THE COMPLETE

RealPage to Yardi

MIGRATION CHECKLIST

A comprehensive guide for property management companies
transitioning from RealPage OneSite to Yardi Voyager

Includes:

Module Mapping • Data Export Checklists • Timeline Framework
Terminology Translation • Testing Protocols • Go-Live Procedures
Multifamily & Commercial-Specific Considerations

2026 Edition

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Executive Overview

Migrating from RealPage to Yardi Voyager is one of the most significant technology decisions a property management company will make. Both platforms serve the same fundamental purpose—centralizing property operations, accounting, and tenant management—but they approach the problem differently.

This checklist is designed for operators who have already decided to make the switch and need a practical roadmap for execution. It covers the full migration lifecycle: discovery, data preparation, conversion, testing, training, and go-live.

What Will Feel Familiar

Both platforms handle core property management functions: tenant/resident management, lease administration, rent collection, accounts payable, general ledger, maintenance/work orders, and reporting. If your team understands property management fundamentals, the conceptual transition will be straightforward.

What Will Be Different

Yardi's architecture prioritizes deep accounting integration and customization flexibility. RealPage emphasizes operational automation and AI-driven analytics. Key differences include:

☐ Navigation and UI paradigm (Yardi's role-based dashboards vs. OneSite's workflow-centric design)

☐ Reporting approach (Crystal Reports/custom SQL in Yardi vs. Central Reporting in RealPage)

☐ Module integration philosophy (Yardi's single-database approach vs. RealPage's product ecosystem)

☐ Chart of accounts flexibility and GL structure

☐ User permission and security role granularity

Typical Timeline

A standard Yardi Voyager implementation takes 3-6 months depending on portfolio size, complexity, and the scope of historical data migration. Plan for:

Phase	Duration
Discovery & Planning	2-4 weeks
Data Cleanup & Prep	3-6 weeks (often parallel with configuration)
System Configuration	4-8 weeks
Data Migration	2-4 weeks (multiple test loads)
Testing & Validation	2-4 weeks
Training	2-4 weeks (often parallel with testing)
Go-Live & Stabilization	1-2 weeks intensive, then ongoing

⚠ **Warning:** Attempting to compress this timeline significantly increases risk. The most common cause of migration failures is insufficient testing and training time.

1. Module Mapping: RealPage → Yardi

Understanding how your current RealPage modules map to Yardi equivalents is essential for scoping your implementation and evaluating licensing costs.

Core Property Management

RealPage Product	Yardi Equivalent
OneSite Leasing & Rents	Voyager Residential / Voyager Commercial
OneSite Accounting	Voyager Core Accounting (GL, AP, AR)
OneSite Facilities	Voyager Maintenance / Maintenance IQ
OneSite Budgeting	Voyager Budgeting
OneSite Purchasing	Procure to Pay Suite / PayScan
OneSite Document Management	Document Management for SharePoint
RealPage Commercial	Voyager Commercial

Leasing & Marketing

RealPage Product	Yardi Equivalent
Knock CRM	RentCafe CRM
G5 Marketing / Websites	RentCafe Marketing / RentCafe Websites
LOFT Resident Experience	RentCafe Resident Portal
Online Leasing	RentCafe Online Leasing
AI Virtual Agent	Yardi Virtuoso (AI Platform)

Revenue & Analytics

RealPage Product	Yardi Equivalent
YieldStar Revenue Management	Revenue IQ / Yardi Pricing Optimizer
Performance Analytics	Yardi Analytics / Data Connect
Business Intelligence	Custom Reports / Yardi Pulse

Screening & Insurance

RealPage Product	Yardi Equivalent
Resident Screening	ScreeningWorks Pro
RealPage Insurance	Yardi Insurance Services

Utilities & Spend Management

RealPage Product	Yardi Equivalent
Utility Management	Yardi Energy Suite / Utility Billing
Spend Management	Procure to Pay Suite / Vendor Café

📌 **Note:** Not all modules require 1:1 replacement. Evaluate which RealPage products you actually use versus which are bundled but underutilized. This is an opportunity to right-size your technology stack.

2. Pre-Migration Discovery Checklist

Complete this discovery phase before signing contracts or setting firm timelines. The answers will determine your implementation scope, cost, and timeline.

Portfolio Inventory

☐ Total unit/square footage count by property type (multifamily, commercial, mixed)

☐ Number of legal entities and ownership structures

☐ Number of bank accounts requiring setup

☐ List of all properties with go-live priority ranking

☐ Properties with unique requirements (affordable housing, tax credit, HUD, senior living)

Current State Assessment

☐ Complete inventory of RealPage products currently in use

☐ List of third-party integrations (payment processors, screening, insurance, utilities)

☐ Custom reports currently in production use

☐ Data quality assessment: duplicate records, inconsistent formatting, stale data

☐ Outstanding open items: unreconciled bank accounts, unposted transactions

Business Process Documentation

☐ Move-in workflow (application → screening → lease signing → move-in)

☐ Renewal process and timing

☐ Month-end close procedures and timeline

☐ Year-end close procedures

☐ AP approval workflow and authorization levels

☐ Security deposit handling procedures

☐ Late fee policies and automation rules

☐ NSF/returned payment procedures

Team & Training Assessment

☐ Identify implementation project manager (internal)

☐ Identify department leads for training (accounting, leasing, maintenance, regional)

☐ Assess team's technical comfort level with new software

☐ Determine training format preferences (on-site, virtual, role-based)

☐ Plan for productivity dip during transition (typically 2-4 weeks)

Timeline Constraints

☐ Identify blackout periods (year-end, busy season, audit periods)

☐ Target go-live date and flexibility

☐ Contract end dates with RealPage (access duration post-migration)

☐ Budget cycle alignment

3. Data Categories & Export Checklist

Data migration is the most time-consuming and risk-prone aspect of any system conversion. Categorize your data to prioritize what must be migrated versus what can be archived or left behind.

Static Data (Must Migrate)

This data rarely changes and forms the foundation of your Yardi database.

☐ Property master records (addresses, codes, legal entities)

☐ Unit inventory (unit numbers, square footage, floor plans, amenities)

☐ Chart of accounts with account types and hierarchy

☐ Vendor master file with tax IDs and payment information

☐ Bank account information

☐ Charge codes and revenue categories

Transactional Data (Current State)

Current balances and open items that must be accurate on day one.

☐ Current resident/tenant roster with lease terms

☐ Recurring charges setup by unit/tenant

☐ Open AR balances (prepayments, outstanding balances)

☐ Open AP (unpaid invoices)

☐ Security deposit balances

☐ GL trial balance as of cutover date

☐ Open work orders

☐ Pending applications/prospects

Historical Data (Scope-Dependent)

Historical transaction detail is expensive to migrate and validate. Define your requirements carefully.

☐ GL journal entries (how many months/years?)

☐ Tenant ledger transaction history

☐ Payment history

☐ Vendor payment history (critical for 1099s)

☐ Work order history

☐ Lease history and amendments

Historical Data Scope Guidance

The amount of historical data you migrate significantly impacts project timeline, cost, and complexity. Here are common approaches:

Scope	What's Included	Trade-offs
Minimal	Current balances only. GL trial balance as of cutover. No transaction detail.	Fastest, lowest cost. Must maintain RealPage access for historical lookups.
Standard	12-24 months GL detail. YTD tenant ledgers. YTD vendor payments for 1099s.	Balances day-to-day needs. Most common approach.
Comprehensive	3-5 years of full transaction history across all modules.	Longest timeline. Highest cost. Most validation required.

💡 **Tip:** For most operators, the Standard scope provides the best balance. Keep read-only access to RealPage for 12-24 months post-migration to handle historical lookups that fall outside the migration scope.

⚠️ **Warning:** If you're migrating mid-year, ensure YTD vendor payments are captured for 1099 reporting. The deadline for 1099s is January 31, so plan accordingly.

4. Chart of Accounts Mapping

The chart of accounts is the backbone of your financial reporting. Mapping errors here cascade into every financial report.

Pre-Mapping Checklist

☐ Export complete chart of accounts from RealPage with account types

☐ Identify inactive accounts that don't need to migrate

☐ Review for duplicate or redundant accounts to consolidate

☐ Document account hierarchy and roll-up structure

☐ Identify accounts with different treatment (cash vs. accrual)

☐ Note any accounts specific to RealPage functionality that won't map

Mapping Considerations

☐ Yardi uses a flexible segment structure—determine your segments (entity, property, account, etc.)

☐ Map account types correctly (Asset, Liability, Equity, Revenue, Expense)

☐ Align sub-account structures

☐ Consider future reporting needs when designing Yardi COA structure

☐ Document mapping in a spreadsheet for validation

Validation Steps

☐ Run trial balance in RealPage as of mapping date

☐ Import COA to Yardi test environment

☐ Import trial balance

☐ Compare totals by account type

☐ Compare totals by property

☐ Investigate and resolve any variances before proceeding

📌 **Note:** This is an opportunity to clean up your COA. Don't migrate accounts you no longer need just because they exist in RealPage.

5. Third-Party Integration Evaluation

RealPage users often rely on multiple integrated products. Each integration needs a migration plan.

Integration Inventory Checklist

☐ List all third-party systems integrated with RealPage

☐ Document integration type (API, file transfer, manual)

☐ Identify data flow direction (inbound, outbound, bidirectional)

☐ Note contract terms and renewal dates

Common Integrations to Evaluate

Category	Common RealPage Integrations	Yardi Options
Payment Processing	ClickPay, PayLease	Yardi Payment Processing, or continue with existing processor via interface
Screening	RealPage Screening	ScreeningWorks Pro (Yardi), or third-party with Yardi interface
Insurance	RealPage Insurance	Yardi Insurance Services, or third-party
Revenue Management	YieldStar	Revenue IQ (Yardi)
Utility Billing	RealPage Utility Management	Yardi Utility Billing, Conservice, etc.

Smart Home/Access	Various (Ambient, SmartRent)	Yardi has interfaces with major providers
Accounting Export	To external GL systems	Yardi Data Connect, Replicate, or custom exports

Decision Framework

☐ For each integration, decide: Replace with Yardi native, Continue with existing vendor, or Discontinue

☐ For continued integrations, verify Yardi interface availability and cost

☐ Plan timing—some integrations can go live with Yardi, others may need to wait

☐ Budget for interface licensing fees (Yardi charges for many third-party interfaces)

6. Terminology Translation

RealPage and Yardi use different terminology for similar concepts. This translation guide will help your team communicate clearly during implementation and reduce confusion.

Concept	RealPage Term	Yardi Term
Person living in unit	Resident	Resident (MF) / Tenant (Comm)
Potential renter	Prospect/Guest Card	Prospect
Unit vacancy prep	Make-Ready	Make-Ready
Service request	Service Request	Work Order
Monthly charges	Recurring Charges	Recurring Charges
Rent schedule change	Rent Increase	Scheduled Charge / Escalation
Lease extension	Renewal	Renewal
Move between units	Transfer	Transfer
Invoice approval	AP Approval	PayScan / AP Workflow
Close period	Month-End Close	Period Close
Financial statements	Reports	Reports / Financials
Custom reporting	Central Reporting	Advanced Reports / Crystal
User access levels	Security Roles	Security Profiles
Commercial expense recovery	Recovery Billing	CAM Reconciliation / Recoveries
Tenant pass-through	Pass-Through Charges	Recovery Charges

💡 **Tip:** Create a terminology cheat sheet for your team and reference it during training. The most common source of confusion is using RealPage terms when asking for Yardi support.

7. Multifamily-Specific Considerations

Multifamily operators face unique challenges during migration due to high transaction volume and resident-facing processes.

Resident Data Migration

☐ Export all current residents with lease terms, rent amounts, and contact info

☐ Include roommates/occupants and their relationship to leaseholder

☐ Capture lease start/end dates accurately

☐ Document any residents on month-to-month status

☐ Export outstanding balances (both owed and prepaid)

☐ Capture security deposit amounts and types

Recurring Charges

☐ Export all recurring charges by unit (rent, pet fees, parking, etc.)

☐ Document scheduled rent increases and effective dates

☐ Identify concessions and their expiration dates

☐ Map RealPage charge codes to Yardi charge codes

Lease Documents

☐ Determine if lease PDFs will migrate to Yardi Document Management

☐ Establish naming convention for migrated documents

☐ Plan for in-flight leases (applications in progress at cutover)

Renewals & Move-Outs

☐ Export list of upcoming renewals with offer status

☐ Document residents with notices to vacate

☐ Plan handling of move-outs scheduled near go-live

⚠️ **Warning:** Avoid go-live during the last week of the month when move-out volume is highest.

Prospect & Application Pipeline

☐ Export active prospects and their status

☐ Export applications in progress

☐ Plan for screening results—they may need to be re-run in Yardi

☐ Decide cutoff for accepting new applications in RealPage

Resident Portal Transition

☐ Communicate portal change to residents in advance

☐ Plan for payment method re-setup (ACH, credit cards)

☐ Update autopay enrollments or require residents to re-enroll

☐ Test resident-facing functions before announcing new portal

8. Commercial-Specific Considerations

Commercial property management involves complex lease structures that require careful migration planning.

Lease Administration

☐ Export full lease abstracts with all terms

☐ Document base rent, percentage rent, and escalation schedules

☐ Capture option dates (renewal, termination, expansion)

☐ Export tenant improvement allowances and amortization schedules

☐ Document security deposit types and amounts

☐ Export lease amendments and their effective dates

CAM & Recovery Setup

☐ Document CAM pool structures and allocation methods

☐ Export expense exclusion lists by tenant

☐ Capture administrative fee percentages

☐ Document gross-up calculations and methodologies

☐ Export base year data for each tenant

☐ Plan timing around annual reconciliation (avoid mid-reconciliation go-live)

💡 **Tip:** The best time to migrate commercial properties is immediately after completing annual CAM reconciliations, typically Q1.

Billing & Escalations

☐ Export CPI escalation terms and indices used

☐ Document percentage rent calculations and breakpoints

☐ Capture straight-line rent calculations if applicable (GAAP)

☐ Export NNN charge breakdowns and pass-through categories

☐ Document late fee terms by lease

Tenant Correspondence

☐ Export tenant contact information and billing addresses

☐ Document invoice delivery preferences

☐ Plan for tenant portal transition (if applicable)

☐ Communicate system change to tenants in advance

Retail-Specific

☐ Export sales reporting requirements by tenant

☐ Document sales reporting periods and deadlines

☐ Capture percentage rent breakpoints and thresholds

☐ Plan for sales data collection process in Yardi

9. Testing & Validation Checklist

Testing is the most frequently underestimated phase of migration. Allocate sufficient time and involve actual end users, not just the project team.

Data Validation

☐ Compare unit count in Yardi to RealPage

☐ Compare resident/tenant count

☐ Validate GL trial balance totals match

☐ Validate AR aging totals match

☐ Validate AP open invoice totals match

☐ Validate security deposit totals match

☐ Spot-check individual tenant ledgers (sample 5-10%)

☐ Spot-check vendor balances

☐ Verify recurring charges are set up correctly

Workflow Testing

☐ Process a test move-in

☐ Process a test move-out with final accounting

☐ Process a test renewal

☐ Process a test transfer between units

☐ Enter and complete a work order

☐ Process a payment (check, ACH, credit card)

☐ Process an NSF/returned payment

☐ Enter and approve an AP invoice

☐ Run a check batch

☐ Complete month-end close procedures

Report Validation

☐ Run rent roll and compare to RealPage

☐ Run aged receivables and compare

☐ Run financial statements and compare

☐ Run occupancy report and compare

☐ Test all custom reports requested

Integration Testing

☐ Test payment processing integration

☐ Test screening integration

☐ Test any third-party interfaces

☐ Test resident/tenant portal functions

User Acceptance Testing (UAT)

☐ Have actual end users (not project team) test their workflows

☐ Document issues and questions for training

☐ Get sign-off from department leads before go-live

> ⚠️ **Warning:** Do not skip UAT. Issues discovered by end users after go-live are 10x more expensive to fix than issues discovered during testing.

10. Go-Live Cutover Checklist

Go-live is the transition from RealPage to Yardi as your system of record. Meticulous planning minimizes disruption.

Two Weeks Before Go-Live

☐ Confirm go-live date with all stakeholders

☐ Complete all training sessions

☐ Resolve all open UAT issues

☐ Confirm RealPage access will continue post-go-live

☐ Communicate go-live plan to all users

☐ Communicate portal change to residents/tenants

☐ Update autopay instructions if payment processor is changing

☐ Prepare hypercare support plan

One Week Before Go-Live

☐ Complete final data export from RealPage

☐ Freeze changes in RealPage (data entry cutoff)

☐ Load final data to Yardi production

☐ Validate final data load

☐ Distribute login credentials and user guides

☐ Confirm support contacts and escalation path

Go-Live Day

☐ Disable user access to RealPage (or set to read-only)

☐ Confirm Yardi production is accessible

☐ Verify integrations are flowing correctly

☐ Process first transactions in Yardi

☐ Monitor for issues and respond quickly

☐ Hold check-in calls with site teams

First Week Post-Go-Live (Hypercare)

☐ Daily check-ins with department leads

☐ Rapid response to support tickets

☐ Track and categorize issues (training vs. configuration vs. data)

☐ Provide just-in-time training as needed

☐ Document workarounds for known issues

☐ Process first payment batch in Yardi

First Month Post-Go-Live

☐ Complete first month-end close in Yardi

☐ Validate financial statements against expectations

☐ Process first bank reconciliation

☐ Review and refine workflows based on user feedback

☐ Transition from hypercare to standard support

11. Common Mistakes to Avoid

Learn from others' mistakes. These are the most common pitfalls we see in RealPage to Yardi migrations.

Planning Phase

☐ Underestimating timeline—budget 3-6 months, not 6-8 weeks

☐ Skipping the discovery phase—jumping into configuration before understanding current state

☐ Not involving end users early—leading to resistance and surprises

☐ Unclear ownership—who is the internal project manager?

☐ No executive sponsor—migrations need organizational support

Data Migration

☐ Migrating dirty data—garbage in, garbage out

☐ Not validating data loads—assuming accuracy without verification

☐ Over-scoping historical data—migrating 10 years of history you'll never use

☐ Under-scoping current data—missing critical balances or recurring charges

☐ Ignoring data cutoff timing—transactions entered after export but before go-live get lost

Configuration

☐ Over-customizing on day one—start simple, add complexity later

☐ Trying to replicate RealPage exactly—Yardi works differently, embrace it

☐ Not documenting decisions—you'll forget why you configured something

☐ Skipping security setup—leading to access issues at go-live

Testing & Training

☐ Insufficient testing time—rushing through validation

☐ Project team testing only—end users have different perspectives

☐ Generic training—users need role-specific, workflow-based training

☐ Training too early—users forget if trained weeks before go-live

☐ Training too late—users aren't ready on day one

Go-Live

☐ Going live at month-end—the worst possible timing

☐ Going live during busy season—renewals, move-outs, holidays

☐ No hypercare plan—users are abandoned with a new system

☐ Cutting off RealPage access immediately—you'll need it for historical lookups

☐ Declaring victory too soon—the first month will have issues

Next Steps

A successful RealPage to Yardi migration requires careful planning, clean data, thorough testing, and well-trained users. Most importantly, it requires experience—understanding the pitfalls before you encounter them.

This checklist provides a framework, but every migration has unique considerations based on portfolio complexity, business processes, and organizational readiness.

BC Solutions specializes in Yardi implementations, migrations, and ongoing support.

Our team includes CPAs, custom report writers, and business process experts

with decades of hands-on property management technology experience.

Learn more: **bcsolut.com/yardi-voyager**