



Managing Work Orders and Work Processes

Intermediate 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 Intermediate Training Course provides clients with an understanding of core PropertyBoss concepts and features related to Work Orders and Custom Work Processes. Taught in a one-on-one web based format, the course is designed to enable clients to set up work order groups, work orders, inspections, log calls, create custom checklists, and print work orders for vendors.



Course Outline

Setting Up Work Order Preferences

- Creating Work Order Groups
- Editing Work Orders
- Importing and Exporting Work Order Groups

Inspections

- Creating a New Inspection
- Completing Inspection Information
- Completing Details
- Viewing History
- Adding Media and Transactions

Call Logging

- Creating a Call Log
- Completing Call Log Information
- Completing Call Log Details
- Viewing History
- Adding Media and Transactions

Work Orders and Checklists

- Creating a Work Order
- Completing Work Order Information
- Completing Details
- Viewing History
- Adding Media and Transactions
- Creating, Updating and Deleting Checklists
- Defining Repeated Work Orders
- Adding Related/Unrelated Call Logs, Work Orders, and Inspections

Printing Work Orders and Merlins

- Printing Work Orders for Vendors, Tenants, Owners, or Others
- Modifying Work Orders Merlin to Create Custom Reports
- Defining Directions to Print on Work Orders for Vendors