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Yardi voyager 7s user manual

Yardi has been developing asset management platforms for over thirty years—an eternity in the software industry. Many of Yardi’s customers have used their solutions for a long time. For businesses running legacy versions of Yardi, or entry-level solutions like Yardi Breeze, pressures brought by growth, management requirements, or competitive necessity can prompt an upgrade to Yardi Voyager. Upgrading to the latest, full-featured version of Yardi is an opportunity to deepen a business’s understanding of its processes. The upgrades frequently bring surprising changes. Ideally, those changes are universally for the better. At 33Floors, our implementation process is designed to guide our clients to that ideal outcome. These are some of the ideas we recommend at the preparation stage.

Study and refine requirementsThe changes can be astonishing for businesses migrating from a significantly older version of Yardi to Voyager 7S. All the old capabilities are there, typically with improved user interfaces and new tools for managing and manipulating data. The new capabilities in the latest Voyager versions offer users the opportunity to refine and, in some cases, replace long-standing processes. To get the most from Voyager on day one, begin the transition planning process with a thorough review of the organization’s requirements for the platform. There are several components to this analysis: How is the existing platform being used? What limitations in the existing platform will Voyager solve? How can Voyager change fundamental processes, like rent collection and project management, for the better? These are not easy questions to answer, especially once the team begins to dig into the details. One of the key values 33Floors brings to the upgrade process is our understanding of how sophisticated Yardi users can get the most from Voyager. Plan for changes to the way you work: Cloud-based storage, integration with mobile apps, and a vast suite of modular capabilities in many ways make Yardi Voyager a new tool. It’s common for CFOs and IT managers to approach the upgrade to Voyager with an attitude of “if it isn’t broken, don’t fix it.” It’s also common for the due diligence process to uncover opportunities that CFOs and IT managers can’t resist. When everything is accessible from the cloud, executives often find themselves accessing their database more often and in more contexts. Giving a detailed answer to a question about numbers can be as simple as picking up your iPad. Such streamlined capabilities raise demands for new tools, like customized reports and views, to make those lunchtime conversations even more productive. Have a deliberate training strategy: Tools are only useful in the hands of a skilled operator. At 33Floors, we dedicate significant resources to ensure that our clients have the training resources they need to hit the ground running with their new implementation. Before and during the rollout of Yardi Voyager 7S, staff need extra guidance. The upgrade process should incorporate support strategies into every stage. These are some of the training efforts our clients have found most useful: Don’t forget Yardi’s help line. Yardi itself provides its customers with an allocation of dedicated support. During major transitions, the helpline is a great first stop to address technical questions. On-time training. We time training sessions to correspond with launch days, so users can begin using their new skills right away. Branded documentation. Customized support literature, provided directly within Yardi and created to match the client’s preferred style, can provide fast and easy answers to the questions that come up most often within a particular business or team. Intensive support after launch. The first weeks and months of using a new version of Yardi are critical times for developing good habits and addressing knowledge gaps. At 33Floors we offer our clients Hypercare, a dedicated support service that will answer questions quickly and with a clear understanding of the client’s unique implementation. Let 33Floors be your guide to Yardi Voyager 7S: Is your business contemplating a major upgrade to its Yardi system? Bring in the experts. The implementation and support teams at 33Floors bring together technical expertise with deep business experience. We will guide you through every step of the process and stand by to ensure your goals are being met. Connect with 33Floors today to get started. This client, a government housing authority, reached out to Saxony Partners because Yardi was about to end their support of Voyager 6. They needed to upgrade to version 7S and begin implementing some new modules to help them maximize their use of the software. THE PROJECT As a public housing authority, this client typically works with housing vouchers and low-income housing. They had more than 30 housing assets to oversee at the time of this project, and they were in the process of adding new offices and senior living. The client uses Yardi on a daily basis to manage these assets, but they were past due for an upgrade. Yardi was about to completely stop supporting Voyager 6, so they needed to implement version 7S as soon as possible. Without Yardi support, they would not have access to any enhancements to the modules they were using every day. Once they upgraded, they could begin utilizing some of the most helpful modules, as well as improve their reporting. The client chose Saxony Partners above other bidders to handle this upgrade because our Yardi team demonstrated how thoroughly we would handle the Voyager 7S upgrade, improvements to their construction module, and organization for their chart of accounts. DEFINING BUSINESS REQUIREMENTS Since this was a non-traditional real estate client, Saxony Partners compiled a Business Requirements Document to better understand their internal processes. Once we had a thorough and complete understanding of what their businesses does every day, we were able to give them a detailed analysis of where costs could be reduced in order to free up funds for this project. We spent between 2 and 3 weeks on-site with the client gathering information. Then, we put together a proposal for the best plan of action for tackling the Voyager 7S upgrade, implementing the job cost, and taking care of their chart of accounts. We also advised them on dealing with inter-company receivables, turning on inter-entity accounting, and performing GL allocations. We explained how these new features would impact their reporting needs, as well. IMPLEMENTING YARDI SOFTWARE The process of moving the client from Yardi Voyager 6 to 7S was multi-faceted. First, our team had to move them from their self-hosted Yardi Voyager 6 platform to a Yardi-hosted Voyager 6. Once they were on the Yardi-hosted platform, they were able to upgrade to Yardi Voyager 7S. We then helped the client configure both the menus and security setup properly in order to support the 7S features now available to them. We executed the conversion data work that is necessary for things to run smoothly. We also oversaw their validation testing to ensure the software upgrade was problem-free. ADDING NEW YARDI MODULES Once the client was successfully using Yardi Voyager 7S, we set them up to take advantage of some new modules. We assisted with setting up PayScan Mobile so that their employees can use this feature on the go. We also helped the client ensure they were within compliance of government standards for chart of accounts, made advancements in their construction module, and set up custom reporting features to meet their unique needs. THE RESULT Now that this client is operating on Yardi Voyager 7, they will not have to worry about their support from Yardi lapsing. They have access to the full array of Yardi modules and features, and they can better serve their tenants. Partnering with Saxony, the client tapped into the vast resources offered by our experienced team of Yardi experts. This ensured that major software upgrades and module implementations they needed would happen on schedule, on budget, and risk free. The Ultimate Yardi Guide We’ve just released The Ultimate Yardi Guide for 2021. It’s packed with the best Yardi insights from professionals just like you: Top Yardi Add-ons Yardi Workflow Tips Yardi Tips for Beginners Security Concerns in 2021 Get your copy today!

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