Customer Portal Customer Admin Welcome Guide

For more information, visit ncrvoyix.com, or email customerportal.admin@ncrvoyix.com

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INTRODUCTION

Customer Portal is NCR VOYIX's Customer portal that gives you immediate access to account information and the ability to transact, digitally, with NCR VOYIX.

FEATURES & CAPABILITIES

Customer Portal provides NCR VOYIX customers with account management capabilities which include:

- User Management
- Invoices
- Invoice disputes
- Order history
- Application Access: Entry point into to numerous secured NCR VOYIX sites such as My Support Link (NCR@YourService)

USER ROLES AND LEVEL OF ACCESS

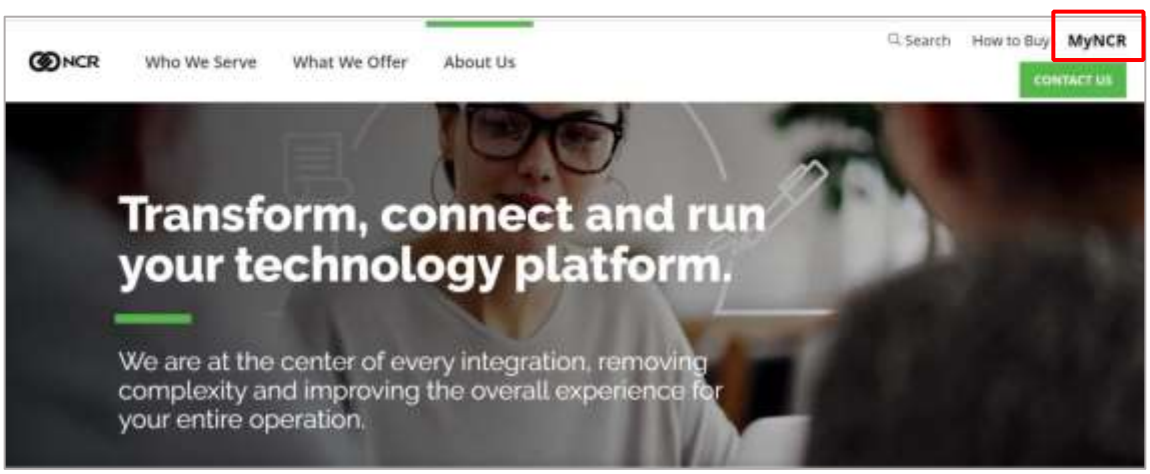
Customer Portal offers two types of Customer roles. Your user role can be found in your profile page.

- Customer Admins have access to all features and capabilities and are responsible for creating new users, managing users, requesting applications for users and deleting users for their organization.
- Customer Users, by default, do not have access to features, capabilities or user management. The Customer Admin is responsible creating, managing permissions and requesting application access for Customer Users.

LOG IN, NAVIGATION, AND PROFILE

LOGGING IN

Step 1 To access your Customer Portal account, go to NCR Voyix.com and click on the "Customer Portal" text in the upper right-hand corner of the page.

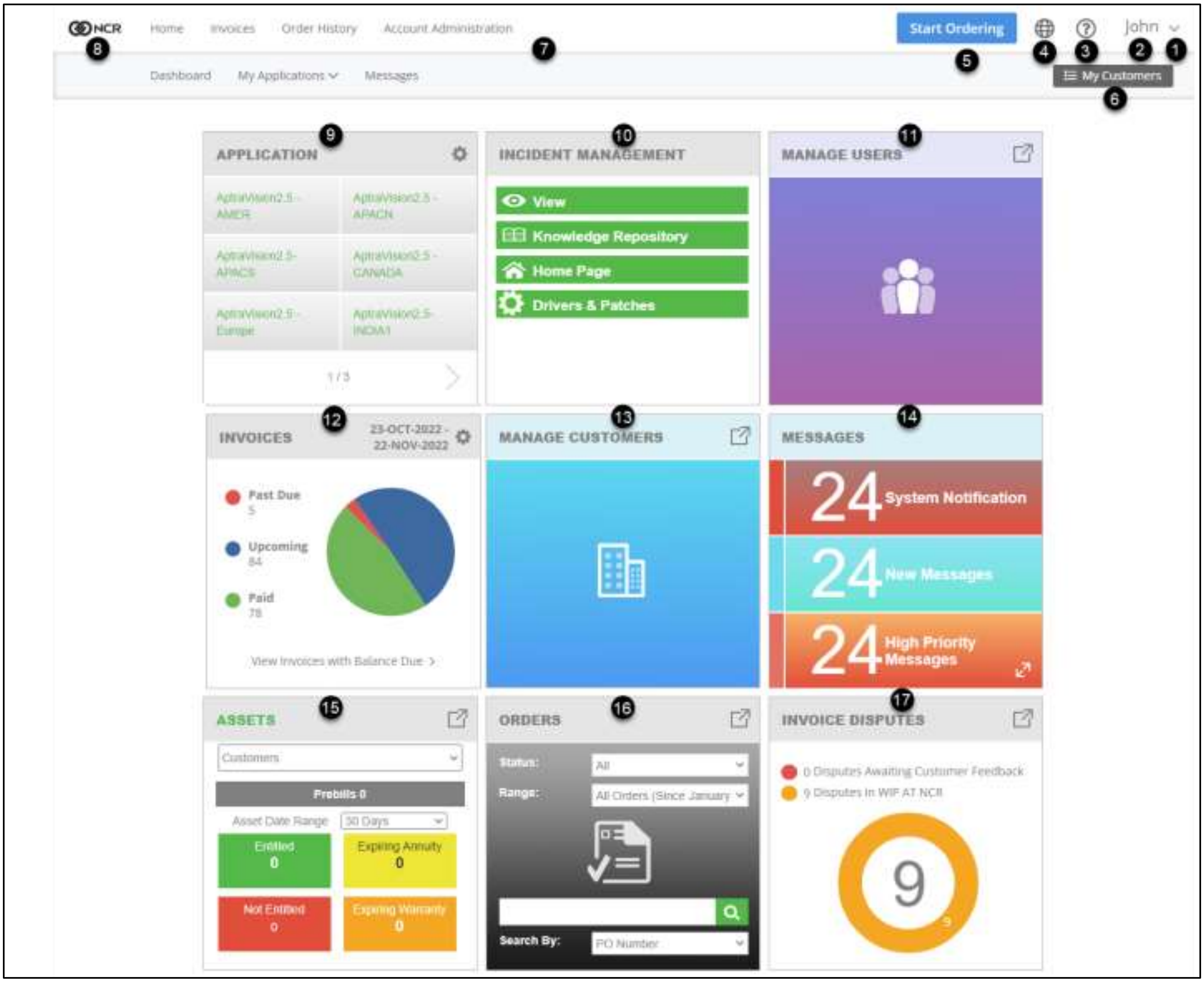


Step 2 On the login page, enter your Username and Password; Then click "Log in".

NOTE: Your username is not your email address. If you have forgotten your username, use the options to retrieve your username and/or reset your password.


SIGN IN
User Name
Password
Remember me
LOG IN
Forgot Username
Forgot Password
Don't have an account?

CUSTOMER PORTAL HOMEPAGE



NUMBER	DESCRIPTION
1	Profile Drop Down: Click here to view your proxy profiles and sign out
2	"Your Name": Click here to open your profile page.
3	"Help" button: Click here for quick links to training, a help center and Customer Portal support information.
4	"Language Preference" button: Click here to change your language preferences.
5	"Start Ordering" button: Click here to select an MCN you want to begin an order for.

6 “My Customers” button: Click here to display the NCR VOYIX Master Customer Numbers to which you have access.

7 Header: Click here to access Customer Portal features and capabilities. (Access is also available by using the “Designated Portlets” option)

8 “Home” button: Click here to navigate back to the homepage at any time.

9 “Application” Portlet: A list of available applications that will navigate you to application sites.

10 “Incident Management” Portlet: An application that has its own portlet that provides quick links to the My Support Link (NCR@YourService) site for managing service calls.

11 “Manage Users” Portlet: Navigates you to the Manage Users page.

12 “Invoices” Portlet: Shows a pie chart view of invoices and navigates you to the Invoice page.

13 “Manage Customers” Portlet: Navigates you to the Manage Customers page.

14 “Messages” Portlet: Display of system related emails that navigates to the messages page.

15 “Assets” Portlet: An application that has its own portlet that provides information related to prebills, entitlements, annuities, warranties and navigates to the Move Add Change Cancel (MACC) site.

16 “Orders” Portlet: Provides quick ways to search for an order and navigates you to the Orders page.

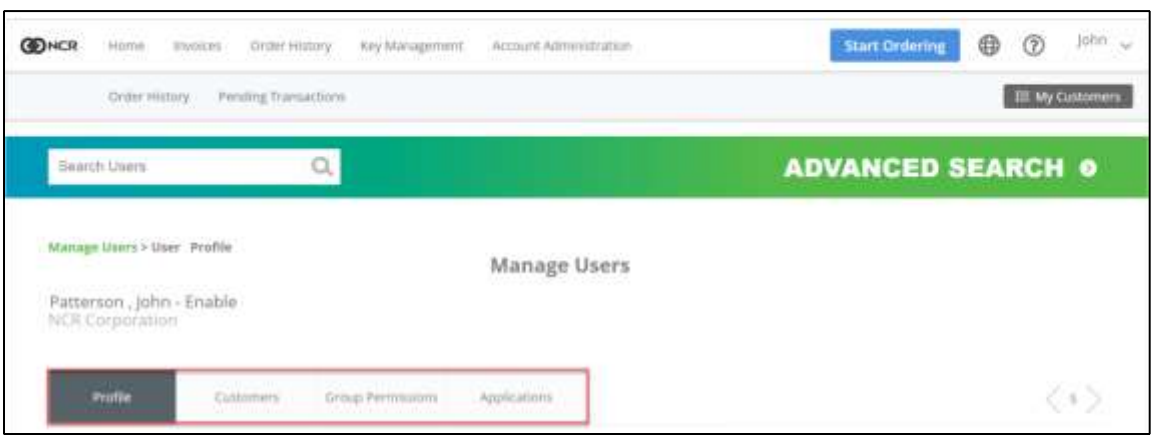
17 “Invoice Disputes” Portlet: Displays a quick status of invoice disputes that are open and navigates you to the Invoice Dispute page.

MANAGING YOUR PROFILE

Step 1 Access your profile page by clicking on your name in the top right of the page.

Step 2 Within your profile page, you will see the following tabs for the sections you can view and manage:

Profile, Customers, Group Permissions, and Applications.

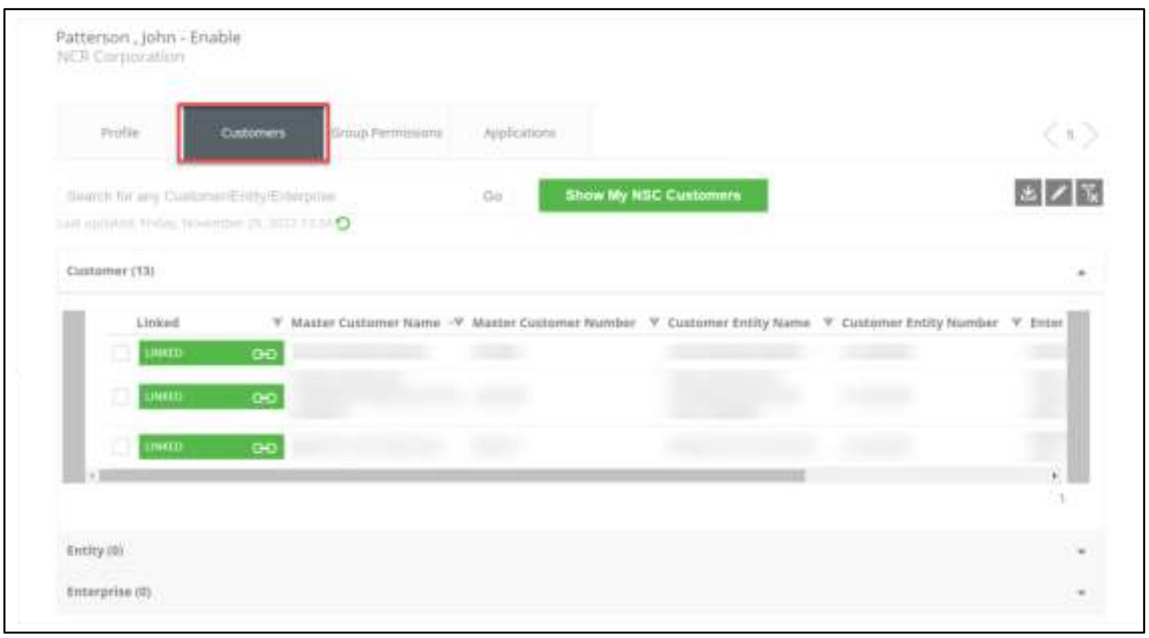


Step 3 Profile Tab

In the Profile tab, you can edit profile details by clicking on the "Edit User Profile" button, making the changes, then clicking "Save". You can also click on "Change Password" to change your password at any time.

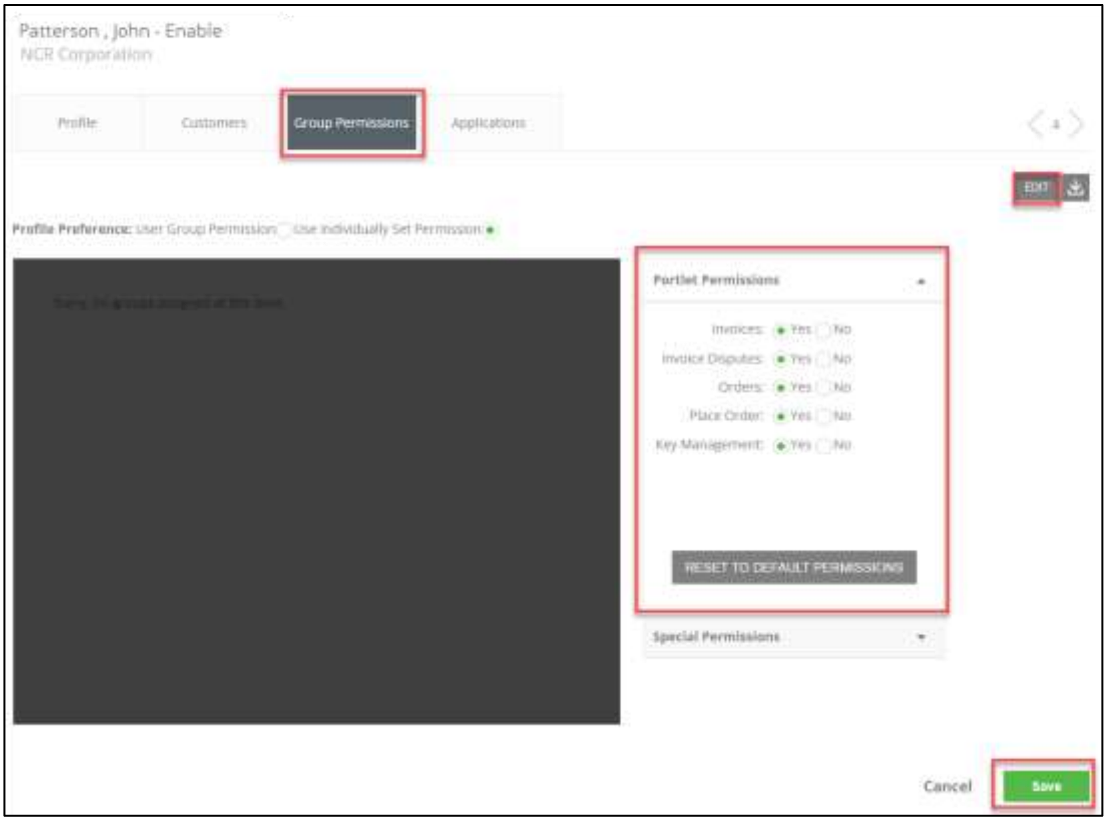
Step 4 Customers Tab

In the Customers tab you will see a list of NCR VOYIX Master Customer Numbers to which you are linked and have access.



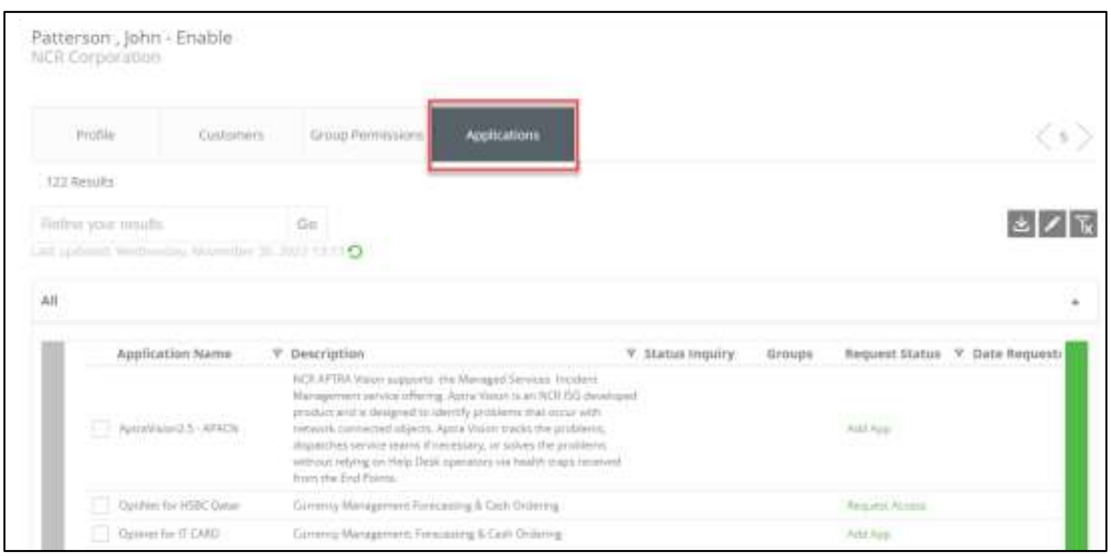
Step 5 Group Permissions Tab

In the Group Permissions tab you can turn off your access to certain portlets by clicking the Edit button, changing the radio buttons, then clicking Save.



Step 6 Applications Tab

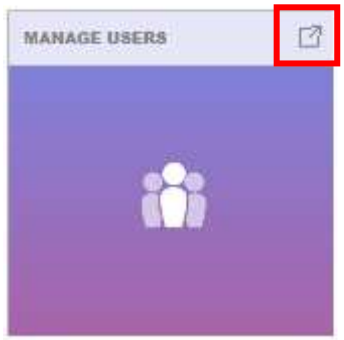
The Applications tab will show a list of applications that are available for use and list any others that are available to request, if applicable.



USER MANAGEMENT

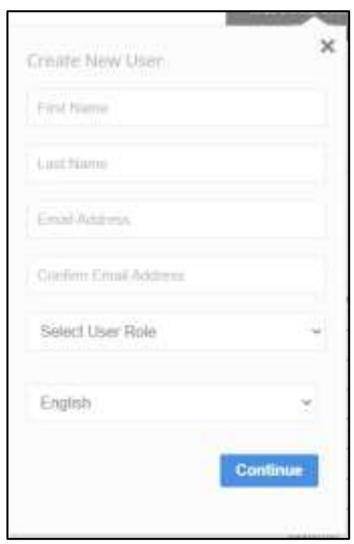
CREATING NEW USERS

Step 1 From the Customer Portal homepage, access the Manage Users page by clicking on the “Expand” button, or by clicking anywhere within the purple space.



Step 2 From the Manage Users page, click on the Create New User button.

Step 3 Complete the pop-up form for the new user, and then click Continue.



NOTE: During this process, under "Select User Role", you will choose whether the new user will be a Customer Admin or Customer User. If you select "Admin", the new user will have full access to all Customer Portal's features, and the ability to manage other users. Use this access carefully and only grant this to people in your organization that will managing this site for you or with you. If you select "User" you will grant the new user's permissions later, and they will not be able to manage other users.

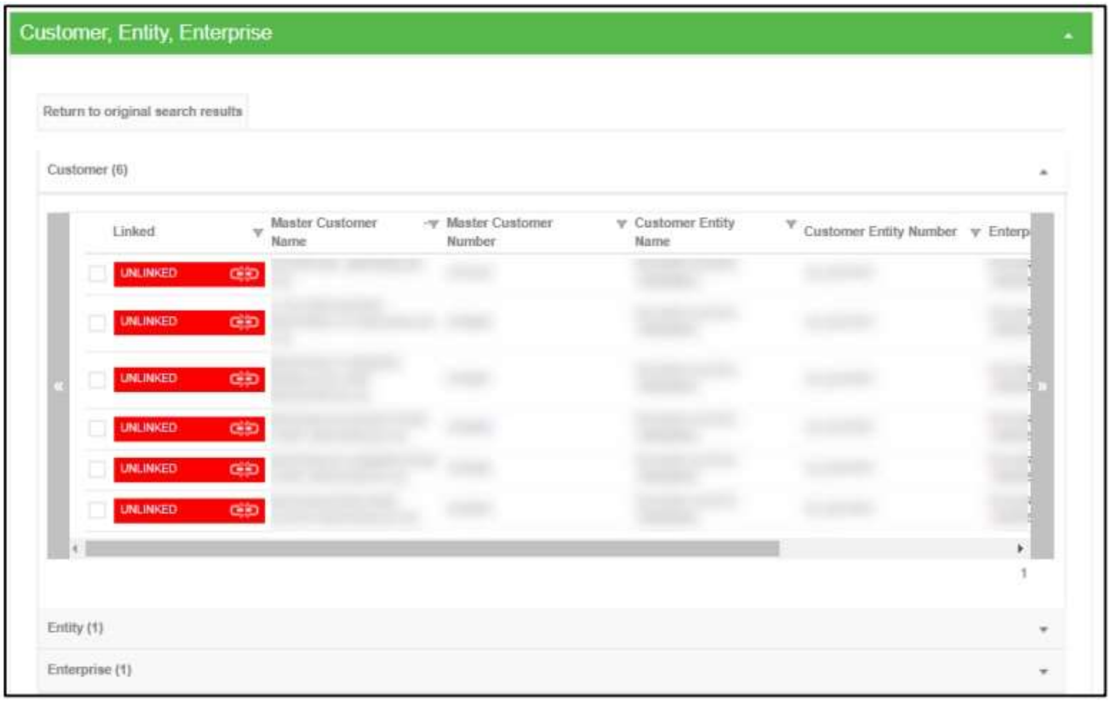
Step 4 On the next page, you will complete the new user creation process. First, assign the new user a username. Usernames must contain at least 6 alphanumeric characters, at least 1 number, and no special characters. NOTE: The username cannot be changed later

Step 5 Second, you will link the user to the NCR VOYIX accounts to which they require access. The user can be linked at three levels: Customer, Entity or Enterprise.

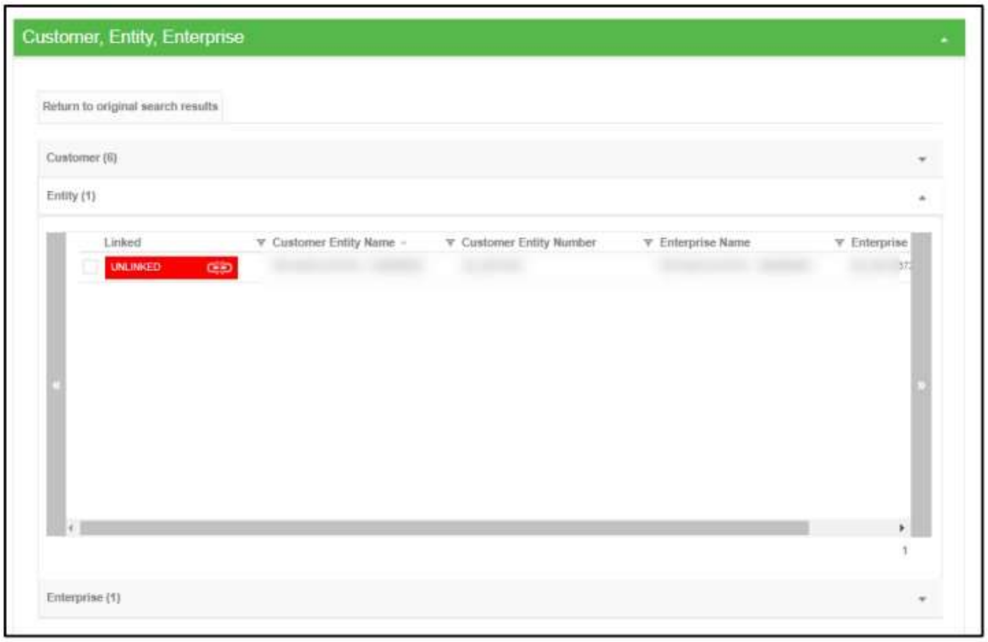
- The Customer level relates to NCR VOYIX Master Customer numbers.
- The Entity level is a group of NCR VOYIX Master Customer Numbers.
- The Enterprise level is the highest identifier and includes all NCR VOYIX Master Customer Numbers and Entities for your organization.

NOTE: Each organization may have a different amount of NCR VOYIX Master Customer or Entity Numbers depending upon the organizational structure.

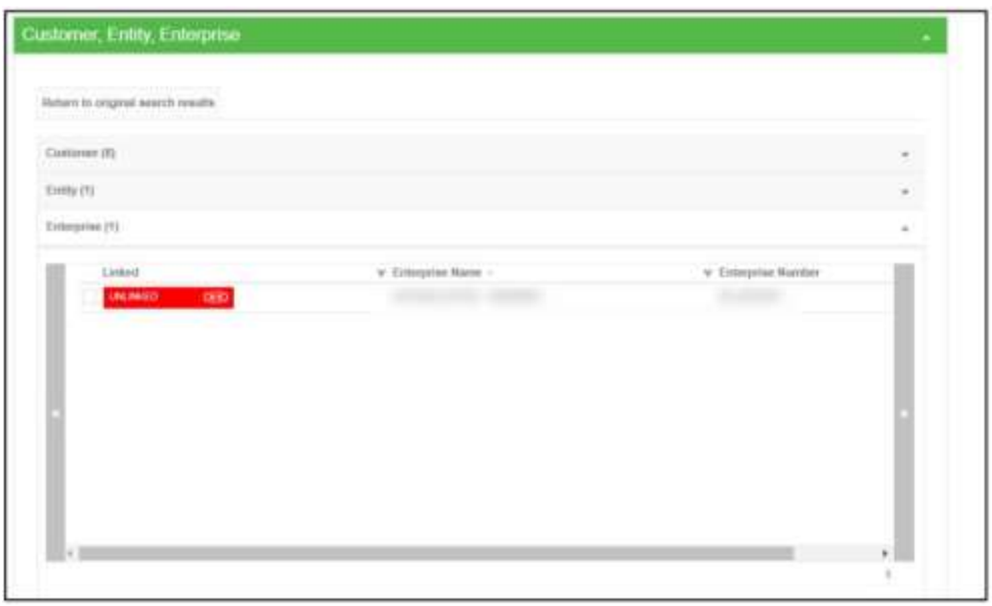
To link the user at the Customer level, click the red "UNLINKED" buttons to change them to green "LINKED" buttons for each NCR VOYIX Master Customer number to which the user needs access



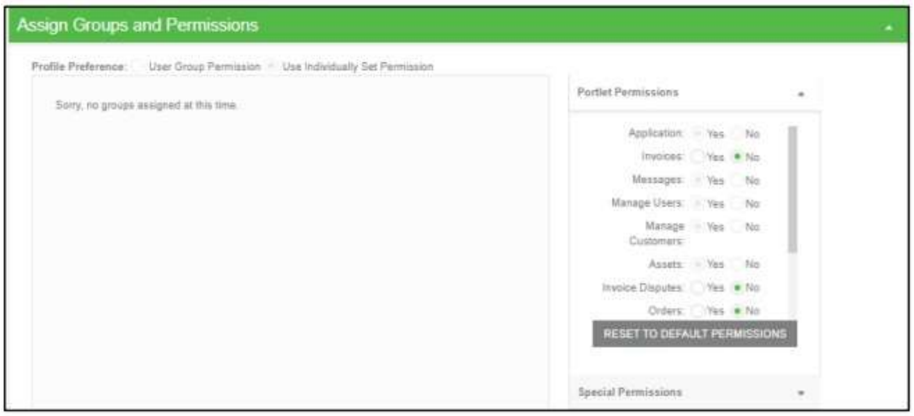
To link the user at the Entity level, click on the "Entity" section then click the red UNLINKED buttons to change them to green LINKED buttons for each Entity to which the user needs access. This will give the user access to all the NCR VOYIX Master Customer Numbers which are associated with that Entity



To link the user at the Enterprise level, click on the “Enterprise” section, then click on the red UNLINKED button to change it to a green LINKED button. This will give the user access to all the NCR VOYIX Master Customer Numbers for your organization.

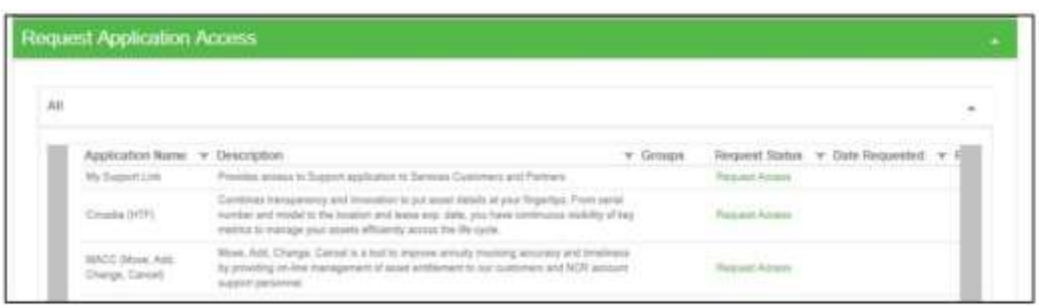


Step 6 Next, under "Assign Groups and Permissions" you will grant permissions to your new user. You can grant permission to Invoices, Invoice Disputes or Orders, all of which are set at "no" by default for Customer Users. Anything you change to "yes" will allow the user to have full access to the functionality of that portlet.

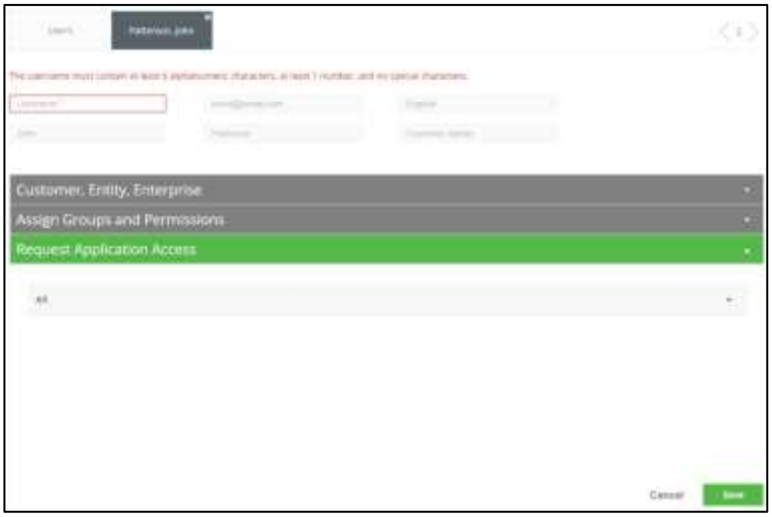


NOTE: If you are creating a New User that you labeled as Customer Admin, these portlet permissions will be set to "yes" by default. You can set them to "no", but Customer Admin users can turn permissions back to "yes" within their own profile.

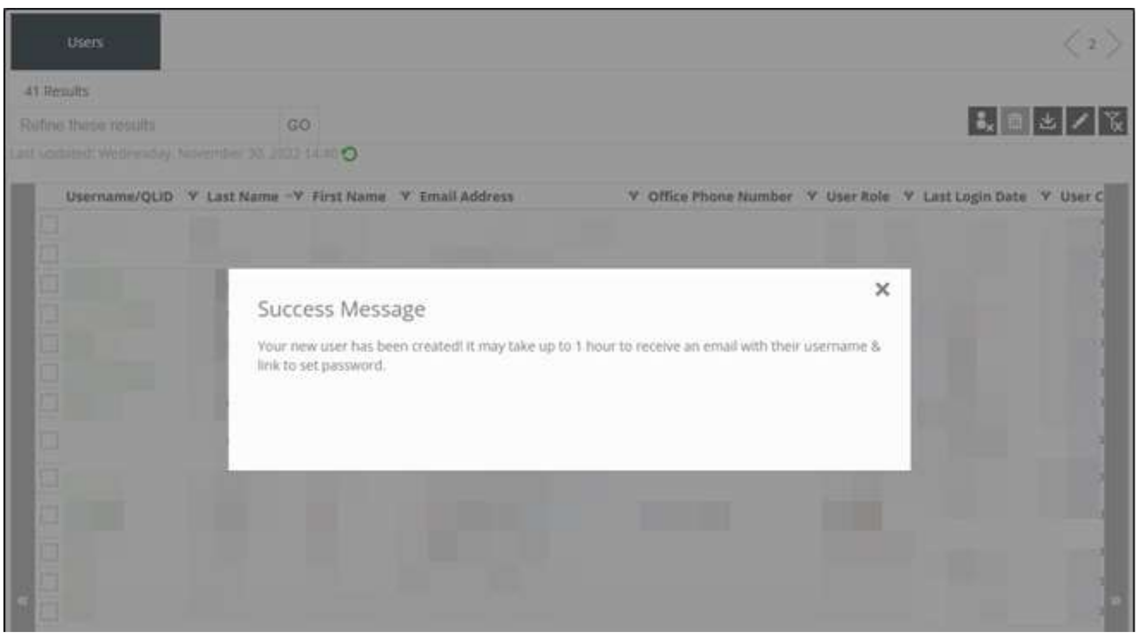
Step 7 Next, under "Request Application Access", you can decide if which applications to request for this new user. Any application that is assigned to the Master Customer Number to which the user is link will populate for you to request access.



Step 8 After you have completed all the information for the new user, click the Save button.



Step 9 Once you have completed these steps, a success message will pop up notifying you that the new user has been created. The user will then receive an automated email with their login credentials, which includes their username and a temporary password.



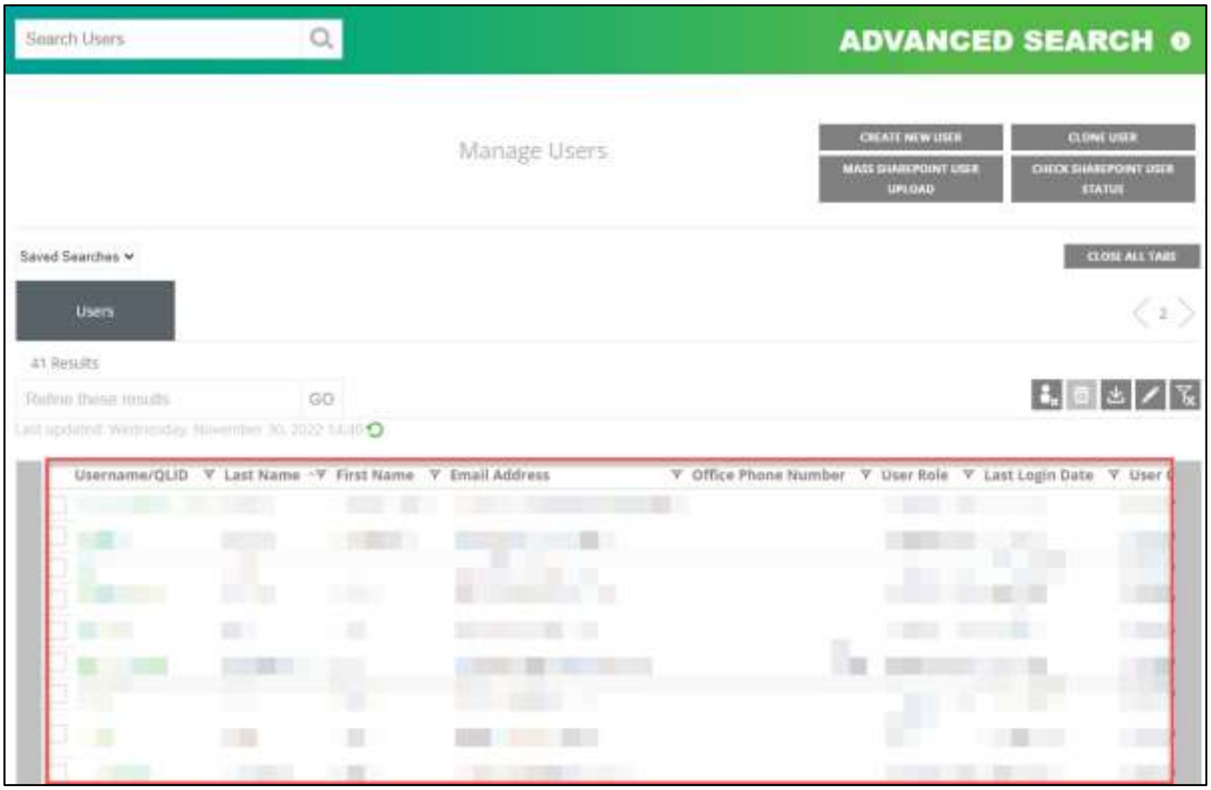
NOTE: The temporary password is valid for 7 days. You can always send a new temporary password within the user's profile page.

MANAGING USERS

Step 1 From the Customer Portal homepage, access the Manage Users page by clicking on the "Expand" button, or by clicking anywhere within the purple space.

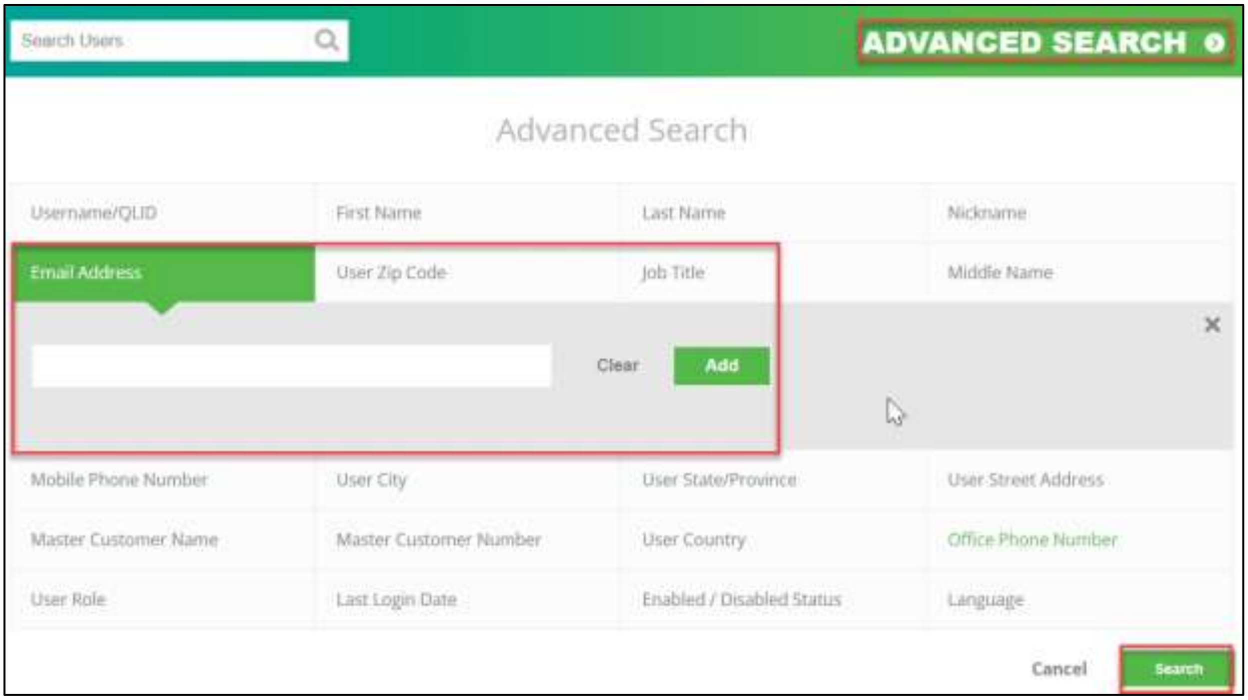
Step 2 The Manage Users page will display a report of Users from your organization. The report is interactive and allows you to move and filter columns. You can also use the buttons to the top right of the report to:

1. Disable users
2. Delete users
3. Download the report
4. Edit columns
5. Clear filters

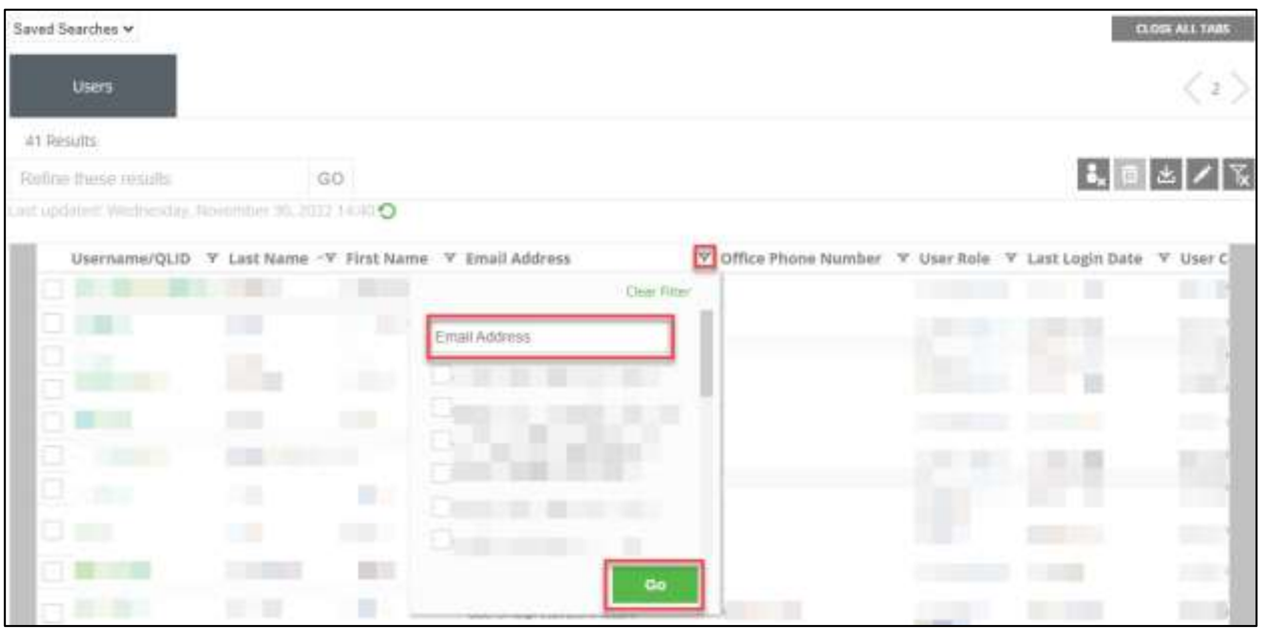


Step 3 There are two ways that you can search for users:

Option 1: Click on Advanced Search button, enter a search term, then click Search.

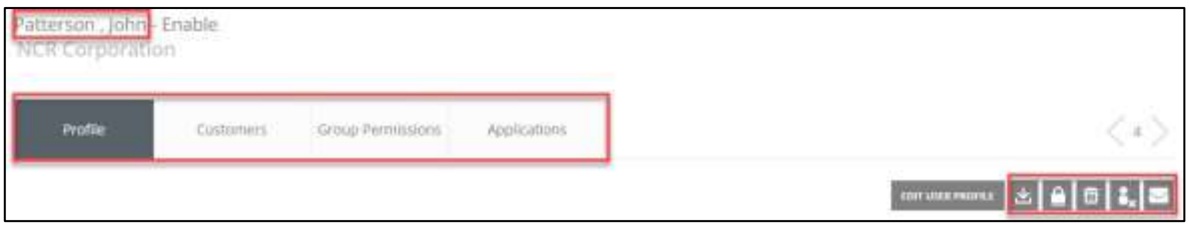


Option 2: Click on the Filter button next to any column you wish to use for searching, enter the search criteria, then click Go.



Step
4 Once you have found the user, click on the green username to open the user's profile page.

Step 5 In the user's profile page, you will see their name in the top left, and buttons to either reset password, delete or disable the user. You will also see tabs for the following manageable sections: Profile, Customers, Group Permissions and Applications.

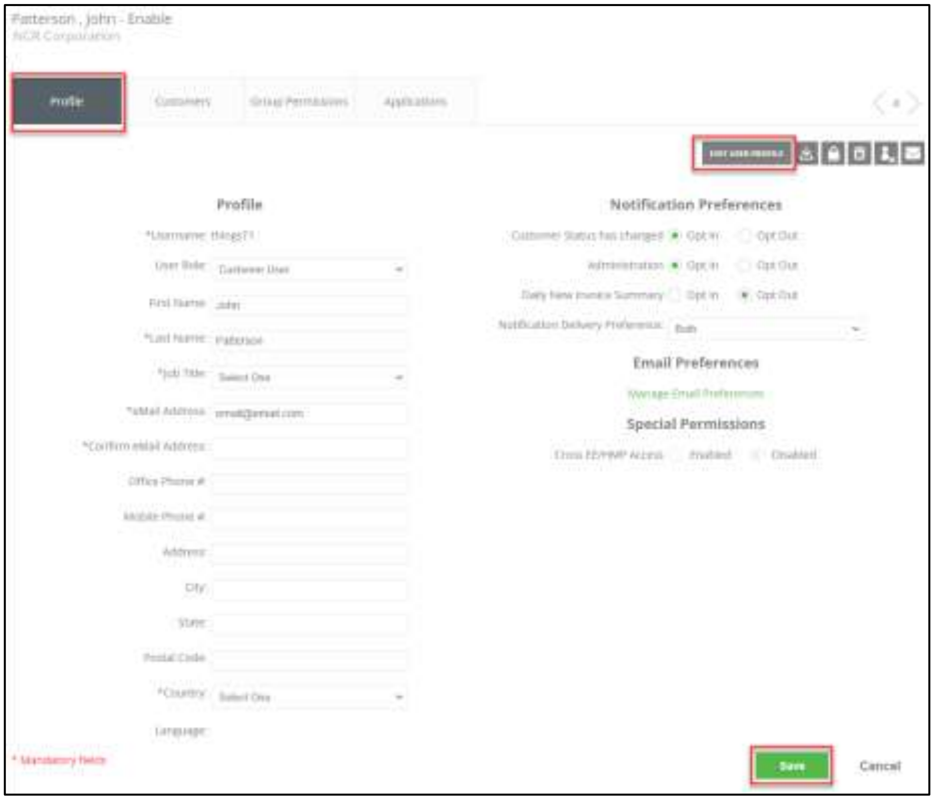


Step 6 Profile Tab

Edit a user's profile information under the profile tab by clicking on the Edit User Profile button, making the necessary changes, then clicking Save.

Step

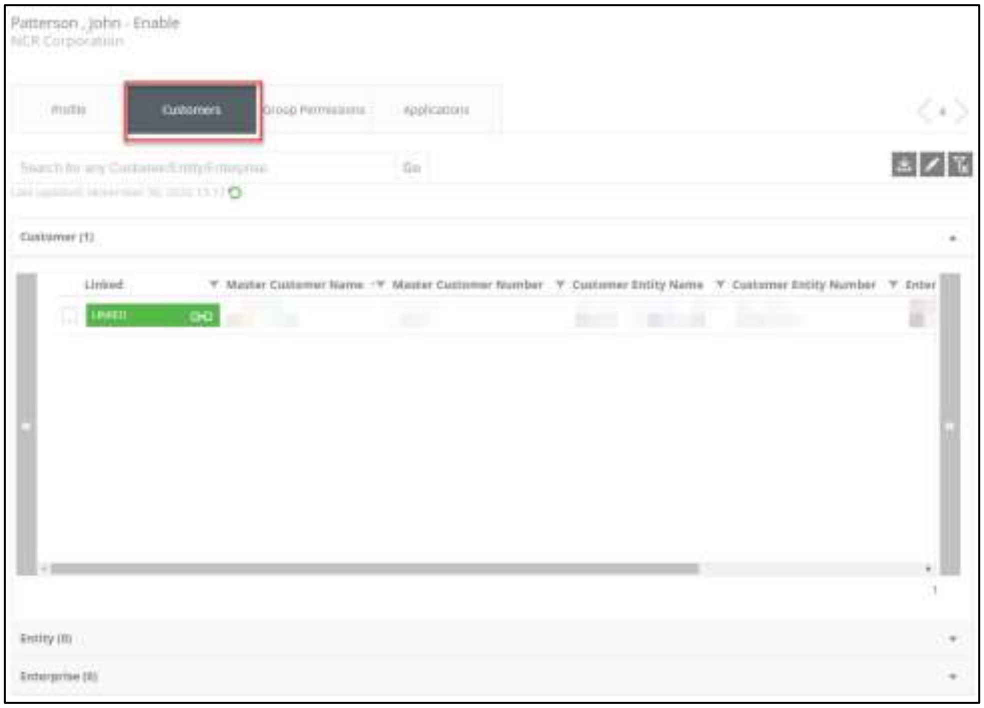
NOTE: You can also change the User Role for a user.



7 Customer's Tab

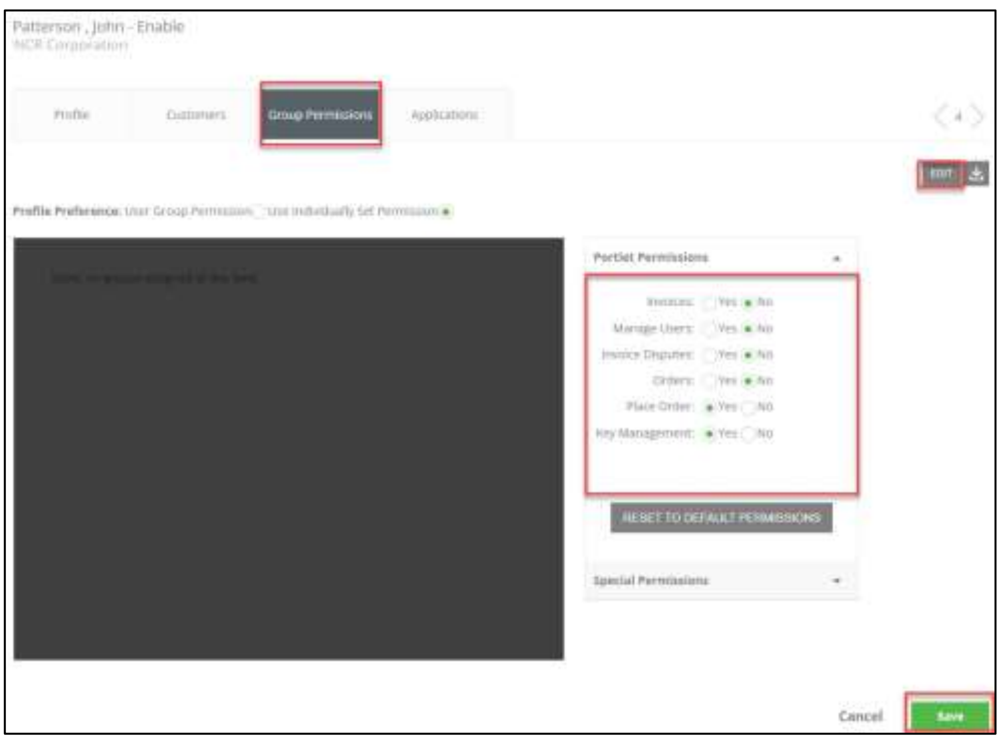
Edit a user's access to NCR VOYIX Master Customer numbers by clicking on the red UNLINKED buttons to change them to green LINKED buttons for each NCR VOYIX Master Customer number to which the user needs access, or vice versa.

Step



Step 8 Group Permissions Tab

Edit a user's access to portlets in the Group Permissions tab by clicking on the Edit button, making the changes to the portlets you wish to grant or prohibit access to, then clicking Save.

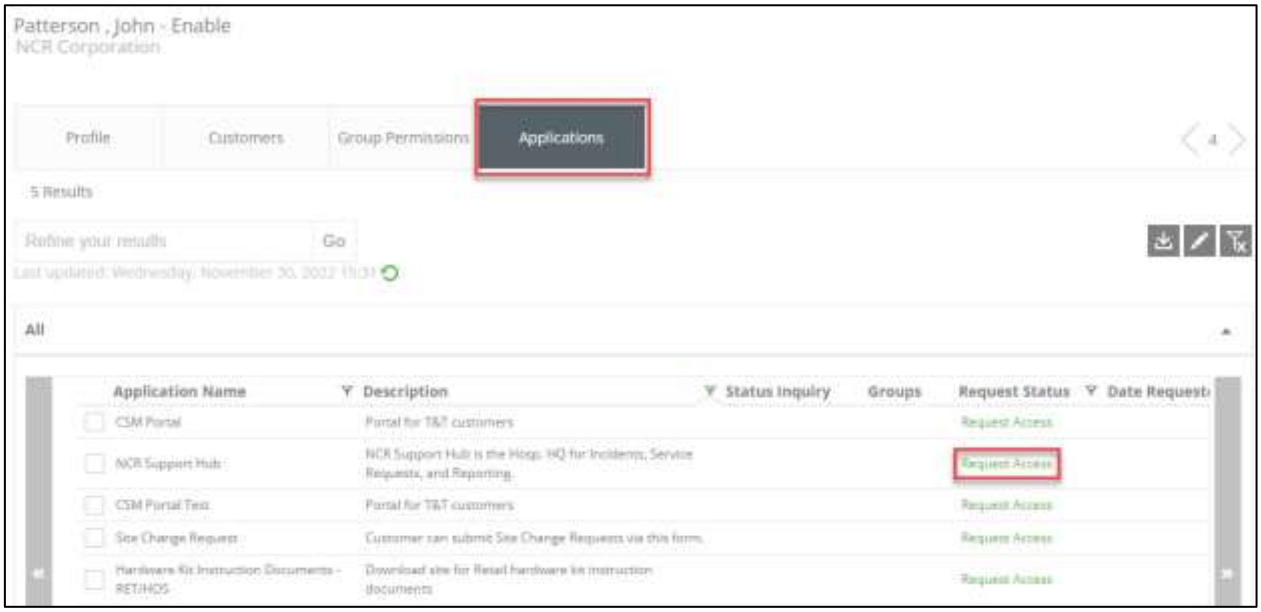


Step

9 Applications Tab

Request access to an application for a user in the Applications tab by clicking on the green "Request Access" text.

NOTE: If the user already has access to an application, you will see "Available" under Request Status, which you can remove, if needed.

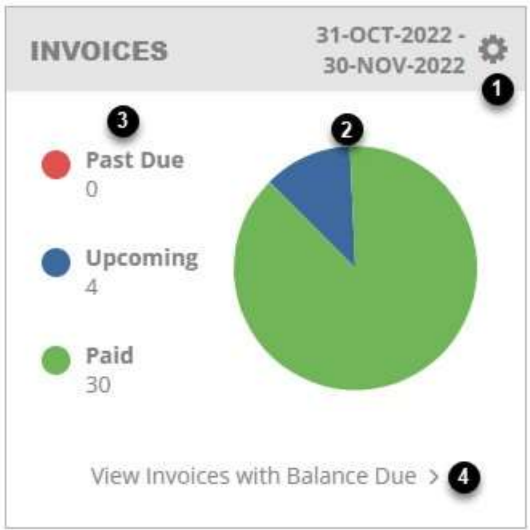


Step

INVOICES

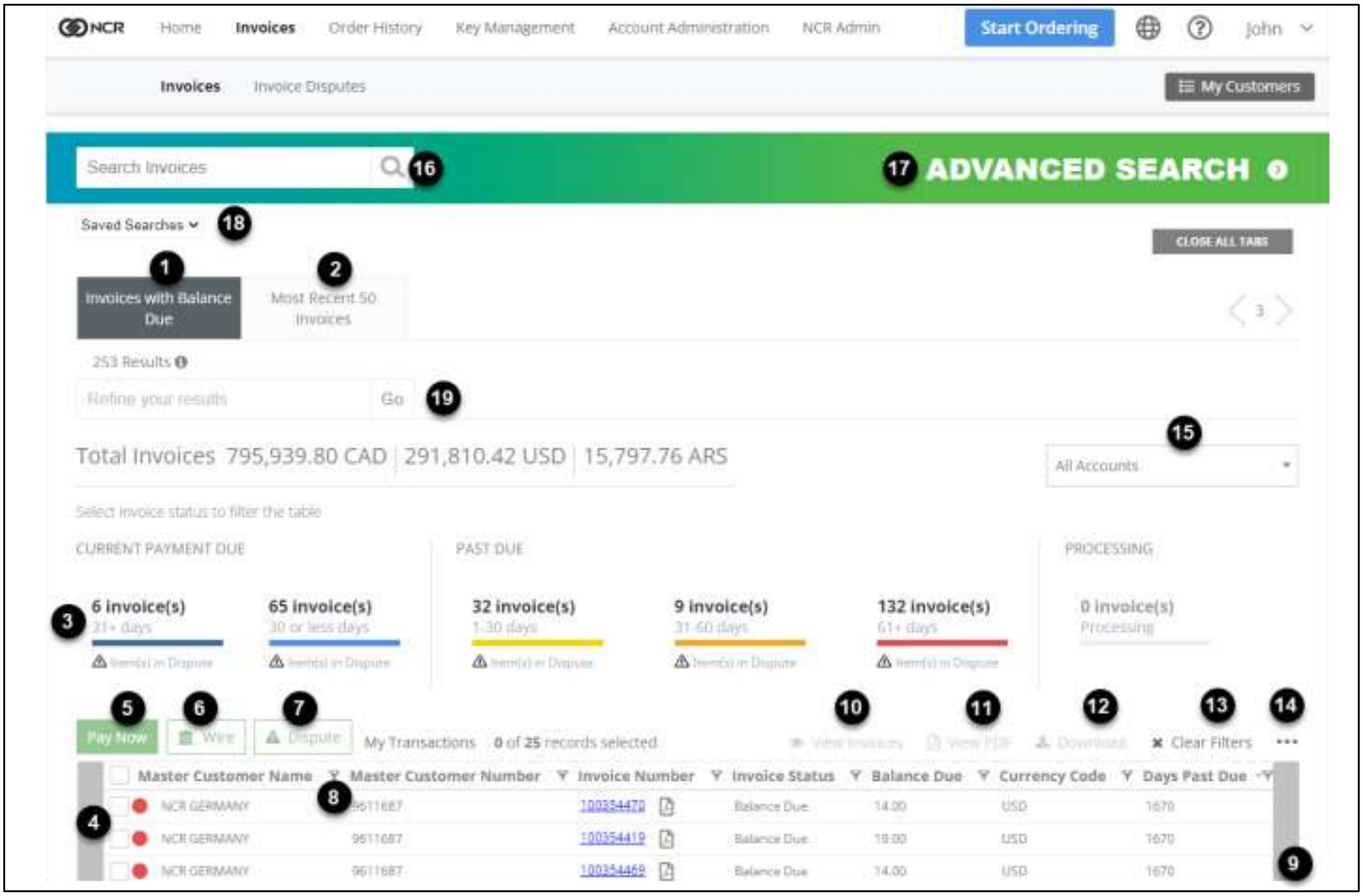
The Invoices functionality is available to all Customer Admins and can be enabled for users by their Admins within the users' profile page or at new user creation.

INVOICES PORTLET



NUMBER	DESCRIPTION
1	Settings: Changes pie chart settings and date range
2	Pie Chart: Quick view of invoice status set in settings. You can click any piece of the chart to be directed to the Invoice Page with a view of your selection.
3	Legend: Details color display of pie chart. You can click each category to be directed to the Invoice Page with a view of your selection.
4	Click the arrow to view invoices with balance due.
5	Access Invoice Page: Click anywhere on the white space to access the Invoice page

INVOICE PAGE



NUMBER	DESCRIPTION
1	Invoices with balance Due tab: View all invoices with outstanding balances
2	Most Recent 50 Invoices tab: Default report for 50 most recent invoices
3	Legend: Details the color display of each invoice. Displays the number of invoices in each bucket. Clicking a bucket allows you to select an option for only viewing invoices in that selection within the report.
4	Invoice selection: Click the box next to the invoice(s) you would like to select
5	"Pay Now" button: Select the invoice(s) you want to pay and click the Pay Now button

6 “Wire Transfer” button: Allows you to submit your wire transfer information to The Customer Portal

7 “Dispute” button: Allows you to submit an invoice for dispute

8 “Filter” button: Each column can be filtered by selecting the filter button to the right of the column name

9 Lateral scrolling bars: Allows you to scroll to the left or right by clicking on the bar

10 “View Invoice” button: View multiple invoices at once in The Customer Portal by using the checkboxes then clicking this button

11 “View PDF” button: View invoice(s) in PDF form

12 “Download” button: Download search results reports to excel, text file or .csv

13 “Clear Filters” button: Clears the filters which you have set on all columns

14 More: Add or remove additional columns to your data table, refresh the table, save a search

15 All Accounts: Select which account you would like to view invoices from

16 Basic Search: Allows you to enter a search term for an invoice across all search fields

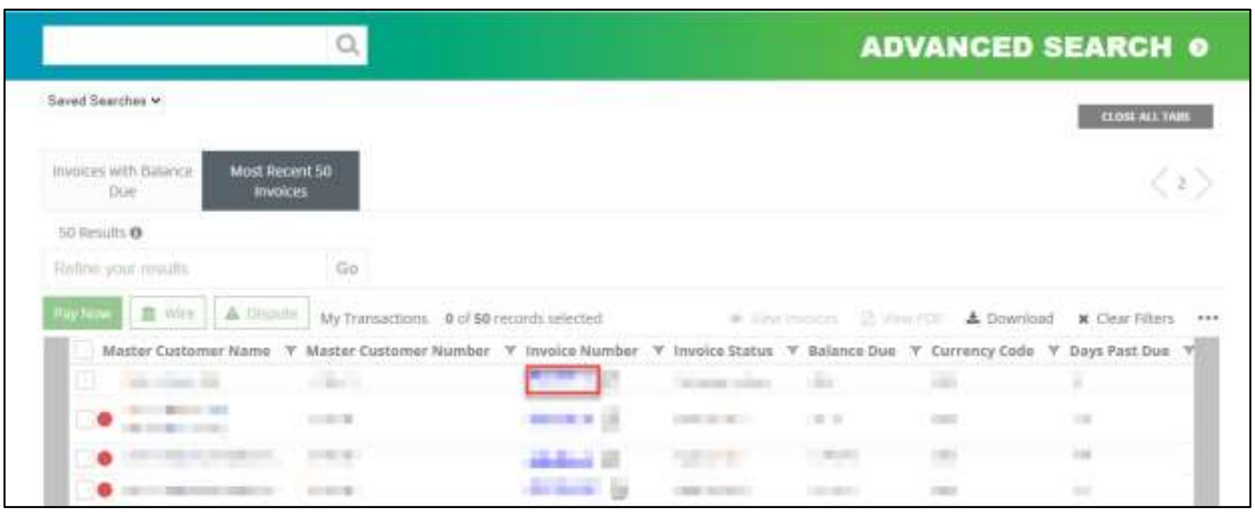
17 Advanced Search: Displays a drop-down list of fields to create more specific searches

18 Saved Searches: Displays a drop-down list of advanced searches you have saved

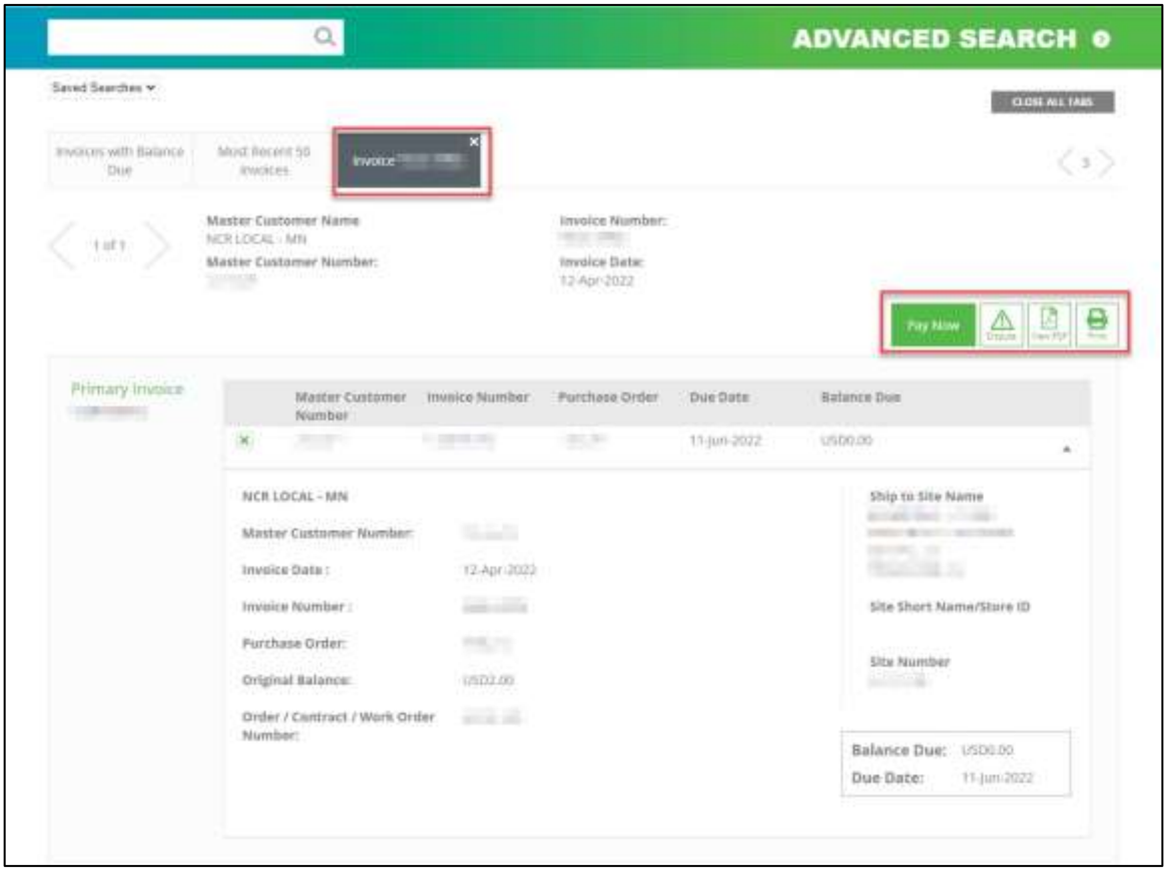
19 Refine Search Results: Further refine your search results

VIEWING AN INVOICE

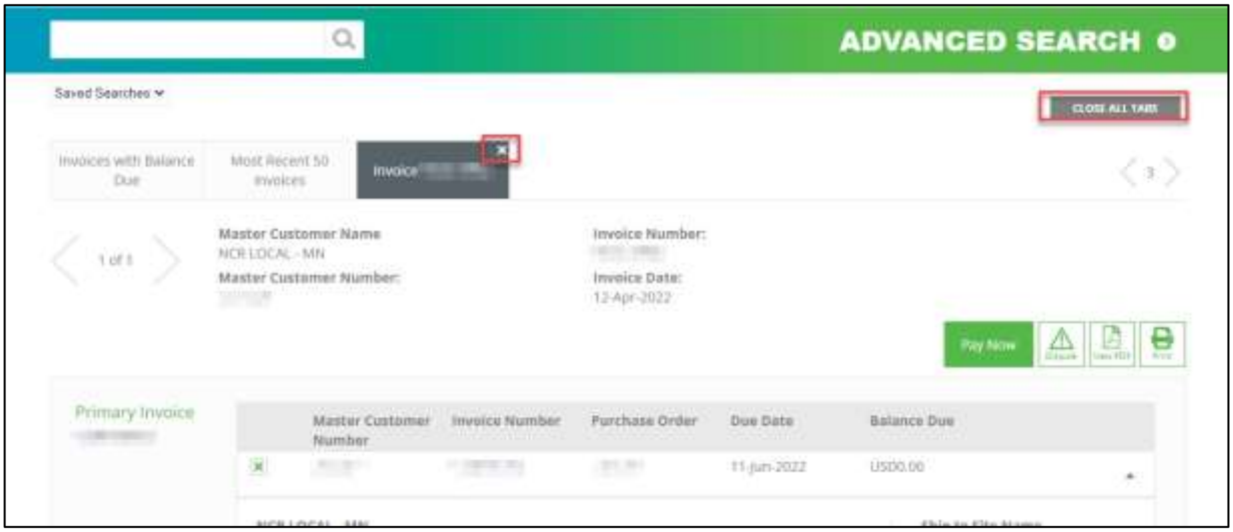
Step 1 To view a specific invoice, click on the desired invoice number, located under the “Invoice Number” column.



Step A preview page will open in a new tab that displays a preview of the invoices, as well as buttons 2 allowing you to “Pay Now”, “Dispute”, “View PDF” or “Print”

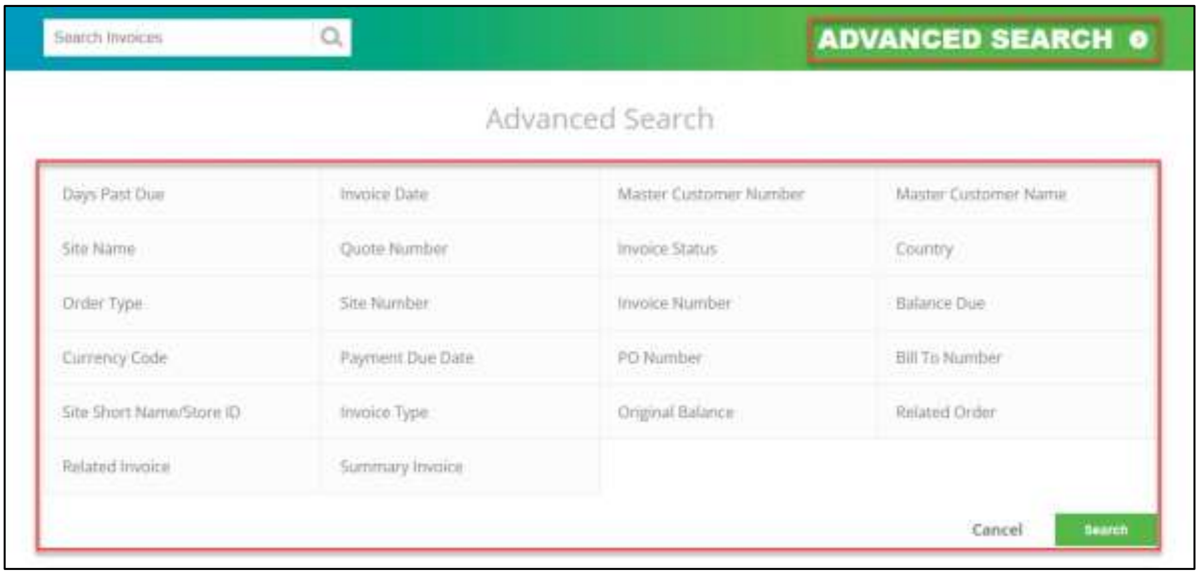

ADVANCED SEARCH
Saved Searches
CLOSE ALL TABS
Invoices with Balance Due
Most Recent 50 Invoices
Invoice
1 of 1
Master Customer Name
NCR LOCAL - MN
Master Customer Number:
Invoice Number:
Invoice Date:
12-Apr-2022
Pay Now
Primary Invoice
Master Customer Number
Invoice Number
Purchase Order
Due Date
Balance Due
11-Jun-2022
USD0.00
NCR LOCAL - MN
Master Customer Number:
Invoice Date :
12-Apr-2022
Invoice Number :
Purchase Order:
Original Balance:
USD2.00
Order / Contract / Work Order Number:
Ship to Site Name
Site Short Name/Store ID
Site Number
Balance Due:
USD0.00
Due Date:
11-Jun-2022

Step Once you are done using the invoice preview page, click on the “x” in the tab or use the Close 3 All Tabs button.

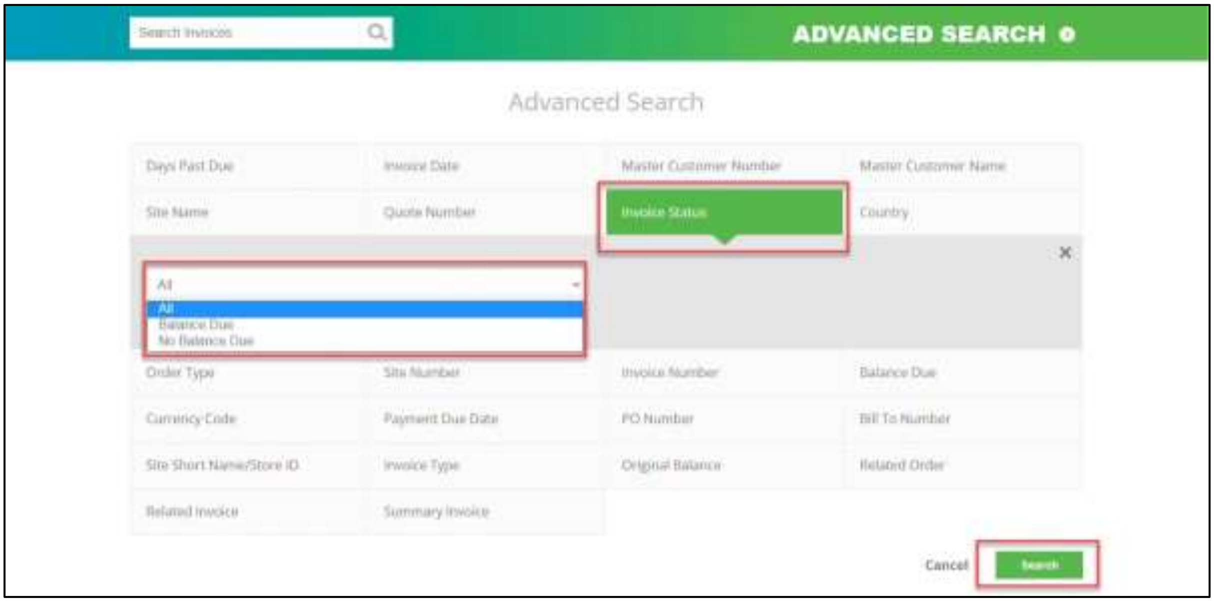


USING ADVANCED SEARCH

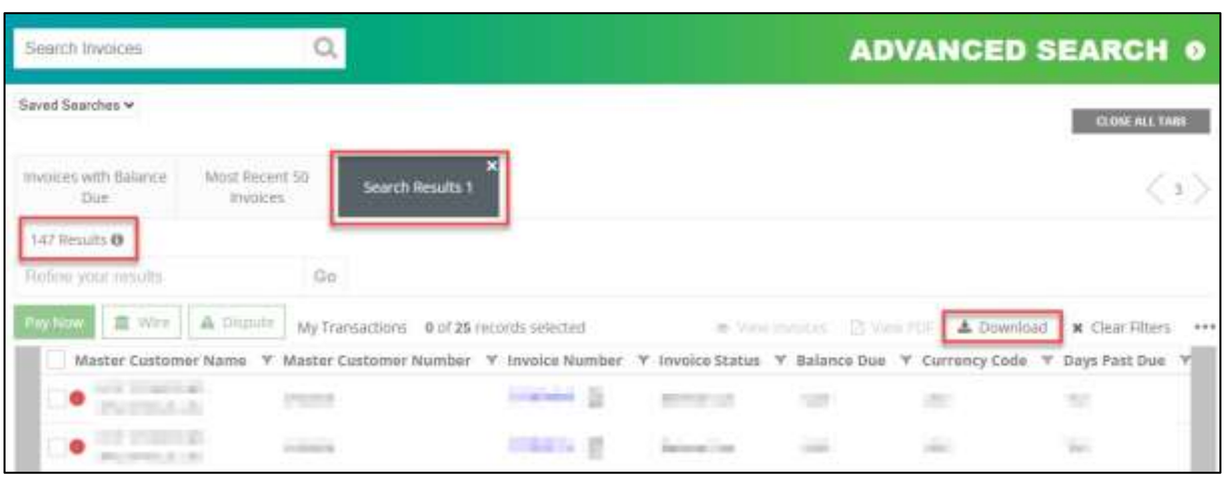
Step 1 From the "Invoice" page, click on the "Advanced Search" button for a drop-down list of fields you may use for searching.



Step 2 Click on any field or combination of fields to create an advanced search. For example, you can select the "Invoice Status" field, define your term, then click "Search".



Step 3 A new tab will populate a new report with the results from your advanced search. You will see how many results were found and can also use the Download button to name and save your searches for faster access next time.



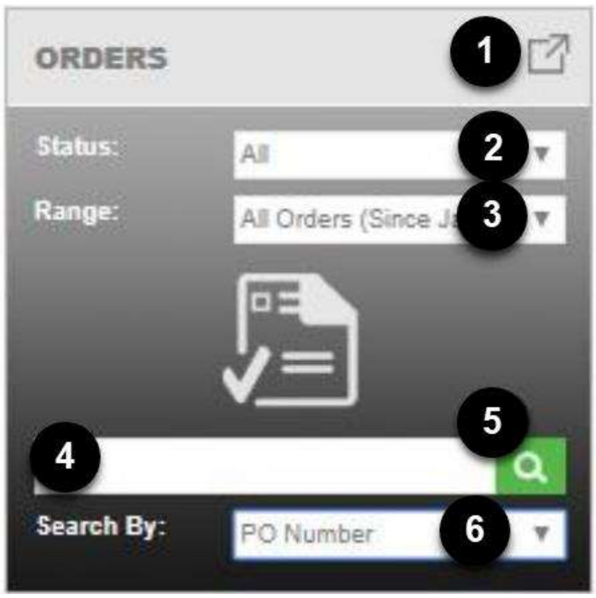
INVOICE DISPUTES PORTLET

NUMBER	DESCRIPTION
1	Quick view of invoice disputes that are open and/or awaiting customer
2	Legend: Details color display of quick view
3	“Access Page” button: Click to access Invoice Dispute page

ORDERS

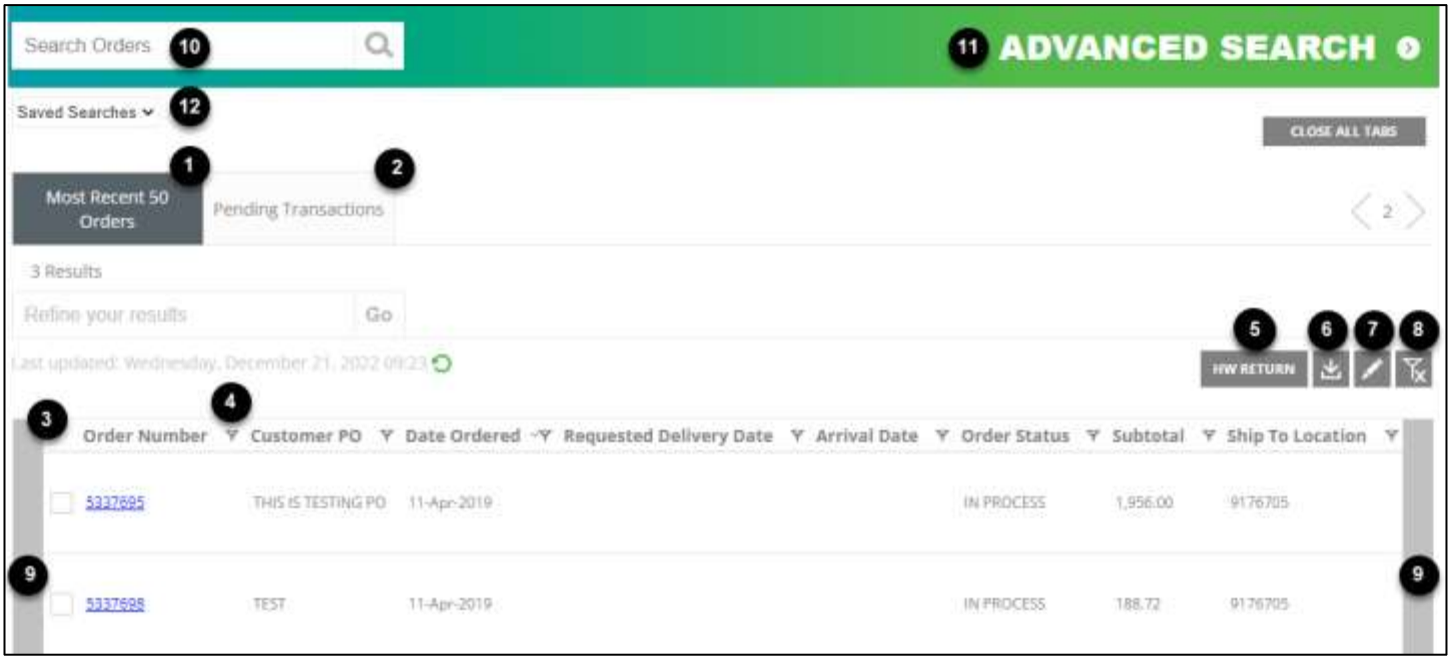
The Orders functionality is available to all Customer Admins and can be enabled for users by their Admins within the users' profile page or at new user creation.

ORDERS PORTLET



NUMBER	DESCRIPTION
1	"Access Page" button: Navigates to the Orders page
2	Status: Allows you to search for an order from a drop-down list of statuses
3	Range: Allows you to search for an order from a drop-down list of date ranges
4	Search bar: Allows you to enter terms that will be used in conjunction with the "Search By" drop-down
5	"Search" button: Click to perform the search using the terms selected above
6	Search By: Drop-down lists of fields you can use to search for the terms entered in the Search bar

ORDERS PAGE



NUMBER	DESCRIPTION
1	Most Recent 50 Orders tab: Default report for 50 most recent orders
2	Pending Transactions tab: Tab for a report of online orders that have not fully processed
3	Report/Data table: Report of highlighted tab
4	"Filter" button: Columns can be filtered by selecting the filter button to the right of the column name
5	"HW Return" button: If the order status is COMPLETE, and HW Return is enabled for your MCN, this button allows you to initiate a hardware return
6	"Download Search Results" button: Download search results reports to excel, text file or .csv
7	"Add/Remove Columns" button: Adds or removes additional columns to your data table

8 "Clear Filters" button: Clears the filters which you have set on all columns

9 Lateral scrolling bars: Allow you to scroll to the left or right by clicking and dragging the bar

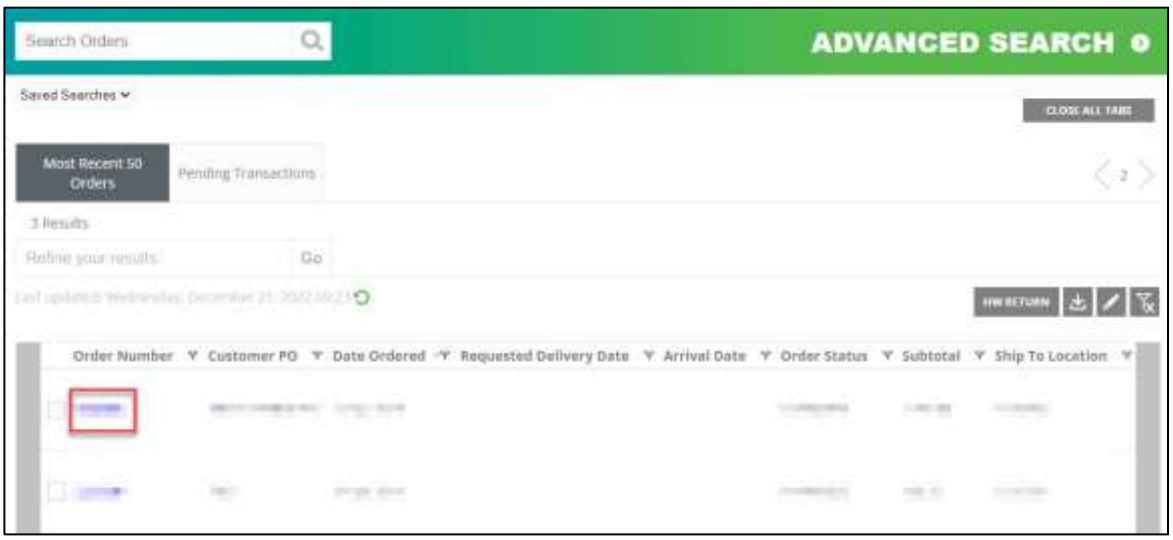
10 Basic Search: Search for an order across all search fields

11 Advanced Search: Displays a drop-down list of fields create more specific searches

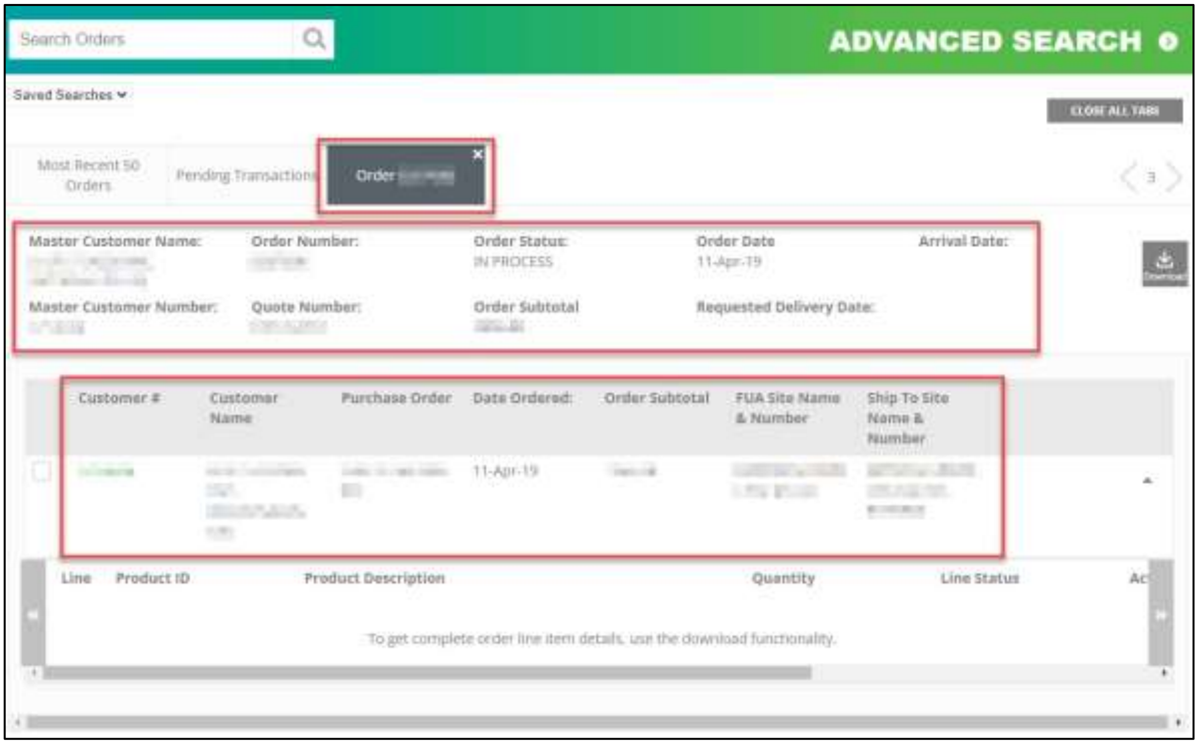
12 Saved Searches: Displays a drop-down list of advanced searches you have saved

VIEWING ORDER DETAILS & SHIPMENT TRACKING INFORMATION

Step 1 To view the Order Details page for a specific order, click on the desired order number, located under the "Order Number" column.

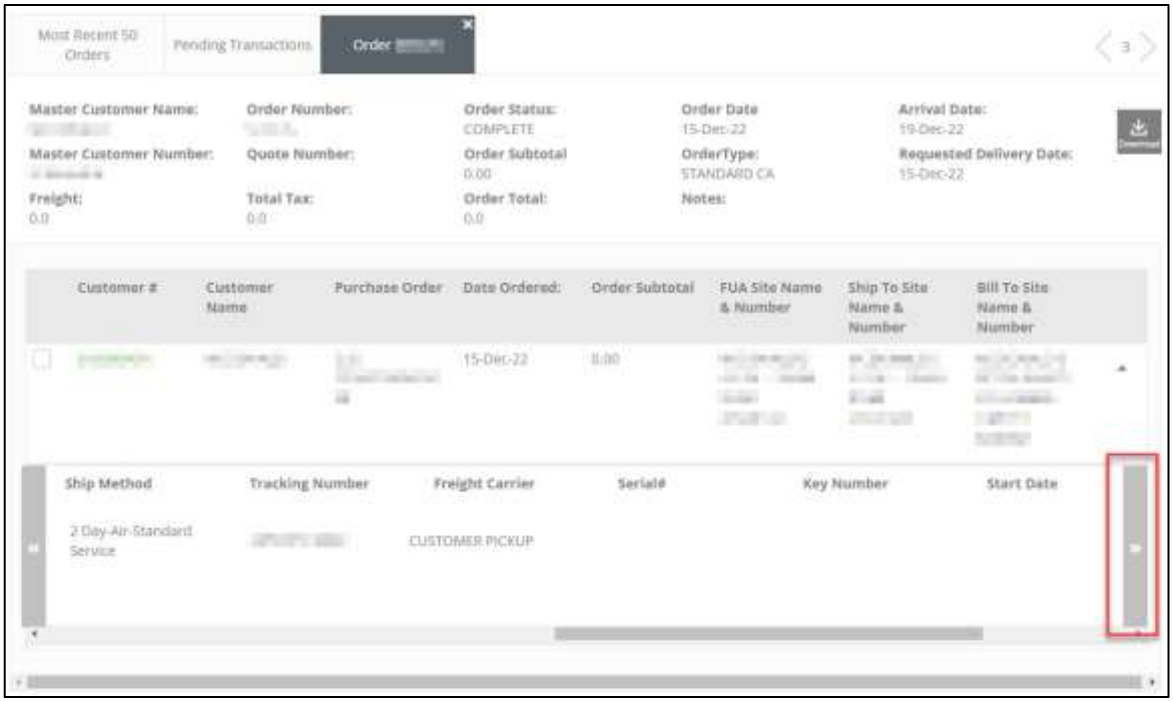


Step 2 The orders details page will open in a new tab and display order detail information.

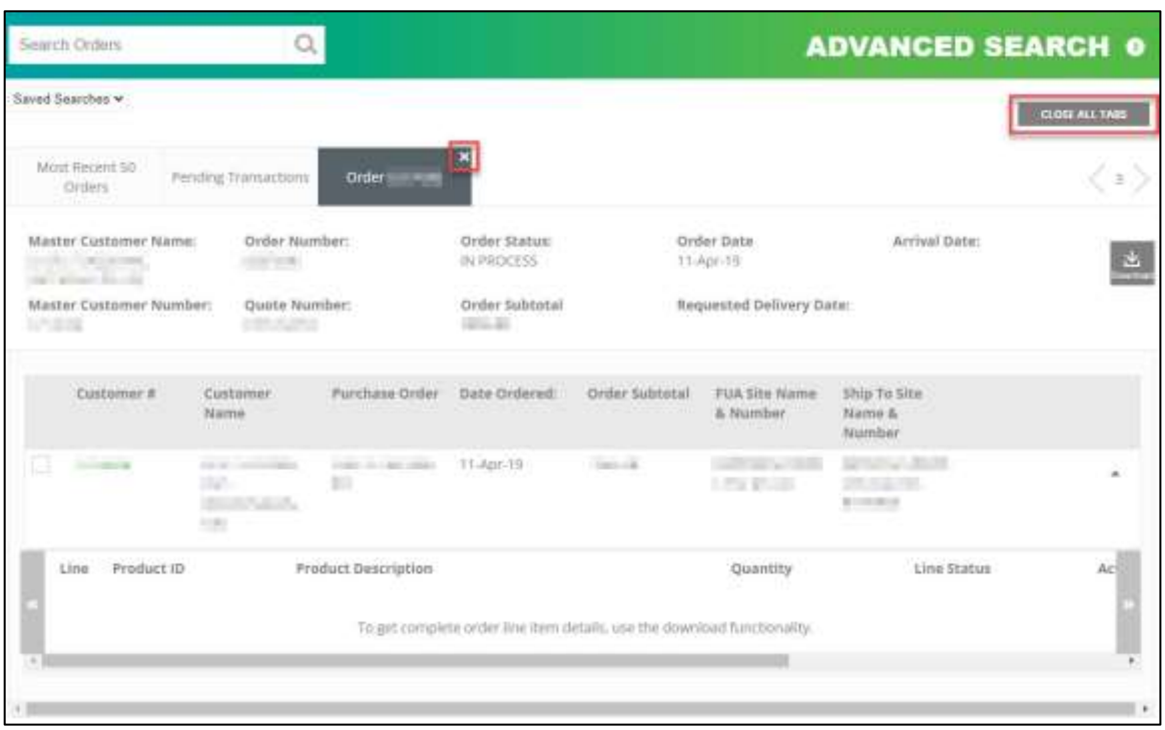


Step 3 Use the lateral scrolling bar to view details, including shipment details, at a line level for each product ordered.

NOTE: Shipment tracking numbers are available for the following 7 carriers:
FedEx, UPS, OMNI, Pegasus, SEKO, CEVA, CRST



Step 4 Once you are done using the Orders Details page, click on the "x" in the tab or use the Close All Tabs button.



APPLICATIONS

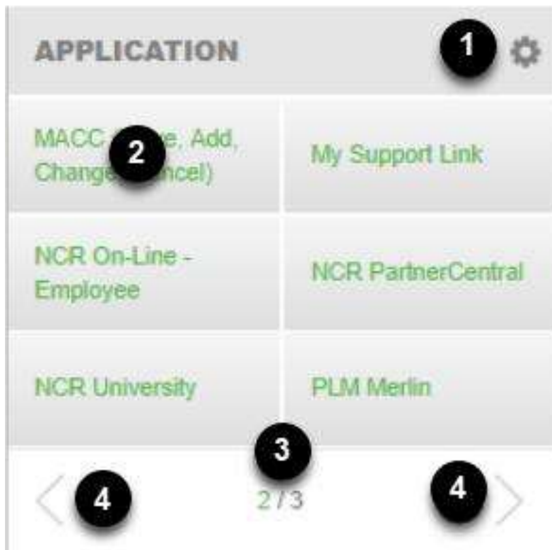
The Customer Portal serves as a secure gateway giving you access numerous NCR VOYIX sites which you may use depending upon your business with NCR VOYIX. These sites can be added to your profile in the form of an application and will appear in the application portlet once they are available for use.

The application must first be assigned to your NCR VOYIX Master Customer number then request by the Customer admin for each user that needs access. Customer Admins can request application access on their own behalf in their profile page and can also request access for their users in the users' profile page or at new user creation.

Once the application has been requested it may take 3-5 business days to be processed. Once the request has been processed the Customer Admin who submitted the request and the user, if applicable, will receive an email and the application will populate in the Application Portlet. There are two applications that have their own portlets, My Support Link and Move, Add, Change, Cancel; approval to these applications will also produce the Incident Management and Assets portlets, respectively.

NOTE: Any training, resources and support for applications will be provided in the application's site itself or the approval email, when available.

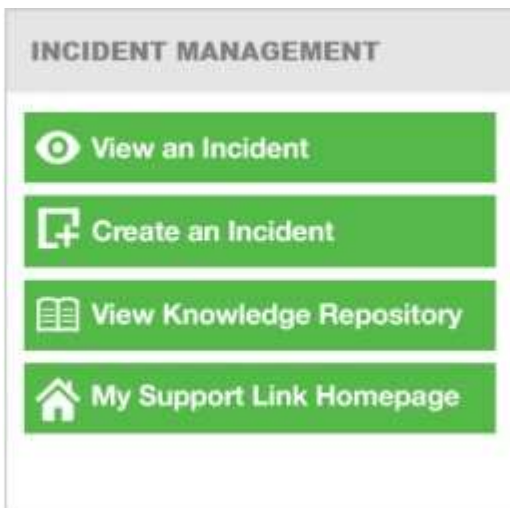
APPLICATION PORTLET



NUMBER	DESCRIPTION
1	Settings: Change what applications will appear in the portlet
2	Access Application: Example of where to click to navigate to the application site
3	Page: shows which page you are viewing and how many pages are available 4
	Page arrows: allows you to go access pages for more applications

INCIDENT MANAGEMENT PORTLET & MY SUPPORT LINK SITE

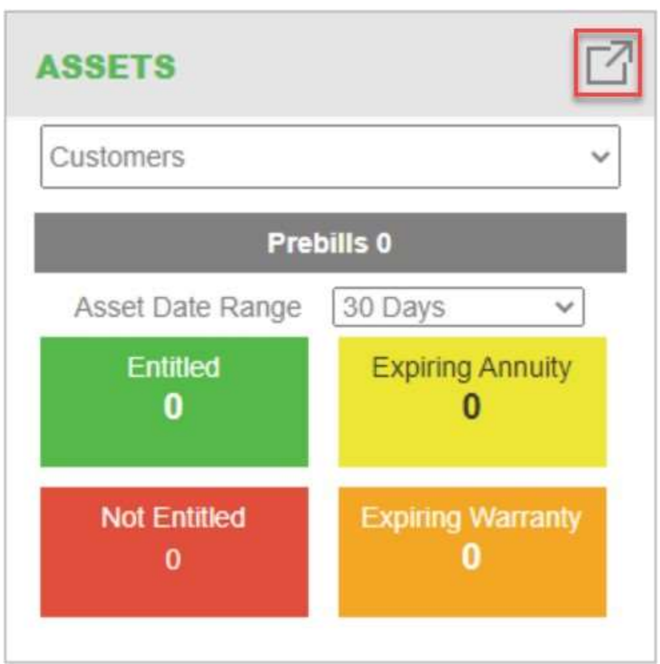
(NCR @YOURSERVICE)



The Incident Management Portlet gives you a few quick links to access features in the My Support Link (NCR@YourService) site. You can click on any of these quick links to access the site.

NOTE: Any training, resources and support for applications will be provided in the application site itself or the approval email, when available.

ASSETS PORTLET & MOVE, ADD, CHANGE. CANCEL SITE (MACC)



The Assets portlet shows you a few quick glance views of Prebills, entitlements, annuities and warranties. Access the Move, Add, Change, Cancel site by clicking on the access button in the top right side of the portlet.

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