

SOP 10 | People and access

Maintain people and property access

Keep contact records and property roles accurate.

For Web and mobile · Administrator / Supervisor

Before you start Supervisors can manage property roles at their own properties. Organization-wide contact and account security controls remain administrator-only.

Open People or Manage > People administration

Step 1 Find the person

Search People by name or email and open the correct person. Check the identity before editing.

Step 2 Update contact details

Where available, edit the contact fields and enter the reason. Save the contact change and wait for confirmation.

Step 3 Review each property role

Open the property access controls. Choose the intended role or remove access using the available options. An organization-wide role may also grant access.

Step 4 Save the property change

Enter the required reason and save or confirm the change. Reopen the person and check the resulting property role.

Step 5 Review training separately

Open Property access & training for work eligibility. An account or property role alone does not establish eligible training.

Check your result The person's saved contact details and intended property scopes are shown.

If something goes wrong If you cannot manage a listed property, ask an administrator who can. A preferred/default property does not grant authority.

See the picture reference on the next page.

SOP 10 Picture reference

Maintain people and property access

Amelia Taylor

Activation pending

showcase.associate09@example.test

ContactAccess & trainingAccount

Contact details

First name

Last name

Phone · optional

Reason for change

Example: Added to the weekend team

Review contact changes

Step 2 · Open the person, choose Contact or Access & training, and review changes before confirming.
Application screenshot with training data.