

How to Create a Team in Sentrilock

Who can be a “Team”: You can have both agent to agent, and Broker to Agent teams.

What is a “Team” in Sentrilock: A team is pair of people who are allowed to share lockboxes with each other. Team membership can be established in two ways:

- A one sided team membership (Only one person shares lockboxes)
- A two sided team membership (Both people share lockboxes with each other)

What can a “Team” do with Shared Lockboxes: Team members allow other members to use their boxes as a secondary lockbox owner. This means if you have a team membership established with someone else they can use your box as if they were the owner. This includes removing the shackle.

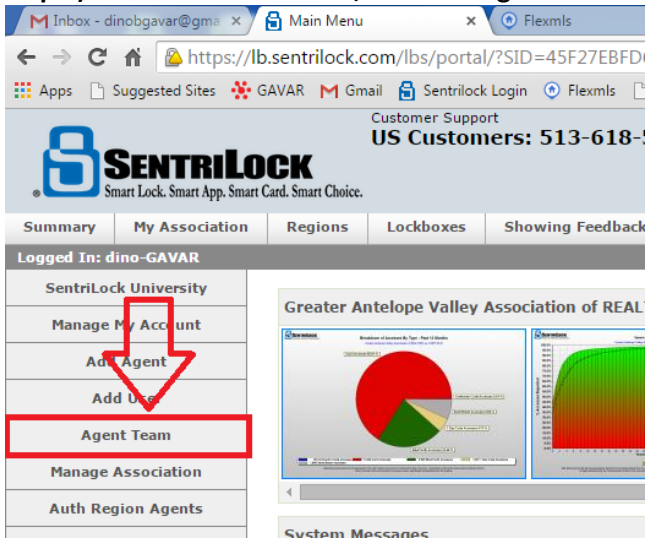
- A one sided team membership: The person who establishes another individual as a team member cannot see or use the other individual’s lockboxes, but the other individual can see and use both their own lockboxes and their team member’s boxes.
- A two sided team membership: Both team members can see and use each other’s boxes.

HOW TO SETUP TEAM MEMBERSHIP:

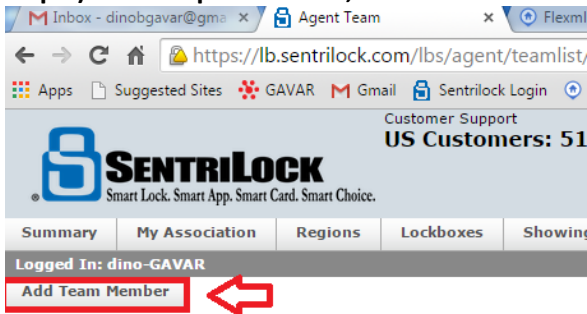
- In this section we will show how to establish a one-way, and a two-way relationship

Step 1) Log into Sentrilock

Step 2) On the left hand side, click on “Agent Team”:



Step 3) In the top left corner, Click on “Add Team Member”:



Step 4) *This part is VERY important to get correct if your only establishing a one sided team.*

- In the "Agent" box put the name of the agent who will share **THEIR** boxes with another individual.
- In the "Team Member" box put the name of the agent who will be able to use the agents boxes above.
- Hit "Save Changes" when completed.

The screenshot shows the Sentrilock web application interface. At the top, there's a navigation bar with the Sentrilock logo and the text "Customer Support US Customers: 513-618-5800". Below this is a menu with options like "Summary", "My Association", "Regions", "Lockboxes", "Showing Feedback", "RMA", "Sentrilock Cards", "Agents", "Companies", "Listings", "Users", "Event Tracking", "Reports", and "Support". The "Agents" menu item is currently selected. The main content area displays the "ADD AGENT TEAM MEMBER" form. This form is divided into two sections: "Agent" and "Team Member". In the "Agent" section, there is a dropdown menu with "Biel, Dino" selected. In the "Team Member" section, there is a dropdown menu with "Garcia, Nataly" selected. Red boxes and arrows highlight these dropdowns. Two callout bubbles explain the roles: "I am sharing my lockboxes with the person below." and "I can see and use the boxes of the person above as if I was the secondary owner." Below the form, there are "Save Changes" and "Cancel" buttons. A legend at the bottom indicates that a blue box signifies required fields.

Step 5) Repeat Step 4, but flip the position of the agents

- Whoever was in the "Agent" box put their name in the "Team Member" box
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