



APRIL 23 - 24

REFRESH

VIRTUAL

CLASS LIST

Icon Legend

★ **Basic**

These classes are designed to give any user an introductory level understanding of the Breeze platform and its related products.

★★ **Intermediate**

These classes are recommended for users with intermediate-level knowledge of the Breeze platform. Many of these classes explore how to optimize the product for better efficiency and performance.

★★★ **Advanced**

Advanced classes are designed for expert users offering in-depth explorations of complex topics and cutting-edge techniques to further enhance knowledge and skills.

■ **Product Overview**

These classes are designed to give clients who aren't licensed for a product a high-level understanding of the product's key features, functionality and benefits.



YARDI **breeze**®

ACCOUNTING

- ★ **Accounts Payable Rundown (Breeze)**

In this class, you'll learn how to create payables and mark them as paid in Breeze. We'll review the process of adding vendors and payables, making payments, entering a manual check and transferring funds to vendors or owners via Yardi Bill Pay (ACH). We'll also cover how to create and post recurring payables for expenses that repeat each month. This presentation is relevant for property managers using either a residential or commercial Breeze database.
- ★ **Accounts Payable Rundown (Breeze Premier)**

In this class, you'll learn how to create payables and mark them as paid in Breeze Premier. We'll review the process of adding vendors and payables, making payments, entering a manual check and transferring funds to tenants, vendors or owners via Yardi Bill Pay (ACH). We'll also cover how to create and post recurring payables for expenses that repeat each month. This presentation is relevant for property managers using either a residential or commercial Breeze Premier database.
- ★ **Accounts Receivable Rundown (Breeze)**

This AR rundown will show you how to create charges for tenants and record their payments in Breeze. Additional topics include bank deposits, NSF's, prepayments, late fees and rent increases.
- ★ **Accounts Receivable Rundown (Breeze Premier)**

In this class, we'll walk you through tenant-level AR functions in Breeze Premier like creating charges, receiving payments, depositing receipts and creating prepayments. We will also cover batch processing actions such as batch charges, batch receipts, monthly posting, write offs, quick refunds and the lockbox.
- ★★ **Become An Expert In Management Fee Calculations (Breeze)**

Are you familiar with the management fee task in Breeze? This useful feature lets you set up your database to generate management fees. We'll walk you through each step and help you understand what the calculations mean.
- ★★ **Become An Expert In Management Fee Calculations (Breeze Premier)**

Are you familiar with the management fee task in Breeze Premier? This useful feature lets you set up your database to generate management fees. We'll walk you through each step and help you understand what the calculations mean. You'll also learn about advanced management fees which allows you to determine the management fee percentages per GL account. We will review the Calculation Management Fee function to ensure you understand the transaction-level calculations.
- ★★ **Beyond The Basics: AP & AR Reporting**

Already comfortable with the basics of AP and AR reporting? We'll go deeper into AR and AP reports to help you utilize the analytic reports and dive into the most useful reports. We will cover receivable detail by charge code, charge registers, unpaid charges, rent deferrals and more. By the end, you'll know what information is generated in these reports, how to use filters to get the most out of them and how to use the data to make decisions for your business.
- ★★ **Deep Dive Into Budget Setup & Reporting**

Did you know that Breeze and Breeze Premier can categorize your annual and monthly expenses? This is a great way to create an annual budget for each property. Learn how to utilize the budget comparison report to align the amounts budgeted for each GL account to the actual amounts.



Explore Custom & Specialized Financial Reporting Features

Let's go over the financial reports available in Breeze and Breeze Premier. We'll show you how to use intuitive default filters and property attributes to run reports to your specifications.



How To Build Invoice Approval Workflows

Did you know Breeze Premier lets you set up an invoice approval workflow? The approval process is flexible. Specify multiple steps and even route invoices to different people based on amount. This class will teach you the options you have, walk you through the simple setup and help you understand what the workflow will look like once completed.



Intro To Full-Service PayScan & CHECKscan

Transform your AR and AP processes with our Full-Service CHECKscan and PayScan solutions, allowing you to focus on higher-value tasks. Full-Service CHECKscan automatically processes tenant checks. Funds deposit directly into the bank and appear in Breeze Premier, ready to post to tenant ledgers. With Full-Service PayScan, vendors send invoices directly to Yardi, and our team enters them into Breeze Premier.



How To Make Tackling Beginning Balances A Breeze

Learn how to bring beginning balances into your Breeze or Breeze Premier platform. Whether you're onboarding your next property or are new to the platform, this class will help you understand the tools and workflows available to you.



Let's Make 1099s Easy Breezy

Not sure where to start with 1099s this year? Take the stress out of tax season by following the 1099 best practice steps laid out in this class. Find out what taxpayer information you'll need to set up owners, vendors and GL accounts. Keep things speedy by learning to double-check your setup at a glance.



Manage & Troubleshoot Bank Reconciliations Like A Pro

Bank reconciliation may seem complex, but Breeze and Breeze Premier make it intuitive and streamlined. We'll give you a brief overview that includes bank reconciliation prerequisites and a review of the bank reconciliation process. You'll walk away with a firm grasp of common troubleshooting techniques and the ability to handle issues quickly on the go.



Managing & Tracking Delinquencies

This class will teach you how to use unpaid charges and AR summary reports to identify delinquency, as well as how to troubleshoot discrepancies.



General Ledgers: Monthly & Annual Procedures

In this class, we'll cover the basic general ledger functions of Breeze and Breeze Premier (e.g., journals, closing properties, closed/open accounting months, post transfers). We'll also look at month-end and year-end procedures. This class is perfect for anyone looking to keep better track of their financial records.



Setup & Reporting For Gross Potential Rent

Breeze Premier allows you to calculate the Gross Potential Rent (GPR) for your residential properties and display your losses by category. This class will walk you through the GPR journal entry Breeze Premier will create and the financial reports that are impacted.



The Easy Way To "Grow" Account Trees For Different Audiences

In Breeze Premier, financial reports "grow" from account trees. We'll show you how easy it is to customize account trees to meet the reporting requirements of different audiences.

AFFORDABLE



A Simple Way To Streamline Monthly Processing For 50059

We know voucher and 50059 certifications can be tricky. This class looks at best practices Breeze Premier users can use to streamline voucher/50059 management. We'll also look at common errors to avoid.



Best Practices For Rural Development Properties

Get crucial guidance on the recommended process for assigning and removing rental assistance, as well as how to conduct monthly postings for rural development properties.



Getting Started With 50059 Special Claims

This session covers special claims features in Breeze Premier, including how to identify potential special claims, create and submit claims to contract administrators for approval and place approved claims on the HAP voucher for payment.



50059 Voucher Reconciliations For Beginners

This session provides guidance for correcting 50059 vouchers in Breeze Premier, avoiding common voucher errors and correcting voucher discrepancies.



How To Handle Recertification Notices & Process

Want to send recertification notices to your residents through Breeze Premier? Join us to learn more about how easy it can be.



How to Simplify Compliance with RentCafe Affordable Housing

Join us to learn more about how RentCafe Affordable Housing can help you save time on daily activities and renter services. Get ready to revolutionize the way you handle compliance interviews.



Important HOTMA Rule Changes & How Breeze Premier Has Adapted

HOTMA final rule changes went into effect January 1, 2024. However, HUD has delayed implementation for 50059 properties pending TRACS 203A specifications and the availability of site software. This class will discuss changes to Breeze Premier in support of the updated HOTMA requirements, covering all subsidy types.



Protect Against Income Fraud With Yardi Verification Services

With the industry facing an uptick in rental fraud, fraud prevention is a hot topic. This class covers what site staff can expect with Yardi's income and asset verification services including the benefits of faster qualifications and fewer days vacant.

CANADA



All About Rent Control: Ontario & British Columbia

Take advantage of Breeze Premier's built-in rent control functionality. Clients in Ontario and British Columbia can use Breeze Premier to calculate rent increases, issue rent increase notices and generate notices of eviction. This class will show you how to set up, use and troubleshoot these features.



Calculating & Reporting Canadian Taxes

Breeze Premier can automatically calculate Canadian federal, provincial and harmonized taxes as you enter transactions. This class will show you how to set up your properties, vendors and GL accounts for taxation. We'll also review the owner tax report, which will show you how much tax was received or paid at each property in a given reporting period.

COMMERCIAL



All About Commercial Lease Clauses & Options

Become familiar with the setup fundamentals required for commercial lease administration in Breeze Premier. Explore how easy it is to set up lease clauses and options, generate a lease abstract and run relevant reports.



Boost Engagement With CommercialCafe Tenant Portal

Welcome to CommercialCafe, an online tenant portal for tenants to easily review their lease terms, pay rent, submit maintenance requests and submit retail sales figures. The class also covers how to use Site Manager to add users, invite your tenants to register and troubleshoot common errors.



How To Save Hours On Commercial Recoveries

This class offers an overview of commercial tenant recovery setup, recovery reconciliation, commercial expense reporting and important troubleshooting basics that can save you time and energy down the road.



Everything Retail: Setup, Data Entry, Overages & More

Participants in this class will learn how to set up retail breakpoints on a tenant, record retail sales data and calculate and charge tenants for retail.

CONDO/HOA



Cover Your Assets: Managing HOA Violations

This class covers how to set up and use the violations feature in Breeze Premier for condo and HOA properties.



Getting Started With CondoCafe Owner Portals

This class will show you how easy it is to invite your condo or association homeowners to register for CondoCafe. We'll also give you a tour of the CondoCafe portal including how homeowners can make payments, submit maintenance requests, store important documents and more.



How To Handle Fee Increases & Special Assessments

Explore how to use the fee increase feature to calculate and post fee increases and stop recurring fees, as well as how to post special assessment charges.

ENERGY



The Hidden Benefits Of Yardi Energy Solutions

Utility expenses are the largest source of operating expenses under your control. Discover how adding Yardi Utility Billing and Yardi Utility Invoice Processing to Breeze Premier can help you reduce the administrative cost of managing your utility bills, recover revenue through submetering and tenant billing, report on utility performance through Yardi Pulse and file data with ENERGY STAR®.

GENERAL



Get Rewarded: Join The Yardi Ambassador Program

Are you happy with your Yardi software experience and interested in being recognized as an industry leader? Would you be interested in promoting your business? Do you like rewards programs? If yes, this class is for you. Join us to learn about the Yardi Ambassador Program and what it can do for your business.



JOB COST

Setting Yourself Up For Job Cost Success

Participants in this class will learn to see a project through to completion in Breeze Premier. We'll show you how to create job cost transactions, close a job and run related reports.

INVESTMENT MANAGEMENT



Yes, You Can Impress Your Investors

Learn how to give high-net-worth and institutional investors easy access to documents and portfolio positions with a branded online portal. This class will show you how Yardi Investment Manager automates and streamlines document delivery, displays portfolio positions with an easy-to-use dashboard and delivers insights into potential opportunities in the pipeline. We'll also review the setup and administration for managing investor access to the portal.



Meet RentCafe Connect, Your 24/7 Maintenance Call Center

Available for Breeze Premier clients, RentCafe Connect is a 24-hour maintenance call center that lets you provide phone support for residents who experience after-hours maintenance emergencies. This class will give you a complete overview of the service.



Handling Standard Work Orders & Inspections

This class provides an overview of standard inspections and work orders. Learn how to create basic maintenance requests, update work orders in bulk, set up and manage inspections and run related reports.



Up Your Maintenance Game With Advanced Work Orders

Learn about the more advanced maintenance request features available in Breeze Premier, including how to charge commission or administrative fees for maintenance requests.

MANUFACTURED HOUSING



Deep Dive Into Manufactured Housing Loan Tracking

Do you offer loans to your manufactured housing residents? If so, join us as we explore the benefits of loan tracking. Learn to manage all tasks related to loan receivables, including creating amortization schedules, prepayment penalties, charges and receipts. We'll also cover setup and reporting.



Set Up Intuitive Site Maps For MH Communities

Learn how to upload and configure a site map image in Breeze Premier. Once uploaded, you can link your lots to provide your team with a valuable visual aid for tracking status and availability of your MH lots and homes.



Simplify Your Violation Workflows For MH Communities

Discover how to set up MH violations and the violation workflow including how to create them, generate letters and charges and schedule inspections.



Win At Lot, Home & Resident Management In MH

This course covers lot and home types, adding homes to lots, moving homes between lots, scrapping homes and the move-in/move-out process in manufactured housing.

MARKETING & LEASING



Adding Lease Addenda In RentCafe

In this class, we'll cover the process of adding custom addenda for client-specific forms that are not part of the standard RentCafe lease document package.



Adding Lease Addenda With Blue Moon

In this class, we'll cover the process of adding custom addenda for client-specific forms that are not part of the standard Blue Moon lease package.



CRM Setup & Queue Management

Participants will gain a deeper understanding of the CRM queue in Breeze Premier including prerequisites, setup, how to add and manage activities and run activity reports. We'll show you how to set up and customize follow-up schedules, as well as how to manage prospect activity through both the queue and calendar.



Enhancing Your RentCafe Configuration

In this class, we'll cover your configuration options on the Breeze RentCafe tab. You have full control of what options and details your prospects and residents will see. This is how you set up how your property details are seen online. Everything from office hours, pet policies, property amenities and your ILS syndication is easily configured in one place.



Getting The Most Out Of Email & Texting Features

We'll go through the process of using Breeze and Breeze Premier to easily communicate with tenants, prospects, owners and vendors. You'll come away with a better sense of how to use email templates and text messaging to automate communications and gain time back in your day.



How To Customize Your RentCafe Property Website

Discover how we can help you set up and design your own unique website to attract prospects. You will also learn how to manage your photo gallery and property details. We'll also review the editing tool you'll have available if you want to make your own website adjustments.



How To Make Your RentCafe Corporate Website Speak For Your Brand

Did you know that Breeze and Breeze Premier make it easy to create your own corporate website? Using your data already stored in Breeze/Breeze Premier and RentCafe, you can easily advertise all of your residential properties on one site. If you need more advanced functionality, our RentCafe team can work with you to design a custom website. Find out which option would be best for you.



How To Register Tenants On RentCafe

Learn what your tenants need to do to register for the RentCafe resident portal. You'll also learn what your tenants need to do to easily make payments, submit maintenance requests and more.



Introduction To RentCafe Chat IQ

Attendees will learn about RentCafe Chat IQ, a chatbot that can be enabled on your RentCafe property website. Chat IQ uses sophisticated artificial intelligence and natural language processing to engage with customers on your behalf. You'll see how this incredibly useful tool integrates seamlessly with Breeze Premier and your property website.



Make The Most Of Your Online Presence

Find out how to optimize your online brand presence and bring in more leads and leases. If you are licensed for property or corporate websites, this class is for you. We will show you some of the bells and whistles including 3D floor plans, SEO tools, Google tags and more.



Optimize Your RentCafe Leasing Workflow

We'll take you through the prospect workflow in Breeze Premier so you can optimize how you manage prospects, applications, move-ins and lease generation using Yardi lease documents. Learn how you can offer your tenants lease renewal options and understand what they need to do to accept your offer and sign their renewal online.



RentCafe Leasing Workflow For NY Rent Stabilized Units

We'll take you through the prospect workflow in Breeze Premier so you can optimize how you manage prospects, applications and move-ins for your NY rent stabilized units. Learn how you can offer your NY tenants lease renewal options and understand what they need to do to accept your offer and sign their renewal online.



Unpacking The RentCafe & Blue Moon Leasing Workflow

This class covers the leasing workflow in RentCafe Site Manager, from application submission to lease execution (applies to properties generating leases with Blue Moon).

PAYMENT PROCESSING



Configuring Electronic Payments From Residents & Tenants

Learn how easy it is to set up online payments for your properties (and why you should!). There are a few key steps to setting up your Breeze or Breeze Premier environment for payment processing, but you can be up and running in no time.

★★

How To Use Yardi Bill Pay to Process Payments

This class provides an overview of Yardi Bill Pay, our AP payment settlement service available for both Breeze and Breeze Premier clients. We'll cover what Bill Pay is and its benefits, how it works and how to set up and begin processing payments.

★★★

Online Payment Reports & Troubleshooting

This course will cover how to run online payments reports to address common payment issues (e.g., suspended transactions, what to do if payments fail). You will also gain an understanding of the tenant bank account verification process.

★★

Take A Deeper Look At The CHECKscan App

In this class, you'll learn about the Breeze Premier CHECKscan app, a time-saving tool that will improve your accounts receivable process. See how your business can reduce data entry, human error and banking fees.

REPORTING

★★

Create Correspondence Letters With Ease

This class is designed to help you better understand the tenant correspondence letter function, including how to generate notice, rent increase and lease renewal letters in Breeze and Breeze Premier. We will also review how to create and generate custom correspondence letters, a feature unique to Breeze Premier.

★★

How To Create Monthly Report Packets

Learn how to create monthly report packets in Breeze and Breeze Premier. This feature allows you to consolidate all your favorite reports into a PDF to email owners or send directly to the owner portal.

★★

Interpreting The Rent Roll

We'll take a deep look at the rent roll report, so you come away with a better understanding of the data as well as common troubleshooting techniques.

★★★

Learn To Create Custom Tables & Ad Hoc Reports

Breeze Premier includes many standard reports. In this class, you'll discover how to leverage data in the system to build ad hoc reports with drill-down capabilities. In the process, you'll also learn how you create custom data fields to store additional data in the platform.

RESIDENTIAL

★

Everything DHCR: New York Property Management & Compliance

Manage DHCR rent-stabilized properties using Breeze Premier's New York add-on functionality. Topics include tracking rent-stabilized units, processing leases and renewals, maintaining records for NY health regulation compliance (including lead paint, window guards, bedbugs and stove knob cover notices) and processing annual apartment rent registration for rent-stabilized units.

★

How To Add Rentable Items & Assign Them To Tenants

We'll help you add rentable items and assign them to tenants. We'll also discuss how rentable item charges are applied to ensure tenants are billed properly.

★★

Navigating The Lease Builder Workflow

Learn how to create lease templates with the lease editor tool. We'll show you step by step what to do once your templates are created.

■ New & Improved Fraud Detection Toolkit

To reduce your fraud risk, this class will teach you everything you need to know about Yardi's screening solutions, including ScreeningWorks Pro, ID Verify, Document Authentication and Income Verification. See how they integrate directly with Breeze or Breeze Premier for a seamless experience for you and your applicants.



★★ Processing Tenant Move-Outs

In this class, we'll go over the process of moving a tenant out and refunding their security deposit. We'll also discuss relocating tenants that are not moving out of your community but may be moving to another unit or property in your portfolio.



■ Reduce Risk With ResidentShield Renters Insurance

Breeze and Breeze Premier offer a range of renters insurance options. This class will cover master policies, HO4 policies and third-party policies. You'll also get a better understanding of the insurance dashboard and its reporting features.



★ Turning Leads Into Leases (Breeze)

This class covers the prospect life cycle in Breeze: adding a new prospect, entering their personal information, triggering screening and eventually choosing to either schedule their move-in or decline them as a tenant.



★ Turning Leads Into Leases (Breeze Premier)

This class covers the prospect life cycle in Breeze Premier: adding a new prospect, entering their personal information, triggering screening, adding leasing specials and eventually choosing to either schedule their move-in or decline them as a tenant.



★★ Screening Walkthrough & Top FAQs From Our Clients

This class dives into the workflow for screening applicants and takes you through the executive screening dashboard. We'll also answer some of the most common screening questions.

SELF STORAGE



★ Everything Accounts Receivable In Self Storage

This special session on AR in self storage will cover retail sales and inventory, and how to waive fees in the system.



★★ Reservations & Payments In StorageCafe

We'll cover online reservations and payment workflows in StorageCafe, so you know exactly what your prospects see in their portals. Then we'll discuss smart, simple ways to convert customers and keep them happy.



★ Self Storage Tenant Lifecycle

Learn everything you need to know about the lifecycle of self storage tenants. This class will cover daily tasks, transfers, multi-unit accounts, charges and move-outs.



★ Setting Up Property Maps For Self Storage

Learn how to upload and configure a property map image in Breeze Premier. Once uploaded, you can link your units to provide your team with a valuable visual aid for tracking the availability of your self storage units.



★★ Storage Delinquency & Auctions

This class covers the self storage delinquency and auction processes in Breeze Premier. Learn how to set up delinquency fees/schedules and complete delinquency processing. We will also walk through the auction manager to process units that are up for auction.

TECHNICAL

★★

All About The Owner Portal & App

Learn how to use the owner portal in Breeze and Breeze Premier to communicate with your property owners and receive payments from them. We will also cover how to set up your owners on the owner portal app.

★★

Best Practices For Importing Your Data

In this class, we'll show you how to use the import data tool to properly format your data and import it into Breeze or Breeze Premier.

★★★

Best Practices For Inactivating Properties

Learn what you should do in Breeze and RentCafe when you stop managing a property. We'll go over inactivation procedures that will keep your books and records in order.

★★

Most Useful Tools In The Toolbox

In this class we'll look at the most commonly used rebuild functions in the toolbox, as well as the update transaction date tool, custom lists and excluding tenants from open AR.

★★

Navigating User Security Setup

Need tighter control over access to your data in Breeze or Breeze Premier? Join this class where we'll cover security options in Breeze versus Breeze Premier. We'll also explore security reporting options that will help you make smart decisions about your security settings.

★★

Tips & Tricks For System Administration

This class covers system administration in Breeze and Breeze Premier. We'll help you save time by automating tasks and generating reports that let you view and monitor activity within your database.

★★

Working On the Go: The Breeze Mobile App

Have you downloaded the Yardi Breeze app? Our free mobile app offers a quick and easy way to complete approvals, maintenance and inspection tasks right from your smartphone. You'll also be able to view vendor, property and tenant records as well as your Breeze calendar. Join this class to learn how to set up and use the app.