

Agent Training 2.1
Integrating Property Data
-Agent Admin

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Integrating Property Data – Agent Admin

1. INTEGRATIONS

On this screen you have a couple of options on how to import your data, either via a CSV file or connecting your trust system directly to Sensor.

2A. CSV DATA IMPORT

Please refer to Agent Training 2.2 Property Data Import via CSV.

OR

2B. ENABLE YOUR RELEVANT TRUST SYSTEM

This will only connect if the Business Name you use in the Sensor Agent Portal is THE SAME as you use for your trust system.

3. ACCOUNT CODES

This is the accounting creditor codes you normally pay for e.g., fire safety / maintenance / electricians from in your trust system.

Agent Training 2.1

Integrating Property Data – Agent Admin

4. COMMUNICATIONS PREVIEW

Once your Data is imported, you will need to review the communications that are sent to Agents, Asset Owners and Tenants at various times.

Communications protocols have been pre-set. You can preview the email / text for each item.

You can modify some settings to suit your business practices.

If you do change some settings, please remember to SAVE the changes at the bottom of the screen

SETTINGS

BUSINESS SETTINGS AGENCIES CONTRACTORS INSURANCE **COMMUNICATION PREVIEWS** POD OR TASK

Support E-Learning

Search by event type or recipient

Alert	SMS	Email
To Agency	<input type="checkbox"/>	<input type="checkbox"/>
To Agent	<input type="checkbox"/>	<input type="checkbox"/>
To Asset Owner	<input type="checkbox"/>	<input type="checkbox"/>
To Tenants	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Alert 30 Seconds

To Agency	<input type="checkbox"/>	<input type="checkbox"/>
To Agent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
To Asset Owner	<input type="checkbox"/>	<input type="checkbox"/>
To Tenants	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Job created by Agency

To Asset Owner	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Tenants	Email	<input checked="" type="checkbox"/>

Preview

Email

Alert: The Sensor Global Alarm at {PropertyAddress} has been triggered.
Alert: The Sensor Global Alarm at {PropertyAddress} has been triggered.

SMS

Alert: The Sensor Global Alarm at {PropertyAddress} has been triggered.
Alert: The Sensor Global Alarm at {PropertyAddress} has been triggered.

Alarm Test completed

To Asset Owner	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Contractor	Email	<input checked="" type="checkbox"/>
To Tenants	Email	<input checked="" type="checkbox"/>

For compliance purposes, some notifications cannot be changed.

Agent Training 2.1

Integrating Property Data – Agent Admin

5. FINAL CHECKS

Confirm that all your agent information has been imported correctly.

The screenshot shows the 'SETTINGS' page with a navigation menu on the left. The 'AGENTS' tab is selected. Below the navigation is the 'AGENTS MANAGEMENT' section, which includes a search bar and a table of agents. The table has columns for Name, Role, POD or Task, Created On, Modified On, Deactivated Date, Status, and Actions. Three agents are listed: Susan Olsen (Agent), Robert Reed (Agent), and Carol Brady (Agent Super User). Each agent has an 'Active' status and a lock icon in the Actions column. A circular callout highlights the user profile icon in the left navigation menu.

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	

6. UPDATE YOUR PROFILE

Use the edit pencil to add a photo or to change your display name.

Ensure Auto Deactivation is toggled OFF (not green) if you are importing properties by .csv format.

The screenshot shows the 'MY PROFILE' page for Carol Brady. It includes a profile card with a photo placeholder, name, phone number (+1 043-510-4959), and email (karen.myers+CarolBrady@sensorglobal.com). Below the profile card are several settings: Change Password, 2FA Authentication, Run Sheet, and Auto Deactivation. The Auto Deactivation toggle is currently turned ON (green).

MY PROFILE Last Updated: Jun 8, 2023

Carol Brady
+1 043-510-4959
karen.myers+CarolBrady@sensorglobal.com

- Change Password
- 2FA Authentication
- Run Sheet
- Auto Deactivation