



# MyNCR

## Getting Started Guide

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

For more information, visit [ncr.com](https://ncr.com), or email [MyNCR.Administrator@ncr.com](mailto:MyNCR.Administrator@ncr.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

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- 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

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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

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### 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
- **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

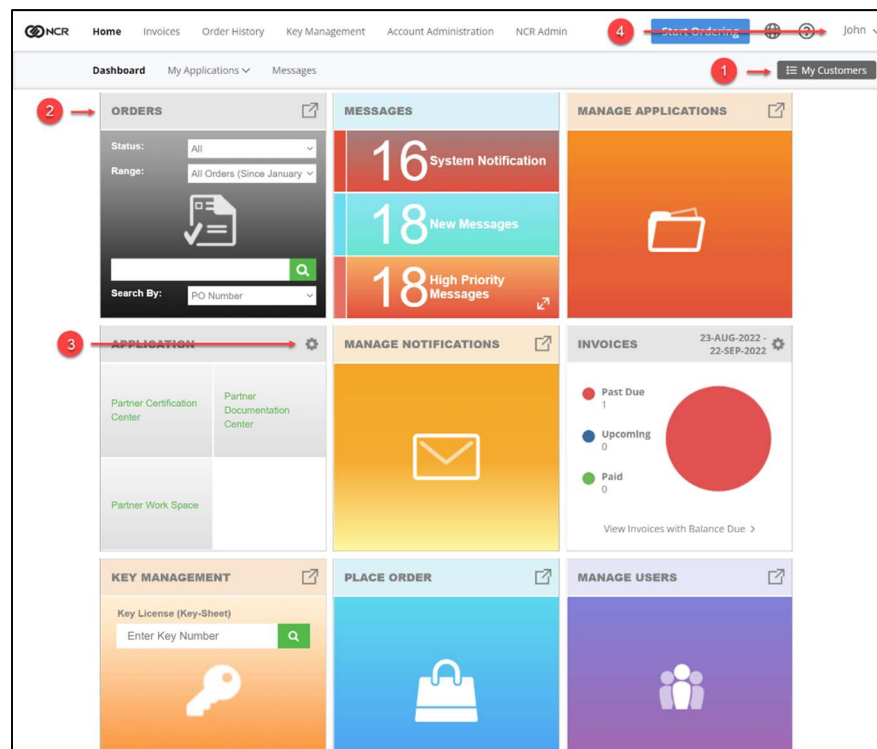
These are your portlets. They are interactive, rearrangeable boxes on your dashboard which help you navigate to where you're trying to go in MyNCR. Here are your portlets: Manage Customers, Manage Users, Messages, Invoices, Application.

## 3. Settings

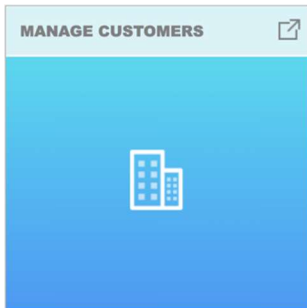
On several portlets you will see a gear. The gear offers access to different options within a portlet. For example, in the Invoices portlet, the gear allows you to select the date range displayed on the pie chart.

## 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.

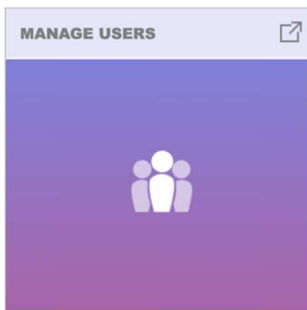


## MyNCR PORTLETS



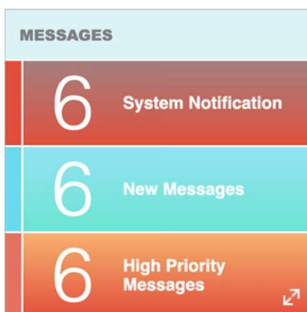
The **Manage Customers** portlet gives you access to all customers that you are linked to. Here are few things you can do to manage customers:

- Search for customers
- View customer profiles
- Link users to a customer (admin only)
- View users associated with a customer
- Create groups and assign permissions (admins only)
- View applications assigned to customer



The **Manage Users** portlet gives you visibility to all users within your organization. Here are a few things you can do to manage users:

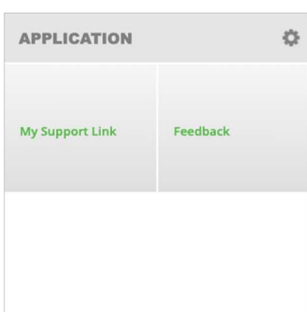
- Create new users (admins only)
- View user profiles
- Download user information



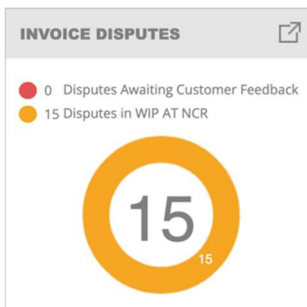
The **Messages** portlet shows you the messages that you've received from an administrator. These will usually appear when an application has been requested and a MyNCR Administrator has responded to the request.

Outage information, new features and enhancements will now be communicated via a pop up at login.

User will have the option to dismiss the notification, but all notifications will be archived for future reference in the Messages Portlet.

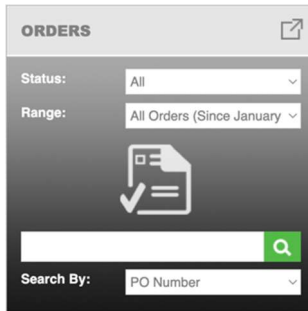


The **Application** portlet displays up to 6 applications per page that you have access to use. To customize which applications will be displayed in the portlet, you would click on the gear and select which applications to display. To access any of the applications available to you, simply click the application name within the portlet.



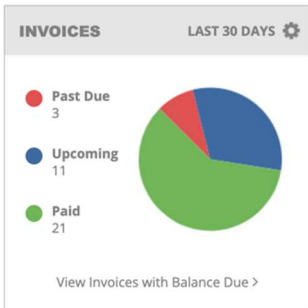
The **Disputes** portlet allows users that have access to invoices a quick way to view those invoices that have been disputed. This will show:

- In red, the number of disputes awaiting customer feedback
- In yellow, the number of disputes that are being worked
- Clicking on the pie chart or the [ICON] allows the user to view the "Invoice Disputes" page.



The **Orders** portlet allows users to view their orders and line level detail. The most recent 50 orders will be displayed. Here are some of the capabilities available on the Order History page:

- The order number is a clickable link to view specific order details.
- Order header details can be downloaded by clicking the download button. [ICON]
- Order line details can be downloaded by clicking the download button. [ICON]
- You can refine your results by using the search bar.
- Advanced search is also available.



The **Invoices** portlet provides those that have access to invoices the ability to view, print and download invoices. The portlet displays data for paid, past due and upcoming invoices. The user can:

- Change the settings on the portlet by clicking the gear
- Click any color in the pie chart to view the invoices in that category
- Click anywhere in the white area and be taken to the invoices page
- Click on the Invoices with Balance Due button to be taken to the invoices page for those invoices

# 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.

### 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

The MyNCR Customer Administrator is responsible for creating new users, managing permissions and disabling/enabling customer user accounts.

## CREATING A NEW USER

**Step 1:** Click the Create New User box on the Manage User Page and fill out first name, last name, add email twice, and assign a User Role. Entering an email twice ensures that the email address is entered correctly.

**Step 2:** Create a username, the username must be at least 6 digits and contain a number.

Username \*

**Step 3:** Choose which Customer(s) the user will have access to by clicking the link button. The user will only have access to the customer they are linked to.

**Step 4:** If you want the user to have access to all customers on the list, you can directly link the user to the entity, and it will give access to all customers in that entity. Or, if you want the user to have access to all entities on the list, you can directly link the user to the enterprise.

**Step 5:** During user creation there is the option of assigning groups, changing permissions, and requesting applications.

**Step 6:** Click the 'Assign Groups and Permissions' tab. Change any permissions and assign user to groups.

**Step 7:** Click the 'Request Application Access' tab. Next to the application name, select the 'Request Access' link to request access to the application for the user.

Application Name	Description	Groups	Request Status
<input type="checkbox"/> Incident View	Allows GEMS users to search and view incident activity, status, and summary info without having to login into GEMS user tool. This empowers users to ensure quality service for end-user satisfaction.		Request Access
<input type="checkbox"/> My Asset List	Provides customers with the ability to display all equipment that is attached to a particular site.		Request Access
<input type="checkbox"/> My Reports	Provides access to Standard and Custom Reports		Request Access

After selecting both the 'Assign Groups and Permissions' and 'Request Application Access' tab, the save button should be activated, and turn green. Click on the save button, and you should receive a Success Message upon successful new user creation.

### Helpful Tip:

Quickly add users with identical settings and permissions by using the CLONE USER button on the Manage Users page.



# 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 search bar labeled 'Search Users' and a green header with 'ADVANCED SEARCH'. Below the header, the 'Manage Users' title is centered, with 'CREATE NEW USER' and 'CLONE USER' buttons to the right. A 'Saved Searches' dropdown menu is visible, with a 'CLOSE ALL TABS' button. A 'USERS' button is located on the left side. The main content area shows '373 Results' and a 'Refine these results' input field with a 'Go' button. A timestamp indicates 'Last updated: Friday, May 20, 2022 18:22'. A toolbar with icons for search, edit, delete, and other actions is present. Below the toolbar is a table of users with columns for Username/QLID, Last Name, First Name, Email Address, Office Phone Number, User Role, Last Login Date, and User Country.

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