SENSOR

Agent Training 2.1
Integrating Property Data -Agent Admin

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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.

SETTINGS

eLearning   Support

BUSINESS SETTING   AGENTS   CONTRACTORS   INTEGRATIONS   COMMUNICATION PREVIEWS   PURCHASE STOCK

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 up to 5MB
Submit

Enable Property Tree?

Compliance category
Compliance category

Account Codes
Sensor
Enter sensor account code

Last Sync
N/A

Total	Added	Updated	Deactivated	Issues
-	-	-	-	-

Contractor
Enter contractor account code

Save

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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

For compliance purposes, some notifications cannot be changed.

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5. FINAL CHECKS
Confirm that all your agent information has been imported correctly.

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.

SETTINGS

Support   E-Learning

BUSINESS SETTINGS   AGENTS   CONTRACTORS   INTEGRATIONS   COMMUNICATION PREVIEWS   POD OR TASK

AGENTS MANAGEMENT

ADD AGENT ⊕

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	

Show Rows 50 ▾   1 – 3 of 3 ← →

MY PROFILE   Last Updated: Jun 8, 2023

Carol Brady
📞 +61 043-510-4959
✉ karen.myers+CarolBrady@sensorglobal.com

🔒 Change Password   ›

💬 2FA Authentication   ⊘

⇄ Run Sheet   ⊘

⇄ Auto Deactivation   ⦿

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