Class Descriptions

San Diego, CA

September 6-8

YASC

Icon Legend

★ **Basic**

These classes are designed to give any level of Yardi user a better fundamental understanding of Yardi property management and ancillary operations software.

★★ **Intermediate**

This level is recommended for attendees with in-depth knowledge of the subject matter. These classes explore advanced concepts and assume a solid understanding of the foundational principles.

★★★ **Advanced**

Advanced classes are designed for seasoned professionals and Yardi software experts, offering in-depth explorations of complex topics and cutting-edge techniques to further enhance knowledge and skills.

❖ **For Executives**

With sessions focused on programs and strategies to assist in high level decision-making, this class level is tailored for executive-level professionals.

⌘ **Panel Discussion**

Informative panel discussions feature product experts engaging in a thought-provoking conversation, sharing their perspectives and presenting diverse viewpoints on key topics.

● **Peer Roundtable**

Our peer roundtable classes feature professionals from various backgrounds coming together to share their valuable experiences and engage in meaningful discussions that foster learning, connectivity and growth.

■ **Product Overview**

Join our Product Overview classes to gain a high-level understanding of Yardi's innovative software, as experts guide you through key features, functionalities and benefits.

Follow the conversation!
#YASC2023

CORE FUNCTIONALITY

Accounting

★★

Automating Voyager Management Fees

Join us for an overview of the Management Fee functionality and discover how to create commission payments directly in Voyager. We will explore how to set up management fee pools, create commission payments and post these payments within Voyager.

★★

Correcting Resident & Tenant Ledgers

It's inevitable in property management: Errors are made on a resident/tenant ledger and you can't tie out reports. Now what do you do? How do you correct it? This class will dispel some of this mystery by showing how to identify and correct errors in resident/tenant balances and spot inconsistencies between ledger and aged receivable reports. (This class does not cover content relevant to HAP or other specialized ledgers.)

★

Introduction to Voyager Intercompany & Cross Entity Trans

This class introduces the two primary options for allocating expenses to properties/ entities: intercompany and cross entity trans. Intercompany is typically used when transactions need to be eliminated between a company and its subsidiaries while cross entity trans is used for billbacks (cost allocation). We will review the basics of these options, when to use them and the financial reporting differences.

★★

Residential GPR Explained

This class 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 ensure accurate reporting of your financial position.

★★

Voyager Account Trees: Introduction

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

★★★

Voyager Account Trees: Advanced Topics

This class will enhance skills acquired in the introductory Account Trees class by showing how to set up more complicated account trees for more detailed financial statements. Learn how to alter the appearance and totaling of financial statements to accommodate an organization's unique reporting requirements.

★★

Voyager Automatic Bank Reconciliation

This class will show how you can save time and improve accuracy with the automated functionality available in Voyager 7S.

★

Voyager Bank Reconciliation

Learn how Voyager helps make the bank reconciliation process a snap! This class will cover bank account setup, bank reconciliation features, processes, reports and troubleshooting techniques.

★

Voyager Bank Reconciliation Troubleshooting

Learn the troubleshooting basics of the Bank Reconciliation feature in Voyager. We'll review the Bank Reconciliation Exception report and discuss the correct procedure for creating adjustments. We'll also discuss when to use the Checkbook Maintenance and Unpost Bank Reconciliation functions and examine the importance of the Merge Deposit function in the Bank Reconciliation process.

★

Voyager Financial Analytics

Voyager contains powerful reporting tools for viewing financial data in a variety of ways. This class will review summary and detailed reports; how to break down financials by GL segments, property attributes, account trees and GL books; and exporting reports to PDF and Excel with the click of a button. We'll show how to drill down from the report level to the individual transaction level without leaving the report. (2-hour session)

★★★

Voyager Financial Best Practices

Learn how Voyager promotes accounting best practices for efficiency and accuracy. This class will review the general ledger account setup, procedures, each data value's importance, automation optimization, month-end procedures, optional packages and more.

★

Voyager Financial Reporting Overview

Learn how to use Voyager to streamline financial reporting. This class will provide an overview of some of the most commonly used financial reports and their features.

★★★

Voyager 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.

★★

Voyager 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.

★★

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

Month-end can be a hectic time for accounting and tying out reports to ensure accurate financials can be time-consuming. In this class, you will learn prerequisite tasks, useful tips and troubleshooting techniques to complete month-end tasks efficiently.

★

Voyager 8: Next Generation Voyager Introduction

Voyager 8 is coming soon with significant updates to the Voyager 7S experience. This introduction to Voyager 8 is a summary overview of how this new user interface organizes its functions around AR, AP, GL, reporting and much more. For multifamily, you will see the all new property operations interface for resident ledger, renewals, work orders and a whole new set of resident services. 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 has arrived and is positioned to help you navigate the future of infinite possibilities.

★

Voyager Segmented Accounting

Want to increase the amount of detail in your financial reports without adding GL accounts to your chart of accounts? If so, GL segments may be the solution you are looking for! This class will show how using GL segments to record and store GL data in categories lets you add significant new details to financial reports.

★

Voyager 8 Upgrade Overview

This class will provide you with a comprehensive guide to upgrading from Yardi Voyager 7S to Voyager 8. We will discuss the individual steps needed to upgrade for multifamily and commercial, expected timelines for completion and what to expect during the process. Voyager 8 is coming soon and is positioned to help you navigate the future of infinite possibilities.

Reporting

★

Basics of Database Schema & SQL

Do you want to learn more about SQL queries and the Yardi database structure but don't know where to begin? This class will review basics of table relations in the Yardi environment and educate you on basics of SQL select statements. This information can be helpful when troubleshooting data-related issues or identifying how certain data sets relate to each other in your system.

★

Custom Financial Analytics: Introduction

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.

★★

Custom Financial Analytics: Intermediate

This class builds on the Custom Financial Analytics Introduction class. It focuses on creating templates that use arithmetic formulas, attributes and performance data calculations. This allows comparisons of GL accounts between properties or summarized by property attributes and leverages standard or custom account trees to create attribute comparison-type templates. The class also shows how setting user group security on your templates can help limit the templates available for reporting for specific user groups.

★★★

Custom Financial Analytics: Advanced Topics

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, take this class to learn how to pull feeder data to access the total from an account tree expansion. We'll also demonstrate how to use the Rolling Month and Period to Date functions for deeper flexibility in your customization toolbox, and many other advanced features. The class includes a discussion of the database structure used by the program to populate the custom analytics and view some advanced template designs. We will also present tips and tricks for validating designs and correcting errors.

★★

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 class provides an introduction to FillDocs, with an emphasis on leases, letters and statements.

★★

SQL Scripting

This intermediate-level class 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.

★★

Using YSR for Custom Financial Analytics

A Yardi Spreadsheet Report, set up to retrieve data from a custom financial analytic, is the preferred way to translate boardroom-quality formatting into customizable financial reports. This class, which assumes some familiarity with custom financial analytics, will illustrate the procedure for setting up 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.

■

Yardi Data Connect for Power BI: Introduction

Yardi Data Connect launches this fall as our next generation customized 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 Overview

Yardi Spreadsheet Reporting (YSR) enables advanced report designers to create Excel or Word report packets in Voyager. This class will offer an overview of the product's capabilities and is designed to help you understand how YSR can be used to create boardroom-quality reports.

★★

Yardi Spreadsheet Reporting Technical Session: Part 1

Yardi Spreadsheet Reporting (YSR) is a well-adopted Voyager report-rendering technology that lets designers create packets of individual documents authored in Microsoft Excel or Word. This class will offer a step-through of creating a YSR report and drawing data from both Yardi SQL scripts and the analytic engines of conforming verticals. It will also present an overview of the setup techniques for YSR, including establishing runtime filters and mapping them into the component individual reports, using the Excel add-in to help design reports. You'll also get a tips and tricks presentation and a review of some newer features in the latest Voyager 7S releases, along with documentation information and how to learn more about YSR.

★★

Yardi Spreadsheet Reporting Technical Session: Part 2

This class is a follow-up to Part 1, suitable for those tasked with designing custom reporting solutions using Yardi Spreadsheet Reporting (YSR). Newer features are introduced, such as a YSR admin menu set that centralizes many maintenance features useful to YSR report administrators, including uploading and downloading templates and scripts and managing menu URLs. We'll contrast the classic setup and interface with the newer, slimmed-down interface. We'll also explore the ability to lock or hide passed-in filter parameters from menu URLs and discuss a new activity monitoring report. If time permits, we'll look at how to easily echo filter values and conditionally hide columns, and review detailed formatting tips and YSR best practices.

Panel Discussions

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Client Panel Discussion: Yardi Elevate for Commercial

Get an inside look at the process of selecting, implementing and using Yardi Elevate as a single connected solution for portfolio management.

★

Client Panel Discussion: ESG & GRESB

Join this discussion with the Head of Americas from GRESB and Yardi clients experienced in GRESB ESG Reporting. ESG programs and reporting from both Residential and Commercial perspectives will be shared with the audience.

★

Client Panel Discussion: Investment Suite Client Case Studies & Best Practices

This session features investment management leaders across multiple asset classes and investment strategies discussing the latest challenges in private equity real estate. Hear how connecting front, middle and back office operations makes it easier to satisfy investors' demands for self service access to accurate, real-time data and reports.

★

Client Panel Discussion: Multifamily

Want to hear from your peers on a variety of topics in multifamily? Attend this session as a panel of experts share their experiences and discuss trends you can take back to your business.

Technical

★★★

SQL Scripting: Advanced Topics

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.

★★

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 dates for those tasks.

★★★

Voyager Menu Security: Advanced Topics

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

★★

Voyager System Administration Toolbox

Join this class to become familiar with the features in the utilities toolbox. Learn what each tool does and doesn't do and when to use it. The class also includes a demonstration of the toolbox's reporting capabilities.

★

Voyager System Attributes & Dynamic Property Lists

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

★

Yardi 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.

★★

Yardi Document Management for SharePoint: Advanced Topics

Deepen your understanding of Document Management for SharePoint, which extends your Office 365 investment and creates a paperless office. Learn the benefits of automated folder setup, tagging and two-way data synchronization between Voyager and SharePoint. See how you can leverage change management features and audit trails to give non-Voyager and external users fast, secure access to property-level documents.

★

YardiOne: Introduction

Ever wish you didn't have to enter your credentials each time you access a Yardi program? Or maybe you want an easy way to access all your Yardi applications in one place? Perhaps you'd like a single place to maintain all your Yardi user records? If you answered yes to any of these, 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 if you are interested in learning more about YardiOne, join us!

★

YardiOne: New Features

Come learn about the latest features available in YardiOne. This class will cover changes made to YardiOne over the last year.

ANCILLARY MARKETS & SERVICES

Aspire

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Aspire: Overview

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.

★

Build Fast Interactive Courses (Workshop)

Discover the art of building fast interactive courses that empower property management teams with dynamic and impactful learning opportunities. This class covers converting documents into courses, integrating images, videos and audio, incorporating animations, design templates, assessments and content. Elevate your instructional design skills and deliver engaging training experiences with Aspire!

★★

Connect & Cultivate: How to Maximize Mentorship Programs

Cultivate a culture of continuous learning and professional advancement within your organization through mentorship. In this class, you will learn how to effectively manage and maximize your mentorship program with the help of Yardi Aspire. This class will cover key features, such as the centralized Mentor Hub, skill-based relationship matching, mentor-to-supervisor communication, participation tracking and creating custom mentorship program training plans. Learn how to create a mentorship experience for employees, mentors and the organization that leads to increased retention, improved employee satisfaction and a more skilled workforce.

★★★

Every Second Counts: Adaptive Training for Better ROI

Embark on an exploration of diverse adaptive training techniques that are proven game-changers in employee development. This class focuses on crafting and implementing adaptive learning plans, courses and refresher training that maximize learning impact by adjusting to the specific needs and preferences of your employees. You will explore different adaptive training techniques that can significantly improve the effectiveness of your training program. By the end of the class, you will understand how adaptive training can benefit the employee, mentor, organization and even customers, resulting in a better return on investment for your company.

★★

From Learning to Doing: Encourage Career Growth

In today's challenging hiring climate, HR and recruiting professionals are teaming up with training and leveraging Yardi Aspire to build a robust pipeline of qualified talent. Topics in this class include effective marketing, career pathing, assessing role-readiness and aligning development paths. Drive career growth and nurture a talented workforce for organizational success!

★

Lasting Impression: How to Host Memorable Training Events

Discover the power of Aspire's interactive event management dashboard and learn to create engaging, branded events with ease. From registration management to seamless integration with meeting providers, you'll master the art of delivering memorable training experiences. Unleash your creativity with design templates and targeted marketing strategies to reach your ideal audience. Dive into the world of data analytics and gain insights that will help you continuously improve your training events. Elevate your property management training and make a lasting impression with Aspire.

★★

Reduce Turnover & Boost Morale with Purposeful Nurturing

Deepen workforce connections with purposeful nurturing strategies that reduce employee turnover and elevate workplace morale. This class explores the significant impact supervisors have on employee retention and job satisfaction through training participation, advocacy and communication. The class will also cover best practices in encouraging learning participation, offering training recommendations, assigning feedback, recording private admin notes and overseeing learner performance with reports. By the end of the class, you will have the knowledge and tools to create a positive and productive work environment that fosters employee engagement and loyalty.

★

Trainer Roundtable

Keeping staff up to data on the latest Yardi software and best practices is crucial for ensuring smooth and efficient operations. In this class, you'll learn about options and strategies that align with your staff training objectives. We'll also share insider tips for maximizing the value of your training program.

★★

Training That Sticks: Drive Engagement with Experiential Learning

Master the art of crafting and delivering transformative training programs. In this class, participants will learn how to design and deliver effective training programs that engage learners and promote long-term retention of information. Through experiential learning techniques, including simulations, case studies and group exercises, participants will explore how to create an immersive and engaging learning environment that drives behavior change. Key topics covered will include recommendations, personalized support, immersive training and learner motivation. By the end of the class, participants will have the tools and techniques necessary to create training programs that stick with learners long after the training is over.

★★

Work With What You Have: Optimizing Staff & Resources

Unleash the potential of the Aspire learning management system to deliver staff development within limited budgets and staffing resources. Support talent development across your organization with role-based learning plans and Yardi-taught software training webinars that complement your current training program with ready-to-use resources. Learn to expedite webinar setup and automate attendance tracking with seamless integrations such as Microsoft Teams Events and Zoom Meetings. Streamline training administration with data import and automated course assignments. Join us to revolutionize your property management company's training approach and achieve outstanding results!

Energy

■

Bill Pay Express for Utilities

Tired of utility vendors misapplying payments, charging late fees and sending disconnect notices? Join this class to learn about Yardi's solution to ensure proper allocation of payments and significantly reduce the likelihood of late fees and disconnects. The time is right to take control of your utility payments.

★★

ESG Sustainability Reporting & Benchmarking

Yardi can help you attain 100% whole building data coverage for ESG energy, water and waste reporting. Learn how Yardi can help you comply and certify your buildings to meet ENERGY STAR® benchmarking requirements. See our new GRESB reporting product offering.

■

Single Family Homes HOA

Learn how to reduce the time and effort needed to manage homeowners associations for single family homes. This class shows tips for managing governence documents, automating annual dues/violation payments and improving cost recovery.

★★

Utility Billing Alerts & Notifications

Yardi Pulse is a powerful tool for understanding your utilities. In addition to monitoring utility spend and consumption, Pulse can detect and notify you of water leaks in a unit. This class will provide an overview of how Pulse can help resolve leaks immediately to reduce utility spend and resident dissatisfaction.

■

Yardi Energy Suite for Multifamily

Learn how the Yardi Energy Suite can streamline utility billing, utility invoice processing and ESG reporting. The Yardi Energy Suite is an automated utility management system with no interfaces to third-party systems. See how the Yardi Energy Suite works with meter or submetered systems to provide a cohesive tool for managing utility billing more efficiently.

■

Yardi Pulse for Commercial

Learn how Yardi can help you gain unparalleled visibility into energy demand, consumption and GHG emissions across your portfolio. Explore tools that reduce energy usage such as Utility Expense Management, Bill Pay Express, ESG Data Aggregation and Reporting, and Energy Efficiency. The Pulse Suite can save you money and time while increasing the value of your portfolio.

Maintenance

★★

Facility Manager: Accounting Dashboard

This class introduces the all-new accounting dashboard in Facility Manager. We will walk through the process of creating and posting charge and payable batches from work orders after clearing validations such as missing GL accounts and charge codes.

■

Facility Manager for Commercial: Introduction

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.

★★

Facility Manager: Mobile App

This class will demonstrate the Facility Manager role-based app for technicians, engineers, supervisors and property managers. See how users can create and manage service requests, inspections and preventative maintenance tasks, and review equipment, equipment work history and warranties. Supervisors can assign work to team members and oversee the workload from a team perspective while users can review their daily, weekly and monthly labor time and material usage. The app supports push notifications and works offline.

★★

Facility Manager: Preventative Maintenance & 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.

★★

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.

★

Fixed Asset Manager: Overview

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.

This class list is subject to change at any time.

★★

Integration of Facility Manager, CommercialCafe & VendorCafe

This class will demonstrate the end-to-end solution for work orders from CommercialCafe to Facility Manager to VendorCafe. Tenants can utilize 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.

★★

Maintenance IQ for Multifamily: Inspections

Join us as we show how to complete unit-level and property inspections, including details about damaged items.

★★

Maintenance IQ for Multifamily: Mobile App

Join us as we show you how to complete inspections and work orders using the Maintenance IQ Mobile App.

★★

Maintenance IQ for Multifamily: Unit Turn

Join us as we show you how to improve productivity and reduce unit turn times, track turn costs and project milestones on the Unit Turn Dashboard.

★★

Maintenance IQ for Multifamily: Work Orders

Join us as we show how to gain real-time visibility into maintenance operations, manage scheduled maintenance tasks and respond to new requests with a dashboard that displays on-demand work orders.

★★★

Maintenance IQ New Features

Join us as we discuss new features and roadmap items for Maintenance IQ.

Payment Processing

★★★

Advanced Payment Processing

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, troubleshooting and using Admin Utilities.

■

Payment Processing: Introduction

Looking to automate your rent-collection process? Join us for this review of Yardi CHECKscan, Yardi Credit Card and Yardi Portal Online Payments. This class is intended for clients considering CHECKscan.

★★

Resident Online Payment Experience

Attend this class to see the resident payment experience in RentCafe! Join us to see how residents initially set up their bank accounts and cards for processing one-time and recurring payments. Other exciting topics will include resident payments through the mobile CHECKscan application and generating a WIPS account number directly in RentCafe.

★

Voyager 8: Accounts Receivable

Attend this class as we dive into accounts receivable in Voyager 8. We will demonstrate new features and how to manage all your accounts receivable activities in one location. Learn how easy it is to navigate to reports, tenant's ledger and alerts on the dashboard.

★

Voyager 8: Payment Processing New Features Update & Roadmap

Come take a tour of the newest features available in Payment Processing! See an overview of the latest interface on Voyager 8 and some of its best features. You will see useful enhancements that increase security in the banking portal. We will also discuss the new ACH account validation for your tenants.

Procure to Pay

★★★

Bill Pay: Advanced Features & Best Practices

This class focuses on maximizing the effectiveness and use of Bill Pay. We'll cover best practices to help you align your organization's use of the solution with industry trends.

★

Bill Pay: Basics

Are you a new user of Bill Pay? Do you need a refresher on Bill Pay basics? Join us for a training-focused session of Bill Pay basics in the Procure to Pay role and how it can help manage your accounts payable payment activity in one convenient location. Learn how to navigate payment records, payable invoices, invoice registers, vendor ledgers and alerts. By the end of this class, you will have an understanding of how Bill Pay can help to achieve operational efficiencies and centralize approvals, processing and reporting.

★★★

Bill Pay: Credit Cards & Debit Cards

Come and learn about the substantial opportunities available in Bill Pay with payments on the Yardi Virtual Credit Card and rapid refunds for residents with a debit card account. These modern, fast and frictionless payment methods provide powerful, cost-free options for disbursing funds to vendors and residents.

■

Bill Pay: Overview

Learn how Bill Pay can automate payments to vendors, owners, tenants and residents via virtual credit card (Yardi Card), ACH and physical check.

★★★

Bill Pay: Payment Security

This class provides a strong foundation for improving payment security with Bill Pay and VendorCafe. Each solution helps mitigate risk you might face in your AP processes. Attend this class to get a jump-start on securing those processes.

★★★

Procure to Pay: Best Practices

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: 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!

■

Procure to Pay: Introduction to P2P Services (Service Contracts)

Learn how Procure to Pay Services can help streamline management of service contracts, documents and all associated transactions.

★

Procure to Pay: Marketplace Overview

Standardize and simplify your procurement processes using Yardi Marketplace with your supplier relationships and/or Yardi-managed suppliers. This class will show how to shop and create purchase orders from Marketplace, then process an invoice received via Marketplace electronic invoicing. Yardi 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're interested in improving the efficiency of your procurement processes, this class is for you!

★

Procure to Pay: New Features Update

Learn about the latest offerings in the Procure to Pay Suite. This class reviews new functionality within PayScan, Marketplace, VendorCafe and Bill Pay. This class is intended for existing Procure to Pay users.

★

Procure to Pay: PayScan Basics

PayScan delivers consistent AP policies, eliminates the physical movement of paper and facilitates electronic invoicing. Take this class to view the full transaction lifecycle, from converting your paper invoices into electronic invoices to approval and posting. Learn how to track, review and process your invoices using PayScan dashboards and the PayScan mobile app.

★★

Procure to Pay: Performance Metrics & Operations Analysis

With over 10 years of product history and more than 3,500 clients, PayScan has accumulated a wealth of industry information into its AP database. Join this class to see how we mine this data, analyze summary statistics and share the results with PayScan users. For example, 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's 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 you can improve your company's performance.

★★

VendorShield: Best Practices

Join us to learn VendorShield configuration best practices that maximize the compliance experience for you and your vendors. This class will focus on vendor classification and adoption, insurance setup and maximizing the efficiency of internal workflows.

■

VendorShield: Introduction

Learn how VendorShield can help you reduce operational and reputational risk. VendorShield is a comprehensive, full service vendor compliance and monitoring platform built into the VendorCafe and vendor approval workflows. The system features configurable criteria, reporting and real-time, accurate compliance statuses to help you know your vendors.

COMMERCIAL

■

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.

★

CommercialCafe Tenant Portal: Advanced Features

Learn about advanced features and processes in the CommercialCafe tenant portal including automating tenant invitations, tracking insurance and processing lease renewals. This class will also highlight new features and what's coming.

■

CommercialEdge Commissions: Simplifying Internal Commissions & Accounting

This class explores the features and benefits of CommercialEdge Commissions, which centralizes and streamlines operational processes for commercial real estate brokerages and commercial leasing teams. Using CommercialEdge Commissions, brokerages and leasing teams can manage their agents, split plans and transactional deal data, and automate invoice creation and agent commission distribution calculations. The platform can be integrated with Deal Manager and Voyager for increased efficiency.

★★

CommercialEdge Deal Manager & Legal: Powerful Lead to Lease Management

This class will explore the features and benefits of Deal Manager, which 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 workflows for internal and external brokers while giving asset managers enhanced deal pipeline visibility.

■

CommercialEdge Marketing: Supercharge Your Marketing Capabilities

This class will explore how CommercialEdge Marketing automates listing of available inventory on corporate sites and syndicates to leading public-facing commercial listing sites. We will also showcase some new CommercialEdge Marketing tools for email templates, email automation and brochure templates. See how CommercialEdge Marketing provides one centralized location that helps asset management teams work with their marketing and leasing colleagues to generate and store marketing collateral that can be tied to properties and spaces synced from their Yardi database. The class will highlight how marketing with CommercialEdge produces efficiency and higher lead volume for owners, landlords and their leasing teams.

★★

Commercial Automated Cash Application: Introduction

Learn the benefits of automating commercial receipt payments, batch creation and application of payments to outstanding charges. This class will cover the automated lockbox imports and cash matching function in Voyager 7S, which is available whether you have existing lockbox relationships or prefer Yardi as a full-service lockbox option. Learn how to make daily receipt payments more quickly and easily. This functionality is designed for commercial property-focused portfolios but can be used for various other real estate portfolios.

★★

Commercial Best Practices: Introduction

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

★★★

Commercial Best Practices: Advanced Topics

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

★

Commercial 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.

★

Commercial Recoveries: Introduction

Join this class 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.

★★★

Commercial Recoveries: Advanced Features

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

■

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

In this session, we will explore the critical interplay between budgeting, leasing and construction projects and their impact on optimizing asset performance within a commercial real estate portfolio. We will focus on equipping participants with the necessary tools to achieve transparency, accuracy and actionable insights throughout 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 maximize asset performance.

Corom: Occupier Solutions

The purpose of this class is to demonstrate how to use Yardi Corom to manage corporate (accounts payable) leases. Yardi Corom centralizes lease management, lessee accounting and transaction management for occupiers and commercial tenants. The lease management feature centralizes 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 optimize real estate transactions with data-driven decisions.

Deal Manager: Introduction

This session will explore the features and benefits of Deal Manager, which 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 workflows for internal and external brokers while enhancing deal pipeline visibility to asset managers.

Floorplan Manager in Commercial

Whether you have office, retail or industrial properties, our newest commercial product, Yardi Floorplan Manager, can bring significant value to your marketing, leasing, construction and property management workflows. Learn how to import, view and edit CAD files, create alternate floorplans for marketing purposes, approve and activate floorplans, and calculate rentable and usable areas according to the major standards (e.g. REBNY, BOMA, etc).

★ Spotlight on Commercial

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.

TenantShield: Introduction to Tenant COI Management

Looking to increase staff efficiency? Learn how TenantShield can automate the manual burden of tenant screening and insurance compliance while helping manage risk.

Voyager 8: Commercial Lease Admin & Tenant Management

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 analyzing and reporting on portfolio health, managing collection efforts, tracking insurance requirements and compliance, and much more.

Yardi Data Connect for Power BI: Introduction

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

Yardi Kube: Achieving Flexible Workspaces

This class will introduce you to our coworking solution, Yardi Kube. We'll discuss coworking spaces, terminology and market forces before providing a demonstration of Kube. Learn how Kube provides e-commerce, CRM, billing automation, building automation and IT management, reporting and more. We'll also cover the typical challenges encountered by coworking operators and how we solve for them.

Yardi Novo: Enhanced Tenant Experience

Looking to improve the experience of your tenants and their employees? Join this class to learn about Yardi Novo, which facilitates tenant communications and custom surveys, manages property event calendars, advertises promotions for local businesses, provides visitor management and enables access control - all within a convenient mobile app.

Construction

★★★

Construction Advanced Topics

This class will cover a variety of topics for the advanced Job Cost user including CM fees, income contracts and retention processing.

★

Construction Basics

This class will provide a high-level tour of Job Cost functionality. Expect an emphasis on creative uses of Job Cost, including general feature overviews and best practices.

★★

Construction Draws & Receivables

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

★

Construction Manager: Capital Planning

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 is designed to capture up to 10 years of budgeting requests, offers seamless job creation and integrates with Forecast Manager and Valuation Manager.

■

Construction Manager for Commercial: Introduction

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.

★

Construction Manager: Forecasting

Find out how easy forecasting can be with the new look and functionality in Elevate Construction Manager. With new options and a completely new UI, this is one you don't want to miss.

★

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.

★

Construction Manager: RFPs & 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.

★

Construction Roundtable

Elevate Construction Manager helps property developers, asset managers and project managers keep track of capital planning and new construction projects. Asset and construction managers can mitigate risk, improve cost control, oversee budgets and increase profitability via real-time information across a portfolio. Project managers in the field can create, compare and award RFPs, enter risk assessment and execute project workflow approvals. Join us for a discussion of recent enhancements, upcoming development and our roadmap.

★★

Integration of Construction Manager & Forecast Manager

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 reflect those newly created jobs in your property budgets.

Forecasting

★★

Advanced Budgeting & Forecasting: Reforecasting & Advanced Features

This class will review some of the features in Advanced Budgeting & Forecasting (ABF) that contribute to reforecasts. Topics include best-practice recommendations to quickly create a reforecast in ABF, function groups for facilitating repeatability and reporting. Let ABF help make your reforecasting process smooth and efficient!

■

Forecast Manager for Commercial: Introduction

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

★★

Forecast Manager for Commercial: Opex & 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 synchronized 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.

★★

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 organization's needs.

★★

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.

★★

Integration of Construction Manager & Forecast Manager

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 those newly created jobs reflect in your property budgets.

★★

Integration of Deal Manager & Forecast Manager

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.

■ **Valuation Manager for Commercial: Introduction**

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.

INVESTMENT MANAGEMENT

■ **Investment Manager: Introduction to Investor Relations & Portal**

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.

■ **Debt Manager: Managing your Loan Portfolio**

Managing lending, debt borrowing, loan terms, amortization schedules, loan covenants, reporting and complex calculations is a daunting task. Learn how Debt Manager can help you manage and aggregate all these operations on one platform. See how you can easily access all your loans on a single dashboard, with drilldown into complete and accurate in-depth information, including forward-looking payment schedules.

★ **Debt Manager: Setting up Loans as a Borrower**

Managing loan terms, amortization 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 analyze 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.

★ **Investment Accounting: Financial Consolidations & Reporting**

This class covers producing consolidated financial statements above the property level. You will learn how to set up entities, build ownership structures and create consolidation entries with eliminations. The class also includes minority interest and equity pickup rules as well as using segments for intercompany eliminations within the rollup hierarchy.

★★ **Investment Accounting: IM Templates & Analytics**

This class will go into depth on leveraging Investment Management analytics to view capital transactions in a variety of formats and creating Investment Management templates for multiple purposes. It will also highlight out-ofthe-box analytics that utilize IM templates to calculate IRRs, unfunded equity, market value and other metrics.

★★ **Investment Accounting: Introduction to Fund & Back Office Accounting**

Automate the complex accounting transactions of fund management to dramatically reduce the analysis required by traditional accounting. This class will show how Investment Accounting allows you to manage wholly owned assets, joint ventures and other investment types for both small and large portfolio investors. We will cover all major processes required to configure and create capital transactions including setting up complex investment structures and managing commitments. We'll focus on functionality for sub ledger transaction types, GL cash tran rules, capital calls, distributions, income/MV/NAV allocations and reporting.

★★★ **Investment Accounting: Preferred Returns & Waterfalls**

This advanced class will go into depth on setting up and calculating complex preferred return deals and waterfall promotes. Join us to see how you can get away from maintaining these complex formulas in spreadsheets.

★★★
Investment Accounting: Share Tracking & Open End Funds
Do you have open end funds or funds with unit/share tracking? This advanced class will explain how you can track complex funds with NAV, shares and ownership rebalancing. Learn how to strike your NAV and share price each month or quarter, and achieve the detailed investor reporting needed for an open ended fund vehicle.

★★
Investment Accounting: Tax Withholding, Management Fees & Partner Transfers
This class follows up the Introduction to Fund Accounting & Back Office Accounting session, diving into tax withholding on investment distributions, complex investor management fee calculations (including side letter agreements) and partner transfers.

■
Investment Accounting: Unleashing the Power of New Elevate Interface
Come see the latest updates to Investment Accounting, which has been migrated into the new "Elevate Style" interface with intuitive business processes for all your favorite investment accounting features, as well as some new features exclusive to this new UI.

★
Investment Manager: Fund Raising & Digital Subscriptions
Learn how to streamline your fund raising process with investor and prospect pipeline management, CRM and correspondence and online investor subscriptions. See how Investment Manager's online portal provides a secure digital data room for sharing documents with investors and key stakeholders. Investor subscriptions are easily managed in a single system, from initial interest to subscription and each investor's commitment, with an easily followed milestone tracking process.

★
Investment Manager: CRM, Capital Tracking, Investor Reporting & Portal
What's the most efficient way to communicate vital information to your external investors? Learn how to give high-net-worth and institutional investors easy access to documents and portfolio positions with a branded online portal. This class will show how Investment Manager automates and streamlines document delivery, displays portfolio positions with an easy-to-use dashboard and delivers insight into potential opportunities in the pipeline. We'll review how to manage investor relationships and the administration of access to the portal.

★★★
Performance: Attribution & Composite Returns
This class will show how Performance Manager can be leveraged for composite building for returns. We will cover aggregating and computing returns across different levels and attributes as well as benchmarking returns against NCREIF and other industry indices.

★★★
Performance: Calculator Analytics & Performance Tables
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, NCREIF and IPD returns. Additionally, we will discuss how to calculate IRRs and any custom equity multiple, cash on cash or other return metrics and KPIs.

★
Spotlight on Investment Management
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, Valuation Manager and Investment Accounting.

RESIDENTIAL

Multifamily

★

Asset IQ for Multifamily: Overview

Learn how to elevate your asset performance with Yardi Asset IQ, a performance management tool that draws from Voyager data to deliver real-time insight into your properties' operational and financial health. Asset IQ can help increase revenue and lower costs by integrating with budgeting and pricing while providing predictive analytics and benchmarking. This class will include both introductory and advanced features available in Asset IQ.

■

Elevate Your Multifamily Asset Performance

Optimize your operational and financial performance with the most powerful tools on the market. See how the Multifamily Elevate Suite (Asset IQ, Revenue IQ and Forecast IQ) can help you optimize revenue and occupancy, reduce expenses, improve operations and deliver full insight across your portfolio. This session provides a brief overview of all three products and how they work seamlessly together.

★

Forecast IQ for Multifamily: Overview

Learn how to streamline and improve your multifamily budgeting process with Forecast IQ. Leave your spreadsheets behind and make use of Forecast IQ's unit-level revenue and easily configurable expense forecasting, all with better process visibility and control. This class will include both introductory and advanced features available in Forecast IQ.

■

Home IQ: The Future of Smart Homes

Looking for a true single-stack smart home solution? Join us to explore RentCafe Home IQ. Increase revenue and customer satisfaction by offering the technology experiences that residents want, all without adding third-party integrations or apps. Streamline touring, key distribution, maintenance and vacant unit management with built-in automations. Offer residents and site staff simple and intuitive tools for managing their smart homes. This class features some of our most exciting innovations!

★★

Lease Renewals

This class will review the lease renewal process. We will discuss creating individual and bulk renewals through the basic proposal/approval process. We will also cover renewal letter, the MTM process, reporting and permissions.

★★

Move-Ins, Transfers & Roommate Promotion

Learn the move-in process in detail and how it affects occupancy and GL transactions. Workflows for transfers and the promote roommate process will also be reviewed. This class reviews the system options that reflect how an organization handles security deposits, including the global, property and unit type options, as well as the effects on physical occupancy (history tables). The class also covers tips for troubleshooting the move-in process and associated GL transactions.

★★

Move-Out & Deposit Accounting

This is a refresher class on the Voyager move-out and deposit accounting process. We will review tenant status workflow of notice, cancel notice, move-out, cancel move-out and adjust move-out dates. The training will include a quick recap on unit type default and custom move-out charge setups followed by the deposit accounting and posting process. To conclude, we will review the posting impacts on accounting and the resident ledger.

★★

Residential Admin & Automation

This class will review utilizing standard tools that help reduce manual work for your help desk and site teams. Residential Write-Offs utilizes system defined charge code mappings to simplify write-offs. The Residential Toolbox allows you to undo items such as deposit accounting and promote roommate without reaching out to Yardi. Other tools discussed will include automation through task, optional parameters and rent responsibility.

★★

Residential Analytics

This class covers all residential analytic reports in detail. It will show important reports for tracking resident activity and financial details such as rent roll and security deposit activity reports. We will also cover conversion ratios, unit availability, resident activity and traffic detail. We will also discuss the use of KPIs and residential reporting.

★★★

Residential Best Practices

We will review tenant status workflow of notice, cancel notice, move-out, cancel move-out and adjust move-out dates. Training will include a quick recap on unit type default and custom move-out charge setups followed by the deposit accounting and posting process. To conclude, we will review the posting impacts on accounting and the resident ledger.

★★

Revenue IQ: Advanced Features

This in-depth class is designed to help you develop a comprehensive understanding of some of the advanced features of our revenue management software. We will cover a wide range of topics, including predictive analytics, decision-making tools and advanced reporting. With this class, you'll gain the skills and knowledge needed to leverage these features to gain insight, optimize pricing and achieve your goals. This class is designed with current Revenue IQ clients in mind.

■

Revenue IQ: Introduction

Let us show how you can increase rental income and improve occupancy with Yardi's revenue management system. Clients using Revenue IQ see consistent gains in net rental income while maintaining stable occupancy. This session will spotlight a solution that optimizes revenue with better results, enhanced service and complete visibility. Clients interested in an initial introduction to Yardi's revenue management offering will benefit from this session.

★

Revenue IQ: Overview

Learn about Yardi's established revenue management solution for the multifamily industry. Learn how to navigate and use the core features of Revenue IQ, control the settings directly, measure yourself against your peers with enhanced dashboards and other dynamic features. Both current Revenue IQ clients and others interested in growing their revenue will benefit from this session.

★

Spotlight on Multifamily

Discover the Multifamily 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.

★★

Y2Y Conversion Tool

Simplify residential property takeovers from another Yardi database using the Yardi to Yardi (Y2Y) tool. This tool puts you in the driver's 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.

■

Yardi Data Connect for Power BI: Introduction

Yardi Data Connect launches this fall as our next generation customized BI offering. YDC is designed to leverage the Microsoft Power BI technology. Learn about the product'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 it in the future, come join us to learn more.

★

Yardi Matrix: Market Research for Asset Management

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

Marketing, Leasing, CRM

★★

Chat IQ: Reporting

This class will explore the reports available to monitor Chat IQ's bot productivity. We will look at reports in Chat IQ Admin for your marketing staff and upper management, and reports your property staff can review.

★

Concierge IQ

Join us to learn about Concierge IQ, the next evolution of our tablet-optimized resident services module. Front desk employees utilize Concierge IQ to manage their daily activities such as amenity reservations, guest and visitor tracking, package tracking, shift notes, away notices, services and more!

■

CRM IQ: Advancements in Communication

Learn how to serve prospects and residents on the go or at your desk using real-time data and a simple user interface. RentCafe CRM IQ integrates with RentCafe Chat IQ, an AI-powered bot that lowers the workload of onsite teams and enhances the customer experience. Join us to experience the future in communication with the power of RentCafe!

★

CRM IQ: Centralized Leasing & Operations

CRM IQ offers a streamlined leasing workflow and enhances workflow efficiencies. In this class, learn how you can use this great new offering to manage your centralized leasing office or multiple leasing workflows.

★

CRM IQ: Introduction & Migration

CRM IQ is Yardi's newest evolution in customer relationship management solutions, providing centralized 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.

★

Marketing IQ: Data that Drives Strategy

Marketing IQ makes it simple to determine the strongest performing marketing mix for your properties, identify areas for improvement and adjust your marketing strategy based on your portfolio's needs. Learn how to use Marketing IQ to make data-driven marketing decisions without compromising performance.

★★

Marketing IQ: Focus on Financial Results

"Show me the money" isn't just a catchphrase. Join this session to see how powerful financial insights from Marketing IQ can support your team's budget allocations and overall marketing strategy.

■

Marketing IQ: Insights at Your Fingertips

Save time and reduce headaches! RentCafe Marketing IQ offers an easy-to-use intuitive dashboard that delivers insight into marketing strategy. Market your communities with confidence knowing you have visibility into campaign performance, conversion metrics, website touchpoint data, the customer journey, and financial metrics such as return on ad spend, cost per lease and net rental income.

■

REACH by RentCafe: Search, Reputation & Marketing Analytics

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 analyze and adjust your marketing strategy. Hear how REACH can help with creative design, search strategies, improving your online reputation and visualizing your results with an intuitive marketing analytics dashboard.

★★

REACH Marketing Strategy: The State of Search

Take a deep dive into the state of search marketing in this class by reviewing advanced aspects of SEO and PPC marketing. This class covers recent Google updates that may affect SEO strategy, how AI may impact the future of search and how your websites are showing in search. We also discuss how SEO and PPC efforts work together to increase traffic, and what we expect in the coming year for both SEO and paid advertising.

★★

REACH PPC: Driving Results with Targeted Ads

This class examines how pay-per-click (PPC) advertising can drive high-intent traffic and increase conversions for multifamily marketers. Focused on how both search and social paid ads influence the prospect journey, this session reviews current trends, data from Google and Facebook and tools for increasing the return on your marketing initiatives. We'll also touch on RentCafe Site Manager marketing features that will help to enhance your PPC efforts.

★★

REACH SEO: Search Insights for Stellar Performance

Learn how to align organic marketing initiatives with consumers' expectations while growing your website traffic and conversions. This class focuses on why organic search is an important channel in your marketing strategy. We'll review current trends in multifamily marketing, powerful optimization features in Site Manager and tips for capturing prospects with an expanded online presence.

★★★

RentCafe: Advanced Marketing Features

Take this class to become a RentCafe marketing genius. Learn about marketing industry terms and how they relate to RentCafe, along with extended marketing features such as interactive property maps, nudge marketing, featured floorplans and much more!

★

RentCafe Chat IQ: More than Just a Chatbot

Are you currently offering 24/7 customer service to your prospects and residents? RentCafe Chat IQ can help you provide around-the-clock customer service by enabling chatbot, textbot, emailbot and voicebot responses. Learn how you can improve your customers' experience and help your property team gain valuable time to focus on high-priority tasks.

★

RentCafe Condo Owner Portal & CondoCafe Certificates

Join us to learn about CondoCafe Certificates and CondoCafe Owner Portal. Certificates, our paperless pay-per-use solution, automates the purchase and delivery of status certificates and other publicly available documents. Owner Portal gives association owners the ability to make payments, review ledgers, store documents, submit requests and more.

★★

RentCafe CRM Flex: 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.

★★

RentCafe CRM Flex: Conventional Move-Ins & Transfers

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.

★★

RentCafe CRM Flex: Conventional Move-Out Process

Learn how to process move-outs more efficiently with RentCafe CRM Flex! This class includes an overview of the RentCafe CRM Flex workflow from the property's viewpoint. We cover the required settings and workflows for move-outs and deposit accounting.

★

RentCafe CRM Flex: 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.

■

RentCafe CRM IQ: Upgrading from RentCafe CRM Flex

RentCafe CRM IQ simplifies leasing and maximize customer satisfaction. This class will provide you with a comprehensive guide to upgrade from RentCafe CRM Flex to RentCafe CRM IQ. We will discuss the steps needed to upgrade, expected timelines for completion and what to expect during the process.

■

RentCafe Lease Docs: Introduction

RentCafe now offers a comprehensive lease document library from which you can access industry-standard forms specific to your property's location. This introductory class covers key features, system requirements and more!

■ **RentCafe: Introduction to Self-Guided Tours and Other Touring Options**

RentCafe Self-Guided Tours allow you to create more leasing opportunities while adding convenience for your residents. Join us to learn more about prioritizing safety with electronic ID verification, pre-screening your prospects, simplifying scheduling and improving the user experience.

★ **RentCafe: Marketing Website Design**

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.

★★ **RentCafe: Optimizing the RentCafe Applicant Experience**

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!

★★ **RentCafe: 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 customizations that meet their brand's requirements. Learn how to customize the property website's standard template with layout structure, branding colors, 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.

★★ **RentCafe & RentCafe CRM: Blue Moon Setup**

Blue Moon integrates directly with RentCafe, allowing you to seamlessly manage your Blue Moon leases from RentCafe Site Manager and CRM Flex. This class covers new features available in RentCafe Site Manager and CRM Flex for Blue Moon and recommendations for your Blue Moon configuration.

★★ **RentCafe & RentCafe CRM: Blue Moon Lease Execution**

Blue Moon integrates directly with RentCafe, allowing you to seamlessly manage your Blue Moon leases from RentCafe Site Manager and CRM Flex. This class covers how to generate Blue Moon leases and manage the leasing workflow up through lease execution.

★ **RentCafe & RentCafe CRM Flex: Communication Automation**

Are you using the automated tools available from RentCafe to communicate with your customers? This class will address autoresponders, email triggers and reminders, and follow-up emails in Site Manager and CRM Flex. We will also review the automation available from Chat IQ.

★ **RentCafe & RentCafe CRM Flex: 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 customize the resident experience and improve resident retention.

★ **RentCafe & RentCafe CRM Flex: Resources & Troubleshooting Basics**

Join us to troubleshoot common issues while leveraging reporting and the RentCafe toolset. We will also answer some frequently asked questions and show you techniques to find the answers.

★★ **RentCafe Student Housing: Exclusive Features**

Join us for a dive into features and workflows that are specific to CRM Flex Student. We'll cover topics such as joint and several occupancy management, tiered renewals, and new features such as application automation and the advanced document, move-in readiness and application dashboards.

■

RentCafe Student Housing: Introduction

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, supported leasing types and roommate matching.

★★

RentCafe Suite: New & Extended Features

This class reveals how to get the most out of your RentCafe software. What's new? What's trending? We'll cover the latest and greatest with RentCafe and discuss our favorite features that you can adopt into your workflows!

★

The New Renter Expectation: Paperless, Contactless & Frictionless

Learn how to create a contactless, frictionless and paperless rental experience for your prospects. We step through the entire leasing process - from initial lead to move-in and residency - just like your customer would. We use online chat and text, self-guided tours, digital ID verification, online leasing and even smart home tools. Learn how to offer a convenient and efficient leasing process for your prospects and your team.

Affordable

★

50059 Special Claim Functionality & Reports

This session provides information about using Voyager's special claims features to ensure that you are requesting all available HUD special claims for your properties. [50059]

★★

Affordable Ad Hoc Reporting

Reporting on property compliance can be challenging, especially for a property with state, city and local housing programs. This session discusses the new enhancements to Ad Hoc reports for the addition of the Local Program fields. We will be reviewing these new field options and discussing opportunities to meet the reporting needs of all subsidy program types including local programs. Time permitting, we will also discuss some of the new data elements available to support HOTMA and TRACS 203A. [All Subsidy Types]

★★

Affordable Housing Best Practices: Compliance Reports & Tools

This session provides information for helping your staff efficiently review and maintain affordable housing program compliance. We will showcase compliance resources available from the Voyager dashboard. (Part 2 of 2) [All Subsidy Types]

★★

Affordable Housing Best Practices: Dashboard Tools

This session provides information for helping your staff efficiently review and maintain affordable housing program compliance. We will showcase compliance resources available from the Voyager dashboard. (Part 1 of 2) [All Subsidy Types]

★★★

Affordable GPR: Report and Journal Entry & Reconciliation

This session is for advanced Voyager Affordable Housing users who analyze gross potential rent (GPR) for affordable housing properties. We will examine GPR report specifications and review the month-end accounts receivable reconciliation process.

★

Affordable Lease Renewal Process

This session provides lease renewal guidance for LIHTC, HOME and local program households that do not benefit from HUD 50059 or Rural Development assistance. [LIHTC, HOME, Local Program]

★★

Affordable Project Screen: Advanced

This session provides detailed information about Project screen setup for affordable housing programs including HUD 50059, Low Income Housing Tax Credit, HOME, Rural Development and local programs. [All Subsidy Types]

★

Affordable Project Screen Basics

This session provides detailed information about setting up an affordable housing project's basic and shared settings, including how to import required or common income limits for all types of affordable housing programs. [All Subsidy Types]

★★

Affordable Unit Transfers & Rent Changes

The new Affordable Rent Change function applies to all Affordable program types (50059, Rural Development, Tax Credit, HOME and Local Programs) in processing a rent change. The program type will determine what Voyager displays on the filter screen to help ensure the correct criteria are being populated. We will also cover the new affordable housing unit transfer procedure! Join this session to learn how to use this valuable tool. [All Subsidy Types]

★★

Affordable Y2Y Imports

We are excited to present a review of the new Affordable Yardi-to-Yardi (Y2Y) conversion tool. In addition to converting residential, financial and maintenance information from one Yardi database to another, you can now include affordable-specific information such as income limits, compliance settings and certifications.

★

Compliance Rule Changes for HOTMA

Participants will gain a clearer understanding of the provisions under the Housing Opportunity through Modernization Act of 2016 (HOTMA) that owners and agents of HUD Multifamily Housing will be required to implement for all 01/01/2024 certifications. This session highlights the major changes related to income, assets, mandatory deductions and interim reexaminations and best business practices for O/As. [All Subsidy Types]

★

Compliance Rule Changes for TRACS 203A

In anticipation of the upcoming release of TRACS 203A, this session strives to inform participants of the major differences between TRACS 202D and TRACS 203A and how to comply with the new requirements. Participants will leave this session with the compliance knowledge needed to successfully submit vouchers. [50059]

★★

Converting from TRACS 202D to TRACS 203A

With the impending change from TRACS 202D to TRACS 203A, Voyager's Affordable module will provide special features and functions to assist in preparing properties for the transition. This class and documentation will help you prepare your staff, properties and the Voyager database for the changes required to be successful with TRACS 203A. [50059]

★

HOTMA & Voyager Affordable

HOTMA final rule changes go into effect January 1, 2024. HOTMA affects all federal low-income housing programs. This class will discuss changes to Voyager to accommodate updated HOTMA requirements. [All subsidy types]

★★

HUD 50059 Monthly Processing

This session provides monthly processing recommendations for completing a 50059 HAP voucher. We will also review the components affected when a HAP voucher is created and posted in Voyager, including resident certifications, resident ledgers and the general ledger.

★★

HUD 50059 Voucher Reconciliation

This session provides guidance for correcting 50059 vouchers in Voyager, avoiding common voucher errors and correcting voucher discrepancies.

★

HUD FSS

In preparation for TRACS 203A, Yardi is working to add functionality to accommodate the HUD Family Self-Sufficiency (FSS) program. This session will introduce the required accounting setup and compliance functionality associated with the FSS program. [50059]

★

Introduction to Verification Services

Yardi Verification Services is the newest addition to the Yardi Affordable Housing Suite. Available for Voyager and Breeze Premier clients, Yardi Verification Services enables site staff to quickly request and receive critical income and asset verification directly into RentCafe Affordable Housing. [All Subsidy Types]

★

Leveraging RightSource for Compliance Efficiency

Participants will learn how to effectively use RightSource services to enhance the quality, timeliness and accuracy of certifications. You will learn how to link to files and findings, efficiently use the checklist feature, take advantage of the calculator and navigate the unresolved findings report, among other operations.

★★

LIHTC Average Income Test

To strengthen and increase availability of the LIHTC (Low-Income Housing Tax Credit) program, the updated Average Income Test (AIT) changes will allow tax credit qualified units to serve households earning as much as 80% of area median income (AMI) in a 60% restricted property. Join this class to learn about recent changes in AIT that will permit greater flexibility, keep the property in compliance while accommodating the loss of one or more LIHTC units and facilitating rents from higher income units. These changes will allow the LIHTC program to have a positive impact on more households and help improve property performance within a broader housing market. [Tax Credit]

★★

PBRA Rental Assistance Demonstration (RAD)

Since its introduction with TRACS 202D, the Rental Assistance Demo (RAD) program has grown to incorporate conversions from Rent Supplement, RAP and Moderate Rehabilitation program types. HUD has changed phase-in rules for TRACS 203A and introduced the concept of negative HAP for some RAD components. Join us for a discussion of these and other issues as we explore RAD changes. We will describe conversion situations and how to use new miscellaneous accounting request codes to zero first-year vouchers, bill for unit rehabilitations and recover negative HAP. [50059]

★

RentCafe Affordable Housing: Applicant Move-In Experience & Processing

This session explores and demonstrates features and procedures designed to manage online applications. Learn how the RentCafe Affordable Housing move-in workflow seamlessly ties into your Voyager software.

★

RentCafe Affordable Housing: Applicant Waiting List

Want to automate your waiting list applications or allow prospects to complete applications from anywhere in the world 24/7? This session provides an overview of the RentCafe Affordable Housing online waiting list experience from the applicant's point of view. [All Subsidy Types]

★

RentCafe Affordable Housing: New Features Update

Join this session to learn about the newest RentCafe Affordable Housing features available to your property managers and compliance team. [All Subsidy Types]

★

RentCafe Affordable Housing: Resident Recertification Experience & Processing

This session explores how to review an annual recertification completed by a resident in Site Manager, compare it to previous certification information, send verification letters and verify the information to create the resident's annual recertification in Voyager.

★

RentCafe Affordable Housing: Roundtable

RentCafe Affordable Housing provides extensive 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, HOME, Rural Development]

★★

RentCafe Affordable Housing Site Administration Tools

Learn about best practices and tools your administration team can use to configure RentCafe for an improved applicant, resident and site manager experience. [All Subsidy Types]

★

RentCafe Affordable Housing Site Manager & RightSource

Join this session to gain a clearer understanding of how workflows in RentCafe Affordable Housing Site Manager integrate with RightSource. We will focus on key data points within Site Manager to ensure that files are ready to be sent to your RightSource auditor. [All Subsidy Types]

This class list is subject to change at any time.

★★

Repayment Agreements, Part 1

This session reviews the steps required to begin using Voyager Repayment Agreements. TRACS 2.0.3.A requires significant changes to repayment agreement reporting. We will review global setup steps, adding in-progress agreements and setting up owner/agent agreements. (Part 1 of 2) [50059]

★★

Repayment Agreements, Part 2: Workflow

This session reviews repayment agreement procedures in Voyager for current residents. TRACS 2.0.3.A requires significant changes to repayment agreement reporting. We will show how to calculate the repayment agreement amount, add a new repayment agreement, review the ledger adjustments created by the repayment agreement, post repayment agreement charges and update repayment agreements. (Part 2 of 2) [50059]

■

RightSource: Introduction to Compliance Services

Join an introductory presentation of Yardi RightSource compliance services. Learn how Yardi can be your partner to help reduce the cost and complexity of compliance. Yardi RightSource can make it easier for your team to manage affordable housing properties with compliance consulting and integrated compliance processing. Learn about this unified solution that simplifies leasing, certifications and operations with RentCafe Affordable Housing, RightSource and Yardi Voyager. [All Subsidy Types]

★★

Rural Development Best Practices

This class will include reporting and reviewing the MINC Project worksheet, MINC reporting and Management Fees. We will demonstrate the new Rural Development Management Fee calculation and posting functionality in Voyager. This workflow is intended to increase accuracy and efficiency in the calculations of monthly per-occupied door management fees. [Rural Development]

★

Rural Development Monthly Procedures

This session provides Rural Development monthly processing recommendations. It also reviews components, including resident ledgers, assigning rental assistance and RA accounting, that are affected when Rural Development monthly posting is completed in Voyager. [Rural Development]

★

Spotlight on Affordable Housing

Join us for a discussion of recent and upcoming product changes. We will highlight important features that can help streamline your organization's processes and guide you to affordable housing classes at YASC North America that will provide more details. [All Subsidy Types]

★

Top 10 Compliance Audit Findings & How to Avoid Them

Leveraging RightSource's global findings database, participants will learn the top 10 findings across all certifications and how to avoid them when submitting certifications to RightSource. This session aims to improve the quality of certifications uploaded by site staff to ultimately reduce the number of resubmissions leading to faster file completion.

PHA

★

Executive Dashboards with Asset IQ

Asset IQ for PHA provides dashboards into key PHA activities. Designed to give executive staff an overview of PHA operations, productivity and actionable information, this product gives leadership team members the information they need to make data-driven decisions.

HOTMA: New Regulatory Changes for PHA

Housing Opportunities Through Modernization Act (HOTMA) regulations will impact all PHAs in the U.S. This class will describe how these new requirements will be implemented in Voyager with an emphasis on new screens, functions and reporting.

★

Housing Information Portal (HIP): The Future of REAC

Housing Information Portal (HIP) is HUD's new repository for 50058 data. Representatives from HUD and Yardi will explain the upcoming transition, highlight new Voyager features and provide insight into HUD's exciting new technology for the PHA industry.

★

HUD Panel: Technology Updates for PHA

Join HUD REAC staff to learn about HUD's latest technology initiatives in this high level overview. HUD is making major innovations to technology platforms. Learn how these exciting changes will benefit your agency!

Maintenance & Inspection IQ for PHA

Maintenance & Inspection IQ provides dashboard-driven insight into critical PHA features. This class will include an overview of new Housing Choice Voucher routing tools and a review of Vacant Turn dashboards that will help identify opportunities to make the most efficient use of your maintenance and inspection resources.

★

Maximize Funding with VMS Reporting

Voucher Management System (VMS) is a cornerstone of HUD reporting for the Housing Choice Voucher program. This class will discuss the latest changes to VMS, explain the underlying logic that determines how the report is populated and review other supporting reports for VMS.

NSPIRE: Understanding the New Inspection Protocol

National Standards for the Physical Inspection of Real Estate (NSPIRE) is HUD's new inspection protocol that will replace REAC and Housing Quality Standard (HQS). Topics in this class include integration of the NSPIRE protocol, suggested scoring and insight into Yardi's future plans.

★★

Optimize FSS Program Use

This session will cover the latest changes in the Family Self Sufficiency program as well as provide an overview of how to manage escrow reporting in Voyager.

★★

PHA Audit Reports & How to Correct the Data

A number of standard audit reports are available in the PHA product to help monitor and manage exception cases. This class will review the purpose of many of these reports and illustrate what to look for in them. Where appropriate, we will navigate the process of correcting the underlying data. This class will provide an understanding of how to use the audit reports to monitor exceptions and ensure better overall operations.

★

PHA Best Practices: HCV Briefing & Request for Tenancy Approval

This class will focus on Yardi's latest RentCafe features for online briefings and Request for Tenancy Approvals. Leveraging the power of RentCafe, PHAs can brief applicants, issue vouchers, onboard new landlords and process RFTA documentation online to help increase landlord retention.

★

PHA Best Practices: Recertification Processing

Recertifications are an integral part of an agency's daily activities. This class will teach you how to leverage Voyager and RentCafe PHA to effectively and efficiently recertify families. Topics will include best reporting practices, online recertifications, streamlining verifications and communications with participants.

★

Spotlight on PHA

The Spotlight on PHA is an opportunity to get a high level overview of changes, new features, products and services that impact the PHA product and clients. Learn about Yardi's response to HUD changes and our development roadmap.

★

Tracking Requests with Case Manager

Case Manager is an exciting new ticketing system designed for PHA and Affordable clients. Dashboards and task-driven cases allow insight into internal and external communications to track Reasonable Accommodation, requests for information and other activities. Integration with Voyager gives everyone seamless visibility to improve the depth of relationship with clients and partners in the community.

★

Understanding Moving to Work (MTW) Basics

Moving to Work is a HUD demonstation program that allows agencies to modify compliance rules. Learn how Yardi can help you manage Moving to Work and Moving to Work Expansion 50058s with this basic overview of features.

This class list is subject to change at any time.

Other Residential

★

ID & Income Verification: Best Practices

Minimize fraud, reduce manual efforts and save time during your leasing process. Verifying the identity and income of each applicant is a crucial step in protecting your business. With Yardi ID Verify and Income Verification you can: • Deter potential fraudsters from the very start • Leverage AI automation to reduce manual effort and increase consistency • Save staff hours for higher value activities • Keep your assets safe – your team, residents and the bottom line.

■

ID & Income Verification: Introduction

In an era of growing applicant fraud, join us for a look into how Yardi is mitigating this risk with an ID Authentication solution built into RentCafe.

■

Introduction to Elevate Manufactured Housing Manager

Join this sales demo to learn how MH Manager will help you grow and manage your Manufactured Housing portfolio by taking advantage of all the functionality available in this power set of features. We'll give you the "view from 10,000 feet" so that you can see the benefits of adding MH Manager to your Voyager stack.

★

Manufactured Housing Basics

Join this introductory class to learn how Elevate's MH Manager can help you track the status of lots, homes and residents; calculate loan amortizations; and manage the home title process. We will review generalized workflows for both community-owned and resident-owned parks, setting up lot types and lots and creating a site map. We'll also cover dashboard features and our most commonly used reports.

★

Military Housing: New Features Update

This session will provide a review of upcoming features and functionality in Voyager Military Housing.

★

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 class provides an overview of ResidentShield renters insurance's two options, ResidentShield HO4 and ResidentShield Master Policy Program, and will cover topics such as workflow, features, customization and analytics.

★★

ScreeningWorks Pro: Best Practices

Attend this class to learn the basics of ScreeningWorks Pro (Resident Screening in Canada). Learn about the services Yardi offers, our scoring model and our approach to screening. We will also demonstrate the seamless integration with Voyager and system implementation. The class also provides a comprehensive overview of the features, customization and analytics that are available.

■

ScreeningWorks Pro: Introduction

Attend this class to learn the basics of ScreeningWorks Pro (Resident Screening in Canada). Learn about the services Yardi offers, our scoring model and our approach to screening. We will also demonstrate the seamless integration with Voyager and system implementation. The class also provides a comprehensive overview of the features, customization and analytics that are available.

★

Single Family Homes: Basics

This class covers the fundamentals of the Single Family Homes module. We will discuss its features, benefits and functionalities. SFH Voyager, SFHCafe and SFH CRM will all be reviewed at a high level.

Senior Living: Community Management

★★

Senior Living: Adding Communities & Supporting a Growing Organization

Property acquisitions can be an exciting and challenging phase of property management. Join as we guide you through the steps for adding communities to your Yardi portfolio quickly, efficiently and with minimal disruption. Topics include obtaining additional unit licensing and adding properties, units, bank accounts, services and more. We will also illustrate the methods for converting and integrating external data to your Voyager environment.

★

Senior Living: Operational and Executive Analytics

Learn how operators are using Senior IQ to see trends in their Yardi data and share them within their organization. You can expect a demo of the brand-new Executive Director Overview dashboard — and you will see how to use Senior IQ to import labor data for wage and hour analysis.

★

Senior Living: Resident Lifecycle & Billing: Private Pay and Medicaid

Attend this course to master the tools you need to properly manage your census and generate accurate billing and statements for your payers.

★

Senior Living Suite: The Efficiency of an Integrated Solution

Come discover how our fully integrated, single connected solution — the Yardi Senior Living Suite — drives unparalleled success by connecting every facet of your organization on a single platform. This session will reveal the challenges with using disparate systems then show how in comparison, our single-stack software alleviates every obstacle and drives efficiency. We will demonstrate how Yardi tools including RentCafe Senior CRM, Yardi EHR and Senior IQ connect seamlessly to save you time, streamline workflows, eliminate errors, empower staff, improve resident services and more. You'll see how with Yardi, you gain more than other solutions offer when it comes to integration — including centralized, readily-updated data housed in one secure location.

★★

Senior Living: Voyager Best Practices: Setup & Administration

Enjoy an overview of the setup options available and best practice recommendations for fundamental elements of your Voyager community management software. System-wide components, as well as community-specific settings that affect billing and other routine procedures, will be discussed. This session will also explore the nuances of configuring senior housing units and services.

★

Senior Living: Voyager New Features Update

Watch as we examine some of the newest features included in our latest Voyager Senior Housing releases including support for entrance fees and the ability to import rate increase batches.

★★

Senior Living: Voyager Toolbox: Tips & Tricks

Learn tips and tricks for the most commonly-used senior housing setup and admin toolbox functions. This session will look at toolbox items tailored to senior living and how they can assist with property management and accounting operations. We will also discuss the common issues these tools can resolve — and demonstrate how to perform the functions.

★

Spotlight on Senior Living

Join us as we discuss the evolution of our technology solutions and look forward to exciting changes planned for the coming year! We will highlight the Senior Living Suite's migration to our Elevate platform and announce several key updates.

Senior CRM & Cafe

■

RentCafe Senior Living: New Features, Wellness & Roadmap

Join us as we review enhancements to our RentCaffeine websites, RentCafe Senior Living Resident and Family Portal and new RentCafe Wellness module. Learn how to get the property marketing website of your dreams. See how our out-of-the-box features assist in attracting and feeding new leads directly in RentCafe Senior CRM. Discover new and extended features in the RentCafe Senior Living Portal including shared payments and access to resident statements. Discover how your community staff can use RentCafe Wellness to manage their community's wellness programs, analyze each resident's wellness trends, boost revenue by offering paid activities and ultimately drive efficiency — all within a single connected solution. This is a great class for both existing clients as well as those who are new to RentCafe Senior Living.

★★

Senior CRM: Conversations & Correspondence

Together, RentCafe Senior CRM and RentCafe Conversations make communication and correspondence easier. Discover ways to send automated and personal correspondence to prospects and families via email and SMS, and ways to track inbound and outbound recorded calls.

★★★

Senior CRM: Electronically Signing Documents & eLeasing

Join us as we cover enhancements to the proposal workflow in RentCafe Senior CRM, including improvements to the concession configuration. We will also explore the power of electronic signatures in your resident agreements and ancillary documents.

★

Senior CRM: Mobile App Review

Come along for a tour of the RentCafe Senior CRM mobile app's enhanced design. We will dive into important updates, review functionality and collect your feedback to drive future enhancements.

★

Senior CRM: New Features

Explore the abundance of new features added to RentCafe Senior CRM over the last year. This session will review the new functionality in detail so you can ensure you're maximizing your use of the product.

★★

Senior CRM: Pipeline Management

Learn to use and configure RentCafe Senior CRM's advanced tools to help manage your sales pipeline, improve the prospect journey and provide better coaching. This session will show you how to leverage these tools including Lead Stages, Lead Score, Follow-Ups and more!

■

Senior CRM: Product Roadmap & Focus Group

Exciting changes are on the horizon for RentCafe Senior CRM! This session will share what innovations are coming and encourage feedback on what YOU are looking for in the future of the product. Make your voice heard and join this discussion on future plans for enhancing RentCafe Senior CRM.

★★

Senior CRM: Success Analytics

Enjoy the debut of Senior IQ's new CRM dashboards: CRM Success Metrics, Lead to Speed Analysis and Leasing Doc Workflow. These new dashboards allow users to identify trends at the sales counselor, property and portfolio levels.

Senior Living: EHR

★★

EHR Best Practice Management of Assessments & Service Plans

Enjoy this comprehensive class focused on assessment configuration to help you derive maximum value from the Assessment and Service Plan modules. The class covers various aspects including Yardi's Health and Service Evaluation, State-Specific Assessments, Ancillary Assessments and Custom Assessments. By attending this session, you will learn the essential steps for configuring and modifying assessments such as linking care plan items, setting default care task schedules and configuring triggered assessments. Additionally, the session provides insights on the assessment versioning process, enabling you to effectively modify and update assessments over time. Overall, you will be equipped with the knowledge and skills needed to optimize assessment configurations and enhance your use of the Assessment and Service Plan modules!

★★

EHR Billing Recommendations Best Practices

Our Billing Recommendation feature is the critically important bridge between Yardi EHR and Voyager Senior Housing. When managed correctly, it enables streamlined billing and creates efficiencies. This session will cover the integration, setup and functionality of the service plan recommendation, as well as chart-based/AdHoc billing. Come see how effective use of Billing Recommendation ultimately drives greater returns for senior living providers.

★

EHR Clinical Analytics

See how to analyze EHR data at a portfolio and property level with Senior IQ's robust set of clinical dashboards! From assessment results and scheduled versus completed charting, all the way to incident analysis and acuity trends, Senior IQ is the best way to analyze EHR data and share among corporate teams, as well as with community clinical teams.

★★

EHR Community Rollout & Adoption

Watch as we cover the process for implementing EHR assessments, care plans and an interfaced eMAR during a community rollout. We will also discuss ways to track and support EHR adoption at new communities and preview Yardi's new EHR webinar series.

★★★

EHR & eMAR Interoperability

Attend this session to see how our interfaced eMAR — and access to the Health Information Exchange (HIE) through our partnership with Kno2 — delivers efficiency, accuracy and risk reduction in resident care. You will discover the available EHR interface options including pharmacy and ePrescribing, device integrations, HL7 and HL7 FHIR as well as supporting care transitions and health provider coordination via HIE connectivity. This session will also cover recommended best practices that ensure you get the highest value from exchanging clinical information.

★

EHR New Features

Join us as we highlight exciting new features included in the EHR 7.17 and 7.18 releases including profile changes, enhanced digital signatures, assessment and care plan updates, Care Stream enhancements, community-specific tasks and new reports.

★

EHR eMAR New Features

Come learn about exciting enhancements to Yardi eMAR — all created to provide you with a simplified end user experience. This session will cover new features from the EHR 7.17 and 7.18 releases including a new eMAR dashboard, order creation screen updates, new medication guides, admin history reports, order direction templates and Care Stream charting enhancements.