



Agent Training 2.3 Integrating Property Tree Data

Version 2 - October 2023

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Integrating Property Tree Data

BEFORE LINKING TO SENSOR

Set-up Sensor Global as a new supplier / creditor in Property Tree.



1. SENSOR DETAILS

Company: Sensor Global Pty Ltd
ABN: 50642017767
Website: <https://sensorglobal.com>
Email: support@sensorglobal.com

7/3 Koala Cres, West Gosford
NSW 2250 Australia

BSB: 062 692
Account: 7567 8971

Reference: Invoice Number (starts with SGS)

Also ensure you have all your Contractors (electricians) that you will be using for Sensor work already set-up within Property Tree as a supplier with all their contact, ABN and payment information.

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1. ACTIVATE SENSOR CLOUD SOFTWARE

Within Property Tree, navigate to Partner Gateway, (Configuration / Integrations) and search for Sensor Cloud Software. Click ACTIVATE

2. LINKING TO SENSOR

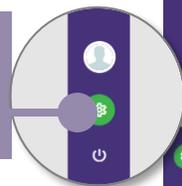
Activation will create a unique API key for your agency that links you and Sensor Cloud Software. When you press the activate button inside Property Tree – this gives your consent for Sensor to access your data.

3. LOGIN to Sensor

Go to agent.sensorglobal.com and login with the credentials you created when setting up your Sensor account.

4. SETTINGS

Click the cog wheel on the bottom left of the menu bar to access settings



Integration with Sensor Global is a TWO-WAY integration.

Once installation jobs are completed, invoices for the Contractor and the annual Sensor Global Subscription will go back into your trust system.

Once integration is turned on, please do not switch it off.

SETTINGS eLearning Support

BUSINESS SETTING AGENTS CONTRACTORS INTEGRATIONS COMMUNICATION PREVIEWS PURCHASE STOCK

EDIT BUSINESS SETTING

Business Name * Business Principal / Manager *

Business Manager Email *

Business Address *

Phone Code * Phone Number *

Timezone *

Australia/Canberra

Entry Notice

Auto Invite New Asset Owners

Email Signature *

Submit **Cancel**

This email signature will be used for the purpose of Entry Notices and all email correspondence generated within Sensor Global.

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5. CONFIRM BUSINESS NAME
Property Tree API will only connect to Sensor if the Business Name you use in the Sensor Agent Portal is EXACTLY THE SAME as you use for your trust system.

Go to BUSINESS SETTINGS and confirm that your Business Name on that page is EXACTLY as your registered business name in Property Tree. If NOT, please update your business name on the Sensor Business Settings Page.

6. INTEGRATIONS
Go into the INTEGRATION tab and CLICK to Enable Property Tree

7. PROPERTY TREE SETTINGS
On the right-hand section, choose your Compliance Category. This is what you use in Property Tree

SETTINGS

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
-	-	-	-	-	-/-

Enable Property Tree?

Property Tree

Last Sync
N/A

Total	Added	Updated	Deactivated	Issues
-	-	-	-	-

Compliance category
Compliance category

Account Codes

Sensor
Enter sensor account code

Contractor
Enter contractor account code

Save

Property Tree Settings

Register

CATEGORY	MANAGED BY	SERVICED BY	COMPLIANCE EXPIRY DATE	NEXT SERVICE DATE	FREQUENCY	REMINDER	NOTES	DOCUMENTS
Smoke Alarms	Agent	19_JUN_CONT	31/07/2024	31/08/2023	1 Months			

Compliance History

No compliance has been completed for this property

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7. PROPERTY TREE SETTINGS

On the right-hand section, enter in your Property Tree Creditor expense account codes for payment to Sensor (e.g. 408230 Fire Protection) and to Contractors (e.g. 408170 Electrical), then hit Save.

8. DATA IMPORT

If you click the Refresh button - this will start to bring in data immediately, or else every day around 5am it will update automatically.

The screenshot shows the 'SETTINGS' page with the 'INTEGRATIONS' tab selected. The 'Property Tree' integration is highlighted, and a 'Refresh' button is visible. A 'Download Template' button is also present for the CSV Import section.

Integration	Last Sync	Total	Added	Updated	Deactivated	Issues	In Review
CSV Import	N/A	-	-	-	-	-	-
Property Tree	N/A	-	-	-	-	-	-

Follow the other QUICK REFERENCE GUIDES to finish your set-up and invite your contractors. Then invite your property owners.

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9. GETTING INFORMATION BACK TO PROPERTY TREE
When a job is completed, the invoices will be sent back to Property Tree from Sensor Cloud Software automatically.

If the creditor exists in Property Tree, it will connect to their record and the invoice will appear for payment.

If creditor is not known in Property Tree, it will add them as a new creditor and add the new invoice under their record.

NO work orders need to be created in Property Tree

The screenshot shows a web interface for a creditor invoice. At the top, it says "Creditor Invoice #1311". Below this, there are two input fields: "Creditor" with a dropdown menu showing "Sensor (ID: 166)" and "Property" with a dropdown menu. An "Ownership:" field is also present. The "Invoice Details" section includes a "PRIORITY INVOICE" label, "Invoice Date: 17/08/2023", "Status: Unpaid", and "Paid Date:". Below this is a table with columns: INV/BPAY REF, DESCRIPTION, DUE DATE, ACCOUNT, GST, and AMOUNT. The table contains one row: "SGS/2023/01091", "Fire Safety", "16/09/2023", "Fire Safety", "\$5.50", "\$89.00". Summary rows show "GST \$8.09", "Amount (Exc. GST) \$80.91", and "Total Amount \$89.00".

INV/BPAY REF	DESCRIPTION	DUE DATE	ACCOUNT	GST	AMOUNT
SGS/2023/01091	Fire Safety	16/09/2023	Fire Safety	\$5.50	\$89.00
				GST	\$8.09
				Amount (Exc. GST)	\$80.91
				Total Amount	\$89.00

The screenshot shows a web interface for a creditor invoice. At the top, it says "Creditor Invoice #1298". Below this, there are two input fields: "Creditor" and "Property". An "Ownership:" field is also present. The "Invoice Details" section includes a "PRIORITY INVOICE" label, "Invoice Date: 16/08/2023", "Status: Unpaid", and "Paid Date:". Below this is a table with columns: INV/BPAY REF, DESCRIPTION, DUE DATE, ACCOUNT, GST, and AMOUNT. The table contains one row: "Installation Sensor Hub and Smoke alarms", "Fire Safety", "30/08/2023", "Fire Safety", "\$31.00", "\$341.00". Summary rows show "GST \$31.00", "Amount (Exc. GST) \$310.00", and "Total Amount \$341.00".

INV/BPAY REF	DESCRIPTION	DUE DATE	ACCOUNT	GST	AMOUNT
	Installation Sensor Hub and Smoke alarms	30/08/2023	Fire Safety	\$31.00	\$341.00
				GST	\$31.00
				Amount (Exc. GST)	\$310.00
				Total Amount	\$341.00

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9. SENSOR GLOBAL ANNUAL SUBSCRIPTION INVOICES

Annual subscription invoices for the Sensor Global Monitoring are raised upon installation.

They renew annually and will be invoiced each year.

These will be sent through to your trust as an Invoice to your owner (via) from Sensor Global with no intervention by you and will use the invoice number as the payment reference number.



To: {Property Owner}
C/- {Agency}
{Agency Street Address}
{Agency Suburb, State, Postcode}

From:
Sensor Pty Ltd
7/3 Koala Cres
West Gosford NSW 2250

ABN: 50 642 017 767

Tax Invoice SGS/2023/08211

Property ID:
12320000

GL code: Cost Center:
Property address:
123 Happy Street,
Happyville, NSW 2000

Invoice Date: 09/12/2023 **Due Date:** 09/12/2023 **Source:** S00310

Description	Quantity	Unit Price	Taxes	Total Price
Annual Subscription 09/06/2023 to 08/06/2024	1.00 Units	80.91	GST Sales	\$ 89.00
Untaxed Amount				\$ 80.91
GST 10%				\$ 8.09
Total				\$ 89.00

Please use the following reference for your payment: **SGS202308211**

Pay to: Sensor Pty Ltd
BSB 062 692
Account 7567 8971

Thank you for your business and for helping make properties safer.