

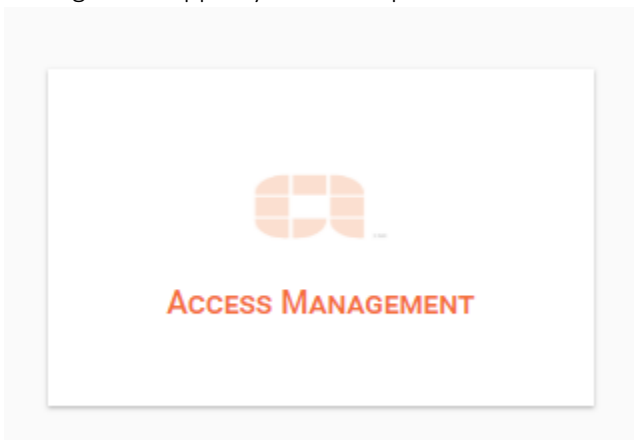
Allegion 360 Portal

Tips for using the Access Management Application.

The Access Management app is intended for the following purposes:

- Invite new users to create a 360 Portal profile
- Associate users with branches
- Grant users access to the Reports app
- Grant users access to the Quote Dashboard app
- Grant Admin status to users
- Block or delete users

To use the Access Management app, you'll need to be a designated 360 Portal admin user and add the Access Management app to your launchpad.

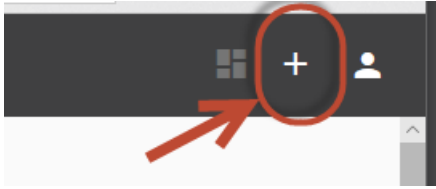


Access Management app

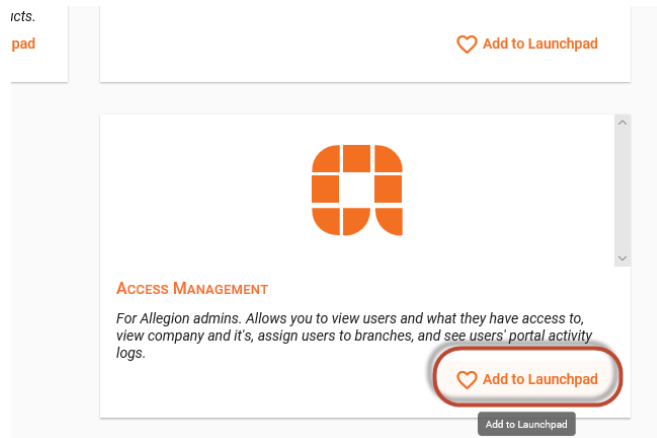
Each company should have at least one admin user. To request admin permission for a user, email: myallegion.support@allegion.com

How to add the Access Management app to your launchpad

1. Add the Access Management App to your launch pad by going to the Apps & Widgets store. Then, find the app and click add to launch pad.



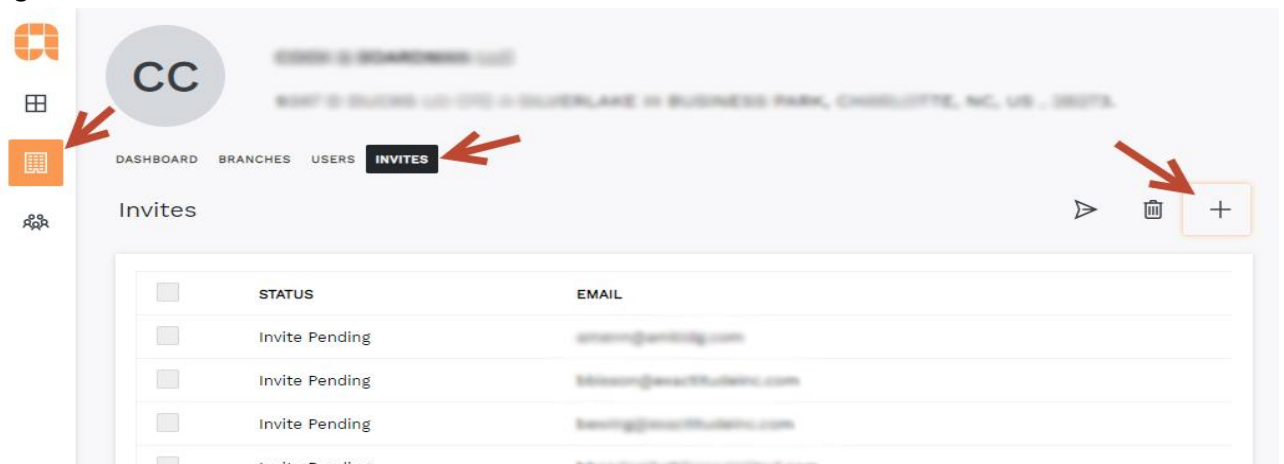
App & Widget Store



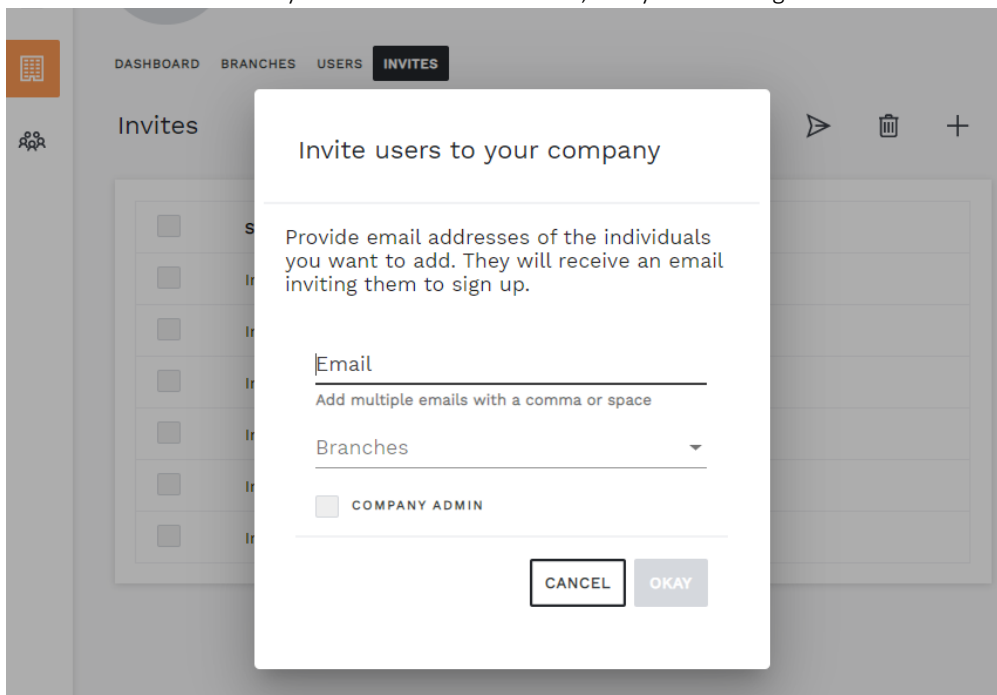
Add the app to your Launchpad

How to invite new users to the 360 Portal:

1. To invite new users, go to the Companies icon on the left, then click on the INVITES tab, then on the Plus sign:



2. Enter the email address(es) of the user(s) you wish to invite. If you are only inviting one user at a time, you can select one or more Branches they should be associated with, and you can designate this user as a Company Admin.



NOTE: Once this is submitted (when you click Okay), the user will receive an email. In that email will be a link to Sign Up. Clicking that link will take them to the 360 Portal where they can create their account by clicking the "Create profile" option. Once completed, they will be associated with the correct company, and where applicable, with the branch and admin access specified in the above steps.



You're invited to Allegion Portal

"You've been invited to create an Allegion Account."

-Allegion

SIGN UP

Allegion has invited you to join Allegion Portal an Allegion application. Get started by pressing the sign up button above. If you believe you are receiving this email by mistake, please disregard this email.

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360 Portal invitation email

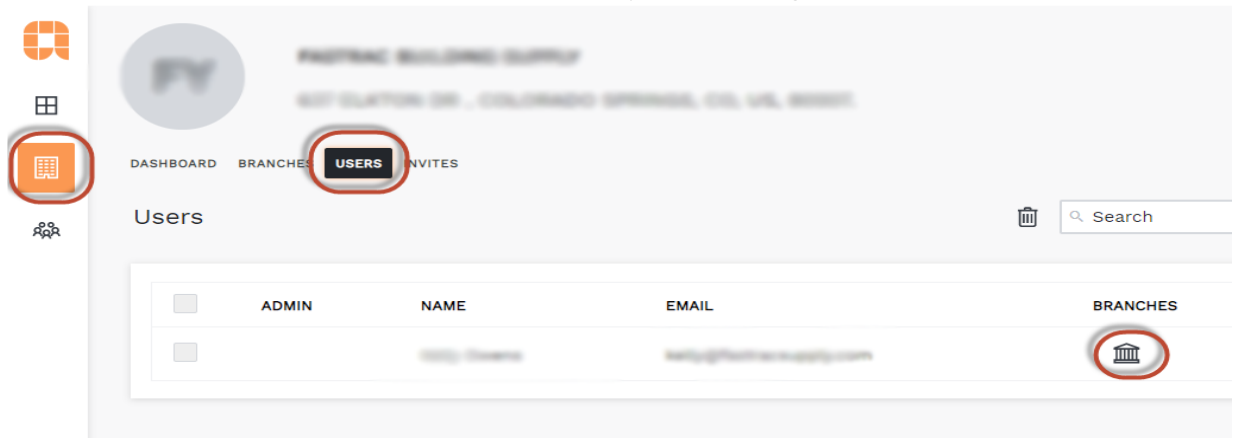
How to grant access to apps for your users:

1. Admin users must grant branch access to allow users to access the **Reports app** and **Quote Dashboard App**.
 - a. To grant access to the Reports or Quote Dashboard apps, a user must first have access to one or more branches of their company.

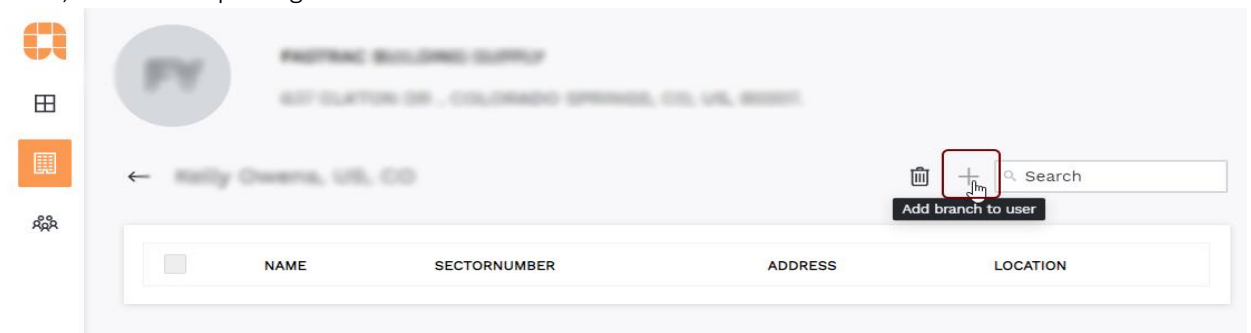
Here's how to grant branch access to a user:

You can do it two ways. Add user(s) to a branch, or add branch(es) to a user.

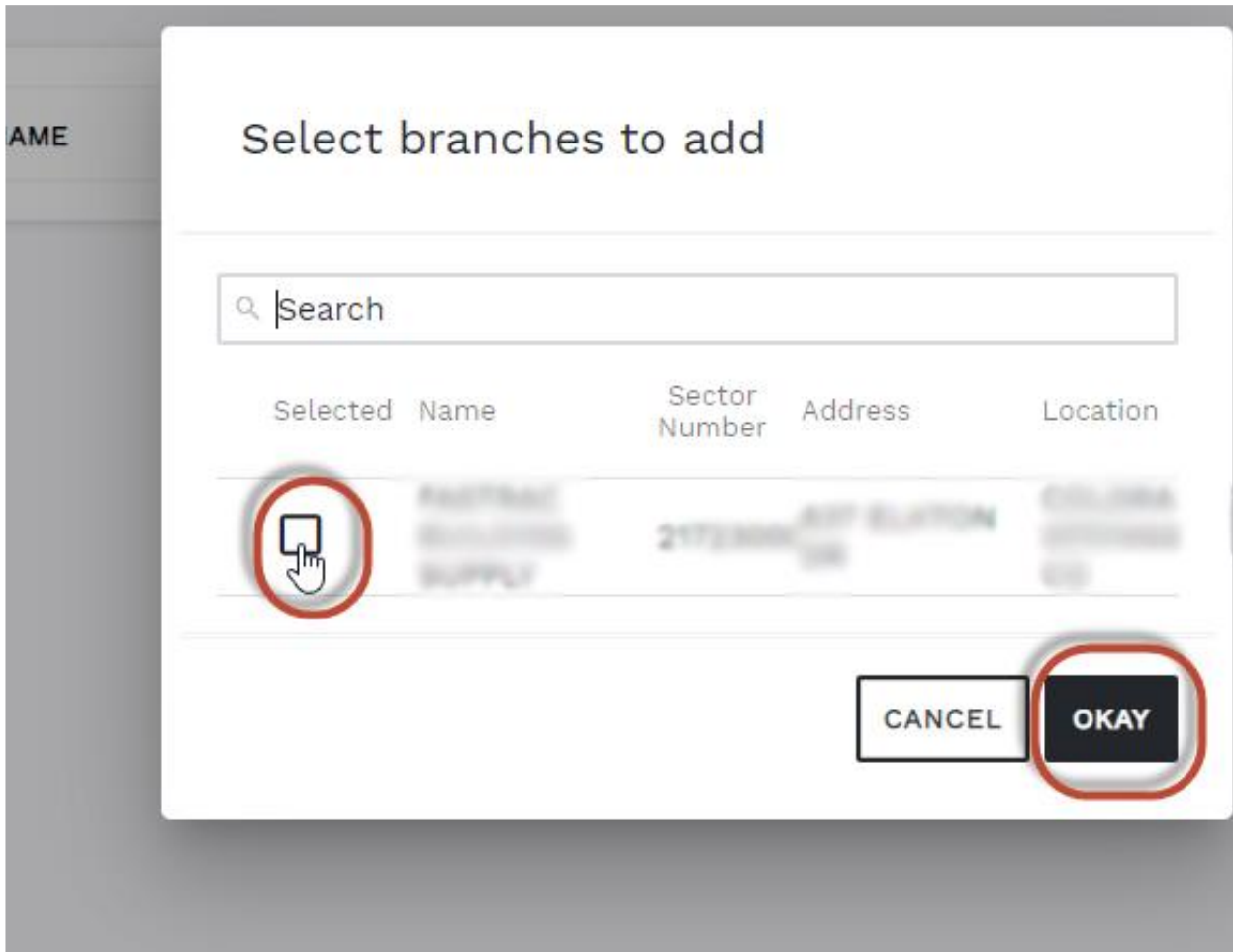
1. **To add branch(es) to a user...** In the Access Management app, go to Companies, then choose the USERS tab, then click on the Branches icon next to the user you're working with.



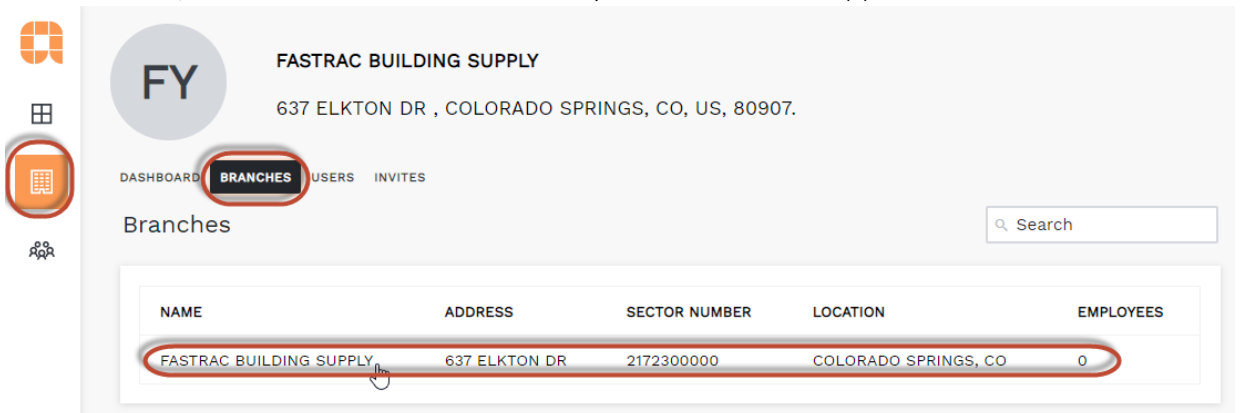
Next, click on the plus sign next to the search box to add one or more branches to the user.



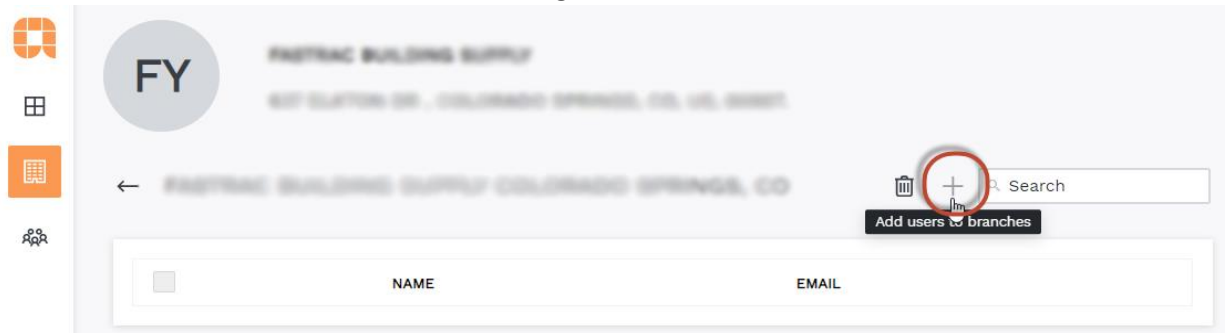
Click the checkbox next to one or more available branches, then click OKAY, to add the branch(es) to the user..



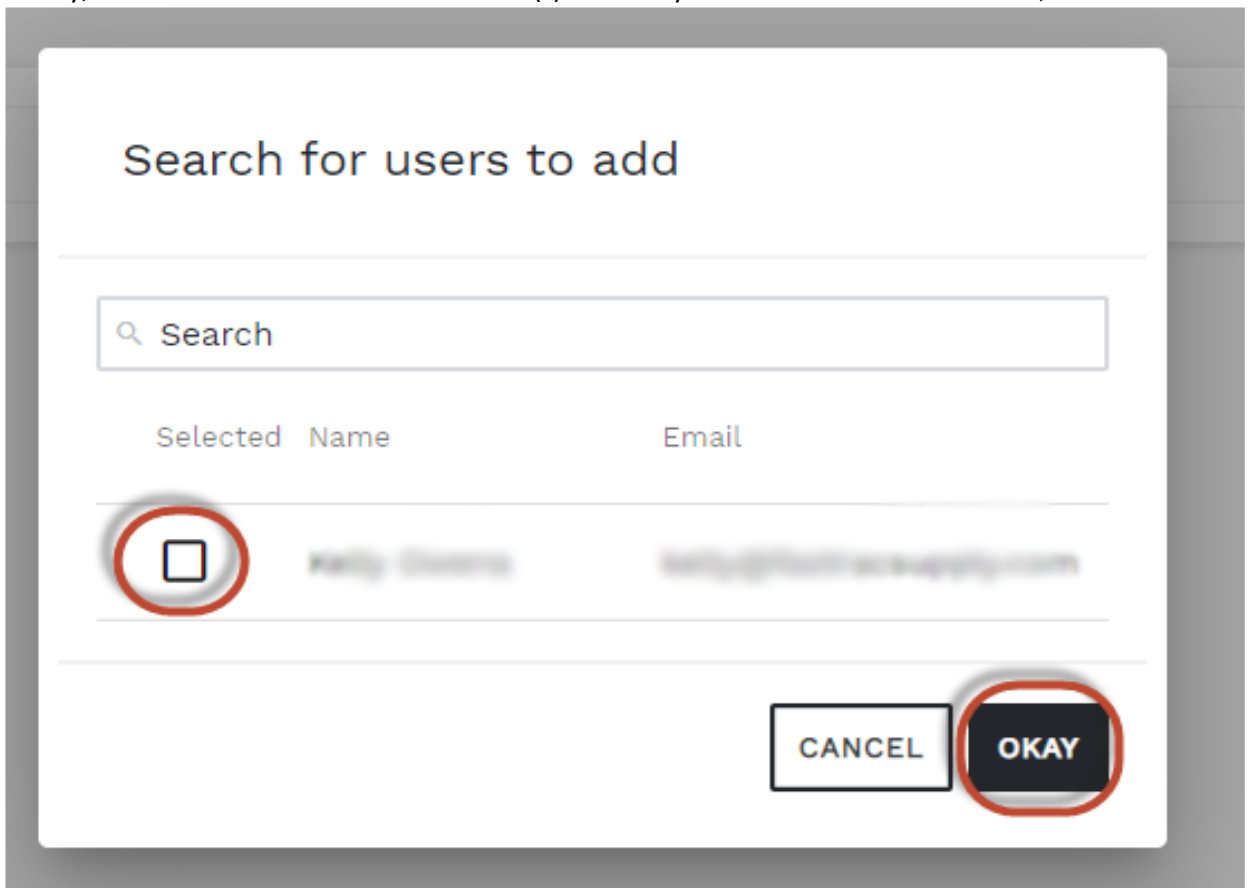
2. To add user(s) to a branch... In the Access Management app, go to Companies, then choose the BRANCHES tab, then click on the Branch to which you want to add user(s).



Next, click on the Add users to branches Plus sign near the search box.



Finally, checkmark the box next to the name(s) of those you want to add to this branch, and click OKAY.

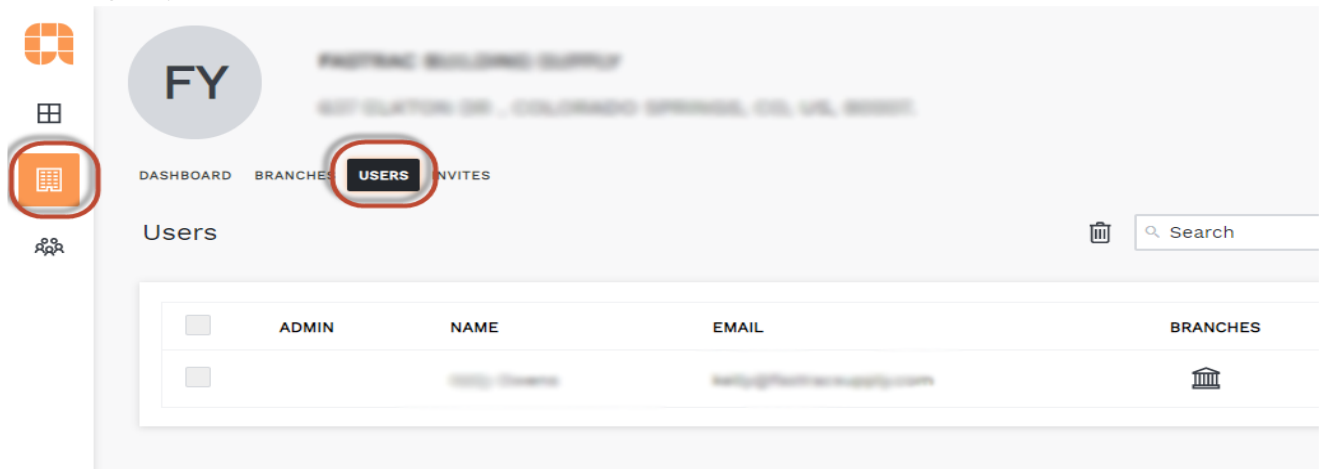


The user(s) can now see data within the Quotes Dashboard and Reports App

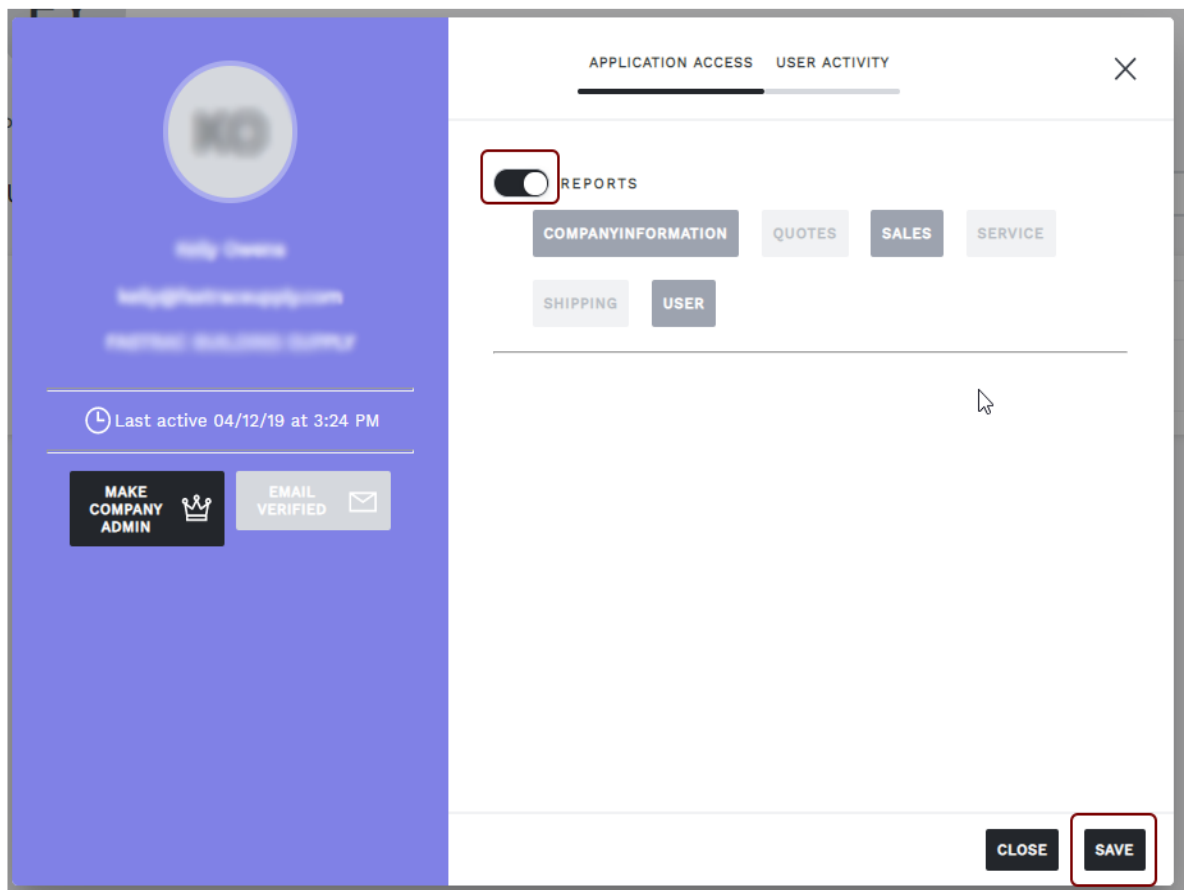
How to grant access to specific reports in the Reports app:

NOTE: The Reports app has granular roles where you can grant a user access to certain groups of reports like Sales, Shipping, or Quotes. See, How to grant access to specific Reports below.

1. Go to the Companies section, then click on USERS tab, then click on the name of the person for whom you want to manage reports access.

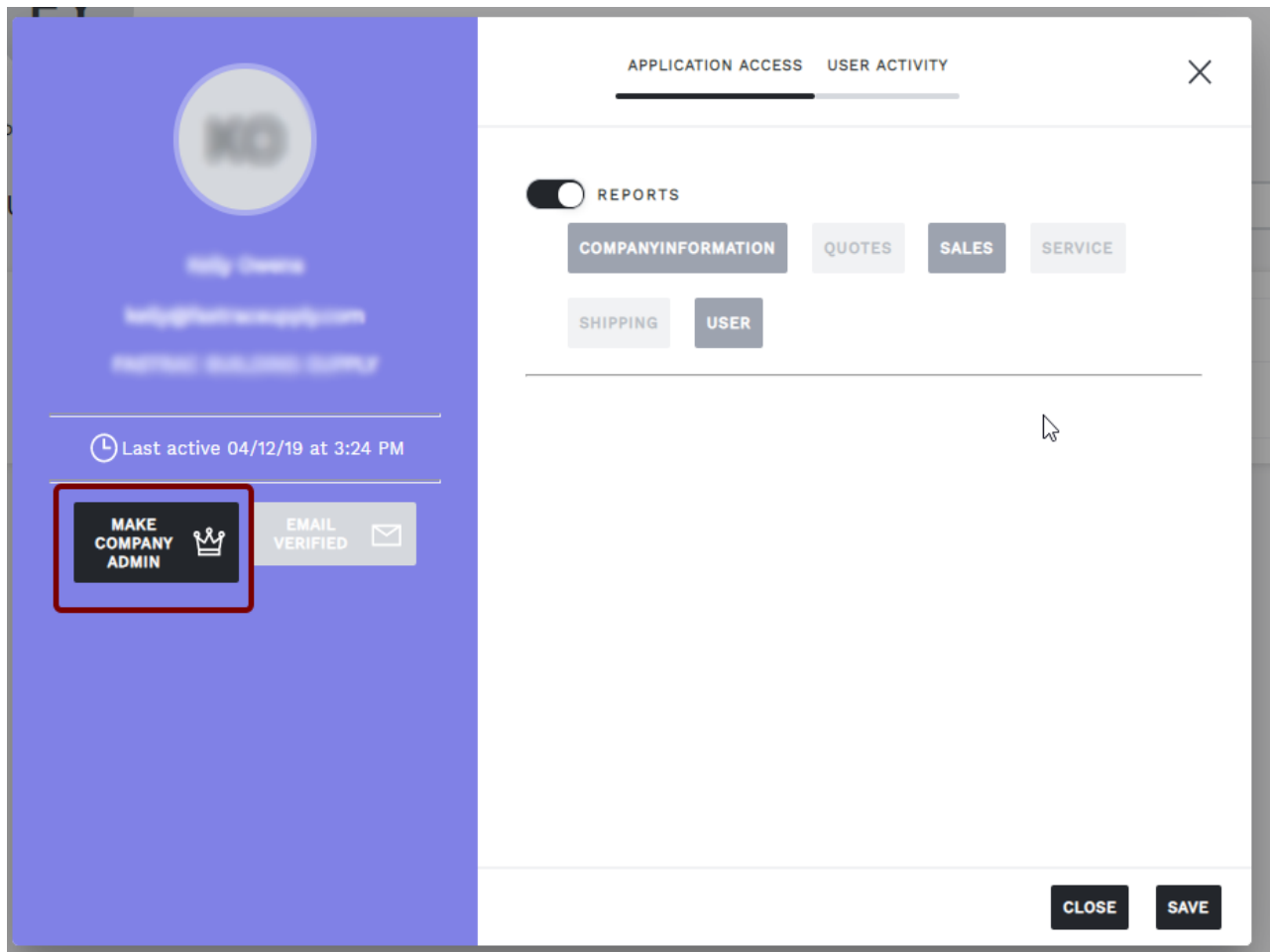


2. Click on the toggle next to Reports. Then, select the individual reports to which they should have access. Finally, be to **click the SAVE button**.



How to make a user and Admin user

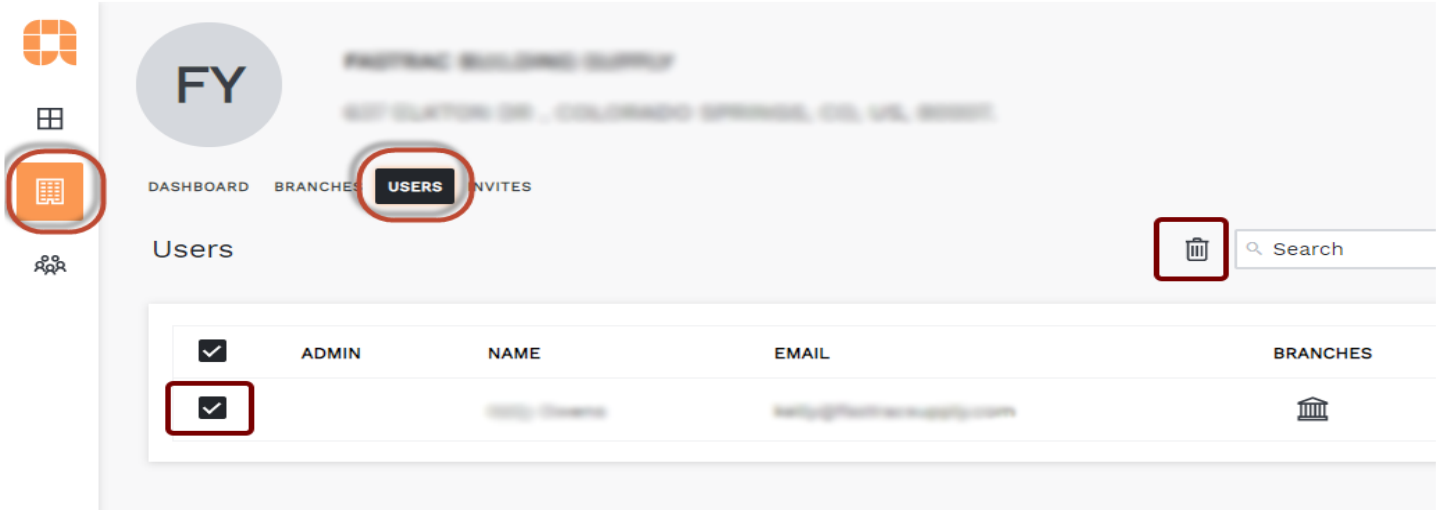
1. To make another user an admin user, you will need to click the MAKE COMPANY ADMIN button in their user profile. They will then be able to access the Access Management app and administer other users in your company



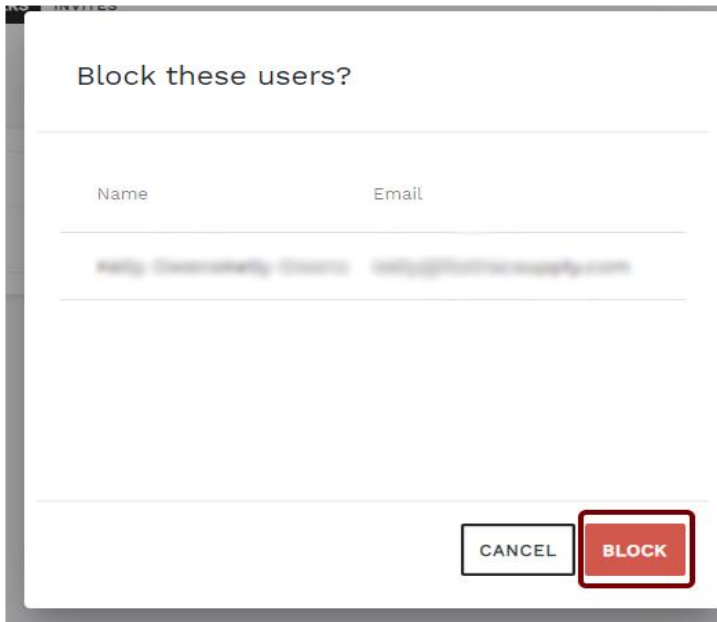
How to block or delete a user:

1. Block a user

- Select Companies on the left, then select the USERS tab.
- Then, check the box next to the user(s) you want to block or delete. Then, click the trash can icon.



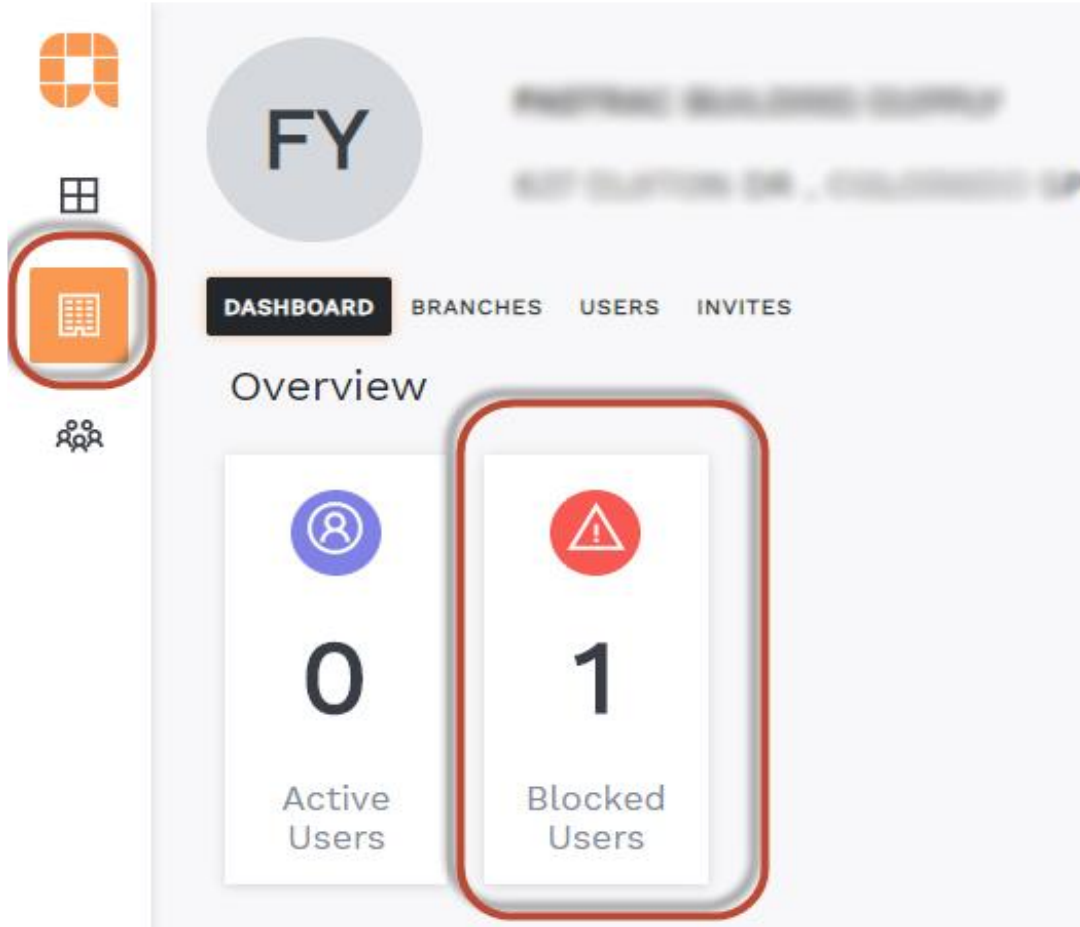
- Finally, click the BLOCK button to confirm. This blocks the user from access, but does not delete their account.



To delete a user, they must first be blocked, then you can proceed to the next step.

2. Delete a user (must first be blocked)

- Select Companies on the left, then click the Blocked Users box.



- b. Check the box next to the user you want to delete, then click the trash can icon. Finally, click DELETE to confirm.

