console, open the client record, then find the user's line.
2. Press the eye icon: the merchant's UniCLOUD opens in a new tab with the merchant's own rights. Every change you make there is recorded.
3. A banner reminds you whose account you are viewing. Press **«Leave»** to close it.



Screen · The eye icon on the user's line

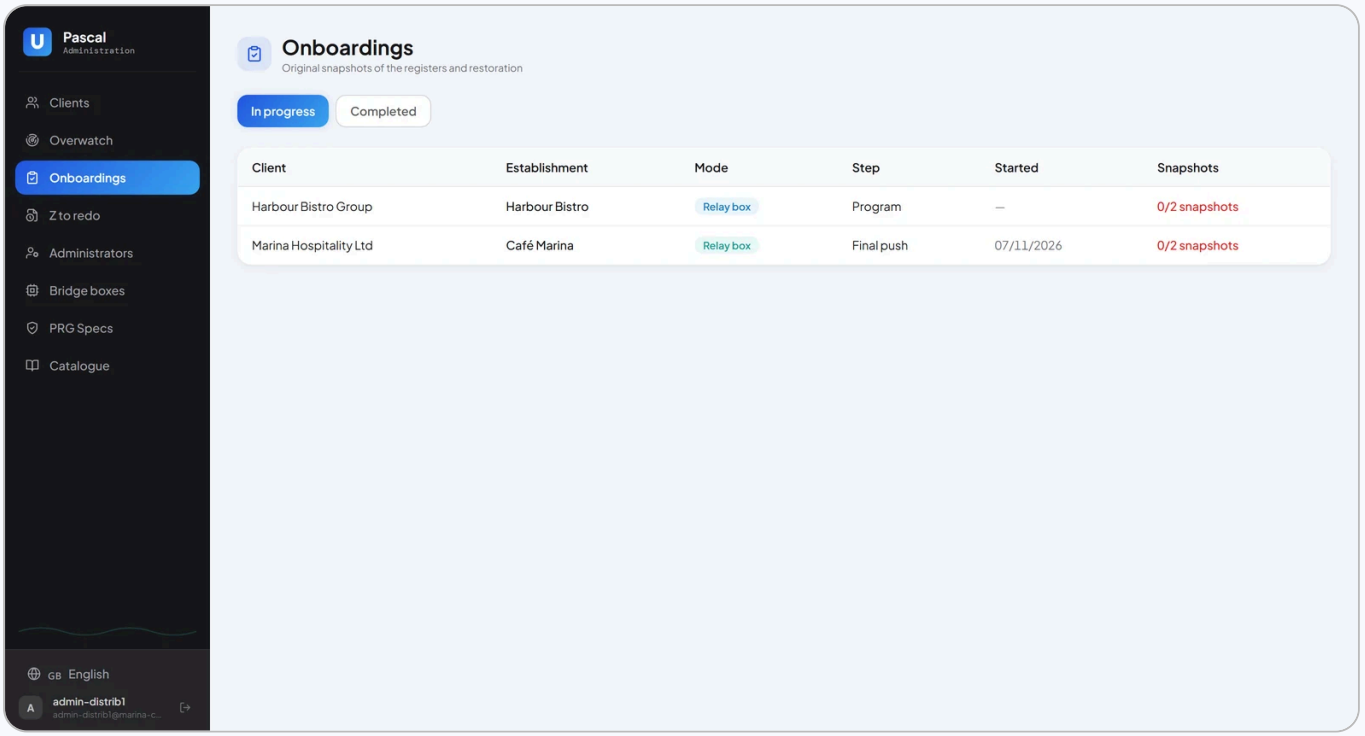


Screen · The merchant's view

E Afterwards, from the dealer platform

E1 Follow the onboardings

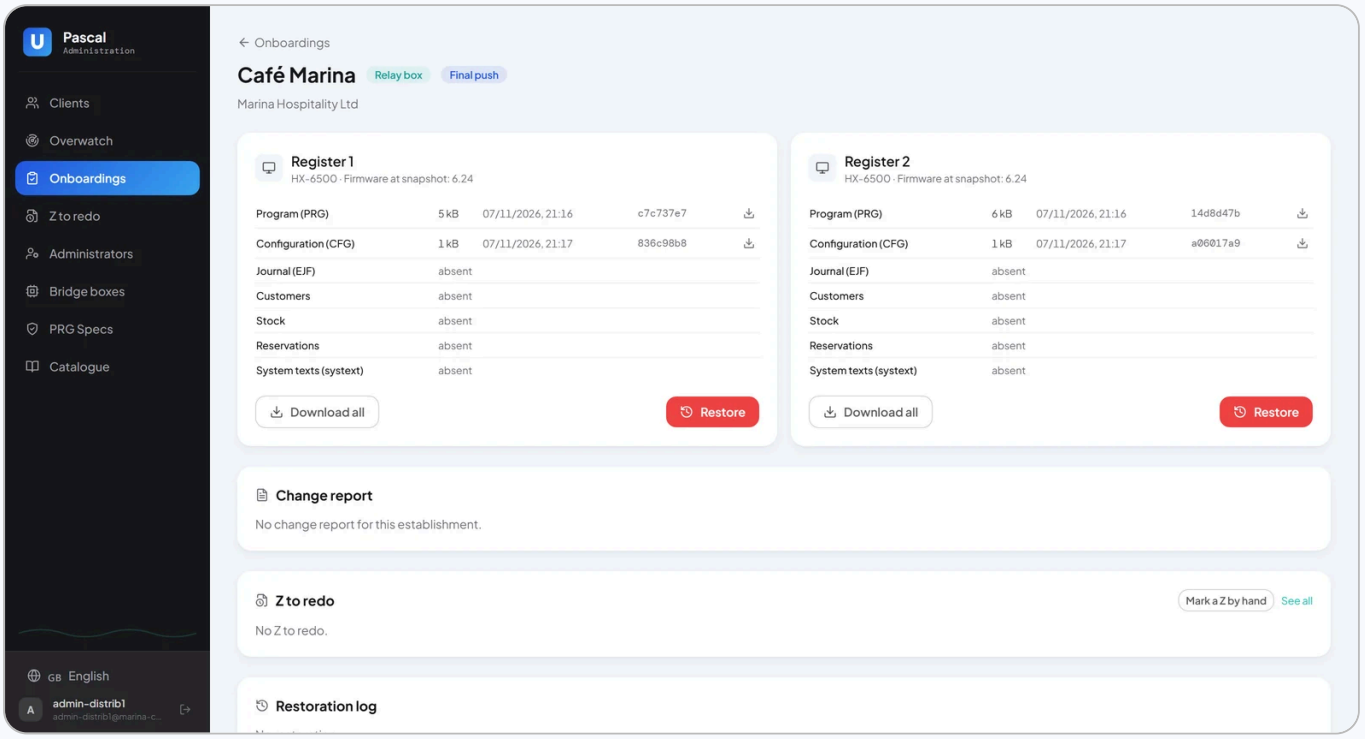
1. Open **«Onboardings»**: the establishments in progress and completed, with the mode, the current step and the number of snapshots.



Screen · The Onboardings page

E2 Restore a register or download its snapshot

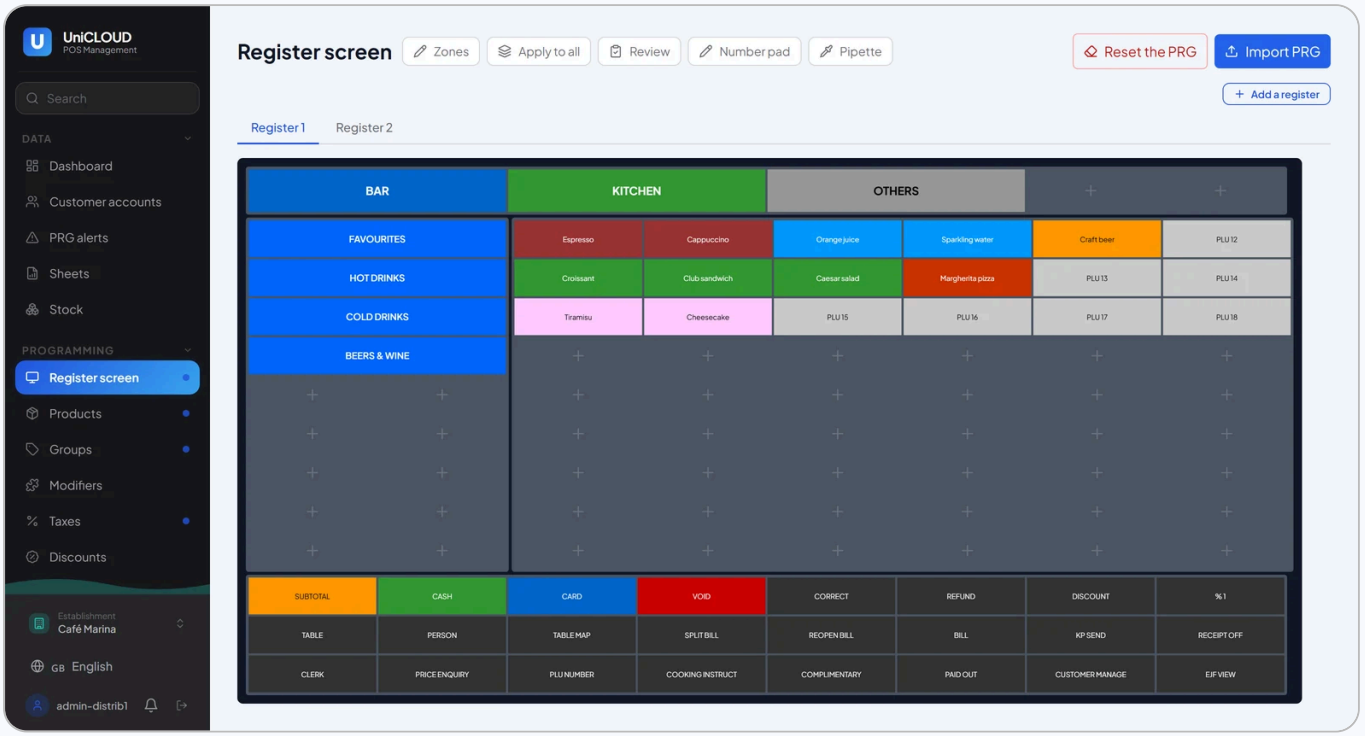
1. Open an onboarding.
2. Press **«Download all»** to keep a register's snapshot files.
3. Press **«Restore»** to put the register back to its original program and configuration, through the box, within 30 days of the onboarding.



Screen · An onboarding with its snapshots

E3 Add a register later

1. On an establishment in service, open **«Register screen»** and press **«Add a register»**.
2. Declare the new register, or one used elsewhere before: the onboarding takes its snapshot and sends it the establishment's program, built on the register's own program.



Screen · The «Add a register» button

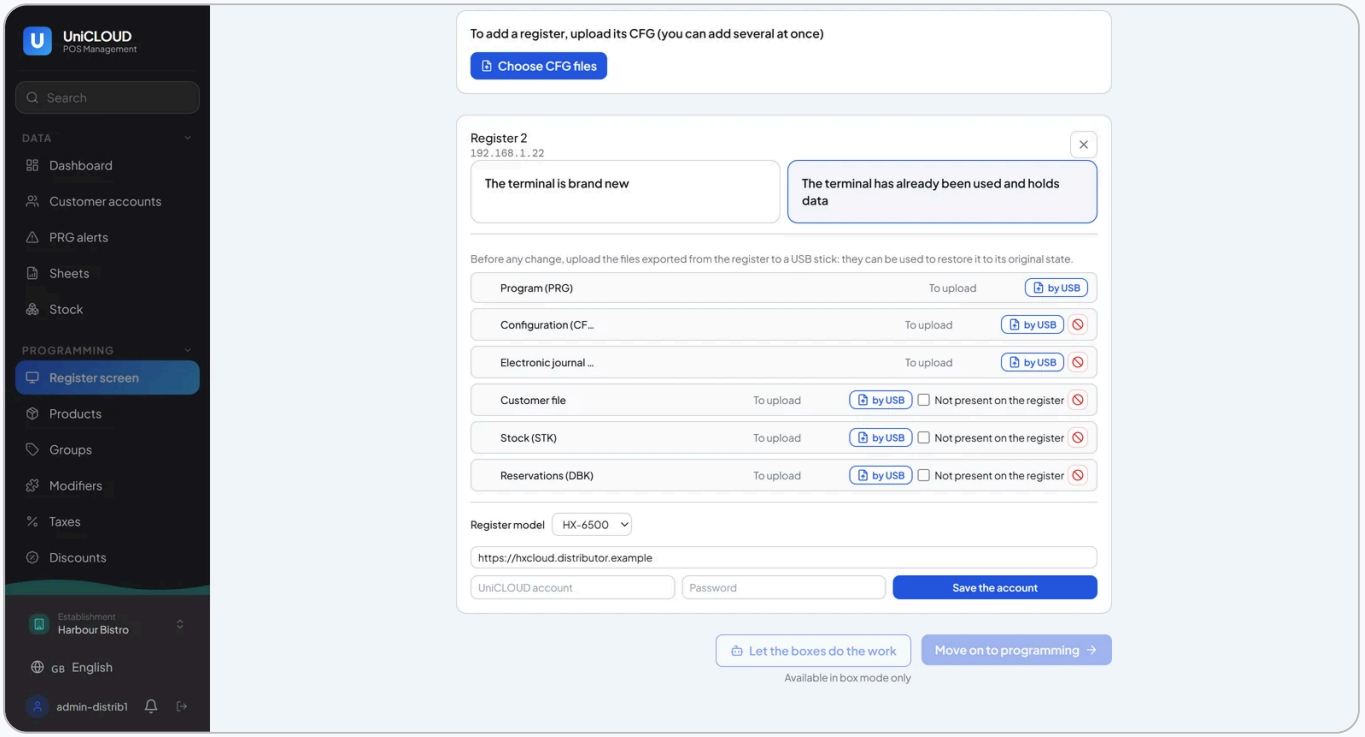
F Without a bridge box: HX Cloud

Same onboarding, three steps instead of four. Registers able to run firmware 7.00: HX-3500, HX-6500, HX-7500.

F1 Enrol the register on HX Cloud

1. At the installation mode (B2), press **«Choose»** under **«HX Cloud»**.
2. Declare each register by its CFG file (firmware 7.00 or later) and upload its snapshot files from the key.
3. Check the server address (prefilled), the **«UniCLOUD account»** and the password, then press **«Save the account»**: the register is enrolled on the HX Cloud server.
4. The final send prepares the files for the USB key instead of the box.

> NOTE UniCLOUD then reads the register's data from the HX Cloud server. This example uses a second establishment, Harbour Bistro.



Screen · The HX Cloud enrolment form

F2 What changes without a box

	With the bridge box	HX Cloud
Sales and dashboard	Yes	Yes
Products, prices, groups, taxes, clerks	Full programming	Main attributes
Register screen, kitchens, printing, clerk rights on the register	Yes	No
Click & Collect and kiosk	Yes	No
Sending a program	Through the box	Full program: USB key. Attribute changes: HX Cloud server
Register firmware	5.62 or later	7.00 or later

G Troubleshooting

G1 If something does not go as planned

The box is offline

- The onboarding pauses the steps that need it, nothing is lost.
- Check power, cable or Wi-Fi, wait a minute, press **«Check now»**.

Firmware too old or mixed

- All registers of a site must run the same version.
- The screen shows three ways to update: USB key, the Windows update tool, or through the box.

Communication test times out

- Sign on again on the register: **«Report Push Up»**, **«TEST UNICLOUD»**, **«Push Up Start»**.
- Register on its sales screen, box online, then **«Test again»**.

Conflicts remain

- The confirmation stays greyed until every product is arbitrated.
- Share the link with the merchant (C5).