

# SWITCHING TO YARDI BREEZE

**Welcome!** Here is a high level overview of what the first six weeks will look like when you switch to Breeze or Breeze Premier.

Our expert team has helped over 8,000 businesses make the transition, and we're looking forward to supporting your success and helping you achieve your goals.



## BEFORE THE SWITCH

Let's look at what we'll do before you "turn on" Breeze or Breeze Premier. It's a straightforward process, and you'll be assigned a **dedicated account manager to assist you every step of the way.**

- Explore software options with an expert
- Select the best plan for your business
- Provide us with all users, roles, reports and data necessary for the conversion
- Send property photos and other assets for corporate website (if applicable)
- Schedule service kickoff and data validation call

## WEEKS 1-2:

### KICKOFF, DATA VALIDATION & PREPARING TO GO LIVE

We will review corporate website options with you (if applicable) and confirm ILS syndication, screening and insurance setup. After data validation, we will prepare you to go live by reviewing company settings and charge code setup, setting up bank accounts, reviewing converted data, and setting up monthly posting and your tenant portal.

## WEEKS 3-6:

### TRAINING

We split training into four segments so you can learn how to get the most out of your new property management software. We will cover rent collection, owner reporting, bank reconciliation and end-of-month reporting. We can adjust the order of the segments to work best with where your go live date falls in the month.



## 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!**