# Accounting

## Accounting/Cash Management

### EE120  Yardi CHECKscan
- This course covers the basic features of Yardi CHECKscan, including bank relationship setup, check scanning, and tenant association. It will also cover the basics of daily routines, including checking the Collect Dashboard for any NSF and returned items, as well as the Collect Processor report for the daily transmission of funds.

### EE260  Online Payment Processing
- This course will focus on one-time payments made through RENTCafé. We will cover how to set up ACH and credit cards, demonstrate the process of making payments online, plus show how they are reflected on the ledger in Voyager and the resident services account. This course will also briefly cover the sign up process for recurring payments in RENTCafé. We’ll finish up by reviewing daily procedures and reporting. This course complements and is an excellent follow up to RENTCafé Resident Services: Core Functions (EW260).

### EE280*  Payment Manager
- This course will focus on our new recurring payment system, Payment Manager. We will cover the various setup options available within Payment Manager and how residents can be signed up for recurring payments in RENTCafé and Voyager. It will demonstrate the monthly recurring process and go into related reports and best practices when using automated recurring payments.

### EE370  Payment Processing Best Practices
- This course will cover Yardi CHECKscan, ACH, tenant-based fees, credit card best practices, and review features built into Yardi software to help optimize user efficiency and accuracy. Join us to learn about best practices for bank reconciliation, administrative functions, funds reporting, as well as other topics related to processing payments.

## Accounting/Finance

### AC050  Financial Reporting Overview
- This course is an overview of financial reporting options available in Voyager. After a brief presentation of each tool, we will open the course to a question and answer session geared towards helping users streamline financial reporting.

### AC131  Voyager Bank Reconciliation
- Learn how Voyager helps make the bank reconciliation process easier. This course will cover bank account setup, bank reconciliation features, processes, reports, and troubleshooting.

### AC133  Troubleshooting Bank Reconciliation
- Learn the troubleshooting basics of the Bank Reconciliation feature in Voyager. We’ll review the Bank Reconciliation Exception report and discuss the correct procedure regarding when and how to create adjustments. We’ll also discuss when Check Book Maintenance and the Unpost Bank Reconciliation functions are appropriate to use, and examine the importance of the Merge Deposit function in the Bank Reconciliation process.

### AC160  Financial Analytics
- Voyager contains powerful reporting tools to view financial data in a variety of ways. In this course, we will review how to obtain overview and detailed reports; break down financials by GL segments, property attributes, account trees, and GL books; and export reports to PDF and Excel with the click of a button. We will also cover enhanced reports with data marts and built-in real-time query optimization, and how to drop reports on an executive dashboard for a top-down view of your portfolio. (2 part session)

### AC165  Segmented Accounting in Voyager 7S
- Have you been looking for a way to create financial reports that reflect more detail without adding GL accounts to your Chart of Accounts? If so, GL segments may just be for you and your company! You can use GL segments to record and store GL data in categories, which allows you to create financial reports with more detail than ever before.
ACCOUNTING

AC206 New AP Functions in Voyager 7S
Curious about what’s new in the world of accounts payable in Voyager 7S? Then this class is for you! We will cover vendors and remittance vendors, AP templates, payment processing, credit card payables and more. Prerequisite: Introduction to Voyager 7S and/or a basic understanding of Voyager 7S. It is not required, but is suggested, to take this class paired with AC207 - New AR Functions in Voyager 7S.

AC207 New AR Functions in Voyager 7S
Curious about what’s new in the world of accounts receivable in Voyager 7S? We will discuss the quickest way to enter charges and receipts, and the new ledger cleanup functionality. Prerequisite: Introduction to Voyager 7S and/or a basic understanding of Voyager 7S. It is not required, but is suggested, to take this class paired with AC206 - New AP Functions in Voyager 7S.

AC208* New Core Functions in Voyager 7S
In this class, we will cover new features from the Voyager 7S core suite of plug-ins introduced over the last year. This class does not cover vertical-specific new functionality and is recommended for those who are currently using Voyager 7S or plan to upgrade to Voyager 7S.

AC210 Introduction to Account Trees
Account trees are powerful financial reporting tools that enable you to determine the format and description of your GL accounts at run time. Discover how this feature can save you time by streamlining and customizing your report writing processes.

AC215 Multifamily Management Fees with Cross Entity Trans
Explore Voyager’s Management Fee functionality and the enhancements it offers over the Pay Commission functionality. Learn how to let Voyager track and calculate your management fees, create payables on a recurring basis, and about new functionality that enables you to book AR on your corporate books for the pending income!

AC230 Month-End Processing for Residential
Attend this course to master the tools you need to properly complete an Accounting Month-End (AME) closure. You will learn the steps necessary to ensure accurate financial position reporting, look over sample AME checklists, and have an opportunity to reevaluate your own month-end procedures.

AC231 Residential GPR Explained
This course explains the setup and intricacies of the Gross Potential Rent (GPR) report and Post GPR Journal Entry function, and reviews corresponding effects on the general ledger. Learn how to troubleshoot GPR tie-out issues and gain knowledge that will ensure accurate reporting of your financial position.

AC235 Prepay Setup & Troubleshooting
Proper setup of the Voyager prepay functionality is critical to the most efficient and effective use of your receivables system. Join this course to learn the recommended setup and how to troubleshoot resident/tenant prepay issues.

AC237 Month End Tie-Outs: AR, Security Deposits, & AP
Month end is a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks.

AC241 Voyager 7S Intercompany
Learn about the Intercompany functionality new to Voyager 7S that tracks each relationship with a segment. This includes how to setup Voyager 7S-style intercompany, how to create intercompany transactions with this setup, and intercompany reporting. It is recommended that you have a basic understanding of segments before taking this class.

AC245 Voyager 1099s
This course will review how to generate 1099s and the appropriate flags to set to create the records for 1099 reporting. The instructor will review general setup for Voyager 1099 functionality.

AC250 Correcting Resident & Tenant Ledgers
Accurate resident and tenant ledgers are essential for successful property management. Attend this course to ensure the accuracy of your books and tie-out process. We will show how to identify and correct errors in resident and tenant ledger balances and spot inconsistencies between ledger and receivable reports. This course does not cover content relevant to HAP or other specialized ledgers.

AC260 Mortgage Accounts Payable
The Mortgage Accounts Payable functionality in Voyager enables property managers to organize, manage, and report on mortgages held by third parties. This course will demonstrate methods of defining a mortgage and the system’s ability to amortize a payment, schedule it, and post it through to the general ledger. We will address the support of multiple escrow line-item payments, optional extra payments to principal, and balloon payments. Topics will also include assigning payables to GL segments, key reports, and the mortgage projection calculator.

AC310 Financial Best Practices in Voyager
The “by design” accounting features built into your Voyager software optimize user efficiency and accuracy with financial reports. Join this course to learn about this and other topics such as general ledger account setup, month-end procedures, charge code definitions, transaction processing, and more. Learn how to apply accounting best practices to your Voyager system. (2 part session)
Accounting

AC320  GL Allocations
Learn how to use the general ledger tool in Voyager to increase your efficiency when allocating income and expenses from source properties/entities to multiple target properties/entities. Discover how Voyager automatically calculates and splits allocations, and creates journal entries based on the percentages that the user specifies.

AC340  Advanced Account Trees
This course will enhance the skills acquired in the Introduction to Account Trees course (AC210). In this supplemental class attendees will learn how to set up more complicated account trees to create more detailed financial statements. The instructor will also demonstrate how to alter the appearance and the totaling of financial statements to accommodate your organization’s unique reporting requirements.

Accounting/Procurement

EP030*  Yardi Procure to Pay: VENDORCafé, Yardi Marketplace, Yardi PAYscan
Yardi Procure to Pay (P2P) includes three components. VENDORCafé is our portal supporting vendor on-boarding and certification, submission of invoices, and queries on payment status. Yardi Marketplace is our off-the-shelf procurement catalog with negotiated prices for national vendors. Invoices for Marketplace purchases are delivered into Yardi PAYscan electronically. PAYscan is our AP solution offering paperless invoices and robust invoice workflow approvals. For clients who have licensed Payment Processing, the Bill Pay feature allows you to outsource check writing and delivery of ACH electronic payments. This class will explain how these modules work together in an integrated platform to support and enhance efficient business processes.

EP040†  Introducing Bill Pay via Yardi Payment Processing
Attend this session to see how Yardi can be your bill-pay service with a new addition to your core Voyager functionality: Bill Pay. With Bill Pay, Yardi facilitates making payments to your vendors, owners, and tenants via physical checks and ACH.

EP050  Yardi PAYscan Demo
This course provides an overview of Yardi’s Procure to Pay solution with emphasis on invoice processing, service contracts, and payments (check and EFT). PAYscan delivers consistent policies, eliminates paper invoices, and facilitates electronic invoicing. Come see the full transaction lifecycle, from PO to scanned invoice to payable to check/EFT. If you’re looking for ways to improve your AP process, this class is for you!

EP150  Yardi PAYscan Basics
◆ Yardi PAYscan delivers consistent policies, eliminates the physical movement of paper, and facilitates electronic invoicing. Come see the full transaction lifecycle - from converting your paper invoices into electronic invoices, to approving and posting them, to payable invoices. Learn about dashboards and how to track, monitor and approve your invoices on the device of your choice using Voyager, our PAYscan app, or our newly mobile-enabled Procure to Pay software.

EP155*  Yardi PAYscan: New Features for the Voyager Plus Platform
◆ A new version of Yardi PAYscan is now available for Procure to Pay (P2P) on the Voyager Plus platform. This free add-on provides a streamlined PAYscan user experience and offers features like customizable dashboards, a simple user interface, and cross-browser compatibility. PAYscan for Voyager Plus will improve the efficiency and experience of the P2P products. Attend this class to see a demo of what PAYscan will offer and how you can best use this new product to your advantage.

EP175  Purchase Orders
◆ Attend this course to learn about Yardi basic and advanced purchase order functionality. This class will be taught in Voyager 7S and is appropriate for clients using Voyager 6 and PAYscan. In this course you will learn the economic benefits of purchase orders and how to streamline purchase orders into a more standard and efficient process. This class will cover all aspects of using purchase orders in the Voyager system. (2 part session)

EP180  Service Contracts & AP Templates
◆ This course offers an overview of Voyager Service Contracts and AP templates. While Service Contracts help you manage recurring contracts with vendors, AP templates are extremely helpful with reducing data entry work and increasing efficiency. Come to this class to learn how to add, approve and use Service Contracts and AP templates. This class will be taught in Voyager 7S and is appropriate for clients using Voyager 7S, clients migrating to Voyager 7S, and PAYscan clients.

EP220*  PAYscan and AP: Best Practices and Industry Norms
◆ With over five years of product history and over 1,000 clients, the PAYscan AP database contains a wealth of industry information. We have mined this data, analyzed summary statistics, and are ready to share the results with our users. How many invoice approval workflows does a typical organization employ? How long does it take to approve an invoice? How many individuals must review an invoice before it is approved for payment? To what extent are purchase orders used? See how you stack up against your peers.
**Affordable Housing**

**EP310** Yardi PAYscan Master Class

*Want to become a Yardi PAYscan power administrator? We will teach you methods to unlock the power of Yardi PAYscan and increase your AP department’s efficiency. Learn how to effectively troubleshoot any challenge that your staff will encounter. Explore the latest options in AP configuration that can maximize Yardi PAYscan’s effectiveness. Learn about custom reports, stored procedures and pre-compilation validation. This class is designed for more technical attendees interested in learning valuable PAYscan functionality. We will also cover new P2P mobile capabilities enabling you to review, edit, and approve invoices “on the go” using the device of your choice.

**EP320** Yardi PAYscan Tips & Tricks

*If you are a PAYscan administrator, attend this session to learn tips and tricks to increase your AP department’s efficiency. We will cover short cuts to move items through the approval workflows more quickly, accomplish tasks with fewer mouse clicks, and set up the configurations that will help the program better anticipate your users’ choices.

**ES040** Yardi Marketplace Overview

*This course provides an overview of Yardi’s off-the-shelf procurement catalog, featuring national partners such as The Home Depot, Grainger, Staples, and others. This class addresses how to create purchase orders from the electronic catalog. Procure to Pay fully automates the entire AP process, from purchasing to invoice processing to payable creation, with fully customizable, role-based approval workflows. If you are interested in improving the efficiency of your procurement processes, this class is for you!

**ES070** Voyager VENDORCafé

*This course provides an overview of Yardi’s newest solution focused on helping our clients manage their important relationships with vendors. VENDORCafé is an add-on to Yardi’s Procure to Pay solution and provides a portal capability that allows vendors to submit W-9s, COIs, and other documents required for vendor operations, as well as to submit invoices. The vendor on-boarding process is supported by automatic loading of vendor information to Voyager. From an invoice processing perspective, the portal will allow the vendor to submit invoices to the client for payment, view invoice approval status, and gain insight to payment information.

**AF060** RENTCafé Affordable Housing Roundtable

*RENTCafé Affordable Housing provides extended resident and prospect portal features to affordable housing providers. Join a discussion with your peers to learn how this product helps improve the prospect and resident experience while reducing the cost of compliance. [50059, Tax Credit]

**AF100** Spotlight on Affordable Housing

*Join us for a discussion of recent and upcoming product changes. This session will be a great foundation for the affordable housing courses scheduled this week. We will highlight important features to be aware of that could help streamline your organization’s processes. [All Subsidy Types]

**AF112** RENTCafé Affordable Housing New Features

*RENTCafé Affordable Housing continues to evolve. Join us as we discuss updated reporting and statistics, the new property manager dashboard, and the addition of Electronic signatures to additional documents. We have also provided a feature that permits the applicant to invite roommates to join the application process. [All Subsidy Types]

**AF115** RENTCafé Affordable Housing Applicant Workflow

*Interested in automating your compliance interviews, or allowing prospects to complete applications conveniently from anywhere? Check out this overview of RENTCafé Affordable Housing from the applicants’ point of view. Learn just how easy accurate compliance interviews have become! [All Subsidy Types]

**AF135** RENTCafé Affordable Housing Site Manager

*This course will explore and demonstrate the features and work processes designed to manage online applications. From initial applications to annual recertifications, you will see how the RENTCafé Affordable Housing experience seamlessly ties into your Voyager program. [All Subsidy Types]

**AF150-1** Affordable Housing Waiting List: Setup

*Learn to set up and use the Affordable Housing waiting list. Course topics include basic setup and usage, preference setting, waiting list reporting, applicant selection, as well as applicant record logs and updates. We will also demonstrate useful tools to help import a waiting list into Voyager. [All Subsidy Types] (Part one of a two-part class)

**AF150-2** Affordable Housing Waiting List: Workflow

*Learn how to get the most out of your waiting list. This class covers the day-to-day use of the waiting list, waiting list reports, and handling multiple waiting list requirements for a single property. We will also discuss troubleshooting common issues. [All Subsidy Types] (Part two of a two part class)
Affordable Housing

AF180 Understanding the 50059 Workflow

HUD released TRACS version 2020 on August 1, 2014. Learn how changes to the 4350.3 and 202D MAT guide affect the 50059 workflow. This course discusses new required data elements, changes to existing elements, and the elimination of unused elements. This course also reviews the revised forms 50059 and 50059A. We will also discuss changes to the Affordable Housing workflow. [50059]

AF201 Affordable Housing Best Practices

In this course we will share the best practices our support team has discovered while working with our clients over the years. We will discuss the tools within Voyager to help your company be more efficient and effective. [All Subsidy Types]

AF202* Introduction to Local Programs

Managing multiple compliance programs on a property can be challenging, especially when state, city and local programs are added to the mix. Join us as we preview a new addition to Voyager Affordable Housing known as Local Programs. In this session we will explore how to manage an unlimited number of compliance programs with conflicting rules, income and rent limits. Learn how to set up and administer local programs including establishing income and rent limits on a program-by-program or unit-by-unit basis. Discover how applicants are determined qualified or unqualified for any compliance program mix. We will also be looking for your insights and input as we bring this this new addition to market. [Local Programs]

AF218 Introduction to Affordable Housing Letters & Forms with FillDocs

Use Word to create, customize and fill letters, notices, leases, and other compliance-related correspondence. In this introductory class you will learn the basics of creating a Word template file for verification letters and notices, the use of tokens to pull data from Voyager, and how to find lists of pre-defined tokens. [All Subsidy Types]

AF227-1 Repayment Agreements: Setup

With the EIV mandate, repayment agreements have become a growing part of managing Section 8 properties. This three-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing product. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. This is the second of three parts, in which we will discuss the proper way to use repayment agreements and provide examples of real world situations. [50059] (Part two of a three part class)

AF227-3 Repayment Agreements: Troubleshooting

Repayment agreements are a growing part of managing Section 8 properties since the mandate of Enterprise Income Verification (EIV). This three-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing product. This feature allows users to track repayment agreements and associated expenses and automates monitoring and forwarding collections to HUD. This is the third of three parts, in which we will discuss troubleshooting common mistakes and addressing incorrect postings. [50059] (Part three of a three part class)

AF236 Affordable Housing Unit Transfers

Unit Transfers are not always straightforward and correcting mistakes can be challenging. This session will discuss best practices for the unit transfer process. We will cover proper usage of the function, recommended configuration, and tips to avoid mistakes. We will also explore the proper way to correct mistakes when they do occur. [All Subsidy Types]

AF240 Solving HAP Voucher Issues

Learn to detect and resolve common issues that arise during the creation and submission of HAP and TRACS vouchers. We will discuss common and not-so-common issues, their resolution, and prevention. [50059]

AF243* Affordable Housing Rent Changes

Each subsidy type has its own unique requirements and challenges when dealing with rent changes. In this class, we will discuss best practices for applying rent changes in single-subsidy properties. We will also discuss reports to help troubleshoot rent change issues. Join us to learn more about this potentially complex subject. [All Subsidy Types]

AF260-1† Affordable Housing Accounting Part 1: Setup

Proper setup of Voyager affordable housing accounts is critical to the most efficient and effective use of Voyager Affordable Housing. Attend this course to review the best practices setup of affordable housing accounts and how these accounts will affect financials. You will learn how to set up the affordable housing general ledger accounts, including the suspense account, and where to map this information to ensure that monthly activity reflects correctly on financials. (Part 1 of a 4 part series) [All Subsidy Types]
Affordable Housing

AF260-2† Affordable Housing Accounting Part 2: Monthly Procedures

Proper monthly procedures optimize the performance of Voyager Affordable Housing. Attend this course to learn more about different Voyager options that can enhance monthly processes at affordable properties. You will learn how to use tools for correcting resident ledgers when data entry mistakes occur or when retroactive subsidy adjustments are needed. (Part 2 of a 4 part series) [All Subsidy Types]

AF260-3† Affordable Housing Accounting Part 3: Reports

Voyager Affordable Housing receivable reports are enhanced to reflect the financial condition of affordable housing properties. Attend this course to learn about affordable receivable reporting options available in Voyager. You will learn about affordable housing receivable reports and how they differ from residential reports. The course also provides an overview of the monthly tie-out process between the sub-ledger and general ledger for affordable housing properties, including a review tool available to troubleshoot tie-out issues. (Part 3 of a 4 part series) [All Subsidy Types]

AF260-4* Affordable Housing Accounting Part 4: Troubleshooting

Accurate resident ledgers are essential for successful property management. Learn how to ensure the accuracy of resident ledgers. The course focuses on handling subsidy charges and payments. You will also learn how to use the affordable housing accounting exceptions report for identifying and correcting errors in resident ledgers and inconsistencies between ledgers and receivable reports. (Part 4 of a 4 part series) [All Subsidy Types]

AF270† Tax Credit Best Practices

This course discusses best practices and setup of tax credit properties within Voyager Affordable Housing. Learn about recertification waiver implementation, rent restrictions that differ from income restrictions, the new Tax Credit Rent Change function for utility allowances, and discuss necessary monthly and annual tasks that ensure continued compliance. [Tax Credit]

AF290 Affordable Housing Ad Hoc Reporting

One of the lesser known and used features of Voyager Affordable Housing is its ad-hoc reporting capabilities. This course will introduce Affordable Housing Ad Hoc Reporting and explore various ways to craft reports for those unusual situations that lie outside the capabilities of standard reports. [All Subsidy Types]

AF291* Understanding Affordable Housing Analytic Reports

Join us for a deep dive into some of the popular compliance reports available in affordable housing analytics, specifically including certification listing, max rent audit, unit mapping, and wait list. [All Subsidy Types]

AF318 Advanced Affordable Housing Letters & Forms with FillDocs

Use Word to create, customize, and fill letters, notices, leases, and other compliance-related correspondence. In this advanced class you will learn how to set up your Tax Credit Lease, combine many separate documents into a single report package, as well as additional advanced features available using FillDocs. [All Subsidy Types] (This course is a follow up to AF218)

AF330 Developing Affordable Housing Processes & Workflows

Have you seen the Voyager Affordable Housing monthly procedures quick menu? Would you like to create your own with built in step-by-step instruction, links to training videos, and documents? This class will provide instruction on creating custom quick menus for Voyager users and facilitate an open discussion to share ideas and tips for optimizing your organization’s workflows and procedures. Also, learn how to stay informed of new Affordable Housing features, reports, and permission changes. [All Subsidy Types]

VAUG Voyager Affordable User Group

The Voyager Affordable User Group is a forum where users can network, train, and share practices across the compliance industry. Join our subject-matter experts and industry leaders for discussions centered around the compliance industry and the Voyager Affordable Housing product.

Commercial

CM045 Yardi Smart Energy Suite for Commerical Properties

Utility expenses are the largest source of operating expenses under your control. Discover how the Yardi Smart Energy Suite can help you reduce administrative costs of managing your utility bills, automatically run your HVAC plant more efficiently, recover revenue through submetering and tenant billing, shop for cheaper electricity, and easily file data with ENERGY STAR and GRESB.

CM050 Spotlight on Commercial & Investment Management

Join this course to learn about the Yardi Commercial Suite, designed to help reduce business cycle times and drive workforce efficiency. This course provides a brief introduction to Yardi Advanced Budgeting & Forecasting, Commercial LeasingPad, Orion Business Intelligence, COMMERCIAL Café and Procure to Pay. We will also discuss the product roadmap for Investment Management, which includes InvestorPlus and Investor Portal.
Commercial

CM060* Best Practices for Upgrading to Voyager 7S Commercial
- It is vital to keep your Voyager software up-to-date. This course is designed to educate on how the upgrade process works, why it's important to upgrade, and the pre- and post-upgrade steps required to make the upgrade an success. This class is recommended for clients who are on SaaS Select or Private Cloud.

CM070* Yardi Matrix for Commercial
- This course covers the use of Yardi Matrix as a decision-support tool that facilitates multifamily investment transactions by proactively identifying acquisition and new development candidates. Learn how our mapping technology enables you to visualize both the geography and your investment criteria. See how loan maturity information, detailed unit mix data, sales comps, rent comps, and NAA expense data can be used to estimate valuations and populate an acquisition model, enabling you to pick the needle in the haystack and avoid unproductive time pursuing incompatible deals. (This course covers the same material as RM070)

CM100* New Commercial Functions in Voyager 7S
- This course is a review of the most important new features in the past 6-12 months and a preview of upcoming changes in the next year to core Voyager 7S Commercial.

CM110 Basic Lease Administration & Setup
- Explore the commercial lease management functionality in Voyager and discover how easy it is to set up properties, buildings, floors, and units, as well as customers, leases, amendments, and other options. We will review the system's unique commercial view and leasing workflow, and attendees will walk away familiar with the setup fundamentals necessary to fully utilize system features.

CM135 Commercial Month-End Processes
- This course will provide a review of month-end processes recommended for Commercial module users, including financial reporting and tie-out, applying credits, commercial billing, management fees, closing the period, and more.

CM140 COMMERCIALCafé
- COMMERCIALCafé is your company's online marketing presence for tenants and prospects. Provide greater visibility of available leases and promote properties for sale, while integrating corporate brand identity and messaging. Additionally, provide tenants with best-in-class services through access to online payments, tenant statements, maintenance requests, and other service offerings. Listings available on COMMERCIALCafé include all real estate property categories such as commercial office space for lease and for sale, hotels and motels, retail space, and land for sale.

CM150 Basic Recoveries
- Join this course to learn how the Voyager recovery toolset helps users accurately process CAM recoveries. The instructor will review recovery reconciliations and tenant charge schedule adjustments using our intuitive toolset and straightforward reconciliation function. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM165 Leasing Lifecycle & Commercial Workflows
- This course provides an overview of the leasing lifecycle and commercial workflows from start to finish. Take your commercial deal or prospect through an activated amendment and move-out accounting.

CM171 Commercial LeasingPad: Mobilize Your CRM
- Yardi Commercial LeasingPad centralizes valuable customer and contact information in a single, global database. This course will review how to leverage the strengths of a browser-based platform designed for the tablet, and will provide real-time access to all activities related to all of your customer and leasing pipeline data. We will demonstrate how Commercial LeasingPad automates the leasing process from lead generation to lease execution by capturing the relevant data through each step of the process.

CM180* Tax & Insurance
- The Tax and Insurance function of Yardi Voyager allows you to track information about tax parcels and insurance policies related to properties, vendors, customers, owners, and leases. Tax and Insurance helps you manage your responsibilities and ensure that all tax liabilities are paid and all insurance policies are up-to-date. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM201 Introduction to Voyager 7S
- Discover Yardi Voyager 7S, the company's first cross-browser release. Learn how the new navigation features and ability to work on multiple platforms - from PCs to iPads - enhance the user experience. Discover the next generation of Yardi Voyager. (PH201 and RM201 will cover the same material)

CM205 Commercial Best Practices
- Get the most out of your Voyager Commercial experience by utilizing best practices recommended by our Professional Services Group. Discussions on Commercial Analytics, tasks and notification automation, report packets, custom tables, ad hoc reports, and more.

CM230 Advanced Lease Administration
- Learn how to manage long-term leases in your database with lease administration in Voyager 6.0. This course will cover advanced administration tools for modifying, expanding, contracting, renewing, and re-measuring. Prerequisite: CM110 (Basic Lease Administration & Setup)

Icon legend on page final page
CM231  Retail Calculations & Reporting

Learn how to manage long-term retail leases in your database with lease administration in Voyager 6.0. This course will teach you how to set up the retail system, track tenant retail sales, and charge overage (percentage) rents. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM240  Orion Business Intelligence for Commercial

Discover how Orion Business Intelligence provides a browser-based business intelligence platform to report on your entire portfolio. This course will introduce the Orion BI platform built from your Voyager database, and review tools such as SQL Server Reporting Services and SQL Server Analysis Services. Topics covered include: interactive and configurable dashboards that show key performance indicators, history, trending, and the use of Excel to create your own custom Business Intelligence reports.

CM250  Straight Line Rents

Learn how to implement FASB 13 and automate straight-lining of rents in Voyager’s Commercial module. This course will cover features associated with basic configuration, calculation of amortization schedule, journal entries, and reporting. Topics include best practices for scenarios such as setting up a lease that has been straight-lined in another system, early renewals, early terminations, retroactive amendments, and optional parameters for custom requirements.

CM260  Reporting & Cost Inducements

Attend this course to learn how to use the commercial analytic reports, including the dynamic tenancy schedule. The instructor will cover other features in Voyager Commercial, such as costs/inducements. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM270  Commercial Toolbox

Learn how to utilize tools that simplify the life of a lease administrator or property manager by accomplishing daily tasks in bulk. The instructor will demonstrate how to create custom ad hoc reports that allow you to report on standard data, user defined fields, and custom tables. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM305*  Advanced Commercial Best Practices

Get even more out of your Voyager Commercial experience by utilizing best practices for special cases recommended by our Professional Services Group. Discussions on mixed-use property setup, attributes, GL segments, creative uses for Yardi leases, management fees, correspondence, and more.

CM331*  Advanced Retail Calculations & Reporting

This class will provide in-depth training on the powerful retail percentage rent calculations in Voyager, along with the associated reporting capabilities. Prerequisite: CM150 (Basic Recoveries)

CM341*  Advanced Orion BI for Commercial

Discover how Yardi Orion Business Intelligence can be tailored to deliver the specific metrics you need to track to improve and grow your business. Learn how to integrate custom data into Orion Business Intelligence, build custom metrics, and explore other customization techniques through specific examples for the commercial market. We will walk you through how to identify business needs, define necessary metrics, and build solutions using the toolset within Orion Business Intelligence.

CM350  Complex Recoveries

This course covers the more complex recovery scenarios such as segmented recoveries, custom denominators, cap/min, recovery-by-unit, periodic (non-annual) recoveries, gross-ups, anchor deductions, and recovery accrual. Prerequisite: CM150 (Basic Recoveries)

CM355*  Strategies for “Perfect” Expense Pool

Learn how to setup the simplest CAM Expense Pools imaginable, including the NEW Advanced Recoveries Expense Pools (a.k.a. Cost Distribution)! Session will discuss strategic options for Expense Pools setup, how to help standardize usage portfolio-wide, and document policies and procedures when using Voyager’s CAM module. The course includes a discussion of the pros and cons of conventional vs. advanced recoveries. Prerequisite: CM150 (Basic Recoveries)

OIFG  Office/Industrial Focus Group

Join members of the commercial support and development teams along with your peers from the office/industrial market for an open discussion on topics such as best practices strategies, leasing process efficiencies, interactive stacking plans, and more, including what is in the development track for future releases.

RFG  Retail Focus Group

This is a roundtable discussion format that provides a unique opportunity to interact with product management and development to help influence future product direction. This group is specifically targeted to the retail markets.
What’s New in Yardi eLearning

Catch up with the latest developments in Yardi eLearning. We’ll take a look at the innovative features in eLearning version 4.1, including the new course builder tool and robust learning plan functionality. Also learn about new integrations that bring together HR systems, help desk software, and webinar management programs to streamline your training from user creation to event attendance tracking. Join us and see what’s new in Yardi eLearning.

Course Authoring Tools in Yardi eLearning

Maximize your training ROI by fully utilizing the Yardi eLearning solution. Discover how easy it is to quickly develop courses on a variety of topics or modify courses from Yardi’s catalog to meet your training initiatives. In this one-hour authoring challenge, we will take an internal policy document and turn it into an eLearning course that features engaging student interactions, a full procedural tutorial, quiz questions, and a final exam, all with a clean, modern look.

Getting Started with Yardi eLearning

Learn what it takes to get Yardi eLearning up and running for your company. We’ll go over possible configuration options to customize the platform to work best for your company and increase the efficiency of your training program. Setup single sign-on and nightly HRIS syncs to pull in user information. Use strategic groupings of users to automatically assign courses and empower supervisors to individually coach employees and run progress reports. We’ll also look at how to setup notifications for both students and administrators to avoid daily reporting and keep you focused on what matters most: the learning and development of your users.

A Day in the Life of an eLearning Administrator

Learn how to complete your daily administrative eLearning tasks in less than an hour a day. From moderating discussions, validating coursework, adding users, assigning courses, and running reports, we will cover everything you might need to do on a daily basis. Moreover, we will look at some tips and tricks to save time in the future by leveraging some key settings and features.

Managing Instructor-Led Events in Yardi eLearning

Manage and track all of your live events, whether they are in-person or over the web using Yardi eLearning. Import your webinars from Citrix, Cisco, or Adobe to streamline your virtual meetings and add tests to capture knowledge retention. Limited space? Utilize the waitlist functionality to fill your training seats and let the platform take care of the rest. We’ll walk through the event process from creation to closing attendance!

Proving ROI with Yardi eLearning

Everyone is looking for results, whether students are evaluating their training opportunities or executives are looking at the training bottom line during budgeting season. Spend an hour looking at how you can prove ROI with Yardi eLearning. We will dive into reports and look for statistics on the admin dashboard, in user accounts, hidden within courses, as well as show you how to use eLearning courses and tests to gather relevant data. The next time a question arises, you’ll be prepared.

Increasing Retention Using Micro-Learning Options in Yardi eLearning

Got fifteen minutes to train? Make the most of it by using micro-learning to feed your employees smaller bits of information more frequently, increasing retention across all levels of your training program. Learn how to create micro-learning moments in Yardi eLearning, including mini-webinars, learning tasks, and one-page courses. Deliver these lessons using strategically scheduled learning plans to keep users learning during moments throughout the day. Complement the micro-learning program with unlockable resources and mini-lesson newsletters. Begin re-thinking your training program today.

Advanced Course Authoring Tools in Yardi eLearning

Are you ready to take your instructional development to a new level? We are going off the map in this session to uncover some advanced techniques that take your eLearning pages beyond the confines of the author toolbar. We will look at advanced usage of tables for formatting content, floating tables, creative linking ideas, hover image reveals, invisible buttons, auto-play audio, and animations. Bring your creative ideas and be prepared to explore the options in this instructional design adventure.

Whether you are new to Yardi eLearning or are an experienced power-user, your ideas and opinions are extremely valuable for the success of our future platform and content development. We are devoting some time during the conference to hear how you’re using the eLearning platform to support your training initiatives. We’d also like to hear what aspects of the program you’d like to see us develop further. Our roundtable discussion spans two Friday morning sessions so you can pop in, say hello, and share your ideas in person before leaving the conference!
Marketing

**EW010** The RENTCafé Experience: Start Anywhere, Finish Anywhere
This course provides a live demonstration of RENTCafé Connect, RENTCafé CRM, and RENTCafé Portals. We will touch on insurance, Resident Screening, and RENTmaximizer as they relate to the online leasing workflow in RENTCafé. During class, we will make a live call to the call center from the website, create a guest card, pick up the guest card in CRM and “show” the unit, go through an online application in RENTCafé Portal, go through RENTCafé resident portal setup, make a live call to the resident call center, and create a work order.

**EW130** RENTCafé Property Marketing
This course covers RENTCafé property marketing basics with special emphasis on easy-to-implement features that will give your property a strong online presence. We'll discuss all you need to know to set up your property and go live with a solid marketing website.

**EW170** RENTCafé Online Leasing Workflow
Maximize the potential of RENTCafé Online Leasing. This course will cover available features available to customize your online presence for prospective applicants. Course attendees will learn about online leasing fundamentals, as well as recommendations for optimizing applicant workflows, lease generation, reviewing end-to-end online leasing, and other items to help generate leads.

**EW205** RENTCafé Marketing Strategy
You’ve built your websites, now what? This class looks at how to align your marketing initiatives with consumers’ intent and expectations. We will review current trends in multifamily marketing, social media best practices, and how to increase leads.

**EW206** RENTCafé Extended Marketing Features
You’ve built out your RENTCafé Marketing Site but what about all of those other great RENTCafé features? This class highlights our extended marketing features including, but not limited to, blogs, nudge marketing, promo codes, marketing manager, classifieds, and social referrals.

**EW260** RENTCafé Resident Services: Core Functions
Learn how to maximize resident retention through RENTCafé Resident Services. Course attendees will receive an overview of payment settings including text-to-pay, maintenance requests, lease renewal, concierge features, page narratives, tooltips, and much more. This course complements and is an excellent follow-up to Online Payment Processing (EE260).

**EW290** RENTCafé Troubleshooting Tips, Tricks, & FAQ
This course empowers you to leverage the tools and reporting that RENTCafé Site Manager provides. You will learn how to troubleshoot common issues while also reviewing frequently asked questions and the basic techniques to answer those questions.

**EW320** RENTCafé Advanced Property Marketing
This course covers a wide range of advanced features that are not covered in our standard RENTCafé Property Marketing course (EW130). These features are directed at improving the prospect experience, integrating social media, and customizing your marketing sites. This course is intended for savvy marketers who want to dig into advanced options for managing their online presence.

**EW330** RENTCafé Advanced Online Leasing Workflow
The RENTCafé Online Leasing advanced functionality offers a wide range of features that surpass the fundamentals covered in our standard RENTCafé Online Leasing class (EW170). This course is intended for individuals familiar with RENTCafé Site Manager and Online Leasing and will expand beyond the workflow into setup and configuration best practices. The material will include an overview of online leasing-related settings and include features such as applicant invites, applicant grouping, and customizing your workflow and appearance.

**EW360** RENTCafé Resident Services: Enhancing the Resident Experience
Learn how to communicate and engage with residents using Resident Services through Site Manager. We will discuss customizing a homepage with a bulletin board, creating announcements and events, building out a resident/community page, managing email, SMS, and text to pay, utilizing ratings and reviews, and even more. This course is a great follow up to Resident Services - Core Functions (EW260).

**EW370** Advanced Lease Document Management
Come learn about Yardi’s new, exciting, and powerful Lease Document Management tool. This course is designed to help you master the art of creating lease documents and addenda. We will show you this new tool and how the finished lease documents will work for online leasing through RENTCafé. The new interface is simple, intuitive, and creates a seamless process for your leasing staff, new residents, and lease renewals alike.

**EW375** RENTCafé Blue Moon Best Practices
The Blue Moon Online Leasing experience with RENTCafé just got even better. This course will cover the relationship between RENTCafé and Blue Moon, best practices for generating a Blue Moon Lease through Site Manager, new Blue Moon-related features available in site manager, and Blue Moon configuration recommendations.

**KT145** RENTCafé CRM: Introduction
Join our introductory course designed for clients who are preparing to go live with RENTCafé CRM. Learn how to navigate the dashboard, search for residents and prospects, reporting, the calendar, RENTCafé, and briefly review the CRM queue.
**KT401**  Convert from PopCard to RENTCafé CRM

- Thinking of switching from PopCard to RENTCafé CRM? This course is designed to help users understand the differences between the two systems. As you make the switch from PopCard to RENTCafé CRM, this course will help you identify areas of efficiency, educate you on the enhanced functionality, and will help facilitate a seamless transition.

**KT415**  RENTCafé CRM Leasing Workflow

- Join us as we review the basics of the Leasing Workflow within RENTCafé CRM. Learn how to identify prospects, review activity logs, select preferences, add occupants, create document shows, and select units. As we move through the leasing workflow we will discuss rental options, rentable items, concessions or leasing specials, completing an application, and adding charges. Finally, we will review how to submit an application for screening, approve or deny an application, as well as generate and execute a lease. This course should be attended by all associates using or contemplating RENTCafé CRM

**KT430**  RENTCafé Connect

- RENTCafé Connect is an extension of your office that captures calls beyond the limits of your onsite team. With a telephone call or Web chat session, residents can enter maintenance and service requests, process rent payments, and make balance inquiries. RENTCafé Connect interfaces directly with Voyager to create guest cards, applications, work orders, receipts, and general messages. Attend this course to learn how RENTCafé Connect can maximize your resident retention and make your marketing dollars go further than you ever thought possible!!

**KT440**  RENTCafé CRM: Managing Your Queue

- This course takes an in-depth look at the RENTCafé CRM queue. We will review how to respond to incoming leads, create new guest cards, schedule appointments, and avoid duplicate guest cards. You’ll understand when to follow up with residents and send automated emails. We’ll navigate through the follow up process and help you manage your leads quickly and efficiently.

**KT520**  RENTCafé CRM: Reporting

- Come take a look at your RENTCafé CRM reports! Understand ROI, conversion ratios, marketing sources, or listen to call recordings straight from your RENTCafé CRM reporting menu. We’ll take a deep dive into CRM reporting to help you better decide which reports are better suited to fit your needs.

**IMFG**  Investment Management Focus Group

- Join members of the Investment Management client support and development teams along with your peers to discuss industry best practices around investor relations, fund accounting, and administration, as well as investment and investor reporting, performance returns/attrition analysis, and more. We will also discuss the development track for future product releases.

**MA**  Investment Management New Development Preview

- Attend this course for a review of the most important changes to the Yardi Investment Management product suite in the past 6-12 months and a preview of upcoming changes in the next year. The course is a synopsis of the updates provided to the Investment Management Focus Group.

**MA030**  InvestorPlus

- Discover how Yardi InvestorPlus improves the effectiveness of your client-facing staff. This introductory course will cover how configurable, role-specific dashboards put investor and investment data at a fund manager’s fingertips as well as how 360° access to contacts, activities, leads, proposals, and investment opportunities aid the deal makers. Learn how to communicate with investors and track activity via Outlook integration, correspondence, and notes.

**MA150**  Introduction to Yardi Advanced Accounting

- This course covers how to produce consolidated financial statements above the property level. You will learn how to set up entities, build ownership structures, and create consolidation entries with eliminations. This course also includes minority interest and equity pick up rules as well as how to use segments for intercompany eliminations within the roll up hierarchy.

**MA200**  Introduction to Investment Management

- Automate the complex accounting transactions of fund management to dramatically reduce the analysis required by traditional accounting. Investment Management allows you to manage your wholly-owned assets, joint ventures, and other investment types for both small and large portfolio investors. Topics include setting up complex investment structures as well as tracking cash flows and capital activity between investor and investment.

**MA215**  Investment Management Standard Performance

- Our standard performance course will show you how to use calculator analytics to calculate and store performance returns for your properties and assets including portfolio returns. We will focus on NCREIF as an industry benchmark and how you can use the YSI calculator rule sets to generate these returns. **Prerequisite:** MA200 (Introduction to Investment Management)
**Modules**

**MA220* Investment Management Analytics & Custom Reporting**

This course goes into depth on how Investment Management analytics and reports gather investment accounting data and how to configure your own custom and specific IM report templates. The second half of this class covers the setup and use of investor contact management and YSR to generate investor-facing correspondence. Examples will include distribution notices, capital call letters, and investor summary statements.

**MA312 Advanced Features for Investment Management**

Learn how to configure the system and structures to facilitate multicurrency transactions, accounting, and consolidations through accounts and options, accounting books, legal entities, exchange rates, and translation and revaluation rules. We’ll also cover creating batch transactions to match specific exchange rate needs, constructing journal entry rollups to match desired reporting results, and calculating returns in investor or investment currency. Prerequisite: MA200 (Introduction to Investment Management)

**MA315 Investment Management Advanced Performance**

This course will focus on calculating and storing investor/investment returns in our IMKPI tables using capital transaction records from IM. We will cover returns in investor or investment currency and review how to calculate and store the various attributions (composites) required by your firm or your clients. The course will review GIPS methodology as well as creating your own investor/investment return calculations. Prerequisite: MA200 (Introduction to Investment Management)

**ABFFFG Advanced Budgeting Focus Group**

This session will take place in two parts. In part 1, listen to a panel of your industry peers as they discuss company best practices, implementations, and use of Yardi Advanced Budgeting & Forecasting. In part 2, join in an interactive session where you can help influence future product development. Attendance is limited to clients currently using the Yardi Advanced Budgeting & Forecasting product.

**MB† ABF New Development Preview**

Attend this session to learn about the new developments planned for the Advanced Budgeting, Forecasting and Valuations modules over the next 6–12 months.

**MB112 Budgeting & Forecasting**

Learn how to accurately and efficiently populate budget worksheets with projected values based on various sources, including historical GL or budget data, future-scheduled rent posting, recurring payables and journal entries, and market leasing assumptions. Course topics include re-forecasts, variance analyses, and analytic reporting during the budget period.

**MB120 Introduction to Advanced Budgeting & Forecasting**

This class will include a high level overview of the Advanced Budgeting & Forecasting module. We will walk through common budgeting processes as well as discuss best practices for the module. Topics will include an overview of how to manipulate your commercial revenue forecast, functions to help you gain efficiencies in forecasting expenses, features that will help you pull mortgage and job information into your budget, and will close out with some common reports. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB150 New Features in Advanced Budgeting & Forecasting**

As you move forward in your Voyager releases, you may not be familiar with all the new features and functionality that have been added to the Advanced Budgeting & Forecasting (ABF) module. This class will introduce you to these new features to help you increase your productivity, help with reconciliations and variance analyses, and make your budgeting process smoother and more time efficient. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB210 Introduction to Valuations**

This course will introduce you to Valuations - a powerful calculator used by asset managers and REITs to help you determine present values and IRRs of individual assets using a discounted cash flow model. We will also cover key reports for managing analyses, manual revenue/expense entry, and how to apply market assumptions like simple cap rate entry and general vacancy. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB230 Advanced Budgeting & Forecasting: Commercial Features**

This course will be a detailed dive into the revenue forecasting for commercial budgets and valuations. Topics include working with model properties and leases, refreshing model data with core unit and lease data, review and modification of leasing assumptions through the rent roll, setting up and modifying recovery information using the quick recovery tool, and linking market leasing assumptions (MLAs) to properties or units. We will also cover some of the commercial-specific reports available in the module. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module. Prerequisites: MB120 (Introduction to Advanced Budgeting & Forecasting)
MC120 Construction Setup  
This three-part course will cover all of Voyager Job Cost from setup to job close. A tentative guideline for topics in each session is: part 1 - core setup, categories, jobs, and budgets/ revisions; part 2 - contracts/COs, retention, JEs, reclass, and JCA's; part 3 - job lists, master job allocation, job cost adjustments, releasing retention, and job close. (3 part session) 

MC210 Construction Draws & Receivables  
This two part course will review construction AR features. We will cover setup of single and multiple funding sources, creating and submitting draw sheets, tracking receivables, income, and retention. (2 part session) 

MC240 Construction Reporting  
This course will teach how to use the Job Cost Analytics effectively, and show the most popular reports. We'll also have a discussion on custom job cost analytics and correspondence for creating contracts and request for payment. 

MC320 Construction Forecasting  
This advanced course will cover the Forecasting feature within the Construction module. Topics include calculating cost to complete and projected final costs, as well as cash flow forecasting by job. 

MG110 Legal Module  
Our legal module facilitates efficient management of standard legal activities by providing an easy-to-use framework to stay on top of legal deadlines and other related events. Learn how to set up legal records of various types, create legal notice events, track tenant legal history, and utilize reports. 

MI110 Overview of Yardi Inspection  
Yardi Inspection is a flexible tool for scheduling and managing all types of inspections at commercial, multifamily, public and affordable, government, military, student, single family, condo, and other properties. Clients can easily create custom inspection templates to suit unique business needs, assign inspections based on user-defined criteria, view detailed reports on inspection history, and more. This course will cover the setup and use of this module. 

MI350 Inspection: New Features & Committee  
Join this committee of Yardi Inspection product specialists, developers, and users to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added. 

MM Maintenance Roundtable  
Join this roundtable of Yardi Maintenance product specialists, developers, and users to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added. 

MM112 Voyager Work Orders  
This course covers how to use Voyager work orders to manage your maintenance tasks, staff, and materials. Other topics include basic work order capabilities and workflow, managing tasks, tracking inventory and labor, preventive maintenance, and posting transactions to the general ledger. (2 part session)
Join us to learn about Yardi Concierge, a tablet-optimized reservation system. This committee can assist you with guest relations, delivery notifications, guest authorizations, key authorizations, incident reporting, resident away notifications, and the reservation system.

Join this committee of Yardi Fixed Assets product specialists and developers to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added.

Join this committee of Yardi Fixed Asset product specialists and developers to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added.

In this demonstration, you will learn about an exciting product that streamlines utility billing. Yardi Smart Energy Suite is an automated utility management system that works with electronic invoice processing, providing an end-to-end solution with no interfaces to third-party systems. Yardi Smart Energy Suite works with master or submetered systems to provide a cohesive tool for managing your utility billing more efficiently.

In this session we will explore how decisions made during the Yardi Utility Billing and Yardi Utility Expense Management implementation process will affect utility vendors, recovery, conservation, Voyager financials, and reporting. We will cover key steps and how you can leverage the YES team’s expertise to take advantage of this energy management solution. Learn what you need to know to make informed decisions and set yourself up for success with Utility Billing and Expense Management. By adapting and following these best practices you will be able to experience smooth and streamlined utility billing and expense management services within your own Voyager database.

Join us for an interactive session where we will share our current roadmap for RENTmaximizer and gain your input on product enhancements. All current RENTmaximizer clients are invited to attend and bring suggestions and ideas for product improvements.

Participate in an interactive session where we invite you to share your experience with Yardi Orion Business Intelligence for Multifamily. All current Orion Business Intelligence for Multifamily clients as well as those interested in learning more about the product are invited to attend. Come prepared with your questions, suggestions and ideas for product improvements.

This focus group is intended to provide clients with an in-depth review of the renters insurance policy programs, and the compliance functionality and analytics available within Voyager. Clients will have the opportunity to share industry knowledge and experience to improve the program and Voyager platform. Attendance at this Focus Group is limited to clients using Yardi Renters Insurance.

This course will highlight the latest developments and roadmap of the Yardi Multifamily Suite of products. Attend to get a sneak peek at what is happening with Voyager Residential, the Yardi Marketing Suite (which includes RENTCafé and RENTCafé CRM), Resident Screening, Procure to Pay, and many more. This course will provide insight into other courses you may want to attend for more detailed information in each area.
**RM020** Yardi RENTmaximizer

Learn about Yardi’s approach to rental pricing, enabling you to realize the full benefits of revenue management systems. We will cover pricing methodology and term-based pricing, which allows freedom of choice while optimizing lease terms to smooth out expirations. This trends-based approach to pricing also allows you to recover costs and increase revenue using rules you define.

**RM040** Yardi Resident Screening Introduction

Attend this course to learn the basics of Yardi Resident Screening. Learn about the services we offer, our scoring model, and our approach to screening. We will also demonstrate our seamless integration to your Voyager platform and what is involved with implementing the system. The course also provides a comprehensive overview of the features, customization, and analytics that are available.

**RM045* Experian RentBureau & Yardi Resident Screening

Unlock the power of Experian RentBureau rental payment data at your communities. Experian RentBureau is the largest and most widely used database of rental payment information and currently includes data on more than 15 million residents nationwide. From identifying higher-quality residents and reducing skips to improving bad-debt recovery, learn how contributing and accessing rental payment history data via Yardi Voyager and Yardi Resident Screening can give you a distinct competitive advantage.

**RM070** Yardi Matrix for Residential

This course covers the use of Yardi Matrix as a decision-support tool that facilitates multifamily investment transactions by proactively identifying acquisition and new development candidates. Learn how our mapping technology enables you to visualize both the geography and your investment criteria. See how loan maturity information, detailed unit mix data, sales comps, rent comps, and NAA expense data can be used to estimate valuations and populate an acquisition model, enabling you to pick the needle in the haystack and avoid unproductive time in pursuing incompatible deals. (This course covers the same material as CM070)

**RM101** The Resident Lifecycle: Prospect to Past

This course is designed for beginners who are interested in learning about the lifecycle of a resident within the Voyager system. Course attendees will receive a basic overview of the leasing workflow, prospect/resident statuses, renewals, and final deposit accounting.

**RM116** Prospect Guest Card & Leasing Workflow

Want to save time and increase productivity by streamlining your leasing process? Examine the intricacies of Guest Card, Leasing Workflow, and Applicant Screening and how these components affect your occupancy.

**RM117** Streamlining Rental Rates

Learn how the tools provided in Voyager can help you update unit rents easily and efficiently. This course includes instruction on amenity-based pricing, leasing specials, hot sheets, and market surveys.

**RM160** ResidentShield Renters Insurance

Featuring guaranteed policy fulfillment for every resident, ResidentShield renters insurance allows you and your staff to easily manage renters insurance enrollment and compliance. This course provides an overview of ResidentShield renters insurance’s two options, ResidentShield HO4 and ResidentShield Master Policy Program, and will cover topics such as workflow, features, customization, and analytics.

**RM201** Introduction to Voyager 7S

Discover Yardi Voyager 7S, the company’s first cross-browser release. Learn how the new navigation features and ability to work on multiple platforms - from PCs to iPads - enhance the user experience. Discover the next generation of Yardi Voyager. (CM201 and PH201 will cover the same material.)

**RM205* New Residential Functions in Voyager 7S

This course is a review of the most important new features in the past 6-12 months and a preview of upcoming changes in the next year to core-Residential.

**RM210** Getting the Most out of RENTmaximizer

This session will cover best-practice settings for a wide range of areas including lease renewal pricing and the various options you have available to you. In addition we will cover demand indicators to give you an understanding of what may work best for your organization. Lastly, you will learn about new and little-known RENTmaximizer features.

**RM220** Residential Analytics

Learn the nuts and bolts of the Voyager operational reporting system by drilling into each section of the box score (availability, resident activity, and traffic) and understanding how they relate to your onsite success. Supporting reports covered will include Conversion Ratios, Unit Availability, Resident Activity, and Traffic Detail. We will also discuss the capability to store portfolio-level residential KPIs to use for custom reports.

**RM225** Lease Renewals

Voyager includes a number of functions that aid the time-consuming and important process of lease renewals. Topics in the course include lease proposal batches, lease expirations from the dashboard, bulk approvals, letters, processing renewals, scheduled renewals, and simple renewals.
Panel Discussions

RM230  Move-Ins & Transfers
Learn in detail the move-in process and how it affects occupancy and GL transactions. This course includes a review of all the system options that reflect how your organization handles security deposits, including the global, property, and unit type options, as well as the effects on physical occupancy (history tables). The course also covers troubleshooting of the move-in process and associated GL transactions.

RM235  Move-Out Process
Learn in detail the move-out process from beginning to end. Learn about notice, cancel notice, move-out, adjust move-out date, cancel move-out, deposit accounting, move-out statement, and adjust deposit account. This course also reviews accounting effects, unit type default move-out charges setups, and the effects on occupancy and history tables.

RM240†  Property Takeover & Conversion
When you’re taking over a property, what tools should you use? This course provides training on both the new Yardi to Yardi (Y to Y) tool, for when the property is coming from another Yardi database, and standard ETL Tools, for when the property is coming from a different system. Whether you are using the Yardi tools or conversions services, there will also be data validation involved. We will cover the common reports that should be used for validating your data.

RM250  Orion Business Intelligence for Multifamily
Discover how Orion Business Intelligence provides a browser-based business intelligence platform to report on your entire portfolio. This course will introduce the Orion BI platform that is built from your Voyager database. Topics covered include: the creation and use of interactive, configurable dashboards; dashboard content and KPI targets and thresholds; and basic product configuration. Learn how you can use Orion BI to see the trends and performance of your entire business with amazing ease and speed.

RM260  Yardi Resident Screening Best Practices
This course is geared towards current Yardi Resident Screening users looking to maximize their use of the platform. Learn about industry trends and recent product enhancements. The course also provides a brief overview of workflow, features, customization, and analytics. The session will conclude with a brief roundtable discussion about industry trends related to screening and what Yardi Resident Screening can do to help your company manage risk.

RM315  Late Fees
Learn the ins and outs of late fees. This session will include a comprehensive overview, covering setup options, configuring to run automatically at night, and market-specific setups.

RM340  Residential Best Practices
This course reviews recommended system configurations that optimize the performance of your Voyager system and new features that improve Voyager-related business operations.

RM350*  Customizing Orion Business Intelligence for Multifamily
Discover how Yardi Orion Business Intelligence for Multifamily can be tailored to deliver the specific metrics you need to track in order to improve and grow your business. Learn how to integrate custom data into Orion Business Intelligence, build custom metrics, and explore other customization techniques through examination of client-derived case studies. We will walk you through how to identify specific business needs, define necessary metrics, and build solutions using the toolset within Orion Business Intelligence.

Panel Discussions

PN130  The Voyager 7S Conversion Experience: Before, During, & After
7S is the latest and most advanced version of Yardi Voyager, leveraging software as a service (SaaS) technology and mobile capabilities. Listen to a panel of clients talk about their migration to Voyager 7S, its mobile access and applications, favorite new features, the move to SaaS, and how their business benefits from an ability to expand Voyager with new Yardi products and services.

PN180  Using RENTCafé: Insider Tips & Client Insights
Hear directly from other Yardi clients about their experiences with RENTCafé. You’ll have the opportunity to ask questions and learn about new tips and tricks developed by Yardi experts and your peers.

PN320  The Orion BI Experience: A User Perspective
Listen to a panel of clients discuss their experiences with Orion Business Intelligence. You’ll learn new tips and tricks developed by Yardi experts and your peers, and have the opportunity to ask questions of the panel participants.

PN340  Saving Time & Money with Procure to Pay
Clients using the Yardi Procure to Pay (P2P) suite of products will talk about how they save money and time with our centralized platform including automated procurement with Yardi Marketplace, vendor management via VENDORCafé, and invoice processing with Yardi PAYscan. Hear from clients who use the solution on a regular basis and take the opportunity to ask questions at the end of the session.

PN365*  Modernizing Your Traditional Training Program
How many times have you heard the phrase, “I should already know this because it was covered in class, but…”? Maybe it is time to rethink our strategies for transferring critical information to our employees. Join a panel of property management industry training professionals as they present ideas on transforming your traditional training program to include eLearning courses so that it will meet the learning needs of today’s busy workforce.
Peer Roundtables

RT150  Is Your Training Paying Off?  How to Analyze Training Effectiveness
The training you provide is valuable…but can you prove it? Learn how to evaluate your training efforts on a whole new level with key performance indicators and business driver metrics. Join your peers for a roundtable discussion of best practices and techniques to develop results-based training assessments to prove that your training initiatives have impact!

RT165  Driving Process Change
Moving your organization through the process of changing or upgrading software can be a daunting experience. Join this roundtable course to hear how other Voyager users have handled business process change, training, hardware upgrades, outsourcing and other decisions during their software migrations.

RT175  Social Media Roundtable
Implementing an effective and engaging social media strategy is a must-have in real estate. Join us for a roundtable discussion on current social media trends and best practices, while getting your toughest questions answered. We will explore how to use social media to optimize your marketing efforts, boost engagement, and build community online.

RT220  Planning for a Successful Implementation
Making the decision to change software can be a time-consuming and terrifying proposition. Now that you’ve made your choice, learn how to make the implementation process move as smoothly as possible. This session will be led by the managers of the Yardi Professional Services Group.

RT225  IT Project Management
When you manage an IT department there are always projects that need direction, many of which fall outside your field of expertise. This roundtable course will give you the opportunity to discuss techniques for IT project management with your peers. Why start from scratch when the problem has already been solved?

RT275  Evaluating Your Business Practices
Business process management (BPM) has seen increased interest during the past year, as organizations look to automate and streamline their processes so they can wring out costs and become more efficient. Organizations should gear their BPM initiatives to fit a purpose, such as continuous process improvement, competitive advantage, or business transformation. Attend this roundtable and discuss this important topic with BPM consultants and other Voyager clients.

RT410* Employee Retention Roundtable
Your employees are a huge asset. Discuss ways to retain them once they’re trained up and valuable.

RT425* Developing Your Workforce: Creating a Culture of Learning
Nurturing long-term employee development increases productivity, retention, and overall satisfaction. Join your peers for a roundtable discussion of how to create and leverage learning plans to foster employee development and avoid cognitive overload. Key to the success of learning plans is manager buy-in, so we’ll also discuss how to convert managers into partners who are an extension of the learning and development process.

RT430* Managing Tenant Risk
Join this conversation to discuss with your peers strategies for controlling tenant risk. Topics will include Resident Screening, incident management, renters or tenant insurance (residential and commercial), claims management, and workman’s comp insurance.

RT440* Integrating Existing & New Modules
Join other self-hosted and SaaS Select clients to discuss the complexities of migrating to Voyager 7S. Topics could include: workflow adaptation, compatibility/interoperability, sharing data with other function groups, and 7S vs. 6.0 components - compatibility, installing plugins, training staff, and creating a plan to get it all together.

PHA

PH010  Spotlight on PHA
Yardi’s PHA software contains many useful tools that can significantly increase your staff’s efficiency. This class will spotlight some of the recently-released product enhancements. Attend this class to learn about what’s new and what’s coming in the near future for the PHA products.

PH112*  PIC Next Generation
Learn about HUD’s PIC Next Generation project and its planned interface with Voyager. The discussion will include timelines, technology, and an update on Yardi’s progress.

PH135  Voucher Management System
Voucher Management System (VMS) is a cornerstone of HUD reporting for the Housing Choice Voucher program. This class will discuss the latest changes to VMS and explain the underlying logic that is used to determine how the report is populated.

PH145*  RENTCafé PHA: Waiting List & Application Management
This session will encompass the RENTCafé waiting list processes including initial entry into the system, managing communications with applicants, and generating waiting lists. This session will also discuss Yardi’s best-practice suggestions for successful online waiting list management.
PHA

PH146* RENTCafé PHA:
- Application Management & Save My Spot
  Learn how RENTCafé PHA can save your agency time and money by using online technology to manage and process waiting list purge and intake certifications.

PH147* RENTCafé PHA:
- Tenant & Vendor Management
  This course will provide a comprehensive overview of the RENTCafé PHA Tenant and Landlord Portals. Topics will include online rent payments, maintenance requests, and ledgers for tenants. HCV landlords will be able to manage bank accounts, and view inspection and payment history.

PH148* RENTCafé PHA: Online Recertifications
- This interactive class will give an overview of the latest in online recertification technology using Voyager and RENTCafé PHA. Learn how you can leverage Yardi software to significantly reduce costs and create efficiency. This session will include a Q & A with an existing RENTCafé PHA client.

PH161* Basic MTW Configuration
- This session is designed to introduce basic Moving to Work configuration and processing in Voyager. This class is ideal for those considering application to the MTW program.

PH201 PHA Overview & Planning for Voyager 7S
- This class will detail the steps involved in upgrading from Voyager 6 to 7S, including a review of training materials, timelines, testing, and key requirements.

PH211 PHA Setup & Configuration
- Attend this course to learn about the PHA setup options available in Voyager and how they impact day-to-day processing. This class will cover the basic configuration options with an emphasis on new settings within the Housing Authority Administration menu.

PH218 AdHoc .NET & FillDocs for PHA
- Learn to use the PHA AdHoc tool. This functionality enables the creation of ad hoc reports in Voyager using PHA-specific data. This class will highlight new integrated FillDocs tools to simplify the creation of letters in Voyager.

PH252* PHA Portability Updates
- This course will provide an overview of the latest changes in Portability for the Housing Choice Voucher program, including the incorporation of the Portability Streamlining Final Rule published in August of 2015.

PH256 Project-Based Voucher RAD
- This class will cover all of the elements of the Rental Assistance Demonstration (RAD) conversions in Yardi from Public Housing and Mod Rehab to Project Based Voucher 50058s (PBVs). This comprehensive class will cover ending participation in the Public Housing and Mod Rehab program, conversion to the new portfolio, and management of the tenants under the new program with an emphasis on RAD-specific requirements such as continued FSS, EID, and phase-ins.

PH290 PHA Potpourri
- PHA Potpourri provides an opportunity for clients to ask questions about the product that may not fit within the context of other classes offered at YASC. This class is always lively, covers a wide range of topics and is highly interactive.

PH345 PHA Demographics & HCV Forecasting Tool
- This session is a review of the newly-enhanced PHA demographics, which have been expanded to encompass all PHA program types as well as the new 2 Year HUD Forecasting tool. This class will review the process for generating the demographic data, as well as how to use the embedded tools to analyze and graphically represent the data. The 2 Year HUD Forecasting tool utilizes RFTA data to populate this critical HUD report to assist agencies in assessing leasing statistics for the Housing Choice Voucher program.

PHAU G PHA Users Group
- The Yardi PHA User Group is open to anyone utilizing the Yardi Public Housing products. Come network with fellow users, learn about the future of the products, and participate in a series of client-led sessions.

Reporting

RE050 Reporting Panel
- After a brief overview presentation, this will be a Q&A session with Yardi technical staff about the various reporting options available in Voyager. We will cover everything from simple Yardi scripting to high-end presentations available when using Yardi Orion Business Intelligence. We will also describe the customizations possible with analytics, SSRS, and our ad hoc and Excel tools - both YSL.Net and the increasingly-adopted YSR. We’ll help you make sense of the Voyager reporting options and guide you to the YASC courses you should attend, thus empowering you to make savvy technology reporting decisions.

RE060 Yardi Spreadsheet Reporting Overview
- Yardi Spreadsheet Reporting (YSR) is a Voyager technology that enables advanced report designers to create report packets of individual documents designed in Microsoft Excel or Word. This class will offer an overview of the capabilities of this product, and is designed to help you gain an understanding of how YSR can be used to create boardroom-quality reports.
RE110 Basics of Database Schema & SQL
- Do you want to learn more about SQL queries and the Yardi database structure but don’t know where to begin? Attend this course, which introduces you to the Yardi database tables and educates you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

RE160 Correspondence for Commercial
- Attend this course to learn about the commercial correspondence feature and how to generate invoices, letters, and statements. This feature is similar to Word mail merge in that a template is used to create an invoice, letter, or statement. Each template pulls specific information from the database.

RE161 Correspondence for Residential
- Use Correspondence for Residential to print or email letters and statements, or to correspond with your residents, property-wide! Unique templates that pull specific database information are used to produce property-wide letters or statements, saving you time and boosting overall efficiency. Attend this course to learn about the Correspondence feature and how to use it to generate all of the letters and statements you need.

RE170 Introduction to Custom Financial Analytics
- This course is an introduction to Yardi’s custom analytics and provides information on how to create your own financial analytic-type custom financials. Learn how to create Account Tree and Property Comparison templates using either standard or custom account trees. We will cover topics such as how to compare financial data from prior periods to the current period, and how to compare similar data across multiple properties. This course will also be available as a webinar, following YASC. See Client Central for details.

RE180 SSRS Basics for Non-Developers
- This course includes an introduction to Yardi scripting, writing SQL select statements, and the basics of modifying these scripts to interface with SSRS. The class will include a brief introduction to designing and writing RDLC reports. No previous knowledge of report writing is required.

RE220 Populating & Reporting on Standard Performance Tables
- Yardi Voyager includes standard out-of-the-box Residential and Commercial performance tables. Learn how to populate these tables and report off of these key performance indicators.

RE250 Using YSR for Custom Analytics
- Leverage the power of YSR and Microsoft Excel to transform Custom Analytics into boardroom-ready reports. This class will teach you how to turn reports created using the custom analytic engine into Yardi’s newest reporting technology, YSR.

RE261 Residential Tenant Letters, Notices, & Leases
- Are you still typing individual letters to your residents or using Mail Merge to send out late notices? This course will provide you with the tools needed to print every letter, notice, and lease direct from Voyager. Learn how to effectively use Property Packets, Correspondence, and FillDocs using standard templates.

RE270 Intermediate Custom Financial Analytics
- This intermediate course builds upon the Introduction to Custom Financial Analytics class (RE170). We will focus on the creation of templates for portfolio-based custom financial reports. Rethink how you analyze your portfolio - learn how to create property portfolio type templates to compare GL accounts between properties or summarized by property attributes, and leverage standard or custom account trees to create attributes comparison-type templates.

RE370 Advanced Custom Financial Analytics
- Custom Analytics in Voyager is a highly versatile report designer. Once you’ve mastered the basics of getting your custom report to screen, Excel, or PDF, move on and learn how to pull feeder data for arithmetical manipulation from other rows and columns, access the total from an account tree expansion, use the Rolling Month and Period to Date functions for deeper flexibility in your customization toolbox, and many other advanced features. We will also discuss tips and tricks for validating designs and correcting errors. Prerequisite: RE170 (Introduction to Custom Analytics).

RE405 Reporting Comparison between YSR & SSRS
- The two main, alternative technologies available in Voyager 7S for rendering boardroom-quality, custom reports will be reviewed and contrasted. Yardi support for custom reports written in Crystal is rapidly approaching end-of-life, so users who have made significant investments in custom Crystal reports could substantially benefit by understanding the pros and cons of each approach. This session is light on technical detail but seeks to educate managers as to how to select between the two approaches.

RE505 SQL Scripting
- This intermediate course will expand your knowledge of select statements, joins, and queries in SQL, the database language that is required for generating custom reports and performing data-mining with Yardi’s SQL scripting functions. Learning these functions will enable you to link tables and fields; convert data formats; and sort, total, compare, and count.
Reporting

RE540  Yardi Spreadsheet Reporting Technical Session

Yardi Spreadsheet Reporting (YSR) is an increasingly popular Voyager report rendering technology that enables designers to create packets of individual documents authored in Excel or Word. This class will offer a step-through of how to create a YSR report; how to draw data from both Yardi SQL scripts, as well as from the analytic engines of conforming verticals; an overview of the setup techniques for YSR, including how to establish runtime filters and mapping those into the component individual reports; how to use the Yardi Excel add-in to help design reports; a tips and tricks presentation and a review of some newish features in the latest 7S releases; and information about the documentation and how to learn more about YSR.

RE560  FillDocs

Use Microsoft Word to create, customize, and fill letters, notices, leases, and other compliance-related correspondence. FillDocs enables you to transition your letters and forms from PDF or Crystal reports to Word at your convenience. Many different documents can be assembled into a single print job. This course provides an introduction to FillDocs, with an emphasis on leases, letters, and statements. Prerequisite: RE505 (SQL Scripting)

RE575  Transitioning from Crystal to SSRS & YSR

Join this class to learn how to transition from Crystal to SSRS. We will address topics on needed software, converting your existing scripts, connecting SSRS to your database, identifying the SQL query, and the Yardi standards for the look and feel of this tool.

RE580  SSRS Basics for Developers

This course is an introduction to Yardi report writing using RDLC reports. We will cover the basics of the SSRS application, including the easy use of Yardi scripts to create new reports or customize existing ones. This course will focus on modifying Yardi scripts to interface with SSRS reports. Knowledge of Yardi scripting, as well as basic SQL, is assumed. Some examples of modifications are grouping, totaling, and additional formatting.

RE680  Advanced SSRS Features

This advanced course is designed for people who have been writing Yardi scripts for some time and are familiar with SSRS. Taught by example, the course will include topics on everything you ever wanted to know about drilling down (hyperlinks), passing parameters from scripts to SSRS reports, multi-data table reports, and sub reports.

Technology

TE025*  Introduction to Yardi Cloud

Ever wish you didn’t have to enter your credentials each time you accessed a Yardi resource? Do you wish there was a way to easily access all your Yardi applications in one place? If you answered yes, the Yardi Cloud might be for you! In this class, we will cover what the Yardi Cloud is, how to set it up for Voyager 7S, and what the user experience is like. If you’re a system administrator, or if you are interested in learning more about the Yardi Cloud, join us to learn about this new and exciting feature!

TE040*  Orion Document Management

Orion Document Management provides your company the ability to organize, control versions, store, and secure documents related to company departments or Voyager records such as properties, residents, tenants, jobs, etc. Use full text search to easily find documents based on the name of the document or the text within the document. Additionally publish documents such as tenant correspondence directly into the document management library.

TE130  Basic Voyager Menu Security

Learn the basics of Voyager menu editor and security. This course covers how to protect and restrict access to data by dividing your Voyager users into security groups, with each security group having a customizable menu set associated with it. Attend this course to learn how to set up security groups, individual users, user access, menu sets, and permissions.

TE140  Property Attributes & Dynamic Property Lists

Attributes provide a method for searching, selecting, organizing, describing, and classifying your properties or entities. Join us to learn about the set-up involved, as well as how to use attributes to filter reports and create dynamic property lists.

TE170  New Client Central

Client Central has long been a useful resource for clients to access training and technical information. This class is your opportunity to learn about our recent updates to the Client Central system. Learn how to access our extensive online Knowledge Base, including product documentation, training videos, and other resources. Find out how to create and monitor Yardi support cases and trouble requests (TRs), and manage your Yardi Cloud environment - from accessing performance statistics to implementing Cloud requests and approvals. We’ll also discuss how to administer your Client Central groups, users, and permissions.

TE171*  Client Central New Features

Since its upgrade last year, Client Central has been sporting brand new features approximately once every month. This class is your opportunity to learn about our most recent updates to the Client Central system. Learn how to turn on powerful add-on tools, including Online Ordering to update your license counts, ySQL and File Manager (reducing the need for a remote desktop session), and other resources. Find out about the new updates currently in development that will be coming out later this year.
TE180  User-Defined Fields & Custom Tables in Voyager 7S

Voyager 7S provides a variety of ways to customize information collected in the program and to personalize how it appears on the screen. Join us to learn how to enable User Defined Fields for storing additional data, as well as how to create custom tables to control the formatting, field requirements, and layout of a screen containing additional data.

TE210  Voyager Configuration

Maximize your efficiency by learning how to customize your database so that it contains information specific to your organization’s needs. Course topics include changing field labels and values, creating one-to-many tables, adding custom buttons, and more.

TE215  System Administration Toolbox

Become familiar with the features in the Yardi utilities toolbox. Learn what each tool does (and doesn’t do), and when to use it. The course also includes a demonstration of the toolbox’s reporting capabilities.

TE230  Transaction & Budgets Import/Export

In this course, we’ll discuss the methods for high-volume data entry of transactions through Voyager’s import and export functionality. This is an ideal approach for initial implementation of historical balances, importing trial-balance data from another database, creating transactions from data in an external system, and the importing of budgets across one or many properties.

TE240  Report Runner (Conductor.NET)

This course provides an overview of Report Runner, a back-end report server that replaces Yardi Conductor. Using Microsoft .NET functionality, it runs as a Windows service and offers improved performance over previous report-server versions. Learn how to configure, set up, and operate this utility, including server requirements, reports email processing, exporting reports to Excel and PDF files, batch reports processing, and scheduled analytics reporting.

TE245  Automated Tasks & Notifications

Learn how to set up automated email notifications and tasks based on critical dates or defined criteria. You can automate emails to any contact in the system, including tenants, vendors, owners, and employees. This Voyager feature displays assigned tasks on the user’s dashboard calendar and lets you track the completion date for those tasks.

TE250  Workflows & Workflow Notifications

Experience the full power of Voyager 7S workflows. Workflows are used in all modules and aspects of the Voyager 7S platform. This course explores the many versatile workflow options available. We will cover workflow basics, advanced workflow features, workflow automation, the workflow dashboard, workflow reports, workflow utilities, email templates, and notifications. (2 part session)

TE300  Advanced Voyager Menu Security

Optimize your existing knowledge of Voyager menus and security. This course covers security analytic reports, in addition to the menu editor and security functionality.

TE335  Advanced SQL Scripting

Yardi SQL scripts can be authored to accomplish much beyond simple reporting. This class will explore automating updates, imposing custom validation, using the system scripting tokens, exploiting the version section, and other advanced techniques. We’ll conclude with an open discussion to share tips and tricks discovered by the wizards of scripting.

TE360  Voyager Standard Interfaces Overview

This class will provide an overview of the 10+ interfaces currently available as part of the Voyager Multifamily license. Topics covered will include which interfaces are available, what services are provided by each interface, which third party agencies are qualified Voyager interface partners, as well as Voyager setup and configuration.

Vertical Markets

ASFG  Condo, Co-op, HOA Focus Group

Join members of the condo support and development teams and your peers from the condominium, co-op, and home owner association industries for an open discussion on best practices, strategies, training end users, the Condo Module progress update from our last Focus Group meeting, and what is in the development track for a future release.

AS050  Voyager Condo, Co-op, & HOA Demo

Representatives from Yardi Client Services, Development, and Sales guide you in discovering how time-saving features in the Voyager association module will help maximize office efficiency. Topics for discussion include correspondence, ad hoc, scheduled charges worksheet, special assessment worksheets, quick units, and quick owners functionality. Attend this demo to learn how these exciting tools can help you to gain more automation for the association management industry.

AS130  CONDO Café Portal & CONDO Café Certificates

Yardi’s paperless solution for homeowner and condo associations, CONDO Café Certificates, allows the association management to leverage their existing Voyager installation to quickly and easily prepare and sell certificates and other documents. We will also demonstrate CONDO Café Portal, which provides association owners and shareholders with the ability to check their real-time ledger balances, make online payments, create and check work order requests, and submit change request forms.
Vertical Markets

**AS220** Condo/HOA Violation Processing
- The Violation and Architectural Review Management dashboard allows users to easily manage violations from creation to closing, including the creation of inspections, charges, work orders, and documents. Yardi’s new violation app for iOS and Android will be demonstrated as well as general training on the lifecycle of violations through Yardi Voyager.

**SF055** Single Family Homes: New Features & Committee
- Join this committee of Yardi Single Family Homes product specialists and developers to discuss the new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added.

**SF155** Voyager Single Family Homes & RENTCafé Basics
- Voyager Single Family Homes works with our Marketing Suite to provide a seamless experience for both prospective and current residents. Learn how to manage prospects during the leasing process and how current residents can make online payments, enter work orders, and interact with your property staff via the resident site. Discover how to maximize your use of Voyager Single Family Homes.

**SN050** Senior Living Roundtable
- This session is an open forum for Yardi Senior Living-related topics. Yardi developers, account managers, implementers, and sales staff will be present to demo functionality and answer questions.

**SN101** Senior Living Roadmap
- Yardi’s Senior Living Suite contains many useful tools that can significantly increase staff efficiency. This class will spotlight some of the recently-released product enhancements. Attend this class to learn about what’s new as well as what’s coming in the near future for the Senior Living products.

**SS050** Survey of Self Storage
- Does your organization have Self Storage assets in its portfolio? If so, join this session to learn about Yardi’s exciting products that can help maximize your self storage profitability. This overview will include Self Storage-specific functionality available in both Genesis 2 and Voyager, as well as a presentation on Self Storage-specific market and research data available with Yardi Matrix. We will also take a look at the near-term roadmap for Self Storage management integration with other solutions supported in Voyager. Come learn how you can manage your entire portfolio, including Self Storage, with one powerful system.

**ST101** Student Housing: New Features & Committee
- Join this committee of Yardi Student Housing product specialists and developers to discuss the new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added.

**ST120** Voyager Student Housing & RENTCafé Student Housing Basics
- Voyager Student Housing works with our Marketing Suite to provide a seamless experience for both prospective and current residents and has been designed for the specialized needs of the student housing industry. Learn how to manage prospects during the leasing process and how current residents can make online payments, enter work orders, and interact with your property staff via the resident site. Discover how to maximize your use of Voyager Student Housing.

---

**Icon Legend**

- **BASIC**
  - Knowledge of the program or subject matter covered in the course is recommended before attending these sessions.

- **INTERMEDIATE**
  - In-depth knowledge of the program or subject matter covered in the course is recommended before attending these sessions.

- **ADVANCED**
  - Knowledge of the program or subject matter covered in the course is recommended before attending these sessions.

- **TARGETED FOR USERS**

- **TARGETED FOR EXECUTIVES**

- **SALES DEMONSTRATION**

- **INDUSTRY INFORMATION**

- **FOCUS GROUP**

- **NEW COURSE**

- **UPDATED COURSE**