

# COURSE DESCRIPTIONS



## ICON LEGEND

★ BASIC

★★ INTERMEDIATE

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

★★★ ADVANCED

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

○ TARGETED FOR USERS

❖ TARGETED FOR EXECUTIVES

⦿ FOCUS GROUP

● SALES DEMONSTRATION

⌘ INDUSTRY INFORMATION

⊕ NEW COURSE

■ UPDATED COURSE

## Accounting Cash Management

### EE120 CHECKscan

★

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

### EE260 Online Payment Processing

★★

This course will focus on one-time ACH and credit card payments made through RENTCafé. We will 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.

### EE280 Recurring Payments

★★

This course will focus on Payment Manager, our recurring payment system. We will cover the various setup options available and how payers can be signed up for recurring payments in Voyager. It will demonstrate the monthly recurring process, reports, and best practices for using automated recurring payments..

### EE330 Payment Processing: Advanced Topics ⊕

★★★

Attend this course to dive deeper into Payment Processing. We'll discuss how payments are processed, general payment processing tasks, and recommended parameters for Payment Processing. We'll also delve into more advanced topics, including closing the month and bank recs, reporting options and troubleshooting, and when and how to use Admin Utilities.

Follow the conversation!

**#YASC2018**

**EE340** **Managing CHECKscan +**  
★★★ This course will cover alerts (failures, NSF, other returns, and adjustments), how to use the Collect Processor report, and explain MICR. We'll also cover tips and tricks for installing scanners and CHECKscan best practices.

## Accounting Finance

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**AC050** **Financial Reporting Overview**  
○ Take a closer look at Voyager's financial reporting options! 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 a snap! 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 the 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. (Two-part session)

**AC165** **Segmented Accounting in Voyager 7S**  
★ Want to increase the detail of your financial reports without adding GL accounts to your Chart of Accounts? If so, GL segments may be the solution you are looking for! Using GL segments to record and store GL data in categories will enable you to add significant new details to financial reports. Please note: if you are planning to take the Voyager 7S Intercompany class (AC241), we strongly recommend this class as a prerequisite.

**AC210** **Account Trees: Introduction**  
★★ 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** **Automating Management Fees**  
★★ 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 learn 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.

**AC233 Automatic Bank Reconciliation +**  
★★ Do you do your bank reconciliation manually? Do you wish you could just load a file and get most of your work done in a matter of seconds? Then the Automatic Bank Reconciliation function in Voyager 7S is what you need! Come see a short demo of how the functionality works and how it can make your reconciliation a little speedier and easier.

**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 prepay issues.

**AC237 Month-End Tie-Outs: AR, Security Deposits, & AP**  
★★ Month-end can be a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks easily, smoothly, and without hassle.

**AC241 Voyager 7S Intercompany**  
★★ Learn about newly available intercompany functionality on Voyager 7S. These features track each relationship with a segment. The course will cover how to set up 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.

**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**  
★★★ Accounting features built into your Voyager software are designed to 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, and transaction processing. Learn how to apply accounting best practices to your Voyager system. (2 part session)

**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 Account Trees: Advanced Topics**  
★★★ This course will enhance the skills acquired in the introductory 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 totaling of financial statements to accommodate your organization's unique reporting requirements.

# Accounting

## Procurement

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### EP040 Bill Pay Overview

- 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, credit card, and ACH.

### EP050 Procure to Pay Demo

- This course provides an overview of Procure to Pay with emphasis on procurement, invoice processing, approvals, and payments. Within this system, PAYscan delivers consistent policies, eliminates paper invoices, and facilitates electronic invoicing. Come see the full transaction lifecycle, from PO to invoice to payment. If you're looking for ways to improve your AP process, this class is for you!

### EP080 Introducing VendorShield +

- Learn how VendorShield can help you to reduce operational and reputational risk. VendorShield is a comprehensive, full service vendor compliance and monitoring platform build into the VENDORCafé and Voyager workflows. The system features configurable criteria, reporting, and real-time, accurate compliance statuses to help you to "know your vendors".

### EP100 New Features Update: Procure to Pay ▣

- Learn about new features in the Procure to Pay set of products. This course reviews new key features of PAYscan, Marketplace, VENDORCafé, and mobile offerings. This course is intended for existing PAYscan and Procure to Pay users.

### EP135 Procure to Pay: 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!

### EP145 Procure to Pay: VENDORCafé Overview

- Learn how VENDORCafé provides a one-stop shop for better vendor management. Pay vendors faster, reduce the need for paper, cut costs, and get better results with VENDORCafé. Discover how to automate your onboarding process and proactively assess vendor risk across your portfolio.

### EP150 PAYscan Basics

- ★ PAYscan delivers consistent policies, eliminates the physical movement of paper, and facilitates electronic invoicing. View the full transaction lifecycle, from converting your paper invoices into electronic invoices, to approval and posting. Learn how to track, review, and process your invoices using PAYscan dashboards, and the PAYscan mobile app.

### EP220 PAYscan Performance Metrics & Operations Analysis

- ★★ With over seven years of product history and over 1,200 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? Can speed and accuracy go together (the answer is YES by the way)? See how you stack up against your peers and how to improve your company's operational performance.

### EP330 PAYscan & Procure to Pay Best Practices +

- ★★★ Learn setup and functionality best practices within Procure to Pay and gain more efficiency, cut costs further, and streamline your AP processing.

# Affordable

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AF060 **RENTCafé Affordable Housing Roundtable**  
❖ RENTCafé Affordable Housing provides extended resident and prospect portal features to affordable housing providers, residents, and applicants. 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 **New Features Update: RENTCafé Affordable Housing**  
★ RENTCafé Affordable Housing continues to evolve. Join us as we discuss the new waiting list functions within Site Manager, customizable compliance page narratives, and detailed reporting for your property management and compliance staff. [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]

AF125 **Family Self Sufficiency (FSS) \***  
★ This course will explore and demonstrate the features and work processes designed to manage Family Self Sufficiency agreements. [50059]

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)

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 Part 1: Setup

★★

As TRACS 203A goes live, HUD now requires that every repayment agreement and its status be reported to TRACS each month. This means that all repayment agreements must be managed in TRACS software (Voyager). This two-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in Voyager Affordable Housing. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the first of two sessions over which we will review setting up repayment agreements. [50059] (Part one of a two-part class)

## AF227-2 Repayment Agreements Part 2: Workflow

★★

As TRACS 203A goes live, HUD now requires that every repayment agreement and its status be reported to TRACS each month. This means that all repayment agreements must be managed in TRACS software (Voyager). This two-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in Voyager Affordable Housing. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the second of two sessions over which we will review setting up repayment agreements. [50059] (Part two of a two-part class)

## AF228 Repayment Agreements in TRACS 203A +

★★

With the release of TRACS version 203A next year there are some changes to the repayment agreement requirements. Join us to understand these changes and how Voyager will help with getting the necessary information into the TRACS database. [50059]

## AF231 Converting to TRACS 203A

★★

With the upcoming TRACS release 203A, this class will discuss how the new TRACS version may impact your policies and procedures as well as affect the way you interact with Voyager Affordable Housing. There will be some changes throughout Voyager; this is a way to get familiar with them to make your life easier during the transition. [50059]

## AF240 50059 HAP Voucher Best Practices

★★

HAP Voucher processing is a critical function for 50059 properties. Learn the best practices for posting, correcting, and auditing HAP vouchers in Voyager. [50059]

## AF253 Rural Development Best Practices +

★★

This course takes a closer look at Rural Development setup and workflows. The instructor will discuss necessary monthly and annual tasks that ensure continued compliance. [Rural Development]

## AF260-1 Affordable Housing Accounting Part 1: Setup

★★

Proper setup of affordable housing accounts is critical to the 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. [All Subsidy Types] (Part one of a three-part series)

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

★★

Proper monthly procedures can help 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. [All Subsidy Types]  
(Part two of a three-part series)

### AF260-3 Affordable Housing Accounting Part 3: Reports & Troubleshooting

★★

Voyager Affordable Housing receivable reports are designed to reflect the financial condition of affordable housing properties. Attend this course to learn about affordable housing 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. [All Subsidy Types] (Part three of a three-part series)

### AF280 Rental Assistance Demonstration (RAD)

★★

Since its introduction with TRACS 202D, the Rental Assistance Demo (RAD) program has grown to incorporate conversions from Rent Sup, RAP, and Mod Rehab subsidy types. In addition, HUD has changed phase-in rules and has introduced the concept of negative HAP. Join us for a discussion of these and other items as we explore RAD changes in TRACS 203A. We will talk about conversion scenarios and the use of new miscellaneous accounting request codes to be used for zeroing first year vouchers, billing for unit rehabilitations, and recovering negative HAP. [50059]

### AF286 RENTCafé Affordable Housing Waiting List Features +

★★

This course will explore and demonstrate the applicant experience using RENTCafé Affordable Housing to apply to the affordable housing waiting list. We will demonstrate various Site Manager tools including allowing applicant updates, sister property filtering, waiting list ranking, and moving from a waiting list pre-application to a full move-in application. [All Subsidy Types]

### AF287 RENTCafé Affordable Housing Site Manager: Admin Tools

★★

This course will cover advanced topics and features currently available in RENTCafé Affordable Housing. Join us to get an overview of unique tools and reports to enhance your property manager, resident, and applicant experience. [All Subsidy Types]

### 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]

### AF318 Affordable Housing Letters & Forms with FillDocs: Advanced Topics

★★★

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)

### AF335 Affordable Gross Potential Rent Report & Journal Entry ■

★★★

If tracking Gross Potential Rent (GPR) at your affordable properties is important to you, this course is a must. Course attendees will benefit from an explanation of the key affordable housing GPR specifications by program type, precise reconciliation processes, and steps to process the GPR journal entry posting. [All Subsidy Types]

### AF900 The MAT Guide

⌘

While all property managers are familiar with the HUD Handbook 4350.3, most property managers are not familiar with the Monthly Activity Transmission (MAT) Guide. Sometimes called the TRACS Guide, this resource provides you with detailed explanations about certification and voucher rules – it's not all technical mumbo jumbo. Join us to review this important resource. [50059]

### AF925 Converting to PBRA RAD +

⌘

This class provides information that will make transition to PBRA RAD much easier than it has been in the past. This class provides a summary of the latest PBRA Notice and explains the special nuances of this program. We will discuss special certification and voucher requirements including a discussion of how to handle residents with zero or negative assistance, how to handle rent phase-in, vouchers for the

year of conversion, and residents who have been relocated for rehab. Component 1 and Component 2 considerations are reviewed. (2-part class)

AF955

### VAWA MFH Rules +



Join us to discuss VAWA requirements and how they affect your day-to-day processes. We will discuss the VAWA-driven changes to the MI process, rejection, waiting lists, and resident notices.

AF980

### Streamlining & Implementing the FAST Act +



In December 2017, HUD published the interim final rule, modifying provisions in the streamlining final rule and implementing the FAST Act. The effective date of these

changes is March 16, 2018. While none of the new guidance is mandatory, HUD has created options to make certification and verification much easier. This is true for residents with fixed income, fixed income households, and households whose assets do not exceed \$5000. Join us for a review of these new rules. We will also discuss HOTMA, which HUD plans to implement in January 2019. (2 part class)

VAUG



### Voyager Affordable Users 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

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CM020

### Elevate for Commercial: Introduction +



Learn about this exciting new suite for commercial operations – leasing, development, engineering, and facilities. Although directly connected to Voyager, the Elevate applications have a user experience that is easy to use, engaging, and purpose-built for the operations teams of a commercial building owner. We will help you identify the target users and understand the value of Deal Manager, Facility Manager, Forecast Manager, Construction Manager, and Customer Manager.

CM030

### COMMERCIALCafé Tenant Portal: Introduction +



COMMERCIALCafé Tenant Portal is your company's online tenant services portal. Explore how you can provide tenants with best-in-class services 24/7 through access to online payments, tenant statements, maintenance requests, sales data entry, and other service offerings.

CM050

### Spotlight on Commercial & Investment Management



Join this course to learn about the Commercial Suite, designed to help reduce business cycle times and drive workforce efficiency.

This course provides a brief introduction to Advanced Budgeting & Forecasting, Leasing Manager (formerly Commercial LeasingPad), Orion Business Intelligence, COMMERCIALCafé, and Procure to Pay. We will also discuss the product roadmap for Investment Management, which includes InvestorPlus and Investor Portal.

CM061

### COMMERCIALCafé Marketing: Introduction



COMMERCIALCafé is your centralized platform to display and market your properties. Explore the many features of this solution, including having your own centralized listing repository with secure access for internal and external brokers, automated distribution of listings to top marketplaces, and creating a beautiful, modern web presence easily and affordably.

CM063

### Deal Manager for Commercial: Introduction



Deal Manager centralizes deal entry, tracking, and approvals in one simple-to-use solution for brokers and asset managers. Ideal for office and industrial clients, Deal Manager significantly improves the workflow of internal and external brokers, while providing enhanced deal pipeline visibility to asset managers. This



class will explore the solution's features and the benefits it can provide.

**CM065 Deal Manager: Development Roundtable +**  
○ In this session, learn about Deal Manager, see examples of streamlined leasing processes, and participate in the conversation about product directions and the roadmap. For context, Deal Manager centralizes deal entry, tracking, and approvals in one simple-to-use solution for brokers and asset managers. This software is ideal for office and industrial clients.

**CM070 Yardi Matrix for Commercial**  
● This course covers the use of Yardi Matrix as a decision-support tool that facilitates commercial 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 tenant information and available space, sales comps, estimate valuations, and population of an acquisition model enable you to pick the needle in the haystack and avoid unproductive time pursuing incompatible deals. (This course covers the same material as RM070 & SS070)

**CM090 Forecast Manager for Commercial: Introduction +**  
● Part of Yardi Elevate, Forecast Manager connects leasing, asset management, and finance teams to the budgeting process and eliminates back-and-forth emails and out-of-date assumptions. This class will explore the solution's features and the benefits it can provide.

**CM100 New Features Update: Voyager Commercial**  
★ 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 Voyager Commercial users, including financial reporting and tie-out, applying credits, commercial billing, management fees, closing the period, and more.

**CM140 COMMERCIALCafé Tenant Portal: Advanced Features**  
★ Learn how to deploy the COMMERCIALCafé Tenant Portal web app and the new tenant mobile app to your customers. Advanced features to be covered include payment processing and adding and removing features like concierge, notifications, documents, sales entry, and more.

**CM150 Setting Up Estimates & 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.

**CM180 Tax & Insurance**  
★ The Tax and Insurance function of 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.

**CM205 Commercial Best Practices**  
★★ Get the most out of your Voyager Commercial experience by utilizing best practices recommended by our Professional Services Group. Topics include commercial analytics, tasks and notification automation, report packets, custom tables, ad hoc reports, and more.

**CM231 Retail Solutions: Introduction**  
★★ Learn how to manage long-term retail leases in your database with lease administration in Voyager. This course will cover advanced administration tools for modifying, expanding, contracting, renewing, and re-measuring.

**CM240 Orion Business Intelligence for Commercial: Introduction**  
★★  
Discover how Orion Business Intelligence provides a browser-based business intelligence platform to report on your entire portfolio. This course will introduce the Orion Business Intelligence platform built from your Voyager database. 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 Commercial. 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.

**CM305 Commercial Best Practices: Advanced Topics**  
★★★  
Get even more out of your Voyager Commercial experience by utilizing best practices for special cases recommended by our Professional Services Group. Topics will include mixed-use property setup, attributes, GL segments, creative uses for Yardi leases, management fees, correspondence, and more.

**CM331 Retail Solutions: Advanced Topics**  
★★★  
This class will provide in-depth training on the powerful retail percentage rent calculations in Voyager, along with a review of retail sales reporting and other key retail features for malls, strip centers, and specialty and small shop managers.

**CM341 Orion Business Intelligence for Commercial: Advanced Topics**  
★★★  
Discover how 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 Commercial Recoveries: Complex Features**  
★★★  
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.

**CM355 Commercial Recoveries: Design Strategies Conventional & Advanced**  
★★★  
Learn how to set up the simplest CAM expense pools imaginable, including the NEW advanced recoveries expense pools (a.k.a. cost distribution)! This 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.

**CM360 Lessee Accounting: ASC 842 & IFRS 16 Accounting Standards**  
★★★  
New ASC (842) and IFRS (16) rules take effect at the end of 2018. These rules may affect your corporate leases and how they are booked on your financials. This includes setting up and then amortizing/depreciating your corporate leases on the balance sheet. Both ASC and IFRS allow for early adoption. Join us to learn more about these new rules and see how Voyager will handle the new rules.

# eLearning

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- eL040** ● **eLearning: Introduction**  
Find out how eLearning can improve your training program by bringing together fully-customizable Yardi software training with critical industry-specific topics, from fair housing compliance and safety courses to preventing sexual harassment and diversity training. Yardi's 5-in-1 tool combines the accountability, reporting, and efficiencies of a learning management system with a complete authoring tool set, graphics editor, file storage center, and event and webinar management system. Connect your university with HR systems and additional programs to fully automate your training for all onboarding and continued education. Elevate learning, save time, reduce errors, and improve training efficiency with eLearning.
- eL140** ★ **Rapid Content Creation in eLearning**  
Maximize your training ROI by fully utilizing our eLearning solution. Discover how easy it is to quickly develop custom courses and 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 in a clean, modern look.
- eL150** ★ **Getting Started with eLearning**  
Learn what it takes to get eLearning up and running for your company. We'll go over possible configuration options to customize the platform and increase the efficiency of your training program. 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 additional features available when you upgrade to a full eLearning University, such as notifications for both students and administrators to avoid daily reporting.
- eL155** ★ **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.
- eL160** ★ **Maximizing Effectiveness of Instructor-Led Training in eLearning**  
Maximize the effectiveness of all of your live events, whether they are delivered in-person or over the web using eLearning. Import your webinars from Citrix, Cisco, or Adobe to streamline meeting management tasks, such as meeting setup, registration, pre-event handout distribution, and attendance tracking. Add online tests that are distributed to all attendees at the conclusion of the event to capture knowledge retention and reinforce key learning objectives. We'll walk through the event process from creation to closing attendance!
- eL180** ★ **Creating an Effective & Sustainable Training Program with eLearning**  
Getting the most out of your employees means investing in your training program. Leverage eLearning to set them up for success. Learn how to design effective and sustainable training programs that start with solid learning goals and deliver curriculum using fully automated learning paths that guide your learners through material over time. With student notifications and automated reporting, you and your learners will always be up to speed. Identify and eliminate costly skill gaps by designing strategic custom training delivered through a highly customizable eLearning solution.

eL190 **Curating a Complete Training Resource Center in eLearning**  
★ Pull together all of your HR, IT, and business forms in a centralized, searchable location. eLearning Resources allows administrators to curate relevant content from a variety of sources and deliver it to specific groups of users that need it most. Deliver documents, embed third party social media tools, host digital content, market surveys, or link out to other websites. We'll take a look at all of these options and look at how to set them up in your eLearning University.

eL215 **Encouraging Performance Development Using eLearning +**  
★★ Support employee development with on-demand training and integrated administrative tools in eLearning. Strengthen core competencies by implementing certificate programs triggered by either employee enrollment or supervisor registration. Track progress with automated reporting sent to an HRIS or supervisor/admin inbox. Use private administrative notes and validation tools to document performance metrics, upload review documents, track knowledge goals, and provide in-platform feedback, all without leaving your university.

eL260 **Reclaiming your Work Day by Automating eLearning**  
★★ Gain valuable time in your day by automating training administration tasks in eLearning. Set up integrations with your HR system to automatically create and manage all of your user accounts, and leverage SSO to avoid the need for another set of usernames and passwords. Use Groups to automate the deployment of comprehensive learning plans that deploy new courses to your learners as they progress through the training program. Keep track of learning progress using automated notifications and scheduled reports. All of these time-saving tools will help streamline administrative processing, freeing you up for other tasks.

eL360 **Instructional Design and eLearning Course Workshop +**  
★★★ Take your course authoring to the next level in this two-hour workshop on instructional design techniques and considerations. Hear from eLearning Instructional Designers about best practices for starting a new project and the steps to take to ensure successful outcomes. Learn how learning objectives turn into storyboards and finally an engaging eLearning course. Take a hands-on approach during the second half of the workshop as participants build eLearning pages using the latest eLearning authoring tools: templates, interactions, shapes, color notes, and more. Can't bring a tablet or computer? Don't worry, we'll have you covered.

eLFG1 **Development Roundtable: eLearning Software**  
○ Whether you are new to eLearning or 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 are 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!

eLFG2 **Development Roundtable: eLearning Content**  
○ Have you taken an eLearning course? Or, are you interested in improving online learning? Whether you are new to eLearning or an experienced power-user, your ideas and opinions are extremely valuable for the success of our future content development. We'll take a look at our 2018 content development roadmap and share some of our latest in design methodology. We'd like to hear from you to help us guide our ongoing content development.

# Energy

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**EU045 Smart Energy Suite for Commercial Properties**

- Utility expenses are the largest source of operating expenses under your control. Discover how the Smart Energy Suite can help you reduce the administrative cost 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.

**EU050 Smart Energy Suite for Multifamily**

- In this demonstration, you will learn about an exciting product that streamlines utility billing. 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. Smart Energy Suite works with master or submetered systems to provide a cohesive tool for managing your utility billing more efficiently.

**EU130 E2 Insight**

- ★ This course is targeted for the multifamily and commercial markets. We'll discuss how Yardi's web-based energy and emissions tracking and reporting tool can provide you interactive, user-friendly energy and utility dashboards to track cost, consumption, cost recovery

through tenant billing, and emissions. We'll demonstrate several reports that provide a complete understanding of your buildings' energy consumption, helping you identify new ways to control usage.

**EU210 Utility Billing for Multifamily**

- ★★ This course demonstrates direct resident billing and online payment options for electric, gas, water, trash, and sewer invoices. We'll show you how Utility Billing can increase your operational efficiency while maximizing your cash flow. We'll also discuss how Yardi uses automated daily meter reads to provide real-time consumption alerts with daily monitoring of vacant units to prevent energy waste and theft.

**EU220 Utility Expense Management & ENERGY STAR Benchmarking**

- ★★ This course is targeted for both the multifamily and commercial markets. We'll demonstrate how Yardi uses smart analytics to automate and optimize your utility payables by monitoring consumption, identifying leaks, detecting invoice errors, and recovering overage charges. We'll also discuss how Yardi's ENERGY STAR and utility expense management (UEM) solution can load your utility consumption data into ENERGY STAR Portfolio Manager to ensure you comply with benchmarking regulations.

# Marketing

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**KT010 Marketing Automation with RENTCafé**

- ★ Evolve your business solutions by learning how to incorporate marketing automation into your day-to-day operations, minimizing redundant, head-down data entry and key strokes. This course will cover cutting edge marketing tools available through the Marketing Suite. Walk away with the power to create a better, more consistent customer journey.

**KT030 RENTCafé: Marketing Suite End-to-End +**

- This course will provide a live demonstration of the lifecycle from prospect to resident, within the fully-integrated Yardi marketing products. We will navigate through the RENTCafé Portals, discuss CRM integration points, touch on RENTCafé ILS, ResidentShield, Resident Screening, and RENTmaximizer as they relate to the online leasing workflow in RENTCafé.

**KT120**   **RENTCafé Prospect Relationship Management +**  
★ Join us as we take a deep dive into lead tracking with RENTCafé CRM. The training will be focused on queue management with a focus on the prospect lifecycle, and how to leverage the CRM tools available to boost your leasing initiatives.

**KT130**   **RENTCafé Marketing Website Best Practices +**  
★ This course will provide you with a fresh look on how to set up and maintain your marketing website. Learn more about easy-to-implement features that will give your property a strong online presence. We'll discuss all you need to know about how to capture your target audience with built-in and intuitive RENTCafé functionality.

**KT135**   **Call Automation & RENTCafé Connect**  
● RENTCafé Connect (formerly Yardi Call Center) 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!

**KT140**   **RENTCafé Resident Experience +**  
★ Learn more about the resident experience with a new perspective into Resident Portal. We will cover core functionality for resident services while tying in industry best practices. Through the eyes of a resident, you'll see how to register for online services, maintain an account, sign up for events, opt into text messaging, and more!

**KT155**   **Introduction to RENTCafé eDocs +**  
● This class is an overview of RENTCafé eDocs, a newly-released module for SaaS Select clients. This tool provides clients and account managers with a user-friendly method for creating and maintaining lease documents for RENTCafé.

**KT160**   **The RENTCafé Applicant Experience +**  
★ This course will teach you how to enhance a prospective renter's online experience. We will cover features available to customize and optimize the online application process for prospective applicants. Course attendees will gain a new perspective on how to boost prospect conversions, capture leases, and build a lasting relationship with qualified leads.

**KT170**   **RENTCafé Product Roadmap +**  
★ Be the first to hear about what's next on the priority list, straight from our RENTCafé development team. During this course, expect to see how RENTCafé will continue to be your one-stop shop with new, cutting-edge solutions. There will be something for everyone, whether you are using CRM, Prospect Portal, Resident Portal, or marketing tools within RENTCafé.

**KT180**   **RENTCafé Resources & Troubleshooting Basics +**  
★★ 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.

**KT205**   **RENTCafé Kiosk +**  
★★ RENTCafé Kiosk is the next big thing! Come explore a whole new method of engaging your prospects and residents with face-to-face interaction. This RENTCafé-integrated product will help simplify your daily operations.

**KT210**   **RENTCafé: New & Extended Features +**  
★★ This course will capture how to get the most out of your RENTCafé software. What's new? What's trending? We will cover the latest and greatest with RENTCafé and discuss our favorite features worth adopting into your workflow!

**KT225**   **RENTCafé Communication Management ■**  
★★ Learn how to stay connected with your residents and prospects. In this course we will go beyond the email management tool and explore SMS integration, text-to-pay, and voice messaging. We will cover everything from how to create email campaigns, recurring notifications, and customizing auto responders, to reviewing analytics and reporting.

**KT250**    **RENTCafé Leasing Workflow Scenarios +**  
★★    This class will take you through one-off leasing scenarios in RENTCafé CRM and related recommended best practices. We will discuss how to leverage the Central Leasing Office functionality to capture applicants, invite an applicant or roommate to register, merge two guest cards, promote a roommate, and many more real-world scenarios a paperless community should be equipped to handle.

**KT275**    **RENTCafé Resident Relationship Management +**  
★★    This class will coach attendees on how to maximize resident retention through RENTCafé Resident Services. You will leave this course feeling like an expert in extended features available in RENTCafé such as surveys, voice messaging, and RSVP event creation. We will also dive into analytics and reports so you can see the result of your marketing efforts!

**KT325**    **RENTCafé Marketing Strategy**  
★★★    This course looks at how to align your marketing initiatives with consumers' intent and expectations. We will review current trends in multifamily marketing, how to leverage powerful optimization features in Site Manager, and understanding the return on your marketing investment.

**KT350**    **RENTCafé Marketing Genius +**  
★★★    Walk out of this course knowing how RENTCafé empowers you to be a marketing genius. Let your online presence be the difference in your portfolio using RENTCafé tools like theme customizer, the new email marketing tools, media galleries, virtual tours, 3D floorplans, and more.

**KT375**    **RENTCafé Blue Moon Integration**  
★★★    The Blue Moon Online Leasing experience within RENTCafé just got even better! This course will cover the relationship between RENTCafé and Blue Moon, best practices for generating a lease, new features available in Site Manager and RENTCafé CRM, and Blue Moon configuration recommendations.

**KT390**    **RENTCafé Online Leasing Best Practices**  
★★★    This course is intended for individuals familiar with RENTCafé Site Manager and Online Leasing. The material will include an overview of online leasing-related settings, best practices, as well as dynamic features such as applicant invites, applicant grouping, and adding roommates to current residents with an online application. We will also cover customizing your workflow and the appearance of your online application.

## Modules

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**ABFFG**    **Development Roundtable: Advanced Budgeting & Forecasting**  
🕒    This session will be divided into two parts. In part one, the development team will preview new product features currently in progress and ask for client feedback. In part two, join in an interactive session where you can influence future product development.

**IMFG**    **Development Roundtable: Investment Management**  
🕒    In this session, the development team will preview new features of the Investment Management, InvestorPlus, and Investor Portal products, either recently released or on the near-term roadmap. Client feedback on product direction is encouraged.

**MA031**    **InvestorPlus: Business Intelligence Overview**  
●    This session will provide a quick look at how your firm's real estate and investment managers can quickly view asset, fund, and investor performance with intuitive, interactive, and graphical dashboards. Why run a static report when your users can easily change filter options to answer "what if" questions and get results in a snap? Download dashboards into presentation-ready Excel spreadsheets. InvestorPlus lets your team spend time analyzing information instead of managing data.

- MA032 InvestorPlus: Deal Tracking Overview**
- This session will provide a quick look at how InvestorPlus can help your organization track and manage investor and investment deals from beginning to end. Capture unlimited data points and view KPIs on interactive pipeline dashboards and reports. Configurable workflows with notifications keep teams abreast of key milestones. And when the ink is signed, automatically transfer speculative data into live.
- MA131 InvestorPlus: Business Intelligence +**
- ★ This course will demonstrate how you can use InvestorPlus to display key metrics on role-specific dashboards to respond to investor inquiries, consultant RFPs, or simply know your investment's performance at a glance. We'll cover at what levels dashboards can be used, the various charts and grids available to the user, and how users can interact with the data. Learn about special features such as crosstab financials, time-weighted returns options, weighted averages, Excel-based dashboards, and more.
- MA132 InvestorPlus: Investor Relationship Management & Deal Tracking +**
- ★ This course will demonstrate how InvestorPlus can help you manage investor relationships including prospecting, correspondence, and reporting. Learn how to leverage workflows and notifications to vet new investors or track potential investment opportunities. Create dashboards to display pipeline activity for acquisitions and disposition and drill into the underlying details.
- MA150 Introduction to Financial Consolidations**
- ★ 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. Yardi Investment Management allows you to manage your wholly-owned assets, joint ventures, and other investment types for both small and large portfolio investors. This double session will cover all of the major processes required to configure and create capital transactions including setting up complex investment structures and managing commitments going forward, transaction types, cascade rules, generating capital calls and distributions, tax withholding, partner transfers, income/MV allocations, management fee calculations, and reporting.
- MA220 Investment Management Analytics & Custom Reporting**
- ★★ This course will go into depth on how to leverage standard Investment Management analytics to view capital transactions in a variety of formats and how to create your own Investment Management templates for a multitude of purposes. The second half of this class will cover investor contact management configuration, how to use YSR to generate investor-facing correspondence, and how to leverage our Investor Portal for report distribution and tracking document downloads. Report examples will include distribution notices, capital call letters, and investor summary statements.
- MA300 Investment Management Performance**
- ★★★ Part one of this double session will show you how to generate IRRs and returns for your properties, assets, and portfolios. Using NCREIF as the industry benchmark, we will demonstrate how to configure your system for data submission, how to generate the components and returns using our core calculator analytics, and how to verify the results with standard YSR reports. Part two will focus on calculating investor/investment returns and equity multiples using capital transactions from Investment Management. With an eye on the GIPS methodology, we will cover how the program calculates time-weighted returns. Finally, we will show you how you can use the attribution analysis in InvestorPlus for composites and how to answer the "what if" questions posed by your clients and prospects.



**MA310 Investment Management: Advanced Topics**

★★★

This advanced course dives deeper into the Investment Management product for clients who have specific needs. Topics covered include share tracking, pro-rated income allocations, and commitment recalculations (all used for open funds), capital balance and time-weighted share percentage allocation, and revaluation processes (MV/FX). We'll also introduce preferred return accruals, return of capital, and distribution of excess funds.

**MB112 Residential 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 Advanced Budgeting & Forecasting: Introduction**

★

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 wrap up with some common reports. Note: this course will cover only commercial revenue forecasting tools (not residential) and is specific to the Advanced Budgeting & Forecasting product; it does not apply to the Budgeting & Forecasting module.

**MB150 New Features Update: 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.

**MB170 Advanced Budgeting & Forecasting: Reports**

★★

This class will go through commercial reports, financial reports, a number of variance reports, and our graphing reports. We will also be reviewing the reporting suite, where you can set up a batch of reports to run with a single process. These report suites can also be included in a function group. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB210 Property Valuations in Advanced Budgeting & Forecasting: Introduction**

★★

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.

**MB240 Advanced Budgeting & Forecasting: Reforecasting & Advanced Features**

★★

This course will cover functionality that will help you in the reforecasting process. We will review various features that allow you to move data into your budget or valuation, as well as best-practice recommendations. We will also review some of the more advanced features of Advanced Budgeting & Forecasting such as rollups, GL allocations, cash budgeting, functions groups, debt, and jobs. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB270 Voyager 7S Models & Formulas for Advanced Budgeting & Forecasting**

★★

Learn to wield new front-end formulas in Voyager 7S that increase the ease and accuracy of your budgeting process using our modeling tool. The tool deploys formulas that follow your business rules to calculate and populate accounts on your budget worksheets. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

- MB280** **Advanced Budgeting & Forecasting: Forecast Leasing Options**  
★★ This class will cover some examples of forecasting formulas, such as custom management fees and utilities with fixed percentage charges. In these examples, the Advanced Budgeting & Forecasting formula and model tools work together to help you quickly calculate amounts and post them to budget accounts. We will also review how to use the models with function groups for additional scalability. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.
- MC** **Development Roundtable: Construction**  
🕒 This two-hour session is conducted by the Construction Management development team and will showcase the latest features in Construction Management, including job costing. The session also features an open forum for questions on enhancements and future roadmap topics.
- MC020** **Construction Manager for Commercial: Introduction +**  
● Part of Yardi Elevate, Construction Manager provides real-time insight into the budget performance and revenue impacts of capital projects and tenant improvements. This class will explore the solution's features and the benefits it can provide.
- MC120** **Construction Setup**  
★ This three-part course will cover all of job costing in Construction Management, 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 JCAs; part 3 - job lists, master job allocation, job cost adjustments, releasing retention, and job close. (Three-part session)
- MC130** **Construction Manager for Commercial +**  
★ Construction Manager, part of the new Yardi Elevate suite of products, answers the question: are your jobs on-time and on-budget? Construction Manager provides complete project oversight to executives, development managers, and project managers. Risk assessment and milestones provide a much needed, non-financial insight to the status of your jobs.
- MC210** **Construction Draws & Receivables**  
★★ This course covers the construction draw and AR process. We will cover setup of single and multiple funding sources, creating and submitting draw sheets, tracking receivables, income, and retention.
- MC240** **Construction Reporting**  
★★ This course will give specific tips and techniques on using the job cost analytics functionality effectively. We will also have a discussion on custom job cost analytics and correspondence for creating contracts and requesting payment documents.
- MC320** **Construction Forecasting**  
★★★ This advanced course will cover the Forecasting feature within Construction Management. Topics include calculating cost to complete and projected final costs, as well as cash flow forecasting by job and the forecast integration to Advanced Budgeting & Forecasting.
- 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** **Inspection: Introduction**  
★ Inspection is a flexible tool for scheduling and managing all types of inspections at commercial, multifamily, public and affordable housing, government, and other property types. 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.
- MM020** **Facility Manager for Commercial: Introduction +**  
● Introducing a new UI and purpose-built application for chief engineers, technicians, and asset managers of commercial buildings. Learn about a streamlined and simple way to create equipment, maintenance plans, inspections, and work orders.

- MM112 Maintenance: Work Order Overview**  
★ This course covers how to use Voyager work orders to manage your day-to-day service requests, maintenance tasks, staff, and materials. We will review work order analytics, various dashboards, and the assignment to completion process of a work order.
- MM130 Maintenance Mobile: Overview & Setup +**  
★ This class will cover the configuration of Maintenance Mobile for both Android and iOS devices. Topics will include using the reassignment status as well as multi-technician work orders. We will also review recent updates to the app.
- MM157 Fixed Assets: Overview**  
★ This course details the Fixed Assets module. The instructor will review proper module setup and usage, including how to create fixed assets and how to calculate, post, and report on depreciation.
- MM170 Facility Manager for Commercial: Overview +**  
★ This course will introduce a new UI and purpose-built application for chief engineers, technicians, and asset managers of commercial buildings. Learn about a streamlined and simple way to create equipment, maintenance plans, inspections, and work orders.
- MM210 Maintenance Implementation & Setup**  
★★ This course will review the use of advanced features such as correspondence letters to tenants and vendors, as well as make-ready functions. We will also review the setup and usage of simple email notifications via the dispatch board, performance standards for response and completion times, and analytic reporting related to performance.
- MN110 NY Module Overview**  
★ Learn how the Voyager New York module assists your company in meeting DHCR regulations. We'll be demonstrating how to use the New York dashboard and process DHCR lease renewals, vacancy leases, annual rent registrations, rent bills, and comply with New York City health regulations. We will also incorporate affordable housing cross functionality in the end of the class.
- MN210 New Features Update: NY Module**  
★★ Join us for a demonstration of new and advanced features in the New York module such as MCI, IAI, and new standard reporting.
- MR050 Development Roundtable: Concierge**  
🕒 Join members of the Concierge support and development teams along with other clients currently using the Concierge products to discuss existing functionality and contribute your ideas and concerns for future releases.
- MR110 Concierge**  
★ Join us to learn about Concierge, a tablet-optimized module that is becoming increasingly popular. Learn how these features can assist you with guest relations, delivery notifications, guest authorizations, key authorizations, incident reporting, resident away notifications, and the reservation system.
- MR220 Concierge: RENTCafé & Advanced/New Features +**  
★★ Concierge functionality is also part of RENTCafé. Learn how residents can book amenities, view their packages, set away notices, identify their guests, and see who has been issued keys.

# Multifamily

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**MaxFG** **RENTmaximizer Focus Group**  
● 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.

**RM010** **Spotlight on Multifamily**  
★ This course will highlight the latest developments and roadmap of the Multifamily Suite products. Attend to get a sneak peek at what is happening with Voyager Residential, the 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** **RENTmaximizer Overview**  
● 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** **ScreeningWorks Pro: Introduction**  
● Attend this course to learn the basics of 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 & 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 Voyager and 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 & SS070)

**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.

**RM125** **Voyager Unit Pricing +**  
★ Voyager includes functionality with multiple methods for making changes to unit prices. Topics in the course include unit pricing updates such as market rent increases/decreases (with and without amenities), and unit type pricing updates with revenue management.

**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.

- RM210 Getting the Most out of RENTmaximizer**  
★★  
This session will cover best-practice settings for a wide range of areas including new features recently released for RENTmaximizer. Specifically, we will be covering new renewal options, residency length rules, new price rule weighting options, new reporting for renewal offers, and automated surveys.
- 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.
- RM230 Move-Ins & Transfers**  
★★  
Learn the move-in process in detail, 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 the move-out process in detail, 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, how do you manage the process, where do you start, and what tools should you use? This course provides an overview and discussion on how to manage the takeover process. We will cover logistics, an overview of tools, and validating your data.
- RM242 Y2Y Conversion Tool** †  
★★  
Simplify residential property takeovers from another Yardi database using the Yardi to Yardi (Y to Y) tool. This tool puts you in the driver seat to complete the process from beginning to end. We will cover the steps to export and import property data via XML, map chart of accounts and change codes directly in Voyager, and current and historical trial balances.
- RM260 ScreeningWorks Pro: Best Practices**  
★★  
This course is geared towards current 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 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 Orion Business Intelligence Setup for Administrators**  
★★★  
Are you currently implementing or planning to implement Orion Business Intelligence for multifamily? Join us to learn about what is involved with setting up and maintaining Orion Business Intelligence for multifamily companies. This course, designed for administrative users but informative for all, will cover setup and implementation steps followed by a dive into personalizing content for end users. We'll cover everything from user management to data configuration, ending with an introduction to our customization toolset.

# Panel Discussions

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**PN160** **Tips & Real Life Experiences with Advanced Budgeting & Forecasting**

❖ Listen to a panel of clients discuss their experiences with the Advanced Budgeting & Forecasting (ABF) functionality in Voyager. 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.

**PN225** **Insider Insights to Automating Utility Invoice Processing +**

❖ Join this session to hear a panel of clients talk about their experiences saving time and money using Utility Expense Management, an automated invoice processing solution for utility bills, built into Voyager. Learn how to capture invoice data, track missing bills, identify errors, obtain benchmarking analytics, and benefit from Yardi's expertise dealing with utility companies – all in one platform.

**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**

❖ Procure to Pay clients discuss how they save money and time with our centralized platform, including automated procurement with Marketplace, vendor management via VENDORCafé, and invoice processing with PAYscan. Hear from clients who use the solution on a regular basis and take the opportunity to ask your questions at the end of the session.

# Peer Roundtables

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**RT110** **New York Roundtable**

○ The New York real estate market has many unique specifications and requirements. Join us for a discussion of this marketplace and how Yardi software provides functionality to meet its needs.

**RT150** **Trainers' Roundtable**

○ Certifications... Do you currently use them? In this roundtable we will discuss certifications and how they can help employees in their career path while helping you increase your employee retention. We will have four main areas of group discussion: 1) topics, 2) roadblocks and incentives, 3) delivery method, and 4) planning and executing.

**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 and get 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 our Professional Services Group.

**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.

**RT430**     **Risk Management: Key Topics & Update**

❖ Join this conversation to discuss with your peers strategies for managing risk. Topics will include screening, incident management, vendor compliance, renters or tenant insurance (residential and commercial), claims management, and workman's comp insurance.

## Public Housing

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**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 to learn what's new and what's coming in the near future for the PHA products.

**PH112**     **HUD Update: 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.

**PH132**     **PHA Correspondence**

★ This exciting new functionality gives clients the ability to automatically attach key PHA reports to applicant, tenant, and landlord records within Voyager and RENTCafé PHA.

**PH146**     **RENTCafé PHA: Applicant 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.

**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.

**PH201**     **Voyager 7S Upgrades & Planning**

★★ 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.

**PH227**     **PHA Audit Reports & How to Correct the Data**

★★ There are a number of standard audit reports available in the PHA product to help clients monitor and manage exception cases. In this class we will review and discuss the purpose of many of these reports and point out what to look for on the reports. Where appropriate, we will guide you through the process to correct the underlying data. This class will provide you with an understanding of how to use the audit reports to monitor exceptions and ensure better overall operations.

PH239 **Opening Large HCV Waiting Lists: Best Practices**



This course will guide participants through the complexities of opening a large housing choice voucher waiting list and includes best practices, on-line application and notification procedures, as well as lottery options.

PH252 **PHA Portability Updates**



This class will introduce the latest, greatest updates to the portability functionality in Voyager. Highlights will include the new suspense account portability receipt and VMS changes.

PH315 **PHA Notifications, Tasks, & Email Templates**



The skills learned in this class can help standardize and automate communications, both internally and externally. Learn how to create standard email templates, schedule database tasks, and automatically send letters and reports using this valuable toolset.

PH320 **Managing PHA/Affordable Combination Properties**



This class will explore how to manage layered 50058/Tax Credit/HOME/Market properties within Voyager 7S. Topics covered will include the latest changes for identifying discrepancies in Tax Credit/PBV and HCV properties.

PH930 **HUD Update: UPCS-V**



Please join Yardi and HUD staff for an overview and update on the progress of the UPCS-V demonstration program. This session will review HUD's proposed changes to the Housing Choice Voucher protocols and a brief discussion of Yardi's future plans to incorporate those changes into the Voyager product.

PHAUG **PHA Users Group**



The PHA User Group is open to anyone utilizing the 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

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RE050 **Reporting Panel**



This class is a Q&A session with Yardi technical staff about the various reporting options available in Voyager. We will cover everything from simple Yardi SQL scripting to high-end presentations available when using Orion Business Intelligence. You'll also learn the degree of customizations possible with Voyager analytics, SSRS, FillDocs, ad hoc tools, and Spreadsheet Reporting. 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) enables advanced report designers in Voyager 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? This course will introduce you to the relevant database tables and educate you on 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**



Correspond with your residents, property-wide! Discover how you can use Voyager to print or email letters and statements. 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 Custom Financial Analytics: Introduction

★ 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.

### 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

★★ 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 Financial Analytics

★★ Leverage the power of YSR and Microsoft Excel to transform custom analytics into boardroom-ready financial reports. This class will teach you how to turn reports created using the custom analytic engine into Yardi's most exciting 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 directly from Voyager. Learn how to effectively use Property Packets, Correspondence, and FillDocs using standard templates.

### RE270 Custom Financial Analytics: Intermediate

★ This intermediate course builds upon the introductory 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 and 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 attribute comparison-type templates.

### RE370 Custom Financial Analytics: Advanced Topics

★★★ 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.

### 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.

**RE540** **Yardi Spreadsheet Reporting Technical Session: Part 1**

★★

Yardi Spreadsheet Reporting (YSR) is a well-adopted Voyager report-rendering technology that enables designers to create packets of individual documents authored in Microsoft 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 Excel add-in to help design reports; a tips and tricks presentation and a review of some newish features in the latest Voyager 7S releases; and information about the documentation and how to learn more about YSR.

**RE541** **Yardi Spreadsheet Reporting Technical Session: Part 2**

★★

A follow-on session to RE540, suitable for those tasked with designing custom reporting solutions with Yardi Spreadsheet Reporting (YSR). We'll include further demonstrations of newer features such as the filter report title values token, conditionally hiding columns in Microsoft Excel, and embedding database-sourced HTML in Microsoft Word templates. We'll also cover more general design tips including extending analytic data sources with custom tokens and creating a Word merge token file, as well as a number of suggestions for careful implementation of formatting. We'll show the rationalized setup screens for ease of

learning, and a newly-released generate screen supporting collapsible filter panes to enable more on-screen visibility in Voyager 7S.

**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.

**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 scripts to create new reports or customize existing ones. This course will focus on modifying Yardi scripts to interface with SSRS reports. Knowledge of 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

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**TE020** **Introduction to YardiOne**

❖

Ever wish you didn't have to enter your credentials each time you accessed a Yardi program? Do you wish there was a way to easily access all your Yardi applications in one place? If you answered yes, then YardiOne is for you! In this class, we will cover what YardiOne 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 YardiOne, join us to learn about this new and exciting feature!

**TE060** **Document Management for SharePoint: Introduction**

●

Introducing Document Management for SharePoint, a new integration for SharePoint in Office 365. This valuable tool helps you take advantage of your Office 365 investment and become a paperless office.

- 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 **Client Central Essentials**  
★ Client Central is our most useful resource for clients to access training and technical information. Learn how to access our extensive online resources, including product documentation and training videos. Find out how to create and monitor Yardi support cases and trouble requests (TRs), and manage your licensing. We'll also discuss how to administer your Client Central groups, users, and permissions.
- TE171 **Client Central New Features**  
★ Client Central is constantly evolving, 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, such as ySQL and File Manager (reducing the need for a remote desktop session), perform your own live-to-test restores, and new reports for our SOX clients. You will also hear about the features currently in development that will be coming out later this year.
- TE180 **User-Defined Fields & Custom Tables in Voyager 7S**  
★ Voyager users have many ways to customize information collected in the program and 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.
- TE215 **System Administration Toolbox**  
★★ Become familiar with the features in the 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.
- 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.
- TE265 **Document Management for SharePoint**  
★★ The new Document Management for SharePoint product helps you take advantage of your Office 365 investment and become a paperless office. Learn how this integration automates folder setup, tagging, and two-way data synchronization between Voyager and SharePoint. Give non-Voyager and external users quick access to property-level documents. Leverage the change management features and audit trails in SharePoint to secure your documents.
- TE310 **Voyager Menu Security: Advanced Topics**  
★★★ 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 **SQL Scripting: Advanced Topics**  
★★★ 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 standard interfaces currently available as part of Voyager. There are interfaces suitable for all management types as well as focused interfaces for multifamily, condo, commercial, student, and more. Topics covered will include which interfaces are available, what services are provided by each interface, which third part agencies are qualified Voyager interface partners, as well as Voyager setup and configuration. Come see new interfaces designed specifically for the commercial market.

# Vertical Markets

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AS050

## Voyager Condo, Co-op, & HOA Demo

●

Representatives from Client Services, development, and sales will help you discover how time-saving features in Voyager Condo, Co-op and HOA will help maximize office efficiency. Topics for discussion include correspondence, ad hoc, scheduled charges worksheets, special assessment worksheets, quick units, and quick owners functionality. Attend this demo to learn how these tools can help you to gain more automation for the association management industry.

AS100

## Voyager Condo, Co-op, & HOA Roundtable

○

Join members of the Voyager Condo, Co-op, and HOA support and development teams, along with peers from the condo, co-op, and home owner association industries, for an open discussion of topics such as new features, CONDOCafé, CONDOCafé Certificates, and future developments.

AS132

## CONDOCafé Portal for Condo/HOA Clients +

★

Learn about CONDOCafé, which provides association owners and shareholders the ability to check their real-time ledger balances, make online payments, create and check work order requests, and submit change request forms.

AS134

## CONDOCafé Certificates +

★

Learn how Yardi's paperless solution for homeowner and condo associations, CONDOCafé Certificates, allows the association management to leverage their existing Voyager installation to quickly and easily prepare and sell certificates and other documents.

CH020

## Corporate Housing Overview

★

Learn about the upcoming release of Corporate Housing, designed to allow operators to better interact with and manage corporate housing clients and tenants.

CO010

## Introduction to the KUBE Coworking Platform +

❖

This course will introduce you to KUBE, our recently-acquired coworking software. We'll discuss coworking spaces, terminology, and market forces before providing a demonstration of KUBE. Learn how KUBE provides e-commerce, CRM, billing automation, building automation and IT management, reporting, and more. We'll also cover the typical challenges encountered by coworking operators and how we solve for them. The session will wrap with time for your questions.

**ML130** **Voyager Military Housing & MILITARYCafé New Features**  
★ MILITARYCafé integrates with Voyager Military Housing to provide an online portal for both prospective and current residents. Learn how to manage prospects during the leasing process. We'll explain 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 Military Housing.

**MLFG** **Military Focus Group**  
🕒 Join this focus group of military housing product specialists and developers to discuss new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added.

**SF130** **Single Family Homes: RENTCafé & RENTCafé CRM +**  
★ RENTCafé Single Family Homes delivers improved workflows for applicants and leasing staff to easily track leasing prospects. Learn how to manage prospects during the leasing process and how current residents can make online payments, enter work orders, and interact with your staff via the resident site.

**SF201** **Single Family Homes: Best Practices +**  
★★ Voyager Single Family Homes has been optimized to meet the demanding needs of single family housing managers. Learn the standard operating procedures and latest features for this product suite to enhance productivity and prevent potential problems.

**SS070** **Yardi Matrix for Self Storage +**  
● 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 & RM070)

**ST120** **Voyager Student Housing Basics** ■  
★ Voyager Student Housing has been designed for the specialized needs of the student housing industry. Discover how to maximize your use of Voyager Student Housing.

**ST130** **RENTCafé Student Housing & CRM +**  
★ RENTCafé Student Housing provides 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.