RESIDEO REPORTING GUIDE

2021

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Incentives Manager,
Resideo Pro PERKS Loyalty Program

BENEFITS TO YOUR ORGANIZATION

With your data, Resideo can provide better support to you and your customers.

Contractors are rewarded for purchasing qualifying Resideo products

- With Point-of-Sale data, Resideo will award loyalty points to contractors (based on their purchases through your organization) which, in turn, drives loyalty to your business

Data becomes actionable

- With Point-of-Sale data, your organization can work strategically with your Resideo Sales Rep to drive sales downstream
- With Inventory data, Resideo can gain visibility into the supply chain and will be better positioned to serve you with product availability

Single collection point for data submitted to Resideo*

- Standardized format
- Minimized human intervention as much as possible

Providing the point-of-sale data as requested may eliminate the need for any additional reporting as the data is leveraged internally across our teams.

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REPORTING PROCESS

Submit data:

✓ on a monthly basis

✓ in a safe and secure database

✓ via a single data submission process

E2**OPEN**®

Drill Down

- Data Being Collected

- Data Submission Requirements
    - Format
    - Frequency
    - Number of Files to be Submitted
    - File Naming Convention

- Data Submission Options

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DATA BEING REQUESTED

1. Branch Directory

Branch Location details required one time for set up
(only applies to Distributors with more than 1 location)

2. POS

- Distributor Name & Warehouse Location Details

- Purchase Details: SKU#, Unit Cost, Total Amount

- Contractor Name, Address & Loyalty Program # (CPRO #)

- POS Details: Invoice #, Date Sold, SKU#, Qty, Unit Price,
  Total Amount, Currency

  We will also request a 1-year Historical Data file
  (to be used in next year's loyalty program calculations).

3. Inventory

Inventory Details: Inventory Snapshot Date, Qty Available,
Qty Allocated, Average Cost per Unit

**All data submitted shall not include any personally identifiable information.
An NDA is available and can be obtained from your Resideo Sales Rep.**

Resideo will use this data to:

- Execute on our Loyalty Program

- Drive additional sales through your business

- Improve our internal processes

Use the Resideo Reporting Template to help you accurately map your data fields.

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DATA SUBMISSION REQUIREMENTS

Format: Machine-Readable
- With separate column headings that match the template format
- In specified file format: Excel, CSV or Flat File (CSV, Pipe delimited)

Note: Columns can be re-ordered, but please do not delete any columns.

Frequency: 10am CST on the 7th business day of each month

Point-of-Sale: The Point-of-Sale data should be for the entire month and submitted at 10am CST on the 7th business day of each month.

Inventory: The inventory snapshot should be taken as of the last calendar day of each month and submitted at 10am CST on the 7th business day of each month.

Holidays: When the submission deadline falls on a holiday, Resideo will consider the day following the holiday as the due date.

Expected Number of Files to be Submitted Monthly: 2
1. POS file from your company
2. INV file from your company

January 2021
Point-of-Sale Report
Due Date: February 9th

FEBRUARY 2021						
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Reporting is due
at 10am CST
on the 7th business day
of each month

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HOW TO SUBMIT YOUR DATA

1. Email to **submit_resideo@e2open.com**

2. Upload into E2open Portal
   Gain complete visibility into your data submissions
   (and it's free!)

3. Upload to E2open's secure FTP site
   (requires individual Distributor's FTP account creation)

Submission options listed above are to be used **after** your test POS and INV data file(s) have been reviewed and accepted by E2open. Once you have received a "clear to send notice" from E2open, you can submit your monthly POS and INV reports via one of these options.

You choose your preferred submission method.

Within E2open Portal*, you can:

- Submit Point-of-Sale and Inventory data directly
- View and track processed submissions
- Receive system alerts re: status of file processing

*Separate registration is required.

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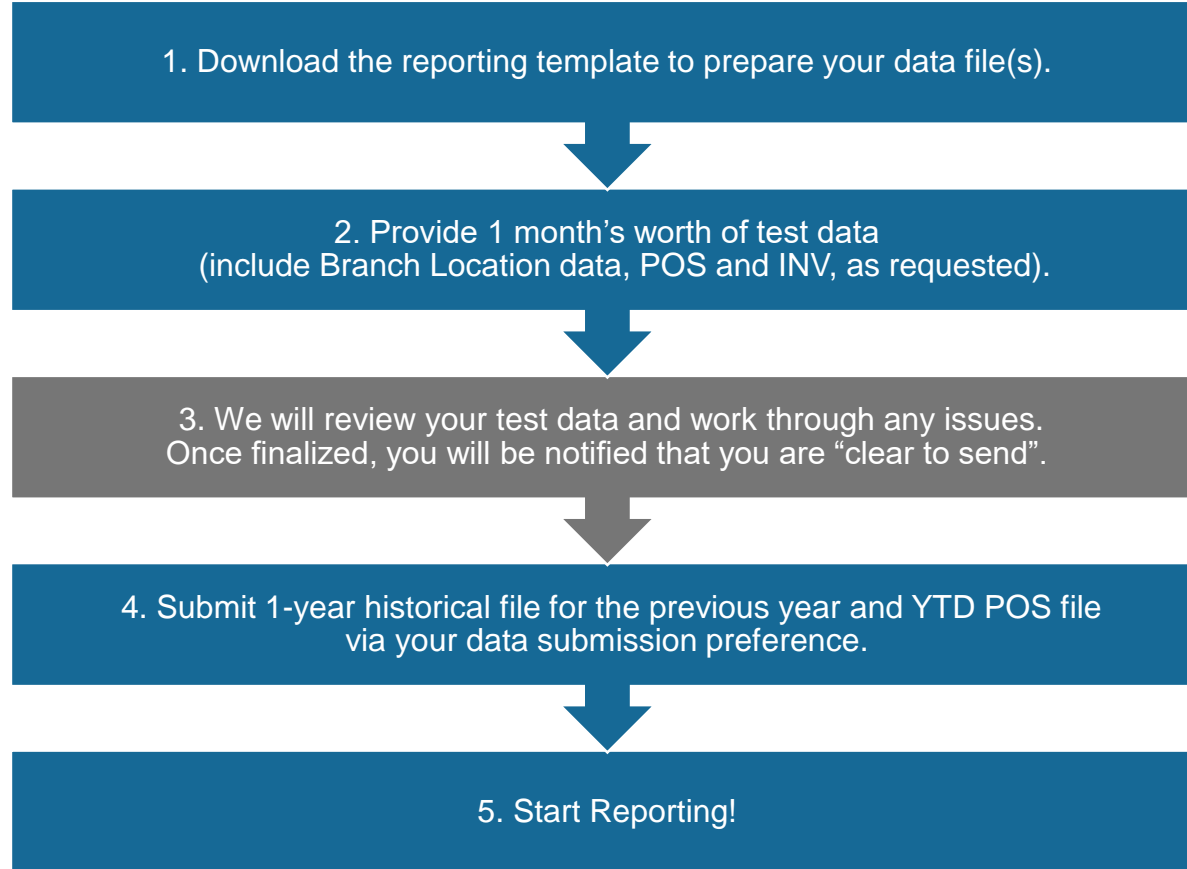# E2open Portal

Notifications

User Profile Settings

App Drop Down List

Feed List & Details

Action Tool Bar

E2OPEN

☰ Menu

Home ⟩ Data Services ⟩ Feeds In ⌄ ⟩ Submitted Files ⌄

⊕ Filters   ① Feed In ID *in* 260401;260442;261103;261445;262044;262045;262070   ✕   Saved Filters [Load a saved filter... ⌄] [Save]

Feeds Received (Submitted) 7 records - page 1 of 1   [Load a saved view... ⌄] [Save] ⬆ 🗑 ↻ ⚙

☑	Received Date Time	Received From	Partner Code	Partner Name	Feed Type	Feed Grade	Original File	Extracted File	File Size	Status	Processing St...
☑	08-Nov-2018 20:56:29	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	a_Logitech_FM_U...	2018_11_08_092...	15 KB	Processed wit...	
☐	08-Nov-2018 15:49:34	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	a_Logitech_FM_U...	2018_11_08_042...	10 KB	Processed wit...	
☐	08-Nov-2018 15:49:34	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	a_Logitech_FM_U...	2018_11_08_042...	10 KB	Processed wit...	
☐	30-Oct-2018 17:12:11	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	Logitech_FM_Upl...	2018_10_30_064...	12 KB	Processed	
☐	26-Oct-2018 21:37:17	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	Logitech_FM_Upl...	2018_10_26_110...	12 KB	Processed	
☐	25-Oct-2018 17:37:37	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	Logitech_FM_Upl...	2018_10_25_070...	12 KB	Processed	
☐	25-Oct-2018 15:48:13	PartnerCode21.ftp	PartnerCode21	PartnerName21	Sales	B	Logitech_FM_Upl...	2018_10_25_051...	12 KB	Processed	

[Overwrite] [Transactions] (16 selected)   ‹ [1] › [Go to page] [Go]

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WHAT'S NEXT FOR YOU?

TODAY

1. Download the reporting template to prepare your data file(s).

5 DAY

2. Provide 1 month's worth of test data
(include Branch Location data, POS and INV, as requested).

10 DAY

3. We will review your test data and work through any issues.
Once finalized, you will be notified that you are "clear to send".

12 DAY

4. Submit 1-year historical file for the previous year and YTD POS file
via your data submission preference.

14 DAY

5. Start Reporting!

Test data can be submitted to query_resideo@e2open.com.

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HELPFUL HINTS

File Naming Convention for initial test data files sent to query_resideo@e2open.com

1. **Branch Directory file name:** Distributor_Name_Branch_Directory_2021
   (only applies to Distributors with more than 1 location)

2. **Point-of-Sale file name:** Distributor_Name_POS_202101

3. **Inventory file name:** Distributor_Name_INV_202101

File Naming Convention for your production files (i.e., after you are "clear to send") to be submitted via your preferred reporting method

- **2021 YTD file name:** Distributor_Name_POS_YTD_2021

- **2020 Historical Point-of-Sale file name:** Distributor_Name_Historical_2020

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QUESTIONS?

We are here to help you.
If you have any questions, please ask!

YOUR TEAM

- Your Resideo Sales Representative

- Cynthia Penrod - Incentives Manager
cynthia.penrod@resideo.com

- Audra Bartell – Sr. Sales Operations Analyst
audra.bartell@resideo.com

E2open Points of Contact:

- Jay Trivedi - Program Manager
jay.trivedi@e2open.com

- OnBoarding Team – Questions and Test Files:
query_resideo@e2open.com