

Yardi Cheat Sheet:

Welcome to YARDI!

It is very exciting that we have gotten to this point where everyone can login and start using this robust database. We wanted to create a quick cheat sheet for you to access if you need guidance on getting into the actual system.

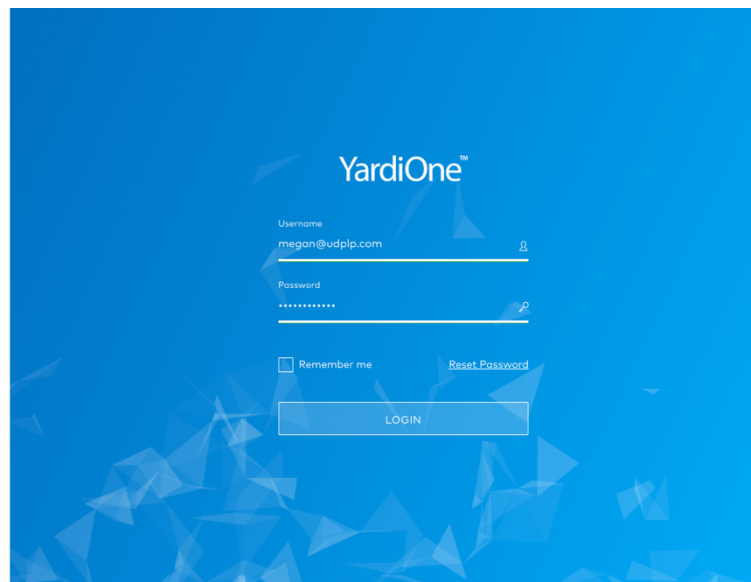
YardiOne

This will be your first point of login for all things Yardi. YardiOne is the page within Yardi that houses all of your individual access points depending on your role and needs of the database. Think of it as your door to all the different modules that come with Yardi and the modules are the keys to be able to do what you need to do. Not everyone will have the same YardiOne page, and that's OK!

To access YardiOne click here: <https://053413urban.yardione.com>

Please save this EXACT link as a bookmark in your **Chrome Browser**. If it has any other letters or numbers after the .com, it will not take you to your login page. This is very specific because this database is cloud-based and we have our own url for access. Should you have any trouble with login, let Megan or Ann know and they can walk you through this.

Once you click on the link, here is what your login page will look like:

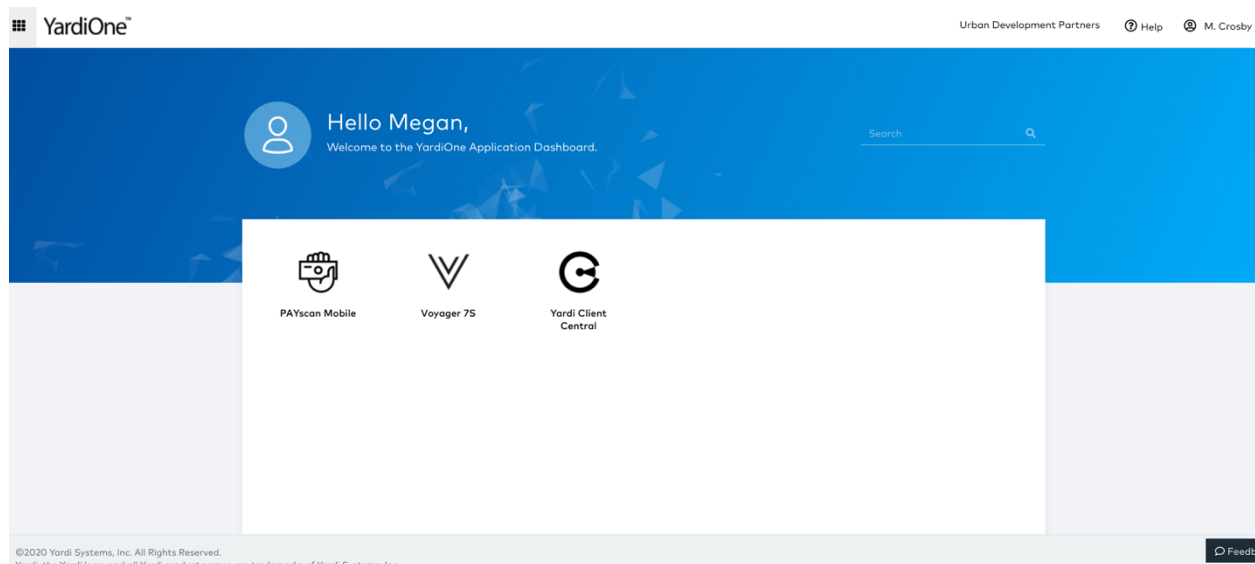


Login Info:

UserName: name@udplp.com

Password: If you are logging in for the first time to YardiOne, please press “reset password” and go through the prompts to put your new pass word in. Once you have it reset, use your new password to login.

When password is entered this is the first screen you will see. This screen houses all the modules you have access to through the Yardi database.



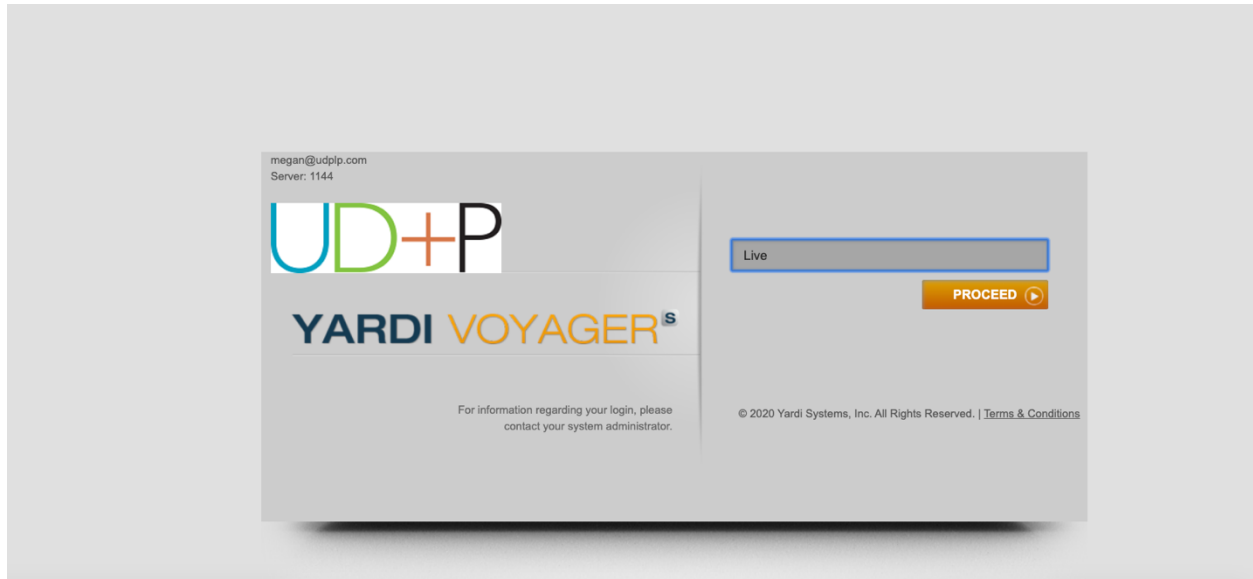
What are the modules we have access to? Thanks for asking! There are many!

1. Yardi Voyager 7s: This is the brain of the database. Everyone will have this module
2. Client Central: This houses some tutorials and videos about Yardi. I don't think many of you will access this and there are some better options within Voyager to go to for “training” which I will explain below.
3. Payscan Mobile: This is the payables invoicing mobile site. Most won't need to enter this module as you can access it directly from Voyager as well.
4. Rent Café: This is for residential and commercial marketing, portals and websites.

Essentially, the only thing you will actually need to click on with this YardiOne page to begin is VOYAGER 7S so let's start there.

VOYAGER

Click on Voyager 7s. You will likely be asked to enter your username and password. Please note: your YardiOne password is different from your Voyager password. This is purposeful for security purposes since this is again a cloud-based system. To start, I have given everyone the same password but I strongly recommend you change it.



Username: name@udplp.com

This will be your individual email address as the username

Password: snickers

Yes.... This was my favorite candy bar as a kid. You're welcome.

It will then ask you what database you want to enter. Please click **LIVE**. We had test databases through our implementation process. You can still access those if you need to but moving forward everything will be happening in the LIVE database.

When you enter Voyager it will look similar to this (again depending on your role and what you have access to).

YARDI VOYAGER Site Search

Home Help Sign Out

Community Manager Dashboard - Fairmount Apts DB Caption: LIT

Warning: Prior Leasing Week Has Not Been Closed

Resident Activity		Unit Statistics		Wednesday, April 8, 2020	
Move In	0	Total Units	80	Prop/List	fairmnt
Move Out	1	Leased Units	79 98.75%	Add Guest	Quick Guest
Deposit Accounting	0	Occupied Units	79 98.75%	Leasing Specials	Daily Activity
On Notice	1	Available Units	3 3.75%	Hot Sheet	Monitor Reports
Expiring Leases (120 days)	36	Model/Down/Admin	0 0%	New PO	New Svc. Req.
Scheduled Lease Renewals	0	On Hold Units	0 0%	Print Letters	
Alerts	3	Unit Transfers	0	Open Batches	
Maintenance		Traffic		Charges	New Charge Batch
Pending Make Ready	3	Prospect Pipeline	0	Receipts	New Receipt Batch
Pending Work Requests	5	Today's Showings	0	Payables	New Payable Batch
Completed WO Followup	0	On Waitlist	0		
		Pending Applications	0		

Calendar Dashboard Person Search

Jump To Today Day Week 2 Week Month

April 2020

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
April 6	7	8	9	10	11

From this home page you can access all the reports and items that you will need to for any given role you have with the company. For example, if you need to jump from residential to commercial, click on "roles in the upper left column and you will find the title "commercial us70" this is the Commercial Database which houses all of our information for leases, ledgers and reporting. If you need the financial reports (this is for you Anthony and Eric), go back up to roles and click on "financial manager". You will see the options and dashboard change from role to role as you maneuver through.

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YARDI VOYAGER

Home Help Sign Out

Community Manager Dashboard - Fairmount Apts

Wednesday, April 8, 2020

Prop/List fairmnt

Add Guest Quick Guest
Leasing_Specials Daily Activity
Hot Sheet Monitor Reports
New PQ New Svc. Req.
Print Letters

Open Batches
Charges New Charge Batch
Receipts New Receipt Batch
Payables New Payable Batch

Resident Activity

Administration	0
Advanced Budgeting	1
Basic iData Menu	0
Commercial US 70 Menusets	36
Financial Manager	0
i1099	3
Maintenance	3
P2P Admin	5
P2P Finance Manager	0
Tax/Insurance Tracking	
Voyager 7S Training Videos	

Unit Statistics

Total Units	80	
Leased Units	79	98.75%
Occupied Units	79	98.75%
Available Units	3	3.75%
Model/Down/Admin	0	0%
On Hold Units	0	0%
Unit Transfers	0	

Traffic

Prospect Pipeline	0
Today's Showings	0
On Waitlist	0
Pending Applications	0

Calendar Dashboard Person Search

YARDI VOYAGER

Home Lease Admin Dashboards Analytics Reports Logout

Block 75 Commercial "Slate" - Commercial Property Manager Dashboard

Wednesday, April 8, 2020

Go 05/08/2020

Financial Manager

Lease Administration

Current Leases	6
Lease Expirations within Date Range	0
Future Activated Leases	0
Pending New Leases	0
Pending Renewals	0
Holdover Leases	0
Holdover Leases within Date Range	0
Ready to Activate Amendments	0
Other Pending Amendments	0
Option Expirations within Date Range	0
Option Latest Notice within Date Range	0
Indexation within Date Range	0
Indexation (Late)	0

Space / Facilities

Stacking - Encumbrances	Stacking - Occupancy
Encumbrance Overview	Area Measurement
Receivables	
Total Units	7
Available Units	1

Work Orders / Purchase Orders

Pending Work Requests	0
Completed WO Followup	0
Open Purchase Orders	0

Dashboard Calendar Critical Dates

Training Videos:

When you enter Voyager, everyone will have access to the 7s training videos if you need guidance on how to maneuver through the system. Overall its intuitive but you may need some assistance to begin.

Here are a couple links to a few videos to get you started.

Introduction to Voyager

https://clientcentral.yardi.com/core_view_video.aspx?id=dbde1b66-04d5-4d44-b7ad-a768c10cbd29

How to Post a Work Order

https://clientcentral.yardi.com/core_view_video.aspx?id=c4edb168-7e43-46ca-952b-6eca45a34902

Payables and invoice approvals

Our payables process is referred to as PayScan. You have a few options to choose from when reviewing and approving payables in the system.

1. Through Voyager
2. Through the PayScan App

Accessing Invoice Approvals through Voyager

When in voyager, click on the roles section on the left navigation column. Click “P2P Finance Manager”

The screenshot shows the YARDI VOYAGER interface. The top navigation bar includes links for Home, Lease Admin, Dashboards, Analytics, Reports, and Logout. The main header displays "Block 75 Commercial 'Slate' - Commercial Property Manager Dashboard". The left navigation menu is expanded to show the "Roles" section, with "P2P Finance Manager" highlighted. The main content area is divided into three columns: "Administration" (with a calendar for 05/08/2020), "Lease Administration" (listing various lease metrics), and "Space / Facilities" (listing unit and work order statistics).

From there, it will take you to the main dashboard for payables. In the top toolbar (blue area) you will see the header for “dashboards”. Click that and choose “workflow dashboard” from the options.

The screenshot shows the YARDI VOYAGER 'Workflow' dashboard. The 'Next Step' dropdown menu is circled in red. Below it is a table with the following data:

Current Step	Invoice Register	Prev. Step Notes	Next Steps	Approval Notes	Payee	Property	Prop. Desc	Job	In Nu
Debt Service-Portfolio Manager Approval	3				NYL INVESTORS	slate-c	Block 75 Commercial "Slate"		374 04

Once on that main screen for your workflow dashboard click “display”. It will then pull up all the invoices for you to review and approve. To review, click on the clickable number under the “invoice register” in this photo its “3”. From there you will be able to review the details of your invoice to make sure that its correct, coded and entered how you want it prior to the check getting cut. To view the actual invoice, click on the image to the left of the invoice number. It’s the little photo icon. When you are ready to approve, in the upper left, you will see an area called “next step”. In that dropdown you will see the options for your approval of that invoice. You can send it to the next step which could be “approved” or it could be “send to principal” or “send to Portfolio Director”. The options differ for the work flow your role is assigned to. If you find a problem with the invoice, you have the option to send it back to accounting. In order to do this, you will need to also enter a note and a reason why you are sending it back. This is so accounting knows what to do with it.

You will be notified via email in the morning if you have payables for review in the system. Once you clear out your dashboard, the emails will stop until more get loaded it. Its just a gentle reminder for you that you have something in Yardi to take care of.

Maintenance

Entering a Work Order

From the “roles” section on the left, click on Maintenance. Once in the maintenance module, you will see the left navigation bar change. Click on “Add WO”. Once clicked it will take you to the new work order dashboard. Everything in BLUE will be required to fill in.

The screenshot shows the 'Work Order Dashboard' in the YARD VOYAGER system. The left navigation menu has 'Add WO' circled in red. The main form area has several fields highlighted in blue, indicating they are required for completion. These include the 'WO' number, 'Property', 'Unit', 'Bill To', 'Location', 'Employee', 'Vendor', 'Status', 'Priority', 'Category', and 'Brief Desc.'.

The screenshot shows the 'New Work Order' form. Several fields are circled in red, indicating they are required for completion. These include 'Reason', 'Property', 'Unit', 'Bill To', 'Asset', 'Vendor', 'Expense Type', 'Template', 'Priority', 'Category', 'SubCategory', 'Resolution', 'Due Date & Time', and the 'Display To' dropdown menu. The 'Save' button is located at the bottom of the form.

Once all the required information is entered, press save and the work order will be created and in the queue for the team.

Maintenance Team: To enter labor hours, click on the labor tab located in the work order.

New Work Order

Status: Call | Reason: Call | Vendor: | Expense Type: | Display Type: Default

Property: | Unit: | Priority: | Category: | SubCategory: | Resolution: | Due Date & Time: |

Access/Entry Notes: Ok to Enter | No Follow Up | Problem Description: |

Buttons: Save, New, Print, Help, View Occupant, Ready To Post?

Other Info: **Labor** | Labor Payables/Charges | Material

General Info | Billing Info | Status Dates

New Work Order

Other Info: Labor | Labor Payables/Charges | Material

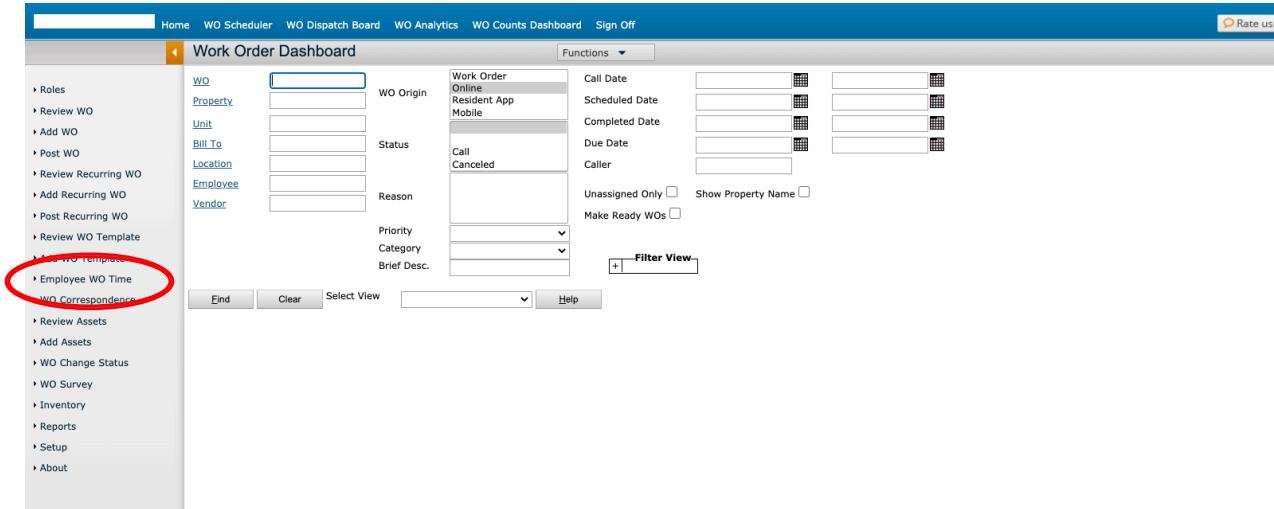
More Details

Employee	Name	Skill	Schedule Start Dt.	Schedule Start Time	Schedule Finish Dt.	Schedule Finish Time	Actual Start Dt.	Actual Start Time	Actual Finish Dt.	Actual Finish Time	Hours	Delete

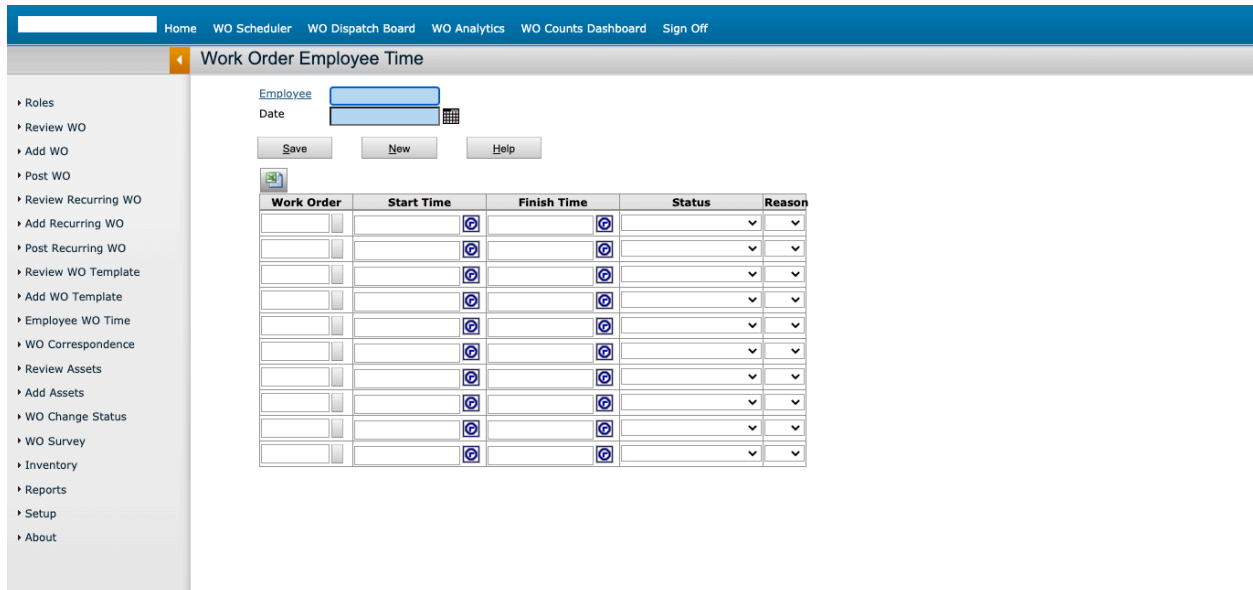
When entering your hours, enter in the employee name, start date, finish date, actual start time and actual end time and press save.

If you are doing this from the app, click on box with the arrow in the upper right corner and pick up the ticket. From there, you can add in the labor by time by pressing the “plus” sign in the upper right corner. Enter in your time and date and press save.

Another way to enter time is to click on the “Employee WO Time” on the left toolbar.



From there, it will take you to a screen where you can enter your entire day into the system from just that screen. Click on the box next to the work order area and it will bring a pop-up forward with all current work-orders open. You can select which work order you worked on enter your start time and finish time and press save.



Troubleshooting

Let's face it, it's inevitable that there will be some hiccups along the way. Don't worry, we are here to support you and help you through it. Should you find there is something not working or you need help navigating the new system reach out to Megan and Ann with your questions. We will do our best to turn the requests around within a few hours. Most issues will be able to

be taken care of in-house but in the rare event we need to reach out to Yardi for assistance, we will let you know and keep up updated on the progress of the open ticket.

There is a lot more to review but the intent of this sheet was a “quick start” guide for you to get logged in and start doing general tasks in the system.