**SOP** **Number** Voy04

**SOP** **Title** Terminating User

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **NAME** | **TITLE** | **SIGNATURE** | **DATE** |
| **Author** | Isaac Samaya | Support Specialist L2 |  |  |
| **Reviewer** | Abhishek Kalantri | Vice President |  |  |
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|  |  |
| --- | --- |
| **Effective** **Date:** |  |
| **Review** **Date:** |  |

# PURPOSE

The Human Resources Team will send several termination emails throughout the week. This Email goes out to Yardi Support, IT, and a few others. When we receive a termination email list we would need to then Look up the user within Yardi, RentCafe, First Advantage, and ClickPay to deactivate their users. I have listed below how to terminate a user in each of these systems.

# SCOPE

When a Employee is no longer with the company all his accesses needs to be revoke

# DEFINITIONS

Termination of the users in the system.

# RESPONSIBILITIES

# AGA team will assess the request and accordingly terminate Users.

# SPECIFIC PROCEDURE

**Yardi**

• You will first need to search for the user

• Once the User has been located you will want to check the Termination box > Change property to “testcano” > Save

A screenshot of a computer

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**System Attributes**

* Depending on the users Title you may also need to remove their name from the “system attributes” list.
  + Search bar > Search “System Attribute” > Select Attribute Name > Submit

Graphical user interface, application, website

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* You will locate the Employee name and delete it > Save > Click Ascending > Save > Renumber by 1 > Save.

Graphical user interface

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**Property Attribute:**

* Depending on the users Title you may also need to remove their name from the “Property attributes”.

**Property Contact:**

* As per user job title need to remove the user from the property role contacts.
  + Review Property > Contact > Detach contact > Save

**Agent list:**

* Leasing Associate, Leasing Manager, Assistant Community Manager, Community Manager also need to remove their name from the Agent list.
  + User screen > Data > Attach Agent to Property

**Accountant, Sr. Accountant, Property Acct Manager & Prop Controller:**

* These job titles having their own dynamic property list which is included in .active property list. You may also need to remove their property list from the .active property list and can be deleted.

**Flexible Property list:**

* If any Flexible property list assigned to user, you may also need to make the Flex property list Available for future use.

**Please refer below table:**

A table of information with text

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**Remove User from property Contacts (Atlas team does not have access to SQL Report)**

Within SQL Reports you will Search “Remove Employee from Properties”

Graphical user interface, text

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* Property “.active” > Role “User’s Tile” > Employee “employee code” > Report Only “No” > Submit.

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**RentCafe:**

You will need to terminate users in RentCafe as well. You will search for the user and deactivate the user. Please follow the steps below.

* Company Management > User Management > Select Site Managers > Search

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• Search for the User > Select the Edit Button

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• You will then check the “Disabled Login” box > Save

**YardiOne:**

* Go to YardiOne > Admin Settings > Click on User and search the user you want to inactivate.
* Then go to Provisioning tab and Select Elevate and click on inactive
* Then Go to User Tab and click on Inactive.

# FORMS/TEMPLATES TO BE USED

N/A

# INTERNAL AND EXTERNAL REFERENCES

N/A

* 1. **Internal** **References**

N/A

* 1. **External** **References**

N/A

# CHANGE HISTORY

N/A

|  |  |  |  |
| --- | --- | --- | --- |
| **SOP** **no.** | **Effective** **Date** | **Significant** **Changes** | **Previous** **SOP** **no.** |
| V.1 | 05/21/2024 | New SOP | N/A |
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