



Workflows can make or break your level of efficiency within Yardi systems. When your workflow is optimized, you can streamline invoices, payables, work orders, leasing, vendor setup, and more. But when your workflow experiences regular delays and complications, things can quickly go off-track and leave your office less efficient than it was before.

Understanding Workflows

“Workflows are designed to streamline and simplify the approval process,” says Meagan Stuesser, a Yardi consultant at Saxony Partners. “They can be automated to help users complete critical businesses tasks more quickly. Anytime a P.O., I.R., or Payable is created with that expense type, it will automatically attach the associated workflow and show up in the workflow dashboard for the first user in that workflow process.”

Benefits Of Optimized Workflows

The benefits of an effective Yardi workflow are numerous:

- Having your workflows through Yardi gives you visibility of every step in the process
- All users can see where in the approval process items are
- Users can be held accountable for any delays in the process.
- Audits are easier, as you can see the process from start to finish
- Quicker turnaround times for payments, repairs, leasing

“Saxony can review your current workflow designs and determine whether they should be streamlined, simplified, or completely overhauled to make your process more efficient,” Stuesser said. “We will make recommendations on which roles should be involved in which workflow to ensure a smooth process.”

Tips For Maximizing Workflows



DON'T RELY ON EMAIL

Keep workflows inside the Yardi system and out of your email inbox. It's risky to use emails for approvals. Emails can be accidentally deleted, resulting in delays or misunderstandings.



DON'T OVER-COMPLICATE IT

Avoid unnecessary steps when setting up your workflows, which can complicate the process. The order in which the approval steps occur is crucial. Make sure that the correct user roles are set up in the most efficient order.



CHOOSE ROLES WISELY

Workflows are meant to hold users accountable for their part in internal processes. Make sure you have assigned the appropriate users to each workflow. And make sure that users included in the approval process have an understanding of that process.



UPDATE ROLES ACCORDINGLY

When staffing changes take place with your organization, the role settings within Yardi workflows can easily slip through the cracks. Have a plan to update user roles periodically as needed.



CHECK DASHBOARD DAILY

Even if workflow roles are assigned perfectly, tasks can bottleneck if the process is ignored by key users. Check dashboards first thing in the morning, at least once during the day, and prior to logging off.