

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

# PropertyBoss Solutions — PropertyBoss

800-562-0661 [www.propertyboss.com](http://www.propertyboss.com)

Dec. 22, 2005

From the January 2006 [Review of Property Management Software](#)

PropertyBoss provides management capabilities for property management companies

with multi-family, single-family, condominium, mobile community, short-term rentals and commercial holdings. The system includes all resident relationship functions, from prospect tracking to tenant screening, leasing, rent and late-fee posting, AR, and work order management. The vendor also offers several add-on modules for credit reporting, electronic payment, web connectivity, utility billing and collections. The core PropertyBoss system costs \$799 for up to 100 units. For companies managing fewer than 50 properties, PropertyBoss provides a lower-cost option with much of the same functionality as PropertyBoss.

Paul Kessler is one of two regional property managers working for Perrel Management

Company, Inc. ([www.perrel.com](http://www.perrel.com)), a small

Virginia-based multi-family housing management company that manages 2,175 apartments

at 10 different locations throughout the Tidewater area. In addition, Kessler oversees a 701 unit self-storage facility. Kessler says: "Extensive tenant documentation and detailed reports were the deciding factors in selecting this software."

In addition, we were able to perform the installation and database conversion ourselves.” Kessler appreciates the fact that the software can be tailored to fit each community’s needs. “Reports are superb,” he notes, “and tracking and accounting for subsidy rent payments is excellent.”

Kessler recommends that new or potential clients train a small team of key managers/property managers onsite, noting that PropertyBoss Solutions has an excellent three-day training program. “This group should include at least one computer savvy (geek) person capable of learning the software installation process and the database conversion process. If you do not have a computer tech on your staff, Property Boss will set up and do the database conversion for you,” Kessler said. “Also, conduct a locally based training session with all personnel who will be using the software. Once your staff is trained, the team that received detailed training at Property Boss should be able to support your staff with detailed training and resolving any issues. Finally, if you purchase the software for multi-family housing management, include the Log File Tracking and Prospects Modules, and purchase the support package. You will need the support package in order to keep the software up-to-date.”

### **INTERFACE/EASE-OF-USE – 5 Stars**

PropertyBoss opens to a unique but very intuitive work screen that eschews most of the traditional icon-based navigation methods. Instead, the system’s primary interface opens to the customizable PropertyBoss Today screen, which shows actions to which the user needs to attend and the status of properties, such as late payments, application of late fees, upcoming lease expirations and move-ins/move-outs, along with graphical elements that include an occupancy pie chart and prospect performance indicator. The elements and metrics displayed on this screen can be selected by the user. Along the left side of the screen is a text-based link menu for accessing the primary functions of the system.

Setting up new properties or tenants is straightforward and guided by the system and allows attaching of photos and documents, as well as input of notes such as directions to the property. The Tenants Navigator screen provides a sortable, searchable and filterable list of all clients, along with contact info and a few other items, such as whether they are current on their payments. The addition of a credit report-style payment history might prove beneficial here, allowing users to quickly see the long-term status of tenants. Client data screens provide a tabbed screen with access to basic info, details, miscellany, contacts and history (which includes a late-fee history), with pull-down selection

lists aiding in setup or changing of information. Client screens allow entry of multiple contact numbers, e-mail addresses, employer, driver's license and license plate numbers, and emergency contact, as well as the recording of birthdates, which some property management groups use to send greeting cards. The program's Rent Roll Navigator screen provides an at-a-glance display of the status of all tenant leases.

#### **MODULES/SCALABILITY – 4.5 Stars**

PropertyBoss includes general accounting functions for GL, AP and billing, but can also work in conjunction with several accounting suites. The system includes a prospect tracking function, which lets management capture prospective tenant information and manage all communication.

If the prospect becomes a tenant, all of the information can be instantly transferred into a tenant Lease Notebook. A variety of add-on modules is also available, including PropertySecure, which provides real-time credit and criminal reports; PropertyMeter for utility billing functions; and PropertyPay for electronic payment options such as e-check, phone, credit card and automated withdrawals. Web and e-mail options are available through PropertyWebHQ and PropertyEmail.

#### **INTEGRATION – 5 Stars**

PropertyBoss' modules are completely integrated, and the system's accounting functions can integrate with QuickBooks in real-time, as well as with Peachtree, Great Plains and Solomon through a guided data import/export function. Letters generated in the system can be exported to Word for further editing, formatting or e-mailing, and spreadsheets can be converted to Excel.

#### **REPORTING – 5 Stars**

PropertyBoss' reporting functions include more than 100 customizable standard reports, including analysis reports for loss to lease, pre-lease, vacancies, gross potential income and income statements, as well as collections and property-focused options. The system's Merlin Report Wizard can be used to edit or create custom reports. Reports can be e-mailed, saved or viewed on-screen without printing.

#### **SUPPORT – 4.5 Stars**

The system offers a good Help utility that includes content-specific assistance, as well as a free online support center. Live technical support is offered on

a per-incident basis with a minimum \$45 charge. The company also offers a variety of training options.

## **SUMMARY**

PropertyBoss offers an intuitive interface and a strong set of features, which is further enhanced by the optional modules. While the system includes core accounting functions, it is intended to work in concert with a third-party accounting system, and therefore does not offer some accounting elements such as check writing, banking and account reconciliation.

**2006 Overall Rating – 5 Stars**

Intuit, Inc. • Article

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved