

CLASS LIST



A USER CONFERENCE

REFRESH

APRIL 17-18, 2024



yardibreeze.com/refresh

DON'T MISS THESE CLASSES!

CLIENT PANELS



Our clients have the best tips and tricks for getting the most out of Breeze and Breeze Premier. Check out our NEW panel sessions featuring some of your highly successful peers. This year, we have two panels, "Risk Management Masterclass" and "Lightbulb Moments." Join us to hear real stories and examples of how Breeze enhances profitability, efficiency and tenant satisfaction.

SPOTLIGHT SESSIONS



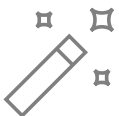
Catch our spotlight sessions featuring industry trends and issues unique to your asset class. We'll also highlight the features and products that can help your business make the most out of what is happening in your market.

ECONOMIC STATE OF THE INDUSTRY



Get a timely economic update on the issues affecting property managers and owners in 2024. Come ready with your best questions to add to the chat wall!

TOOLS YOU SHOULD BE USING NOW



In the "Favorite Features You Should Use Now" class, client services leaders will cover tools included in Breeze and Breeze Premier that you can use to instantly improve marketing, communications and operations at no extra cost.

INTRO TO THE YARDI AMBASSADOR PROGRAM



In this class, you'll learn about the perks of our client advocacy program and decide if co-marketing opportunities with Yardi will benefit your business. Join the hundreds of clients who have already signed up to be a Yardi Ambassador.



ACCOUNTING

Advanced Management Fees Setup

Accounts Payable & Accounts Receivable Reporting

Accounts Payable Overview (Breeze)

Accounts Payable Overview (Breeze Premier)

Accounts Receivable Overview (Breeze)

Accounts Receivable Overview (Breeze Premier)

Account Tree Setup

Bank Reconciliation Overview & Troubleshooting

Beginning Balances Best Practices

Financial Reporting Overview

General Ledger Review: Monthly & Annual Procedures

Gross Potential Rent Setup & Reporting

Management Fee Setup (Breeze)

Management Fee Setup (Breeze Premier)

Setup & Best Practices For 1099s

AFFORDABLE HOUSING

Affordable Compliance Reports Best Practices

Affordable Housing Spotlight

Affordable Unit Transfers

Best Practices For Rural Development Properties

Best Practices For Tax Credit Properties

HOTMA & Breeze Premier Affordable

HUD Repayment Agreements

Introduction To RentCafe Affordable Housing

Monthly Processing For 50059

Yardi Verification Services

BUDGETING

Budget Setup & Reporting

CANADA

Canada Taxation Review

Rent Control: Ontario & British Columbia



COMMERCIAL

Commercial Key Features

Commercial Recoveries

Commercial Reporting Overview

Commercial Spotlight

CommercialCafe Setup

CommercialCafe Tenant Portal Overview

Lease Clauses & Options

Retail Key Features

CONDO / HOA

Associations Key Features

Introduction To CondoCafe Owner Portals

ENERGY

Introduction To Utility Billing & Invoice Processing

INVESTMENT MANAGEMENT

Investment Manager: Investor Reporting & Portal

JOB COSTING

Job Cost Setup, Transactions & Reporting Overview

MAINTENANCE

Advanced Maintenance Requests

Introduction to RentCafe Connect

Work Orders & Inspections Overview (Breeze)

Work Orders & Inspections Overview (Breeze Premier)



MANUFACTURED HOUSING

Introduction To Manufactured Housing

Manufactured Housing Loan Tracking

Manufactured Housing Spotlight

MARKETING & LEASING

Communication Tools

CRM Setup & Queue Management

Introduction To RentCafe

Introduction To RentCafe Chat IQ

RentCafe Corporate Website Design

RentCafe & Blue Moon Leasing Workflow

RentCafe Leasing Workflow

RentCafe Leasing Workflow for NY Rent Stabilized Units

RentCafe Property Website Design

RentCafe Tenant Registration

NEW YORK

New York Property Management & Compliance

PAYABLES

Bill Pay Overview

Full Service Invoice Processing & CHECKscan

Invoice Approval Workflow Review

PAYMENT PROCESSING

CHECKscan App Overview

Online Payments Overview

Payment Processing Setup & Reporting



REPORTING

Advanced Correspondence

Correspondence Overview

Custom Tables & Ad Hoc Reporting

Monthly Reporting Packet

Owner Tools

RESIDENTIAL

Deposit Interest

Introduction To ResidentShield Renters Insurance

Introduction To ScreeningWorks Pro

Introduction To ScreeningWorks Pro ID Verify

Lease Builder Workflow (Breeze)

Lease Builder Workflow (Breeze Premier)

Leasing Specials

New Property Setup Review

Prospect Lifecycle Overview (Breeze)

Prospect Lifecycle Overview (Breeze Premier)

Rentable Items

Resident Lifecycle Overview (Breeze)

Resident Lifecycle Overview (Breeze Premier)

Residential Reporting Overview (Breeze)

Residential Reporting Overview (Breeze Premier)

Residential Spotlight

Screening Setup & Overview (Breeze)

Screening Setup & Overview (Breeze Premier)

Introduction To Self Storage



SELF STORAGE

Introduction To StorageCafe

Self Storage Spotlight

Storage Delinquency & Auctions

Storage Quote To Tenant Workflow

Storage Tenant Lifecycle

Advanced Reporting Filter Overview

TECHNICAL

Dashboards, Widgets & Calendar

Independent Consultant Network

Lease Builder Setup (Breeze)

Lease Builder Setup (Breeze Premier)

Meet The Yardi Breeze App

Owner Portal App Overview

Setup Import Tool Overview

System Administration Best Practices

Toolbox Overview (Breeze)

Toolbox Overview (Breeze Premier)

Upgrading From Breeze To Breeze Premier

User Security Review (Breeze)

User Security Review (Breeze Premier)