Managing Daily Activities   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 daily activities that include move-ins/move-outs, renewals, transfers, inactive property management, and printing owner/tenant statements.

Course Outline

Move-In Process (Including Prospects)
- Moving a New Tenant Into a Property or Unit
- Moving a Prospect Into a Property or Unit
- Managing the Make-Ready Process

Move-Out Process
- Determining Effective Dates
- Executing a Move Out
- Accessing Past Leases

Renewals
- Renewing Leasing
- Viewing Renewal History
- Changing Lease Amounts

Transfers
- Transferring Tenants
- Entering Required Information
- Move Lease to Another Unit

Making Properties/Units Inactive
- Making Properties and Units Inactive
- Viewing Inactive Properties and Units
- Reactivating Properties and Units

Lease/Owner Statements
- Defining Owner Statement Information
- Defining Lease Statement Information
- Printing Statements