A Practical guide on Yardi Breeze by Meru Accounting

Contents

1. About Yardi Breeze 3
2. Create a trial account for this software 4
2.1 Logging in Yardi Breeze 4
3. Learn this Software 5
3.1 Learn about Yardi Breeze 5
3.2 Contact Support 5
3.3 Language Switch 6
4. Functions of Yardi Breeze 6
4.1 Marketing & Leasing 6
4.1.1 Showcase your listings under a single platform 7
4.1.2 Process the tenant applications 7
4.1.3 Tracking Status of the Tenants 8
4.1.4 Communicate with Tenants Easily 9
4.2 Set up & Support 9
4.2.1 Adding a New Property 9
4.2.2 Adding a new owner 10
4.2.3 Contact the Support Team of Yardi Breeze 11
4.2.4 Yardi Breeze Help Centre 12
4.3 Owner Tools 13

4.3.1 Owner Portal 13
4.3.2 Upload Property Documents 14
4.3.3 Owner Statement 15
4. Accounting 16
5. FAQs Regarding Yardi Breeze 17
6. Endnotes 17

1. About Yardi Breeze

Yardi Breeze is a software company which provides solutions for portfolios & organizations. It is easy to set up software which you can easily operate with basic knowledge. It is a property management software which you can use for managing properties. Yardi Breeze accommodates different kinds of properties for management.

Yardi Breeze provides solutions for the following kinds of properties

- Residential Properties.
- Commercial Properties.
- Affordable Pricing Properties.
- Self-storage Properties.
- Association Properties.
- PHA Properties.
- Manufactured Properties.

Yardi Breeze's interactive user interface allows its users to use the software for managing their business. It also provides premier software for accommodating unique business needs. It covers all the documentation requirement needed for maintaining your property.

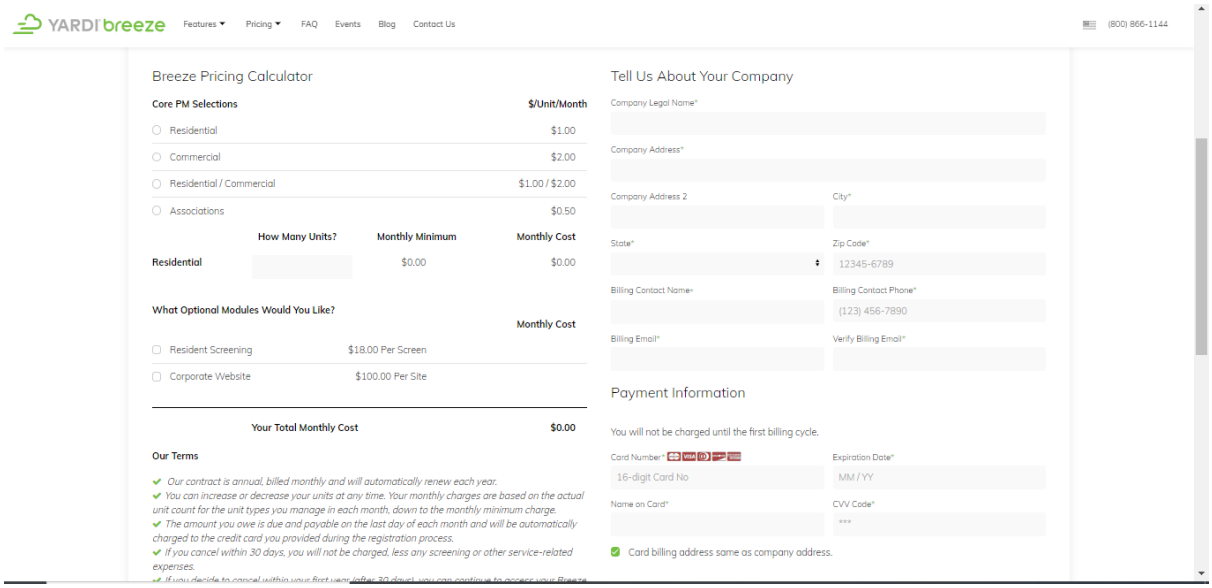
Yardi Breeze provides a platform where you can organize all the required information. Yardi Breeze provides the following services for all property types

- Easy setup.
- Property accounting.
- Compliance workflows.
- Asset & income tracking.
- Vacancy & prospect tracking.
- ILS posting.
- Online applications.

- Online payments.
- Online maintenance.
- Email & text messaging.
- Walk-in payments.
- Vendor payments.
- Owner payments & reports.

2. Create a trial account for this software

2.1 Logging in Yardi Breeze



Yardi Breeze provides an easy process for users to authenticate and start an account. You can create an account by logging in to the official website of Yardi Breeze https://ccs.yardiasp.com/breezeregistration/.

The registration page of Yardi Breeze provides the users with the following information

- Breeze Pricing Calculator

Breeze pricing calculator provides you with the total amount that you will pay. It finalises your amount after taking in your options.

You can select the type of property you want the software for. The calculator will let you know the basic price of the package according to your choice.

The calculator provides a glimpse of the monthly charges that you will induce. It also provides a separate column for selecting the “Yardi Premier”.

- Company Details

In the right column, the users find an option for filling in their company details. After selecting your plan, you need to provide details about your official organization. It provides an instrumental step as the software feeds in information directly from this database.

You can also provide the contact details of your organization in this column.

- Payment Information

After selecting the software plan suitable for your organization, you need to provide contact details too. You can provide your card details in this section for amount deduction for each month.

It gives the option to provide both debit/credit card details in this section.

After doing that, you can successfully log in to your Yardi Breeze account & run it.

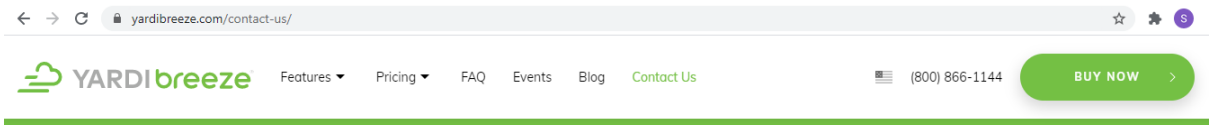
3. Learn this Software

3.1 Learn about Yardi Breeze

Yardi Breeze follows an easy & interactive user interface which is easy to learn. After successfully logging in to your account, there is a tab available for the tutorial. You can learn various features of the software through it.

The tutorial will get you acquainted with the software so you can optimize it accordingly.

3.2 Contact Support

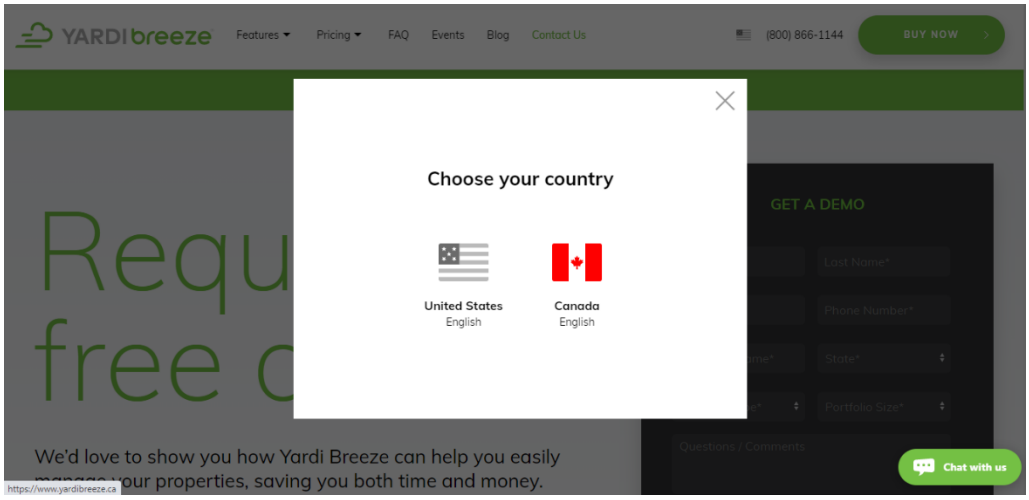


Yardi Breeze provides a separate page for addressing your grievances. After logging in to your account, you can find a separate column for support.

You can fill in your query there, and get your grievances fixed in the least time possible.

On the official website too, you can find an option for contacting the team of Yardi Breeze. You can also get a free demo through the contact support page. It will provide you with access to all the feature available in your selected plan.

3.3 Language Switch



There is an option for switching languages available on Yardi Breeze. However, a user can only switch between US English & Canada English.

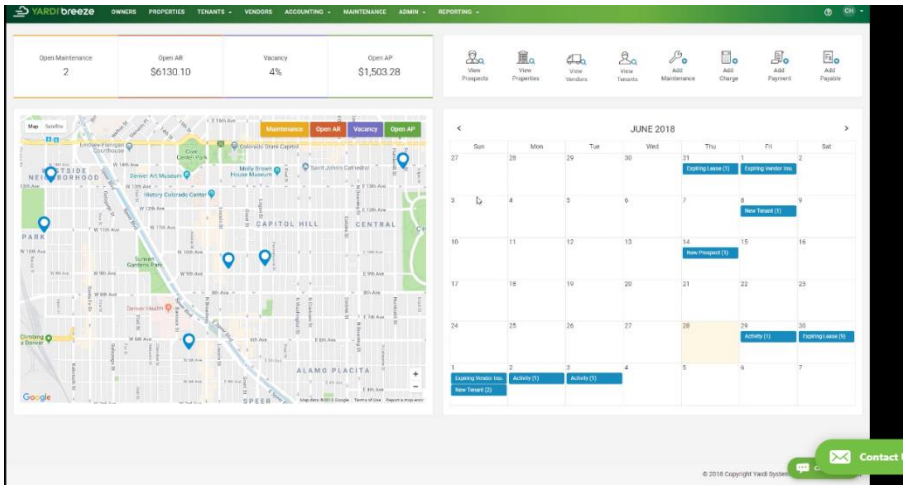
With these available options, you can choose a language according to your requirement. Selecting the other option will take you to a different portal. You can then operate on the website in the same way. the website will act the same with either language option.

4. Functions of Yardi Breeze

There are various features available with Yardi Breeze with which you can experiment. The features are diverse according to the plan you take. Some plans have limited features and some plans include all the features. it depends on which plan you have availed.

Some of the common features of Yardi Breeze available in each property are

4.1 Marketing & Leasing



With this feature, you can list your properties in an easy way. this feature allows you to take pictures and upload it for free on Rent Café.

Under marketing & leasing, you get the option to

- Showcase your listings under a single platform.
- Process the tenant applications.
- Track the status of leases.
- Communicate with tenants easily.

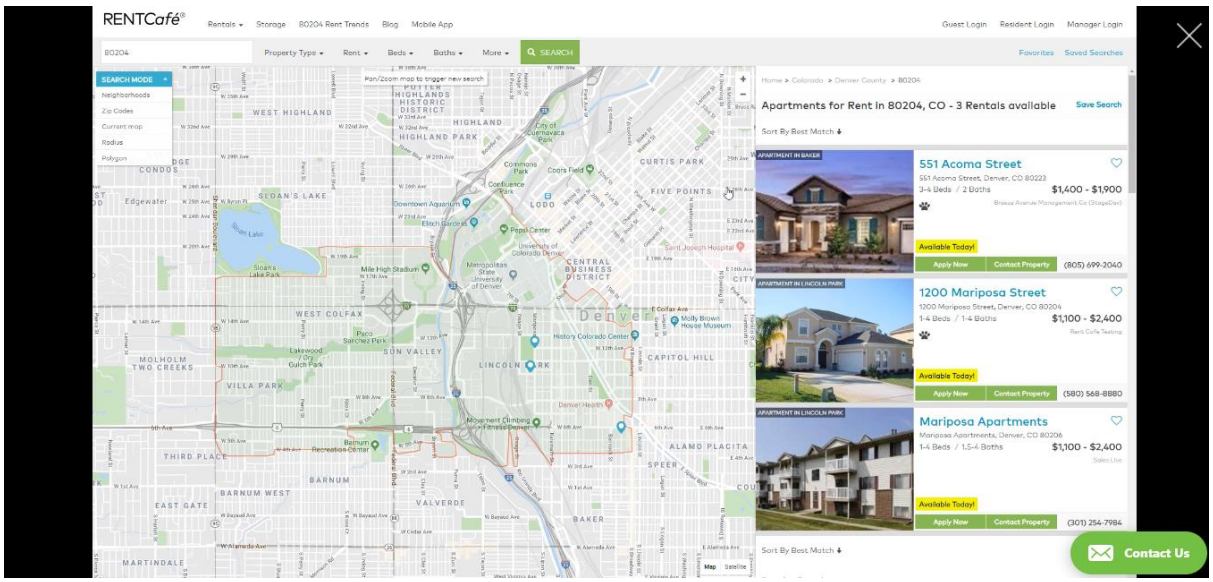
4.1.1 Showcase Your Listings Under a Single Platform

In the marketing section, you can organize the listings & categorize it on different dates. Under this section, you also get to maintain every ad campaign related to the specific property. In this dashboard, you will find every option available with a click.

Yardi Breeze also offers a separate property listing site to its users- RentCafe. With it, you can separately list down your listings and categorize them area wise too.

With RentCafe, you can

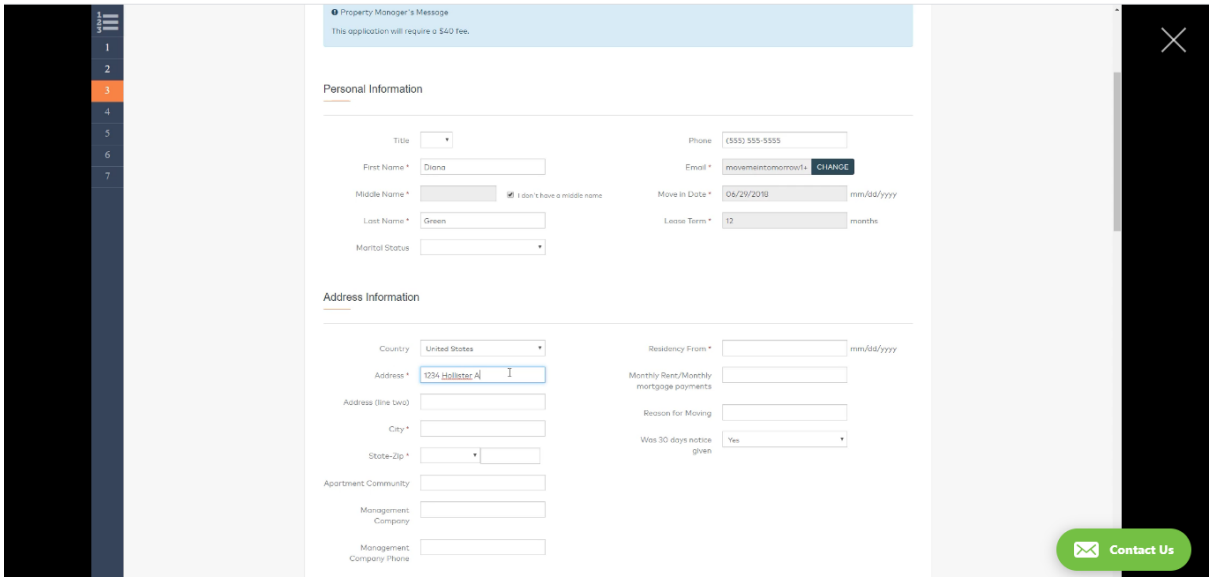
- List down all your listings under a single platform.
- Categorize them based on areas & locations.
- Sort out your different properties with the help of filters available on the top. The filters available are property type, rent etc.
- Availability of the property and its pricing is updated automatically. This way, you can operate with ease.



4.1.2 Process the Tenant Applications

on top of the right column, you will find various options to manage your applications. Tenants can apply for the units they are specifically interested in. upon selecting the unit, Yardi Breeze automatically relocates to a form available in this feature.

Tenants need to fill in their details, organisational details & payment information. Upon filling these forms, you can specifically track them with the contact information listed.

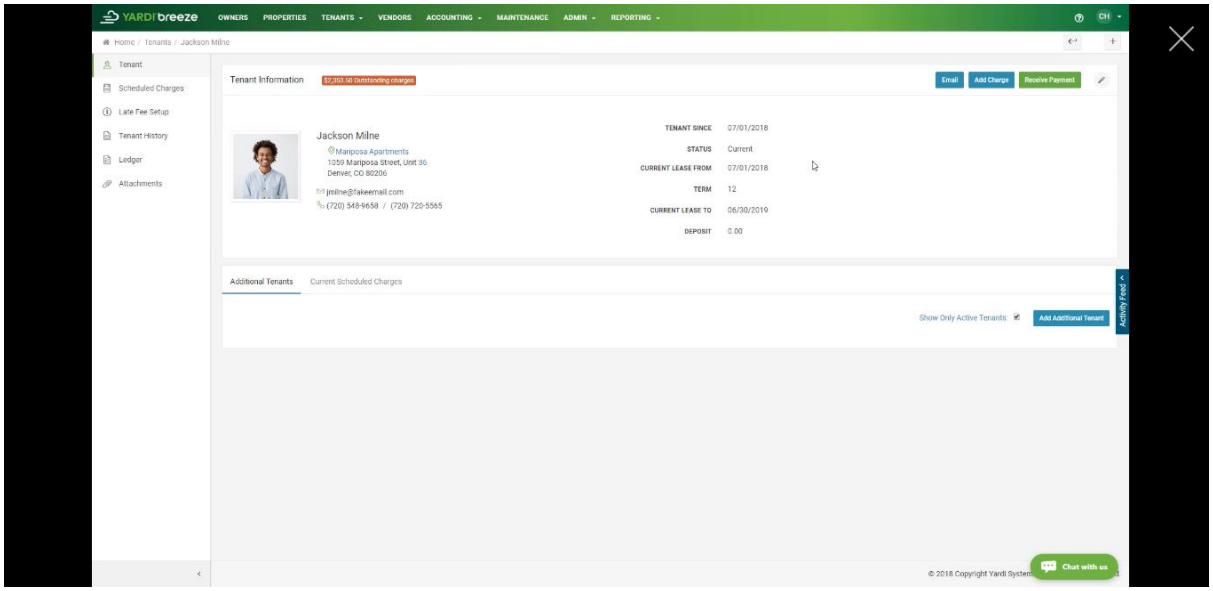


4.1.3 Tracking Status of the Tenants

With Yardi Breeze, you can track the status of the tenants easily. This feature provides a separate column for tenant information.

In this column, you can

- Track the status of the tenant application.
- Upload the necessary document of each tenant under his specific profile. The database allows you to store information. The option to record documents is present in the tenant column in the section.
- Scan the documents on the system itself.

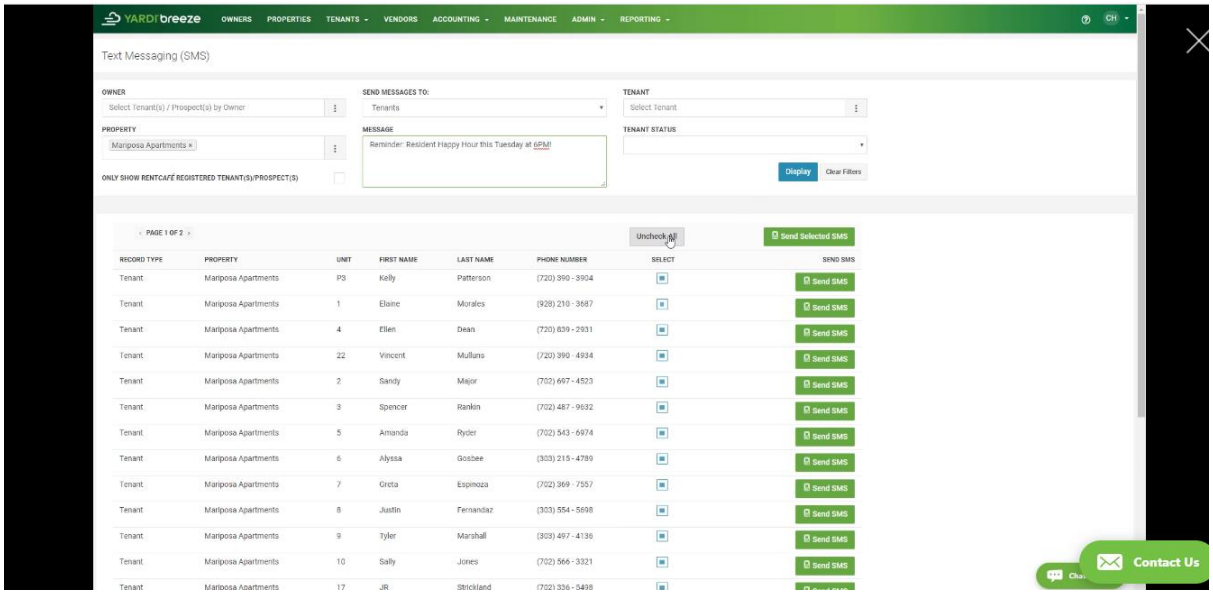


4.1.4 Communicate with Tenants Easily

With this feature, you can also maintain easy communication with the tenant. You can send an email or a text message to the tenant within this software. Under the tenant bar, there is an option of communication present with the tenant.

Selecting that will land you in the communication column. In this column, you can

- Communicate to the tenants any updates or payment reminders. It uses the contact information provided by the tenant in the database.
- Send a reminder to many tenants in one go with the help of filter option. The filter option provides various parameters under which you can select as many tenants as you want.



4.2 Set up & Support

Yardi Breeze provides a quick setup & support system with Yardi Breeze. This function provides you to

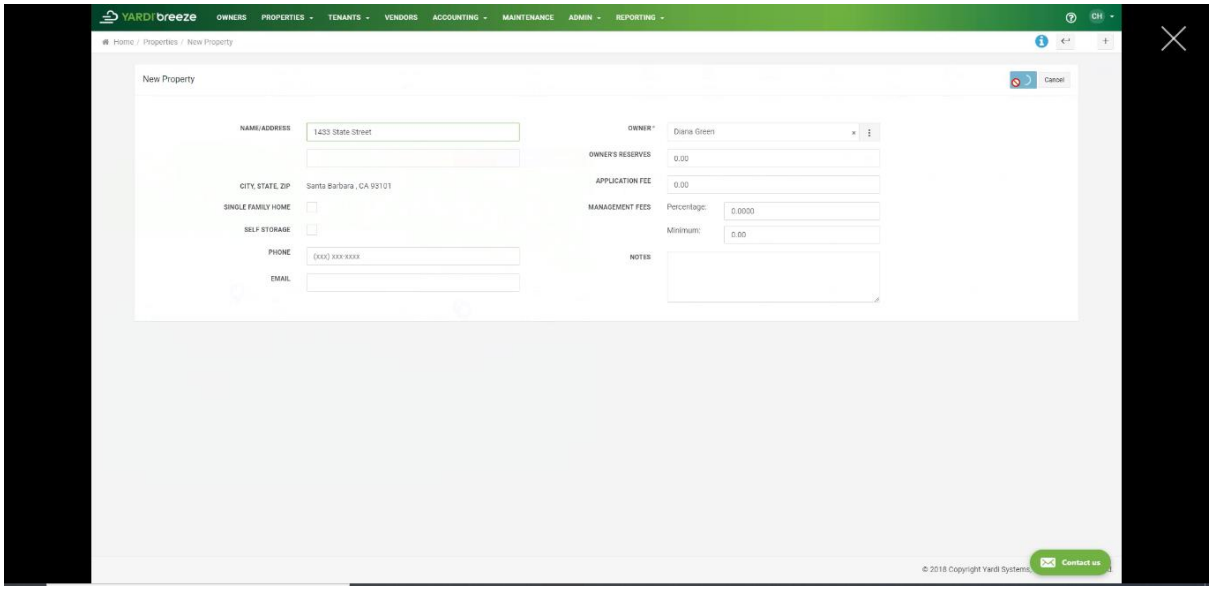
- Add a new property.
- Add a new owner.
- Contact the support team of Yardi Breeze.
- Contact the Help Centre of Yardi breeze.

4.2.1 Adding a New Property

With Yardi Breeze, you can add an owner to the software whenever you want. The software can have as many users as possible your organization requires. You can add a new property in a few easy steps.

- Under the Home tab, select the property option.
- In the property section, there is an option to add a property. Select the option.

- In the option, you can add the details of the property. It will automatically sync in the database of the software.
- In this column, you can also add the details of the owner.



4.2.2 Adding a New Owner

Similarly like a property, you can also add a new owner at any given point of time. the software allows you to add as many owners as possible for one plan.

You can add a new owner with the following steps-

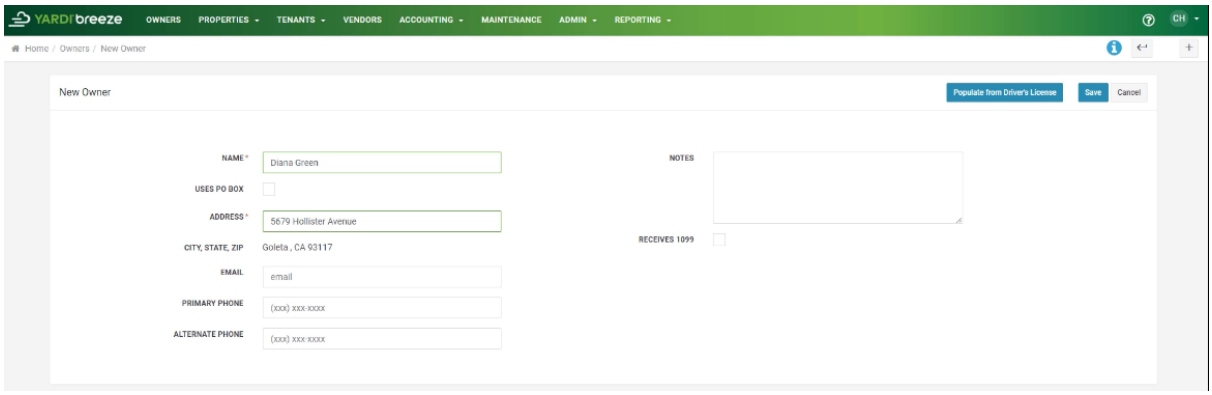
- On the main home screen, there will be a separate option available for owners.
- Selecting the owner tab will land you to a different page.
- From the owner column, select ‘add an owner’ button.
- Adding an owner will open a new form. In the form, you can add the details of the new owner.
- After adding the details, the owner needs to also upload his documents. There will be a separate option available in the form. The new owner needs to upload a scanned copy of his driver’s license. The documents are uploaded to ensure the authenticity of the owner.
- After uploading the document, click on ‘submit’.
- The database will save the details of the new owner successfully.

For mobile versions, there is an easy way to add an owner. You need to follow the following steps

- You can follow the same steps until the ‘add an owner’ option.
- After that, you can auto-fill your information using a simpler method.
- In mobile devices, there is an option available for uploading your driver’s license.

- When you upload your driving license, the software will scan the QR code present. The QR code will provide all the necessary details. And the software will auto-fill your details in the form.
- You can then click on ‘submit’ to add the owner successfully.

This is one of the fastest and hassles free way of adding an owner.



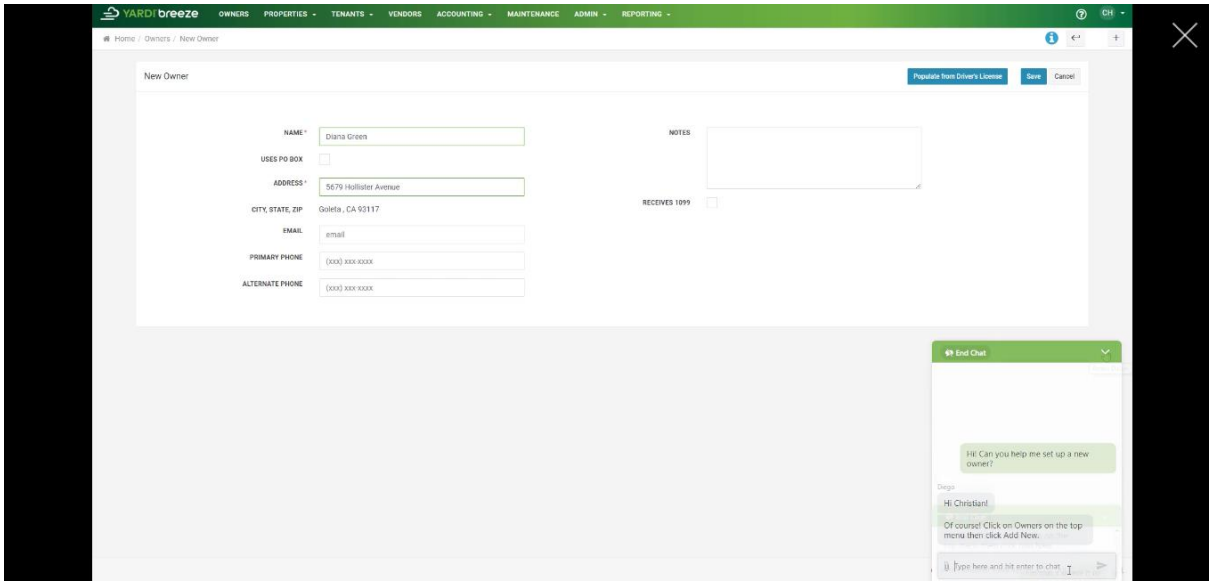
4.2.3 Contact the Support Team of Yardi Breeze

Yardi Breeze provides a separate page for solving the grievances of the customer. Upon logging in to the account, you can chat with the chatbot available with Yardi Breeze.

It will help you in processing your problem directly to the Yardi Breeze support team. It processes your request in the lowest response time available.

You can contact the support team of Yardi Breeze using the following steps-

- Log in to your Yardi Breeze account using your credentials.
- Upon logging in, you will reach the home page of your account.
- There will be an icon for the chatbot in the bottom right corner. Click on the icon.
- Selecting it will open the chat box.
- You can then type your query in the chat box to get an instant reply from the Yardi Breeze team.



4.2.4 Yardi Breeze Help Centre

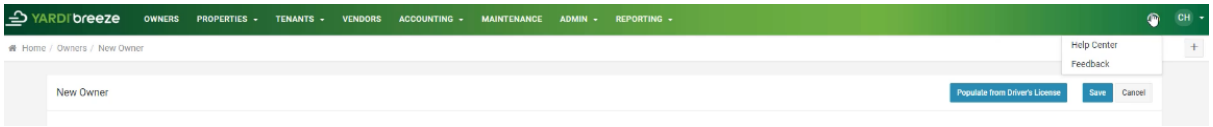
Yardi Breeze also provides a help centre for addressing the grievances of the customer on a larger scale. The help centre has hundreds of options to choose from.

You can separately choose from a range of options available. it provides a search option to find the solution for your exact problem.

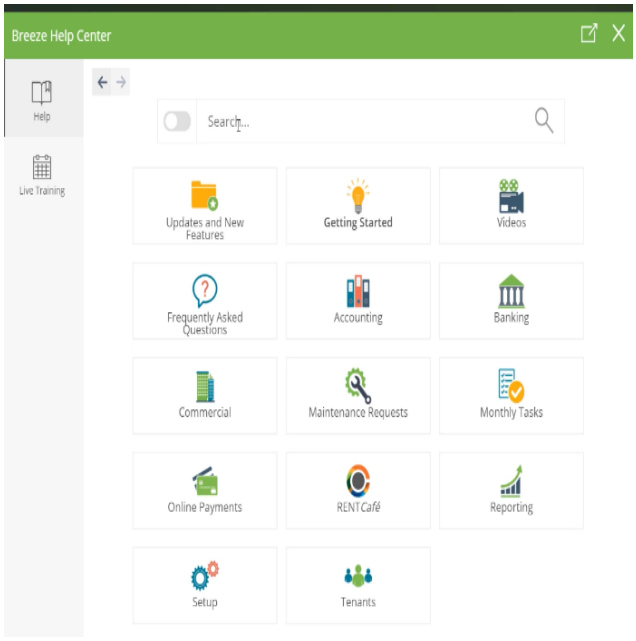
The help centre provides videos and blogs for assisting you through the problem. The help centre also provides instructional webinars to guide you through the setup of the software.

It provides a separate helpdesk for each section. Here are the steps to find the help centre in your account

- On the top column on your account, you will find a list of drop-down menus. On the top right corner on the same bar, there will be a question mark icon available. Click on it.
- Clicking on it will open a drop-down menu of two options. Click on the “help centre” option present.
- It will open the help centre for you.



In the help centre, you can choose the option surrounding your area of grievance. You can find suitable assistance there.



4.3 Owner Tools

Yardi Breeze provides various tools for the owner's use. The owner can use these tools while consolidating financial statements.

The owner's tools consist of

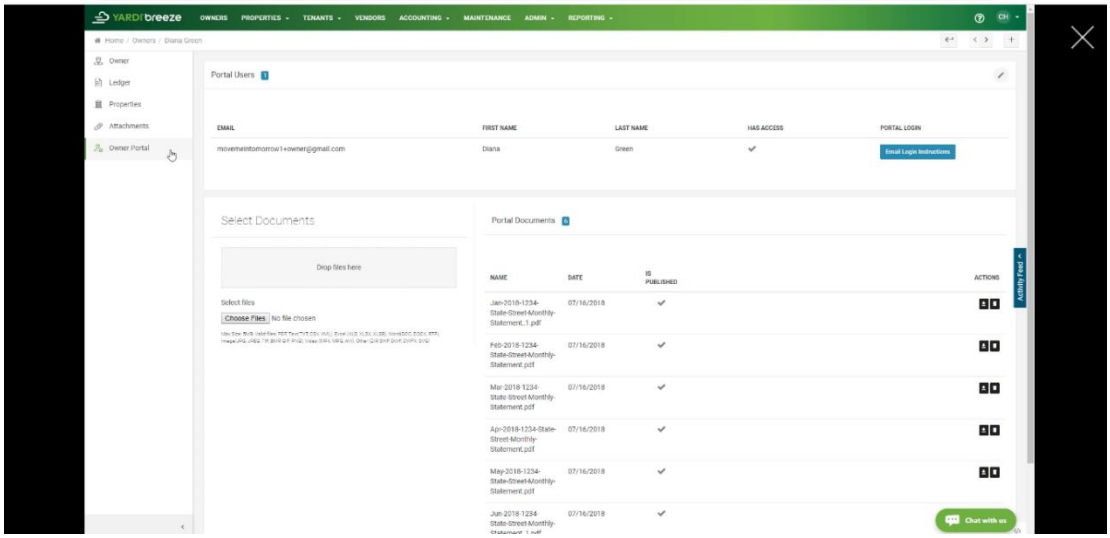
- Owner Portal.
- Upload property documents.
- Owner statement.

4.3.1 Owner Portal

Yardi Breeze provides a separate window for the owners. In this window, the owners can get classified information about their properties. With this portal, you can also get all the documents required in one single database. It can provide access to all the users based on filters.

In the owner portal, there are 2 separate columns for properties & documents. In the 'document' field, you can view different documents of every property listed in your software.

In the 'properties' column, you can check the communication status of every tenant too. This provides an easy passage to the tenant and helps in cutting down the extra steps of the communication.



The owner portal is also categorized according to different owners. So, if the owner is responsible for handling a few tenants, he will only access those tenants.

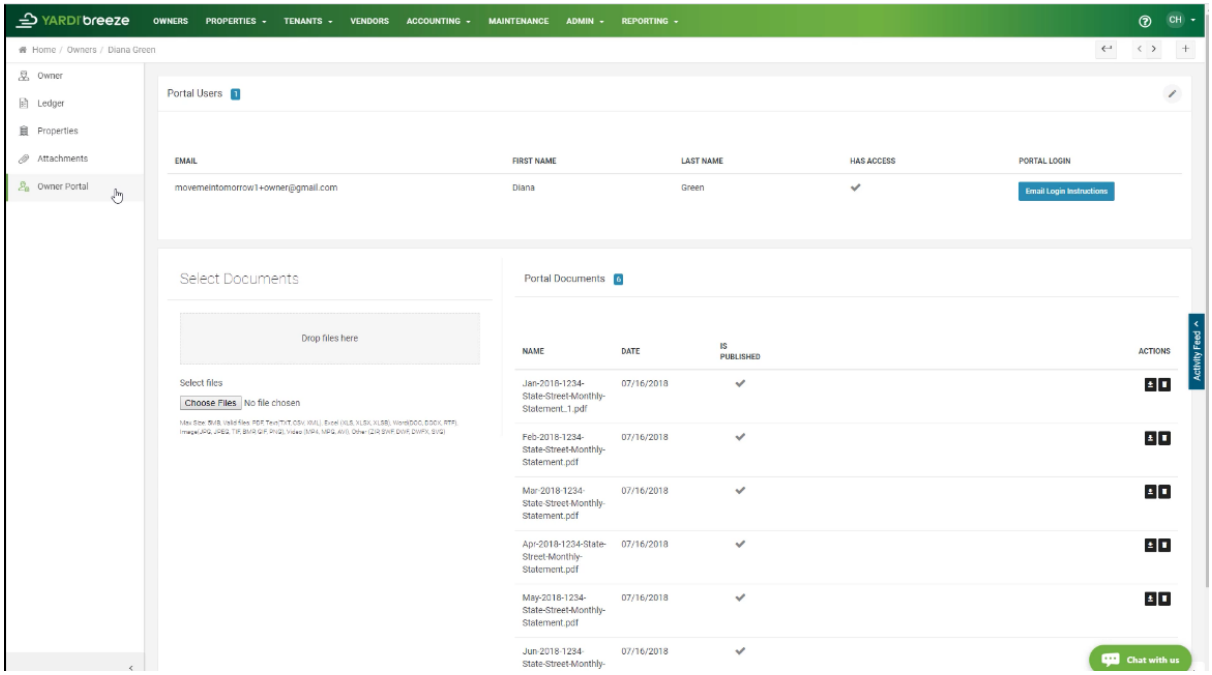
This provides the owners with appropriate authority & delegation.

4.3.2 Upload Property Documents

This is one of the most important tools of Yardi Breeze. In the owner portal, you can also upload documents related to every tenant & property. It provides a separate database where you can store the documents in one single platform.

With this tool, you can

- Upload documents against every property.
- Upload documents separately under each tenant's information.
- Classify different documents in a single portal for every property. You can also upload the updated documents with a single click on the tenant's name.
- Also communicate with different tenants without a separate communication server.



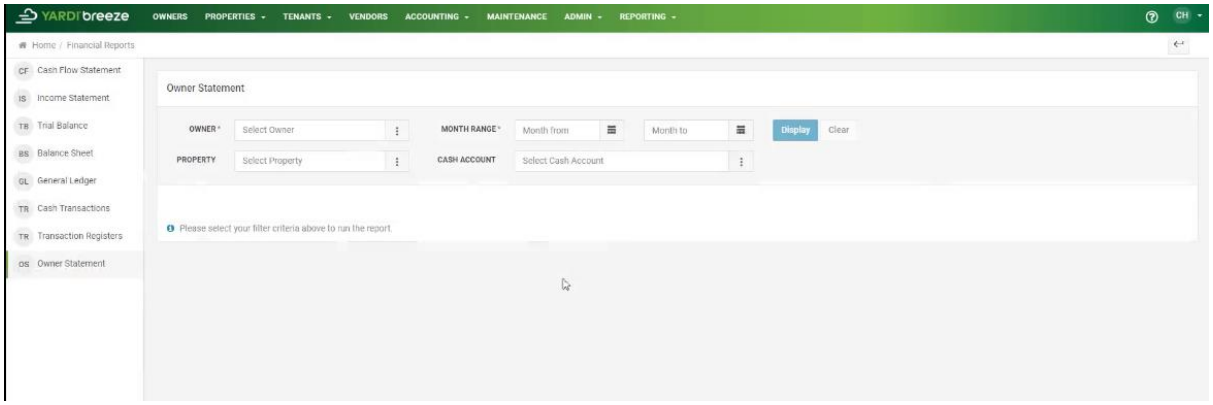
4.3.3 Owner Statement

With this tool, you can also view the consolidated financial statement of each owner separately. Under the specific owner portal, you can view your documents and statements separately. This option is available under the Home tab as well.

Here are the steps to view the owner statements separately

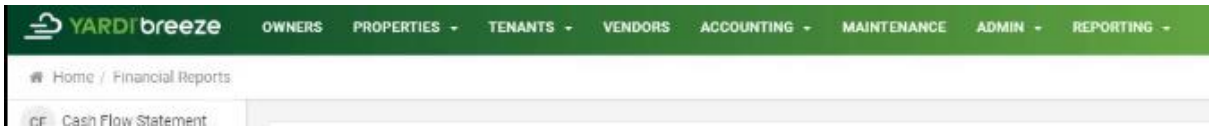
- On the home screen, you will find several drop-down menus.
- Select the ‘financial statements’ from the list.
- A screen will open showing you the several options present in the financial statements tab.
- Options which are present in the financial statements tab are
  - Income statement.
  - Cash flow statement.
  - General Ledger.
  - Balance sheet.
  - Cash transactions.
  - Trial balance.
  - Owner statement.
  - Transaction register.
- From the following options, click on ‘owner statement’ tab.
- Selecting it will open a new portal for viewing the statements.
- You can select the owner name of which you want to see the statements.
- After selecting the appropriate owner details, click on OK.
- The window will then show the monthly statement of the specific owner.

With this feature, you can view and manage the owner’s financial statements.



4. Accounting

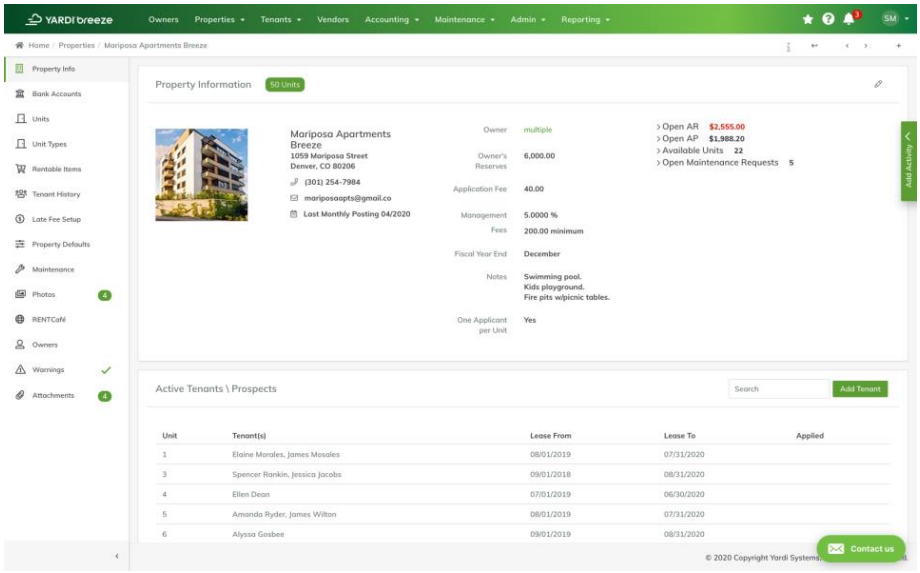
Accounting is one of the most essential steps of the organization. Yardi Breeze provides a separate column under the home tab of Yardi Breeze.



The accounting section of Yardi Breeze provides more than just debit and credit information. It foresees all the accounts of the property as well as the owners.

With the accounting tool of Yardi Breeze, you can

- Classify all the accounts under a single platform.
- Maintain the general ledger and trial balances of each transaction separately.
- Create financial statements depending on your accounting cycle. You can provide the batch statements of each campaign separately.



5. FAQs Regarding Yardi Breeze

There are some common questions regarding Yardi Breeze. Here are some of them

a. Is there any difference between Yardi Breeze & Yardi Premier?

Both the platforms, Yardi Breeze & Yardi Premier are built on the same functional software. It provides some similarities in both the platforms. But Yardi Premier is the next level software. It includes added functionality which helps the large scale organizations.

With Yardi Premier, you can get added condo features. It also provides different functionalities depending upon the type of property you choose.

b. Does Yardi Breeze charge any setup fees?

The answer to this question is no. Yardi Breeze does not include any setup charges. With the help centre tutorials that are available for free, you can setup the software. Yardi Breeze only imposes a cost on the monthly plan you choose.

You can calculate your final charges using the Yardi Breeze calculator provided on the website.

c. Does Yardi Breeze require a contract monthly?

No, Yardi Breeze does not require a contract monthly. however, Yardi Breeze does require a contract yearly. if you complete a year using the Yardi Breeze software, you will need to update your contract.

Yardi Breeze contracts include a declaration & their terms & agreements of use. The software will sign a contract with your official organization before providing you with the services.

6. Endnotes

Yardi Breeze is one of the most efficient property management software. It equips you with all the required functions needed for managing your property.

with Yardi Breeze, you can keep a constant check on all aspects of your organization. all your database and information about your properties and business dealings are available on a single platform. You can operate & communicate using the same platform. It contributes effectively to reduce your operating costs.

With Yardi Breeze, you can get your property business up & running effectively today.