



MyNCR Atleos Getting Started Guide

A SECURE CUSTOMER PORTAL EMPOWERING YOU TO
TRANSACTION WITH NCR ANYTIME, ANYWHERE.

For more information, visit ncratleos.com, or email MyNCR.Administrator@ncratleos.com.

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ACCESS AND MANAGE NCR ACCOUNT INFORMATION

MyNCR is a customer portal empowering you to transact with NCR anytime, anywhere. With access to real-time information, reporting capabilities and account management, MyNCR makes it easier to do business with NCR.

MyNCR capabilities include:

- View, Download and Print Invoice and Order Details
- Electronically Dispute Invoices
- Submit and View Service Requests
- View Status of Assets on Maintenance
- Access Business Relevant NCR Applications in a Centralized Location
- Self-Management of Users

Instance access to account information

User MyNCR to access and manage all of your NCR accounts. Search, download, view and print invoices and order details. Manage service request and access relevant business applications in MyNCR.

One-Stop-Shop

MyNCR provides you with a centralized access point for managing business operations with NCR. Access to real-time account information, reporting capabilities and self-service feature are available in MyNCR.

Reduce cycle time

MyNCR empower you with immediate access to account information, reporting capabilities and self-service features that promote faster turn-around. You can access all of your account details, place service requests and submit invoice disputes at anytime in MyNCR.

MyNCR CAPABILITIES & FUNCTIONALITIES

Invoice Management: From the MyNCR dashboard you can see and control an interactive pie chart view of paid, past due and upcoming invoices. Access MyNCR Invoice page to search, view, download, print or dispute invoices online.

Invoice Dispute Management: View a quick glance status update of dispute that are open and any awaiting your feedback. Access the MyNCR Invoice Dispute page for summary details on all invoice disputes.

Order Reporting Management: The MyNCR Orders page allows you to search, view, download and print order reports. Access specific orders to view product details, status and shipping information.

Assets Management Access: With approved access to NCR's Asset Management site, MACC, you can view the status of entitlements, annuities and warranties as well as navigate to the MACC site to manage NCR assets.

Incident Management Access: MyNCR provides a gateway to NCR's online system for managing incidents and service request. With approved access to My Support Link you can view, create and manage service requests, access the knowledge repository and more depending upon your line of business.

NCR Applications Access: Access all of your NCR applications in one place with MyNCR Applications. MyNCR provides an Application portlet that can navigate you to all of your approved NCR business relevant applications with one click.

Self-Management of Users: MyNCR offers two different user roles that allow companies to manage their own users, including adding new users, resetting passwords, deleting users and managing user's access and permission to information.

KEY FEATURES

- Modern, interactive design
- Access to real-time account information
- Invoice and order reporting capabilities
- View, download, print reports for invoices and orders
- Submit invoice disputes, access disputes and dispute summary details
- Gateway to Asset and Incident Management (My Support Link)
- Navigate to a collection of NCR applications
- Imbedded training, help and support
- User role designation: Admin or User
- User role permission settings
- Self-Management of users for Admins
 - Create new users
 - Delete users
 - Reset passwords
 - Manage User permission

MyNCR OVERVIEW

MyNCR is a central interface empowering customers to transact with NCR anytime, anywhere. With access to real-time information, reporting capabilities and account management, MyNCR makes it easier to do business with NCR.

MyNCR allows customers to:

- View, Download and Print Invoices and Orders
- Electronically Dispute Invoices
- Submit and View Service Requests
- View Status of Assets on Maintenance
- Access Business Relevant NCR Applications in a Centralized Location
- Self-Manage Users

MyNCR USER ROLES

MyNCR Customer Administrator

MyNCR requires at least one designated Customer Administrator who has access to all MyNCR features, at the enterprise level, and is responsible for:

- Managing the company profile
- Creating and managing customer users
- Requesting application access

MyNCR Customer User

The MyNCR Customer User is a general user who can view, manage and interact with MyNCR depending upon user permissions granted by the Customer Administrator.



MyNCR DASHBOARD

The MyNCR Dashboard is the homepage of MyNCR. It is comprised of:

- **NCR Brand Block**
Access to the MyNCR homepage at anytime
- **Portlet Boxes**
Interactive, rearrangeable information boxes
- **Navigation Bar**
Alternative access to portlet pages
- **Customer Name**
Access to profile settings
- **Toolbar**
Access to quick functions like our Training Center
- **Portlet Gear**
Displays settings available for select portlets
- **Portlet Expand**
Displays drop-down views for select portlets
- **Portlet Page Access**
Navigates to portlet page for select portlets

1. Toolbar

The toolbar is available on all pages. It offers you quick functions like page tutorials, saving customized pages, providing help and access to customers.

2. Portlets

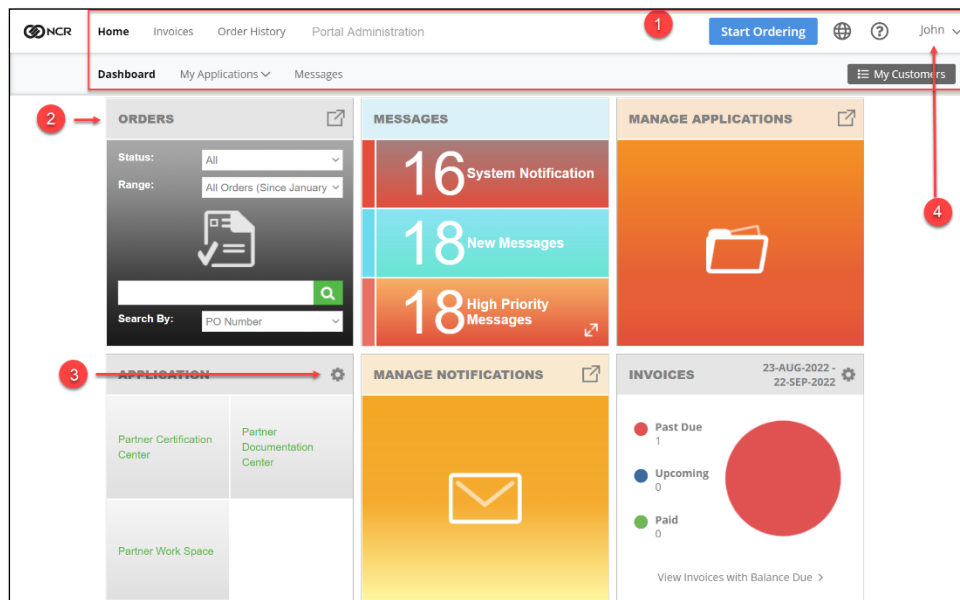
These are your portlets. They are interactive, rearrangeable boxes on your dashboard which help you navigate to where you're trying to go in MyNCR. Here are your portlets: Manage Customers, Manage Users, Messages, Invoices, Application.

3. Settings

On several portlets you will see a gear. The gear offers access to different options within a portlet. For example, in the Invoices portlet, the gear allows you to select the date range displayed on the pie chart.

4. Profile

This identifies you as the user and if you click on your name, it will take you to your profile that shows information unique to you, such as username, role, email as well as shows the customers you are linked to and the application you have access to.



MyNCR SEARCHES

Select portlet pages allow basic and advance search options as well as features to customize and filter search results. Search criteria can also be saved for quick access to specified search terms.

PERFORM A SEARCH

Basic Search

General search across all search terms.

Advanced Search

Click to access advanced search terms.

Advanced Search			
Master Customer Name	Master Customer Number	Order Number	Bill to Location
Currency Code	Customer Delivery Partner	Customer PO	Customer PO Date
Date Ordered	FUA Site Name	Implementation Specialist	Invoice Criteria
Invoice Type	Order Hold	Order Source	Order Source Reference
Order Status	Order Type	Payment Terms	Quote Number
Ship to Location	Ship To Site Name	Requested Delivery Date	Arrival Date

☐ Search only My Customers
☐ Include orders older than 2 years

Cancel Search

Select and Search

Select term and enter criteria to search.

Advanced Search Terms

Display of advanced search terms.

SEARCH RESULTS

Saved Search

Saved searches will display here

Filters

Each column can be filtered to narrow results

Search Terms

View advanced search terms

Refine Results

Add additional search refining criteria

Order Number	Customer PO	Date Ordered	Requested Delivery Date	Arrival Date	Order Status	Subtotal	Ship To Location
12345	12345	25-MAR-2022	25-MAR-2022	00-MAR-2022	IN PROCESS	12,345.00	12345
12345	12345	25-MAR-2022	25-MAR-2022	00-MAR-2022	IN PROCESS	12,345.00	12345
12345	12345	25-MAR-2022	25-MAR-2022	00-MAR-2022	IN PROCESS	12,345.00	12345

MyNCR CUSTOMER ADMINISTRATOR GUIDE

SEARCHING, EDITING, MANAGING & CLONING USERS

Search Users

General search across all search terms.

Advanced Search

Click to access advanced search terms.

The screenshot displays the 'Manage Users' interface. At the top, there is a green header bar with a 'Search Users' input field and a magnifying glass icon. To the right of the header is a green button labeled 'ADVANCED SEARCH' with a right-pointing arrow. Below the header, the main content area is titled 'Manage Users' and includes two buttons: 'CREATE NEW USER' and 'CLONE USER'. A 'Saved Searches' dropdown menu is visible, and a 'CLOSE ALL TABS' button is on the right. A dark grey button labeled 'USERS' is on the left, and a pagination control shows '< 1 >'. Below this, it states '373 Results' and provides a 'Refine these results' input field with a 'Go' button. A timestamp indicates 'Last updated: Friday, May 20, 2022 18:22' with a refresh icon. A toolbar with icons for various actions is located above the table. The table itself has columns for Username/QLID, Last Name, First Name, Email Address, Office Phone Number, User Role, Last Login Date, and User Country. Three test users are listed.

Username/QLID	Last Name	First Name	Email Address	Office Phone Number	User Role	Last Login Date	User Country
☐ TestUser1	Doe	John	John.doe@test.com		Customer User	01-Jan-2022	UNITED STATES
☐ TestUser2	Doe	Jane	Jane.doe@test.com	4045555555	Customer Admin	01-Jan-2022	UNITED STATES
☐ TestUser3	Doe	John	John.doe@test3.com	4045555555	Customer User	01-Jan-2022	UNITED STATES

Click the **Hyperlinked Username** to on the Manage Users page to **Access User Profile**. This will take you to the user's profile where you can:

- Edit Profile
- Link/Unlink Customers
- Manage Permissions
- Manage Applications
- Disable/Enable User
- Reset Password

MyNCR TERMINOLOGY AND ICONS

Throughout MyNCR there are key terms and icons used to navigate the user to information, functions and features.

TERMINOLOGY

Applications: Tools or resources that are related to the user's line of business with NCR. Applications are an optional feature, and not all users require applications.

Customers: A broad terminology referring to NCR customers' accounts. All NCR customers are part of an entity and enterprise. Depending upon the company's structure there can be several customers in an entity or enterprise.

Enterprise: The highest identifier for a company that encompasses the company as a whole.

Entity: A group of customers or divisions. Depending upon the company's structure there can be one or multiple entities within an enterprise.

Linked: When a user is connected to a customer, entity, or enterprise and has access to the information. Depending upon a user's position, they can be linked at a customer (lowest), entity or enterprise (highest) level. This function is controlled by the Customer Administrator.

Unlinked: When a user is not connected to a customer, entity or enterprise and does not have access to the information. This function is controlled by the Customer Administrator.

ALL PAGES

 My Customers

MY CUSTOMERS

Displays a pop-out menu of all customers associated with the user.



LANGUAGES

Displays a pop-out menu with list of available languages the user can select their preferred language from.



SAVE CUSTOMIZED PAGE

Saves changes made to a page for later use.



HELP

Displays a pop-out menu with links to instructional videos and NCR contact information.

DASHBOARD

 Sign Out

SIGN OUT

Logs the user out of MyNCR.



EXPAND

Displays a drop-down quick view of the portlet.



GO TO PORTLET

Navigates to the portlet page.



SETTINGS

Displays various options available for a portlet.

PORTLET



SEARCH

Explores the portlet for the information being searched for.



ADD/REMOVE COLUMNS

Adds or removes columns from search results.



DOWNLOAD

Exports search results.

CREATE NEW USER

CREATE NEW USER

Creates a new user in the portlet.



ENABLE USER

Allows a user access to MyNCR.



DISABLE USER

Disallows a user access to MyNCR.



DELETE MESSAGE

Removes a message from the Messages portlet.

ADVANCED SEARCH

ADVANCED SEARCH

Allows a user to search for multiple specific criteria.

CLONE USER

CLONE USER

Allows an admin to replicate an existing user.

CLOSE ALL TABS

CLOSE ALL TABS

Allows the user to close all tabs at once instead of one at a time.



CLEAR ALL FILTERS

Allows users to clear all filters when working with the columns.



FILTER

Sorts search results by the field listed next to the icon.



REFRESH

Reloads the most up-to-date search results.



VIEW INVOICES

Displays the invoices selected.

 Dispute

DISPUTE INVOICES

Displays a window to question an invoice.