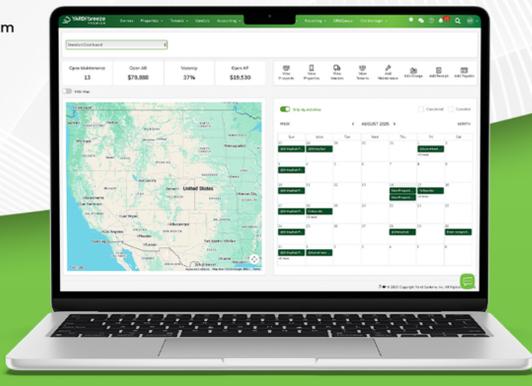


UPGRADING TO YARDI BREEZE

Welcome! In this guide, we'll walk you through the upgrade process from your current Yardi program to Yardi Breeze or Yardi Breeze Premier.

Our dedicated team has helped thousands of companies 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 and a conversion account manager.

Kickoff call:

Your conversion specialist and account manager will schedule a call to discuss your goals, project schedule and 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. A specialist will help you review your data, then work with you to address any questions you have prior to the conversion date.

Early access:

To help your team get a head start on familiarizing themselves with the system before your official data conversion, we offer early access to a test environment of Breeze/Breeze Premier. This environment allows users to explore workflows, practice tasks and become familiar with the system without the pressure of affecting live data. Please note that this database will not contain any of your converted data. It's designed purely for training and orientation purposes. Once your data conversion is complete, your team will transition to the live environment.

CONVERSION

TIME: 2+ DAYS

Data conversion:

Expect at least two days of system downtime while we convert your current and historical data into a 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

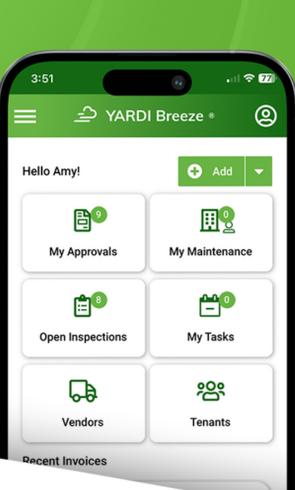
TIME: 8+ WEEKS TRAINING & GO-LIVE SUPPORT

Post-conversion checklist:

We'll work with you to review and complete the post-conversion checklist, ensuring accurate data conversion and addressing common setup items as a part of the cleanup process.

Configuration & training:

Your account manager will guide you through setup and cleanup tasks. 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 company's full financial information dating back two years. All other prior financial data will be 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 be brought into the current transaction tables, meaning anything that has not been finalized or reconciled will come over.

Example: If you're converting in November 2026, all transactions from 2026, 2025 and 2024 will be live, providing full drill down and editing capabilities. Tenant and vendor ledgers are split into live (from 2024 onwards) and archived (2023 and prior) tables.

PARTNERSHIP FOR SUCCESS

While Breeze is designed to simplify and streamline your operations, successful adoption is a partnership. There will be some work required on your end to ensure a smooth transition and long-term success.

Shared responsibility:

We'll guide you every step of the way, but your team's involvement is essential — especially in areas like data validation, process alignment and user training.

Short-term effort, long-term gain:

The initial effort will pay off quickly. Most clients see improved efficiency and clarity within weeks.

Support & resources:

You won't be alone. Our onboarding specialists, documentation and support channels are here to make the process as smooth as possible.

FAQs

Does Breeze have the same functionality as my current Yardi program?

Although Breeze and Breeze Premier have similar and enhanced features compared to prior Yardi programs, not every feature, workflow and report is identical. If there is a specific feature requirement, please consult with your sales representative.

What are the risks of staying put on my current Yardi program?

Clients who self-host may face risks related to outdated infrastructure, including legacy servers and unsupported operating systems, which can lead to reduced functionality, security vulnerabilities and limited compatibility with future enhancements.

Should I wait until the end of the year to upgrade?

There's no need to wait. Our upgrade process is flexible and allows you to convert historical data at any time. Your team can begin the transition whenever it suits your schedule.

I want to upgrade now. Do I have to pay for both programs at the same time?

No. Yardi will prorate your payment. Any unused funds from your current system will be applied toward your Breeze or Breeze Premier payment.

When is the best time of the month to schedule my conversion?

Many clients prefer to schedule their conversion mid-month to avoid conflicts with monthly procedures that take place at the start and end of the month.

What happens to the data on my current Yardi program?

If your database is self-hosted, your system will become read-only after your license extension expires. If your database is hosted, your system will not be accessible after your license extension expires. We recommend exporting any needed reports.

What is included in the archived conversion?

All financials prior to the last two years of data will be archived as journal entries. You can run high-level financial reports from this data, but you will not be able to drill into individual transactions.

What needs to be reconfigured after the conversion?

Items such as commercial property configuration, ad hoc reports, insurance information, notes from archive transactions and tenants may need to be reconfigured. Yardi's conversion team can help you with reconfiguration.

I'm currently using RentCafe. Will this be converted?

Most tenants will not need to re-register for the portal during your upgrade. If you choose to purchase Breeze, tenants will need to set up their online payment methods again within the portal. If you choose Breeze Premier, existing payment methods will be automatically carried over. RentCafe Marketing will need to be reconfigured.

My data may be old or corrupted. Do I have to convert my data?

Some clients opt for a core conversion, which brings over properties, units, tenants, owners, vendors, work orders, charts of accounts and bank account data without financials. Others opt for a fresh setup.

Can I view all historical ledgers?

Yes! The primary database ledger will be split into two sections: the ledger containing live transactions and the archive ledger containing a transaction overview without the ability to drill down to individual transactions. Sub-databases will not include any ledger information.

Is there a system downtime?

You can expect at least two days of downtime while our team performs the data conversion. You may also experience two or more weeks of additional downtime for RentCafe or other ancillaries until you're fully up and running in Breeze or Breeze Premier.

What is KYC?

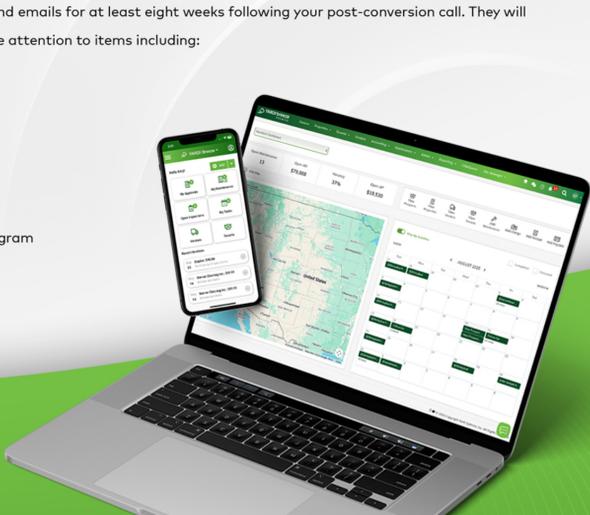
KYC stands for "Know Your Client" and is the process used by businesses around the world to verify the identity of their customers to help protect clients, communities, online payment systems and businesses. We now require that all Yardi clients complete this process.

What can I expect post-conversion?

Your conversion account manager will assist you via online meetings and emails for at least eight weeks following your post-conversion call. They will provide guidance on how to review your data for accuracy, paying close attention to items including:

- Owners and properties
- Outstanding accounts receivable and accounts payable
- Rent roll, tenant lease dates and monthly scheduled charges
- Commercial functionality (if applicable)
- Monthly processes
- Initial bank reconciliations

We encourage you to run parallel data entry in your previous Yardi program until data accuracy is confirmed.



WE'RE ALWAYS HERE TO HELP

With unlimited live chat support, 24-hour online Help Center access and included phone support, 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