# Training & Implementation

PROPERTYBOSS SOLUTIONS

## Integrating PropertyBoss and QuickBooks

## 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 integration of PropertyBoss and QuickBooks. Taught in a one-on-one web based format, the course is designed to enable clients to set up the communication and mapping of the PropertyBoss software and the client's QuickBooks files.

ACCOUNTING

## Course Outline

### Setting Up the Accounting File

- Determining the Accounting Method
- Locating the Path to QuickBooks file and/or PropertyBoss Remote
- Selecting Class Structure

### Importing the General Ledger Setup

- Creating Required Accounts in QuickBooks
- Importing Chart of Accounts, Vendors and Classes
- Mapping Transactions
- Defining Transaction Set
- Identifying Obsolete Transactions Setup Preferences

### Using the Interface

- Viewing PropertyBoss Transactions
- Identifying "Already Sent" Transactions
- Verifying Transactions Include Green "OK"
- Filtering Transaction and Items to be Sent

### Assigning Properties/Owners Company Files

- Identifying Location of Accounting File and Transaction Set on the Property Notebook
- Identifying Location of Accounting File and Transaction Set on the Owner Notebook

### Classes

- Explaining Process of Sending Classes From PropertyBoss to QuickBooks
- Identifying Location of Assigning Classes on the Property or Owner Notebook