



Client Services and Implementation

The Global Leader in Asset and Property Management Software

World-Class Support

Ready and Able To Meet Your Business Needs

Yardi Client Services is dedicated to providing unparalleled service in support of Yardi's industry-leading asset and property management software. Our comprehensive support program offers a wide variety of services including data conversion, system implementation, custom programming, training, application hosting, and more. Ensuring that you are familiar with the support provided with your Yardi software, as well as the additional support services available to you, is a key component of Yardi's commitment to help you achieve your business goals.

An essential part of our support program is a world-class implementation team. Members of this team work closely with you in setting up your system, converting your data, and training your personnel to fully utilize the tremendous functionality incorporated into every Yardi product. Yardi's implementation experts will work with your project team to carefully plan, skillfully execute, and thoroughly test your new system so that you are up and running quickly and reliably.

Key Services

- ▶ Application hosting
- ▶ Streamlined data conversion
- ▶ Custom programming
- ▶ Day-to-day technical support
- ▶ Workflow, process, and security analysis
- ▶ Software updates/upgrades
- ▶ Single Point of Contact for client interactions
- ▶ Assist/oversee development and execution of Implementation Plan
- ▶ On-site guidance in executing key phases of implementation
- ▶ On-site training of client staff at various stages of implementation
- ▶ Thorough testing of new system prior to going live
- ▶ Dedicated Account Manager and On-Site Implementer
- ▶ Detailed product documentation
- ▶ Online support including Yardi User Forum, Knowledge Base, and Issues Log; Voyager™ tutorial; and ASP and FAQs Web pages
- ▶ Annual user conference (Yardi Advanced Solutions Conference)



Client Central

Easily access a wide range of support tools with this Client Services Web portal.

Review and update your Implementation Plan. Get definitive answers to your questions by accessing a wide variety of online documentation including Product Manuals, Release Notes, and an Implementation Guide. Access Sample Reports, Technical Tips, ASP information, and more.



Tools To Help You Grow

ASP (Application Service Provider)

Yardi ASP Hosting is one of our fastest-growing services, providing a convenient, cost-effective solution for accessing state-of-the-art property management technology. With Yardi ASP Hosting, you benefit from the power and performance of the Yardi system without the burden of having to establish and maintain the IT infrastructure, support services, and security necessary to keep your system operating at peak efficiency. Letting Yardi host and maintain your system at one of its world-class ASP data centers frees you to focus your energy where it counts—on your business.

Business Continuity/Disaster Recovery Services

What would happen to your business if a power outage, natural disaster, or some other catastrophic event occurred? Yardi's business continuity/disaster recovery capability greatly reduces the impact of such events by providing rapid restoration of lost or corrupted data from a remote backup server, using a secure VPN connection, so you can resume operations with minimal downtime and maximum confidence in the integrity of your data. A standard feature of our ASP Hosting service, this valuable protection is also available to self-hosted clients.

SAS 70 Certified, Sarbanes-Oxley Compliant

Are you a public company? Then you will be glad to know that Yardi ASP Hosting is SAS 70 certified and Sarbanes-Oxley compliant. Yardi ASP has the controls in place to comply with the intent of the Sarbanes-Oxley Act, backed by an annual SAS 70 Type II Service Auditor's Report. Let Yardi host your system and rest easy knowing that your data is secure.

Yardi "Client Central"

Yardi Client Central is the online central repository for information available only to our clients. Here you can find implementation tools and documentation, online training, product documentation and release notes, Knowledge Base, Yardi User Forum, general news items, and a client portal to enter program and implementation issues in your personal issues log.

Online Implementation and Support Tools

Yardi provides a wide variety of online tools to help you perform your implementation. An Implementation Guide and detailed Implementation Plan—complete with dates, responsibilities, and drill-down to subtasks—allows you to make informed decisions about how to schedule your rollout and is easily accessible to you and your support team. Additionally, there is a dedicated online Issues Log where you may directly enter issues and where an accessible ongoing history is stored. Add to these Yardi's Knowledge Base and User Forum, as well

as a diverse selection of product documentation and release notes, and you have at your fingertips all the information you need to ensure a smooth implementation.

Online Training

Confused about some aspect of your new Yardi program? Not sure how to perform a particular program function? Try one of our online tutorials—the ultimate in user-friendly training aids. These brief, automated audiovisual demonstrations walk you through various components of the program and let you pause, fast forward, and rewind the demonstration, so you can learn at your own pace. It couldn't be easier, or more helpful!



Online Product Documentation

Yardi Client Central provides links to all the latest product documentation, including user manuals, release notes, new feature documents, and implementation documents. Can't find that manual buried somewhere in your office? Go to Client Central and download it.

Custom Procedure Manuals

If you desire, Yardi will also assist you in creating a custom internal procedures manual for use in training your staff on how to use your Yardi program. Your Account Manager and Implementer will assist you in tailoring one of our procedure templates to your unique business environment.

Third-Party System Integration

Integration is crucial to efficient operations. Because of this, Yardi has designed its program to interface with many other software products you may already be using. In addition, to provide you with maximum flexibility, we continue to develop interfaces to accommodate the growing number of third-party applications currently available in the marketplace.

Your Dedicated Resource For Maximizing Performance and Profitability

One of the key objectives of Yardi Client Services is to provide state-of-the-art automated solutions that will maximize your organization's efficiency and profitability. In addition to software development and quality assurance, we offer extensive support services including account management, project management and oversight, data conversion, user training, custom reporting, application hosting, business continuity, third-party system integration, product documentation, and more.



To ensure that your implementation goes smoothly and is completed on schedule, Yardi assigns an Account Manager and an On-Site Implementer to guide you through the process. The Account Manager is your primary contact during implementation and is readily accessible—by phone, fax, or e-mail—to assist you on a daily basis. The On-Site Implementer provides on-site guidance and direction on an as-needed basis, as well as on-site training at various stages of the implementation. Functioning as a team, the Account Manager and On-Site Implementer work closely with you and your staff to make sure that every phase of your implementation is executed according to plan.

In addition to live support, round-the-clock self-help is available via Yardi Client Central—a comprehensive, centralized repository of product information. Client Central is accessible only by Yardi clients and provides a wide variety of information and tools to help you get the most out of your Yardi system. Log on to this site any time of day or night to access product documentation and release notes or implementation tools, to exchange information with other clients via the Yardi User Forum, to record issues in your own implementation log, and much more.



Offices in the U.S., Canada, Europe, and Asia-Pacific

With offices in Santa Barbara, New York, Durham, Toronto, London, Amsterdam, Hong Kong, and Sydney, Yardi is an international company that provides state-of-the-art real estate and property management services over a wide geographic area and across time-zones.

Wide Range of Client Services

Market-Focused Team Support

Your account is assigned to a support team that specializes in serving clients whose portfolio type matches yours, so that the support you receive is geared specifically to your business, and so you can benefit from the collective expertise acquired by supporting a variety of clients whose operations are similar to your own.

Account Management

You will be assigned an Account Manager to serve as your single point of contact and to guide you through the day-to-day process of your implementation. Your Account Manager will help you schedule conversions, on-site training, and implementation and ensure that every aspect of the transition to your new Yardi system is handled smoothly and efficiently.

Project Management and Oversight

Yardi Client Services will also assist you in planning and managing your implementation by providing project-level advice on scheduling rollout, system and procedure analysis, and coordinating members of the implementation team.

User Training Services

Yardi employs a wide variety of methods for training you and your end-users. We offer individual training at your premises or, if you prefer, we can train you over the Internet. In addition, you have access to all Yardi training opportunities and tools, including frequent training classes throughout the year that cover the basic program and how to configure it to suit your specific needs, three yearly training conferences, online tutorials, detailed user documentation, and Client Central, a comprehensive online repository of user information.

On-site Implementation

In addition to all the available training and support services, Yardi can provide you an On-Site Implementer, who will travel to your company to assist you with the implementation of your Yardi system. On-site implementation is one of the most valuable resources we provide and will help you achieve a successful and more efficient rollout.

Technical Support/Help Desk

Yardi provides full-service technical support and help desk. Your Account Manager is fully qualified to support your product and can assist you in resolving any difficulties you may have—from data issues to properly performing a function or process. Likewise, Yardi's expert Technical Support/Help Desk personnel are available to answer questions regarding the use of your system.

Data Conversion Services

Yardi provides conversions from many different products, including AMSI/eSite, BJ Murray, MRI, NEWSTAR, Rent Roll Residential, Skyline for both DOS and Windows®, and, of course, Yardi-to-Yardi. Conversions can be performed in-house by Yardi, or you may elect to do them yourself by purchasing our Data Conversion Tool. If you have recurring conversion needs, this impressive tool is a great alternative to Yardi's in-house conversion services in that it provides increased cost savings, as well as the flexibility to schedule your conversions any time you wish.

Custom Reporting Services

Not all companies have the same reporting requirements, so in addition to the standard reporting package that comes with your program, Yardi's Custom Programming Team is ready to design and create any custom reports you may need.

Scripting Help Desk

If you have a report that is almost, but not quite, perfect or you need a simple custom report, Yardi's Scripting Help Desk can provide the modifications you need or simple custom reports free-of-charge!

Report-Writing Tools and Engine

In addition to customization services, Yardi provides a suite of report-writing tools for "hands-on" clients who want to customize reports at their convenience. These tools, along with our specialized reporting engine, provide unlimited reporting capability. Yardi Spreadsheet Link™ for financials and Yardi Ad Hoc Report Writer are available for less technical end-users and do not require programming skills. For more advanced users, Crystal Reports and SQL scripts can be utilized.

Products and Services

Integrated Systems and Optional Modules

- ▶ Investment Management
- ▶ Property Management
- ▶ Integrated Accounting and Financials
- ▶ Performance
- ▶ Budgeting and Forecasting
- ▶ RealDCF
- ▶ Executive Dashboard / Business Intelligence
- ▶ Portal
- ▶ Construction Management
- ▶ Maintenance Management
- ▶ Fixed Assets and Inventory Control
- ▶ Document Manager
- ▶ Legal

Yardi Services

- ▶ ASP Hosting Services
- ▶ Professional Services
- ▶ Project Management
- ▶ Implementation and Training
- ▶ Custom Programming
- ▶ Data Conversion
- ▶ Technical Support and Help Desk
- ▶ Report Writing

Markets Served

- ▶ Investment Management
- ▶ REIT
- ▶ Retail
- ▶ Office
- ▶ Industrial
- ▶ Multifamily
- ▶ Affordable Housing
- ▶ Tax Credit
- ▶ Rural Development
- ▶ HOME
- ▶ Public Housing
- ▶ Condo/Co-op and Homeowners Association
- ▶ Senior Housing
- ▶ Student Housing
- ▶ Military Housing
- ▶ Construction/Development

Industry Compliance Memberships



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Global Locations

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- ▶ Canada
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- ▶ Asia
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Award Winning Software

Best Provider of Property Management Software

Apartment Finance Today – 2007, 2006, 2005, 2004, 2003, 2002
Multi-Housing News – 2007, 2006, 2005, 2004

Most Innovative Technology, Building Automation Technology

RealComm "Digie" Award – 2005, 2004