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COURSE DESCRIPTIONS

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COMMERCIAL

Yardi Elevate Retail Manager: Part 1

Part of Yardi Elevate, Retail Manager is Yardi's all-new solution built for retail leasing, including space visualisation and specialty leasing functionality. This easy-to-use system will equip your leasing agents and property managers to handle all aspects of retail leasing.

(Part one of a two-part course)

Yardi Elevate Retail Manager: Part 2

Part of Yardi Elevate, Retail Manager is Yardi's all-new solution built for retail leasing, including space visualisation and specialty leasing functionality, all with flexible workflows. This course will continue the discussion of product features and functions that began in Yardi Elevate Retail Manager: Part 1. *(Part two of a two-part course)*

Yardi Elevate Deal Manager

Deal Manager centralises deal entry, tracking, and approvals in one simple-to-use solution for brokers and asset managers. Designed for the commercial market, 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.

COMMERCIALCafé Tenant Portal: Introduction

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

FACILITY MANAGER

Yardi Elevate Facility Manager: Part 1

Introducing Facility Manager, an optimised user interface for chief engineers, technicians, and asset managers of commercial buildings. Learn about this streamlined and simple way to track equipment and create maintenance plans, inspections, and work orders.

(Part one of a two-part course)

Yardi Elevate Facility Manager: Part 2

Continuing from Yardi Elevate Facility Manager: Part 1, this session will further review the use of advanced features such as planned preventative maintenance and inspection. We will also review the setup and usage of inspection templates and analytic reporting.

(Part two of a two-part course)

FINANCE

Using Segments and Segment Analytics

Introducing segmental accounting that enables adding granularity to accounting data. The session will feature various ways of defining segments and setting segment validation rules and various screens that support segments. Segment analytics enable you to slice and dice account balances based on various criteria.

Fixed Assets Accounting

This course details Yardi Fixed Assets. The instructor will review best practice configuration and how to create fixed assets, calculate, post, and report on depreciation. We will also review the reconciliation of the fixed asset register to the fixed asset accounts in the general ledger.

Bank Reconciliation: Bank Book

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.

End-of-Period Processing

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.

Intercompany Accounting

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, and intercompany reporting.

Yardi Utility Expense Management

Introducing Utility Expense Management that enables an efficient way of tracking utilities, the associated price structure and consumption details. Features tools to use the consumption data and create detailed invoices for tenants.

REPORTING

Orion Dashboards

Discover how Orion Business Intelligence can be tailored to deliver the specific metrics you need to track to improve and grow your business. Topics covered include interactive and configurable dashboards that show key performance indicators, history, and trending, as well as the use of Excel to create your own custom business intelligence reports. Learn how to integrate custom data into Orion Business Intelligence, build custom metrics, and explore other customisation techniques through specific examples for the commercial market.

PROCURE TO PAY

Purchase Orders and Service Contracts

Join this course to learn about the benefits of purchase orders in Voyager and the streamlining of purchase orders into a more standard and efficient process. This class will cover all aspects of using purchase orders and service contracts in Voyager. In the service contract session, you will learn how to manage recurring vendor contracts at agreed prices on a fixed schedule.

P2P Workflows

Learn how to set up powerful workflows enabling a paperless and transparent approval process. The session will discuss how to set up approval steps and conditional approvals.

VENDORCafé

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.

Yardi Elevate: Managing RFPs

Learn how to create and publish RFPs with Construction Manager. You'll learn how Construction Manager makes it easy to compare bids to budget, analyse cost variances, level bids, review responses, and ultimately award jobs. We'll also discuss how to facilitate every aspect of vendor engagement, communication, and bidding through self-service VENDORCafé.

INVESTMENT MANAGEMENT

InvestorPlus & Investor Portal

This course will demonstrate how InvestorPlus can help you manage investor relationships including prospecting, correspondence, and reporting. Learn how to capture notes or custom details about each investor as well as how to vet leads or track potential deals leveraging workflows and notifications. Finally, we'll show you how to publish documents and dashboards to your external investors through Investor Portal.

Investment Management: Investment Accounting

Investment Accounting allows you to automate simple or complex financial consolidations in line with the fund structure(s). Automating financial consolidation processes in Voyager significantly reduces time and effort needed to complete month-end, half-yearly, and year-end financial reporting. This session will cover the configuration of entity levels, entities, commitments, GL segments, GL books, account trees, rules, and rulesets. We will walk you through how to perform consolidations and generate financial analytics to review the consolidated results.

Investment Management: Investor Transactions & Unit Register

Automate the complex accounting transactions of fund management to reduce the time required with traditional accounting dramatically. Investment Management allows you to manage wholly-owned assets, joint ventures, and other investment types for both small and large portfolio investors, from one centralised platform. This session will cover all the major processes required to configure and create capital transactions, including setting up complex investment structures, managing commitments going forward, transaction types, cascade rules, generating capital calls and distributions, tax withholding, partner transfers, and how all of these are reflected in reporting.

BUDGETING & FORECASTING

Yardi Elevate Forecast Manager

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.

Advanced Budgeting & Forecasting: Introduction

This course will include a high-level overview of Yardi Advanced Budgeting & Forecasting. We will discuss how to manipulate your commercial revenue forecast, increase efficiency in forecasting expenses, and pull job information into your budget. We will also cover common reports.

Advanced Budgeting & Forecasting: Forecast Leasing Options (FLO)

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 advanced features of Advanced Budgeting & Forecasting such as rollups, GL allocations, cash budgeting, functions groups, debt, and jobs.

JOB COSTING

Job Cost

This session will provide a high-level tour of Job Cost functionality. There will be insight into creative uses of Job Cost, including advanced feature overviews and a discussion of best practices.

Yardi Elevate Construction Manager

Part of Yardi Elevate, Construction Manager shows job cost data in a new way for asset, development, and project managers. With the ability to track milestones, assign risk levels, calculate cost per square metre, and much more, this software takes job data to a whole new level. Vendor analysis and a bidding process round out the functionality available in this robust new product.