McDonald's User Guide

Contents

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.

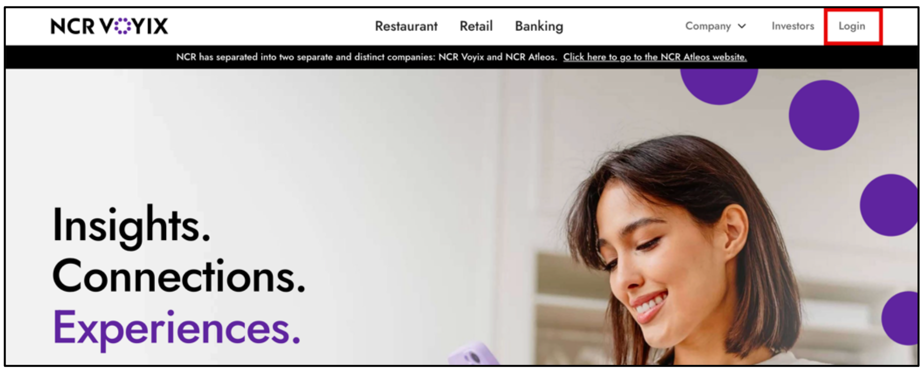
The Customer Portal provides NCR VOYIX customers with account management capabilities including invoicing, invoice disputes, site deployment tracking, and management of users. It is available for use (except during scheduled and announced maintenance time) 24 hours per day, 7 days a week, 365 days per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

Login, Navigation, and Profile

Logging In

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

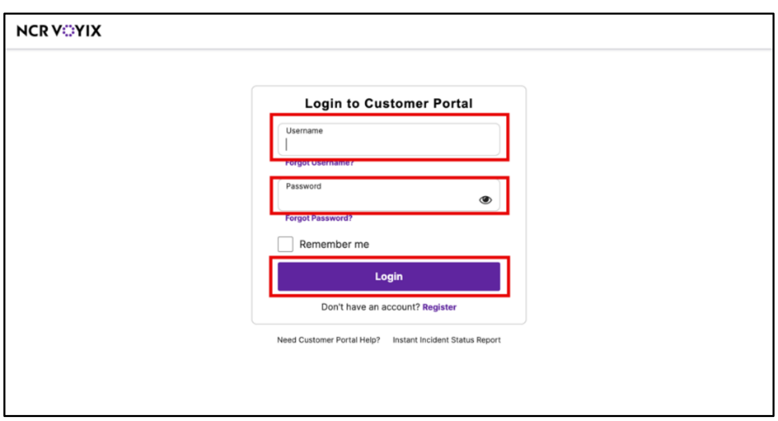
To access your Customer Portal account, go to NCR Voyix.com and click on the "Login" text in the upper right-hand corner of the page.



</td></tr>
<tr><td>2</td><td>

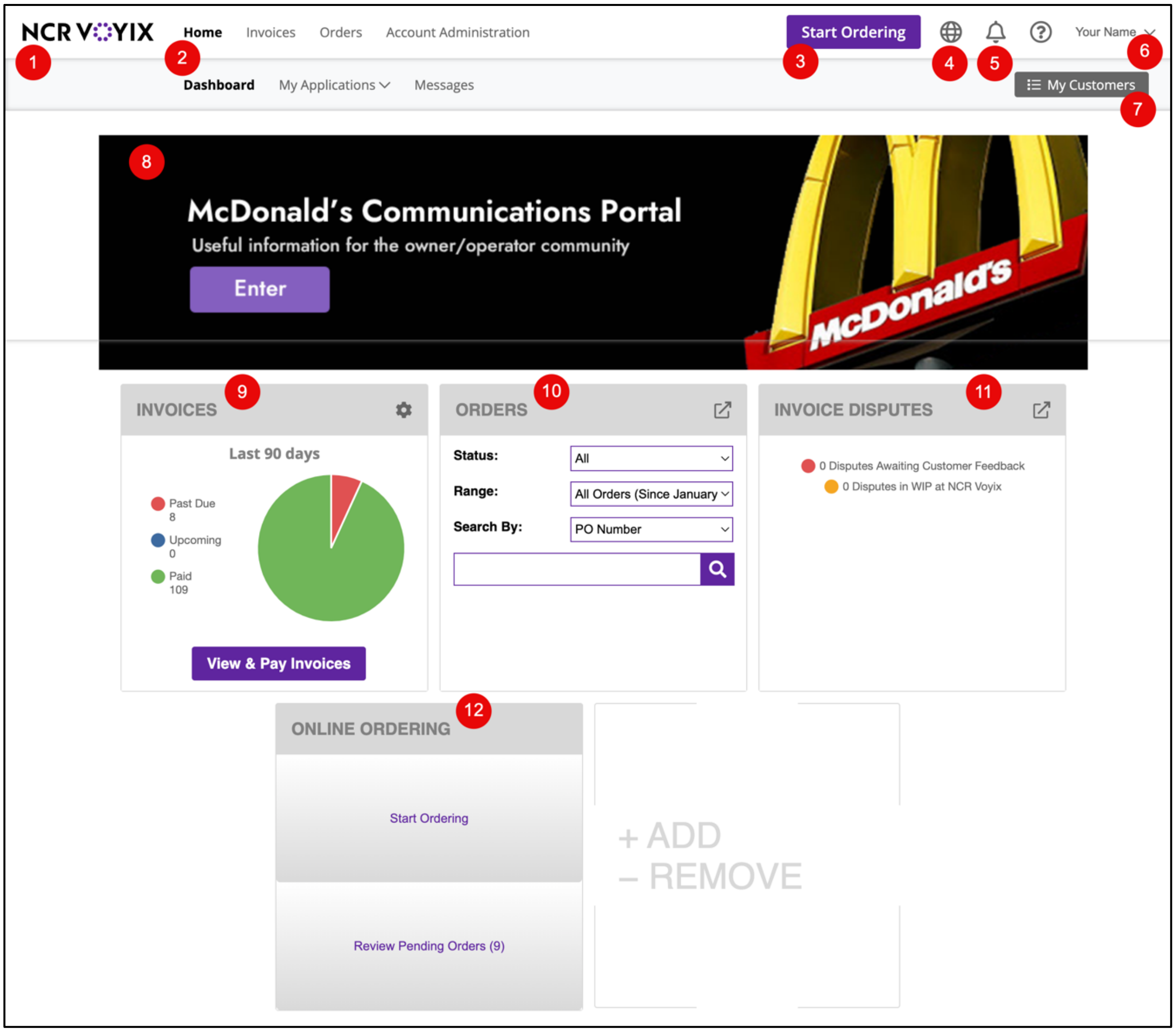
On the login page, enter your Username and Password; Then click "Login".

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 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.



</td></tr>
</table>

Customer Portal Homepage

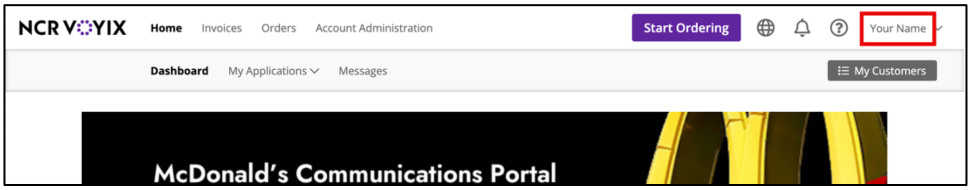


Number	Description
1	NCR VOYIX brand box: Click here to navigate back to the homepage at any time.
2	Navigation Menu: Click here to access Customer Portal features and capabilities.
3	"Start Ordering" button: Click here to navigate to online ordering.
4	"Language Preference" button: Click here to change 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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

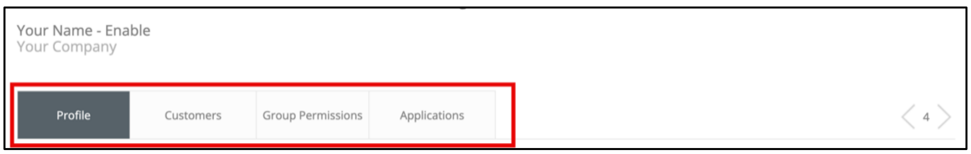
Access your profile page by clicking your name in the top right of the page.



</td></tr>
<tr><td>2</td><td>

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

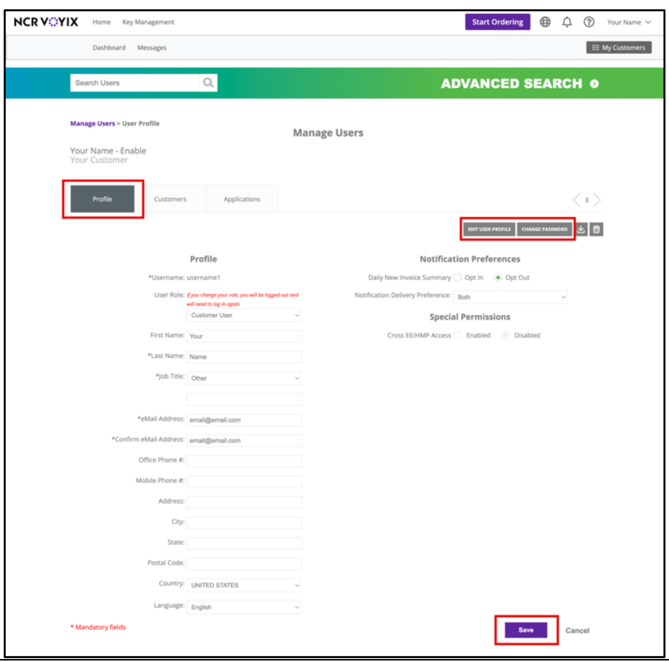
Profile, Customers, Group Permissions and Applications.



</td></tr>
<tr><td>3</td><td>

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.



</td></tr>
</table>

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<tr>
<td>4</td>
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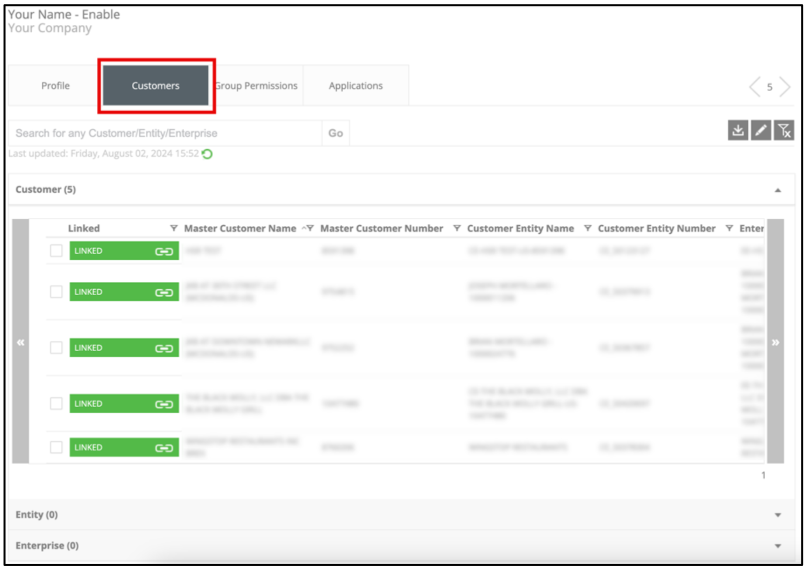
Customers Tab

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



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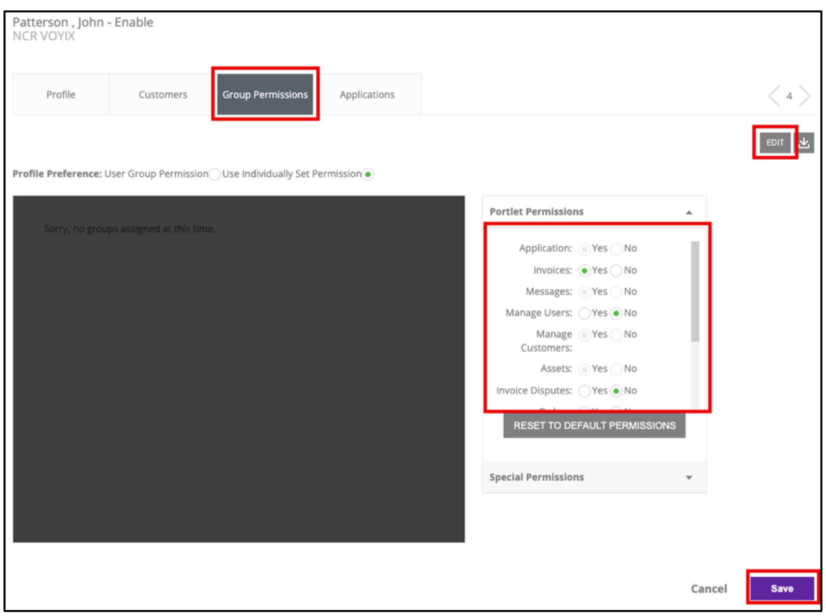
<td>

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.



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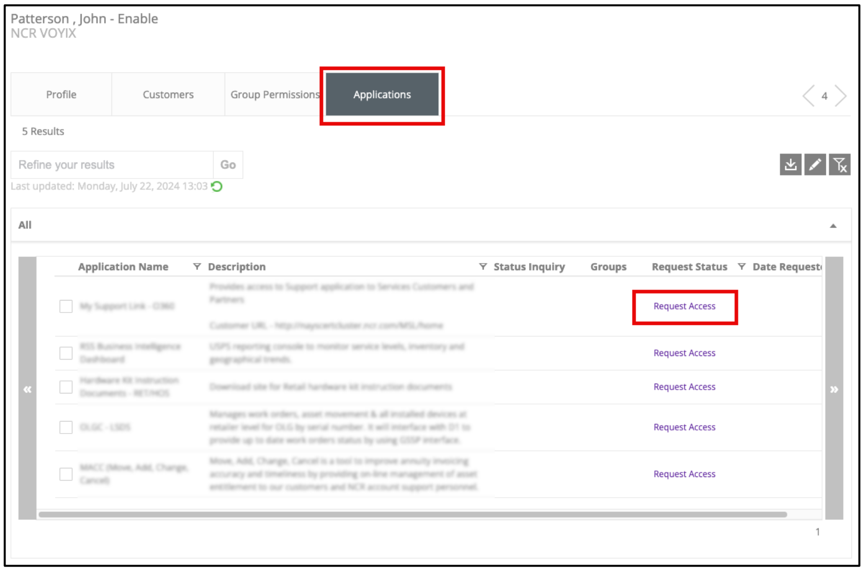
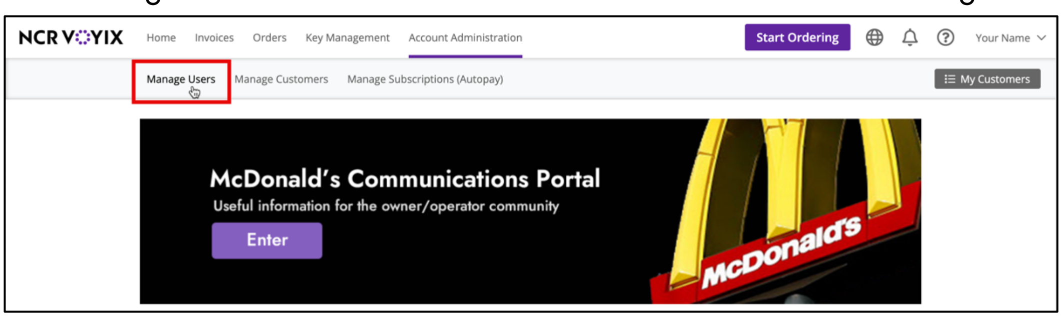
<table>
<tr><td>6</td><td>Applications Tab

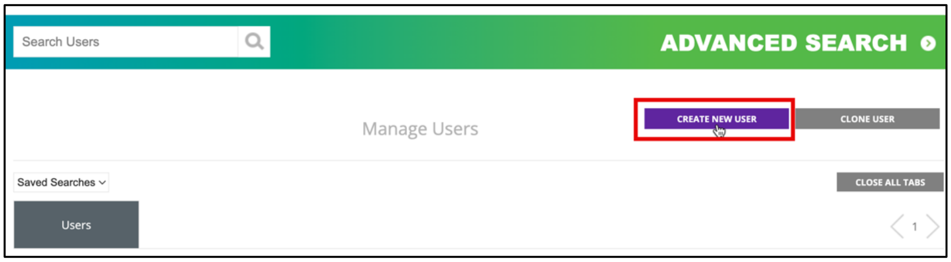
The applications tab will show a list of applications that are available for use and list any others that are available to request access to, if applicable.


</td></tr>
</table>

Creating New Users

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Customer Portal homepage, access the Manage Users page by clicking on the “Manage Users” button under “Account Administration” in the navigation menu.


</td></tr>
</table>

<table>
<tr>
<td>2</td>
<td>From the Manage Users page, click on the Create New User button.

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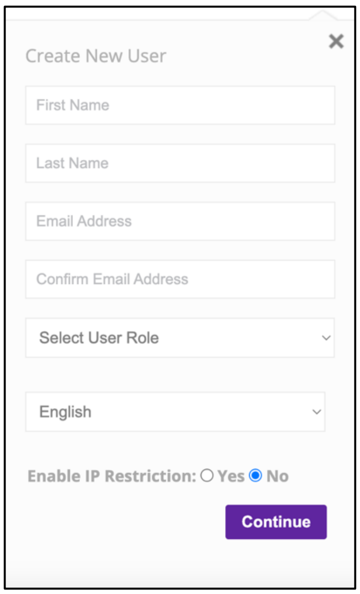
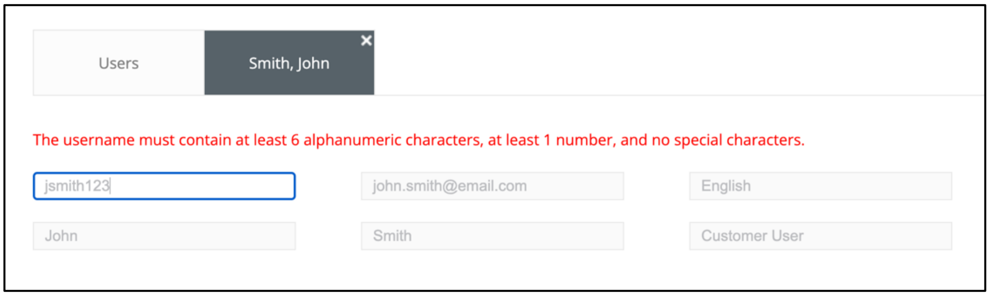
<td>3</td>
<td>Complete the pop-up form for the new user, and then click Continue.


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.</td>
</tr>
</table>

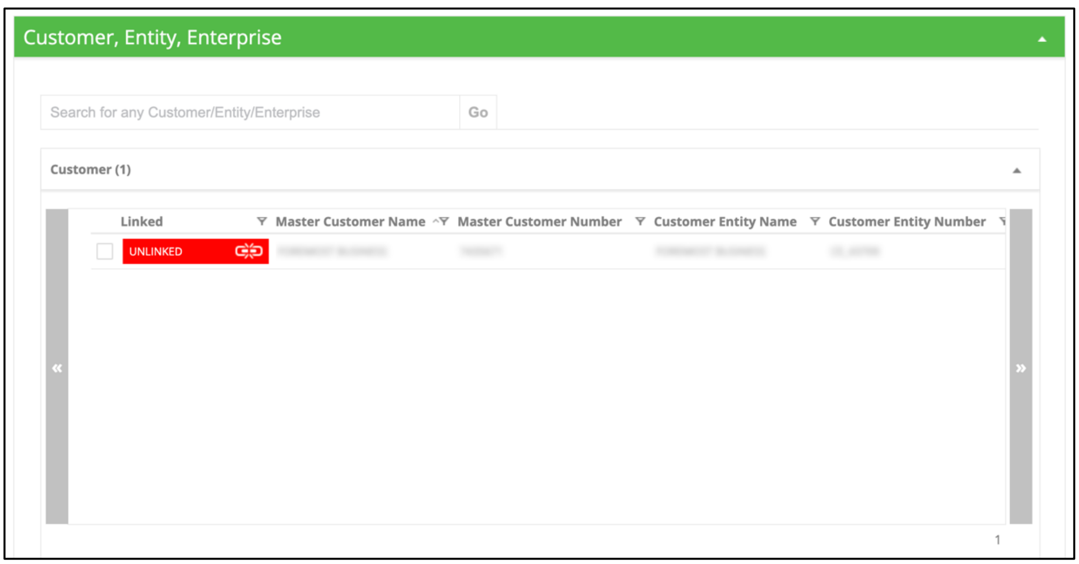
4	On the next page, you will complete the new user creation process. First, assign the new user a username. Usernames must contain at least 6 alphanumeric characters, at least 1 number, and no special characters. NOTE: The username cannot be changed later. 

<table>
<tr>
<td>5</td>
<td>
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.
</td>
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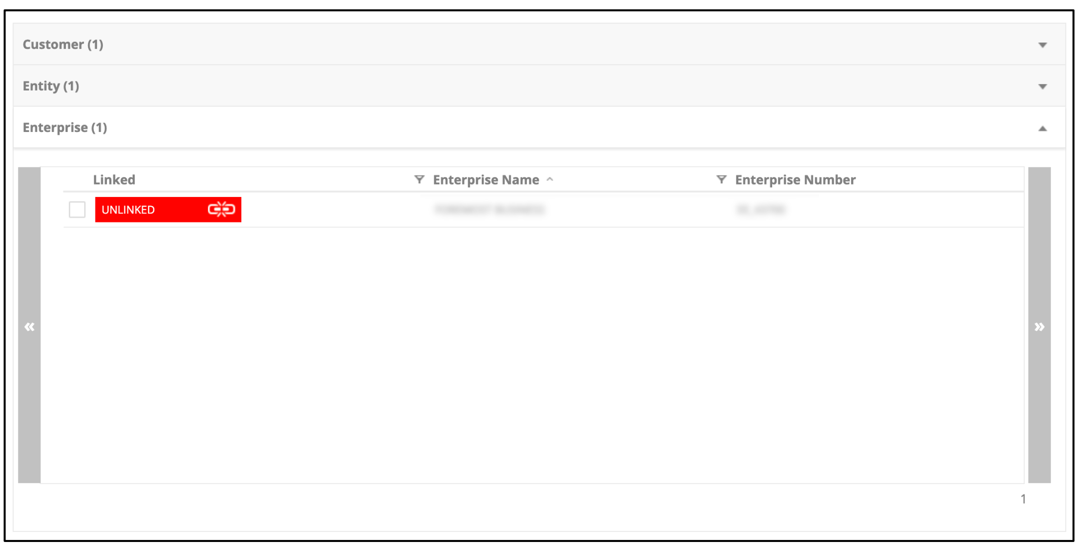
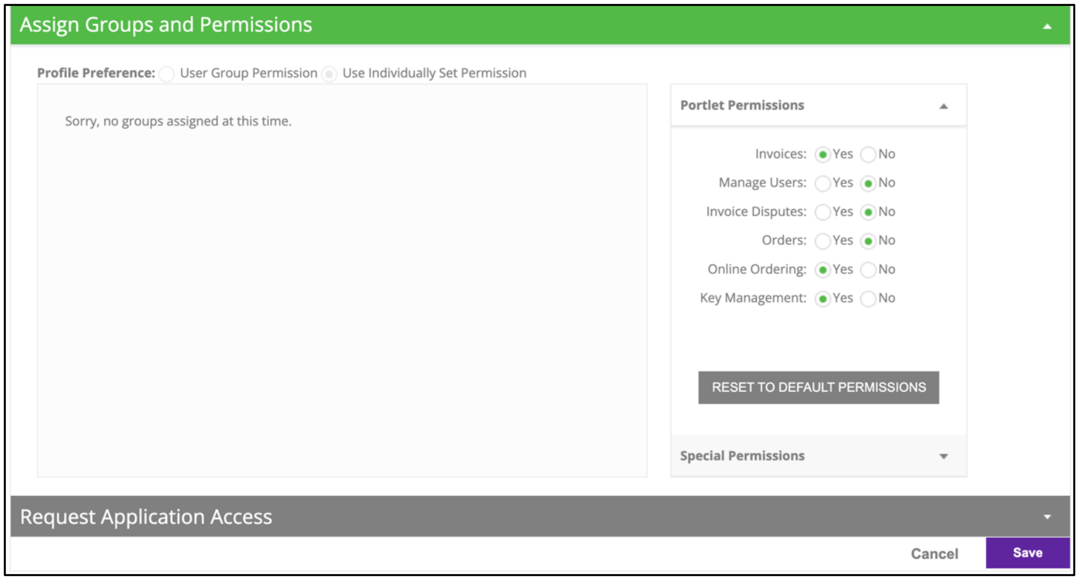
</table>

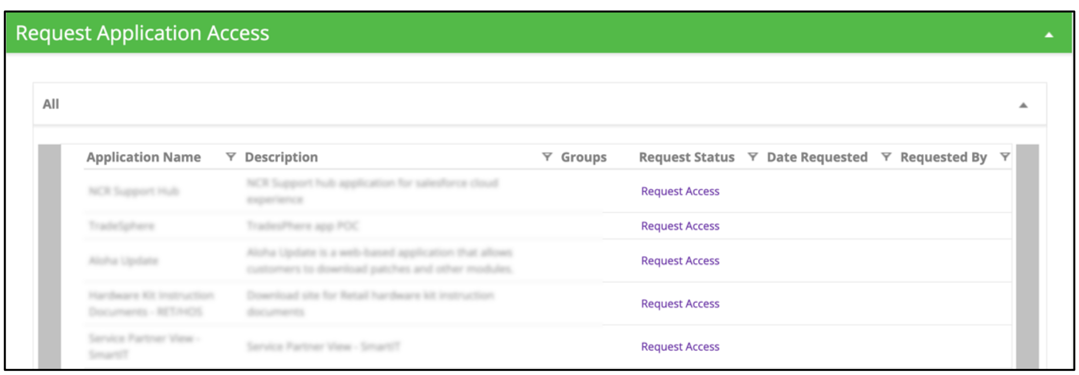
To link the user to the Enterprise level, click on the "Enterprise" section then click the red "UNLINKED" button. It will change to a green "LINKED" button for each Entity selected. This will give the user access to all NCR VOYIX Master Customer Numbers which are associated with that Entity.



<table>
<tr><td>6</td><td>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 charge 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 user can turn permissions back to "yes" within their own profile.*</td></tr>
<tr><td>7</td><td>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.


</td></tr>
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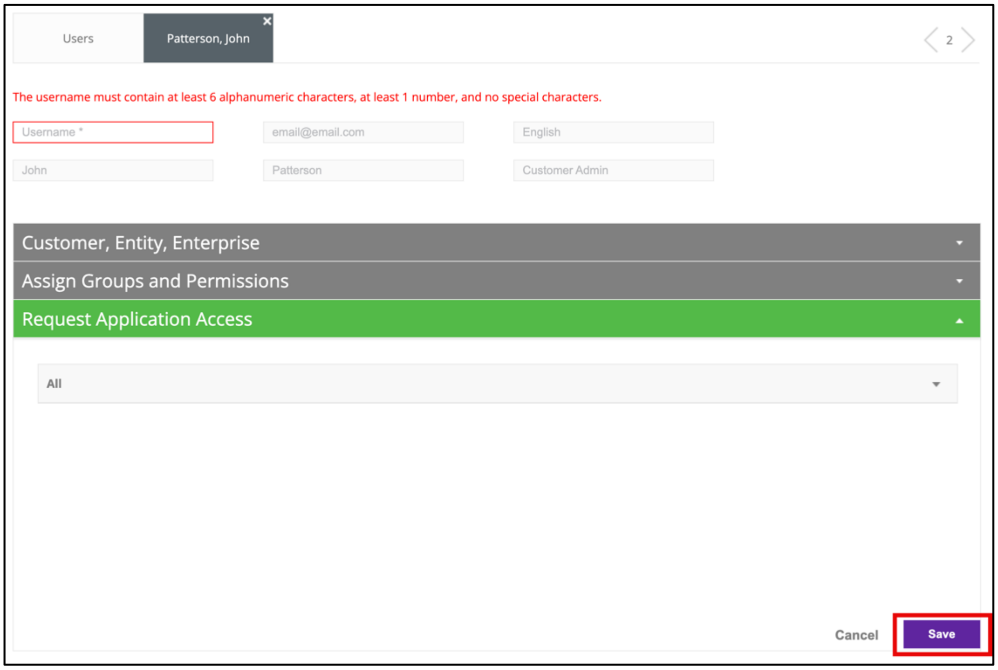
<tr>
<td>8</td>
<td>After you have completed all the information for the new user, click the Save button.



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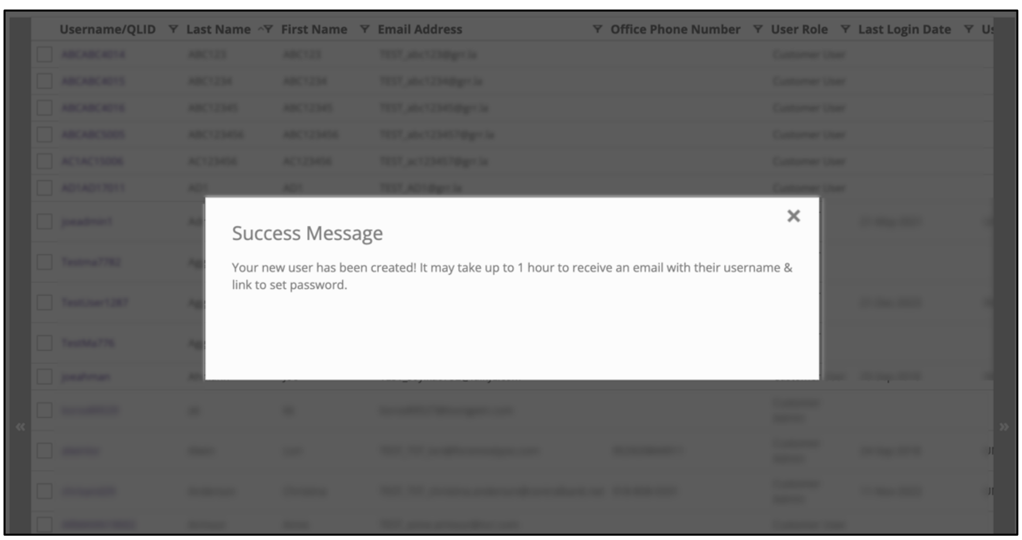
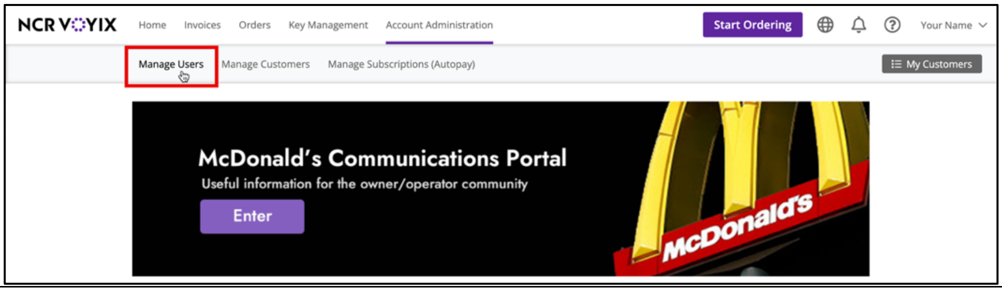
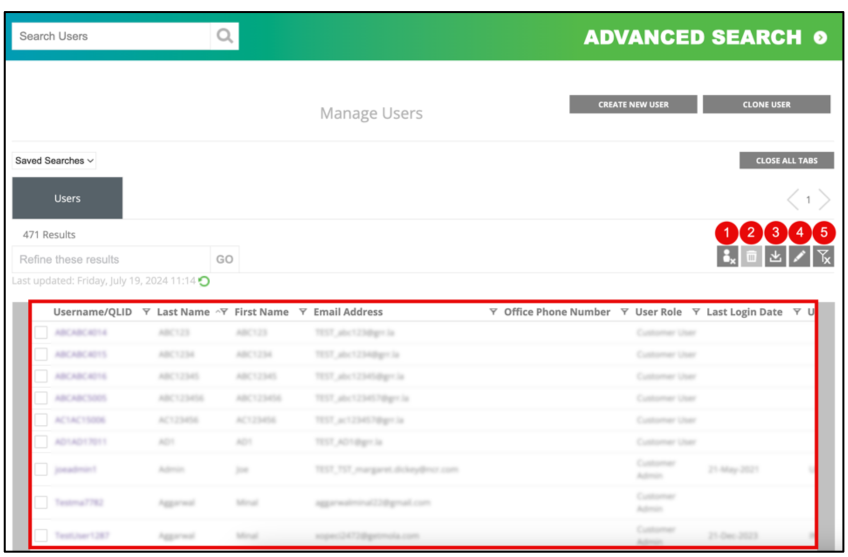
<tr>
<td>9</td>
<td>Once you have completed these steps, a success message will pop up notifying you that the new user has been created. The user will then receive an email with their login credentials, which includes their username and a temporary password.



NOTE: The temporary password is valid for 7 days. You can always send a new temporary password withing the user's profile page.</td>
</tr>
</table>

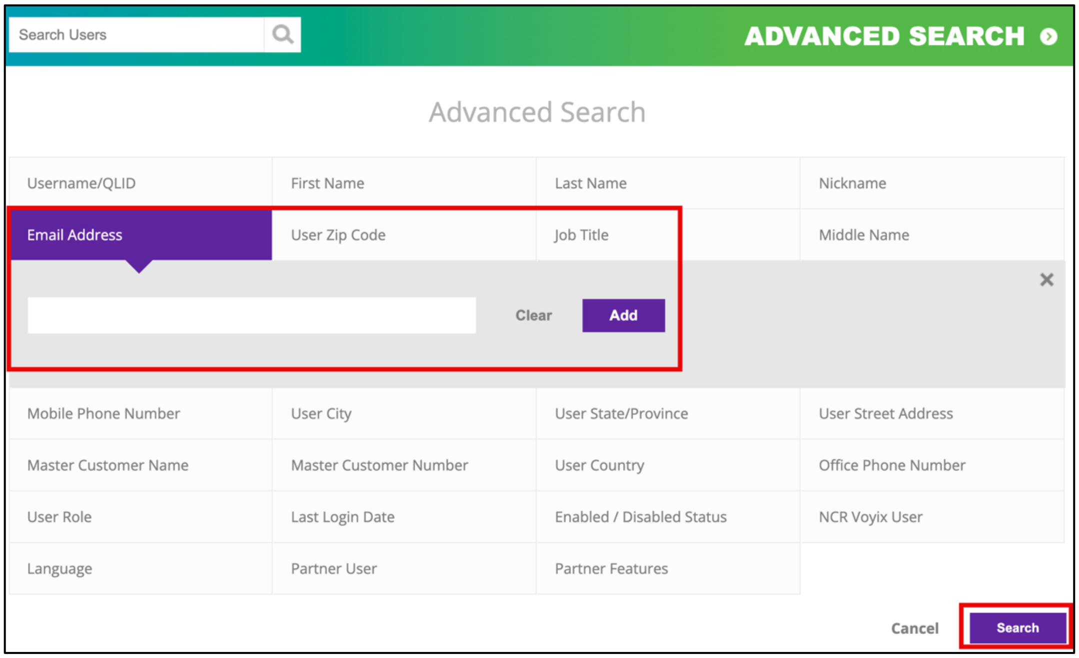
Managing users

Step	Action
1	From the Customer Portal homepage, access the Manage Users page by clicking on the “Manage Users” button under “Account Administration” in the navigation menu. 
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 

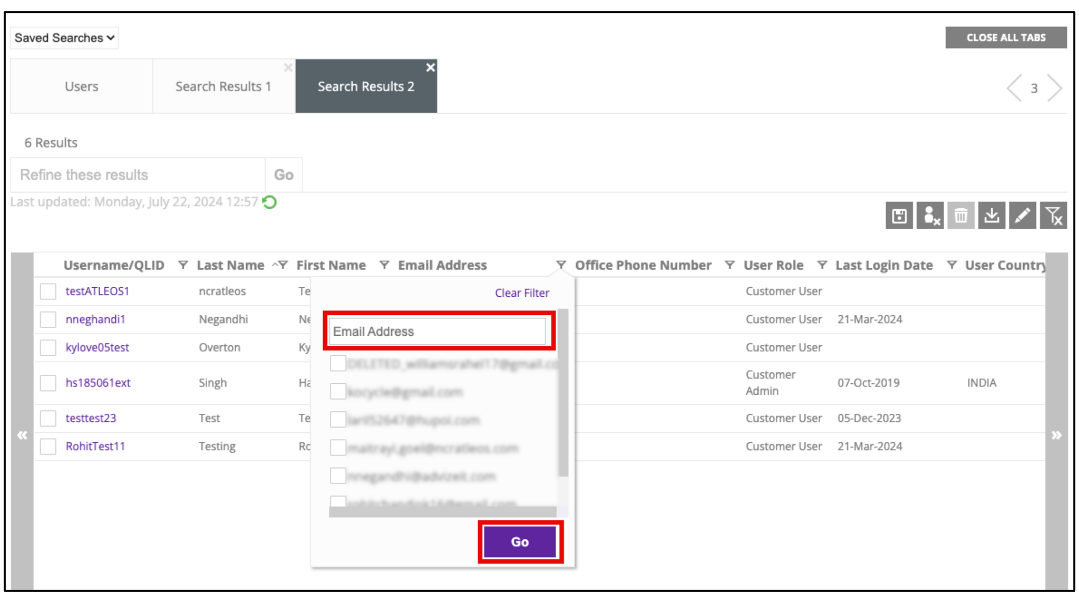
3

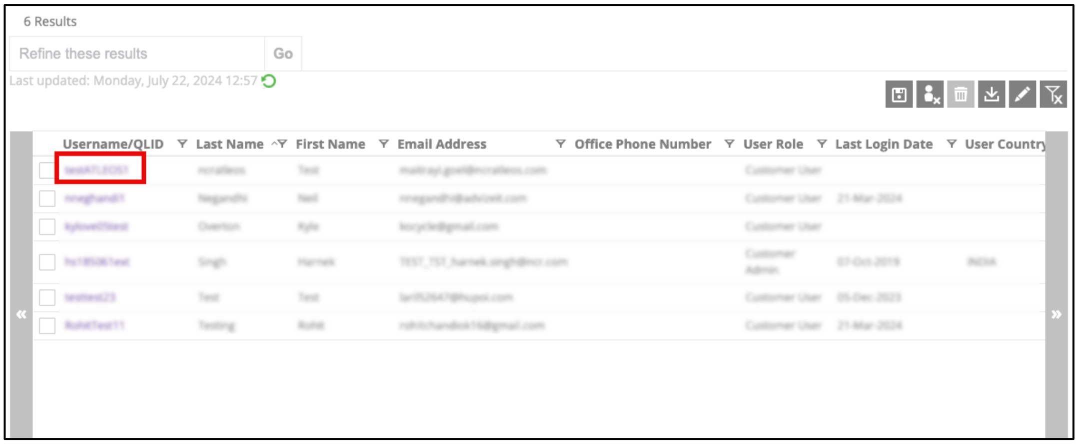
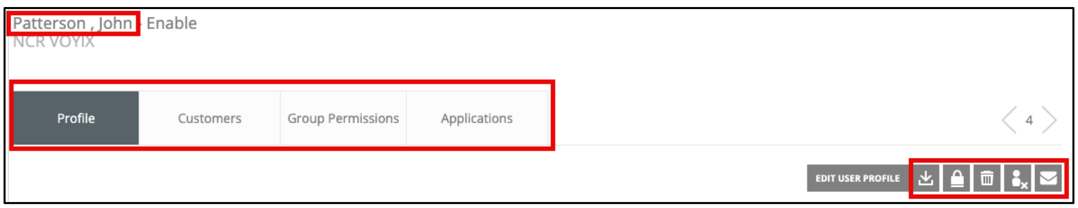
There are two ways that you can search for users:

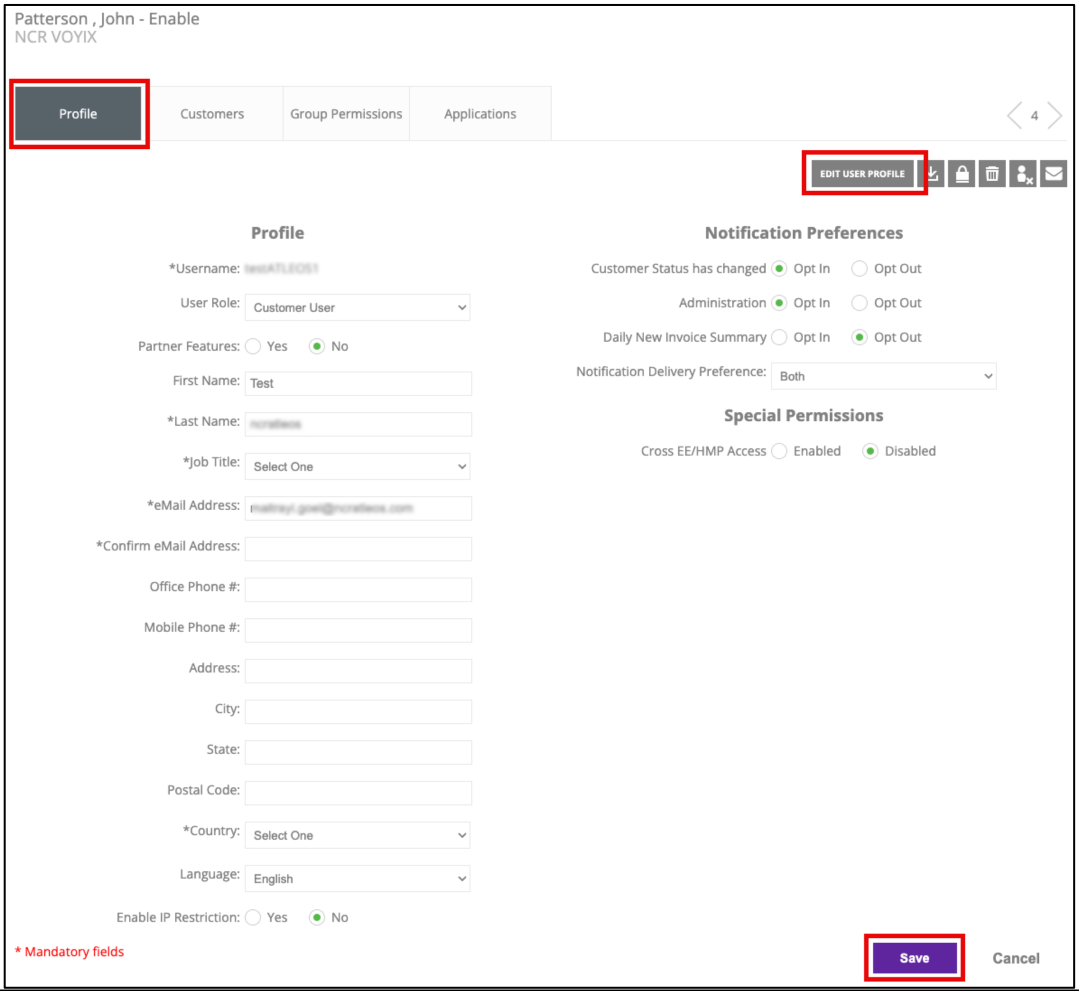
Option 1: Click on Advanced Search button, enter a search term, click Submit.



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

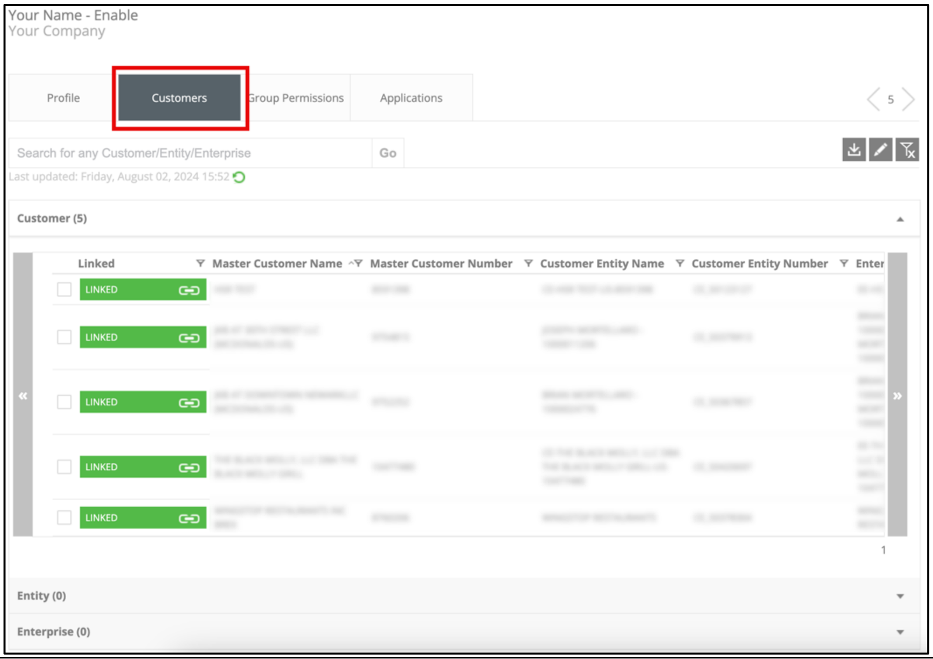


4	Once you have found the user, click on the green username to open the user's profile page. 
5	In the user's profile page, you will see their name in the top left, and buttons to either reset password, delete or disable the user. You will also see tabs for the following manageable sections: Profile, Customers, Group Permissions and Applications. 
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. NOTE: You can also change the User Role for a user.

<table>
<tr>
<td></td>
<td>


</td>
</tr>
<tr>
<td>7</td>
<td>
Customers tab

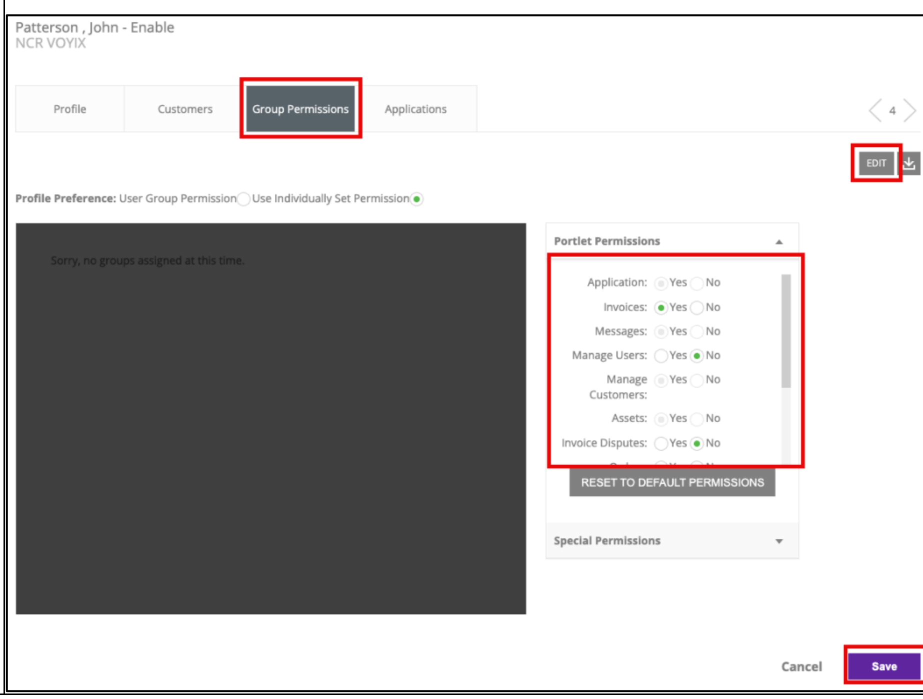
Edit a user’s access to NCR VOYIX Master Customer numbers by clicking on the red UNLINKED buttons to change them to green LINKED buttons for each NCR VOYIX Master Customer number to which the user need access, or vice versa.
</td>
</tr>
</table>



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.

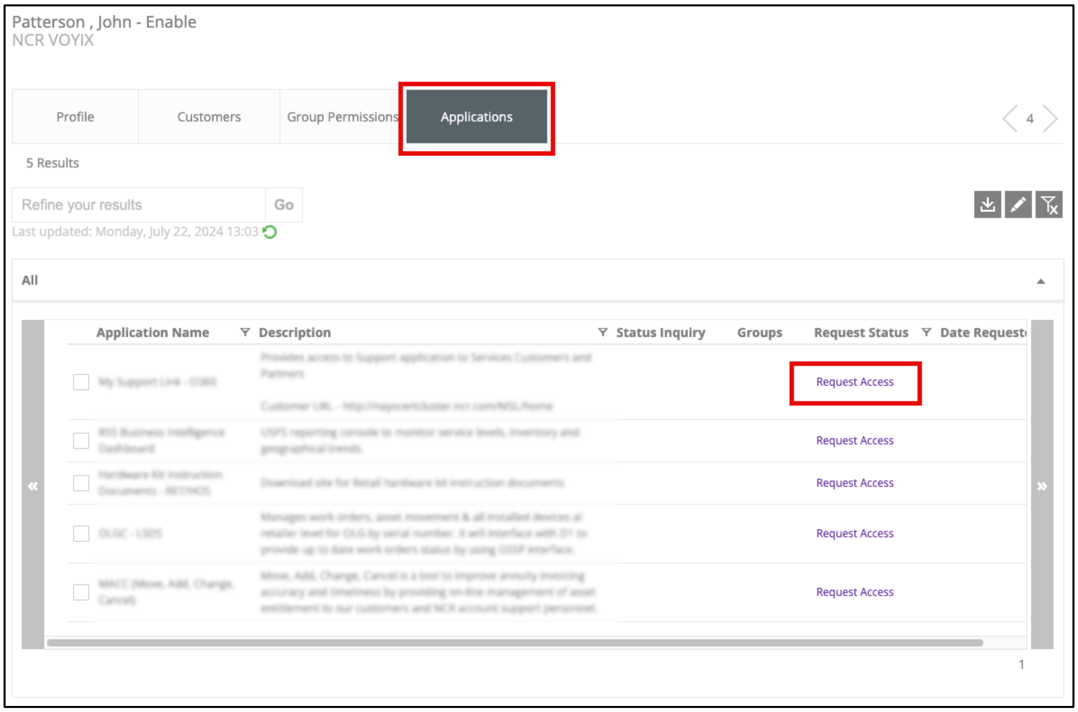


<table>
<tr>
<td>9</td>
<td>

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.



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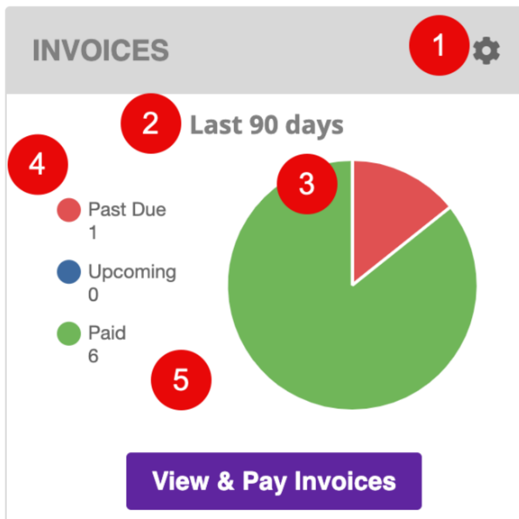
</tr>
</table>

Applications and Portlets

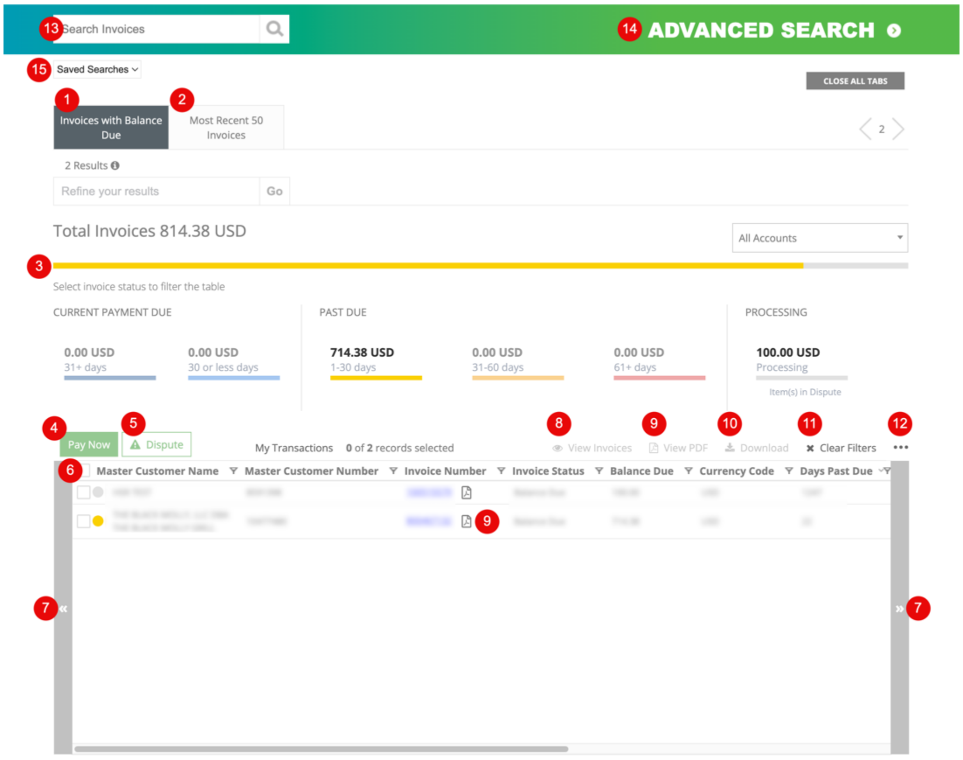
Invoices

Invoice Portlet



Number	Description
1	Settings: Changes pie chart settings
2	Date rage: 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

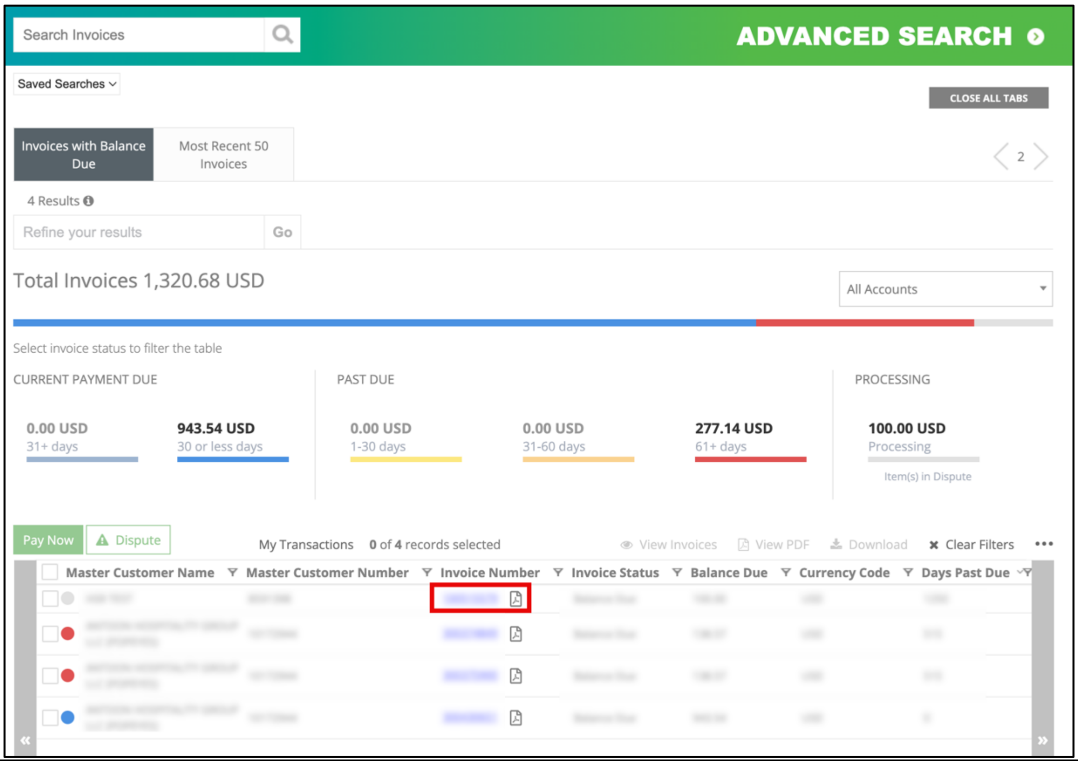


Number	Description
1	Invoices with Balance Due tab: Default report for invoices that have a balance due
2	Most Recent 50 Invoices tab: Default report for 50 most recent invoices
3	Dashboard of open invoice balances broken into upcoming, past due, and payment in process categories.
4	Pay Now button: Select 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.

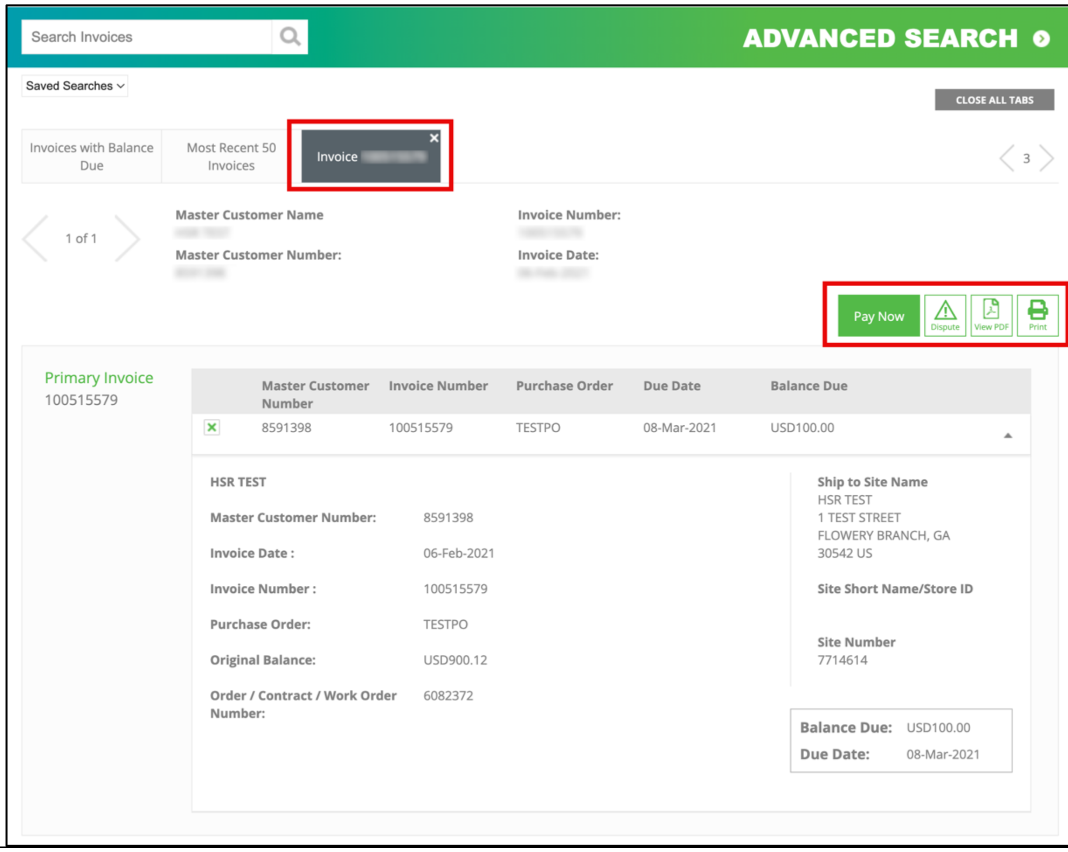
7	Lateral scrolling bars: Allows you to scroll to the left or right by clicking on the bar
8	View Invoice button: View multiple invoices at once by using the checkboxes then clicking this button
9	View PDF button: View one or multiple invoice PDFs by using the checkboxes and clicking this button
10	Download 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 - 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	To view a specific invoice, click on the desired invoice number, located under the “Invoice Number” column.



<table>
<tr>
<td>2</td>
<td>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”.



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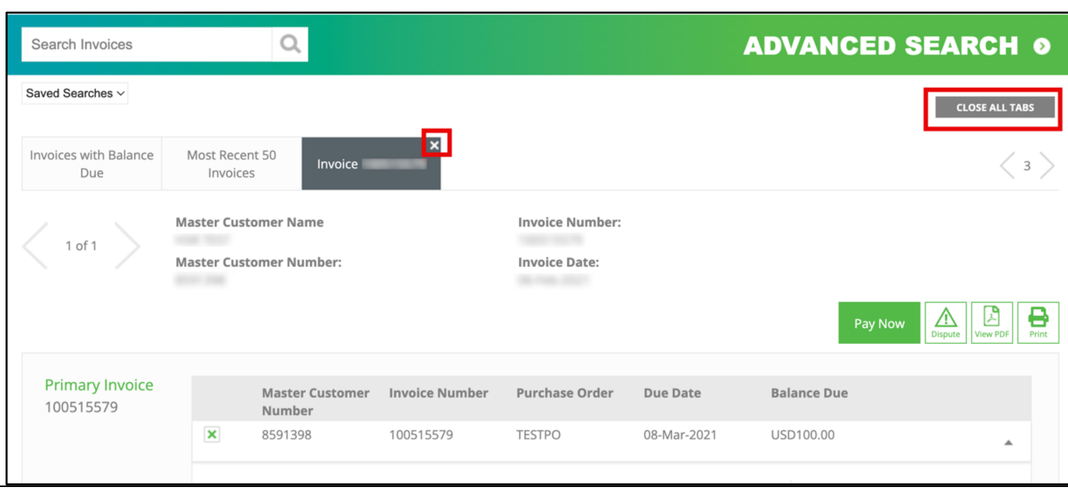
<tr>
<td>3</td>
<td>Once you are done using the invoice preview page, click on the “x” in the tab or use the Close All Tabs button.



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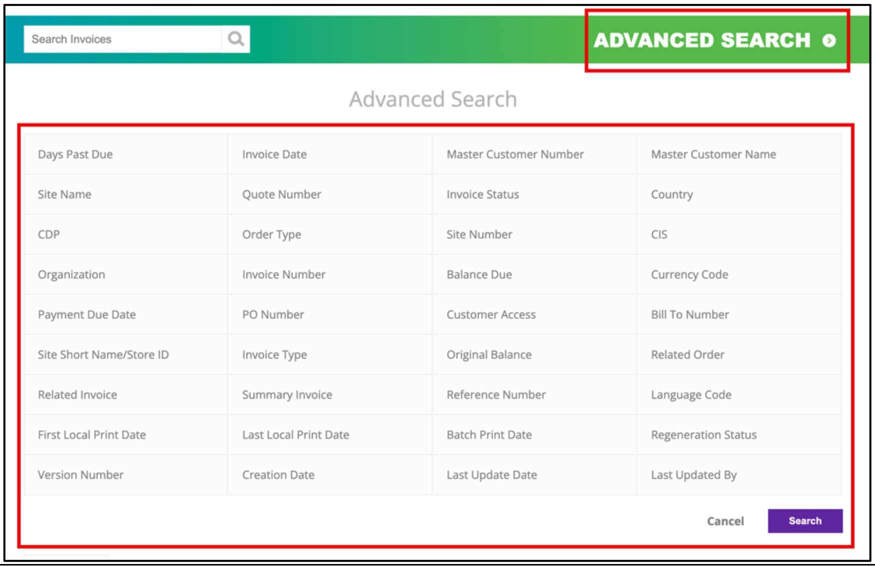
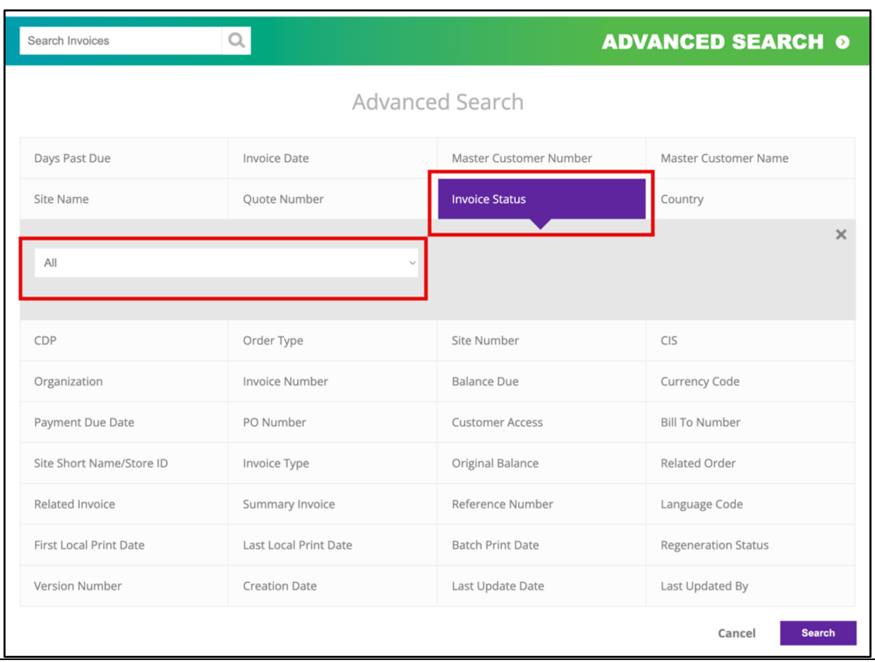
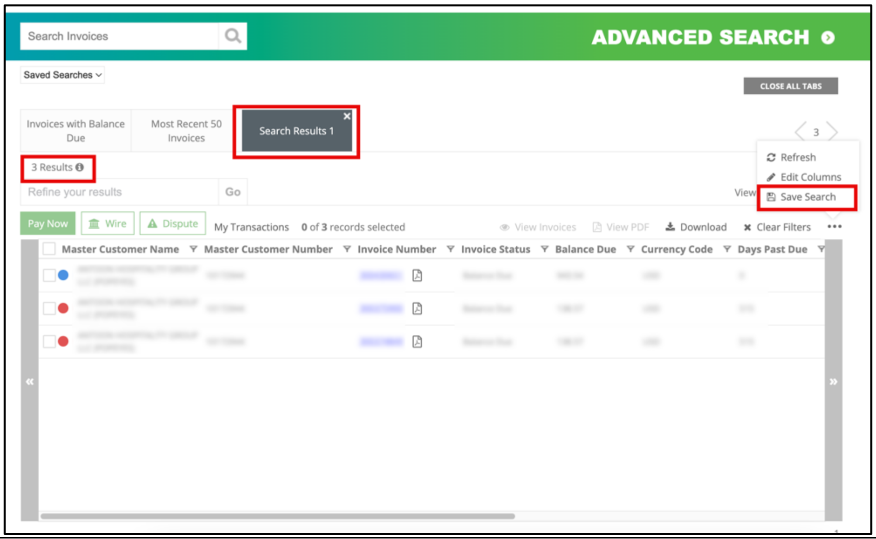
</tr>
</table>

Using Advanced Search

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

<table>
<tr>
<td>3</td>
<td>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.


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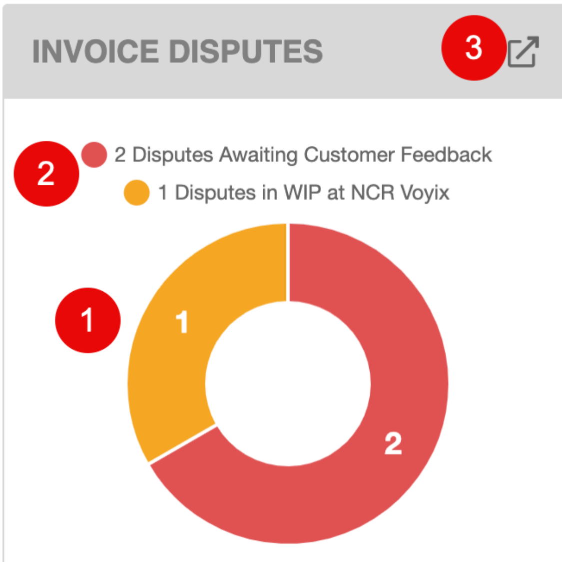
</table>

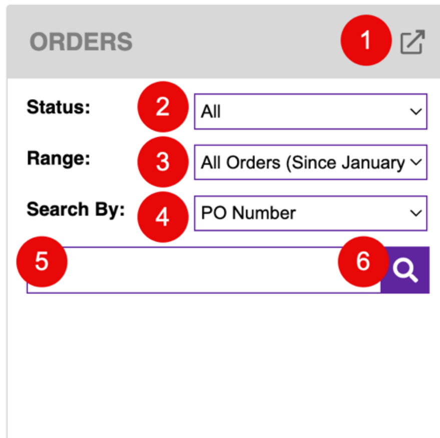
Invoice Disputes Portlet



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

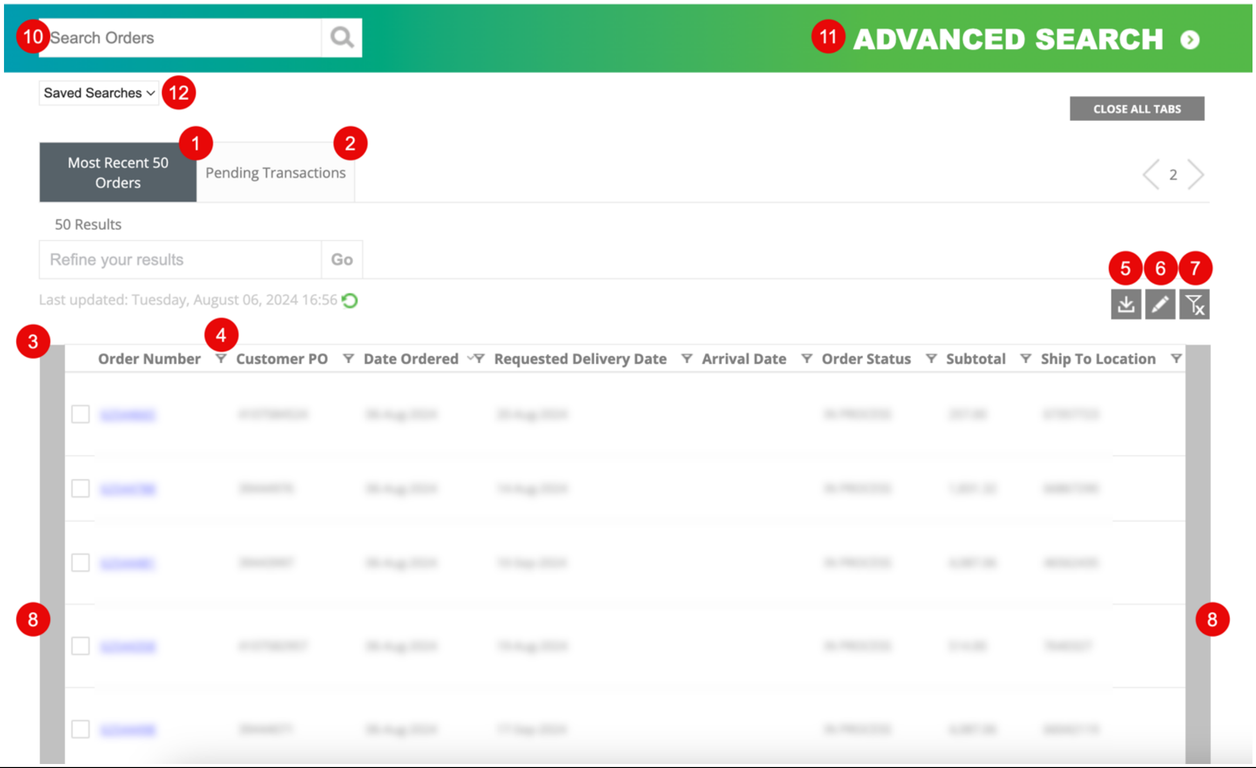
Orders

Orders Portlet



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

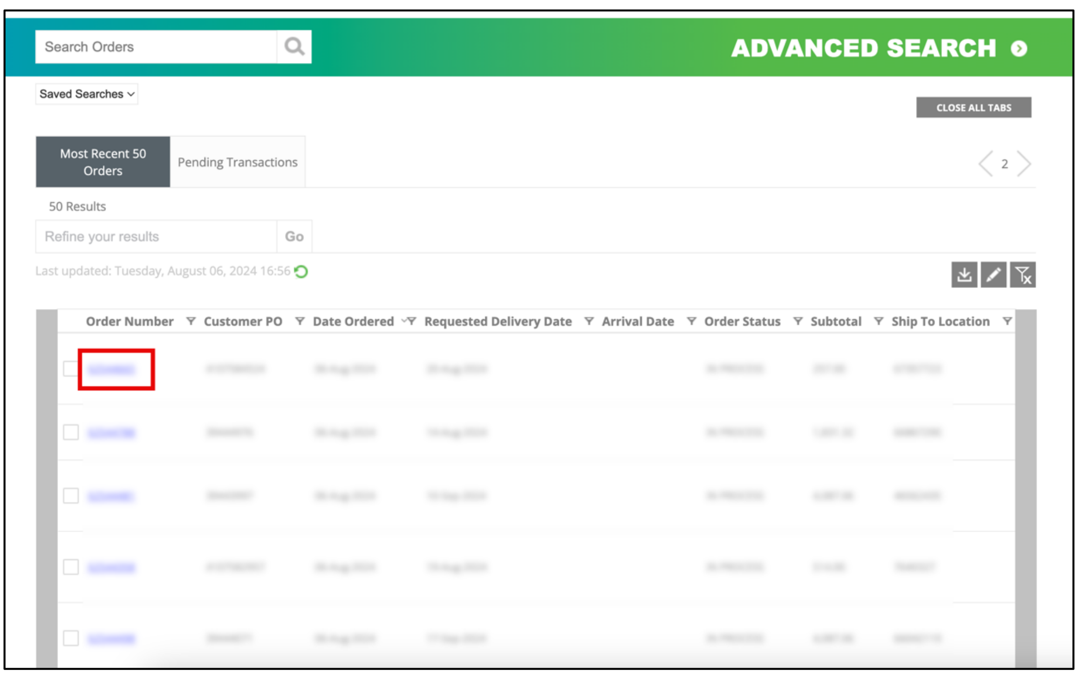


Number	Description
1	Most Recent 50 Orders tab: Default report for 50 most recent orders
2	Pending Transactions tab: Tab for a report of online orders that have not yet fully processed
3	Report/Data table: Report of highlighted tab
4	Filter button: Columns can be filtered by selecting the filter button 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

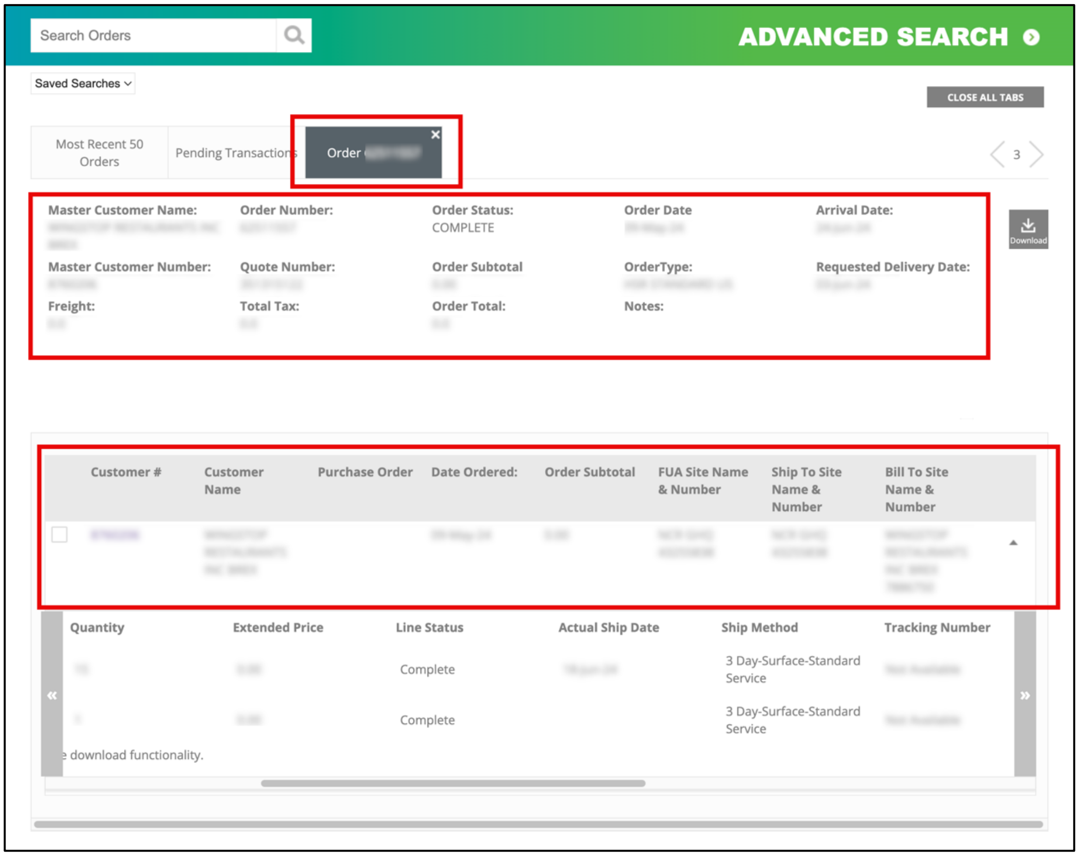
7	Clear Filters button: Clears the filters which you have set on all columns
8	Lateral scrolling bars: Allows you to scroll to the left or right by clicking and dragging the bar
9	Basic Search: Search for an order across all search fields
10	Advanced Search: Displays a drop-down list of fields create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

Viewing Order Details & Shipment Tracking

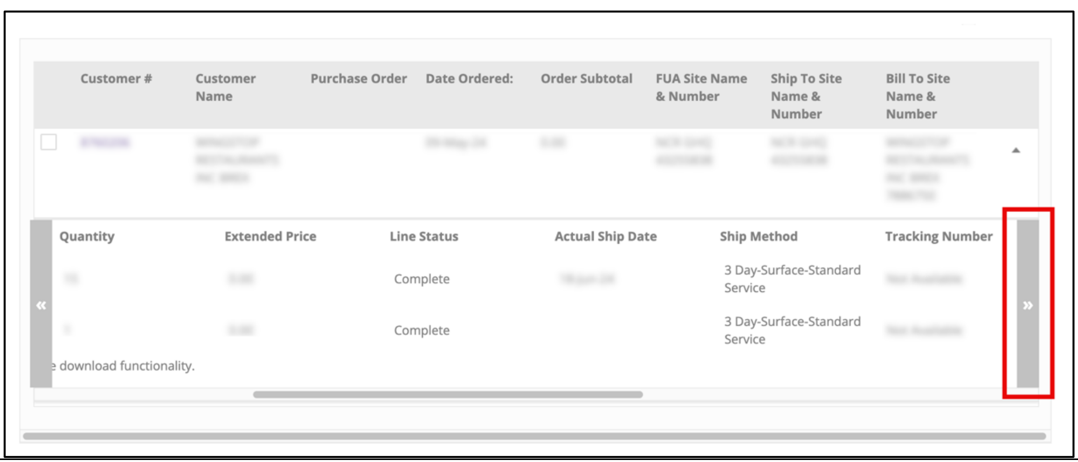
Number	Description
1	To view the Order Details page for a specific order, click on the desired Order Number located under the "Order Number" column.



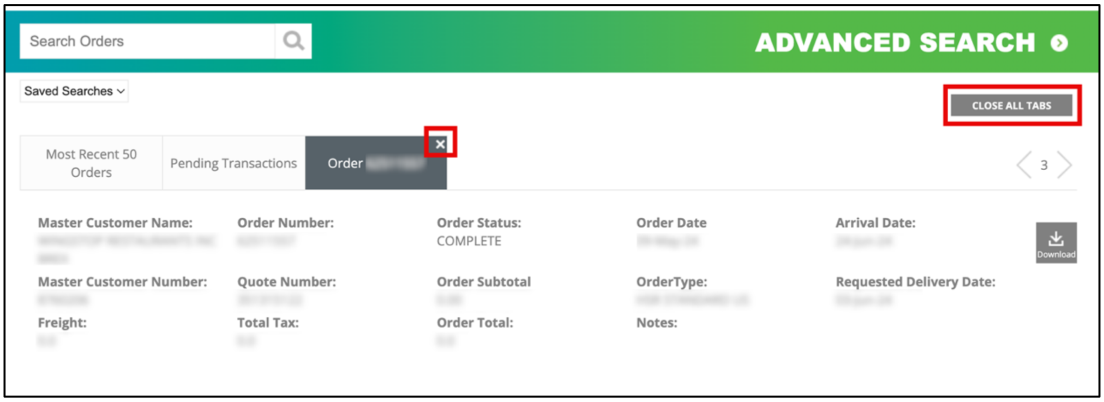
<table>
<tr>
<td>2</td>
<td>The Order Details page will open in a new tab in the Customer Portal and display order detail information.



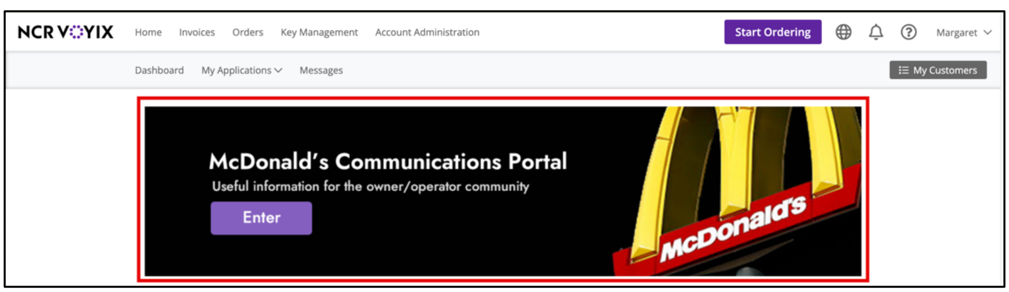
</td>
</tr>
<tr>
<td>3</td>
<td>Use the lateral scrolling bar to view details, including shipment details, at a line level for each product ordered.



</td>
</tr>
</table>

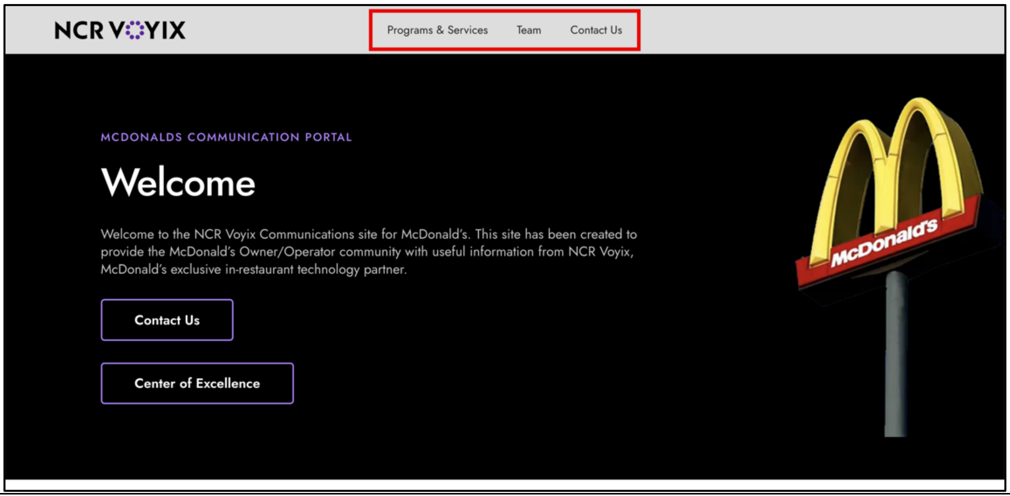
4	Once you are done using the Order Details page, click on the "x" in the tab or use the "CLOSE ALL TABS" button. 

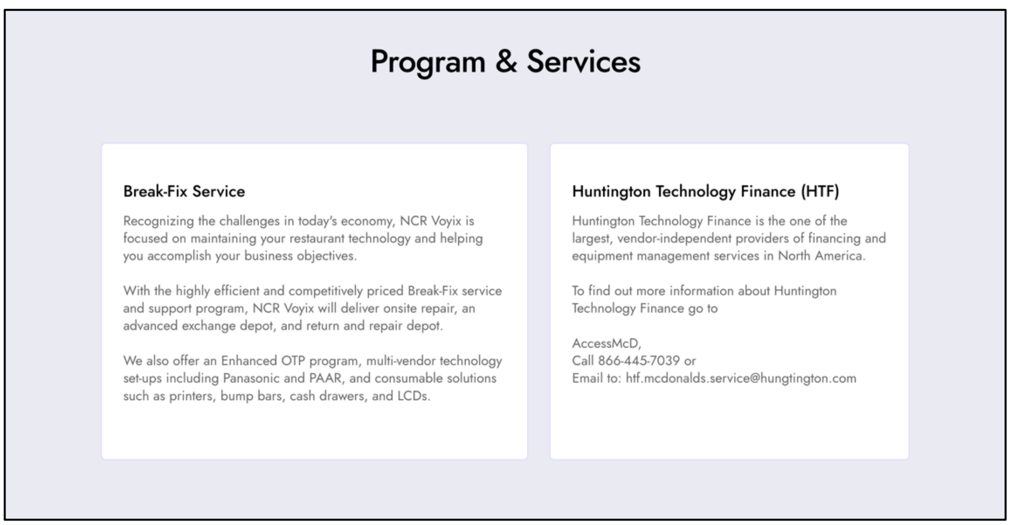
McDonald's Communications Portal

Step	Action
1	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. 

<table>
<tr>
<td>2</td>
<td>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



</td>
</tr>
<tr>
<td>3</td>
<td>Programs and Services provides details on NCR VOYIX Programs & Services available to the McDonald’s owner-operator committee.


</td>
</tr>
</table>

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