
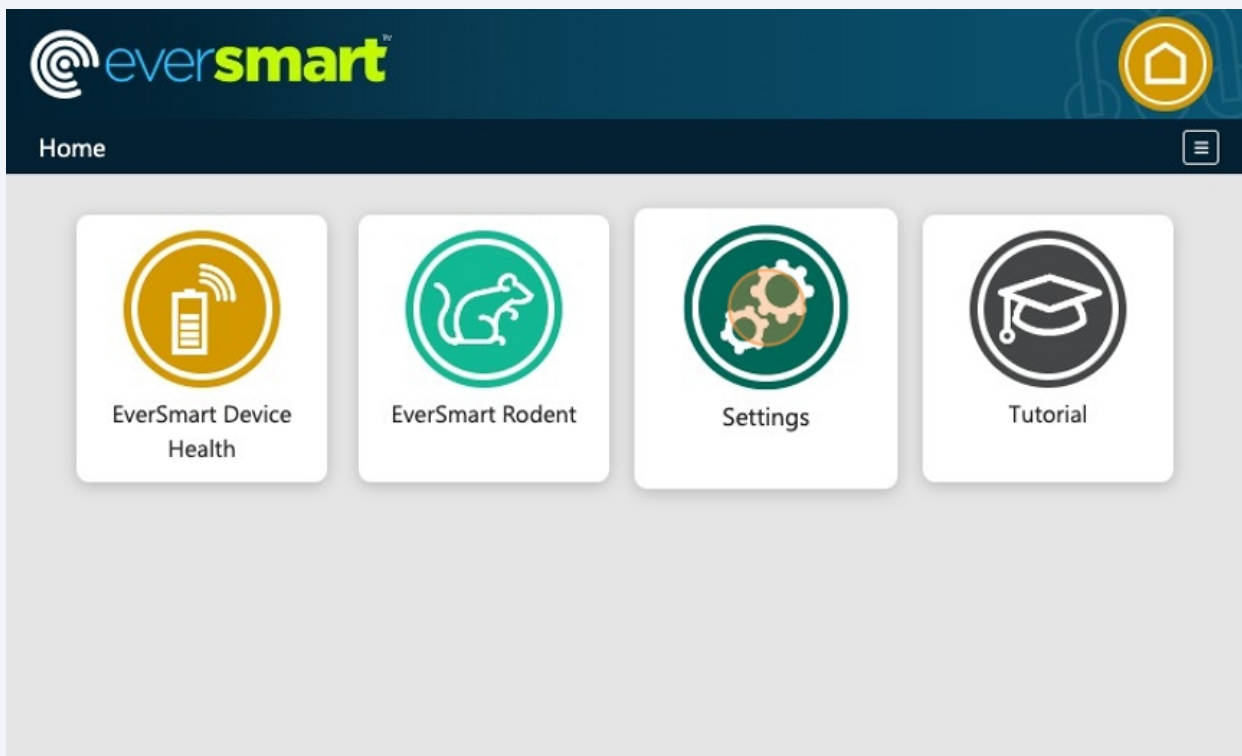


How to Use Settings

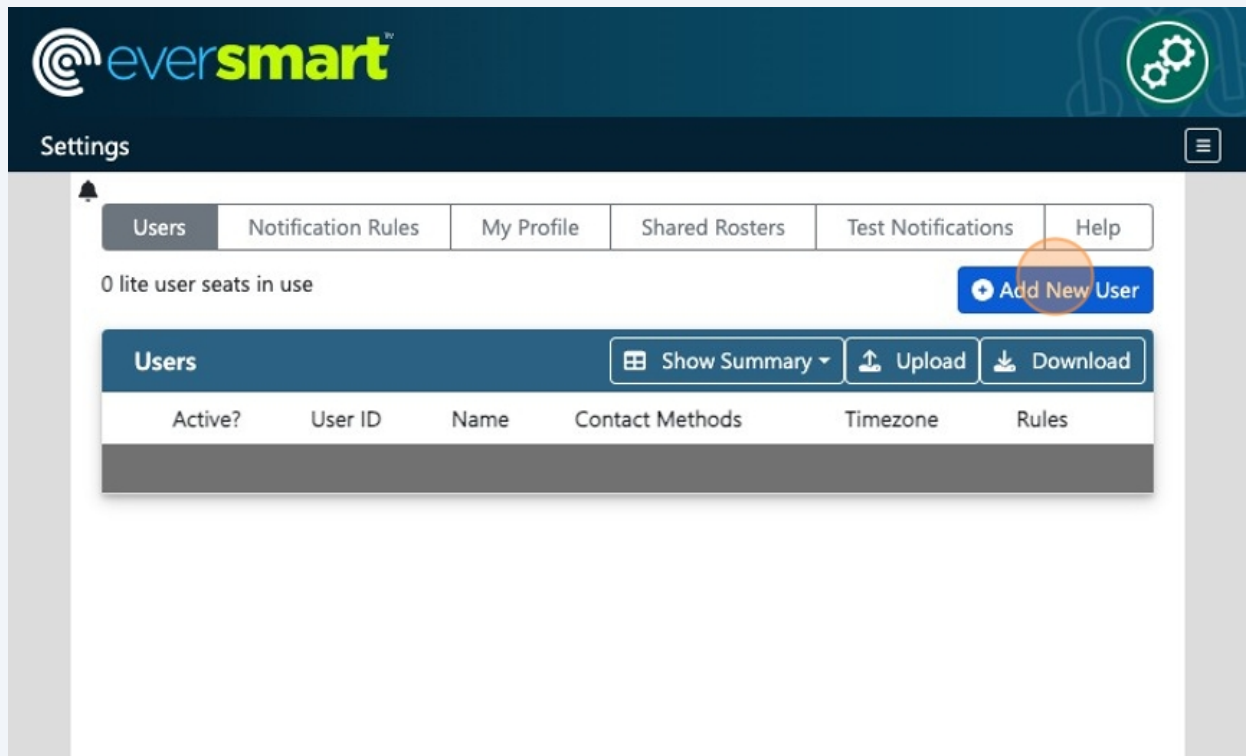
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 Use the Settings dashboard to configure users and notification rules for receiving notifications from EverSmart Alert

1 Open Settings



2 Start by clicking "Add New User" to add a new user to receive notifications



i If you have removed users from the Settings without fully deleting them, you will see Add User as a dropdown instead of Add New User as a button. To add a New User via the dropdown, click Add User, then click Add New User on the bottom of the dropdown.

3 Enter an email address for the User ID.

"First Name" and "Last Name" are also required fields, but "Job Title" is optional. "Timezone" defaults to your local timezone, but you can change that by clicking the drop down.

The screenshot shows a form titled "Add user" with the following fields and controls:

- User ID:** A text input field with a validation error message "User ID - must be an email address" displayed in an orange circle to the left of the field.
- First Name:** A text input field.
- Last Name:** A text input field.
- Job Title:** A text input field.
- Timezone:** A dropdown menu currently showing "America/New_York" with a close button (X) on the right.
- Buttons:** "Save" (blue) and "Cancel" (grey) buttons are located in the top right corner.

4

To enable SMS notifications, click "Add New Contact Method", then select "Work Phone" or "Personal Phone"

The screenshot shows a contact profile page with the following elements:

- Job Title:** An empty text input field.
- Timezone:** A dropdown menu set to "America/New_York".
- Contact Methods:** A section with a blue button "Add New Contact Method" and a dropdown menu. The dropdown menu is open, showing options: "Work Email", "Work Phone", "Personal Email", "Personal Phone", and "ReactM Push Notifications". "Work Phone" is highlighted with a blue bar.
- Existing Contact Method:** A card for "Work Email" with the address "csmith@company.com" and "Format HTML".
- Notification Rules:** Two radio buttons: "Do NOT send notifications" (unselected) and "Only send notifications for the following rules" (selected).
- Bottom Navigation:** A bar with tabs: "Active?", "Alerts", "Stages", "Locations", "Contact Methods", and "Schedule".

5

Enter the phone number and click "OK"

The screenshot shows the "Work Phone" form with the following elements:

- Timezone:** A dropdown menu set to "America/New_York".
- Contact Methods:** A blue button "Add New Contact Method".
- Existing Contact Method:** A card for "Work Email" with the address "csmith@company.com" and "Format HTML".
- Work Phone Form:** A form with a title "Work Phone" and a blue "OK" button. Below the title is a grey error message: "The country code is required. Enter it or select the country from the dropdown." Below the error message is a text input field containing "+1 617 555 5555" with a US flag icon on the left. To the right of the input field are "OK" and "Cancel" buttons.
- Notification Rules:** Two radio buttons: "Do NOT send notifications" (unselected) and "Only send notifications for the following rules" (selected).

- 6 IMPORTANT - click the "Save" button to save the new user

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Settings

Add user

Save Cancel

User ID - must be an email address
csmith@company.com

First Name
Chris

Last Name
Smith

Job Title

- 7 Review the users in your configuration on the "Users" tab. You can click the "Pencil" icon to edit an existing user, the "Trash" icon to delete an existing user, or the "Add New User" button to add a new user to your configuration.

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Settings

Users Notification Rules My Profile Shared Rosters Test Notifications Help

1 lite user seat in use Add New User

Active?	User ID	Name	Contact Methods	Timezone	Rules	
	yes	csmith@company.com	Chris Smith	Work Email Work Phone	America/New_York	1

8

Use the "Notification Rules" tab to review all the notification rules for all users in your configuration. Click the "Pencil" icon to edit an existing Notification Rule.

The screenshot shows the EverSmart Settings interface. The 'Notification Rules' tab is selected, showing 1 active rule. A table lists the rule with columns: Active?, Alerts, Stages, Locations, User, Contact Methods, Schedule, and Timezone. The 'Active?' column has a pencil icon circled in orange.

Active?	Alerts	Stages	Locations	User	Contact Methods	Schedule	Timezone
yes	rodent	Created	all	Chris Smith	all	all	America/New_York

9

Edit this rule to filter by location, filter by work hours vs off hours, or choose which contact method(s) to notify.

The configuration page shows options for 'Temperature Alert', 'Completed', 'Timed-out', and 'Canceled'. The 'Locations' section has 'All customers' selected. The 'Send notifications' section has 'Via ALL contact methods' selected, with 'Work Phone' circled in orange. The 'Schedule' section has 'All hours' selected.

10 IMPORTANT - Click "Save" to save the changes to the notification rule

The screenshot displays the 'Edit Rule for Chris Smith' interface in the EverSmart system. The header includes the EverSmart logo and a 'Settings' label. The main content area is titled 'Edit Rule for Chris Smith' and features several configuration sections:

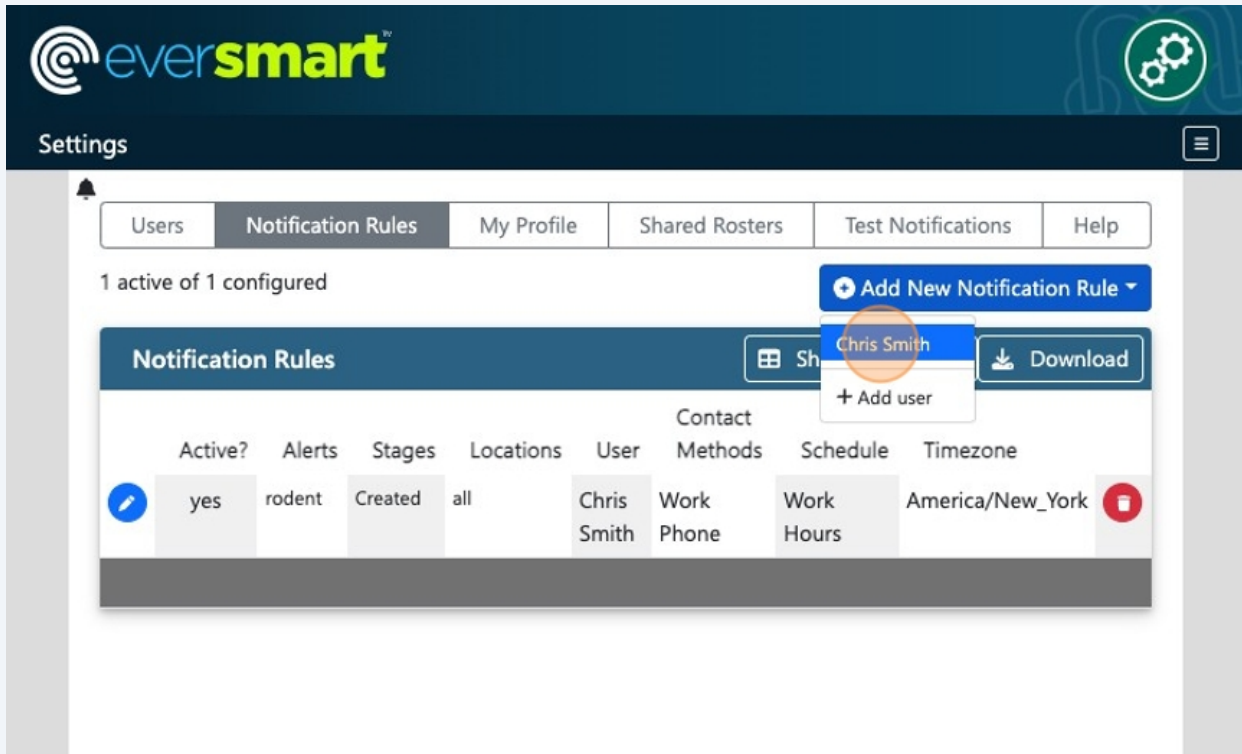
- Active:** A checkbox labeled 'Active' is checked.
- Alerts:** A list of alert types with radio buttons: 'Rodent Alert' (selected), 'Service Alert', 'Leak Alert', and 'Temperature Alert'.
- Incident Stage:** A list of incident stages with checkboxes: 'Created' (checked), 'Assigned', 'Started', 'Completed', 'Timed-out', and 'Canceled'.
- Locations:** A section with a radio button for 'All customers'.
- Send notifications:** A section with a radio button for 'Via ALL contact methods'.

At the top right of the form, there are two buttons: 'Save' (highlighted with an orange circle) and 'Cancel'.

11

To add a new Notification Rule, click "Add New Notification Rule" then choose the existing user.

Tip: you can add a new user in the same step by choosing the "Add user" option at the bottom of the user list.



12

For example, configure a new rule to text the user if an alert occurs at "Cedarwood Corner" or "Riverfront Plaza" during off hours.

Cedarwood Corner
 Riverfront Plaza
 Willowbrook Junction

Work Email
 Work Phone

Schedule

All hours
 Only during

Work Hours
 Off Hours

13

IMPORTANT - Click "Save" to add the new notification rule

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Settings

Add Rule for Chris Smith

Active

Alerts

Rodent Alert
 Service Alert
 Leak Alert
 Temperature Alert

Incident Stage

Created
 Assigned
 Started
 Completed
 Timed-out
 Canceled

Locations

All customers

Send notifications

Via ALL contact methods

Save
Cancel

14 You can test your configuration on the "Test Notifications" tab.

The screenshot shows the EverSmart web interface. At the top left is the EverSmart logo. Below it is a navigation bar with tabs: Users, Notification Rules, My Profile, Shared Rosters, **Test Notifications** (highlighted with an orange circle), and Help. Below the navigation bar is a notification bell icon and a text instruction: "Select the location from where to send a mock alert, then click the *Submit* button to create the alert and send notification(s)."

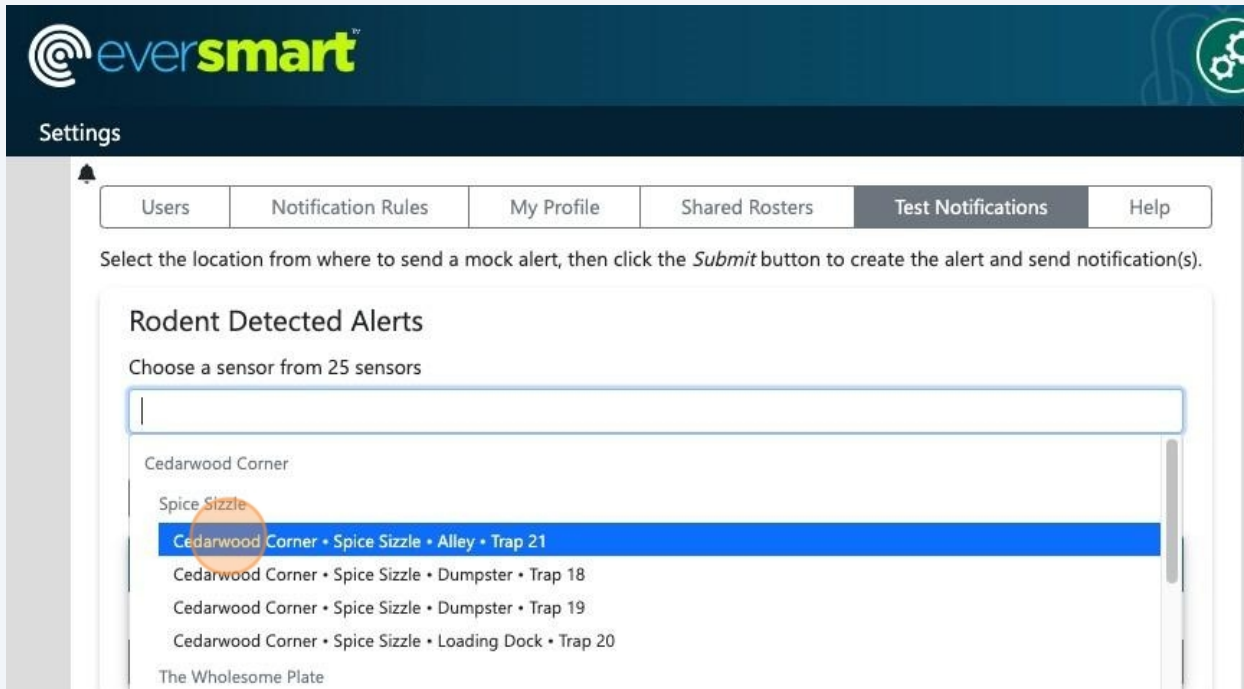
The main content area is titled "Rodent Detected Alerts" and contains a form with the text "Choose a sensor from 25 sensors" and an empty input field. Below the input field are two buttons: "Clear Selection" and "Submit".

At the bottom of the form is a table header "Mock Rodent Alerts" with a "Download" button. The table has the following columns: Customer, Site, Area, Trap #, DevEUI, MetaTags, and Result.

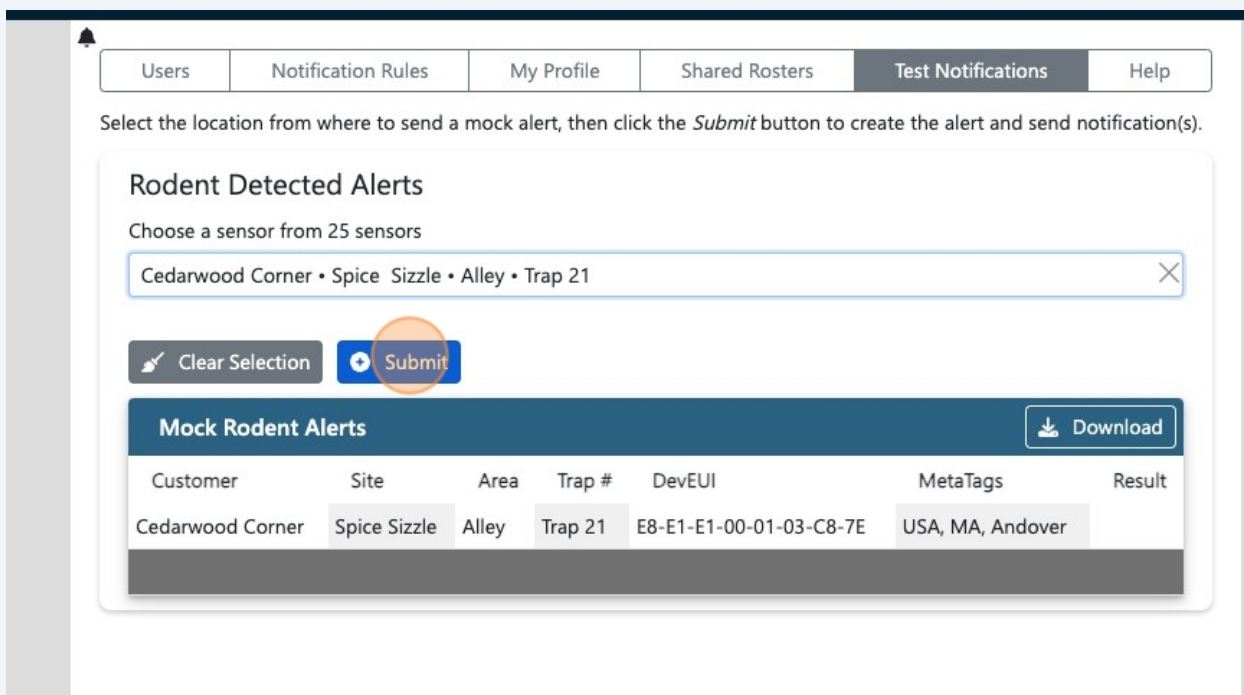
Customer	Site	Area	Trap #	DevEUI	MetaTags	Result
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15 Find the sensor you would like to test and click to select it.

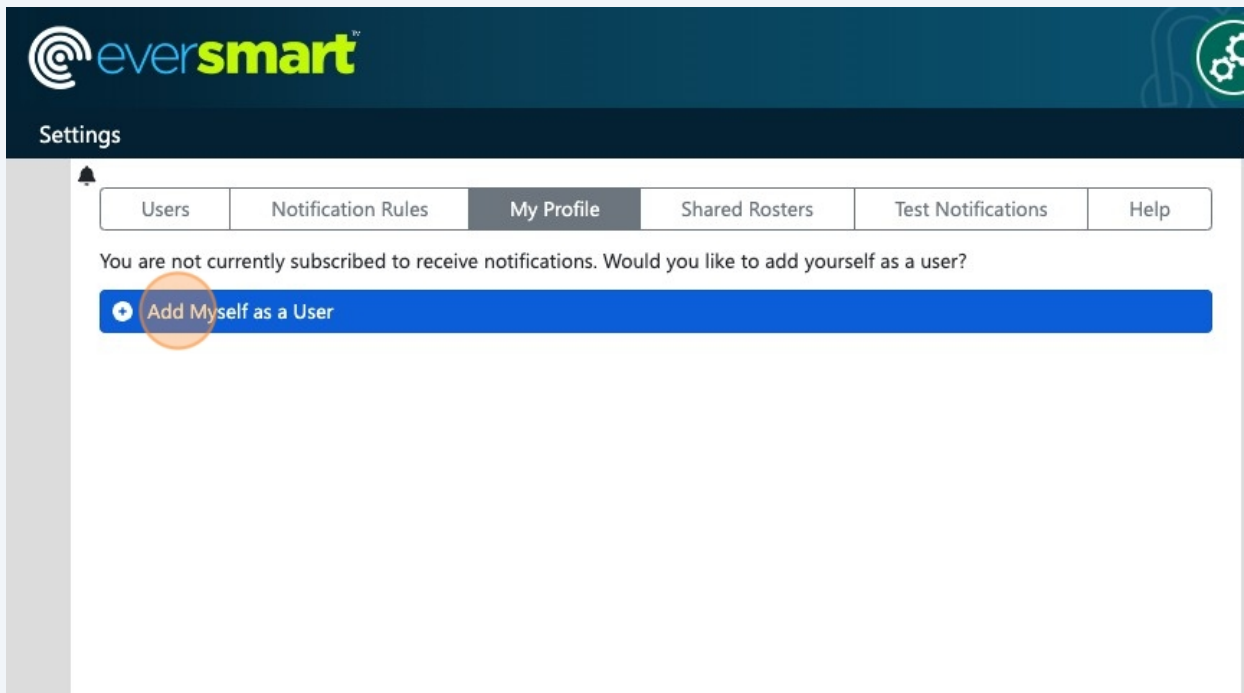
TIP: if you have a large number of sensors, you can enter text to search for the one you want.



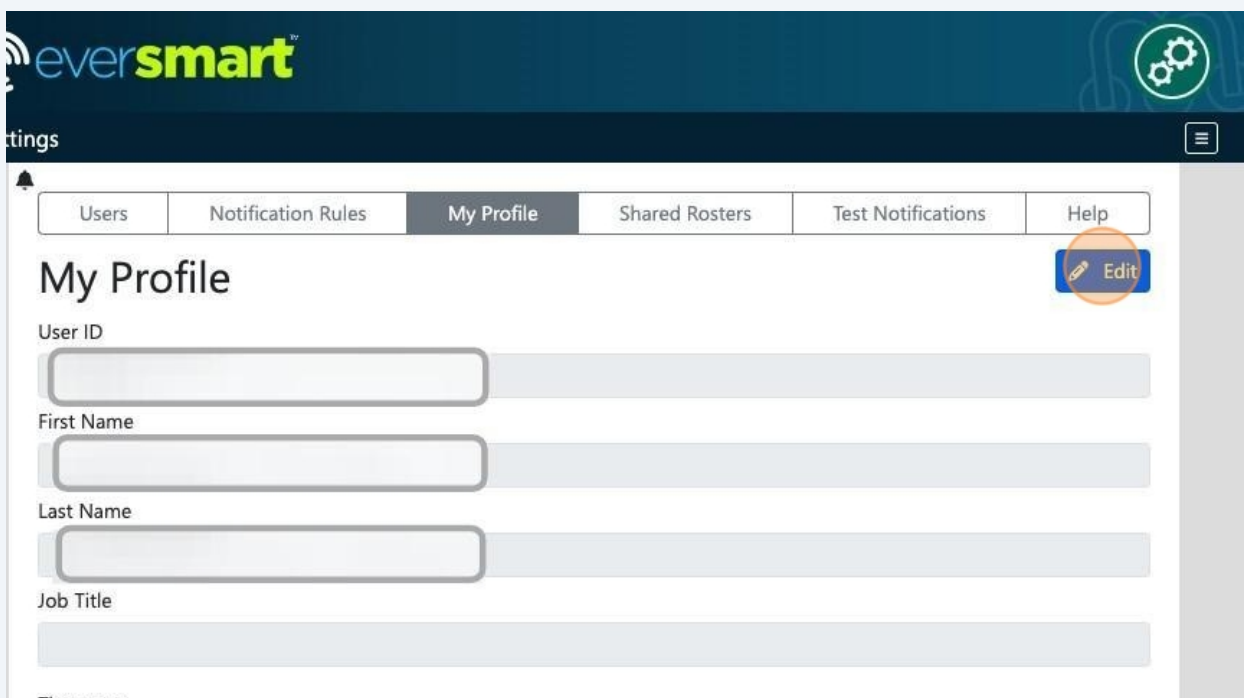
16 Click "Submit" to generate the alert and send the applicable notifications.



- 17 To configure your personal notification settings, click the "My Profile" tab, then click "Add Myself as a User"



- 18 To make changes, click the "Edit" button

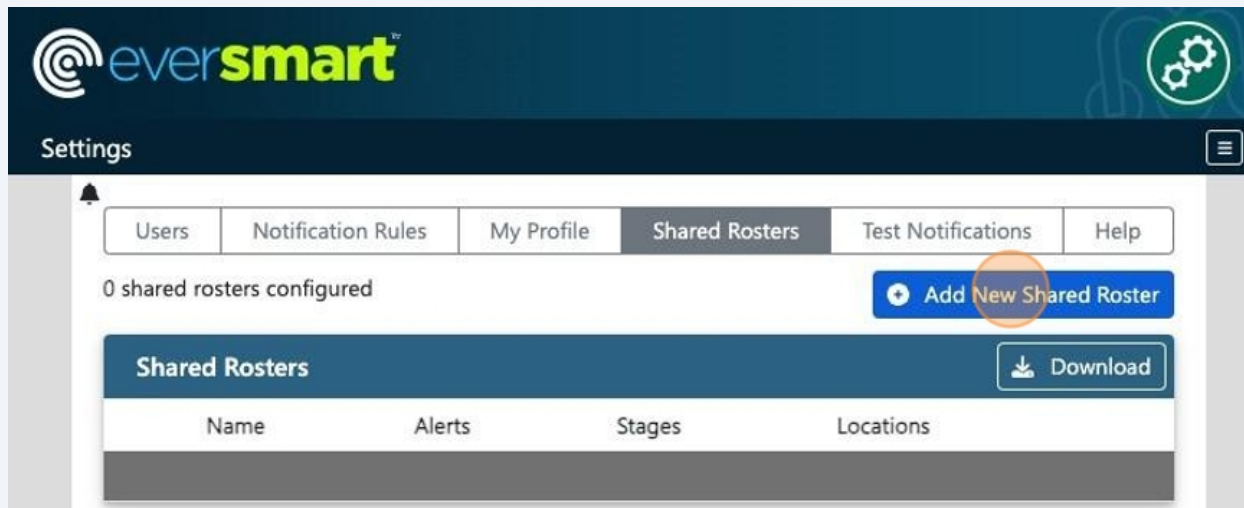


19

Use the "Shared Rosters" tab to review the shared rosters in your configuration. A shared roster is a kind of global rule that any user can link to.

Shared rosters are designed for large configurations where the workforce is organized into teams with assigned locations that may change over time. With shared rosters, the administrator can easily change the assigned locations of a whole team at once.

To add a new shared roster, click "Add New Shared Roster"



Shared rosters are added / changed / deleted globally by administrators via this page and are then accessible by all users.

When a shared roster is added, users can link to it via the Add Rule page.

Any changes to a shared roster will be applied to users who have previously linked to the roster. When a shared roster is deleted, then it will no longer appear for users who linked to that roster.

20 Enter a name for the shared roster, then select the locations for the roster

Add Shared Roster

Save
Cancel

Roster Name
Cedarwood Corner

Alerts

- Rodent Alert
- Service Alert
- Leak Alert
- Temperature Alert


Incident Stage


- Created
- Assigned
- Started
- Completed
- Timed-out
- Canceled

Locations

- All customers
- Only for the following customers
 - Cedarwood Corner
 - Riverfront Plaza
 - Willowbrook Junction

21 IMPORTANT - Click "Save" to add the new shared roster



Settings 

Add Shared Roster

Save
Cancel

Roster Name
Cedarwood Corner

Alerts

- Rodent Alert
- Service Alert
- Leak Alert
- Temperature Alert

Incident Stage

- Created
- Assigned
- Started
- Completed
- Timed-out
- Canceled

Locations

- All customers

22

To link a user to the new shared roster, return to the Notification Rules page, then click "Add New Notification Rule" and select the desired user

The screenshot shows the EverSmart Settings interface. At the top, the EverSmart logo is on the left, and a gear icon is on the right. Below the logo, the word "Settings" is displayed. A navigation bar contains tabs for "Users", "Notification Rules", "My Profile", "Shared Rosters", "Test Notifications", and "Help". The "Notification Rules" tab is active. Below the navigation bar, it says "2 active of 2 configured".

The main content area is titled "Notification Rules". It features a table with columns: Active?, Alerts, Stages, Locations, User, Contact Methods, Schedule, and Timezone. There are also buttons for "Add New Notification Rule", "Download", and "+ Add user". A dropdown menu is open over the "Add New Notification Rule" button, showing "Chris Smith" as a selected user.

Active?	Alerts	Stages	Locations	User	Contact Methods	Schedule	Timezone	
	yes	rodent	Created	all	Chris Smith	Work Phone	Work Hours	America/New_York
	yes	rodent	Created	all	Chris Smith	Work Email	Off Hours	America/New_York

23 Check the "Link to shared roster" checkbox, then pick which roster to link to.

When the user links to a shared roster, they can set up their own contact methods and schedule, but the other settings (especially the locations!) will come from the shared roster

Don't forget to click the "Save" button!



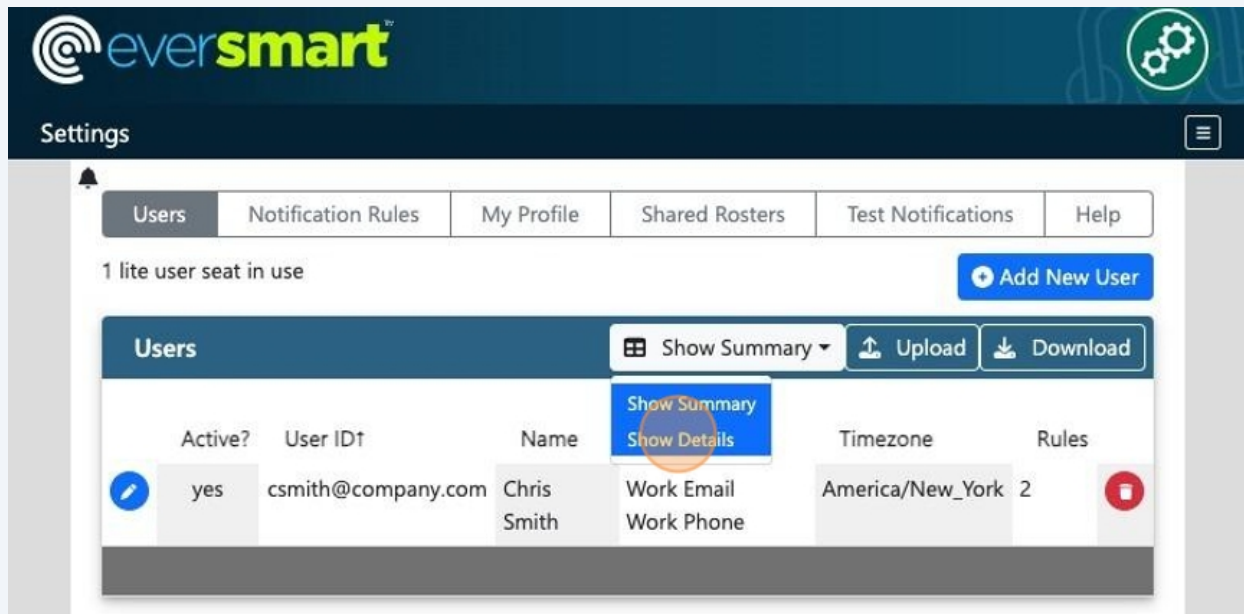
The screenshot shows the EverSmart Settings interface. At the top, there is a dark blue header with the EverSmart logo on the left and a gear icon on the right. Below the header, the word "Settings" is displayed on the left, and a hamburger menu icon is on the right. The main content area is titled "Add Rule for Chris Smith" and features a blue "Save" button and a grey "Cancel" button in the top right corner. The settings are organized into several sections: a "Link to shared roster" section with a checked checkbox and a radio button selection for "Cedarwood Corner" (highlighted with an orange circle); an "Active" section with a checked checkbox; an "Alerts" section with radio buttons for "Rodent Alert", "Service Alert", "Leak Alert", and "Temperature Alert"; and an "Incident Stage" section with checkboxes for "Created", "Assigned", "Started", "Completed", and "Timed-out".

24 If you have a large number of users, continue reading to learn how to "Upload" all users in a single step

25

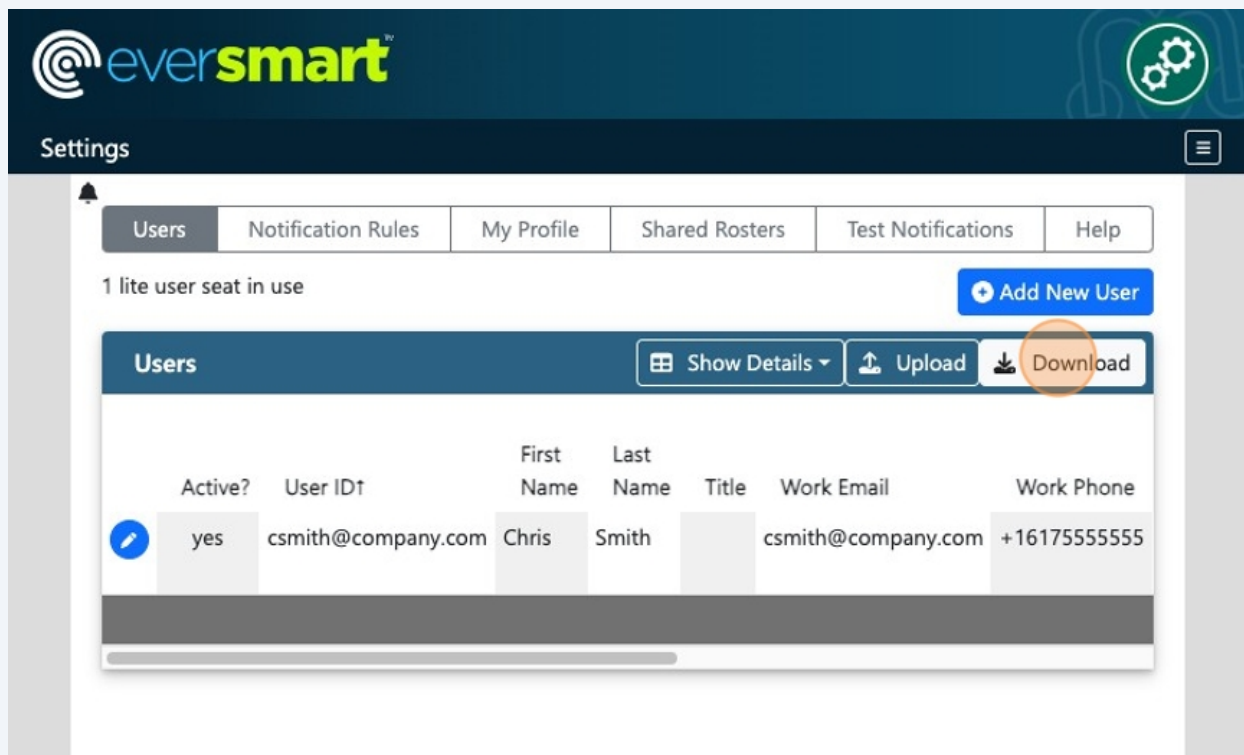
The first step is to create an example CSV file that will show you the correct format for the upload file.

Go to the Users tab, then click the "Show Summary" button and pick "Show Details"



26

Click "Download"



27 Open the example csv file using the spreadsheet editor of your choice.

Now create your own spreadsheet with your list of users using the same column names. When you are done creating your spreadsheet, export it to a csv file.

IMPORTANT - you must export with the header row or the app will not be able to upload the users correctly

i The only rules that will be created by the Upload are rules linked to shared rosters. For this reason, we recommend using shared rosters in conjunction with the Upload feature.

i The order of the columns is not important.

The "User ID" column is required and must contain a valid email address.

Any text within the "Links" column must be a comma or newline delimited list of existing shared roster names. The shared roster names must use exact spelling and casing. Any discrepancies will not allow the user to be added.

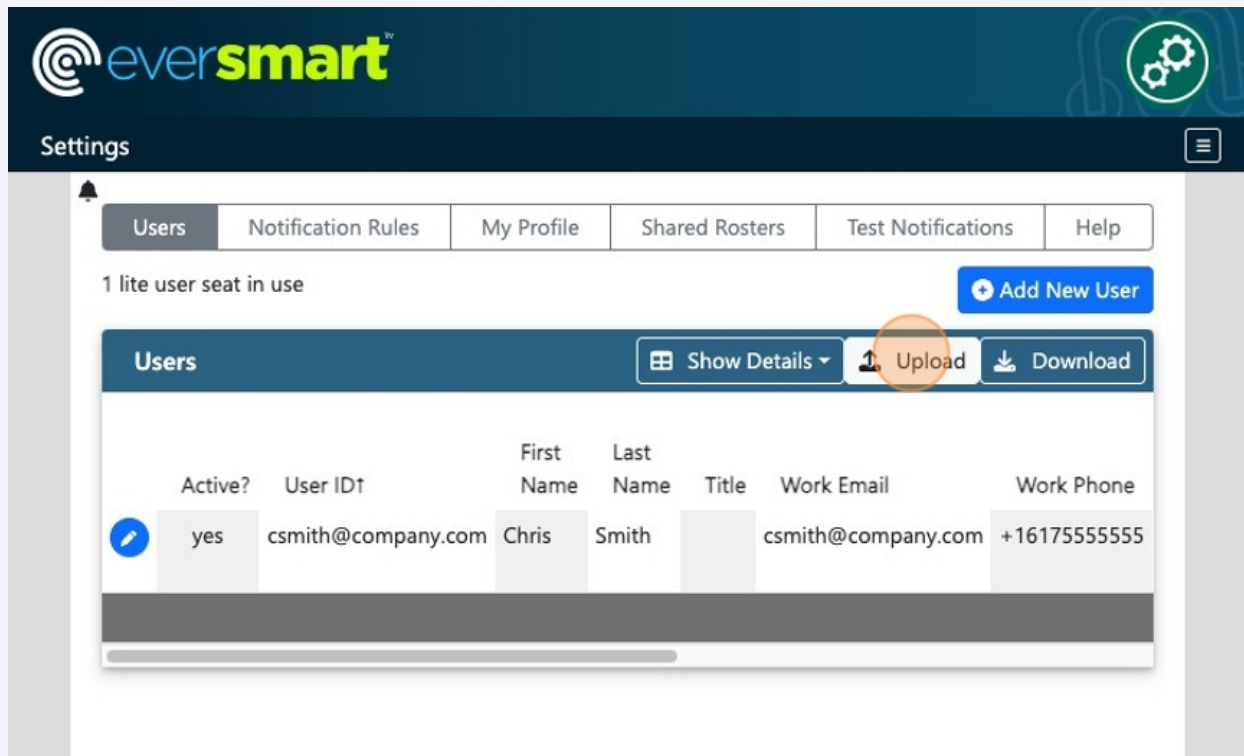
If the timezone is not supplied, the timezone of the browser will be used instead.

If the "Work Email" is not supplied, the "User ID" will be used for the work email instead.

All other columns are optional.

If a user already exists, then the existing user will be updated with the settings from the uploaded file.

- 28 When you are ready to upload the users csv, click the "Upload" button.



- 29 You will be prompted to approve the changes before they are saved to the server.

