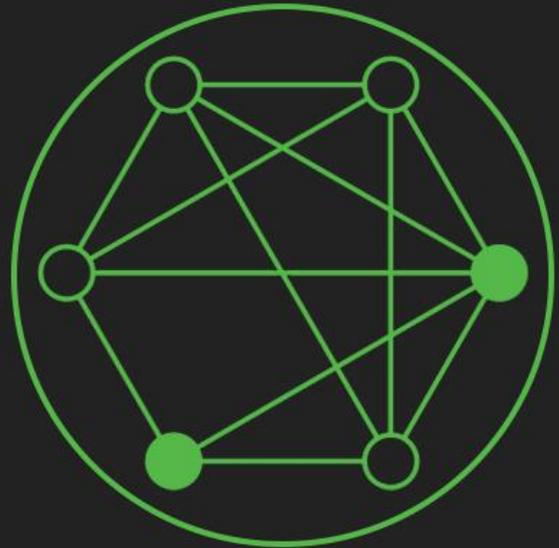




# JOB AID



## 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.

<b>Supplier Portal Roles</b>	
<b>Role</b>	<b>Description</b>
<b>Supplier Self Service Administrator</b>	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.
<b>Supplier Self Service Bank Account Maintenance</b>	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.
<b>Supplier Accounts Receivable Specialist</b>	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
<b>Supplier Self Service Account Manager</b>	Individual has view only access to the information available on the Supplier Portal.

## 2. Access to the NCR Supplier Portal

Process Step	Description
<b>1</b>	<p><b>Access to the Supplier Portal</b></p> <p>Users should access the Supplier Portal through the following web address - <a href="https://myncr.ncr.com">https://myncr.ncr.com</a></p> <p>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.</p>



SIGN IN

User Name

Password

Remember me

LOG IN

[Forgot Username](#)

[Forgot Password](#)

Don't have an account? [Register](#)

## Portal Screen Shots

## Registration



**Customers**

Access invoices and order history details  
Access NCR service applications or secured sites  
Create and manage other users from your company

[REGISTER](#)



### NCR Partners

For businesses interested in teaming up and becoming a NCR Partner

[Register](#)



### NCR Suppliers

For NCR Suppliers who are interested in NCR's iSupplier Portal for billing, payments or Service Parts Sourcing

[Register](#)



**Become an NCR Supplier**

Join our NCR family, and together we can make simple possible!



[Click here to go to the NCR Supplier Registration page.](#)  
Please register and become an NCR Supplier

[BECOME AN NCR SUPPLIER](#)

Process Step	Description
<p style="text-align: center;"><b>1.1</b></p>	<p><b>Access to the Supplier Portal</b></p> <p>Once registration to the supplier portal is completed on MyNCR, between one to two emails will be sent.</p> <ul style="list-style-type: none"> <li>The <b>first email</b> acknowledges receipt of the supplier registration application.</li> </ul> <p>Note: The registration expires in 30 days</p>

FYI: Supplier Contact User Account for NCR Corporation was Created

 ejbz-dev1.fa.sender@workflow.mail.us6.oraclecloud.com  
 To: Lewis, Angela  
 Retention Policy: 3 Year Delete (3 years)  
If there are problems with how this message is displayed, click here to view it in a web browser.

 Reply  
  Reply All  
  Forward  
  ...  
 Expires: 4/11/2025      Tue 4/12/2022 5:01 PM

**\*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	<p><b>Access to the Supplier Portal</b></p> <p>The <b>second email</b> is the <b>Welcome to MyNCR!</b> access email which contains a link to log into the Supplier Portal for the first time.</p> <ul style="list-style-type: none"> <li>For new supplier users, <b>click on Set up my account.</b></li> </ul> <p> The link expires in seven (7) days.</p>



Glad to Have You On Board!

Start enjoying an enriched NCR experience with your new account.

[Set up my account](#)

*This link will expire in 7 days.*

Hi Supplier,

Welcome to NCR! Please sign in to your account to complete registration.

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

Get started with your new account

ISup, please enter your password to create your new NCR account. Not You? [Login Here](#)

**Password Requirement**

- ✓ at least 8 characters
- ✓ one lower case character
- ✓ one upper case character
- ✓ one number or special character
- ✓ not be the username or name
- ✓ standard English characters only

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

Please review the user Terms of Service

Effective Date: June 08, 2022

"By clicking "I Agree" or by using the MyNCR Customer Portal "MyNCR", you agree to the terms and conditions of this User Agreement "Agreement". You further agree that this Agreement forms a legally binding contract between "you" and NCR Corporation "NCR", and that this Agreement constitutes a writing signed by you under applicable law. You represent that you have been authorized by NCR and your employer to access MyNCR. This Agreement is subject to change by NCR without prior notice (unless prior notice is required by law), by posting of the revised Agreement on the NCR website where you access and use MyNCR. Please carefully read these terms.

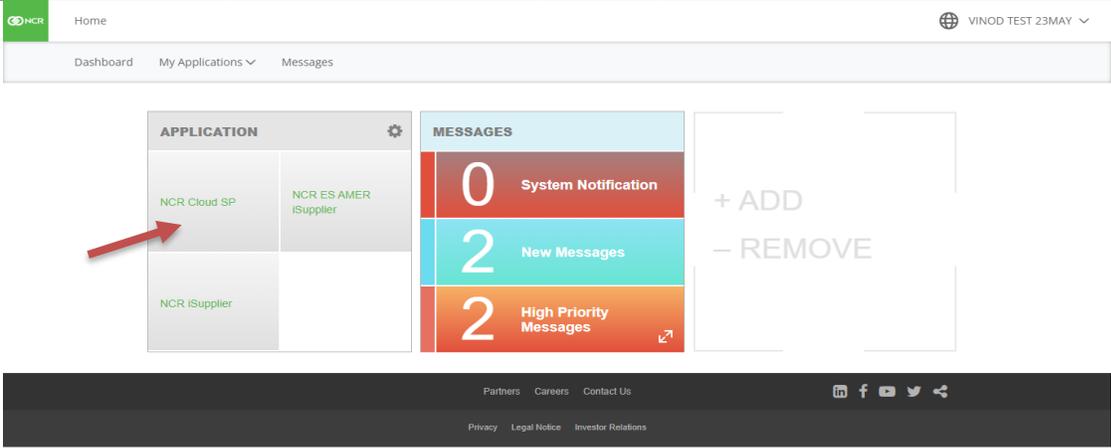
1. **Access to MyNCR**

1.1 In order to use MyNCR, you must have executed a legally binding agreement with NCR to purchase NCR products.

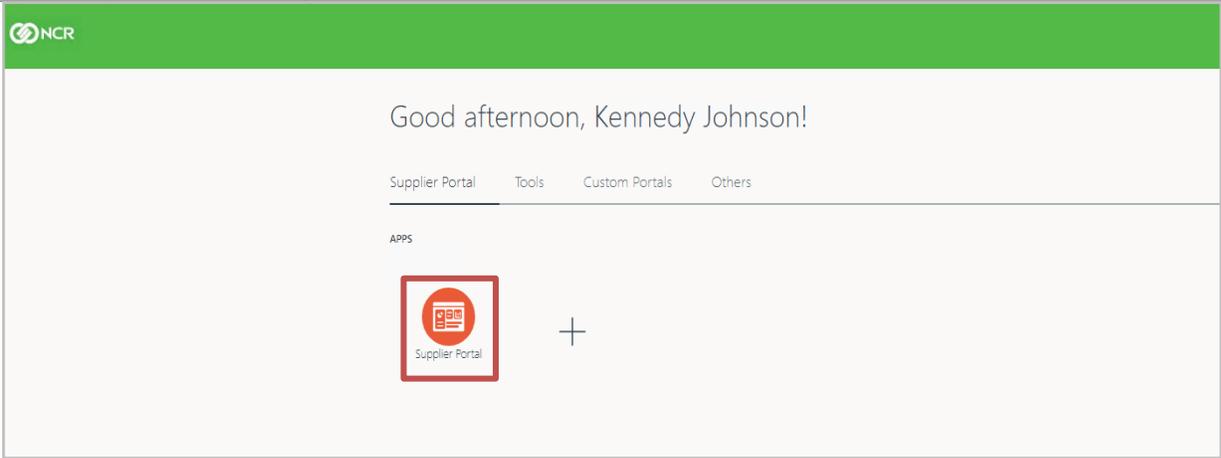
1.2 You agree to provide true, accurate, and complete registration information and to maintain and promptly update your information as applicable.

By choosing I Agree, you understand and agree to NCR's User Terms of Service & [Privacy Policy](#).

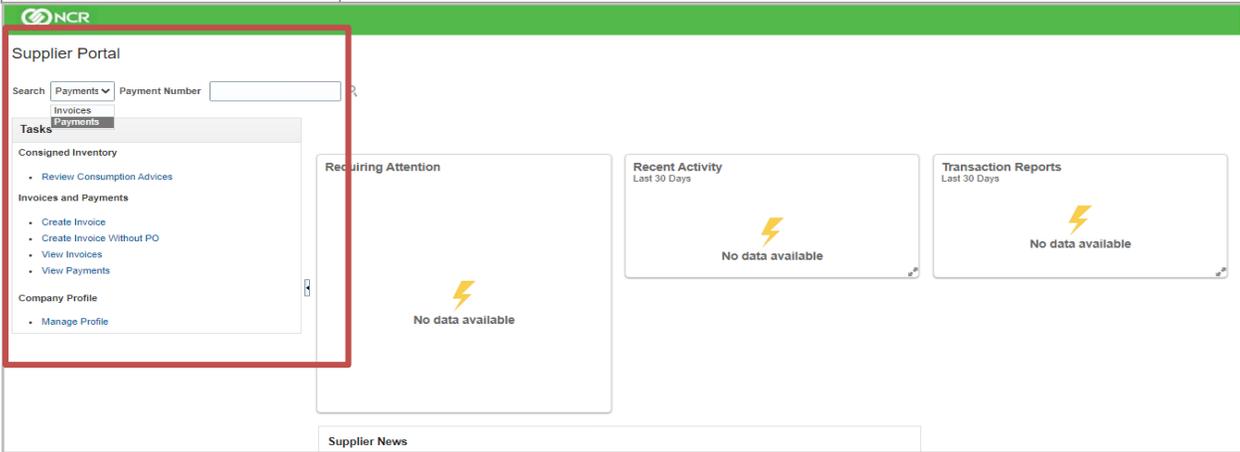
Process Step	Description
5	<p><b>Access to the Supplier Portal</b></p> <p>User will be redirected to the MyNCR Home Page.</p> <p>Select the <b>NCR Cloud SP</b> application to access the Supplier Portal.</p> <p>Note – The “NCR Cloud SP” application will be available for most portal users to access Oracle Cloud.</p> <ul style="list-style-type: none"> <li>• New users will only see “NCR Cloud SP”</li> <li>• Existing users will view existing applications that they had access to in the previous portal.</li> </ul>



Process Step	Description
6	<p><b>Access to the Supplier Portal</b></p> <p>Click on the <b>Supplier Portal</b> icon</p>



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



### 3. Managing Profiles

Process Step	Description
1	<p><b>Manage Profile</b></p> <p>Go to <b>Company Profile</b> at the bottom of the list of <b>Tasks</b>. <b>Select Manage Profile</b> 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.</p>

### 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
<b>2</b>	<p><b>Adding a New User</b></p> <p>The Company Profile screen tool bar list the options available to a user. Click <b>Contacts</b> to add a new user.</p>

Edit Profile Change Request: 17001 Delete Change Request Review Changes Save Save and Close Cancel

Change Description

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

**General**  
 \* Supplier Name SHABAKA COMMUNITY CONCIERGE Tax Organization Type Corporation  
 Supplier Number 241847 Status Active  
 Supplier Type Supplier Attachments None

**Identification**  
 D-U-N-S Number  National Insurance Number   
 Customer Number  Corporate Web Site   
 SIC

**Corporate Profile**  
 Year Established  Chief Executive Title   
 Mission Statement  Chief Executive Name   
 Year Incorporated  Principal Title   
 Principal Name

Process Step	Description
<b>2.1</b>	<p><b>Adding a New User</b></p> <p>The following profile change warning message may appear. Click <b>Yes</b> to continue.</p>

Last Change Request 13003 Requested By AL TAHER, NOUMAN Change Description  
 Request Status Canceled Request Date 6/7/22

Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Status Active Freeze Detach Wrap

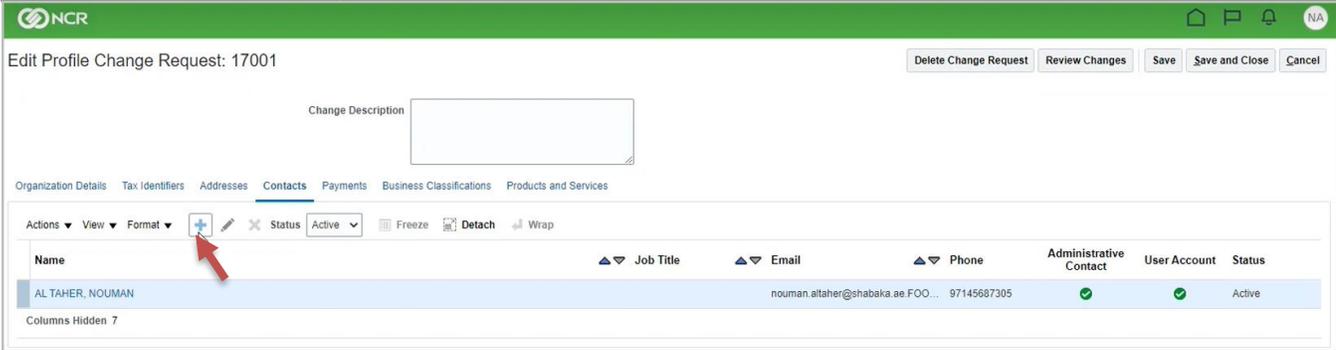
**Warning**

POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?

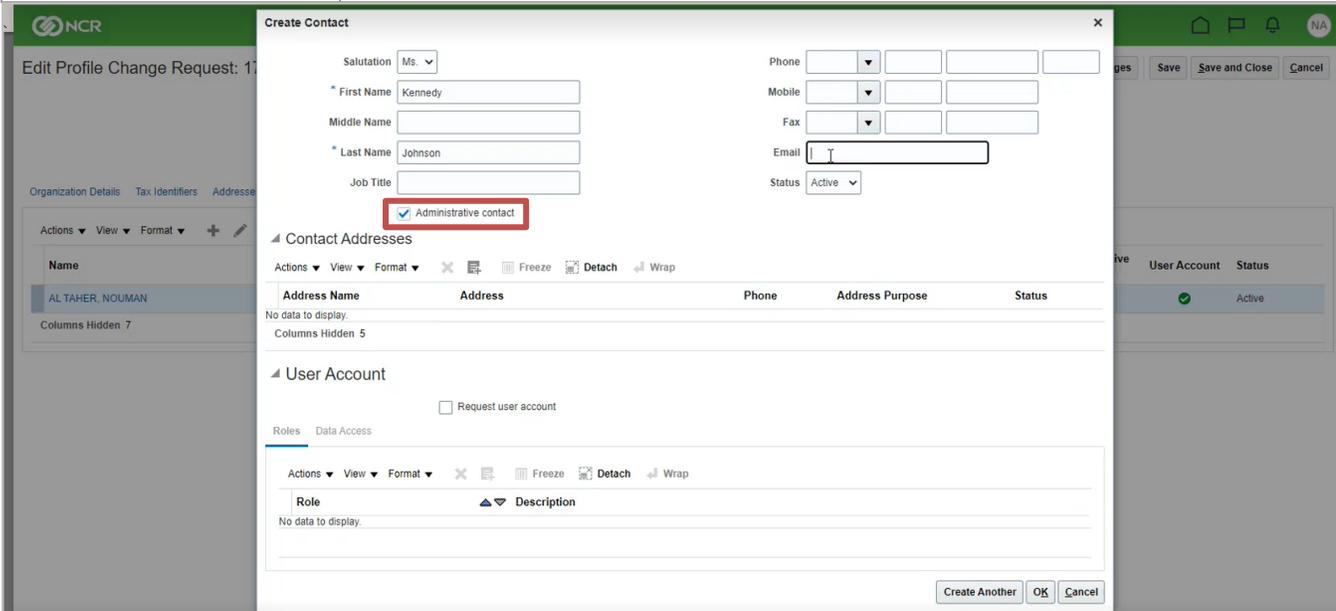
Yes No

Phone	Administrative Contact
FOO... 97145687305	✓

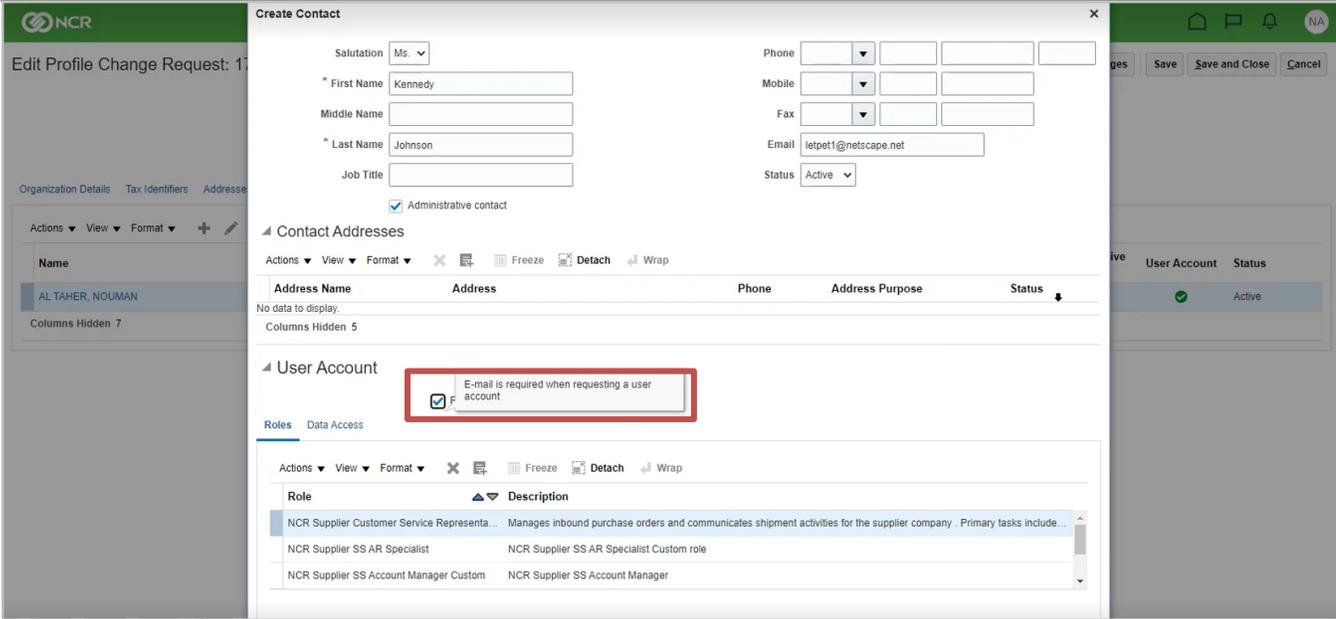
Process Step	Description
2.2	<b>Adding a New User</b> Click <b>Contacts</b> then the plus “+” icon to add a contact.



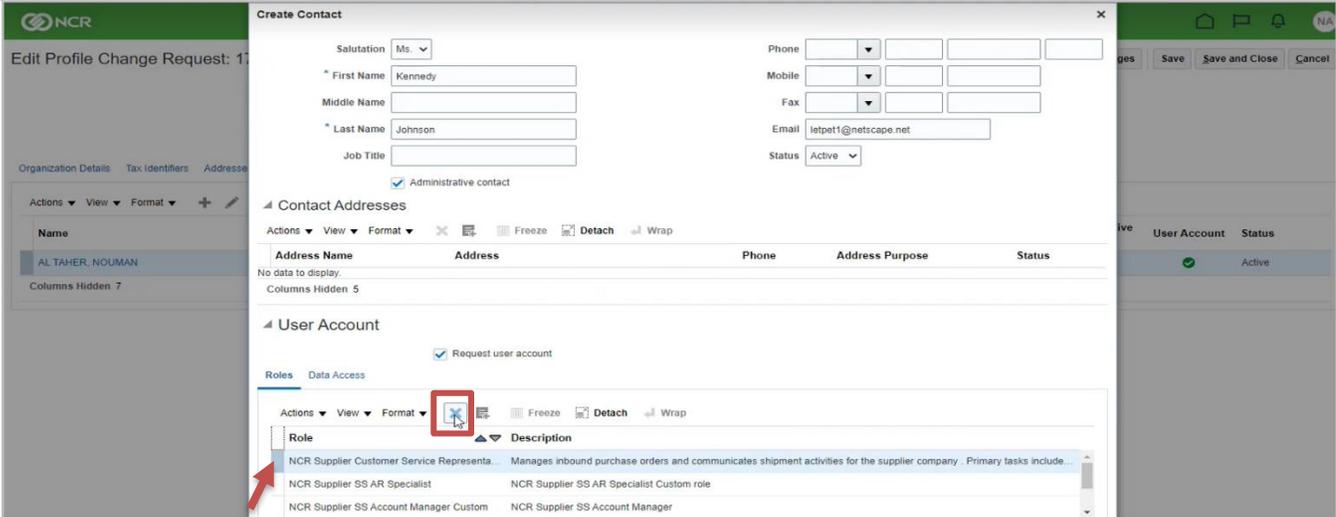
Process Step	Description
2.3	<b>Adding a New User</b> The Create Contact window will pop-up. <b>Update the appropriate fields</b> including required fields noted by an asterisk (*). <b>Click the Administrative Contact</b> box. <b>Update Contact Addresses</b> details if needed. <i><b>A unique email address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



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



Process Step	Description
<b>2.5</b>	<b>Adding a New User</b> The listing of available roles will appear. Select the best <b>Role</b> 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	<b>Adding a New User</b> Select <b>Create Another</b> to add another user, <b>OK</b> to proceed with adding the user or <b>Cancel</b> to start over.

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

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
AL TAHER, NOUMAN		nouman.altaher@shabaka.ae.FOO...	97145687305	✓	✓	Active
Johnson, Kennedy		letpet1@netscape.net		✓		Active

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

Review Changes

Change Description

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Johnson, Kennedy		lelpet1@netscape.net		✓		Active	

Columns Hidden 7

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

Company Profile

Cancel Change Request Edit Done

There is a profile change request pending approval. You may edit to make additional changes.

Last Change Request 17001 Requested By AL TAHER, NOUMAN Change Description  
 Request Status Pending Approval Request Date 6/8/22

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Confirmation  
 Your profile change request 17001 was submitted for approval.  
 OK

Name	Phone	Administrative Contact	User Account	Status
AL TAHER, NOUMAN	her@habaka.ae.FOO... 97145687305	✓	✓	Active

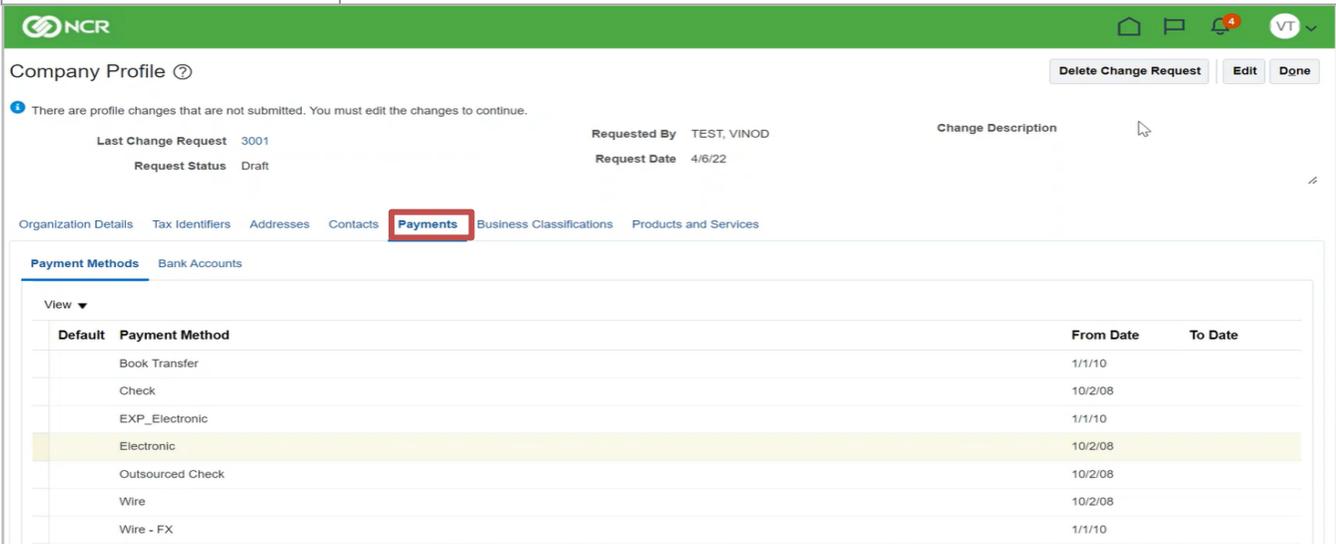
Columns Hidden 7

Process Step	Description
<b>2.10</b>	<p><b>Adding a New User</b></p> <p>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).</p> <p>Go to <b>Manage Profile</b> then <b>click Contacts</b>. A <b>check mark</b> will appear in the <b>User Account</b> section of the user's profile to confirm the user's active status.</p>



### 3.2 Updating Payments and Banking

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



Process Step	Description
3.1	<b>Selecting the Payment Methods</b> Click the right mark icon to select the Payment Method.

Change Description

Payments

Payment Methods Bank Accounts

Actions View Format + Freeze Detach Wrap

Default	Payment Method	From Date	To Date
<input checked="" type="checkbox"/>	Electronic	10/2/08	m/d/yy
<input type="checkbox"/>	BFAY	10/2/08	m/d/yy
<input type="checkbox"/>	Book Transfer	1/1/10	m/d/yy
<input type="checkbox"/>	Check	10/2/08	m/d/yy
<input type="checkbox"/>	EXP_Electronic	1/1/10	m/d/yy
<input type="checkbox"/>	Outsourced Check	10/2/08	m/d/yy

Process Step	Description
3.2	<b>Adding Bank Accounts</b> Select the Bank Accounts tab. Click “+” to create a new bank account. 💡 Bank Accounts can be edited with the pencil icon ✎.

Change Description

Payments

Payment Methods Bank Accounts

Actions View Format + Freeze Wrap

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	XXXXXXXX8888		EUR	BANQUE DU BAT ET DES TR...

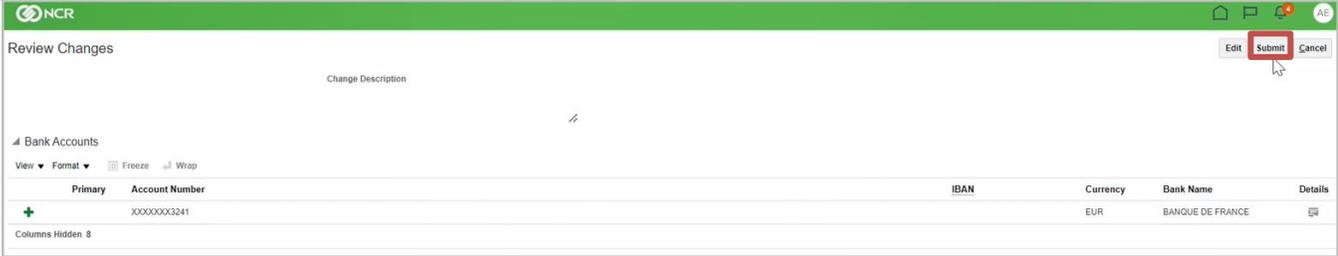
Columns Hidden 8

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

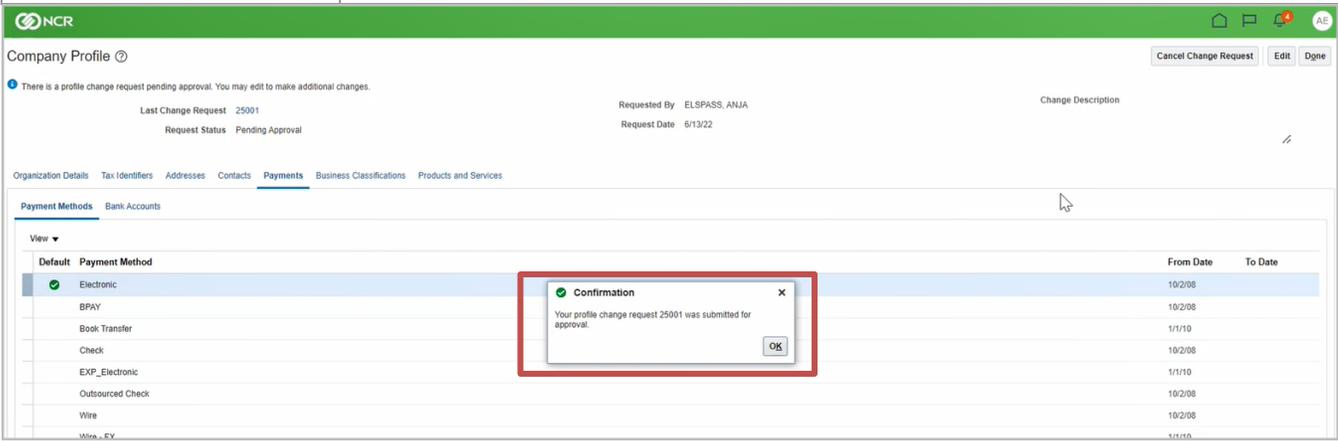
Process Step	Description
<b>3.4</b>	<b>Adding Bank Accounts</b> Click <b>Review Changes</b> to submit the new bank account.

Primary	Account Number	IBAN	Currency	Bank Name
	XXXXXXXX3241		EUR	BANQUE DE FRANCE
✓	XXXXXXXX8888		EUR	BANQUE DU BAT ET DES TR...

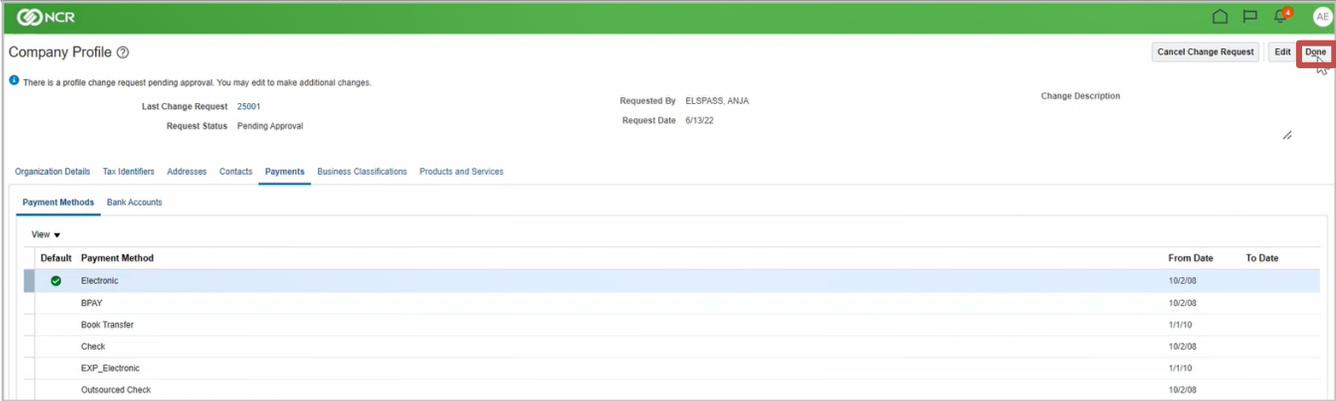
Process Step	Description
3.5	<b>Adding Bank Accounts</b> Click <b>Submit</b> to add the bank account.



Process Step	Description
3.6	<b>Adding Bank Accounts</b> The <b>Confirmation</b> 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 <b>OK</b> to close the window.

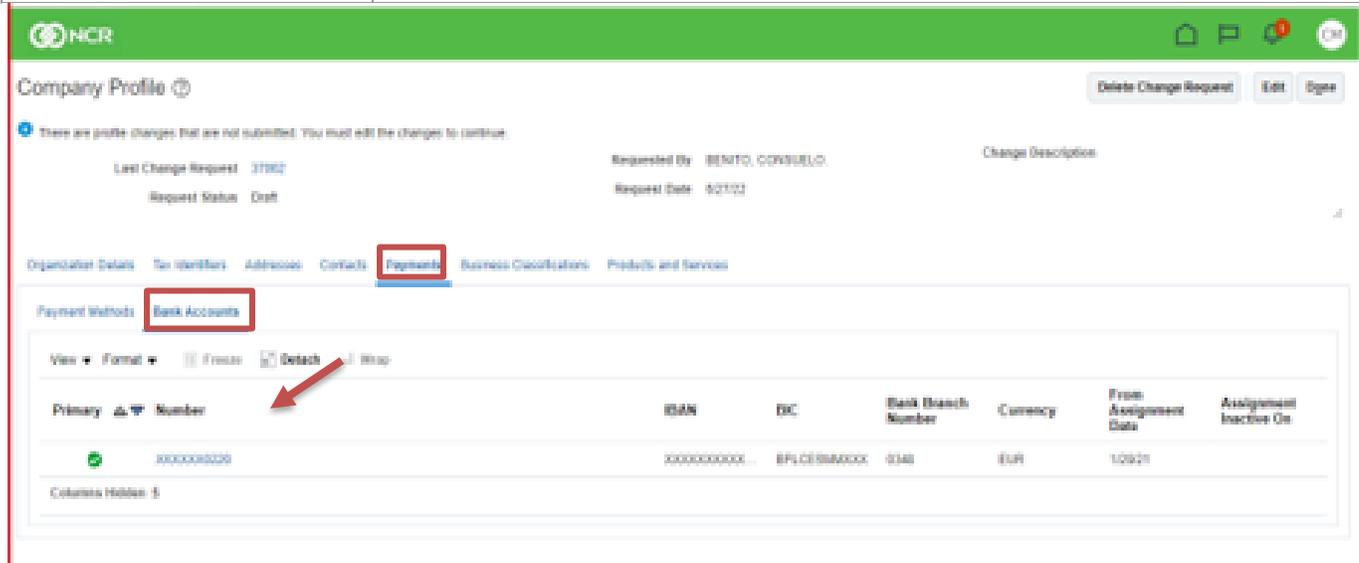


Process Step	Description
3.7	Adding Bank Accounts Click <b>Done</b> to close the window.

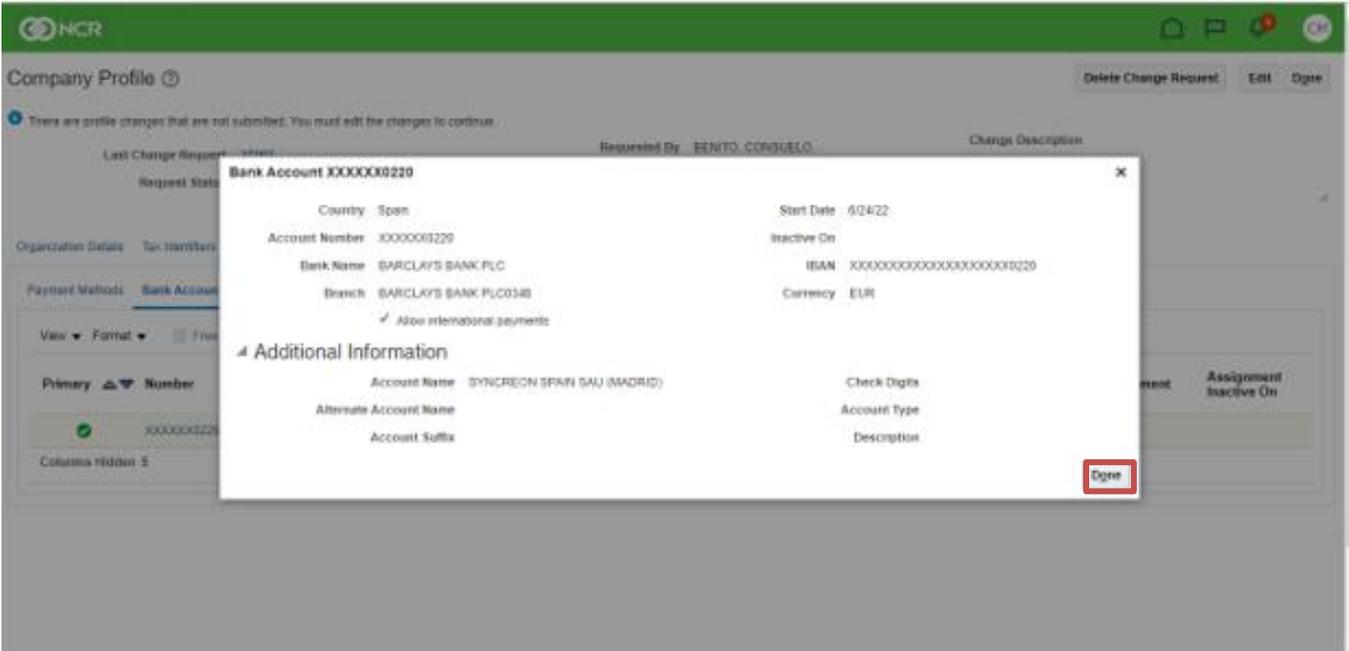


### 3.3 Viewing & Verifying Banking Details

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



Process Step	Description
<p style="text-align: center;"><b>4.1</b></p>	<p><b>Viewing &amp; Verifying Banking Details</b></p> <p><b>Click</b> on the truncated Bank Account Number hyperlink to view the various bank details in the popup.</p> <p><b>Click Done</b> to close the Bank Account window.</p>



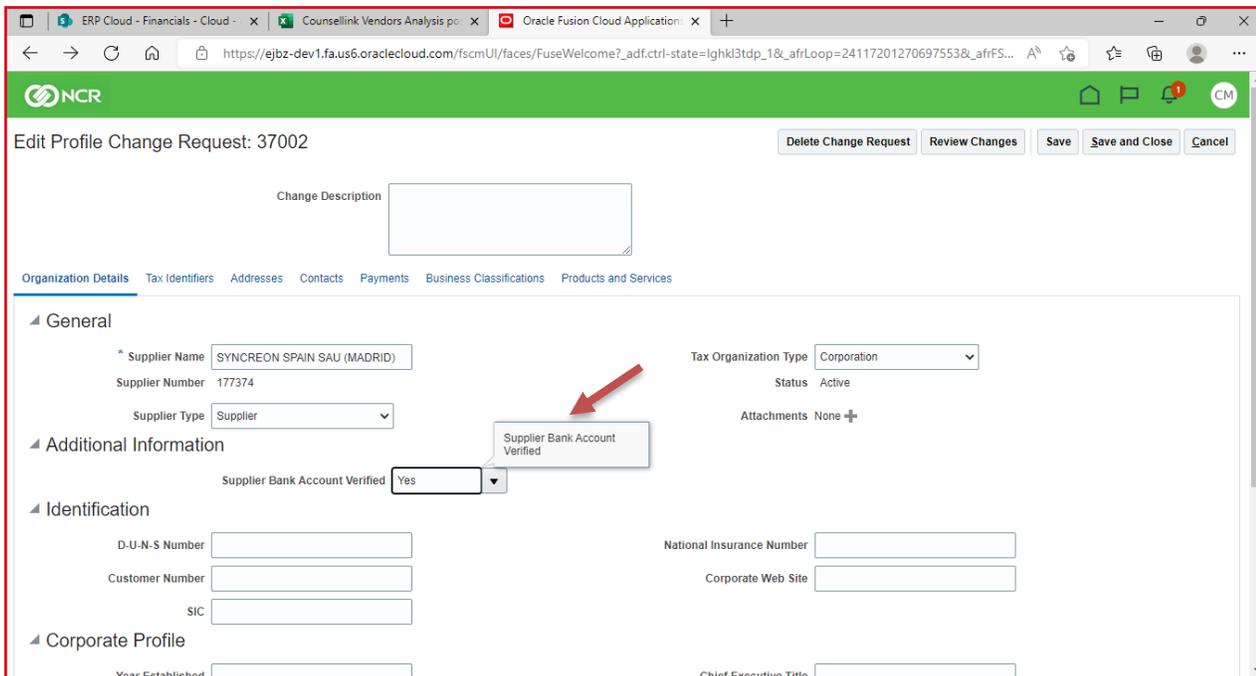
Process Step	Description
4.2	<p><b>Viewing &amp; Verifying Banking Details</b></p> <p><b>IMPORTANT: In order for a payment to be issued to your company from Oracle Cloud for the first time, you must perform the following verification steps. Otherwise, your payments will be placed on hold.</b></p> <p>On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

The screenshot shows the Oracle Cloud Supplier Portal interface. At the top, there are navigation tabs: "Delete Change Request", "Edit" (highlighted with a red box), and "Done". Below this, a message states: "There are profile changes that are not submitted. You must edit the changes to continue." The page displays details for a company profile, including "Last Change Request" (37002), "Request Status" (Draft), "Requested By" (BENITO, CONSUELO), and "Request Date" (6/27/22). A horizontal menu below the message includes "Organization Details" (highlighted with a red box), "Tax Identifiers", "Addresses", "Contacts", "Payments", "Business Classifications", and "Products and Services". The main content area is divided into sections: "General" (Company: SYNCREON SPAIN SAU (MADRID), Supplier Number: 177374, Supplier Type: Supplier, Tax Organization Type: Corporation, Status: Active, Attachments: None), "Identification" (D-U-N-S Number, Customer Number, SIC, National Insurance Number, Corporate Web Site), and "Corporate Profile" (Year Established, Mission Statement, Chief Executive Title, Chief Executive Name, Principal Title, Principal Name).

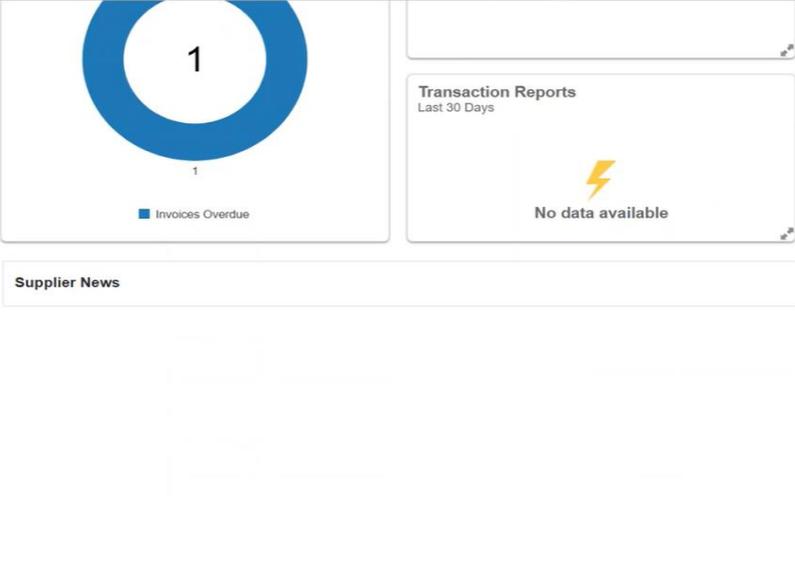
Process Step	Description
<p><b>4.3</b></p>	<p><b>Viewing &amp; Verifying Banking Details</b></p> <p>After all the banking and tax details have been confirmed, select <b>Yes</b> in the <b>Supplier Bank Account Verified</b> flag drop-down menu within the <b>Additional Information</b> section.</p> <p><b>REMINDER:</b> 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.</p>

The screenshot shows the NCR system interface for editing a profile change request (ID: 37002). The interface includes a header with the NCR logo and navigation icons. Below the header, there are buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. A 'Change Description' text area is present. The main content area is divided into several sections: 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'General' section contains fields for 'Supplier Name' (SYNCREON SPAIN SAJ (MADRID)), 'Supplier Number' (177374), 'Supplier Type' (Supplier), 'Tax Organization Type' (Corporation), 'Status' (Active), and 'Attachments' (None). The 'Additional Information' section is highlighted with a red box, and a red arrow points to the 'Supplier Bank Account Verified' dropdown menu, which is currently set to 'Yes'. The 'Identification' section contains fields for 'D-U-N-S Number', 'Customer Number', 'SIC', 'National Insurance Number', and 'Corporate Web Site'. The 'Corporate Profile' section is partially visible at the bottom.

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



## 4. Creating Invoice (Purchase Order Invoice)

Process Step	Description
<p style="text-align: center;"><b>1</b></p>	<p><b>Creating Invoice (PO Invoice)</b></p> <p>On the Supplier Portal homepage, go to <b>Tasks</b> then down to the <b>Invoices and Payments</b> section. Select <b>Create Invoice</b>.</p>
<ul style="list-style-type: none"> <li>• Manage Agreements</li> <li><b>Channel Programs</b></li> <li>• Manage Programs</li> <li><b>Shipments</b></li> <li>• Manage Shipments</li> <li>• Create ASN</li> <li>• Create ASBN</li> <li>• Upload ASN or ASBN</li> <li>• View Receipts</li> <li>• View Returns</li> <li><b>Consigned Inventory</b></li> <li>• Review Consumption Advices</li> <li>• Review Consigned Inventory</li> <li>• Review Consigned Inventory Transactions</li> <li><b>Invoices and Payments</b></li> <li>• Create Invoice</li> <li>• Create Invoice Without PO</li> <li>• View Invoices</li> <li>• View Payments</li> <li><b>Negotiations</b></li> <li>• View Active Negotiations</li> <li>• Manage Responses</li> </ul>	

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

**Create Invoice** ? Invoice Actions Save Save and Close Submit Cancel

\* Identifying PO  Remit-to Bank Account

Supplier 2011780357 KJB INTEGRATED SOLUTIONS LLC US-01COLUMBUS

Taxpayer ID Search...

\* Supplier Site  Identifier Check Digit

Address  Description

Supplier Tax Registration Number  Attachments None +

Tax Control Amount

\* Number

\* Date m/d/yy

\* Type Invoice

Invoice Currency

Payment Currency

Customer

Customer Taxpayer ID  Name

Address

Lines

View + X Cancel Line

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classifica
		* Number	* Line	* Schedule	Number	Line				
No data to display.										

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

**Create Invoice** ? Invoice Actions Save Save and Close Submit Cancel

\* Identifying PO 2011780357 Remit-to Bank Account

Supplier KJB INTEGRATED SOLUTIONS LLC

Taxpayer ID

\* Supplier Site US-01COLUMBUS

Address 328 BROWNSFELL DRIVE, COLUMBUS, OH 43235

Supplier Tax Registration Number

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

Attachments None +

Tax Control Amount

\* Number

\* Date m/d/yy

\* Type Invoice

Invoice Currency USD - US Dollar

Payment Currency USD - US Dollar

Customer

\* Customer Taxpayer ID 31-0387920 Name NCR CORPORATION

Address

Lines

View + X Cancel Line

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classifica
		* Number	* Line	* Schedule	Number	Line				
No data to display.										

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

**NCR** Home | Notifications (3) | KJ

Create Invoice ? Invoice Actions | Save | Save and Close | Submit | Cancel

\* Identifying PO: 2011780357  
 Supplier: KJB INTEGRATED SOLUTIONS LLC  
 Taxpayer ID:   
 \* Supplier Site: US-01COLUMBUS  
 Address: 328 BROWNSFELL DRIVE, COLUMBUS, OH 43235  
 Supplier Tax Registration Number:   
 Remit-to Bank Account:    
 Unique Remittance Identifier:   
 Unique Remittance Identifier Check Digit:   
 Description:   
 Attachments: None +   
 Tax Control Amount:   
 \* Number:   
 Date: m/d/yy   
 \* Type: Invoice   
 Invoice Currency: USD - US Dollar  
 Payment Currency: USD - US Dollar

Customer

\* Customer Taxpayer ID: 31-0387920      Name: NCR CORPORATION  
 Address:

Lines

View + × ☰ Cancel Line

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classifica
		* Number	* Line	* Schedule	Number	Line				
No data to display.										

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

**NCR** Home, Notifications (3), User: KJ

Create Invoice ⓘ Invoice Actions Save Save and Close Submit Cancel

\* Identifying PO: 2011780357  
 Supplier: KJB INTEGRATED SOLUTIONS LLC  
 Taxpayer ID:   
 \* Supplier Site: US-01COLUMBUS  
 Address: 328 BROWNSFELL DRIVE, COLUMBUS, OH 43235  
 Supplier Tax Registration Number:   
 Remit-to Bank Account: XXXXX2502  
 Unique Remittance Identifier:   
 Unique Remittance Identifier Check Digit:   
 Description: SUPPLIER PORTAL-PO  
 Attachments: None +  
 Tax Control Amount:   
 \* Number: TESTPO1  
 \* Date: 4/11/22  
 \* Type: Invoice (dropdown menu open showing Credit memo, Invoice, Retainage release)  
 Invoice Currency:   
 Payment Currency:   
 Customer Taxpayer ID: 31-0387920  
 Name: NCR CORPORATION  
 Address:   
 Lines: View + - Cancel Line  

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification
		* Number	* Line	* Schedule	Number	Line				
No data to display.										

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

Taxpayer ID:   
 Supplier Site: US-01COLUMBUS  
 Address: 328 BROWNSFELL DRIVE, COLUMBUS, OH 43235  
 Supplier Tax Registration Number:   
 Identifier:   
 Unique Remittance Identifier Check Digit:   
 Description: SUPPLIER PORTAL-PO  
 Attachments: None +  
 Tax Control Amount:   
 Date: 4/11/22  
 Type: Invoice  
 Invoice Currency: USD - US Dollar  
 Payment Currency: USD - US Dollar  
 Customer Taxpayer ID: 31-0387920  
 Name: NCR CORPORATION  
 Address:   
 Lines: View + -  Cancel Line  

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification
		* Number	* Line	* Schedule	Number	Line				
1	Freight									
Total										

Process Step	Description
<b>7</b>	<b>Creating Invoice (PO Invoice)</b> Click the PO <b>Number</b> to view the PO.

The screenshot shows a software interface with a modal dialog box titled "Select and Add: Purchase Orders". The dialog box has a "Search Results" section with a table. The table has columns for "Purchase Order", "Consumption Advice", "Supplier Item Number", "Item Description", "Ship-to Location", and "Ordered". A single row is visible in the table with the following data:

Purchase Order			Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Ordered
Number	Line	Schedule	Number	Line				
2011780357	1	1				KJB Q4 deliverable...	NCR US 800	19,500.00

The background interface shows fields for "Taxpayer ID", "Supplier Site" (US-01COLUMBUS), "Address" (328 BROWNSFELL DRIVE, COLUMBUS, OH 43235), "Identifier", "Unique Remittance Identifier Check Digit", "Description" (SUPPLIER PORTAL-PO), "Attachments" (None), "Date" (4/11/22), "Type" (Invoice), "Invoice Currency" (USD - US Dollar), and "Payment Currency" (USD - US Dollar). There are also sections for "Customer", "Lines", and "Summary Tax Lines".

Process Step	Description
8	<b>Creating Invoice (PO Invoice)</b> The PO details will pop up on the screen.

Process Step	Description
9	<b>Creating Invoice (PO Invoice)</b> Select the <b>PO</b> , then Click <b>OK</b> to close the PO window.

Process Step	Description
10	<b>Creating Invoice (PO Invoice)</b> Click <b>Apply</b> to select the PO then <b>OK</b> to close the PO window.

The screenshot shows a software interface with a dialog box titled "Select and Add: Purchase Orders". The dialog box has a "Search Results" section with a table. The table has columns: Purchase Order Number, Line, Schedule, Consumption Advice Line, Supplier Item Number, Item Description, Ship-to Location, Ordered, and Receive. One row is highlighted in blue, showing Purchase Order Number 2011780357, Line 1, Schedule 1, Supplier Item Number, Item Description "KJB Q4 deliverable...", Ship-to Location "NCR US 800", Ordered 19,500.00, and Receive 19,500.00. At the bottom of the dialog box, there are three buttons: "Apply", "OK", and "Cancel". The "Apply" button is highlighted with a red box.

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

The screenshot shows a software interface with a table of purchase order lines. The table has columns: Line, Supplier Item, Item Description, Ship-to Location, Tax Classification, Available Quantity, Quantity, Unit Price, UOM, and \* Amount. One row is highlighted in blue, showing Item Description "KJB Q4 deliverables per att...", Ship-to Location "NCR US 800", and \* Amount 19,500.00. Two red arrows point to the "Quantity" and "\* Amount" columns of this row, indicating where adjustments can be made.

Process Step	Description
<b>11.1</b>	<b>Creating Invoice (PO Invoice)</b> Example of partial invoice application. Applying \$200 of \$19,500 PO (Purchase Order).

Customer Taxpayer [REDACTED] 87920      Name: [REDACTED]      Address:

Lines

View ▾ + × [Cancel Line]

Consumption Advice	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount
		KJB Q4 deliverables per att...	NCR US 800 ▾	▾					200.00
									200.00

Summary Tax Lines

View ▾

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount
No data to display.								

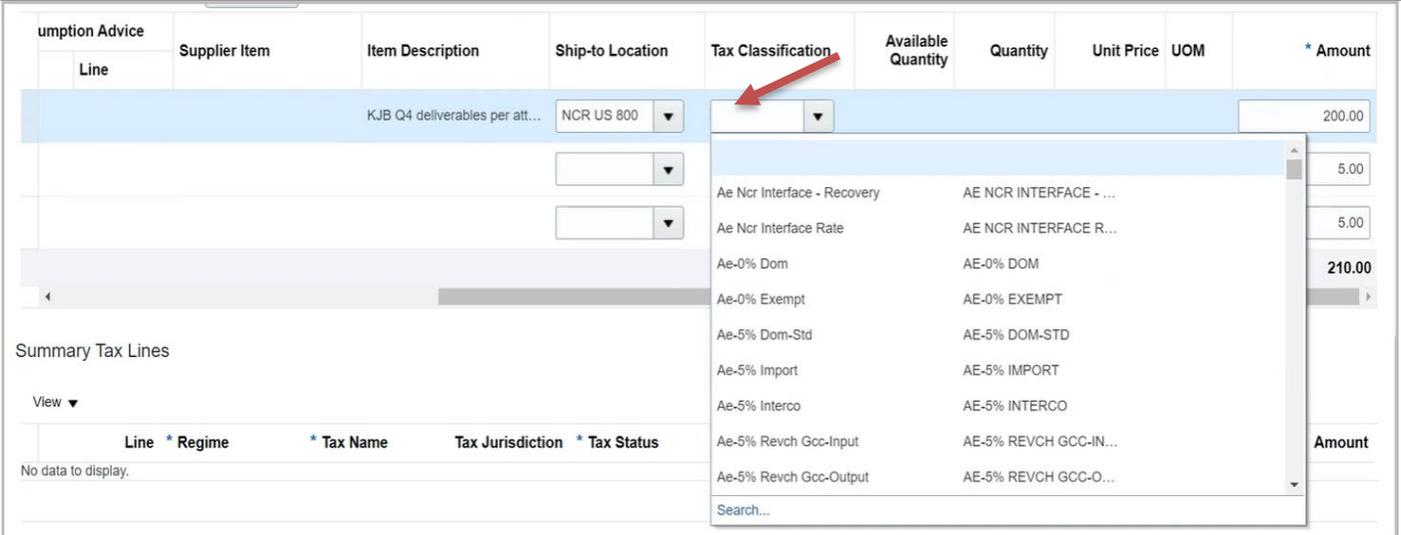
Process Step	Description
<b>12</b>	<b>Creating Invoice (PO Invoice)</b> Click the “+” to add additional lines if needed i.e., freight, miscellaneous, etc.

Lines

View ▾ + × [Cancel Line]

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification
		* Number	* Line	* Schedule	Number	Line				
2	Item ▾	2011780...	1	1				KJB Q4 deliverables per att...	NCR US 800 ▾	▾
3	Freight ▾								▾	▾
1	Miscellaneous ▾								▾	▾
<b>Total</b>										

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

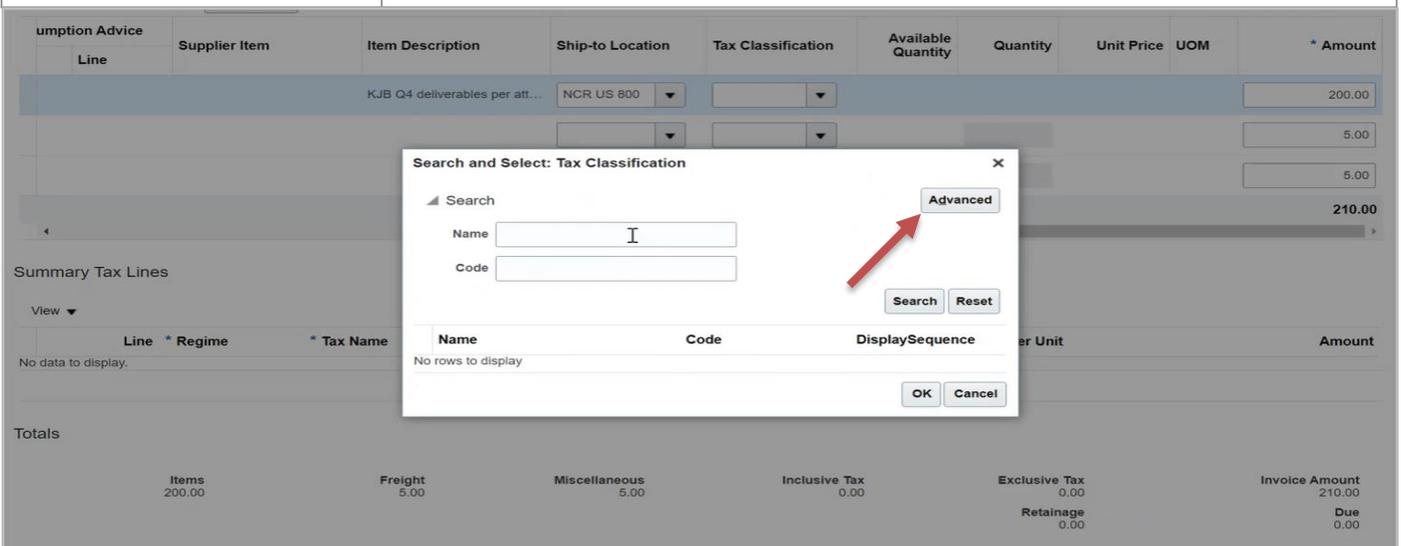


Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount
		KJB Q4 deliverables per att...	NCR US 800						200.00
									5.00
									5.00
									210.00

Summary Tax Lines

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	Amount
No data to display.					

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



Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount
		KJB Q4 deliverables per att...	NCR US 800						200.00
									5.00
									5.00
									210.00

Summary Tax Lines

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	Amount
No data to display.					

Totals

Items	200.00	Freight	5.00	Miscellaneous	5.00	Inclusive Tax	0.00	Exclusive Tax	0.00	Retainage	0.00	Invoice Amount	210.00	Due	0.00
-------	--------	---------	------	---------------	------	---------------	------	---------------	------	-----------	------	----------------	--------	-----	------

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

The screenshot shows a 'Search and Select: Tax Classification' dialog box overlaid on a background table. The dialog has a search section with two dropdown menus: 'Name' (set to 'Starts with') and 'Code' (set to 'Contains' with the value 'oh'). Below these are buttons for 'Search', 'Reset', 'Add Fields', and 'Reorder'. The 'Search' button is highlighted with a red box. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background table shows columns for Line, Supplier Item, Item Description, Ship-to Location, Tax Classification, Available Quantity, Quantity, Unit Price, UOM, and Amount. A total of 210.00 is visible.

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

The screenshot shows the same 'Search and Select: Tax Classification' dialog box, but now it displays a list of search results. The list has columns for 'Name', 'Code', and 'DisplaySequence'. The results are:
 

- Us Oh Tax 0% | US OH TAX 0%
- Us Oh Tax 6.750% | US OH TAX 6.750%
- Us Oh Tax 7.250% | US OH TAX 7.250% (highlighted with a red arrow)
- Us Oh Tax 7.500% | US OH TAX 7.500%
- Us Oh Tax 7.800% | US OH TAX 7.800%

 The 'OK' button at the bottom right of the dialog is highlighted with a red box. The background table is the same as in the previous screenshot.

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

Create Invoice ?

Invoice Actions ▾ Save Save and Close Submit Cancel

Identifying PO 2011780357  
Supplier KJB INTEGRATED SOLUTIONS LLC  
Taxpayer ID  
Supplier Site US-01COLUMBUS  
Address 328 BROWNSFELL DRIVE, COLUMBUS, OH 43235  
Supplier Tax Registration Number

Remit-to Bank Account XXXXX2502  
Unique Remittance Identifier  
Unique Remittance Identifier Check Digit  
Description SUPPLIER PORTAL-PO  
Attachments None +  
Tax Control Amount

\* Number TESTPO1  
\* Date 4/11/22  
Type Invoice  
Invoice Currency USD - US Dollar  
Payment Currency USD - US Dollar

Customer  
Customer Taxpayer ID 31-0387920  
Name NCR CORPORATION  
Address

Lines

## 5. Creating Invoice without PO (Purchase Order)

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

Consigned Inventory

- Review Consumption Advises
- 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

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

Process Step	Description
<b>3</b>	<p><b>Creating Invoice without PO (Purchase Order)</b></p> <p>Click <b>“+”</b> to add line items in the <b>Lines</b> section. Enter the invoice detail lines.</p>

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

Supplier: CREDLY INC  
 Taxpayer ID: [ ]  
 Supplier Site: US-01NEW YORK  
 Address: 6th Floor, NEW YORK, UNITED STATES  
 Supplier Tax Registration Number: [ ]

Remit-to Bank Account: XXXXX4534  
 Unique Remittance Identifier: [ ]  
 Unique Remittance Identifier Check Digit: [ ]  
 Description: [ ]  
 Attachments: None +  
 Tax Control Amount: [ ]

\* Number: TESTNONPO1  
 \* Date: 4/11/22  
 Type: Invoice  
 Invoice Currency: USD - US Dollar  
 Payment Currency: USD - US Dollar

Customer  
 Customer Taxpayer ID: 31-0387920  
 Name: NCR CORPORATION  
 Address: [ ]  
 \* Requester Email: [ ]  
 Requester Name: [ ]

Lines

View + [ ] [ ] [ ] Cancel Line

* Number	* Type	Ship-to Location	Ship-from Location	Tax Classification	* Amount	Description
1	Item	[ ]	[ ]	[ ]	100.00	[ ]
<b>Total</b>					<b>100.00</b>	

Summary Tax Lines

Process Step	Description
<b>5</b>	<p><b>Creating Invoice without PO (Purchase Order)</b></p> <p>Click <b>Search</b> to find the location.</p>

Supplier: CREDLY INC  
 Taxpayer ID: [ ]  
 Supplier Site: US-01NEW YORK  
 Address: 6th Floor, NEW YORK, UNITED STATES  
 Supplier Tax Registration Number: 10012 BOLLENGO (TO)  
 6590 SHILOH ROAD-ALPHARET  
 6610 SHILOH ROAD-ALPHARETTA ...  
 ABU DHABI - NCR STORE  
 ABU DHABI -DUPLICATE OF TT0116  
 ABU DHABI-CENTER TOWER  
 ACCENTURE TECHNOLOGY  
 ACCRA  
 ACRE, VIRTUAL  
 ADAMSTOWN  
 Search...

Remit-to Bank Account: XXXXX4534  
 Unique Remittance Identifier: [ ]  
 Unique Remittance Identifier Check Digit: [ ]  
 Description: [ ]  
 Attachments: [ ]  
 Tax Control Amount: [ ]

\* Number: TESTNONPO1  
 \* Date: 4/11/22  
 Type: Invoice  
 Invoice Currency: USD - US Dollar  
 Payment Currency: USD - US Dollar

Customer  
 Customer Taxpayer ID: [ ]  
 Name: CORPORATION  
 Address: [ ]  
 \* Requester Email: [ ]  
 Requester Name: [ ]

Lines

View + [ ] [ ] [ ] Cancel

* Number	* Type	Ship-to Location	Ship-from Location	Tax Classification	* Amount	Description
1	Item	[ ]	[ ]	[ ]	100.00	[ ]
<b>Total</b>					<b>100.00</b>	

Summary Tax Lines

Process Step	Description
<b>5.1</b>	<b>Creating Invoice without PO (Purchase Order)</b> Select <b>Advanced</b> for additional search options.

The screenshot shows a software interface for creating an invoice. A dialog box titled "Search and Select: Ship-to Location" is open in the center. The dialog has a "Search" section with a text input field for "Name" and a dropdown menu set to "Advanced". Below the input field are "Search" and "Reset" buttons. The main area of the dialog is empty, with the text "No rows to display" and "OK" and "Cancel" buttons at the bottom. In the background, the main form is partially visible, showing fields for Supplier (CREDLY INC), Taxpayer ID, Supplier Site (US-01NEW YORK), Address (6th Floor, NEW YORK, UNITED STATES), and Invoice Number (TESTNONPO1).

Process Step	Description
<b>5.2</b>	<b>Creating Invoice without PO (Purchase Order)</b> Enter the <b>Name</b> search criteria.

This screenshot shows the same software interface as the previous one, but the dropdown menu in the "Search and Select: Ship-to Location" dialog is open. The "Name" option is highlighted with a red box. The dropdown menu lists various search criteria: "Starts with", "Ends with", "Equals", "Does not equal", "Less than", "Less than or equal to", "Greater than", "Greater than or equal to", "Between", "Not between", "Contains", "Does not contain", "Is blank", and "Is not blank". The "Advanced" button is now disabled, and the "Basic" button is active. The background form remains the same as in the previous screenshot.

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

Supplier: CREDLY INC  
 Taxpayer ID: [blank]  
 Supplier Site: US-01NEW YORK  
 Address: 6th Floor, NEW YORK, UNITED STATES  
 Supplier Tax Registration Number: [blank]

Remit-to Bank Account: XXXXX4534  
 Unique Remittance Identifier: [blank]  
 Unique Remittance Identifier Check Digit: [blank]  
 Description: [blank]

\* Number: TESTNONPO1  
 \* Date: 4/11/22  
 Type: Invoice  
 Invoice Currency: USD - US Dollar  
 Payment Currency: USD - US Dollar

Customer Taxpayer ID: 31-0387920

Customer Taxpayer ID: 31-0387920

Requester Email: [blank]  
 Requester Name: [blank]

**Search and Select: Ship-to Location**

Search: Basic

\* Name: Contains oh

Buttons: Search (highlighted), Reset, Add Fields, Reorder

Name: [blank] Description: [blank]

No rows to display

Buttons: OK, Cancel

Lines Table:

* Number	* Type	Ship-to Location	Amount
1	Item	[blank]	100.00
Total			100.00

Process Step	Description
<b>5.4</b>	<b>Creating Invoice without PO (Purchase Order)</b> Select the location then click <b>OK</b> .

Supplier: CREDLY INC  
 Taxpayer ID: [blank]  
 Supplier Site: US-01NEW YORK  
 Address: 6th Floor, NEW YORK, UNITED STATES  
 Supplier Tax Registration Number: [blank]

Remit-to Bank Account: XXXXX4534  
 Unique Remittance Identifier: [blank]  
 Unique Remittance Identifier Check Digit: [blank]  
 Description: [blank]

\* Number: TESTNONPO1  
 \* Date: 4/11/22  
 Type: Invoice  
 Invoice Currency: USD - US Dollar  
 Payment Currency: USD - US Dollar

Customer Taxpayer ID: 31-0387920

Customer Taxpayer ID: 31-0387920

Requester Email: [blank]  
 Requester Name: [blank]

**Search and Select: Ship-to Location**

Search: Basic

\* Name: Contains oh

Buttons: Search, Reset, Add Fields, Reorder

Name	Description
6590 SHILOH ROAD-ALPHARET	
6610 SHILOH ROAD-ALPHARETTA ...	
COLUMBUS OH-150 E.CAMPUS	
DOHA	
DOHA WAREHOUSE	
HURON OH - SAWMILL PKWY.	
JOHANNESBURG-RIVONIA RD	
KAOHSIUNG	
<b>OHIO, VIRTUAL</b>	
PRAGUE - ROHANSKE NABREZI	

Buttons: OK (highlighted), Cancel

Lines Table:

* Number	* Type	Ship-to Location	Amount
1	Item	[blank]	100.00
Total			100.00

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

NCR
Home | Notifications (4) | VT

Create Invoice Without PO Invoice Actions ▾ Save Save and Close Submit Cancel

Supplier: CREDLY INC

Taxpayer ID:

Supplier Site: US-01NEW YORK ▾

Address: 6th Floor, NEW YORK, UNITED STATES

Supplier Tax Registration Number:

Remit-to Bank Account: XXXXX4534 ▾

Unique Remittance Identifier:

Unique Remittance Identifier Check Digit:

Description: MYNCR TEST-REVIEW TAX

Attachments: None +

Tax Control Amount:

\* Number: TESTNONPO1

\* Date: 4/11/22

Type: Invoice

Invoice Currency: USD - US Dollar ▾

Payment Currency: USD - US Dollar

Customer

Customer Taxpayer ID: 31-0387920 ▾

Name: NCR CORPORATION

Address:

\* Requester Email: letitia.johnson@ncr.com

Requester Name: Letitia Johnson

Lines

View ▾ +     Cancel Line

* Number	* Type	Ship-to Location	Ship-from Location	Tax Classification	* Amount	Description
1	Item ▾	OHIO, VIRTUAL ▾	<input type="text"/>	US OH TAX 7.5% ▾	100.00	<input type="text"/>

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

The screenshot shows the NCR software interface. At the top, there is a green header with the NCR logo and navigation icons. Below the header, a notification banner displays a green checkmark and the text: "Invoice TESTNONPO1 has been submitted." This banner is highlighted with a red rectangle. To the right of the notification are buttons for "Create Another" and "Done".

Below the notification, the invoice details are displayed in a grid format:

Supplier	CREDLY INC	Remit-to Bank Account	XXXXX4534	Number	TESTNONPO1
Taxpayer ID		Unique Remittance Identifier		Date	4/11/22
Supplier Site	US-01NEW YORK	Unique Remittance Identifier Check Digit		Type	Invoice
Address	6th Floor, NEW YORK, UNITED STATES	Description	MYNCR TEST-REVIEW TAX	Invoice Currency	USD
Supplier Tax Registration Number		Attachments	None	Payment Currency	USD
		Tax Control Amount			

Customer information is also displayed:

Customer Taxpayer ID	31-0387920	Legal Entity	NCR CORPORATION	Requester Email	letitia.johnson@ncr.com
		Address		Requester Name	Letitia Johnson

Below the customer information, the "Lines" section is visible, showing a table with columns: Number, Type, Ship-to Location, Ship-from Location, Tax Classification, Location of Final Discharge, Amount, Description, and Qua.

Number	Type	Ship-to Location	Ship-from Location	Tax Classification	Location of Final Discharge	Amount	Description	Qua
1	ITEM	OHIO, VIRTUAL		US OH TAX 7.250%		100.00		
<b>Total</b>						<b>100.00</b>		

