**SOP** **Number** Voy.03

**SOP** **Title** - Client User setup.

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| --- | --- | --- | --- | --- |
|  | **NAME** | **TITLE** | **SIGNATURE** | **DATE** |
| **Author** | Amol Risbud |  |  |  |
| **Reviewer** | Abhishek Kalantri |  |  |  |
| **Authoriser** | Shanette Silva | Director of Software Support |  |  |

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| **Effective** **Date:** |  |
| **Review** **Date:** |  |

# PURPOSE

Ownership/Client users need access to Yardi Voyager

# SCOPE

# Assess requests where a need is presented for a Yardi Voyager and ownership properties access.

# DEFINITIONS

# Ownership – Client users

# RESPONSIBILITIES

# AGA team will assess the request and accordingly set up the Client Users contact with appropriate Property or Property List.

# SPECIFIC PROCEDURE

1. Requests may come from the below users groups, however approval to create user must be received from Shanette prior to creating the user. Aaron Cooper can be consulted in Shanette’s absence.
   1. Ops – RM, RVP, VP
   2. Transitions - Amanda Yarborough/ Amy Van Daalen
   3. Client Services - Merrcy Moore
2. No approval from Shanette/Aaron needed if the request is received from the below contacts
   1. Merrcy Moore
   2. Amanda Yarborough/Amy Van Daalen
   3. Terra Crowley
   4. Heather Sizemore
3. Auditor requests should be directed to Shanette where she will loop in an Accounting VP for approval.
4. Ask the requester to provide the user’s name if not mentioned in the ticket.
5. Review the user in the system if already exists.
6. You can also check the user from backend by running the query.
7. Go to Administration > Add User. Please refer below screen snap-

A screenshot of a computer

Description automatically generated

A screenshot of a computer

Description automatically generated

**Graphical user interface, text, application

Description automatically generated**

**Graphical user interface

Description automatically generated with medium confidence**

1. Read Only check box is mandatory.
2. Client User Code- Client user code should start from “o.”
3. After creating the user in Yardi it needs to map in YardiOne and assigned the group “Client”.
4. Client users are not using Okta to login into YardiOne. We need to provide them with login steps.

[yardi.rpmliving.com](http://yard.rpmliving.com/)

# 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

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