

NCR Atleos Intelligent Asset Manager Customer User Guide

May 2026

v.1.7.1

IMPORTANT: This is the Customer User Guide.

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

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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

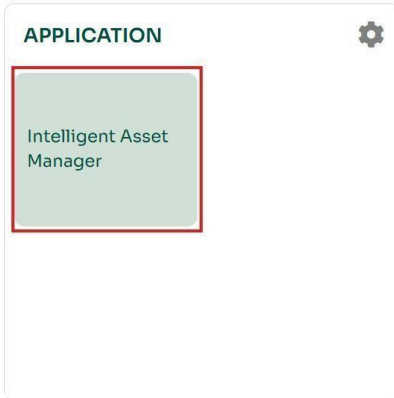
If you do not see Intelligent Asset Manager in the Application portlet, click the gear to request access.

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 side of the navigation bar, there are icons for a globe, a question mark, and the user name Kimberly. Below the navigation bar, there is a secondary navigation bar with links for Dashboard, My Applications (with a dropdown arrow), and Messages. On the far right of this bar is a button labeled 'My Customers'. The main content area features a large yellow banner with the heading 'Security Update Coming in October'. Below the banner, there is a message: 'To enhance account protection, the portal will begin requiring multi-factor authentication (MFA) for all users. Starting in October you will enter your email address associated with your user, create a new password, and verify your identity using a code sent to your email. All future sign-ins will require MFA. Thank you for helping us keep your account secure!'. Below the banner, there are three portlets: 'ORDERS' with filters for Status (All), Range (All Orders (Since Janua)), and Search By (PO Number); 'INVOICE DISPUTES' showing 0 Disputes Awaiting Customer Feedback and 0 Disputes in WIP AT NCR Atleos; and 'APPLICATION' with a gear icon and a message: 'You have not selected any applications yet. Click the gear icon above to add applications to your portlet.'

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

The screenshot shows the 'APPLICATION' portlet. At the top, there is a gear icon. Below it, there is a list of applications. The first application is 'Intelligent Asset Manager', which is selected with a red 'x' in a box. To the right of the application name, there 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 border.

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.



















Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009	2012-2000-6000	03/15/2008	✓
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017	!
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005	04/16/2008	✓
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012	12/13/2008	!
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005	6632-2000-6005	06/15/2017	✓
693 Spruce Court	Clifton	VA	Clifton Branch	98-48715171	DEMO4004	6634-4000-6005	12/15/2017	✓
285 Magnolia Avenue	Milford	CT	Milford Branch	98-45455065	DEMO4007	6632-2000-6005	08/16/2017	✓
895 Chestnut Way	Greenville	SC	Greenville Branch	98-45455064	DEMO4006	6632-2000-6005	05/17/2018	✓
175 Birch Road	Riverton	NJ	Riverton Branch	98-48715172	DEMO4008	6634-4000-6005	04/15/2012	✓
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013	6634-4000-6005	07/04/2006	!
902 Elm Street	Lakewood	CO	Lakewood Branch	98-48288627	DEMO4011	6634-4000-6005	12/14/2017	✓

Export CSV Total assets: 11

Update Site Name


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

Asset List Dragana Jerkovic

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
802 Maple Avenue	Solmaris	CA	Solmaris Branch	 98-48921316	DEMO4009	 2012-2000-6000	03/15/2008	
807 Cedar Lane	Fairview	TX	Fairview Branch	 98-44881918		 6632-2000-6005	12/13/2017	
941 Redwood Trail	Ashland	OR	Ashland Branch	 98-49761423	DEMO4012	 6634-4000-6005	04/16/2008	
169 Sycamore Terrace	Madison	WI	Madison Branch	 98-41402815	DEMO4010	 6632-2000-6012	12/13/2008	
909 Willow Drive	Springdale	AR	Springdale Branch	 98-45455066	DEMO4005	 6632-2000-6005	06/15/2017	
693 Spruce Court	Clifton	VA	Clifton Branch	 98-48715171	DEMO4004	 6634-4000-6005	12/15/2017	

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

Site Name Update

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

Site Name

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

Solmaris Branch Example

Site Name value validated successfully
1 Asset linked with this Site Id will be updated

Note:

add a note

Cancel
Confirm Update

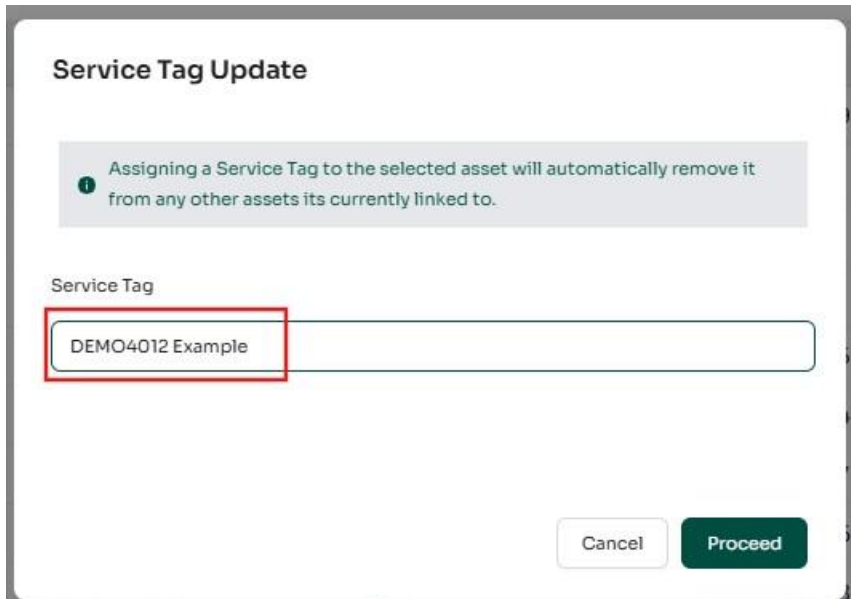
Site updates will be synced to the NCR Atleos Customer Database (NCDM) within 3 business days.

Service Tag (ATM ID) update

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

Asset List										Dragana Jerkovic
Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts		
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009	2012-2000-6000	03/15/2008		✓	
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017		!	
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005	04/16/2008		✓	
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012	12/13/2008		!	
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005	6632-2000-6005	06/15/2017		✓	
693 Spruce Court	Clifton	VA	Clifton Branch	98-48715171	DEMO4004	6634-4000-6005	12/15/2017		✓	
285 Magnolia Avenue	Milford	CT	Milford Branch	98-45455065	DEMO4007	6632-2000-6005	08/16/2017		✓	

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



Service Tag Update

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

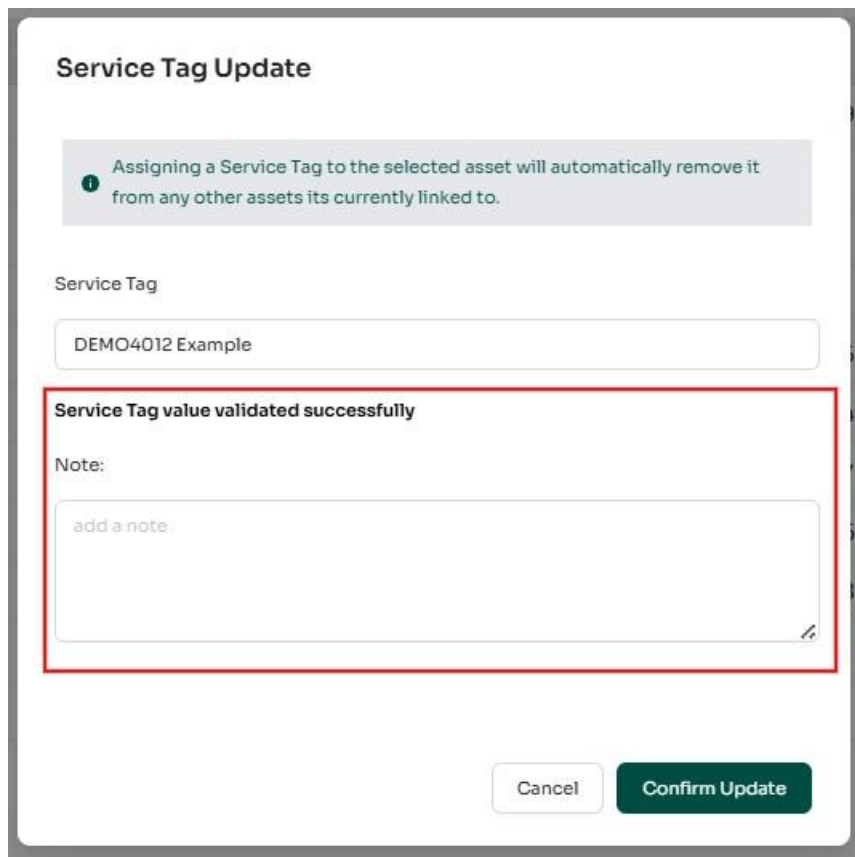
Service Tag

DEMO4012 Example

Cancel Proceed

This screenshot shows a 'Service Tag Update' dialog box. At the top, there is a title 'Service Tag Update' and an information icon followed by a warning message: 'Assigning a Service Tag to the selected asset will automatically remove it from any other assets its currently linked to.' Below this is a text input field labeled 'Service Tag' containing the text 'DEMO4012 Example'. At the bottom right, there are two buttons: 'Cancel' and 'Proceed'.

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



Service Tag Update

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

Service Tag

DEMO4012 Example

Service Tag value validated successfully

Note:

add a note

Cancel Confirm Update

This screenshot shows the same 'Service Tag Update' dialog box, but now it is in a confirmation state. The 'Service Tag' field still contains 'DEMO4012 Example'. Below the field, there is a red-bordered box containing the text 'Service Tag value validated successfully'. Underneath this box is a 'Note:' label and a text area with the placeholder text 'add a note'. At the bottom right, the buttons are now 'Cancel' and '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.

Asset List

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009	2012-2000-6000	03/15/2008
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005	04/16/2008
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012	12/13/2008
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005	6632-2000-6005	06/15/2017

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.

Asset List

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009	2012-2000-6000
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005	6632-2000-6005
693 Spruce Court	Clifton	VA	Clifton Branch	98-48715171	DEMO4004	6634-4000-6005

Click on the X to clear the filter.

Asset List

Site Name: Fairview Branch

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013	6634-4000-6005	07/04/2006

Export CSV Total assets: 2

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

Site Name: Fairview Branch

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918			12/13/20
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013	6632-2000-6005	07/04/2

Export CSV Total assets: 2

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

Asset List

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Site Name: Fairview Branch Product ID: 6632-2000-6005 Clear All

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017	1

Export CSV Total assets: 1

You can also apply partial filter

Asset List

Dragana Jerkovic

Site Name: Ashland

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
941 Redwood Trl	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005	04/16/2008	1

Export CSV Total assets: 1

Sorting

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

Asset List

Click to sort descending

Address Line 1	City	State	Site Name	Serial Number	Service Tag
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918	
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005
693 Spruce Court	Clifton	VA	Clifton Branch	98-48715171	DEMO4004

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

Asset List

Click to sort ascending

Address Line 1	City	State	Site Name	Serial Number	Service Tag
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005
902 Elm Street	Lakewood	CO	Lakewood Branch	98-48288627	DEMO4011
895 Chestnut Way	Greenville	SC	Greenville Branch	98-45455064	DEMO4006
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918	
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013

Clicking on it again cancels the sort.

Asset List

Click to cancel sort

Address Line 1	City	State	Site Name	Serial Number	Service Tag
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010
175 Birch Road	Riverton	NJ	Riverton Branch	98-48715172	DEMO4008
285 Magnolia Avenue	Milford	CT	Milford Branch	98-45455065	DEMO4007
693 Spruce Court	Clifton	VA	Clifton Branch	98-48715171	DEMO4004
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918	
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013

Exporting data

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

NCR ATLEOS IAM
Asset List
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Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012	12/13/2008	1
175 Birch Road	Riverton	NJ	Riverton Branch	98-48715172	DEMO4008	6634-4000-6005	04/15/2012	2
285 Magnolia Avenue	Milford	CT	Milford Branch	98-45455065	DEMO4007	6632-2000-6005	08/16/2017	3
693 Spruce Court	Clifton	VA	Clifton Branch	98-48715171	DEMO4004	6634-4000-6005	12/15/2017	4
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009	2012-2000-6000	03/15/2008	5
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017	6
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013	6634-4000-6005	07/04/2006	7
895 Chestnut Way	Greenville	SC	Greenville Branch	98-45455064	DEMO4006	6632-2000-6005	05/17/2018	8
902 Elm Street	Lakewood	CO	Lakewood Branch	98-48288627	DEMO4011	6634-4000-6005	12/14/2017	9
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005	6632-2000-6005	06/15/2017	10
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005	04/16/2008	11

Export CSV
Total assets: 11

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	Service Contracts
1	169 Sycamore Terrace		Madison	WI	Madison Branch	DEMO83131	98-41402815	DEMO4010	10135722	6632-2000-6012	12/13/2008	Review Entitlements
2	175 Birch Road	(GEART ST BRANCH)	Riverton	NJ	Riverton Branch	DEMO82082	98-48715172	DEMO4008	10135722	6634-4000-6005	4/15/2012	Entitled
3	285 Magnolia Avenue	SFO ADMIN BUILDING	Milford	CT	Milford Branch	DEMO23178	98-45455065	DEMO4007	10135722	6632-2000-6005	8/16/2017	Entitled
4	693 Spruce Court	(LAKESIDE BRANCH)	Clifton	VA	Clifton Branch	DEMO26673	98-48715171	DEMO4004	10135722	6634-4000-6005	12/15/2017	Entitled
5	802 Maple Avenue		Solmaris	CA	Solmaris Branch	DEMO99692	98-48921316	DEMO4009	10135722	2012-2000-6000	3/15/2008	Entitled
6	807 Cedar Lane		Fairview	TX	Fairview Branch	DEMO63020	98-44881918		10135722	6632-2000-6005	12/13/2017	Review Entitlements
7	807 Cedar Lane		Fairview	TX	Fairview Branch	DEMO63020	98-44881912	DEMO4013	10135722	6634-4000-6005	7/4/2006	Review Entitlements
8	895 Chestnut Way		Greenville	SC	Greenville Branch	DEMO10536	98-45455064	DEMO4006	10135722	6632-2000-6005	5/17/2018	Entitled
9	902 Elm Street		Lakewood	CO	Lakewood Branch	DEMO72992	98-48288627	DEMO4011	10135722	6634-4000-6005	12/14/2017	Entitled
10	909 Willow Drive		Springdale	AR	Springdale Branch	DEMO20331	98-45455066	DEMO4005	10135722	6632-2000-6005	6/15/2017	Entitled
11	941 Redwood Trail		Ashland	OR	Ashland Branch	DEMO72966	98-49761423	DEMO4012	10135722	6634-4000-6005	4/16/2008	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 Dragana Jerkovic

State: WI

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012	12/13/2008	1

Export CSV Total assets: 1

Exported data

H13

	A	B	C	D	E	F	G	H	I	J	K	L
1	Address Line1	Address Line2	City	State	Site Name	Site Number	Serial Number	Service Tag	Customer Number	PID/Model	Install Date	Service Contracts
2	169 Sycamore Terrace		Madison	WI	Madison Branch	DEMO83131	98-41402815	DEMO4010	10135722	6632-2000-6012	12/13/2008	Review Entitlements
3												
4												

Help & Feedback

Use the Help button in the app or email iam.help@ncratleos.com

NCR ATLEOS IAM **Asset List** Dragana Jerkovic

Asset List

Address Line 1	City	State	Site Name	Serial Number	Service Tag	PID / Model	Install Date	Service Contracts
169 Sycamore Terrace	Madison	WI	Madison Branch	98-41402815	DEMO4010	6632-2000-6012	12/13/2008	1
175 Birch Road	Riverton	NJ	Riverton Branch	98-48715172	DEMO4008	6634-4000-6005	04/15/2012	2
285 Magnolia Avenue	Millford	CT	Millford Branch	98-45455065	DEMO4007	6632-2000-6005	08/16/2017	3
693 Spruce Court	Clifton	VA	Clifton Branch	98-48719171	DEMO4004	6634-4000-6005	12/15/2017	4
802 Maple Avenue	Solmaris	CA	Solmaris Branch	98-48921316	DEMO4009	2012-2000-6000	03/15/2008	5
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881918		6632-2000-6005	12/13/2017	6
807 Cedar Lane	Fairview	TX	Fairview Branch	98-44881912	DEMO4013	6634-4000-6005	07/04/2006	7
896 Chestnut Way	Greenville	SC	Greenville Branch	98-45455064	DEMO4006	6632-2000-6005	05/17/2018	8
902 Elm Street	Lakewood	CO	Lakewood Branch	98-48288627	DEMO4011	6634-4000-6005	12/14/2017	9
909 Willow Drive	Springdale	AR	Springdale Branch	98-45455066	DEMO4005	6632-2000-6005	06/15/2017	10
941 Redwood Trail	Ashland	OR	Ashland Branch	98-49761423	DEMO4012	6634-4000-6005	04/16/2008	11

Export CSV Total assets: 11

Need Help or Report an Issue?

- Data Discrepancies
- Feedback and Suggestions
- Bug

Help

Log out

v1.71

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