JOB AID

Navigating the Supplier Portal

Last updated on: 06/30/2022

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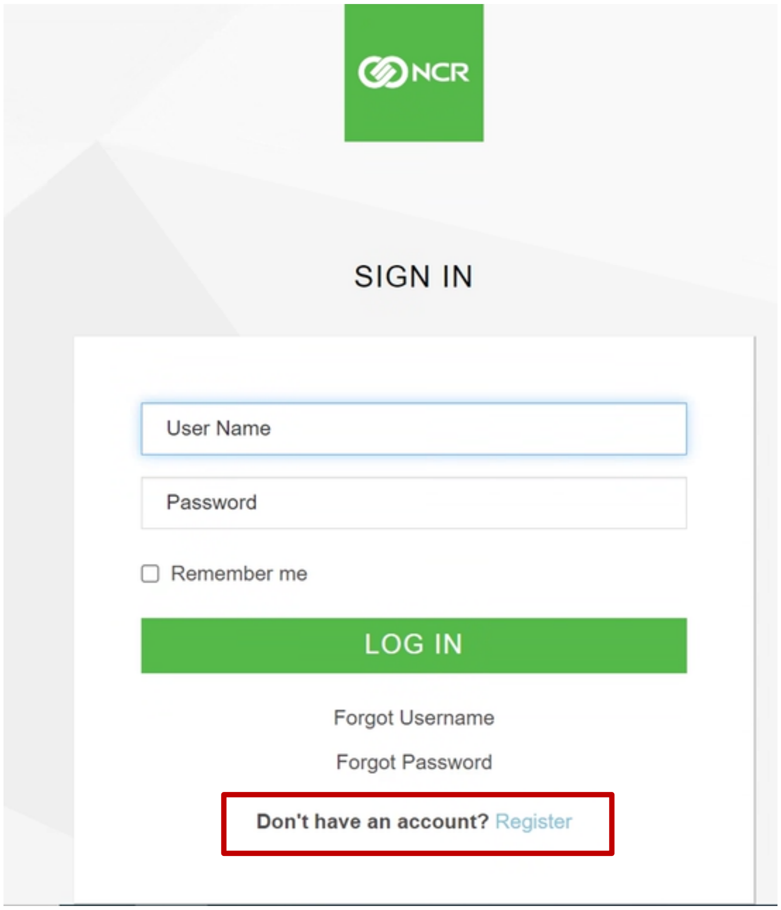
1. Roles & Descriptions

The Vendor contact who completes the registration to MyNCR will be initially assigned administrative level access to the system. This primary point of contact will manage the Supplier Portal account with NCR.

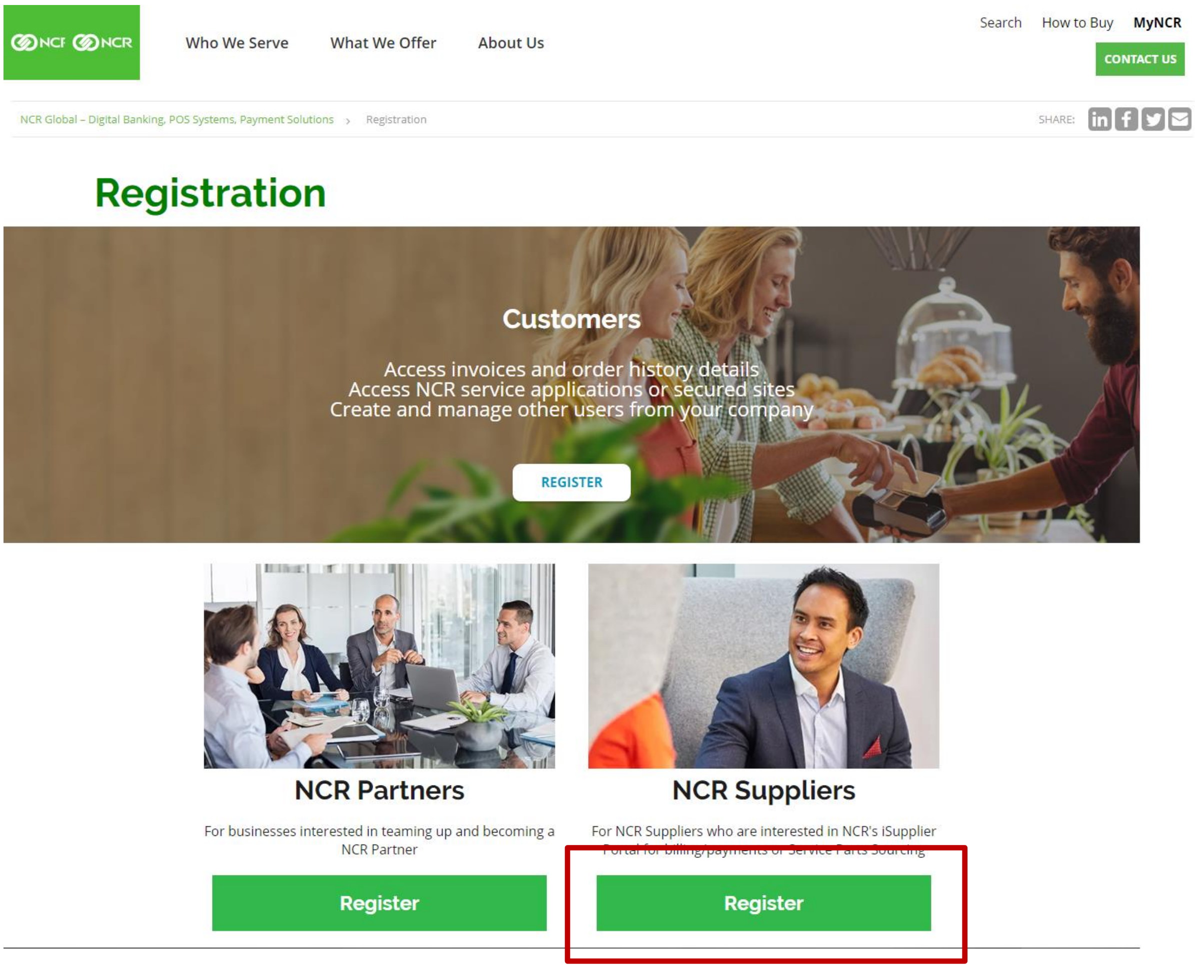
Supplier Portal Roles	
Role	**Description**
Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
Supplier Self Service Bank Account Maintenance	Manages bank account setup and maintenance for the supplier company. Primary tasks include adding new bank accounts, updating bank account details, and updating bank account payment methods.
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
Supplier Self Service Account Manager	Individual has view only access to the information available on the Supplier Portal.

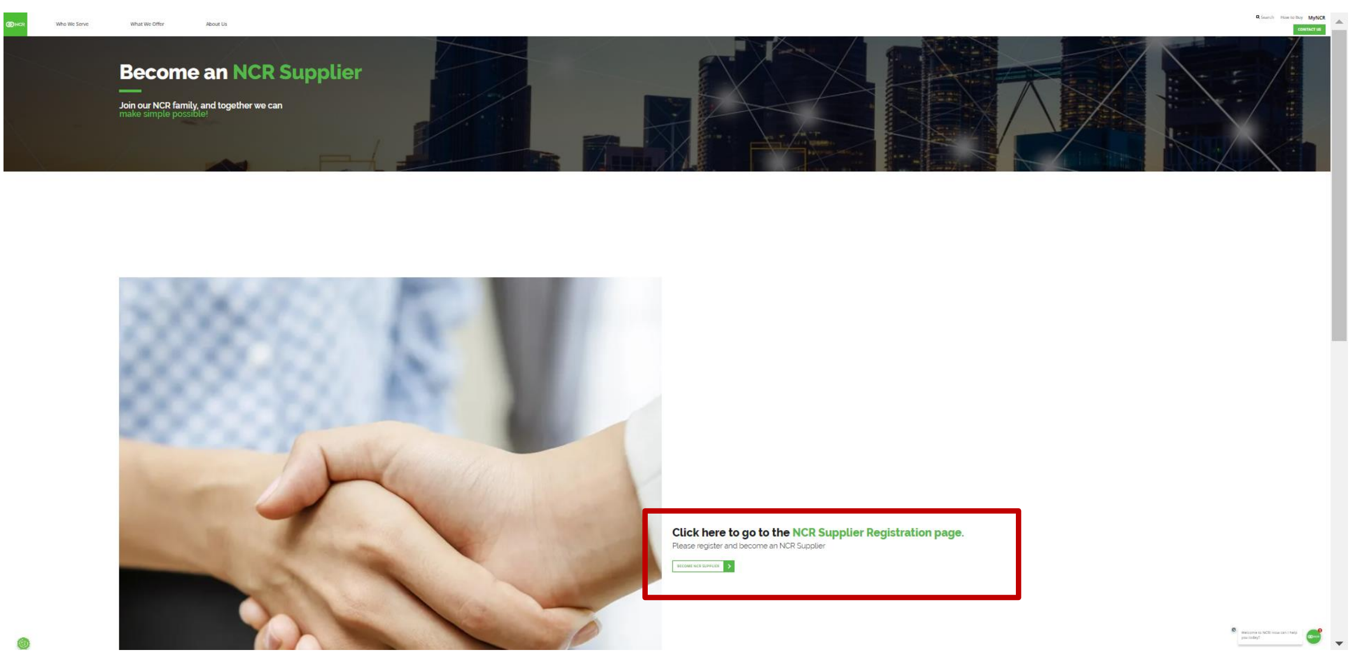
2. Access to the NCR Supplier Portal

Process Step	Description
1	**Access to the Supplier Portal** Users should access the Supplier Portal through the following web address - https://myncr.ncr.com Existing supplier users can login with their current username and password credentials. New suppliers will need to go through the registration process by clicking through the prompts on the site.

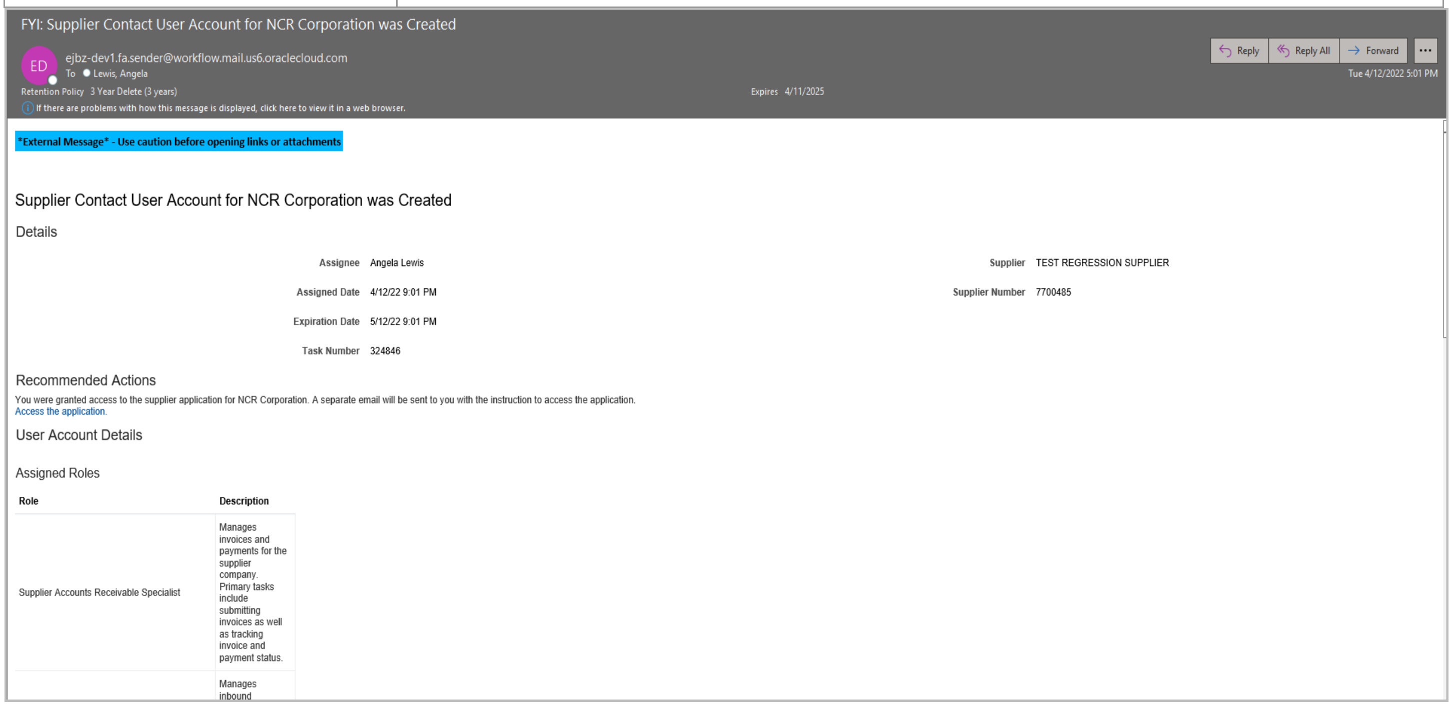


Portal Screen Shots





Process Step	Description
1.1	**Access to the Supplier Portal** Once registration to the supplier portal is completed on MyNCR, between one to two emails will be sent. ▪ The **first email** acknowledges receipt of the supplier registration application. Note: The registration expires in 30 days



FYI: Supplier Contact User Account for NCR Corporation was Created

ED ejbz-dev1.fa.sender@workflow.mail.us6.oraclecloud.com
To Lewis, Angela

Reply | Reply All | Forward

Tue 4/12/2022 5:01 PM

Retention Policy 3 Year Delete (3 years) Expires 4/11/2025

If there are problems with how this message is displayed, click here to view it in a web browser.

External Message - Use caution before opening links or attachments

Supplier Contact User Account for NCR Corporation was Created

Details

Assignee	Angela Lewis	Supplier	TEST REGRESSION SUPPLIER
Assigned Date	4/12/22 9:01 PM	Supplier Number	7700485
Expiration Date	5/12/22 9:01 PM		
Task Number	324846		

Recommended Actions

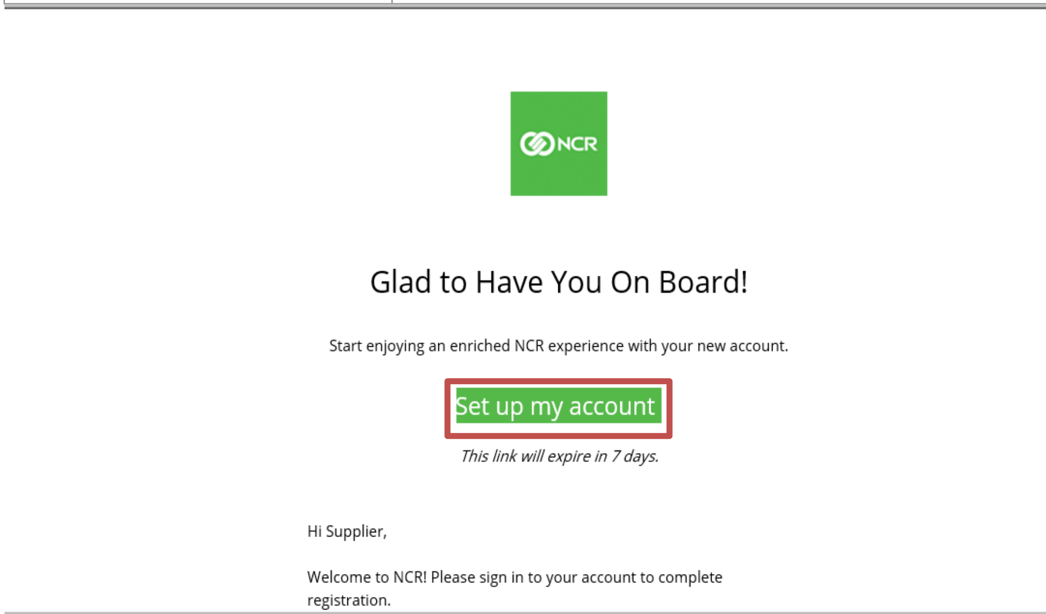
You were granted access to the supplier application for NCR Corporation. A separate email will be sent to you with the instruction to access the application.
Access the application.

User Account Details

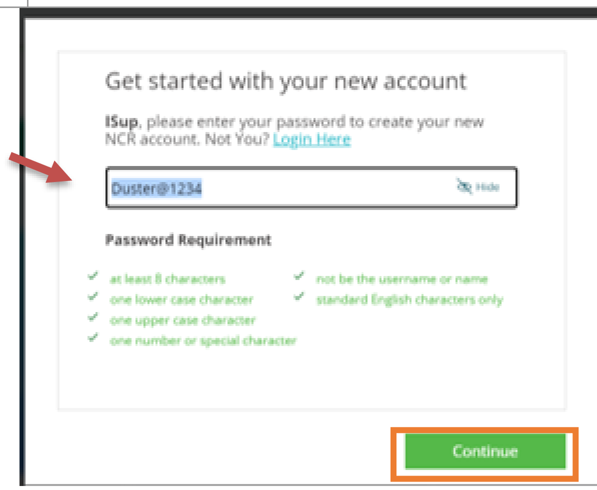
Assigned Roles

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
	Manages inbound

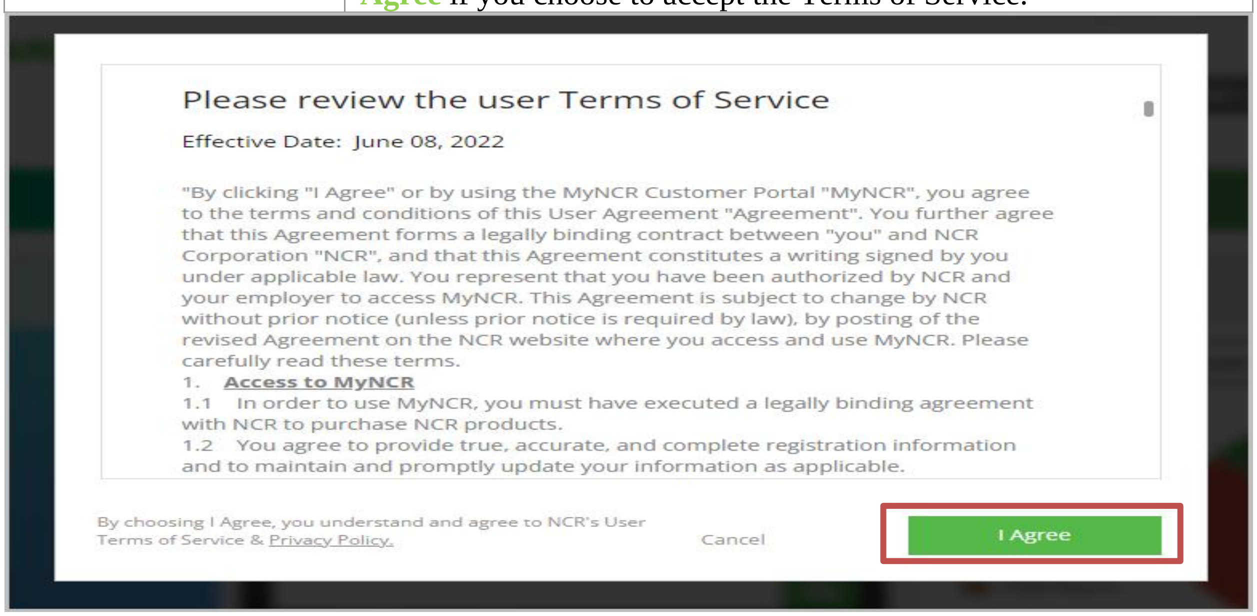
Process Step	Description
2	**Access to the Supplier Portal** The **second email** is the **Welcome to MyNCR!** access email which contains a link to log into the Supplier Portal for the first time. ▪ For new supplier users, **click** on **Set up my account**. The link expires in seven (7) days.



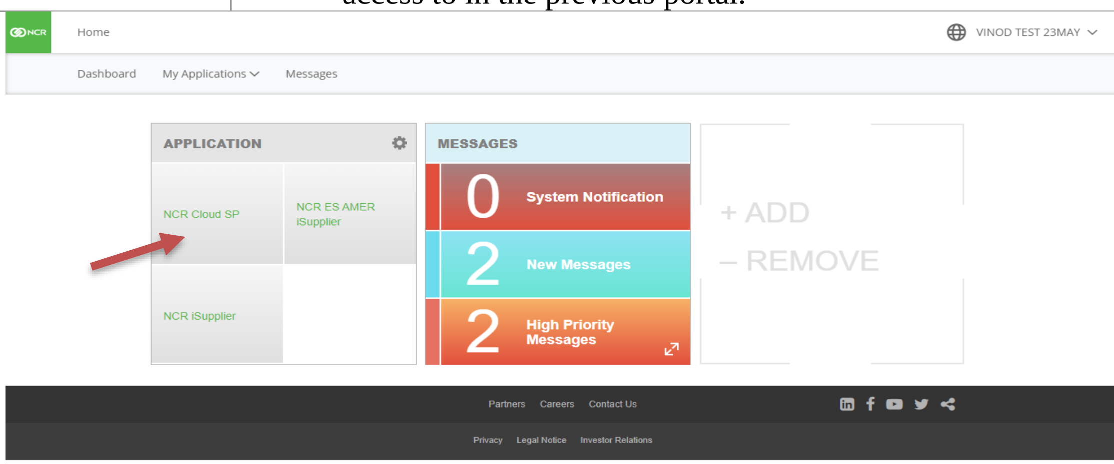
Process Step	Description
3	**Access to the Supplier Portal** Users will be prompted with the page to reset their password in accordance with the requirements. Click Continue.



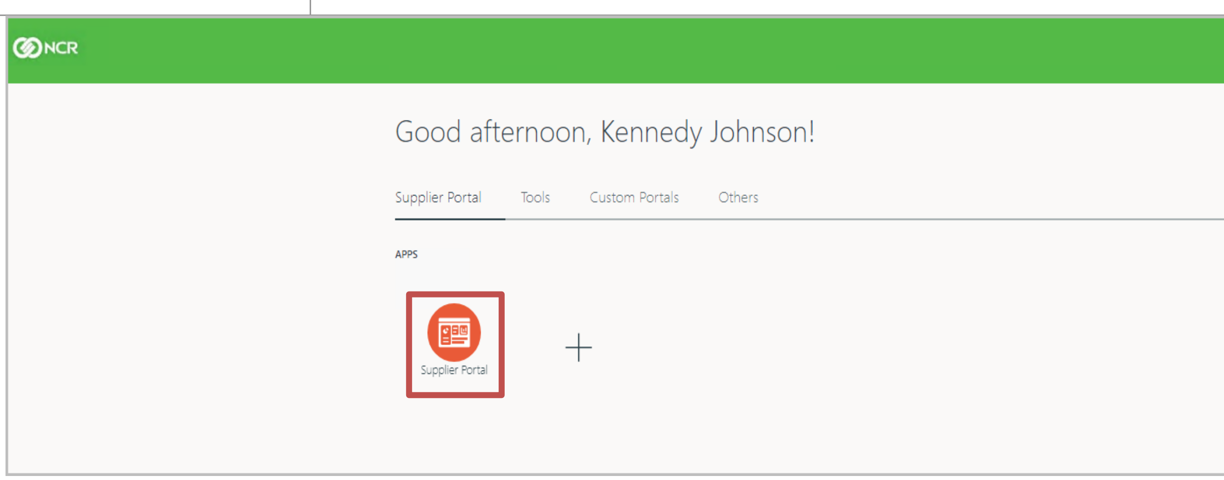
Process Step	Description
4	**Access to the Supplier Portal** The user will be prompted to review the Terms of Service. **Click I Agree** if you choose to accept the Terms of Service.



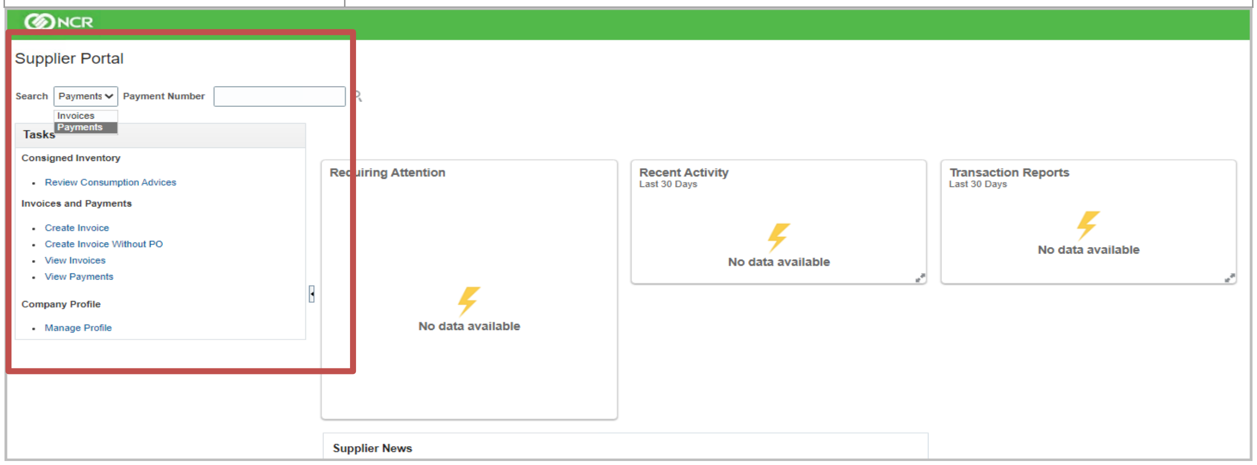
Process Step	Description
5	**Access to the Supplier Portal** User will be redirected to the MyNCR Home Page. **Select** the **NCR Cloud SP** application to access the Supplier Portal. Note – The “NCR Cloud SP” application will be available for most portal users to access Oracle Cloud. • New users will only see “NCR Cloud SP” • Existing users will view existing applications that they had access to in the previous portal.



Process Step	Description
6	**Access to the Supplier Portal** **Click** on the **Supplier Portal** icon

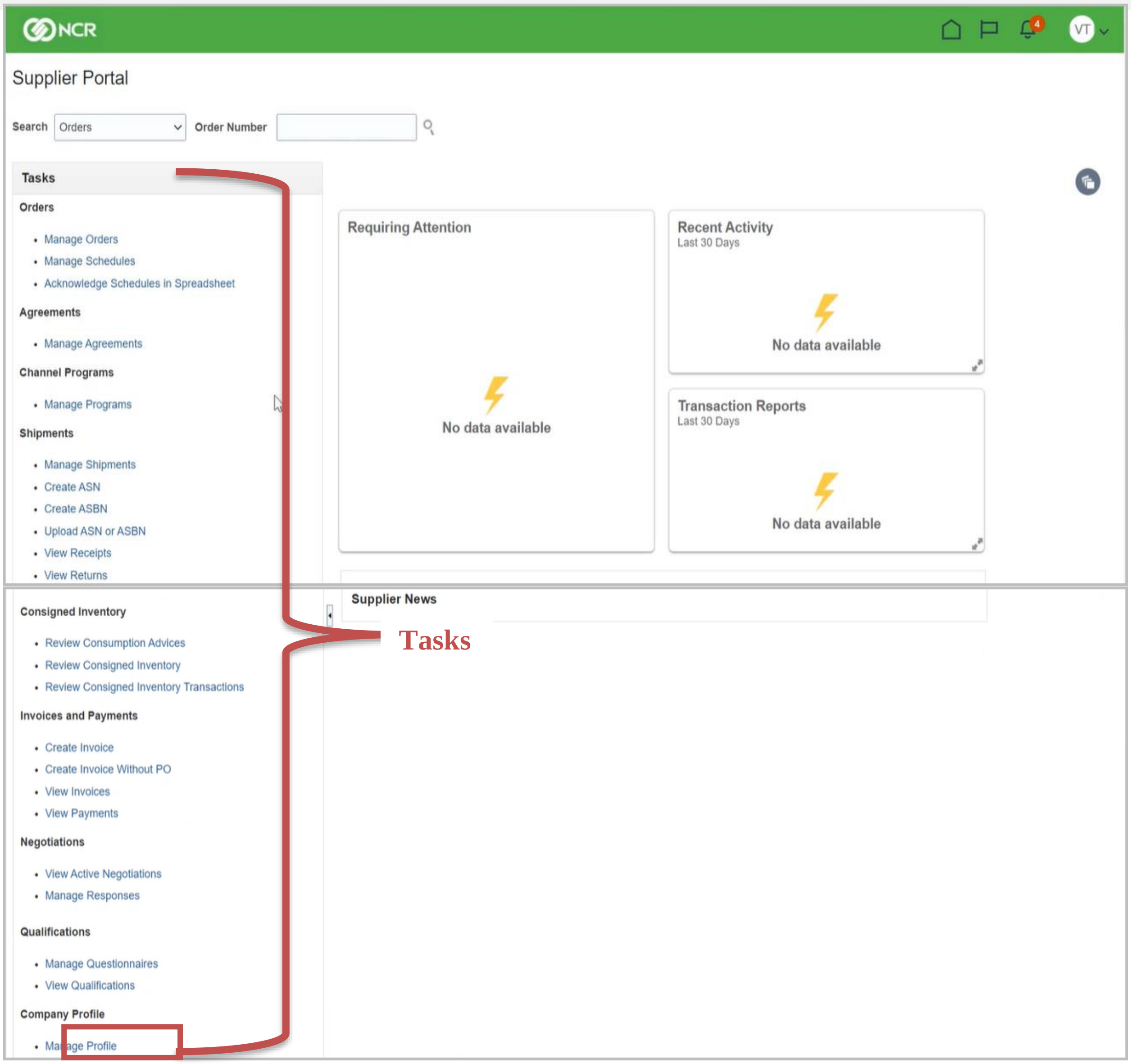


Process Step	Description
7	**Access to the Supplier Portal** This Supplier Portal role can **Search** Invoices and Payments and **perform** the Tasks listed: **Review Consumption Advices**, **Create** and **View Invoices** and **Payments**, and manage the **Company Profile**. *The options available on the screen will be based on your Supplier Portal role.*



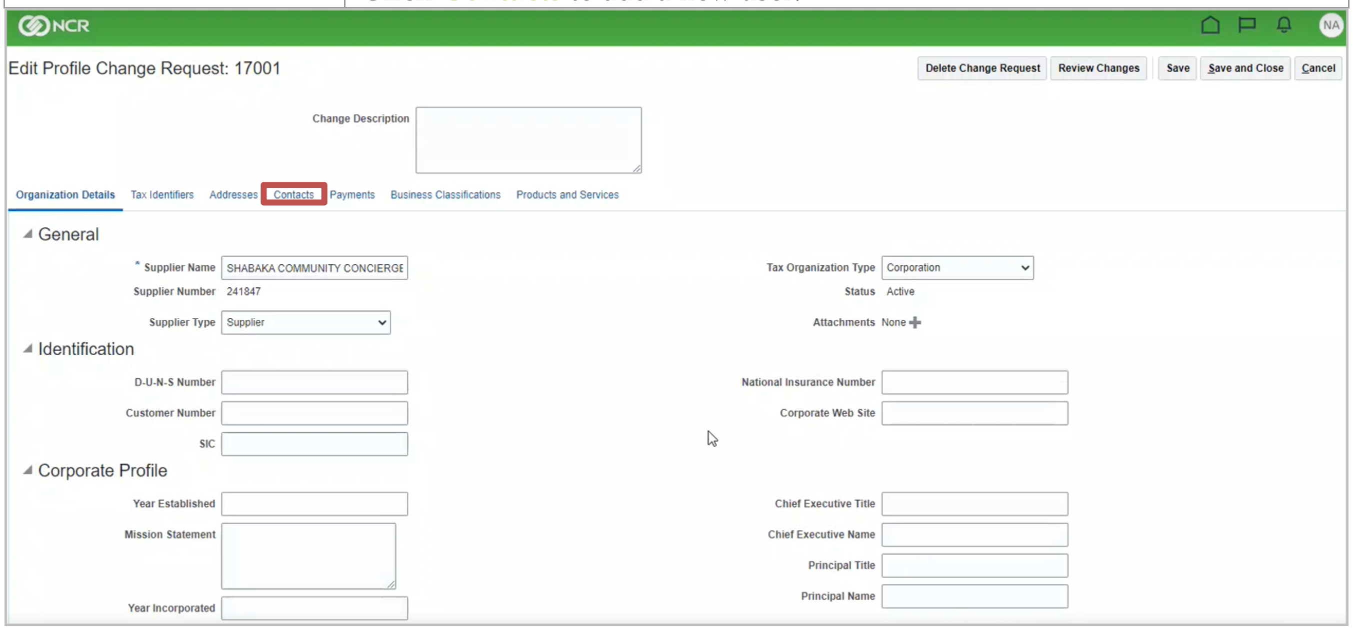
3. Managing Profiles

Process Step	Description
1	**Manage Profile** Go to **Company Profile** at the bottom of the list of **Tasks**. **Select Manage Profile** to make updates to the organization, payments and banking, tax identifiers, addresses and contacts, business classification as well as products and services sold to NCR.

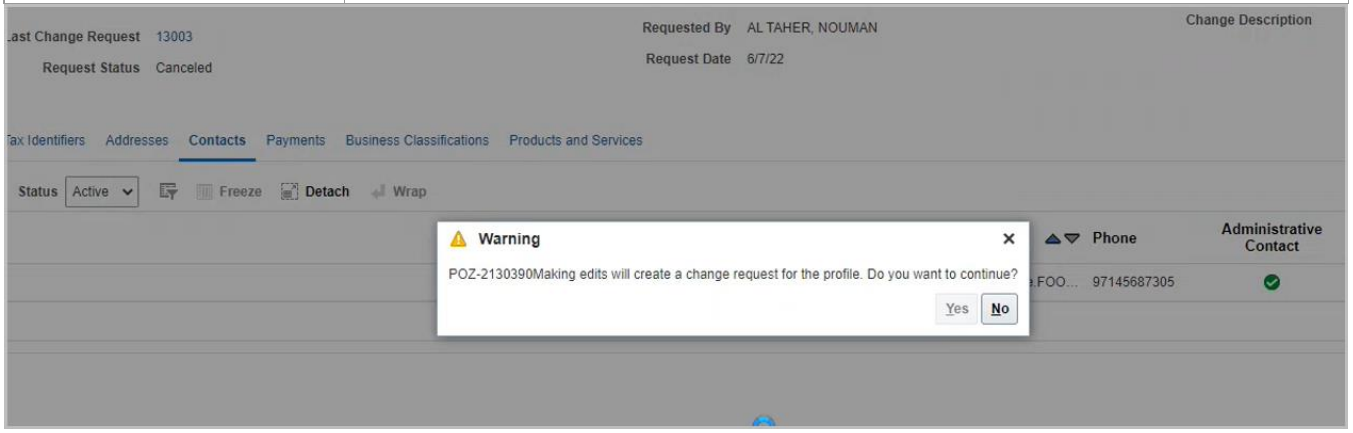

NCR
Supplier Portal
Search
Orders
Order Number
Tasks
Orders
Manage Orders
Manage Schedules
Acknowledge Schedules in Spreadsheet
Agreements
Manage Agreements
Channel Programs
Manage Programs
Shipments
Manage Shipments
Create ASN
Create ASBN
Upload ASN or ASBN
View Receipts
View Returns
Requiring Attention
No data available
Recent Activity
Last 30 Days
No data available
Transaction Reports
Last 30 Days
No data available
Consigned Inventory
Review Consumption Advices
Review Consigned Inventory
Review Consigned Inventory Transactions
Invoices and Payments
Create Invoice
Create Invoice Without PO
View Invoices
View Payments
Negotiations
View Active Negotiations
Manage Responses
Qualifications
Manage Questionnaires
View Qualifications
Company Profile
Manage Profile
Supplier News
Tasks

3.1 Adding a New User

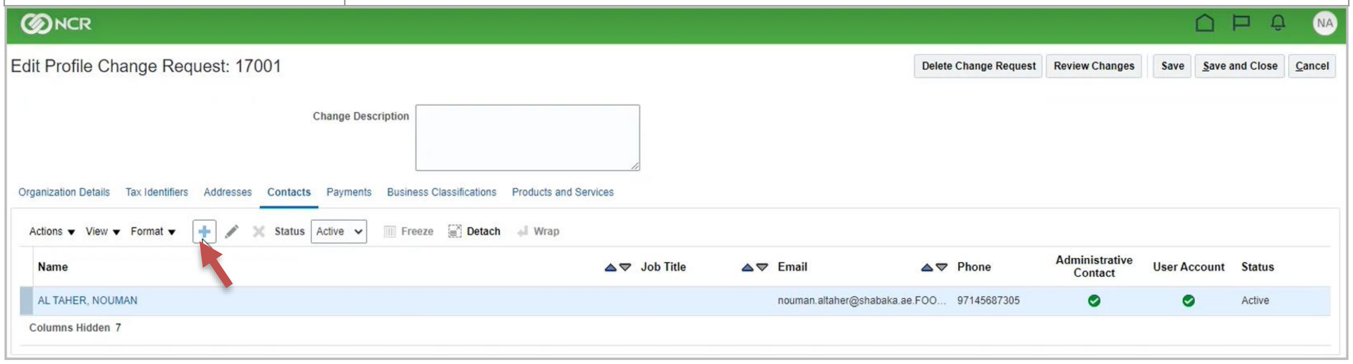
Process Step	Description
2	**Adding a New User** The Company Profile screen tool bar list the options available to a user. **Click** Contacts to add a new user.



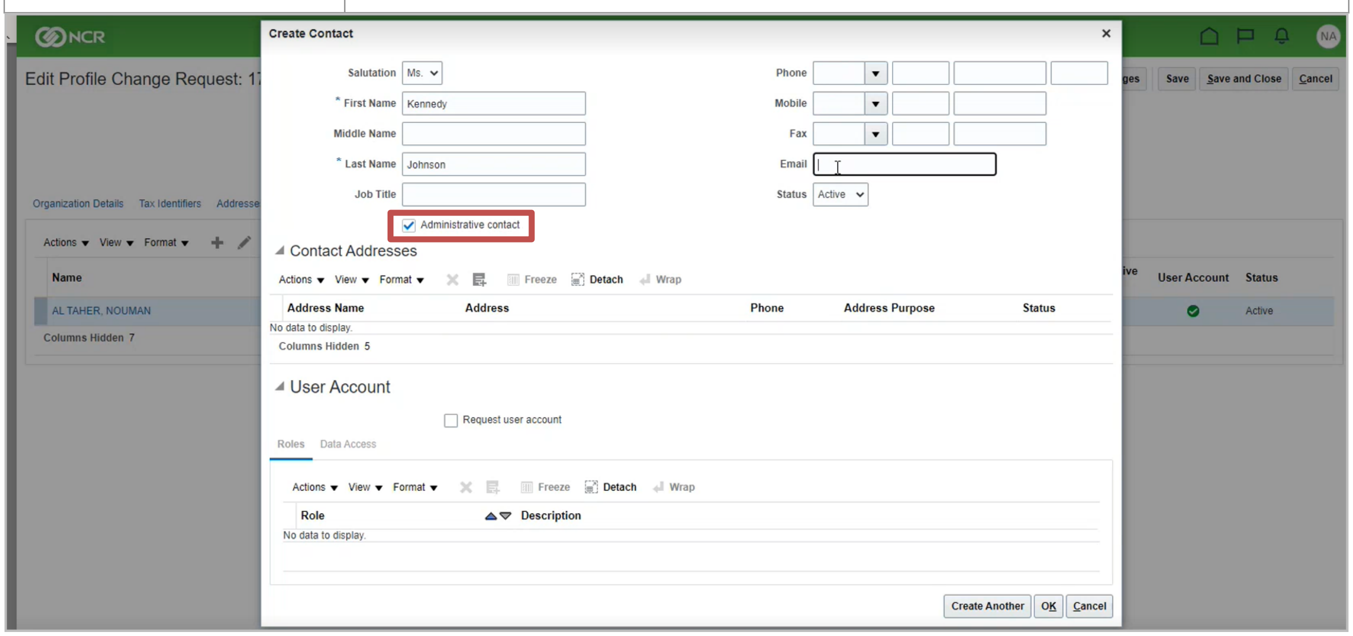
Process Step	Description
2.1	**Adding a New User** The following profile change warning message may appear**. Click** Yes to continue.



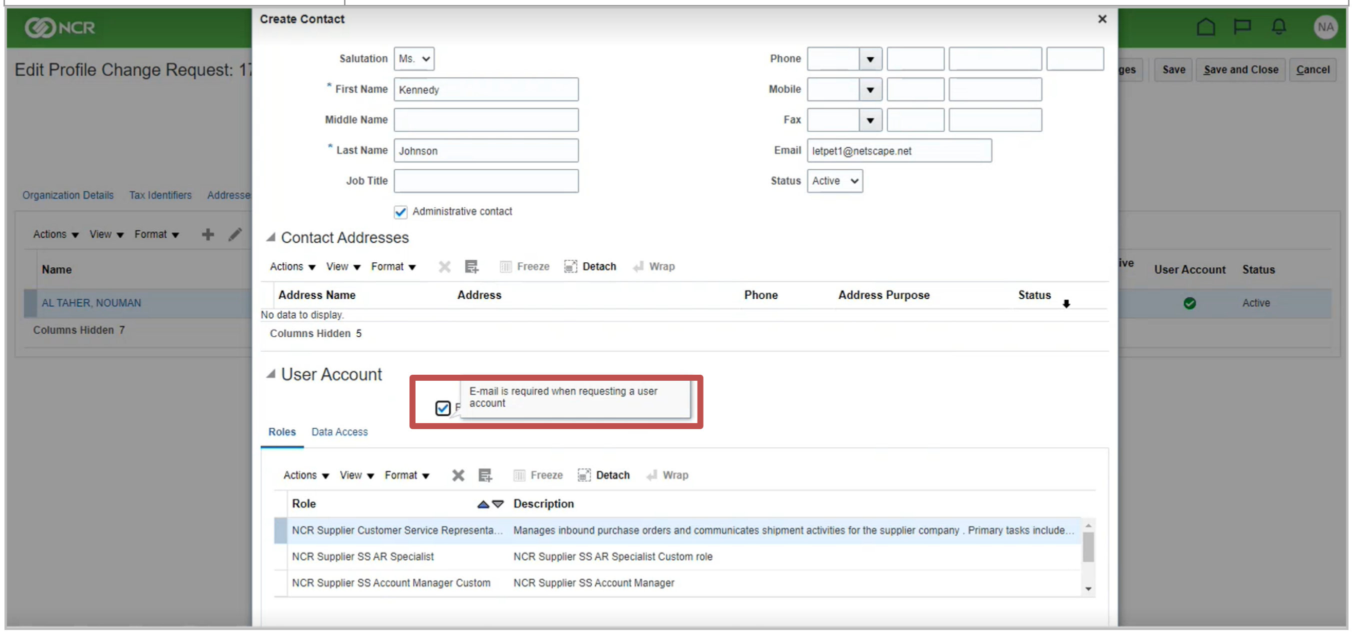
Process Step	Description
2.2	**Adding a New User** **Click** Contacts then the plus "+" icon to add a contact.



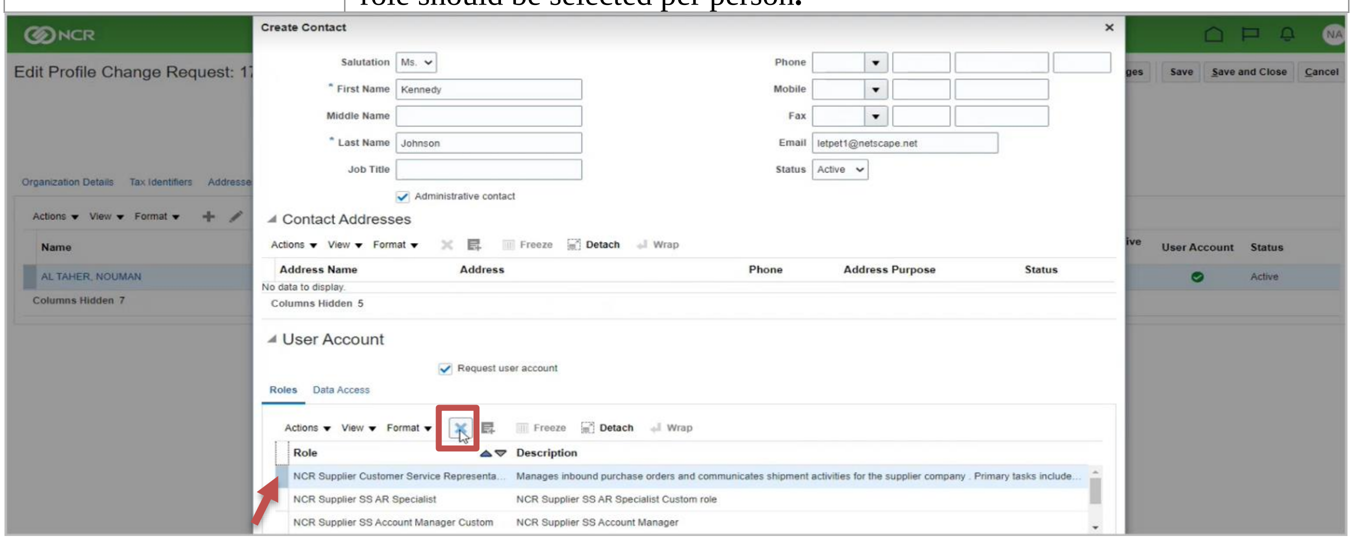
Process Step	Description
2.3	**Adding a New User** The Create Contact window will pop-up. **Update** the **appropriate fields** including required fields noted by an asterisk (*). **Click** the Administrative Contact box. **Update** Contact Addresses details if needed. *A unique email address is required when requesting a new user account.*



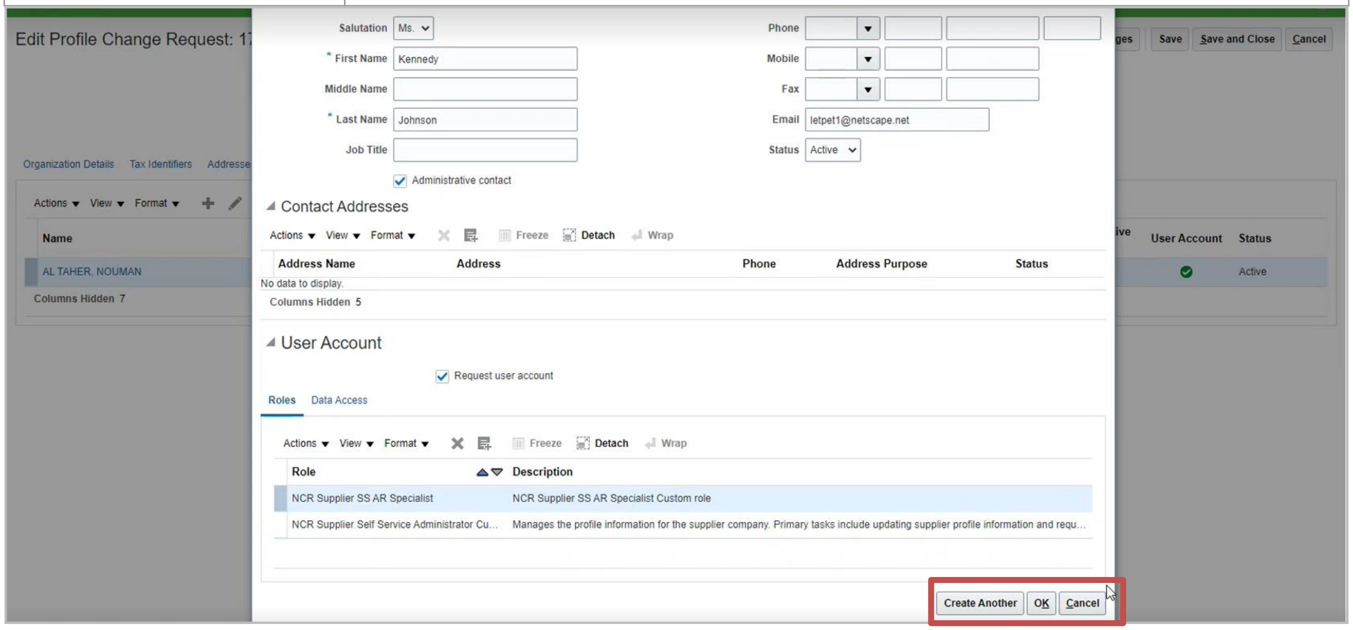
Process Step	Description
2.4	**Adding a New User** If creating a new user account, **click** the **Request User Account** box.



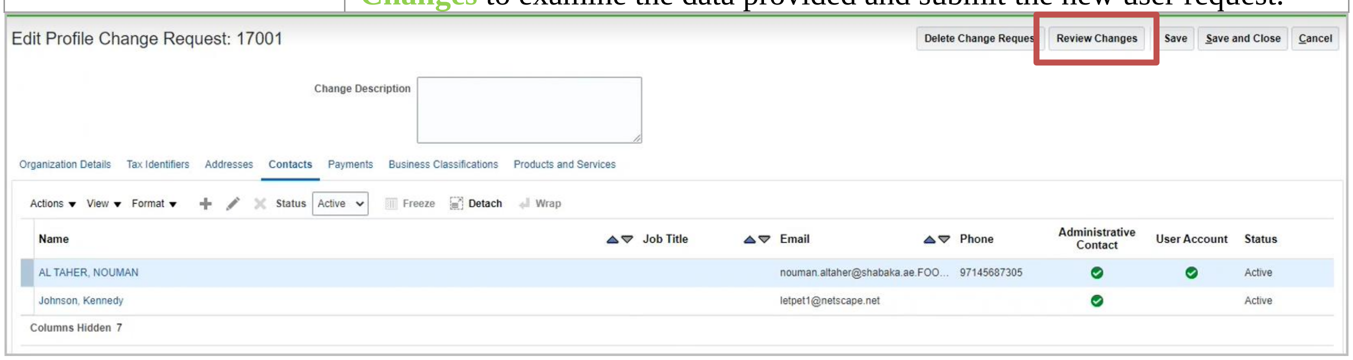
Process Step	Description
2.5	**Adding a New User** The listing of available roles will appear. Select the best **Role** for each user and click the **"X"** icon to remove the roles not needed. Only one (1) user role should be selected per person.



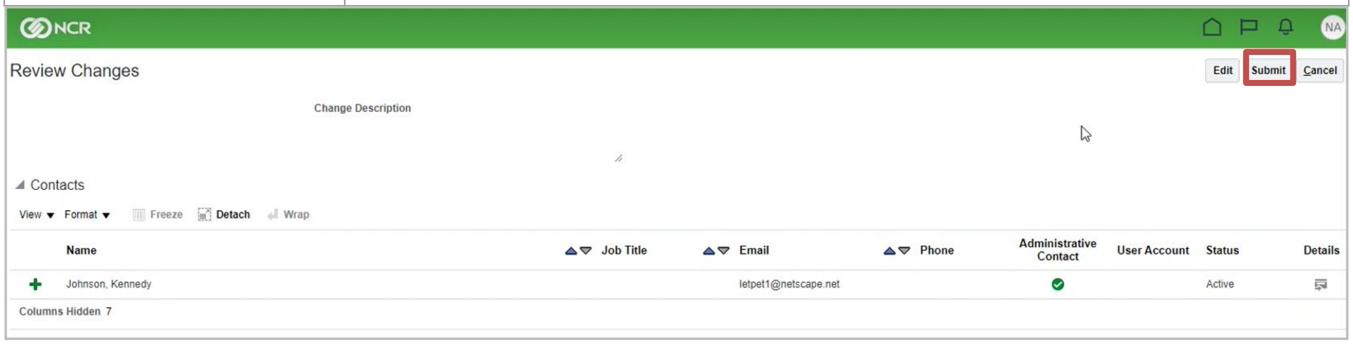
Process Step	Description
2.6	**Adding a New User** **Select** Create Another to add another user**,** OK to proceed with adding the user or Cancel to start over.



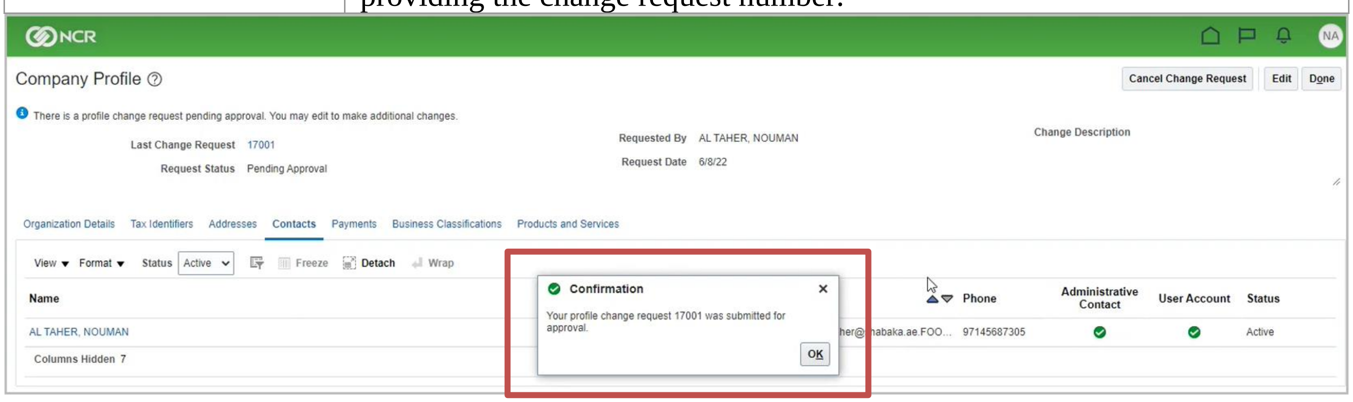
Process Step	Description
2.7	**Adding a New User** When OK is selected, the screen below will appear. **Select** Review Changes to examine the data provided and submit the new user request.



Process Step	Description
2.8	**Adding a New User** **Click** Submit to send the request to the NCR AP Supplier Activity Team.



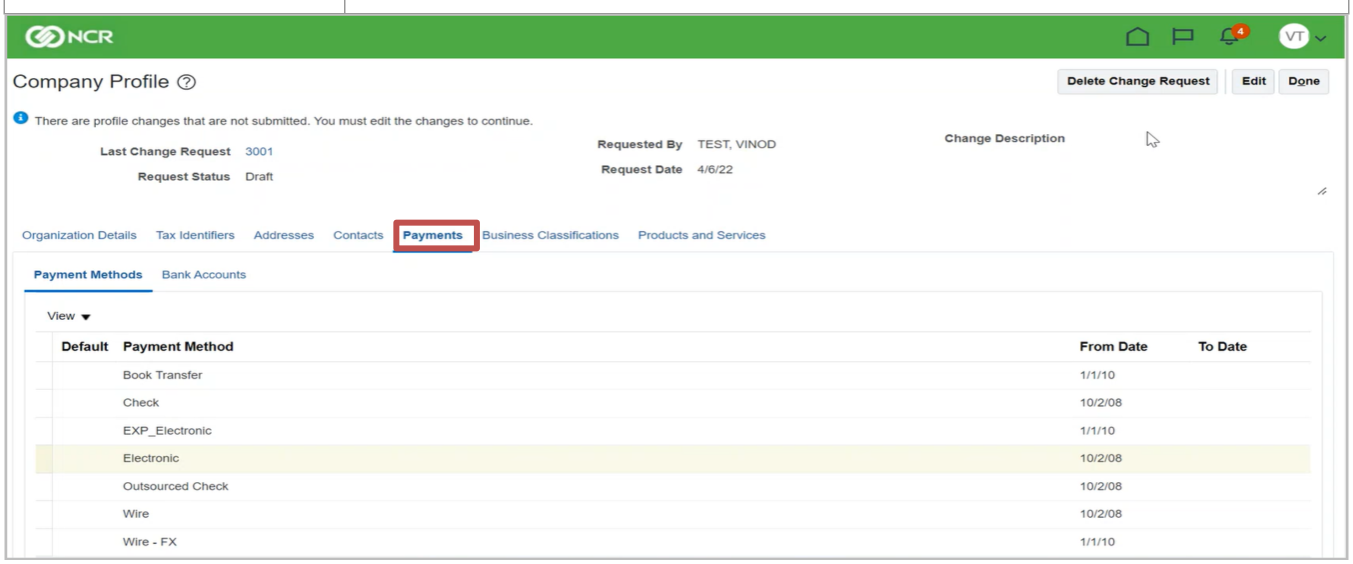
Process Step	Description
2.9	**Adding a New User** The Confirmation popup will appear when the user request is submitted providing the change request number.



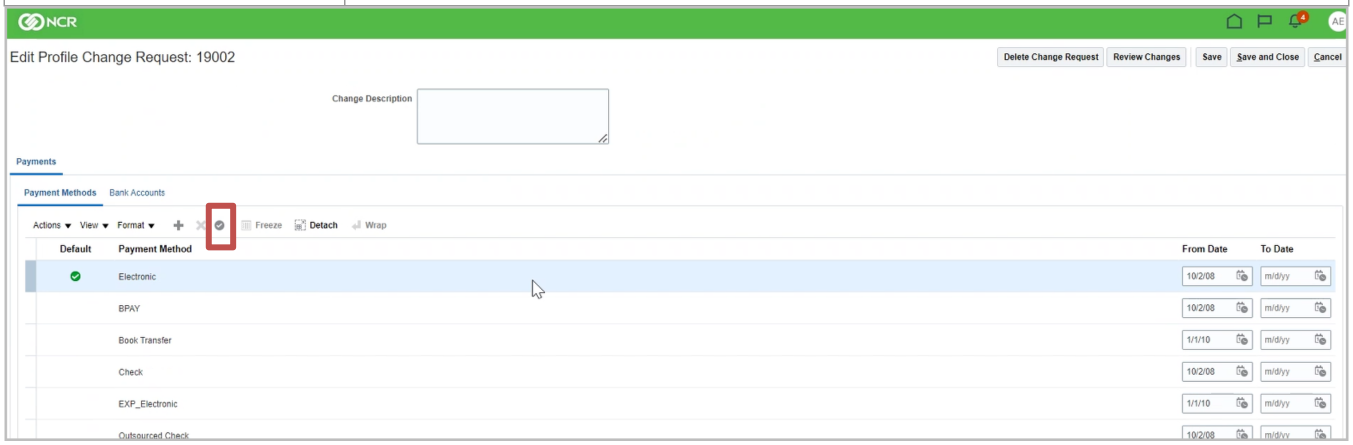
Process Step	Description
2.10	**Adding a New User** Once the new user request is approved by the NCR AP Supplier Activity Team, an email will be sent to the user (Example on page 2). **Go to** Manage Profile then **click** Contacts. A check mark will appear **in** the User Account section of the user's profile to confirm the user's active status.

3.2 Updating Payments and Banking

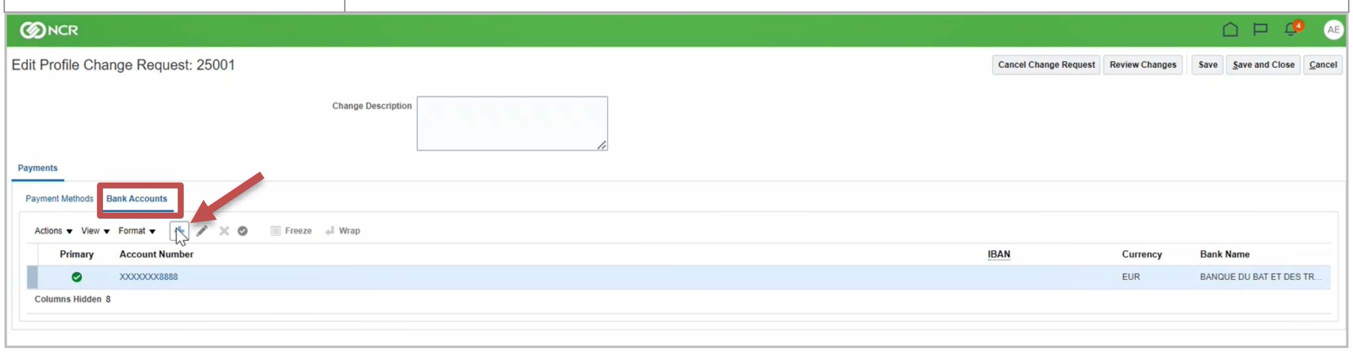
Process Step	Description
3	**Updating Payment Methods** **Select** Payments to update the Payment Methods and Bank Accounts. The NCR preferred method of payment is Electronic and should rarely change after set-up.



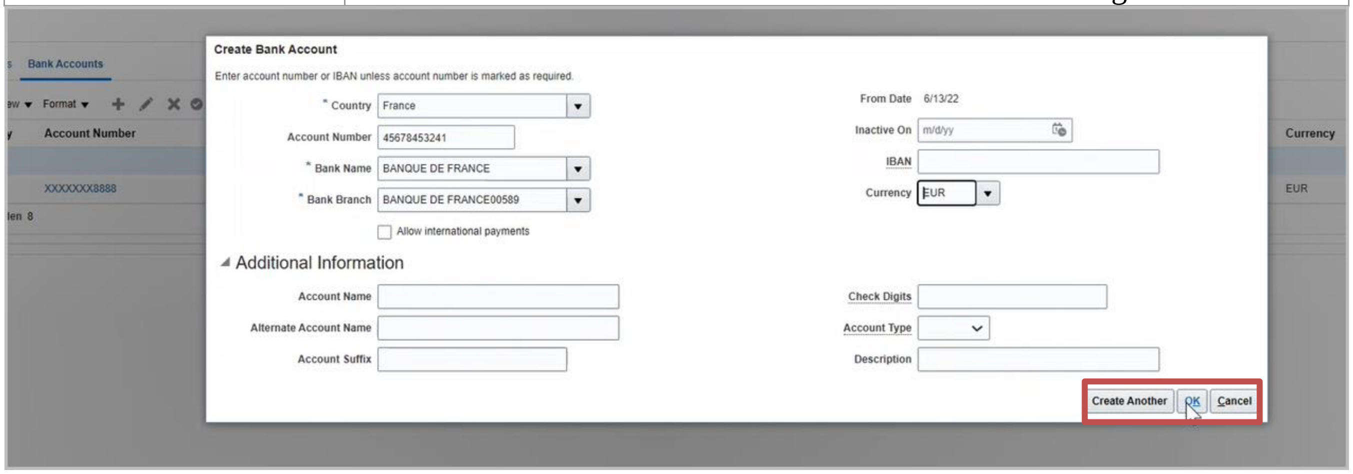
Process Step	Description
3.1	**Selecting the Payment Methods** **Click** the right mark icon to **select the** Payment Method.



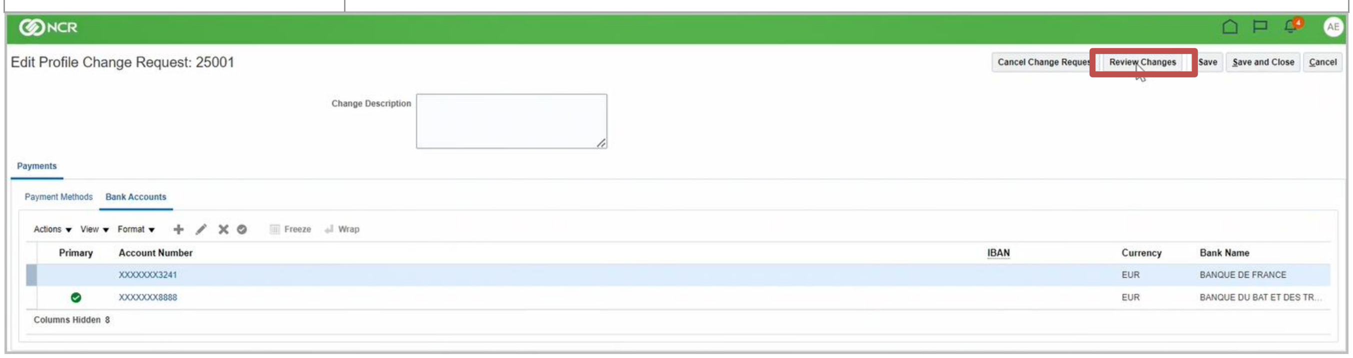
Process Step	Description
3.2	**Adding Bank Accounts** **Select** the Bank Accounts tab. **Click** "+" to create a new bank account. Bank Accounts can be edited with the pencil icon .



Process Step	Description
3.3	**Adding Bank Accounts** **Enter** Bank Account details. **Click** OK to close the window **or** Cancel to not save changes.

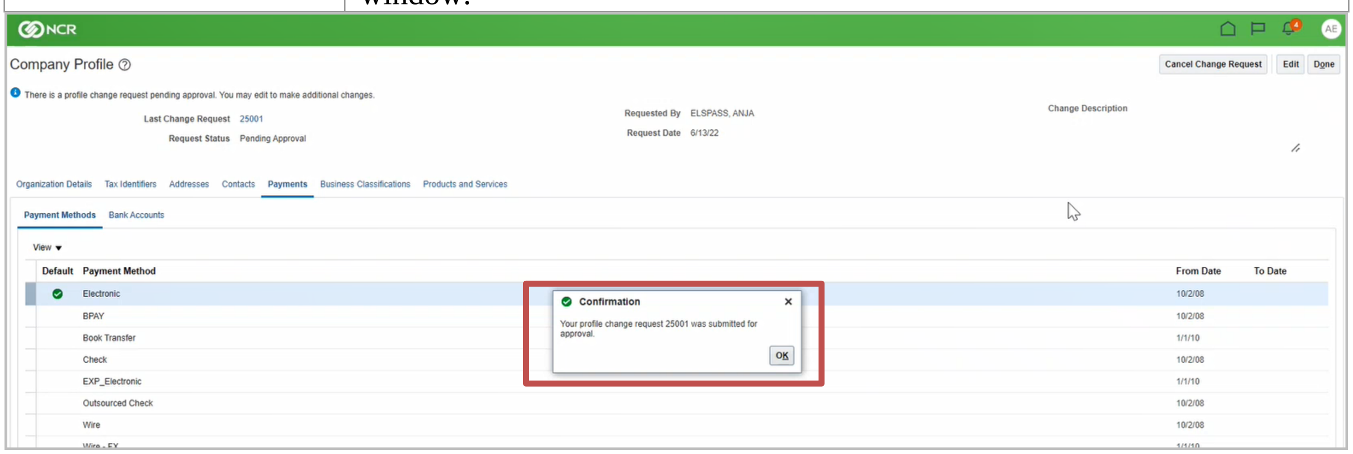


Process Step	Description
3.4	**Adding Bank Accounts** **Click** Review Changes to submit the new bank account**.**

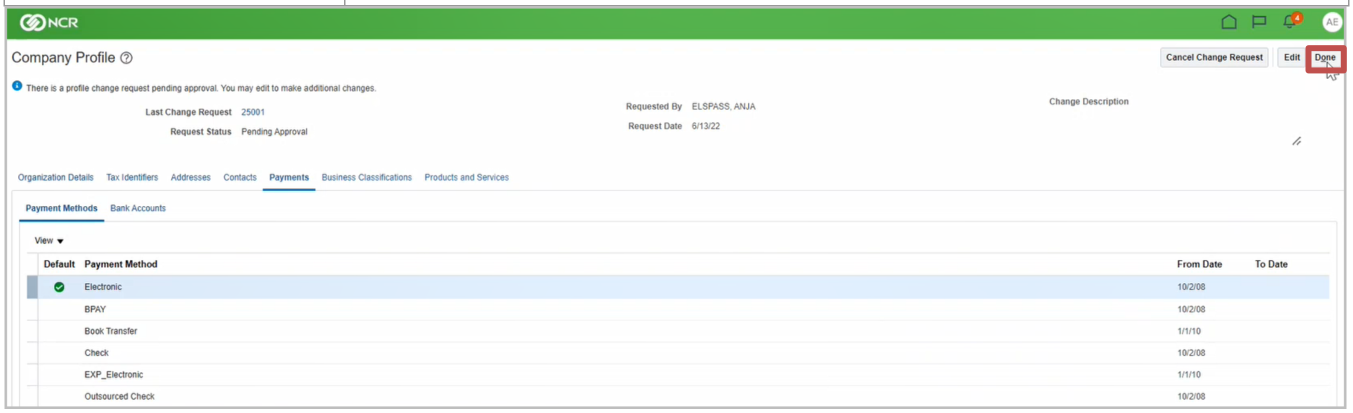


Process Step	Description
3.5	**Adding Bank Accounts** **Click** **Submit** to add the bank account.

Process Step	Description
3.6	**Adding Bank Accounts** The **Confirmation** popup will appear when the user request is submitted providing the change request number. The NCR AP Supplier Activity Team will review the request for reasonableness. **Click** **OK** to close the window.

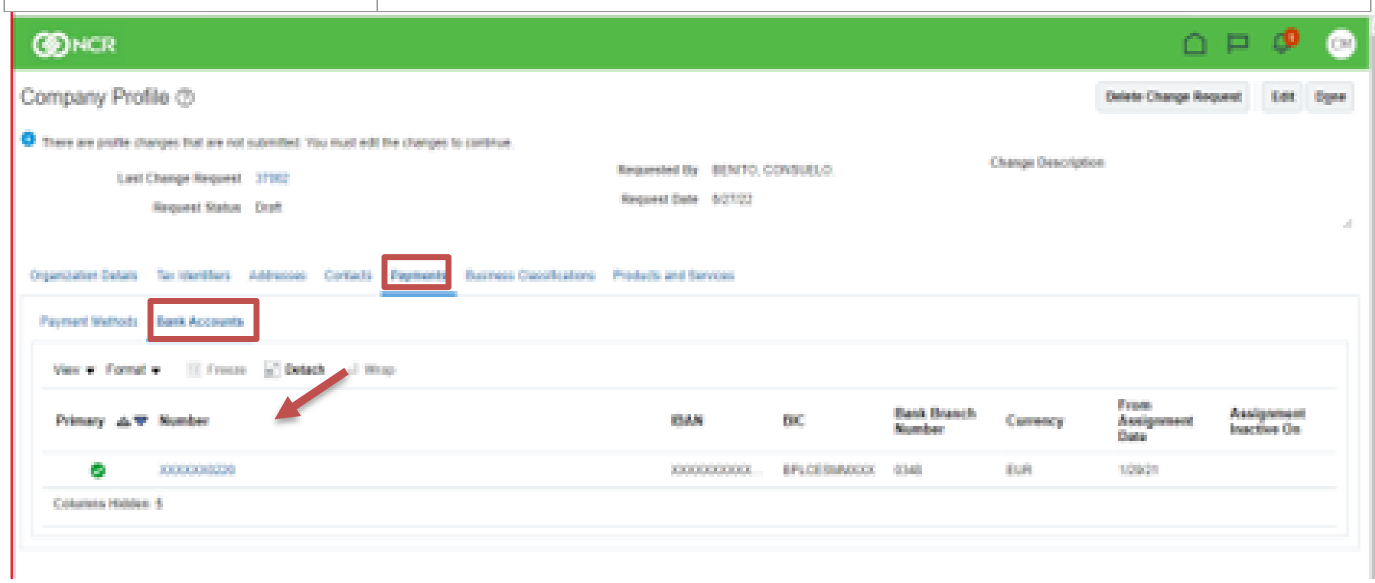


Process Step	Description
3.7	**Adding Bank Accounts** **Click** **Done** to close the window.

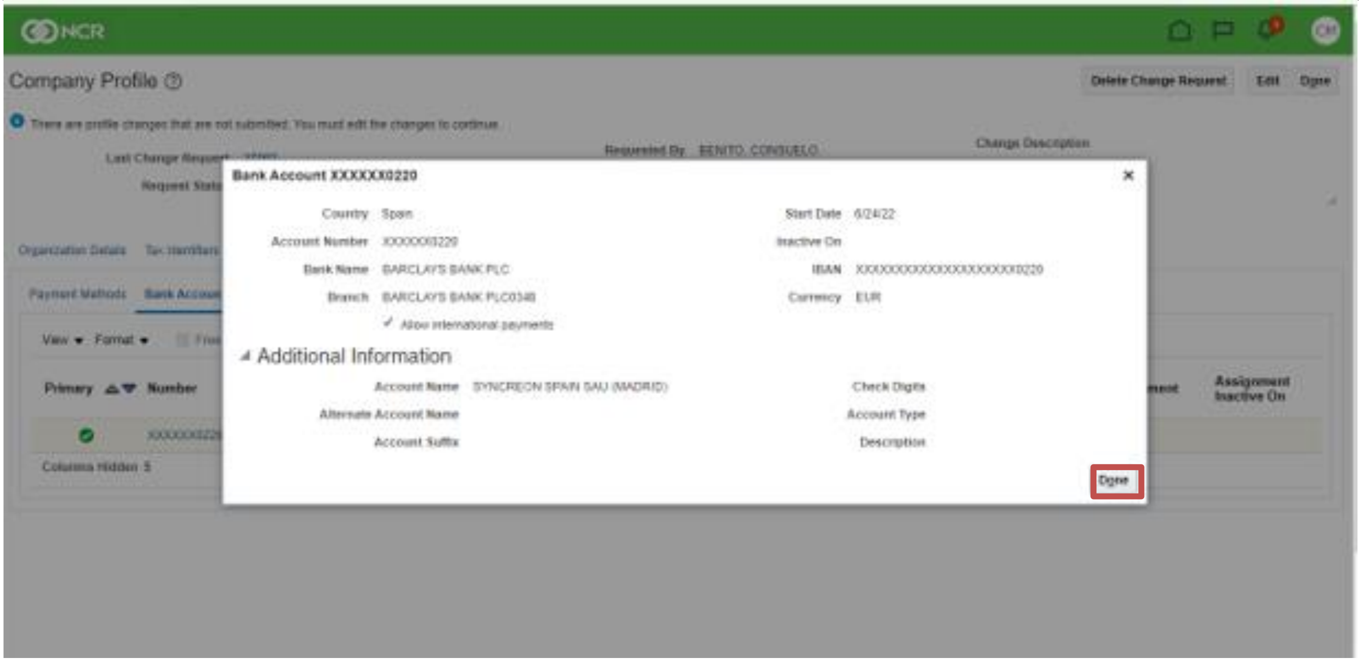


3.3 Viewing & Verifying Banking Details

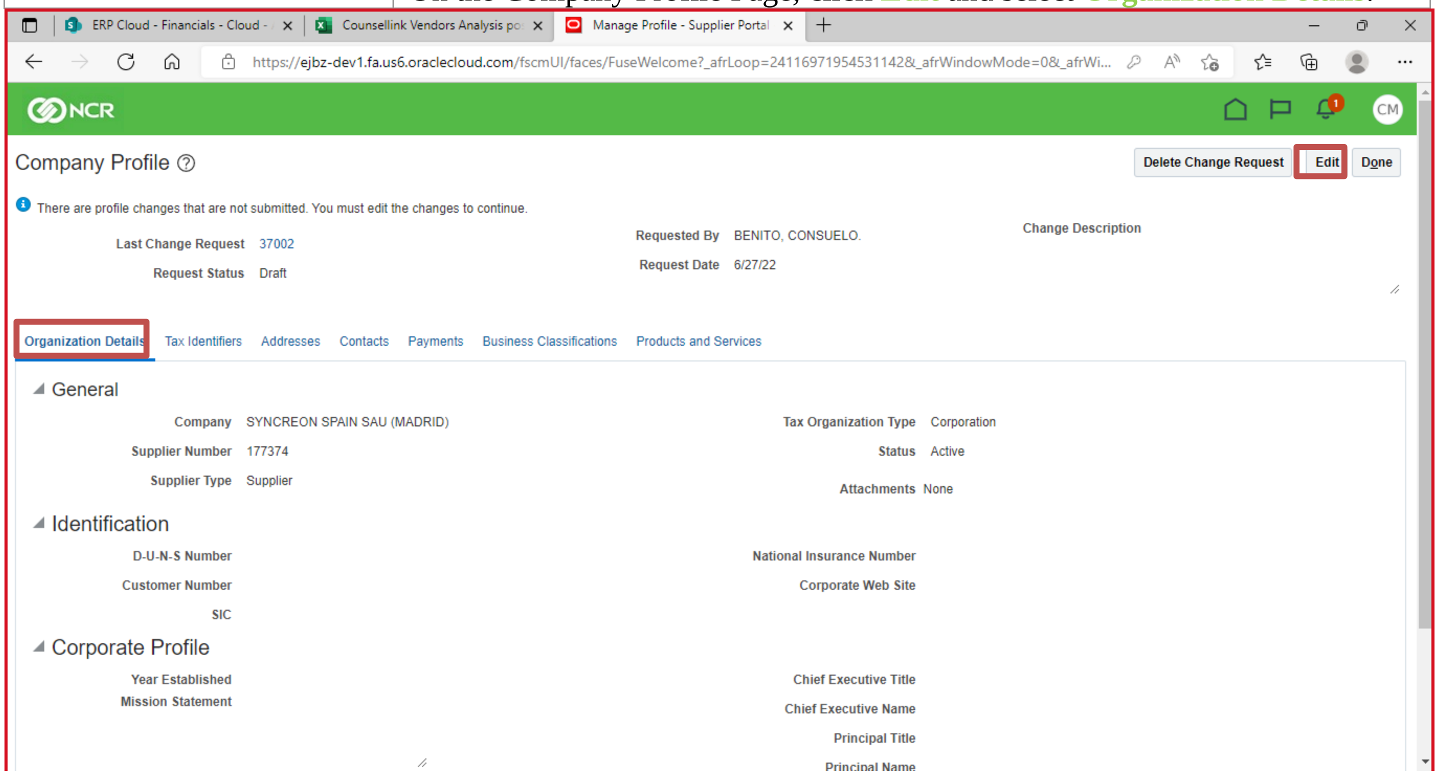
Process Step	Description
4.0	**Viewing & Verifying Banking Details** Click on **Payments** and **Bank Accounts** on the Company Profile Page to view the bank details.



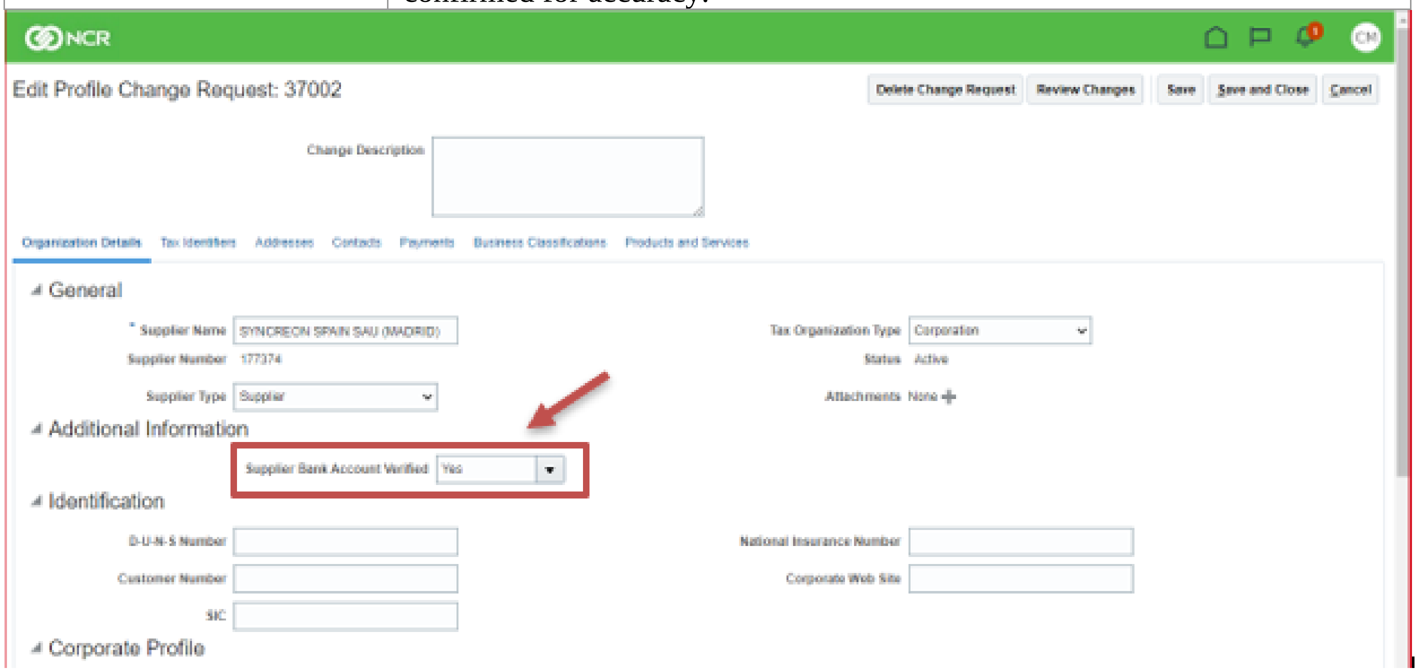
Process Step	Description
4.1	**Viewing & Verifying Banking Details** **Click** on the truncated Bank Account Number hyperlink to view the various bank details in the popup. **Click** **Done** to close the Bank Account window.



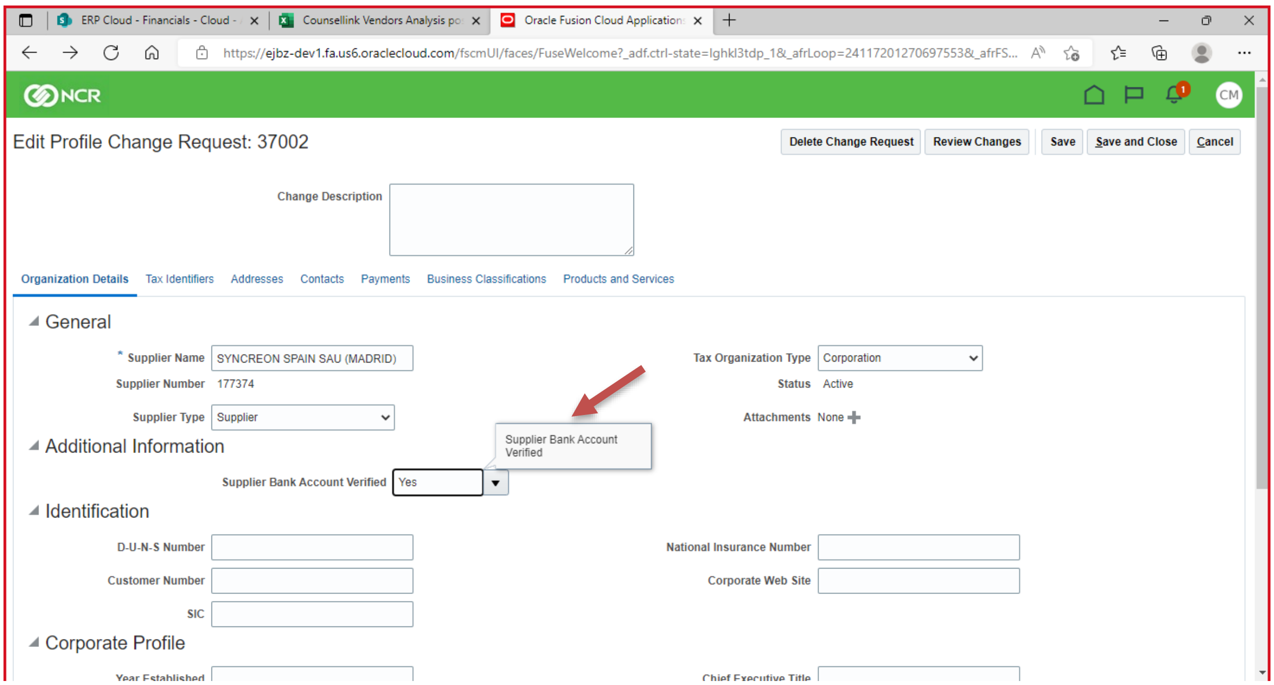
Process Step	Description
4.2	**Viewing & Verifying Banking Details** **IMPORTANT: In order for a payment to be issued to your company from Oracle Cloud for the first time, you must perform the following verification steps. Otherwise, <u>your payments will be placed on hold.</u>** On the Company Profile Page, **click** Edit and select Organization Details.



Process Step	Description
4.3	**Viewing & Verifying Banking Details** After all the banking and tax details have been confirmed, select **Yes** in the **Supplier Bank Account Verified** flag drop-down menu within the **Additional Information** section. **REMINDER**: If the banking information is incorrect or the flag is not marked as Yes, your payments will be placed on hold until the data is confirmed for accuracy.

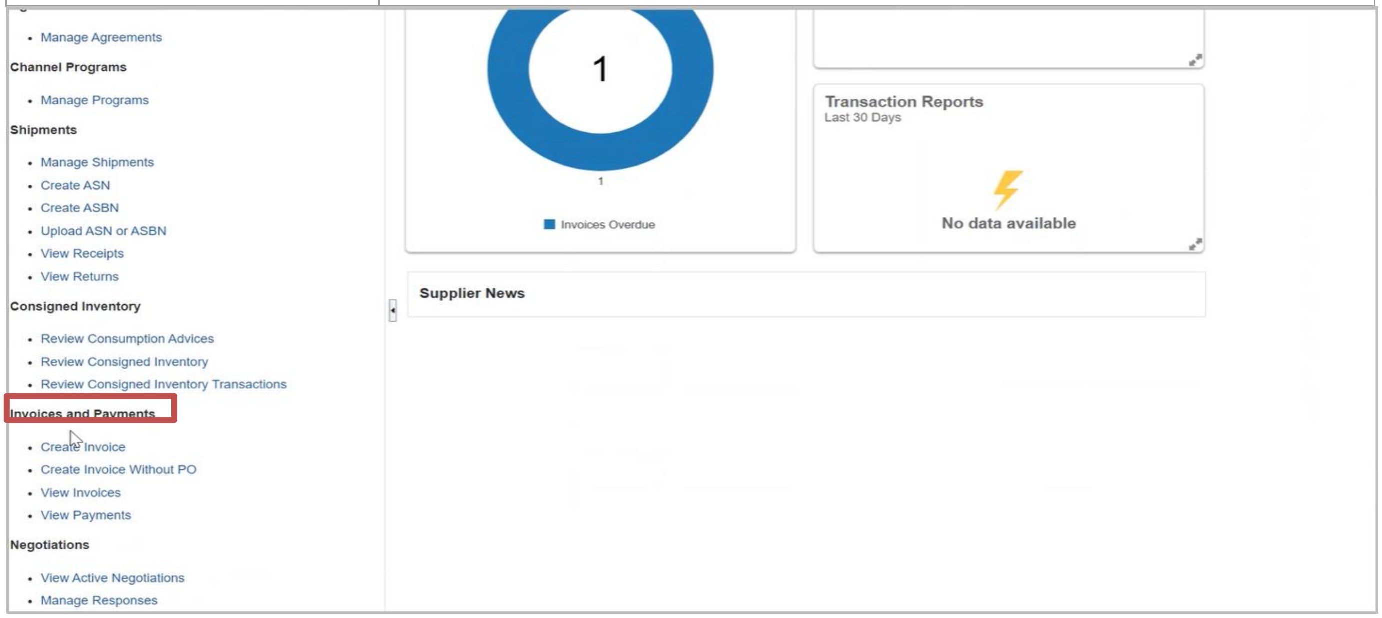


Process Step	Description
4.4	**Viewing & Verifying Banking Details** After **Yes** is selected in the **Supplier Bank Account Verified** flag field, you will see the message confirming the verification option has been chosen. NOTE: This selection signifies the bank account information is accurate and payments will be successfully processed without delay.

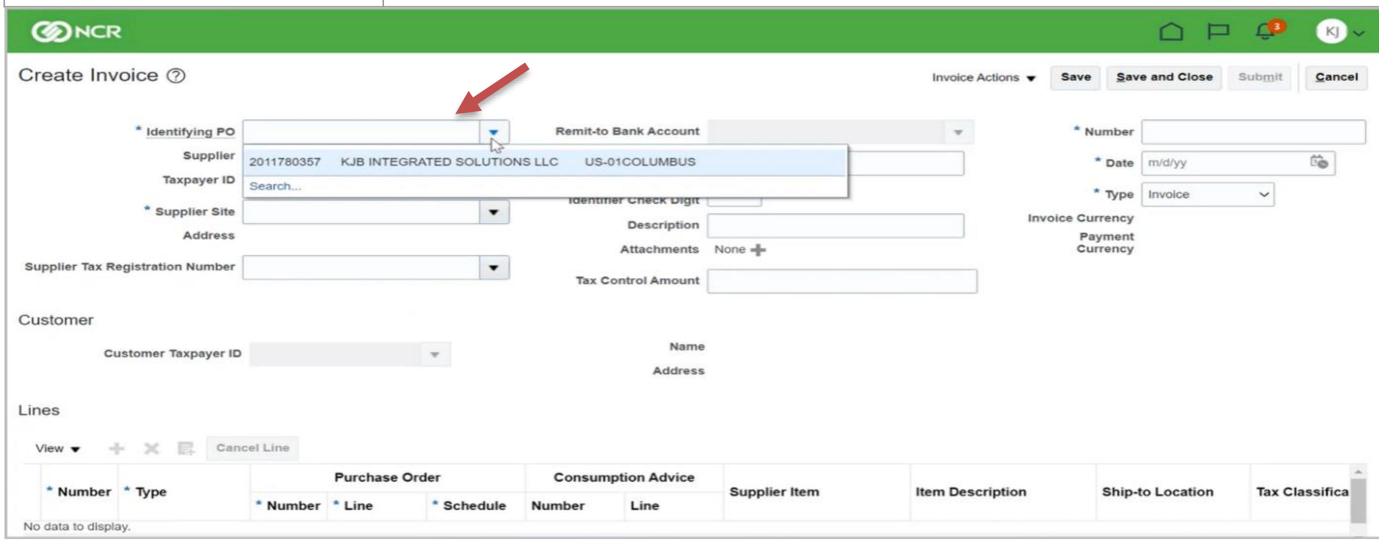


4. Creating Invoice (Purchase Order Invoice)

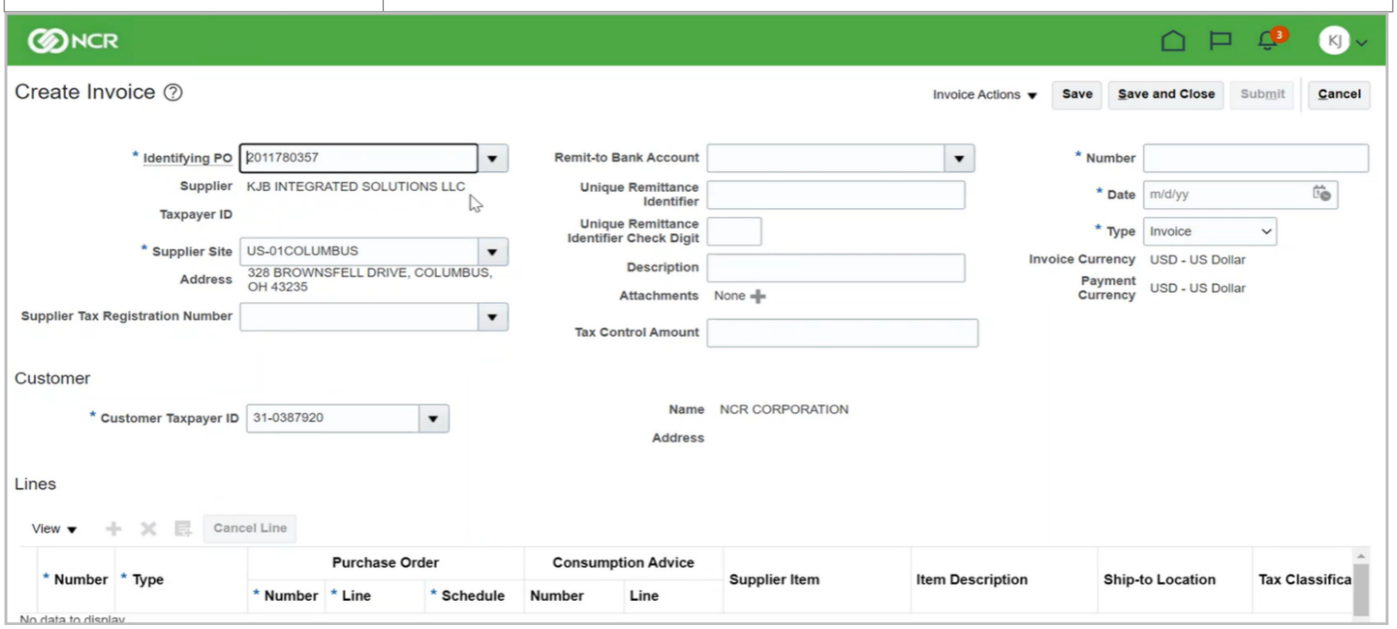
Process Step	Description
1	**Creating Invoice (PO Invoice)** On the Supplier Portal homepage, go to **Tasks** then down to the **Invoices and Payments section.** Select **Create Invoice**.



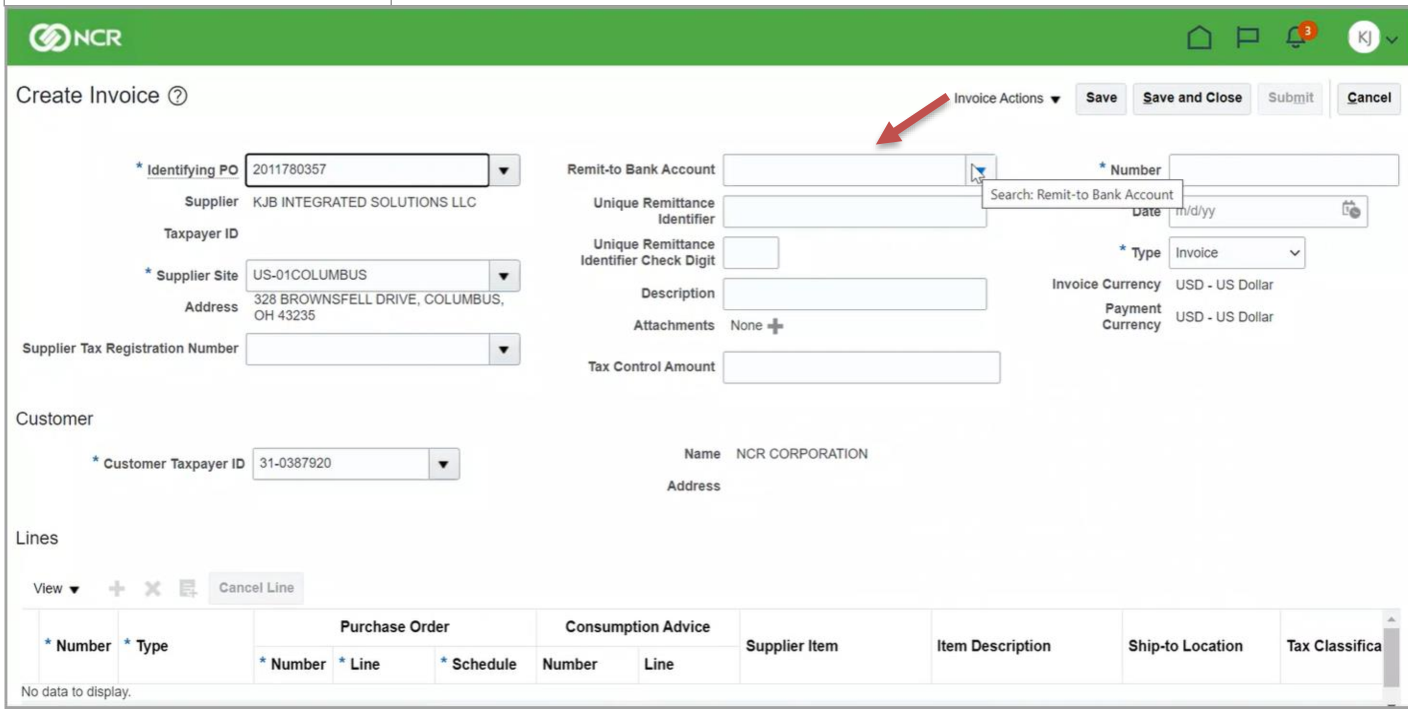
Process Step	Description
2	**Creating Invoice (PO Invoice)** Update the appropriate field including required fields noted by asterisk (*). **Click** the **Identifying PO dropdown** to select or search for a PO.



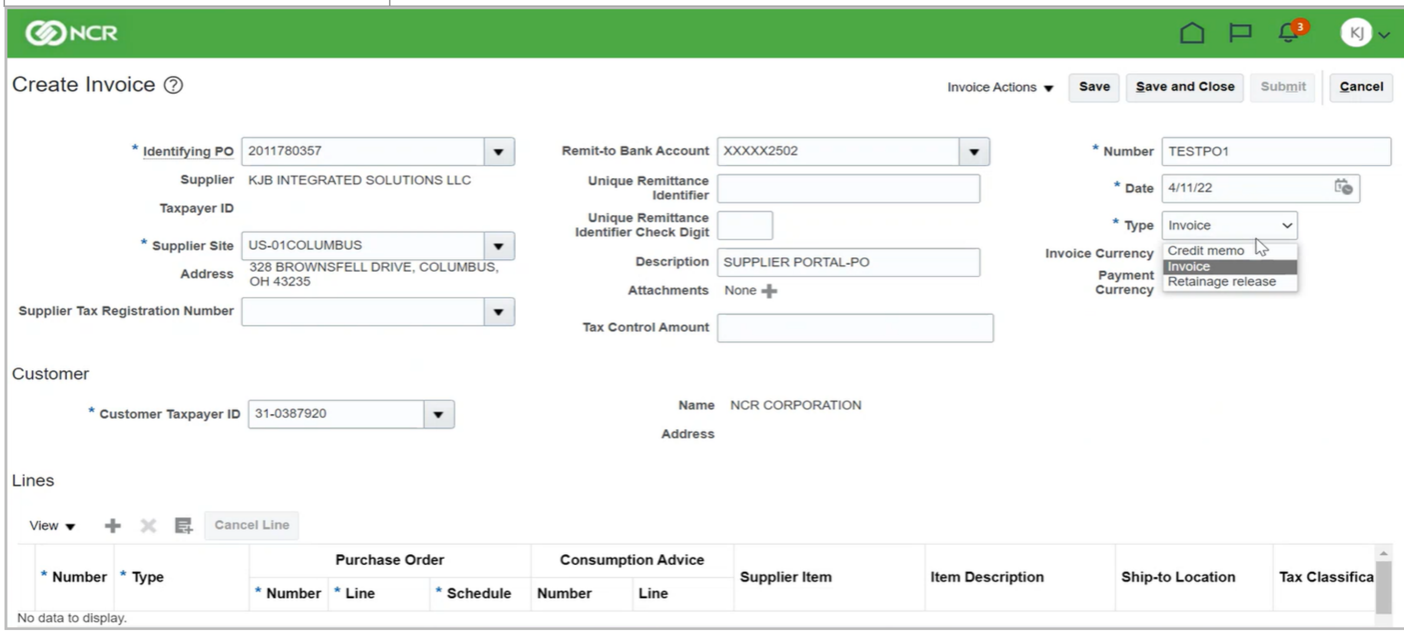
Process Step	Description
3	**Creating Invoice (PO Invoice)** Once selected, applicable fields from the PO will auto-populate on the screen.



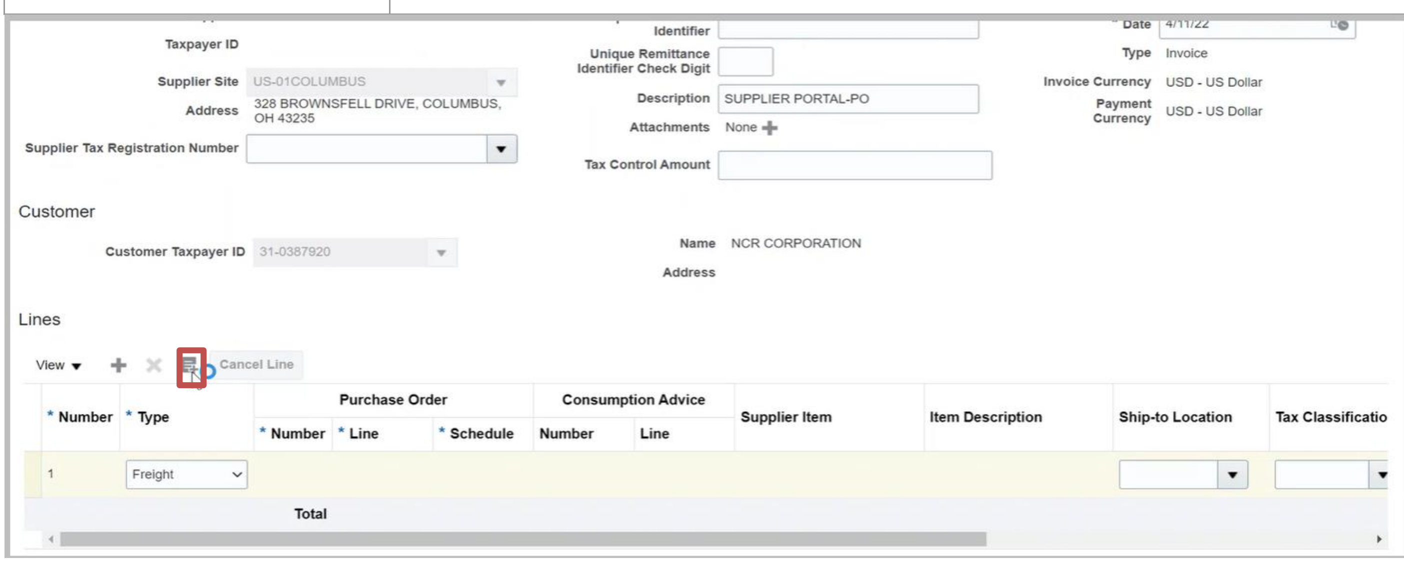
Process Step	Description
4	**Creating Invoice (PO Invoice)** **Click** the **Remit-to Bank Account** dropdown and select the bank.



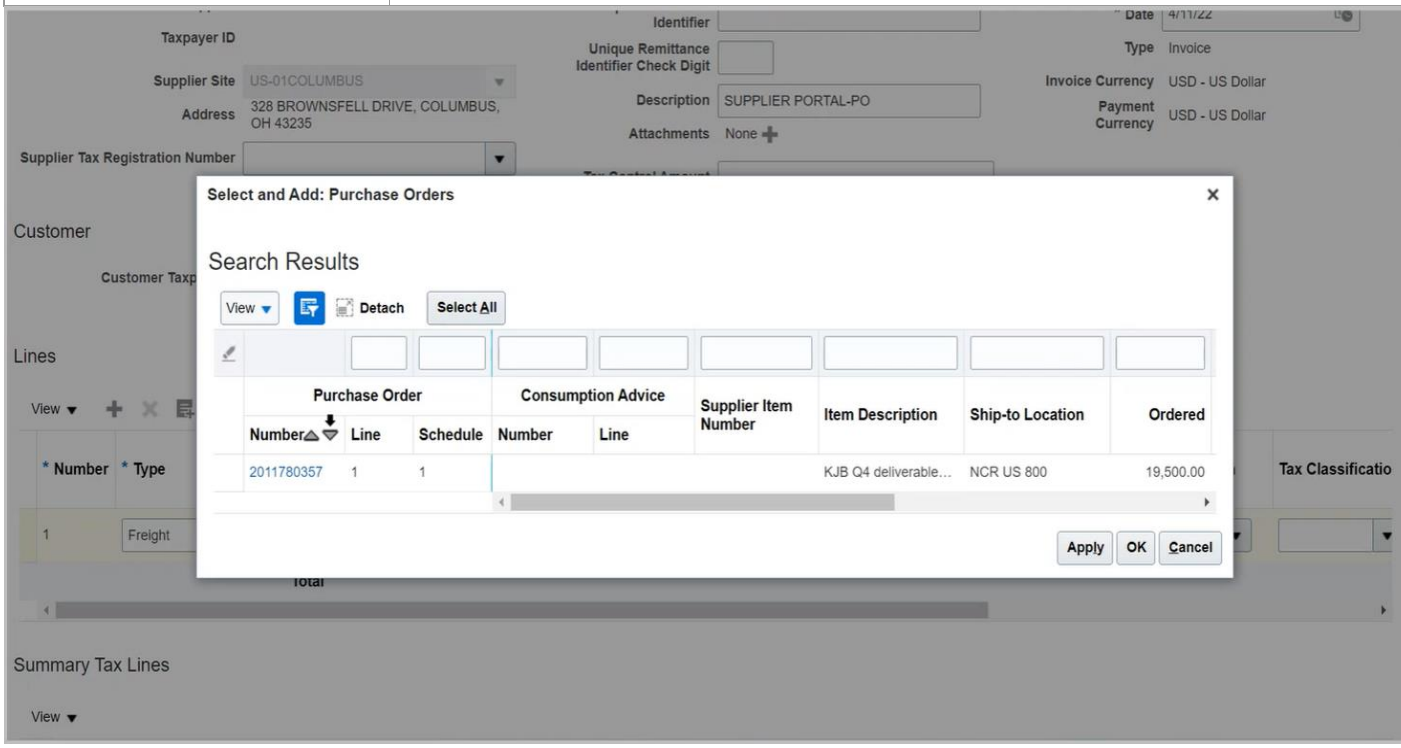
Process Step	Description
5	**Creating Invoice (PO Invoice)** **Update** the **appropriate remaining fields including** **Number**, **Date, Type** and **Customer Taxpayer ID** which are **required**.



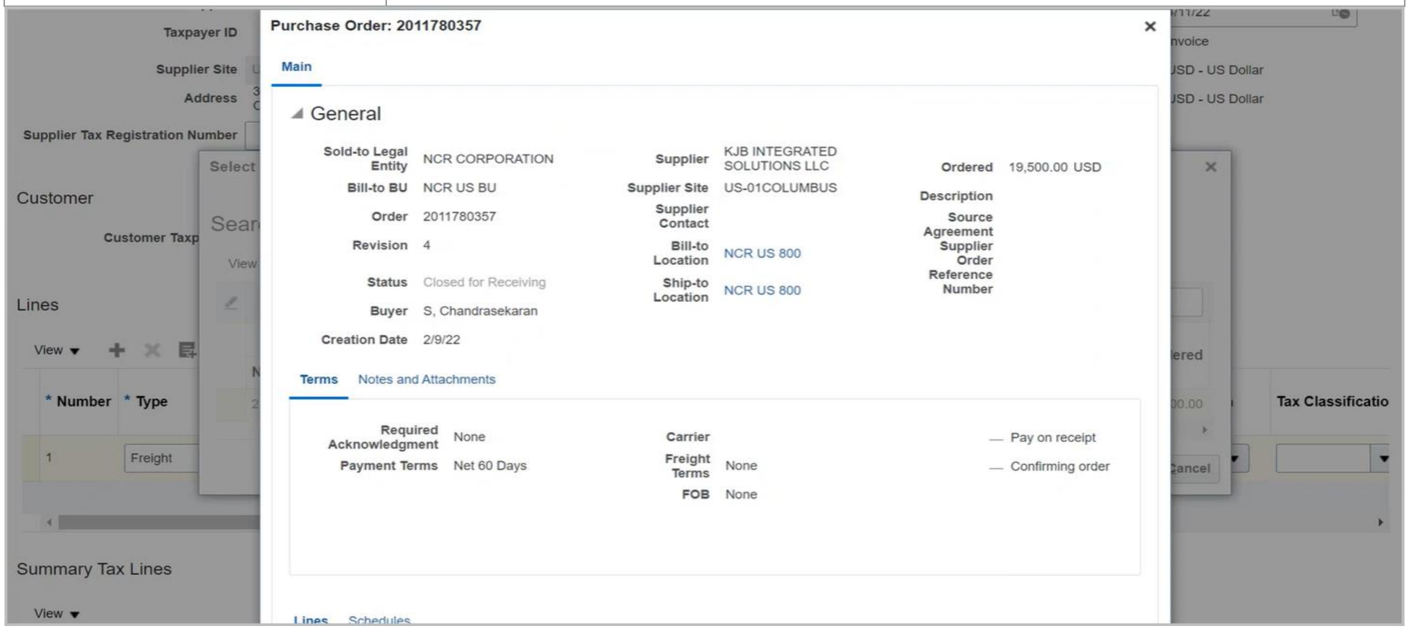
Process Step	Description
6	**Creating Invoice (PO Invoice)** In the **Lines** section, **click** the **Document icon** to select the PO lines.



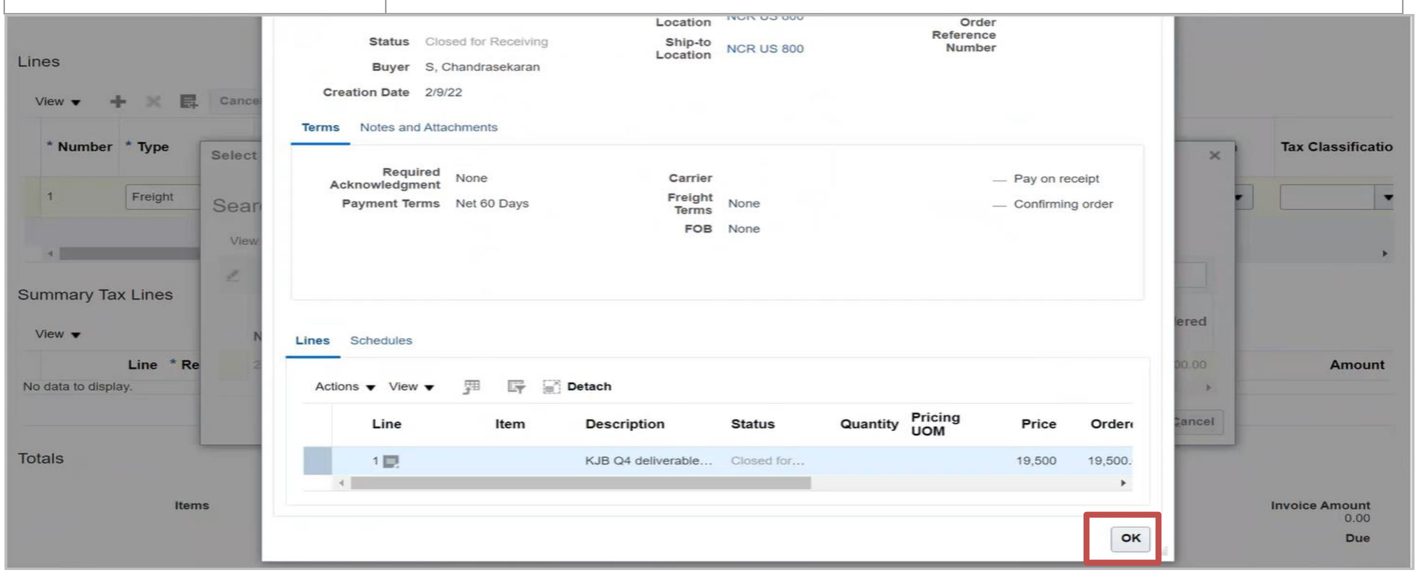
Process Step	Description
7	**Creating Invoice (PO Invoice)** **Click** the PO **Number** to view the PO.



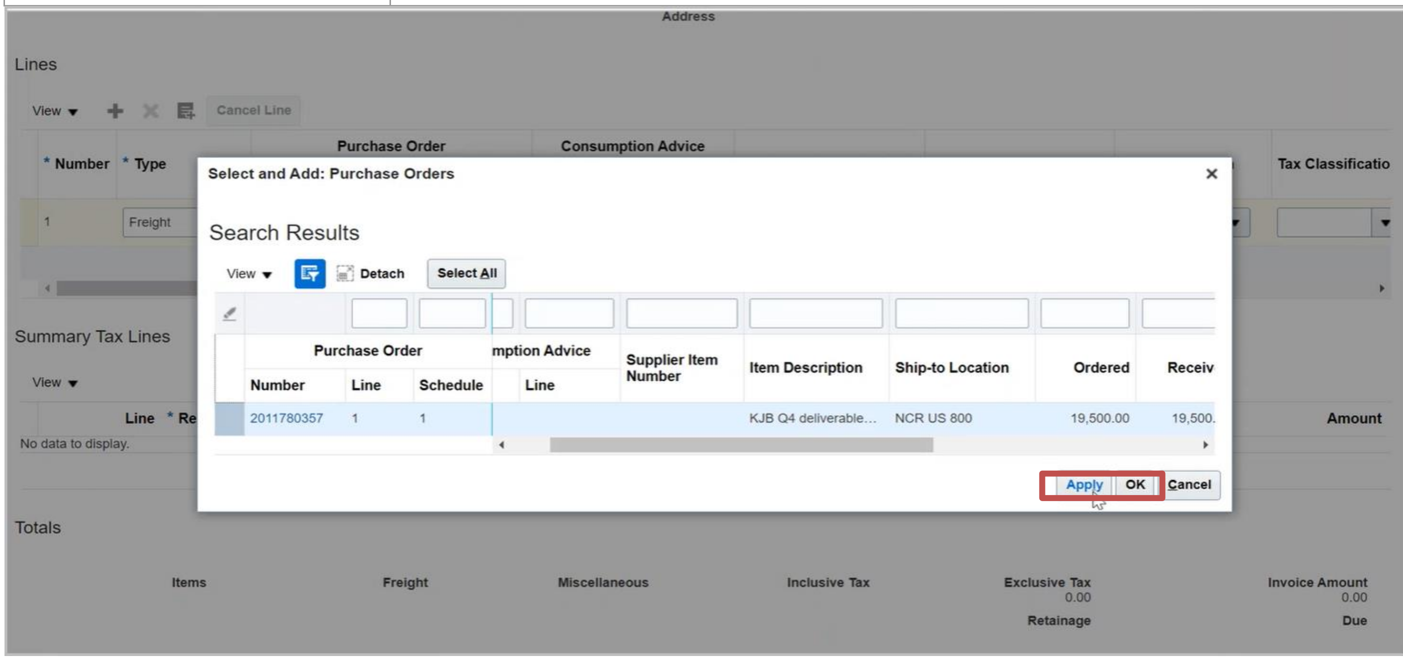
Process Step	Description
8	**Creating Invoice (PO Invoice)** The PO details will pop up on the screen.



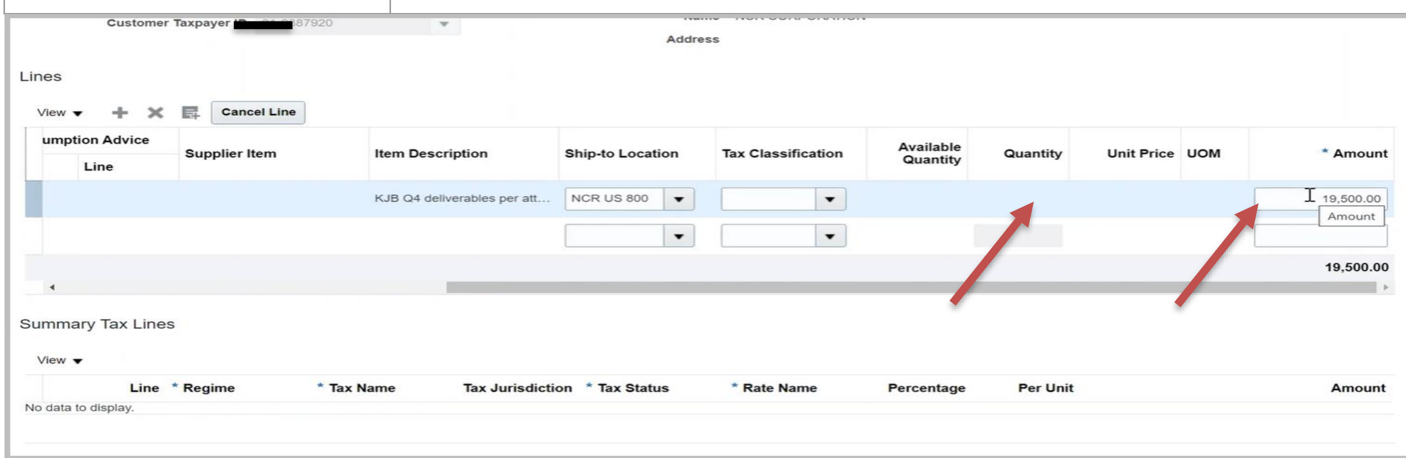
Process Step	Description
9	**Creating Invoice (PO Invoice)** **Select** the **PO,** then **Click OK** to close the PO window.



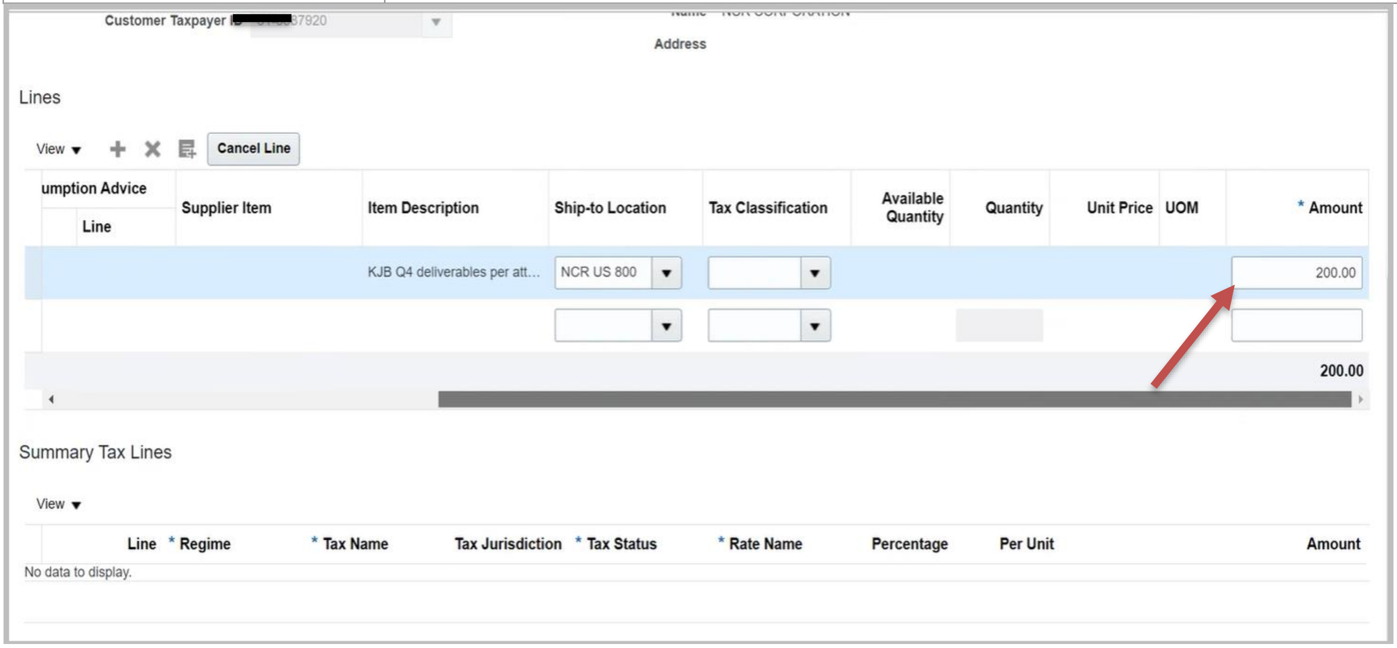
Process Step	Description
10	**Creating Invoice (PO Invoice)** **Click** Apply to select the PO **then** OK to close the PO window.



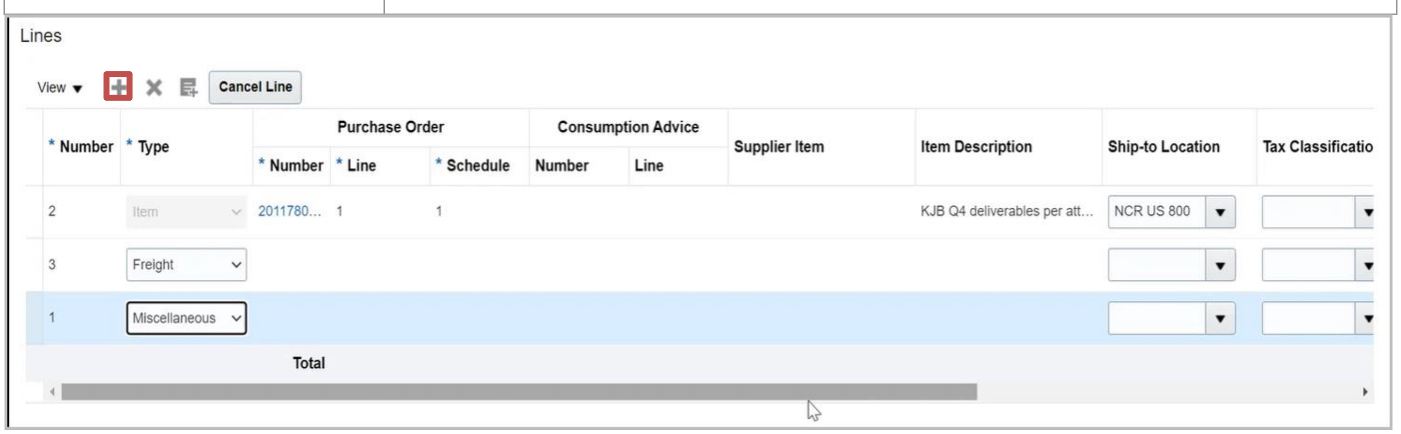
Process Step	Description
11	**Creating Invoice (PO Invoice)** **Adjust** the Amount **or** Quantity of the PO **if needed** for partial purchases as per the invoice.



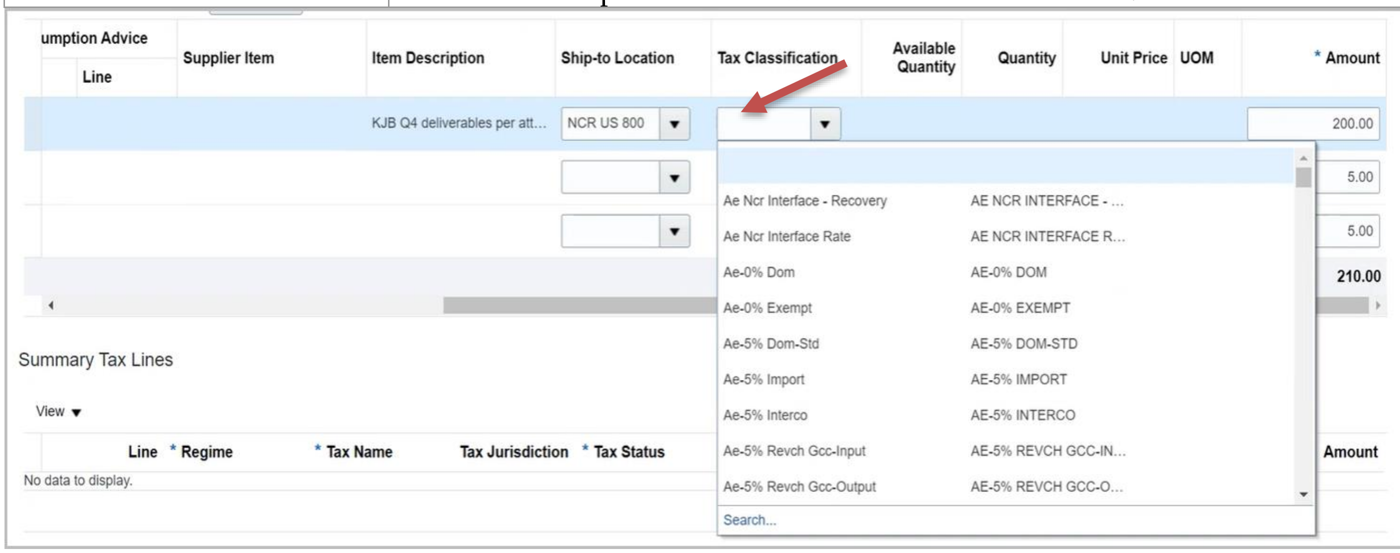
Process Step	Description
11.1	**Creating Invoice (PO Invoice)** Example of partial invoice application. Applying $200 of $19,500 PO (Purchase Order).



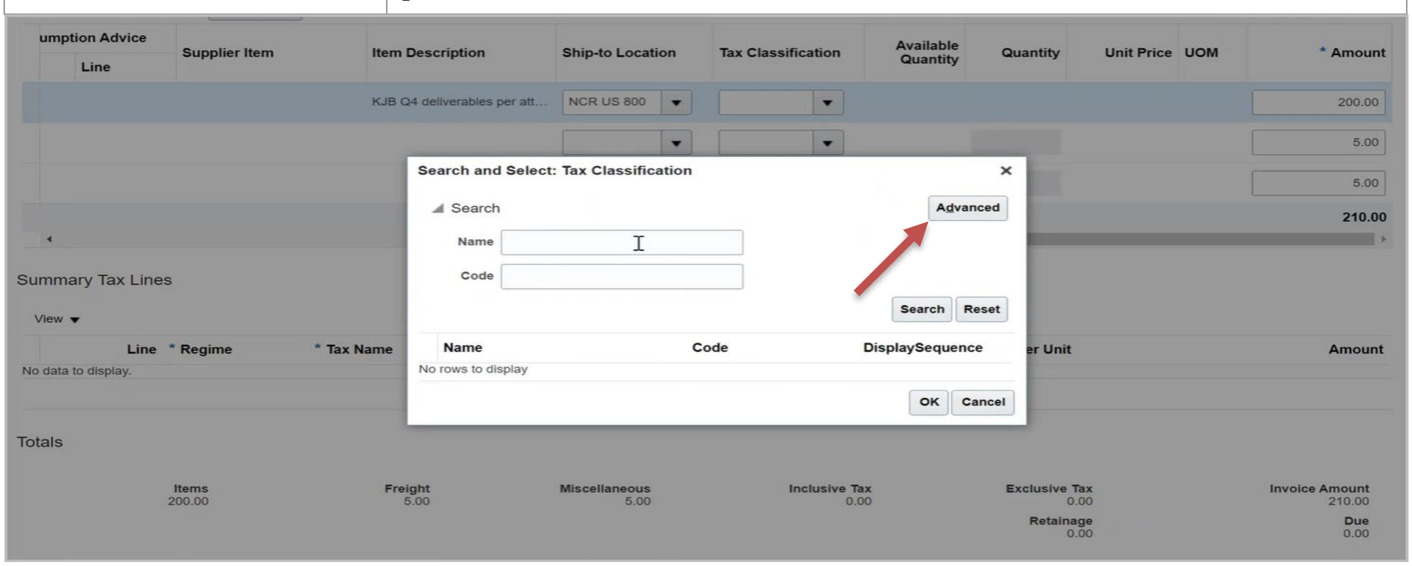
Process Step	Description
12	**Creating Invoice (PO Invoice)** **Click** the "+" to add additional lines if needed i.e., freight, miscellaneous, etc.



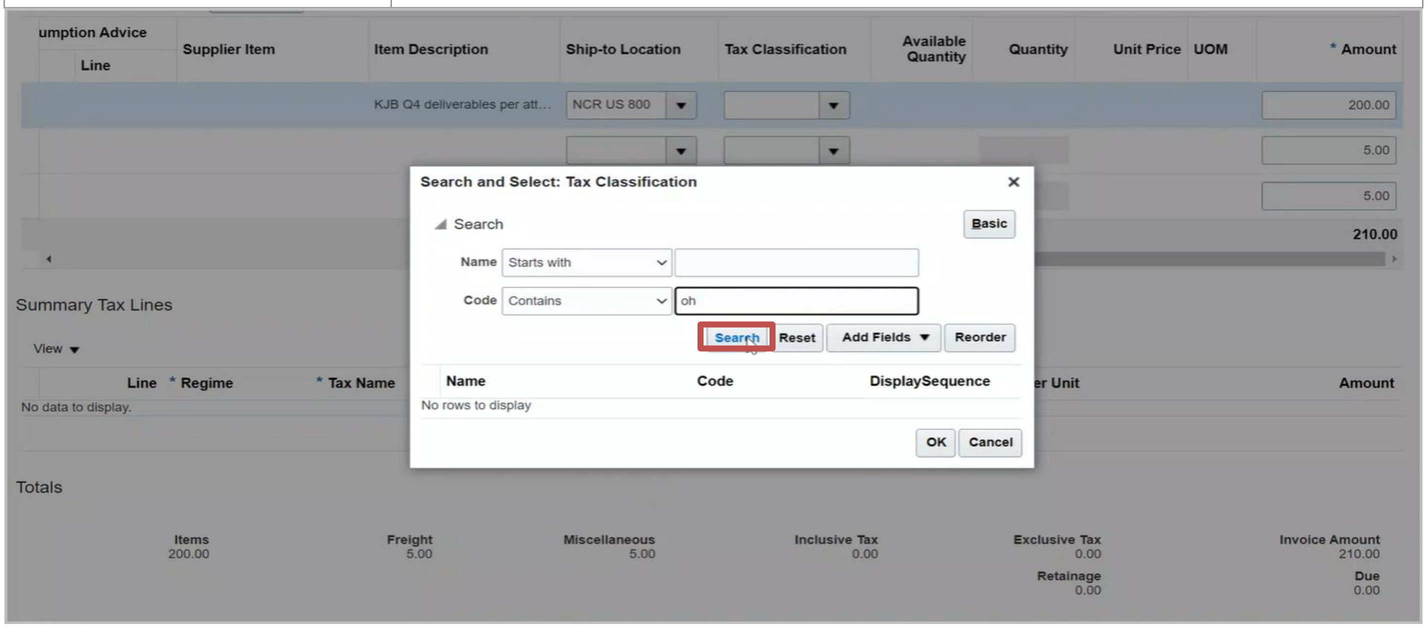
Process Step	Description
13	**Creating Invoice (PO Invoice)** If tax is on the invoice**, click** the **Ship-to Location** dropdown to find the delivery location. Then **click** the **Tax Classification** dropdown to get the tax code. If the invoice does not contain tax, go to Process Step 15. The Ship-to Location will determine the tax code.



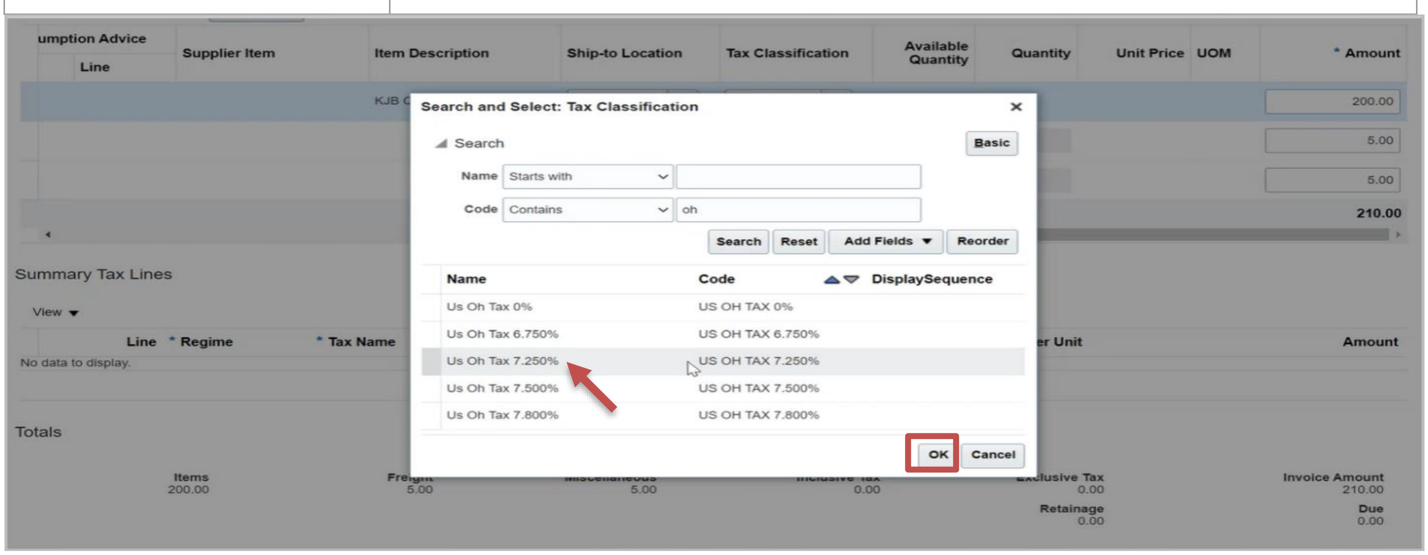
Process Step	Description
14	**Creating Invoice (PO Invoice)** Enter the search criteria to perform a **Basic** search or click **Advanced** to perform an advanced search for the location code.



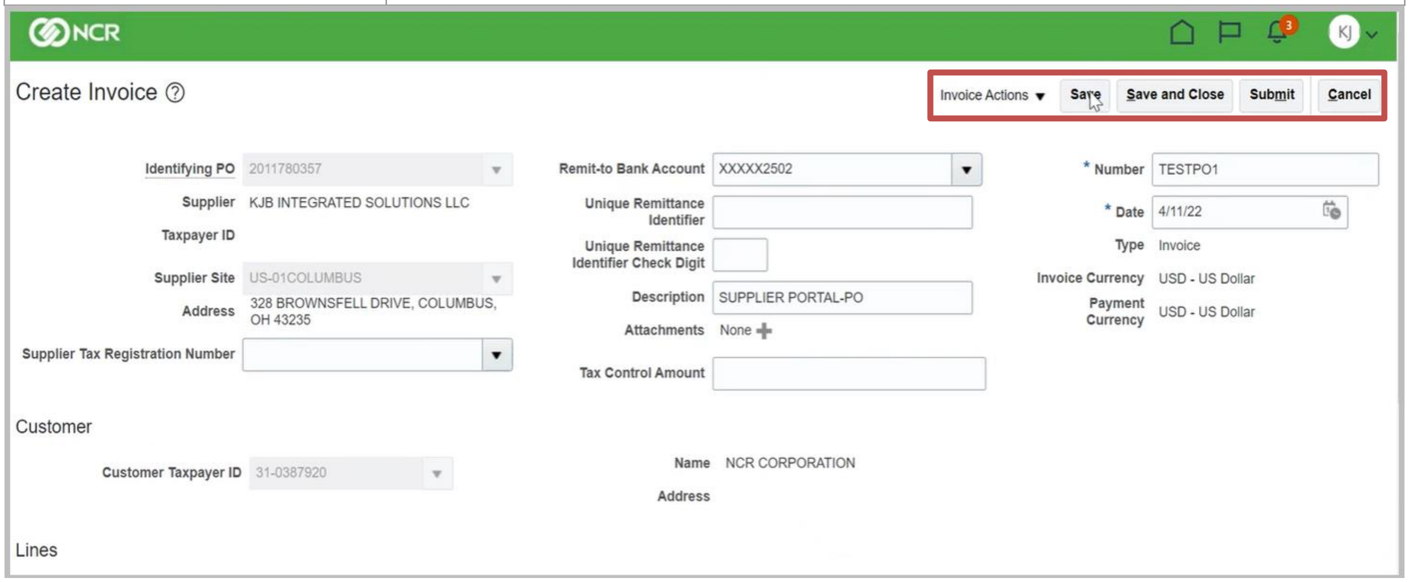
Process Step	Description
14.1	**Creating Invoice (PO Invoice)** **Enter** the advanced search criteria and the key search information. Then **click** **Search**.



Process Step	Description
14.2	**Creating Invoice (PO Invoice)** **Select** the **Name** for the appropriate tax code then **click** **OK.**



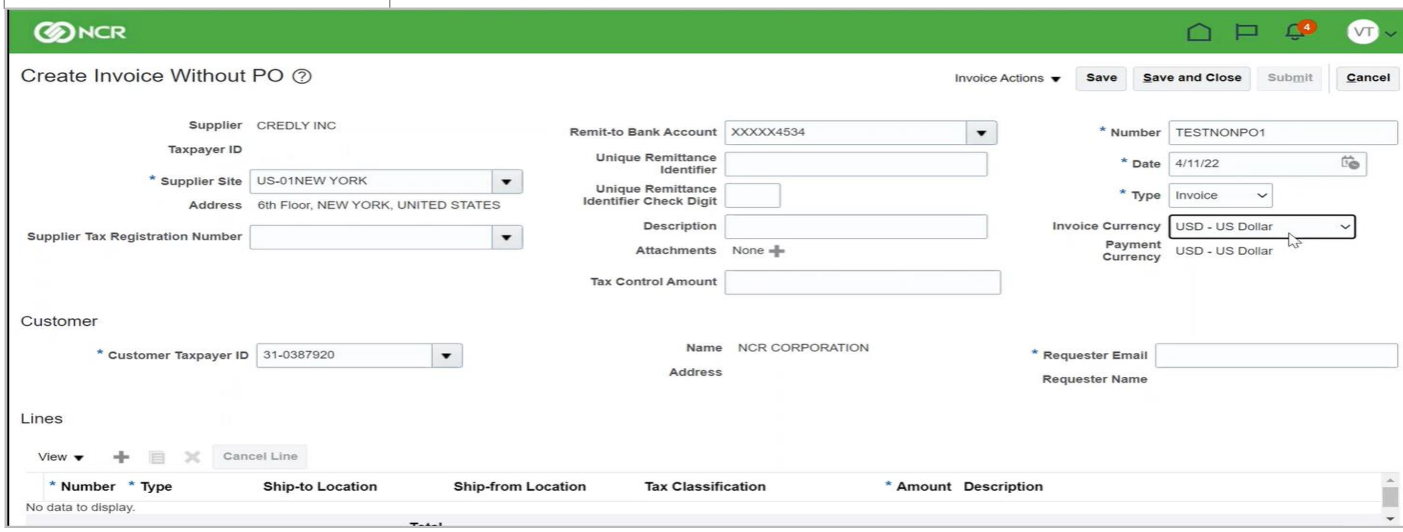
Process Step	Description
15	**Creating Invoice (PO Invoice)** **Select Invoice Actions: Save** or **Save and Close** to view later, **Submit** or **Cancel**.



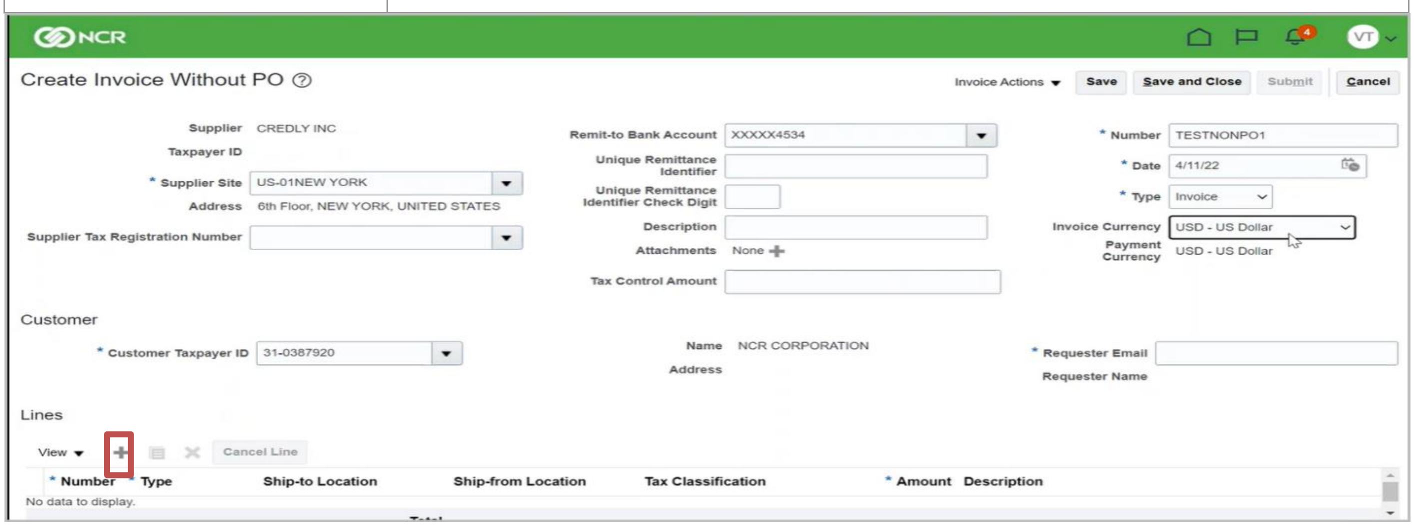
5. Creating Invoice without PO (Purchase Order)

Process Step	Description
1	**Creating Invoice without PO (Purchase Order)** On the Supplier Portal homepage, go to **Tasks** then down to **the Invoices and Payments section** then **click Create Invoice Without PO.**

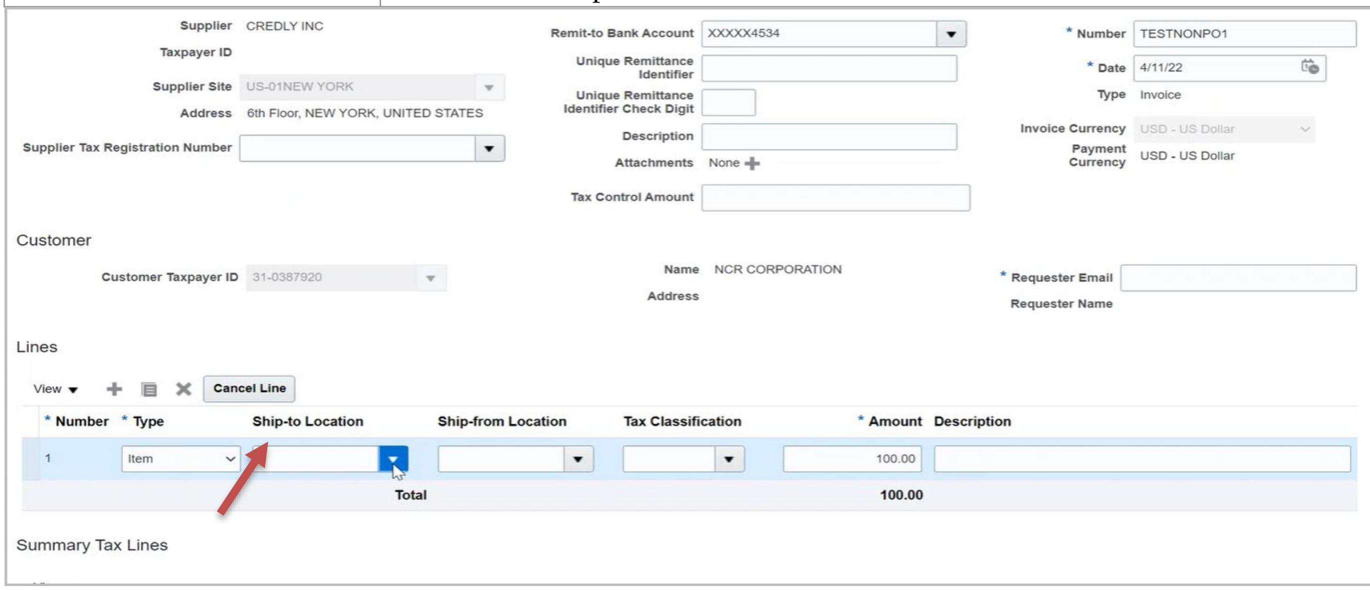
Process Step	Description
2	**Creating Invoice without PO (Purchase Order)** Enter the relevant information within the appropriate fields including required fields noted by asterisk (*). *A copy of the invoice is required as an **Attachment**.* *In the **Requestor Email** field, enter the NCR contact's email address (approver). i.e., firstname.lastname@ncr.com.*



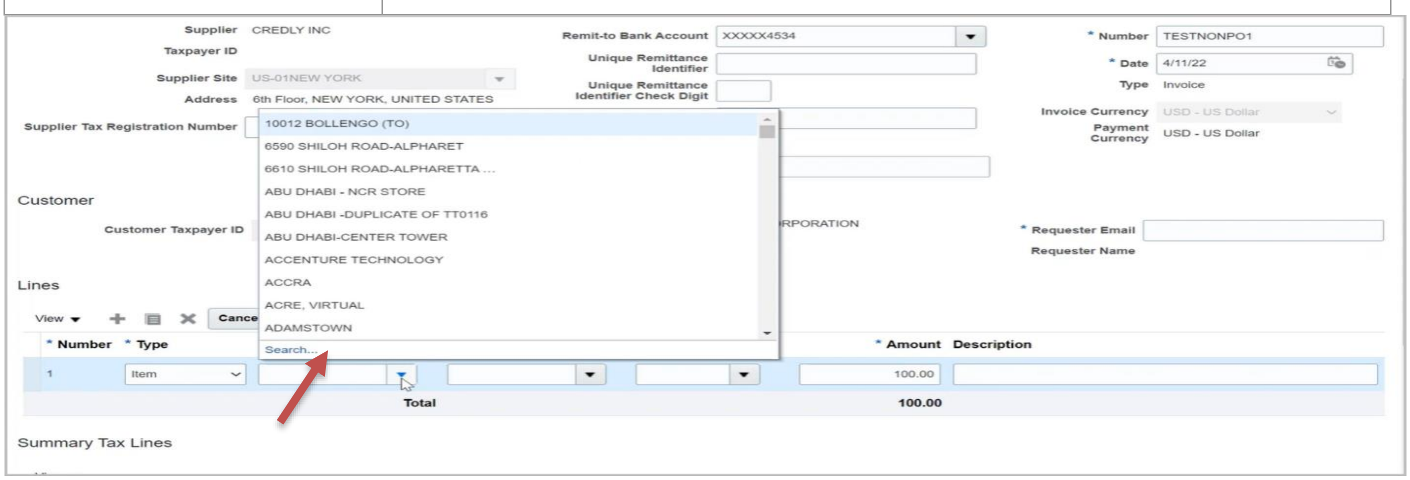
Process Step	Description
3	**Creating Invoice without PO (Purchase Order)** **Click "+"** to add line items in the **Lines** section. Enter the invoice detail lines.



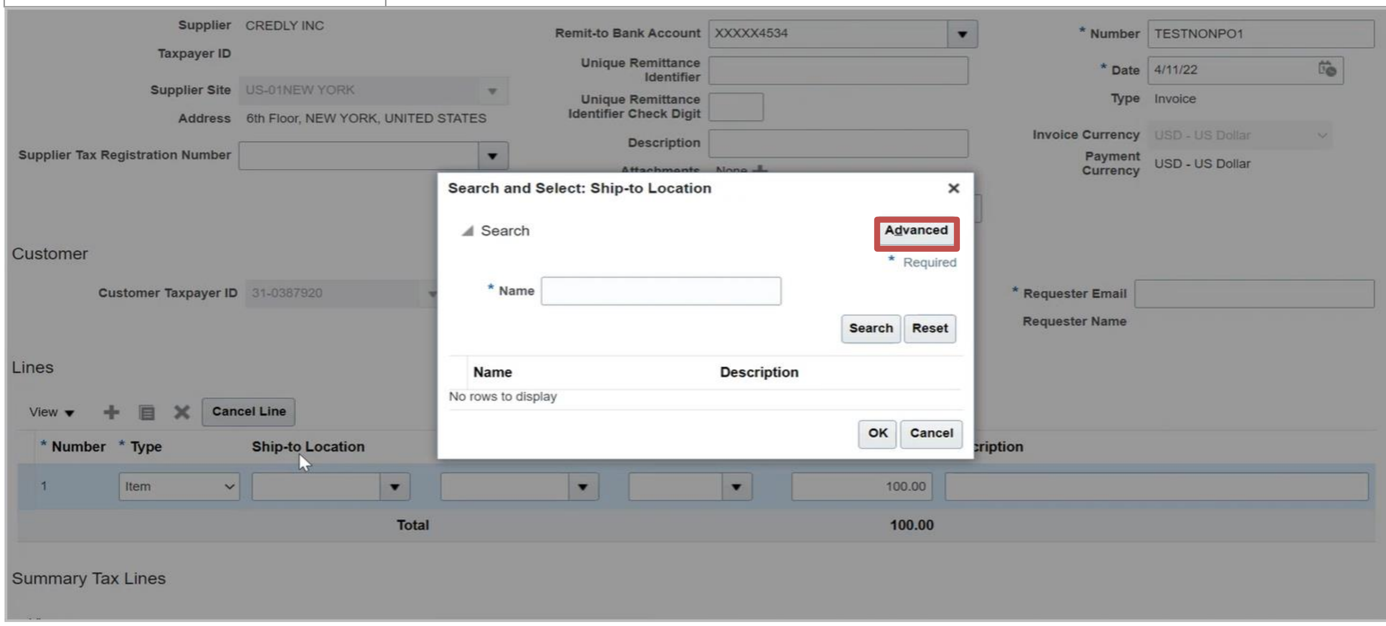
Process Step	Description
4	**Creating Invoice without PO (Purchase Order)** If tax is on the invoice**, click** the **Ship-to Location** dropdown to find the delivery location. If the invoice does not contain tax, go to Process Step 5.9. 💡 The Ship-to Location will determine the tax code.



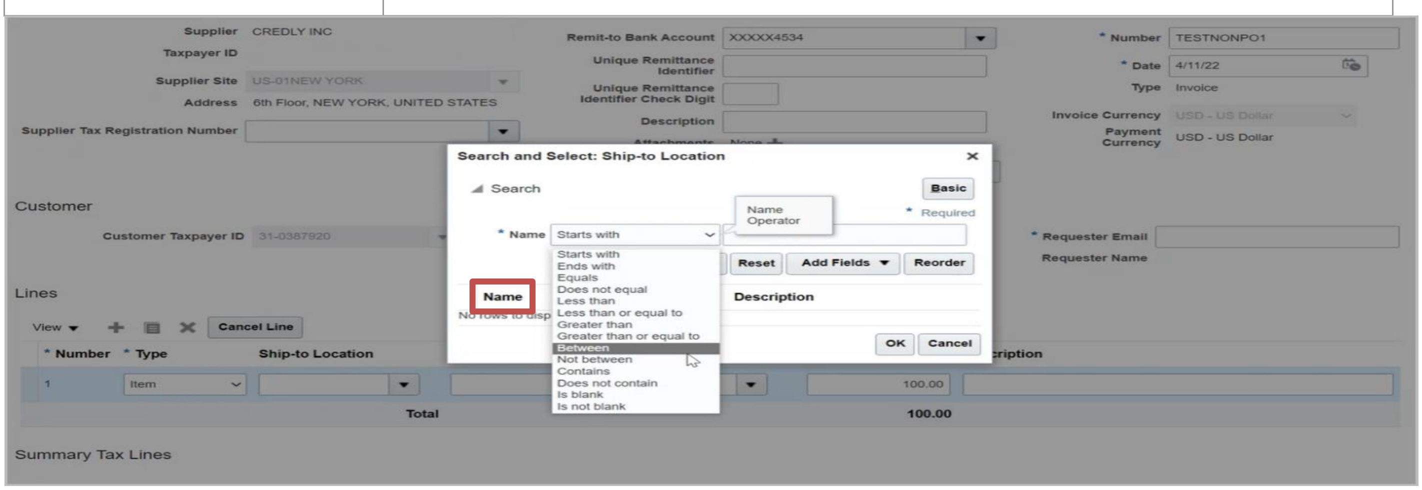
Process Step	Description
5	**Creating Invoice without PO (Purchase Order)** **Click** **Search** to find the location.



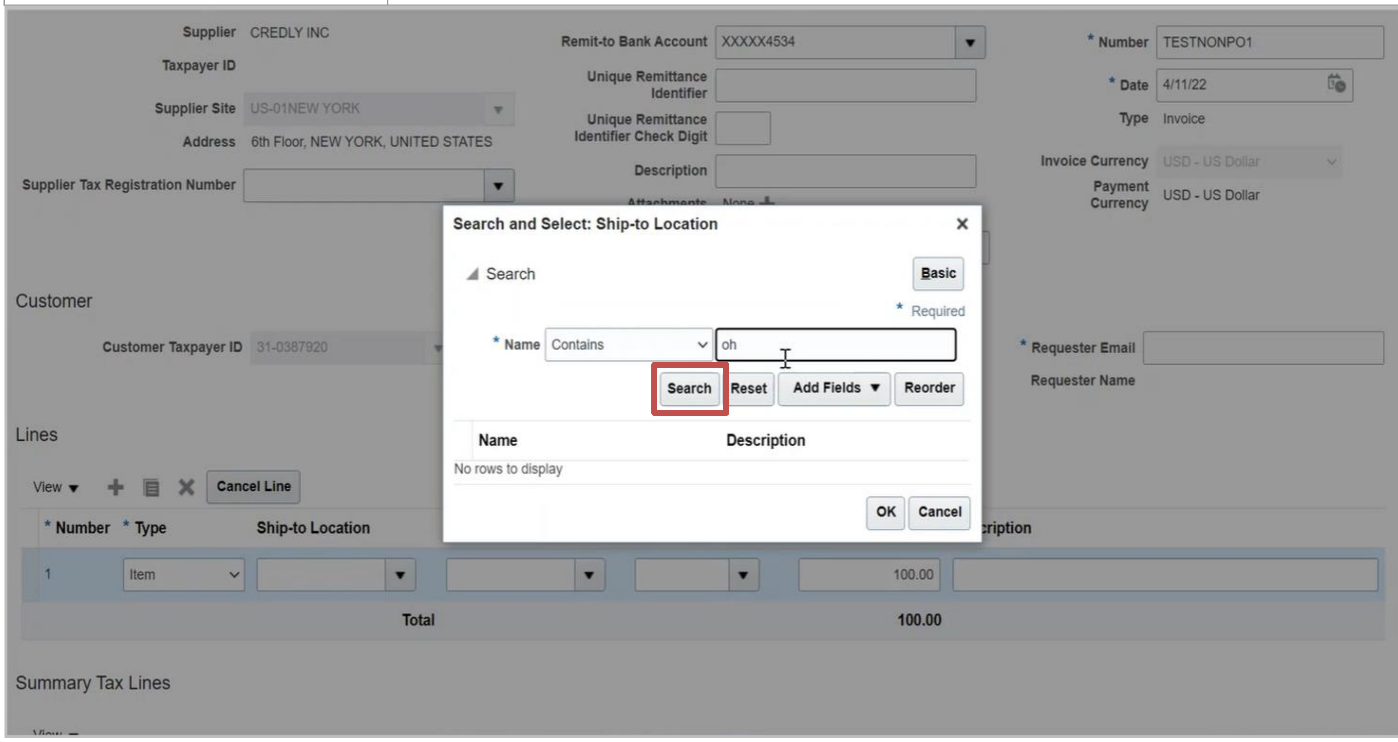
Process Step	Description
5.1	**Creating Invoice without PO (Purchase Order)** **Select** Advanced for additional search options.



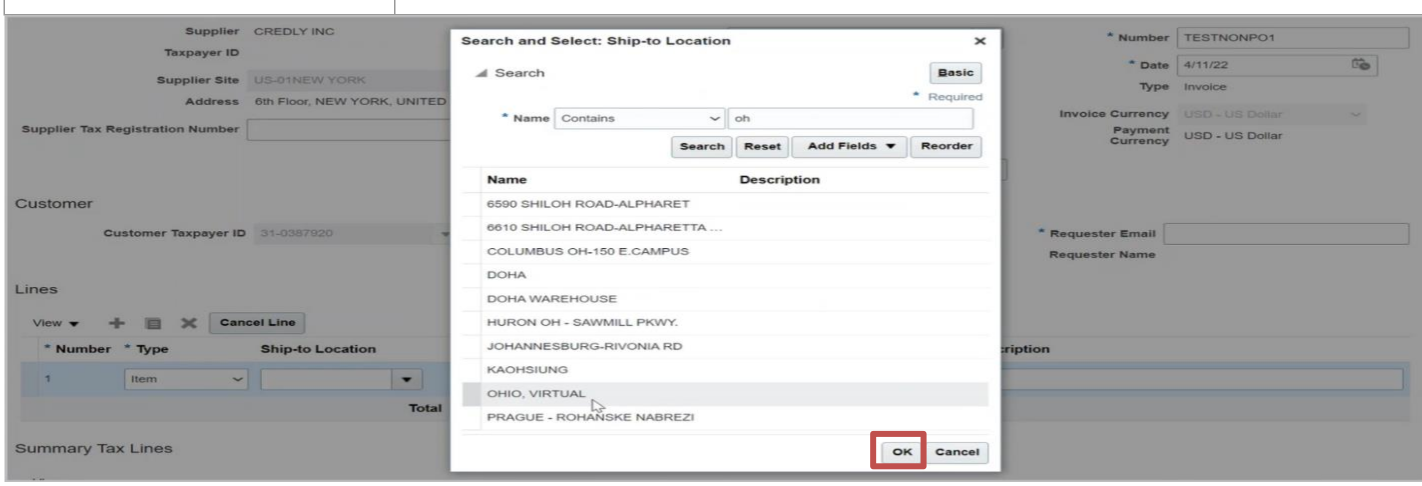
Process Step	Description
5.2	**Creating Invoice without PO (Purchase Order)** **Enter** the Name search criteria.



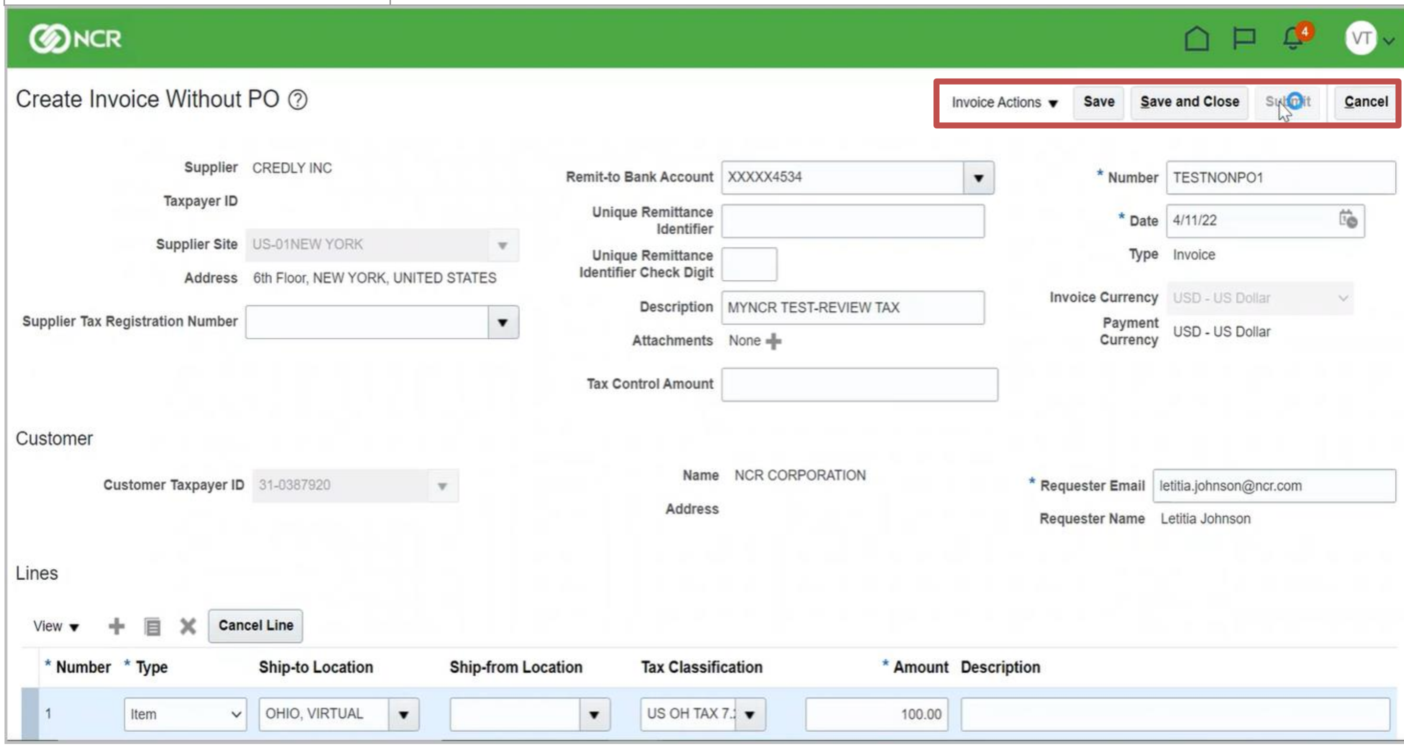
Process Step	Description
5.3	**Creating Invoice without PO (Purchase Order)** **Enter** the **search information** then **click Search**.



Process Step	Description
5.4	**Creating Invoice without PO (Purchase Order)** **Select** the location then **click OK**.



Process Step	Description
6	**Creating Invoice without PO (Purchase Order)** **Select Invoice Actions: Save** or **Save and Close** to view later, **Submit** or **Cancel**.



Process Step	Description
7	**Creating Invoice without PO (Purchase Order)** Once submitted, a confirmation will appear at the top of the screen.