



McDonald’s User Guide

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Purpose of This Guide

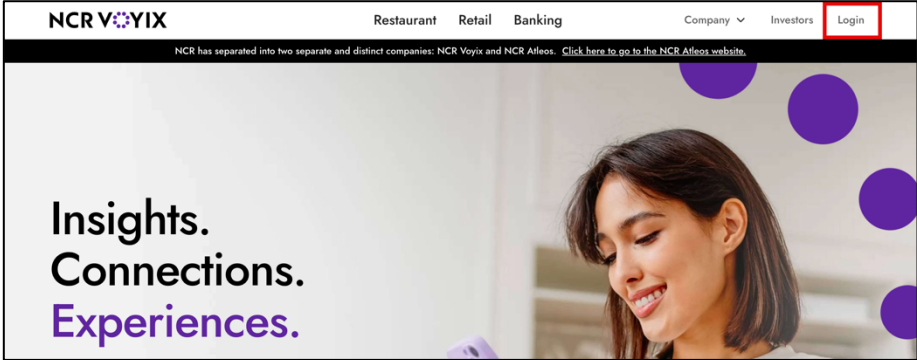
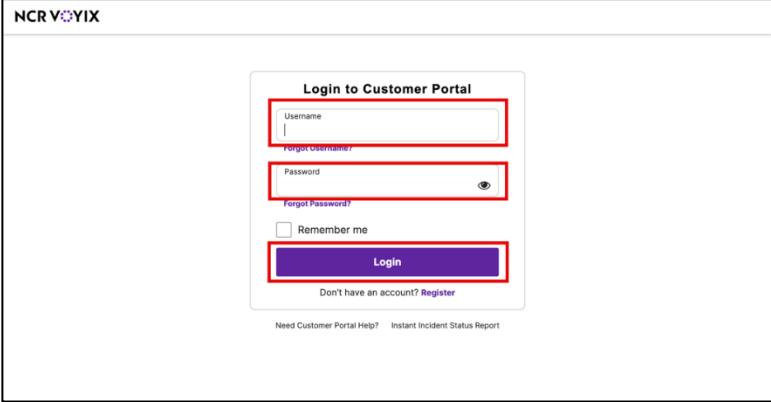
This user guide for Customer Portal is designed to provide McDonald's users with basic instructions for the features and functionality available within the Customer Portal.

The intended audience for this guide is McDonald's Owner Operators and location administrators who order products and services from NCR VOYIX.

The Customer Portal provides NCR VOYIX customers with account management capabilities including invoicing, invoice disputes, site deployment tracking, and management of users. It is available for use (except during scheduled and announced maintenance time) 24 hours per day, 7 days a week, 365 days per year.

Login, Navigation, and Profile

Logging In

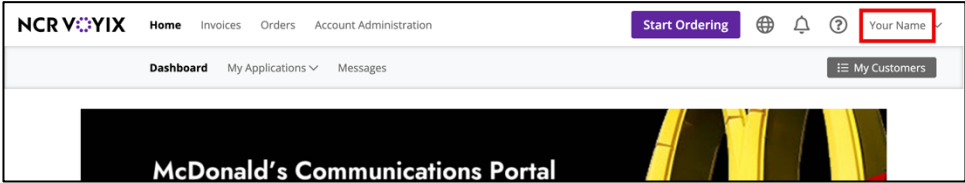
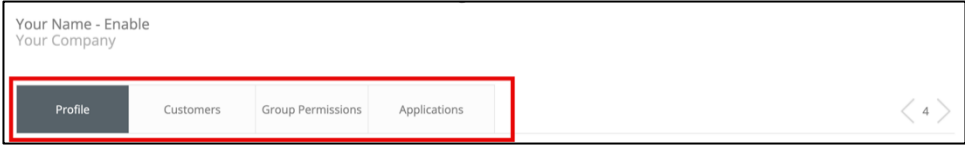
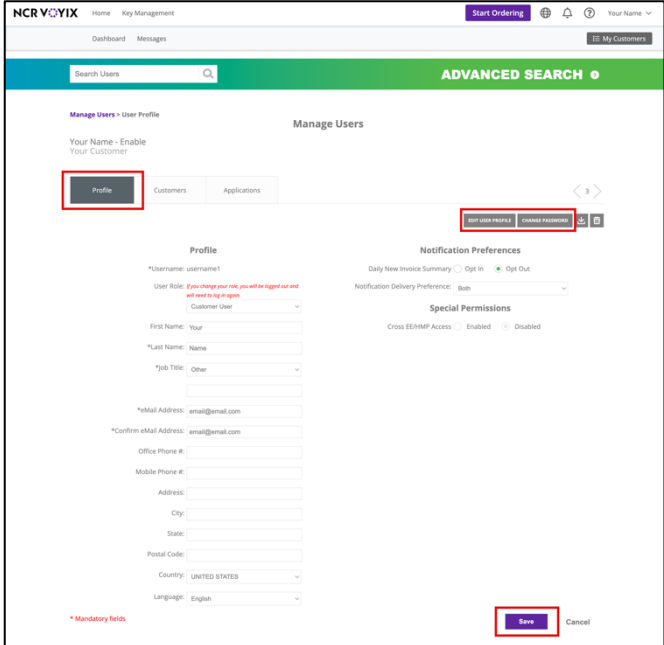
| Step | Action |
|------|---|
| 1 | <p>To access your Customer Portal account, go to NCR Voyix.com and click on the “Login” text in the upper right-hand corner of the page.</p>  <p>The screenshot shows the NCR Voyix website header with navigation links for Restaurant, Retail, and Banking. The 'Login' link is highlighted with a red box. Below the header is a banner with the text 'Insights. Connections. Experiences.' and a photo of a smiling woman.</p> |
| 2 | <p>On the login page, enter your Username and Password; Then click “Login”.</p> <p>NOTE: Your username is <i>not</i> your email address. If you have forgotten your username, use the options to retrieve your username and/or reset your password on the login page. If unable to reset your password, please contact the McDonald’s Center of Excellence, and we can quickly create and provide a username or reset a password.</p>  <p>The screenshot shows the 'Login to Customer Portal' form. The 'Username' field, 'Password' field, and the 'Login' button are highlighted with red boxes. There are also links for 'Forgot Username?' and 'Forgot Password?'. At the bottom, there is a 'Remember me' checkbox and a 'Don't have an account? Register' link.</p> |

Customer Portal Homepage

The screenshot displays the NCR Voyix Customer Portal homepage. At the top, the navigation bar includes the NCR Voyix logo (1), a Home link (2), and links for Invoices, Orders, and Account Administration. A Start Ordering button (3) is prominently displayed. On the right side of the navigation bar, there are icons for a globe (4), a bell (5), and a user profile (6) labeled 'Your Name'. Below the navigation bar, a Dashboard section (7) contains links for My Applications and Messages. The main content area features a large banner (8) for the 'McDonald's Communications Portal' with an 'Enter' button. Below the banner are three main sections: 'INVOICES' (9) with a pie chart showing 'Last 90 days' data (Past Due: 8, Upcoming: 0, Paid: 109) and a 'View & Pay Invoices' button; 'ORDERS' (10) with filters for Status (All), Range (All Orders (Since January)), and Search By (PO Number), along with a search input field; and 'INVOICE DISPUTES' (11) showing 0 Disputes Awaiting Customer Feedback and 0 Disputes in WIP at NCR Voyix. At the bottom, there is an 'ONLINE ORDERING' (12) section with 'Start Ordering' and 'Review Pending Orders (9)' buttons, and a '+ ADD - REMOVE' button.

| Number | Description |
|--------|---|
| 1 | NCR VOYIX brand box: Click here to navigate back to the homepage at any time. |
| 2 | Navigation Menu: Click here to access Customer Portal features and capabilities. |
| 3 | "Start Ordering" button: Click here to navigate to online ordering. |
| 4 | "Language Preference" button: Click here to change your language preferences. |
| 5 | "Notification" button: Click here to see your Customer Portal System Notifications |
| 6 | "Your Name": Click here to open your profile page. |
| 7 | "My Customers" button: Click here to display the linked NCR VOYIX Account Numbers to which you have access. |
| 8 | "McDonalds Communication" Portlet: This will navigate you to the McDonald's Communication portal. |
| 9 | "Invoice" Portlet: Shows a pie chart view of invoices and navigates you to the Invoice page. |
| 10 | "Orders" Portlet: Provides quick ways to search for an order and navigates you to the Orders page. |
| 11 | "Invoice Dispute" Portlet: Displays a quick status of invoice disputes that are open and navigates you to the Invoice Dispute page. |
| 12 | "Online Ordering" Portlet: Click "Start Ordering" to navigate to online ordering. Click Review Pending Orders to review orders uploaded for you by NCR. |

Managing Your Profile

| Step | Action |
|------|--|
| 1 | <p>Access your profile page by clicking your name in the top right of the page.</p>  |
| 2 | <p>Within your profile page, you will see the following tabs for the sections you can view and manage: Profile, Customers, Group Permissions and Applications.</p>  |
| 3 | <p>Profile Tab</p> <p>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.</p>  |

4

Customers Tab

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

Your Name - Enable
Your Company

Profile **Customers** Group Permissions Applications

Search for any Customer/Entity/Enterprise Go

Last updated: Friday, August 02, 2024 15:52

Customer (5)

| Linked | Master Customer Name | Master Customer Number | Customer Entity Name | Customer Entity Number | Enter |
|---------------------------------|----------------------|------------------------|----------------------|------------------------|-------|
| <input type="checkbox"/> LINKED | | | | | |
| <input type="checkbox"/> LINKED | | | | | |
| <input type="checkbox"/> LINKED | | | | | |
| <input type="checkbox"/> LINKED | | | | | |
| <input type="checkbox"/> LINKED | | | | | |

Entity (0)

Enterprise (0)

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.

Patterson, John - Enable
NCR VOYIX

Profile Customers **Group Permissions** Applications

Profile Preference: User Group Permission Use Individually Set Permission

Sorry, no groups assigned at this time.

Portlet Permissions

Application: Yes No

Invoices: Yes No

Messages: Yes No

Manage Users: Yes No

Manage Customers: Yes No

Assets: Yes No

Invoice Disputes: Yes No

RESET TO DEFAULT PERMISSIONS

Special Permissions

Cancel **Save**

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 access to, if applicable.

Patterson, John - Enable
NCR VOYIX

Profile Customers Group Permissions **Applications** < 4 >

5 Results

Refine your results Go

Last updated: Monday, July 22, 2024 13:03

All

| Application Name | Description | Status Inquiry | Groups | Request Status | Date Request |
|--|--|----------------|--------|-----------------------|--------------|
| <input type="checkbox"/> My Support Link - CSMS | Provides access to Support application for Services Customers and Partners | | | Request Access | |
| <input type="checkbox"/> NCR Business Intelligence Dashboard | Customer URL: https://appcenterhubler.com/MSI/Frame | | | Request Access | |
| <input type="checkbox"/> Hardware Kit Instruction Documents - R21942 | USPS reporting console to monitor service levels, inventory and geographical trends. | | | Request Access | |
| <input type="checkbox"/> Hardware Kit Instruction Documents - R21942 | Download site for Retail hardware kit instruction documents. | | | Request Access | |
| <input type="checkbox"/> WSC - US25 | Manages work orders, asset movement & all installed devices at reader level for CSMS by serial number. It will interface with CSMS to provide up to date work orders status by using CSMS interface. | | | Request Access | |
| <input type="checkbox"/> MNCI (New, AMI, Change, Cancel) | New, AMI, Change, Cancel is a tool to improve accuracy, meeting accuracy and timeliness by providing on-line management of asset enrollment to our customers and NCR account support personnel. | | | Request Access | |

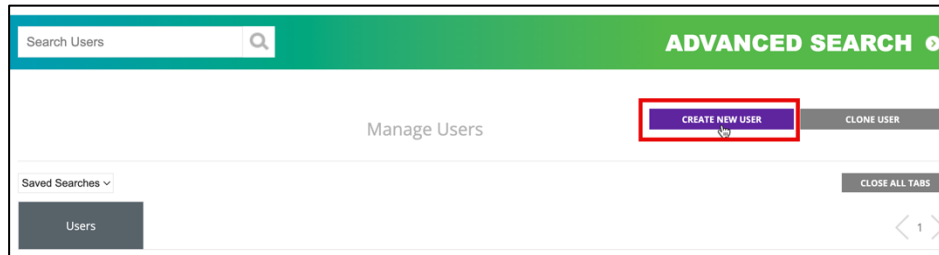
1

Creating New Users

| Step | Action |
|------|---|
| 1 | <p>From the Customer Portal homepage, access the Manage Users page by clicking on the “Manage Users” button under “Account Administration” in the navigation menu.</p> <p>NCR VOYIX Home Invoices Orders Key Management <u>Account Administration</u> Start Ordering <input type="button" value="Globe"/> <input type="button" value="Bell"/> <input type="button" value="Help"/> Your Name</p> <p>Manage Users Manage Customers Manage Subscriptions (Autopay) <input type="button" value="My Customers"/></p> <p>McDonald's Communications Portal Useful information for the owner/operator community</p> <p><input type="button" value="Enter"/></p> |

2

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



3

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

 A screenshot of a 'Create New User' pop-up form. The form has a title bar with a close button (X). It contains several input fields: 'First Name', 'Last Name', 'Email Address', and 'Confirm Email Address'. Below these is a 'Select User Role' dropdown menu. There is also a language selection dropdown menu currently set to 'English'. At the bottom, there is a radio button group for 'Enable IP Restriction' with 'Yes' and 'No' options, where 'No' is selected. A purple 'Continue' button is located at the bottom right of the form.

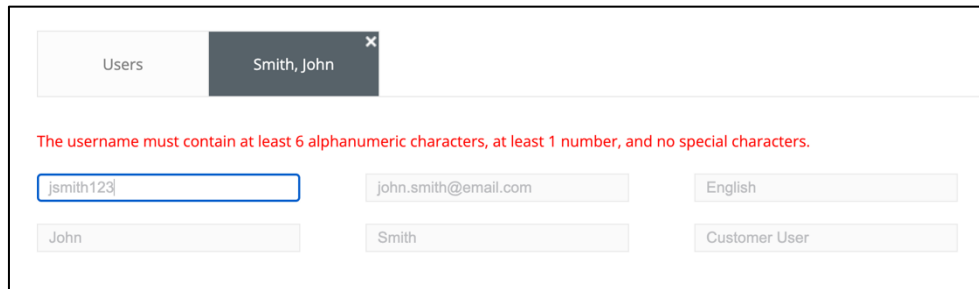
NOTE: During this process, under "Select User Role", you will choose whether the new user will be a Customer Admin or Customer User. If you select "Admin", the new user will have full access to all Customer Portal's features, and the ability to manage other users. Use this access carefully and *only 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.

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.



The screenshot shows a user creation interface. At the top, there is a header with 'Users' and a dropdown menu showing 'Smith, John' with a close icon. Below the header, a red error message states: 'The username must contain at least 6 alphanumeric characters, at least 1 number, and no special characters.' The form contains several input fields: a username field with 'jsmith123' (highlighted with a blue border), an email field with 'john.smith@email.com', a language field with 'English', a first name field with 'John', a last name field with 'Smith', and a role field with 'Customer User'.

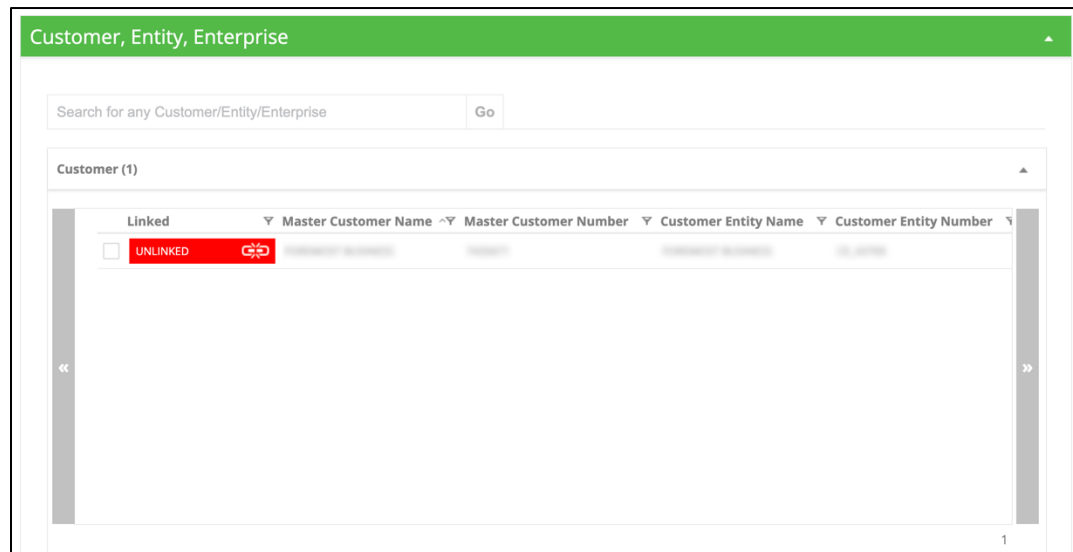
5

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 under which the national store numbers are associated.
- The Entity level is a group of Master Customer Numbers.
- The Enterprise level is the highest identifier and includes all 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 to the Entity level, click on the “Entity” section then click the red “UNLINKED” button. It will change to a green “LINKED” button for each Entity selected. This will give the user access to all NCR VOYIX Master Customer Numbers which are associated with that Entity.

Customer (1)

Entity (1)

| Linked | Customer Entity Name | Customer Entity Number | Enterprise Name | Enterprise Number |
|-----------------------------------|----------------------|------------------------|-----------------|-------------------|
| <input type="checkbox"/> UNLINKED | | | | |

Enterprise (1)

To link the user to the Enterprise level, click on the “Enterprise” section then click the red “UNLINKED” button. It will change to a green “LINKED” button for each Entity selected. This will give the user access to all NCR VOYIX Master Customer Numbers which are associated with that Entity.

Customer (1)

Entity (1)

Enterprise (1)

| Linked | Enterprise Name | Enterprise Number |
|-----------------------------------|-----------------|-------------------|
| <input type="checkbox"/> UNLINKED | | |

6

Next, under “Assign Groups and Permissions” you will grant permissions to your new user. You can grant permission to Invoices, Invoice Disputes, Orders or Place Order, 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.

Assign Groups and Permissions

Profile Preference: User Group Permission Use Individually Set Permission

Sorry, no groups assigned at this time.

Portlet Permissions

Invoices: Yes No
 Manage Users: Yes No
 Invoice Disputes: Yes No
 Orders: Yes No
 Online Ordering: Yes No
 Key Management: Yes No

RESET TO DEFAULT PERMISSIONS

Special Permissions

Request Application Access

Cancel Save

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 user can turn permissions back to “yes” within their own profile.*

7

Next, under “Request Application Access”, you can decide if the new user will have access to the Deployment Tracking application. To request access, click on the green “Request Access” text.

Request Application Access

All

| Application Name | Description | Groups | Request Status | Date Requested | Requested By |
|---|--|--------|----------------|----------------|--------------|
| NCR Support Hub | NCR Support Hub application for salesforce cloud experience | | Request Access | | |
| TrackSphere | TrackSphere app POC | | Request Access | | |
| Alpha Update | Alpha Update is a web based application that allows customers to download patches and other modules. | | Request Access | | |
| Hardware Kit Instruction Documents - RETNDS | Download site for Retail hardware kit instruction documents | | Request Access | | |
| Service Partner View - SmartIT | Service Partner View - SmartIT | | Request Access | | |

8

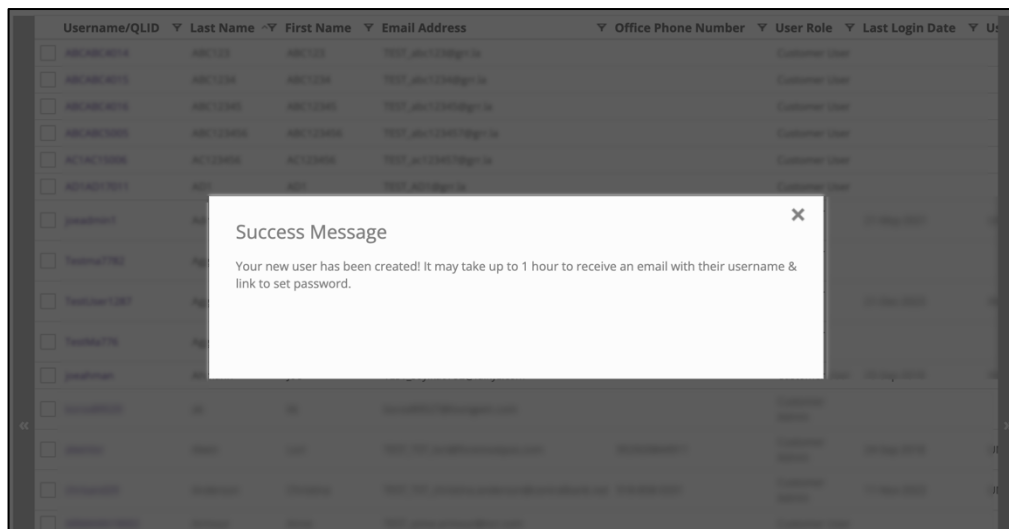
After you have completed all the information for the new user, click the Save button.

The screenshot shows a user creation form with the following elements:

- Header: "Users" and "Patterson, John" with a close button.
- Validation message: "The username must contain at least 6 alphanumeric characters, at least 1 number, and no special characters."
- Form fields: "Username *", "email@email.com", "English", "John", "Patterson", "Customer Admin".
- Dropdown menus: "Customer, Entity, Enterprise", "Assign Groups and Permissions", "Request Application Access" (highlighted in green), and "All".
- Buttons: "Cancel" and "Save" (highlighted with a red box).

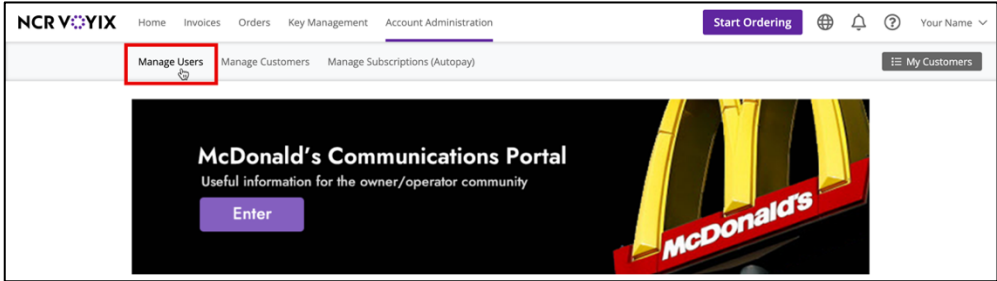
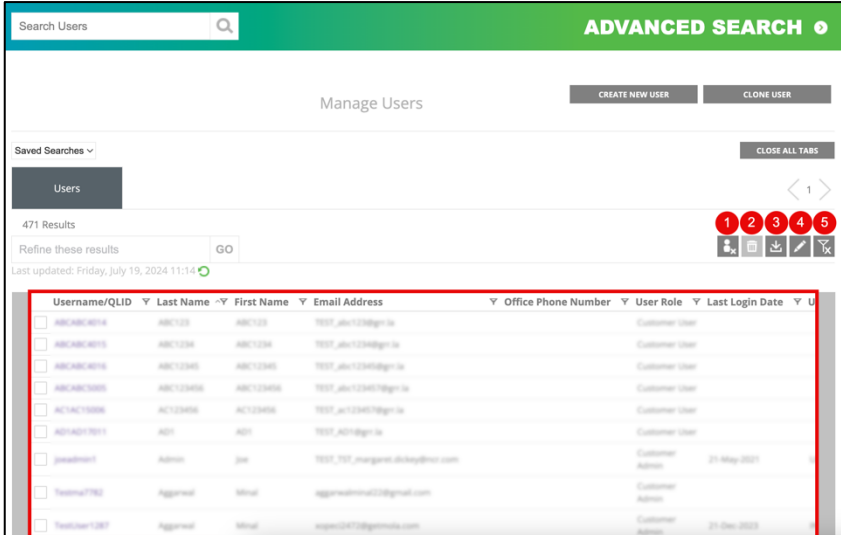
9

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 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 withing the user's profile page.

Managing users

| Step | Action |
|------|--|
| 1 | <p>From the Customer Portal homepage, access the Manage Users page by clicking on the “Manage Users” button under “Account Administration” in the navigation menu.</p>  |
| 2 | <p>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:</p> <ol style="list-style-type: none"> 1. Disable users 2. Delete users 3. Download the report 4. Edit Columns 5. Clear filters  |

3

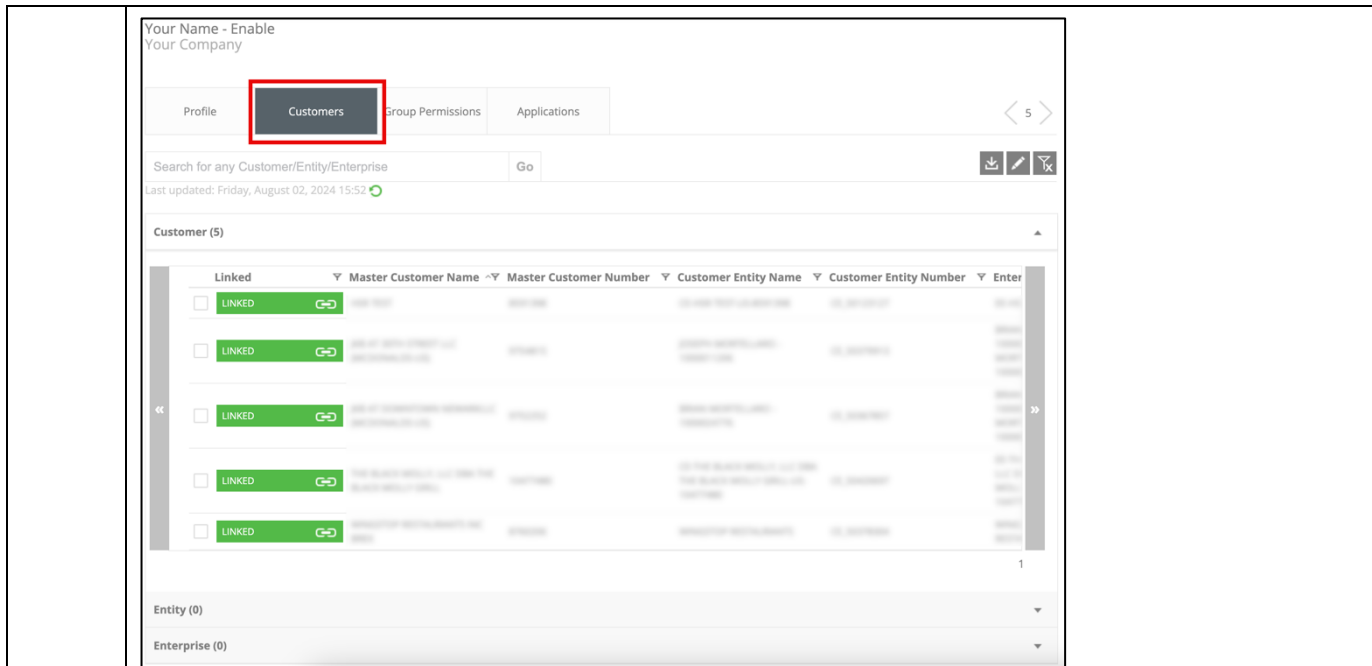
There are two ways that you can search for users:

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

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

| 4 | <p>Once you have found the user, click on the green username to open the user's profile page.</p>  <p>6 Results</p> <p>Refine these results <input type="button" value="Go"/></p> <p>Last updated: Monday, July 22, 2024 12:57 </p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Username/QLID</th> <th>Last Name</th> <th>First Name</th> <th>Email Address</th> <th>Office Phone Number</th> <th>User Role</th> <th>Last Login Date</th> <th>User Country</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>test12345</td> <td>McCallum</td> <td>Test</td> <td>test12345@nocr.com</td> <td></td> <td>Customer User</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>test12346</td> <td>McCallum</td> <td>Test</td> <td>test12346@nocr.com</td> <td></td> <td>Customer User</td> <td>21-Mar-2024</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>test12347</td> <td>Cherton</td> <td>Wyle</td> <td>test12347@gmail.com</td> <td></td> <td>Customer User</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>test12348</td> <td>Singh</td> <td>Harnak</td> <td>test_701_harnak.singh@nocr.com</td> <td></td> <td>Customer Admin</td> <td>07-Dec-2019</td> <td>INDIA</td> </tr> <tr> <td><input type="checkbox"/></td> <td>test12349</td> <td>Test</td> <td>Test</td> <td>test12349@nocr.com</td> <td></td> <td>Customer User</td> <td>05-Dec-2023</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>test12350</td> <td>Testing</td> <td>Auto</td> <td>test12350@gmail.com</td> <td></td> <td>Customer User</td> <td>21-Mar-2024</td> <td></td> </tr> </tbody> </table> | <input type="checkbox"/> | Username/QLID | Last Name | First Name | Email Address | Office Phone Number | User Role | Last Login Date | User Country | <input type="checkbox"/> | test12345 | McCallum | Test | test12345@nocr.com | | Customer User | | | <input type="checkbox"/> | test12346 | McCallum | Test | test12346@nocr.com | | Customer User | 21-Mar-2024 | | <input type="checkbox"/> | test12347 | Cherton | Wyle | test12347@gmail.com | | Customer User | | | <input type="checkbox"/> | test12348 | Singh | Harnak | test_701_harnak.singh@nocr.com | | Customer Admin | 07-Dec-2019 | INDIA | <input type="checkbox"/> | test12349 | Test | Test | test12349@nocr.com | | Customer User | 05-Dec-2023 | | <input type="checkbox"/> | test12350 | Testing | Auto | test12350@gmail.com | | Customer User | 21-Mar-2024 | |
|--------------------------|---|--------------------------|---------------|--------------------------------|---------------------|----------------|---------------------|--------------|-----------------|--------------|--------------------------|-----------|----------|------|--------------------|--|---------------|--|--|--------------------------|-----------|----------|------|--------------------|--|---------------|-------------|--|--------------------------|-----------|---------|------|---------------------|--|---------------|--|--|--------------------------|-----------|-------|--------|--------------------------------|--|----------------|-------------|-------|--------------------------|-----------|------|------|--------------------|--|---------------|-------------|--|--------------------------|-----------|---------|------|---------------------|--|---------------|-------------|--|
| <input type="checkbox"/> | Username/QLID | Last Name | First Name | Email Address | Office Phone Number | User Role | Last Login Date | User Country | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | test12345 | McCallum | Test | test12345@nocr.com | | Customer User | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | test12346 | McCallum | Test | test12346@nocr.com | | Customer User | 21-Mar-2024 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | test12347 | Cherton | Wyle | test12347@gmail.com | | Customer User | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | test12348 | Singh | Harnak | test_701_harnak.singh@nocr.com | | Customer Admin | 07-Dec-2019 | INDIA | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | test12349 | Test | Test | test12349@nocr.com | | Customer User | 05-Dec-2023 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | test12350 | Testing | Auto | test12350@gmail.com | | Customer User | 21-Mar-2024 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | <p>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.</p>  <p>Patterson, John Enable NCR VOYIX</p> <p>Profile Customers Group Permissions Applications</p> <p>EDIT USER PROFILE </p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 | <p>Profile tab</p> <p>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.</p> <p>NOTE: You can also change the User Role for a user.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

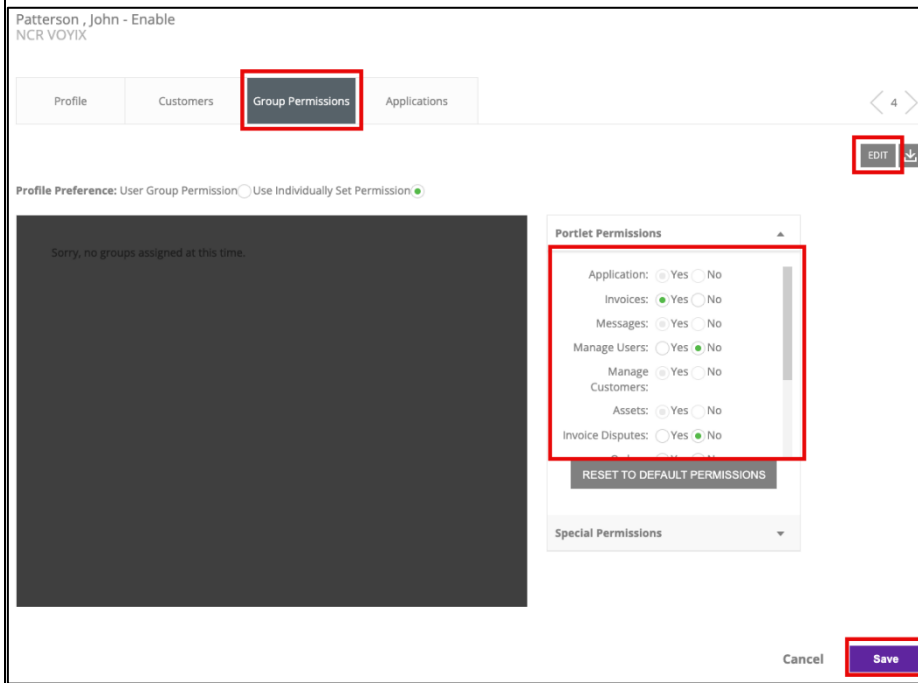
| | |
|----------|---|
| | <p>Patterson, John - Enable NCR VOYIX</p> <p>Profile Customers Group Permissions Applications</p> <p>EDIT USER PROFILE</p> <p>Profile</p> <p>*Username: testATLE001</p> <p>User Role: Customer User</p> <p>Partner Features: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>First Name: Test</p> <p>*Last Name: test@ncc.com</p> <p>*Job Title: Select One</p> <p>*eMail Address: test@ncc.com</p> <p>*Confirm eMail Address:</p> <p>Office Phone #:</p> <p>Mobile Phone #:</p> <p>Address:</p> <p>City:</p> <p>State:</p> <p>Postal Code:</p> <p>*Country: Select One</p> <p>Language: English</p> <p>Enable IP Restriction: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>* Mandatory fields</p> <p>Save Cancel</p> <p>Notification Preferences</p> <p>Customer Status has changed <input checked="" type="radio"/> Opt In <input type="radio"/> Opt Out</p> <p>Administration <input checked="" type="radio"/> Opt In <input type="radio"/> Opt Out</p> <p>Daily New Invoice Summary <input type="radio"/> Opt In <input checked="" type="radio"/> Opt Out</p> <p>Notification Delivery Preference: Both</p> <p>Special Permissions</p> <p>Cross EE/HMP Access <input type="radio"/> Enabled <input checked="" type="radio"/> Disabled</p> |
| <p>7</p> | <p>Customers tab</p> <p>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 need access, or vice versa.</p> |



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, click Save.



9

Applications tab




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


NOTE: If the user already has access to an application, you will see "Available" under Request status. It can be removed, if needed.


Patterson, John - Enable
NCR VOYIX

Profile Customers Group Permissions **Applications** < 4 >

5 Results

Refine your results Go   

Last updated: Monday, July 22, 2024 13:03 

All 

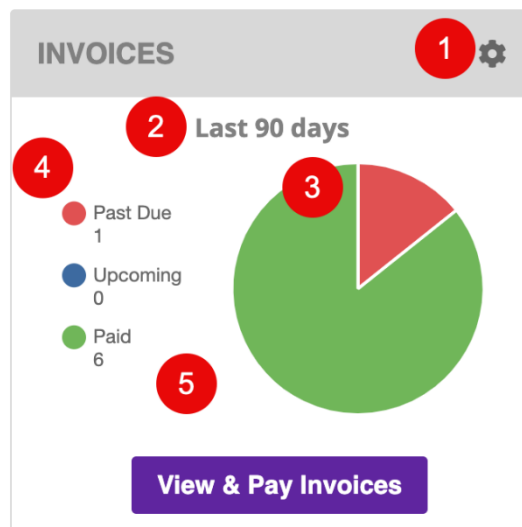
| Application Name | Description | Status Inquiry | Groups | Request Status | Date Request |
|--|---|----------------|--------|-----------------------|--------------|
| <input type="checkbox"/> My Support Link - CRM | Provides access to Support application to Services Customers and Partners. | | | Request Access | |
| <input type="checkbox"/> MIS Business Intelligence Dashboard | GDPI reporting console to monitor service levels, inventory and geographical trends. | | | Request Access | |
| <input type="checkbox"/> Hardware Kit Instruction Documents - RETIACIS | Download site for Retail hardware kit instruction documents. | | | Request Access | |
| <input type="checkbox"/> OLDC - L305 | Manages work orders, asset movement & all installed devices at master level for OLDC by serial number. It will interface with OT to provide up to date work order status by using GDPI interface. | | | Request Access | |
| <input type="checkbox"/> WACC (Miss, Add, Change, Cancel) | Miss, Add, Change, Cancel is a tool to improve asset tracking accuracy and timeliness by providing on-line management of asset entitlement to our customers and NCR account support personnel. | | | Request Access | |

1

Applications and Portlets

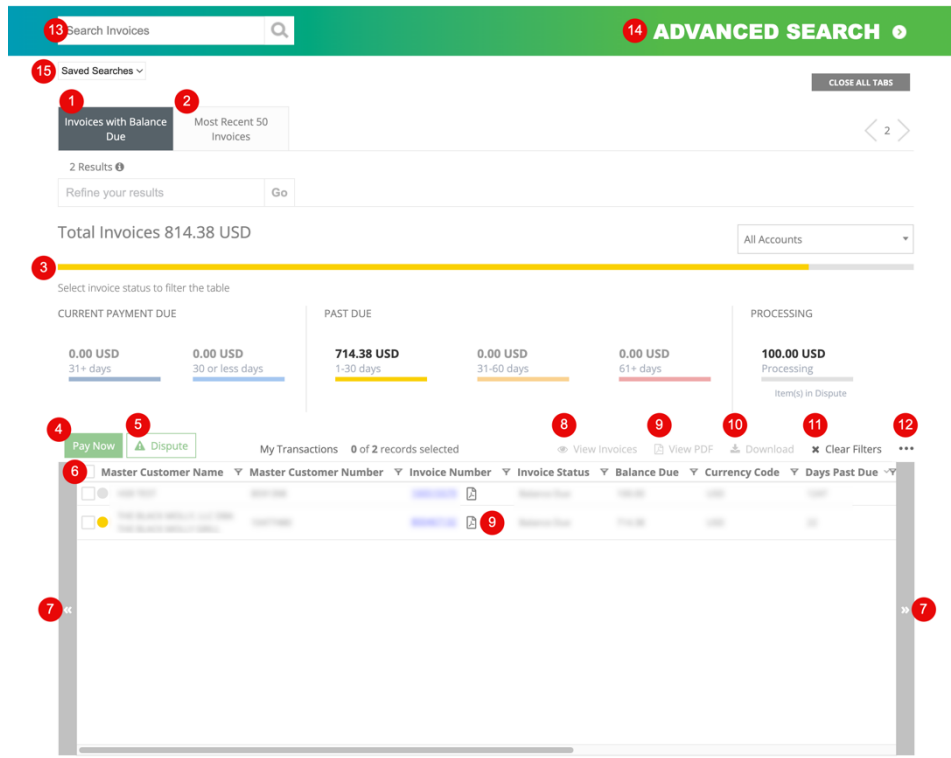
Invoices

Invoice Portlet



| Number | Description |
|--------|---|
| 1 | Settings: Changes pie chart settings |
| 2 | Date range: Shows date range for what is displayed in pie chart |
| 3 | Pie Chart: Quick view of invoice status set in settings |
| 4 | Legend: Details color display of pie chart |
| 5 | Access Invoice Page: Click anywhere on the white space to access the Invoice page |

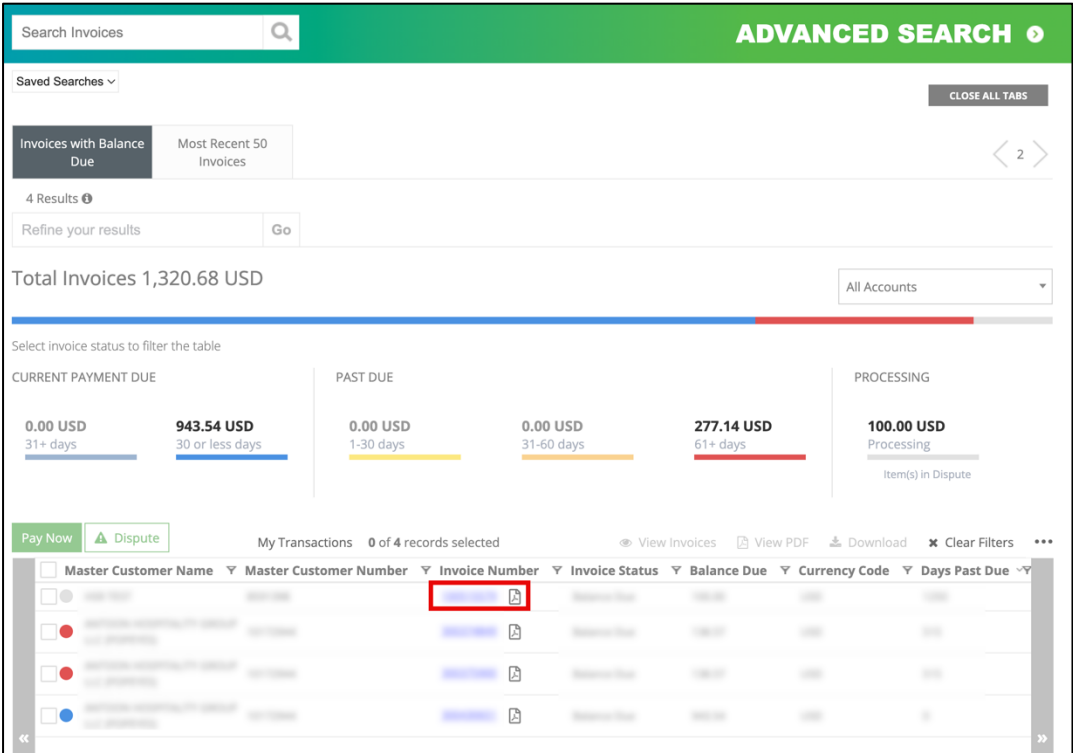
Invoice Page



| Number | Description |
|--------|--|
| 1 | Invoices with Balance Due tab: Default report for invoices that have a balance due |
| 2 | Most Recent 50 Invoices tab: Default report for 50 most recent invoices |
| 3 | Dashboard of open invoice balances broken into upcoming, past due, and payment in process categories. |
| 4 | Pay Now button: Select the invoices you want to pay and then click "Pay Now" to proceed to the payment page. |
| 5 | Dispute Invoice button: Allows you to submit an invoice for dispute |
| 6 | Report/Data table: Report of highlighted tab. |

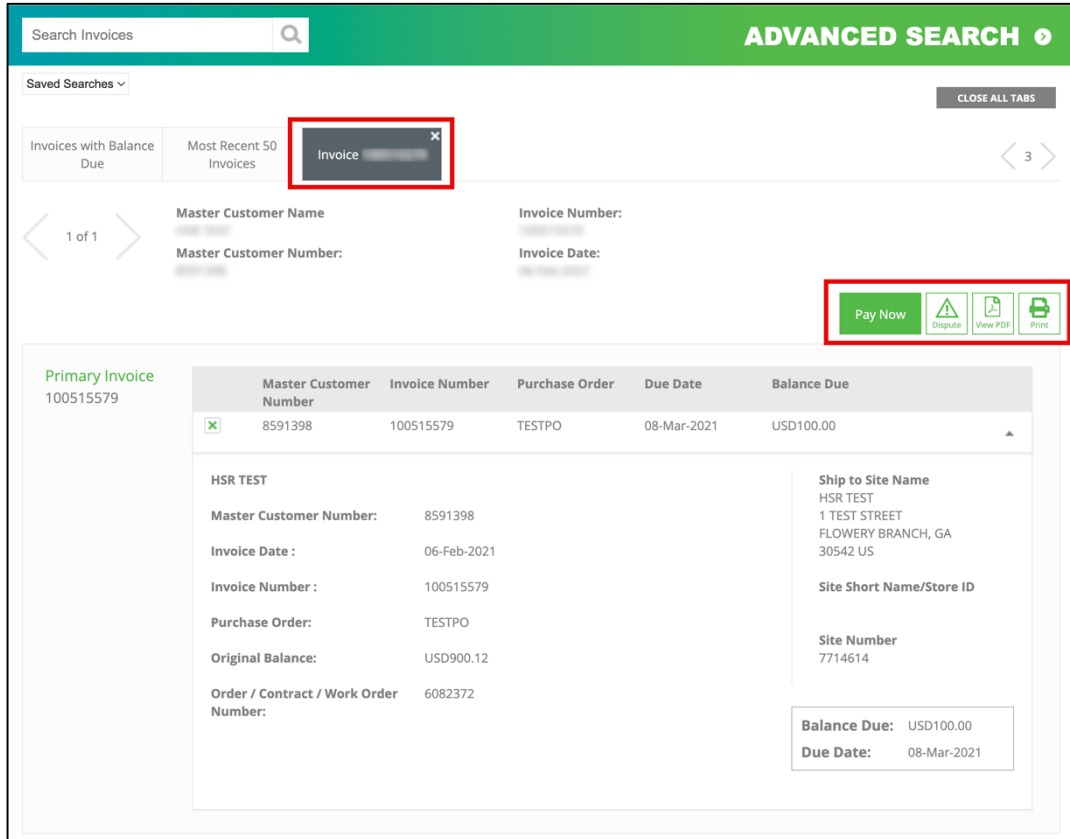
| | |
|----|--|
| 7 | Lateral scrolling bars: Allows you to scroll to the left or right by clicking on the bar |
| 8 | View Invoice button: View multiple invoices at once by using the checkboxes then clicking this button |
| 9 | View PDF button: View one or multiple invoice PDFs by using the checkboxes and clicking this button |
| 10 | Download Search Results button: Download search results report to excel, text file or .csv |
| 11 | Clear Filters button: Clears the filters which you have set on all columns |
| 12 | More Actions button: Includes the ability to <ul style="list-style-type: none"> - Edit Columns: Adds or removes additional columns to your data table - Refresh: Refreshes table results |
| 13 | Basic Search: Allows you to enter a search term for an invoice across all search fields |
| 14 | Advanced Search: Displays a drop-down list of fields to create more specific searches |
| 15 | Saved Searches: Displays a drop-down list of advanced searches you have saved |

Viewing an Invoice

| Step | Action |
|------|--|
| 1 | <p>To view a specific invoice, click on the desired invoice number, located under the "Invoice Number" column.</p>  |

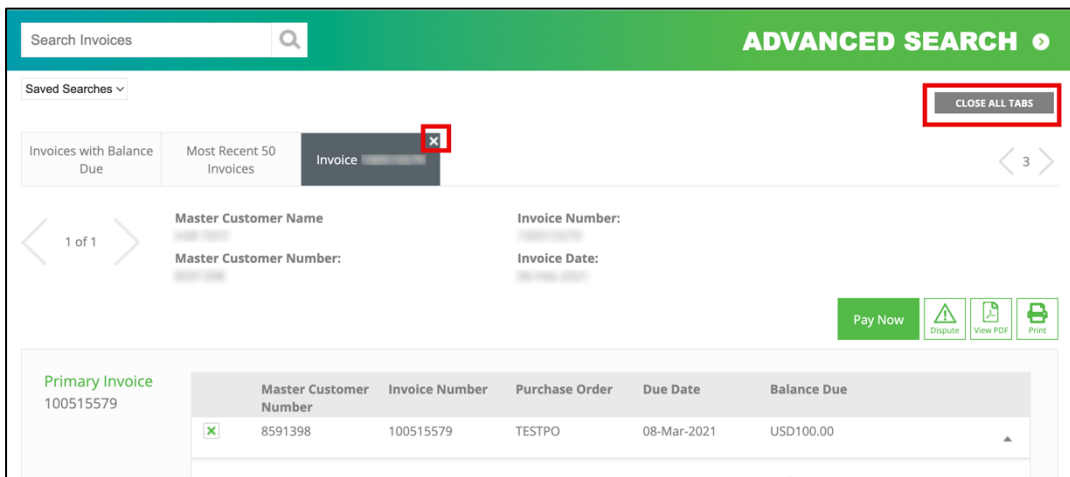
2

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

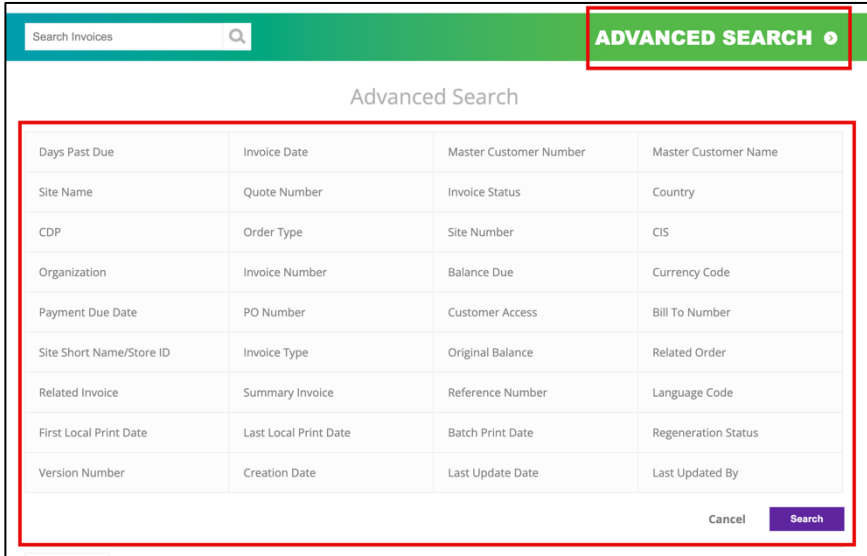
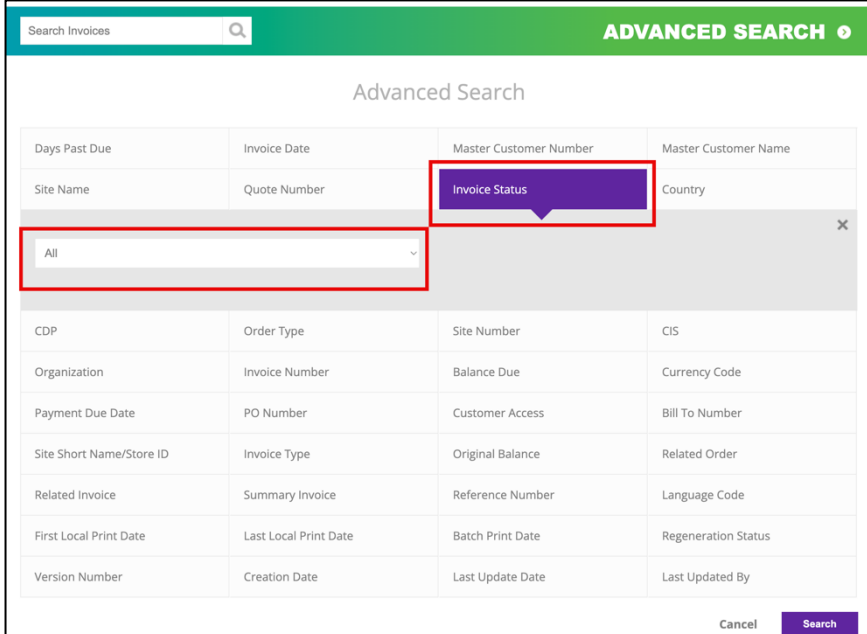


3

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



Using Advanced Search

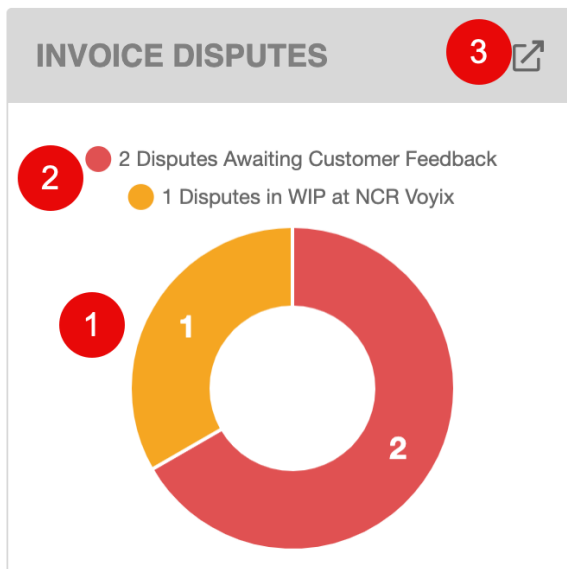
| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|---|------------------------|----------------------|------------------------|----------------------|-----------|--------------|----------------|---------|-----|------------|-------------|-----|--------------|----------------|-------------|---------------|------------------|-----------|-----------------|----------------|--------------------------|--------------|------------------|---------------|-----------------|-----------------|------------------|---------------|------------------------|-----------------------|------------------|---------------------|----------------|---------------|------------------|-----------------|
| 1 | <p>From the "Invoice" page, click on the "Advanced Search" button for a drop-down list of fields you may use for searching.</p>  <p>The screenshot shows the 'Advanced Search' interface. At the top, there is a search bar labeled 'Search Invoices' and a green header with the text 'ADVANCED SEARCH' and a dropdown arrow. Below the header is a table of search fields:</p> <table border="1"> <tr> <td>Days Past Due</td> <td>Invoice Date</td> <td>Master Customer Number</td> <td>Master Customer Name</td> </tr> <tr> <td>Site Name</td> <td>Quote Number</td> <td>Invoice Status</td> <td>Country</td> </tr> <tr> <td>CDP</td> <td>Order Type</td> <td>Site Number</td> <td>CIS</td> </tr> <tr> <td>Organization</td> <td>Invoice Number</td> <td>Balance Due</td> <td>Currency Code</td> </tr> <tr> <td>Payment Due Date</td> <td>PO Number</td> <td>Customer Access</td> <td>Bill To Number</td> </tr> <tr> <td>Site Short Name/Store ID</td> <td>Invoice Type</td> <td>Original Balance</td> <td>Related Order</td> </tr> <tr> <td>Related Invoice</td> <td>Summary Invoice</td> <td>Reference Number</td> <td>Language Code</td> </tr> <tr> <td>First Local Print Date</td> <td>Last Local Print Date</td> <td>Batch Print Date</td> <td>Regeneration Status</td> </tr> <tr> <td>Version Number</td> <td>Creation Date</td> <td>Last Update Date</td> <td>Last Updated By</td> </tr> </table> <p>At the bottom right of the table, there are 'Cancel' and 'Search' buttons.</p> | Days Past Due | Invoice Date | Master Customer Number | Master Customer Name | Site Name | Quote Number | Invoice Status | Country | CDP | Order Type | Site Number | CIS | Organization | Invoice Number | Balance Due | Currency Code | Payment Due Date | PO Number | Customer Access | Bill To Number | Site Short Name/Store ID | Invoice Type | Original Balance | Related Order | Related Invoice | Summary Invoice | Reference Number | Language Code | First Local Print Date | Last Local Print Date | Batch Print Date | Regeneration Status | Version Number | Creation Date | Last Update Date | Last Updated By |
| Days Past Due | Invoice Date | Master Customer Number | Master Customer Name | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Site Name | Quote Number | Invoice Status | Country | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CDP | Order Type | Site Number | CIS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Organization | Invoice Number | Balance Due | Currency Code | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Payment Due Date | PO Number | Customer Access | Bill To Number | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Site Short Name/Store ID | Invoice Type | Original Balance | Related Order | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Related Invoice | Summary Invoice | Reference Number | Language Code | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| First Local Print Date | Last Local Print Date | Batch Print Date | Regeneration Status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Version Number | Creation Date | Last Update Date | Last Updated By | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | <p>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".</p>  <p>The screenshot shows the 'Advanced Search' interface with the 'Invoice Status' field selected. A dropdown menu is open, showing 'All' as the selected option. The 'Search' button is highlighted with a red box.</p> <p>The screenshot shows the 'Advanced Search' interface. At the top, there is a search bar labeled 'Search Invoices' and a green header with the text 'ADVANCED SEARCH' and a dropdown arrow. Below the header is a table of search fields:</p> <table border="1"> <tr> <td>Days Past Due</td> <td>Invoice Date</td> <td>Master Customer Number</td> <td>Master Customer Name</td> </tr> <tr> <td>Site Name</td> <td>Quote Number</td> <td>Invoice Status</td> <td>Country</td> </tr> <tr> <td>CDP</td> <td>Order Type</td> <td>Site Number</td> <td>CIS</td> </tr> <tr> <td>Organization</td> <td>Invoice Number</td> <td>Balance Due</td> <td>Currency Code</td> </tr> <tr> <td>Payment Due Date</td> <td>PO Number</td> <td>Customer Access</td> <td>Bill To Number</td> </tr> <tr> <td>Site Short Name/Store ID</td> <td>Invoice Type</td> <td>Original Balance</td> <td>Related Order</td> </tr> <tr> <td>Related Invoice</td> <td>Summary Invoice</td> <td>Reference Number</td> <td>Language Code</td> </tr> <tr> <td>First Local Print Date</td> <td>Last Local Print Date</td> <td>Batch Print Date</td> <td>Regeneration Status</td> </tr> <tr> <td>Version Number</td> <td>Creation Date</td> <td>Last Update Date</td> <td>Last Updated By</td> </tr> </table> <p>At the bottom right of the table, there are 'Cancel' and 'Search' buttons.</p> | Days Past Due | Invoice Date | Master Customer Number | Master Customer Name | Site Name | Quote Number | Invoice Status | Country | CDP | Order Type | Site Number | CIS | Organization | Invoice Number | Balance Due | Currency Code | Payment Due Date | PO Number | Customer Access | Bill To Number | Site Short Name/Store ID | Invoice Type | Original Balance | Related Order | Related Invoice | Summary Invoice | Reference Number | Language Code | First Local Print Date | Last Local Print Date | Batch Print Date | Regeneration Status | Version Number | Creation Date | Last Update Date | Last Updated By |
| Days Past Due | Invoice Date | Master Customer Number | Master Customer Name | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Site Name | Quote Number | Invoice Status | Country | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CDP | Order Type | Site Number | CIS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Organization | Invoice Number | Balance Due | Currency Code | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Payment Due Date | PO Number | Customer Access | Bill To Number | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Site Short Name/Store ID | Invoice Type | Original Balance | Related Order | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Related Invoice | Summary Invoice | Reference Number | Language Code | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| First Local Print Date | Last Local Print Date | Batch Print Date | Regeneration Status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Version Number | Creation Date | Last Update Date | Last Updated By | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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 Save button to name and save your searches for faster access next time.

The screenshot displays the 'ADVANCED SEARCH' interface. At the top, there is a search bar labeled 'Search Invoices' and a green header with 'ADVANCED SEARCH'. Below the header, there are 'Saved Searches' and a 'CLOSE ALL TABS' button. A search result is shown as a tab labeled 'Search Results 1'. A dropdown menu is open, showing '3 Results' and options like 'Refresh', 'Edit Columns', and 'Save Search'. Below the search results, there is a table with columns: Master Customer Name, Master Customer Number, Invoice Number, Invoice Status, Balance Due, Currency Code, and Days Past Due. The table shows 0 of 3 records selected. There are also buttons for 'Pay Now', 'Wire', and 'Dispute'.

Invoice Disputes Portlet



| Number | Description |
|--------|--|
| 1 | Quick view of invoice disputes that are open and/or awaiting customer feedback |
| 2 | Legend: Details color display of quick view |
| 3 | Access Page button: Click to access Invoice Dispute page |

Orders

Orders Portlet

The screenshot shows the 'ORDERS' portlet interface. It features a header with the title 'ORDERS' and a red circle with the number '1' next to an external link icon. Below the header are three filter sections: 'Status:' with a dropdown menu showing 'All' and a red circle '2'; 'Range:' with a dropdown menu showing 'All Orders (Since January)' and a red circle '3'; and 'Search By:' with a dropdown menu showing 'PO Number' and a red circle '4'. At the bottom of the filter section is a search bar with a red circle '5' on the left and a search button with a magnifying glass icon and a red circle '6' on the right.

| 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 By: Drop-down lists of fields you can use to search for the terms entered in the Search bar |
| 6 | Search button: Click to perform the search using the terms selected above |

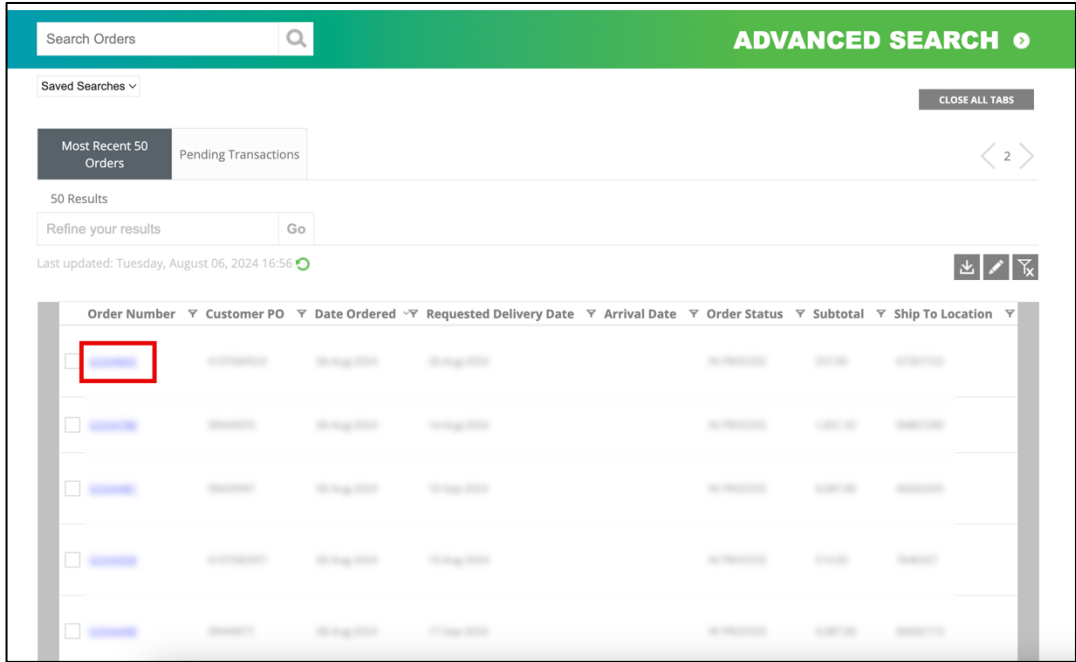
Orders Page

The screenshot shows the 'Orders Page' interface. At the top, there is a green header bar with a search box (10) and an 'ADVANCED SEARCH' button (11). Below the header, there is a 'Saved Searches' dropdown (12) and a 'CLOSE ALL TABS' button. The main content area features two tabs: 'Most Recent 50 Orders' (1) and 'Pending Transactions' (2). Below the tabs, it displays '50 Results' and a 'Refine your results' section with a 'Go' button. A 'Last updated' timestamp is shown, along with three icons (5, 6, 7) for download, edit, and delete. The main data table (3) has columns for Order Number, Customer PO, Date Ordered, Requested Delivery Date, Arrival Date, Order Status, Subtotal, and Ship To Location. A filter button (4) is located to the right of each column header. The table contains several rows of data. On the left and right sides of the table, there are vertical scroll bars (8).

| 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 yet 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 | Download Search Results button: Download search results reports to excel, text file or .csv |
| 6 | Add/Remove Columns button: Adds or removes additional columns to your data table |

| | |
|----|--|
| 7 | Clear Filters button: Clears the filters which you have set on all columns |
| 8 | Lateral scrolling bars: Allows you to scroll to the left or right by clicking and dragging the bar |
| 9 | Basic Search: Search for an order across all search fields |
| 10 | Advanced Search: Displays a drop-down list of fields create more specific searches |
| 11 | Saved Searches: Displays a drop-down list of advanced searches you have saved |

Viewing Order Details & Shipment Tracking

| Number | Description |
|--------|---|
| 1 | <p>To view the Order Details page for a specific order, click on the desired Order Number located under the "Order Number" column.</p>  |

2

The Order Details page will open in a new tab in the Customer Portal and display order detail information.

Search Orders **ADVANCED SEARCH**

Saved Searches CLOSE ALL TABS

Most Recent 50 Orders | Pending Transactions | **Order**

Master Customer Name: Order Number: Order Status: COMPLETE Order Date: Arrival Date:
 Master Customer Number: Quote Number: Order Subtotal: Order Type: Requested Delivery Date:
 Freight: Total Tax: Order Total: Notes:

Download

| Customer # | Customer Name | Purchase Order | Date Ordered: | Order Subtotal | FUA Site Name & Number | Ship To Site Name & Number | Bill To Site Name & Number |
|--------------------------|---------------|----------------|---------------|----------------|------------------------|----------------------------|----------------------------|
| <input type="checkbox"/> | | | | | | | |

| Quantity | Extended Price | Line Status | Actual Ship Date | Ship Method | Tracking Number |
|----------|----------------|-------------|------------------|--------------------------------|-----------------|
| | | Complete | | 3 Day-Surface-Standard Service | |
| | | Complete | | 3 Day-Surface-Standard Service | |

download functionality.

3

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

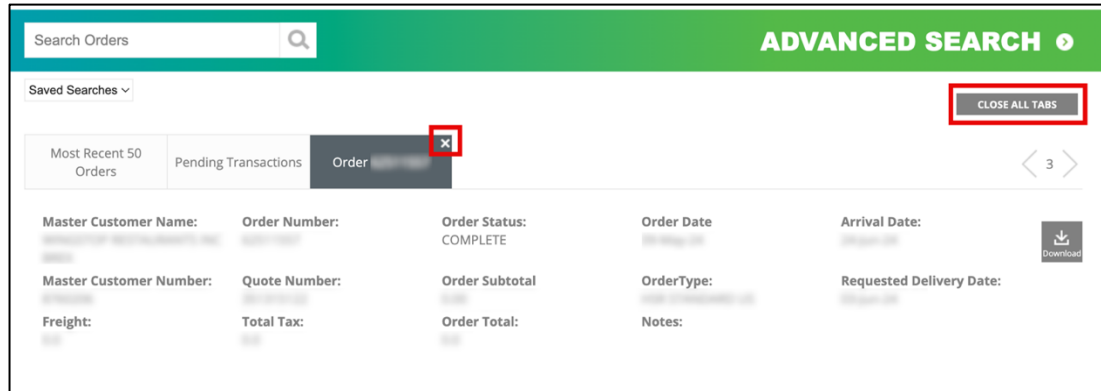
Customer # Customer Name Purchase Order Date Ordered: Order Subtotal FUA Site Name & Number Ship To Site Name & Number Bill To Site Name & Number

| Quantity | Extended Price | Line Status | Actual Ship Date | Ship Method | Tracking Number |
|----------|----------------|-------------|------------------|--------------------------------|-----------------|
| | | Complete | | 3 Day-Surface-Standard Service | |
| | | Complete | | 3 Day-Surface-Standard Service | |

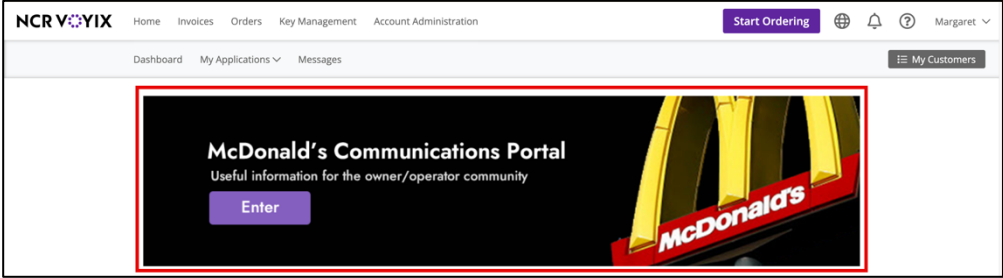
download functionality.

4

Once you are done using the Order Details page, click on the “x” in the tab or use the “CLOSE ALL TABS” button.



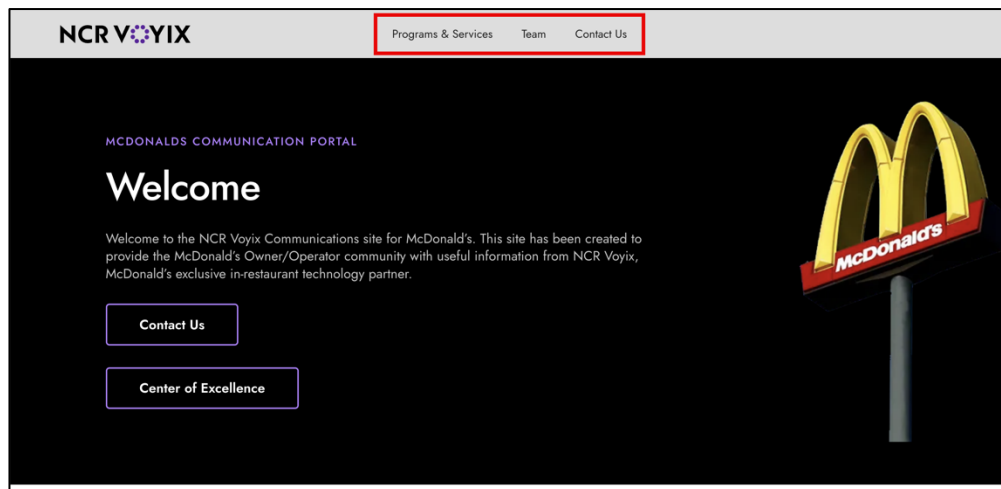
McDonald's Communications Portal

| Step | Action |
|------|--|
| 1 | <p>After logging into Customer Portal, the McDonald's Communication Portal portlet will be displayed at the top of the homepage. Click Enter to open the Communication Portal in a new browser tab.</p>  <p>The screenshot shows the NCR Voyix Customer Portal homepage. The top navigation bar includes 'Home', 'Invoices', 'Orders', 'Key Management', and 'Account Administration'. There is a 'Start Ordering' button and a user profile for 'Margaret'. Below the navigation bar, there is a 'Dashboard' section with 'My Applications' and 'Messages' links. The main content area features a 'McDonald's Communications Portal' portlet with the text 'Useful information for the owner/operator community' and an 'Enter' button. The portlet also displays the McDonald's logo.</p> |

2

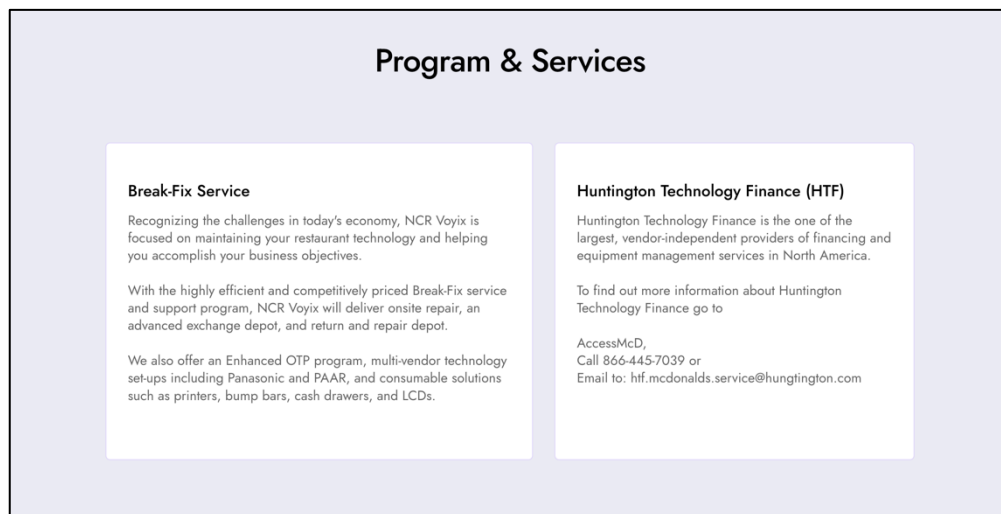
The McDonald's Communication Portal will open in a new browser tab. Here, you can use the header to navigate between the following sections:

- Programs & Services
- Team
- Contact Us



3

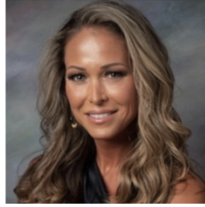
Programs and Services provides details on NCR VOYIX Programs & Services available to the McDonald's owner-operator committee.



4

Team provides bios on the NCR VOYIX McDonald's Account Executive team.

Meet the team



Amy Spytko
North American Sales Lead

Amy Spytko, based in New York, joined the Global NCR Voyix Sales team as an Account Executive handling the Central Region of the US in July, 2017. She came to NCR with 10 years of experience in which she focused primarily on McDonald's service and hardware sales for another vendor. Amy transitioned to the role of North American Sales Lead in 2024.

Phone: [315.327.8603](tel:315.327.8603)
Email: amy.spytko@ncrvoyix.com



Valencia Hunter
Sr. Account Executive,
Long Beach/Walnut Creek/ Mcopco

Valencia is based out of Atlanta, GA and began her career at NCR Voyix more than 20 years ago. For the past 16 years, Valencia's focus has been on the Hospitality industry. She began working with McDonald's in 2008, assisting the NCR McDonald's Canada team and has been working with the McDonald's US team since 2014 focusing on hardware/installation/and services sales for the Long Beach and Walnut Creek Field offices as well as all the McOpCo restaurants.

Phone: [404.840.6975](tel:404.840.6975)
Email: valencia.hunter@ncrvoyix.com



Brian Di Cianni
Account Executive, Chicago/Denver/Dallas

Brian is based out of Chicago, IL. He has more than 20 years working with the McDonald's Owner Operator and OTP Community. Brian began his career at NCR Voyix almost two years ago focusing on hardware/installation/and services sales for the Chicago/Denver and Dallas Field Offices.

Phone: [630.542.7288](tel:630.542.7288)
Email: brian.dicianni@ncrvoyix.com



Cameron Ogden
Account Executive, Nashville/Atlanta

Cameron is based out of Atlanta, GA and began her career with the Global NCR Voyix Sales team almost two years ago. Cameron's focus has been on the hardware/installation/and services sales for the Atlanta and Nashville Field offices.

Phone: [404.423.1006](tel:404.423.1006)
Email: cameron.ogden@ncrvoyix.com



Rob Ireland
Senior Account Executive
Stamford/Bethesda/Columbus

Rob Ireland, based out of North Carolina, joined NCR in 2014, and was responsible for handling large QSR deployment projects. Rob started working with the McDonald's Account in March of 2017 to assist with the formation and expansion of the Customer Care Team. After the successful establishment of the Customer Care Center team, Rob transitioned into his current role as an Account Executive focusing on hardware/installation/and services sales for the Stamford/Bethesda/and Columbus Field Offices.

Phone: [828.719.8236](tel:828.719.8236)
Email: rob.ireland@ncrvoyix.com

Deployment Tracking

For any additional information and assistance regarding customer inquiries please contact:

McDonalds Center of Excellence

Business Hours M-F 8am-8pm EST

mcdonalds.orders@ncrvoyix.com

1-800-421-8230 [in](#) [f](#) [X](#) [@](#)

Out of Business Hours: leave a voicemail or an email and the MCE will respond next business day.