



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 and Breeze Premier platform and its related products.

★★ **Intermediate**

These classes are recommended for users with intermediate-level knowledge of the Breeze and Breeze Premier 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.

● **Panel Discussion**

Informative discussions featuring Yardi and client experts engaging in thought-provoking conversations and sharing their perspectives on how to get the most out of their technology stack.

# PANEL DISCUSSIONS

---

## ● **The Evolution of RentCafe Resident Portal**

Explore with expert Breeze and Breeze Premier users the top ways a tenant portal can revolutionize your property management business. Discover how self-service features like online rent collection and maintenance requests, improved communication channels and data-driven insights can enhance efficiency, boost customer satisfaction and drive business growth. And get a sneak peek at RentCafe Living, a new portal and app experience with a built-in move-in checklist that allows new residents to sign up for renter essentials.

## ● **Property Management Marketing: 5 Ideas to Unlock Growth**

When it comes to marketing in property management, the landscape has changed a lot in the past few years. Digital marketing has phased out traditional paper practices and brought dynamic, exciting tools along with unique challenges. Effective property marketing leverages these digital tools, while not losing the human touch that makes resident experience and engagement efforts so effective. We'll dive into the process of constructing a good marketing strategy with 5 of the top marketing ideas for property management.

## ● **Trickster Tenants: How to Spot and Stop Them**

Join us for an informative session where we uncover the tricks used by rental fraudsters and learn how to outsmart them. We'll cover the top fraud concerns, from synthetic identities to bogus proof of income, and provide practical tips to keep your properties safe. With a mix of humor and real-world examples, you'll leave equipped to tackle rental scams confidently. Let's bust those fraudsters together!

## ● **Expert Insights: Optimizing Your Accounting Workflow in Yardi Breeze**

Join us for an engaging panel discussion featuring seasoned Breeze and Breeze Premier users who will delve into practical tips and advanced techniques for streamlining accounting processes. Our expert panelists will share their experiences and highlight best practices, common challenges and innovative solutions for optimizing your workflow. Whether you're new to Breeze and Breeze Premier or looking to enhance your existing skills, this session promises valuable insights to help you achieve greater efficiency, transparency and accuracy in your property accounting tasks.

## ● **Top Reasons Clients Upgrade From Breeze To Breeze Premier**

Join this class to learn about the key differences between Breeze and Breeze Premier, how upgrading might benefit your business and the process for making the switch (hint, it's easy). Hear firsthand from Breeze and Breeze Premier clients about their upgrade experiences and how they knew it was the right time to transition.

## ● **2025 Favorite Features**

Don't miss our client services leaders highlighting their favorite tools in Breeze and Breeze Premier that you can use now to meet today's challenges.

# 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 cheque and transferring funds to vendors or owners via Yardi Bill Pay (PAD). 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 cheque and transferring funds to tenants, vendors or owners via Yardi Bill Pay (PAD). 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 and quick refunds.

★★

## 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.



### 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.

## CANADIAN REGIONAL MODULES

---



### 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/STRATA

---



### Cover Your Assets: Managing Violations

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



### 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 Centre

Available for Breeze Premier clients, RentCafe Connect is a 24-hour maintenance call centre 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.

# MARKETING & LEASING

---

★★

## 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.



## 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.

## 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

---

★

**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.

★

## ★ **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.

## 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 Premier Mobile App**

Have you downloaded the Yardi Breeze Premier 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 Premier calendar. Join this class to learn how to set up and use the app.