



Setting Up PropertyBoss

Basic Training Series

One-On-One Web-Based 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

This Basic Training Course provides clients with an understanding of core PropertyBoss concepts and features. Taught in a one-on-one web based format, the course is designed to enable clients to enter all their properties and units, create owners, tenants, and leases, and determine a "Go-Live" date. The course will also cover entering starting balances for both leases and owners.



Course Outline



Properties and Units

- Creating and Editing Properties and Units
- Entering Property Information
- Entering Owner Information for the Property
- Entering Repeating Charges
- Entering Default Information



Leases

- Creating and Editing Leases
- Entering Start and End Dates
- Entering Rent Amount
- Entering Other Charges, Late Fees, Details
- Entering Tenant Information
- Entering Other Information



Owners

- Creating and Editing Owners
- Entering Owner Information
- Viewing Other Owner Information



Tenants

- Creating and Editing Tenants
- Entering Tenant Information
- Viewing History



Enter Starting Balances

- Determining the "Go-Live" Date
- Entering Starting Balances for Leases
- Entering Starting Balances for Owners