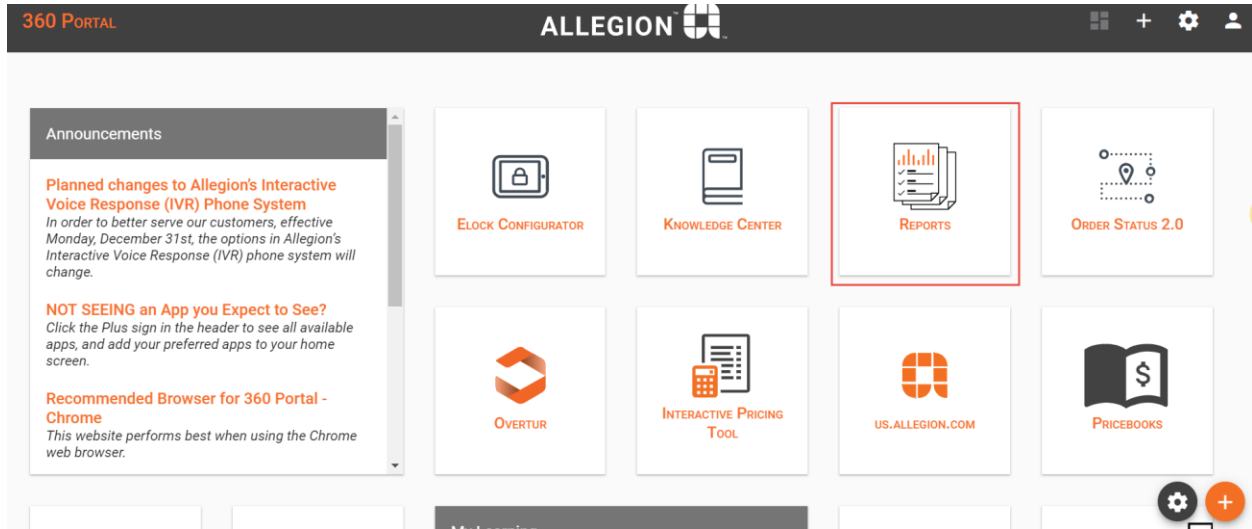
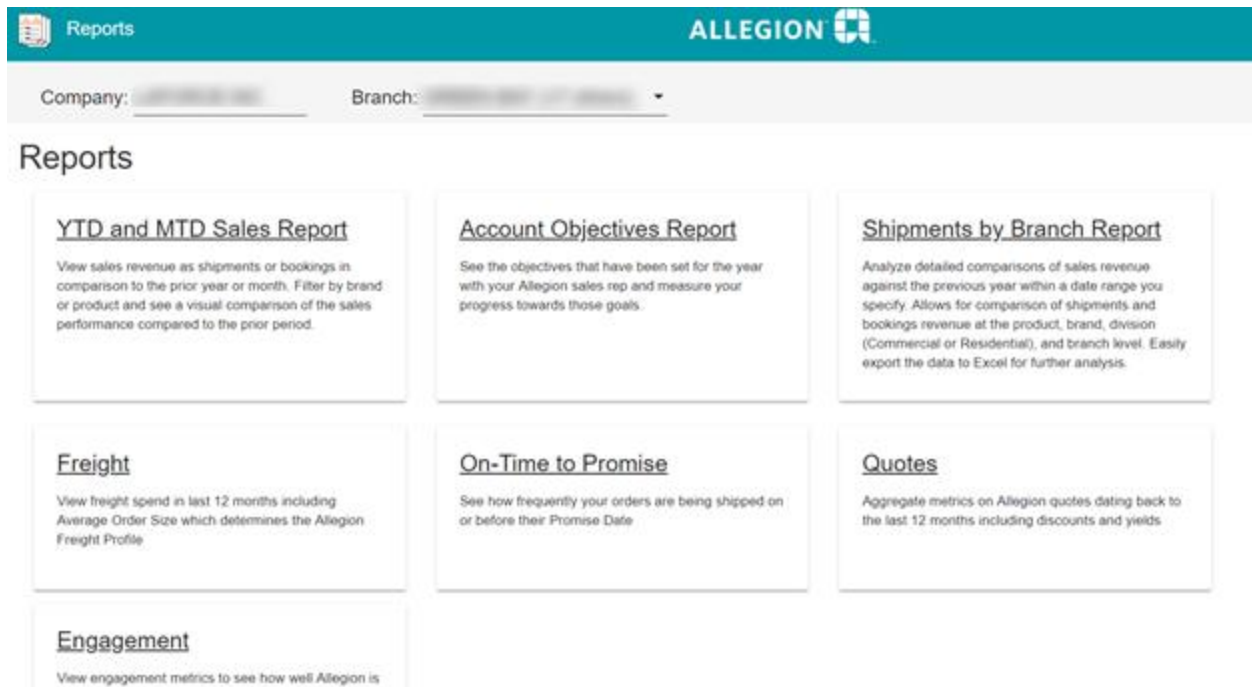


# Allegion 360 Portal

## Tips for using the Reports Application



### Available Reports



The reports app has 7 reports available at launch, but this list will be dynamic and will eventually be sorted into categories as we add more reports. To grant access to these reports the Company Admin (external admin user) will need to grant individual users branch access and access to the Reports app (as well as the specific roles in the Reports app). You can give a user access only to Shipping and Quotes reports, only sales reports, company information (like Account Objectives) or give them all roles.

## Access Management Reports Access and Role Selection

The screenshot shows the ALLEGION user management interface. On the left, a sidebar contains 'Apps', 'Users', and 'Company', with 'Users' highlighted. The main content area is titled 'User - Bryan Povlinski'. It features a user profile card on the left with a 'BP' logo, name 'Bryan Povlinski', company 'FAIRWAY SUPPLY INC', email 'bpovlins@gmail.com', and an 'Admin' button. To the right, there are two tabs: 'Application Access' and 'User Activity'. The 'Application Access' tab is active, displaying a table with columns for 'Access', 'App Name', and 'Roles'. Two rows are visible: 'Reports' with '6 Roles Selected' and 'Authorized Seller Program' with '3 Roles Selected'. A red box highlights the 'Reports' row. A red arrow points to a 'Save' button in the bottom right corner.

Having access to the Reports app will make it available in the users' app store. Granting them roles will give them access to specific reports that correspond with those roles (i.e. YTD and MTD Sales Report is part of the Sales role, Freight is part of the Shipping role and so on).

## Access Management Branch Access

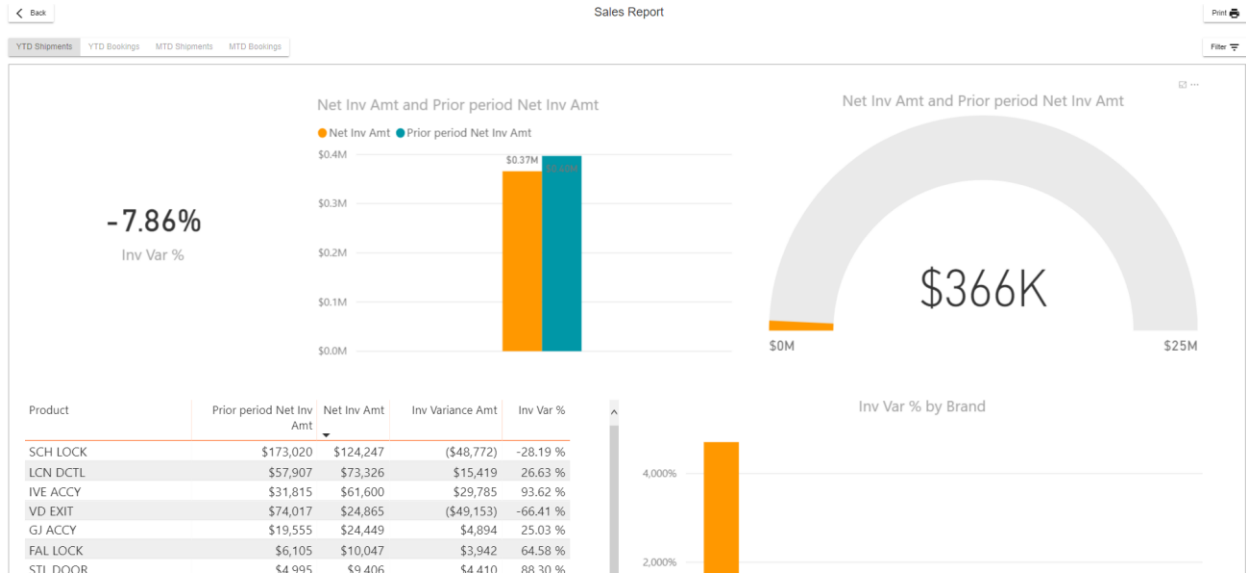
The screenshot shows the ALLEGION user management interface for branch access. On the left, a sidebar contains 'Apps', 'Users', and 'Company', with 'Company' highlighted. The main content area is titled 'Change Company' and features a 'FS' logo, an 'Address' field, and an 'Enrolled Employees' section showing '7 EMPLOYEES ENROLLED' and 'DEACTIVATED EMPLOYEES →'. To the right, there is a 'Branches' section with a 'Users' button highlighted. Below this is a table with columns for 'Name' and 'Email', containing several rows of data. A red arrow points to a search icon in the top right corner of the table area.

Branch access will determine which branches show up in the branch selection box for a user. If they don't have access to a branch they won't see it in the selection box and won't be able to view any reports for that branch.

The branch selection box allows you to select a single branch and view all data related to that branch, multiple branches so the data is rolled up together for all selected branches, or if you select all branches it will essentially function as a HQ view to see all data for the entire company.

## YTD and MTD Sales Report

This report will show data for the current year and month and compare both shipments and bookings to the same period in the prior year. There is a filter for brand on the top right and clicking on any product in the bottom left table will also filter the report down to the product level. At the top you'll see tabs to select either Bookings or Shipments and the Year to Date or Month to Date views



## Account Objectives Report

This report shows all account objectives established between the customer and the salesperson in the current year.

Reports ALLEGION My Profile

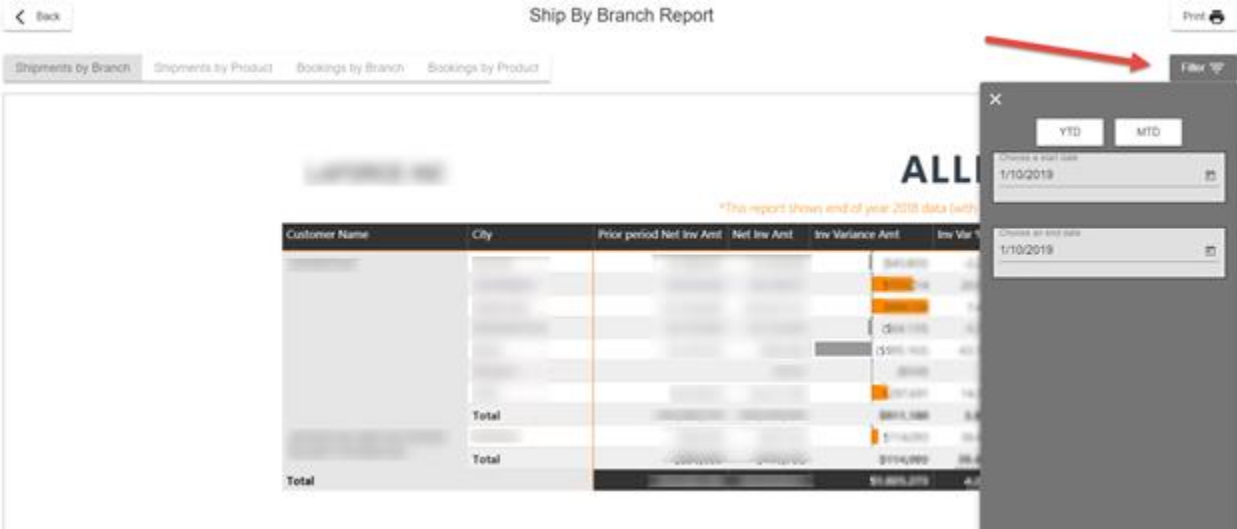
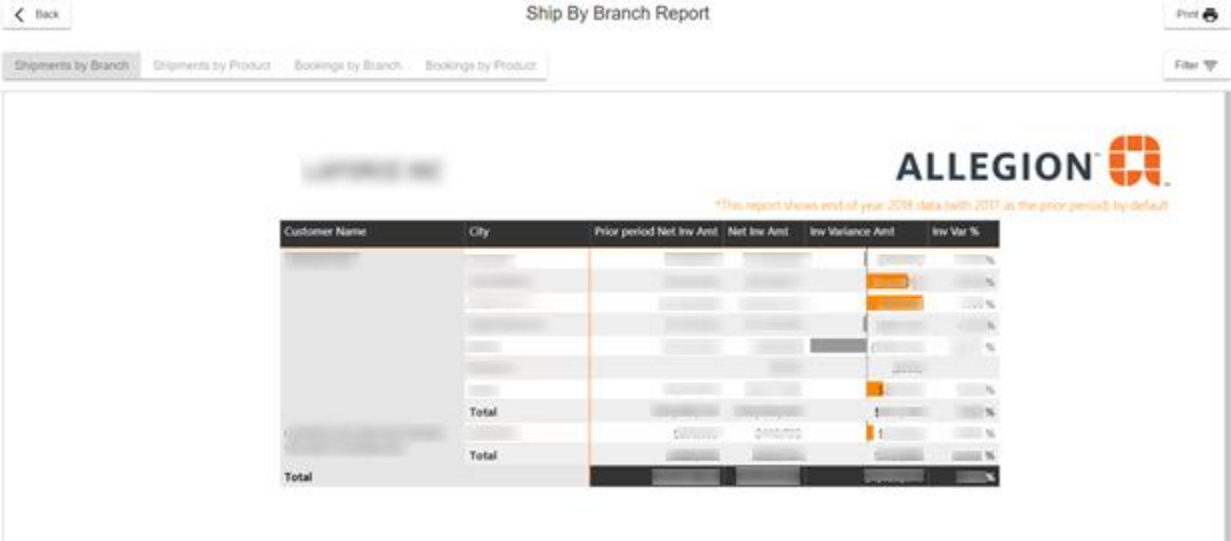
Company: Branch:

### Account Objectives Report

Objective Description	Account Goal	YTD Progress	Objective Year	Objective Product	Objective Status	Objective Type
Conduct monthly quote follow up meetings with all account personnel.	12	Not Available	2018	All Product Sales	Active	Contract Quote
Grow overall 2018 TI Quote sales by 8.3% over 2017		Not Available	2018	Hardware - FAL	Active	Discretionary Project
Increase product share leveraging current EU rep relationship and by building ISC relationship with account stakeholders. Identify account SWOT		Not Available	2018	Electronics	Active	Discretionary Project
TI Program: Support and grow TI sales 15% YOY or 1 Overall goal of	0		2018	Not Available	Active	Discretionary Project
Monthly: work with outside sales force to bolster knowledge of program, feed through Small Project Sales group at to increase sales and awareness.						
Work with Small Projects department to increase Allegion share of business		Not Available	2018	Hardware - FAL	Active	Discretionary Project
Work with spec writing team to include LCN Aluminum in Allegion AND open specs		Not Available	2018	LCN Aluminum	Active	Discretionary Project
Grow all sales with including purchases through OEM software partners and Wholesalers by 10%	0	Not Available	2018	Not Available	Active	Grow ALLE Share of Purchases
Grow Indy year over year 8%		Not Available	2018	All Product Sales	Active	Grow ALLE Share of Purchases
Grow Troy Allegion Premium product (Schlage, Von Duprin, LCN), Republic & IVES sales through package enforcement & discretionary project.		Not Available	2018	All Product Sales	Active	Grow ALLE Share of Purchases

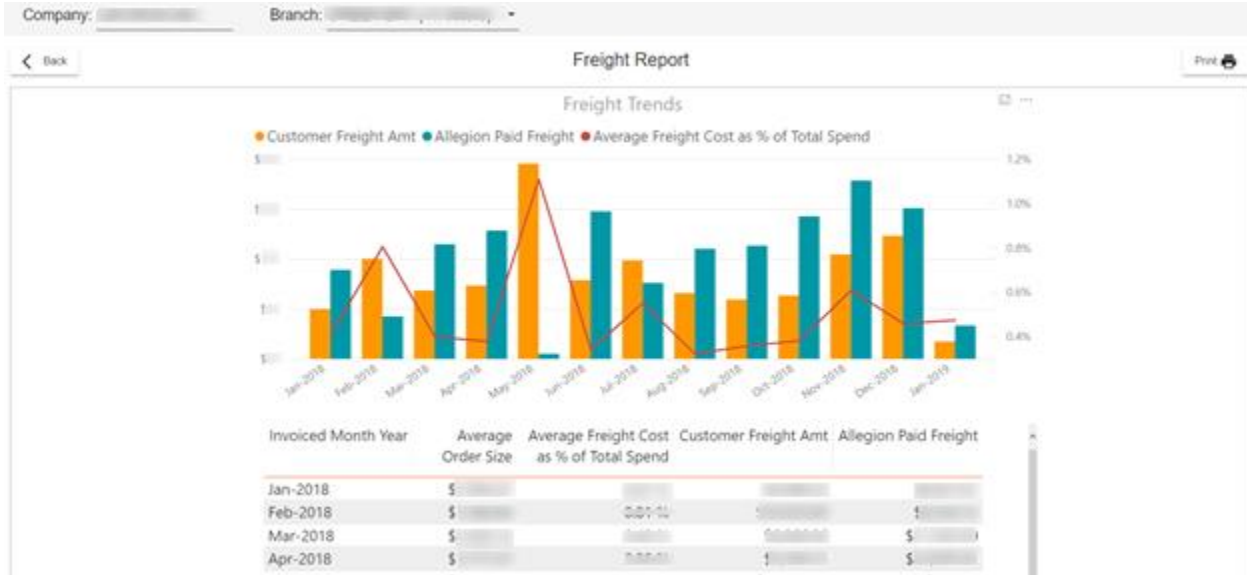
# Shipments by Branch Report

This report allows you to customize the date range you'd like to see in the current year and compare the data to the same period in the previous year. Clicking on Filter in the top right gives you a start date and end date selector. There are tabs to select a branch view or a brand/product level view.



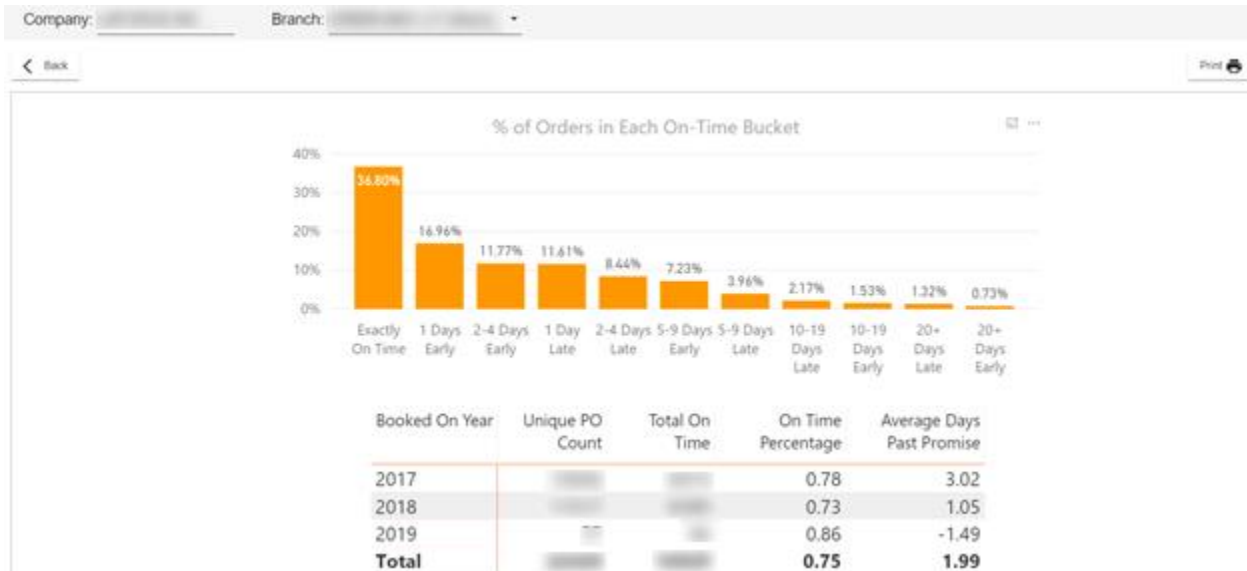
## Freight Report

This report allows you to see the freight trends over the last 12 months. It shows the average order size according to shipments, freight cost as a % of total spend, the amount the customer paid in freight, and the amount that would have been charged in freight that Allegion covered as part of free freight shipments.



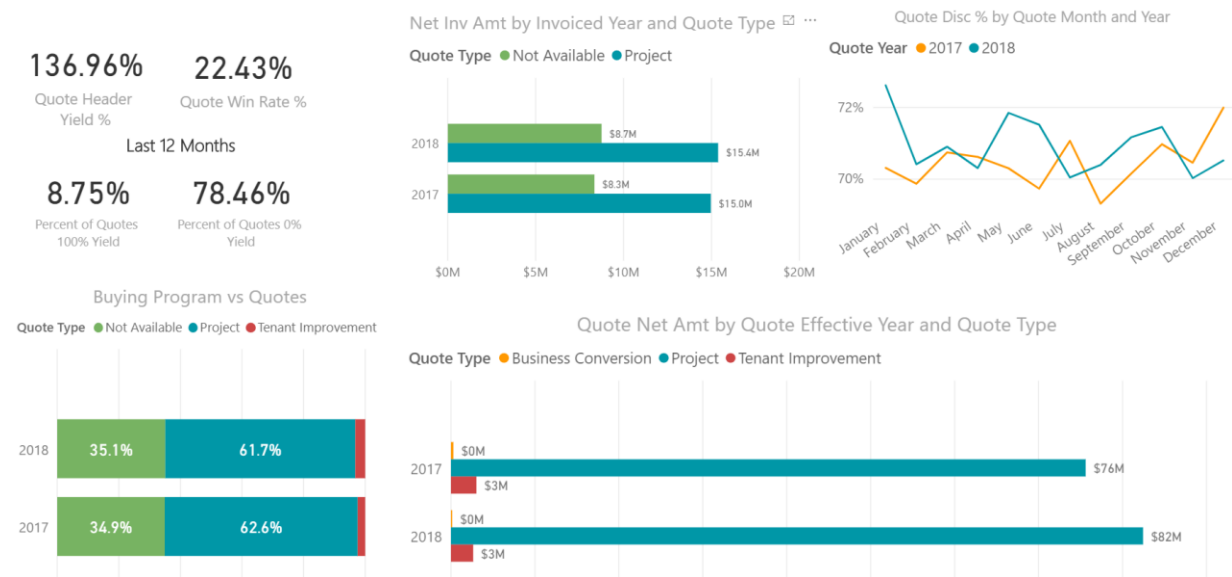
## On Time to Promise Report

The On-Time to Promise Report allows you to see how frequently purchase orders were being shipped on time according to the promise date on their acknowledgement. You can see an on-time percentage and an Average Days Past Due which aggregates all of the days either before or after a promise date on all orders and takes a single average of all of those "Days Past Due" values. You can also see what percentage of orders fall into each of the past due buckets.



## Quotes Report

The quotes report provides aggregate quote metrics based on sales and quote amounts over the last 12 months.



## Engagement Report

This report shows all of the survey responses that users at an account have filled out after a case (service request) has been completed. You can see the number of responses and how Allegion customer care is performing on the 3-main metrics that we ask in our surveys. You can all see the latest comments provided in the surveys.

