



Agent Training 3
Setting up a Shadow Agent
-Agent Admin

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Setting Up a Shadow Agent – Agent Admin

If your business has additional staff (like receptionists or assistants) who assist agents in managing their portfolio but are not listed in your trust system, you can still add them to your Sensor portal manually to 'shadow' the property managers. Whether they assist with specific tasks for ALL properties, or assist one agent only, we can set them up as a Shadow Agent.

1. SETTINGS

Click the settings cog wheel on the bottom left of the menu bar and then click the AGENTS tab

2. ADD AGENT

Click on Add Agent button

3. SELECT AGENT

An Agent will be able to see the properties of the person they shadow.

SETTINGS

SUPPORT E-Learning

BUSINESS SETTING AGENTS CONTRACTORS INTEGRATIONS COMMUNICATION PREVIEWS POD OR TASK

AGENTS MANAGEMENT

FILTERS Search...

Name ^	Role ^	POD or Task	Created On ^	Modified On ^	Deactivated Date ^	Status ^	Actions
Susan Olsen	Agent	-	Jun 8, 2023	Jun 8, 2023	-	Active	🔒
Robert Reed	Agent	-	Jun 8, 2023	Jun 9, 2023	-	Active	🔒
Carol Brady	Agent Super User	-	Jun 8, 2023	Jun 8, 2023	-	Active	

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ADD AGENT +

← ADD AGENT

Agent Type *

Agent Agent Admin

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4. ADD SHADOW AGENT DETAILS
Include name, email and phone

5. PRIMARY AGENT
This is the agent whose portfolio they need to shadow and perform tasks for.

6. WHICH PRIMARY AGENT TO CHOOSE
Does your shadow agent do tasks for ALL properties in the business? Then select None as the primary agent so they can see all properties.
If your shadow agent only assists one property manager, then choose that person as the primary agent.

The screenshot shows the 'SETTINGS' page with the 'AGENTS' tab selected. The 'ADD AGENT' form is displayed with the following fields and options:

- Agent Type:** Radio buttons for 'Agent' (selected) and 'Agent Admin'.
- Name:** Text input field.
- Email:** Text input field.
- Phone Code:** Text input field with a dropdown arrow.
- Phone Number:** Text input field.
- Primary Agent:** Dropdown menu with the text 'Select Primary Agent' and a dropdown arrow.
- Buttons:** 'Submit' and 'Cancel' buttons.





This close-up shows the 'ADD AGENT' form with the 'Primary Agent' dropdown menu open. The dropdown list contains the following options:

- None
- Robert Reed
- Susan Olsen




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7. SHADOW AGENT SHOWS
In the Agent list, your new agent is shown and has a primary agent listed.

Name	Role	Primary Agent	Created On	Modified On	Deactivated Date	Status	Actions
Reggie Reception	Agent	Robert Reed	Jun 13, 2023	Jun 13, 2023	-	Active	 
Carol Brady	Agent Super User	-	Jun 8, 2023	Jun 12, 2023	-	Active	
Robert Reed	Agent	-	Jun 8, 2023	Jun 9, 2023	-	Active	 

7. SHADOW AGENT LOGS IN
Once they receive the email to create their account and log in, your newly created shadow agent can see the same property list as their primary agent and the shadow icon is displayed.

Property ID	Property Address	Primary Agent	Asset Owner	Tenant	Added On	On Lease	Alarm Installed	Next Test	Status	Actions
P07BB008	107 Ganara Rd, West Gosford, NSW, 2250	Robert Reed	Alice Nelson	Fred Flintstone	Jun 8, 2023	Yes	No	-	New	
P07BB016	144 Sunshine Drive, Point Clare, NSW, 2250	Robert Reed	Sherwood Schwartz	Indigo Sky	Jun 8, 2023	Yes	No	-	New	
P07BB013	234 Kulara Ave, West Gosford, NSW, 2250	Robert Reed	Florence Henderson	Esme Wilson	Jun 8, 2023	Yes	No	-	New	
P07BB002	163 Stockyard Place, West Gosford, NSW, 2250	Robert Reed	Greg Brady	Clare Diva	Jun 8, 2023	Yes	Yes	Jun 8, 2024	Active	
		Robert Reed	Bobby Brady	Roy Brady	Jun 8, 2023	Yes	No	-	Accepted	