



**GELBGROUP
CONSULTING**
30TH ANNIVERSARY

30 years of turning **YARDI DREAMS** into reality

DREAM. DELIVER. EMPOWER.



Issue 3, Gelbgroup's Annual Magazine

info@gelbgroup.com | gelbgroup.com

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A Letter to the Yardi Community

Dear Valued Partners and Members of the Yardi Community,

For 30 years, Gelbgroup Consulting has had the privilege of growing alongside Yardi and the remarkable organizations that rely on it every day. What began as practitioners helping peers has evolved into a global consulting practice grounded in a simple belief: when people, process, and data move in harmony, lasting progress follows.

Every successful Yardi journey begins when organizations allow themselves to **Dream**—to clearly define what success truly looks like today. Calmer month ends. Stronger governance. Confident teams delivering better experiences for investors, tenants, and stakeholders. Clarity of vision creates direction.

From there, progress comes from the ability to **Deliver**. Meaningful transformation is not achieved by attempting everything at once, but by taking the right next step based on where you are now. This disciplined, thoughtful mindset continues to guide how we advise, implement, and support clients across every stage of their Yardi journey.

And throughout it all, people remain at the center. Systems do not create value on their own. When we **Empower** people with the right structure, insight, and confidence, work becomes simpler, decisions become clearer, and sustainable momentum takes hold.

To our client partners and the broader Yardi community, thank you for your trust, collaboration, and ambition. As we celebrate three decades of partnership and progress, we remain deeply committed to helping organizations realize what is possible and to shaping the future of the Yardi ecosystem together.



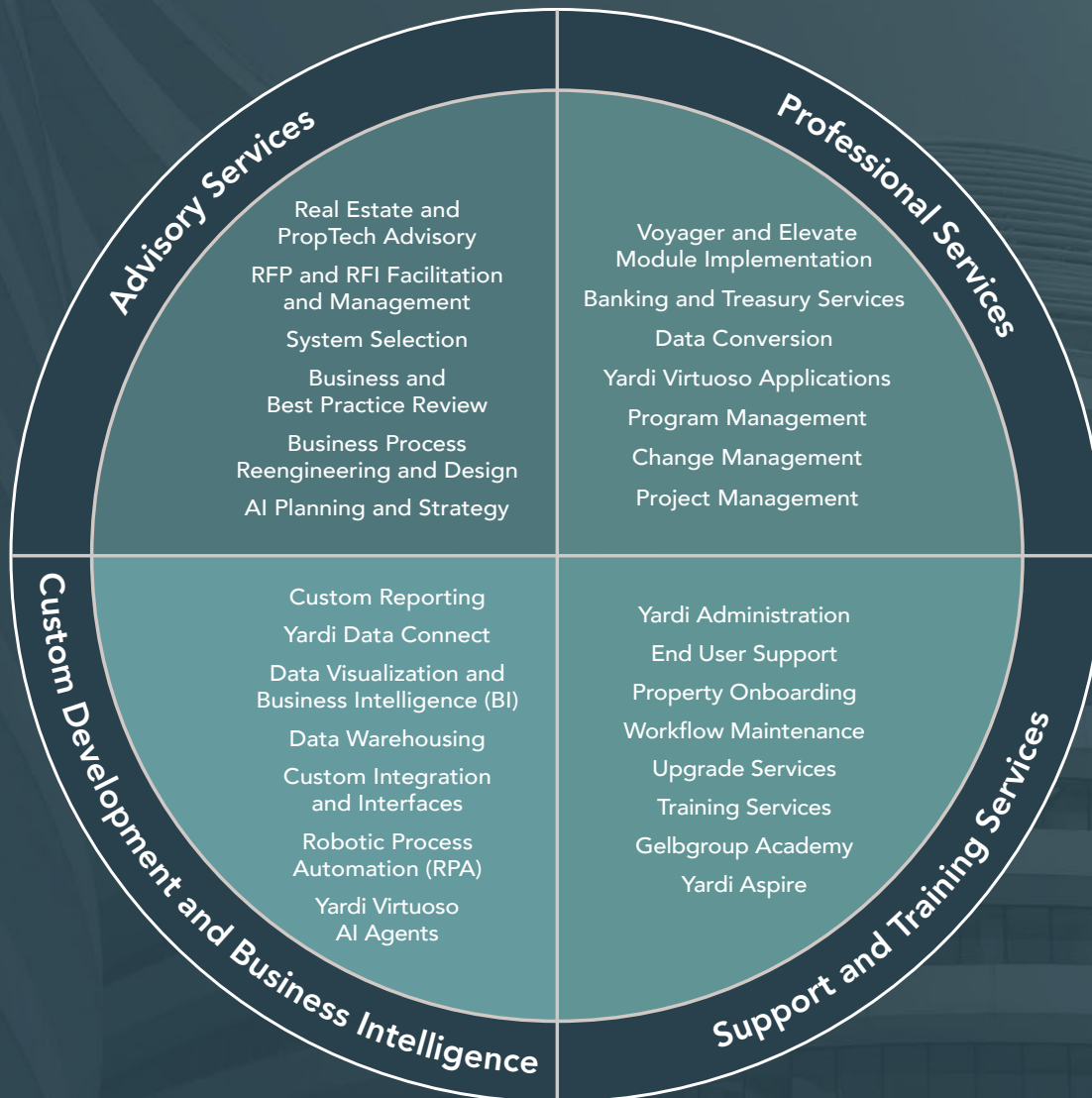
With appreciation,

Geoffrey Gelb

*Founder and President
Gelbgroup Consulting*



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.

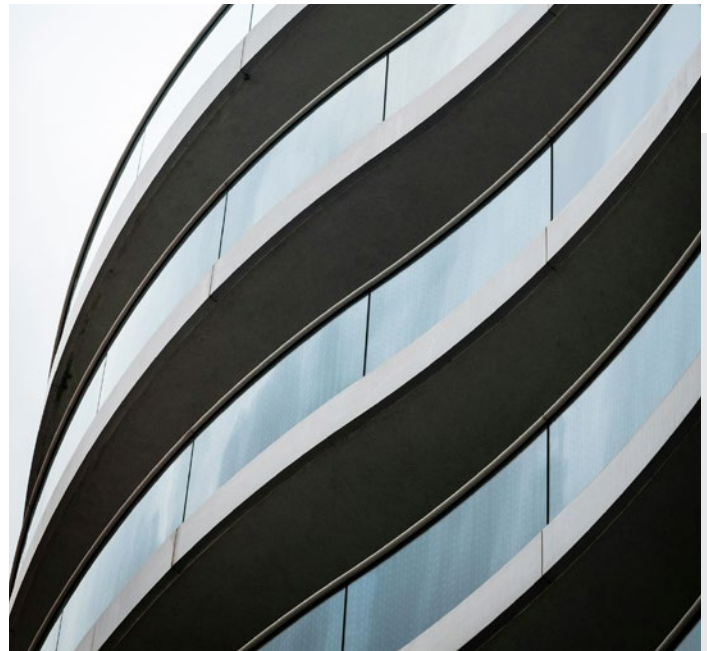
System and Services Selection

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

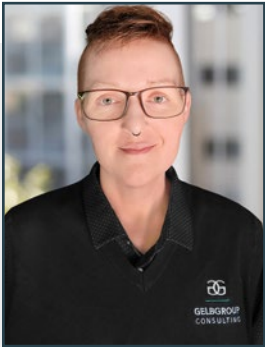
Gelbgroup Business Process and Best Practice Reviews focus on optimizing your organization's processes and Yardi system. We assess your business processes to identify inefficiencies and recommend best practices that enhance productivity.

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.



Marcon: When Vision Meets Execution in Real Estate Transformation

When Rob Malli joined Marcon as CFO, he brought something unusual to the role—a uniquely expansive portfolio encompassing finance, business technology, and people and culture. This holistic perspective would prove instrumental in transforming the 40-year Metro Vancouver real estate leader from the inside out.



Liz Oliver

"I'm more of an operations-based CFO," Malli explained, a mindset that allowed him to see beyond technical implementations to the human and operational dimensions that ultimately determine success. Having successfully implemented Yardi solutions with Gelbgroup at his previous organization, Malli recognized similar opportunities at Marcon and knew precisely who to call.

The challenge was substantial: Marcon's ambitious growth plans included doubling construction volume. Their existing systems, while functional, weren't built for that scale. More importantly, Malli didn't want to simply digitize old processes. "I did not want my team just to redefine what we were doing already. It was too easy to do that in these implementations," he noted.

The implementation of Construction Manager, Procure to Pay, Corporate Accounting, and Gelbgroup's custom Procore Connector transformed more than just technology—it fundamentally reimaged how Marcon operates.

The transformation created unprecedented transparency that extends far beyond internal operations.

"Transparency and building trust with everyone we work with" was a core objective, with vendors now able to log in themselves and track their invoices in real-time. This visibility supports Marcon's reputation for integrity while delivering what Malli calls ***"quality tools, quality interactions, quality processes, and quality forecasts."***

Perhaps most significantly, the implementation dismantled operational silos between Marcon Construction and Marcon Development, creating an integrated view that supports the company's comprehensive business model spanning construction, development, and property management.

Photo on Right: Standing (L to R) Kevin Kao, Director Corporate Accounting, Rob Malli, Chief Financial Officer, Ryan Wickham, Manager, PMO. Seated (L to R) Sarah Ozahiloglu, Manager, Strategic Initiatives Project and Elaine Spacey, Director, Project Accounting

The results positioned Marcon not just for growth, but for **sustained excellence** as they scale. By leveraging Malli's unique perspective and Gelbgroup's expertise, the project **established infrastructure** that maintains Marcon's four-decade commitment to exceptional homes and communities while preparing for an ambitious future.



But how exactly did this transformation unfold?

What specific challenges did they encounter, and how did Malli's holistic approach make the difference?

Discover the complete story of Marcon's strategic transformation at gelbgroup.com/blog



Voyager 8 Enablement Services

Gelbgroup's Expert Guidance for Your Yardi Voyager 8 Journey

Are you considering upgrading to Voyager 8?

You're not alone. We're seeing increased interest from companies ready to take advantage of the enhanced interface and integrated functionality.

The Strategic Value of Foundation Assessment

Yardi has done exceptional work making Voyager 8 enablement as streamlined as possible. However, forward-thinking organizations recognize that proper foundations are essential for maximizing advanced capabilities.

Our Pre-Enablement Approach

At Gelbgroup, we've developed a comprehensive pre-enablement process that conducts thorough system assessments to identify and address gaps before implementation:

Foundation Assessment

- Is your data foundation ready for AI-powered features?
- Data integrity evaluation and quality optimization
- Process maturity assessment for AI readiness
- Strategic sequencing to prevent team overwhelm

Ready to Learn More?

Contact info@gelbgroup.com to schedule your Voyager 8 pre-enablement consultation.

Change Management

- What's the strategic sequence for rolling out enhanced capabilities?
- Phased rollout planning based on team capacity
- Strategic communication and training programs
- Cultural alignment assessment for successful adoption

Technical Preparation

- How will the rollout be structured to minimize disruption and avoid overburdening staff?
- Report compatibility assessment and YSR conversion planning
- Configuration optimization for enhanced functionality

Future-state planning aligned with long-term technology roadmap

Why This Matters

Companies that establish proper foundations before implementation see:

- Stronger data integrity supporting advanced AI features
- Faster user adoption through strategic sequencing
- Preserved team focus on core business operations
- Optimized long-term ROI from enhanced capabilities

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.





Data Conversion and Property Onboarding

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 Property Onboarding 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.

Strategic Partnerships as Force Multipliers: Lessons from Bell Partners' Enterprise Solutions Leader

How choosing the right data conversion partner makes all the difference

When Matt Moncrief started his multifamily career in 1999, DOS-based systems dominated property management. Twenty-six years later, as Bell Partners' Director of Enterprise Solutions, he's witnessed the industry's most significant technological transformations—and learned that the right partnerships can make the difference between operational excellence and constant struggle.

Bell Partners, a fully integrated real estate investment management company with the mission to “create communities our residents are proud to call home,” has built its success on core values that guide every technology partnership decision.

“Data reliability and integrity are huge,” Moncrief emphasizes. “You can’t put AI on top of bad data and expect it to perform.” This philosophy led Bell Partners to partner with Gelbgroup for data conversion, transforming their entire approach to property acquisitions.



Matt Moncrief

The partnership's true test came when a demanding client pushed Bell Partners beyond their already impressive three-day property turnover time. What happened next surprised even Moncrief, who had previously experienced two-week conversion timelines. **“We called Gelbgroup... And they were able to help us,”** he recalls.

In one extraordinary year, Bell Partners completed 119 property transitions—with 20 in December alone. “There was never a concern that Gelbgroup wouldn’t get it done,” Moncrief reflects. The scalability wasn’t just about volume; it was maintaining quality under pressure.

What transformed this vendor relationship into something more? Moncrief discovered that Gelbgroup had evolved far beyond a service provider. “They’re highly collaborative, trusted advisors who ensure we get the results our clients expect,” he notes. But there’s more to this partnership story than technical expertise.

Read the full story and discover the specific strategies that
make this partnership work at gelbgroup.com/blog

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

SERVICE	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

Excellence Dashboard: Your Roadmap to Yardi Optimization

From Assessment to Action: Transform Insights into Results

While our Yardi Maturity Assessment tells you where you are on your journey (Contender, Explorer, Achiever, Innovator, or Visionary), the Excellence Dashboard shows you exactly what to do next. This proprietary performance monitoring platform transforms your maturity insights into specific, actionable steps that advance you to the next level of Yardi excellence.

The Excellence Dashboard provides ongoing visibility into your system utilization and identifies concrete optimization opportunities across all modules. Rather than wondering "How do we get better?", you'll have a clear roadmap with prioritized recommendations that drive measurable improvements in your Yardi ROI and operational efficiency.

Currently in beta development and available exclusively as part of Gelbgroup Premium Support Services. Features and functionality are subject to enhancement.



Fueling Efficiency: Enterprise-Grade Yardi Support at a Fraction of In-House Costs

The Challenge

A mid-sized property management company with 25+ properties and 295+ staff struggled with 2-3 day ticket resolution times, inconsistent troubleshooting, and the prohibitive costs of building specialized in-house Yardi expertise across all modules.

The Gelbgroup Solution

Our comprehensive Support Services approach delivered enterprise-grade expertise through dedicated specialists, structured problem management, and proactive issue identification—all while focusing exclusively on Yardi since 1996.

Measurable Results

96.3%

client satisfaction
rating

65-75%

reduction in ticket
resolution time

40-60%

cost savings vs.
in-house staffing

4.5 hrs

weekly time saved per
property manager

Key Differentiators

Yardi-Exclusive Focus: 800+ years of combined Yardi experience across our team

No Single Point of Failure: Cross-trained specialists eliminate knowledge silos

Knowledge Transfer Approach: Staff understand not just how to fix issues, but why they occur

Follow the Sun Support: Global team presence for responsive support across time zones

“

What impressed us most was gaining access to specialists across all Yardi modules for less than we'd pay for a single in-house expert. It's like having an entire Yardi department at a fraction of the cost.”

— CFO

To read the full case study, visit
gelbgroup.com/blog

Beyond Real Estate: How an Eight-Generation Family Firm Revolutionized Investment Reporting

When Seattle-based Laird Norton Company—an eight-generation family investment firm—needed to streamline their complex financial reporting across multiple investment types, they turned to Gelbgroup for a comprehensive solution that would change everything.

The challenge was immense: manual processes that took days to consolidate financial data across disparate systems. “We had manual and time-consuming processes to bridge multiple systems,” explained CFO Trevor Parris. The solution? A pioneering implementation of Yardi’s Investment Accounting that went far beyond traditional real estate applications.



Trevor Parris



Anthony Parvin

Gelbgroup’s Business Process Review identified Investment Accounting as the key to transforming Laird Norton’s operations. The implementation, led by project architect Anthony Parvin, created a unified system that now consolidates what once took 4-5 days into just half a day — **a 90% time reduction**.

But here’s where it gets innovative: Laird Norton became one of the first firms to use Yardi’s real estate-focused Investment Accounting platform for corporate investments, tracking everything from beverage company Zevia (NYSE: ZVIA) to other non-real estate holdings within the same system.

“We realized that Yardi’s functionality developed for real estate investors could help us track the financials of our various corporate investments,” Parris noted. This breakthrough approach created true portfolio-wide visibility across eight generations of family investments.

The transformation aligns perfectly with Laird Norton’s “patient capital” philosophy. As President Deva Hasson explained, “Our business is not Yardi reporting; our business is making good investments.” The implementation freed their team from manual processes to focus on what matters most—strategic investment decisions.



Deva Hasson

The project exemplifies Gelbgroup’s mission to help clients “love Yardi more,” transforming Laird Norton into true Yardi advocates who are now exploring additional modules like Performance Manager.

Read the complete case study and discover the full scope of this groundbreaking implementation at gelbgroup.com/blog

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.



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.



Transformco Construction Manager Implementation: From Retail Black Box to Real Estate Transparency

When Sears and Kmart emerged from bankruptcy in 2019 as Transformco, they faced an unprecedented challenge: transforming from a struggling retailer into a thriving real estate company. But there was one major problem—they had no idea how to be a real estate company.

"We simply did not know how to be a real estate company; all of our processes were powered by retail software," explains Michelle Cameron, now former Senior Director, Property Controller, who describes Transformco as "a start-up company with a 130-year history."

The result? A "black hole" of capital management. Construction projects lived in disconnected Excel spreadsheets. Leadership had zero visibility into project costs. Every time executives asked about capital expenditures, the team felt anxiety instead of confidence.

Enter Gelbgroup and implementation expert Liz Oliver. Through a strategic business process review, they identified Construction Manager as the key to unlocking Transformco's potential.

"When implementing Construction Manager for Transformco, I saw a team that was uniquely enthusiastic and ready for change," notes Oliver. *"During our discovery sessions, they were already asking when they could start using the system."*

The implementation was nothing short of revolutionary. Transformco now tracks financials down to individual units within subdivided former Sears locations—granularity impossible in their retail-oriented system. They've established streamlined monthly draw processes with lenders and created unified expense frameworks across all departments.

"We're now excited to show it off," Cameron shares. ***"Real estate is a very fast industry. If you are slow to react, you miss deals. Construction Manager now provides the foundation for quick yet sound financial decisions."***

The transformation goes beyond software—it's about establishing the financial foundation for Transformco's rebirth as a national real estate powerhouse.



Discover the complete transformation story and learn how Gelbgroup helped turn retail chaos into real estate clarity at gelbgroup.com/blog

Pick up something special for your Yardi team at the Gelbgroup Utilities & Reports Store!



For over 25 years, we've been helping organizations like yours get the most out of Yardi. Along the way, we've developed specialized tools and reports that address common pain points we've observed across hundreds of implementations.



Yardi Utilities:

This is a set of time-saving tools and functions to enhance your experience with Yardi's suite of products.



Yardi Reports:

These configurable reports are must-haves for the health and performance of your portfolio.



Gelbgroup Virtuoso Agents:

Available in the Marketplace for eligible Yardi clients.



Check out what's available at gelbgroup.com/store

Yardi Virtuoso AI Agents

Exploring the Future of Property Management Automation

AI-Powered Solutions Built for Real Estate

Yardi Virtuoso represents an emerging advancement in property management technology, bringing AI-powered automation specifically designed for the real estate industry. Unlike generic AI tools, Virtuoso is being developed to understand the unique workflows and requirements of property management operations.

“Generic AI tools have opened the door, but the real estate industry needs specialized solutions that understand its unique language, workflows and constraints. Virtuoso AI Agents deliver intelligence that plugs into the way property management actually works.” — **AKSHAI RAO, PRESIDENT AT YARDI**

Gelbgroup: Your Virtuoso Partner

As a member of Yardi's independent Consultant Network, Gelbgroup is positioned to help clients explore and implement AI automation as these capabilities continue to develop.

Our Virtuoso Readiness:

- **ICN Member** with proven Yardi implementation expertise
- **Early Adopter** perspective on emerging AI capabilities
- **Strategic Guidance** for AI automation planning

Why Partner with Gelbgroup?

- Over 30 years of Yardi expertise
- Real estate industry background
- Comprehensive approach to people, process, and data
- Established relationships within Yardi's ecosystem

The integration of AI into property management represents an opportunity to enhance operational efficiency and free teams to focus on strategic initiatives. As Virtuoso capabilities expand and become more widely available, having the right consulting partner will be essential for successful adoption.

Virtuoso and Gelbgroup: Leading AI Transformation

Virtuoso AI Agents represent a new era of property management automation, and Gelbgroup is at the forefront of this transformation. We provide strategic guidance to help clients understand how AI can reduce manual tasks and improve decision-making. Our narrative is simple: AI is not just about technology—it's about freeing your teams to focus on strategic initiatives while maintaining compliance and control.

Ready to explore AI automation for your property management operations? Contact us to discuss Virtuoso readiness

Banking, Treasury, and Accounting

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

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



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.



Gelbgroup Academy is the industry's preferred exam-based program for training Yardi administrators and power-users.

Learners across the globe have earned badges in highly-rated Gelbgroup Academy programs.

Prerequisite

Enrollees must be full-time, permanent employees of an organization with a Voyager license in good standing.

Here are some takeaways shared by learners in a post-workshop survey:

BEGINNER FRIENDLY & FOUNDATIONAL

*"WONDERFUL **starter class**. I will have all of my new technical analysts take this course for sure!"*

RELEVANT

An overwhelming majority **STRONGLY AGREED** that the content is useful in the context of their current job responsibilities.

EMPOWERING

*"SQL is no longer as foreign as it looks. I learned how to **read and find data table information**. Now that I know about the Yardi schema, I can explore more data tables on my own."*

The Gelbgroup Academy calendar will be available at gelbgroup.com/Academy

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 Yardi Maturity Assessment

Your journey begins with loving Yardi more. We want to get to know you to empower you on this path – and this is a great place to start. Each of the five stages 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? Take this free assessment on gelbgroup.com/YASC-2026.



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!



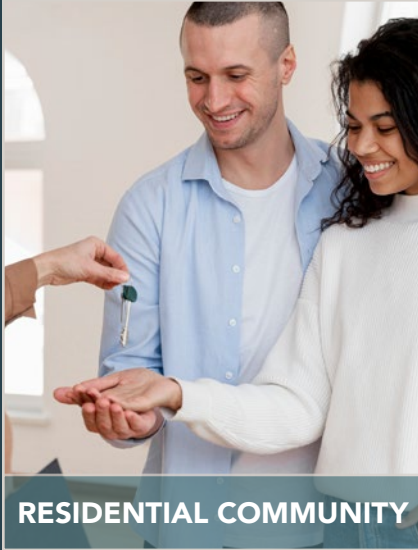
Together, let's make your
Yardi dreams come true.

Gelbgroup Consulting is a founding member of the
Yardi Independent Consultant Network (ICN).

Dream. Deliver. Empower.



Ready to transform how you deliver value?



Where are you on the Yardi Maturity Journey?

Are you a Contender, Explorer, Achiever, Innovator, or Visionary on the Yardi Maturity Journey?

To find out, take our **FREE ASSESSMENT** (see details inside)



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