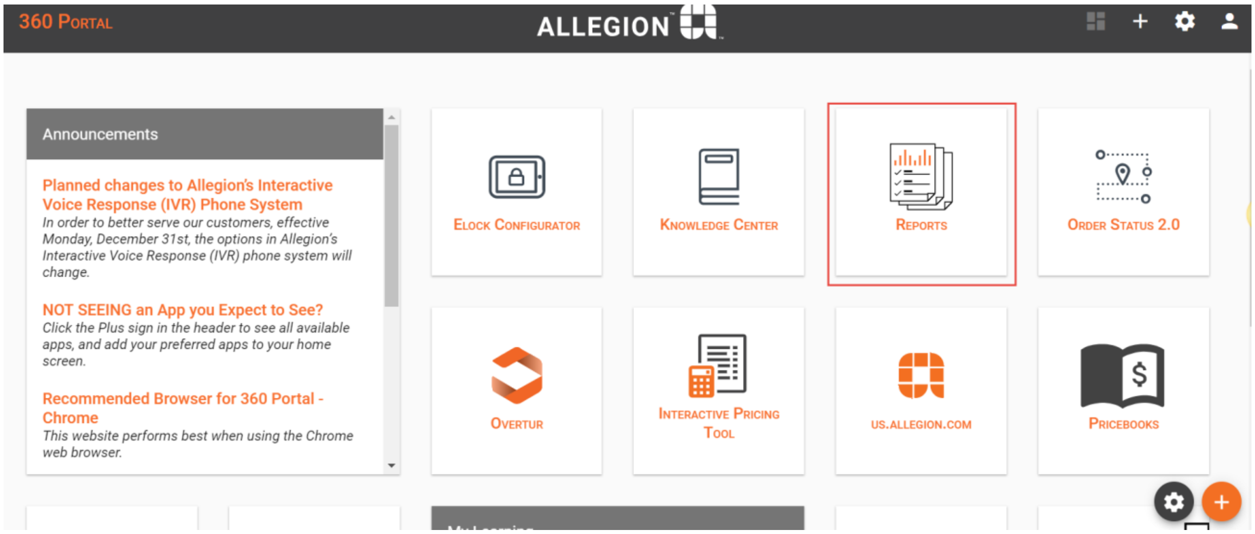
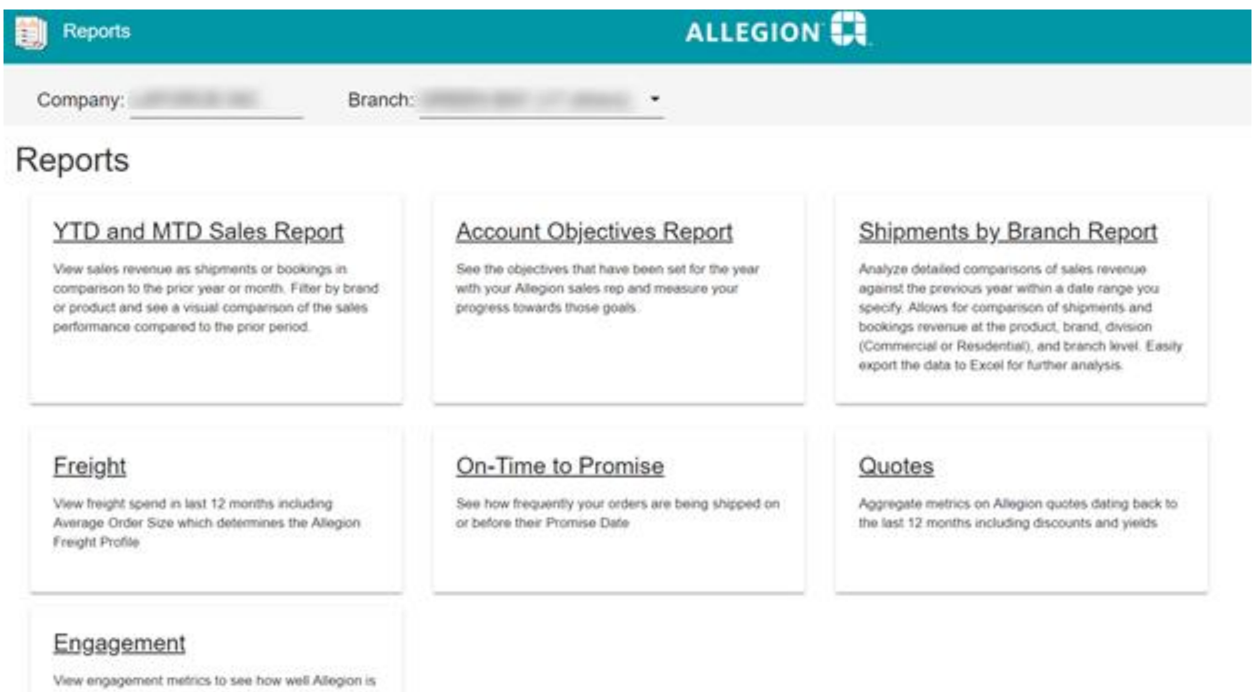
Allegion 360 Portal

Tips for using the Reports Application

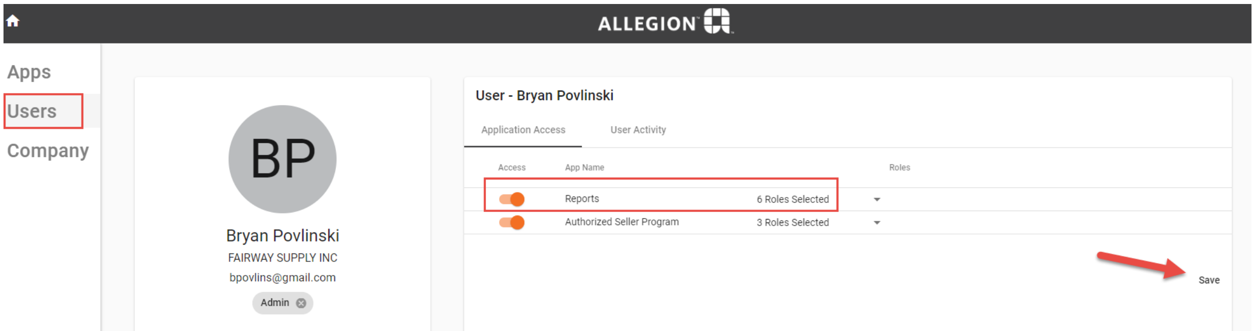


Available Reports



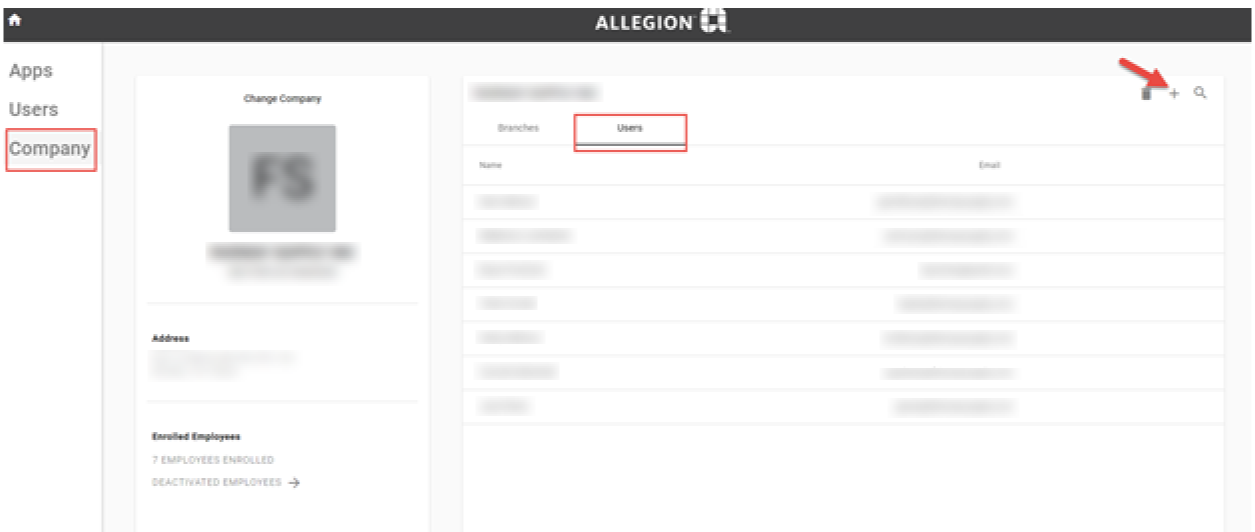
The reports app has 7 reports available at launch, but this list will be dynamic and will eventually be sorted into categories as we add more reports. To grant access to these reports the Company Admin (external admin user) will need to grant individual users branch access and access to the Reports app (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



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

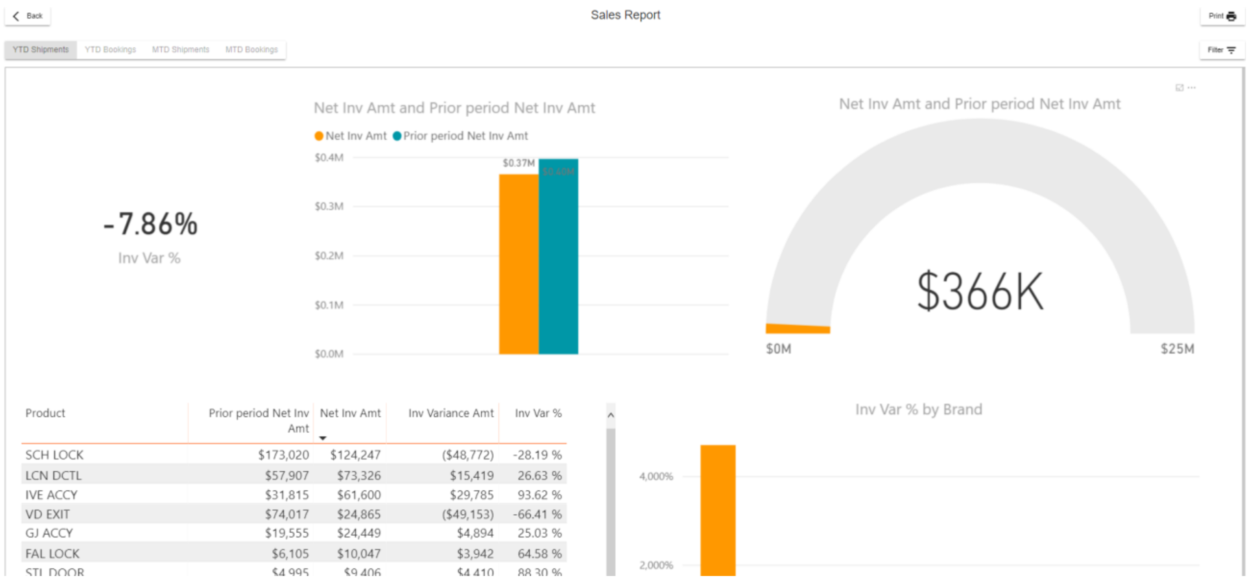


Branch access will determine which branches show up in the branch selection box for a user. If they don't have access to a branch they won't see it in the selection box and won't be able to view any reports for that branch.

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.

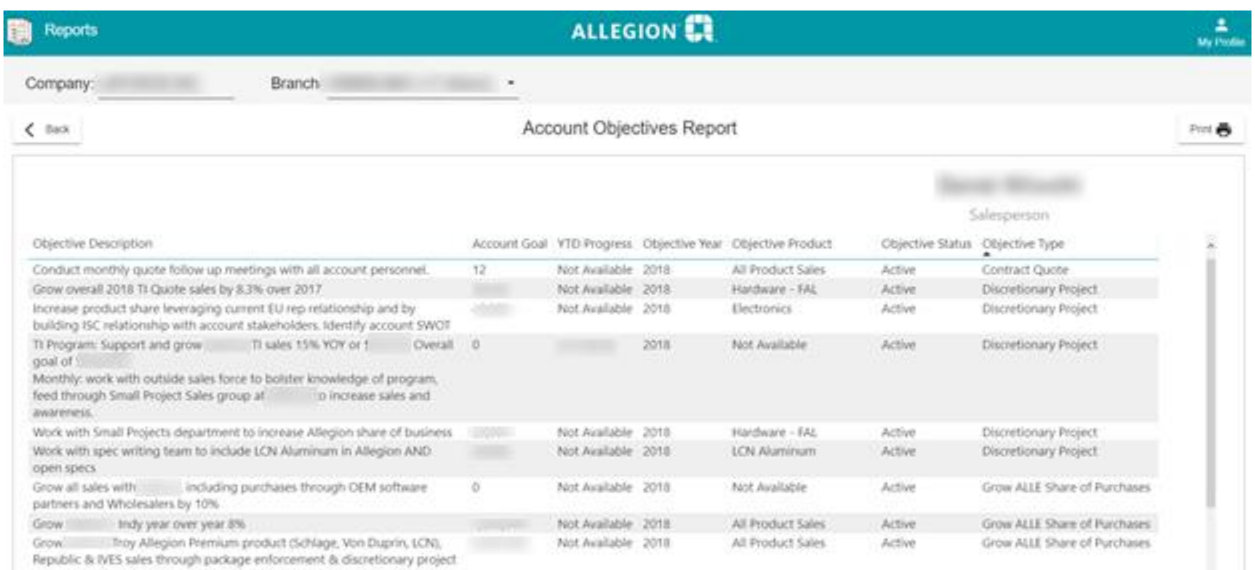
YTD and MTD Sales Report

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



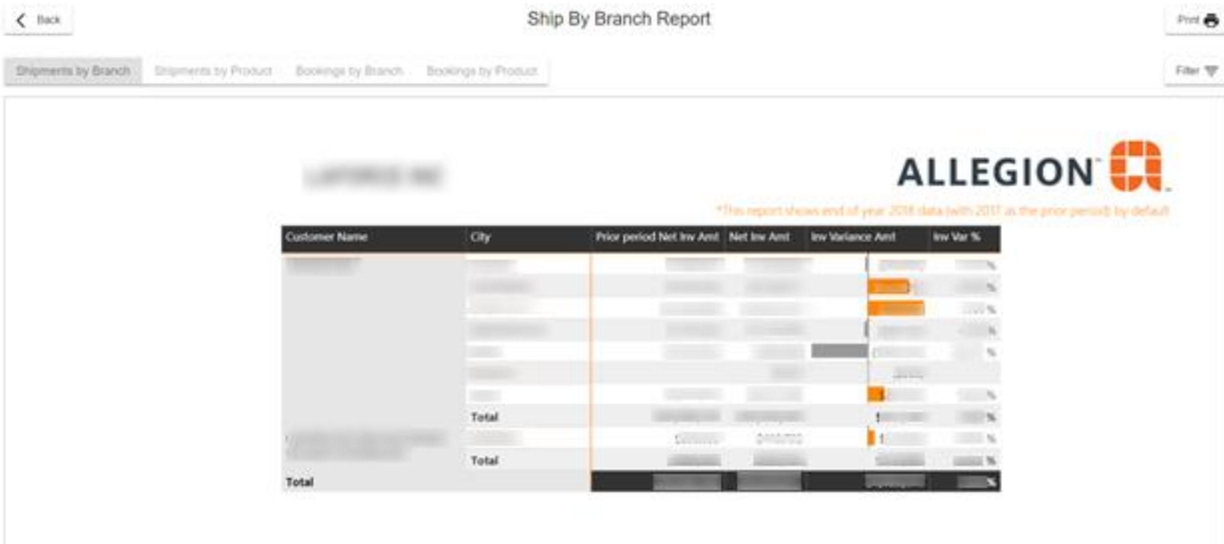
Account Objectives Report

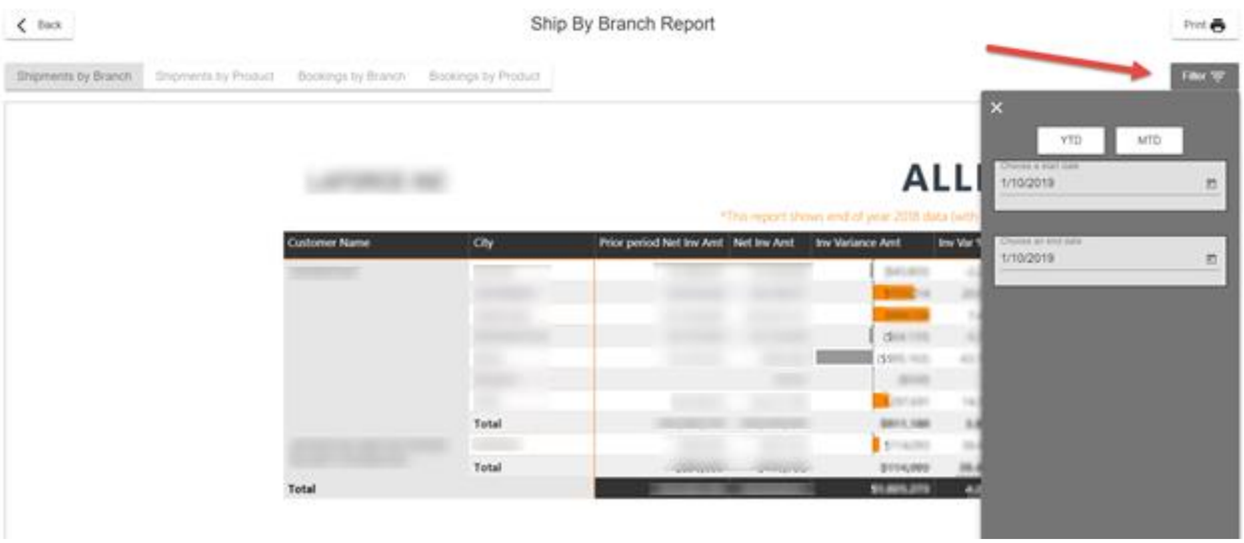
This report shows all account objectives established between the customer and the salesperson in the current year.



Shipments by Branch Report

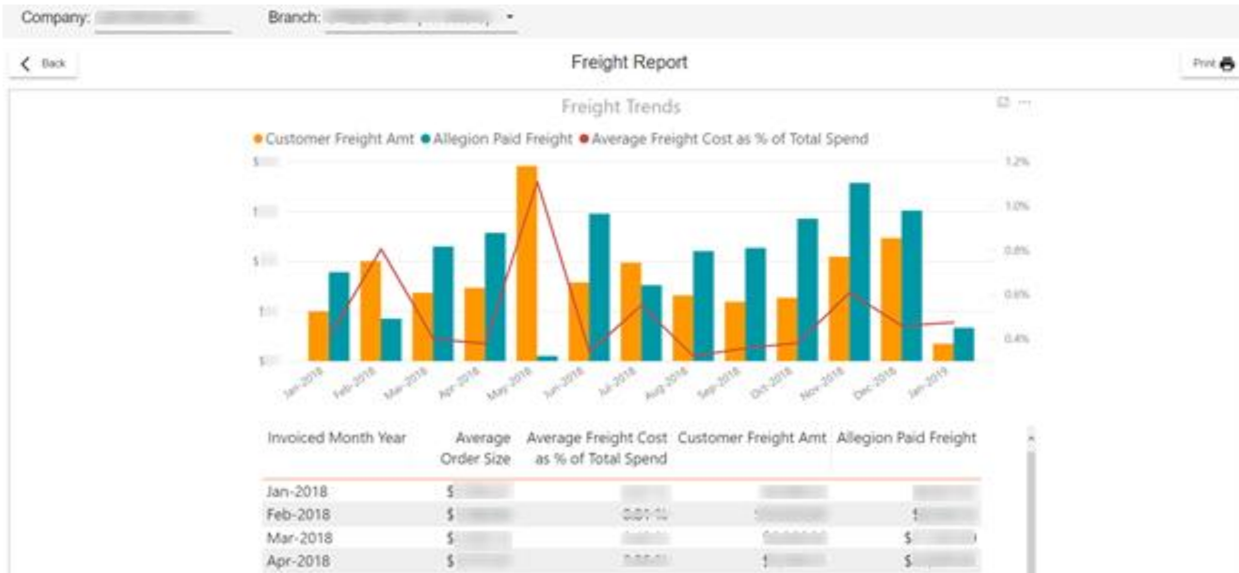
This report allows you to customize the date range you'd like to see in the current year and compare the data to the same period in the previous year. Clicking on Filter in the top right gives you a start date and end date selector. There are tabs to select a branch view or a brand/product level view.





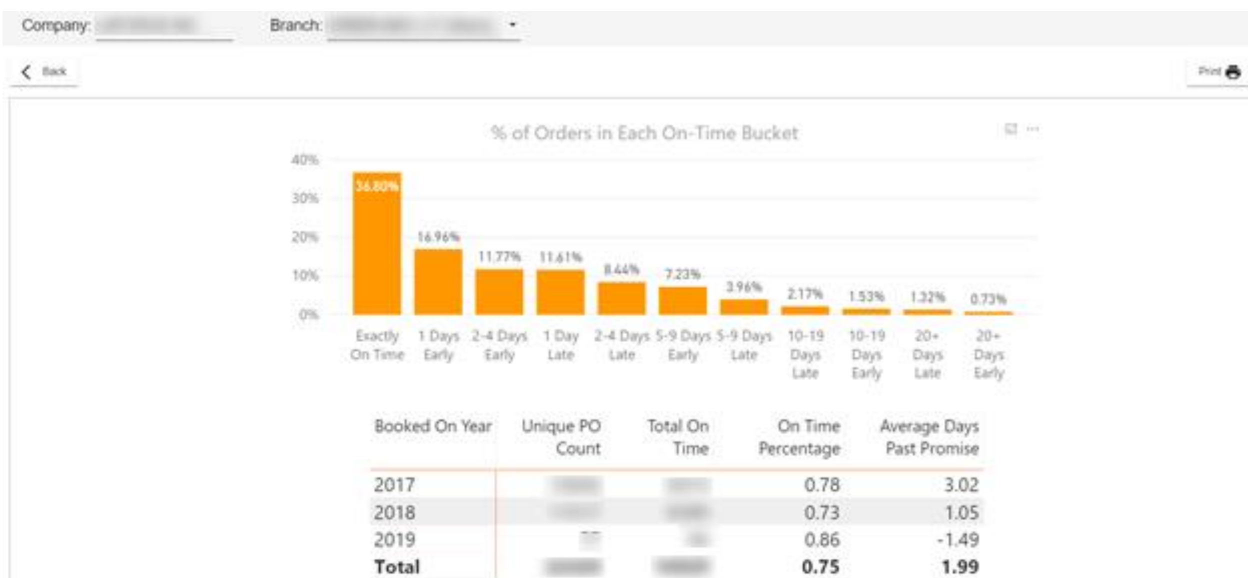
Freight Report

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.



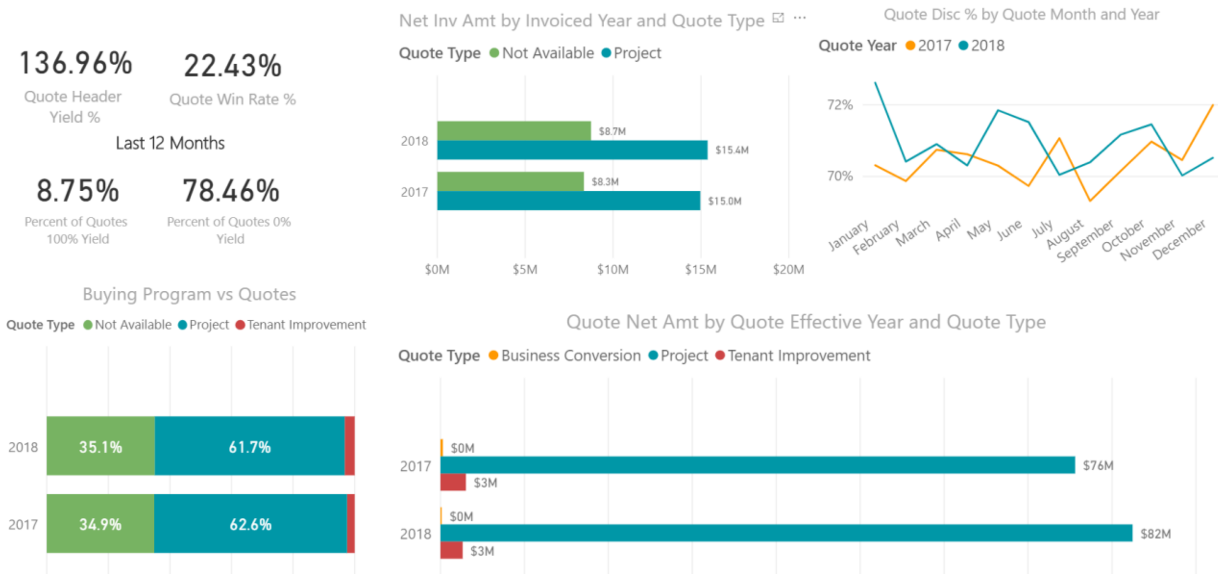
On Time to Promise Report

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.