Synergy Cloud Report for Android - First Sign-in and Users

This guide is for shops that run the Synergy Order App without a POS PC. It shows the owner how to sign in to the Cloud Report website for the first time, and how to give managers and viewers access.

Before you start

- Synergy has set up your shop for Cloud Report and has your owner e-mail address.
- The main device of each branch must be on a recent Order App version and have internet, so it can send its closed bills.
- Have access to the owner e-mail, because the website e-mails you a code.

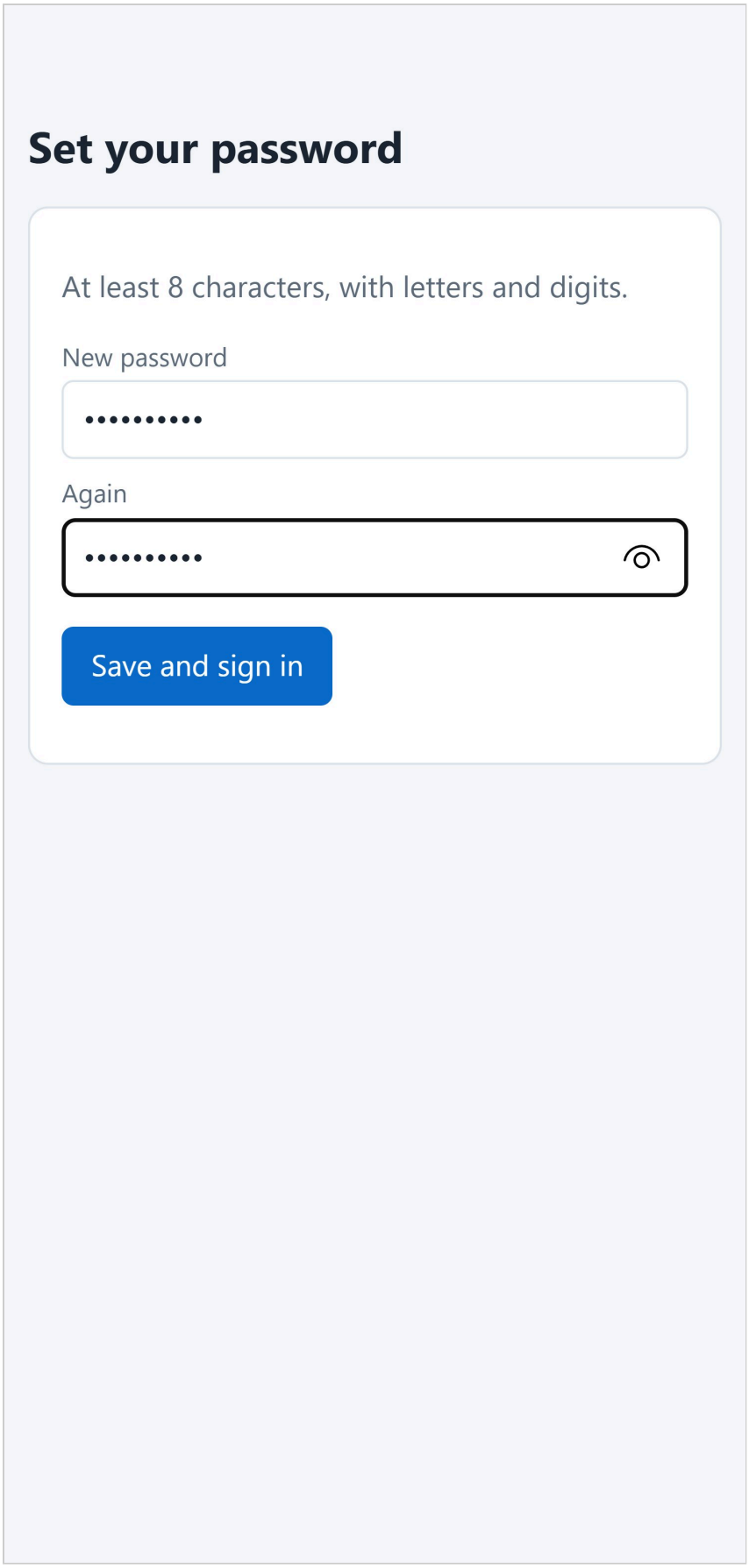
Steps

1. Open the invitation

Open the invitation e-mail from Synergy and click the link. It opens the Set password page.

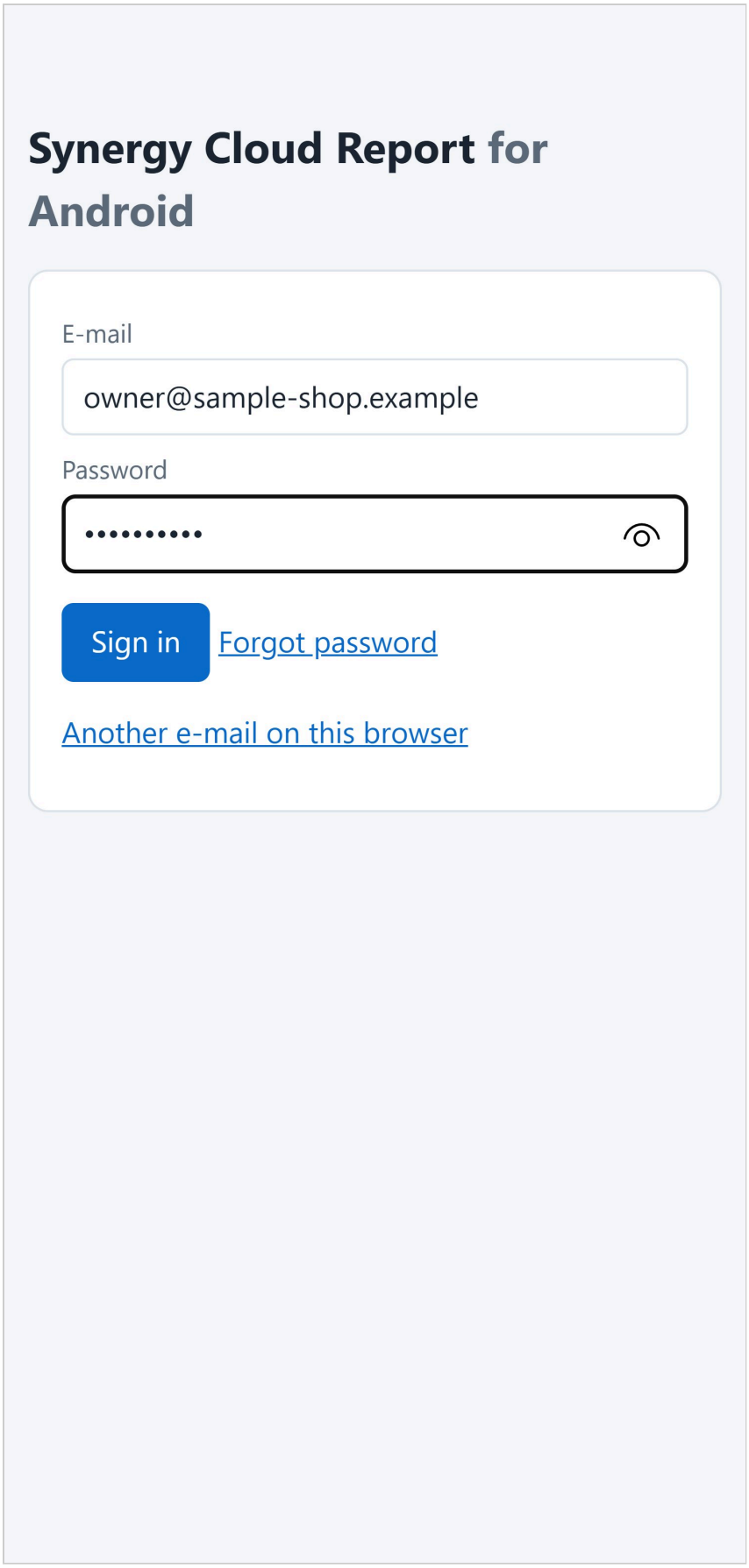
2. Choose a password

Type a password and save it.



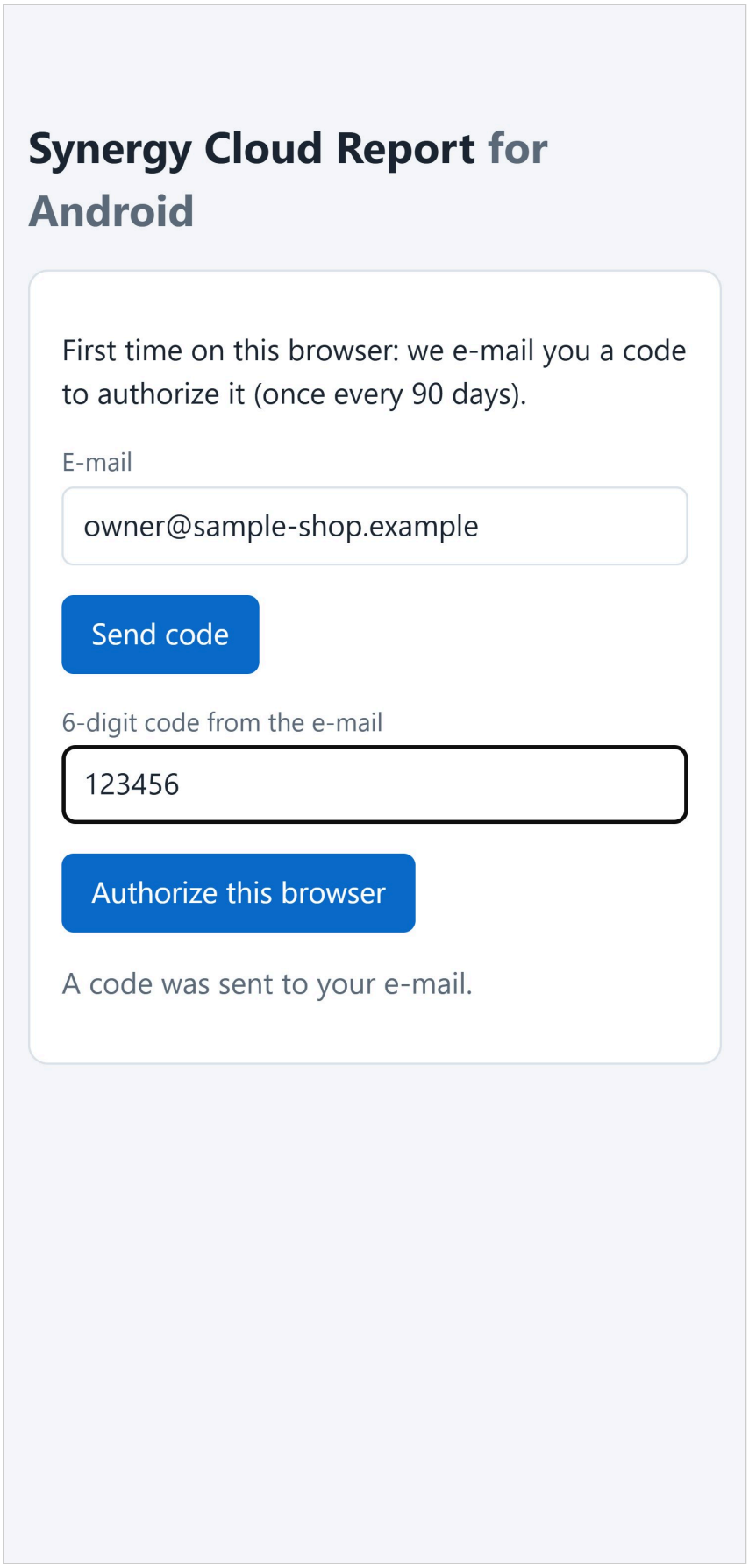
3. Sign in

Sign in with your e-mail address and the new password.



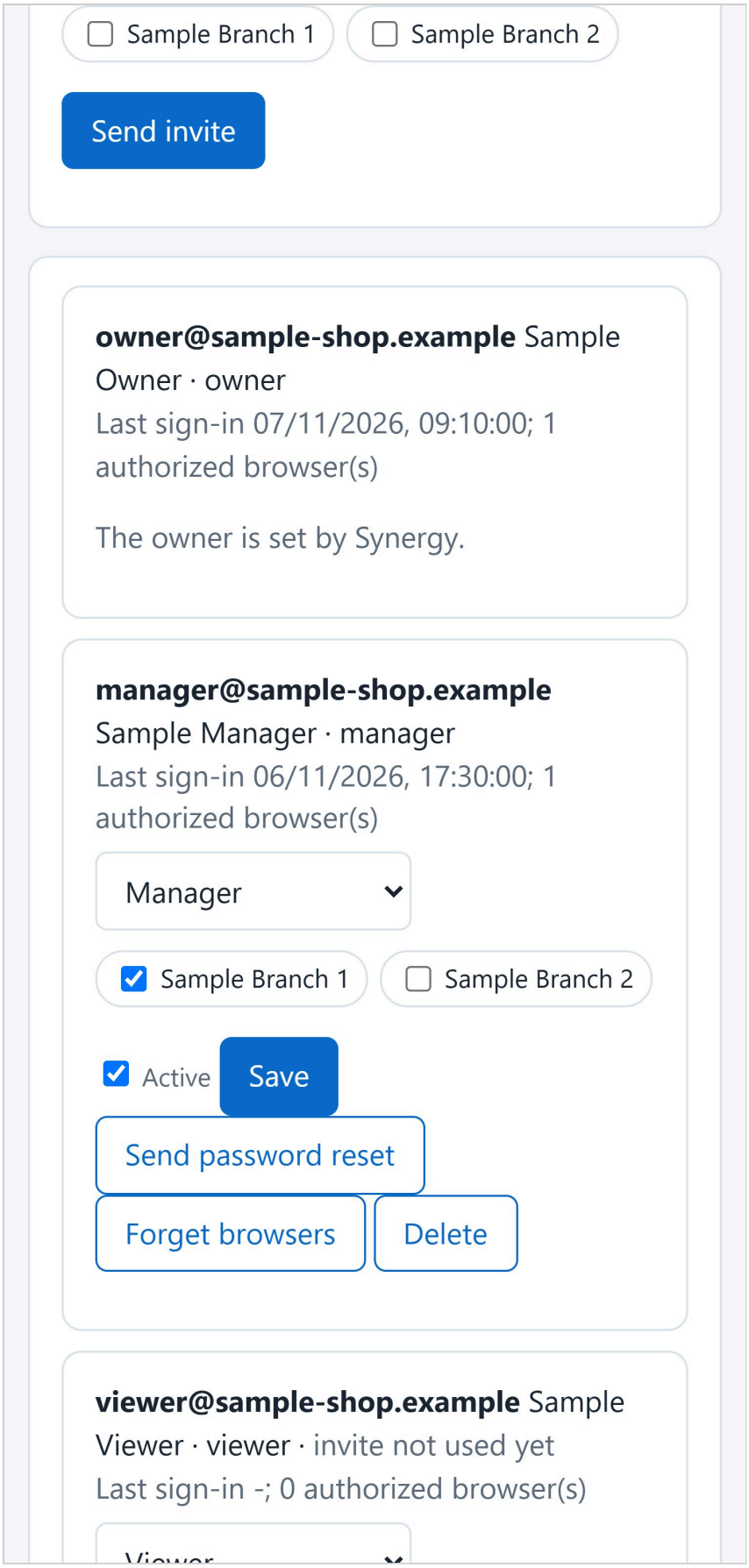
4. Enter the e-mailed code

A new browser needs a code. The website e-mails you a code; type it in. This browser is then authorized for 90 days.



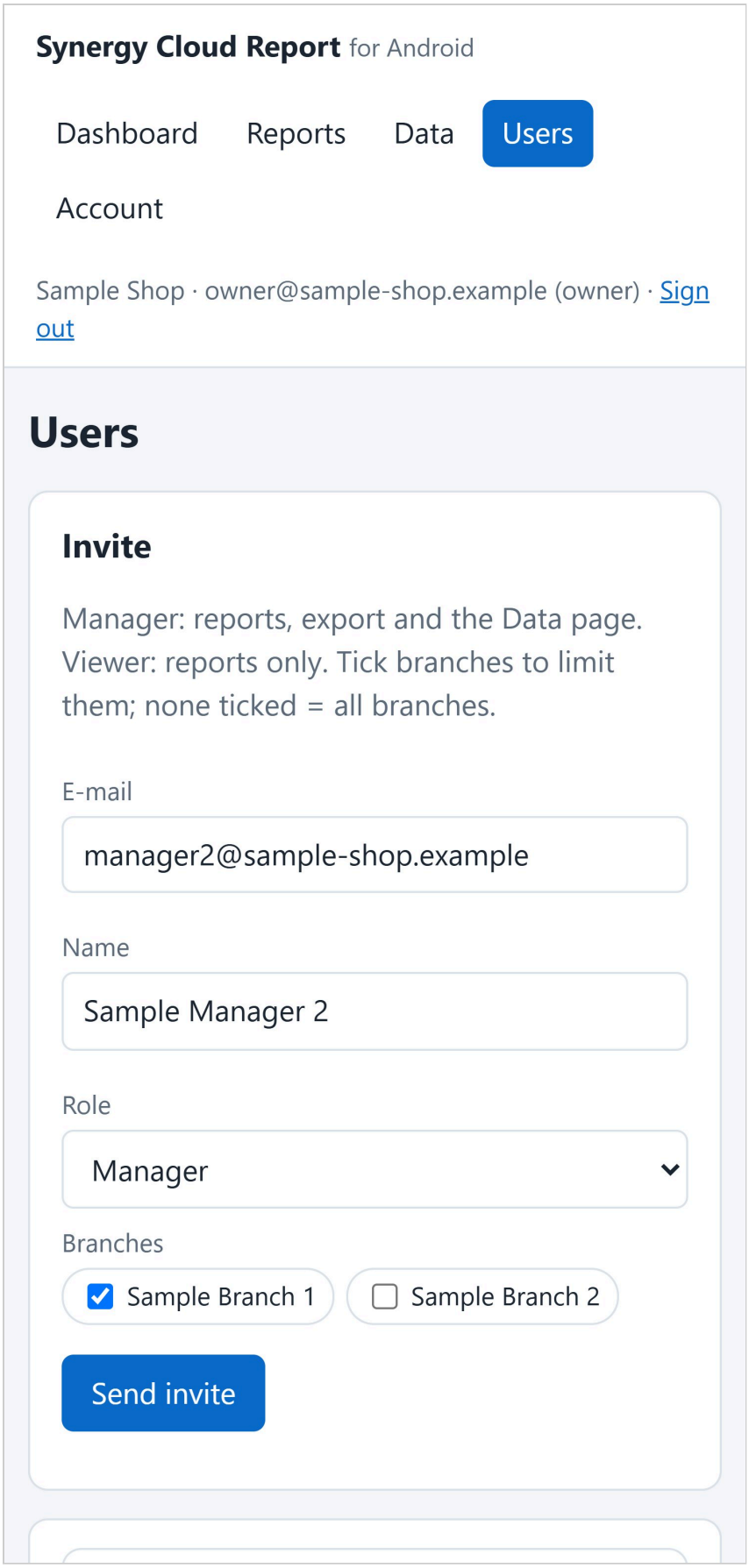
5. Open the Users page

As the owner, open the Users page.



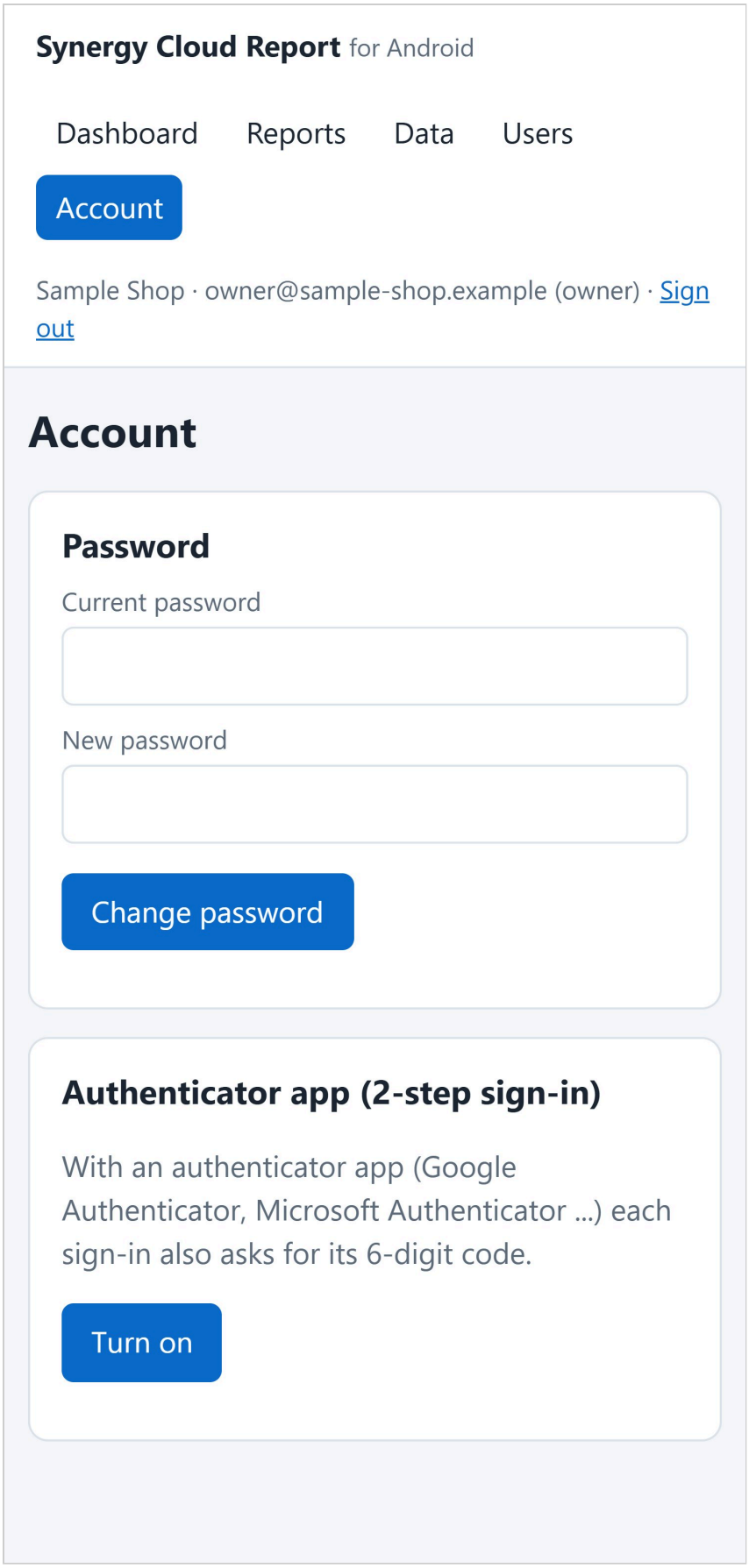
6. Invite a user

Invite a person by e-mail, choose the role, and choose the branches they may see.



7. Optional: add an authenticator app

On the Account page you can add an authenticator app such as Google Authenticator or Microsoft Authenticator. Sign-in then also asks for the 6-digit code.



Tips

- Owner: sees all branches and can manage users, use the Data page, export and purge.
- Manager: sees the branches chosen and can see the reports, export and use the Data page.

- Viewer: sees the branches chosen and can see the reports only.
- Each new browser, phone or PC must be authorized once with an e-mailed code, and is remembered for 90 days.
- 5 wrong passwords for the same e-mail, or 20 from the same internet address, lock sign-in for 15 minutes.
- If you change the owner e-mail with Synergy, the new owner is invited and the old owner stays as a Manager. Remove them on the Users page if needed.

Common problems

I did not get the invitation e-mail.

Check the spam folder and check with Synergy that the owner e-mail is correct.

The code e-mail does not arrive.

Check spam, wait a minute and try again. If it still does not come, tell Synergy.

I forgot my password.

Click Forgot password on the sign-in page. A link is e-mailed so you can set a new one.

Sign-in is locked.

Wait 15 minutes, then try again with the right password.

Draft: written from Synergy's support notes (checked by AI against the program), not yet reviewed by Synergy staff.

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