



 **YASC17**  
YARDI ADVANCED SOLUTIONS CONFERENCE

September 13–15, San Diego, CA

# Accounting

## Finance

### AC050 Financial Reporting Overview

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

### AC131 Voyager Bank Reconciliation

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

### AC133 Troubleshooting Bank Reconciliation

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

### AC160 Financial Analytics

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

### AC165 Segmented Accounting in Voyager 7S

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

### AC210 Introduction to Account Trees

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

### AC215<sup>†</sup> Automating Management Fees

- ◆◆ Explore Voyager's Management Fee functionality and the enhancements it offers over the Pay Commission functionality. Learn how to let Voyager track and calculate your management fees, create payables on a recurring basis, and learn about new functionality that enables you to book AR on your corporate books for the pending income.

### AC230 Month-End Processing for Residential

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

## 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

● SALES DEMONSTRATION

⌘ INDUSTRY INFORMATION

◎ FOCUS GROUP

\* NEW COURSE

† UPDATED COURSE

# Accounting

## AC231 Residential GPR Explained



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

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



Month-end is a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks.

## AC241 Voyager 7S Intercompany



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

## AC245 Voyager 1099s



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

## AC250 Correcting Resident & Tenant Ledgers



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

## AC260 Mortgage Accounts Payable



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

## AC320 GL Allocations



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

## AC340 Advanced Account Trees



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

## Cash Management

### EE120 CHECKscan



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

### EE260 Online Payment Processing



This course will focus on one-time ACH and credit card payments made through RENTCafé. We will demonstrate the process of making payments online, plus show how they are reflected on the ledger in Voyager and the resident services account. This course will also briefly cover the sign-up process for recurring payments in RENTCafé. We'll finish up by reviewing daily procedures and reporting.

### EE280 Recurring Payments



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

### EE370 Payment Processing Best Practices



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

# Accounting

## Procurement

### EP040 Bill Pay Overview

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

### EP050 Procure to Pay Demo

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

### EP100<sup>+</sup> New Features Update: Yardi Procure to Pay

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

### EP150 PAYscan Basics

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

### EP155 Procure to Pay and PAYscan for the VoyagerPlus Platform

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

### EP220\* Yardi PAYscan Performance Metrics and Operations Analysis

- ◆◆ With over seven years of product history and over 1,200 clients, the PAYscan AP database contains a wealth of industry information. We have mined this data, analyzed summary statistics, and are ready to share the results with our users. How many invoice approval workflows does a typical organization employ? How long does it

take to approve an invoice? How many individuals must review an invoice before it is approved for payment? To what extent are purchase orders used? Can speed and accuracy go together? The answer is YES by the way. See how you stack up against your peers and how to improve your company's operational performance.

### EP320 Yardi PAYscan Tips & Tricks



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

### ES040 Yardi Procure to Pay: Marketplace Overview

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

### ES070 Yardi Procure to Pay: VENDORCafé Overview

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

## Affordable Housing

### AF060 RENTCafé Affordable Housing Roundtable



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

### AF100 Spotlight on Affordable Housing



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

# Affordable Housing

## AF112\* New Features Update:

### RENTCafé Affordable Housing

- ◆ RENTCafé Affordable Housing continues to evolve. Join us as we discuss the updated property manager dashboard, new options for leases, signature enhancements, and waiting list features. [All Subsidy Types]

## AF115\* RENTCafé Affordable Housing Applicant Workflow

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

## AF135 RENTCafé Affordable Housing Site Manager

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

## AF150-1 Affordable Housing Waiting List: Setup

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

## AF150-2 Affordable Housing Waiting List: Workflow

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

## 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 within Voyager to help your company be more efficient and effective. [All Subsidy Types]

## AF202 Introduction to Local Programs

- ◆◆ Managing multiple compliance programs on a property can be challenging, especially when state, city, and local programs are added to the mix. Join us as we preview a new addition to Voyager Affordable Housing known as Local Programs. In this session we will explore how to manage an unlimited number of

compliance programs with conflicting rules, income, and rent limits. Learn how to set up and administer local programs including establishing income and rent limits on a program-by-program or unit-by-unit basis. Discover how applicants are determined qualified or unqualified for any compliance program mix. We will also be looking for your insights and input as we bring this new addition to market. [Local Programs]

## AF218 Introduction to Affordable Housing Letters & Forms with FillDocs



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

## AF227-1 Repayment Agreements Part 1: Setup



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

## AF227-2 Repayment Agreements Part 2: Workflow



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

# Affordable Housing

## AF227-3 Repayment Agreements Part 3: Troubleshooting

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

## AF231 Converting to TRACS 203A

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

## AF236 Unit Transfers & Gross Rent Changes

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

## AF240<sup>+</sup> Best Practices for Vouchers

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

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

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

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

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

## AF260-3\* Affordable Housing Accounting Part 3: Reports

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

## AF260-4 Affordable Housing Accounting Part 4: Troubleshooting

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

## AF270-1 Tax Credit Best Practices Part 1: Setup

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

## AF270-2 Tax Credit Best Practices Part 2: Procedures

- ◆◆ This is a continuation course of AF270-1, covering Tax Credit workflow best practices and property setup within Voyager Affordable Housing. This class will further discuss maintaining compliance through the use of the compliance monitor, NAUR toolbox, and available tax credit-specific reports including state PSR reports and other online state reporting. [Tax Credit] (Part two of a two-part class)

# Affordable Housing

## AF280\* Rental Assistance Demonstration (RAD)



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

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



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

## AF290 Affordable Housing Ad Hoc Reporting



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

## AF291\* Understanding Affordable Housing Analytic Reports



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

## AF318 Advanced Affordable Housing Letters & Forms with FillDocs



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

## AF900 The MAT Guide



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

## AF903 Future Changes to HUD Occupancy



The FAST Act, the Streamlining Final Rule, HOTMA, and other future changes will affect HUD occupancy in major ways over the next one to two years. Join us to discuss changes that have already been passed by congress and proposed changes that will affect day-to-day processes.

## AF950-1 EIV Income Discrepancies: Part 1



Many property management professionals still struggle to understand the EIV Income Discrepancies. Join us to learn more about this important issue. (Part one of a two-part class)

## AF950-2 EIV Income Discrepancies: Part 2



Many property management professionals still struggle to understand the EIV Income Discrepancies. Join us to learn more about this important issue. (Part two of a two-part class)

## AF970-1 HUD's Annual Certification Process



Join Mary Ross for an up-to-date discussion of the AR process. This class is designed to help you review your current process and to discuss possible changes. We will discuss HUD's requirements and discuss real-world challenges.

## AF970-2 HUD's Interim Certification Process



This class includes a review of the IR process, including how to handle challenging scenarios such as residents who do not receive income throughout the year (e.g., teachers), and residents who request multiple interim certifications during the year because of frequent changes in employment or income. Learn about certification options available to you and discuss ideas to reduce the number of IRs created during the year.

## VAUG Voyager Affordable User Group



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

## Commercial

### CM030\* COMMERCIALCafé Tenant Portal: Introduction



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

# Commercial

## CM050 Spotlight on Commercial & Investment Management

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

## CM061\* COMMERCIALCafé Marketing: Introduction

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

## CM063\* Deal Manager: Introduction

- Yardi Deal Manager centralizes deal entry, tracking, and approvals in one simple-to-use solution for brokers and asset managers. Ideal for office and industrial clients, Deal Manager significantly improves the workflow of internal and external brokers, while providing enhanced deal pipeline visibility to asset managers. This class will explore the solution's features and the benefits it can provide.

## CM065\* Deal Manager: Development Roundtable

- ✚ Case studies from existing clients will highlight how leasing agents and asset managers are closing deals faster on Deal Manager. Learn about future product direction and participate in the conversation.

## CM070 Yardi Matrix for Commercial

- This course covers the use of Yardi Matrix as a decision-support tool that facilitates commercial investment transactions by proactively identifying acquisition and new development candidates. Learn how our mapping technology enables you to visualize both the geography and your investment criteria. See how loan maturity information, detailed tenant information and available space, sales comps, expense comps, estimated valuations, and population of an acquisition model enable you to find the needle in the haystack and avoid unproductive time pursuing incompatible deals.

## CM100 New Features Update: Voyager Commercial

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

## CM110 Basic Lease Administration & Setup

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

## CM135 Commercial Month-End Processes

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

## CM140 COMMERCIALCafé Tenant Portal: Advanced Features

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

## CM150 Commercial Recoveries: Introduction & Setup

- ◆ Join this course to learn how the Voyager recovery toolset helps users accurately process CAM recoveries. The instructor will review recovery reconciliations and tenant charge schedule adjustments using our intuitive toolset and straightforward reconciliation function.

## CM180\* Tax & Insurance

- ◆ The Tax and Insurance function of Yardi Voyager allows you to track information about tax parcels and insurance policies related to properties, vendors, customers, owners, and leases. Tax and Insurance helps you manage your responsibilities and ensure that all tax liabilities are paid and all insurance policies are up-to-date.

## CM205\* Commercial Best Practices

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

## CM230 Advanced Lease Administration

- ◆◆ Learn how to manage long-term leases in your database with lease administration in Voyager. This course will cover advanced administration tools for modifying, expanding, contracting, renewing, and re-measuring.

## CM231 Yardi's Retail Solutions: Introduction

- ◆◆ Learn how to manage long-term retail leases in your database with lease administration in Voyager. This course will teach you how to set

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up the retail system, track tenant retail sales, and charge coverage (percentage) rents.

## CM240 Orion Business Intelligence for Commercial: Introduction



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

## CM250 Straight-Line Rents



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

## CM263\* Deal Manager: Advanced Topics



Yardi 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. Learn more about how this new module interacts with Yardi Leasing Manager (formerly Commercial LeasingPad) and Voyager to simplify the legal and lease administration process.

## CM305 Commercial Best Practices: Additional Topics



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

## CM331 Yardi's Retail Solutions: Advanced Topics



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

## CM341 Orion Business Intelligence for Commercial: Advanced Topics



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

walk you through how to identify business needs, define necessary metrics, and build solutions using the toolset within Orion Business Intelligence.

## CM350 Commercial Recoveries: Complex Features



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

## CM355 Commercial Recoveries: Design Strategies for Conventional and Advanced Recoveries



Learn how to set up the simplest CAM expense pools imaginable, including the NEW advanced recoveries expense pools (a.k.a. cost distribution)! This session will discuss strategic options for expense pools' setup, how to help standardize usage portfolio-wide, and document policies and procedures when using Voyager's CAM module. The course includes a discussion of the pros and cons of conventional vs. advanced recoveries.

## CM360\* Lessee Accounting: ASC 842 & IFRS 16 Accounting Standards



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

## eLearning

### eLFG Development Roundtable: Yardi eLearning



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

### eL040 Yardi eLearning: Introduction



Find out how Yardi eLearning can improve your training program by bringing together fully customizable Yardi software training with critical industry-specific topics, from fair housing compliance and safety courses to preventing sexual harassment and diversity training. Yardi's five-in-one tool combines the accountability, reporting, and efficiencies of a learning management system with a complete authoring toolset, graphics

# eLearning

editor, file storage center, and event and webinar management system. Connect your university with HR systems and additional programs to fully automate your training for all onboarding and continued education. Elevate learning, save time, reduce errors, and improve training efficiency with Yardi eLearning.

## eL140<sup>†</sup> Rapid Content Creation in Yardi eLearning

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

## eL160<sup>†</sup> Maximizing Effectiveness of Instructor-Led Training in Yardi eLearning

- ◆ Maximize the effectiveness of all your live events, whether they are delivered in-person or over the web using Yardi eLearning. Import your webinars from Citrix, Cisco, or Adobe to streamline meeting management tasks such as meeting setup, registration, pre-event handout distribution, and attendance tracking. Add online tests that are distributed to all attendees at the conclusion of the event to capture knowledge retention and reinforce key learning objectives. We'll walk through the event process from creation to closing attendance!

## eL180\* Creating an Effective & Sustainable Training Program with Yardi eLearning

- ◆ Getting the most out of your employees means investing in your training program. Leverage Yardi eLearning to set them up for success. Learn how to design effective and sustainable training programs that start with solid learning goals and deliver curriculum using fully automated learning paths that guide your learners through material over time. With Yardi eLearning's student notifications and automated reporting, you and your learners will always be up to speed. Identify and eliminate costly skill gaps by designing strategic custom training delivered through a highly customizable eLearning solution.

## eL190\* Curating a Complete Training Resource Center in Yardi eLearning

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

## eL195\* Tracking Learner Data & Organizational Trends with Yardi eLearning Reports

- ◆ From individual test scores to quarterly trend analysis, Yardi eLearning reports will help you gain insight into your learner activity. In this class, we'll take a look at the different levels of reporting. Individual performance reports, test scores, past due reports, and general activity reports is just a start. We'll also take a deeper look at some useful reports that can help you understand the overall health of your university, probing the top courses completed or your top learners over a period of time. Lastly, we'll explore how to schedule many of these reports to be delivered directly to your inbox.

## eL240 Managing Learner Data in Yardi eLearning

- ◆◆ Explore Yardi eLearning tools designed to help you get ahold of your learner data. We'll discuss important data management tasks such as disabling users, moderating discussions, and finding important documents. We'll also cover automating user creation, bulk course assignments, and managing your catalog and take a look at key learner performance data by taking a look at reports and stats that will help you stay on top of what's going on in your eLearning university.

## eL260\* Reclaiming Your Work Day by Automating Yardi eLearning

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

## eL320\* Security Permissions for Supervisors & Custom Admin Roles

- ◆◆◆ Empower managers and supervisors to take an active role in their employees' training. Learn how to set up administrative privileges for supervisors by giving them limited access to coaching their employees and running reports. Want to give them additional responsibilities? We'll show you how to customize supervisor access and create custom admin roles for executives, training admins, webinar instructors, master instructional designers, and more. Grow your training program by inviting additional administrators into the university on your own terms.

# Energy

## EU040\* Smart Energy Suite for Multifamily & Commercial Properties

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

## EU210\* Utility Billing for Multifamily

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

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

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

# Marketing

## KT010\* Marketing Automation with RENTCafé Suite

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

## KT030\* RENTCafé: Marketing Suite End-to-End

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

# Marketing

## KT080\* Social Media Strategy: Customer Care

- ◆ Managing your company's online reputation can be challenging. Numerous review sites and poor customer service experiences present opportunities to turn your social media detractors into followers. Learn how to address negative social media reviews, manage difficult customers, and use a care-focused strategy to inspire your company's social media presence.

## KT120 RENTCafé CRM Prospect Engagement

- ◆ Join us as we take a deep dive in to lead tracking with RENTCafé CRM. The training will be focused on queue management with a focus on the prospect lifecycle, and how to leverage the CRM tools available to boost your leasing initiatives.

## KT130 RENTCafé Marketing Website Best Practices

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

## KT135 RENTCafé Connect

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

## KT140 RENTCafé Resident Experience

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

## KT155 Introduction to RENTCafé eDocs

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

## KT160 The RENTCafé Prospect Experience

- ◆ This course will teach you how to enhance a prospective renter's online experience. We will cover features available to customize and optimize the online application process for prospective applicants. Course attendees will gain a new perspective on

# Marketing

how to boost prospect conversions, capture leases, and build a lasting relationship with qualified leads.

## KT201 [RENTCafé CRM: New & Extended Features](#)

◆◆ This course will capture how to get the most out of your RENTCafé CRM software. What's new? What's trending? We will cover the latest and greatest with RENTCafé CRM and discuss our favorite features worth adopting into your workflow!

## KT210 [RENTCafé Site Manager: New & Extended Features](#)

◆◆ This course will capture how to get the most out of your RENTCafé software. What's new? What's trending? We will cover the latest and greatest with RENTCafé and discuss our favorite features worth adopting into your workflow!

## KT220\* [RENTCafé Company Level Marketing](#)

◆◆ Are you interested in using our Corporate Site functionality? We will cover corporate site configuration options, marketing recommendations, company-level ILS syndication, and much more. Learn how to maintain a strong online branding presence when marketing from the company level.

## KT225 [RENTCafé Correspondence](#)

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

## KT250 [RENTCafé Leasing Workflow Scenarios](#)

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

## KT275 [RENTCafé Resident Retention](#)

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

## KT320 [RENTCafé CRM Resources](#)



Be in the know, leveraging RENTCafé CRM resources, and empower yourself with product knowledge. Follow along as we dig in to user management, fun FAQs, and common troubleshooting questions. Build your understanding of ROI, conversion ratios, marketing sources, or listen to call recordings straight from your RENTCafé CRM reporting menu. We'll take a deep dive into CRM reporting to help you decide which reports are best suited to fit your needs.

## KT325 [RENTCafé Marketing Strategy](#)



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

## KT340\* [RENTCafé eDocs: Advanced Topics](#)



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

## KT375 [RENTCafé Leasing with Blue Moon](#)



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

## KT390 [RENTCafé Online Leasing Best Practices](#)



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

# Modules

## IMFG Development Roundtable: Investment Management

- ◆ This session will be divided into two parts. In part one, the development team will preview new product features recently released. Product themes include capital processing, partner transfers, acquisitions/opportunity tracking, and InvestorPlus dashboard reports. In part two, the Investment Management client services and development teams would like to hear from you on industry best practices and how Yardi can support the goals of your organization.

## MA031\* InvestorPlus: Business Intelligence

- This course will demonstrate how you can use InvestorPlus to display key metrics on role-specific dashboards to respond to investor inquiries, consultant RFPs, or simply know your investment's performance at a glance. We'll cover at what levels dashboards can be used, the various charts and grids available to the user, and how users can interact with the data. Learn about special features such as the crosstab widget, investment management template-based data sets, calculating weighted averages, compliance, and more.

## MA032\* InvestorPlus: Investor Relationship Management & Deal Tracking

- This course will demonstrate how InvestorPlus can help you manage investor relationships including prospecting, correspondence, and reporting. Learn how to leverage workflows and notifications to vet new investors or track potential investment opportunities. Create dashboards to display pipeline activity for acquisitions and disposition and drill into the underlying details.

## MA150 Introduction to Yardi Advanced Accounting

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

## MA200 Introduction to Investment Management

- ◆◆ Automate the complex accounting transactions of fund management to dramatically reduce the analysis required by traditional accounting. Yardi Investment Management allows you to manage your wholly-owned assets, joint ventures, and other investment types for both small and large portfolio investors. This double session will cover all of the major processes required to configure and create capital transactions including setting up complex investment structures and managing commitments going forward, transaction types, cascade rules, generating capital calls and distributions, tax withholding, partner transfers, income/MV allocations, management fee calculations, and reporting.

## MA220 Investment Management Analytics & Custom Reporting

- ◆◆ This course will go in depth on how to leverage standard investment management analytics to view capital transactions in a variety of formats and how to create your own investment management templates for a multitude of purposes. The second half of this class will cover investor contact management configuration, how to use YSR to generate investor-facing correspondence, and how to leverage our Investor Portal for report distribution and tracking document downloads. Report examples will include distribution notices, capital call letters, and investor summary statements.

## MA300<sup>†</sup> Investment Management Performance

- ◆◆◆ Part one of this double session will show you how to generate IRRs and returns for your properties, assets, and portfolios. Using NCREIF as the industry benchmark, we will demonstrate how to configure your system for data submission, how to generate the components and returns using our core calculator analytics, and how to verify the results with standard YSR reports. Part two will focus on calculating investor/investment returns and equity multiples using capital transactions from Yardi Investment Management. With an eye on the GIPS methodology, we will cover how the program calculates time-weighted returns. Finally, we will show you how you can use InvestorPlus's attribution analysis for composites and how to answer the "what if" questions posed by your clients and prospects.

## MA310 Investment Management: Advanced Topics

- ◆◆◆ This advanced course dives deeper into the Investment Management product for clients who have specific needs. Topics covered include share tracking, pro-rated income allocations, and commitment recalculations (all used for open funds), capital balance and time-weighted share percentage allocation, and revaluation processes (MV/FX). We'll also introduce preferred return accruals, return of capital, and distribution of excess funds. (This is a follow-up to MA200)

## ABFFG Development Roundtable: Advanced Budgeting & Forecasting

- ◆ This session will be divided into two parts. In part one, the development team will preview new product features currently in progress and ask for client feedback. In part two, join in an interactive session where you can influence future product development.

## MB112 Budgeting & Forecasting

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

# Modules

## MB120 Advanced Budgeting & Forecasting: Introduction

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

## MB150 New Features Update: Advanced Budgeting & Forecasting

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

## MB170\* Advanced Budgeting & Forecasting Reports

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

## MB210 Property Valuations in ABF: Introduction

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

## MB240\* Reforecasting & Advanced Features

- ◆◆ This course will cover functionality that will help you in the reforecasting process. We will review various features that allow you to move data into your budget or valuation, as well as best-practice recommendations. We will also review some of the more advanced features of Advanced Budgeting & Forecasting

such as rollups, GL allocations, cash budgeting, functions groups, debt, and jobs. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

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

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

## MB280\* Advanced Budgeting & Forecasting: Forecast Leasing Options

- ◆◆ This class will cover some examples of forecasting formulas, such as custom management fees and utilities with fixed percentage charges. In these examples, the Advanced Budgeting & Forecasting formula and model tools work together to help you quickly calculate amounts and post them to budget accounts. We will also review how to use the models with function groups for additional scalability. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

## MC<sup>+</sup> Development Roundtable: Construction

- ◆◆ This two-hour session is conducted by the Construction Management team and will showcase the latest features in Yardi Construction Management, including job costing. The session also features an open forum for questions on enhancements and future roadmap topics.

## MC010 Job Cost & Construction Management: Introduction

- Join this session to learn the value of utilizing Job Cost and Construction across your organization. Learn how to plan, budget, and capitalize any type of project, and even create fixed assets. See how construction management can be used for ground-up development, tenant improvements, or any CAPEX project.

## MC120 Construction Setup

- ◆ This three-part course will cover all of job costing in Yardi Construction Management, from setup to job close. Topics included: part 1 - core setup, categories, jobs, and budgets/revisions; part 2 - contracts/COs, retention, JEs, reclass, and JCAs; part 3 - job lists, master job allocation, job cost adjustments, releasing retention, and job close. (Three-part session)

## MC210 Construction Draws & Receivables

- ◆◆ This course covers the construction draw and AR process. We will cover setup of single and multiple funding sources, creating and submitting draw sheets, tracking receivables, income, and retention.

# Modules

## MC240 Construction Reporting



This course will give specific tips and techniques on using the job cost analytics functionality effectively. We will also have a discussion on custom job cost analytics and correspondence for creating contracts and requesting payment documents.

## MC320 Construction Forecasting



This advanced course will cover the Forecasting feature within Yardi Construction Management. Topics include calculating cost to complete and projected final costs, as well as cash flow forecasting by job and the forecast integration to Advanced Budgeting & Forecasting.

## MC330\* Construction Management for the Job Site



This course will cover the new Construction Management tablet application for the on-site project manager. We will discuss real time data, tasks, milestones, Gantt charts, and graphics.

## MG110 Legal Module



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

## MI110 Inspections: Introduction



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

## MI350 Inspections: New Features & Committee



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

## MM Maintenance: New Features & Committee



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

## MM010\* Advanced Maintenance: Introduction



See the tools in Yardi Advanced Maintenance that allow you to facilitate your daily service requests and execute your planned preventative maintenance. Yardi's integrated facilities products and mobile apps allow you to be efficient and mobile.

## MM020\* Facility Manager for Commercial: Introduction



Introducing a new UI and purpose-built application for chief engineers, technicians, and asset managers of commercial buildings. Learn about a streamlined and simple way to create equipment, maintenance plans, inspections, and work orders.

## MM112 Maintenance: Work Order Overview



This course covers how to use Voyager work orders to manage your day-to-day service requests, maintenance tasks, staff, and materials. We will review work order analytics, various dashboards, and the assignment to completion process of a work order.

## MM130\* Maintenance Mobile: Overview & Setup



This class will cover the configuration of Yardi Maintenance Mobile for both Android and iOS devices. Topics will include using the reassignment status as well as multi-technician work orders. We will also review recent updates to the app.

## MM156 Inventory Control: Overview



This course covers the Yardi Inventory Control module, which greatly enhances the inventory management capabilities of Voyager. We will cover the advantages of using this tool and the process used to set up, manage, and report on your inventory.

## MM157 Fixed Assets: Overview



This course details the Yardi Fixed Assets module. The instructor will review proper module setup and usage, including how to create fixed assets and how to calculate, post, and report on depreciation.

## MM210 Maintenance Implementation & Setup



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

## MM320 Advanced Maintenance: Overview



Learn about Yardi Advanced Maintenance, which integrates all of Yardi's facilities products. Review the creation of planned preventative maintenance tasks and template libraries and the power of auto-scheduling with the advanced scheduler. Gain on-the-go monitoring and oversight with Yardi Facilities Manager and Maintenance

# Modules

Manager Mobile. Topics will also include the streamlined processing of service requests exclusively via app.

## MR050\* Development Roundtable: Concierge

- ◆ Join members of the Concierge support and development teams along with other clients currently using the Concierge products to discuss existing functionality and contribute your ideas and concerns for future releases.

## MR110 Concierge

- ◆ Join us to learn about Yardi Concierge, a tablet-optimized module that is becoming increasingly popular. Learn how these features can assist you with guest relations, delivery notifications, guest authorizations, key authorizations, incident reporting, resident away notifications, and the reservation system.

## MR220\* Concierge: RENTCafé & Advanced/New Features

- ◆◆ Concierge functionality is also part of RENTCafé. Learn how residents can book amenities, view their packages, set away notices, identify their guests, and see who has been issued keys.

# Multifamily

## RM010 Spotlight on Multifamily

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

## RM020 RENTmaximizer

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

## RM040 ScreeningWorks Pro: Introduction

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

# Multifamily

## RM045\* Experian RentBureau & Resident Screening

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

## RM070 Yardi Matrix for Residential

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

## RM116 Prospect Guest Card & Leasing Workflow

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

## RM160 ResidentShield Renters Insurance

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

## RM210 Getting the Most Out of RENTmaximizer

- ◆◆ This session will cover best-practice settings for a wide range of areas including new features recently released for RENTmaximizer. Specifically, we will be covering reporting changes, new renewal options, and new trending options.

## RM220 Residential Analytics

- ◆◆ Learn the nuts and bolts of the Voyager operational reporting system by drilling into each section of the box score (availability, resident activity, and traffic) and understanding how they relate to your onsite success. Supporting reports covered will include Conversion Ratios, Unit Availability, Resident Activity, and Traffic

# Multifamily

Detail. We will also discuss the capability to store portfolio-level residential KPIs to use for custom reports.

## RM225 Lease Renewals



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

## RM230 Move-Ins & Transfers



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

## RM235 Move-Out Process



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

## RM240<sup>†</sup> Property Takeover & Conversion



When you're taking over a property, how do you manage the process, where do you start, and what tools should you use? This course provides an overview and discussion on how to manage the takeover process. We will cover logistics, an overview of tools, and validating your data.

## RM242\* Y2Y Conversion Tool



Simplify residential property takeovers from another Yardi database using the Yardi to Yardi (Y to Y) tool. This tool puts you in the driver seat to complete the process from beginning to end. We will cover the steps to export and import property data via XML, map chart of accounts and change codes directly in Voyager, and current and historical trial balances.

## RM250 Orion Business Intelligence for Multifamily



Discover how Yardi Orion Business Intelligence for multifamily provides a browser-based business intelligence platform to report on your entire portfolio. This course will introduce the Orion platform built from your Voyager database. Learn how you can use Orion to see the trends and performance of your entire business with amazing ease and speed. During this class you will be introduced to the VoyagerPlus environment, user dashboard interaction, an overview of available multifamily metrics, and the implementation process for Orion.

## RM260 ScreeningWorks Pro: Best Practices



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

## RM315 Late Fees



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

## RM340 Residential Best Practices



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

## RM350<sup>†</sup> Orion Business Intelligence Setup for Administrators



Are you currently implementing or planning to implement Yardi Orion Business Intelligence for multifamily? Join us to learn about what is involved with setting up and maintaining Orion Business Intelligence for multifamily companies. This course, designed for administrative users but informative for all, will cover setup and implementation steps followed by a dive into personalizing content for end users. We'll cover everything from user management to data configuration, ending with an introduction to our customization toolset.

## Panel Discussions

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



Listen to a panel of clients discuss their experiences with the Advanced Budgeting & Forecasting (ABF) functionality in Voyager. You'll learn new tips and tricks developed by Yardi experts and your peers, and have the opportunity to ask questions of the panel participants.

### PN180 Using RENTCafé CRM: Insider Tips & Client Insights



Listen to a panel of clients discuss their experiences with RENTCafé CRM. You'll have the opportunity to ask questions and learn about new tips and tricks developed by Yardi experts and your peers.

# Panel Discussions

- PN240\* **Convenient Tenant Portal Tips from COMMERCIALCafé Insiders**
- ❖ Listen to a user panel discuss their experience with COMMERCIALCafé, and learn insider tips for making the most of the convenient tenant portal functionality.
- PN320 **The Orion BI Experience: A User Perspective**
- ❖ Listen to a panel of clients discuss their experiences with Orion Business Intelligence. You'll learn new tips and tricks developed by Yardi experts and your peers, and have the opportunity to ask questions of the panel participants.
- PN340 **Saving Time & Money with Procure to Pay**
- ❖ Yardi Procure to Pay clients discuss how they save money and time with our centralized platform, including automated procurement with Yardi Marketplace, vendor management via VENDORCafé, and invoice processing with Yardi PAYscan. Hear from clients who use the solution on a regular basis and take the opportunity to ask your questions at the end of the session.

## Peer Roundtables

- RT150 **Trainers' Roundtable**
- +
  - Join this roundtable session to share information with your training peers. We will focus on up-and-coming training techniques. What is a "flipped classroom" and will it work for your training plans?
- RT175 **Social Media Roundtable**
- ❖ Implementing an effective and engaging social media strategy is a must-have in real estate. Join us for a roundtable discussion on current social media trends and best practices and get your toughest questions answered. We will explore how to use social media to optimize your marketing efforts, boost engagement, and build community online.
- RT430<sup>†</sup> **Risk Management: Key Topics & Update**
- ❖ Join this conversation to discuss with your peers strategies for managing risk. Topics will include screening, incident management, vendor compliance, renters or tenant insurance (residential and commercial), claims management, and workman's comp insurance.

# Public Housing

- PH010 **Spotlight on PHA**
- ◆ Yardi's PHA software contains many useful tools that can significantly increase your staff's efficiency. This class will spotlight some of the recently-released product enhancements. Attend to learn what's new and what's coming in the near future for the PHA products.
- PH100\* **Voyager 6.0 to 7S: Changes to PHA Functionality**
- ◆ Discover just how much the power and flexibility of Yardi's PHA program can streamline your public housing management tasks. This introductory course will cover important PHA functionality differences between Voyager 6.0 and 7S.
- PH115\* **Public Housing Basics**
- ◆ This class will be an overview of Yardi's best practices from waiting list selection to lease-up for users of Voyager PHA.
- PH132\* **PHA Correspondence**
- ◆ This exciting new functionality gives clients the ability to automatically attach key PHA reports to applicant, tenant, and landlord records within Voyager and RENTCafé PHA.
- PH145 **RENTCafé PHA: Online Applications & Intake**
- ◆ This class will cover the latest in application management and intake workflows. Learn how RENTCafé PHA can help automate your intake workflow and provide cost savings to your agency.
- PH147 **RENTCafé PHA: Landlord & Tenant Portals**
- ◆ This course will provide a comprehensive overview of the RENTCafé PHA Tenant and Landlord Portals. Topics will include online rent payments, maintenance requests, and ledgers for tenants. HCV landlords will be able to manage bank accounts, and view inspection and payment history.
- PH148 **RENTCafé PHA: Online Recertifications**
- ◆ This interactive class will give an overview of the latest in online recertification technology using Voyager and RENTCafé PHA. Learn how you can leverage Yardi software to significantly reduce costs and create efficiency.
- PH175\* **Housing Choice Voucher Basics**
- ◆ This class will be an overview of Yardi's best practices from waiting list selection to lease-up for participants on the Housing Choice Voucher program.

# Public Housing

**PH190\*** **RENTCafé PHA: Site Manager**  
◆ RENTCafé Site Manager allows agencies to monitor and electronically communicate with participants. Learn to effectively use Site Manager to manage users, notifications, and other critical functions.

**PH195\*** **RENTCafé PHA: Panel Discussion**  
◆ This panel discussion will include current users of RENTCafé PHA. Learn best practices, potential pitfalls, and efficiencies gained by existing users of this exciting product.

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

**PH234\*** **FSS Basics for PHA**  
◆◆ Learn how to use the Family Self Sufficiency (FSS) functionality in Voyager to effectively manage your FSS participants from enrollment to exit and everything in between.

**PH239\*** **Opening Large HCV Waiting Lists: Best Practices**  
◆◆ This course will guide participants through the complexities of opening a large Housing Choice Voucher waiting list and includes best practices, online application and notification procedures, as well as lottery options.

**PH258\*** **Waiting List Maintenance & Updates**  
◆◆ The PHA waiting list functionality has been rewritten to improve options and functionality for wait list purging. This class will cover processing for online wait list purging as well as purging via bar-coded letters.

**PH320<sup>†</sup>** **Managing PHA/Affordable Combination Properties**  
◆◆◆ This class will explore how to manage layered 50058/Tax Credit/HOME/Market Rate properties within Voyager 7S. Topics covered will include the latest changes for identifying discrepancies in Tax Credit/PBV and HCV properties.

**PH325** **Portability Finance**  
◆◆◆ This class will include detailed discussions regarding PHA portability finance management. Learn about the use of suspense charges in portability receipting, how to manage admin fee updates, and other critical functions for successfully managing portability.

**PH345** **PHA Demographics & Waiting List Analytics**  
◆◆◆ This session is a review of the newly-enhanced PHA demographics, which have been expanded to encompass all PHA program types and waiting list analytics reports.

**PH930\*** **HUD Update: UPCS-V**  
◆ Please join Yardi and HUD staff for an overview and update on the progress of the UPCS-V demonstration program. This exciting session will review HUD's proposed changes to the Housing Choice Voucher protocols and a brief discussion of Yardi's future plans to incorporate those changes into the Voyager product.

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

## Reporting

**RE050** **Reporting Panel**  
+ This class is a Q&A session with Yardi technical staff about the various reporting options available in Voyager. We will cover everything from simple Yardi SQL scripting to high-end presentations available when using Yardi Orion Business Intelligence. You'll also learn the degree of customizations possible with Voyager analytics, SSRS, FillDocs, ad hoc tools, and Yardi Spreadsheet Reporting. We'll help you make sense of the Voyager reporting options and guide you to the YASC courses you should attend, thus empowering you to make savvy technology reporting decisions.

**RE060** **Yardi Spreadsheet Reporting Overview**  
◆ Yardi Spreadsheet Reporting (YSR) is a Voyager technology that enables report designers to create report packets of individual documents designed in Microsoft Excel or Word. This class will offer an overview of the capabilities of this product, including the simple setup procedures, and is designed to help you gain an understanding of how YSR can be used to create boardroom-quality reports.

**RE110** **Basics of Database Schema & SQL**  
◆ Do you want to learn more about SQL queries and the Yardi database structure but don't know where to begin? Attend this course, which introduces you to the Yardi database tables and educates you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

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

# Reporting

## RE161 Correspondence for Residential

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

## RE170 Introduction to Custom Financial Analytics

- ◆ This course is an introduction to Yardi's custom analytics and provides information on how to create your own financial analytic-type custom financials. Learn how to create account tree and property comparison templates using either standard or custom account trees. We will cover topics such as how to compare financial data from prior periods to the current period and how to compare similar data across multiple properties.

## 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.

## RE250 Using YSR for Custom Financial Analytics

- ◆◆ Leverage the power of YSR and Microsoft Excel to transform custom analytics into boardroom-ready financial reports. This class will teach you how to turn reports created using the custom analytic engine into Yardi's exciting reporting technology, YSR.

## RE261 Residential Tenant Letters, Notices, & Leases

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

## RE270\* Intermediate Custom Financial Analytics

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

## RE370 Advanced Custom Financial Analytics

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

## RE405 Reporting Comparison Between YSR & SSRS

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

## RE505 SQL Scripting

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

## RE540 Yardi Spreadsheet Reporting Technical Session: Part 1

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

## RE541 Yardi Spreadsheet Reporting Technical Session: Part 2

- ◆◆ A follow-on session to RE540, suitable for those tasked with designing custom reporting solutions with Yardi Spreadsheet Reporting on the Voyager or VoyagerPlus platform. We'll include further demonstrations of newer features such as the filter report title values token, conditionally hiding columns in Excel, and

# Reporting

embedding database-sourced HTML in Word templates. We'll also cover more general design tips including extending analytic data sources with custom tokens and creating a Word merge token file, as well as a number of suggestions for careful implementation of formatting. We'll show the rationalized setup screens for ease of learning, and a newly released generate screen supporting collapsible filter panes to enable more on-screen visibility in Voyager 7S.

## RE560 FillDocs



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

## RE580 SSRS Basics for Developers



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

## RE680 Advanced SSRS Features



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

# Technology

## TE020 Introduction to YardiOne



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

## TE040\* Yardi Document Management for SharePoint: Demo Session



Yardi Document Management for SharePoint provides your company with the ability to organize, control versions, store, and secure documents related to company departments as well as Voyager

# Technology

records such as properties, residents, tenants, jobs, etc. Use full-text search to easily find documents based on the name of the document or the text within the document. Additionally, learn how to publish documents such as tenant correspondence directly into the document management library.

## TE060\* Yardi Document Management for SharePoint



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

## TE140\* Property Attributes & Dynamic Property Lists



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

## TE170 Client Central Essentials



Client Central is our most useful resource for clients to access training and technical information. Learn how to access our extensive online resources, including product documentation and training videos. Find out how to create and monitor Yardi support cases and trouble requests (TRs), and manage your licensing. We'll also discuss how to administer your Client Central groups, users, and permissions.

## TE171 Client Central New Features



Client Central is constantly evolving, sporting brand new features approximately once every month. This class is your opportunity to learn about our most recent updates to Client Central. Learn how to turn on powerful add-on tools, such as ySQL and File Manager (reducing the need for a remote desktop session), perform your own live-to-test restores, and new reports for our SOX clients. You will also hear about the features currently in development that will be coming out later this year.

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



Voyager provides a variety of ways to customize information and to personalize how it appears on the screen. Join us to learn how to enable user-defined fields for storing additional data, as well as how to create custom tables to control the formatting, field requirements, and layout of a screen containing additional data.

## TE215 System Administration Toolbox



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

# Technology

## TE230 Transaction & Budgets Import/Export



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

## TE245 Automated Tasks & Notifications



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

## TE310 Advanced Voyager Menu Security



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

## TE335 Advanced SQL Scripting



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

## TE360 Voyager Standard Interfaces Overview



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

# Vertical Markets

## AS050 Voyager Condo, Co-op, & HOA Demo



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

# Vertical Markets

## AS100 Voyager Condo, Co-op, & HOA Roundtable



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

## AS132\* RENTCafé Portal for Condo/HOA Clients



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

## AS134\* CONDOCafé Certificates



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

## CH020\* Yardi Corporate Housing Overview



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

## SF055 Single Family Homes: New Features & Committee



Join this committee of Voyager Single Family Homes product specialists and developers to discuss the new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added.

## SF155\* Voyager Single Family Homes & RENTCafé Basics



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

## SN060\* EHR Update and Roadmap



This course will provide an overview of recent updates to Yardi EHR for senior living that provide efficiencies and improve the end-user experience. In addition to looking back at recent changes, we'll spend some time looking forward and provide a preview of planned enhancements that are currently underway.

# Vertical Markets

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## SN070\* Senior CRM Update and Roadmap

- ◆ The Yardi Senior CRM feature set is undergoing a multi-phase process to add additional functionality. Attend this course to find out about recent enhancements that improve lead tracking and a new proposal process that seamlessly guides you through the lease-up process from within Senior CRM. The course will conclude with a discussion of future development, including integration with RENTCafé Senior Living and electronic lease signing.

## SS070 Yardi Matrix for Self Storage

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

## ST101\* Student Housing: New Features & Committee

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

## ST120 Voyager Student Housing & RENTCafé Student Housing Basics

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



#YASC2017

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