Class List

Intercontinental London | November 7 - 8

YASC (Yardi Advanced Solutions Conference) is your connection to real estate software solutions that help you grow and innovate. Including over 120 classes, YASC offers you the opportunity to stay ahead of industry trends and emerging challenges with a stimulating combination of classroom instruction, Yardi solution experts and industry peers. With in-depth insight, exclusive live entertainment and social activities, YASC is a can't-miss event for our clients!

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YASC

Infinite Possibilities

CLASS SCHEDULE - DAY 1 Tuesday, November 7th

	General Sessions	Commercial	Forecasting and Construction Management	Residential - BTR	Residential - Student	General Accounting	Procure to Pay and Facility Management	Technical Sessions	Investment Management	Flex Space	Document Management, eLearning, Energy, Bluepoint, COROM
09:00 - 10:00	OPENING SESSION										
10:15 - 11:15	N/A	Commercial Spotlight	N/A	Residential Spotlight	N/A	N/A	N/A	N/A	Investment Management Spotlight	N/A	N/A
11:30 - 12:30	**User Group and Country Compliance Update**	Elevate Deal & Retail Manager for Commercial: Overview	Elevate Forecast Manager for Commercial: Overview	Introduction to RentCafe	Introduction to Student Housing	Overview of General Accounting Features	Elevate Facility Manager for Commercial: Overview	Correspondence for Advanced Users	Intro to Investment Manager: Investor Relations & Portals	Yardi Kube Overview - Introduction to Flex Space	Pulse Energy Management and GRESB reporting
12:30 - 13:30	LUNCH										
13:30 - 14:30	Yardi Voyager 8 - Preview	Elevate Deal & Retail Manager for Commercial: Lead to Lease Process	Elevate Construction Manager for Commercial: Overview	Reach By RentCafe - Introduction	RentCaffeine Site Editor	FX - Setting up Revaluation and Translation	Yardi Procure to Pay Introduction	Reporting Tools – which one, when, why?	Fund Structures and Financial Consolidations Intro and Setup	Powerful Reporting for Flexible Workspace	Introduction to Yardi Bluepoint
14:45 - 15:45	Client Central Essentials	Voyager 8 Lease Administration Preview	Elevate Forecast Manager for Commercial: Revenue Management	Chat IQ, More Than Just a Robot	Student Exclusive Features	Bank Book	Elevate Facility Manager: Mobile App	Custom Financial Analytics	Debt Manager - Debt as a Liability Intro and Setup	Switching on Space Management - SMPRO	Introduction to Yardi Corom
16:00 - 17:00	Core System Analytic Reporting Options	Elevate Deal & Retail Manager for Commercial: Advanced Features	Elevate Construction Manager: Project Management	Optimising the RentCafe Applicant Experience (including eDocs) for BTR	International Yardi Payment Processing	Account Trees	Procure to Pay: VendorCafe Overview	Data Connect for Power BI: Introduction	Intercompany	Kube IT Implementations & Member Management	Introduction to Aspire eLearning
17:15 - 18:15	Extract, Transform, Load (ETL)	Introduction to European Service Charges	Yardi Elevate Forecast Manager for Commercial: Opex and Capex	Conventional Move-In & Transfer	UK/European Market Standards & Compliance For Residential	Importing Bank Statement and other Banking Interfaces	Integration of Facility Manager, CommercialCafe & VendorCafe	Yardi Spreadsheet Reporting (YSR) basic technical session	Performance Manager	Manage Your Flex Space	Document Management for SharePoint: Introduction

This class list is subject to change at any time.

CLASS SCHEDULE - DAY 2 Wednesday, November 8th

	General Sessions	Commercial	Forecasting and Construction Management	Residential - BTR	Residential - Student	General Accounting	Procure to Pay and Facility Management	Technical Sessions	Investment Management	Flex Space	Document Management, eLearning, Energy, Bluepoint, COROM
09:00 - 10:00	Voyager Automated Tasks & Notifications	CommercialCafe Tenant Portal: Introduction	Yardi Elevate: Integration of Construction and Forecast Manager	RentCafe Resident Services	Using Phased Properties & CLO	Straight Line Rent	Procure to Pay Best Practice	Scripted Reports	Fund Structures and Financial Consolidations Advanced	Branding for Flex Space	**REPEAT** Document Management for SharePoint: Introduction
10:15 - 11:15	**REPEAT** Yardi Voyager 8 - Preview	**REPEAT** Elevate Deal & Retail Manager for Commercial: Overview	Elevate Construction Manager: RFPs and Vendor Management	Maintenance IQ for Residential: Overview & Setup	International Bill Pay	GL Allocations	Procure to Pay: Full Service	Using YSR for Custom Financial Analytics	Debt Manager - Debt as an Asset	Yardi Kube Overview	**REPEAT** Pulse Energy Management and GRESB reporting
11:30 - 12:30	YardiOne: New Features	**REPEAT** Voyager 8 Lease Administration Preview	Elevate Valuation Manager for Commercial: Overview	Introduction to CRM IQ	Voyager Month-End Tie-Outs: AR, AP, & Security Deposits	Automating the P2P Process Using Electronic Invoicing	Elevate Facility Manager: Work Orders & Inspections	**REPEAT** Data Connect for Power BI: Introduction	**REPEAT** Intro to Investment Manager: Investor Relations & Portals	**REPEAT** Switching on Space Management - SMPRO	First Line Helpdesk Services
12:30 - 13:30	**LUNCH**										
13:30 - 14:30	Challenges facing audit, compliance & security in a digital world	Advanced Service Charges	Elevate: Integration of Deal and Forecast Manager	RentCafe CRM Queue & Lead Management	RentCafe Marketing Website Design	Fixed Assets	Yardi Payment Processing for Commercial	Basics of Database Schema	Debt Manager - Debt as a Liability - Advanced	**REPEAT** Manage Your Flex Space	**REPEAT** Introduction to Aspire eLearning
14:45 - 15:45	VAT Reporting	Connected Asset Solutions: Deal Manager, Forecast Manager, Construction Manager	Yardi Elevate Construction Manager: Capital Planning and Forecasting	Residential Roundtable	Essentials of Maintenance IQ Inspections for Residential	Month End Processing	Elevate Facility Manager: Preventative Maintenance and Equipment	Basics of Database Schema for Student	IM - Calculator Analytics Advanced	**REPEAT** Kube IT Implementations & Member Management	Energy Management Roundtable
16:00 - 17:00	Overview of Core Analytics & Reporting Options	Yardi Elevate Deal & Retail Manager for Commercial: Managing Deal and Lease Documents	Elevate Forecast Manager for Commercial: Reports	Conventional Lease Renewals	Advanced Yardi Payment Processing & Bank Reconciliation	**REPEAT** Bank Book	**REPEAT** Elevate Facility Manager for Commercial: Overview	Advanced Database Schema	Investment Management - Batch Allocations	**REPEAT** Powerful Reporting for Flexible Workspace	**REPEAT** Introduction to Yardi Bluepoint

This class list is subject to change at any time.

CLASS OVERVIEW

General
User Group and Country Compliance Update
Yardi Voyager 8 - Preview
Client Central Essentials
Core System Analytic Reporting Options
Extract, Transform, Load (ETL)
Voyager Automated Tasks & Notifications
YardiOne: New Features
Challenges facing audit, compliance & security in a digital world
VAT Reporting
Overview of Core Analytics & Reporting Options

Commercial
Commercial Spotlight
Elevate Deal & Retail Manager for Commercial: Overview
Elevate Deal & Retail Manager for Commercial: Lead to Lease Process
Voyager 8 Lease Administration Preview
Elevate Deal & Retail Manager for Commercial: Advanced Features
Introduction to European Service Charges
CommercialCafe Tenant Portal: Introduction
Advanced Service Charges
Connected Asset Solutions: Deal Manager, Forecast Manager, Construction Manager
Elevate Deal & Retail Manager for Commercial: Managing Deal and Lease Documents

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CLASS OVERVIEW

Forecasting and Construction Management

Elevate Forecast Manager for Commercial: Overview

Elevate Construction Manager for Commercial: Overview

Elevate Forecast Manager for Commercial: Revenue Management

Elevate Construction Manager: Project Management

Elevate Forecast Manager for Commercial: Opex and Capex

Elevate: Integration of Construction and Forecast Manager

Elevate Construction Manager: RFPs and Vendor Management

Elevate Valuation Manager for Commercial: Overview

Elevate: Integration of Deal and Forecast Manager

Elevate Construction Manager: Capital Planning and Forecasting

Elevate Forecast Manager for Commercial: Reports

Residential - BTR

Residential Spotlight

Introduction to RentCafe

Reach By RentCafe - Introduction

Chat IQ, More Than Just a Robot

Optimising the RentCafe Applicant Experience (including eDocs) for BTR

Conventional Move-In & Transfer

RentCafe Resident Services

Maintenance IQ for Residential: Overview & Setup

Introduction to CRM IQ

RentCafe CRM Queue & Lead Management

Residential Roundtable

Conventional Lease Renewals

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CLASS OVERVIEW

Residential - Student

Introduction to Student Housing

RentCaffeine Site Editor

Student Exclusive Features

International Yardi Payment Processing

UK/European Market Standards & Compliance For Residential

Using Phased Properties & CLO

International Bill Pay

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

RentCafe Marketing Website Design

Essentials of Maintenance IQ Inspections for Residential

Advanced Yardi Payment Processing & Bank Reconciliation

General Accounting

Overview of General Accounting Features

FX - Setting up Revaluation and Translation

Bank Book

Account Trees

Importing Bank Statement and other Banking Interfaces

Straight Line Rent

GL Allocations

Automating the P2P Process Using Electronic Invoicing

Fixed Assets

Month End Processing

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CLASS OVERVIEW

P2P and Facility Management
Elevate Facility Manager for Commercial: Overview
Yardi Procure to Pay Introduction
Elevate Facility Manager: Mobile App
Procure to Pay: VendorCafe Overview
Integration of Facility Manager, CommercialCafe & VendorCafe
Procure to Pay Best Practice
Procure to Pay: Full Service
Elevate Facility Manager: Work Orders & Inspections
Yardi Payment Processing for Commercial
Elevate Facility Manager: Preventative Maintenance and Equipment

Technical
Correspondence for Advanced Users
Reporting Tools – which one, when, why?
Custom Financial Analytics
Data Connect for Power BI: Introduction
Yardi Spreadsheet Reporting (YSR) basic technical session
Scripted Reports
Using YSR for Custom Financial Analytics
Data Connect for Power BI: Introduction
Basics of Database Schema
Basics of Database Schema for Student
Advanced Database Schema

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CLASS OVERVIEW

Investment Management

Investment Management Spotlight

Intro to Investment Manager: Investor Relations & Portals

Fund Structures and Financial Consolidations: Intro and Setup

Debt Manager - Debt as a Liability: Intro and Setup

Intercompany

Performance Manager

Fund Structures and Financial Consolidations: Advanced

Debt Manager - Debt as an Asset

Debt Manager - Debt as a Liability - Advanced

IM - Calculator Analytics Advanced

Investment Management - Batch Allocations

Flex Space

Yardi Kube Overview - Introduction to Flex Space

Powerful Reporting for Flexible Workspace

Switching on Space Management - SMPRO

Kube IT Implementations & Member Management

Manage Your Flex Space

Branding for Flex Space

Kube IT Implementations & Member Management

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CLASS OVERVIEW

Document Management, eLearning, Energy, Bluepoint, COROM

Pulse Energy Management and GRESB reporting

Introduction to Yardi Bluepoint

Introduction to Yardi Corom

Introduction to Aspire eLearning

Document Management for SharePoint: Introduction

First Line Helpdesk Services

Energy Management Roundtable

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Yardi Partner Zone

Returning for 2023!

We are excited to announce that this years YASC will one again feature a special meeting and exhibition zone that enables you to meet with our independent consultant partners. The zone is located on the first floor foyer area in front of the main hall.

CLASS DESCRIPTIONS - GENERAL

User Group and Country Compliance Update

Learn more about our various Country User Groups, their current key focus and recent achievements. In addition, find out about Yardi's focus on local compliance in the various countries and what information is available to assist you with your compliance

Yardi Voyager 8 - Preview

New for 2023: Voyager 8 is coming soon with significant updates to the Voyager 7S experience. This introduction to Voyager 8 is an overview of how the new user interface organises its functions around AR, AP, GL, reporting, and much more. For commercial, learn about our simplified user interface for data entry and review, managing collection efforts, and tracking insurance requirements. All of this is packaged in an intuitive and simplified look and feel. Voyager 8 is coming soon and is positioned to help you navigate the future of infinite possibilities.

Extract, Transform, Load (ETL)

This course will take you through the key components required to secure the correct configuration of our extract, transform, load functionality. The class also covers exporting and importing the various data objects.

Client Central Essentials

Client Central has long been a useful resource for clients to access training and technical information. This class is your opportunity to learn about our recent updates to the Client Central system. Learn how to access our extensive online Knowledge Base, including product documentation, training videos, and other resources. Find out how to create and monitor Yardi support cases and trouble requests (TRs) and manage your Yardi Cloud environment - from accessing performance statistics to implementing Cloud requests and approvals. We'll also discuss how to administer your Client Central groups, users, and permissions.

Core System Analytic Reporting Options

This course provides business users an overview of the core analytics and reporting options available in the system. You will discover how smart configuration and filtering options assist you in widening your reporting options without the need to create customised reporting.

Voyager Automated Tasks & Notifications

This class will show 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.

Challenges facing audit, compliance & security in a digital world

This course will provide an update on the security measures Yardi is taking to protect client data both technically and legally. It will also include suggested areas clients should consider to apply as part of their own security protocols in relation to Yardi held data.

YardiOne: New Features

Ever wish you didn't have to enter your credentials each time you access a Yardi program? Do you wish there was a way to easily access all your Yardi applications in one place? If you answered yes, then YardiOne is for you! This class will cover what YardiOne is, what the user's experience is like, and why you should use YardiOne for your company. If you're a system administrator or just want to learn more about YardiOne, join us!

VAT Reporting

This class will cover Voyager 7S International functionality. This includes tax setup (tax authority, tran type, tax rates), system-level tax setup, legal entities, and international transactions.

Overview of Core Analytics & Reporting Options

This course provides business users an overview of the core analytics and reporting options available in the system. You will discover how smart configuration and filtering options assist you in widening your reporting options without the need to create customised reporting.

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CLASS DESCRIPTIONS - COMMERCIAL

Commercial Spotlight

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

Elevate Deal & Retail Manager for Commercial: Overview

This class will explore the features and benefits of Deal Manager, which centralises deal entry, tracking and approvals in one simple-to-use solution for brokers and asset managers. Ideal for office, industrial and retail clients, Deal Manager significantly improves workflows for internal and external brokers while providing enhanced deal pipeline visibility to asset managers and other stakeholders.

Elevate Deal & Retail Manager for Commercial: Lead to Lease Process

Ideal for office, industrial and retail clients, Deal Manager significantly improves workflows for internal and external leasing teams, while providing enhanced deal pipeline visibility. This class will explore how Deal Manager can help the leasing team to manage the lead to lease process, and enable them to close the best possible deals.

Voyager 8 Lease Administration Preview

New for 2023: This class will explore the features and benefits of Commercial Voyager 8, a robust solution designed to help manage all aspects of commercial lease administration. Join this class to learn about the Voyager 8 simplified user interface for data entry and review, along with tools for analysing and reporting on portfolio health, managing collection efforts, tracking insurance requirements and compliance, and much more.

Elevate Deal & Retail Manager for Commercial: Advanced Features

Ideal for office, industrial and retail clients, Deal Manager significantly improves workflows for internal and external leasing teams, while providing enhanced deal pipeline visibility. This class will cover a variety of topics to further extend the usability of the solution, including workflow features, floor plans, defining master leases and default commissions.

Introduction to European Service Charges

This class gives an introduction to the European Service Charge module. We will provide an overview of the key components needed to set up for service charges in Voyager.

CommercialCafe Tenant Portal: Introduction

Explore how CommercialCafe Tenant Portal can deliver best-in-class tenant services including 24/7 access to online payments, statements, maintenance requests, sales data entry and other service offerings.

Advanced Service Charges

This class will guide you through the steps of the period end service charge reconciliation process and introduce you to advanced service charge reporting options.

Connected Asset Solutions: Deal Manager, Forecast Manager, Construction Manager

New for 2023: In this session, we will explore the critical interplay between budgeting, leasing and construction projects and their impact on optimising asset performance within commercial portfolios. We will focus on equipping you with the necessary tools to achieve transparency, accuracy, and actionable insights at each phase of the process. By integrating live data from leasing pipelines and construction projects into your budgeting solution, you will gain the ability to manage forecasts dynamically without the burden of constantly updating multiple spreadsheets. This streamlined approach ensures that you can make informed decisions based on real-time information, enhancing your ability to maximise asset performance.

Elevate Deal & Retail Manager for Commercial: Managing Deal & Lease Documents

Ideal for office, industrial and retail clients, Deal Manager significantly improves the lead to lease workflow for the leasing team while providing enhanced deal pipeline visibility. This class will dive into how the system can help you efficiently generate lease documents with all the deal terms. In addition, the class will walk through the team collaboration features, which can help you easily track and compare revisions to the deal agreements.

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CLASS DESCRIPTIONS - FORECASTING AND CONSTRUCTION MANAGEMENT

Elevate Forecast Manager for Commercial: Overview

Part of Yardi Elevate, Forecast Manager connects leasing, asset management, and finance teams to the budgeting process and eliminates back-and-forth emails and outdated assumptions. This class will explore the solution's features and benefits.

Elevate Construction Manager for Commercial: Overview

Part of Yardi Elevate, Construction Manager provides real-time insight into budget performance and the construction timeline. This class will provide a high-level look at Construction Manager's features and benefits.

Elevate Forecast Manager for Commercial: Revenue Management

Learn about revenue-focused Forecast Manager functionality, including the Revenue Dashboard, integration with Deal Manager, area management and reporting. The Revenue Dashboard allows users to easily identify units that may require leasing assumptions (vacant units, units with expiring leases, etc.) and easily enter their assumptions into the budget. Integration with Deal Manager provides visibility into deals in the pipeline and allows users to build a budget based on those deals. The area management dashboard allows users to speculatively change the area of units on a property for budgeting purposes. The class will also review the detailed and flexible Lease Status Report, along with other lease and unit reporting.

Elevate: Integration of Deal and Forecast Manager

New for 2023: This class will show how pipeline deals created in Deal Manager show as leasing assumptions in Forecast Manager. You can forecast revenue, recoveries and costs based on the terms outlined in the deal with one click in Forecast Manager. The class will also cover a deal's progress through its lifecycle, including notifications in Forecast Manager when a counterproposal is entered in Deal Manager. Lastly, we'll show how Deal Manager compares deals to Forecast Manager speculative tenants or market rates for a given space.

Elevate Construction Manager: Project Management

Part of Yardi Elevate, Construction Manager shows job cost data in a new way for asset, development, and project managers. Join this class to learn how Construction Manager takes job data to a new level by tracking milestones, assigning risk levels, calculating cost per square foot and much more.

Elevate Forecast Manager for Commercial: Opex and Capex

Learn how Forecast Manager elevates operating expenditure functionality with two different ways of entering details and pulling in historical GL data to seed your forecast. We'll also cover the solution's capital expenditure features, including a new visual dashboard to slice and dice the different types of CAPEX data and keep it synchronised across all budgets. The solution's seamless integration with Construction Manager for job and capital planning functionality will be reviewed, as well as the link to the leasing cost generated from deals, leases and MLAs.

Yardi Elevate: Integration of Construction and Forecast Manager

New for 2023: Learn about the lifecycle of current and planned capital jobs as they flow between these two Elevate modules. You'll leave this class understanding how to create your wish list of anticipated spending using the Capital Planning tool in Construction Manager; pull that list and in-progress jobs into your overall property budgets using the easy sync tool in Forecast Manager; approve capital planning and convert it into actual jobs that you will transact against; and re-sync in Forecast Manager to see those newly created jobs reflected in your property budgets.

Elevate Construction Manager: RFPs and Vendor Management

Learn how you can simplify and streamline the process of bidding out work to vendors. Construction Manager lets you manage the entire process from sending out an RFP and awarding a contract to paying the vendor.

This class list is subject to change at any time.

CLASS DESCRIPTIONS - FORECASTING AND CONSTRUCTION MANAGEMENT

Elevate Valuation Manager for Commercial: Overview

Looking for an easier way to determine the market value of your commercial properties or potential acquisitions and dispositions? Join this class to learn about an easy-to-use DCF tool that integrates seamlessly with budgets, leasing, construction jobs, capital planning and other areas of your business managed in Yardi. See how reporting is linked to explain calculations and takes the black box out of valuations.

Elevate: Integration of Deal and Forecast Manager

New for 2023: This class will show how pipeline deals created in Deal Manager show as leasing assumptions in Forecast Manager. You can forecast revenue, recoveries and costs based on the terms outlined in the deal with one click in Forecast Manager. The class will also cover a deal's progress through its lifecycle, including notifications in Forecast Manager when a counterproposal is entered in Deal Manager. Lastly, we'll show how Deal Manager compares deals to Forecast Manager speculative tenants or market rates for a given space.

Elevate Forecast Manager for Commercial: Reports

Learn about the reporting tools available in Forecast Manager, including financial-based reports that show the overall budget numbers and the details behind them. The class will cover commercial-based reports that show the detail behind revenue and occupancy figures. Also on the agenda is the Lease Status Report, a popular report in Forecast Manager that shows forecasted leasing activity, with many options for configuring the report to the organisation's needs.

Elevate Construction Manager: Capital Planning and Forecasting

Join this class to learn how the Construction Manager Capital Planning feature allows your team to keep a running list of capital expenditure (CAPEX) requests for building maintenance, upgrades, tenant improvements, or any other anticipated spend. This feature can capture up to 10 years of budgeting requests, offer seamless job creation, and integrate with Forecast Manager and Valuation Manager. Also explore how easy job forecasting can be with the new look and functionality in Elevate Construction Manager.

This class list is subject to change at any time.

CLASS DESCRIPTIONS - RESIDENTIAL - BTR

Residential Spotlight

Discover the Residential Suite's latest developments and roadmap. Get a sneak peek at what's happening with Voyager Residential, the RentCafe Suite (RentCafe, RentCafe CRM, REACH by RentCafe, and RentCafe Connect), Resident Screening, Procure to Pay and more. This class offers a preview of additional classes in each area.

Introduction to RentCafe

Do you own or manage residential units but don't use RentCafe? If so, please join this review of RentCafe Marketing Sites, Resident Portal, CRM Flex, and more! Note: This overview is directed to clients not licensed for or using RentCafe.

Reach By RentCafe - Introduction

New for 2023: REACH by RentCafe is an award-winning, full-service digital marketing agency. Learn how REACH can become a skilled extension of your marketing department, providing tools and experience to help you create a winning web presence, reach your target customers and analyse and adjust your marketing strategy. Hear how REACH can help with creative design, search strategies, improving your online reputation and visualising your results with an intuitive marketing analytics dashboard.

Chat IQ, More Than Just a Robot

New for 2023: Want to learn how you can provide 24/7 customer service? RentCafe Chat IQ is a smart bot that can chat, email, text, and call prospects and residents, improving the customer experience and freeing your team to focus on high-priority tasks.

Optimising the RentCafe Applicant Experience (including eDocs) for BTR

Learn how to make the online application process more intuitive and easier to navigate. This class covers administrative configuration that enhances the leasing workflow. Start increasing your online activity today!

Voyager Automated Tasks & Notifications

This class will show 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.

Conventional Move-In & Transfer

Learn how to process move-ins and transfers with ease! This class includes an overview of the RentCafe CRM Flex workflow from the property's viewpoint. We cover required settings and workflows for move-ins, transfers, and roommate promotions.

Introduction to CRM IQ

New for 2023: CRM IQ is Yardi's newest evolution in customer relationship management solutions, providing centralised communication management, seamless integration with RentCafe Conversations, and an enhanced lead-to-customer management experience. This class offers a look at CRM IQ and the various tools it offers to streamline your everyday tasks.

RentCafe Resident Services

Learn about all the different ways a resident can interact with a property and access RentCafe. We will also look at all of the ways to customise the resident experience and improve resident retention.

Maintenance IQ for Residential: Overview & Setup

Preserving the value of your properties is essential to long-term profitability, and work orders are a key part of the preservation process. This comprehensive class covers WO templates, entering "quick" WOs, tracking inventory, preventive maintenance, managing maintenance staff, recurring WOs, and posting WOs to create charges and payables.

RentCafe CRM Queue & Lead Management

Join us as we take a deep dive into lead tracking with RentCafe CRM Flex. This class focuses on executing follow-ups, managing queues with an emphasis on the prospect lifecycle, and boosting leasing initiatives at your property.

Conventional Lease Renewals

This class is an overview of the RentCafe lease renewal workflow from both the resident's and property's viewpoint. We'll cover the settings required to enable this workflow and the setup steps for lease proposals in Voyager. Lastly, we'll cover how to accept the lease proposal, and how to sign and countersign the renewal lease.

Residential Roundtable

For existing clients that use our residential products only.

This class list is subject to change at any time.

CLASS DESCRIPTIONS - RESIDENTIAL - STUDENT

Introduction to Student Housing

Do you have student housing properties in your portfolio? RentCafe CRM Flex provides all the functionality you need to operate a student property and includes unit, room, and bed-level rental capabilities. This class will review the student application workflow including expanded guarantor functionality and bulk functions. It will also cover key student functions such as academic terms, roommate matching, and tiered renewals.

RentCaffeine Site Editor

This class showcases basic RentCafe Site Editor tools and introduces intermediate-level features and functionality. It's designed for marketing managers to create a unique web presence through visual customisations that meet their brand's requirements. Learn how to customise the property website's standard template with layout structure, branding colours, images, text and custom inner pages. We dive into how to use the widget gallery in the property's website design. In addition, discover the various RentCafe marketing features that are only available within our RentCaffeine framework.

Student Exclusive Features

Want to learn how you can provide 24/7 customer service? RentCafe Chat IQ is a smart bot that can chat, email, and text prospects and residents, improving the customer experience and freeing your team to focus on high-priority tasks.

International Yardi Payment Processing

Join this introductory class to learn about using Yardi Online Payments to establish paperless self-service rent payments with a recurring payment option. See how residents can log in at any time, view account balances, and pay charges directly via direct debit or with a credit or debit card.

UK/European Market Standards & Compliance for Residential

Get an overview of our approach towards helping clients be compliant in various jurisdictions, available solutions for clients and ongoing and planned initiatives.

Using Phased Properties & CLO

New for 2023: This class will examine different methods of marketing and managing properties using a phased property approach and a centralised leasing office (CLO). Take a deep dive into a prospect-centered approach to property management. Learn how to market properties within a region using the centralised leasing office framework. See how RentCafe can optimise how your communities are set up.

International Bill Pay

This class focuses on introduction to Vendor Payments functionalities using Yardi Payment Processing. In this class we will cover the advantages of using BillPay and show how you can now manage their payables (to vendors) digitally via BillPay.

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

New for 2023: Month-end can be a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks easily, smoothly, and without hassle!

RentCafe Marketing Website Design

New for 2023: Learn how to take the visual appeal of your website into your own hands. This class teaches you how to implement simple features that give properties a strong online presence. We'll discuss all you need to know about capturing your target audience with built-in and intuitive RentCafe functionality.

Essentials of Maintenance IQ Inspections for Residential

Interested in reducing unit turn times and increasing asset value? Preview Yardi's latest innovation in unit turns and inspections. This session will show how tracking unit turn milestones delivers unparalleled insight into your make-ready process. Learn how one-click integration with Marketplace simplifies equipment replacement.

Advanced Yardi Payment Processing & Bank Reconciliation

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

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CLASS DESCRIPTIONS - GENERAL ACCOUNTING

Overview of General Accounting Features

This course is an overview of financial features 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 operations.

FX - Setting up Revaluation and Translation

Learn how to handle key currency conversions during the month-end closing of a single entity or within a consolidation. The revaluation function will cover the ability to update the base currency position at month end for non-base currency balance sheet items. The multi-currency translation function covers conversion from entity base currency to a different consolidation or reporting currency.

Bank Book

Bank Book in Voyager records all transactions in a bank statement with a single entry process and includes payments, receipts, and other bank transactions. In addition to processing transactions, bank book also has built-in bank reconciliation functions and tieout reports. This course will also cover how advanced features deal with more difficult transactions like reversals, credits, unknown receipts, and how to apply those at a later stage.

Automating the P2P Process Using Electronic Invoicing

Learn more about managing eInvoicing requirements throughout multiple jurisdictions in Europe and how we help clients deal with these requirements with a single connected solution.

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 time by streamlining and customising your report-writing processes.

Importing Bank Statement and other Banking Interfaces

This class covers two types of bank interfaces. The first type comprises electronic fund transfer files, which include supplier payments and direct debits. The second involves importing bank statements in Voyager, and we will discuss reconciliation capabilities handled through the use of regular expressions in Bank Book.

GL Allocations

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

Straight Line Rent

Learn how to implement FASB 13 and automate straight-lining of rents in Voyager's Commercial module. This course will cover features associated with basic configuration, calculation of amortisation 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.

Fixed Assets

This class details the Fixed Assets module. The instructor will review setup and usage, including creating fixed assets and calculating, posting and reporting on depreciation.

Month End Processing

Month-end can be a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks easily, smoothly, and without hassle.

This class list is subject to change at any time.

CLASS DESCRIPTIONS - P2P AND FACILITY MANAGEMENT

Elevate Facility Manager for Commercial: Overview

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

Yardi Procure to Pay Introduction

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

Elevate Facility Manager: Mobile App

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

Integration of Facility Manager, CommercialCafe & VendorCafe

New for 2023: This class will demonstrate the end-to-end solution for work orders from CommercialCafe to Facility Manager to VendorCafé. Tenants can utilise their CommercialCafe portal to create and manage work orders as well as approve estimates for work requested. Facility Manager users can direct assign or request bid proposals from third party vendors via VendorCafe.

Procure to Pay: VendorCafe Overview

This course provides an overview of Yardi's solution focused on helping our clients manage their important relationships with vendors. VendorCafe is part of the Procure to Pay product suite, and provides a portal that allows vendors to submit W-9s, COIs, and other documents required for vendor operations, as well as to submit invoices. The vendor on-boarding process is supported by automatic loading of vendor information to Voyager. From an invoice processing perspective, VendorCafe will allow the vendor to submit invoices to the client for payment, view invoice approval status, and gain insight to payment information.

Procure to Pay Best Practice

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

Procure to Pay: Full Service

Adoption of the Yardi P2P Full Service solution (which is now AI, OCR technology based) will eliminate manual invoice creation and data entry allowing your teams to focus on more high valued tasks. Let's explore What is Full Service, How It Works, Implementation Steps, and Transparency & Reporting.

Yardi Payment Processing for Commercial

Join this class to learn about Yardi's online payments solutions for commercial real estate, utilising Yardi Payment Processing. Learn about the online payment processing transaction flow with end-to-end automation and bank reconciliation

Elevate Facility Manager: Work Orders & Inspections

Join this class to learn about Facility Manager tools for creating and performing inspections and creating and overseeing service requests. Learn simple steps for creating recurring or on-demand inspections for your annual property and incident reporting needs. See how intuitive work order and inspection dashboards provide the right level of oversight to ensure work is completed fully and on time. Learn how Facility Manager integrates with the CommercialCafe tenant portal to manage tenant service requests and estimates for billable work to tenants.

Elevate Facility Manager: Preventative Maintenance and Equipment

Join this class to learn about the tools Facility Manager provides for managing preventative maintenance on equipment at your properties. See how our template-based approach streamlines the setup of equipment and preventative maintenance tasks to maintain a consistent PM program across your portfolio. You will also learn about options for creating high level or detailed equipment maintenance routines ready for consumption on the desktop or Facility Manager mobile app.

This class list is subject to change at any time.

CLASS DESCRIPTIONS - TECHNICAL

Correspondence for Advanced Users

This course will guide you through correspondence setup. We will discuss how to create your own custom correspondence report in Voyager, set up and customise your template, and provide guidelines on how to add and develop custom tokens and special tokens that can be used in your template.

Reporting Tools – which one, when, why?

This class is a Q&A overview 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. You'll also learn of the degree of customisation possible with Voyager analytics, SSRS, ad hoc tools, and the well-adopted, Excel-rendering, 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.

Data Connect for Power BI: Introduction

New for 2023: Yardi Data Connect launches this autumn as our next generation customised BI offering. YDC is designed to leverage the Microsoft Power BI technology. Learn about using YDC's secure API to stream data from one or more Voyager databases into your Azure environment, and how it combines with other external data sources for comprehensive reporting. For clients using Power BI today or hoping to use Power BI in the future, come join us to learn more.

Yardi Spreadsheet Reporting (YSR) basic technical session

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

Custom Financial Analytics

This class is an introduction to Yardi's custom analytics and provides information on creating financial analytic-type custom financials. Learn how to create account tree and property comparison templates using either standard or custom account trees. Topics include comparing financial data from prior periods to the current period and comparing similar data across multiple properties.

Scripted Reports

New for 2023: This intermediate course will expand your SQL knowledge and how to perform data-mining with Yardi's SQL scripting functions. Creating SQL scripted reports is the easiest way to achieve quick, presentable reports and results using Voyager's scripting engine. The course is intended to present the specifics of this reporting tool, and exemplify the possibilities it offers and its limitations.

Using YSR for Custom Financial Analytics

A Yardi Spreadsheet Report, set up to retrieve its data from a previously-developed custom financial analytic, is the preferred way to impose boardroom-quality formatting onto customisable financial reports. This class, which presupposes some familiarity with custom financial analytics, will illustrate the setup procedure of the YSR report in both Voyager 7S and Excel to retrieve the data and conditionally format the report according to the design of the underlying Account Tree.

Basics of Database Schema

Do you want to learn more about the Yardi database structure but don't know where to begin? Attend this course, which introduces you to the Yardi database tables. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

Basics of Database Schema for Student

New for 2023: Do you want to learn more about SQL queries and the Yardi database structure but don't know where to begin? This class will introduce you to the relevant database tables specifically for our student accommodation (PBSA) solutions and educate you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

Advanced Database Schema

This advanced course examines the complex relationship between transaction and detail tables, and how to write detail-level financial reports.

This class list is subject to change at any time.

CLASS DESCRIPTIONS - INVESTMENT MANAGEMENT

Investment Management Spotlight

Join us for a fast-paced tour of the Investment Management Suite. See how these solutions can create a comprehensive and versatile system for managing investors and an investment portfolio. The class includes the latest features and product updates for Investment Manager, Debt Manager, Loan Manager, Performance Manager and Investment Accounting.

Intro to Investment Manager: Investor Relations & Portals

See how easily you can communicate key information to investors and provide transparency from investor to asset operations with an intuitive and easy to navigate Investor Portal.

Fund Structures and Financial Consolidations : Intro and Setup

This session covers how to set up fund structures in Voyager and how to process financial consolidations. We will cover the key components required for setup and demonstrate the steps and processes required to complete the consolidations.

Fund Structures and Financial Consolidations : Advanced

This session covers more complex topics and is suitable for clients already using financial consolidations and looking to automate more of the process. We will cover the more complex consolidation setups and multi-GAAP requirements, performance considerations, accounting for goodwill and setup costs as well as setting up scalable and repeatable multi-step processes with taskrunner.

Debt Manager - Debt as a Liability: Intro and Setup

Managing loan terms, amortisation schedules, payable processing for loan payments, loan covenants, reporting and complex calculations is a daunting task for borrowers of debt on investments. Learn how Debt Manager can help you manage and aggregate all of this on one platform with filters such as lender, maturity year, or other definable loan attributes. You can quickly analyse and navigate your debt portfolio with outstanding balances, LTV, DSCR, collateral, future cash payments and other loan KPIs at your fingertips. Additionally, see how Debt Manager can track covenants with reminders to ensure your loans remain in compliance.

Intercompany

Join this class for an introduction to intercompany functionality in Voyager 7S that tracks each relationship with a segment. The class will cover setting up Voyager 7S-style intercompany, creating intercompany transactions with this setup, and completing intercompany reporting. We recommend that you have a basic understanding of segments before taking this class.

Debt Manager - Debt as a Liability - Advanced

This is a more advanced session and will cover syndicated loans, multi tranche loans and cross collateralisation as well as highlighting new and coming features.

Performance Manager

Performance Manager allows you to build and drill into large datasets to monitor and report on portfolio composition and performance with drilldown to interactive lease and project level data. Learn how to do this and see how it provides a slick user interface.

Debt Manager - Debt as an Asset

Learn about Debt Manager's ability to support complex and dynamic loans and syndication on terms which can differ for each investor. See an overview of collateral and covenant monitoring, and bulk processing of loan receivables to make your loan management and processing scalable.

IM - Calculator Analytics Advanced

Learn how to calculate returns for your investors, fund, and underlying property investments. This class will cover methodologies such as GIPS and Modified Deitz time-weighted returns, GIPS, and MSCI returns. Additionally, we will discuss how to calculate IRRs and to use Fee Calculator for management fees and other applications including equalisation/true up between incoming and incumbent investors.

Investment Management - Batch Allocations

This course covers how to set up and use batch allocations in Voyager in order to track cash and non-cash movements within the portfolio.
We will cover the various components of setup and demonstrate examples of how to manage cash inflows and outflows, revaluations as well as the reporting options available within the system.

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CLASS DESCRIPTIONS - FLEX SPACE

Yardi Kube Overview - Introduction to Flex Space

Learn how Yardi Kube delivers property, accounting, and IT management in a single platform for flexible workspaces. Our intuitive products generate leads and offer a marketplace for prospects. Members can access self-service options, while operators gain comprehensive oversight of all aspects of flexible workspace operations.

Powerful Reporting for Flexible Workspace

In this session we will cover a range of reporting that is specific to flex space needs. Easily track performance of lead conversion and occupancy with reports and graphs. The session includes automated financial data reporting for landlords and a range of reports powered by Yardi Voyager. 2023 saw the delivery of multiple new reports based on client feedback, review the improvements first hand and understand the additional reports that are in progress.

Switching on Space Management - SMPRO

Take Kube IT Management to the next level. Switch on the additional available features and see how easy it is to turn your IT system into managing your flex space accounts, for now, and into the future, as your business needs increase.

Kube IT Implementations & Member Management

In this class you will discover how our member management solution delivers company domain authentication and Wi-Fi automation to help save time with heightened security as well as integration with IT and SM. You will also discover how the Kube member app helps you manage your member communities and member permissions.

Manage Your Flex Space

Yardi Kube provides the essential tools to manage your property, spaces & member portfolio, this class will focus on how to handle the back office requirements, your daily inspections, dealing with failing equipment, preventative maintenance and instructing a vendor when necessary demonstrating the agile nature of these tasks via our easy to use app.

Branding for Flex Space

Yardi Systems understands the value of branding in the flex space community. In this class, learn how to reflect your branding across various means of communication from Yardi Kube to your member community providing consistent messaging for a seamless member experience.

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CLASS DESCRIPTIONS - DOCU MANAGEMENT, ELEARNING, ENERGY, BLUEPOINT, COROM

Pulse Energy Management and GRESB reporting

Learn how Yardi helps you gain visibility into energy demand and consumption across your entire real estate portfolio. This course will also include GRESB reporting functionality.

Introduction to Yardi Bluepoint

Learn how Yardi Bluepoint visitor management enables you to oversee the movement of people by providing staff, tenants and occupiers, reception teams and building management teams real-time access to visitor data. Yardi Bluepoint allows you to manage the entire visitor journey and enables strategic decision-making on staffing, space utilisation and compliance.

Introduction to Yardi Corom

The purpose of this class is to demonstrate how to use Yardi Corom to manage corporate (accounts payable) leases. Yardi Corom centralises lease management, lessee accounting, and transaction management for occupiers and commercial tenants. The lease management feature centralises lessee lease and sub-lease data for real estate and equipment and owner-occupied real estate portfolio information. It also provides powerful tools for streamlining compliance with FASB ASC-842, GASB 87 and IFRS 16. Transaction Management provides tools for occupiers to optimise real estate transactions with data-driven decisions.

Energy Management Roundtable

Discuss your Energy Management needs. Open to both Residential & Commercial Yardi Clients.

Introduction to Aspire eLearning

Today's workforce is changing the training landscape in positive ways, prompting companies to incorporate new technologies and strategies into training. Discover how half a million professionals leverage Aspire to stay on top of Yardi software changes, laws, regulations and safety best practices, and to develop essential personal and professional skills with a variety of training resources. Learn how to connect your Aspire university with HR and other systems to fully automate your training for all onboarding and continuing education. Deepen knowledge, save time, reduce errors and improve training efficiency with Aspire.

Document Management for SharePoint: Introduction

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

First Line Helpdesk Services

Have you ever wondered if an outsourced model for Voyager first line support is the right decision your organisation? Discover Yardi Help Desk and learn how this solution can improve your organisation's efficiency and effectiveness as well as mitigate risk. We'll walk through how the Help Desk solution is implemented, tailored and integrated into your organisation to provide a seamless support structure for your users. Also hear what other clients have to say about using this service.

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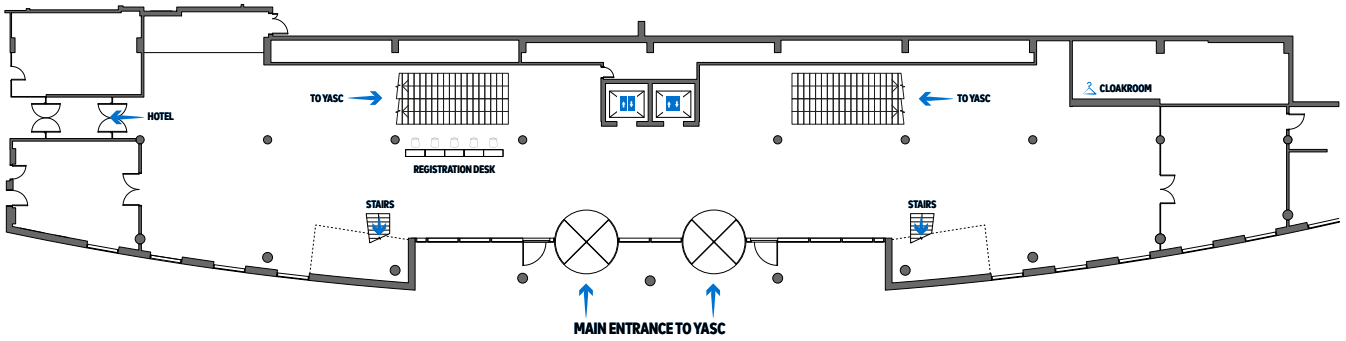
MAPS

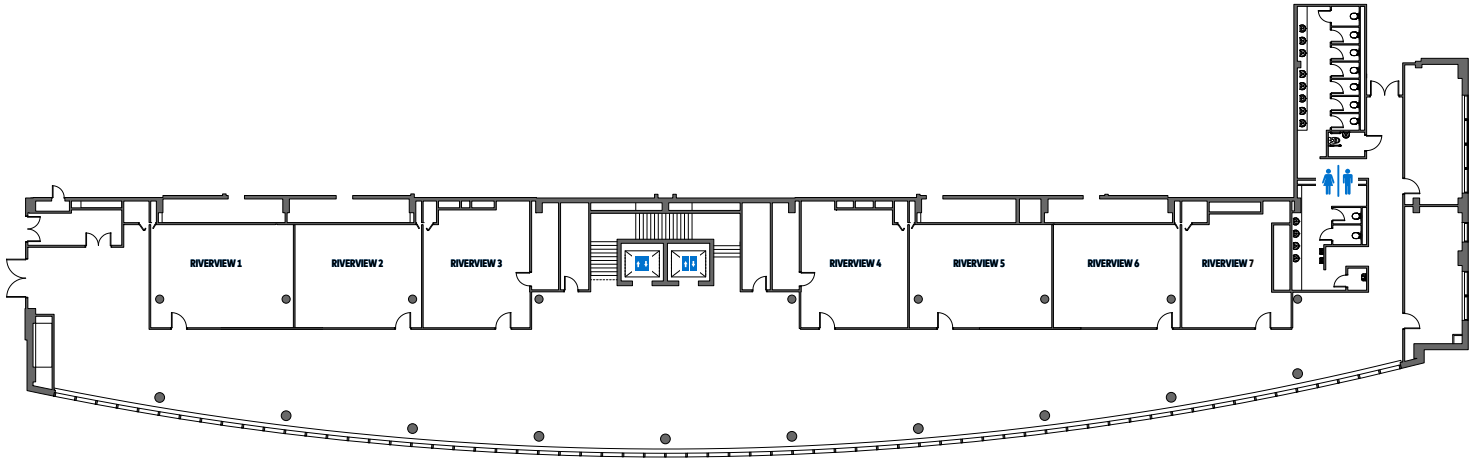
Ground Floor

Entrance
Registration &
Cloakroom



2nd Floor

Riverview
Meeting
Rooms



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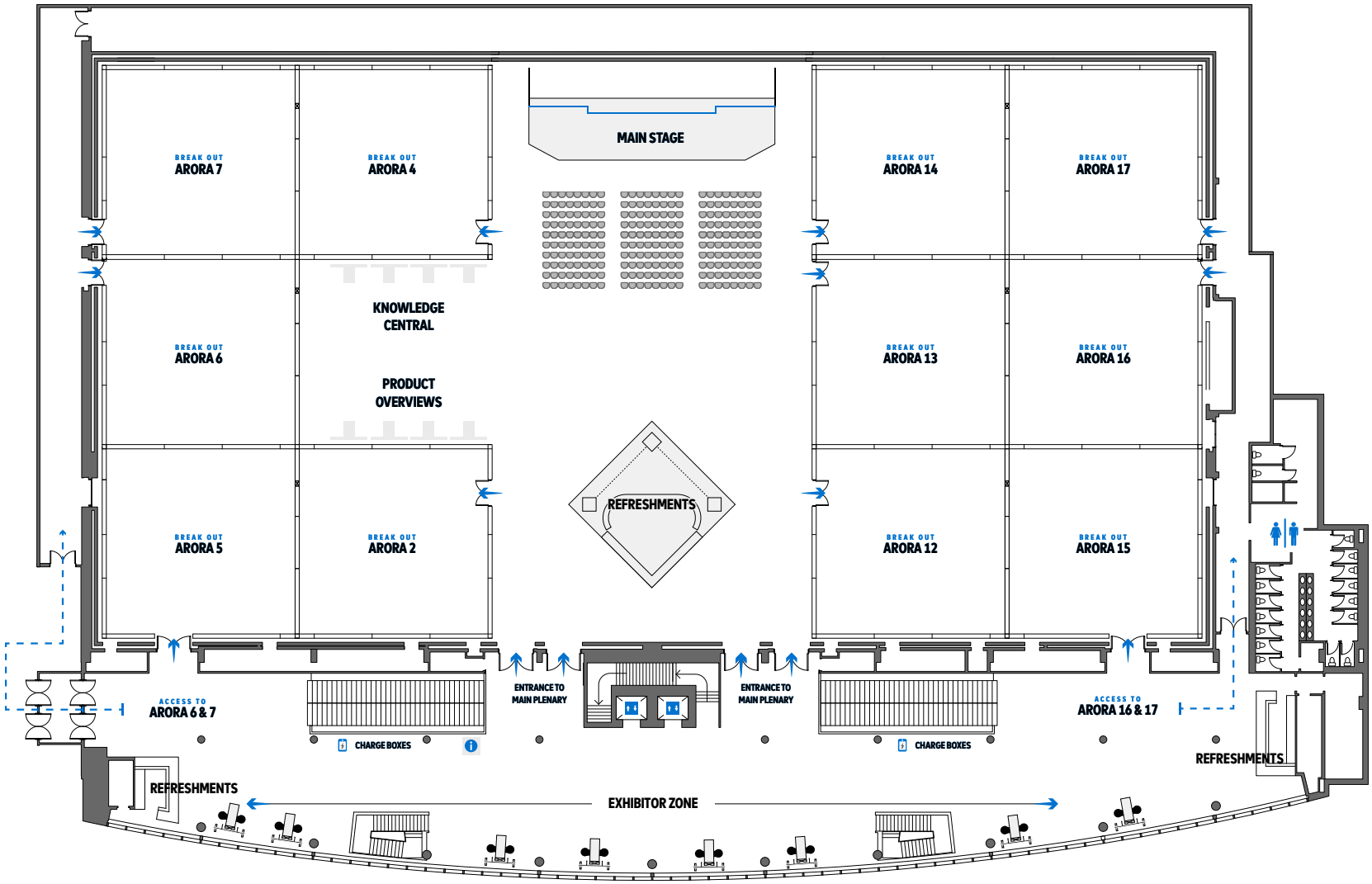
MAPS

Main Ballroom



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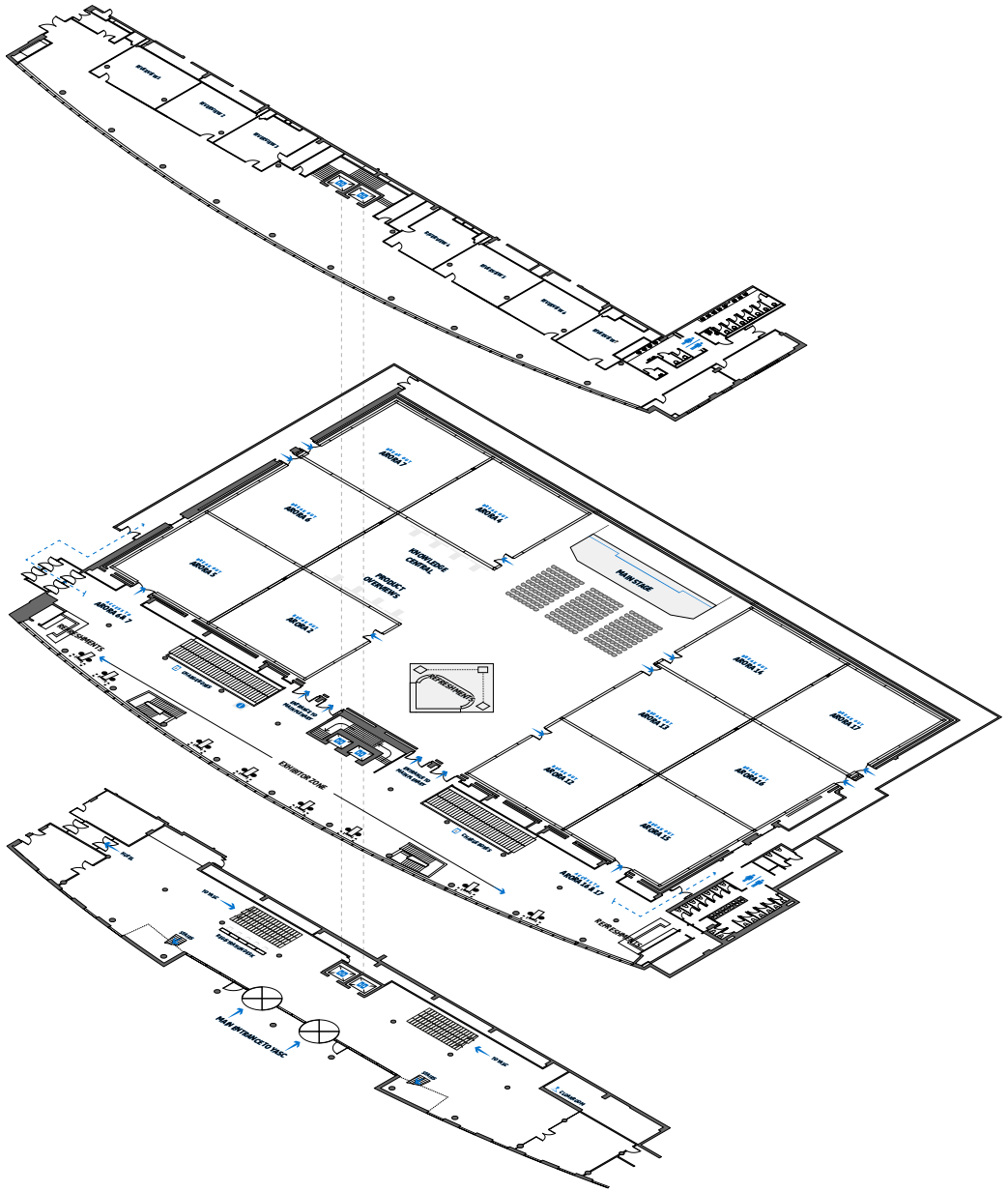
MAPS



2nd Floor -
Riverview
Meeting Rooms

1st Floor -
Main Ballroom

Ground Floor -
Registration &
Cloakroom

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