



Training & Implementation



Internal General Ledger Basic Training One-On-One Web-Based Training

Accounting Training Series PropertyBoss General Ledger

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 (800) 562-0661.

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Course Overview

This one hour session is designed to be utilized by the user looking for basic training on the functionality of the PropertyBoss Internal General Ledger. The user will receive the basic knowledge on how the PropertyBoss Internal General Ledger works, how to setup the defaults for printing checks, the Chart of Accounts, and other various defaults used within the General Ledger.



Course Outline

Basic Overview

- General Ledger capabilities
- Setting up an accounting file

Managing Your Chart of Accounts

- Creating and customizing accounts
- Organizing your chart of accounts

Making Deposits

- Tracking deposits
- Managing bank account deposits

Paying Bills and Printing Checks

- Grouping bills for payment and paying bills (including printing checks)
- Applying discounts and credits

Reports

- Customizing report layouts
- Report criteria and running reports

Budgets

- Creating a budget
- Running budget reports