



## Creating User Defined Reports and Letters

## 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 Creating reports and letters that are user-defined and company specific. Taught in a one-on-one web based format, the course is designed to enable clients to create user-defined reports, customize letters and box scores, as well as define report groups.



### Course Outline

#### **Merlin Reports**

- Modifying the Default Layout
- Selecting Groups
- Defining Sort Fields
- Defining Filter Fields
- Saving Reports and Setting Default Reports

#### **Report Groups**

- Creating Custom Report Groups
- Defining Reports Contained in a Report Group
- Saving a Report Group

#### **Report Heading Customization**

- Defining Report Heading Fields
- Defining Report Images
- Saving Report Settings

#### **Letters (MS Word and PropertyBoss Field Merging)**

- Customizing a Standard Letters
- Importing a Microsoft Word Letter
- Merging PropertyBoss Fields into a Microsoft Word Letter
- Printing Letters to Multiple Tenants and/or Owners

#### **Box Score Customization**

- Defining Box Scores
- Customizing Box Score Information
- Adding and Deleting Box Scores