



Resident Portal Orientation

Orientation Series

One-On-One Training

Training & Implementation FAQs

Why is Training Important?

Although the PropertyBoss application is very intuitive to use, training can greatly accelerate the learning curve and provide clients with a greater understanding of the configuration options and robust feature set included in PropertyBoss.

What is Web-Based Training?

Web-Based Training is a one-on-one session where the instructor connects directly to the client's PC to provide hands-on experience. A computer, Internet connection and phone are required to conduct the training session.

What Type of Training Is Offered?

PropertyBoss offers Basic, Intermediate and Advanced training courses. Basic courses provide an understanding of how to configure and use the base system and allow users to improve their overall familiarity and efficiency with PropertyBoss. Intermediate courses cover additional areas typically of interest to users once they are familiar with the base system. Advanced topics cover Add-On Modules, advanced features and user-defined agendas created specifically to cover unique needs. Contact PropertyBoss for more information.

How Is Training Scheduled?

Training can be scheduled online at <http://training.propertyboss.com> or by calling us at the number below.

(864) 297-7661

Course Overview

To ensure that you have a successful experience with web services purchased from PropertyBoss, we would like to invite new clients to participate in our Resident Portal Orientation Program.

The Resident Portal Orientation Program is designed to familiarize you with the basic portal functionality and capabilities. This program typically lasts between 25 and 30 minutes and is conducted over the telephone. In this session you will learn how to navigate through the various aspects within the portal from point of view of the resident.



Course Outline



Portal Overview

- Registration
- Logging in
- External Links



Lease Information

- Current Lease Status, Balance, and Deposits Held
- Optional Payment Portal Access



Charges

- Viewing Lease Recurring Charges
- Next Billing Information
- Late Fee Information



Contact Information

- Update Existing Contact Information
- Update/Reset Password



Documents

- Media Added to the Property/Lease
- Ability to View and/or Download or Print Documents



Work Orders

- Creating New Work Orders
- Update Existing Work Orders
- Adding Optional Work Order Groups (i.e. Inspections, Marketing)