YieldStar®

Reports

User Guide

Contents

Running Reports

◉ Reports

The **Reports** page lets you perform several types of system tasks. This page provides fields that let you select a report to generate, and then choose available options that customize the report to show the information you need. After you generate a report, it is available for download in the report type's *Previously run reports* section.
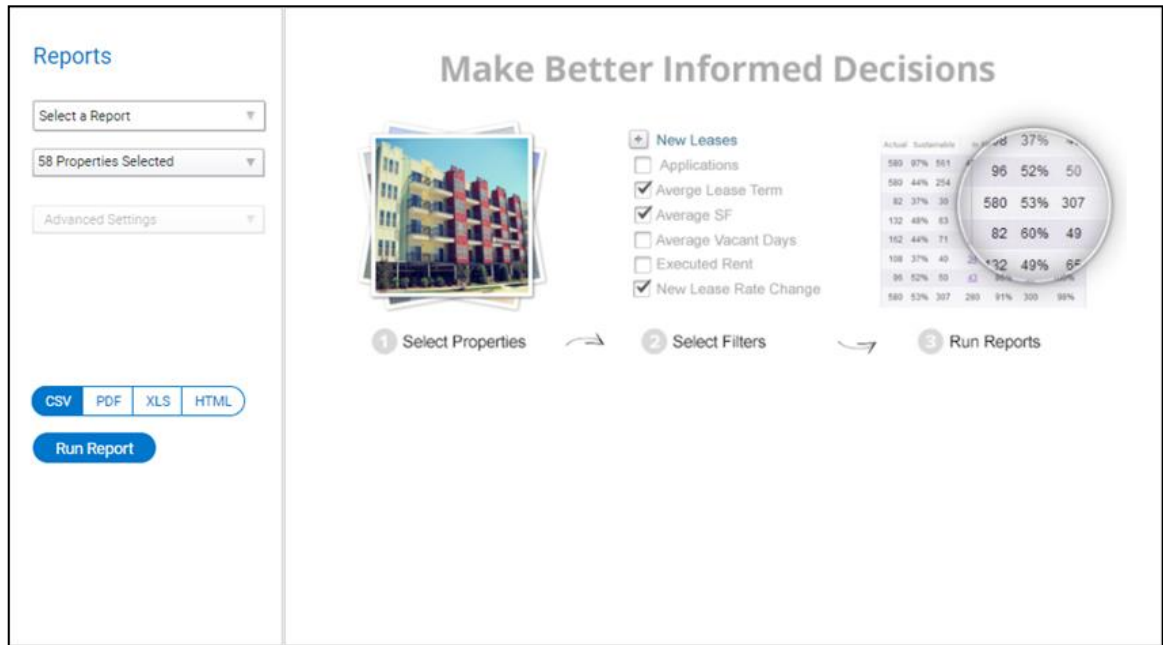
Generating Reports

To generate reports:

1. Use the **Report** drop-down list to select the report to create. The options for the report appear on the page.
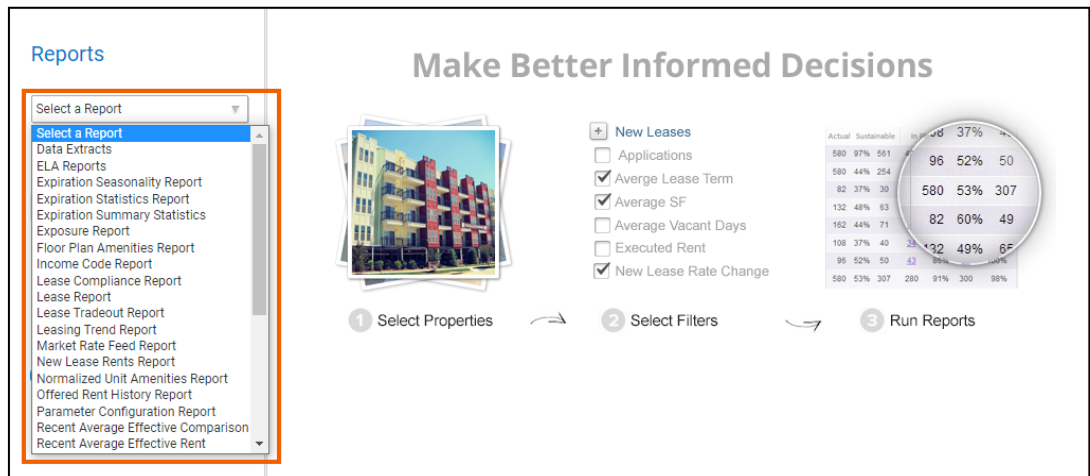
2.	If available, use the **Property** drop-down list to select the check boxes for the properties that you want to include in the report.

YieldStar maintains your selected properties for all of the pages in the application. Any properties that you selected before you opened the **Reports** page remain selected on the **Reports** page, and any properties that you select on the **Reports** page are also selected for all of the pages in the application.
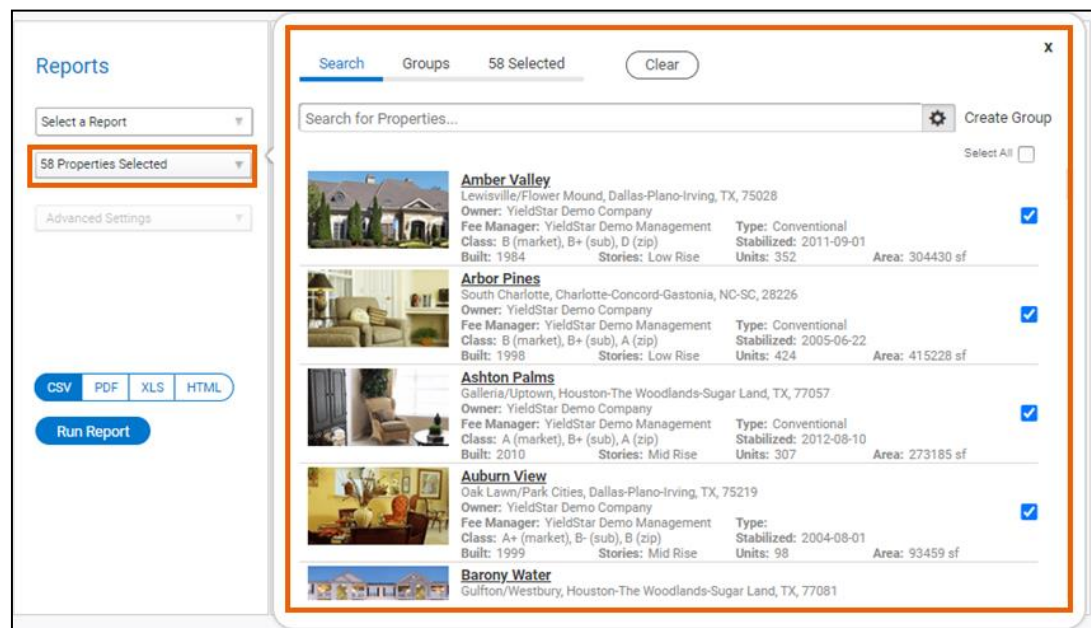
3.	If available, use the **Select Metrics** drop-down list to select the check boxes for the metrics to include in the report.

> *Metrics are available for ELA reports only. Refer to the ELA Report Options (on page 29) for additional information on the available metrics.*

4.	Use the **Advanced Settings** drop-down list to select the options to include in the report.

The options available are based on the selected report. Refer to the options topic for the report you are generating for additional information on the available options.
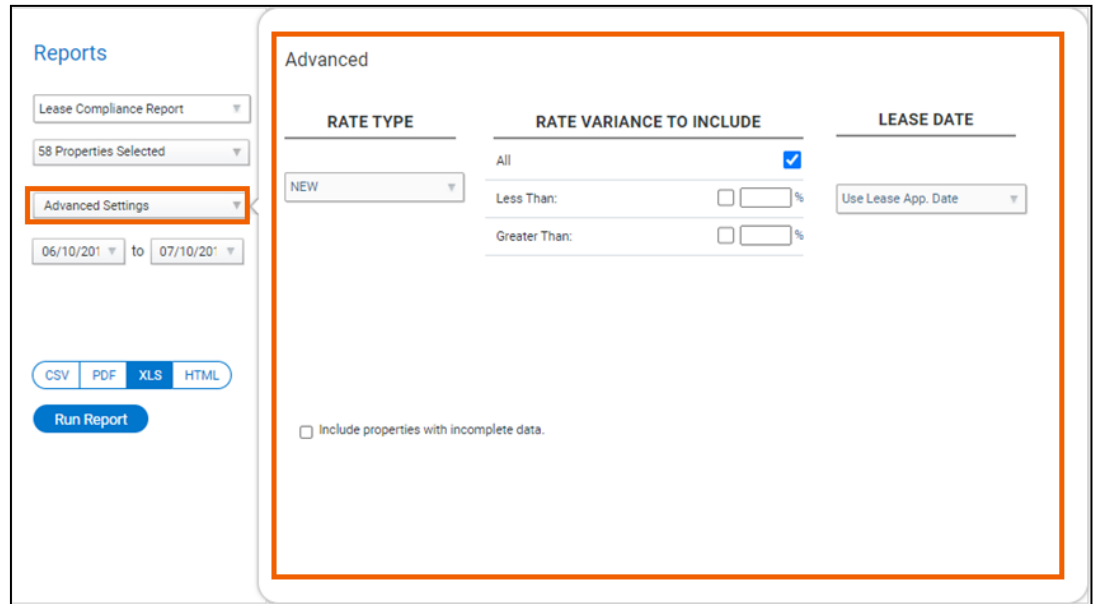
5. Use the **Start Date** drop-down list to select the year and month to begin the report data.

6. If available, use the **End Date** drop-down list to select the year and the month to end the report data.
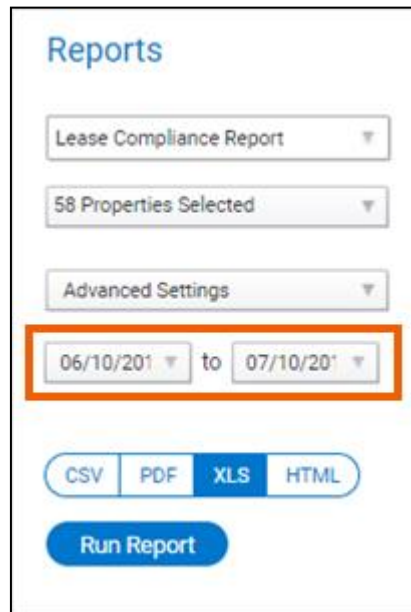
7. Click the file type in the **Format** field. The available file types depend on which report you selected.

8. Click the **Run Report** button. The report appears in the *Previously Run Reports* section with a Pending status. When the report is ready to view, the ⤓ **Download** button appears.

    A warning message opens for the *Lease Compliance* report and *Lease Trade Out* report when there are properties with incomplete data. If a warning message opens, click **OK** to close the warning message, and then use the **Advanced Settings** drop-down list to select the **Include Properties with Incomplete Data** check box.

Downloading Reports

To download reports:

1. Locate the report to download in the *Previously Run Reports* section.

2.   Click the ⬇ **Download** button in the report's row.

3.   If prompted to open or save, select the option you want.

4.   Complete any additional steps required by your Internet browser. The report opens.

Fields

Reports

|	
Report	Use the drop-down list to select the report to create.
Property	Use the drop-down list to select the check boxes for the properties that you want to include in your report.
	YieldStar maintains your selected properties for all of the pages in the application. Any properties that you selected before you opened the Reports page remain selected on the Reports page, and any properties that you select on the Reports page are also selected for all of the pages in the application.
Select Metrics	Use the drop-down list to select each metric to include in your report.
	This field is available for the ELA reports.
Advanced Settings	Use the drop-down list to select each setting to apply to your report.

Start Date   Use the drop-down list to select the year and month to begin the report data.

End Date   Use the drop-down list to select the year and the month to end the report data.

Format   Click the file type to create. You can choose from:

- **CSV:** This option produces the report as a CSV file.
- **PDF:** This option produces the report as a PDF file.
- **XLS:** This option produces the report as an XLS file.
- **HTML:** This option produces the report as an HTML file.

Previously Run Reports

Report #   This is the report number you can use to locate your report.

Date/Time   This is the date and time that the report ran.

Buttons

Run Report   Creates a report based on the selected options

± Download   Downloads a copy of the report to the computer

New Lease Rents

🥧 Reports ➜ Report ➜ New Lease Rents Report

You can create the *New Lease Rents* report on the **Reports** page. Use the *New Lease Rents* report to generate the recommended matrix of rent for units at a selected property. The generated report includes the current offered rents in a list with move-in dates and terms. It includes the amenities for each unit. Leasing agents can use this report on a daily basis to price units after the property completes rent acceptance in YieldStar. You can run this report ad hoc for one property at a time, or schedule the report to run for multiple properties.

The report name, property name, selected floor plans, and current date appear at the top of the report. Depending on your selected options, the report shows either one unit per page or multiple units per page. The report groups the data by the floor plan and unit. You can find the effective or offer rent for each floor plan and unit based on lease term and move-in date. The lease terms and rent types available in the report correlate to the options you choose when you create the report.

Laurel Springs
Floor Plan: All
Sep 1, 2020 11:11:46 AM

1B1B* : 1B1B		Unit: N/A - 1017			UnitType: A1				1 Bedroom, 1 Bathroom (519 Sq. Ft.)					
Immediate					Amenities: 1st Floor, Plank Flooring, Upgrade, Upgraded Blinds									
					Move In Dates									

Term	Rent Type	01Sep	02Sep	03Sep	04Sep	05Sep	06Sep	07Sep	08Sep	09Sep	10Sep	11Sep	12Sep	13Sep	14Sep	15Sep
3	Offered Rent	$1,477	$1,488	$1,512	$1,524	$1,535	$1,547	$1,559	$1,570	$1,582	$1,594	$1,605	$1,617	$1,629	$1,640	$1,652
3	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
3	Effective Rent	$1,477	$1,488	$1,512	$1,524	$1,535	$1,547	$1,559	$1,570	$1,582	$1,594	$1,605	$1,617	$1,629	$1,640	$1,652
4	Offered Rent	$1,269	$1,278	$1,286	$1,295	$1,304	$1,313	$1,321	$1,330	$1,339	$1,348	$1,356	$1,365	$1,374	$1,383	$1,391
4	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
4	Effective Rent	$1,269	$1,278	$1,286	$1,295	$1,304	$1,313	$1,321	$1,330	$1,339	$1,348	$1,356	$1,365	$1,374	$1,383	$1,391
5	Offered Rent	$1,215	$1,222	$1,229	$1,236	$1,243	$1,250	$1,257	$1,264	$1,271	$1,278	$1,285	$1,292	$1,299	$1,306	$1,313
5	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
5	Effective Rent	$1,215	$1,222	$1,229	$1,236	$1,243	$1,250	$1,257	$1,264	$1,271	$1,278	$1,285	$1,292	$1,299	$1,306	$1,313
6	Offered Rent	$1,173	$1,179	$1,185	$1,190	$1,196	$1,202	$1,208	$1,214	$1,220	$1,225	$1,231	$1,237	$1,243	$1,249	$1,255
6	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
6	Effective Rent	$1,173	$1,179	$1,185	$1,190	$1,196	$1,202	$1,208	$1,214	$1,220	$1,225	$1,231	$1,237	$1,243	$1,249	$1,255
7	Offered Rent	$1,138	$1,143	$1,148	$1,153	$1,158	$1,163	$1,168	$1,173	$1,178	$1,183	$1,188	$1,193	$1,198	$1,203	$1,208
7	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
7	Effective Rent	$1,138	$1,143	$1,148	$1,153	$1,158	$1,163	$1,168	$1,173	$1,178	$1,183	$1,188	$1,193	$1,198	$1,203	$1,208
8	Offered Rent	$1,103	$1,112	$1,117	$1,121	$1,126	$1,130	$1,134	$1,139	$1,143	$1,147	$1,152	$1,156	$1,161	$1,165	$1,169
8	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
8	Effective Rent	$1,103	$1,112	$1,117	$1,121	$1,126	$1,130	$1,134	$1,139	$1,143	$1,147	$1,152	$1,156	$1,161	$1,165	$1,169
9	Offered Rent	$1,088	$1,092	$1,096	$1,100	$1,104	$1,107	$1,111	$1,115	$1,119	$1,123	$1,127	$1,131	$1,135	$1,139	$1,142
9	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
9	Effective Rent	$1,088	$1,092	$1,096	$1,100	$1,104	$1,107	$1,111	$1,115	$1,119	$1,123	$1,127	$1,131	$1,135	$1,139	$1,142
10	Offered Rent	$1,079	$1,083	$1,086	$1,090	$1,093	$1,143	$1,146	$1,150	$1,153	$1,157	$1,160	$1,164	$1,167	$1,171	$1,174
10	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
10	Effective Rent	$1,079	$1,083	$1,086	$1,090	$1,093	$1,143	$1,146	$1,150	$1,153	$1,157	$1,160	$1,164	$1,167	$1,171	$1,174
11	Offered Rent	$1,114	$1,117	$1,120	$1,124	$1,127	$1,130	$1,133	$1,136	$1,139	$1,143	$1,146	$1,149	$1,152	$1,155	$1,159
11	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
11	Effective Rent	$1,114	$1,117	$1,120	$1,124	$1,127	$1,130	$1,133	$1,136	$1,139	$1,143	$1,146	$1,149	$1,152	$1,155	$1,159
12	Offered Rent	$1,104	$1,119	$1,122	$1,125	$1,128	$1,131	$1,134	$1,136	$1,139	$1,142	$1,145	$1,148	$1,151	$1,154	$1,157
12	Concession	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
12	Effective Rent	$1,104	$1,119	$1,122	$1,125	$1,128	$1,131	$1,134	$1,136	$1,139	$1,142	$1,145	$1,148	$1,151	$1,154	$1,157

New Lease Rents Options

Report Options

- **Report Selector:** Use the drop-down list to select the report that you want to create.

- **Property Picker:** Use the drop-down list to select or change the properties that you want to include in the report.

  - **Search:** Click the link to search for, select, or remove the properties included in the report.

    - **Search for Properties:** Type the information that you want to find in this field. To filter the properties shown, click the ⚙ **Filter Selection** button, select the check box of each filter that you want to apply, and then click the **Close** button.

    - **Create Group:** Click the link to create a group from the currently selected properties.

    - **(Property Details):** Click the name of the property to open the **Property Details** page, where you can view additional information about the property.

    - **Select All:** Select the check box to include all of the properties in your portfolio.

    - **(Select):** Select the check box for the individual property to include it in the report, or clear the check box to exclude it from the report.

  - **Groups:** Click this link to search for and select groups of properties.

    - **Name:** Type the name of the group that you want to locate in this field.

    - **Owner:** Type the owner of the shared group that you want to locate in this field.

    - **(Select):** Select the check box of the group to include the group of properties in the report, or clear the check box to exclude the group of properties from the report.

    - **(Delete):** Click the ⊖ **Delete** button to delete the group.

      You can delete the groups that you created.

  - **Selected:** Click this link to view the properties selected for the report.

    - **(Delete):** Click the ⊖ **Delete** button to remove the property from the report.

- **Advanced Settings:** Click the link to select the desired rate, minimum lease term, and maximum lease term. To close the **Advanced Settings** box, click the link again.

  - **Desired Rate Display:** Use the drop-down list to select the rent type to include in the report.

    - **Effective Rent:** Select this option to include only the effective rent in the report. The effective rent includes unit-specific amenities and is the net of any applicable concessions or specials.

    - **Offered Rent:** Select this option to include only the offered rent in the report. The offered rent includes the actual rent in the lease offer.

    - **All:** Select this option to include both the effective rent and the offered rent in the report.

  - **Minimum Lease Term:** Type the minimum lease term (in months) to include in the report. The lowest maximum lease term is 0

- **Maximum Lease Term:** Type the maximum lease term (in months) to include in the report. The highest maximum lease term is 99.
- **No. of Units per Page:** Use the drop-down list to select whether the report includes one or multiple units per page. The number of units per page defaults to one.

Export Options

- **Format:** Select the file type to create. These formats are available:
    - **CSV:** To produce the report as a CSV file, select this option.
    - **PDF:** To produce the report as a PDF file, select this option.
    - **XLS:** To produce the report as an XLS file, select this option.
    - **HTML:** To produce the report online, select this option.

New Lease Rents Columns

This information appears on the *New Lease Rents* report:

- **Property Name**: This is the name of the property. This is a column in CSV files and a heading in PDF files.
- **Date/Time:** This is the date and time that the system generated the report. This is a heading in PDF files.
- **Floor Plan:** This is the name and description of the floor plan.
- **Unit:** This is the building number and unit number.
- **Unit Type:** This is the unit type, identified from the Property Management System (PMS).
- **(Bedroom/Bathroom/Sq Ft):** This is the number of bedrooms and bathrooms in the units. It also provides the square footage of the unit. This is a column in PDF, XLS, and HTML files.
- **Status:** This is the first date that your property has the unit available for rent.
- **Amenities:** This is the amenities available for the unit.
- **Term:** This is the length of the term in months.
- **Rent Type:** This indicates whether the rent shown is the effective rent or the offered rent.
- **Move-In Dates:** This shows the new lease rent for the unit based on different move-in dates. This is a column in PDF, XLS, and HTML files.
- **Move-In Date:** This is the date that the applicant intends to move-in to the unit. This is a column in CSV files only.
- **Value:** This is the new lease rent for the unit based on different move-in dates. This is a column in CSV files only.

Buttons

Run Report	Creates a report based on the selected options
⬇ Download	Downloads a copy of the report to the computer

Rent Summary Report

You can create the *Rent Summary* report on the **Reports** page. After you select the *Rent Summary* report from the **Reports** drop-down list, you can select the properties and advanced settings to include in the report. The generated report can contain two separate sections, the *Portfolio Rent Summary* section and the *Summary of Current Rent* section.

Portfolio Rent Summary

The *Portfolio Rent Summary* section shows the rent range for each bedroom and bathroom count combination across all of your selected communities. In addition to the rent range, the report includes the:

- Property count
- Number of bedrooms and bathrooms
- Average square footage
- Number of available units
- Total units

The number of included communities and the effective dates of the prices appear at the top of this section. The report only includes the *Portfolio rent summary* section if you select the **Include Portfolio Summary** option in **Advanced Settings**.

Portfolio Rent Summary - Available Floor Plans

58 Communities

Prices Effective Sep 1, 2020 3:11:08 PM

Property Count	Bedrooms	Bathrooms	Avg. Sq. Ft	Monthly Effective Rent	Available Units	Total Units
1	0	0	1,735	$0 - $0	9	9
2	0	1	611	$1,063 - $4,002	4	48
58	1	1	785	$725 - $5,963	655	8693
1	1.5	1	1,020	$1,275 - $2,596	3	16
14	2	1	995	$1,062 - $4,570	50	514
57	2	2	1,129	$863 - $8,980	550	6375
28	3	2	1,373	$1,212 - $9,467	51	813
1	3	2.5	1,512	$1,848 - $1,903	0	10
5	3	3	1,469	$1,409 - $7,642	11	97
1	4	4	1,206	$1,700 - $1,886	2	1

Summary of Current Rent

The *Rent Summary* report has a separate *Summary of Current Rent* section for each of your selected communities. The *Summary of Current Rent* section shows the rent range of the community for all of your current filters. In addition to the rent range, the report includes the:

- Unit type
- Number of bedrooms and bathrooms
- Average square footage
- Number of available units

The property's name, address, contact information (if available), and the effective dates of the prices appear at the top of this section.

Summary of Current Rent - Available Floor Plans

Laurel Springs
51838 Main St.
Plano, TX, 75024

Prices Effective Sep 1, 2020 3:11:08 PM

Floor Plan	Unit Type	Bedrooms	Bathrooms	Avg. Sq. Ft	Monthly Effective Rent	Available Units
1B1B-A123*	A1	1	1	700	$1,032 - $3,271	5
1B1B-A123*	A2	1	1	771	$1,032 - $3,622	5
1B1B-A123*	A3	1	1	843	$1,037 - $3,099	4
1B1B-A4	A4	1	1	949	$1,140 - $3,741	3
2B2B-B12*	B1	2	2	978	$1,400 - $4,138	3
2B2B-B12*	B2	2	2	1,083	$1,394 - $5,342	12
3B2B-C1	C1	3	2	1,345	$2,071 - $6,922	3

Rent Summary Report Options

Report Options

- **Report Selector:** Use the drop-down list to select the report that you want to create.
- **Property Picker:** Use the drop-down list to select or change the properties that you want to include in the report.
  - **Search:** Click the link to search for, select, or remove the properties included in the report.
    - **Search for Properties:** Type the information that you want to find in this field. To filter the properties shown, click the ⚙ **Filter Selection** button, select the check box of each filter that you want to apply, and then click the **Close** button.
    - **Create Group:** Click the link to create a group from the currently selected properties.

- • **(Property Details):** Click the name of the property to open the **Property Details** page, where you can view additional information about the property.

  - • **Select All:** Select the check box to include all of the properties in your portfolio.

  - • **(Select):** Select the check box for the individual property to include it in the report, or clear the check box to exclude it from the report.

- • **Groups:** Click this link to search for and select groups of properties.

  - • **Name:** Type the name of the group that you want to locate in this field.

  - • **Owner:** Type the owner of the shared group that you want to locate in this field.

  - • **(Select):** Select the check box of the group to include the group of properties in the report, or clear the check box to exclude the group of properties from the report.

  - • **(Delete):** Click the ⊖ **Delete** button to delete the group.

  You can delete the groups that you created.

- • **Selected:** Click this link to view the properties selected for the report.

  - • **(Delete):** Click the ⊖ **Delete** button to remove the property from the report.

- • **Advanced Settings:** Click the link to select the options to include in the report. To close the **Advanced Settings** box, click the link again.

  - • **Options:** Select whether to include or exclude the *Portfolio summary* section in the *Rent Summary* report.

    - • **Include Portfolio Summary:** Select or clear the check box to include or exclude the *Portfolio summary* section in the *Rent Summary* report.

Export Options

- • **Format:** Select the file type to create. These formats are available:

  - • **CSV:** To produce the report as a CSV file, select this option.

  - • **PDF:** To produce the report as a PDF file, select this option.

  - • **XLS:** To produce the report as an XLS file, select this option.

  - • **HTML:** To produce the report online, select this option.

Rent Summary Report Columns

The *Rent Summary* report can include two sections, depending on your selections in **Advanced settings**. This section provides descriptions of the columns available in each section.

When you generate a CSV file, the report includes the columns for only one of these sections. If you include the portfolio summary, then the report includes the Portfolio Rent Summary columns. If you exclude the portfolio summary, then the report includes the Summary of Current Rent columns.

Portfolio Rent Summary – Available Floor Plans

Information appears in the *Portfolio Rent Summary – Available Floor Plans* section of the *Rent Summary* report in these columns:

- **Property Count:** This is the total count of properties that have units with the indicated bedroom and bathroom count.
- **Bedrooms:** This is the number of bedrooms in the units.
- **Bathrooms:** This is the number of bathrooms in the units.
- **Avg Sq Ft:** This is the average square feet across every unit summarized in the report with the correlating bedroom and bathroom count.
- **Monthly Effective Rent:** This is the range, from low to high, of the monthly effective rents at every property for units with the correlating bedroom and bathroom count.
- **Available Units:** This is the total number of available units at every property with the correlating bedroom and bathroom count.
- **Total Units:** This is the total number of units at every property with the correlating bedroom and bathroom count.

Summary of Current Rent – Available Floor Plans

Information appears in the *Summary of Current Rent – Available Floor Plans* section of the *Rent Summary* report in these columns:

- **Property Name**: This is the name of the property. This column appears for CSV files only.
- **Floor Plan:** This is the name of the floor plan group.
- **Unit Type:** This is the name of the unit type, identified from the Property Management System (PMS).
- **Bedrooms:** This is the number of bedrooms in units of this floor plan type.
- **Bathrooms:** This is the number of bathrooms in units of this floor plan type.
- **Avg Sq Ft:** This is the average square footage for units of this floor plan type.
- **Monthly Effective Rent:** This is the range, from low to high, of the monthly effective rents for the currently available units.
- **Available Units:** This is the number of units available for this floor plan type.

Buttons

Run Report	Creates a report based on the selected options
⬇ Download	Downloads a copy of the report to the computer

Unit Availability Report

⚫ Reports ➜ Report ➜ Unit Availability Report

You can create the *Unit Availability* report on the **Reports** page. After you select the *Unit Availability* report from the **Reports** drop-down list, you can select the properties and advanced settings to include in the report.

The *Unit Availability* report lists units that are available for leasing as of the current property date and those that will become available in the future. The report name and the selected options appear at the top of the report. Unit information follows, with the units grouped by either bed count or floor plan. For each unit listed, this report shows the:

- Unit number
- Square footage
- Features (amenities)
- Condition
- Vacancy date
- Date available
- Term
- Monthly effective rate

Displaying the best price (term and monthly effective rent) is optional.

Unit Availability Report: Laurel Springs
Group By: Bed Count
Exclude Best Price
Sep 01, 2020

Floor Plan	Unit Number	Sq Ft	Features	Condition	Vacated	Date Available	Term	Monthly Effective Rent
Unit Type: A1								
1B1B-A123*	N/A-1418	700	Fireplace, Upgraded Flooring, Scenic View, Upgraded Unit, Washer & Dryer, First Floor	Vacant	10/25/19	Immediate	12	$1,135
1B1B-A123*	N/A-0712	700	Fireplace, Upgraded Flooring, Upgraded Unit, First Floor	On Notice		10/30/20	12	$1,072
1B1B-A123*	N/A-0811	700	Fireplace, Upgraded Flooring, Upgraded Unit, First Floor	On Notice		10/30/20	12	$1,072
1B1B-A123*	N/A-1422	700	Fireplace, Upgraded Flooring, 2nd Floor, Upgraded Unit	On Notice		10/31/20	12	$1,037
1B1B-A123*	N/A-1217	700	Fireplace, Upgraded Flooring, Upgraded Unit, First Floor	On Notice		11/13/20	12	$1,072
Unit Type: A2								
1B1B-A123*	N/A-1712	771	Fireplace, Handicap, Upgraded Flooring, Upgraded Unit, First Floor	Vacant	3/27/20	Immediate	12	$1,075
1B1B-A123*	N/A-0312	771	Fireplace, Upgraded Flooring, Upgraded Unit, Washer & Dryer, First Floor	Vacant	8/21/20	9/4/20	12	$1,122
1B1B-A123*	N/A-1812	771	Fireplace, Upgraded Flooring, Upgraded Unit, Washer & Dryer, First Floor	On Notice		9/19/20	12	$1,122
1B1B-A123*	N/A-1113	771	Fireplace, Garage Premium, Upgraded Flooring, Upgraded Unit, Washer & Dryer, First Floor	On Notice		10/30/20	12	$1,182
1B1B-A123*	N/A-1132	771	Fireplace, Upgraded Flooring, 2nd Floor, Upgraded Unit	On Notice		11/13/20	12	$1,037
Unit Type: A3								
1B1B-A123*	N/A-1611	843	Fireplace, Upgraded Flooring, Upgraded Unit, First Floor	Vacant	8/25/20	9/8/20	12	$1,072
1B1B-A123*	N/A-0429	843	Fireplace, Upgraded Flooring, 2nd Floor, Upgraded Unit	On Notice		9/26/20	12	$1,037
1B1B-A123*	N/A-0419	843	Fireplace, Upgraded Flooring, Upgraded Unit, First Floor	On Notice		10/3/20	12	$1,072
1B1B-A123*	N/A-0511	843	Fireplace, Upgraded Flooring, Upgraded Unit, Washer & Dryer, First Floor	On Notice		10/23/20	12	$1,122

Unit Availability Report Options

Report Options

- **Report Selector:** Use the drop-down list to select the report that you want to create.
- **Property Picker:** Use the drop-down list to select or change the properties that you want to include in the report.
  - **Search:** Click the link to search for, select, or remove the properties included in the report.
    - **Search for Properties:** Type the information that you want to find in this field. To filter the properties shown, click the ⚙ **Filter Selection** button, select the check box of each filter that you want to apply, and then click the **Close** button.
    - **Create Group:** Click the link to create a group from the currently selected properties.
    - **(Property Details):** Click the name of the property to open the **Property Details** page, where you can view additional information about the property.
    - **Select All:** Select the check box to include all of the properties in your portfolio.
    - **(Select):** Select the check box for the individual property to include it in the report, or clear the check box to exclude it from the report.
  - **Groups:** Click this link to search for and select groups of properties.
    - **Name:** Type the name of the group that you want to locate in this field.
    - **Owner:** Type the owner of the shared group that you want to locate in this field.
    - **(Select):** Select the check box of the group to include the group of properties in the report, or clear the check box to exclude the group of properties from the report.
    - **(Delete):** Click the ⊖ **Delete** button to delete the group.

      You can delete the groups that you created.

  - **Selected:** Click this link to view the properties selected for the report.
    - **(Delete):** Click the ⊖ **Delete** button to remove the property from the report.
- **Advanced Settings:** Click the link to select how to organize the report data and what options to include in the report. To close the **Advanced Settings** box, click the link again.
  - **Group By:** Use the drop-down list to select how to organize the data in the report. You can choose to organize report data by bed count or by the YieldStar floor plan. By default, the report is organized by bed count.
  - **Options:** Select whether to include or exclude the best price and non-forecasting floor plans in the report.
    - **Include Best Price:** Select or clear the check box to include or exclude the best price and term in the report.

- **Include Non-Forecasting Floor Plans:** Select or clear the check box to include or exclude non-forecasting floor plans in the report.

Export Options

- **Format:** Select the file type to create. These formats are available:

    - **CSV:** To produce the report as a CSV file, select this option.

    - **PDF:** To produce the report as a PDF file, select this option.

    - **XLS:** To produce the report as an XLS file, select this option.

    - **HTML:** To produce the report online, select this option.

Unit Availability Report Columns

Information appears on the *Unit Availability* report in these columns:

- **Property Name:** This is the name of the property. This column appears for CSV files only.

- **Floor Plan:** This is the name of the floor plan.

- **Unit Number:** This is the building number and the unit number for the unit from the Property Management System (PMS).

- **Sq Ft:** This is the actual square footage of the unit.

- **Features:** This is a list of the amenities for the unit.

- **Condition:** This is the availability status of the unit (*On Notice* or V*acant*).

- **Vacated:** This is the availability status of the unit (*On Notice* or V*acant*). If no date appears, then the resident is still occupying the unit.

- **Date Available:** This is the date a new resident can occupy the unit. The system calculates this date by adding the number of turn days (defined in setup) to either the expected move-out date or the actual move-out date.

- **Term:** This is the lease term associated with the unit.

- **Monthly Effective Rent:** This is the 12-month effective rent (market rent less concessions) for the unit. This amount includes unit-specific amenities and square footage adjustments.

- **Best Price – Term:** This is the lease term associated with the best price from the Lease Term Rent Matrix. This column appears if you select the **Include Best Price** option on the **Advanced Settings** page.

- **Best Price – Monthly Effective Rent:** This is the effective monthly rent associated with the best price term and move-in period for the unit. This column appears if you select the **Include Best Price** option on the **Advanced Settings** page.

These group fields appear in rows under the columns, depending on your selections on the **Advanced Settings** page:

- **Floor Plan:** This is the YieldStar floor plan. This field appears if you choose to group by the YieldStar floor plan.

- **Unit Type:** This is the name of the unit type, identified from the PMS.

Buttons

Run Report   Creates a report based on the selected options

⬇ **Download**   Downloads a copy of the report to the computer

Expiration Summary Statistics Report

 Reports ➔ Report ➔ Expiration Summary Statistics

You can create the *Expiration Summary Statistics* report on the **Reports** page. Use the *Expiration Summary Statistics* report to compare your lease expirations to your thresholds over the next eighteen months. You can create the *Expiration Summary Statistics* report on the **Reports** page. After you select the **Expiration Summary Statistics** option from the **Reports** drop-down list, you can then select the properties and advanced settings to include in the report.

For each property you listed, you can view the bed count, number of units, expiration type, expiration date (month and year), number of expirations, and percentage of expirations. If you generate the report at the unit type level, the report breaks out the expiration values by unit type.

There are two variations of the *Expiration Summary Statistics* report, which are based on whether the report is at the bedroom level or the unit type level.

Expiration Summary Statistics Report for the Bedroom Level

The *Expiration Summary Statistics* report for the bedroom level includes the statistics by bed count, units, and type. It excludes the statistics for the unit types.

Expiration Summary Statistics Report

Laurel Springs
51838 Main St. - 75024
Aug 31, 2020 11:41:42 AM

Bed	Units	Type	2020 Aug	2020 Sep	2020 Oct	2020 Nov	2020 Dec	2021 Jan	2021 Feb	2021 Mar	2021 Apr	2021 May	2021 Jun	2021 Jul	2021 Aug	2021 Sep	2021 Oct	2021 Nov	2021 Dec	2022 Jan
1	194	Threshold	19 9.8%	17 8.8%	16 8.2%	15 7.7%	15 7.7%	16 8.2%	16 8.2%	17 8.8%	17 8.8%	20 10.3%	19 9.8%	20 10.3%	19 9.8%	17 8.8%	16 8.2%	15 7.7%	15 7.7%	16 8.2%
		Scheduled	16 8.2%	21 10.8%	23 11.9%	11 5.7%	15 7.7%	11 5.7%	17 8.8%	14 7.2%	14 7.2%	17 8.8%	5 2.6%	15 7.7%	16 8.2%	15 7.7%	8 4.1%	1 0.5%	2 1.0%	0 0.0%
2	116	Threshold	11 9.5%	10 8.6%	9 7.8%	9 7.8%	9 7.8%	10 8.6%	10 8.6%	11 9.5%	9 7.8%	12 10.3%	13 11.2%	12 10.3%	11 9.5%	10 8.6%	9 7.8%	9 7.8%	9 7.8%	10 8.6%
		Scheduled	10 8.6%	18 15.5%	13 11.2%	2 1.7%	7 6.0%	10 8.6%	12 10.3%	12 10.3%	3 2.6%	7 6.0%	7 6.0%	11 9.5%	5 4.3%	6 5.2%	7 6.0%	1 0.9%	2 1.7%	2 1.7%
3	32	Threshold	3 9.4%	3 9.4%	2 6.3%	2 6.3%	2 6.3%	3 9.4%	3 9.4%	3 9.4%	3 9.4%	3 9.4%	4 12.5%	3 9.4%	3 9.4%	3 9.4%	2 6.3%	2 6.3%	2 6.3%	3 9.4%
		Scheduled	4 12.5%	4 12.5%	1 3.1%	1 3.1%	4 12.5%	1 3.1%	4 12.5%	3 9.4%	0 0.0%	2 6.3%	1 3.1%	4 12.5%	2 6.3%	2 6.3%	2 6.3%	0 0.0%	0 0.0%	1 3.1%
Totals	342	Threshold	33 9.6%	30 8.8%	27 7.9%	26 7.6%	26 7.6%	29 8.5%	29 8.5%	31 9.1%	29 8.5%	35 10.2%	36 10.5%	35 10.2%	33 9.6%	30 8.8%	27 7.9%	26 7.6%	26 7.6%	29 8.5%
		Scheduled	30 8.8%	43 12.6%	37 10.8%	14 4.1%	26 7.6%	22 6.4%	33 9.6%	29 8.5%	17 5.0%	26 7.6%	13 3.8%	30 8.8%	23 6.7%	23 6.7%	17 5.0%	2 0.6%	4 1.2%	3 0.9%

Expiration Summary Statistics Report for the Unit Type Level

The *Expiration Summary Statistics* report for the unit type level includes the statistics by bed count, units, and type. It includes the statistics for the unit types beneath the statistics for the bedroom level.

Expiration Summary Statistics Report

Laurel Springs
51838 Main St. - 75024
Aug 31, 2020 11:42:52 AM

Bed	Units	Type	2020					2021												2022
			Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
1	194	Threshold	19 9.8%	17 8.8%	16 8.2%	15 7.7%	15 7.7%	16 8.2%	16 8.2%	17 8.8%	17 8.8%	20 10.3%	20 10.3%	19 9.8%	17 8.8%	16 8.2%	15 7.7%	15 7.7%	16 8.2%	16 8.2%
		Scheduled	16 8.2%	21 10.8%	23 11.9%	11 5.7%	15 7.7%	11 5.7%	17 8.8%	14 7.2%	14 7.2%	17 8.8%	5 2.6%	15 7.7%	16 8.2%	15 7.7%	8 4.1%	1 0.5%	2 1.0%	0 0.0%
		A1	4	7	7	1	4	3	5	3	3	3	0	4	3	4	1	0	1	0
		A2	7	4	7	4	5	6	7	4	4	6	1	7	8	1	1	0	1	0
		A3	2	6	5	3	5	1	3	3	3	5	3	2	1	1	1	1	0	0
		A4	3	4	4	3	1	1	2	4	4	3	1	2	4	2	2	0	0	0
2	116	Threshold	11 9.5%	10 8.6%	9 7.8%	9 7.8%	9 7.8%	10 8.6%	10 8.6%	11 9.5%	9 7.8%	12 10.3%	13 11.2%	12 10.3%	11 9.5%	10 8.6%	9 7.8%	9 7.8%	9 7.8%	10 8.6%
		Scheduled	10 8.6%	18 15.5%	13 11.2%	2 1.7%	7 6.0%	10 8.6%	12 10.3%	12 10.3%	3 2.6%	7 6.0%	7 6.0%	11 9.5%	5 4.3%	6 5.2%	7 6.0%	1 0.9%	2 1.7%	2 1.7%
		B1	5	7	6	1	2	6	7	5	1	3	4	8	2	2	3	0	2	2
		B2	5	11	7	1	5	4	5	7	0	4	3	3	3	3	2	1	0	0
3	32	Threshold	3 9.4%	3 9.4%	2 6.3%	2 6.3%	2 6.3%	3 9.4%	3 9.4%	3 9.4%	3 9.4%	3 9.4%	4 12.5%	3 9.4%	3 9.4%	3 9.4%	2 6.3%	2 6.3%	2 6.3%	3 9.4%
		Scheduled	4 12.5%	4 12.5%	1 3.1%	1 3.1%	4 12.5%	1 3.1%	4 12.5%	3 9.4%	0 0.0%	2 6.3%	1 3.1%	4 12.5%	2 6.3%	2 6.3%	2 6.3%	0 0.0%	0 0.0%	1 3.1%
		C1	4	4	1	1	4	1	4	2	0	2	1	4	2	1	2	0	0	1
Totals	342	Threshold	33 9.6%	30 8.8%	27 7.9%	26 7.6%	26 7.6%	29 8.5%	29 8.5%	31 9.1%	29 8.5%	35 10.2%	36 10.5%	35 10.2%	33 9.6%	30 8.8%	27 7.9%	26 7.6%	26 7.6%	29 8.5%
		Scheduled	30 8.8%	43 12.6%	37 10.8%	14 4.1%	26 7.6%	22 6.4%	33 9.6%	29 8.5%	17 5.0%	26 7.6%	13 3.8%	30 8.8%	23 6.7%	23 6.7%	17 5.0%	2 0.6%	4 1.2%	3 0.9%
	342	A1	4	7	7	1	4	3	5	3	3	3	0	4	3	4	1	0	1	0
		A2	7	4	7	4	5	6	7	4	4	6	1	7	8	1	1	0	1	0
		A3	2	6	5	3	5	1	3	3	3	5	3	2	1	1	1	1	0	0
		A4	3	4	4	3	1	1	2	4	4	3	1	2	4	2	2	0	0	0
		B1	5	7	6	1	2	6	7	5	1	3	4	8	2	2	3	0	2	2
		B2	5	11	7	1	5	4	5	7	0	4	3	3	3	3	2	1	0	0
		C1	4	4	1	1	4	1	4	2	0	2	1	4	2	1	2	0	0	1

Expiration Summary Statistics Report Options

Report Options

- **Report Selector:** Use the drop-down list to select the report that you want to create.
- **Property Picker:** Use the drop-down list to select or change the properties that you want to include in the report.
    - **Search:** Click the link to search for, select, or remove the properties included in the report.
        - **Search for Properties:** Type the information that you want to find in this field. To filter the properties shown, click the ⚙ **Filter Selection** button, select the check box of each filter that you want to apply, and then click the **Close** button.
        - **Create Group:** Click the link to create a group from the currently selected properties.
        - **(Property Details):** Click the name of the property to open the **Property Details** page, where you can view additional information about the property.
        - **Select All:** Select the check box to include all of the properties in your portfolio.
        - **(Select):** Select the check box for the individual property to include it in the report, or clear the check box to exclude it from the report.

- **Groups:** Click this link to search for and select groups of properties.
  - **Name:** Type the name of the group that you want to locate in this field.
  - **Owner:** Type the owner of the shared group that you want to locate in this field.
  - **(Select):** Select the check box of the group to include the group of properties in the report, or clear the check box to exclude the group of properties from the report.
  - **(Delete):** Click the ⊖ **Delete** button to delete the group.

  You can delete the groups that you created.

  - **Selected:** Click this link to view the properties selected for the report.
    - **(Delete):** Click the ⊖ **Delete** button to remove the property from the report.
- **Advanced Settings:** Click this link to select the advanced settings on which to base the report data. To close the **Advanced Settings** box, click the link again.
  - **Level:** Use the drop-down list to select the level (bedroom or unit type) at which the report presents the statistics.

Export Options

- **Format:** Select the file type to create. These formats are available:
  - **CSV:** To produce the report as a CSV file, select this option.
  - **PDF:** To produce the report as a PDF file, select this option.
  - **XLS:** To produce the report as an XLS file, select this option.
  - **HTML:** To produce the report online, select this option.

Expiration Summary Statistics Report Columns

Information appears in the *Expiration Summary Statistics* report in these columns:

- **Property:** This is the name of the property.
- **Address:** This is the address of the property.
- **Bed Count:** This is the number of bedrooms in the unit.
- **Units:** This is the number of units in the bed group.
- **Type:** This is the expiration type (scheduled or threshold) occurring at the indicated month and year.
  - **Scheduled:** The expirations are for leases scheduled to expire during the indicated month and year.
  - **Threshold:** The expirations are for leases expected to expire during the indicated month and year based on the property's history.

If you selected Unit Type in the Advanced settings options, this column includes the unit types with the correlating scheduled and threshold values for each unit type.

- **Year:** This is the year to which the system applies the statistics. The system automatically sets up three years in the future to catch all possible leases that might ever occur.
- **Month:** This is the month to which the system applies the statistics.
- **Lease Expiration:** This is the number of lease expirations during the indicated month and year.
- **Expiration Percentage:** This is the percentage of units with lease expirations during the indicated month and year.

Buttons

Run Report	Creates a report based on the selected options
⬇ Download	Downloads a copy of the report to the computer

Lease Compliance Report

◑ Reports ➜ Report ➜ Lease Compliance Report

You can create the *Lease Compliance* report on the **Reports** page. After you select the *Lease Compliance* report from the **Reports** list, you can then select the properties, metrics, advanced settings, and date range to include in the report.

The name of the report, the rate type, the lease date, and the rent variance appear at the top of the report. Each property included in the report lists leases by floor plan. For each floor plan listed, the report shows the:

- Unit type
- Square footage
- Building
- Unit
- Transaction type
- Lease details
- Unit premium or discount
- Scheduled rent
- Actual rent
- Rent variance

Subtotals and grand totals are available for the lease details type, the scheduled rent, actual rent, and rent variance. In the subtotal, total, and grand total, the variance percent is the monthly variance as a percentage of the scheduled effective rent.

For OneSite users, this report compares the quoted rent selected at the time of application to the actual lease rent and concessions in scheduled billing.

For non-OneSite users, the rate shown in the **Scheduled** column is the rate that was in effect on the day the applicant leased. Since quotes guarantee a price for a client-defined time frame, the rates in the scheduled column can naturally vary from the rate in the actual column. The rates in the **Actual** and **Scheduled** columns match if the person leases the unit on the first visit.

In this report, YieldStar considers a lease compliant when there is no variance between the scheduled rent and the actual lease rent. The actual lease rent is the effective rent, as calculated in YieldStar.

This report does not show any YieldStar generated rent values stored before July 18, 2007. This does not affect the actual signed historical lease values.

Lease Compliance Report
From: 6/10/16 To: 7/10/16
Desired Rate Type: ALL Lease Date: Lease Start Date
Rent Variance to Include: ALL
Aug 31, 2020 12:52:10 PM

Unit Type	Square Footage	Building	Unit	Trans Type	Lease Details					Unit Prem/Disc	Scheduled			Actual			Variance		
					Type	App Date	Start	End	Term		Rent	Conc	Eff Rent	Rent	Conc	Eff Rent	Monthly	Extended	Percent
Laurel Springs																			
Floor Plan:		1B1B-A123*		Units:	158														
A2	771	N/A	1113	New		8/22/08	6/14/16	7/16/17	13	$180	$1,096	$0	$1,096	$1,096	$0	$1,096	$0	$0	-
A3	843	N/A	0732	New		5/26/16	6/30/16	8/1/17	13	$180	$1,265	$0	$1,265	$1,265	$0	$1,265	$0	$0	-
A3	843	N/A	0511	New		6/10/16	6/13/16	7/6/17	13	$120	$1,157	$0	$1,157	$1,157	$0	$1,157	$0	$0	-
A3	843	N/A	1232	New		6/11/16	6/11/16	5/30/17	12	$180	$1,169	$0	$1,169	$1,169	$0	$1,169	$0	$0	-
A2	771	N/A	0415	New		6/11/16	6/30/16	7/26/17	13	$180	$1,080	$0	$1,080	$1,080	$0	$1,080	$0	$0	-
A3	843	N/A	0419	New		6/11/16	6/23/16	6/22/17	12	$120	$1,216	$0	$1,216	$1,216	$0	$1,216	$0	$0	-
A3	843	N/A	1421	New		6/17/16	6/30/16	8/1/17	13	$120	$1,100	$0	$1,100	$1,100	$200	$1,085	($15)	($195)	(1.0%)
A1	700	N/A	0722	New		6/17/16	6/20/16	7/15/17	13	$130	$1,000	$0	$1,000	$1,000	$0	$1,000	$0	$0	-
A3	843	N/A	0411	New	Corporate	6/30/16	7/8/16	1/7/17	6	$120	$1,339	$0	$1,339	$1,135	$0	$1,135	($204)	($1,224)	(15.0%)
A3	843	N/A	0232	New	Corporate	7/5/16	7/8/16	1/8/17	6	$180	$1,235	$0	$1,235	$1,199	$0	$1,199	($36)	($216)	(3.0%)
A3	843	N/A	1611	New		7/6/16	7/7/16	8/1/17	13	$120	$1,020	$0	$1,020	$1,020	$0	$1,020	$0	$0	-
Subtotal:					**11**						$12,677	$0	$12,677	$12,437	$200	$12,422	($255)	($1,635)	(2.0%)
A2	771	N/A	1812	Renewal		3/10/16	6/13/16	6/8/17	12	$85	$981	$0	$981	$981	$0	$981	$0	$0	-
A2	771	N/A	0614	Renewal		3/15/16	6/26/16	6/21/17	12	$180	$1,052	$0	$1,052	$1,052	$0	$1,052	$0	$0	-
A2	771	N/A	1922	Renewal		3/21/16	6/21/16	6/16/17	12	$95	$1,001	$0	$1,001	$1,001	$0	$1,001	$0	$0	-
A2	771	N/A	1726	Renewal		3/28/16	6/14/16	3/11/17	9	$95	$1,011	$0	$1,011	$1,011	$0	$1,011	$0	$0	-
A3	843	N/A	1018	Renewal		4/4/16	7/6/16	7/1/17	12	$120	$1,166	$0	$1,166	$1,166	$0	$1,166	$0	$0	-
A3	843	N/A	0532	Renewal		4/4/16	7/8/16	7/10/17	12	$145	$1,192	$0	$1,192	$1,192	$0	$1,192	$0	$0	-
Subtotal:					**6**						$6,403	$0	$6,403	$6,403	$0	$6,403	$0	$0	0.0%

Lease Compliance Report Options

Report Options

- **Report Selector:** Use the drop-down list to select the report that you want to create.
- **Property Picker:** Use the drop-down list to select or change the properties that you want to include in the report.
    - **Search:** Click the link to search for, select, or remove the properties included in the report.
        - **Search for Properties:** Type the information that you want to find in this field. To filter the properties shown, click the ⚙ **Filter Selection** button, select the check box of each filter that you want to apply, and then click the **Close** button.
        - **Create Group:** Click the link to create a group from the currently selected properties.
        - **(Property Details):** Click the name of the property to open the **Property Details** page, where you can view additional information about the property.
        - **Select All:** Select the check box to include all of the properties in your portfolio.
        - **(Select):** Select the check box for the individual property to include it in the report, or clear the check box to exclude it from the report.
    - **Groups:** Click this link to search for and select groups of properties.
        - **Name:** Type the name of the group that you want to locate in this field.
        - **Owner:** Type the owner of the shared group that you want to locate in this field.
        - **(Select):** Select the check box of the group to include the group of properties in the report, or clear the check box to exclude the group of properties from the report.

- **(Delete):** Click the ⊖ **Delete** button to delete the group.

  > *You can delete the groups that you created.*

- **Selected:** Click this link to view the properties selected for the report.
  - **(Delete):** Click the ⊖ **Delete** button to remove the property from the report.
- **Advanced Settings:** Click this link to select advanced settings such as rate types, variances to include, and lease dates on which to base the report data. To close the **Advanced Settings** box, click the link again.
  - **Rate Type:** Use the drop-down list to select the lease type (new, renewal, or all) to include in the report.
  - **Rate Variance to Include:** Select the variances to include in the report.
    - **All:** Select the check box to include all rate variances on the report, or clear the check box to include only some of the rate variances. If you select either the **Less Than** or **Greater Than** check boxes, the application clears this field.
    - **Less Than:** Select the check box to include rate variances below a specified rate, then type the rate that the variances should be below.
    - **Greater Than:** Select the check box to include rate variances above a specified rate, then type the rate that the variances should be above.
  - **Lease Date:** Use the drop-down list to select the lease date for the report. Choose either the lease start date or the lease application date.
  - **Include Properties with Incomplete Data:** Select or clear the check box to include or exclude properties with incomplete data.
- **Start Date:** Select a beginning date for reporting lease compliance metrics.
- **End Date:** Select an end date for reporting lease compliance metrics.

Export Options

- **Format:** Select the file type to create. These formats are available:
  - **CSV:** To produce the report as a CSV file, select this option.
  - **PDF:** To produce the report as a PDF file, select this option.
  - **XLS:** To produce the report as an XLS file, select this option.
  - **HTML:** To produce the report online, select this option.

Lease Compliance Report Columns

Information appears in the *Lease Compliance* report in these columns:

- **Property Name**: This is the name of the property. This is a column in CSV files only.
- **Unit Type:** This is the unit type, identified from the Property Management System (PMS).
- **Square Footage:** This is the square footage of the units.
- **Building:** This is the building number for the unit. It is available if it is used in the PMS.

- **Unit:** This is the unit number.
- **Trans Type:** This is the rate type generated by YieldStar that is included in the report (new or renewal).
- **Lease Details:** These are the metrics for the leases included in the report.
    - **Type:** This is the lease type (new or renewal) of the current lease for the unit.
    - **App Date:** For new leases, this is the date that the resident applied for the unit. For renewals, the app date is the date that the resident signed the lease.
    - **Start:** This is the date that the lease starts.
    - **End:** This is the date that the lease ends.
    - **Term:** This is the lease term for the current actual lease.
- **Unit Prem/Disc:** This is the total amount of the amenities assigned to the unit at the time we first receive the data.
- **Scheduled:** These are the scheduled rents, concessions, and effective rents.
    - **Rent:** For non-OneSite users, rent is the YieldStar gross rent for the unit at the time of the lease application. For OneSite users, this rent is the quoted rent. The value of the rent includes unit-specific amenities.
    - **Conc:** This is the total value of any concessions (one-time discounts, recurrent discounts) offered at the time of the lease application. This value represents the total value of the concessions, whether the discount took place immediately or was amortized over the life of the lease.
    - **Eff Rent:** This is the YieldStar-calculated effective rent for the unit at the time of the lease application for non-OneSite users or the quote for OneSite users. This value includes unit-specific amenities and is the net of any applicable concessions or specials.
- **Actual:** These are the actual rents, concessions, and effective rents.
    - **Rent:** This is the unit's actual gross rent for the actual lease. This value includes unit-specific amenities.
    - **Conc:** This is the total value of any concessions (rent discounts, recurrent discounts) for the unit for the actual lease. This value represents the total value of the concession, whether the resident took the discount immediately or amortized it over the life of the lease.
    - **Eff Rent:** This is the actual effective rent for the unit for the actual lease. This value includes unit-specific amenities and is the net of any applicable concessions or specials.
- **Variance:** These are the variances between the scheduled effective rent for the unit and the actual effective rent for the unit.
    - **Monthly**: This is the monthly variance between the scheduled effective rent for the unit and the actual effective rent for the unit.

- **Extended:** This is the total variance between the scheduled effective rent for the unit and the actual effective rent for the unit. This variance is calculated as:

  Monthly Variance × Lease Term

- **Percent:** This is the percent variance between the scheduled effective rent for the unit and the actual effective rent for the unit.

Buttons

Run Report	Creates a report based on the selected options
⬇ **Download**	Downloads a copy of the report to the computer

Glossary of Terms

A

Amenity

An amenity is a feature or characteristic of a property, a floor plan, or a unit. Unit amenities are separate from the physical floor plan or room layout of the unit and often indicate the way a unit was finished out. That is, having two bedrooms is not an amenity, while having hardwood floors is. Floor plan amenities apply to every unit within a particular floor plan. Property amenities are those features of the property that are available to all residents, such as a pool or security access gates.

Application

An application is the form a person who wants to live at a property must complete.

Availability

Availability refers to the floor plans or units that are available for leasing. Availability is determined for a specific date and includes units that will be vacant and made ready by that date.

Available Units

This is the total number of units available to lease as of the post date.

B

Base Rent Adjustments

Base rent adjustments are longer standing adjustments that you can use to account for differentiating characteristics among unit types within a particular floor plan. If you use the amenity normalization feature, base rent

adjustments are normalized across a floor plan. Do NOT use base rent adjustments if the unit amenities in the PMS already capture the differentiating factors.

Batch

A batch is a group of leases that expire within a specific date range. The renewal batch scheduler set up by the property creates these batches. Depending on the property set up, users might need to use these batches to generate renewal offers manually.

Bed Count

This is the number of bedrooms in a unit.

C

Community

A community is the name used in YieldStar to refer to a property.

Competitors

With YieldStar, you can compare the pricing of each floor plan within your property to competing floor plans within your competitors' properties. "Competitors" are the other properties used in your price comparison; these may be other properties in your portfolio or the general geographic area of your property.

Concession

Concessions are made to entice a resident, or a potential resident, to sign a lease promptly. They may or may not lower the rent for a specified

period, and they may offer an "award" to the resident.

Current In-Place Leases

This is the number of leases that residents actually signed at a specific time horizon.

E

Effective Rent

Effective rent is the current floor plan rent that is used to calculate the Offered Rent after concessions are added.

Excel

A spreadsheet application from Microsoft, a component of its Office product group. You can generate most YieldStar reports in the Excel format for additional analysis.

Expected In-Place Leases

Expected in-place leases is the number of leases needed to maintain revenue optimal occupancy.

Expiring Lease

An expiring lease is one that is nearing its expiration date (end date).

F

Floor Plan

A floor plan is the layout of a unit or a group of units. It defines a particular unit type. For example, a property may have two different types of one-bedroom units, one with a larger kitchen. Each unit type is usually considered a separate floor plan. However, multiple unit types can be grouped into a single floor plan for statistical purposes.

Forecast Horizon

This is the number of days that YieldStar forecasts into the future (typically set to 12 weeks, or 84 days).

Forecast Leases

Forecast leases are the number of leases forecast to be in place at the end of the forecast horizon based on yesterday's rent.

H

Horizon End Date

The horizon end date is the forecast end date of the Price Optimizer forecast horizon, which is typically set to 12 weeks (84 days).

I

In-Place leases

In-place leases include all active and pending leases that expire outside of the forecast horizon.

In-Place Units

This is the actual number of leases in place as of the post date that will expire after the horizon end date.

L

Lease

A lease is a legal document describing an agreement between a resident and the property management company (PMC) or owner that spells out the terms and conditions for the rental of the unit.

M

Make-Ready

A make-ready is a special type of service request used to prepare a unit for a new occupant. A make-ready consists of make-ready service requests for each issue maintenance workers should complete to clean up and repair the unit for the new resident.

Month-to-Month (MTM)

A unit in month-to-month (MTM) status has a resident who has stayed in the unit beyond the scheduled end date of the lease. The resident pays an MTM rate and can move out within 30 to 60 days, depending on the number of days notice required by the property.

N

New Lease

A new lease is a contract signed by a new resident of an apartment complex. This person is usually moving in from another place of residence.

O

Offered Effective Rent

The offered effective rent is the actual rent accepted and in place for the floor plan.

Offered Effective Rent Percentage

The offered effective rent percentage is the market position of the current offered effective rent. For example, if the top of the market is $1,000 and the bottom is $800, then a rent of $900 represents a market position of 50%.

P

PDF

This is an acronym for *Portable Document Format*, a file format developed by Adobe Systems, Inc. PDF captures and encapsulates formatting information from YieldStar, making it possible to send formatted documents and have them appear on a computer monitor or printer as they were intended. To view a file in PDF format, you need Adobe Reader, a free application distributed by Adobe Systems.

Post Date

The post date or the data transmission date is the most recent date that Price Optimizer was updated with information from the property management system.

Property Management Company (PMC)

PMC is the common abbreviation for property management company, the manager of your property. In some cases, the PMC is the property owner.

Property Management System (PMS)

The property management system (PMS) is the software you use to manage your day-to-day business, such as creating quotes, leases, and renewal offer letters. The PMS also lets you manage ledgers, scheduled charges, unit amenities, and other functions that support multifamily business operations. For example, OneSite is a PMS.

R

Recent Average Effective Rent

This is the time-weighted average of the most recent qualified leases in the floor plan.

Recent Average Effective Rent Percentage

The recent average effective rent percentage is the market position of the time-weighted average rent for the most recent qualified leases in the floor plan. For example, if the top of the market is $1,000 and the bottom is $800, then a rent of $900 represents a market position of 50%.

Recommended Effective Rent Percentage

The recommended effective rent percentage is the market position percentage associated with the recommended rent. For example, if the top of the market is $1,000 and the bottom is $800, then a rent of $900 represents a market position of 50%.

Recommended Rent

Recommended rent is the rent recommended for the floor plan by YieldStar.

Renewal

Renewal is the extension of time or period of its existence to a future date of a lease agreement by maintaining the existing arrangements. Essentially, a resident signs a new lease for the same unit.

Renewal Lease

This is a renewal lease contract signed by a person agreeing to stay in his or her current apartment for a specified number of months.

Renewal Offer Rents

Renewal offer rents are rents generated by the system to include in a renewal offer letter.

Rent Matrix

A presentation of unit rents in a table with move-in dates for columns and terms as rows. The terms represent the number of months that the lease will be in effect.

Rent Roll

The rent roll is the total rent amount that your property is expected to receive, based on a register of rents that includes the names of tenants and the amounts due.

Revenue Change

The revenue change is the projected loss or gain over the current offered rent if you achieve the forecast leases and the residents all sign leases with 12-month terms.

S

Smoothed Maximum Peer Rent

Smoothed maximum peer rents are the average rents that make up the high end of the competitive market for this floor plan.

Smoothed Minimum Peer Rent

Smoothed minimum peer rents are the average rents that make up the low end of the competitive market for a floor plan.

Stale Unit

A unit that is vacant for longer than the historical average for units with the same number of bedrooms that went vacant in the same month of the year. Typically, units become stale due to circumstances such as inconvenient location, excessive nearby noise, poor accessibility, lack of upgrades, or other negative factors.

Sustainable Capacity

Sustainable capacity is an inventory constraint that reflects a specific asset strategy. It represents the average number of leased units a floor plan can typically maintain.

Sustainable Units

Sustainable units are the maximum average number of occupied units a floor plan can realistically achieve.

T

To Be Determined (TBD) Units

To be determined (TBD) units are units with leases expiring before the forecast horizon end date where the residents have not given notice or renewed.

U

Unit Type Adjustment

Unit type adjustments are small, short-term, temporary adjustments that the system does not normalize.

Y

Yesterday's Rent

Yesterday's rent is the rent the property offered for the floor plan yesterday.