Agent Training 4
Inviting Contractors -Agent Admin

Agent Training 4
Inviting Contractors – Agent Admin

In Agent Training 2 – Setting Up Sensor Portal, we showed you how to add a contractor and find one already on the platform in your area via Settings / Contractors. Let's have a closer look.

1. REGISTERED
A registered contractor means they have registered on the Sensor Trade portal, and a tick shows they have submitted their license and insurance details.

You will also see the quote amount they have submitted for supply and installation.

The padlock icon under Actions is where you can grant access for them to issue an Entry Notice signed by you.

If this setting is set to NO and the contractor requires access, they will be requesting via the Sensor Portal for you to initiate the Entry Notice

SETTINGS

E-Learning   Support

BUSINESS SETTING   AGENTS   CONTRACTORS   INTEGRATIONS   COMMUNICATION PREVIEWS

CONTRACTOR MANAGEMENT

APPROVE CONTRACTOR FOR EN ⊕

Search...

Invite Contractors

REGISTERED   INVITED   FIND CONTRACTORS

Business No	Contact Name ^	Contact Email ^	Contact Phone ^	Costing	Approved for EN ^	Actions
Sam Butcher ✓	Sam	karen.myers+SamButcher@sensorglobal.com	+61 412 420 062	$476.85	No	🔓

Show Rows 50 ▾   1 – 1 of 1 ← →

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2. INVITED
This shows the Contractors you have invited and who haven't accepted your invitation yet

You can reissue the invitation by clicking the circle arrow icon in the Actions column.

If they are invited but haven't accepted, contact them to offer support from you or from Sensor Support

3. FIND CONTRACTORS
Type in a name or email address in the search bar. If they are already registered on the Sensor Trade Portal, you can invite them to conduct installations and maintenance for your business. Click the Invite Icon to invite them.

SETTINGS

E-Learning   Support

BUSINESS SETTING   AGENTS   CONTRACTORS   INTEGRATIONS

CONTRACTOR MANAGEMENT

INVITE CONTRACTORS ⊕

🔍 Search...

REGISTERED   INVITED   FIND CONTRACTORS

Business Name ˄	Contact Name ˄	Contact Email ˄	Contact Phone ˄	Costing	Approved for EN ˄	Actions
Spike's Sparks	Spike Milligan	karen.myers+Spike@sensorglobal.com	-		No	🔄

Show Rows 50 ▾   1 – 1 of 1 ← →

FIND CONTRACTORS

tact Name ˄	Contact Email
	karen.m

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3

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Please do not complete this section until you have spoken with your electricians.
We call them Contractors in the Sensor portals.

4. INVITING NEW CONTRACTORS
If you have no registered or invited contractors, you can invite your own trusted electricians (Contractors). In your Welcome Pack there is information and an email template for you to send to your contractors.

Access the Introductory Communications from your welcome email. If contractors know about the Sensor Global suite of products in advance they will be prepared for when they receive a welcome email from you generated by the Sensor Agent portal.

SETTINGS

E-Learning | Support

BUSINESS SETTING | AGENTS | CONTRACTORS | INTEGRATIONS | COMMUNICATI...

CONTRACTOR MANAGEMENT

INVITE CONTRACTORS ⊕

Search

REGISTERED | INVITED | FIND CONTRACTORS

Business Name ^	Contact Name ^	Contact Email ^	Contact Phone ^	Costing	Approved for EN ^	Actions
Spike's Sparks	Spike Milligan	karen.myers+Spike@sensorglobal.com	-		No	

Show Rows 50 ▾   1 – 1 of 1 ← →

Invite Contractors ✕

Invitation details ⊕

Business Name * ⊗

Business Name

Contact Name *

Contact Name

Email *

Email

CANCEL | INVITE

https://agent.sensorglobal.com/