Training & Implementation

PROPERTYBOSS ®
SOLUTIONS

Setting Up Your QuickBooks Database   Accounting Training Series

One-On-One Web-Based Training

Accounting Training FAQs

Who is a Valued Partner?

Although the PropertyBoss application is very intuitive to use, we believe that there are areas that can be greatly enhanced through the use of outside experts. We have selected Valued Partners to provide expertise in the use and functionality of QuickBooks in a property management setting. They also carry the designation of Advanced Certified QuickBooks ProAdvisor. This relationship provides our clients with a greater understanding of the integration of PropertyBoss and QuickBooks.

Why is it Important to Utilize a QuickBooks Pro Advisor?

Advanced Certified QuickBooks ProAdvisors have earned the highest designation of training provided. We have chosen our Valued Partners based on this qualification. The proper integration and use of QuickBooks with PropertyBoss is crucial to the tracking and accounting of the finances associated with all types of property management settings.

What Type of Accounting Training is Offered?

PropertyBoss offers several courses in the Accounting Series. Courses range from setting up your new QuickBooks database to advanced topics to help you use of both PropertyBoss and QuickBooks more effectively. 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 Accounting Course provides clients with an understanding of the core concepts of setting up and establishing your QuickBooks company file. This course is taught in a one-on-one web based format by our QuickBooks ProAdvisor partner. After this course, clients will have setup their QuickBooks company file with their chart of accounts, preferences, and fiscal year start date. Once the QuickBooks setup has been completed, the interface between PropertyBoss and QuickBooks can be established.

Course Outline

Installing QuickBooks
- Determining Configuration
- Choosing Installation (Express vs. Custom)
- Registering Software

Setup Company in QuickBooks
- Creating Company Information
- Organizing Your Company
- Selecting Your Industry

Creating Accounts
- Adding Balance Sheet Accounts
- Editing Income/Expense Accounts

Adjusting Preferences
- Defining Fiscal Year Start
- Adjust Company Preferences
- Adjust Personal Preferences (My Preferences)

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