Agent Training 2.2
Data Imports via CSV -Agent Admin

Agent Training 2.2
Data Import via CSV – Agent Admin

Refer to Agent Training 2.1 for information that accompanies this CSV import guide.

To manually upload property data into your Sensor portal, you will need to export from your current system into the standard .csv template so it can be uploaded into Sensor.

This guide is to help explain what data is required in a .csv file format.

You will need to be able to run a report from your current system into this .csv format when you want to update your Property information in the Sensor Agent Portal.
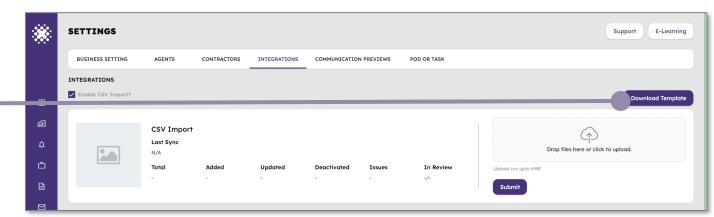
BEFORE YOU START:
Once you have imported your first file, you MUST NOT change the identification data for that property: that means
• PROPERTY_GUID,
• PROPERTY_ID, and
• PROPERTY ADDRESS must NEVER be changed.

If this data is modified it may create duplicate records, or overwrite existing properties in your Sensor database.

DOWNLOAD TEMPLATE
Each row will contain the relevant data for one property.

We'll break the columns into workable portions.

SETTINGS

| BUSINESS SETTING | AGENTS | CONTRACTORS | INTEGRATIONS | COMMUNICATION PREVIEWS | POD OR TASK |

Support   E-Learning

INTEGRATIONS

☑ Enable CSV Import?

Download Template

CSV Import
Last Sync
N/A

Total	Added	Updated	Deactivated	Issues	In Review
-	-	-	-	-	-/-

Drop files here or click to upload.

Upload csv upto 5MB

Submit

Agent Training 2.2
Data Import via CSV – Agent Admin

1. PROPERTY INFORMATION

THIS DATA SHOULD NOT BE CHANGED AFTER IMPORT

PROPERTY_GUID is a unique identifier created by your CRM/PM Software

PROPERTY_ID is a unique ID per property that your agency allocates (and it can be the same as the PROPERTY_GUID)

PROPERTY_ADDRESS must contain Address (unit number/street number), street name, suburb, state, postcode. If you need to combine fields from your system, all attributes of the address need to be in the order described above.

2. AGENT INFORMATION

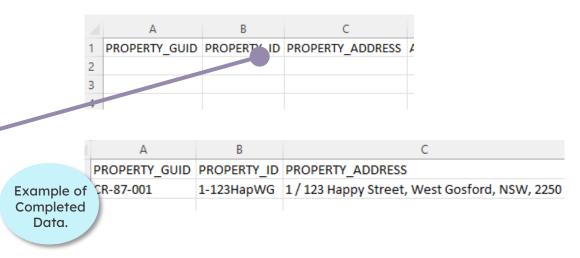AGENT_NAME is the name of your agent, normally First Name Last Name

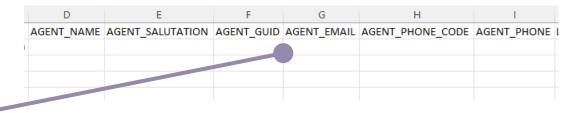AGENT_SALUTATION is the name the agent wants to be called

AGENT_GUID is a unique identifier for each agent created by your software.

AGENT_EMAIL is the individual email address per agent

AGENT_PHONE_CODE is the country code for the phone number (Australia is 61)

AGENT_PHONE is the phone number without the leading zero and without spaces

	A	B	C
1	PROPERTY_GUID	PROPERTY_ID	PROPERTY_ADDRESS
2			
3			
4			

A	B	C
PROPERTY_GUID	PROPERTY_ID	PROPERTY_ADDRESS
CR-87-001	1-123HapWG	1 / 123 Happy Street, West Gosford, NSW, 2250

Example of Completed Data.

D	E	F	G	H	I
AGENT_NAME	AGENT_SALUTATION	AGENT_GUID	AGENT_EMAIL	AGENT_PHONE_CODE	AGENT_PHONE

D	E	F	G	H	I
AGENT_NAME	AGENT_SALUTATION	AGENT_GUID	AGENT_EMAIL	AGENT_PHONE_CODE	AGENT_PHONE
Jennifer Citizen	Jenny	CR-AG010	jenny.citizen@youragency.com.au	61	400 000 000

Example of Completed Data.

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3. LANDLORD (ASSET OWNER) INFORMATION

LANDLORD _GUID is a unique identifier for each asset owner created by your software.

LANDLORD_NAME is the name of the asset owner, normally First Name Last Name
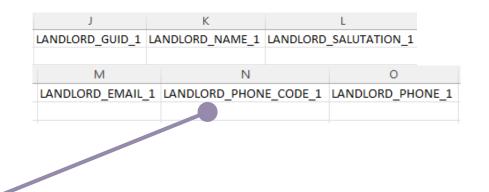
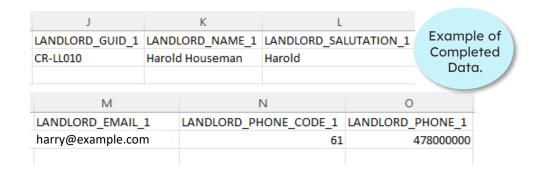LANDLORD _SALUTATION is the name asset owner wants to be called

LANDLORD _EMAIL is the individual email address per asset owner

LANDLORD _PHONE_CODE is the country code for the phone number (Australia is 61)

LANDLORD _PHONE is the phone number without the leading zero and without spaces

There is space on the sheet to add a second and third landlord (columns P to AA). Leave blank if not required.

J	K	L
LANDLORD_GUID_1	LANDLORD_NAME_1	LANDLORD_SALUTATION_1

M	N	O
LANDLORD_EMAIL_1	LANDLORD_PHONE_CODE_1	LANDLORD_PHONE_1

Example of Completed Data.

J	K	L
LANDLORD_GUID_1	LANDLORD_NAME_1	LANDLORD_SALUTATION_1
CR-LL010	Harold Houseman	Harold

M	N	O
LANDLORD_EMAIL_1	LANDLORD_PHONE_CODE_1	LANDLORD_PHONE_1
harry@example.com	61	478000000

Note: Landlord 1 is the only person that will be sent communications generated from the Sensor portal.

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4. TENANT INFORMATION

TENANT _GUID is a unique identifier for each tenant created by your software.

TENANT_NAME is the name of the tenant, normally First Name Last Name

TENANT _SALUTATION is the name tenant wants to be called

TENANT _EMAIL is the individual email address per tenant

TENANT _PHONE_CODE is the country code for the phone number (Australia is 61)

TENANT _PHONE is the phone number without the leading zero and without spaces

There is space on the sheet to add a second tenant (columns AH to AM). Leave blank if not required.

AB	AC	AD
TENANT_GUID_1	TENANT_NAME_1	TENANT_SALUTATION_1

AE	AF	AG
TENANT_EMAIL_1	TENANT_PHONE_CODE_1	TENANT_PHONE_1

AB	AC	AD
TENANT_GUID_1	TENANT_NAME_1	TENANT_SALUTATION_1
CR-TE010	Terry Tenant	Terry

AE	AF	AG
TENANT_EMAIL_1	TENANT_PHONE_CODE_1	TENANT_PHONE_1
tez_ten@liveshere.com.au	61	423555555

Example of Completed Data.

Note: Tenant 1 is the only person that will be sent communications generated from the Sensor portal.

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5. LEASE INFORMATION

LEASE_START is the starting date of the lease and is in the format DD/MM/YYYY

LEASE_END is the starting date of the lease and is in the format DD/MM/YYYY

AN	AO
LEASE_START	LEASE_END

Example of Completed Data.

AN	AO
LEASE_START	LEASE_END
12/01/2023	11/01/2024

IMPORTANT POINTS TO NOTE

A. You may have to create a 'report' to export from your system into .csv mapping all these fields.

B. The 'report' should ALWAYS include ALL properties. If you do not include properties that were uploaded previously in your new 'report', the Sensor system will think they are no longer active properties and will deactivate them.

C. Once you have imported your first file, you MUST NOT change the identification data for that property or it may create duplicate records or overwrite existing properties. These fields must NEVER be changed after first import:
   - PROPERTY_GUID,
   - PROPERTY_ID, and
   - PROPERTY ADDRESS

D. Once you have exported from your system, DO NOT open or edit the .csv file in Excel or any other software, or your data integrity may be affected

E. If you do manually populate the spreadsheet, you will need to remove all hyperlinks in email fields, ensure you make all cells text fields and continue to save in .csv format. A reminder that editing the .csv file in Excel or any other software without following this guide means your data integrity may be affected.

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6. UPLOADING THE FILE
Go to Settings / Integrations

7. CSV DATA IMPORT
Enable CSV Import by checking the box

8. DRAG / COPY FILE into the upload area and click submit

SETTINGS

Support   E-Learning

BUSINESS SETTING   AGENTS   CONTRACT   INTEGRATIONS   COMMUNICATION PREVIEWS   POD OR TASK

INTEGRATIONS

☑ Enable CSV Import?   Download Template

CSV Import

Last Sync
N/A

Drop files here or click to upload.

Upload csv upto 5MB

Total	Added	Updated	Deactivated	Issues	In Review
-	-	-	-	-	-/-

Submit

Sync In Progress

CSV Import *Sync in progress... 0/1*

Last Sync
N/A

Total	Added	Updated	Deactivated	Issues	In Review
-	-	-	-	-	-/-

Sync In Progress

CSV Import

Last Sync
Jun 6, 2023 | 1:53 PM   History

Total	Added	Updated	Deactivated	Issues	In Review
1	1	0	0	-	0

If there are issues, click on History, and find what the issues are.

Rectify your data and re-upload your data from Step 6 again.