

CLASS DESCRIPTIONS



V I R T U A L

MARCH 11 - 12, 2025

#YASCVirtual

ACCOUNTING

Automating Voyager Management Fees

Explore Voyager's management fee functionality and its enhancement of the pay commission functionality. Learn how to let Voyager track and calculate your management fees and create payables on a recurring basis. We'll demonstrate new functionality that lets you enter AR on your corporate books for the pending income.

Correcting Resident & Tenant Ledgers: Introduction

Accurate resident and tenant ledgers are essential for successful property management. We will review the ledger, show how to create adjusting transactions to ensure balanced ledgers, consider common issues that can occur and identify preventive measures to avoid problems. *This class does not cover content relevant to HAP or other specialized ledgers.

Correcting Resident & Tenant Ledgers: Advanced

Accurate resident and tenant ledgers are essential for successful property management. Attend this advanced class to ensure your books and tie-out process are accurate. We will show how to create adjusting transactions for charges, receivables, deposits and refunds to ensure balanced ledgers and receivable reports. *This class does not cover content relevant to HAP or other specialized ledgers.

Introduction to Voyager Intercompany & Cross Entity Transaction

Learn about the two ways to allocate expenses in Voyager: intercompany and cross entity trans. Intercompany creates system-generated due to and due from journal entries to track allocations for related entities, while cross entity trans is used for billbacks (cost allocation using charges and payables). 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 the GPR journal entry function. We will cover how the report and journal tie to each other and review corresponding effects on the general ledger. Learn how to troubleshoot GPR tie-out issues and ensure accurate reporting of your financial position.

Voyager 8 Period Close Dashboard

This class provides a comprehensive guide to navigating and using the Voyager 8 Period Close Dashboard for efficient financial management and reporting.

Voyager 8: Introduction & Upgrade Overview

Voyager 8 has arrived with significant updates to the Voyager 7S experience. This class will provide a high-level overview of Voyager 8 and what to expect during the simple upgrade process. Voyager 8 is positioned to help you navigate the future of infinite possibilities.

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. Custom account trees allow you to create special or unique views of your accounts. Voyager 8 makes the process of creating and managing account trees even easier. Discover how our Voyager 7S and new Voyager 8 tools can save you time streamlining and customizing accounts trees to improve your report-writing processes.

Voyager Automatic Bank Reconciliation

This class will show how you can save time and improve accuracy with the automated functionality available in Voyager 7S and Voyager 8.

Voyager Bank Reconciliation

Learn how Voyager helps make the bank reconciliation process a snap! In this session, we'll cover the prerequisites for a bank reconciliation, explore the bank reconciliation process and discuss useful reporting tools.

Voyager Financial Analytics

Voyager contains powerful reporting tools for viewing financial data in a variety of ways. Using the new Voyager 8 upgrade as well as the current Voyager 7S platform, this class will review obtaining overview and detailed reports; breaking 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 will also cover commercial- and residential-specific reports, report packets and dashboard reporting functionality.

Voyager Financial Best Practices

Join this session to learn how Voyager promotes accounting best practices along with efficiency and accuracy. We'll cover general ledger account setup, month-end procedures, the importance of transaction dates, task automation, optional financial database packages and other topics.

Voyager Financial Reporting Overview

Learn how to use Voyager to streamline financial reporting. This introductory 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 Month-End Tie-Outs: AR, AP & Security Deposits

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

Voyager Segmented Accounting

Learn how GL Segments, which allows users to add details about transactions, can increase reporting capabilities without increasing the number of GL accounts in your system. See how validation rules keep users from making mistakes and how segment details combine with financial reports to deliver more insight into GL accounts, with fully customizable tracking and any level of detail.

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 introduce you to the relevant database tables and educate you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting.

Custom Financial Analytics: Introduction

Custom analytic reports leverage a quick, customizable, front-end report builder. In this introductory class, users will learn the different template types, the list of tokens that may be used for dynamic dates, how to create a custom analytic template and the available Voyager data types. Topics will include prior period comparative reporting and variance analysis for one property as well as for a property list or portfolio.

Voyager 8 Reporting Capabilities

Get a first look into Voyager 8 reporting capabilities. We will review new functions such as multiple saved filters, personal report visual modifications and search functionality. We'll also explore new reports and layouts.

Yardi Spreadsheet Reporting Overview

Yardi Spreadsheet Reporting (YSR) enables report designers using Voyager to create report packets of individual documents designed in Microsoft Excel or Word. This class will offer an overview of the product's capabilities and help you understand the basic components of creating boardroom-quality YSRs.

TECHNICAL

Voyager Automated Tasks & Notifications

This class will show how to set up automated email notifications and tasks based on workflows, 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 Security

Enhance your expertise in Voyager 8 security! Delve into comprehensive coverage of roles, admin reports and the intricacies of customizing roles and managing access for Voyager 8.

Voyager System Administration Toolbox

Join this class to become familiar with commonly used functions in the Voyager system administration toolbox. Explore how to use built-in tools to resolve common data issues and requests. See how utilizing these features can boost your business with quick resolutions to monthly roadblocks and fewer case requests.

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: Overview

During this class you will see how the Yardi cloud can integrate with the Office 365 cloud. Learn how to redirect the Voyager and/or Elevate suites directly into Yardi-dedicated SharePoint online site collection(s). See the value of organized structures, taxonomy, autonomous security management, easy-to-use navigation tools and seamless integrations into Outlook.

Yardi Document Management for SharePoint: Advanced Topics

This advanced training session explores the seamless integration between the Yardi cloud environment and Microsoft Office 365, unlocking new levels of efficiency and collaboration for the organization. Designed for experienced Yardi and Office 365 users, this class will demonstrate how to leverage Yardi Voyager and Yardi Elevate with a dedicated SharePoint Online site collection to streamline operations and improve document and workflow management

YardiOne: Best Practices

In this class, we'll explore recommended best practices for leveraging YardiOne effectively. Additionally, you'll discover valuable insights and techniques aimed at optimizing your business operations through YardiOne.

YardiOne: New Features

Join us to explore the newest functionalities offered within YardiOne. This session will dive into the updates and enhancements made over the last year.

Yardi Replicate: Overview

Yardi has partnered with Qlik to provide real-time replication of Yardi Voyager data to any existing warehouse environment such as Snowflake, Amazon AWS and Microsoft Azure. This class will show how to efficiently move data from the Voyager private cloud to other cloud environments and control its scope and destination. We'll show how to leverage third-party tools to analyze and report on Yardi data for unprecedented insight.

ASPIRE

Aspire: Introduction to Yardi's Learning Technology

Find out how Aspire can deepen knowledge, save time, reduce errors and improve training efficiency by bringing together fully customizable Yardi software training with critical industry-specific topics. See how to combine the accountability, reporting and efficiencies of a learning management system with a complete authoring tool set, game engine, policy hosting, and event and webinar management system. Yardi Aspire delivers training at the moment of need with recommended courses embedded in Yardi software workflows and playable on the Aspire mobile app for on-the-go employees. Learn how to connect your university with HR systems to fully automate your training for all onboarding and continuing education.

Effective Learning Experiences for On-the-Go Employees

Learning needs arise throughout the day. In this class, you'll learn how to capitalize on tools that enhance the learner experience and support learning on the go through the Aspire mobile app. Learn how Yardi Aspire delivers access to live training events, learning plans, policies, training videos and more. Learners can earn points and badges, complete surveys, sign documents and more through the platform. Learn how Aspire is making training in property management more easy, flexible and accessible.

Event Excellence: Optimizing Live Training from Start to Finish

Discover the power of Aspire's comprehensive event management module to save time and provide a seamless approach to marketing, registration and attendance tracking for instructor-led training. Learn the art of creating engaging events with streamlined registration management and integration with meeting providers. Unleash your creativity using design templates and targeted marketing strategies to connect with your target audience. Immerse yourself in actionable analytics that deliver valuable insights for continuous training event enhancement.

Practical Guide to Developing & Assigning Personalized Learning Plans

Organizations can personalize learning experiences for maximum impact. This class delves into effective techniques for crafting personalized learning plans that align with your organization's strategy while catering to the specific needs of key roles. Gain expertise in creating and assigning personalized learning plans that consistently deliver the right content to the right people at the right time. Learn how to customize Yardi templates to meet your business needs. Join us and discover how you can revolutionize your training with Aspire's training management tools.

Unlocking Employee Performance with Yardi Aspire Reporting

Learn how Aspire dashboards help you monitor activity and training compliance trends by individual, property, department and more. Learn to identify emerging skills in your organization and how to keep required training on schedule. This class will also dive into Aspire's comprehensive reporting tools that allow you to find relevant information and customize exports for actionable insights. Discover tips and tricks that save time and allow you to answer questions quickly review activity and drive your team's success to new heights!

Quick Course Creation: Developing Engaging Custom Learning Content with Yardi Aspire

Learn how to create fully interactive and visually stunning content in a matter of minutes! Whether you're a novice or a seasoned Aspire author or admin, you'll walk away with valuable tips, tricks and insights for creating a vibrant learning experience with your Aspire courses. This class covers establishing initial content with the course builder tool and personalizing design with pre-built templates. It also includes elements such as voiceover and concludes with a quick exam. Learn how to apply similar authoring concepts to other content, including announcements, resources and letters.

ENERGY

Bill Pay Express for Utilities

Tired of utility vendors misapplying payments, charging late fees and sending disconnect notices? Join this class to learn how Bill Pay ensures proper allocation of payments and significantly reduces the likelihood of late fees and disconnects. Users must be Yardi Energy Services program clients to take advantage of the Bill Pay Express solution.

ESG Sustainability Reporting & Benchmarking

Yardi can help you attain 100% whole building data coverage for building performance and sustainability energy, water and waste reporting. Learn about tools for ensuring your buildings meet ENERGY STAR® benchmarking requirements. We'll also show our new GRESB reporting product offering.

Yardi Energy Solutions for Residential & Commercial

Learn how the Yardi Energy Suite, an automated utility management system with no interfaces to third-party systems, can streamline utility billing, utility invoice processing, sustainability reporting and building energy efficiency. See how the suite improves visibility to your energy data to help drive down controllable costs and increase asset value.

MAINTENANCE

Facility Manager: Inspections Overview

Join this class to discover tools for creating and executing inspections. Gain insight into the process of setting up recurring or on-demand inspections to meet your property's annual requirements and incident reporting standards. Explore the user-friendly inspection dashboard, designed to offer oversight and ensure tasks are accomplished completely and promptly. Additionally, learn to initiate and complete on-demand inspections seamlessly using our mobile app.

Facility Manager: Mobile App Overview

This class will demonstrate the Facility Manager role-based app tailored for technicians, engineers, supervisors and property managers. See how users can seamlessly create and manage work orders and inspections as well as execute preventive maintenance. Gain insight into how supervisors can efficiently assign work to team members and oversee their workload. The app also supports push notifications and works offline.

Facility Manager: Overview

This class will provide an overview of managing work orders and inspections within Facility Manager. We will show how to utilize the work order and inspection dashboards to focus on the essential oversight data that ensures work is assigned and completed on time.

Facility Manager: Preventive Maintenance & Equipment Overview

Join this class to learn how Facility Manager can help you manage preventive equipment maintenance. We'll discuss how our template-based approach helps streamline the setup of equipment and preventive maintenance tasks, enabling an effective preventive maintenance program across your portfolio.

Facility Manager: Work Order Overview

Join this class to learn how to execute the work order lifecycle in Facility Manager. From the initiation of a work order by your internal staff or tenants via the CommercialCafe tenant portal through the billback accounting process. Learn how to monitor response and completion times for work orders, generate estimates for tenant approval and receive notifications at each stage of the process.

Fixed Asset Manager: Overview

This class details the Fixed Assets Manager module. The instructor will review setup and usage, which includes creating fixed assets and calculating, posting and reporting on depreciation. You'll also see new features and our roadmap.

Maintenance IQ for Multifamily: Inspections

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

Maintenance IQ for Multifamily: Mobile App

Maintenance IQ has a multitude of tools that aim to streamline productivity in your workday. This class will be geared toward the Maintenance IQ Mobile application and its functionality for work orders and inspections.

Maintenance IQ for Multifamily: Unit Turn

Join us as we show 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.

PAYMENT PROCESSING

Advanced Payment Processing

Attend this class to dive deeper into Payment Processing. We'll discuss how payments are processed and delve into more advanced topics. These topics include closing the month and bank recs, reporting options, troubleshooting and using admin utilities.

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: Payment Processing Introduction

Attend this class as we dive into accounts receivable in Voyager 8. We will demonstrate new features and how to manage all accounts receivable activities in one location. Learn how easy it is to navigate to reports, tenant ledgers 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! This class provides an overview of the interface on Voyager 8, enhancements to the resident experience and security.

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: Overview

Learn how Bill Pay and Bill Pay Express can automate payments to vendors, owners, tenants and residents. Simplify payment times and the application of those payments for all types of invoices.

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

This class examines setup and functionality best practices for the PayScan element of Yardi Procure to Pay that make the AP process seamless.

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: 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 current 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 Procure to Pay mobile app.

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

Spotlight on Commercial

Join us for a fast-paced tour of our commercial management product suites. We'll provide overviews of our strategic product footprint and roadmap for Voyager 8 for Commercial, Elevate, CommercialEdge, CommercialCafe, Procure to Pay and Pulse. We'll also touch on some exciting new products including Yardi Data Connect, Floorplan Manager and Tenant Shield.

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 use 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 and ad hoc reports.

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 and correspondence.

Commercial Recoveries: Introduction

Join this class to learn how the Voyager recovery tool set helps users accurately process CAM recoveries. The instructor will review recovery reconciliations and tenant charge schedule adjustments using our intuitive tool set 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.

CommercialCafe Tenant Portal: Introduction

Explore how CommercialCafe Tenant Portal can deliver best-in-class experiences for tenants including 24/7 access to online payments, statements, documents, 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 new Facility Manager integrations, multi-lease payments and more! This class will also highlight new features and what's coming.

CommercialEdge Deal Manager: Overview

This class will explore the deal pipeline, deal navigation and review, and the process of comparing deals to budgets and prior tenant data. We'll also dive into space availability from a stacking plan point of view, along with the Tenant dashboard that tracks in-place leases. We'll take a brief look at our Legal Manager product that sits on top of Deal Manager and pulls deal data into lease templates, allows in-house editing and transmits leases for e-signature.

Elevate: Client Panel Discussion

Get an inside look at the process of selecting, implementing and using Yardi Elevate as a single connected solution for portfolio management. This client panel will address how Elevate solutions are evaluated and successfully implemented from Yardi administrator/implementor and end user points of view. This class is valuable to those considering adopting Yardi Elevate solutions and to those seeking to get more from the tools already in place.

Floorplan Manager for Commercial: Introduction

Whether you have office, retail or industrial properties, Yardi Floorplan Manager, our newest commercial product, can bring significant value to your marketing, leasing, construction and property management workflows. Learn how to integrate lease data into your CAD floor plans to add context and make data-driven decisions. See how to import, view and edit CAD files, and create alternate floorplans for marketing purposes. Calculate rentable and usable areas according to the major standards (e.g. REBNY, BOMA, etc.) for redemised space and feasibility studies.

TenantShield: Introduction to Tenant Certificate of Insurance Management

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

Virtuoso Assistant: Introduction

Virtuoso Assistant is here to help you with your daily tasks in Voyager 8! Learn about this new artificial intelligence tool and what it has to offer.

Virtuoso Mobile: Introduction

Leveraging Yardi's artificial intelligence technology, Virtuoso Mobile is here to automate common tasks and help prioritize the most important ones.

Virtuoso: Yardi's AI Engine

Learn how Yardi is planning to leverage AI within the Voyager 8 framework to help streamline and simplify your business processes. We'll walk through real-world use cases in which AI will be leveraged within our product stack.

Voyager 8 Commercial Late Fees

This session provides an overview of managing late fees within Voyager 8. Topics include setting up the various late fee options in Voyager 8, posting late fees and utilizing reporting tools for analysis. Ideal for property managers, accountants and administrative professionals, this class will help you maintain financial accuracy and efficiency in your commercial properties.

Voyager 8 Commercial Overview

This class will explore the features and benefits of Voyager 8 for Commercial, a robust solution designed to manage all aspects of commercial lease administration. Join us 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.

Voyager 8 Navigation

This session will explore the basic navigation of the Voyager 8 Commercial role. Voyager 8 is designed to manage all aspects of commercial lease administration. We will focus on the main toolbar, exploring functions and features such as the menu bar, tab duplication, favorites and Help Center. The class will also cover the Saved Filters functionality and dashboard filtering.

Voyager 8 Workflows

This class will delve into the new workflow features available in Voyager 8. Participants will explore workflows for amendments, commercial leases, customers, spaces and space redemise. The class covers setup fundamentals, walks through example workflows, and provides an overview of our workflow dashboards and reports. Attendees will gain familiarity with the system's unique commercial workflows, empowering them to maximize system features effectively.

Voyager 8: Commercial Lease Administration, Advanced Topics & Related Reporting

Explore the commercial lease management functionality in Voyager 8 and discover how it helps the end user manage all aspects of commercial lease administration. Join this class to see the simplified user experience for setting up leases, amendments, advanced areas (clauses and options) and the reporting associated with each area. See how easy it is to create remeasurement amendments, add functionality for subleases, conceptualize master leases and much more.

Yardi Data Connect for Power BI: Commercial Introduction

Yardi Data Connect is a next generation BI offering that leverages Microsoft Power BI technology. Learn about using its secure API to stream data from one or more Voyager databases into a 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, join us to learn more.

Yardi Data Connect for Power BI: Commercial Advanced

Yardi Data Connect is a cutting-edge business intelligence solution that offers extensive customization and seamless third-party integrations. This advanced class will cover the entire BI process, from data extraction, transformation, modeling and visualization to ensuring data security. Get a peek into sophisticated features, including Gen2 Dataflow, Data Warehouse, Lakehouse and Azure SQL Database, that provide valuable insights to manage and analyze data effectively. See how to unlock data's full potential and transform it into actionable insights, compelling visualizations and customized BI solutions that drive informed decision-making and enhance business intelligence capabilities.

CONSTRUCTION

Construction Basics

This class will provide a comprehensive overview of Elevate Construction Manager functionality. We'll dive into creative and effective ways to use Construction Manager, highlighting key features to help you get the most out of this powerful tool.

Construction Draws & Receivables

Attend this class to dive into the construction draw process in Elevate Construction Manager. We'll guide you through configuring funding sources, navigating the Draws dashboard, creating draw worksheets and packets to effectively track receivables.

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: Capital Planning

Join this class to explore how the Construction Manager Capital Planning feature helps your team maintain a comprehensive list of capital expenditure (CAPEX) requests for building maintenance, upgrades, tenant improvements and more. Learn how this feature captures up to 10 years of budgeting requests, streamlines job creation, and integrates seamlessly with Forecast Manager and Valuation Manager.

Construction Manager: Construction Management Fees

Gain a comprehensive understanding of Construction Management (CM) fees, which represent the costs associated with the management services for construction jobs. This session will teach how to effectively manage, track and integrate CM fees into the overall project budget for improved financial oversight.

Construction Manager: Forecasting

Discover how simple forecasting can be with the refreshed look and enhanced functionality in Elevate Construction Manager. With brand-new options and a completely redesigned UI, this is a session you won't want to miss. Join us to see how these updates can streamline your job forecasting process!

Construction Manager: Legal

This class provides an in-depth overview of the Legal feature in Construction Manager, a powerful set of tools designed to streamline legal document management. You'll learn how to create, store and edit legal documents with ease, leveraging integrated redlining, version control and built-in electronic signature functionality. Enhance your workflow by mastering these essential tools for efficient legal management within Construction Manager.

Construction Manager: Project Management

Part of Yardi Elevate, Construction Manager redefines how asset, development and project managers view job cost data. Join this class to discover how Construction Manager enhances job data by tracking milestones, assigning risk levels, calculating cost per square foot and much more. Don't miss this opportunity to learn how to elevate your project management process.

Construction Manager: RFPs & Vendor Management

Learn how to simplify and streamline the bidding process with Construction Manager. This class will show how to efficiently manage the entire workflow, from sending out an RFP and awarding contracts to processing vendor payments. Don't miss out on this opportunity to optimize your vendor management process!

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 take your wish list of anticipated spending from the Capital Planning tool in Construction Manager; pull that list and in-progress jobs into your overall property budgets using the easy sync tool in Forecast Manager; approve capital planning and convert it into actual jobs that you will transact against; and re-sync in Forecast Manager to see those newly created jobs reflected in your property budgets.

FORECASTING

Advanced Budgeting & Forecasting: Reforecasting

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 smoother and more 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: 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 spaces that may require leasing assumptions and 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 spaces on a property for budgeting purposes. This class will also review the detailed and flexible Lease Status Report, along with lease-level and space-level cash flows.

Forecast Manager: Recent Enhancements

We will highlight key enhancements that have been released in the past year and cover recently implemented new features.

Forecast Manager Workflows: Managing the Budget Approval Process

Learn how workflows in Forecast Manager can help you manage the budget approval processes. We'll show how to design workflow steps to run a specific number of days and lock specific parts of the budget while in progress. See how to use Start Actions and Finish Actions to automate actions, such as creating a task, sending an email or running a procedure, at the beginning of a step or before moving to the next workflow step.

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 take your wish list of anticipated spending from the Capital Planning tool in Construction Manager; pull that list and in-progress jobs into your overall property budgets using the easy sync tool in Forecast Manager; approve capital planning and convert it into actual jobs that you will transact against; and re-sync in Forecast Manager to see those newly created jobs reflected in your property budgets.

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 valuation 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, as well as how to use scenario modeling to modify your results.

INVESTMENT MANAGEMENT

Spotlight on Investment Management

Join us for a fast-paced tour of the Investment Management Suite. See how its solutions create a comprehensive and versatile system for managing investors and an investment portfolio. The class includes the latest features and product updates for Investment Accounting, Investment Manager, Debt Manager and Performance Manager. We'll also take a look at Acquisition Manager, the newest product in the Investment Management Suite.

Acquisition Manager: Controlling the Deal Pipeline

Track and optimize your real estate acquisition process with a centralized deal management solution. Gain insights that drive informed decision-making and maximize ROI with a solution that streamlines the deal pipeline and promotes better outcomes.

Debt Manager: Setting up Loans as a Borrower

Experience transparency, automation and enhanced decision-making with Debt Manager. Our smart solution adapts to your specific needs, reduces manual errors and accelerates accounting tasks. Debt Manager for borrowers offers real-time reporting and insights, allowing users to track key performance indicators, manage loan terms and track covenants to ensure loans remain in compliance.

Debt Manager: Loan Portfolio Oversight

Unlock the secrets of effective debt management in this class. Whether your debt is an asset or liability, Debt Manager can help you effortlessly track loans, automate loan processing and generate essential reports for your entire loan portfolio.

Investment Accounting: Back Office Accounting for Funds & Syndications

This introductory class offers a high-level overview of automating complex accounting transactions in fund management, which enables more efficient processes for managing portfolios of all sizes. Topics include the fundamentals of setting up investment structures and managing commitments, as well as key sub-ledger processes and GL cash transaction rule configuration. The class also highlights using Investment Accounting analytics to view and analyze capital transactions, calculate essential metrics like unfunded equity and leverage out-of-the-box tools for enhanced financial insights.

Investment Accounting: Financial Consolidations & Reporting

This class covers producing consolidated financial statements above the property level. We will review ownership structures and related components. You will learn how to create consolidation entries with eliminations for the most common consolidation methods. The class also includes review of useful reports and best practices.

Investment Accounting: Management Fees & Partner Transfers

Building on the foundational concepts of Investment Accounting, this intermediate class provides a high-level overview of the solution's key functions, including tax withholding on investment distributions, complex investor management fee calculations (such as side letter agreements), partner transfers and the fundamentals of managing open-end funds or funds with unit/share tracking, NAV striking and ownership rebalancing.

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 Manager: Introduction to Investor Relations & Portal

Discover the seamless ability to convey essential details to investors and ensure transparency from investor engagement to asset operations through an intuitive and user-friendly Investor Portal navigation.

Performance: Attribution & Composite Returns

This class will build on the Performance class to 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. In addition to composite building for returns, we will cover displaying operational and financial KPIs and show how a user can drill down into other Elevate products.

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, TimeWeighted Returns, NCREIF and IPD returns. Additionally, we will discuss how to calculate IRRs and custom equity multiple, cash on cash, or other return metrics and KPIs.

MULTIFAMILY

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.

Asset IQ: Best Practices for Performance Management

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 optimize 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.

Data Connect for Multifamily: Custom Analytics in Power BI

Yardi Data Connect is our next generation customized BI offering. YDC is designed to leverage Microsoft Power BI technology. Learn about using its 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. This class will include both an overview of the product and some newer features.

Forecast IQ: Transforming the Budget Process

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 our smart home solution, RentCafe Home IQ, which works with the Yardi products you are already using by leveraging smart locks, thermostats and leak sensors to help you increase NOI, reduce risk and save time. Streamline maintenance and vacant unit management with digital keys and native smart home automations. This class will demonstrate the benefits of making your units smart and giving residents and staff simple and intuitive tools that make their lives easier.

Lease Renewals

This class will review the lease renewal process in Voyager 8 for both the basic and proposal/approval lease renewal processes. We will cover settings, our new renewals dashboard, the bulk proposals function, and selected and scheduled renewal statuses.

Move-Ins, Transfers & Roommate Promotion

This introductory class will review the basic move-in process. We will also cover how to complete unit transfers and the roommate promotion function in Voyager 8.

Move-Out & Deposit Accounting

This class will review the move-out and deposit accounting process in Voyager 8. 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 of 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 Reporting

This class covers all new residential reports in Voyager 8. It will show important reports for tracking resident activity and financial details such as rent roll and security deposit activity. We will also cover conversion ratios, unit availability, resident activity and traffic detail, along with the use of KPIs and residential reporting.

Residential Admin & Automation

This class will review standard tools that help reduce manual work for 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 topics will include automation through task, optional parameters and rent responsibility.

Residential Best Practices

In this class, we will review best practices for using the Residential module and cover data imports, property conversions, posting procedures and reporting options. We will also cover recommended routine tasks and optional parameters that can help improve operational efficiency.

Revenue IQ: Introduction

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 goals with enhanced dashboards and other dynamic features. Both current Revenue IQ clients and those interested in optimizing their revenue will benefit from this session.

Voyager 8 for Multifamily: Overview

Voyager 8 has arrived with significant updates to the Voyager 7S experience. This class will demonstrate the enhanced, easy-to-use interface for residential operations. We will review new streamlined dashboards, prospect and resident profiles, the use of SMS and email, lease generation and more. Voyager 8 has arrived and is positioned to help you navigate the future of infinite possibilities.

MARKETING, LEASING, CRM

Blue Moon: RentCafe Setup & Lease Execution

Join us as we review the enhanced Blue Moon V3 integration. This review will include a quick overview of the simplified implementation process and will showcase our seamless lease generation solution in action. Don't miss out!

Concierge IQ: Overview

Join us to learn more about Concierge IQ, the ultimate all-in-one front desk solution designed to elevate your property management experience. Effortlessly manage amenity reservations, package tracking, guest and visitor tracking, incident reporting and more from a single platform.

CRM IQ: Conventional Leasing Scenarios

This class is an overview of the CRM IQ new lease and renewal lease workflow from both the prospect/resident and property viewpoints. We'll cover how to create a lease proposal, approve the lease proposal, and how to sign and countersign the renewal lease.

CRM IQ: Product Overview & Implementation Basics

CRM IQ, Yardi's newest evolution in customer relationship management solutions, provides centralized communication management, seamless integration with RentCafe Conversations and an enhanced lead-to-customer management experience. Join this class for a look at CRM IQ and its various tools for streamlining everyday tasks as well as a high-level overview of our implementation process.

REACH by RentCafe: Marketing Strategies that Drive Results

Dive into marketing data with Marketing IQ Genius, our analytics and AI platform, to develop strategies and identify opportunities to reduce unnecessary marketing spend without compromising results.

RentCafe Chat IQ: Introduction & Roadmap

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 CRM Flex: Student Housing

This course provides an overview of the unique features of the Student module within Rent Cafe CRM Flex. Key topics include understanding academic terms, reviewing flex availability, utilizing bulk functionalities, differentiating between individual and joint and several leasing, and the role and workflow of student guarantors.

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 the implementation process.

RentCafe Suite: Resources & Troubleshooting Basics

See how to troubleshoot common issues while leveraging reporting with the RentCafe tool set. We will also answer some frequently asked questions and show you techniques to find the answers.

RentCafe: Advanced Marketing Features

Take this class to become a RentCafe marketing genius! Learn about conversion and engagement features within the RentCaffeine framework, such as interactive property maps, nudge marketing and featured floorplans.

RentCafe: Marketing Website Design & RentCaffeine Site Editor

This class is tailored to marketing managers aiming to establish a distinctive online presence with visual customizations aligned with their brand. Explore website transformations designed by the REACH team, review our latest themes and examine design trends in 2025. Learn how to utilize RentCaffeine's Site Editor tool to personalize the property website's default template, adjust layout structure, and incorporate branding colors, images, patterns and textures.

RentCafe: Optimizing the Applicant Experience

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

RentCafe: Resident Services

Learn about all the different ways a resident can interact with a property using RentCafe. We will also look at customizing the resident experience and improving resident retention.

ResidentShield Power

Learn more about Yardi's retail energy solutions and how ResidentShield Power is designed with properties and residents in mind. We'll cover easy sign-ups and reliable power exclusively built into the online application and resident portal that enhance the resident experience.

ResidentShield Renters Insurance

Learn how to reduce risk and gain peace of mind with a simplified renters insurance platform. This class will cover how Yardi can assist you in offering high quality coverage to residents within your existing leasing workflow.

Rewards by RentCafe

This class covers the Rewards by RentCafe program, which lets residents earn points to spend in the Rewards by RentCafe Marketplace. We also delve into how this program benefits property managers and operators and how the Rewards Call Center manages resident inquiries.

Student IQ: Innovation for Student Housing

Discover the updated user interface of our next generation Student Housing software, which enhances flexibility and usability for student operations. Explore the concept of Rental Space Types, understand how they differ from traditional space groupings and learn how your spaces can be redefined term after term, year after year.

AFFORDABLE

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 in-person YASCs that will provide more details. [All subsidy types]

HOTMA & Voyager Affordable

HOTMA final rule changes went into effect January 1, 2024. However, HUD has delayed their implementation for 50059 properties pending TRACS 203A specifications and the availability of site software. Voyager Affordable plug-in updates provide the flexibility to support LIHTC and HOME HOTMA implementations on a property-by-property basis. This class will discuss changes to Voyager that accommodate updated HOTMA requirements. [All subsidy types]

HUD 50059 Monthly Processing in Voyager 8 Compliance Manager

This session provides an overview of the monthly processing for completing a 50059 HAP voucher in Voyager 8 Compliance Manager. Join us to see how Compliance Manager has simplified the process. [50059]

RentCafe Affordable Housing: Applicant Move-In Experience & Processing

Do you want to improve the move-in experience for your prospects by allowing them to complete applications from anywhere? This session provides an overview of the RentCafe Affordable Housing online move-in experience from the applicant's point of view and demonstrates features designed to streamline and manage online applications. Learn how the RentCafe Affordable Housing move-in workflow can incorporate Yardi Verification Services and seamlessly tie into your Voyager software. [All subsidy types]

Voyager 8 Compliance Manager: Introduction

In Compliance Manager, we have integrated tasks from Voyager, RentCafe, and RightSource to simplify your onsite operations. Join us to see how Compliance Manager can help your team members streamline their daily activities. [All subsidy types]

PHA

Spotlight on PHA

Spotlight on PHA is your opportunity to participate in 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.

NSPIRE: Understanding the New Inspection Protocol for HCV

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

RentCafe PHA: New Features

Join this session to learn how new features in RentCafe can help reduce costs and increase efficiency at your PHA. Highlights include reasonable accommodation requests, rent increases and 1099s.

Tracking Requests with Case Manager

Case Manager is an exciting new ticketing system designed for PHA and Affordable clients. Dashboards and task-driven workflows allow insight into internal and external communications to track reasonable accommodation, requests for information, resident services and other activities. Integration with Voyager, RentCafe and Maintenance IQ enables improved relationships with clients and partners in the community.

MARKETS & SERVICES

Identification, ScreeningWorks Pro & Income Verification: Overview & Best Practices

In an era of growing applicant fraud, join us for a look into how Yardi is mitigating this risk with ID authentication, ScreeningWorksPro and income verification solutions.

Introduction to MH Manager for Manufactured Housing Providers

Join this product overview to learn how MH Manager can help you grow and manage your Manufactured Housing portfolio. Take advantage of all the functionality available in this powerful set of features including home inventory management, loan servicing, violation management and resident account management. We'll give you the "view from 10,000 feet" so you can see the benefits of adding MH Manager to your Voyager stack.

Introduction to Storage Manager

Join this product overview to learn how Storage Manager can help you manage your storage facilities with powerful dashboards, a calendar, a walk-in wizard, gates integrations, delinquency schedules and more. We'll give you the "view from 10,000 feet" so you can see the benefits of adding Storage Manager to your Voyager stack.

Introduction to StorageCafe

Learn about StorageCafe Marketing websites and how to advertise your facilities' unit pricing and availability. This class shows how StorageCafe creates a contactless, frictionless and paperless online storage rental experience. We step through the entire leasing process including ID verification, online storage unit rental, electronic lease signatures, autopay enrollment and automated move-ins. We'll also show how tenants can make online payments and submit service requests.

Single Family Homes Utilities & HOA Solutions

Learn how to reduce the time and effort needed to manage utilities and homeowners associations for your single family home portfolio. This class will cover Yardi's solution for paying utilities and recovering utility expenses from residents. We will also focus on managing HOA correspondence and governance documents, automating annual dues/violation payments and improving cost recovery.

Single Family Homes: Voyager Basics & Performance

This class covers the fundamentals of the Single Family Homes module, including its features, benefits and functionality. There will also be a high level focus on available Performance tools.

SENIOR LIVING

Spotlight on Senior Living

Join us as we spotlight the latest innovations in the Senior Living Suite of products — and share exciting changes planned for the future. We are always evolving our solutions to help you streamline operations and provide improved resident services, and this session will highlight the key new tools and features that support these goals.

Increasing Productivity with Free Senior Living Training Resources

This class outlines Senior Living's free training resources and shares ways to leverage them to increase user confidence and productivity.

Maximizing the Impact of EHR with Interoperability & Interfaces

Learn how Yardi EHR's advanced interface capabilities connect your communities to the broader healthcare ecosystem, optimize care delivery and resident outcomes, and enable value-based care.

Voyager 8: Senior CRM Overview & Migration Basics

Discover the advantages of our latest Senior CRM Update on Voyager 8. In this informative session we will dive into the exciting new features and powerful enhancements, and discover how upgrading can supercharge your organization's success. Plus, we will provide you with expert strategies to ensure a seamless and impactful transition!

Voyager 8: Senior Housing Overview & Migration Basics

The next generation of Senior Living Voyager is here and significantly updates the foundation of the Yardi platform. This class provides an overview of how this new user interface organizes its functions around resident handling, AR, AP, GL, reporting and much more. All of this packaged in an intuitive and simplified look and feel. Senior Voyager 8 has arrived and is positioned to help you navigate the future of infinite possibilities.