Accounting

AC050 **Financial Reporting Overview**
○
Take a closer look at the financial reporting options in Voyager. We will review each tool and hold a question-and-answer session to help 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 troubleshooting basics for the bank reconciliation feature in Voyager. We'll review the bank reconciliation exception report and discuss when and how to create adjustments. We will cover when to use the check book maintenance and unpost bank reconciliation functions and examine the importance of the merge deposit function in the bank reconciliation process.

This class list is subject to change at any time.

YASC
TWENTIETH ANNIVERSARY

San Diego, CA | October 16–18, 2019

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**

● **Product Demonstration**

⌘ **Industry Information**

✚ **New Course**

■ **Updated Course**

Follow the conversation!
#YASC2019

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? GL segments may be the solution you need! Using GL segments to record and store GL data in categories will enable you to add significant detail to financial reports. Please note: If you plan 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 the management fee functionality in Voyager and the enhancements it offers over the commission functionality. Learn how to let Voyager track and calculate your management fees, create recurring payables, and 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 complete an accounting month-end (AME) closure properly. You will learn the necessary steps 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, post GPR journal entry function, and their effects on the general ledger. Learn how to troubleshoot GPR tie-out issues and ensure accurate reporting of your financial position.

AC233 ★★ Automatic Bank Reconciliation

Do you perform bank reconciliations manually? Do you wish you could just load a file and get most of your work done in a matter of seconds? The automatic bank reconciliation function in Voyager 7S is what you need! See a demo of how the functionality works and how it can make your reconciliation a little speedier and easier.

AC237 ★★ Month-End Tie-Outs: AR, AP, & Security Deposits

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 in Voyager 7S. These features track each relationship with a segment. The course will cover setting up Voyager 7S-style intercompany, creating intercompany transactions with this setup, and intercompany reporting. You should have a basic understanding of segments before taking this class. AC165 (Segmented Accounting in Voyager 7S) is strongly recommended as a prerequisite.

AC245 ★★ Voyager 1099s

This course will review generating 1099s and the appropriate flags to set to create the records for 1099 reporting. We will also discuss general 1099 setup in Voyager.

AC250 ★★ Correcting Resident & Tenant Ledgers

Accurate resident and tenant ledgers are essential for successful property management. Attend this course to ensure accurate books and tie-outs. We will show how to identify and correct errors in tenant ledger balances and spot inconsistencies between ledger and receivable reports. This course does not cover 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 to the general ledger. We will address support for 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 in Voyager optimize user efficiency and ensure accurate financial reports. Join this course to learn about topics such as general ledger account setup, month-end procedures, charge code definitions, and transaction processing. Learn how to apply accounting best practices in Voyager. *(Two-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 user-defined percentages.

AC340 ★★★ Account Trees: Advanced Topics

This course will enhance the skills acquired in the Account Trees: Introduction course (AC210). In this supplemental class, attendees will learn how to set up complex 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.

Affordable Housing

AFSP ★ 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 that could help streamline your organization's processes.
[All Subsidy Types]

AF060 ❖ RENT*Café* Affordable Housing Roundtable

RENT*Café* Affordable Housing provides extended portal services for 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. [All Subsidy Types]

AF102 ★ RENT*Café* CRM Affordable Housing: Introduction +

Join us for an introduction to RENT*Café* CRM Affordable Housing. We will discuss the affordable-specific features of this CRM system, as well as the workflow when used with RENT*Café* Affordable Housing.
[All Subsidy Types]

AF112 ★ New Features Update: RENT*Café* Affordable Housing

RENT*Café* Affordable Housing continues to evolve. Join us as we discuss the new waiting list functions in Site Manager, customizable compliance page narratives, and detailed reporting for your property management and compliance staff.
[All Subsidy Types]

AF115   RENT*Café* Affordable Housing Applicant Workflow

★

Interested in automating your compliance interviews or allowing prospects to complete applications from anywhere? Check out this overview of RENT*Café* Affordable Housing from the applicant's point of view. See how easy accurate compliance interviews can be! *[All Subsidy Types]*

AF117   RENT*Café* Affordable Housing Resident Experience ✦

★

Interested in automating your compliance interviews or allowing residents to complete recertifications from anywhere? Check out this overview of RENT*Café* Affordable Housing from the residents' point of view. See how easy accurate compliance interviews can be! *[All Subsidy Types]*

AF135   RENT*Café* Affordable Housing Site Manager

★

This course will explore features and workflows that help you manage online applications. From initial applications to annual recertifications, the RENT*Café* Affordable Housing experience ties seamlessly into your Voyager software. *[All Subsidy Types]*

AF201   Affordable Housing Best Practices

★★

In this course, we will share the best practices our support teams have discovered while working with our clients over the years. We will discuss the tools in Voyager that help your company be more efficient and effective. *[All Subsidy Types]*

AF218   Affordable Housing Letters & Forms with FillDocs: Introduction

★★

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

★★

With TRACS 203A, HUD now requires that you report every repayment agreement and its status 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 the repayment agreement feature in Voyager Affordable Housing makes them easier. Users can track repayment agreements and associated expenses as well as monitor and forward collections to HUD automatically. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the first of two sessions that review setting up repayment agreements. *[50059] (Part one of a two-part series.)*

AF227-2   Repayment Agreements Part 2: Workflow

★★

With TRACS 203A, 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 the repayment agreement feature in Voyager Affordable Housing makes them easier. Users can track repayment agreements and associated expenses as well as monitor and forward collections to HUD automatically. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the second of two sessions that review setting up repayment agreements. *[50059] (Part two of a two-part series.)*

AF240   Best Practices for Vouchers

★★

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

AF260-1   Affordable Housing Accounting Part 1: Setup

★★

Proper setup and use of monthly procedures is critical in optimizing the performance of Voyager Affordable Housing. Attend this course to review accounting best practices, including basic setup, monthly processes, tools for troubleshooting discrepancies, and available affordable accounting reports. *[All Subsidy Types] (Part one of a three-part series.)*

AF260-2 Affordable Housing Accounting Part 2: Monthly Procedures

★★ Proper setup and use of monthly procedures is critical in optimizing the performance of Voyager Affordable Housing. Attend this course to review accounting best practices, including basic setup, monthly processes, tools for troubleshooting discrepancies, and available affordable accounting reports. *[All Subsidy Types] (Part two of a three-part series.)*

AF265 Ending Subsidy +

★★ Do you have a property where you no longer need to track compliance? Join us to understand how to turn Affordable Housing functionality off by property or by resident with this new procedure. *[All Subsidy Types]*

AF270 Tax Credit Best Practices

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

AF275 Income Averaging +

★★ As income averaging becomes more defined, Voyager Affordable Housing will help you stay in compliance. Join us to see how Voyager supports the new minimum set-aside election in LIHTC. *[Tax Credit]*

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 introduced the concept of negative HAP. We will talk about conversion scenarios and the new miscellaneous accounting request codes for zeroing first-year vouchers, billing for unit rehabilitations, and recovering negative HAP. *[50059]*

AF286 RENT*Café* Affordable Housing Waiting List Features

★★ This course will explore the applicant experience with RENT*Café* Affordable Housing waiting lists. We will demonstrate Site Manager tools, including 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 RENT*Café* Affordable Housing Site Manager: Admin Tools

★★ This course will cover current advanced features in RENT*Café* Affordable Housing. Get an overview of unique tools and reports to enhance your property manager, resident, and applicant experience. *[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 multiple documents into a single report package, as well as advanced FillDocs features. *[All Subsidy Types] Prerequisite: AF218 (Affordable Housing Letters & Forms with FillDocs: Introduction)*

AF911 Proposed Changes to Citizenship Eligibility Requirements with Mary Ross +

⌘ Don't believe everything you hear about citizenship eligibility changes. Join us to review the proposed final rule and some of the comments presented to HUD.

AF922 Policy Updates: It's Time to Take a New Look with Mary Ross +

⌘ Are you still using policies created in the 1990s? Key policies like TSPs are updated each year, but have you taken the time to see if other policies could use an update? Join us to share ideas about unit inspections, bed bugs, maintenance, and more.

AF935 HUD Voucher Reconciliation with Mary Ross

⌘ Do you, your CA, and HUD all have consistent information? Learn how to reconcile information for all three sources. Most importantly, make sure you're not missing any money.

AF937 **Gross Rent Changes
with Mary Ross**

⌘ Do gross rent changes give you heartburn?
We will go over GRC data entry, complying
with tenant requirements, and making the
transactions work in TRACS.

AF941 **Repayment Agreements:
Understanding HUD Clarifications
with Mary Ross**

⌘ While HUD Handbook 4350.3 and HSG
Notice 13-06 discuss the repayment
agreement process, the MAT Guide introduces
clarifications on the responsibilities of the
owner/agent, CA, and HUD.

AF951 **Overview of EIV Reporting
Changes with Mary Ross**

⌘ HUD issued a major update to EIV modifying
existing reports and adding a new analysis
report. Join us for a quick review.

Commercial

CMSP **Spotlight on Commercial
& Investment Management**

★ Join us following the General Session for a
fast-paced tour of the latest commercial
and investment management product suites.
Learn how Yardi Elevate can improve asset
performance by lowering costs, balancing risk,
and increasing revenue via in-depth operational
data and predictive insights with recommended
actions. We'll also touch on what's new in the
Commercial Suite, Pulse Suite (formerly the
Smart Energy Suite), and the Investment Suite.
We'll cover how these suites work with Yardi
Elevate to create a comprehensive and versatile
system for managing your commercial property
portfolio.

CM020 **Yardi Elevate for Commercial:
Introduction**

● Learn about this exciting new suite of smart
asset management solutions for leasing,
development, forecasting, and facilities
management that elevate asset performance
across office, industrial, and retail real
estate. Integrated with Voyager, the Yardi
Elevate products offer an easy-to-use and
engaging user interface for the operations
teams of commercial building owners. We
will help you identify the target users and
understand the value of Deal Manager,
Facility Manager, Forecast Manager, and
Construction Manager.

CM030 **COMMERCIAL*Café* Tenant Portal:
Introduction**

● COMMERCIAL*Café* Tenant Portal is your
company's online tenant service portal. Explore
how you can offer tenants best-in-class service
24/7 with access to online payments, tenant
statements, maintenance requests, sales data
entry, and more.

CM035 **Corporate Lease Manager:
Introduction +**

● Are you responsible for managing your
corporate leases? Come get a sneak peek at
Yardi Corporate Lease Manager – One solution
for all your corporate lease management needs.
Centralize all your lease data on one platform
and view/report via intuitive dashboards. Never
miss a deadline via automated alerts. Compute
and report FASB/IFRS compliant financials
for your entire portfolio. Bring all aspects of
lease management under one solution via
facilities and construction project management
features.

CM045 **Relationship Manager for Commercial: Introduction ✦**

● Relationship Manager is our new activity-centered CRM for commercial clients. Entire operational teams can communicate with each other through any of our Elevate apps, with a unified view of all activity in Relationship Manager. Know what's happening with your customers, your prospects, and your own team members—all in relation to your properties, deals, jobs, and other key Voyager objects.

CM063 **Yardi Elevate 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 product features and benefits.

CM075 **Yardi Elevate Retail Manager: Introduction**

● Part of Yardi Elevate, Retail Manager is Yardi's new solution for retail leasing with space visualization, specialty leasing, and flexible workflows. This easy-to-use system will equip your leasing agents and property managers to handle all aspects of retail leasing.

CM080 **Yardi Elevate Asset Intelligence for Commercial: Introduction ✦**

● Come get a sneak peek of Yardi Elevate Asset Intelligence, our next generation of commercial business intelligence software. Asset management teams gain real-time financial and actionable operational data to increase revenue and reduce cost.

CM100 **New Features Update: Voyager Commercial**

★ This course reviews the most important new features in the past 6 to 12 months as well as upcoming changes in the next year to 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, units, customers, leases, amendments, and other options. We will review the system's unique commercial view and leasing workflow. Attendees will learn the necessary setup fundamentals to fully use system features.

CM125 **Introduction to International Functionality ✦**

★ Is your company considering adding foreign assets to your portfolio? Yardi can help! In this introductory class we will discuss considerations and impact before adding those non-US entities to your database. We will highlight the project steps required and take a brief look at some of the functionality you can expect in your international deployment. We will also share our current support map and qualified ancillary products, as well as highlight exactly which countries Yardi is currently focused on providing official support for.

CM135 **Commercial Month-End Processes**

★ This course will review recommended month-end processes for Voyager Commercial users, including financial reporting and tie-out, applying credits, commercial billing, management fees, closing the period, and more.

CM140 **COMMERCIAL*Café* Tenant Portal: Advanced Features**

★ Learn about advanced features and processes in COMMERCIAL*Café* Tenant Portal, including steps to onboard new properties as well as managing and administering your tenant contacts. We will also highlight new and upcoming features.

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.

CM163 **Yardi Elevate: Deal Manager Overview & Roadmap**

★ Learn about Deal Manager, see examples of streamlined leasing processes, and join the conversation about product direction and roadmap. 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. *Prerequisite: CM110 (Basic Lease Administration & Setup)*

CM180 Tax & Insurance
★

The tax and insurance functionality in Voyager allows you to track tax parcels and insurance policies related to properties, vendors, customers, owners, and leases. It helps you manage your responsibilities and ensure that all tax liabilities are paid and insurance policies are up to date. *Prerequisite: CM110 (Basic Lease Administration & Setup)*

CM205 Commercial Best Practices
★★

Get the most out of Voyager Commercial using best practices recommended by our Professional Services Group. Topics include commercial analytics, task and notification automation, report packets, custom tables, ad hoc reports, and more.

CM231 Retail Solutions: Introduction
★★

Learn how to administer long-term retail leases in Voyager. This course will cover advanced administration tools for modifying, expanding, contracting, renewing, and re-measuring. *Prerequisite: CM110 (Basic Lease Administration & Setup)*

CM250 Straight-Line Rents
★★

Learn how to implement FASB 13 and automate straight-lining of rents in Voyager Commercial. This course will cover 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.

CM255 Automated Cash Application: Introduction +
★★

Increase your receipt matching rates with this new tool. Do you enter your receipt payments manually in Voyager? Do you wish you could have the receipt batch created and payments applied to outstanding charges automatically, before you come in? Automated cash application in Voyager 7S is what you need! This functionality supports your existing banking relationships or our optional full-service lockbox. See a demonstration and learn how this functionality can make your daily receipt payments quicker and easier. This functionality is designed for commercial property-centric portfolios.

CM305 Commercial Best Practices: Advanced Topics
★★★

Get more out of your Voyager Commercial using best practices for special cases recommended by our Professional Service 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. We will review retail sales reporting and other key retail features for malls, strip centers, and specialty and small shop managers. *Prerequisite: CM150 (Setting Up Estimates & Recoveries)*

CM341 Orion Business Intelligence for Commercial
★★★

Optimize and enhance your use of Orion Business Intelligence by learning how to integrate custom data, build custom metrics, and explore other customization techniques through specific examples for the commercial market. Additionally this class will review advanced topics in how to build interactive and configurable dashboards that show key performance indicators, history, trending, analysis, and the use of Excel to create your own custom business intelligence reports. This class is geared towards Orion Business Intelligence power users. For a more introductory course in business intelligence for commercial please consider CM080 (Yardi Elevate Asset Intelligence for Commercial: Introduction).

CM350 Commercial Recoveries: Complex Features
★★★

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

CM355

★★★

Commercial Recoveries: Design Strategies Conventional & Advanced

Learn how to set up the simplest CAM expense pools imaginable, including advanced recovery expense pools for cost distribution. This session will cover strategic options for expense pool setup, standardizing usage across the portfolio, and policies and procedures for using the CAM functionality in Voyager. We will discuss the pros and cons of conventional and advanced recoveries. *Prerequisite: CM150 (Setting Up Estimates & 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 lessee leases and how they are booked on your financials. This includes setting up and then amortizing/depreciating your corporate leases on the balance sheet. Join us to learn more about this new guidance and see how Voyager will handle the new rules. *Prerequisite: CM150 (Setting Up Estimates & Recoveries)*

Construction

JC

◎

Development Roundtable: Job Cost

This two-hour session with the development team will showcase the latest features in Job Cost and Yardi Elevate Construction Manager. It features an open forum for discussions on the overall development roadmap, future enhancements, and best practice Q&A.

JC020

●

Yardi Elevate Construction Manager for Commercial: Introduction

Part of Yardi Elevate, Construction Manager provides real-time insight into budget performance and the cost impacts of capital projects and tenant improvements. This class will explore the software's features and benefits.

JC120

★

Job Cost Basics

This two-hour session offers a high-level tour of Job Cost functionality. We will touch on setup and discuss creative uses of Job Cost, including general feature overviews and best practices.

JC130

★

Construction Manager for Commercial

Part of Yardi Elevate, Construction Manager shows job cost data in a new way for asset, development, and project managers. You can track milestones, assign risk levels, calculate cost per square foot, and more, taking your job data to a new level. Vendor analysis and a bidding process round out the functionality available in this new product.

JC210

★★

Job Cost Draws & Receivables

This course covers the construction draw and accounts receivable processes in Job Cost. We will cover setting up single and multiple funding sources, creating and submitting draw sheets, tracking receivables, and charge-back to tenants.

JC240

★★

Job Cost Reporting

This course will give specific tips and techniques for making the most of Job Cost reporting. We will review analytic reporting functionality, correspondence for creating contracts, and request for payment (similar to G702/703) documents.

JC310

★★★

Job Cost: Advanced Topics

This course will cover some of the more complex job costing scenarios in detail. Topics for SD 2019 will include Income contracts, master job allocation, and Construction Management Fees, including set up and transactions for these processes.

JC320 Job Cost Forecasting
★ ★ ★ This advanced course will cover the forecasting feature in Job Cost. 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.

eLearning

___

eL040 eLearning: Introduction
● Find out how eLearning can improve your training program by combining customizable Yardi software courses with critical industry 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 efficiency 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 automate your onboarding and continued education. Deepen knowledge, save time, reduce errors, and improve training efficiency with eLearning.

eL125 Online Communication
Made Easy with eLearning +
★ Maintaining contact with learners is essential to effective training. Learn how eLearning facilitates communication with learners throughout, from automated notifications to keep them informed of upcoming training to custom templated reminders that administrators and supervisors can send at the click of a button. Learn how to leverage hidden contact tools from reports, bulk contact functions, and facilitate feedback using eLearning surveys. The announcement functionality allows administrators to communicate with learners by group, so you can market new training opportunities directly on the student dashboard. eLearning also offers a variety of communication options between administrators. Learn how to use group chat, exchange ideas between course authors, and exchange private observation notes in the eLearning university.

eL140 Rapid Content Creation
in eLearning
★ Maximize your training ROI using our eLearning tool. Discover how easy it is to 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 assign courses automatically and empower supervisors to coach employees individually and run progress reports. We'll also look at additional features available when you upgrade to a full eLearning university, such as notifications for students and administrators to avoid daily reporting.

eL160 Maximizing Effectiveness
of Instructor-Led Training
in eLearning
★ Maximize the effectiveness of your live training 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 end of the event to track knowledge retention and reinforce key learning objectives. We'll walk through the event process from creation to closing attendance.

eL190 — Curating a Complete Training Resource Center in eLearning

★

Bring together your HR, IT, and business forms in a centralized, searchable location. The resource functionality in eLearning 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 to other websites. We'll discuss how to set up all these options in your eLearning university.

eL240 — Managing & Automating Learner Data ▪

★★

From account information to test scores, Yardi eLearning manages a significant amount of learner data. This course covers the types of account and learning data in the system and how you can manage it using manual and automated tools. We'll explore how to use import/export tools to keep user account information up to date and load external training records. We'll take a look at additional user fields and dynamic ownership to manage user group and supervisor permissions. Lastly, we'll take a look at automated reporting options to keep you and your supervisors informed of learners' progress.

eL280 — Strategies for Maximizing Learner Engagement ✦

★★

Engaged learners retain more information, which improves staff performance and reduces the need for additional training. Discover how to increase learner engagement using eLearning authoring tools. Learn how to build interactive eLearning courses that include engaging page elements and self-paced software tutorials. Design training programs that include touchpoints with supervisors, and use validation and eSign to track activity outside self-paced coursework. This course will get you ready to take your training program to the next level.

eL330 — Evaluating Learner Retention & Training Effectiveness ✦

★★★

Analyzing the effectiveness of your training begins with well-designed assessments. We'll explore assessment options in Yardi eLearning and how to deploy them to measure learner retention. We'll also look at eLearning surveys, a great way to collect training feedback across the platform. With reporting options from time spent per page to test attempts, Yardi eLearning tracks nearly every student action. We'll review key reports and data points that help you determine individual and group retention, so you can build the most effective training program possible.

eL340 — Advanced Authoring Tools & Techniques in eLearning

★★★

Take your course authoring to the next level by exploring advanced techniques used by Yardi's instructional designers. We'll discuss best practices for styling your custom courses and tools for designing visually impactful courses. We'll also review little-known authoring techniques, such as free drag formatting, snapshot revisioning, and page animations, all of which add a new look to your courses and increase learner engagement. Saw something you liked in one of our courses? Come with questions, and we'll show you how we did it.

eL380 — Advanced Super Admin Tools & Practices ✦

★★★

Are you a seasoned eLearning admin looking to take your skills to the next level? This course reviews lesser-known tools that can make your life easier and help you get the most out of the system. We'll cover best practices our team has found to make sure you don't miss a thing. Our eLearning service team is eager to show you their tips and tricks for optimal university performance and administrative efficiency.

eLFG — Development Roundtable: eLearning

◉

Whether you are new to eLearning or an experienced power user, your ideas and opinions are key to the success of our platform and content development. We are devoting some time during the conference to learn how you use eLearning to support your training initiatives. We'd also like to hear what aspects of the program you'd like to see us develop further. Pop in and share your ideas in person before leaving the conference!

Energy

EU045 Yardi Pulse for Commercial: Introduction

Learn how Yardi can help you gain unparalleled visibility into your energy demand and consumption across your portfolio. From utility expense management and real-time metering to powerful dashboards and AI-optimized buildings, the Pulse Suite can save you money and time while increasing the value of your portfolio.

EU060 IoT & Smart Homes

Your residents and prospects keep asking for smart home tech in their apartments, but where do you begin? Join us to explore the Yardi vision for a residential smart home platform. Increase revenue and resident satisfaction by giving residents the technology and user experience they want, without adding yet another niche vendor or app. Learn how you can improve system transparency and control with a residential IoT solution built on top of Voyager. Gain operational efficiency by incorporating smart technology into your leasing, community management, and maintenance workflows. The future is arriving, and we're thrilled to share it with you.

EU062 Success Stories: Utility Invoice Processing & Benchmarking

Are you tired of dealing with utilities and their invoice errors? Do you have multiple teams needing utility bill data but no time to validate or capture it all? We have the solution. Whether you are an energy manager researching consumption spikes, a sustainability professional looking to fulfill ENERGY STAR benchmarking requirements, a facility manager tracking the success of operational changes, or an asset manager assigning accountability for all of the above, our tools automate these processes and reduce late fees, so your staff can focus on more important things.

EU064 Success Stories: Utility Tenant Recovery

Are you recapturing as much utility cost as you should? Could your common area deduction be smaller? Would you like someone else to answer tenant calls about utility charges? This session explores best practices for tenant utility billing, legal compliance, and the automated recapture rate tools built into Voyager. Whether you need a complex rebill model that mimics the utility's tariff or just allocate utility costs based on submeter reads, our billing engine can handle your requirements with ease and includes a comprehensive reporting dashboard.

EU140 Yardi Pulse for Commercial Energy Management +

The Yardi Pulse Suite allows you to manage energy data and automate energy equipment. It supports your investment strategy and fulfills your business needs, all from one connected platform. See how Yardi Pulse helps you gain visibility into your utility data, reduce administrative costs, automatically run HVAC more efficiently, and make more informed business decisions with alerts, dashboards, and reporting.

EU150 Energy Management for Multifamily +

Join this course to learn more about maximizing utility cost recovery with solutions built into Voyager. Learn how a single connected solution for resident billing and online payment options can increase cash flow. See the benefits of managing your utility expenses with existing workflows for access to valuable data. We'll show you how to improve operational efficiency and your bottom line with built-in solutions for all aspects of energy management.

EU220 ★★ **Utility Expense Management & ENERGY STAR Benchmarking**
This course covers 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 show you how adding benchmarking services to Utility Expense Management lets us help you comply with benchmarking regulations and finance programs that require loading your utility consumption data into ENERGY STAR Portfolio Manager.

EU230 ★★ **Leveraging ENERGY STAR for Finance & Sustainability ✦**
Learn more about how to leverage your benchmarking data in ENERGY STAR to measure energy conservation measures, access discounted financing, and increase property values. Data used for complying with benchmarking laws can serve many other business purposes. If you have completed the hard work to set up ENERGY STAR and report on your properties, why not investigate the additional opportunities that may be available?

Forecasting

ABF040 ● **Yardi Elevate Valuation Manager for Commercial: Introduction ✦**
Determine the market value of existing commercial properties or the value of potential acquisitions and dispositions with this easy-to-use DCF tool that works with Advanced Budgeting & Forecasting. Quickly use market leasing assumptions to drive 10+ year forecasts and set assumptions to calculate current market value and cap rates.

ABF090 ● **Yardi Elevate 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 explores the product's features and benefits.

ABF120 ★ **Advanced Budgeting & Forecasting: Introduction**
This class gives a high-level overview of Advanced Budgeting & Forecasting. We will walk through common budgeting processes and best practices. Topics will include how to manipulate your commercial revenue forecast, functions to help you gain efficiencies in forecasting expenses, features that help you pull mortgage and job information into your budget, and some common reports. Note: This course covers only Advanced Budgeting & Forecasting for commercial revenue forecasting. It does not apply to residential Budgeting & Forecasting.

ABF170 ★★ **Advanced Budgeting & Forecasting: Reports**
This class goes over commercial, financial, variance, and graphing reports. We will review 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 Advanced Budgeting & Forecasting. It does not apply to residential Budgeting & Forecasting.

ABF240 ★★ **Advanced Budgeting & Forecasting: Reforecasting & Advanced Features**
This course covers functionality for your reforecasting process. We will review features that allow you to move data into your budget or valuation, as well as best-practice recommendations. We will also review complex features of Advanced Budgeting & Forecasting such as rollups, GL allocations, cash budgeting, functions groups, debt, and jobs. Note: This course is specific to Advanced Budgeting & Forecasting. It does not apply to residential Budgeting & Forecasting.
Prerequisite: ABF120 (Advanced Budgeting & Forecasting: Introduction)

ABF250 Advancements in Commercial Revenue Forecasting +

★ ★

This class covers the revenue forecast functionality in Advanced Budgeting & Forecasting and Yardi Elevate Forecast Manager. We will explore the user interface, using deals and market rates to drive your leasing options, space and area reconfiguration, and using MLA profiles to manage market rates. We will review revenue forecasting and key reports using Yardi Elevate Forecast Manager and the forecast leasing options of Advanced Budgeting & Forecasting. Note: This course is specific to Advanced Budgeting & Forecasting and Yardi Elevate Forecast Manager for the commercial market. It does not apply to residential Budgeting & Forecasting. *Prerequisite: ABF120 (Advanced Budgeting & Forecasting: Introduction)*

ABF270 Voyager 7S Models & Formulas for Advanced Budgeting & Forecasting

★ ★

Learn to use new front-end formulas in Voyager 7S that increase the ease and accuracy of your budgeting process using our modeling tool. Formulas follow your business rules to calculate and populate accounts on your budget worksheets. Note: This course is specific to Advanced Budgeting & Forecasting. It does not apply to residential Budgeting & Forecasting. *Prerequisite: ABF120 (Advanced Budgeting & Forecasting: Introduction)*

ABFFG Development Roundtable: Advanced Budgeting & Forecasting

◉

In part 1 of this session, the development team will preview upcoming product features and ask for feedback. Part 2 is an interactive session where you can influence future product development.

Investment Management

IM010 Why use Investment Management? +

●

Attend this synopsis session to understand why adding Investment Management to Voyager can help you reduce risk while increasing your business services. We'll explain how automating your capital transaction processing can reduce data errors and improve your investor reporting. Learn how much easier it can be to measure performance at the asset, fund, or investor level using this product, and why you'll never want to calculate investor distributions offline in Excel again.

IM020 Investment Management New Features: Investor Portal & CRM +

●

Impress your outside investors with the new, redesigned look and feel of Investor Portal. Even if you don't use Investment Management, you can give your investors easy, secure access to current investment positions, documents, and eSignature functionality. You will also get a sneak preview of our upcoming investor CRM product, which simplifies investor communications with updated activity tracking, contact management, correspondence, investor capital calls, and distribution processing.

IM132 Investor Relationship Management

★

Learn how to manage investor relationships including prospecting, correspondence, and reporting. Capture notes and custom details about investors and vet leads or track potential deals with workflows and notifications. Finally, we'll show you how to publish documents and dashboards to your external investors through Investor Portal.

IM135 Investor Portal ✦
★

How do you publish documents, correspond, and provide data for your external investors? Whether high net-worth or institutional investors, your customers need easy access to documents and current positions through an online portal with your company's branded look and feel. The latest version of Investor Portal automates and streamlines your process for providing documents. It includes an easy-to-use dashboard with investors' current positions in your portfolio and gives insight into potential opportunities in the pipeline. We will also discuss the portal admin utility that helps you manage your investors' access.

IM150 Financial Consolidations: Introduction
★

This course covers producing 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 pickup rules as well as how to use segments for intercompany eliminations in the rollup hierarchy.

IM200 Investment Management: Introduction
★★

Automate the complex accounting transactions of fund management and dramatically reduce the analysis traditional accounting requires. Investment Management allows you to manage wholly owned assets, joint ventures, and other investment types for small and large portfolio investors. This double session covers all major processes for configuring and creating capital transactions, including setting up complex investment structures and managing commitments going forward, transaction types, and cascade rules. We'll discuss generating capital calls and distributions, tax withholding, partner transfers, income/MV allocations, management fee calculations, and reporting.

IM220 Investment Management Analytics & Custom Reporting
★★

This course details how standard Investment Management analytics let you view capital transactions in a variety of formats. We will show you how to create your own templates for many purposes. We will cover investor contact management configuration, using YSR to generate investor-facing correspondence, and leveraging our Investor Portal for report distribution and tracking document downloads. Report examples will include distribution notices, capital call letters, and investor summary statements.

IM300 Performance Reporting & Attribution Analysis ■
★★★

Part 1 of this double session will show you how to generate IRRs and returns for your properties, assets, and funds. Using NCREIF as the industry benchmark, we will demonstrate how to configure your system to generate components and returns. We will set up dashboards in InvestorPlus for attribution analysis and composite reporting across your investment portfolio, allowing you to answer spontaneous what-if questions from your clients and prospects. This includes configuring your own key performance indicators (KPIs) and metrics to measure the health of your portfolio. Part 2 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 and build dashboards for attribution analysis across funds and investments.
Prerequisite: IM131 (Fund Performance Reporting with Dashboards)

IM310 Investment Management: Advanced Topics
★★★

This advanced course dives deeper into Investment Management for specific needs. Topics include share tracking, pro-rated income allocations, and commitment recalculations (all 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.
Prerequisite: IM200 (Investment Management: Introduction)

Maintenance

MI110 Inspection: Introduction

★ Inspection is a flexible tool for scheduling and managing all types of inspections at multifamily, public and affordable housing, government, and other property types. You can 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 setup and ongoing use.

MM020 Yardi Elevate 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 track equipment and create 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 Android and iOS devices. Topics will include 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 product. We will review setup and usage, including how to create fixed assets and how to calculate, post, and report on depreciation.

MM170 The Power of Preventative Maintenance: Facility Manager for Commercial

★ Facility Manager streamlines and simplifies planned maintenance scheduling and setup using equipment templates and automated scheduling tools. Our new user interface provides oversight of service requests, planned maintenance activities, and inspections across your portfolio. Get an overview of our new, easy-to-use mobile app for teams in the field that need to complete service request, preventative maintenance routines, and inspection tasks.

MM330 Maintenance: Work Order Advanced Features

★★★ This course will review advanced features, such as correspondence letters to tenants and vendors as well as make-ready functions. We will discuss the setup and use of simple email notifications via the dispatch board, performance standards for response and completion times, and analytic reporting related to performance.

Marketing

KT020 **RENT***Café* **Connect & Call Automation Demo**

● Generate revenue by increasing property occupancy and promoting resident satisfaction with RENT*Café* Call Automation. Tracking numbers for on-screen notifications automatically attribute a marketing source when a call comes in and populate the caller's number. You get a two-way conversational texting feature, automated emergency maintenance call-out, digital voice mail, and a five-point prompt phone tree. Users can build follow-ups for prospects, applicants, and residents in their respective lifecycles. Attend this course to make your marketing dollars go further than ever while increasing resident retention.

KT040 **RENT***Café* **Lease Docs: Introduction ✦**

● Learn about the new, powerful RENT*Café* Lease Docs! This course introduces you to Yardi's new lease library for specific states and jurisdictions. Currently we have leases for the largest states in the U.S., and lease forms for the remaining states are in progress. We will show you how the finished lease documents work for online leasing through RENT*Café*. The new interface is simple, intuitive, and creates a seamless process for your leasing staff, new residents, and lease renewals.

KT115 **Marketing Automation with RENT***Café*

★ Evolve your business by incorporating marketing automation into your day-to-day operations, minimizing redundant data entry and key strokes. This course will cover cutting-edge marketing tools available through the RENT*Café* Suite. Walk away with the power to create a better, more consistent customer journey.

KT120 **RENT***Café* **CRM Queue & Lead Management**

★ Join us as we take a deep dive into lead tracking with RENT*Café* CRM. The training will focus on managing follow-ups, queue management with emphasis on the prospect lifecycle, and what you need to know to boost your leasing initiatives.

KT125 **RENT***Café* **Communication ✦**

★ This course showcases the tools in RENT*Café* that help you stay in touch with your prospects and residents. We will tackle topics such as the difference between email autoresponders and email follow-ups or automated, one-off, and bulk communications.

KT130 **RENT***Café* **Marketing Website Best Practices**

★ This course takes a fresh look at setting up and maintaining your marketing website. Learn more about easy-to-implement features that give your property a strong online presence. We'll discuss all you need to know about capturing your target audience with intuitive, built-in RENT*Café* functionality.

KT135 **RENT***Café* **Call Automation & Chat ✦**

★ Learn how RENT*Café* Connect and RENT*Café* Call Automation increase prospect engagement and maximize resident retention by acting as an extension of your leasing office. Call Automation routes phone calls and chats to the appropriate team, whether it be RENT*Café* Connect call center staff, maintenance staff, your leasing office, or elsewhere.

KT138 **RENT***Café* **Prospect Discovery & Applicant Workflow ✦**

★ This course demonstrates the prospect lifecycle via Yardi's integrated marketing products. We will capture a lead through RENT*Café* ILS and complete an application using a RENT*Café* marketing site. We will discuss RENT*Café* Connect, Call Automation, scheduling a tour, RENT*Café* Kiosk, and more.

KT140 The RENT*Cafe* Resident Experience
★

Learn about ways to access our resident services through RENT*Café* Kiosk, RENT*Café* Connect, the RENT*Café* resident portal, Concierge, and even Amazon Alexa. Dive into the resident experience with a new perspective on core resident portal features, including an overview of lease renewals.

KT150 Streamlining Processes with RENT*Café* Lease Documents
★

Learn about the new, powerful RENT*Café* Lease Documents! This course introduces you to Yardi's new lease library for specific states and jurisdictions. Currently we have leases for the largest states in the U.S., and lease forms for the remaining states are in progress. We will show you how the finished lease documents work for online leasing through RENT*Café*. The new interface is simple, intuitive, and creates a seamless process for your leasing staff, new residents, and lease renewals.

KT155 Custom Lease Docs with the eDocs Toolkit
★

This class is an overview of RENT*Café* eDocs, a new tool for SaaS Select clients. Learn about a user-friendly method for creating and maintaining lease documents for RENT*Café*.

KT170 RENT*Café* Product Roadmap
★

Be the first to hear about what's next on the priority list for the RENT*Café* development team. See how RENT*Café* will continue to be your one-stop shop with new, cutting-edge solutions. There will be something for everyone, whether you are using RENT*Café* CRM, prospect portal, resident portal, or marketing tools in RENT*Café*.

KT180 RENT*Café* Resources & Troubleshooting Basics
★★

This course empowers you to use the tools and reporting in RENT*Café* Site Manager. You will learn how to troubleshoot common issues while reviewing frequently asked questions and techniques to answer them.

KT195 RENT*Café* Connect Implementation & Training ✦
★

The course will walk through the Call Center Café workbook and property page, detailing the services provided by the call center team. Learn how to use Site Manager for managing call center details in RENT*Café* Connect. Finally, we will touch on new features in the call center tools.

KT210 RENT*Café*: New & Extended Features
★★

This course shows you how to get the most out of RENT*Café* Site Manager and RENT*Café* CRM. What's new? What's trending? We will discuss useful features worth adopting into your workflow.

KT230 RENT*Café* Lease Management ✦
★★

Join us as we review the new RENT*Café* CRM leasing dashboards and best practices to manage applicants and residents throughout the leasing workflow. We will generate one-off documents, add pet addenda, send a guarantor signature request, review bulk countersignatures, add an occupant after lease approval, and review renters insurance and screening documents.

KT240 Optimizing the RENT*Café* Applicant Experience
★★

This course will review best practices to optimize your applicants' experience. We will review unit type mapping and organization, page narratives, application form customization and promo codes, site maps for rentable items, employment and address history, prospect-facing signature documents, revenue management integration, earnest money, and waitlist units.

KT275 RENT*Café* Resident Management from the Property POV
★★

This class will coach attendees on how to maximize resident retention though RENT*Café* and extended resident services tools. You will become an expert in NPS, referral campaigns, logging resident activities and tickets, creating and accepting renewal proposals, RSVP events, and more!

KT325 RENT*Café* Marketing Strategy
★★★

This course discusses how to align your marketing initiatives with consumers' intent and expectations. We will review current trends in multifamily marketing, powerful optimization features in Site Manager, and identify return on your marketing investment through lead attribution and just-in-time marketing.

This class list is subject to change at any time.

KT330 ★★★ **Enhancing ROI with RENT***Café* **Lead Tracking**
Learn how to track a prospect's web browsing journey with lead attribution and dynamic number insertion. We will review multitouch models, when to use them, and why. We will also show you how to use just-in-time marketing to optimize your marketing spend. You will leave this class with greater insight into your prospects' marketing journey and how to optimize your marketing efforts with RENT*Café*.

KT350 ★★★ **RENT***Café* **Advanced Marketing Features**
Find out how RENT*Café* empowers you to be a marketing genius. We will cover common marketing industry terms and how they relate to RENT*Café*. We will also show you extended marketing features such as 3D floorplans, virtual tours, A/B testing, local area marketing, SEO dashboard, interactive site maps, and more.

KT375 ★★★ **RENT***Café* **Blue Moon Integration**
The Blue Moon online leasing experience in RENT*Café* just got even better with Blue Moon Boost! This course will cover the relationship between RENT*Café* and Blue Moon, best practices for generating a lease, new features in Site Manager and RENT*Café* CRM, and Blue Moon configuration recommendations.

Other Modules

MG110 ★ **Voyager Legal**
Voyager Legal helps you manage standard legal activities efficiently with an easy-to-use framework for tracking legal deadlines and related events. Learn how to set up various legal records, create legal notice events, track tenants' legal history, and use reports.

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**
Learn about the tablet-optimized Concierge product. Learn how Concierge assists you with guest relations, delivery notifications, guest and key authorizations, incident reporting, resident away notifications, and reservations.

MR220 ★★ **Concierge New Features**
Concierge functionality is also part of RENT*Café*. Learn how residents can book amenities, view their packages, set away notices, identify their guests, and see who has been issued keys.

This class list is subject to change at any time.

Panel Discussions

PN160 ❖ **Tips & Real Life Experiences with Advanced Budgeting & Forecasting**
A panel of clients will discuss their experiences with Advanced Budgeting & Forecasting and answer your questions. You'll hear tips and tricks from Yardi experts and your peers.

PN225 ❖ **Insider Insights to Automating Utility Invoice Processing**
Hear a panel of clients talk about their experiences saving time and money using Utility Expense Management, our automated utility invoice processing platform 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.

Payment Processing

EE120 ★ **CHECKscan**
This course covers basic features of CHECKscan, including bank relationship setup, check scanning, and payer association. We will discuss daily routines, including checking the collect dashboard for NSF and returned items, and the collect processor report for the daily transmission of funds.

EE260 ★★ **Online Payment Processing for Receivables**
This course will focus on one-time ACH and credit card payments made through RENT*Café*. We will demonstrate the process of making payments online and how they are reflected on the ledger in Voyager and the resident services account. We will also cover signing up for recurring payments in RENT*Café*. Finally, we will review daily procedures and reporting.

EE280 ★★ **Recurring Payments for Receivables**
This course will focus on our recurring payment system. We will cover setup options and signing up payers for recurring payments in Voyager. We will demonstrate the monthly recurring process, reports, and best practices for using automated recurring payments.

EE330 ★★★ **Payment Processing for Receivables: 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. We'll also delve into advanced topics, including closing the month, bank recs, reporting options, troubleshooting, and when and how to use admin utilities.

EE340 ★★★ **Managing CHECKscan**
This course will cover alerts (failures, NSF, other returns, and adjustments), the collect processor report, and MICR. You will get tips and tricks for installing scanners and CHECKscan best practices.

Peer Roundtables

RT150   Creating an Effective
Mentorship Program
○
An effective mentorship program can help
participants achieve critical knowledge
transfer, improve performance, and increase
retention. Join Yardi, and other professional
trainers to discuss the key benefits of creating
a strong mentorship program.

RT175   Social Media Roundtable
❖
An effective, engaging social media strategy
is a must-have in real estate. Join us for a
roundtable discussion on 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.

RT365   COMMERCIAL*Café* Tenant
Adoption Strategies ✦
❖
Learn and share ideas with your peers on
strategies to encourage tenant adoption of
COMMERCIAL*Café* Tenant Portal. Benefits
of tenant adoption for your company include
lower property management expenses
related to work order administration and
rent processing, as well as increased tenant
satisfaction.

RT430   Risk Management:
Key Topics & Update
❖
Discuss strategies for managing risk with your
peers. Topics will include screening, incident
management, vendor compliance, residential
and commercial tenant insurance, claims
management, and worker's comp insurance.

PHA

PHSP   Spotlight on PHA
★
Voyager PHA contains many useful tools that
can increase your staff's efficiency. This session
will spotlight some recently released product
enhancements.

PH100   PHA Updates
★
Discover how the power and flexibility of
Voyager PHA can streamline your PHA
management tasks. This introductory course
covers important PHA functionality differences
between Voyager 6.0 and 7S.

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.

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

PH143   PHA Best Practices:
Application Management ✦
★
This class will discuss best practices for
managing waiting list applications with
Voyager and RENT*Café* PHA. We will discuss
effective application and communication
management, best practices for purging, and
how to initiate and schedule eligibility packets.

PH147 RENT*Café* PHA:
Landlord & Tenant Portals
★
Get a comprehensive overview of the RENT*Café* PHA tenant and landlord portals. Topics will include online rent payments, maintenance requests, and tenant ledgers. HCV landlords can manage bank accounts and view inspection and payment history.

PH149 PHA Best Practices:
Recertification Processing +
★
Recertifications are an integral part of an agency's daily activities. This course shows you how to use Voyager and RENT*Café* PHA to recertify families effectively and efficiently. Topics will include best practices for reporting, online recertifications, streamlining verifications, and communications with participants.

PH161 Basic MTW Configuration
★
This session introduces basic Moving to Work configuration and processing in Voyager. It is ideal for those applying for MTW status under the MTW Expansion.

PH215 PHA Financial Features
★★
This session covers key financial features of Voyager PHA. Topics will include tenant repayment agreements, landlord and tenant overpayments, and other features.

PH230 FSS Accounting +
★★
This class will explore the dynamics of financial accounting and reporting for the PHA FSS program. Key topics will include interest allocations, reporting changes, and property transfers.

PH236 Portability Tracking: Port-in ▪
★★
Attend this course to learn about setup and ongoing management of families that port into your jurisdiction. This includes adding the Type 4 50058 and the HUD-52665 Part I record, monthly billing, and steps needed once your PHA decides to administer or absorb this voucher.

PH237 Portability Tracking: Port-out ▪
★★
Attend this course to learn about setup and ongoing management of families that port out of your jurisdiction. This includes the move-out, adding Type 5 50058 (or DLE), and managing the 52665 Part II-B from the receiving PHA. We will also review the setup and management of the receiving PHA and monthly payments.

PH239 HCV Waiting List Openings
★★
This course will cover the complexities of opening a large Housing Choice Voucher waiting list with best practices, online application and notification procedures, and lottery options.

PH248 PHA Best Practices:
Unit Transfers +
★★
PHA portfolios can have unique transfer challenges. Learn about Yardi's best practices for unit transfers.

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

PH320 Managing PHA/Affordable
Combination Properties
★★★
This class will explore how to manage layered 50058, tax credit, HOME, and market properties in Voyager 7S. Topics will include the latest changes for identifying discrepancies in tax credit/PBV and HCV properties.

PHAUGO PHA Users Group
The PHA user group is open to anyone using our PHA products. Network with fellow users, learn about the future of the products, and participate in a series of client-led sessions.

Procure to Pay

P2P040 **Bill Pay Overview**

● Attend this session to see how Yardi can be your vendor payment service with a new addition, Bill Pay. We facilitate payments to your vendors, owners, and tenants via physical checks, credit card, and ACH.

P2P050 **Procure to Pay Demo**

● This course gives you an overview of Procure to Pay with emphasis on procurement, invoice processing, approvals, and payments. The PAYscan component supports consistent policies, eliminates paper invoices, and facilitates electronic invoicing. Come see the full transaction lifecycle from purchase order to invoice to payment. If you're looking for ways to improve your AP process, this class is for you!

P2P080 **Introducing VendorShield**

● Learn how VendorShield can help you reduce operational and reputational risk. VendorShield is a full-service platform for vendor compliance and monitoring built into VENDOR*Café* and Voyager workflows. It features configurable criteria, reporting, and real-time, accurate compliance statuses to help you to know your vendors.

P2P100 **New Features Update: Procure to Pay**

○ This course reviews new functionality in Procure to Pay, including PAYscan, Marketplace, VENDOR*Café*, Bill Pay, and our new RFP management functionality. This course is intended for existing Procure to Pay users.

P2P120 **Making the Most of PAYscan Full-Service Functionality**

★ Learn how PAYscan Full Service can help you spend less time scanning and entering invoice data. We'll provide a service overview and discuss system setup, vendor letters, emergency emails, and more.

P2P135 **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, and Staples. This class addresses how to create purchase orders from the electronic catalog. Procure to Pay fully automates the AP process, from purchasing to invoice processing to payable creation with customizable, role-based approval workflows. If you are interested in improving the efficiency of your procurement processes, this class is for you!

P2P145 **Procure to Pay: VENDOR*Café* Overview**

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

P2P150 **PAYscan Basics**

★ PAYscan delivers consistent AP 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.

P2P180 **VendorShield Basics +**

★ Learn how VendorShield can help you reduce operational and reputational risk. VendorShield is a full-service platform for vendor compliance and monitoring built into VENDOR*Café* and Voyager workflows. It features configurable criteria, reporting, and real-time, accurate compliance statuses to help you to know your vendors.

P2P220 PAYscan Performance Metrics & Operations Analysis

★★

With over seven years of product history and 1,500+ PAYscan clients, we have collected a wealth of industry information. We have mined this data, analyzed summary statistics, and are ready to share the results with you. 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.) See how you stack up against your peers and how to improve your company's operational performance.

P2P330 PAYscan & Procure to Pay Best Practices

★★★

Learn best practices for Procure to Pay setup and functionality. Gain efficiency, cut costs, and streamline your AP processing.

Reporting

RE050 Reporting Panel

○

This class is a Q&A session with Yardi technical staff about the reporting options in Voyager. We will cover everything from simple Yardi SQL scripting to high-end presentations with Orion Business Intelligence. You'll learn about possible customizations 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, so you can make savvy reporting decisions.

RE060 Yardi Spreadsheet Reporting Overview

❖

Yardi Spreadsheet Reporting (YSR) enables advanced report designers to create report packets in Voyager from individual documents designed in Microsoft Excel or Word. Without stressing technical instruction, this class reviews the capabilities of YSR and helps you understand why YSR is now the best Yardi tool to create boardroom-quality reports.

Reporting for Non-Developers

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 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 how to generate commercial invoices, letters, and statements. Similar to Word mail merge, the commercial correspondence feature uses templates to create documents using specific information from the database.

RE161 Correspondence for Residential

★

Discover how you can use Voyager to print or email letters and statements for your residents. Templates that pull specific database information are used to produce property-wide letters or statements, saving you time and boosting efficiency. Attend this course to learn how to use the correspondence feature to generate the resident documents 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 templates for account trees and property comparisons using standard or custom account trees. We will cover 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

★★

Learn how to populate the included residential and commercial performance tables and use these key performance indicators in reports.

RE250 Using YSR for Custom Financial Analytics

★★

A Yardi Spreadsheet Report using data from a previously developed custom financial analytic is the best way to deliver custom financial reports with boardroom-quality formatting. This class requires some familiarity with custom financial analytics. We will go over setting up the YSR report in Voyager 7S and Excel to retrieve data, as well as conditional formatting based on the design of the underlying account tree.

RE270 Custom Financial Analytics: Intermediate

★

This intermediate course builds on Custom Financial Analytics: Introduction (RE170). We will focus on creating templates for portfolio-based custom financial reports. Rethink how you analyze your portfolio. Learn how to create portfolio-type templates to compare GL accounts between properties or summarized by property attributes. Leverage standard or custom account trees to create attribute comparison-type templates.

RE370 Custom Financial Analytics: Advanced Topics

★★★

Custom analytics in Voyager are a versatile report designer. Once you've mastered getting your custom report to screen, Excel, or PDF, learn how to pull data for arithmetic manipulation from other rows and columns, access the total from an account tree expansion, use the rolling month and period-to-date functions for flexible customization, and other advanced features. We will also discuss tips and tricks for validating designs and correcting errors. *Prerequisite: RE170 (Custom Financial Analytics: Introduction)*

Reporting for Developers

RE405 Reporting Comparison Between YSR & SSRS

★

We will review and compare the two tools for rendering boardroom-quality, custom reports in Voyager 7S. As Yardi support for custom Crystal reports approaches end of life, heavy users of this technology need to understand the pros and cons of each approach. This session is light on technical detail but helps you 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 for custom reports and 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 the Voyager report rendering tool that enables designers to create packets of individual documents authored in Microsoft Excel or Word. This class will go over creating a YSR report, drawing data from Yardi SQL scripts and the analytic engines of conforming verticals, and using Voyager to administer your pool of YSR reports. You will get an overview of setup techniques for YSR, including how to establish runtime filters, map them to individual reports, and use the Excel add-in to help design reports. We will discuss tips and tricks, new features in the latest Voyager 7S releases, documentation, and how to learn more about YSR.

RE541 Yardi Spreadsheet Reporting
Technical Session: Part 2
★ ★
This course is a follow-up to RE540 for
those tasked with designing custom reports
using Yardi Spreadsheet Reporting (YSR).
New features are introduced, including our
reengineered Excel add-in release 5, with
analytic filter mapping documentation and
a hyperlink builder. We'll contrast the classic
YSR setup and interface with the alternative,
slimmed-down interface, explore the ability
to lock or hide passed-in filter parameters
from menu URLs, and show you how to add
custom fields to analytic-driven reports. As
time permits, we'll look at advanced technical
topics such as temporary tables, nested tables
in Word, digital signatures, and QR codes.
We will discuss how to echo filter values and
hide columns conditionally, as well as detailed
formatting tips and YSR best practices.

RE560 FillDocs
★ ★
Use Microsoft Word to create, customize,
and fill letters, notices, leases, and other
compliance-related correspondence. FillDocs
enables you to transition your letters and forms
from PDF or Crystal reports to Word at your
convenience. Many different documents can be
assembled into a single print job. This course
provides an introduction to FillDocs, with an
emphasis on leases, letters, and statements.
Prerequisite: RE505 (SQL Scripting)

RE680 Advanced SSRS for Developers
★ ★ ★
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 everything
you ever wanted to know about drilling down
(hyperlinks), passing parameters from scripts
to SSRS reports, multi-data table reports, and
sub reports.

Residential

CH020 Corporate Housing: Overview
★
Learn how Yardi's upcoming product for
corporate housing will help operators interact
with and manage corporate housing clients and
tenants better.

RMSP Spotlight on Multifamily
★
Join us after the General Session to discover
the latest developments and roadmap of
the Multifamily Suite. Get a sneak peek at
what is happening in Voyager Residential,
the RENT*Café* Suite (RENT*Café*, RENT*Café*
CRM, RENT*Café* Reach, and RENT*Café*
Connect), ScreeningWorks Pro, Procure to
Pay, and more. This course will also help you
identify other courses to attend for detailed
information in each area.

RM030 Yardi Elevate for Multifamily:
Introduction
●
Learn how Yardi Elevate Asset Intelligence
integrates data from RENTmaximizer and Yardi
Matrix to give you enhanced insight into your
properties' performance and help you reduce
expenses and improve overall revenue.

RM037 Yardi Elevate for Multifamily:
Facility Manager
●
Preview Yardi's latest innovation in unit turns
and inspections. Track your unit turn milestones
to gain unparalleled insight into your make-
ready process. Learn how to replace equipment
easily with one-click integration with
Marketplace. This product helps you reduce unit
turn times and increase asset value.

RM040 ScreeningWorks Pro: Introduction
●
Attend this course to learn the basics of
ScreeningWorks Pro (Resident Screening in
Canada). Learn about the services we offer,
our scoring model, and our approach to
screening. We will demonstrate our seamless
integration to your Voyager platform and
discuss the implementation process. You will
get a comprehensive overview of features,
customization options, and analytics.

RM045

● **Experian RentBureau & ScreeningWorks Pro**

Unlock the power of Experian RentBureau rental payment data at your communities. Experian RentBureau is the largest, most widely used database of rental payment information with 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 ScreeningWorks Pro (Resident Screening in Canada) can give you a distinct competitive advantage.

RM047

● **Application Fraud: Do You Know Who You're Renting To?** +

As the number of renters applying and executing leases online increases, identity fraud is growing as well. Join us to see how our ID Verify solution can help you to know who's renting your apartments.

RM070

● **Yardi Matrix for Residential**

This course covers Yardi Matrix as a decision support tool in multifamily investment transactions. Learn how our mapping technology lets you visualize geography and your investment criteria, so you can proactively identify candidates for acquisition and new development. See how to use loan maturity information, detailed unit mix data, sales and rent comps, and expense data to populate an acquisition model, helping you find the needle in the haystack and avoid pursuing incompatible deals. *(This course covers the same material as CM070 and SS070.)*

RM112

★ **Residential Budgeting & Forecasting**

Learn how to populate budget worksheets accurately and efficiently 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. Topics include re-forecasts, variance analyses, and analytic reporting during the budget period.

RM125

★ **Voyager Unit Pricing**

Voyager supports multiple methods for changing unit prices. The course covers unit pricing updates such as market rent increases and decreases (with and without amenities) as well as unit type pricing updates with revenue management.

RM137

★ **Yardi Elevate Facility Manager for Multifamily: Introduction**

Yardi Elevate Facility Manager is a new application with an emphasis on inspections and the unit turn and unit rehab processes. Also included is our all-new mobile app, with a simplified and streamlined user interface for completing inspections in the field. Come learn how these new tools can help you gain efficiency in turning and rehabbing your units.

RM160

★ **ResidentShield Renters Insurance**

With guaranteed policy fulfillment for every resident, ResidentShield renters insurance makes it easy to manage renters insurance enrollment and compliance. This course reviews our two renters insurance options, ResidentShield Protection Plan (HO4) and ResidentShield Master Policy Program, and covers topics such as workflow, features, customization, and analytics.

RM185

★ **Yardi Elevate Forecast Manager for Multifamily: Introduction** +

This course explores creating a revenue budget for your multifamily properties using in-place leases, vacant units, assumptions for rental increases, and other metrics to develop a full revenue forecast.

RM190

★ **Yardi Matrix: Market Research for Asset Management**

Learn how to use Yardi Matrix to gain insight into market conditions, including benchmarking your performance to similar assets in your markets and submarkets. Review new supply coming to market, investor activity, and employment.

RM195

★ **Yardi Elevate Asset Intelligence for Multifamily**

Learn how Yardi Elevate Asset Intelligence can help you reduce expenses and risk while increasing revenue. We will demonstrate how to view your assets' performance and compare it to other properties in your markets, using actual data on rent, operations, financial, marketing, and more. We will also show you how our big data set helps you to identify and address upcoming areas of concern more accurately, so your business stays on track and on budget.

RM210 ★★ RENTmaximizer: Multifamily Revenue Management

This session gives you an overview of the RENTmaximizer pricing model and the results current users are achieving. We will go over new features, including how to tie your marketing goals into the pricing algorithm.

RM220 ★★ Residential Analytics

Learn about the operational reporting system in Voyager. We will review how each section of the box score (availability, resident activity, and traffic) relates to your property's success. We will cover reports on conversion ratios, unit availability, resident activity, and traffic detail. We will also discuss storing portfolio-level residential KPIs for custom reports.

RM225 ★★ Lease Renewals

Voyager includes several functions that aid the time-consuming and important lease renewal process. Topics in this course include lease proposal batches, managing lease expirations from the dashboard, bulk approvals, letters, and processing scheduled and simple renewals.

RM230 ★★ Move-Ins & Transfers

Learn the details of the move-in process and how it affects occupancy and GL transactions. We will review all the system options for handling security deposits, including global, property, and unit type options as well as the effects on physical occupancy (history tables). You will get tips for troubleshooting the move-in process and associated GL transactions.

RM235 ★★ Move-Out Process

Learn the details of the move-out process. We will discuss tracking and canceling notices, adjusting move-out dates or canceling a move-out, and processing a move-out with deposit accounting, statements, and deposit accounting. This course also reviews accounting effects, setting up default move-out charges by unit type, and the effects on occupancy and history tables.

RM240 ★★ Property Takeover & Conversion

How do you manage the process of taking over a property, where do you start, and what tools should you use? This course offers an overview of managing the takeover process. We will cover logistics, tools, and validating your data.

RM242 ★★ Y2Y Conversion Tool

Simplify residential property takeovers from another Yardi database by managing the entire process with the Yardi to Yardi (Y2Y) tool. We will cover the steps to export and import property data via XML, mapping the chart of accounts and change codes directly in Voyager, and current and historical trial balances.

RM260 ★★ ScreeningWorks Pro: Best Practices

This course is for ScreeningWorks Pro (Resident Screening in Canada) users looking to optimize their use of the platform. Learn about industry trends and recent product enhancements. You will get an overview of workflow, features, customization, and analytics. The session will conclude with a brief roundtable discussion about industry trends related to screening and what ScreeningWorks Pro 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 of setup options, configuring late fees to run automatically at night, and market-specific setup.

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 ★★★ 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.

SF130

★

Single Family Homes:
RENT*Café* & RENT*Café* CRM

RENT*Café* Single Family Homes delivers improved workflows for applicants and helps leasing staff track prospects easily. 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 portal.

SF201

★★

Single Family Homes:
Best Practices

Voyager Single Family Homes is optimized to meet the demands of single family housing managers. Learn the standard operating procedures and latest features that enhance productivity and help prevent issues.

SF202

★★

Single Family Homes:
RENT*Café* Best Practices +

This class will be focused on home onboarding and Site Manager for the single family homes market.

ST120

★

Voyager Student Housing Basics

Voyager Student Housing supports the specialized needs of the student housing industry. Discover how to optimize your use of Voyager Student Housing.

ST130

★

Flex Leasing:
RENT*Café* Student Housing & CRM

RENT*Café* Student Housing and RENT*Café* CRM Student Housing create a seamless experience for prospective and current residents in 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.

Technology

TE020

❖

YardiOne: Introduction

Ever wish you didn't have to enter your credentials each time you access a Yardi program? Do you wish you could access all your Yardi applications in one place? YardiOne is for you! In this session, we will cover what YardiOne is, the user experience, and why you should use YardiOne for your company. If you're a system administrator or interested in learning more about YardiOne, join us!

TE060

●

Document Management
for SharePoint

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 help you search, select, organize, describe, and classify your properties or entities. Learn how to set up attributes and use them to filter reports and create dynamic property lists.

TE170

★

Client Central Essentials

Client Central is your most useful resource for Yardi 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 discuss how to administer your Client Central groups, users, and permissions.

TE171

★

Client Central New Features

The Client Central team will guide you through advanced features such as ySQL, support requests vs cases, and SOX reports. Additionally, this class offers lots of Q&A opportunities with the senior support staff responsible for Client Central. Recommended for those familiar with the basics of Client Central, who have taken TE170 and want to advanced their knowledge.

TE180 User-Defined Fields & Custom Tables in Voyager 7S

★

Voyager offers many ways to customize what information is collected and how it appears on the screen. Learn how to enable user-defined fields to store additional data and create custom tables to control the formatting, field requirements, and layout of screens with additional data.

TE205 Getting Started with Yardi Elevate +

★ ★

This class covers core Elevate settings, including users, roles, custom menus, and their interactions. We will also review the Elevate user interface. Attendees should have purchased and/or reviewed one or more Elevate products.

TE215 System Administration Toolbox

★ ★

Become familiar with the utility toolbox. Learn what each tool does and when to use it. We will also demonstrate reporting capabilities.

TE230 Transaction & Budgets Import/Export

★ ★

We'll discuss import and export of entry of high transaction volumes in Voyager. This is an ideal approach for importing beginning historical balances, trial balance data from another database, creating transactions from data in an external system, and importing 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.
Prerequisite: RE110 (Basics of Database Schema & SQL)

TE265 Document Management for SharePoint

★ ★

The 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 knowledge of Voyager menus and security. This course covers security analytics, the menu editor, and security functionality.

TE335 SQL Scripting: Advanced Topics

★ ★ ★

SQL scripts can 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 share tips and tricks from scripting experts.

TE360 Voyager Standard Interfaces Overview

★ ★ ★

This class will provide an overview of the standard interfaces currently available as part of Voyager. We have general and market-specific interfaces for multifamily, condo, commercial, student housing, and more. Topics will include available interfaces, services in each interface, qualified Voyager interface partners, and Voyager setup and configuration. Come see new interfaces for the commercial market.

Vertical Markets

AS100 Voyager Condo, Co-op, & HOA Roundtable

⊙ Join members of the Voyager Condo, Co-op, and HOA support teams and industry peers to discuss new features, CONDO*Café* and CONDO*Café* Certificates, and more.

AS132 CONDO*Café* Portal for Condo/HOA Clients

★ CONDO*Café* allows association owners and shareholders to check their real-time ledger balances, make online payments, create and check work order requests, and submit change request forms.

AS134 CONDO*Café* Certificates

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

CO010 Kube for Coworking: Introduction

● This course will introduce you to our new coworking product, Kube. We'll discuss coworking spaces, terminology, and market forces and demonstrate the product. Kube offers e-commerce, CRM, billing automation, building automation and IT management, reporting, and more. We'll also cover typical challenges encountered by coworking operators and how we solve for them. The session will wrap with time for your questions.

SN060 EHR Update & Roadmap ▪

★ This course reviews recent updates to Yardi EHR that increase efficiency and improve the end user experience for senior living providers. We'll also preview planned enhancements.

SN070 Senior CRM Update & Roadmap ▪

★ Learn how recent updates to Senior CRM can help streamline your business operations. We will also highlight planned enhancements.

SS070 Yardi Matrix for Self Storage

● This course covers Yardi Matrix as a decision support tool in self storage investment transactions. Learn how our mapping technology lets you visualize geography and your investment criteria, so you can proactively identify candidates for acquisition and new development. See how to use loan maturity information, detailed unit mix data, sales and rent comps, and estimate valuations to populate an acquisition model, enabling you to find the needle in the haystack and avoid pursuing incompatible deals. *(This course covers the same material as CM070 and RM070.)*

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