

## Using Swift Sensors Sub-Accounts

With Sub-Accounts, you can organize your Swift Sensors system into a hierarchy of “parent” and “children” accounts for simplicity of navigation, separation of user access, and billing differences. For example, resellers can maintain a single Swift Sensors account and organize each for their customers into a sub-account (and if some of their customers have multiple locations, you can create multiple layers of hierarchy of sub-accounts) Or, owners of multiple franchise quick-service restaurants can put each location into a sub-account so they can be managed independently – enabling the manager of each location to view only their location and manage their system without the distraction of viewing many other locations in the system.

When creating sub-accounts, you should understand the rules for access and notifications to help you craft your strategy and implement it quickly and easily. In this paper, we will explain how users, sensors, thresholds, and notifications work across and down a hierarchy of sub-accounts to help you set up your system optimally.

### **Sub-Account Access Rules:**

Before we discuss the tactics for setting up sub-accounts, It’s important that you understand the philosophy and rules for sub-account access:

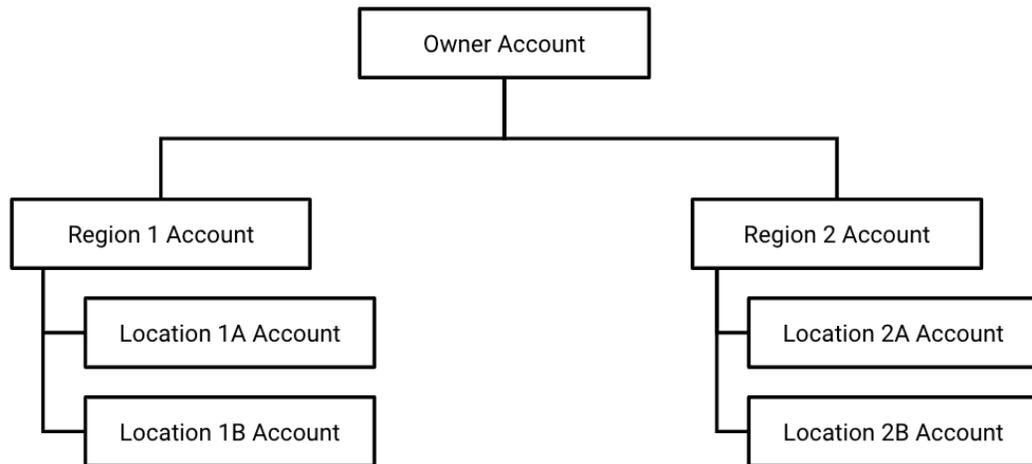
1. Users can view/edit data and settings in their account, and any sub-accounts below them in the hierarchy. Users cannot view or access data and settings in sub-accounts in other branches across the hierarchy, or in parent accounts above their sub-account.
2. Sensors and Gateways can be assigned to one sub-account only.
3. Thresholds and Notifications can be assigned to one sub-account only. However, Notifications can be tied to measurements in any sub-account below them in the hierarchy – so if you are running the overall operation from a master parent account, you can create your own notifications that will alert you of any issue from any of the sensors/measurements from any of the sub-accounts that roll up to your master account.
4. When splitting an existing account into sub-accounts, you can “migrate” users, sensors, and thresholds down to a sub-account (so you do not have to recreate all of your setup options again). A multi-account admin can migrate any gateway to any account to which they have access. When a gateway migration is performed, the Swift Sensors system automatically brings along the gateway’s current child sensors and also copies any thresholds used by the child sensors’ measurements to the destination account.

In the near future, Swift Sensors will add the ability to easily migrate users, sensors and thresholds. In the meantime, these items can be migrated manually by deleting them from the source account and adding them to the destination account.

### Example Scenario:

To better understand how these rules are put into practice, consider the following scenario:

1. Owner of multiple restaurant locations - A restaurant operator who owns 4 separate franchise locations. The owner has these 4 locations organized into 2 regions (Region 1 and Region 2), each with a Regional Manager setup to manage the 2 restaurant locations within their region. Each restaurant is set up as a separate sub-account under each region (Location 1A and 1B and Location 2A and 2B). The structure of these sub-accounts is shown below:

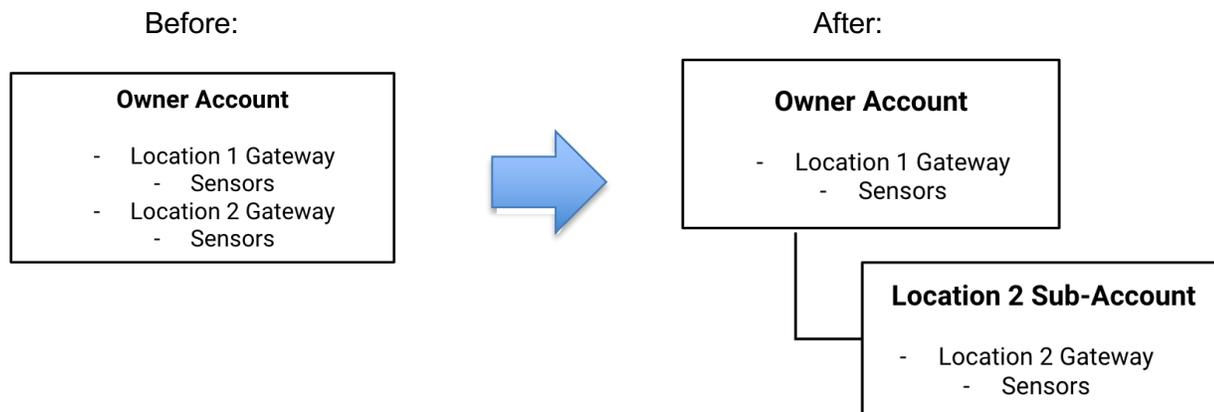


- a. Each Regional Manager can access and view the data in the sub-accounts below them in the hierarchy.
- b. Regional Managers cannot access or view the data in any of the sub-accounts assigned to their counterpart.
- c. The Owner can view the data in any of the sub-accounts in both regions because they all roll up to the main parent account. Owners and Regional Managers view data by clicking into the sub-account.
- d. Gateways, Sensors, Measurements, and Thresholds appear in only one account. In this example, the Location Accounts 1A thru 2B are the only sub-accounts that have Gateways, Sensors, Measurements, and Thresholds associated.
- e. The Owner and the Regional Managers can set up notifications in their respective accounts that are tied to a sensor measurement in any of the sub-accounts below them. For example, the owner can create a Notification in the Owner Account that will notify him/her of any measurements that exceed normal operating levels within any of the sub-accounts.
- f. The Owner or Regional Managers can click into any of the Location sub-accounts assigned to them to view data, run reports, or configure settings.
- g. The primary features of the parent accounts (Owner Account, or Region Accounts) are to view summary data for each of the sub-accounts and set

notifications that are supplemental to the notifications that exist in the individual Location accounts.

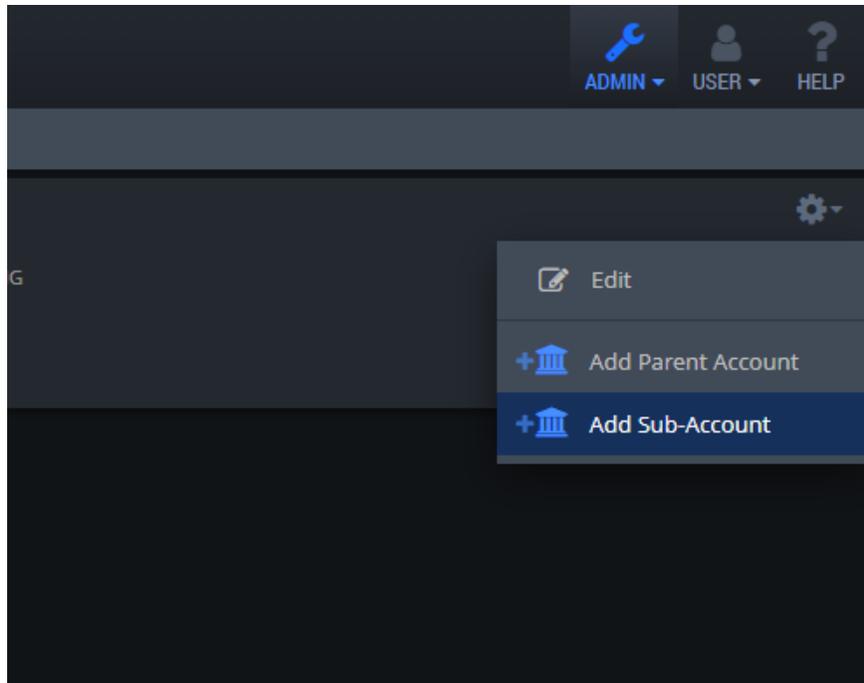
### Migrating from a Single Account to Sub-Accounts

If you have one account currently and you would like to split it into sub-accounts, the following steps will help you understand the process. In this example, the Owner Account has two gateways with sensors connected. The Owner would like to migrate one of the gateways to a new sub-account to give control and management of it to another user. Perhaps the owner has hired a manager for Location 2 and is now setting up a separate sub-account so that manager can monitor the system and receive notifications without having to give him/her access to the details of Location 1.



Use the following steps to create a sub-account and migrate hardware and settings to it. In this example, the Owner Account has all gateways, sensors, and thresholds/notifications setup and working as desired. The goal in the migration process is to limit the amount of rework required to change the hierarchy and ownership of the account.

1. **Create a Sub-Account** - Select “**Accounts**” from the **Admin** menu to display the settings panel for the Owner Account. Click on the **Gear** menu in the upper-right corner of the Account settings panel and select “Add Sub-Account”



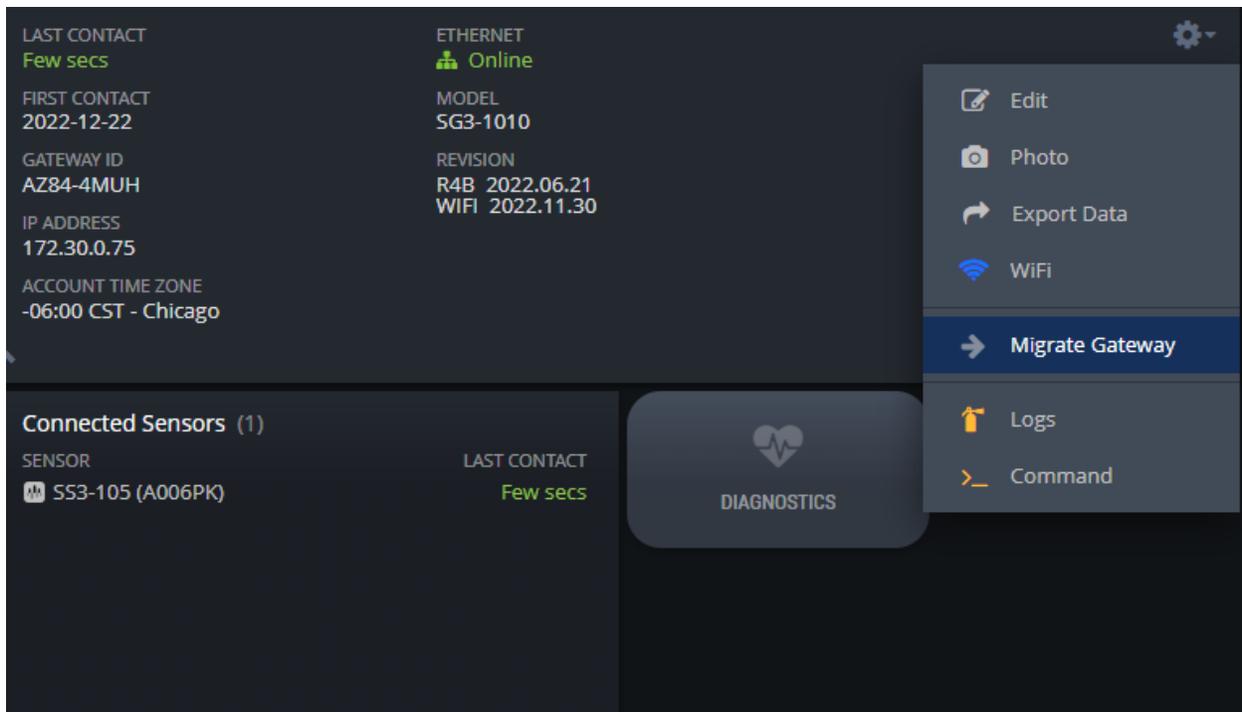
2. Name the Sub-Account “Location 2” and click the checkmark button.

A screenshot of a dark-themed form titled 'ADD Sub-Account'. The form has a close button (X) in the top right corner. It contains the following fields and controls:

- PARENT ACCOUNT:** A dropdown menu showing 'Pasquarette' with a building icon.
- SUB-ACCOUNT NAME (COMPANY):** A text input field containing 'Location 2'.
- LANGUAGE:** A dropdown menu showing 'English'.
- TIME ZONE REGION:** A dropdown menu showing 'America'.
- TIME ZONE:** A dropdown menu showing '-06:00 CST - Chicago'.
- STATUS:** A checkbox labeled 'ENABLED' which is checked.

At the bottom of the form, there are two buttons: a grey button with a close icon (X) and a blue button with a checkmark icon.

3. Click on the **List** item in the Navigation Bar to view the Hardware list for the Owner account. Click on the Location 2 Gateway to highlight the Gateway settings panel.
4. Click on the **Gear** menu on the Gateway settings panel and select “**Migrate Gateway**”



5. Select the Location 2 Sub-Account from the tree menu to move the Gateway and all of its sensors over to the sub-account.  
Note: When you migrate a Gateway, it will also migrate any of the sensors that are currently connected to that Gateway. If you need to split sensors between sub-accounts, refer to the note later in this document to learn how to do that.
6. Select the **Thresholds** item from the Navigation Bar. Notice that any Thresholds that were associated with the sensors that were migrated have also been replicated in the new sub-account. Keep in mind, these thresholds are copies of the threshold settings from the Owner Account - they now exist in both accounts because thresholds can be tied to multiple sensors that exist in multiple sub-accounts. For this reason, we automatically copy over any thresholds so you don't have to recreate them in the sub-account. Any thresholds that have been copied from a parent account as part of the migration process will show an asterisk next to their name. The threshold description will show which account the threshold came from.

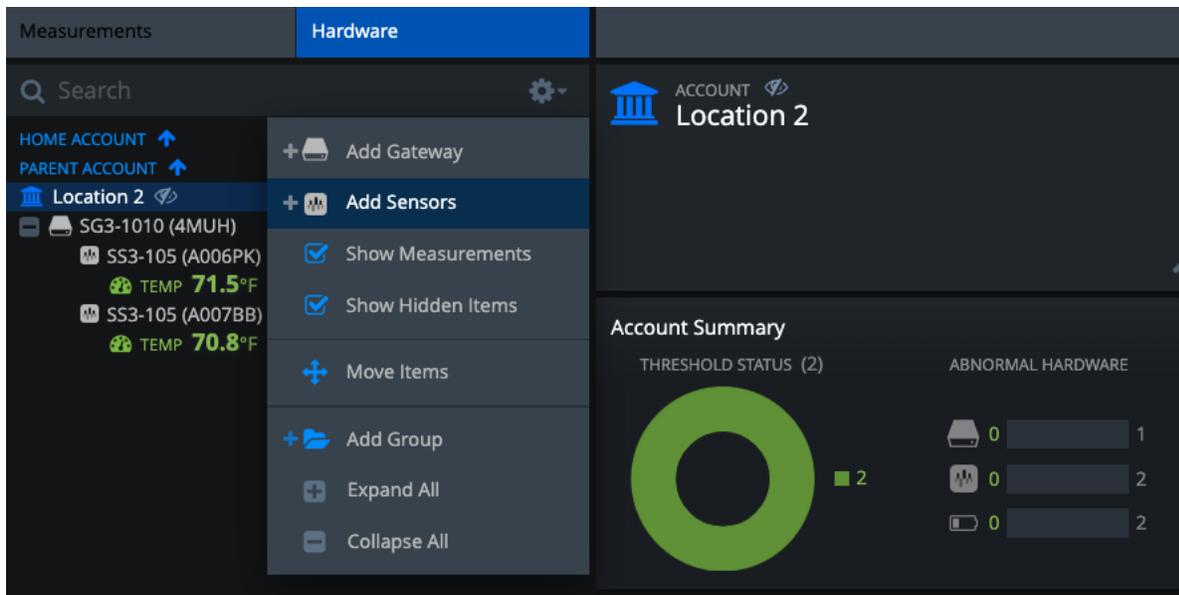


7. You will also notice that notifications and users have NOT been copied over. You are free to re-create users in the new sub-account (which requires you to delete the user in the current account and re-create from scratch in the new sub-account and then validate the user's email address). Because this process is time-consuming, you can instead choose to migrate users over from one account to another. To do this, you must send a request to Swift Sensors Support ([support@swiftsensors.com](mailto:support@swiftsensors.com)). We do not allow users to do this migration on their own because it could impact user security. Swift Sensors will add the ability to migrate users in the near future, but this ability will be restricted to multi-account admin users only.
8. If you would like the Owner Account to be able to generate notifications that notify users in the Owner account (i.e. the Owner of the two locations would like to be notified if any temperatures reach critical levels in the Location 2 account as a backup to the local manager of that location), you can do this by creating a notification in the Owner account. You will notice that when you associate this notification to a measurement, you can select from the measurements in the Owner OR Location 2 Sub-Account.

### Splitting Sensors Between Sub-Accounts

When you migrate a gateway from an account to a sub-account, all of the sensors connected to that gateway will migrate to the new sub-account as well. If you realize that some of those sensors actually should stay in the original account, you have to delete them from the sub-account and then add them back to the original account.

1. Click on the sensor to be moved. Click on the Gear menu for the sensor to display the sensor settings. Click on the Trash Can button to delete the sensor at the bottom of the window.
2. Move the sensor close to the Gateway you would like to connect it to, turn the sensor on, and wait one minute to allow the sensor to be detected.. (Sensors and Gateways make “smart” connections – meaning they communicate with the Gateway that has the strongest signal visible to that sensor. Close proximity ensures that the sensor connects to the appropriate gateway.)
3. Select the Hardware tab in the List view. Click on the Gear menu and select “Add Sensors”. This command triggers the gateway to look for new sensors to add to the account. Your sensor should appear in the list. Select it and it will be added back to the original account and connect to the nearby gateway.



### Subscription Renewals

One additional benefit of separating your system into sub-accounts is you can have different subscription renewal dates for each sub-account. In the case of a reseller, you can manage each of your customers in a sub-account with a different billing cycle for each. Contact Swift Sensors directly to specify individual renewal dates for sub-accounts.

By following these steps, you can split an account into two - a parent and a sub-account - in order to split the management of the sensors between these two locations.