



LET YOUR INCREDIBLE JOURNEY BEGIN...

**FOOD DRUG & MASS MERCHANDISE (FDMM)
ENCOR**

For more information, visit ncr.com



Welcome to your NCR Global Interact Solution onboarding checklist!

Thank you for partnering with NCR on this iNCRedible journey. Whether you're new to NCR and are beginning your Program onboarding, or you're adding a new solution to your selling portfolio, this solution checklist will guide you to ramp to success as quickly as possible.

To the right there are tabs with key topics related to the solution you're selling. Each tab has a 30-60-90 day action plan for each topic. The objective is for you to use this document with your channel account manager as an active action plan to track towards success.

This checklist document supplements the guides you have already received:

Your Industry	Food, Drug & Mass Merchandise
Your Region	North America (NAMER)
Your Solution	ENCOR

Solution Skillset Requirements

It is important to understand the solution requirements your company must maintain to sell, implement and support the solution.

Area	Requirement
Executive	Executive Sponsor identified
Sales Certification	Minimum of 2 certified sales professionals; actual numbers defined based on the target geography
Installation Certification	Minimum of 2 certified technicians at all times; actual numbers defined based customer install base
Support Desk Certification	Minimum of 2 certified service professionals at all times. Partner must be capable of delivering Level 1 & 2 support.
Industry Expertise	<ul style="list-style-type: none"> Ability to demonstrate strong working knowledge of operations and electronic payment environment in grocery/food, drug & mass merchandise industry Referenceable customer experience in grocery IT operations
Technical Skillset	<ul style="list-style-type: none"> General Microsoft Windows working knowledge Microsoft Windows networking expertise Understanding of Microsoft SQL Server and Relational databases Connected Payments / OpenEPS knowledge Qualified Integrators and Reseller certification (PCI certification) – Best Practice Understanding of Enterprise Systems\Networking

Complete within

30 days 60 days 90 days

Actions

- | | |
|---|---|
| <input type="checkbox"/> Confirm Executive Sponsor | X |
| <input type="checkbox"/> Identify the contacts who will obtain the Software & Support certification | X |
| <input type="checkbox"/> Identify the contacts who will obtain the Sales certification | X |
| <input type="checkbox"/> Identify the contacts who will obtain the Installation certification | X |

Training & Certification

Following is a high level view of what will be required from a certification perspective. There are many supporting and valuable education modules online. For more specific details, refer to the Training and Certification Guide in the Solution Authorization Form.

Topic	Online, classroom, or OJT	Audience
ENCOR Front Office/POS Sales	Online	Sales
ENCOR Store/Back Office Sales	Online	Sales
ENCOR Front Office/POS Technical	Classroom	Technical
ENCOR Store/Back Office Technical	Classroom	Technical
Migration from ISS45 to ENCOR	Online	Technical

Actions	Complete within		
	30 days	60 days	90 days
<input type="checkbox"/> Confirm contacts have access to NCRU for online classes	X		
<input type="checkbox"/> Schedule classroom certification training through your CAM	X		
<input type="checkbox"/> On-line Sales certification is complete		X	
<input type="checkbox"/> Technical certification is complete			X
<input type="checkbox"/> Support desk certification is complete			X

Ordering

Each new Solution Provider is required to establish an in-house lab solution with NCR hardware. The lab solution will be used for solution training, testing and solution management. Solution hardware should consist of components that will be generally sold in the region. Lab hardware should be pre-purchased and on-site when the on-boarding process begins.

- 1. Lab** – Required for internal use in the solution provider’s training, testing, and configuration environment. Hardware is sold to solution provider at a discount of list price. A Master software key may be requested at no charge for lab and/or demo use. NOT for production use. **The lab equipment MUST be ordered prior to technical training.**
- 2. Demo/trial** – Reseller gets (3) demo/lab keys for a customer’s lab for a trial. Software must be purchased if the software is moved to a production environment. NOT for production use.
- 3. Production use** – For live customer sites.

Talk with your NCR Account Manager for details and prices of current configurations and offerings.

Item	Description
NCR POS	RealPOS XR8 (recommended)
Display	5967, 5968 or non-touch customer monitor
Cash Drawer	
POS Keyboard	Full Touch with 5968 Touch display
Printer	NCR 7167 or 7168
PC Keyboard & Mouse	
Scanner/Scale	
External Hub	
LAN Cables	
Windows 7 media w/ license numbers	
SQL Workgroup media w/ license numbers (do not install SQL Workgroup – this will be done in class)	
POS Software	Will be provided to you

Complete within

30 days 60 days 90 days

Actions

Order Lab equipment prior to classroom training

X

Maintenance & Support Services

NCR offers maintenance and support for hardware and software. Many of these provide additional revenue streams to the solution provider. It's important to understand what is available to you, what is required, and the corresponding expectations.

Name	Required or optional	Description
SW Maintenance & Support	Required	Solution provider is charged 10% MSRP to be billed annually. Solution provider can uplift the charge to the client for your own annuity revenue stream.
Initial Hardware warranty	Included	Hardware automatically comes with a 12 month warranty based on ship date to solution provider. It includes standard depot return and repair.
Extended warranty	Optional	NCR offers extended warranty programs following the initial warranty period ends. Solution provider can uplift the charge to the client for your own annuity revenue stream.
Support Desk	Required	Solution provider provides Level 1 & Level 2 Support to your clients. Level 3 tickets are escalated to NCR. Definitions and expectations will be shared by your CAM.
Escalation process for live sites	Required	Tickets and logs are escalated to NCR via the N@YS tool (NCR @ Your Service). Your CAM will share the process and ensure you are trained on the tool.
Pre-installation lab configuration	Optional	During the pre-installation phase of setting up your lab system, you have a resource to help guide you through troubleshooting on configuration.

Complete within

Actions	30 days	60 days	90 days
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- | | | | |
|--|---|---|--|
| <input type="checkbox"/> CAM shares the hardware maintenance options and costs | X | | |
| <input type="checkbox"/> CAM requests SMEs access to N@YS | X | | |
| <input type="checkbox"/> CAM shares Level 1 & 2 expectations and requirements for logs | | X | |

Marketing & Sales Support

NCR offers many marketing and sales resources to help you progress and close business opportunities. Access these assets [online](#).

Pre-Sales Technical Consultant

Sales Collateral & Assets

Sales Presentation

Value Selling tools

Stock Photography & Images

Partner Website: Logo & messaging

Branding

Corporate Design – Partner Guidelines

Solution Authorized Logos

Events

ENCOR banner

Tradeshaw monitor loop

Event Participation

Utilizing MDF

Complete within

	30 days	60 days	90 days
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Actions

- | | | | | |
|--------------------------|--|---|--|---|
| <input type="checkbox"/> | Introductions with your pre-sales technical consultant and understand when to engage | X | | |
| <input type="checkbox"/> | Understand the sales and marketing collateral assets available and where to find them | X | | |
| <input type="checkbox"/> | Partner web site updated with solution messaging | X | | |
| <input type="checkbox"/> | Create annual marketing plan (mailing, trade shows, website, social media, case studies, etc.) | | | X |
| <input type="checkbox"/> | Understand MDF program and start executing marketing campaigns | | | X |
| <input type="checkbox"/> | Get added to distribution lists and solution calls | X | | |

Business Plan

One of the requirements of the Interact Program is for partners to provide a joint business plan. The goal of business plan is ensure that NCR and the Partner are working towards strategic goals together and is the plan to achieve the assigned quota.

If you have already created a Business Plan, be sure to update it with this solution. If you haven't created one yet, the template is attached for your reference.

Partners should complete the business plan below and send it to the [Channel Programs Team](#) at NCR and your Channel Account Manager.



Microsoft Excel
Worksheet

Complete within

30 days	60 days	90 days
------------	------------	------------

- | Actions | 30
days | 60
days | 90
days |
|---|------------|------------|------------|
| <input type="checkbox"/> Complete or update the Business Plan with your Channel Account Manager | | | X |
| <input type="checkbox"/> Send your business plan to the Channel Programs Team | | | X |

Tools



MyNCR

What is it? A secure portal that allows customers and business partners to transact with NCR. It is your gateway to access many different applications, including some tools noted below.

How do I access it? The “MyNCR” button is at the top of NCR’s home page at:

Note: Your company administrator must have added you to your company’s membership for you to have access.



FDMM Solution Provider sub-web site (ID/PW required)

What is it? A solution provider-specific password protected web site with information such as: announcements, software support, technical bulletins, release notes, manuals, policies and more.

How do I access it? Work with your CAM to get an ID and password.

Interact Program Tools

Interact Program Tools

What is it? A Salesforce cloud environment that is designed to provide a user collaboration community for NCR Partners. It includes access to program benefits such as MDF, Deal Registration and more.

How do I access it? It is an application found within MyNCR.



Sales Asset Manager (SAM)

What is it? NCR’s online access to marketing and sales assets.

How do I access it? It is an application found within MyNCR.



NCRU (NCR University)

What is it? Provides learning services in the form of online learning launch/completion, instructor led training registration/completion and tracking of transcript histories for all users.

How do I access it? It is an application found within MyNCR. Your company Administrator has to first add you to the company’s membership and then grant you access to NCRU.

N@YS

N@YS (NCR @ Your Service)

What is it? A web interface which allows you to create, update, and review the status of service requests, such as technical incidents with customer sites and failed hardware warranty claims.

How do I access it? It is an application found within MyNCR. Your company Administrator has to first add you to the company’s membership and then you can add N@YS to your MyNCR application list.

Actions	Complete within		
	30 days	60 days	90 days
<input type="checkbox"/> Your company Administrator adds all appropriate contacts to your company’s membership so they can access MyNCR and grants employees to necessary applications.	X		
<input type="checkbox"/> Get access to the FDMM Solution Provider sub-website and get added to the Wednesday Letter email distribution list.	X		
<input type="checkbox"/> Online training modules can be accessed on Exploration Plaza, the portal used for the Program onboarding	X		