

# Yardi Condo, Co-Op & HOA Suite



Optimize your association management business from owner services and marketing to operations, accounting and reporting on a single software platform.



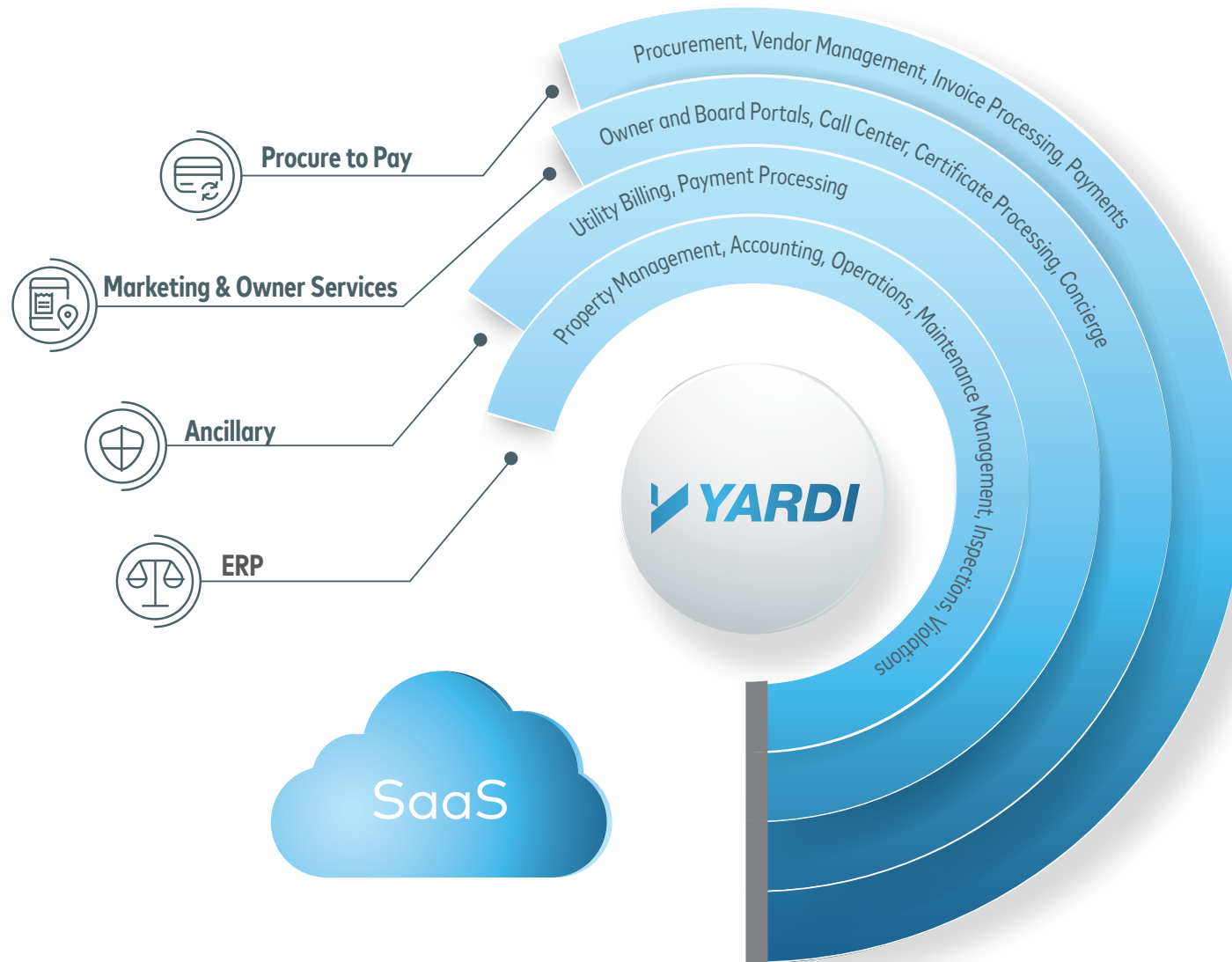
# Power Your Business With a Single Connected Solution

- Consolidate operations on one platform to work smarter, drive revenue, manage risk and gain a competitive edge
- Focus on what matters most and satisfy owners with a system that provides a portfolio-wide view and a single version of the truth
- Untether your staff with mobile access to complete reporting, approvals, maintenance, owner and resident services from smartphones and tablets
- Keep your data safe and reduce costs with an award-winning cloud solutions provider
- Leverage the experience and applied knowledge of the industry leader

## Yardi Condo, Co-Op & HOA Suite

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# Yardi Condo, Co-Op & HOA Suite





## Key Benefits

- Ensures accuracy across your organization with a single integrated database
- Maximizes efficiency with automated workflows
- Reduces costs by decreasing manual errors and redundancies
- Adapts to your business via configurable settings
- Tracks ledgers, maintenance, inspection and violation data
- Maintains critical board member and meeting records
- Integrates with optional Yardi solutions for online owner portals and paperless certificate processing





# Property Management

Automate workflows and reduce costs for managing condos, co-ops and homeowner associations with a complete online solution.



# Yardi Voyager Condo, Co-Op and HOA

Yardi Voyager Condo, Co-op and HOA is a complete browser-based solution for managing condominiums, co-ops and homeowner associations. This comprehensive system features a single integrated database with tools to track ownership and charges, calculate fees, collect payments, monitor maintenance, enforce bylaws and more. Eliminate manual processing errors and increase efficiencies by automating workflows and offering online services.

# Automated Workflows

Voyager includes industry-leading accounting and association management capabilities. Easily calculate percentage-based fees, track changes of ownership and transfer scheduled charges. Automatically calculate one-time charges so you don't have to manually create retroactive fee changes or special assessments.

## Online Access

Optimize ease-of-use across your organization with the Voyager online platform. Financial, management and administrative teams can work anytime, anywhere there's an Internet connection with mobile access from smartphones and tablets. Ensure database security with user-based permissions.

## Flexible System

Tailor screens, menus and reports to suit your organization and to adapt to regional regulations and changes in accounting principles. Extend the versatility of Voyager by adding CONDOCafé to provide additional online services, including secure owner access to view ledgers, make payments and update contact information.

## Integrated Maintenance

Enter, edit and post work orders, add specific instructions for staff and vendors, document the status of any project, create charges and payables directly from the work order record and use work order reports as dispatch tools. Add the Yardi Maintenance Mobile app to enter and manage maintenance activities via smartphones. With Yardi Inspection Mobile your staff can complete inspections for violations and architectural reviews using their mobile devices — and upload the data directly to Voyager.

**YARDIVOYAGER**

Home Help Sign Out

Condo Corp & HOA Dashboard

- Index
- Reports
- Charges
- Reservations
- Properties
- G/L - Domestic
- Condo/Corp/HOA
- Owner
- Administration
- Maintenance

**Monday, May 07, 2018**

Date Range: 04/01/2018 To 04/30/2018

Properties: 1 Units: 10

**Financials**

A/R Summary A/R Details  
A/P Summary A/P Details

**Maintenance**

Pending Work Requests: 0  
Completed w/o Follow-up: 0  
Purchase Orders: 0  
Tasks Pending: 0  
Tasks Past Due: 0

**Estimates**

Headings: 0  
Active Board Members: 3  
Archives In Progress: 0  
Legal Court: 0  
Real Persons: 10  
TOWN Legal Counsel: 11

**Links**

New PO New PO's New PO's  
Transfer Records New Section Bound  
Station Reservations

**Data!**

Cover Document: 10  
Owner Roster: 10  
Tenant: 1

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**YARDIVOYAGER**

Home Help Sign Out

HOA UNIT

Functions

Jump To

- Index
- Reports
- Charges
- Reservations
- Properties
- G/L - Domestic
- Condo/Corp/HOA
- Setup
- Administration
- Maintenance
- Inventory
- Unit Asset
- HQAD
- Correspondence
- Inclusions/With Tax

Unit: 100 Address: 4000 E DR City: Phoenix State Zip: AZ 85004 Country: US

Property: 100001 Building: Floor Unit Type: 100B01 Unit Cost: HOA Bldg: 10000 Owner Occ: YES Bldg: 10000 Bldg:

General Scheduled Charges Unpaid Charges Contacts Keys Other Info

Type	Name	From	To	Office	Home	FAX	E-mail
Condo Charge	Unit 100 Charge	04/01/2017	04/30/2017	(480) 444-4444	(480) 444-4444		info@yardivoyager.com
Unit	Unit 100 Charge	04/01/2017	04/30/2017				

**Unit** **Payment Number** **Related Units** **CONDOCalc**

No PI: \$90.00  
%Comm: 2.0000000000  
Legal Limit: \$  
Legal Unit:  
Unit No:

Exclude

Customizable dashboards maximize efficiency and transparency by allowing you to see unit-specific tasks, ownership, charges and fees in a single user-friendly interface.



# Simplified Rental Pools

Manage rental units for association owners who do not occupy a unit. If an owner asks you to manage a rental or series of rentals, you can add the unit(s) to a rental pool property in the system, add a property owner record, then move a tenant into the unit and collect monthly rent. Rental pool chargeback invoices automate the data entry from a receivable charge on the condo to a payable in the rental pool property. And with the Condo Violations mobile app, you can enter violation data from a smartphone or tablet.

# Easy Board Updates

Maintain and update board member lists and create sign-in sheets for board meetings. Scan and attach meeting minutes to the integrated meeting record. Board members have secure, 24/7 access to essential association reports through CONDOCafé.

# Built-in Violation Management

The built-in violation management workflow monitors and tracks bylaws per association. In the event a bylaw is violated, you can create custom letters with language from the CC&Rs, manage the distribution of violation letters to owners and charge fines to each owner. The violation management workflow will also allow for tracking architectural review processes within a community. Enter violation data and attach date time stamped photos from the field with the included Violations mobile app.



Manage bylaw violations and track legal actions and architectural reviews from the Violation Dashboard.

## Key Features

- Fee calculation based on percentages, shares or user-defined amounts
- Single or multiple unit to owner relationships
- Change of ownership tracking and charge transfers
- Special assessments calculation and automated retroactive fee charges
- Board member and meeting reporting tools
- Built-in maintenance, inspection and violation functionality
- Full procedure workflow for managing and tracking architectural reviews
- Rental unit management views from the condo module pages

## Key Benefits

- Integrates seamlessly with Voyager
- Supports green initiatives with online solutions
- Streamlines sharing of forms and documents
- Provides secure owner access to real-time information
- Adapts to your organization—use CONDO*Café* and CONDO*Café* Certificates independently or in conjunction
- Track packages, keys, away and visitor notifications, in-suite deliveries and more with Yardi Concierge





A modern, multi-story apartment building with large glass windows and balconies. In the foreground, there is a swimming pool with a concrete deck and a small structure. The background features lush green trees and other high-rise buildings under a clear blue sky.

# Marketing & Owner Services

Go paperless and empower your condo association,  
owners and buyers with an online platform fully  
integrated with Yardi Voyager.

# CONDOCafé

Leverage exclusive online solutions developed for condo, co-op and homeowner associations to boost efficiency at your office. CONDOCafé and CONDOCafé Certificates integrate with Yardi Voyager to provide secure access to real-time financial information, ledgers, documents, ownership details and more. Accurate electronic records eliminate filing, photocopying and storage costs.

Online maintenance requests enable speedy handling of repairs.



## Property Marketing

Showcase your condo properties with marketing websites that provide appealing, content-rich designs and easy-to-use features including large photo displays. Responsive design increases your mobile presence and improves the digital experience for customers. You can also create a corporate website to market your condo management services.

## Real-Time Access

Give owners immediate access to up-to-the-minute information about their properties, including profile updates, ledger activities and maintenance requests, without compromising security or privacy.

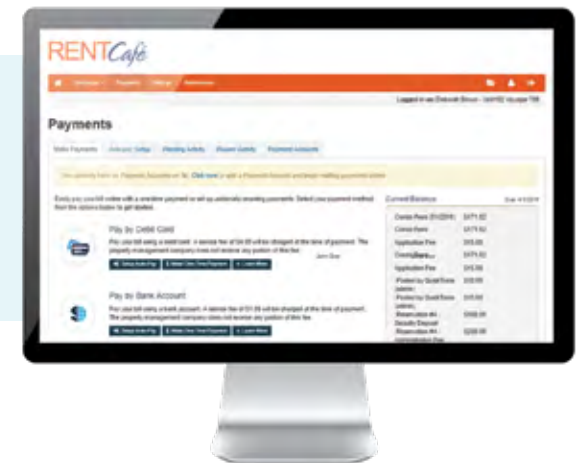
## Owner Services

Increase satisfaction by providing in-demand, expanded services that owners expect. Available as both a responsive website and a mobile app, the owner portal allows owners to easily, securely and instantly update their profiles, view balances, make payments and submit maintenance requests and suggestions for the community. Encourage owners to stay connected with your community through online announcements and calendar events.

## Document Management

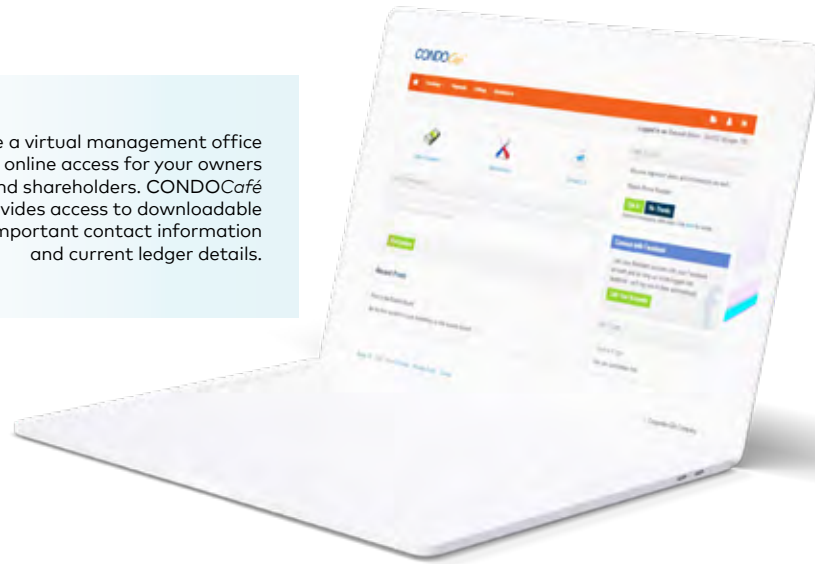
Assign documents to specific groups and roles in your organization, including legal owners, board members and committee members. Owners and residents can be assigned to one or more groups with the ability to download documents from within CONDOCafé.

Online ledgers display real-time account information. Online payments provide convenience.





Create a virtual management office with online access for your owners and shareholders. CONDOCafé provides access to downloadable forms, important contact information and current ledger details.



## Key Features

- Seamless integration with Voyager
- Dynamic property marketing and corporate websites with full mobility
- Owner access to ledgers and real-time property information
- Document management and downloads according to role
- Association calendar and message board tools
- Optional CONDOCafé Certificates provides online purchasing, processing and downloads

## Community Updates

CONDOCafé also includes community calendar and message board capabilities. Create, edit and share important upcoming association events with your owners and residents.

## Online Certificates

CONDOCafé Certificates is an optional paperless solution that integrates with CONDOCafé to automate the purchase and delivery of status certificates and other publicly available documents. Buyers, real estate agents and attorneys can search online for units, place an order, pay online and download necessary paperwork anytime, anywhere. Orders can be completed in less than two minutes, with instant notification when documents are available.

# Yardi Concierge

Provide the highest level of customer service and convenience to your residents and owners. Enhance the resident and owner experience with expanded online services through Yardi Concierge. Manage everything from one easy dashboard.



## Expanded Resident & Owner Services

Combine Concierge with CONDOCafé to increase retention by providing expanded services that residents and owners value and appreciate. Users can access important information and electronically submit requests, payments and signatures—for maximum convenience.

## Parcel Tracking & Delivery

Manage parcel delivery or drop-off requests on behalf of residents. View all parcel-related tasks on one convenient dashboard and notify recipients of delivery or pickup by email. Signature capture and LCD marquee notifications are also supported.

## Amenity Reservations

Track and maintain reservations for common areas and other amenities like conference rooms, party rooms and guest suites. Users can see availability and submit reservation requests online.

## Authorized Guests

Control access to units for authorized guests. Guest authorization includes levels of access and privileges set by the resident or owner (e.g., entry can be authorized by time of day, week or month).

## Key Tracking

Track spare keys checked out by guests using a dynamic inventory that is updated in real time. One-touch email alerts inform users when a key to their unit is checked out or returned.



## Key Features

- Parcel tracking and delivery, including electronic signatures
- Amenity reservations that support optional online payments
- Guest authorization and key tracking with email alerts
- Parking pass processing for residents and owners
- Incident logging to document, report and flag violations

## Away Instructions

Allow users to submit online requests and instructions for tasks to be performed by concierge staff during extended periods away from home. These may include mail pickup, entry authorizations, parcel delivery and other options.

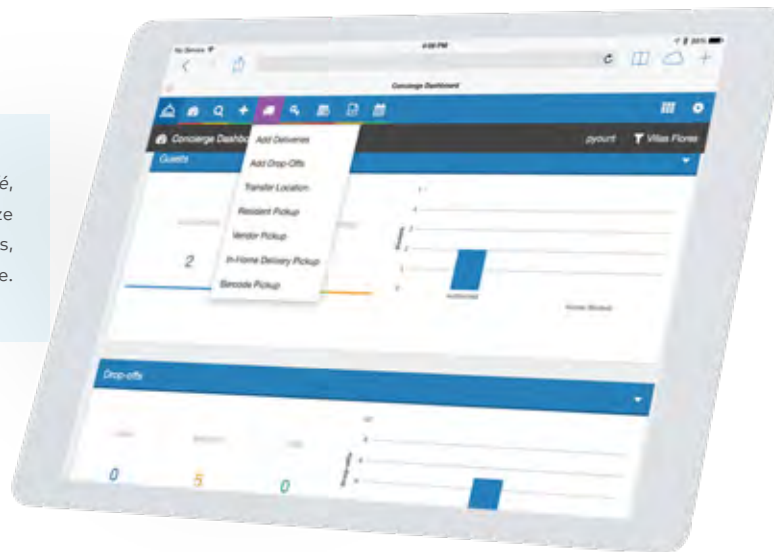
## Incident Logging

Document any incident that occurs on the premises, down to the unit level, in the system. Automatically notify multiple property management employees, distribute reports for review and flag incidents for possible issuance of formal violations.

## Parking Pass Processing

Process and track resident and owner parking pass requests, distributions and returns.

Fully integrated with Yardi Voyager and CONDOCafé, Concierge allows residents and owners to authorize guests, set notification preferences, reserve amenities, track deliveries and more.



## Key Benefits

- Increases resident satisfaction and maximizes your cash flow
- Saves time by scanning and digitizing paper checks and money orders in bulk
- Offers one-stop convenience and reduces money order issues with walk-in payments
- Provides secure instant access, confirmations via text message
- Streamlines accounts payable with automated vendor and owner payments
- Eliminates manual errors and time-consuming bank trips





# Payment Processing

Save time and maximize cash flow with a payment processing solution that eliminates bank runs, automates rent collection and simplifies vendor payments.



# Yardi Payment Processing

Increase resident satisfaction and office efficiency with Yardi Payment Processing. Manage accounts receivable and accounts payable with one system that helps you streamline rent collection, cut operational costs and reduce processing errors. Make collecting rent and other fees easier with user-friendly payment options that eliminate bank runs for your staff. Your residents can conveniently pay rent by check, online, via text or at participating retailers. Your staff can more quickly process incoming payments and outgoing payments to vendors and owners.

## Collect Online Payments

Offer paperless self-service rent payments with a recurring payment option using Yardi Online Payments. Residents can log in at any time, view their account balances and pay rent directly from a bank account (ACH payment) or with a credit or debit card. Online payments are entered directly into Yardi Voyager, with automatic deposits and easy bank reconciliation. ACH payments are sent to your bank via EFT the next day. Credit and debit card payments are processed within 2-4 days.

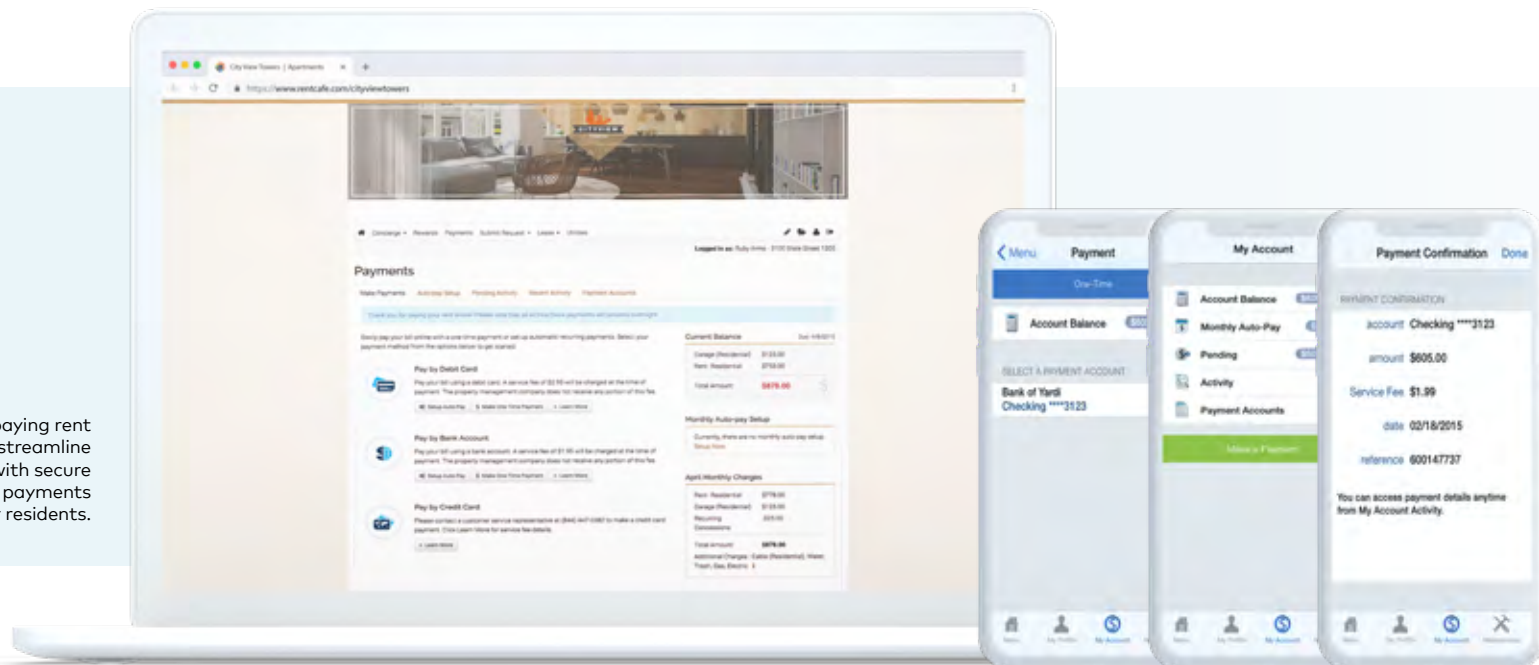
## Collect Text Payments

Give residents 24/7 convenient and secure mobile access to review balances and make payments via SMS text messaging with RENTCafé TextPay. Immediate confirmation is provided to residents making text payments from a bank account or credit or debit card. Rent payments are automatically entered into Voyager, improving operational efficiencies while increasing resident satisfaction by providing an in-demand mobile service.

## Collect Check Payments

Eliminate trips to the bank, lost checks and manual keying errors while reducing NSF risk with Yardi CHECKscan. Scan bulk batches of personal, corporate, bill pay and cashier's checks as well as money orders to greatly reduce processing time. Instantly create receipt batches in Voyager for all items and permanently store the image files. Payments are transferred electronically to your financial institution the next day, optimizing your cash flow.

Make paying rent easier and streamline collection with secure online payments for your residents.





## Key Features

- Electronic deposits for rapid availability of funds
- 24/7 resident access to make online and text payments
- Credit and debit card and ACH resident payments with recurring ACH option
- Walk-in payment service for cash payments at participating retail locations
- Voyager auto-matches charges and applies payment priority rules
- Permanent check image storage for scanned payments
- Automated check writing and electronic vendor and owner payments for outgoing accounts payable
- All transactions instantly recorded in Voyager

## Collect Walk-in Payments\*

Let residents pay rent in cash at over 20,000 participating retail locations. Our walk-in payment system (WIPS) provides the ease of a one-stop experience and reduces money order issues for your staff. This service can be easily added to your existing Yardi cash management system. Electronic payment confirmations are automatically available in Voyager the next day. Funds are made available within three business days.



## Pay Vendors & Owners\*

Speed up the vendor and owner payment process with Yardi Bill Pay. Invoices are seamlessly routed through your approval workflows. Bill Pay automatically pulls payments from your Voyager database and fulfills them based on how you pay each individual. Vendors and owners receive payment via your choice of mailed check, ACH or credit card.

\*Not currently available in Canada



## Key Benefits

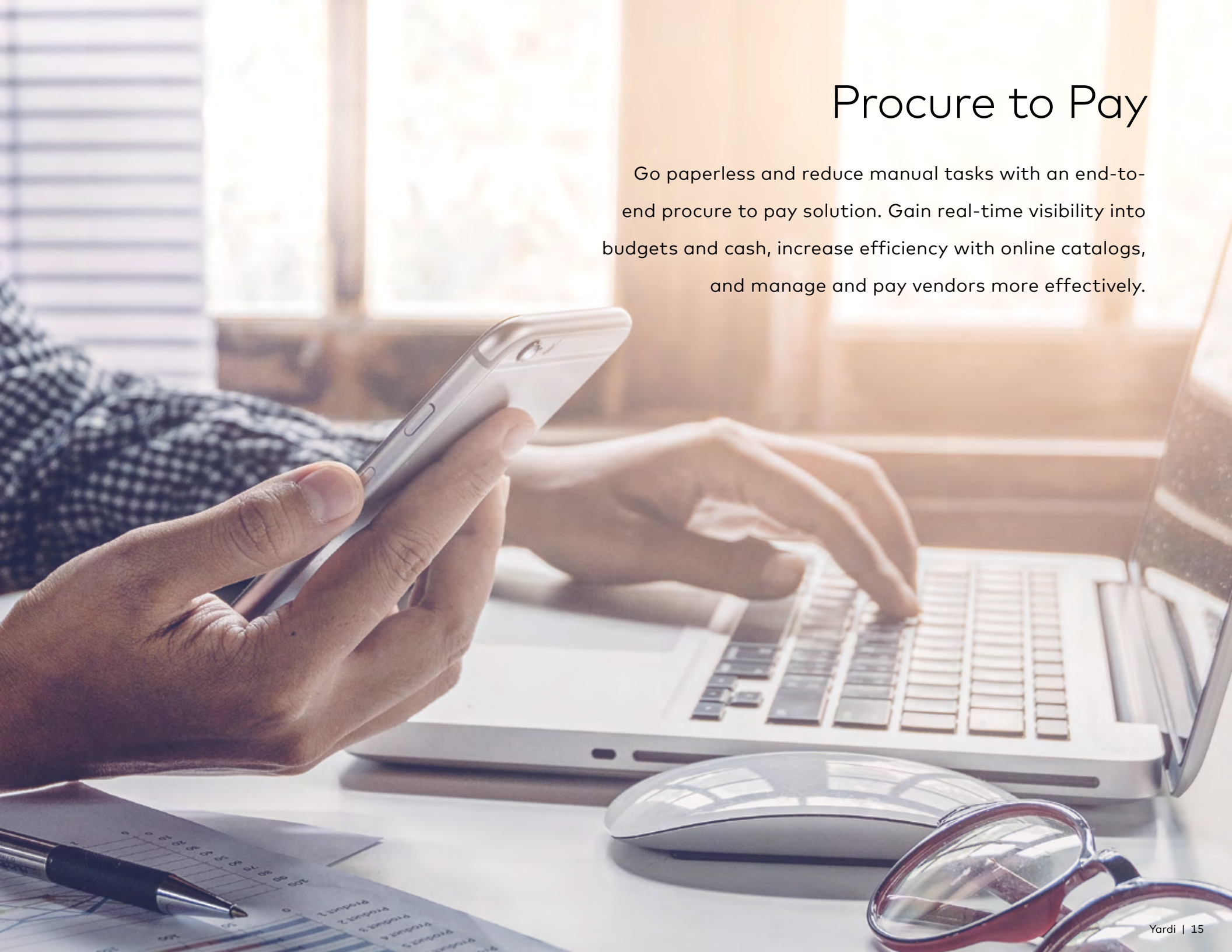
- Saves money by consolidating procurement spend into one platform
- Enables better decision-making with real-time Voyager data
- Provides powerful analytics to support continuous process improvement
- Increases efficiency and productivity with online and mobile workflows
- Eliminates interfacing with third-party systems
- Saves time and drastically reduces scanning, keying, printing and other manual tasks
- Gives vendors real-time transparency into their business with you
- Identifies potential at-risk vendors and develops strategies for managing them





# Procure to Pay

Go paperless and reduce manual tasks with an end-to-end procure to pay solution. Gain real-time visibility into budgets and cash, increase efficiency with online catalogs, and manage and pay vendors more effectively.



# Yardi Procure to Pay

Gain efficiency and productivity across the procure to pay process while attaining real-time transparency into your budgets and cash flow. The end-to-end Yardi Procure to Pay platform includes powerful vendor management tools, flexible purchasing catalogs, electronic processing and approvals for purchase orders and invoices, and seamless outsourced vendor payments.

## Paperless Invoice Processing

Yardi PAYscan is a paperless, mobile-enabled invoice workflow platform that provides a 360-degree view of transactions from check to payable to invoice to purchase order, work order, job or contract. In addition, all budget and cash data is available in real-time. Use powerful analytics to drive continuous improvement across your procure to pay process.

## Full-Service or Email Invoice Processing

Reduce costs and increase efficiency even further with Yardi PAYscan Full Service or Yardi PAYscan Email Processing. With Full Service, Yardi provides a dedicated PO Box and email address for vendors to submit invoices. With Email Processing, vendors email the invoice directly to Yardi and we enter the data into Voyager for you. All invoices show in Voyager as invoice registers, ready for you to review, approve and process as payables.





## Online Procurement\*

Yardi Marketplace is an online and mobile MRO shopping platform. Manage suppliers and leverage contracted pricing in one platform with off-the-shelf supplier relationships and catalogs, or create your own online catalogs. Yardi Marketplace works seamlessly with PAYscan to process invoices electronically. Get insightful reporting that gives you full control of your organization's procurement activity.

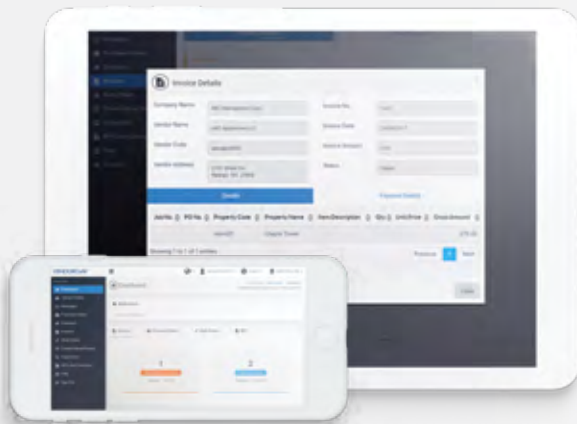


## Key Features

- Centralized and powerful procurement platform
- Full audit trail capabilities to enforce compliance
- Open invoice monitoring and real-time view of cash
- SKU-level reporting to identify potential savings
- Electronic invoicing with Yardi Marketplace and VENDORCafé
- Full-service invoice importing and data entry to eliminate self-scanning
- Invoice matching to POs, contracts, WOs and jobs
- Simple management of W-9, COI, service contracts and other documents
- Integrated mobile app for online invoice approvals and review

## Vendor Management

Empower your vendors to manage their business with you through the VENDORCafé online and mobile portal. Vendors can submit invoices and view invoice status, payment details, purchase orders and work orders in real time. Invoices submitted electronically through VENDORCafé import immediately into PAYscan. VendorShield simplifies management of Form W-9s, certificates of insurance, service contracts and other documents.



## Simplified Bill Payments\*

Speed up the vendor payment process with Yardi Bill Pay. Invoices are seamlessly routed through your approval workflows. Bill Pay automatically pulls payments from your Voyager database and fulfills them based on how you pay each vendor. Vendors receive payment via your choice of mailed check, ACH or credit card.

\*Not currently available in Canada

## Key Benefits

- Ensures fewer equipment breakdowns with preventative maintenance scheduling
- Enables fast response to maintenance requests with mobile access
- Facilitates oversight of maintenance personnel with location tracker
- Features graphical display of key performance indicators
- Includes maintenance, inspection and fixed assets modules





A man with a beard and short dark hair, wearing a blue button-down work shirt, is looking down at a tablet computer he is holding with both hands. He is standing in a warehouse or industrial setting, with blue metal shelving units and various items in the background. The lighting is warm and focused on the man.

# Maintenance Management

Schedule, track and manage all preventative, routine and emergency maintenance from your desktop or mobile device –and gain modules for managing inspections and fixed assets at no extra cost.

# Yardi Advanced Maintenance

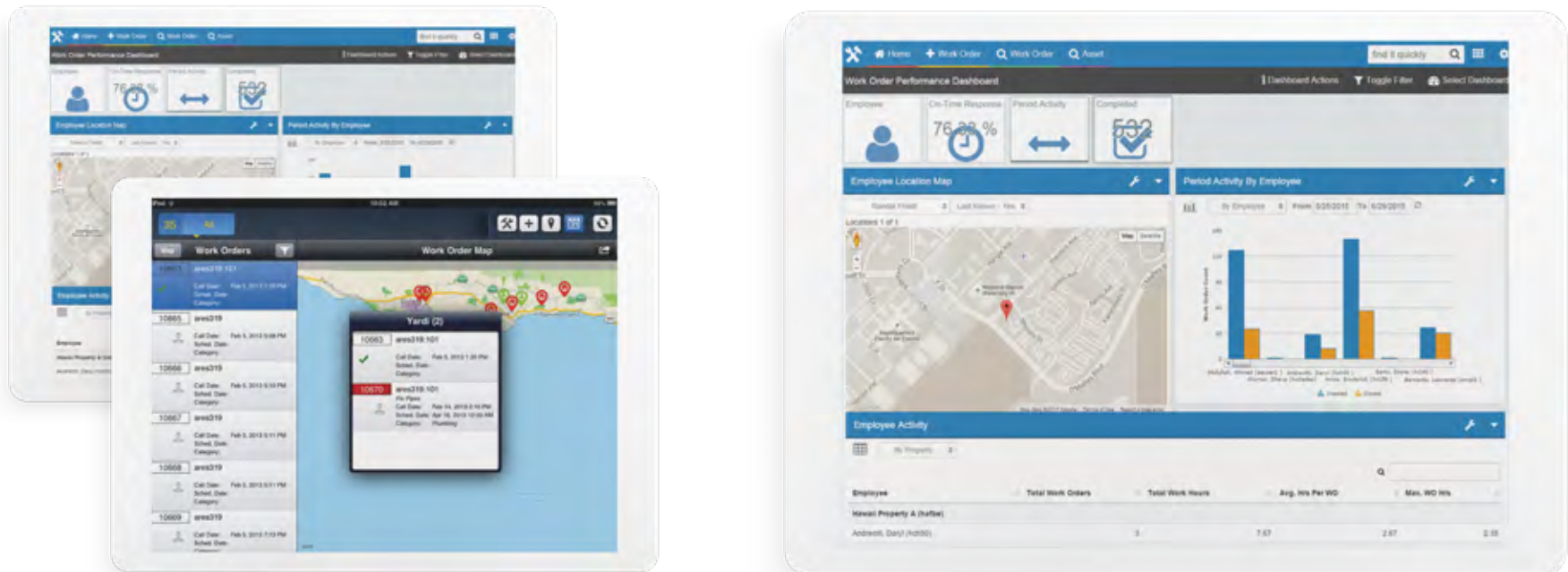
Yardi Advanced Maintenance is your solution for complete scheduling, tracking and management of asset maintenance from your desktop or mobile device. The solution supports all types of real estate market segments including, but not limited to, multifamily, subsidized, senior, military, condominium, HOA, retail, office and industrial properties. You can schedule preventative, routine and emergency maintenance tasks. A location tracking feature allows you to match technicians with tasks, ensuring rapid response to emergency requests.

## Maintenance Manager Mobile

Yardi Advanced Maintenance includes the Yardi Maintenance Manager Mobile app which helps you save time, boost efficiency and increase tenant and resident satisfaction by taking your maintenance workflow mobile. Maintenance managers can easily track technicians, assign work orders and manage their maintenance tasks from an Android™ Tablet or iPad®.

## Facilities Management

Stay informed about your properties' maintenance operations via intuitive, customizable dashboards. A guided workflow simplifies and expedites the work order creation process. Key performance indicators help you assess work order response and completion, employee activity, and material usage. Also, the solution integrates with VENDORCafé to allow you to request and manage vendor proposals from your tablet.







With Advanced Maintenance, you receive additional products for managing assets at no extra cost, including:

## Yardi Maintenance

Perform and track daily maintenance for your properties with unparalleled ease and efficiency.

## Yardi Inspection

Schedule, perform and manage all types of inspections including annual, regulatory, due diligence and more.

## Yardi Fixed Assets

Record and monitor fixed assets from purchase order issuance through purchase, use and final disposition.

## Key Features

- Full planning and scheduling of maintenance tasks
- Complete history of work orders
- Fewer equipment breakdowns with preventative maintenance scheduling
- Complete history of all fixed assets
- Fast response to maintenance requests with mobile access
- Oversight of maintenance personnel with location tracker
- Graphical display of key performance indicators









Modernize your  
association



## **YARDI** | Energized for Tomorrow

At Yardi our mission is to provide our clients with superior products and outstanding customer service, while we take care of our employees and the communities where we work and live. With that commitment, Yardi leads the industry in providing full business software solutions for real estate investment management, property management, financial accounting, asset management and ancillary services. Organizations like yours have been using our proven and mature software with confidence for decades.

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