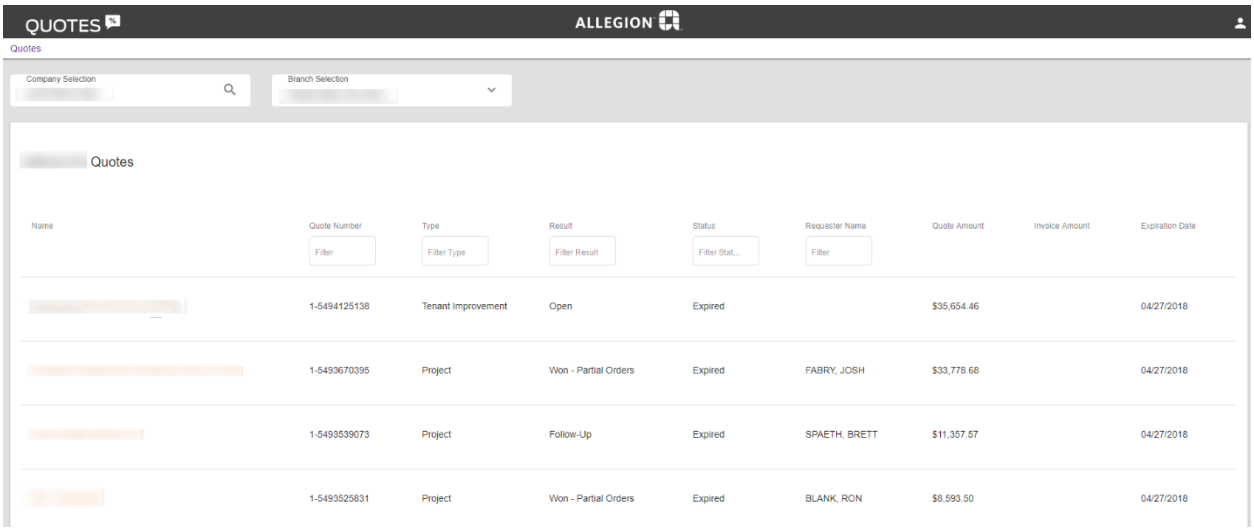
Allegion 360 Portal

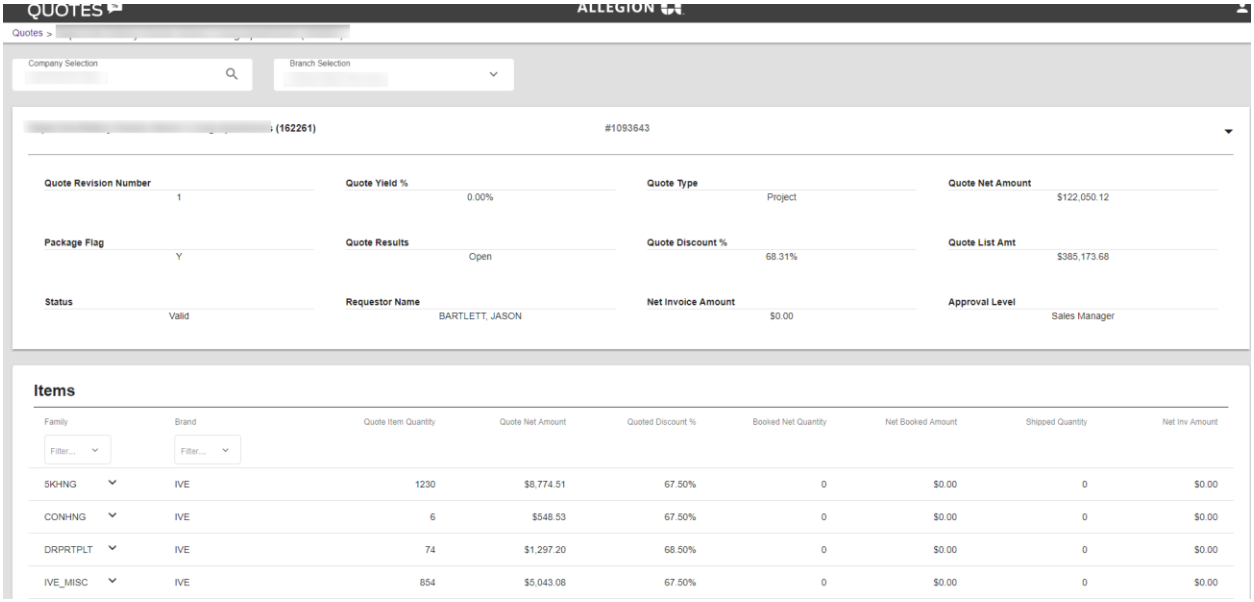
Tips for using the Quotes Dashboard

Quote List



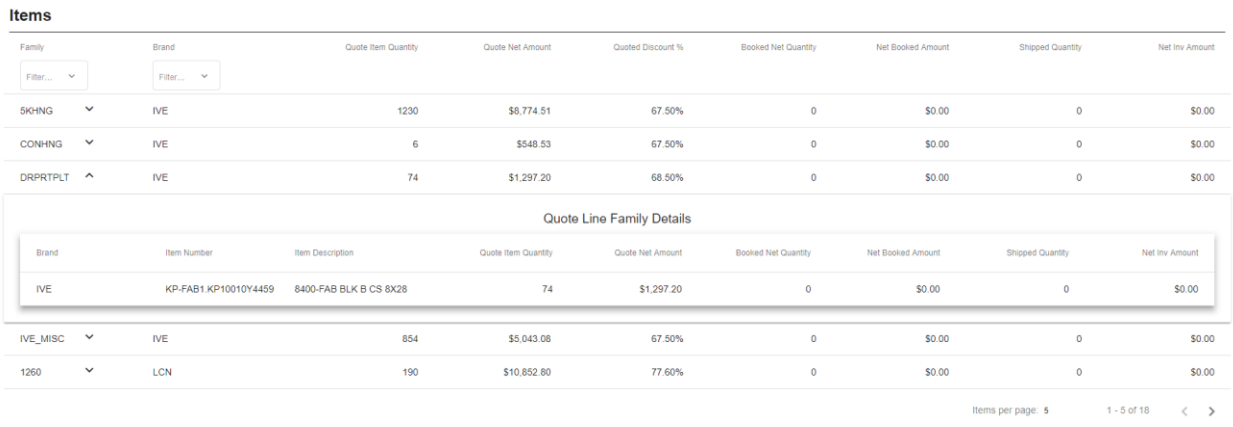
The Quotes app requires an external user to be associated to at least one branch of their company. This can be done in the Access Management app by the admin of the company or an internal Allegion admin. When first logging in, the user will be able to select which branch of the company they'd like to see quotes for. You'll be able to select multiple branches if you'd like to see all quotes across the entire company. Once the branch has been selected – you'll see all Valid and Expired Quotes associated with those branches. You can filter the table by any of the available filter fields or sort by any field. You'll be able to export this list of quotes to Excel or click into any individual quote.

Individual Quote



Once you click into an individual quote you can see all of the details about that quote with the Quote Header details at the top and the individual Family/Series items that were quoted for purchase below. This will allow you to see the quantity and amount for that Family/Series item on the quote, how much was ordered, and ultimately how much was invoiced. You can also print the results of this page.

Specific Line Items Ordered



On each Family/Series item you can expand to see exactly which item number was ordered that's related to that Family/Series. Quotes are done at the Family/Series level only so the individual line items get associated once an order is placed with Allegion for a specific line item.