YARDI

Class Descriptions



San Diego

August 27-29

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!
#YASC2024

CORE FUNCTIONALITY

Accounting

★
Automating Voyager Management Fees
Join us for review of the Management Fee functionality and discover how to create commission payments directly in Voyager. We will explore setting up management fee pools, creating commission payments and posting 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. Not sure what to do or how to correct it? This class will teach you how to identify and correct errors in resident/tenant balances, as well as to 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 Transactions & GL Allocations
This class reviews the three primary options Voyager provides to allocate expenses to properties/entities: intercompany, cross-entity transactions and GL allocations. Intercompany is typically used when transactions need to be eliminated between a company and its subsidiaries. Cross-entity transactions are used for billbacks (cost allocation). GL allocations are used to allocate amounts from an account at a source property to the same account in one or more target properties. We will review the basics, when to use each option 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, as well as corresponding effects on the general ledger. Learn how to troubleshoot GPR tie-out issues to ensure accurate reporting of your financial position.

★
Voyager 8: Month-End Period Close Dashboard
Whether you're in accounting, property management or asset management — closing the month, quarter or year is a critical process in your business. It's vital to stay on task and on time. In this class we'll share new Voyager 8 functionality that keeps everyone in your organization in sync with visibility into upcoming tasks and assignments. With user-based workflows, assigned task lists, and connections to key reports and functions throughout Voyager 8, we'll show you how to effectively and efficiently stay on top of your close period process.

■
Voyager 8: 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 here to help you navigate the future of infinite possibilities.

★★★
Voyager Account Trees: Advanced Topics
Enhance your skills by learning how to set up more complicated account trees for more detailed financial statements. Understand how to alter the appearance and totaling of financial statements to accommodate an organization's unique reporting requirements.

★
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 Automatic Bank Reconciliation
This class will show how you can save time and improve accuracy with the automated functionality available in Voyager.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

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 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. You'll also learn how to export reports to PDF and Excel with the click of a button. We'll show you 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 Intercompany

Join this class to learn how intercompany functionality in Voyager tracks each relationship with a segment. We'll cover setting up Voyager 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 Segmented Accounting

Want to increase the amount of detail in your financial reports without adding GL accounts to your chart of accounts? 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 allows you to add significant new details to financial reports.

Reporting

★★★

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, along with many other advanced features. We'll discuss the database structure used by the program to populate the custom analytics and view some advanced template designs, including how to take advantage of YSR report templates for boardroom-quality reports. This class also includes tips and tricks for validating designs and correcting errors.

★★

Custom Financial Analytics: Intermediate

This class builds on the Custom Financial Analytics: Introduction session. It focuses on creating templates that use arithmetic formulas, attributes and performance data calculations. This action 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. We'll show you how setting user group security on your templates can help limit the templates available for reporting for specific user groups.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

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.

★

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.

★

Voyager 8 Reporting

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

★

Yardi Replicate

Yardi Replicate allows you to directly copy selected tables from the Voyager database to your desired end point such as Snowflake, Azure Data Lakes and local SQL instances. Any table in Voyager can be replicated, with data updated in real time. Take this class to learn how Replicate enables pure data replication without transformation. (Requires Private Cloud.)

★

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 follows up Part 1 and is suitable for those tasked with designing custom reporting solutions using Yardi Spreadsheet Reporting (YSR). Newer features are introduced, including a YSR admin menu set that centralizes many maintenance features useful to YSR report administrators. We'll contrast the classic setup and interface with the newer, slimmed-down interface. We'll also explore locking or hiding passed-in filter parameters from menu URLs and discuss a new activity monitoring report. If time permits, we'll explore echoing filter values and conditionally hiding columns along with formatting tips and YSR best practices.

Visit YASC San Diego for event details.

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Panel Discussions

⌘

Client Panel Discussion: Chat IQ Performance Measurement & ROI

Struggling to understand how to gauge the success of your bot? Join us for an exciting session that dives into Chat IQ trends, insights and firsthand, real-world success stories. Discover how your peers are successfully using Chat IQ to increase their community teams' value while improving leasing efficiency.

⌘

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.

⌘

Client Panel Discussion: Risk Management

With property liability insurance and renovation costs skyrocketing, an effective renters insurance program has become a critical element of a portfolio manager's focus. This panel will explore top risks, available solutions and effective strategies to increase adoption and generate additional revenue.

⌘

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. A client panel will address how they evaluated and successfully implemented solutions and continually review and improve usage. This class is valuable to both those considering adopting Yardi Elevate solutions and those looking for tips and tricks to get more from the tools already in place.

Peer Roundtable

●

Trainer's Roundtable

Do you use certifications? In this roundtable we will discuss certifications and how they can help employees in their career path and increase employee retention. This discussion will focus on four areas: topics, roadblocks and incentives, delivery methods, and planning and execution.

Technical

★

SQL Scripting Overview

Expand your knowledge of SQL queries and the Yardi database structure. This class will review basics of table relations in the Yardi environment and educate you on SQL select statements. This information can be helpful when troubleshooting data-related issues or identifying how certain data elements relate to each other in your system.

★

Virtuoso Assistant: Introduction

Virtuoso Assistant is here to help you with your day-to-day tasks in Voyager 8! Learn about this new artificial intelligence tool and what it has to offer. We'll cover what you can do with it today, our plans for the future and more.

★

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 contacts 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: Advanced Topics

Enhance your expertise in Voyager 8 security with this updated class! Explore the intricacies of setting up security in Voyager, including advanced security features, and customizing roles and managing access for Voyager 8.

★

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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

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.

★

Yardi Document Management for SharePoint: Overview

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.

★★

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

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

ANCILLARY MARKETS & SERVICES

Aspire

★

Aspire: Effective Learning Experiences for on-the-go Employees

Learning needs arise throughout the day, providing opportunities to engage your teams in continuous education. Employees are more successful when effective training is both easy to access and engaging. In this class, you'll learn how to capitalize on tools that enhance the learner experience and support learning on the go. See how to drive engagement with personalization, point rewards, achievement badges, reactions and testimonials. Discover how Aspire delivers the freedom to access live training events, learning plans, policies, training videos and more from its mobile learner app. We'll also show how integrations provide instant access to training conveniently embedded in the Yardi software you use every day.

■

Aspire: Transforming the Future of Learning for Property Management Organizations

Step into the future of learning with Yardi Aspire! Join us to explore how Aspire revolutionizes training initiatives, maximizes workforce potential and reshapes how property management organizations thrive in today's competitive landscape. From automating personalized learning plan delivery to managing compliance training and leveraging advanced analytics, Aspire empowers organizations to streamline training and policy management, elevate employee skills, ensure regulatory compliance and drive operational excellence. Don't miss this exciting opportunity to provide seamless and centralized access to the industry's largest catalog of market-specific learning and development resources.

Visit YASC San Diego for event details.

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★

Beyond Scheduling: Expanding the Reach of Live Training Classes with Aspire

Whether your team attends in person, online or in a hybrid session, live training builds connections, allows for instant feedback and increases engagement. With Aspire's comprehensive event management tools, you can accomplish much more than just managing registrations, sending calendar invites and tracking attendance. This class will show how Aspire can help you market your live training with QR codes, training announcements and bulk communications; host pre- and post-training activities, such as prerequisite courses, surveys, chat group activities and more; and distribute slides and training recordings after the event. Let Aspire handle all attendance tracking and post-survey deployment automatically. Learn how to take your live training to a whole new level, engaging your staff and reaping the benefits of multiple touch points surrounding impactful events.

★★

Centralizing Policy Management: Mobile Access, Creation & Automation in Aspire

Company policies help set clear expectations, reduce risk and create consistency across your organization. Learn how Aspire can help you manage a library of documents, create trackable assignments, manage document changes and gather signature acknowledgements. See how Aspire expands policy management beyond document management by helping employees stay compliant and confident in their role, with a complete audit trail and full reporting capabilities.

★★

Closing the Gap Between Career Advancement & Training with Aspire

Investing in employee training isn't just about filling skill gaps — it's about building bridges to advancement and unlocking the full potential of your workforce. In this session, we'll show how Aspire can equip you with the tools and strategies to support skill development and career mobility. You'll learn how to build a pipeline of qualified talent by marketing career opportunities, recommending training to build skills needed for organizational success and leveraging robust reporting.

★

Crafting Impactful Content with Aspire Authoring Tools

Are you looking for training that aligns with the needs of your employees and the organization? Join this class to see how to build custom training, learning plans, events, resources, announcements and more with Aspire's comprehensive suite of authoring tools. Learn how to tackle specific learning needs with focused training that improves productivity and maximizes your training ROI. Aspire's content design experts will show how to create engaging content, starting with functionality that converts PowerPoint and Word documents into courses. Other topics include pre-built layout templates, challenging interactions, fun animations and effective assessments.

★★

Effortless Onboarding: Automating Personalized Learning Plans with Aspire

An often overlooked aspect of employee management is onboarding. Employees are much more likely to stay with an organization that has a good onboarding process. Join us to discover how to curate personalized, company- and role-specific onboarding workflows that leave you more time to make the personal connections that matter. Save time by customizing templates from Aspire's library and adding HR documents and forms, surveys, check-in emails, orientation meetings, tasks, policies, surveys and recognition. See how you you can equip supervisors with compliance and activity dashboards along with reports on employee progress. Get insight into keeping your new employees learning and growing by configuring timely, next-level training that keeps employees engaged in development throughout their career. Aspire is here to help you cultivate your property management "Dream Team."

Visit YASC San Diego for event details.

This class list is subject to change at any time.

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 for ensuring proper allocation of payments and significantly reducing late fees and disconnects.

★★

ESG Sustainability Reporting & Benchmarking

Join this class to see how Yardi can help you attain 100% whole building data coverage for ESG energy, water and waste reporting. Learn tips for complying and certifying your buildings to meet ENERGY STAR® benchmarking requirements. We'll also demonstrate our new GRESB reporting product offering.

■

ResidentShield Power

Learn more about Yardi's retail energy services and how ResidentShield Power is designed with properties and residents in mind. Join this class to see how ResidentShield Power can supply electricity to properties in Texas and improve residents' move-in experience by making it easy for them to sign up for electricity.

★

Single Family Homes Utilities & HOA Solutions

Take this class to see how the Yardi Energy Suite manages utility and homeowner association payments and reimbursements. The Yardi Energy Suite is an automated, end-to-end utility management system with no interfaces to third-party systems. Learn how Yardi can reduce time and effort needed to manage utilities and homeowner associations for single family homes. Gain insight into managing governance documents, automating annual dues/violation payments and improving cost recovery.

■

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 master 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.

★★

Yardi Pulse Dashboard: Manage Utility Spend, Usage & Emissions

Join this class to learn how the Yardi Pulse dashboard can help organizations manage utility cost and consumption. From detailed reports and automatic calculation of GHG emissions for ESG reporting to actionable alerts, the Pulse dashboard can help you identify areas to reduce utility spend and improve NOI.

Maintenance

■

Facility Manager for Commercial: Overview

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

★★

Facility Manager: Commercial Inspections

Join this class to discover tools for creating and executing inspections effectively. Gain insight into the straightforward 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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

Facility Manager: Mobile App

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 routines. 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: Preventive Maintenance & Equipment

Join this class to explore the comprehensive tools Facility Manager provides for creating and overseeing preventive maintenance plans for equipment across a portfolio. Discover a template-based system that simplifies the configuration of equipment and tasks, ensuring a uniform portfolio-wide preventive maintenance program. Discover how your tenants can upload proof of work for tenant-responsible equipment with CommercialCafe.

★★

Facility Manager: Work Orders

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 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: Introduction

Join this class to learn how to execute the fixed asset lifecycle in Fixed Asset Manager. Discover the tools for creating new assets, the various methods for calculating depreciation and key transactions in the Fixed Asset lifecycle. By the end of the class, you'll possess the expertise needed to effectively manage your organization's fixed assets, optimizing financial performance and strategic decision-making.

★★

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/Advanced Features

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

★

Maintenance IQ for Multifamily: Work Orders

Join us as we show you how to gain real-time visibility into your 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, 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: Overview

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 Yardi Payment Processing.

★★

Resident Online Payment Experience

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

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

Voyager 8: Accounts Receivable

Attend this class as we dive into Payment Processing in the AR Manager platform. We will demonstrate new features as well as show how to manage all your 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!

Procure to Pay

■

Bill Pay Express: 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: 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 as we cover how Bill Pay can manage accounts payable activity in one convenient location. Learn how to navigate between 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 achieve operational efficiencies and centralize approvals, processing and reporting.

★★★

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.

★

Bill Pay: Rapid Refunds for Residents

Learn how Bill Pay Rapid Refunds provides a real-time debit card payment option for your residents — at no cost to you.

★★★

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: Marketplace Introduction

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: Overview

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!

Visit YASC San Diego for event details.

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■

Procure to Pay: P2P Services Overview (Service Contracts)

This class provides an overview of Procure to Pay with emphasis on procurement, invoice processing, approvals and payments. The suite's PayScan element 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: 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.

★★

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: Overview

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. 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.

★★

Commercial Automated Cash Application

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.

★

CommercialCafe Tenant Portal: Intro to Advanced Features

Learn about advanced features and processes in CommercialCafe Tenant Portal including multi-lease payment options, automated tenant invitations and new integrations with Facility Manager for preventive maintenance and inspections. This class will also highlight new features and what's coming.

■

CommercialCafe Tenant Portal: Employee Experience

Looking to improve the experience of your tenants and their employees? Join this class to learn about CommercialCafe Employee Experience, 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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

■

CommercialCafe Tenant Portal: Overview

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.

■

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: 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.

■

Deal Manager: Overview

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 providing enhanced 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).

★

Retail Solutions: Intro & Advanced Topics

Join this class to learn how the Voyager percentage rent toolset helps users enter sales data and accurately process percentage rent calculations. This class will cover retail sales and percentage rent setup at the system, property and lease levels. The instructor will review calculations, some complex scenarios and reporting using our intuitive toolset and straightforward percentage rent function.

■

TenantShield: Tenant COI Management Overview

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

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

Voyager 8: Commercial Lease Admin & Tenant Management

This class will explore the features and benefits of Voyager 8 Commercial, 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.

★

Voyager 8: Commercial 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 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.

★★

Voyager Commercial Best Practices

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.

★★★

Voyager Commercial Recoveries: Advanced Features

Join this class to explore features that help resolve complex recovery scenarios. Part A will include an overview of the audit report, report adjustments, expense adjustments, recovery estimates (related reports) and recovery accruals. Part B will include standard segmented recoveries, advanced recoveries (formally cost distribution), management fee by charge code and retail/anchor recoveries.

★

Voyager Commercial Recoveries: Introduction

Join this class to learn how the Voyager recovery toolset helps users accurately process tenant recoveries. This class will cover setups at the standard system, property and lease levels, along with calculation and supporting reports utilizing our intuitive toolset.

★

Voyager: 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. Attendees will walk away familiar with the setup fundamentals necessary to fully utilize system features.

★

Yardi Data Connect for Power BI: Commercial Introduction

Yardi Data Connect is our next generation customized BI offering and is designed to leverage Microsoft Power BI technology. Learn how the product's secure API streams data from one or more Voyager databases into your Azure environment. See how to combine Yardi Data Connect 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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

■

Yardi Data Connect for Power BI: Commercial Overview

Yardi Data Connect is our next generation customized BI offering designed to leverage Microsoft Power BI technology. Learn how the product's secure API streams 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.

Construction

★★★

Construction: Advanced Topics

This class will cover a variety of topics for advanced Construction users including CM fees, document generation and signing, and retention processing.

★

Construction: Basics

This class will provide a high-level tour of Construction functionality. Expect an emphasis on the module's building blocks, general feature overviews and best practices.

★★

Construction: Draws & Receivables

This class covers the construction draw and accounts receivable processes. 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 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, Forecast IQ and Valuation Manager.

■

Construction Manager for Commercial: Overview

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

★

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 construction data in a simple 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, assessing risk, 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.

★★

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 see those newly created jobs reflected in your property budgets.

●

Roundtable: Construction

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 and budget oversight, 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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

Forecasting

★★

Advanced Budgeting & Forecasting: Reforecasting & Advanced Features

This class will review 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. We will also touch on how some of these reforecasting steps can now be run directly in Forecast Manager. Come see how we can help make your reforecasting process smooth and efficient!

■

Forecast Manager for Commercial: Overview

Part of 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 them 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 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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

Roundtable: Forecasting

Interested in learning about recent enhancements, upcoming development and future roadmap for our budgeting and forecasting products? Join us for this roundtable presentation, which will encompass Forecast Manager and Valuation Manager.

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 take the black box out of valuations.

INVESTMENT MANAGEMENT

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, Performance Manager, Investment Accounting and our latest product, Acquisition Manager.

Acquisition Manager: New Product Overview

Tired of juggling multiple spreadsheets and manually tracking investment acquisition data? Look no further than Acquisition Manager, the latest addition to the Investment Management Suite. This powerful tool serves as a centralized hub for accessing, analyzing and managing potential investment acquisitions. Key features include centralized access to data for all team members, efficient analysis of deals in your pipeline, simplified workflows and task management to keep team members focused on important and time sensitive tasks, and document collection.

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

As a borrower of debt on your investments, your daunting tasks include managing loan terms, amortization schedules, payable processing for loan payments, loan covenants, reporting and complex calculations. 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: Capital Tracking for Funds & Syndications

Automate the complex accounting transactions of fund management to dramatically reduce the analysis required by traditional accounting. This class will show how Investment Accounting lets you 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 subledger transaction types, GL cash tran rules, capital calls, distributions, income/MV/NAV allocations and reporting.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

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-of-the-box analytics that utilize templates to calculate IRRs, unfunded equity, market value and other metrics.

★★★

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 end fund vehicle.

★★

Investment Accounting: Tax Withholding, Management Fees & Partner Transfers

This class follows up the Introduction to Investment Accounting: Capital Tracking for Funds & Syndications session, diving into tax withholding on investment distributions, complex investor management fee calculations (including side letter agreements) and partner transfers.

★

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.

★

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: Investor Relations & Portal Overview

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.

★★

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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

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.

RESIDENTIAL

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 in 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 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.

★

Conventional Resident Management Scenarios

Review the tenant lifecycle events including move-in, transfers, roommate promotion, notices, move-out and deposit accounting. The effect on occupancy and GL transactions will be included, as well as 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).

■

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, Fannie Mae Reporting, 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 four products and how they work seamlessly together.

★

Forecast IQ for Multifamily: 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

Curious about Yardi's smart home solution? Join us to explore RentCafe Home IQ, Yardi's purpose-built smart home solution natively integrated with the Yardi ecosystem. Smart locks, access points, thermostats, leak sensors and other IoT devices increase revenue and resident retention by delivering the technology experiences that residents want without adding third-party integrations and additional apps. Offer residents and site staff simple and intuitive tools for managing their smart home connected units. 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 letters, the month-to-month process, reporting and permissions.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

Residential Admin & Automation

This class will review utilizing standard tools in Yardi to help reduce manual work for your help desk and site teams. Voyager provides several tools to minimize manual work. Residential Write-Offs utilizes system defined charge code mappings to simplify write-offs. The Residential Toolbox lets you undo items such as Deposit Accounting and Promote Roommate without reaching out to Yardi. Other tools to be discussed 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

In this class, we will discuss ways to optimize performance with diagnostic tools and recommend best practices for Voyager Residential. We will also review the different approaches to onboarding a property, posting routines, and executing core tasks and reports.

★★★

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. This class 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

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.

■

Revenue IQ: Overview

Let us show how you can optimize rental income and improve occupancy with Yardi's revenue management system. Clients using Revenue IQ benefit from an intuitive trends and rules based system, which allows clients to align pricing with a property's broader asset goals. This session will spotlight a solution that optimizes revenue with better results, enhanced service and complete visibility. Clients interested in an initial overview of Yardi's revenue management offering 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, including SMS and email, lease generation and more. Voyager 8 has arrived and is positioned to help you navigate the future of infinite possibilities.

★★

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 maintain current and historical trial balances.

★★

Yardi Data Connect for Power BI: Multifamily Introduction

Yardi Data Connect is our next generation customized BI offering and is designed to leverage Microsoft Power BI technology. This class is appropriate for existing clients wanting to increase their knowledge on topics such as best practices for customization and upgrading starter pack versions. While the class is structured for existing clients, prospective clients who are eager to see the details about Yardi Data Connect are welcome to join as well.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

■

Yardi Data Connect for Power BI: Multifamily Overview

Yardi Data Connect is our next generation customized BI offering and is designed to leverage Microsoft Power BI technology. Learn how the product's secure API streams data from one or more Voyager databases into your Azure environment. See how to combine it 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

★★

Blue Moon: RentCafe Setup & Lease Execution

Blue Moon seamlessly integrates with RentCafe, allowing you to manage your Blue Moon leases directly from RentCafe Site Manager, CRM Flex and CRM IQ. This class focuses on the latest Blue Moon features that are available for RentCafe Site Manager, CRM Flex and CRM IQ, and includes some best practices for your Blue Moon configurations.

★

Concierge IQ: Overview

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

★

CRM IQ: Conventional Leasing Scenarios

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 multiple leasing scenarios including adding a roommate, transferring a unit, utilizing global search functionality and more.

★

CRM IQ: Product Overview & Implementation Basics

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 everyday tasks.

★★

Marketing IQ: Focus on Financial Results

See the latest Genius edition and learn how AI and machine learning can power your marketing strategy. From content generation and pay-per-click budget recommendations to defining the optimal marketing mix, Marketing IQ Genius edition offers a powerful marketing platform to take your marketing game to the next level.

★★

REACH by RentCafe: Marketing Strategies that Drive Results

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 enhance your PPC efforts.

■

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.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

REACH by RentCafe: 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.

★

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: Conventional Leasing Scenarios

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 the required settings and workflows for move-ins, transfers and roommate promotions.

■

RentCafe Lease Docs: Overview

RentCafe offers a comprehensive library of lease documents that provide access to industry-standard forms specific to your property's location. This introductory class covers key features, system requirements and more.

★★★

RentCafe Student Housing: Advanced

Join us for a dive into more advanced features available in RentCafe CRM Flex Student Housing, including updates on where the product is headed. Topics include bulk space assignment, the Move-In Readiness dashboard and student tiered renewals.

★

RentCafe Student Housing: Basics

This class is an introduction to RentCafe CRM Flex Student Housing and its unique functionality. Topics include academic terms, flex availability, bulk functionalities, individual versus joint and several leasing, and student guarantors.

★

RentCafe Suite: 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 Suite: Streamlining Contact to Contract

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.

★★★

RentCafe: Advanced Marketing Features

It's time for a boost! RentCafe has an awesome feature set, especially when it comes to marketing functionality. Discover the latest trends in the marketing industry, and learn how to leverage the RentCafe platform to enhance your marketing strategies and goals.

★

RentCafe: Marketing Website Design & RentCaffeine Site Editor

Learn how to take the visual appeal of your website into your own hands. See how simple features and branding techniques can boost your property's online presence. We'll explore creative ways to engage your target audience, elevate your website's visual appeal and capture a larger audience using intuitive RentCafe functionality.

★

RentCafe: New Features

Level up your product knowledge and know-how. RentCafe regularly enhances its feature set, and if you take this class, you'll get up to speed on the latest and greatest. Join us as we review the most recent additions to the RentCafe suite of products. We'll also discuss roadmap items and explore the future of RentCafe!

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

RentCafe: Optimizing the Applicant Experience

Learn how to make the online application process more intuitive and easier to navigate. We'll explore admin configurations that enhance leasing workflows, and we'll discuss how RentCafe can seamlessly integrate local regulations and ordinances directly into the applicant workflow.

★

RentCafe: Resident Services

Join us to learn about the various ways a resident can interact with a property using RentCafe. We'll discuss the different ways to customize the resident experience and how to improve resident retention. We will also demonstrate how Concierge integrates with the Resident Portal.

■

RentCafe: Rewards Program

The RentCafe Rewards Program offers a no-cost rewards system for residents within the RentCafe network. By opting in, residents can earn points by purchasing ResidentShield products and when making rent payments. These points can be redeemed for travel bookings, experiences and purchases from various retailers.

●

Roundtable: Concierge IQ

Join us to discuss upcoming enhancements to the Concierge IQ module. We encourage you to bring your needs and ideas for future Concierge IQ upgrades!

Other Residential

■

Demonstration of Storage Manager for Storage Operators

Join this sales demo to learn how Yardi Storage Manager will help you grow and manage your self storage 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 Yardi Storage Manager to your Voyager stack.

★★

ID, ScreeningWorks Pro & Income Verification: Best Practices

This class covers best practices in deterring potential fraudsters via the Yardi ID and Income Verification solutions along with an overview of industry trends, analytics and current considerations from a screening perspective.

■

ID, ScreeningWorks Pro & Income Verification: Introduction

Learn about ID Verification, screening models and our approach in the online world.

■

Introduction to MH Manager for Manufactured Housing Providers

Join this demo to learn how MH Manager will help you grow and manage your Manufactured Housing portfolio with its power set of features. We'll give you the "view from 10,000 feet" so you can see the benefits of adding MH Manager to your Voyager stack.

★

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.

★

Single Family Homes: Basics

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

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★ Single Family Homes: Performance Best Practices

This class will review the most recent optimizations completed for Single Family Homes and large portfolios including bulk posting and rebuild functions as well as monthly tasks and posting routines.

★ The Basics of Storage Manager Operations

Take a more in-depth view of the Storage Manager workflows and learn how Storage Manager can help you manage your storage facilities.

★ The Basics of the Manufactured Housing Manager Workflow

Take an in-depth view of the MH Manager workflows and learn how MH Manager can help you manage your manufactured home communities.

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 other affordable housing classes scheduled this week. [All Subsidy Types]

★ 50059 Special Claims Functionality & Reports

Special Claims can be an untapped source of revenue for a property. This session provides information about using Voyager's Special Claims features to ensure that you are requesting and receiving all available HUD Special Claims funds for your properties. [50059]

★★★ Affordable GPR: Report, Journal Entry & Reconciliation

This session is for advanced Voyager Affordable Housing users whose goal is to understand property performance through the analysis of gross potential rent (GPR) for affordable housing properties. We will examine GPR report specifications, the GPR Journal entry process and the month-end accounts receivable reconciliation process. [All Subsidy Types]

★★ Affordable Housing Best Practices: Compliance Reports & Tools

Affordable housing presents many challenges that market-rate properties do not encounter. It's important that site and compliance staff know and follow proper processes to assure compliance and efficiency in property operations. This session expands on information provided in the first hour to help your staff efficiently and fairly maintain affordable housing program compliance. We will continue our discussion of compliance resources available from the Voyager dashboard. (Part 2 of 2) [All Subsidy Types]

★★ Affordable Housing Best Practices: Dashboard Tools

Affordable housing presents many challenges that market-rate properties do not encounter. It's important that site and compliance staff know and follow proper processes to assure compliance and efficiency in property operations. This session provides information to help your staff efficiently and fairly maintain affordable housing program compliance. We will showcase compliance resources available from the Voyager dashboard. (Part 1 of 2) [All Subsidy Types]

★ Affordable Housing Compliance Manager: Introduction

Compliance Manager integrates tasks from Voyager, RentCafe and RightSource to simplify onsite operations. Join us to see how Compliance Manager can help your team streamline daily activities.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

Affordable Unit Transfers & Rent Changes

Rent changes can be complicated in Affordable. Handling them across subsidy programs is even more challenging. The new Affordable Rent Change function applies to all Affordable program types (50059, Rural Development, Tax Credit, HOME and Local Programs). It is designed to handle layered subsidies and guide users through the process so that all program requirements are met. This class will also cover the new affordable housing unit transfer procedure. Join this session to learn how to use this valuable tool. [All Subsidy Types]

★★

Converting from TRACS 202D to TRACS 203A

With the impending change from TRACS 202D to TRACS 203A, Voyager Affordable 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 went into effect January 1, 2024 and affect all federal low-income housing programs. This class will discuss changes to Voyager to accommodate the 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. [50059]

★★

HUD 50059 Voucher Reconciliation

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

★

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 for Affordable Housing

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 verifications directly into RentCafe Affordable Housing. [All Subsidy Types]

★★

LIHTC Average Income Test

To strengthen and increase availability of the LIHTC (Low-Income Housing Tax Credit) program, 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. Recent changes in AIT will permit greater flexibility while keeping the property in compliance and dealing with the loss of one or more LIHTC units. This change will also facilitate rents from higher income units. Join this class to see how these changes will allow the LIHTC program to have a positive impact on more households and help improve property performance. [Tax Credit]

★

Local Programs: Introduction

Managing multiple compliance programs on a property can be challenging, especially when state, city and local programs are added to the mix. This session will explore how to manage an unlimited number of compliance programs with various rules as well as differing income and rent limits. Learn how to set up and administer local programs including establishing income and rent limits on a program-by-program or unit-by-unit basis. [Local Programs]

★

Navigating the Modern Fair Housing Landscape: Essential Insights & Strategies

Join us for an informative session dedicated to Fair Housing, where industry experts will discuss updates on changes and regulations affecting Fair Housing compliance in 2024.

Gain valuable insights and tips on management practices to meet compliance standards, while also learning from recent real-world examples that illustrate Fair Housing risks in compliance auditing. Take this opportunity to acquire practical knowledge, learn from industry leaders and stay current with regulations governing Fair Housing compliance. [All Subsidy Types]

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

RentCafe Affordable Housing: Applicant Move-In Experience & Processing

Do you want to automate your move-in applications by allowing prospects to complete applications from anywhere at any time? 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]

★

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

In this session, you will learn about the newest RentCafe Affordable Housing features available to your applicants, residents, property managers and compliance team. This class will include document stacking, application corrections and other features to assist your team in more effectively using RentCafe Affordable Housing. [All Subsidy Types]

★

RentCafe Affordable Housing: Resident Recertification Experience & Processing

Do you want to automate your annual recertifications by allowing residents to recertify digitally from anywhere on their own schedule? In this session we will demonstrate sending verification letters and completing the annual recertification from the resident's point of view. We will show you the process for confirming and updating resident information in Site Manager, then comparing it to previous certification information. We will demonstrate how to send verification letters or use Yardi Verification Services to verify income and assets prior to sending completed certification and verification data to Voyager to finalize the recertification process. [All Subsidy Types]

★★

RentCafe Affordable Housing: Site Administration Tools

RentCafe Affordable Housing can help streamline the applicant-to-occupancy process as well as recertifications of assisted households. In this class you will learn about best practices and tools your 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. We will also be covering methods available for site staff to communicate with auditors and gain a clearer vision of the path to full compliance. [All Subsidy Types]

★★

Repayment Agreements, Part 1

TRACS 203A brings many changes to how repayment agreements are handled for Section 8 properties. The timing and reporting requirements of repayment agreements have been updated and the move to TRACS 203A will require a baseline submission of all repayment agreements on the first 203A HAP Voucher. This session reviews the steps required to begin successfully using Voyager Repayment Agreements. We will also discuss how to prepare for the changes TRACS 203A will impose. We will discuss the general setup required to start using Repayment Agreements, along with reporting and the processing of repayments from residents. (Part 1 of 2) [50059]

★★

Repayment Agreements, Part 2: Workflow

This session reviews repayment agreement procedures in Voyager for current residents. TRACS 203A 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]

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★

RightSource: Compliance Services Introduction

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

●

Roundtable: Affordable Housing

Join us for an engaging and insightful Compliance roundtable, where key experts and stakeholders converge to address hot topics in affordable housing. The discussion is intended to foster a collaborative dialogue that explores innovative and practical solutions to pressing concerns in today's affordable housing landscape. We will delve into a range of topics, including the latest trends in housing compliance and policies, questions on HOTMA and information regarding TRACS 203A. Hear from a panel of distinguished speakers who bring a wealth of experience and perspectives. [All Subsidy Types]

●

Roundtable: Effectively Adapting to Change

Join us for a dynamic roundtable discussion focused on the ways that the RightSource Client Services team helps clients effectively adapt to change, and how to best leverage the resources available. This session will explore the resources available to manage the changes to compliance processes, tactics for identifying and planning for resistance to change, and how to maximize partnership with RightSource compliance services to achieve organizational goals.

Gain insights and share experiences with peers to streamline your processes and achieve superior compliance outcomes. This knowledge will be instrumental in optimizing your own processes and driving your organization's success. [All Subsidy Types]

●

Roundtable: RentCafe Affordable Housing

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]

★★

Rural Development Monthly Procedures

Managing Rural Development properties can be challenging. This class is designed to help with the process and demonstrate some best practices. We will discuss reporting and reviewing the MINC Project worksheet, MINC reporting and management fees. We will also demonstrate the new Voyager Rural Development Management Fee calculation and posting feature. This calculator workflow is intended to increase accuracy and efficiency in the calculations of monthly per-occupied door management fees. [Rural Development]

★

TRACS 203A: Compliance Changes

This session will cover the major differences between TRACS 202D and the upcoming release of TRACS 203A, as well as how to comply with the new requirements. Participants will walk away from this session with the compliance knowledge needed to successfully submit vouchers when a contract administrator is ready to accept 203A transmissions. [50059]

Visit YASC San Diego for event details.

This class list is subject to change at any time.

PHA

★ **Spotlight on PHA**
This class provides a high level overview of the changes, new features, products and services that impact Yardi PHA. Learn about Yardi's response to HUD changes and our development roadmap.

★ **Executive Dashboards with Asset IQ**
Asset IQ for PHA provides dashboards for managing key PHA activities. Designed to give executive staff an overview of PHA operations, productivity and actionable information, this product will give your leadership team the information needed to make data-driven decisions.

★ **HOTMA: All About Interims**
This class describes Yardi's best practices for managing interims, including online reporting changes, messaging to families, appropriate use of interims and non-income 50058s.

★ **HOTMA: PHA Highlights**
Housing Opportunities Through Modernization Act (HOTMA) regulations will impact all PHAs in the United States. This class describes 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.

★ **Introduction to Verification Services for PHA**
Yardi Verification Services is the newest addition to the Yardi PHA Suite. Available for Voyager clients, Yardi Verification Services enables site staff to quickly request and receive critical income and asset verification directly into Voyager or RentCafe PHA.

★★ **Maintenance & Inspection IQ for PHA**
This class includes an overview of new Housing Choice Voucher routing tools and a review of Vacant Turn dashboards that can help you 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.

★★★ **Moving to Work Options Explained, Part I**
This class describes how Yardi's Moving to Work options can be leveraged for Moving to Work agencies. Topics include rent and escrow calculations, recertification schedules and term limits.

★★★ **Moving to Work Options Explained, Part 2**
This class describes how Yardi's Moving to Work options can be leveraged for Moving to Work agencies. Topics include rent and escrow calculations, recertification schedules and term limits.

★ **Navigating the New 50058**
HUD is introducing three new 50058 forms with new fields, action types and rules. This class reviews the 50058 form changes that are part of HOTMA implementation and how your agency can best prepare for those changes.

★★ **NSPIRE: Housing Choice Voucher Implementation, Part I**
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). This class describes integration of the NSPIRE protocol, suggested scoring, best practices for communicating with landlords and Yardi's future plans.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

NSPIRE: Housing Choice Voucher Implementation, Part 2

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). This class describes integration of the NSPIRE protocol, suggested scoring, best practices for communicating with landlords and Yardi's future plans.

★

Online Briefing, RFTA & HAP Contracts

This class will focus on the 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.

★★

Optimize FSS Program Use

This session describes the latest changes in the Family Self Sufficiency program and provides an overview of managing 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 you monitor and manage exception cases. This class reviews the purpose of many of these reports, the details to look for, and an understanding of how to use the reports to track exceptions and ensure better overall operations. Where appropriate, we will describe the process of correcting the underlying data.

★

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 communication with participants.

★

PHA Unit Transfers

Learn the ins and outs of unit transfers in the PHA system. This session will discuss inter-property and intra-property transfers for all program types.

●

Roundtable: PHA Planning for HOTMA

Join thought leaders in discussing how to prepare tenants, landlords and staff for upcoming HOTMA changes.

★

Understanding Moving to Work (MTW) Basics

Moving to Work is a HUD demonstration program that allows agencies to modify compliance rules. Learn how Yardi can help you manage Moving to Work and Moving to Work Expansion 50058s.

★

Voyager 8: Compliance Manager

Learn about the future of Voyager PHA. We will demonstrate the next generation of Voyager for housing specialists and property managers, including new dashboards and workflows.

★★

Waiting List Management: Best Practices

This class explains how to use the RentCafe PHA and Voyager lottery options to open and maintain a large Housing Choice Voucher waiting list. We will also review industry best practices.

★

Yardi Case Manager: Tracking Requests & Services

Case Manager is an exciting new ticketing system designed for PHA and Affordable clients. Dashboards and task-driven cases provide insight into internal and external communications for tracking reasonable accommodation, requests for information and other activities. Integration with Voyager provides seamless visibility that can improve relationships with clients and community partners.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

SENIOR LIVING

Management

★ **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 Living: Adding Communities & Supporting a Growing Organization**
Join us as we review the benefits of submitting claims electronically with Claims Manager. This class will review how to set up, generate and maintain claim data. We will also cover new features added for Medicaid in Voyager and Claims Manager to assist users in processing Medicaid transactions and generating claim data.

★★ **Senior Living: Claims Manager Best Practices & New Features**
Join us as we cover Senior IQ new features and new dashboards from the past year including EHR, eMAR, Medicaid, eLeasing, Speed to Lead and Stand Up.

★ **Senior IQ: New Features**
Join us as we cover Senior IQ new features and new dashboards from the past year including EHR, eMAR, Medicaid, eLeasing, Speed to Lead and Stand Up dashboards.

★★ **Senior IQ: Next Steps to Success**
Take Senior IQ to the next level within your organization by hearing how other operators are using Senior IQ within their organizations, including dashboards and user groups.

★ **Senior Living: Voyager 8 Next-Generation Features**
The next generation of Voyager Senior Housing is here and significantly updates the platform's foundation. This class summarizes how this new user interface organizes its functions around resident handling, AR, AP, GL, reporting and much more, all packaged in an intuitive and simplified look and feel.

★★ **Senior Living: Best Practices for Voyager 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 demonstrate some of the newest features in our latest Voyager Senior Housing releases including clinical move-outs, excluded unit functionality and entrance fee enhancements.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

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. Learn 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 a 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 IQ: Advancements in Communication

Senior CRM IQ's Communication Hub is the new way to communicate with your prospects from one convenient location. All calls, texts and emails are recorded, transcribed and logged in a prospect's profile. Senior CRM IQ now also leverages RentCafe Campaigns for email and text blasts that have full reporting capabilities for success rates. Join us as we explore all the advancements in Senior CRM IQ.

★★★

Senior CRM IQ: Electronically Signing Documents & eLeasing

Senior CRM IQ has streamlined ancillary document and leasing workflows by enhancing process efficiencies. In this class, learn how to use Senior CRM IQ to create a seamless and paperless digitial signing experience for today's prospects.

★★

Senior CRM IQ: Lead Stage Prospect Journey

Hot, Warm and Cold are out. Learn about lead stages in Senior CRM IQ and how the setup and workflow reduce clicks for your sales team while guiding them through the sales process and prompting next-step action items.

★★

Senior CRM IQ: Migrating & Optimizing Your Setup

Learn how to make the sales process in Senior CRM IQ more intuitive and easier to navigate. This class covers the migration steps from Voyager Plus to Senior CRM IQ and how to set up Senior CRM IQ to enhance the sales process.

★

Senior CRM IQ: New Features

Explore the abundance of new features added to Senior CRM IQ 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 IQ: Product Roadmap & Focus Group

Exciting changes are on the horizon for Senior CRM IQ! This session will share innovations that 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 Senior CRM IQ.

★★

Senior CRM IQ: Using Analytics to Drive Success

Senior CRM IQ is packed with enhanced reports that come with built-in analytic dashboards. This class will review the most popular reports and analytical features in Senior CRM IQ.

EHR

★★★

EHR & eMAR Interoperability: Replacing Paper with Digital Workflows

This class provides an overview of interface capabilities and optimized workflows for Yardi EHR and Yardi eMAR to replace paper-based manual processes. We'll discuss how Yardi partners with Kno2 to replace analog fax, enable broad connectivity with health systems and support value-based care. The class also covers a variety of other connected health solution workflows that save staff time and improve accuracy.

Visit YASC San Diego for event details.

This class list is subject to change at any time.

★★

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

Learn about Yardi eMAR and its many available options. This session will cover a basic overview of eMAR including the eMAR dashboard, KPIs, order management and charting; as well as information on advanced eMAR topics of barcode scanning, quantity tracking, observation instructions, order libraries and pharmacy interface options.

★

EHR New Features

Join us as we highlight exciting new features included in the EHR 7.19 and 7.20 releases including profile changes, custom progress notes, assessment enhancements, bulk care planning and enhanced digital signatures.

★★

EHR: Maximize Care Revenue

The Billing Recommendation feature is the critically important bridge between Yardi EHR and Voyager Senior Housing. When managed correctly, it enables streamlined billing and maximizes the revenue generated from care and other services. This session will cover best practice recommendations for configuring assessment points; available billing options, including chart-based billing; and maximizing care revenue by calculating cost of care scheduled.

★★

Senior IQ: New Features for EHR

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

Visit YASC San Diego for event details.

This class list is subject to change at any time.