

Partner Certification Curriculum Outline

Purpose and Scope:

- Create a solid foundation that will ensure all partners will have learned the skills needed to be successful when using the VL platform.
- Provide flexibility to take courses along with their live training to provide a deeper understanding
- Completing the Certification Courses will give proof the user has undergone in-depth training on the platform and acquired in-depth asset management knowledge
- Available to all Partner programs who require additional onboarding for new members

Overall Certification Structure

- 6+ Courses & Assessments
- Complete all courses to become a “Certified Partner” in the Visual Lease Platform. Provided a badge for LinkedIn et., al
- Each course will contain modules (videos) and an assessment.
 - Each Test will need an 80% or higher to be considered professionally certified.
- Alerts and reporting are trackable for partners
- VL Partner Certification admin available for technical support
- Option to add partner as an admin to track their own personnel that is onboarding**???
- **Structure and content subject to change based on feedback, enhancements to the product, etc...

Course Structure

Learning Plan – Professional Certifications

- Course 1: Platform Orientation (Prerequisite to open the rest of the courses)
 - LMS Name: Platform Essentials Professional Certification
 - Time: (1 hour 18 minutes)
 - Objectives: This beginners’ course will show you how to login to Visual Lease, navigate through the platform and identify key resources. After watching this course, you will be on your way to getting to know the basics of Visual Lease!
 - Modules
 - Platform Overview (Video)
 - Configuring User Access (Video)
 - Platform Contacts (Video)
 - Navigate a lease record (SCORM)
 - Create a record (Scorm)

- Course 1 Assessment
- Course 2: Platform Setup and Financials
 - LMS Name: Platform Setup and Financials Professional Certification
 - Time: (1 hour 14 minutes)
 - Objectives:

This course will give users an in-depth look at the following Lease Financial functionalities:

 - Assign and Manage Payees within a lease record.
 - Navigate the calendar and financial entries section within a lease record.
 - How to apply payments to your portfolio.
 - Modules
 - Lease Financials – Payees (SCORM)
 - Lease Financials – Entries (SCORM)
 - Lease Financials – Calendar (SCORM)
 - Lease Financials – Payments (SCORM)
 - Platform Setting and Key Field setup (Video)
 - Course 2 Assessment
- Course 3: Lease Accounting Basics
 - LMS Name: Lease Accounting Basics Professional Certification
 - Time: (1 hour 33 minutes)
 - Objectives:

This course is designed to cover the basics behind building accounting calculations in Visual Lease’s Lease Accounting Module. Our goal is to ensure you have what you need to gain compliance with the newest accounting standards published by FASB, IASB and GASB.

By the end of this course, learners should be able to:

 - Understand the various inputs of a lease accounting calculation and how to create a lease schedule from these inputs.
 - Manage calculations transitioning to the new standard.
 - Import template layouts.

- How to generate multiple calculations on different leases at one time.
- How to measure or adjust existing calculations.
- Modules
 - LAB – New Calculation (SCORM)
 - LAB – Transition (SCORM)
 - LAB – Modification (SCORM)
 - LAB – Terminations (SCORM)
 - LAB – Import Calculations(SCORM)
 - Course 3 Assessment
- Course 4: Reports and Lease Filters
 - LMS Name: Reports and Lease Filters Professional Certification
 - Time: (1 hour 22 minutes)
 - Objectives:

This course is designed to provide you with an overview of some of our key non-accounting standard reports, how to create ad hoc reports within the platform, and set up Lease List Filters.

By the end of this course, learners should be able to:

 - Identify the various means of including or excluding leases from a generated report.
 - Differentiate between the list of available reports to find the data
 - Leverage the report options for each report in order to review lease data in a meaningful way.
 - Define the different fields that can be included in a custom report.
 - Leverage the Report and Excel Settings to further tailor the output.
 - Generate and save unique reports based on business needs.
 - Create lease list filters for reporting
 - Modules
 - Lease List Filters (SCORM)
 - Standard Lease Reporting (SCORM)
 - Ad Hoc Reporting (SCORM)
 - Lease Accounting Report (SCORM)
 - Roll Forward Report (SCORM)

- Course 4 Assessment
- Course 5: Configurations, Setup, Advanced Reporting
 - LMS Name: Admin Setup & Processes Professional Certification
 - Time: (40 minutes)
 - Objectives:

This course will walk you through the various platform configurations and setup during your onboarding. This course will cover:

 - Configuring Financial Categories
 - Configuring GL & Chart of Accounts
 - JE Summary Report
 - Standard Payments Report
 - Modules
 - JE Summary Report (SCORM)
 - Configuring Financial Categories (Video)
 - Configuring General Ledgers and Chart of Accounts (Video)
 - Standard Payment Report (SCORM)
 - Course 5 Assessment
- Course 6 –Advanced Visual Lease
 - LMS Name: Advance Visual Lease Functions Professional Certification
 - Time: (45 Minutes)
 - Objectives:
 - Modules
 - Net Present Value (SCORM)
 - Roll Forward Troubleshooting (VIDEO)
 - Disclosure Report Troubleshooting (VIDEO)
 - Functional Currency & Foreign Exchange Rates (SCORM)
 - Non-Continuous Lease Term and Fund Accounting (VIDEO)
 - Intro to Day 2 Accounting (SCORM)
 - Course 6 Assessment

- Course 7 – ESG (TBA)