

UPGRADING TO YARDI BREEZE

Welcome to this quick guide to the upgrade process from your current Yardi program to Yardi Breeze or Yardi Breeze Premier.

Our dedicated team has helped thousands of clients make the transition, and we're looking forward to supporting you through this process and helping you achieve your goals.



THE UPGRADE PROCESS

KICKOFF

TIME: 1-2 WEEKS

Purchase Breeze or Breeze Premier: Once your agreement is finalized and paid, your company is assigned a conversion specialist.
Kickoff call: Your conversion specialist will schedule a call to discuss your goals, project schedule and determine your conversion date.

PRE-CONVERSION

TIME: 1-2 WEEKS

Pre-conversion checklist: Review and complete the pre-conversion checklist to make sure you have everything you need for a smooth transition.
Data screening: A specialist will help you back up and retrieve your data, then check it for errors that may hinder a smooth conversion.

CONVERSION

TIME: 1-2 BUSINESS DAYS

Data conversion: Expect 1-2 business days of system downtime while we convert and upload your current and historical data into the Breeze database.
Post-conversion call: We'll make sure you're logged in, help with configuration, give you a short program tour and answer any questions.

POST-CONVERSION

TIME: 4-6 WEEKS

Post-conversion checklist: Review and complete the post-conversion checklist to ensure all data has been converted accurately.
Configuration & training: Schedule calls to help with data validation and training. Phone support, live chat, training videos and webinars in the built-in Help Center are also available.

WHAT WE CONVERT

The data conversion team will bring over your full financial data for the previous two years. Financial transactions prior to the previous two years are replaced with monthly journal entries so you can run historical financial reports without the risk of data corruption.

- This process affects all transaction types (receipts, charges, checks, payables, bank deposits and journal entries).
- New beginning balances are automatically created with journal entries based on old transactions.
- Any open receipts, charges, checks or payables will come over into the current transaction tables. This means anything open that has not been finalized or reconciled will come over.

Example: If converting in March 2024, all transactions from 2024, 2023 and 2022 will be live, providing full drill down and editing capabilities. Tenant & Vendor ledgers split into live (2022-2024) and archived (2021 and prior) tables.



WE'RE ALWAYS HERE TO HELP

With phone support, unlimited live chat support and 24-hour online Help Center access, switching to Breeze or Breeze Premier can be a fast, seamless process.

If you have any questions, don't hesitate to reach out and ask!
yardibreeze.com | sales@yardi.com or (800) 866-1144

