Get the most from your technology investment by managing affordable housing properties, residents, finance and compliance with a single software platform.
Power Your Organization With a Single Connected Solution

- Consolidate operations on one platform to work smarter, maximize compliance, manage risk and gain efficiency
- Focus on what matters most with a system that provides a portfolio-wide view and a single version of the truth
- Untether your staff with mobile access to complete reporting, approvals and resident services from smartphones and tablets
- Keep your data safe and reduce costs with an award-winning cloud solutions provider
- Leverage the experience and applied knowledge of an affordable housing software industry leader

Yardi Affordable Housing Suite

<table>
<thead>
<tr>
<th>Service</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Management</td>
<td>1</td>
</tr>
<tr>
<td>Online Applications &amp; Recertifications</td>
<td>9</td>
</tr>
<tr>
<td>Resident Screening</td>
<td>13</td>
</tr>
<tr>
<td>Payment Processing</td>
<td>17</td>
</tr>
<tr>
<td>Energy</td>
<td>21</td>
</tr>
<tr>
<td>Procure to Pay</td>
<td>25</td>
</tr>
<tr>
<td>Maintenance Management</td>
<td>29</td>
</tr>
<tr>
<td>Budgeting &amp; Forecasting</td>
<td>33</td>
</tr>
<tr>
<td>Job Cost</td>
<td>37</td>
</tr>
<tr>
<td>Business Intelligence</td>
<td>41</td>
</tr>
<tr>
<td>Online Learning</td>
<td>45</td>
</tr>
</tbody>
</table>
Yardi Affordable Housing Suite

- SaaS
- Ancillary
- Procure to Pay
- Online Applications
- ERP

- Data
- Market & Research Data
- Procurement, Vendor Management, Invoice Processing, Bill Pay
- Resident Screening, Payment Processing, eLearning, Insurance, Utility Billing
- Applicant and Resident Portals
- Property Management, Accounting, Compliance, Operations, Maintenance, Business Intelligence

Yardi Affordable Housing Suite
Key Benefits

• Features a single platform and database with full drilldown for true visibility
• Utilizes automated workflows modeled on industry-standard best practices
• Includes hundreds of standard reports and custom analytics with drilldown to transaction-level data
• Offers a suite of built-in smart additions for the flexibility to create a full business solution
• Leverages Software as a Service (SaaS) deployment and benefits
• Delivers real-time access through all major web browsers to execute leasing and provide resident services from smartphones and tablets
Property Management

Leverage the most advanced SaaS property management platform for affordable housing with built-in accounting, compliance, real-time performance analytics and complete mobility.
Yardi Voyager Affordable Housing

Yardi Voyager is an end-to-end platform combining compliance, financial and property management information in a single, centralized database — with mobile access to online applications, provide resident services, view dashboards and complete tasks from smartphones and tablets. Add products from the Yardi Affordable Housing Suite and take advantage of our comprehensive front office and back office tools and services for a full business affordable housing real estate solution. Streamline workflows and boost compliance with support for all major subsidies, including HUD 50058, 50059, LIHTC, RD, HOME and more.

Efficient Management

Streamlined workflows help manage check writing, approve work orders, process purchase orders, and set up new leases, move-ins, move-outs, and more. Voyager performance tables allow you to configure stored procedures to meet your individual property management requirements.

Smart Software

Voyager has smart navigation tools including a menu search box to find functions and a site search box to find account information quickly and easily. Make a favorites list of the screens you use most or use the history function to see where you’ve been. If you’re a keyboard power user, you can set up shortcuts to your favorite screens. With Voyager, you can work on a desktop computer, laptop computer, Microsoft® Surface™ Apple® iPad®, Android™ tablet and all major smartphones. And because it’s browser independent, you can choose the browser that works for you.
Mobile Solutions

Provide resident services, and complete tasks and approvals right from your mobile device. License our suite of products for access to mobile apps including RENTCafé Affordable Housing, Yardi PayScan Mobile, Yardi Maintenance Mobile, Yardi Maintenance Manager Mobile, Yardi Inspection Mobile and more. Yardi mobile solutions are optimized for iPhone® and iPad®, BlackBerry® smartphones and Android™ smartphones and tablets.

Extend the Voyager property management and accounting platform with integrated value-add products from the Yardi Affordable Housing Suite. The suite features comprehensive solutions for online applications, screening, procurement, invoicing, payment processing, maintenance management, energy management and more.

Key Features

- Compatible with all web browsers and mobile devices
- Streamlined leasing workflow
- Configurable role-based dashboards
- Easy to understand resident ledgers and HAP ledgers with drilldown to every transaction
- Integrated general ledger and automated move-in, move-out accounting
- Integrated maintenance and work order tracking
- Customizable notices and verification letters
- Analytic reporting with drilldown and custom report writing
- Smart data entry and quick access to regularly visited screens and history
- Correspondence management for resident communications
- Service contract feature lets you process purchase orders, change orders and payables for contracts
- Hosting options include Yardi SaaS and Yardi SaaS Select

Schedule and complete inspections from a smartphone or tablet. Assigned inspections appear instantly on the inspector’s device.
Program Compliance

Provide staff with compliance workflows created by a dedicated team of Yardi affordable housing experts. Voyager provides intuitive browser-based navigation through everyday workflows for compliance with all major federal and state funding sources. Voyager can also be configured to track compliance data for many local housing policies and programs. Reduce training costs and prevent user mistakes with industry-leading software designed for affordable housing staff. Submit accurate reports on time with connectivity to your funders’ reporting sites.

Manage HOME Units

- Qualification of HOME households with one or multiple subsidies
- Household qualifying based on total or adjusted income as required
- Fixed and floating HOME units
- Rent limit history
- Automatic enforcement of HOME available unit rule
- State-specific tenant income certifications
- HOME unit mapping
- Automatic maximum rent override when combined with project-based subsidies

Support Rural Development Properties

- Automated RD 3560-8 Tenant Certification Form and RD 3560-29 Notice of Payment Due Report
- Compatible with USDA chart of accounts
- Basic rent and overage tracking
- MINC interface
- General-ledger driven 3560-7 budget worksheet
- General-ledger driven 3560-10 balance sheet worksheet
- Easy rental assistance assignment

The Affordable NAUR Toolbox gives users a quick overview of their tax credit property’s compliance.
Support HUD 50059 Units

- Multiple subsidy types and contracts per property
- Gross rent change and automatic updates to later certifications
- Automated utility reimbursement payments
- Centralized TRACS processing of tenant and voucher files
- Automated iMAX interface
- One-step receipt processing of HAP voucher payments
- Printing of required compliance documents including 50059s, vouchers, model leases, 9887s and more
- Customizable reports, forms, letters and leases
- Flexible waiting lists
- Complete certification history
- Rent, HAP and utility reimbursements
- Debit card option for utility reimbursement payments

Manage Tax Credit Properties

- Separate income and rent restrictions
- Automatic enforcement of the Available Unit Rule and Unit Vacancy Rule
- Set-aside layering at project and building levels
- Project mapping for fixed or floating set-asides
- Flexible recertification scheduling for tenant income certifications
- State-specific tenant income certifications
- State-specific unit event reporting
- One-step receipt processing of tenant-based voucher payments
- Complete certification history
- Automatic upload of tax credit data to state sites where applicable
- Tax credit recertification waivers
- Tax credit compliance monitor helps you predict impact of changes before they happen

Key Features

- Single data entry and concurrent qualification reviews for multiple subsidies
- Online integration with reporting sites, including iMAX, TRACS and MINC
- Quick pre-qualifying and simple step-by-step qualifying
- 50059 baseline conversion tool
- Wizard workflow for pre-certification of applicants based on project type
- Customizable verification letters, recertification letters and other notices
- Dashboard summary of compliance tasks and alerts for tasks due

Voyager provides links to HUD Handbook 4350.3 and the MAT users guide within the user workflow, allowing users to verify HUD rules and regulations.
Financial Management

Yardi Voyager Affordable Housing is a complete accounting system designed to meet all applicable GAAP and IFRS requirements. The full-featured general ledger makes financial management processes efficient and responsive to unique organizational policies and procedures. With tools including multiple sets of books, general ledger allocation, recurring journal entries, segmented accounting, intercompany accounting, financial entity setup and account trees, Voyager has the accounting power to support your business.

Accounts Receivable

Voyager provides comprehensive accounts receivable functionality including resident invoicing, automatic or manual payment receipting, creation of letters and statements and back rent calculation based on different calculation types. Accounts receivable functionality is fully integrated with the general ledger, cash receipting and accounts payable in Voyager for real-time data entry with batch and quick receipts, unlimited recurring charges and late fee management with grace periods. Furthermore, Voyager manages complex rent rolls, including overages and turnover rents, and tracks multiple checking accounts.

Accounts Payable

Voyager streamlines the payables process and reduces costs by converting paper invoices into efficient electronic transactions virtually eliminating paper and mailing costs. Automated workflows create additional efficiencies as invoices are routed through the approval process through vendor payment. Voyager can generate both one-time and recurring invoices. The system can produce customizable rent statements and reconciliation letters to residents as well as generate statements in bulk for printing or sending automatically by email.

The Invoice Register Dashboard shows the status of all invoices, eliminates paper processing requirements and helps avoid bottlenecks with vendors. Data presented on the dashboard includes drilldown to vendors and payment status.
General Ledger

The powerful general ledger allows your organization to use a single chart of accounts with configurable accounting segments. The system offers standard cash and accrual books with the ability to create multiple configurable books. Users can drill down to base transactions from high-level reports.

- Distribute expenses from a source property/entity to multiple target properties/entities based on predefined allocation percentages
- Create consolidated journal entries and apply them automatically to multiple individual entities based on percentages or statistical data

Key Features

- Unlimited number of financial entities with varying fiscal years
- Recurring journal entries with formula-based calculations
- Analytic/audit dashboards for reviewing receivable, payable and job cost transactional data
- Simultaneous cash and accrual basis accounting
- Streamlined payables process that converts paper invoices into electronic transactions
- Comprehensive budgeting tools
- Automated bank reconciliation
- Automated utility allowance reimbursement payments
- Check writing capability with your paper stock

Role-based dashboards display tasks that need to be completed on a daily basis. Dashboard reporting gives a complete record of financial transactions with drilldown capabilities.
Key Benefits

- Streamlines the applicant and resident experience
- Reduces staff interview and data entry time
- Standardizes interviews to help mitigate fair housing issues
- Increases document accuracy and completeness
- Reduces paper handling and storage costs
- Increases time for site managers to assist residents and applicants
- Features full integration with Yardi Voyager and Yardi ancillary products and services
Online Applications & Recertifications

Give affordable housing applicants online access to submit everything needed to qualify for a unit. RENTCafé Affordable Housing supports HUD 50058, 50059, HOME, Rural Development Section 515 and LIHTC subsidies.
RENTCafé Affordable Housing

Simplify and expedite eligibility reviews by replacing paper applications with RENTCafé Affordable Housing. Provide convenient access to web-based rent payments, maintenance requests, community newsletters and annual recertifications.

Online Applications
Avoid the burden of handwritten paperwork and spend less time following up on incomplete submissions. With easy-to-navigate web forms, applicants can submit information when its most convenient using their mobile device or a kiosk in your office.

Paperless Documentation
Help applicants avoid unnecessary trips to your office. Prospects can easily upload all required application documents securely to RENTCafé Affordable Housing. Electronic applications reduce the cost and potential insecurity of storing physical files.

Faster Recertifications
Save staff hours by reducing the need to meet with residents each year to process recertifications. Instead of in-person meetings with your staff, residents can conveniently submit their annual updates online.

Increased Efficiency
Save time on data entry. Integration between RENTCafé Affordable Housing and Yardi Voyager Affordable Housing eliminates the need to rekey household information once an applicant becomes a resident as data flows seamlessly to Voyager.
Online payments and maintenance requests bring modern conveniences to your residents.

**Built-in Convenience**

Transform the way you work with clients with innovative features that simplify affordable housing processes, such as:

- Built-in translation features to accommodate clients with limited English proficiency
- 24/7 access for residents to update household information, request repairs, view account information, make payments and complete annual recertifications
- Automated processing of correspondence using printed barcodes for quick resident lookup without manual search effort

**Key Features**

- Streamlined application workflows designed around your business processes, rules and documents
- Compliance and lease document generation for original or electronic signature
- Multiple language options for applicants with translation and printing of documents in English
- Improved application data quality with a step-by-step workflow
- Reduced perception of staff coaching mitigating risk of fair housing claims
Key Benefits

• Reduces loss from collections, evictions and legal action
• Automates consistent decisions and improves compliance with customizable rules
• Increases ease of use with one integrated system and simplified online leasing workflow
• Leverages resident history data in Voyager for better business insight
Resident Screening

Make screening a seamless part of your Yardi Voyager Affordable Housing intake workflow and ensure staff consistently selects residents meeting all program requirements.
ScreeningWorks Pro

ScreeningWorks Pro* is a proven online resident screening system that delivers comprehensive reports so property managers can make smart rental decisions and minimize risk. You get credit reports from the three major bureaus, plus terrorist, drug trafficker, sex offender and Social Security fraud screening, rental payment history records and eviction and landlord/tenant civil court records. Using the most reliable data available, our solution eliminates guesswork and provides automated recommendations tailored for your properties to help you select qualified residents. The system is customizable for many affordable housing subsidy programs.

Confident Screening

Our solution delivers a reliable screening process to provide your rental staff with clear, consistent direction that supports your business rules. Screening workflow automation provides built-in control and cost savings and enables your staff to work more efficiently. Decision criteria are tailored for each property in your portfolio, so applicants will always be screened uniformly and according to your objectives.

Experian RentBureau Advantage

Gain a competitive advantage by adding Experian® RentBureau® data to your screening program. Experian RentBureau is the largest and most widely used database of rental payment information and currently includes data on more than 18 million residents nationwide. With ScreeningWorks Pro, you can leverage this data to factor applicants’ rental payment history as part of your resident screening decision, which will allow you to accept better quality residents who have a history of paying rent on time.

*Yardi Resident Screening in Canada
Strategic Advantage

Minimize risk and maximize revenue while maintaining compliant, safe and profitable communities. ScreeningWorks Pro provides a strategic advantage with management reports and analytics that shed light on your applicant traffic and performance. Experienced consultants are available to further assist in fine-tuning decision criteria to meet your goals.

Key Features

- Integrated with the entire Voyager leasing cycle, including generation of lease documents
- Screening and operational data are combined for smarter business decisions
- Customizable rules automate consistent rental decisions and improve compliance
- Strategic analytics and executive reports provide insight into portfolio-wide traffic and screening activity
- Integration with Experian RentBureau incorporates rental payment history
- Business profile reports available as an additional service
- Access to international credit reports for screening applicants who recently moved to the U.S.

Automate recommendations based on your criteria and help staff work more efficiently.

Oversee applicant traffic and property performance in a single snapshot with the ScreeningWorks Exec reporting dashboard.

Access the ScreeningWorks Exec dashboard and applicant reports on your smartphone.
Key Benefits

- Increases resident satisfaction and maximizes your cash flow
- Saves time by scanning and digitizing paper checks and money orders in bulk
- Offers one-stop convenience and reduces money order issues with walk-in payments
- Provides secure instant access, confirmations via text message
- Streamlines accounts payable with automated vendor and owner payments
- Auto-transfers electronic deposits and payments to and from your bank account
- Eliminates manual errors and time-consuming bank trips
Payment Processing

Save time and maximize cash flow with a payment processing solution that eliminates bank runs, automates rent collection and simplifies vendor payments.
Yardi Payment Processing

Increase resident satisfaction and office efficiency with Yardi Payment Processing. Manage accounts receivable and accounts payable with one system that helps you streamline rent collection, cut operational costs and reduce processing errors. Make collecting rent and other fees easier with user-friendly payment options that eliminate bank runs for your staff. Your residents can conveniently pay rent by check, online, via text or at participating retailers. Your staff can more quickly process incoming payments and outgoing payments to vendors and owners.

Collect Online Payments

Offer paperless self-service rent payments with a recurring payment option using Yardi Online Payments. Residents can log in at any time, view their account balances and pay rent directly from a bank account (ACH payment) or with a credit or debit card. Online payments are entered directly into Yardi Voyager, with automatic deposits and easy bank reconciliation. ACH payments are sent to your bank via EFT the next day. Credit and debit card payments are processed within 2-4 days.

Collect Text Payments

Give residents 24/7 convenient and secure mobile access to review balances and make payments via SMS text messaging with RENTCafé TextPay. Immediate confirmation is provided to residents making text payments from a bank account or credit or debit card. Rent payments are automatically entered into Voyager, improving operational efficiencies while increasing resident satisfaction by providing an in-demand mobile service.

Collect Check Payments

Eliminate trips to the bank, lost checks and manual keying errors while reducing NSF risk with Yardi CHECKscan. Scan bulk batches of personal, corporate, bill pay and cashier’s checks as well as money orders to greatly reduce processing time. Instantly create receipt batches in Voyager for all items and permanently store the image files. Payments are transferred electronically to your financial institution the next day, optimizing your cash flow.
Collect Walk-in Payments*

Let residents pay rent in cash at over 20,000 participating retail locations. Our walk-in payment system (WIPS) provides the ease of a one-stop experience and reduces money order issues for your staff. This service can be easily added to your existing Yardi cash management system. Electronic payment confirmations are automatically available in Voyager the next day. Funds are made available within three business days.

Pay Vendors & Owners*

Speed up the vendor and owner payment process with Yardi Bill Pay. Invoices are seamlessly routed through your approval workflows. Bill Pay automatically pulls payments from your Voyager database and fulfills them based on how you pay each individual. Vendors and owners receive payment via your choice of mailed check, ACH or credit card.

*Not currently available in Canada

Key Features

- Electronic deposits for rapid availability of funds
- 24/7 resident access to make online and text payments
- Credit and debit card and ACH resident payments with recurring ACH option
- Walk-in payment service for cash payments at participating retail locations
- Voyager auto-matches charges and applies payment priority rules
- Permanent check image storage for scanned payments
- Automated check writing and electronic vendor and owner payments for outgoing accounts payable
- Full-service check writing and distribution by our check writing service organization
- All transactions instantly recorded in Voyager

*Not currently available in Canada
Key Benefits

• Offers convergent utility billing that can increase collections by 20%

• Provides full transparency and visibility for more proactive management of your utility costs and assets

• Reduces time spent on annual utility budgets

• Identifies errors and costly leaks that need repair and provides easy creation of work orders in Voyager

• Saves you time and money with paperless utility invoice processing

• Gives stakeholders holistic and granular views into utility data in one single platform
Energy

Eliminate manual utility processes and increase cost recovery with an energy management suite built into Yardi Voyager. Maximize efficiency and leverage proactive analytics to better control your expenses.
Yardi Energy Suite

Choose a single solution for energy management built into Yardi Voyager for streamlined processes, better decision-making and reduced operating expenses — without data transfer or integration issues. Consolidate utility data for visibility and reporting with your existing Voyager workflows while giving residents access to one portal. The Yardi Energy Suite includes solutions for submetering and billing, utility payable processing and data capture, and analytics for sustainability and benchmarking.

Utility Billing

Use Yardi Utility Billing to maximize utility cost recovery in Yardi Voyager without interfaces, transfer or manual data entry. Leverage accurate allocations and 24/7 live resident support to increase operational efficiency while maximizing cash flow. Find the right solution for your buildings among multiple submetering and billing options with support from our regulatory staff.

Submeter Management

Reduce costs and promote conservation by charging residents for their exact and accurate consumption with submeters, meter reading and exception alerts visible in Voyager. We provide professional turnkey installation and project management for new construction and retrofit installations and ongoing system maintenance by our in-house network of experienced technicians.

Resident Experience

Give residents single online access to consumption data, statements, maintenance and payment options with convergent billing through RENTCafé. By aligning utility billing with resident activity workflows in Voyager, you can automatically recover final bills when residents move out and monitor vacant unit costs when residents move in.

Utility Expense Management

- Simplify accounts payable and budgeting with utility invoice processing, validation, data capture and more
- Save money on late fees with invoice tracking and faster processing
- Follow existing workflows and get access to data in Voyager

Pulse Dashboards

- One platform for all energy data using existing property lists and attributes
- Data is normalized for comprehensive reporting for all stakeholders
- Access data for ENERGY STAR® benchmarking, GHG emissions and more

Utility Bill Payments

- Yardi Bill Pay offers outsourced check printing and ACH payments
- Yardi Bill Pay credit card payments (both physical and virtual) create a frictionless payment process
- Complete the automation of the invoice processing cycle
Utility Expense Management

Reduce costs and automate payables with electronic invoice processing, billing validations, vacant use analysis, utility consumption and cost analytics, and optional utility bill payment. Yardi Utility Expense Management includes streamlined invoice tracking, collection and processing that greatly reduces late fees and shut-off notices. Collect and access valuable utility data with payable workflows, GL coding and bill image storage in Voyager. Get reliable, high-quality utility data audited for exceptions and proactive resolution to potential issues that saves you money and helps you make business decisions.

Bill Payments*

Speed up the utility payment process with Yardi Bill Pay. Invoices are seamlessly routed through your existing approval workflows. Bill Pay automatically pulls payments from your Voyager database and utilities receive payment via your choice of mailed check, ACH or credit card.

Utility Benchmarking & Analytics

Access utility data from invoices and resident billing in a single dashboard for analytics reporting and actionable intelligence for improved decision-making. Easily view trends and changes, create work orders from exceptions, quickly benchmark your portfolio using normalized comparisons down to the meter level, leverage budgeting features to give stakeholders visibility into asset value, and consolidate expenses, exceptions and cost recovery into one reporting platform.

Leverage our expertise and add-on services to help you meet your sustainability goals, GHG emissions and ESG reporting needs. Our team of Certified Energy Managers®, engineers and MBAs have broad experience and knowledge to identify conservation opportunities that meet your business initiatives. Add our benchmarking services to offload time-intensive ENERGY STAR reporting, compliance and certifications. Save even more money with detailed utility rate and tariff auditing and resolution support.

*Not currently available in Canada
Key Benefits

- Saves money by consolidating procurement spend into one platform
- Enables better decision-making with real-time Voyager data
- Provides powerful analytics to support continuous process improvement
- Increases efficiency and productivity with online and mobile workflows
- Eliminates interfacing with third-party systems
- Saves time and drastically reduces scanning, keying, printing and other manual tasks
- Gives vendors real-time transparency into their business with you
- Identifies potential at-risk vendors and develops strategies for managing them
Go paperless and reduce manual tasks with an end-to-end procure to pay solution. Gain real-time visibility into budgets and cash, increase efficiency with online catalogs and manage and pay vendors more effectively.
Yardi Procure to Pay

Gain efficiency and productivity across the procure to pay process while attaining real-time transparency into your budgets and cash flow. The end-to-end Yardi Procure to Pay platform includes powerful vendor management tools, flexible purchasing catalogs, electronic processing and approvals for purchase orders and invoices, and seamless outsourced vendor payments.

Paperless Invoice Processing

Yardi PayScan is a paperless, mobile-enabled invoice workflow platform that provides a 360-degree view of transactions from check to payable to invoice to purchase order, work order, job or contract. In addition, all budget and cash data is available in real-time. Use powerful analytics to drive continuous improvement across your procure to pay process.

Full-Service or Email Invoice Processing

Reduce costs and increase efficiency even further with Yardi PayScan Full Service or Yardi PayScan Email Processing. With Full Service, Yardi provides a dedicated PO Box and email address for vendors to submit invoices. With Email Processing, vendors email the invoice directly to Yardi and we enter the data into Voyager for you. All invoices show in Voyager as invoice registers, ready for you to review, approve and process as payables.
Online Procurement*

Yardi Marketplace is an online and mobile MRO shopping platform. Manage suppliers and leverage contracted pricing in one platform with off-the-shelf supplier relationships and catalogs or create your own online catalogs. Yardi Marketplace works seamlessly with PayScan to process invoices electronically. Get insightful reporting that gives you full control of your organization’s procurement activity.

Vendor Management

Empower your vendors to manage their business with you through the VendorCafe online and mobile portal. Vendors can submit invoices and view invoice status, payment details, purchase orders and work orders in real time. Invoices submitted electronically through VendorCafe import immediately into PayScan. VendorShield simplifies management of Form W-9s, certificates of insurance, service contracts and other documents.

Simplified Bill Payments*

Speed up the vendor payment process with Yardi Bill Pay. Invoices are seamlessly routed through your approval workflows. Bill Pay automatically pulls payments from your Voyager database and fulfills them based on how you pay each vendor. Vendors receive payment via your choice of mailed check, ACH or credit card.

Key Features

- Centralized and powerful procurement platform
- Full audit trail capabilities to enforce compliance
- Open invoice monitoring and real-time view of cash
- SKU-level reporting to identify potential savings
- Electronic invoicing with Yardi Marketplace and VendorCafe
- Full-service invoice importing and data entry to eliminate self-scanning
- Invoice matching to POs, contracts, WOs and jobs
- Simple management of W-9, COI, service contracts and other documents
- Integrated mobile app for online invoice approvals and review

*Not currently available in Canada
Key Benefits

- Ensures fewer equipment breakdowns with preventative maintenance scheduling
- Enables fast response to maintenance requests with mobile access
- Facilitates oversight of maintenance personnel with location tracker
- Features graphical display of key performance indicators
- Includes maintenance, inspection and fixed assets modules
Maintenance Management

Schedule, track and manage all preventative, routine and emergency maintenance from your desktop or mobile device – and gain modules for managing inspections and fixed assets at no extra cost.
Yardi Advanced Maintenance

Yardi Advanced Maintenance is your solution for complete scheduling, tracking and management of asset maintenance from your desktop or mobile device. The solution supports all types of real estate market segments including, but not limited to, multifamily, subsidized, senior, military, condominium, HOA, retail, office and industrial properties. You can schedule preventative, routine and emergency maintenance tasks. A location tracking feature allows you to match technicians with tasks, ensuring rapid response to emergency requests.

Maintenance Manager Mobile

Yardi Advanced Maintenance includes the Yardi Maintenance Manager Mobile app which helps you save time, boost efficiency and increase tenant and resident satisfaction by taking your maintenance workflow mobile. Maintenance managers can easily track technicians, assign work orders and manage their maintenance tasks from an Android™ Tablet or iPad®.

Facilities Management

Stay informed about your properties’ maintenance operations via intuitive, customizable dashboards. A guided workflow simplifies and expedites the work order creation process. Key performance indicators help you assess work order response and completion, employee activity and material usage. Also, the solution integrates with VendorCafe to allow you to request and manage vendor proposals from your tablet.
With Advanced Maintenance, you receive additional products for managing assets at no extra cost, including:

**Yardi Maintenance**
Perform and track daily maintenance for your properties with unparalleled ease and efficiency.

**Yardi Fixed Assets**
Record and monitor fixed assets from purchase order issuance through purchase, use and final disposition.

**Yardi Inspection**
Schedule, perform and manage all types of inspections including annual, regulatory, due diligence and more.

---

**Key Features**

- Full planning and scheduling of maintenance tasks
- Complete history of work orders
- Fewer equipment breakdowns with preventative maintenance scheduling
- Complete history of all fixed assets
- Fast response to maintenance requests with mobile access
- Oversight of maintenance personnel with location tracker
- Graphical display of key performance indicators
Key Benefits

- Delivers accurate revenue projections based on defined leases and rollover assumptions
- Provides greater flexibility and insight with unlimited budget revisions and ability to copy and combine budgets
- Improves collaboration during budget management processes
- Ensures tighter security with integrated access control settings
Budgeting & Forecasting

Plan for every financial scenario with flexible forecasting and real-time market conditions.
Yardi Budgeting & Forecasting

Yardi Budgeting & Forecasting makes portfolio budget projections more accurate and efficient with detailed analyses and comparisons of current and future income and expenses. Gain unmatched flexibility in budget preparation scenarios and streamline your financial planning processes.
Configurable Projections

Integrated with Yardi Voyager, Yardi Budgeting & Forecasting makes it easy to project financial scenarios using actual general ledger accounts and budgets. Forecasts can be based on market condition assumptions and be configured with data variables from Yardi Voyager.

Key Features

- Unlimited budget revisions with ability to copy and combine budgets
- Security settings to assign users with access, read and write capabilities
- Exports budget data to Microsoft® Excel
- Documents comments, variances and action items using budget details and narratives
- Uses variance analysis to identify amounts that exceed specified budgeting thresholds
- Enables zero- and task-based budgeting
- Generates a wide variety of budget-to-actual comparative reports
- Controls general ledger account access to budget worksheets
- Ability to lock worksheets and hide accounts from unauthorized users
Key Benefits

- Provides financial oversight with real-time cost, commitment and budget comparisons portfolio-wide
- Helps maintain tight cost control with automatic over-budget monitoring of every transaction
- Establishes governance with predefined workflows and rules consistent with Yardi Voyager
- Controls capital expenditure budget allocation process
- Includes extensive analytic reporting
Job Cost

Improve cost control, budget oversight and profitability for construction projects of every size and description — from capital expenditures and single-unit improvements to ground-up developments.
Yardi Job Cost

Keep projects on track with heightened cost control, complete budget oversight and accurate forecasting and management of contracts, commitments and cash flow. Manage all types of construction projects including CAPEX, tenant improvements, space renovations and property development.

Construction & Development

Support projects at all phases, from pre-development to close-out, and for any duration. You can also develop financing plans and manage contract commitments, draws and progress billings from general contractors and subcontractors, and complete projected final and cash flow forecasting.

Job Costing & Budgeting

Track actual costs automatically and compare them to the job budget. You get full visibility into all committed costs and change orders, with real-time job cost and general ledger updates as transactions are entered. Billing and draws can be created easily by actual costs incurred or percent complete, and charges automatically generated for recovering costs.

Comprehensive Reporting

Strengthen your reporting with comprehensive information related to budget amounts, revisions, commitments, change orders and amounts billed to date per category. Slice the data any way you like — by property, job, cost code or job attribute, among many other options.
Increased Flexibility

Apply user-defined workflow approvals for jobs, budgets, contracts and budget transactions. Simplify your work by hiding unused features and fields. Define your own fields for capturing pertinent data for historical purposes and reporting.

Key Features

- Unlimited, user-defined budget cost categories with templates and models
- Full contract and change order, committed cost tracking and analysis
- Detailed, real-time recording of job costs and other actions across the entire construction lifecycle
- Multiple job cost summary and detail reports with drilldown to underlying transactions
- Custom, automated workflow approval for jobs, job budgets and revisions, contracts and change orders
- Multiple points of access for importing and exporting data
- Custom job cost analytics for creating your own reports
- Seamless integration with Voyager
Key Benefits

- Leverages your operational, financial and ancillary data in Voyager for business-wide insight
- Helps you easily monitor operations using internal key performance indicators
- Delivers greater transparency into performance at portfolio, property and resident levels
- Provides 24/7 access to key decision-making tools from any mobile device
Business Intelligence

Easily create simple-to-use dashboards to analyze the operational and financial health of your entire portfolio.
Yardi Orion Business Intelligence

Yardi Orion Business Intelligence is a unique, mobile-enabled platform that can be installed and customized easily and cost-effectively. Orion features more than 200 built-in key performance indicators and powerful, flexible reports and dashboards that provide a 360-degree view of your business. Orion ensures secure access to data that helps owners and managers improve business performance yet requires dramatically less time and cost to implement than legacy business intelligence systems.

Powerful Analytics

Orion combines the financial, operational and ancillary data housed in your Yardi Voyager system and Yardi Affordable Housing Suite products to give you a holistic view of your operations — including financials, spending, energy management, applicant screening and more. Easy-to-build dashboards utilizing drag and drop functionality support action-based monitoring of trends in resident, property, portfolio and business-wide performance. You can perform ad hoc analysis, dissect data and create charts with a Microsoft® Excel connection to a tabular data model built on Voyager data. Upload and publish your Excel reports and charts for others to view in Orion. With Orion you get total visibility with detailed and configurable reporting and analytics — information that can be combined for unique insights and acted on to improve portfolio performance.

Mobile Platform

Orion is a browser-agnostic, mobile-friendly platform that delivers robust reporting and dashboards to tablets. With 24/7 convenience, you can create customized views of property and resident data through an intuitive tablet touch interface with the same customized reporting that you can generate on your desktop computer.

Custom KPIs

Orion includes a toolset that builds reporting content focused on the metrics you use to run your business. You can easily create your own unique set of key performance indicators based on data from tables in Voyager. You can also group and display data by attribute such as property type, region, portfolio and market. You control the data to display and how to display it: line charts, bar charts, pie charts, stacked bar charts, data grids with rankings and more. Once you create your unique measure and chart, it is easy to drag and drop it onto your dashboard.

Dashboards with operational data, all at your fingertips. Discussions feature allows users to add comments, tag objects and follow discussion threads and trends directly in the program.
View supply with weekly demand and leasing, first show count and application count and average rents. Filter by region, property or time period. Drill down into your revenue growth, leasing analysis and rent and occupancy analysis.

View your weekly leasing and resident activity, screening decision reporting, delinquencies, write-offs and skips, evictions and early terminations. Filter by region, property, or time period. Drill down into application demographics and resident risk by source.

Key Features

- Configurable, interactive dashboards with drag-and-drop tiles and widgets
- Discussions enable users to comment about performance metrics within dashboards
- User-defined KPI targets and benchmark thresholds
- Custom SSRS reporting with Voyager analytics and ad-hoc Excel analysis
- Performance metrics with instant slicing, dicing and pivoting data
- Mobile accessibility across multiple devices and browsers
- Ensures secure access to data that helps owners and managers improve business performance
Key Benefits

- Speeds up employee onboarding with courses that blend Yardi software training and custom policies and procedures
- Reduces training administrative costs with efficient automated workflows and data import/export
- Consolidates training program administrative tasks to a single platform
- Automates recertification processes, due dates, notifications and compliance reporting
- Improves employee performance by encouraging staff to explore new skills in safe practice areas
- Builds a robust culture of learning with achievements, peer discussions and assignment feedback tools
- Achieves better accountability and knowledge retention over traditional training
- Boosts employee confidence with relevant and effective training resources that improve job efficiency
Online Learning

Create a personalized learning experience that maximizes knowledge retention and job satisfaction.
Yardi eLearning

Get more value from your training budget. Yardi eLearning eclipses traditional staff training programs with on-demand digital content designed to improve job performance, reduce staff turnover and eliminate outdated teaching methods.

Get Simplified Access

Provide your employees with a role-specific learning plan that includes self-paced courses, instructor-led events and tests. Set delays on the learning steps to automatically unlock new content as the previous content is completed or use timed delays to trickle content out over time. Learners can self-enroll in training from their custom course and event catalogs that present appropriate content based on job role or group assignment.

Automate User Management

Save time and avoid input errors with automated data transfers. Yardi eLearning supports data transfer to and from third-party learning management, talent management and HR systems. Administrators can set up automated, regularly-scheduled data transfers that streamline employee onboarding, reduce training administrative costs and ensure accurate reporting by consolidating students’ comprehensive training activities.

Customize Your Catalog

Choose from a comprehensive catalog of over 750 courses covering compliance, safety, professional development and more. Each course is fully customizable to individual company needs. Approximately 80% of the courses cover Yardi products and services. These Yardi-specific courses fit the learning needs of beginners to advanced learners.

Increase Staff Compliance

Keep staff informed about the latest federal legislation and prepared to comply with changing regulations. Yardi eLearning maintains courses that not only explain the laws but provide relevant examples to help your team members understand areas of risk they must be aware of based on their role in the organization. Current offerings include Federal Fair Housing education (general and maintenance technician-specific) and harassment training (employee and supervisor versions). Flexible bilingual Spanish versions allow your team members to select their own language preference while you issue and monitor completion on a single course.

Craft Learning Plans Based on Role

Build comprehensive training programs, targeted by job role, that deliver learning challenges to your employees steadily over time. Yardi eLearning Learning Plans are a quick, strategic way to assign users the exact learning materials necessary for their job, next promotion or to gain additional knowledge or skills. Plans can incorporate courses, online events and other learning opportunities scheduled to drop strategically as employees progress.

Make Live Events More Effective

Gain centralized management tools for classroom, webinar and in-person events. Trainers can schedule single or recurring events, interface

Role-specific course suggestions make it simple for learners to sign up for appropriate classes.
Key Features

- Centralized solution for online courses, live training events and organizational resources
- Integration with a variety of identity providers and webinar, video hosting and help desk software providers
- Manual and scheduled reporting to track learner progress and organizational trends
- Role- or region-based course deployment
- Extensive curriculum developed and maintained by Yardi and industry experts
- Intuitive authoring tools for quick course creation and rollout to learners
- Support for multimedia formats including SCORM, HTML, documents, images and videos
- Mobile access through all major handheld devices and web browsers
- Training and consultation from experienced Yardi eLearning experts
- Easy-access search function for staff to find company-wide resources

Organize Employee Resources

Make it easy for Yardi eLearning users to find exactly what they need to make training more successful and their everyday work more efficient. Yardi eLearning administrators can use resource containers to curate relevant content from many different sources and deliver it to specific groups of users.

Sign Documents Digitally

eSign is a time-saving and paperless feature built into your Yardi eLearning university that allows you to upload your organization’s PDFs and build a digital library of documents that can be signed electronically to acknowledge policy statements or certify completion of goals and tasks. With eSign, users can insert custom signature files, select from included templates or create one from scratch on a tablet. eSign also has text fields which enable users to insert comments into the form. Eliminate the need to download, print, sign, scan, upload or email forms. Get it all done online quickly with a convenient, digital audit trail.

Collect Employee Input

Create custom surveys and assess response data without leaving Yardi eLearning. Gain faster access to survey responses and analyze data easier by avoiding import/export from third-party survey software. Collect company-wide feedback by sending surveys via platform email or in a resource container. Gain learner input by including surveys in your courses and event descriptions to measure the effectiveness of the learning materials, gauge attendee learning goals and experience, and follow live events to evaluate instructor performance and classroom feedback.

Use SCORM Courses in Yardi eLearning

Yardi eLearning supports SCORM courses created in other authoring platforms, or those purchased from third-party vendors. Upload your external SCORM courses as a page with a course and issue it as a step in learning plans. Customize the SCORM-based course using Yardi eLearning tools to add pages before and after the SCORM page to embellish the off-the-shelf content with your own instructions, policies, tests, eSign documents and assignments.
At Yardi our mission is to provide our clients with superior products and outstanding customer service, while we take care of our employees and the communities where we work and live. With that commitment, Yardi leads the industry in providing full business software solutions for real estate investment management, property management, financial accounting, asset management and ancillary services. Organizations like yours have been using our proven and mature software with confidence for decades.