

CLASS LIST



A USER CONFERENCE

REFRESH

APRIL 19-20, 2023



yardibreeze.com/refresh

DON'T MISS THESE CLASSES!



CLIENT PANELS

You know who has the best tips and tricks for getting the most out of your Breeze platform? Our clients! Check out our client panel sessions featuring your peers sharing their expertise on how to use technology to streamline your operations, marketing, customer retention, risk management and more.



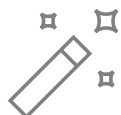
SPOTLIGHT SESSIONS

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



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.



UPGRADING FROM BREEZE TO BREEZE PREMIER

Learn about the differences between Breeze and Breeze Premier and why upgrading to Breeze Premier might take your business to the next level. This class will cover the benefits of Breeze Premier as well as touch on the upgrade process.



ACCOUNTING

Account Tree Setup

Accounts Payable & Accounts Receivable Reporting

Accounts Payable Overview (Breeze)

Accounts Payable Overview (Breeze Premier)

Accounts Receivable Overview (Breeze)

Accounts Receivable Overview (Breeze Premier)

Advanced Accounts Receivable

Bank Reconciliation Overview & Troubleshooting

Financial Reporting Overview

General Ledger Review: Monthly & Annual Procedures

Management Fee Setup

Setup & Best Practices For 1099s

AFFORDABLE HOUSING

Affordable Housing Key Features

Affordable Housing Spotlight

Affordable Unit Transfers

Best Practices For Rural Development Properties

Best Practices For Tax Credit Properties

HOME Properties Troubleshooting

HUD Repayment Agreements

Income Verification Services

Introduction To RentCafe Affordable Housing

Monthly Processing for 50059

BUDGETING

Budget Setup & Reporting

CANADA

Canada Taxation Review

Rent Control: Ontario & British Columbia

Rent Control: Manitoba



COMMERCIAL

Commercial Key Features

Commercial Recoveries

Commercial Reporting Overview

Commercial Spotlight

CommercialCafe Setup

CommercialCafe Site Manager Overview

CommercialCafe Tenant Portal Overview

Lease Clauses & Options

Retail Key Features

CONDO / HOA

Associations Key Features

Introduction To CondoCafe Owner Portals

JOB COSTING

Job Cost Overview Part 1: Setup

Job Cost Overview Part 2: Transactions
& Reports

ENERGY

Introduction To Utility Billing & Invoice
Processing

INVESTMENT MANAGEMENT

Investment Manager: Investor Reporting
& Portal

Owner Tools



MAINTENANCE

Advanced Maintenance Requests

Introduction to RentCafe Connect

Work Order & Inspections Overview

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

Introduction To RentCafe Marketing & Leasing

RentCafe & Blue Moon Leasing: New Leases

RentCafe & Blue Moon Leasing: Renewal Leases

RentCafe Leasing Workflow: New Leases

RentCafe Leasing Workflow: Renewal Leases

RentCafe Tenant Registration

RentCafe Website Design

NEW YORK

New York Property Management & Compliance



PAYABLES

Bill Pay Overview

Invoice Approval Workflow Review

Full Service Invoice Processing &
CHECKscan

PAYMENT PROCESSING

CHECKscan App Overview

Payment Processing Setup & Reporting

Online Payments Overview

REPORTING

Advanced Correspondence

Custom Tables & Ad Hoc Reporting

Correspondence Overview

Monthly Reporting Packet

RESIDENTIAL

Deposit Interest

Prospect Lifecycle Overview (Breeze)

Introduction To ResidentShield Renters
Insurance

Prospect Lifecycle Overview (Breeze
Premier)

Introduction To ScreeningWorks Pro

Rentable Items

Lease Editor Tool

Resident Lifecycle Overview (Breeze)

Lease Renewal Proposals

Resident Lifecycle Overview (Breeze
Premier)

Leasing Specials

Residential Reporting Overview

New Property Setup Review

Residential Spotlight



SELF STORAGE

Introduction To Self Storage

Introduction To StorageCafe

Self Storage Spotlight

Storage Delinquency & Auctions

Storage Quote To Tenant Workflow

TECHNICAL

Custom Table Setup

Dashboards, Widgets & Calendar

Meet The Yardi Breeze App

Independent Consultant Network

Setup Import Tool Overview

System Administration Best Practices

Toolbox Overview

User Security Review