

Yardi Relay Race – Yardi for Maintenance

Facilitators: Mike Schenk (SM), Jason Rash (OV), Mary Williams (CO)

Mission Statement = In this session we will present the most efficient use of Yardi for maintenance supervisors for Work Orders and Purchase Orders. We will demonstrate how using the mobile app can reduce time running back and forth to the office/shop and how using Recurring Purchase Orders can cut time entering POs for monthly orders.

Ice Breaker (15 minutes) = We print out the Yes/No questions on strips of paper and place them in a container. We ask each person to introduce themselves and select a Yes/No question and read it out loud. We'll arrange the class members so they are facing each other in order to see as many of the others replies as possible.

➤ **Mobile Maintenance App (30 minutes):**

- Logging into the app - use
- Landing Page:
- Sync - Sync - Sync: After all activity
- My Work Orders vs Unassigned:
 - Assign can only be done from Voyager
- Add New Work Order - great to use when receive an emergency call or if stopped while out on site and resident has a request
 - property must be selected
 - created as unassigned
- Picking up unassigned work orders
 - Sort By
 - Search
- Once start date/time are added to the Labor Details on the work order, it is removed from the Unassigned into My Work Orders
 - green check mark indicates work order has been synced
- Update Work order - adding Photos using +, can add text
- Closing out work orders - Edit and Complete and Sync
- Syncing the app
- Leaving paper copy behind - alternatives
 - use generic paper of second page
 - preprinted small card that contains a QR code for leaving reviews
- Report emailed nightly to managers/supervisors to review WO's closed the prior day

➤ Purchase Orders (**20 minutes**):

- PO's - include unit numbers to be used for tracking
- Unapprove PO's - Restart Approval Workflow (Available to PM)
- Capital PO ordering separate from operations
- Ordering templates - Shopping List - Recurring PO's

➤ Open Discussion (**10 minutes**):

- Ask them to share
 - techniques they use to increase efficiency
 - Supervisors – have some examples here to help start the conversation.