

# **NCR Atleos Intelligent Asset Manager Customer User Guide**

**October 2025**

**v.1.1.1**

**IMPORTANT: This is the Customer User Guide.**

**NCR Atleos Users [Click here](#) for internal documentation.**

# Table of Contents

- Customer Portal Access .....3
- View Asset List.....4
- Update Site Name.....5
- Service Tag (ATM ID) update .....6
- Filter .....7
- Sorting .....9
- Exporting data..... 10
- Demo Video of Customer View..... 11
- Help & Feedback..... 11
- Future Rollouts Planned ..... 11

## Customer Portal Access

Login to your account in the [NCR Atleos customer portal](#).

If you do not have Portal access, [request it here](#) and note in the comments that you need access to the Intelligent Asset Manager application.

## Intelligent Asset Manager application access

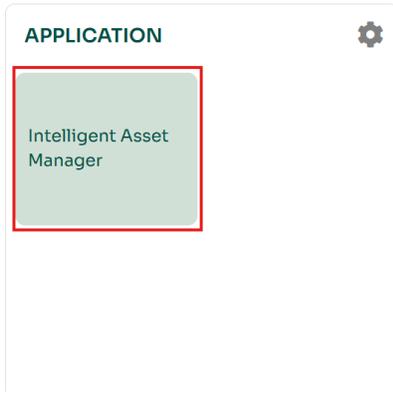
If you do not see Intelligent Asset Manager in the Application portlet, click the gear to request access.

The screenshot shows the NCR Atleos Customer Portal dashboard. At the top, there is a navigation bar with the NCR Atleos logo and links for Home, Invoices, Orders, and Account Administration. On the right, there is a user profile for Kimberly. Below the navigation bar, there is a secondary menu with Dashboard, My Applications, and Messages. A prominent yellow banner at the top of the main content area reads "Security Update Coming in October" and provides information about multi-factor authentication (MFA) requirements starting in October. Below the banner, there are three portlets: "ORDERS" with search filters for Status, Range, and Search By; "INVOICE DISPUTES" showing 0 disputes awaiting feedback and 0 in WIP; and "APPLICATION" which is currently empty and has a gear icon in the top right corner.

Then, select 'Intelligent Asset Manager' and click 'Update'. If you do not see Intelligent Asset Manager in the list of applications to request, send an email to [iam.help@ncratleos.com](mailto:iam.help@ncratleos.com)

This screenshot shows a close-up of the "APPLICATION" portlet. It features a gear icon in the top right corner. A red box highlights a checkbox next to the text "Intelligent Asset Manager". To the right of this text is a link that says "Add/Request More Applications". At the bottom of the portlet, there are two buttons: "Cancel" and "Update". The "Update" button is highlighted with a red box.

You will now see the app. **Your access may take up to 1 business day to be approved.**  
**Pending access approval, you will not be able to successfully launch the app.**



## View Asset List

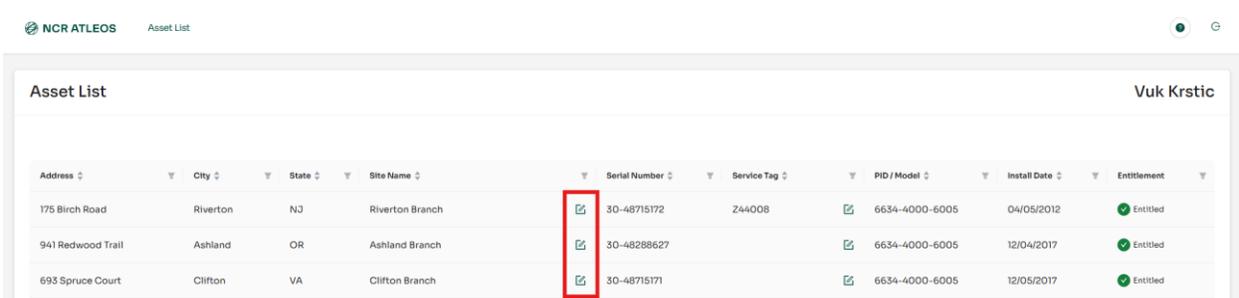
Upon launching the app, the Asset List page is displayed, populated with data relevant to the user's account.

The screenshot displays the 'Asset List' page in the NCR ATLEOS application. The page header includes the NCR ATLEOS logo and the text 'Asset List' on the left, and the user's name 'Vuk Krstic' on the right. The main content is a table with the following columns: Address, City, State, Site Name, Serial Number, Service Tag, PID / Model, Install Date, and Entitlement. Each row represents an asset with its corresponding details. The 'Entitlement' column contains icons and text indicating the status of each asset's entitlement.

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
769 Hickory Place	Dover	DE	Dover Branch	94-48921316	Z44009	2012-2000-6000	03/07/2008	Review Entitlements
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled
285 Magnolia Avenue	Milford	CT	Milford Branch	83-41402815	Z44010	6632-2000-6012	07/07/2006	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	83-45455064	Z44006	6632-2000-6005	05/07/2018	Entitled
169 Sycamore Terrace	Madison	WI	Madison Branch	30-49761423	Z44012	6634-4000-6005	04/06/2008	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881912	Z44013	6634-4000-6005	07/04/2006	Entitled
810 Oak Boulevard	Brookhaven	NY	Brookhaven Branch	83-45455066	Z44005	6632-2000-6005	06/05/2017	Not Entitled

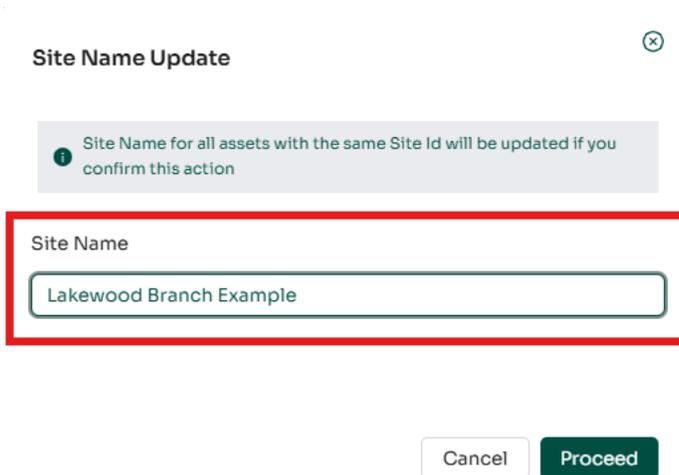
## Update Site Name

Next to each Site Name there is an icon for updating.



Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled

Pop up will appear where you can type new Site Name.



**Site Name Update** ✕

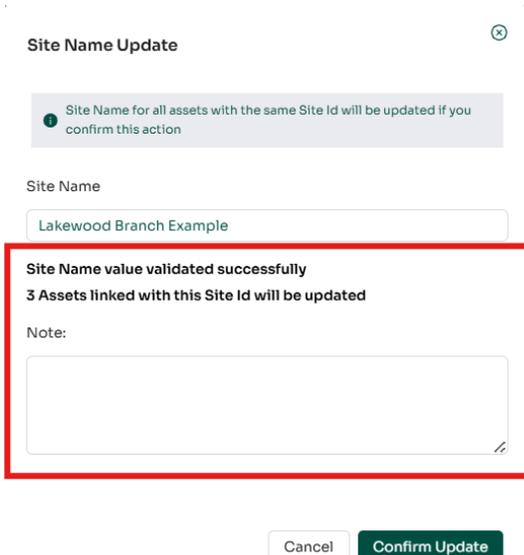
**i** Site Name for all assets with the same Site Id will be updated if you confirm this action

Site Name

Lakewood Branch Example

Cancel Proceed

Confirmation Pop up will appear where you can see how many assets are linked to this site. You can leave a note about why this change is requested.



**Site Name Update** ✕

**i** Site Name for all assets with the same Site Id will be updated if you confirm this action

Site Name

Lakewood Branch Example

**Site Name value validated successfully**  
**3 Assets linked with this Site Id will be updated**

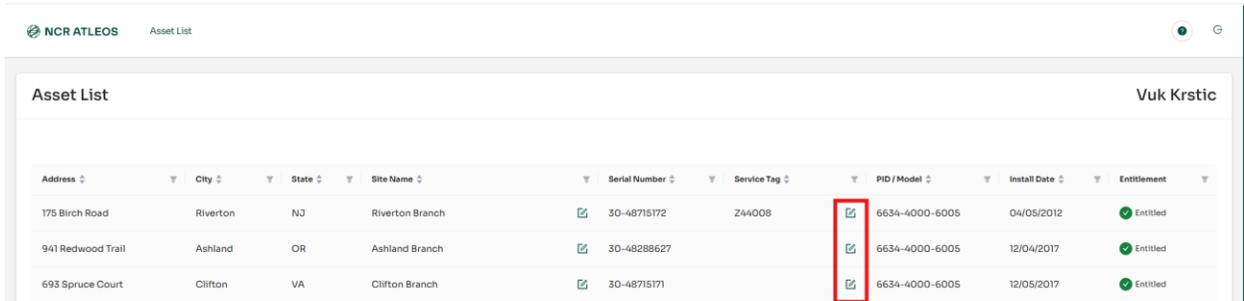
Note:

Cancel Confirm Update

Site updates will be synced to the NCR Atleos Customer Database (NCDM) within 3 business days.

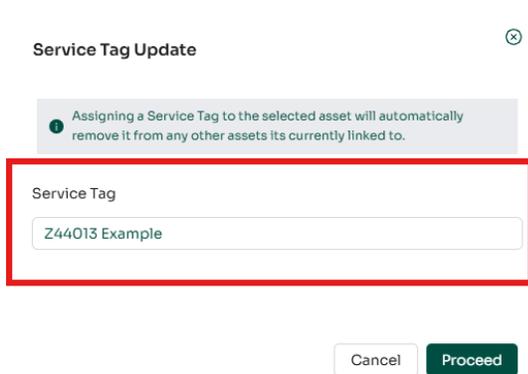
## Service Tag (ATM ID) update

Next to each Service Tag there is an icon for updating.



Address	City	State	Site Name	Serial Number	Service Tag	PID/Model	Install Date	Entitlement
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled

Pop up will appear where you can type new Service Tag.



**Service Tag Update**

Assigning a Service Tag to the selected asset will automatically remove it from any other assets its currently linked to.

Service Tag  
Z44013 Example

Cancel Proceed

Confirmation Pop up will appear where you can leave a note about why this change is requested.

**Service Tag Update** ⓧ

**!** Assigning a Service Tag to the selected asset will automatically remove it from any other assets its currently linked to.

Service Tag

Z44013 Example

**Service Tag value validated successfully**

Note:

Cancel Confirm Update

Service Tag updates will be synced to the NCR Atleos Customer Database (NCDM) within 3 business days.

## Filter

Next to each column there are icons for filters.

NCR ATLEOS Asset List Vuk Krstic

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled

Clicking on the icon, pop up appears where you can type what you want to filter by. Clicking on the Search button you will get filtered data.

Site Name

Lakewood Branch

Lakewood Branch

Search

Click on the X to clear the filter.

Asset List Vuk Krstic

Site Name: Lakewood Branch

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
902 Elm Street	Lakewood	CO	Lakewood Branch	83-45455064	Z44006	6632-2000-6005	05/07/2018	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881912	Z44013	6634-4000-6005	07/04/2006	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881918		6632-2000-6005	12/13/2017	Not Entitled

Export CSV Total: 3 assets

Also, you can filter by multiple columns by applying a filter to the first column, then repeat the same process for each additional column.

Asset List Vuk Krstic

Site Name: Lakewood Branch

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
902 Elm Street	Lakewood	CO	Lakewood Branch	83-45455064	Z44006	6634-4000-6005	05/07/2018	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881912	Z44013	6634-4000-6005	07/04/2006	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881918		6632-2000-6005	12/13/2017	Not Entitled

Export CSV Total: 3 assets

All filters you have applied are listed directly above the table.

Asset List Vuk Krstic

Site Name: Lakewood Branch Product ID: 6634-4000-6005 Clear All

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881912	Z44013	6634-4000-6005	07/04/2006	Entitled

Export CSV Total: 1 assets

Or by partial filter

Asset List Vuk Krstic

Site Name: Lakewood

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
902 Elm Street	Lakewood	CO	Lakewood Branch	83-45455064	Z44006	6632-2000-6005	05/07/2018	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881912	Z44013	6634-4000-6005	07/04/2006	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881918		6632-2000-6005	12/13/2017	Not Entitled

Export CSV Total: 3 assets

## Sorting

Clicking a column header sorts the data in descending order by that column.

Asset List Vuk Krstic

Click to sort descending

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled

Clicking again the same column header sorts the data in ascending order by that column.

Asset List Vuk Krstic

Click to sort ascending

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
909 Willow Drive	Springdale	AR	Springdale Branch	83-45455065	Z44007	2012-2000-6000	08/06/2017	Not Entitled
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled
285 Magnolia Avenue	Milford	CT	Milford Branch	83-41402815	Z44010	6632-2000-6012	07/07/2006	Entitled

Clicking on it again cancels the sort.

Asset List Vuk Krstic

Click to cancel sort

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
810 Oak Boulevard	Brookhaven	NY	Brookhaven Branch	83-45455066	Z44005	6632-2000-6005	06/05/2017	Not Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled

## Exporting data

On the bottom of the page is a button for exporting data in CSV.

285 Magnolia Avenue	Milford	CT	Milford Branch		83-41402815	Z44010		6632-2000-6012	07/07/2006		Entitled
175 Birch Road	Riverton	NJ	Riverton Branch		30-48715172	Z44008		6634-4000-6005	04/05/2012		Entitled
909 Willow Drive	Springdale	AR	Springdale Branch		83-45455065	Z44007		2012-2000-6000	08/06/2017		Not Entitled

1 20 / page Total: 11 assets

**Export CSV**

Exported data.

	A	B	C	D	E	F	G	H	I	J	K	L
	Address Line1	Address Line2	City	State	Site Name	Site Number	Serial Number	Service Tag	Customer Number	PID/Model	Install Date	Entitlement
2	941 Redwood Trail		Ashland	OR	Ashland Branch	7668106	30-48288627		44013001CN	6634-4000-6005	12-04-17	Entitled
3	810 Oak Boulevard		Brookhaven	NY	Brookhaven Branch	7871121	83-45455066	Z44005	44013001CN	6632-2000-6005	06-05-17	Not Entitled
4	693 Spruce Court	(LAKESIDE BRANCH)	Clifton	VA	Clifton Branch	7870486	30-48715171		44013001CN	6634-4000-6005	12-05-17	Entitled
5	769 Hickory Place		Dover	DE	Dover Branch	8777951	94-48921316	Z44009	44013001CN	2012-2000-6000	03-07-08	Entitled
6	902 Elm Street		Lakewood	CO	Lakewood Branch	6299109	30-44881918		44013001CN	6632-2000-6005	12/13/2017	Not Entitled
7	902 Elm Street		Lakewood	CO	Lakewood Branch	6299109	83-45455064	Z44006	44013001CN	6632-2000-6005	05-07-18	Entitled
8	902 Elm Street		Lakewood	CO	Lakewood Branch	6299109	30-44881912	Z44013	44013001CN	6634-4000-6005	07-04-06	Entitled
9	169 Sycamore Terrace		Madison	WI	Madison Branch	8043679	30-49761423	Z44012	44013001CN	6634-4000-6005	04-06-08	Entitled
10	285 Magnolia Avenue	SFO ADMIN BUILDING	Milford	CT	Milford Branch	6310242	83-41402815	Z44010	44013001CN	6632-2000-6012	07-07-06	Entitled
11	175 Birch Road	(GEART ST BRANCH)	Riverton	NJ	Riverton Branch	7870484	30-48715172	Z44008	44013001CN	6634-4000-6005	04-05-12	Entitled
12	909 Willow Drive		Springdale	AR	Springdale Branch	7871120	83-45455065	Z44007	44013001CN	2012-2000-6000	08-06-17	Not Entitled

When applying a filter to a column before exporting, the resulting file will contain only the data that matches the applied filter.

Asset List Vuk Krstic

Product ID: 6634-4000-6005

Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
693 Spruce Court	Clifton	VA	Clifton Branch	30-48715171		6634-4000-6005	12/05/2017	Entitled
902 Elm Street	Lakewood	CO	Lakewood Branch	30-44881912	Z44013	6634-4000-6005	07/04/2006	Entitled
169 Sycamore Terrace	Madison	WI	Madison Branch	30-49761423	Z44012	6634-4000-6005	04/06/2008	Entitled
175 Birch Road	Riverton	NJ	Riverton Branch	30-48715172	Z44008	6634-4000-6005	04/05/2012	Entitled

1 20 / page Total: 5 assets

**Export CSV**

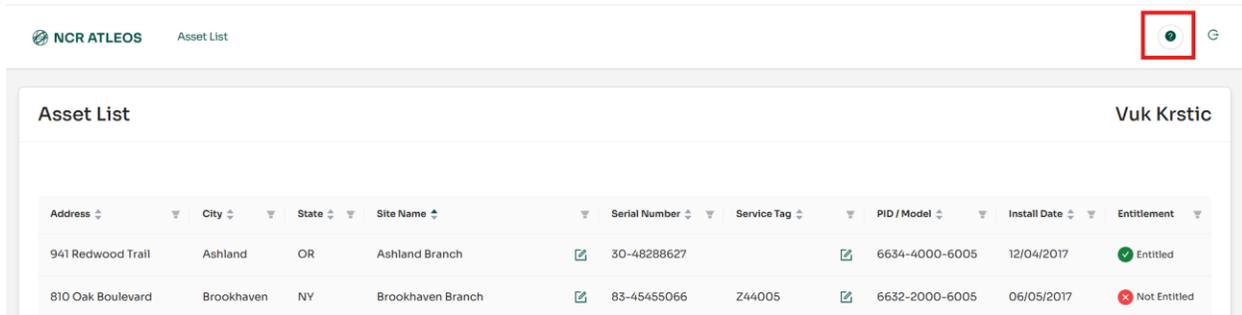
	A	B	C	D	E	F	G	H	I	J	K	L
	Address Line1	Address Line2	City	State	Site Name	Site Number	Serial Number	Service Tag	Customer Number	PID/Model	Install Date	Entitlement
2	941 Redwood Trail		Ashland	OR	Ashland Branch	7668106	30-48288627		44013001CN	6634-4000-6005	12-04-17	Entitled
3	693 Spruce Court	(LAKESIDE BRANCH)	Clifton	VA	Clifton Branch	7870486	30-48715171		44013001CN	6634-4000-6005	12-05-17	Entitled
4	902 Elm Street		Lakewood	CO	Lakewood Branch	6299109	30-44881912	Z44013	44013001CN	6634-4000-6005	07-04-06	Entitled
5	169 Sycamore Terrace		Madison	WI	Madison Branch	8043679	30-49761423	Z44012	44013001CN	6634-4000-6005	04-06-08	Entitled
6	175 Birch Road	(GEART ST BRANCH)	Riverton	NJ	Riverton Branch	7870484	30-48715172	Z44008	44013001CN	6634-4000-6005	04-05-12	Entitled

## Demo Video of Customer View

[NCR Atleos Intelligent Asset Manager Customer Demo](#)

## Help & Feedback

Use the Help button in the app or email [iam.help@ncratleos.com](mailto:iam.help@ncratleos.com)



Address	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Entitlement
941 Redwood Trail	Ashland	OR	Ashland Branch	30-48288627		6634-4000-6005	12/04/2017	Entitled
810 Oak Boulevard	Brookhaven	NY	Brookhaven Branch	83-45455066	Z44005	6632-2000-6005	06/05/2017	Not Entitled

## Future Rollouts Planned

- Personas available to appropriately control access
- Multi-update asset tags & sites
- Service tag workflows / blank & duplicate management
- View the fleet's pricing map
- Notifications for MACC & update activity
- Detailed entitlement view & history
- Asset location history
- Swap/refresh management
- Initiate Asset Move or Cancel
- Initiate Service Add or Cancel
- Customer-defined fields