YASC '17

Yardi Advanced Solutions Conference

Agenda & Course Descriptions

10 October
Singapore

YARDI

Agenda and Event Planner

Tuesday 10th October

07:45 – 09:00	Registration & Light Breakfast
09:00 – 10:20	Keynote Address & General Session
10:20 – 10:45	Morning Tea

Classroom Sessions

	Saffron 1	Cinnamon	Ginger 1	Ginger 2	Nutmeg 2
10:45 – 11:45	Investment Management: Introduction	Leasing Manager: Introduction	Fixed Assets	VENDOR*Café* Advanced	Orion Business Intelligence: Introduction
11:55 – 12:55	Investment Management: Advanced Accounting Advanced	Leasing Manager: Advanced Topics Advanced	Job Costing	Yardi PAYscan	Orion Business Intelligence: Advanced Topics Advanced
13:00 – 14:00	Lunch				
14:00 – 15:00	Advanced Budgeting & Forecasting: Introduction	Lease Administration	Unit Sales CRM	COMMERCIAL*Café* & Tenant Portal	Commercial Reporting
15:00 – 15:30	Afternoon Tea				
15:30 – 16:30	Advanced Budgeting & Forecasting: Advanced Topics Advanced	Financial AR Best Practice with Collection Analytics	Unit Sales	Facilities Management: Standard Work Orders	Bank Reconciliation: Bank Book
16:40 – 17:40	Investor Plus & Investor Portal	Custom Financials & Account Trees	RENT*Café*	Facilities Management: Advanced Maintenance & Inspections	Utility Billing
17:40 – 19:30	Cocktail Party				

Class Descriptions

Advanced Budgeting & Forecasting: Introduction

14:00 – 15:00 | Saffron 1

This course includes an introduction to the Advanced Budgeting & Forecasting budget and reforecasting process, model properties and forecasting leases, the budget dashboard, working within the budget worksheet, lease revenue forecasting options (FLO vs MLAs), and a review of budget transactions. We will also cover integration with other modules, populating budget worksheets with projected values based on various sources including historical GL or budget data, use of models and formulas, automated budget functions, budget task automation with function groups, and budget and reforecast reporting.

Advanced Budgeting & Forecasting: Advanced Topics

15:30 – 16:30 | Saffron 1   Advanced

This course covers will introduce display-type configuration for the Forecast Leasing Options (FLO) grid and speculative (forecasting) leases, template MLAs for speculative new leases, creation of FLO-enabled budgets and assigning display type, navigating the FLO grid (including how to use risk and activation columns), creating speculative new and renewal lease amendments, FLO unit configuration, managing FLO status and resolving exceptions, FLO assumption reporting, comparing parent and model property leases, accessing speculative lease amendments, the commercial revenue forecast function, and review of lease revenue budget transactions resulting from FLO assumptions. This session will also provide an overview about a power calculator used by asset managers that will help determine present value and IRRs of individual assets using a discounted cash-flow model. Other course topics include key reports for managing analyses, manual revenue/expense entry, and how to apply market assumptions such as simple cap rate entry, discount rates, growth/inflation rates, and general vacancy.

Bank Reconciliation: Bank Book

15:30 – 16:30 | Nutmeg 2

Discover how Asia's MT940 banking format fits into Voyager 7S bank reconciliation module seamlessly. This class also includes GIRO and automated EFT payments. Learn about major Bank Book implementation considerations, setup steps, and best practice processes post go-live.

COMMERCIAL*Café* & Tenant Portal

14:00 – 15:00 | Ginger 2

COMMERCIAL*Café* is your company's online marketing presence for tenants and prospects. Provide tenants with best-in-class services through access to tenant statements and other tenant documentation, online payments, maintenance requests, and other service offerings. Provide greater visibility of available leases and promote properties for sale while integrating corporate brand identity and messaging. Listings on COMMERCIAL*Café* can include all types of commercial property categories.

Class Descriptions

Commercial Reporting

14:00 – 15:00 | Nutmeg 2

In this course, we will review some of the Voyager standard commercial and leasing reports available through analytics, Asia-specific custom YSR reports, and basic columnar reports. Many of these reports are already available within the system or are available either free or for a nominal fee upon request.

Custom Financials & Account Trees

16:40 – 17:40 | Cinnamon

Custom financial analytics enables users to create customised reports that are not readily available through financial analytics. This function provides a front-end report builder for quick, customisable reports, giving users the ability to incorporate Voyager data into a custom report template. Custom analytics can drill down into each G/L account level. The report filter supports property data and attributes filtering at run-time, and can immediately be exported to Excel. Customised reports can be used with standard or custom account trees.

Financial AR Best Practices with Collection Analytics

15:30 – 16:30 | Cinnamon

In this course, we will review financial AR best practices and the Voyager collector workstation—a new credit control utility that allows users to update a tenant's credit status with ease and manage interactive credit control reports to help Voyager users track the credit control status of their portfolio effectively.

Fixed Assets

10:45 – 11:45 | Ginger 1

The fixed assets module enables you to create fixed assets through purchase orders, payables, and journals. Learn about some features introduced for Asia Pacific clients relating to treatment of low-cost assets and assets depreciated to a low value to be placed in a low-value asset pool and capital works. We will also explore the system's ability to adjust depreciation appropriately if depreciation was incorrectly calculated and posted in a past accounting period.

Facilities Management: Standard Work Orders

15:30 – 16:30 | Ginger 2

Did you know that every core Voyager license includes work order functionality? Come along and see how to use Voyager work orders to manage your maintenance tasks. We will review work order configuration, work order capabilities and workflow, use of email and correspondence, and analytic reporting. Finally, we look at how work orders integrate with other areas of Voyager.

Facilities Management: Advanced Maintenance & Inspections

16:40 – 17:40 | Ginger 2   Advanced

Yardi Advanced Maintenance, part of the Yardi Facilities Management Suite, allows you to schedule, track, and manage all preventative, routine, and emergency maintenance from your desktop or mobile device. In this course we will cover work order capabilities including planned preventative maintenance, inspections, fixed assets, and inventory control. We will also cover aspects of Maintenance, Maintenance Manager, Inspections, and Facilities Manager.

Investment Management: Introduction

10:45 – 11:45 | Saffron 1

In this course we will discuss cash flow, waterfalls, performance measurement, and the Yardi InvestorPlus product.

Investment Management: Advanced Accounting

11:55 – 12:55 | Saffron 1   Advanced

In this course you will learn about system configuration of investment management levels, entities, and commitments in line with a legal fund/group structure. We will discuss the use of rules and rule sets to automate financial consolidation and eliminations posted to different books. Finally, we will review the financial consolidation results through financial analytics and segment comparison reports.

InvestorPlus & Investor Portal

16:40 – 17:40 | Saffron 1

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

Job Costing

11:55 – 12:55 | Ginger 1

This session provides an overview of the basic functionality available to track budgets, commitments, and expenses in Yardi Construction Management. Session topics may include Voyager setup for job cost, cost categories, jobs, contracts, and change orders.

Lease Administration

14:00 – 15:00 | Cinnamon

Take your use of Voyager lease administration functionality to the next level by learning about how to handle certain advanced tenant scenarios. Session topics include advanced amendment types (relocation, expansion, contraction, and assignment), management of cash (security) and non-cash (bank guarantee), straight line adjustments for rent-free, and tracking of lease incentives (costs and inducements).

Class Descriptions

Yardi Leasing Manager: Introduction

10:45 – 11:45 | Cinnamon

This course includes an introduction to Yardi Leasing Manager (formerly Commercial LeasingPad), and discusses how your leasing team can track and manage the end-to-end lifecycle from prospect, through negotiating deal, to an active tenant using company-specific deal approval workflows. Session topics also include configuring the Leasing Manager dashboard, creating deal templates, generating leasing documents, and management deal approvals.

Yardi Leasing Manager: Advanced Topics

11:55 – 12:55 | Cinnamon | Advanced |

In this course, you will learn how about how short-term leases can be managed using Yardi Leasing Manager (formerly Commercial LeasingPad) and how to use the Floor Plan functionality to analyze lease data from client-specific KPIs. This session will provide an overview of casual mall leasing-rate configuration, how to create daily or hourly bookings through the Reservation Diagram, and how to configure Floor Plan.

Orion Business Intelligence: Introduction

10:45 – 11:45 | Nutmeg 2

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

Orion Business Intelligence: Advanced Topics

11:55 – 12:55 | Nutmeg 2 | Advanced |

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

Yardi PAYscan

11:55 – 12:55 | Ginger 2

Yardi PAYscan delivers consistent policies, eliminates the physical movement of paper, and improves the efficiency and accuracy of your Procure to Pay process. In this class we will cover PAYscan functionality and take a look at both the PAYscan mobile application and PAYscan on the VoyagerPlus platform.

Class Descriptions

RENT*Café*

16:40 – 17:40 | Ginger 1

In this course, you will learn about RENT*Café*—used by residential clients to attract prospects, turn leads into leases, and retain residents with an all-in-one marketing solution including dynamic websites, online leasing, and built-in social media and reputation management tools.

Unit Sales

15:30 – 16:30 | Ginger 1

In this course, you will learn about Unit Sales — used by residential clients to track unit sales and facilitate the end-to-end sales process of a residential unit.

Unit Sales CRM

14:00 – 15:00 | Ginger 1

Learn how residential clients can effectively track residential prospects and streamline the conversion of leads into deals. This course will also provide an overview of how the end-to-end processing of a residential deal is managed using this module.

Utility Billing

16:40 – 17:40 | Nutmeg 2

Yardi Utility Billing allows you to keep tracks of meter readings and country-specific utility billing formulae. Session topics will cover how utility meters can be set up, tracking meter readings, calculating utility charges based on utility formulae, and integration with meter management systems.

VENDOR*Café*

16:40 – 17:40 | Ginger 2   Advanced

Part of Yardi Procure to Pay, VENDOR*Café* dramatically reduces paper and email invoices with mobile-enabled electronic vendor management. Centralize product and service vendor information in a single system of record, with a complete view of all your vendors and property associations. Define your onboarding process to ensure only approved vendors enter your accounting system, and proactively assess vendor risk across your portfolio. The portal allows the vendor to submit invoices for payment, view invoice approval status, and gain insight into vendor ledger information. Learn how VENDOR*Café* can help integrate work orders and purchase orders, and seamlessly tie back to payable invoice processing in Voyager.