



## Managing Inspections

## 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>.

**(800) 562-0661**

#### Course Overview

This Intermediate Training Course provides clients with an understanding of core PropertyBoss concepts and features related to Inspections. Taught in a one-on-one web based format, the course is designed to enable clients to set up inspection templates, assign inspections and track the status, condition, charges, and print inspections for tenants and property managers.



#### Course Outline

##### 🍏 Setting Up Inspection Preferences

- Creating Inspection templates
- Editing additional Inspection information (assigning templates, default settings, and descriptions)
- Create repeating Inspections (annual, semi-annual, monthly, etc.)

##### 🍏 Inspections

- Creating a new Inspection
- Completing Inspection Information
- Completing Details
- Viewing History
- Adding Media
- Adding Related/Unrelated Call Logs, Work Orders, and Inspections

##### 🍏 Tracking Condition and Charges

- Track Move-in or Move-out condition
- Enter charges for repairs
- Create repair Work Orders

##### 🍏 Printing Inspections and Merlin Reports

- Printing Inspection forms or Condition Reports
- Modifying Inspection Merlin to Create Custom Reports
- Email Inspections to assigned contacts