GENERAL

yardi genesis user manual

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Introduction

In today's fast-paced real estate environment, property managers and accounting professionals demand a robust, flexible platform that can handle everything from leasing and maintenance to financial reporting and compliance. **Yardi Genesis**has emerged as a leading cloud based solution that delivers a unified, end to end experience for multifamily, commercial, and mixed use portfolios. However, the true power of Genesis lies in how effectively its users can navigate its features, configure workflows, and generate insights.

Whether you're a new administrator setting up the system for the first time or an experienced user looking to deepen your knowledge, this **Yardi Genesis user manual**provides a comprehensive, step by step guide. It covers everything from initial installation and configuration to advanced customization, troubleshooting, and best practices. By following this manual, you'll be able to unlock the full potential of Yardi Genesis and streamline your day to day operations.

Let's dive into the world of Yardi Genesis and discover how this powerful platform can transform your property management and accounting workflows.

What Is Yardi Genesis?

Yardi Genesis is a cloud native, modular platform that brings together property management, accounting, resident services, and analytics in a single, intuitive interface. Built on a microservices architecture, Genesis offers:

- Scalable performance that grows with your portfolio.
- Seamless integration with third party applications via RESTful APIs.
- Real time data synchronization across all modules.
- A mobile first design that empowers users on the go.

The platform is designed to reduce manual data entry, eliminate silos, and provide actionable insights that help asset owners, property managers, and residents make informed decisions.

Getting Started With Yardi Genesis

System Requirements

Genesis is a cloud hosted solution, so there are no on premise hardware requirements. To use the platform effectively, ensure that your users meet the following minimum specifications:

- Supported web browsers: Google Chrome (latest), Mozilla Firefox (latest), Microsoft Edge (latest), Safari (latest).
- Internet connection: Broadband (minimum 10 /Mbps download, 1 /Mbps upload) for optimal performance.
- Screen resolution: 1280 /× /720 or higher for full functionality.

Installation Steps

Since Genesis is a SaaS solution, the installation process is largely handled by Yardi. However, as a system administrator you'll need to:

1. Register for a Genesis account with your organization's details.
2. Complete the initial setup wizard that guides you through adding your first property and configuring basic settings.
3. Invite users via email and assign appropriate roles.
4. Configure security settings such as multi‑factor authentication and IP whitelisting.

Initial Setup and Configuration

Once the account is live, the first step is to tailor the system to your organization's needs:

- Define your chart of accounts in the Accounting module to ensure accurate financial reporting.
- Set up property profiles that include units, lease types, and amenities.
- Configure vendor relationships and establish maintenance workflows.
- Customize the dashboard layout to highlight key metrics such as occupancy, rent roll, and maintenance tickets.
- Enable mobile access for on‑site staff and residents.

Understanding the Yardi Genesis Interface

Dashboard Overview

The Genesis dashboard serves as the command center for all activities. It displays real‑time widgets for:

- Occupancy rates and vacancy trends.
- Financial snapshots – rent collection, expenses, and cash flow.
- Maintenance ticket status and SLA compliance.
- Upcoming lease expirations and renewal opportunities.

Navigation Menus

Genesis employs a sidebar navigation menu that groups features into logical categories:

- Property Management – Manage units, leases, and residents.
- Accounting & Finance – Create journals, reconcile accounts, and run reports.
- Vendor & Maintenance – Issue work orders, track vendor performance.
- Reports – Access pre‑built or custom dashboards.
- Administration – User roles, permissions, and system settings.

Customizing Your Workspace

Users can personalize their experience by:

- Rearranging widgets on the dashboard.
- Creating favorite views for frequently accessed reports.
- Setting up email alerts for critical events.
- Adjusting display preferences such as date formats and currency symbols.

Core Functionalities of Yardi Genesis

Property Management

- Unit and Lease Administration – Add, edit, and archive units; manage lease terms, rent escalations, and renewal options.
- Resident Lifecycle – From application to move‑in, including background checks and credit scoring.
- Integration with online payment portals for rent collection.
- Automated rent reminders and late fee calculations.

Accounting & Finance

- Full double entry accounting with support for multiple currencies.
- Automated journal entries from lease and vendor transactions.
- Advanced reconciliation tools to match bank statements.
- Compliance with GAAP, IFRS, and local regulations.

Resident & Tenant Management

- Resident portal for online bill payment, maintenance requests, and lease documents.
- Resident communication tools, including bulk email and SMS.
- Resident satisfaction surveys and analytics.
- Data export for tenant background checks and credit reports.

Vendor & Maintenance Management

- Vendor onboarding and contract management.
- Work order creation, assignment, and tracking.
- Service Level Agreement (SLA) monitoring and reporting.
- Cost analysis and vendor performance dashboards.

Reporting & Analytics

- Pre built financial reports: P&L, balance sheet, cash flow.
- Customizable dashboards with drag and drop widgets.
- Advanced analytics using embedded BI tools.
- Export options to Excel, PDF, or API endpoints.

Detailed User Guide

Creating and Managing Properties

To add a new property:

1. Navigate to Property Management > Properties.
2. Click Add Property and fill in basic details: name, address, property type, and contact information.
3. Define unit types (studio, 1 bedroom, etc.) and assign units to the property.
4. Set up lease templates that reflect your organization’s standard terms.
5. Save and review the property in the property list.

Setting Up Accounts and Chart of Accounts

Accurate accounting starts with a well structured chart of accounts:

1. Go to Accounting & Finance > Chart of Accounts.
2. Use the Import Wizard to load a template or create accounts manually.
3. Assign account groups such as Revenue, Expense, Assets, and Liabilities.
4. Link accounts to specific properties or portfolios for segmented reporting.
5. Validate the chart by running a trial balance report.

Resident Onboarding Process

Genesis streamlines the resident lifecycle:

1. Prospective residents submit an application through the online portal.
2. The system performs background checks and credit scoring automatically.
3. Once approved, the resident is assigned a lease and unit.

4. Electronic lease documents are generated and signed via e signature.
5. Rent and security deposit payments are collected through the portal.
6. Move in inspections and resident hand offs are logged in the system.

Vendor and Work Order Management

Efficient maintenance is critical for tenant satisfaction:

1. Create a vendor profile with contact details and service scope.
2. Issue a work order specifying the issue, priority, and due date.
3. Assign the order to an internal team or external vendor.
4. Track progress via status updates and time stamps.
5. Approve vendor invoices and release payment automatically.
6. Generate a maintenance report for cost analysis.

Generating Reports

Genesis offers a rich set of reporting

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