



# Training & Implementation



## Managing Transactions

## 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 related to the management of transactions. Taught in a one-on-one web based format, the course is designed to enable clients to develop an understanding of how to setup transactions, post charges, record tenant payments, create account payables and pay owners.



#### Course Outline

- **Auto-Post and QuickPay**
  - Posting Recurring Charges
  - Viewing Payment, Paid Thru, Rent and Lease Information
  - Posting Tenant Payments and Printing Receipts
- **Transaction Types**
  - Creating and Editing Transactions
  - Defining Transactions
  - Determining Transaction Priority
- **Deposits and Deposit Maintenance**
  - Creating Deposits
  - Defining and Using Deposit Types and Periods
  - Opening and Closing Deposits
  - Viewing Deposit Report Information
- **Payables**
  - Turning on Accounts Payable
  - Creating and Editing Invoices
  - Maintaining Accounts Payable Batches
- **Paying Owners**
  - Creating Payments to Owners from the Owner Notebook
  - Creating Individual Payments in the Register
  - Sending Payments to QuickBooks for Paying Owners