

Allegion 360 Portal

Tips for using the Order Status Application



Company and Branch Selection

You have the ability to select the company and the branch that you'd like to see orders for. When you select the branch you can select a single branch or choose Headquarters (which is always the top option in the branch list) to see all orders for the entire company

Search

The search functionality allows you to enter either an order #, purchase order #, quote #, or invoice # and find results. You'll notice on the left panel you can select or deselect any of those options to potentially speed up your search if you know exactly what kind of number you're looking for. You can also use the partial/exact match toggle to determine if you want the search to find any text string or the exact number only. The results will appear at the bottom and you can click on any of those links to see the details.

The screenshot shows the Allegion 360 Portal search interface. At the top, there is a navigation bar with the Allegion logo and links for 'Purchase Orders', 'Search', and 'My Profile'. The main content area is divided into a left sidebar and a main search area. The sidebar contains a 'Collapse' button, a 'Company' dropdown, a 'Branch' dropdown set to 'Headquarters', and a 'Search For' section with four checked checkboxes: 'Order #', 'Purchase Order #', 'Quote #', and 'Invoice #'. Below this is a 'Search Type' section with two radio buttons: 'Exact Match' (unselected) and 'Partial Number' (selected). The main search area has a 'Company' dropdown, a 'Branch' dropdown set to 'Headquarters', and a 'Search Options' section with 'Search Type: Partial Match' and 'Search: Purchase Order #, Order #, Invoice #, Quote #'. A search input field with a magnifying glass icon and a 'Submit' button is located below the search options. The 'Search Results' section displays a table with three columns: 'Company', 'Type', and 'Number'. The table contains three rows, each with a blurred company name, the type 'Order', and a blurred number.

Company	Type	Number
[Blurred]	Order	[Blurred]
[Blurred]	Order	[Blurred]
[Blurred]	Order	[Blurred]

Purchase Orders List

Company: [redacted] Branch: Headquarters

Purchase Orders - All Purchase Orders booked in Last 60 Days

Export Filter Results

Find an item Show/Hide Columns

Status	PO #	Order #	Project	Quote Number	Order Date	Estimated Ship Date
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/10/19	01/18/19
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/09/19	01/14/19
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/09/19	01/24/19
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/09/19	01/24/19
[factory icon]	[redacted]	[redacted]	2018 CGP Stock Quote	[redacted]	01/09/19	01/24/19

When you click on Purchase Orders in the top menu (or Purchase Order List under search results in the bottom right) you'll see a list of all purchase orders from the last 60 days. You'll see an icon for the status of the order (factory for open and delivery truck for shipped) along with all of the main details about the order. You can sort by any column and click into any PO, order, or quote to see the details. You can also find any specific order (that was placed in the last 60 days) by typing the number into the Find box.

Filter Results

If you'd like to see a more specific list you can click the Filter Results button where you're able to filter by Brand or Status. Each status should give you a count of how many orders are currently in that status.

Company: [redacted] Branch: Headquarters

Purchase Orders - All Purchase Orders booked in Last 60 Days

Export Filter Results

Find an item Show/Hide Columns

Status	PO #	Order #	Project	Quote Number	Order Date	Estimated Ship Date
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/10/19	01/18/19
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/09/19	01/14/19
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/09/19	01/24/19
[factory icon]	[redacted]	[redacted]	[redacted]	[redacted]	01/09/19	01/24/19
[factory icon]	[redacted]	[redacted]	2018 CGP Stock Quote	[redacted]	01/09/19	01/24/19

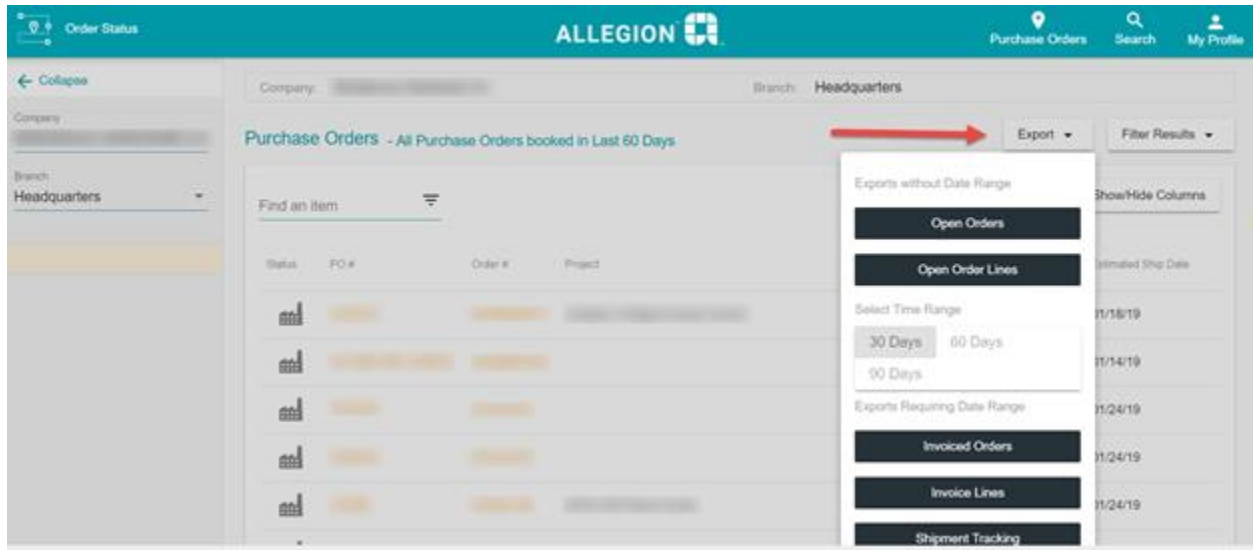
Clear All

Brand: All

Status:

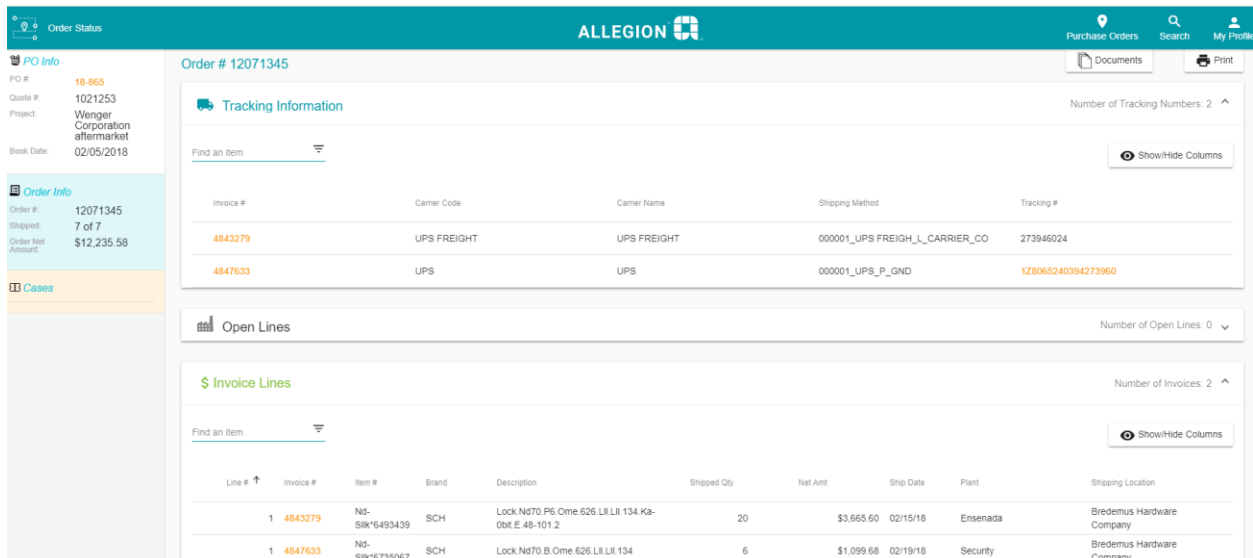
- All 57
- Open 11
- Partial 2
- Shipped 44
- Past Due 3

Export



When you click the Export button you have the ability to generate a download of an Excel spreadsheet that contains the data for the type of export you want. Open Orders and Open Order Lines do not require a date range and will return all orders and all order lines for open orders. If you'd like to download invoices or shipment tracking you'll first need to select a date range. The options are 30, 60, and 90 days. Invoices provides data at the overall invoice level and invoice lines contains all lines on an invoice. The shipment tracking file contains all tracking numbers and carrier information related to each invoice.

Purchase Order, Order, and Invoice Pages

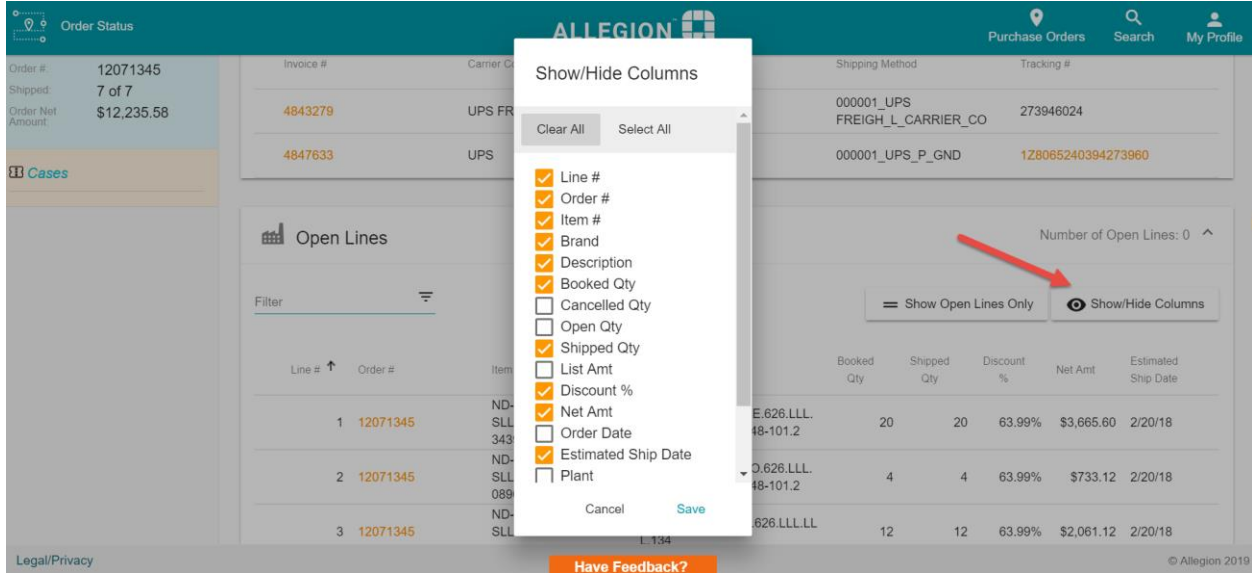


When you click from the search page or the purchase order list onto a specific purchase order, order, or invoice you'll see the general layout of the page above. Purchase order is the highest level and it's what the customer sends to Allegion as a purchase order number. If there have been shipments against the order you'll see the tracking information first. If the carrier provides web tracking you can click on the tracking number link and see the status of the order live on the UPS or FedEx site. Below that you can see any open lines on the order. If an order is

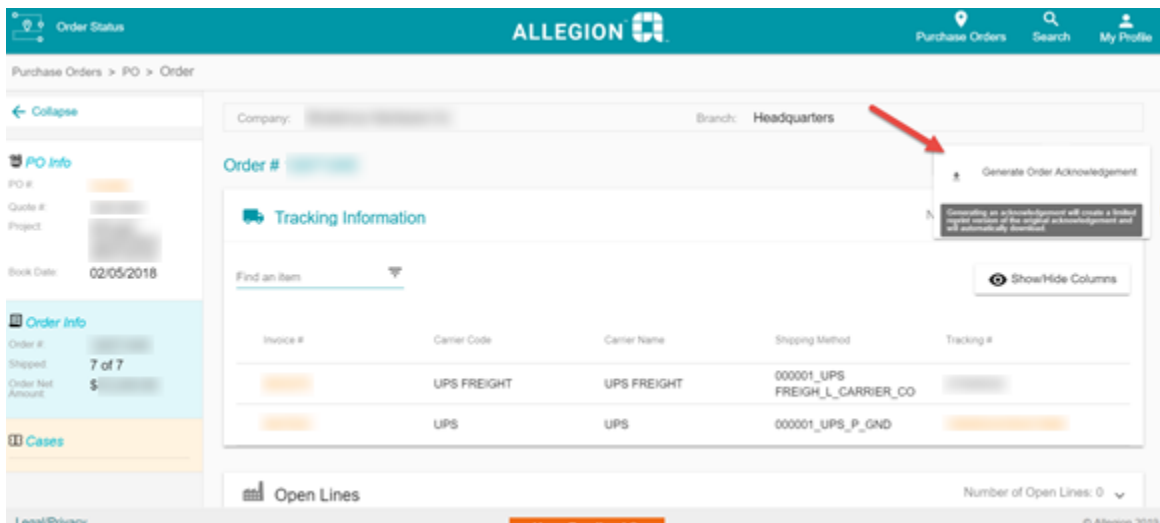
fully shipped there is a button to show all lines regardless of status that will make them visible. At the bottom will be all invoice lines.

Show/Hide Columns

On any section of an order page (tracking information, open lines, invoice lines) you can customize which fields are shown. Once you select the fields you care about – these same fields will be visible on any other order that you navigate to. This can be changed at any time and your new settings will be automatically saved.



Documents



If you'd like to print an invoice or a sales order acknowledgement you can click on the Documents button. Once you click you should see 4 options. If you choose to Generate an Invoice or Order Acknowledgement then you'll automatically get a download in your browser of a formatted PDF. This is generated by our application and may be

missing some of the customized fields that get included by some of Allegion's ERPs. If the original invoice or acknowledgement is needed you can choose the Request option. This will generate a case for the support team to find the original invoice or acknowledgement from the ERP and send it to the customer's email. This request option is only available to external users.

Generated Invoice Example



11819 North Pennsylvania Street
Carmel, IN 46032

Invoice

Invoice Number: [REDACTED] Order Number: [REDACTED] Customer PO: [REDACTED]	Invoice Number: [REDACTED] Allegion Order Number: [REDACTED] Allegion PO: [REDACTED] Invoice Date: 2/5/2018	Quote Number: [REDACTED] Project/Job Name: [REDACTED]
---	--	--

Ship To Address:

[REDACTED]

Remit To Address:

SCHLAGE LOCK COMPANY LLC
15870 COLLECTION CENTER DR
CHICAGO, IL 60693

Brand	Line Number	Item Number	Item Description	Qty	Shipping Location	List Unit Price	Price Book Discount	Net Unit Price	Total Net Inv Amt	Freight Amount
SCH	22	043156614 325	LOCK.ND70.B.D.RHO .626.13-247.10- 025.134	12	[REDACTED]	\$543.00	[REDACTED]	[REDACTED]	[REDACTED]	\$0.00
SCH	1	ND- SLLK*6735 067	LOCK.ND70.B.OME. 626.LLL.LLL.134	6	[REDACTED]	\$509.10	[REDACTED]	[REDACTED]	[REDACTED]	\$0.00

Additional Features

From an order, PO, or invoice page you'll have the ability to print the page to generate a PDF of everything you see on the screen. You can also view any cases associated with the order you're viewing. External users will have the ability to submit a new case related to that order directly from the order page. You can also see an example of clicking on a tracking number link which will load the UPS page.

The screenshot shows the ALLEGION web interface for a Purchase Order. The top navigation bar includes 'Order Status', 'ALLEGION', 'Purchase Orders', 'Search', and 'My Profile'. The main content area is titled 'Purchase Orders > PO'. On the left sidebar, there are sections for 'PO info' (with PO #, Quote #, Project, Stock Date: 02/05/2018, and Net Amount) and 'Cases'. The main area displays 'Purchase Order #' and 'Branch: Headquarters'. It features a 'Tracking Information' section with a search bar and a table of tracking items. A 'Print' button is highlighted in a red box. The table below shows tracking details:

Invoice #	Carrier Code	Carrier Name	Shipping Method	Tracking #
	UPS FREIGHT	UPS FREIGHT	000001_UPS_FREIGHT_L_CARRIER_CO	
	UPS	UPS	000001_UPS_P_GND	

Quotes Page

If you click on a quote number from search or from an order page you'll see a list of all purchase orders related to that quote.

The screenshot shows the ALLEGION web interface for a list of purchase orders related to a specific quote. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Purchase Orders List For Quote #'. It features a search bar and a table of purchase orders. A 'Show/Hide Columns' button is visible. The table below shows the list of purchase orders:

Status	PO #	Order #	Project	Quote Number	Order Date	Estimated Ship Date
					07/23/18	08/30/18
					06/18/18	06/27/18
					06/05/18	06/25/18
					06/01/18	06/19/18
					05/18/18	05/30/18