

YASC 2024

Empowering Your Yardi Journey



**Yardi
Contender**



**Yardi
Explorer**



**Yardi
Achiever**



**Yardi
Innovator**



**Yardi
Visionary**



Book your session today!
info@gelbgroup.com | gelbgroup.com

Dear Valued Partners and Yardi Community,

Happy 40th anniversary to Yardi and the strong community it has built. What an incredible journey it's been!

Since becoming a Yardi independent consulting organization in 1996, our mission to *empower, create, and inspire* has driven us to continually innovate. Today, our growing team has over 300 years of combined real estate, property management, and Yardi expertise. As we innovate and enhance our leading-edge capabilities, we will continue to partner with you to build your Yardi vision and support your roadmap for success.

To that end, we are excited to introduce **Gelbgroup's Yardi Maturity Assessment**.

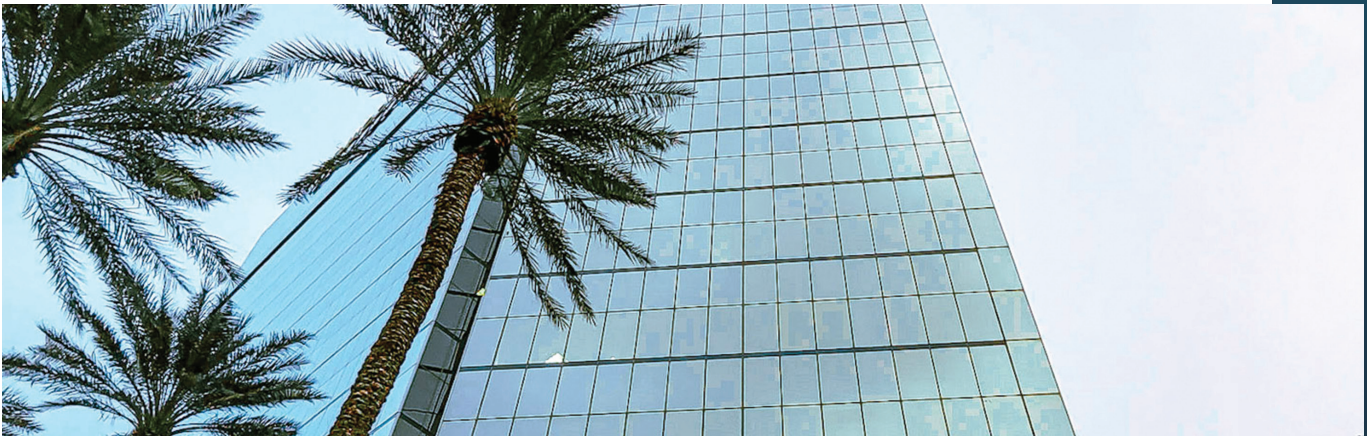
There's nothing like it in our industry. Developed from the Gelbgroup Innovation Lab, we designed it to better understand challenges and their implications. It's also an objective way to identify blind spots that can adversely and unexpectedly impact business performance. Our aim is to empower every step of your Yardi journey by sharing specific initiatives being undertaken by leading companies who are fully maximizing their Yardi investment.

So, as we celebrate milestones together, we look forward to continuing our journey of growth, innovation, and partnership. From my team to yours, here's to many more years of shared success!

Sincerely,

Geoffrey Gelb

Founder and President



The Five Stages of Yardi Maturity

Each stage represents a significant milestone in an organization's journey towards optimal Yardi utilization and business excellence. Want to find out where you are on this path? Book your personalized Yardi Maturity Assessment at gelbgroup.com/YASC2024.



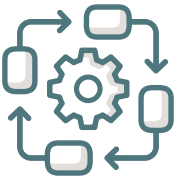
Yardi Contender:

You've taken the first step on your Yardi journey. Processes are still reactive and Yardi usage may be limited. There's untapped potential in your systems and people. With the right guidance, you're poised for rapid growth and improvement.



Yardi Explorer:

You're starting to harness Yardi's power. Some processes are standardized, and basic governance is in place. Your team is gaining Yardi knowledge, and data management is improving. You're on the right track, but there's still much to explore.



Yardi Achiever:

You've established a solid Yardi foundation. Processes are well-documented, Yardi is integrated across multiple functions, and your team is proficient. You're seeing real benefits, but there's room to push boundaries and innovate.



Yardi Innovator:

You're at the forefront of Yardi utilization. Your processes are optimized, Yardi is fully integrated, and your team is highly skilled. Data-driven decision-making is the norm. You're not just using Yardi; you're leveraging it for competitive advantage.



Yardi Visionary:

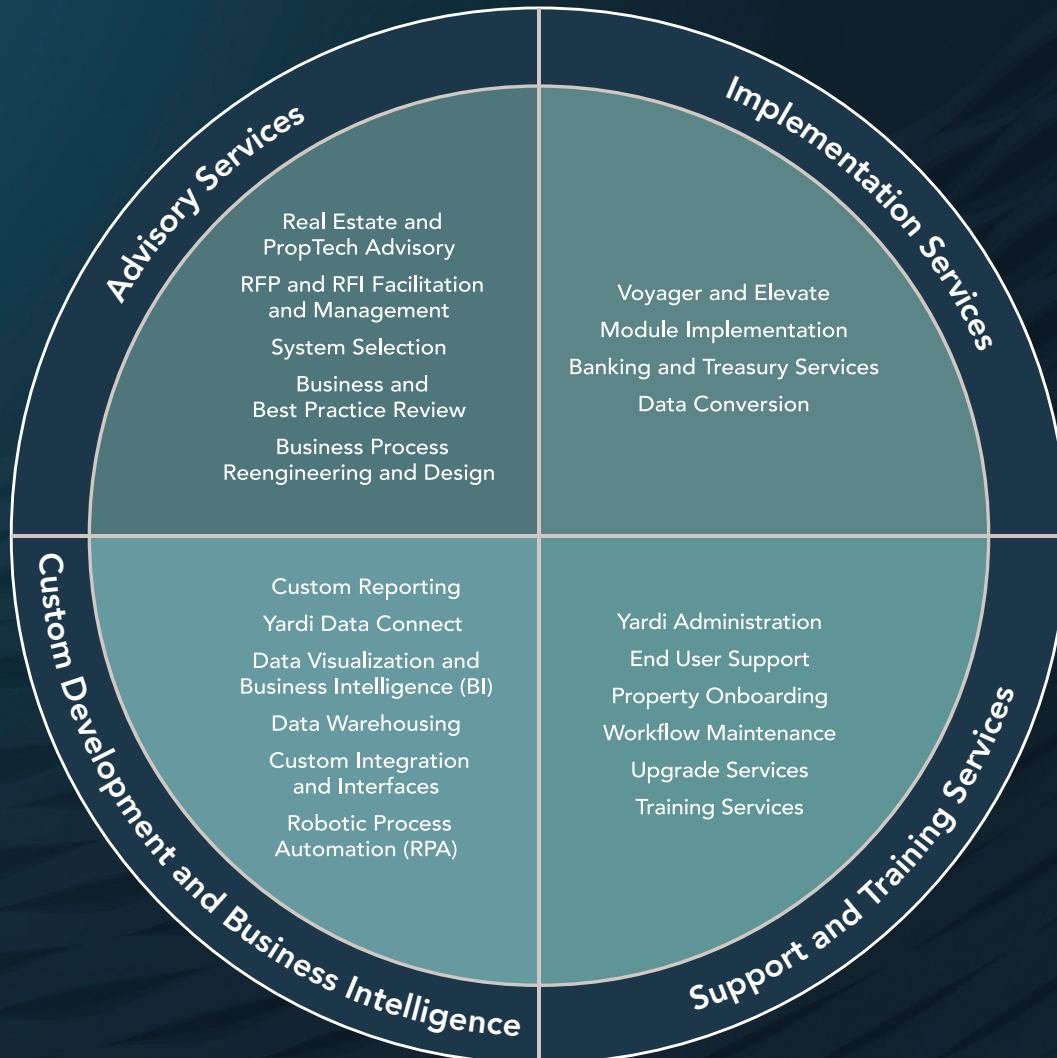
Your organization is a beacon of innovation, with Yardi at the core of your digital strategy. Continuous improvement is embedded in your culture, and you're setting industry standards. The sky's the limit!

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With roots in real estate and property management, **Yardi is in our DNA**

Gelbgroup Consulting specializes in Yardi Systems, Inc.'s suite of products.



Advisory Services

At Gelbgroup Advisory Services, our team brings an average of 25 years of real estate experience to help companies establish and implement leading practices. We are committed to delivering top-tier advisory services tailored to your unique needs.

Real Estate and PropTech Advisory

Stay ahead with our Real Estate and PropTech Advisory services. We help you leverage the latest technologies to optimize operations and enhance customer experiences.

Operating Model and Business Process Engineering

Streamline operations with our Business Process Engineering. We enhance efficiency and eliminate bottlenecks for smooth business operations.

System and Services Selection

Make informed decisions with our System and Services Selection. We recommend best-fit solutions aligned with your strategic goals.

Business Process and Best Practice Reviews

Gelbgroup Business Process and Best Practice Reviews focus on optimizing your organization's processes and Yardi system. We assess your business processes to identify inefficiencies and recommend best practices that enhance productivity. Our Yardi assessment ensures your property management software aligns with your strategic goals, enabling seamless operations. With a holistic approach, we deliver actionable insights that drive performance improvements, increase your return on investment, and support sustainable and scalable growth.

Implementation Services

Gelbgroup specializes in implementing Yardi solutions across various property industry verticals, including all facets of Commercial, and Residential sectors.

With over three decades of experience, we have successfully executed hundreds of ground-up Yardi implementations. Our approach is to fully integrate and collaborate with your team to understand your

business objectives, stakeholders, and operational requirements, ensuring your Yardi platform is tailored to meet your short, medium, and long-term business goals.

Our expert team brings diverse skills and firsthand industry knowledge, ensuring a seamless transition and effective implementation.

Beyond core functionality, we pride ourselves on our deep knowledge of many of Yardi System's specialty modules, functions, and associated business processes.

Our expertise includes hands-on experience, in-depth subject matter knowledge, and thought leadership in the following areas:

- Yardi Investment Suite
- Yardi Job Cost and Construction Manager
- Yardi Budgeting and Forecasting Tools (ABF, Forecast Manager, Forecast IQ)
- Yardi Residential Products
- Yardi Procure to Pay
- Yardi Facility and Maintenance Management Products
- Yardi Energy Suite
- Yardi Leasing and Deal Management Tools
- Yardi Senior Living
- Yardi Kube Coworking

Whether you are starting your Yardi journey or expanding your ecosystem with one of the many specialty modules, Gelbgroup ensures a tailored, efficient approach that maximizes the value of Yardi within your business.



Upgrade With Confidence

Gelbgroup's Expert Guidance for
Your **Yardi Voyager 8** Journey

- Readiness Analysis
- Gap Analysis
- Change Management & Training

Contact info@gelbgroup.com
to schedule your
initial consultation



Data Conversion and Migration Services

Gelbgroup's Data Conversion and Migration services are designed to ensure a seamless transition of critical data when migrating from other ERP and accounting systems. Our services are adept at handling the intricate challenges of data migration, whether you're moving from legacy systems to Yardi or managing the transfer of data due to changes in ownership or management.

We begin by thoroughly analyzing your existing data structures and requirements. Then, our team works closely with you to develop a detailed data conversion plan that accurately captures and maps all relevant information. This strategic approach minimizes the risks associated with data loss, inaccuracies, or operational disruptions during migration.

Our experts have extensive experience managing and converting complex data sets, including financial records, tenant information, lease agreements, and other critical business data. We employ advanced tools and methodologies to ensure that the migrated data is transferred accurately and seamlessly integrated into the new system, fully aligning with your organizational workflows and requirements.

Throughout the migration process, we prioritize the integrity and security of your data. Our team conducts rigorous validation and testing procedures to ensure that all data is correctly mapped, verified, and ready for the final transfer. This meticulous attention to detail ensures that your operations continue without interruption or inconsistency.

Whether you are transitioning to Yardi from another system or managing data transfers due to changes in property ownership or management transfer, Gelbgroup's Data Conversion and Migration services provide the expertise and support needed to ensure a successful and stress-free migration. We aim to enable your organization to maintain operational efficiency with complete confidence in the accuracy and integrity of your data.

Support Services and Gelbgroup Premium

Support Services

Gelbgroup Support Services offer industry-leading Yardi expertise to optimize your platform, streamline operations, and drive business growth. Our team provides tailored solutions for various real estate and property management verticals.

Core Offerings

- 1. Yardi Administration:** Comprehensive management and optimization of your Yardi system
- 2. End User Support:** Prompt, expert assistance to maximize productivity and minimize downtime
- 3. Security Review & Administration:** Proactive safeguarding of your Yardi systems and processes
- 4. Property Onboarding & Maintenance:** Seamless transition and ongoing support for property management
- 5. Staff Augmentation:** Flexible, skilled support during peak times or specific projects
- 6. Yardi Aspire Platform Management:** Optimization of training and development through Yardi Aspire
- 7. Workflow Maintenance:** Design and implementation of efficient, streamlined workflows

	SUPPORT SERVICES STANDARD	SUPPORT SERVICES ADVANCED	GELBGROUP PREMIUM
End User Support	✓	✓	✓
Advanced Module Support	N/A	✓	✓
Yardi Administration	✓	✓	✓
Service Level Agreement	Standard SLA	Standard SLA	Priority SLA
Excellence Dashboard	N/A	Limited Access	✓
Dedicated Support Team	N/A	✓	✓
Dedicated Account Manager	✓	✓	✓
Discounted Development Services	N/A	N/A	✓
Discounted Advisory Services	N/A	N/A	✓
Discounted Gelbgroup Academy Courses	N/A	N/A	✓

The Gelbgroup Difference

- Unparalleled Yardi expertise and industry knowledge
- Strong partnerships with clients and the Yardi team
- Innovative solution-finding culture
- Dedicated team committed to client success
- Continuous improvement through ITIL-based problem management

Introducing Gelbgroup Premium

Gelbgroup Premium is our most comprehensive support package, designed to provide strategic value and enhanced services for organizations looking to maximize their Yardi investment.

Key Features of Gelbgroup Premium:

1. Strategic Advisory Support

- Annual Strategy Meeting and Roadmap Development
- Quarterly Advisory Meetings with key stakeholders
- Align your Yardi platform with long-term business goals
- Proactive optimization recommendations

2. Developer Support

- Custom scripting and report development
- Tailored solutions for unique business needs
- Ongoing maintenance and updates

3. Enhanced Service Level Agreement (SLA)

- Priority response time
- Dedicated support team for faster issue resolution
- Proactive monitoring and issue prevention

4. Specialty Module Expertise

- In-depth support for advanced Yardi modules
- Job Cost, Investment Management, Advanced Accounting, and more
- Optimize complex functionalities for your specific needs

5. Excellence Dashboard

- Real-time visibility into support metrics and system performance
- Identify trends and improvement opportunities
- Data-driven decision-making for Yardi optimization

6. Continuous Improvement

- Regular system health checks and optimization recommendations
- Stay up-to-date with Yardi best practices and new features
- Ongoing training and knowledge transfer to your team

Why Choose Gelbgroup Premium

- Transform Yardi from a tool to a strategic asset
- Reduce operational overhead and focus on core business activities
- Accelerate ROI on your Yardi investment
- Access to senior Yardi experts and thought leaders
- Tailored support that grows with your business

Learning and Development

Bespoke Training

With Gelbgroup, you'll have access to a full spectrum of training and learning, and development (L&D) solutions. For example, when we're in an Implementation engagement with you, a right-sized user training program will be a crucial part of the program.

Additionally, if training or upskilling is required to increase adoption of an upgrade, specialty implementation, new integration, or new process, we are here to support you.

Yardi Aspire — Custom Courses and Ongoing Administration

We support Yardi clients whose chosen learning management system (LMS) is Aspire but do not have the internal resources to implement or manage the system and assist each member of your organization to fulfill required training.

Gelbgroup's Yardi Aspire Implementation solution includes:

- Creating scheduled reports for decision-makers and supervisors
- Developing a custom policy and procedure library and review process
- Ensuring that data import/export from payroll, HRIS, or Voyager is properly set up
- Personalizing the learner experience by automating the assignment of training based on job role, location, department, or property type
- Creating custom learning plans and assignment rules, with an incentive system of reward points and achievement badges

Gelbgroup's Yardi Aspire Support solution includes:

- Ensuring that training and knowledge resources are up to date with new assets and training visibility rules are up to date
- Managing live training events, from company conferences and classroom training to webinar training with service provider integrations
- Monitoring Daily, Weekly, Monthly, Semi-Annual, and Annual Admin checklists to identify additional service opportunities

Gelbgroup Academy

Gelbgroup Academy is the industry's preferred exam-based program for training Yardi administrators and power-users. The Academy is currently offering a technical development-oriented workshop series.

Dev 1: Database Schema and Scripting Basics

Ideal for beginners seeking a starting point in SQL, this course covers the fundamentals of database structure and SQL syntax. You'll gain familiarity with core scripting terminology and be introduced to ySQL, Yardi's SQL scripting portal. You will write several basic scripts, equipping you with essential skills for effective SQL utilization.

Dev 2: Advanced SQL Scripting and Yardi Report Development

Enhance your Yardi reporting expertise in this advanced workshop, designed for Dev 1 graduates. Explore SQL report design principles and master customization strategies that address specific business needs. Gain comprehensive insight into SQL Script report components through practical, hands-on exercises. Learn to transform the SQL query from Dev 1 into a functional TXT report, ready for execution within Voyager. These advanced skills enable you to harness any Yardi data in custom reports, tailoring information to your organization's unique requirements. Strengthen your decision-making process and increase efficiency with this focused, skill-building course.

Learners across the globe have earned badges in these latest highly-rated workshops. The calendar of workshops is available at gelbgroup.com/Academy.

Custom Development and Reporting Solutions

Custom Development and Interfaces

Because of rapid changes in technology, new interfaces may be needed between best-of-breed platforms and legacy systems. For clients who have chronic issues that break their process, Gelbgroup provides custom development services to surgically solve these pain points.

By definition, workarounds are short term, band aid solutions. If you're looking for a long-term solution to end manual processes that open the door to errors and inefficiencies, our development team is here to help.

Custom Reporting

Gelbgroup specializes in custom Yardi reporting solutions. We scope projects upfront to understand your specifications, such as combining financial and job cost data. Using Yardi Spreadsheet Reporting (YSR),

we create reports that leverage available data, including custom fields and tables. We empower you with custom reporting capabilities, providing tools to generate insights without constant external support.

Our comprehensive reporting services include:

- Designing reports based on custom fields and user-defined tables
- Creating presentation-quality reports with your visual identity
- Training your team to write and modify YSR reports
- Building scalable and dynamic reports for long-term use
- Implementing complex data combinations and calculations

Business Intelligence and Yardi Data Connect

Business Intelligence Strategy Consulting Services and Data Warehouse Design and Management

Gelbgroup empowers your vision for your operations today and strategy for tomorrow.

Before you can have beautiful dashboards and charts where trends and insights pop effortlessly, there are some “housekeeping” items to attend to. Data warehouse that is. Is it well designed? Is it well-managed? Is it secure?

Gelbgroup is your partner for the full lifecycle of your business intelligence initiatives.

If you're at the beginning of your data journey, we will help:

- Design and manage your data warehouse
- Design and develop your Power BI dashboards, for your various stakeholders
- Design, build, and deploy Microsoft Power Apps

Yardi Data Connect

There's a powerful engine under Yardi Data Connect, don't tame it with a generic approach. Discover your advantage with Gelbgroup's personalized Yardi Data Connect (YDC) services.

Whether you're a Power BI pro needing help with Yardi data extraction or looking for end-to-end solutions, we've got you covered.

You'll get an expert-driven approach that goes beyond pre-built templates and limited customization. We'll work in collaboration with you to tailor every aspect of your data analytics journey, giving it the attention it deserves:

Bespoke Data Extraction and Transformation

Unlike generic solutions, our skilled developers create custom SQL scripts and Power BI Dataflows specifically designed to extract and transform your Yardi data, ensuring you have access to the most relevant, actionable insights.

Tailored Visualizations and Dashboards by Real Estate Tech Experts for Real Estate Decision Makers

Our deep industry knowledge allows us to create tailored Power BI dashboards and reports that align with your unique real estate business objectives and stakeholder needs. Our solutions are anchored in our extensive real estate experience, ensuring that every dashboard we create is designed to help you achieve your specific business goals.

Comprehensive Third-Party Data Integration

Gelbgroup goes the extra mile by seamlessly integrating data from various third-party systems, such as property management, accounting, and market intelligence platforms, directly into your Power BI environment. This comprehensive approach enables you to combine your Yardi data with other relevant sources. Thus providing a truly holistic view of your real estate portfolio and empowering you to make data-driven decisions based on a complete picture of your business.

Dedicated Guidance and Support

With our deep understanding of the real estate industry and years of partnership with Yardi, we don't just deliver a product and leave you to navigate it alone. Our ongoing support and advisory services ensure you have a dedicated partner with real estate expertise throughout your analytics journey, helping you maximize the value of your Yardi data.

Automation and Integrations

Yardi Admin Tools

This is a set of time-saving tools and functions to enhance your experience with Yardi's suite of products. Some of the offerings include vendor merge function, copy residential agents, residential copy results and reasons, copy residential make ready templates, copy unit addresses, property control report, ability to make vendors inactive based on last activity date, update transaction notes, user lockout feature, update prospect agent, copy side menu and title menu, and many more.

Bank Reconciliation Helper

This is a custom module that facilitates loading electronic bank statements to clear checks, deposits and journal entries in Voyager's bank reconciliation screen. This ensures a faster and more accurate monthly reconciliation of cash.

- Supports multiple banks and multiple accounts
- Includes a report to show discrepancies between Voyager and the bank statement
- Identifies transactions the bank has recorded which have not yet been posted to the general ledger
- Supports the banking standard BAI2 file type

Positive Pay

Many banks offer a service that allows you to provide a file to them after every check run. This file tells the bank which checks you have written. If a check is presented for payment that is not on the list or the dollar amount is different, the bank knows that item might be fraudulent.

Payment Buddy

Integrates with payment processors to speed payments, reduce labor-intensive processes, and exchange transactional information. Creates payment files for transmission to banks or other institutions, supporting various payment methods. Payment Buddy integrates with the most popular banks including:

- Wells Fargo Payment Manager® Integration
- Bank of America Paymode Integration
- J.P. Morgan Chase Payment Processing Integration

Account Tree Builder

Standard account trees are based on the system chart of accounts, which are not editable. What if you could set up custom account trees and automatically add newly created accounts to all custom account trees? Now you can. Set up custom account trees and let the system manage them according to your configuration. The build function can be scheduled to run automatically at specified times throughout the day.

1. Create an account tree structure
2. Define the accounts or ranges of accounts you want to include/exclude (supports multiple accounts and ranges)
3. Run custom account tree build functions

Balance Sheet Reconciliation Workbook

The Balance Sheet Reconciliation Workbook creates a fully contained Excel workbook designed to tie out and document all balance sheet accounts with the click of a button.

Key features:

- Subledger reports with GL tie-outs and analysis for cash, AR/prepay accounts, AP, security deposits, and fixed assets
- Worksheets to track non-subledger assets and liability accounts with tie out to the GL
- Prepaid/accrual schedules for property tax, insurance, and other prepaids
- Accrued expense calculation worksheet with daily rates, contract amount, and one-time accrual calculations
- Blank reconciliation tabs for specialized tie-outs
- Macros that pull notes and information from prior workbooks, eliminating the need to roll workbooks forward manually month over month
- Ensure data integrity with cash and accrual basis accounting comparison

Gelbgroup Reporting Suite: 7 New Configurable Reports

Must-haves for enhanced workflows for the health and performance of your portfolio

Introducing our suite of powerful, configurable reporting tools designed to transform your property management processes. These tools don't just automate time-eating tasks – they enhance accuracy, provide unparalleled visibility into your portfolio's performance, and free you to focus on strategic initiatives that drive growth.

- 1 Credit & Balance Due Letters:** Streamline tenant communications, improve collections, reduce errors
- 2 Commercial Lease Invoice Detail:** Reduce disputes by providing clear, detailed breakdowns of amounts due
- 3 Commercial Lease Invoice Summary:** Expedite payments with easy-to-understand summaries of amounts due
- 4 Commercial Rent Roll - Lease Level:** Provide stakeholders with a concise view of properties' financial health by consolidating rent roll data by lease
- 5 Recovery Expense Statements:** Simplify expense recoveries and year-end reconciliations
- 6 Pending Workflow Steps Report:** Gain full visibility and control over financial processes with a real-time view of all pending approvals
- 7 Intercompany Reconciliation Report:** Ensure Intercompany is always in balance with this segment tie out

Integrations and Interfaces

Our expertise lies in developing bespoke integrations and interfaces that connect Yardi with an array of leading applications. Some of the major applications we have integrated with include, Salesforce, SAP, Funnel, VTS, Microsoft Dynamics 365 and Procore.

At Gelbgroup, we understand that every business is unique. Our team works closely with you to tailor our integrations to meet your specific needs and challenges. With our innovative approach and dedication to excellence, you can trust Gelbgroup to bridge your systems and unlock your full potential.

Gelbgroup Procore Connector

Streamline construction management by synchronizing data between Procore® and Yardi. Eliminate double-entry and enhance efficiency in project management and accounting.

Key features:

- Push Yardi jobs, budgets, and vendors to Procore
- Sync Procore budget changes or budget modifications, commitments and commitment change orders, and subcontractor invoices including the invoice register image to Yardi
- Import Yardi Payables and Journal Entries to Procore Direct Costs

Plus, these are features available only with Gelbgroup Procore Connector:

- Integrate multiple Yardi jobs with a single Procore project through Procore's Work Breakdown Structure
- Import Procore Purchase Order invoices into Yardi
- Import Invoice Registers into Yardi Payscan with Images
- Import Prime Contract Change Orders into Yardi as Budget Revisions
- And if you require custom development related to the integration, we can partner with you on identifying a solution

Directory of the Gelbgroup Team at YASC



Cat Parks

*Team Lead,
Implementation*

Ask Cat anything about Gelbgroup and Yardi, especially: Core Implementation, Commercial, and Job Cost.



Catherine Stantus

Senior Director, Support Services

Ask Catherine anything about Gelbgroup and Yardi, especially: Gelbgroup Premium and Support Services, Aspire, Business Process Review, and Voyager 8.



Christine Burd

Senior Implementer

Ask Christine anything about Gelbgroup and Yardi, especially: Residential, Affordable, PHA, Academy, and Aspire.



Geoffrey Gelb

President and Founder

Ask Geoffrey anything about Gelbgroup and Yardi, especially: PropTech and Real Estate Strategy, Yardi Data Connect, and Virtuoso.



Kash Ziaei

Customer Success and Advisory

Ask Kash anything about Gelbgroup and Yardi, especially: PropTech, Real Estate Advisory, and Business Process Review.



Kimberly Esparza

Support Services Specialist

Ask Kimberly anything about Gelbgroup and Yardi, especially: PAYscan/Procure-to-Pay, Multifamily, Support Services, Help Desk, and System Administration.



Leslie Martin

*Vice President,
Custom Development*

Ask Leslie anything about Gelbgroup and Yardi, especially: Yardi Data Connect, Reporting, Development, and Integrations.



Monika Jo

Marketing

Ask Monika anything about Gelbgroup and Yardi, especially: Learning and Development, Academy, Integrations and Automations, Immersive Technology, Generative AI, and Marketing.

With roots in real estate and property management, **Yardi is in our DNA.**
We're here to increase your organization's confidence, competence, and
(dare we say) love of Yardi.

Experience the Gelbgroup +1 difference.



GELBGROUP
CONSULTING

Empower. Create. Inspire. Since 1996
gelbgroup.com