



User Manual

Section 1: Welcome and Installation

Created: October 2010

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PropertyBoss Manual Section 1 - Welcome and Installation

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Home > Welcome To PropertyBoss

Welcome To PropertyBoss

Welcome to Einstein Answers v10.1! Einstein is designed to provide you with the necessary tools to be successful in your daily property management needs. This help console is designed to provide you with the basic answers to many of the first-time setup and daily activity functions utilized in PropertyBoss. We will continue to improve the help console and will strive to update the contents as needed to provide the most useful tool possible.



We designed PropertyBoss to mask the complexities of double-entry accounting, while providing the appropriate accounting controls. We believe that the combination of PropertyBoss with QuickBooks provides the most comprehensive and technically advanced property management system available. Here are some of the features included in PropertyBoss:

- Detailed property and unit information on easy-to-understand notebooks that you can customize to meet your needs. Link photos and maps to properties. Print property datasheets for handing to prospective tenants directly from PropertyBoss.
- Detailed records of all transactions. See when rent was posted and when rent was paid. Track phone calls, letters, visits, etc. directly in the register. Use PropertyBoss for tracking what will happen and what should happen on each lease. Use QuickBooks to pay bills, to record deposits, to handle payroll, to pay your bills electronically, and to manage the many other financial concerns of the typical property manager.
- Use our Merlin report writer to create custom reports to meet your needs. You can also use Crystal Reports, Excel, Word, or any other ODBC compliant program to write your reports.
- True 32-bit Windows performance from a technically advanced product. PropertyBoss is built on a powerful relational database, Sybase Adaptive Server Anywhere. Designed as a multi-user system, PropertyBoss meets the needs of both the small property manager managing just a few properties to the large property management company with hundreds or thousands of properties to manage.
- Automatic calculation of rent due, late fees, and recurring charges. Late notices automatically print when required.
- Merlin custom report writer for creating reports that are specific to your property management needs.
- A built-in navigator that makes it easier to move about the system. No more looking through endless menus or trying to guess the meaning of icons.
- The Rent Roll Navigator provides a color-coded view of the status of each lease. Sort the Rent Roll to see who's late, when payments are due, and by tenant name. Double-click a row to enter a new transaction.
- A built-in word processor for creating your own letters, notices, lease agreements, etc. Have the letters print with your PropertyBoss data included automatically.
- Track all activities and record history about all activities with our Work Order system. Define your own multi-step task processes such as Evictions, Move-In, Move-Out and Make Ready. You can also use the Work Order feature to print work orders (including directions to your properties!).
- Automatic posting of money from one account to another. For example, when rent is paid, the Owner is credited with the correct amount. You can easily view your Owner balances. You do not have to run a report to know the information is there.

Evaluating PropertyBoss for 30 Days

If you have not purchased PropertyBoss, you can use PropertyBoss for a 30-day period without a license. This evaluation period allows you to use the full product and to enter an unlimited amount of data for 30 days. During the evaluation period, you will be reminded of the number of days left in the evaluation period each time you log in.

How to Purchase PropertyBoss

When you are ready to purchase PropertyBoss, call us at 800.562.0661 to speak with one of our Sales Representatives. We accept checks, credit card and electronic check payment.

We will send you the latest version of PropertyBoss and send your registration information.

See also

[Installation Guides](#)

Home > Welcome To PropertyBoss > Company Information and Registration

Company Information and Registration

When you open your database for the first time after creating it, Company Information will open. Enter your company information in the spaces provided. This is the information that will print on reports and letters.

Training Database Registration

Welcome to PropertyBoss !

Please enter information to customize this training database to your company.

This information appears on reports:

Site Name

Contact

Address

City-State-Zip

Country ▼

Work Phone Fax

E-Mail

This information is used for communicating with PropertyBoss Client Care:

Parent Company

Contact Name

Contact E-Mail

Contact Phone

No Thanks. I'll register later. Register Now

Registration Numbers provides a place for you to enter your Account Number, Registration Number, PASS Registration and Registration Numbers for other PropertyBoss modules. To obtain a registration number, you will have to provide PropertyBoss Solutions with the DBKey shown on this window. The DBKey is unique for each database.

PropertyBoss Registration

Database Name **TAFCO** DB Key **20939**

Account Number **A20021**

PropertyBoss Registration

Registration Number **6U-6-250-608370** Expiration Date **12/31/2199**

Maximum Users **6** Maximum Units **250** Current Units **80**

PropertyBoss PASS

With PASS PropertyBoss annual subscription service, you receive:

- Technical Support Incidents
- Enhancement and Maintenance Releases

PASS Code **S101231870** Expiration Date **12/31/2010**

[Purchase PASS](#) [Request More Information](#)

Optional Modules

Consolidated Module	CONS1152	Request More Information
Audit Module	LOG974	Request More Information
Enhanced Media		Request More Information
Email Module	EMAIL03680	Request More Information
Low Income Module	CERT1217	Request More Information
LockBox Module	LOCK1854	Request More Information
Metering Module	METE1150	Request More Information
Mortgage Module		Request More Information

[Un-Register this Database](#)

Register this Database **Cancel** **OK**

Please contact Client Care via e-mail or phone to obtain a registration number. Send your five-digit DBKey number located in the login window to help@propertyboss.com or call us at 800.562.0661 x2.

See also

[PropertyBoss Software License Agreement](#)
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[Company Information and Registration](#)
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How To Obtain Assistance

PropertyBoss Solutions understands that our success is dependent upon your success. We want you to feel confident that you will get the help that you need. We also want to provide you with fast, efficient, and courteous service.

Avenues for Support

There are a number of avenues available for you to get the service you need. Some of these avenues are free and some have a cost associated with them:

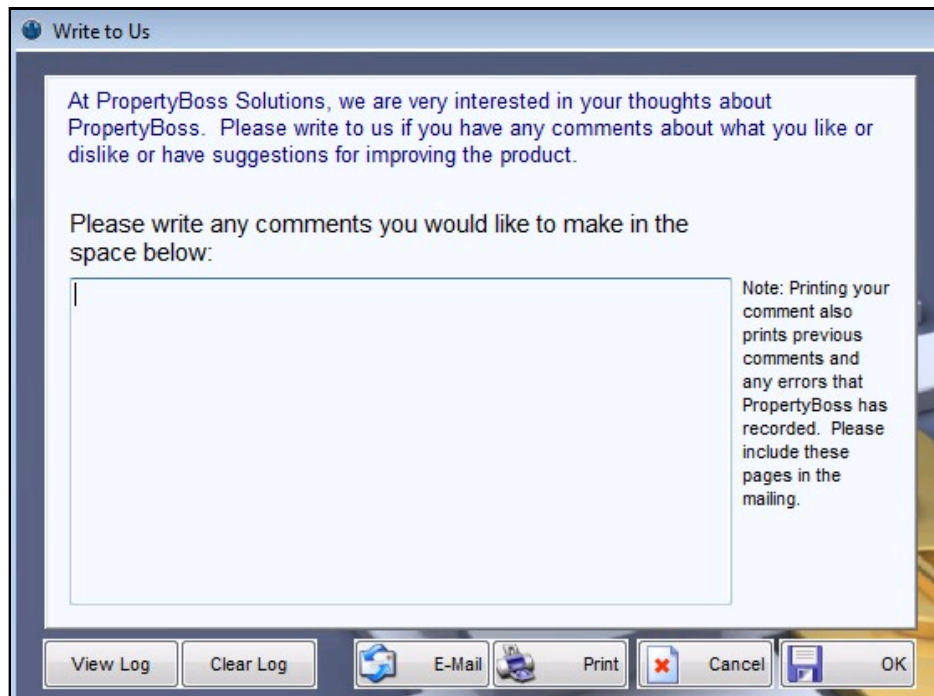
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- Telephone Support – available as part of an Preferred Annual Subscription Service (PASS) or on a pay-as-you-go basis. For details, go visit our website or call us at 800.562.0661.
- Fax and E-mail Support – Please send all requests for assistance to help@propertyboss.com or fax to 864.297.7047. Be sure to include the errorlog.txt file.

Before requesting assistance, please do the following:

- Attempt to duplicate the problem. If you can duplicate the problem, please write down the exact steps and data you used to recreate the problem. This step is probably the most important thing you can do to help us resolve the issue quickly. If you can reproduce it and if you have the steps documented, then we can fix the problem very quickly.
- If you are communicating with us via fax, telephone, or regular mail, please print the Write to Us report that gives system trace information. This report is very important to helping to resolve your problems.

To Produce the Report

1. Click -Tools and then select Write to PropertyBoss Support
2. Enter any steps and details about the problem in the noted space
3. Click Print.
4. If you are communicating with us via e-mail, please attach the file errorlog.txt located in the PropertyBoss directory (typically c:\Program Files\PropertyBoss\errorlog.txt). Be sure to include your company, name, phone number, and fax number on the e-mail. Send the file to help@propertyboss.com.



The image shows a 'Write to Us' dialog box with a blue title bar. The main text area contains a welcome message and a request for feedback. Below the text is a large text input field. To the right of the input field is a note about printing. At the bottom is a toolbar with buttons for 'View Log', 'Clear Log', 'E-Mail', 'Print', 'Cancel', and 'OK'.

Write to Us

At PropertyBoss Solutions, we are very interested in your thoughts about PropertyBoss. Please write to us if you have any comments about what you like or dislike or have suggestions for improving the product.

Please write any comments you would like to make in the space below:

Note: Printing your comment also prints previous comments and any errors that PropertyBoss has recorded. Please include these pages in the mailing.

View Log Clear Log E-Mail Print Cancel OK

See also

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About PropertyBoss

PropertyBoss is a product of PropertyBoss Solutions. The principals in PropertyBoss Solutions have been involved in the production of commercial software primarily for Fortune 500 companies for the last 20 years. We also have been involved in consulting with real estate companies on the implementation of accounting packages such as QuickBooks and Peachtree Accounting. PropertyBoss is a direct result of our inability to find Property Management software that was as easy to use, and that hid the intricacies of double-entry accounting, and that worked well for a very wide range of clients.

See also

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Write To Us

We are constantly working to make PropertyBoss a better product. We value your input into this process. We constantly review client comments and incorporate them into additions/changes to the product that benefit everyone. If you have any type of system problem, the error information is automatically logged by PropertyBoss and stored in a file. This file should be sent to us with any communication.

Feedback

There are a number of ways of getting feedback to us including:

- Use Write to PropertyBoss Support. You can record comments and suggestions and send them directly to us
- You can e-mail the suggestion to us. Please feel free to send any message to help@propertyboss.com
- You can fax your suggestions to our fax-line: 864.297.7047
- You can mail the suggestions to us: 403 Woods Lake Road, Suite 208, Greenville, SC 29607
- You can call us: 800.562.0661. We prefer to receive your comments on paper, but we will be happy to discuss any enhancement with you over the phone.

The more detail on your suggestion the better. We have found that print-outs of reports with hand-written notes or drawings are the best way for you to express your comments and ideas to us.

To Send Us Comments or Suggestions (from PropertyBoss)

- Use Write to PropertyBoss Support from Tools on the Navigator.
- Enter your comment or suggestion in the area provided.
- When you are finished, click OK to record your comment.
- To print the comments/suggestions for mailing or faxing simply click Print.
- To e-mail the comments/suggestions click E-mail. This automatically sends a message via e-mail to PropertyBoss with the error log attached.
- After sending us your comments/suggestions click Clear Log to empty the errorlog.txt file.

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Home > Installation Guides

Installation Guides

This section outlines the requirements for and instructions to install PropertyBoss 2009 and to update PropertyBoss data created in previous versions.

Role of a Network Professional

We recommend that you enlist the services of a network professional to install this software if you are not familiar with the operation of software in a network environment.

If you are upgrading and your network professional installed PropertyBoss initially then we recommend that you have your network professional install the upgrade as well. At a minimum, you should consult your network professional prior to attempting the upgrade.

See also

[Single User Installation Guide](#)
[Network Access Installation Guide](#)
[PropertyBoss on Mac Computers](#)
[Remote Access](#)
[Upgrade Installation Guide](#)
[Database in Test Mode](#)
[Installation Troubleshooting](#)

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Single User Installation Guide

Introduction

The single user version of PropertyBoss allows access to PropertyBoss data from one computer only. User accounts are not created; therefore, any staff member that logs onto the computer on which PropertyBoss is installed can access PropertyBoss. To install PropertyBoss on a single computer:

- You will designate one computer in your office on which to install PropertyBoss. You will create your database and enter your property management data on this computer.

Instructions

1. [Download and install PropertyBoss in Single User mode](#)
2. [Download and install the training database for your industry](#) (if necessary)
3. [Create your production database](#)
4. [Open your database and create a temporary license](#)
5. [Obtain your permanent registration numbers](#)
6. [Schedule a reminder to backup your database](#)

Installation Tips

- If you are unable to complete any of the above steps, submit a request for help to Client Care: help.propertyboss.com.
- If you would like to have the software fulfillment email resent or an installation CD mailed to you, submit a Client Care request: help.propertyboss.com. (You will be billed for an installation CD.)
- If your computer is running the Vista operating system, User Access Control (UAC) messages will periodically pop-up during installation. Always click Allow on these windows.
- If your computer is running a firewall, warning messages will periodically pop-up during installation. Always click Unblock on these windows.

See also

[Network Access Installation Guide](#)
[PropertyBoss on Mac Computers](#)
[Remote Access](#)
[Upgrade Installation Guide](#)
[Database in Test Mode](#)
[Installation Troubleshooting](#)

Home > Installation Guides > Single User Installation Guide > Step 1: Download and Install PropertyBoss in Single User Mode

Step 1: Download and Install PropertyBoss in Single User Mode

PropertyBoss enables you to manage your leases and perform other useful property management functions. In this step, you will download and install PropertyBoss to the single computer in your office from which you want to access PropertyBoss. You will choose Single User as the installation mode. If you are installing from the installation CD, skip Part A and continue with Part B below. If you have previously installed PropertyBoss to this computer in Evaluation mode, skip Part A and Part B and continue with Part C below.

- [Part A: Download Instructions](#)
- [Part B: Installation Instructions](#)
- [Part C: Change Installation Mode Instructions](#)
- [Possible Issues](#)

Part A: Download Instructions

1. Click the download link in the software fulfillment email. The PropertyBoss web site will open with links for downloading several items including PropertyBoss and helpful documentation
2. Click the download button for PropertyBoss. On the next web page, click the download button again. When prompted to Run or Save, Save the file to your desktop.



3. When the download is complete, a pboss.exe icon will appear on your desktop. (The number in the file name represents the PropertyBoss version.)



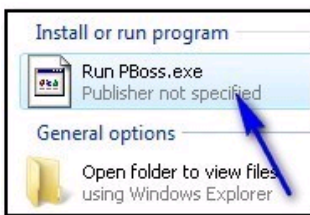
Part B: Installation Instructions

1. Shut down all programs. It is also recommended that you temporarily disable antivirus software as it could prevent various files from being updated during installation. Once installation is complete, you can re-enable your antivirus software.

If you are not familiar with antivirus software, we recommend consulting your IT professional who can ensure that you do not leave your computer vulnerable to attacks.

2. Double-click the pboss.exe icon on your desktop and progress through the installation wizard.

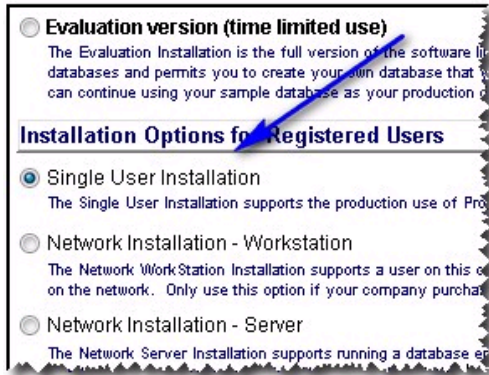
(If you are installing from the installation CD, insert the CD and run the file pboss.exe when prompted. If you are not prompted, view the files on the CD and double-click the pboss.exe file. Progress through the installation wizard.)



3. If prompted for the installation location, you can accept the default location.
4. When the installation wizard is complete, two icons will appear on your desktop: (1) PropertyBoss opens the software and (2) PropertyBoss Einstein opens the online help documentation.



- To complete installation, double-click the PropertyBoss icon. Choose Single User as the installation mode and click OK.

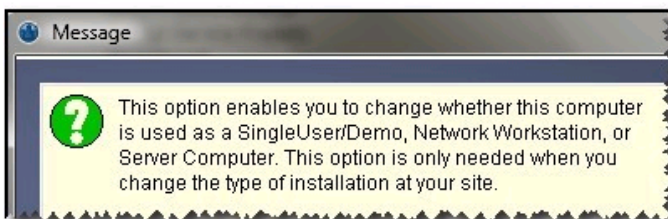


- A database selection window may open. Close the window to close PropertyBoss. You can delete the pboss.exe icon from the desktop.

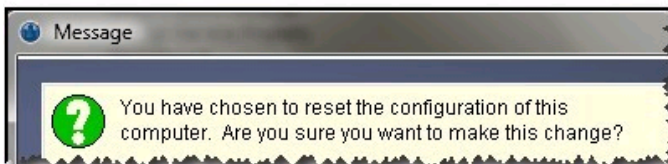
Part C: Change Installation Mode Instructions

Complete this section only if you previously installed PropertyBoss in Evaluation mode.

- Double-click the PropertyBoss icon on your desktop. The window listing your databases will open.
- In the bottom left corner of the window, click the blue link: Change Installation Configuration. A window will open describing the action you are performing. Click Yes.



- An "are you sure" window will open. Click Yes again.



- A window will display confirming that your previous installation mode has been reset. Click OK.
- The list of databases window will open. Click Cancel to close this window.
- Double-click on the PropertyBoss icon to login to PropertyBoss again. This time, you will be prompted to choose the new installation mode. Choose Single User and click OK.

Possible Issues

- If you need multiple staff members to access PropertyBoss from various computers, you need to purchase and install the network or web version of PropertyBoss. You cannot create user accounts or access the database from multiple computers with a single computer installation.
- If you did not save the installation file to your desktop and are not sure where to locate it, search your computer for the pboss.exe file or download the file again and note the download location.
- If the installation wizard for PropertyBoss stops at over 90% complete, PropertyBoss probably installed successfully. Confirm PropertyBoss will open by double-clicking on the PropertyBoss icon on your desktop. If necessary, manually add the icon to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pboss.exe and choose to send a shortcut to your desktop.
- If you chose the wrong installation mode, you need to switch to Single User mode. You do not need to remove or re-install PropertyBoss. Additional instructions for switching installation modes are presented in the [Troubleshooting](#) section.

[Next Step](#)

Home > Installation Guides > Single User Installation Guide > Step 2: Download and Install the Training Database for Your Industry (if necessary)

Step 2: Download and Install the Training Database for Your Industry (if necessary)

In a later step, you will create your production database. To do so, you will copy a PropertyBoss training database pre-configured with the correct settings for your industry. If you manage homeowners' associations, student housing, or commercial properties, you need to download and install the training database for that industry so that it is available to copy when creating your production database.

If you manage multifamily or fee-based residential properties, you can skip this step. These training databases install automatically when you install PropertyBoss. If you installed from the CD, you can skip this step. All training databases install automatically when you install from the CD.

- [Part A: Download Instructions](#)
 - [Part B: Installation Instructions](#)
-

Part A: Download Instructions

1. To access the download page for training databases, go to the PropertyBoss web site: www.propertyboss.com > Get Started > Downloads.
2. Click the icon for the database that represents your industry. When prompted to Run or Save, Save the file to your desktop.



3. When the download is complete, a Training.exe icon will appear on your desktop.



Part B: Installation Instructions

1. Shut down all programs.
2. Double-click the Training.exe icon on your desktop and progress through the installation wizard. PropertyBoss will install the database to the correct location automatically.
3. When installation is complete, you can delete the Training.exe icon from your desktop.

[Previous Step](#) | [Next Step](#)

Home > Installation Guides > Single User Installation Guide > Step 3: Create Your Production Database

Step 3: Create Your Production Database

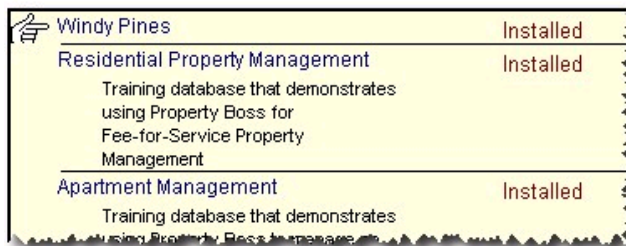
In order to use PropertyBoss, you will create at least one production database for your company. If you manage for more than one apartment community, for more than one homeowners' association, or for a combination of industries, you may need to create multiple databases. Additional information on using multiple databases is presented in the [Databases](#) section.

If you installed PropertyBoss in Evaluation mode, created your database, and entered live production data, you do not need to create a new database. After you change your installation to Single User mode, your database will still be available.

- [Instructions](#)
- [Possible Issues](#)

Instructions

1. Double-click on the PropertyBoss icon to access the list of databases window. If you have previously logged into a training database, you will get a login window. You can click Cancel on the login window to access the list of databases.



2. On the database list window, click the New button. Copy the training database that represents your industry. Do not use spaces, special characters, or the word Training in your database name. You can use an underscore to separate words in the name.



3. When complete, your database will be listed in the database list window.
4. If you will have more than one database, repeat the steps above to create each database.

Possible Issues

- If you will have more than one database, consider creating one of your databases, refining the setup preferences, and then creating the rest of your databases based on the first one. Your preferences will be copied to the additional databases.

[Previous Step](#) | [Next Step](#)

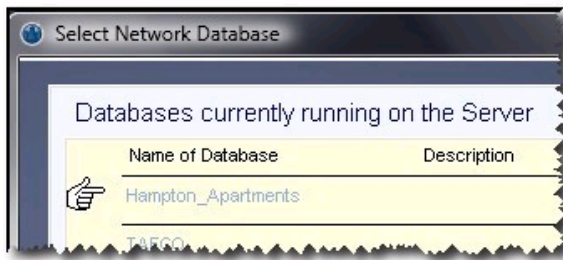
Home > Installation Guides > Single User Installation Guide > Step 4: Open Your Database and Create a Temporary License

Step 4: Open Your Database and Create a Temporary License

When you first login to your database, you will be prompted to create a 30-day temporary license. This is okay. PropertyBoss will have full functionality and you can enter your production data. Within 30 days, you will receive your permanent registration numbers from Client Care.

Instructions

1. Open PropertyBoss, select your database from the database list, and click OK to login.



2. A welcome window will open. Click OK. You will be prompted to enter contact information about your company. This information is stored in: Setup Preferences > Company Information. It is used on certain reports and letters in PropertyBoss. Click Next to continue.
3. A temporary registration window will open. Click the button to create a 30-day temporary license. A web page will open that describes temporary registration. You can close this window.



4. Create a password for the pboss user account and click OK. Pboss is an administrative user account with full access to all PropertyBoss features.
5. On the login window that opens, enter your pboss password to login to your database. Once you enter your permanent registration numbers, you will no longer have user accounts or have to login to your database.
6. If you have more than one database, repeat the steps above. You will create a 30-day temporary license for each database.

[Previous Step](#) | [Next Step](#)

Home > Installation Guides > Single User Installation Guide > Step 5: Obtain Your Permanent Registration Numbers

Step 5: Obtain Your Permanent Registration Numbers

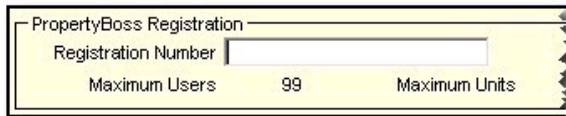
Each of the databases that you create will have a unique ID called the database key. Your permanent registration numbers are assigned based on this database key; therefore, you must create your database and provide the database key to Client Care in order for us to issue your registration numbers.

- [Types of Registration Numbers](#)
- [Instructions](#)

Types of Registration Numbers

You will receive registration numbers for the following items:

- **PropertyBoss**
This registration number allows you to login to PropertyBoss indefinitely.



PropertyBoss Registration

Registration Number

Maximum Users 99 Maximum Units

- **Add-On Products**
These registration numbers allow you to use add-on products that you purchased from PropertyBoss indefinitely. However, some add-on products are used within PropertyBoss, but are provided by 3rd party partners. Registration information will be provided for these products by the 3rd party companies. Your continued use of these products is subject to your contracts with those companies.



Optional Modules

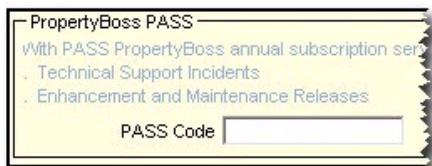
PropertyBackup

Payment-Bank Gateway

Payment-Merchant Gateway

PropertyConsolidated

- **PASS**
This registration number allows you to contact Client Care for technical support and allows you to upgrade to new releases of PropertyBoss. This registration number will remain active for one year after your initial purchase. One month before your year anniversary, you will see a message at login reminding you that it is time to renew your PASS registration. If you do not renew PASS, you will no longer have access to the PASS services (i.e. Client Care support and new releases). You will, however, continue to have access to PropertyBoss and to your add-on products.



PropertyBoss PASS

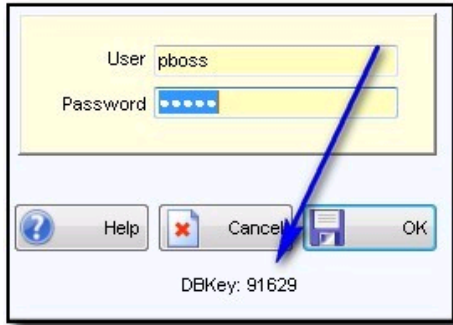
With PASS PropertyBoss annual subscription service you receive:

- Technical Support Incidents
- Enhancement and Maintenance Releases

PASS Code

Instructions

1. After you create your database, access the login window. Note your database key at the bottom of the window. (After you open PropertyBoss, the database key is also listed on the screen at: Setup Preferences > Registration Numbers.) To receive your permanent registration numbers, submit a request to Client Care: help.propertyboss.com. Be sure to include the database name and the database key for each of your databases. We cannot issue your registration numbers without this information.



2. After receiving your request and processing your payment, Client Care will email your permanent registration numbers. Enter your registration numbers in PropertyBoss: Setup Preferences > Registration Numbers.

[Previous Step](#) | [Next Step](#)

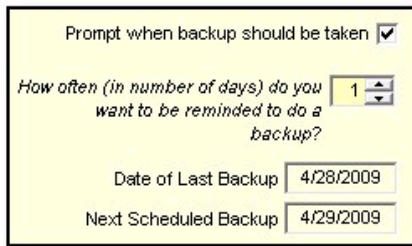
[Home](#) > [Installation Guides](#) > [Single User Installation Guide](#) > [Step 6: Schedule a Reminder to Backup Your Database](#)

Step 6: Schedule a Reminder to Backup Your Database

It is extremely important for you to backup your PropertyBoss data. In the event that your computer malfunctions, we can help you restore your PropertyBoss database to a new computer, but only if you have an available backup. The backup will not occur automatically. In this step, you will schedule a reminder to backup your database.

Instructions

1. Open your PropertyBoss database and go to: Setup Preferences > Backup Preferences. Check the box to be reminded to perform a backup. Enter a number for how often you want to receive the reminder. For example, if you want to be reminded every day, then enter the number 1. Click OK. Log out if prompted.



The screenshot shows a dialog box titled "Prompt when backup should be taken" with a checked checkbox. Below this, it asks "How often (in number of days) do you want to be reminded to do a backup?" with a spinner box set to "1". At the bottom, it shows "Date of Last Backup" as "4/28/2009" and "Next Scheduled Backup" as "4/29/2009".

2. When you log into PropertyBoss on the day of your scheduled reminder, you will get a reminder message. Click OK and the database backup window will be visible. Complete your backup. Be sure to save and/or store the backup file on a storage device other than your PropertyBoss computer. (If you store your backups on the PropertyBoss computer and the computer malfunctions, you won't have access to your backups. Preferably, take the backup out of the office to another location.



[Previous Step](#) | [Beyond Installation](#)

Home > Installation Guides > Single User Installation Guide > Beyond Installation -- Your Next Steps

Beyond Installation -- Your Next Steps

A number of factors can affect system performance. While PropertyBoss can run with the minimum requirements, your performance may not be optimal.

After installing PropertyBoss, you are ready to prepare your database for "going-live." The following list contains the most common tasks that need to be completed next. More detailed information is provided in the online help documentation.

- Complete your New Client Orientation and schedule training (if necessary). You can do this by scheduling your Orientation or Training session through our website at training.propertyboss.com
- Set your PropertyBoss go-live date (see the [Determine Your PropertyBoss Go-Live Date](#) section of the Implementation Guide)
- Enter your startup data (properties, units, leases, tenants, owners, starting balances for tenants and owners, and existing security deposits for tenants). For more guidance, refer to the [Implementation Guide](#).
- Setup your add-on products (if applicable). For further information on particular products, refer to the [Add-On Product Guides](#).
- Setup your integration to QuickBooks (if applicable). For further instruction, see the [QuickBooks Integration Guide](#).
- Adjust y

[Home](#) > [Installation Guides](#) > [Single User Installation Guide](#) > [System Requirements](#)

System Requirements

A number of factors can affect system performance. While PropertyBoss can run with the minimum requirements, your performance may not be optimal.

Operating System

- Minimum: Windows 2000
- Recommended: Windows XP or higher

Processor

- Minimum: Pentium III (1 GHz)
- Recommended: Pentium 4 or higher

Memory

- Minimum: 512 MB
- Recommended: 1 GB or more

Hard Drive Space

- Minimum: 100 MB
- Recommended: 100 MB

Internet Access

- Certain add-on products, web services, and access to the online help documentation require internet access. A connection speed of 128 kbps is required and 384 kbps is recommended.

Backup Device

- High capacity data storage unit such as a USB memory stick, CDROM, or ZIP drive.

Other Software

The following software is recommended for certain PropertyBoss features:

- Export to Excel: Microsoft Excel 2003 or higher
- Merge to Word: Microsoft Word 2003 or higher
- Online Help: Microsoft Internet Explorer recommended

Home > Installation Guides > Single User Installation Guide > Databases

Databases

Overview

PropertyBoss uses Sybase's Adaptive Server iAnywhere database as the foundation of the product. The iAnywhere database is a high performance relational database management system capable of handling both large volumes of data and large numbers of concurrent users. The database schema is the same for the standalone, network, and hosted deployments of PropertyBoss; therefore, databases can be moved between deployments without modification.

Your Database Location

Databases are stored in the PropertyBoss Data folder (typically on your C drive).

Reviewing Training Databases

PropertyBoss training databases come pre-configured with the correct settings for a variety of industries and loaded with sample property management information that makes sense for that industry. You can use the training databases as a means of exploring features without worrying about corrupting your live data. In addition, you will copy the training database that most closely resembles your industry when you create your production database. The residential and multifamily training databases install when you install PropertyBoss and do not need to be downloaded. The others can be downloaded from our web site: www.propertyboss.com > Get Started > [Downloads](#). Once a database has been downloaded and installed, it will be available in your database list when logging into PropertyBoss.

Creating Multiple Databases

You will create at least one production database for your company. Most clients only need one database because they conduct only one style of property management. However, if you manage for more than one apartment community, for more than one homeowners' association, or for a combination of industries, you may need to create multiple databases. For example:

- If you manage for more than one apartment site, you may need separate databases for each site. Multiple databases would allow you to define user security by site, thereby controlling which users can view and modify information for each site. If you do not need to control which users have access to which site's data, you can put all of your sites into one database. This will also allow you to do "roll-up" reporting on financial data, vacancies, etc. for all sites together.
- If you manage for more than one homeowners' association, you will need separate databases for each association. Multiple databases allows for reporting by association, integration with a QuickBooks file per association, and division of staff responsibilities in PropertyBoss by association. If you have several small associations, it is possible to add them all to the same database, but you **MUST** have a separate QuickBooks company file for each association.
- If you manage for a combination of industries (such as homeowners' associations and fee-based residential), you will need separate databases. PropertyBoss handles the flow of financial information differently for each industry. Therefore, a database per industry will be necessary for your reporting and QuickBooks integration to work successfully. You do not have the option to mix industries in the same database.

Home > Installation Guides > Single User Installation Guide > General Troubleshooting (Single User Version)

General Troubleshooting (Single User Version)

Possible Issues

The following items describe the most common issues encountered during installation and how to correct them. If you continue to have trouble with any item, submit a Client Care request to receive technical support: help.propertyboss.com.

- [You cannot locate the installation file for PropertyBoss](#)
- [Your PropertyBoss installation wizard stopped at approximately 90%](#)
- [During installation of PropertyBoss, you chose the wrong installation mode](#) (or think you might have)

Solutions

You cannot locate the installation file for PropertyBoss

The link for downloading the installation files is provided in your software fulfillment email. This email is sent to the primary contact in your organization. If you have already downloaded the installation file, it is not on your desktop, and you are not sure where you saved it, you can: (1) search your computer for pboss.exe or (2) download the file again and note the download location. We recommend that you download the installation file to your desktop for easy access.

Your PropertyBoss installation wizard stopped at approximately 90%

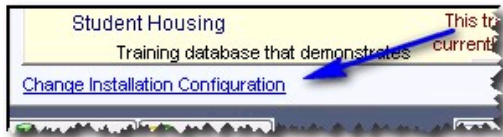
If the installation wizard for PropertyBoss stops at over 90% complete, PropertyBoss probably installed successfully. Confirm PropertyBoss will open by double-clicking on the PropertyBoss icon on your desktop. If necessary, manually add the icon to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pboss.exe and choose to send a shortcut to your desktop. If PropertyBoss opens, you can continue with your installation steps. If PropertyBoss does not open, repeat the installation steps.

During installation of PropertyBoss, you chose the wrong installation mode (or think you might have); Or, you previously installed in Evaluation mode and need to switch to Single User mode

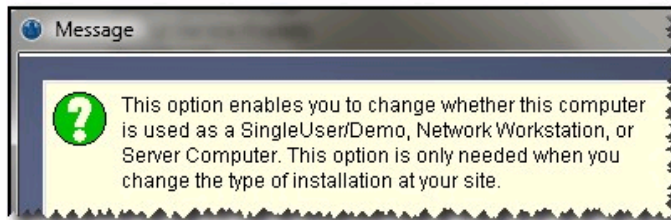
During installation, you must choose Single User as the installation mode. If you chose the wrong one or you need to switch from Evaluation installation to Single User installation, you can change the installation mode. To do so, double-click the PropertyBoss icon on your desktop. The window listing your databases will open (or try to open). Look in the bottom left corner for a blue link. You will continue based on the verbiage on the link (explained below).

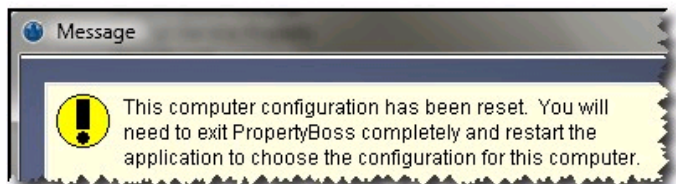
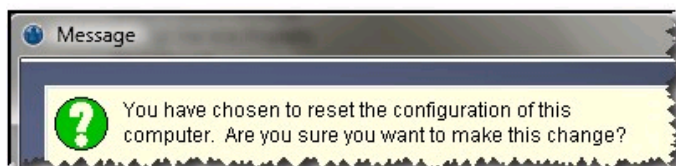
Change Installation Configuration

If the link says Change Installation Configuration, PropertyBoss could be in Evaluation or Single User mode.



To ensure that you are in Single User mode, click the link: Change Installation Configuration. A window will open describing the action you are performing. Click Yes. On the "are you sure" window, click Yes again. A window will display confirming that your previous installation mode has been reset. Click OK. The list of databases window will open. Click Cancel. Login to PropertyBoss again. You will be prompted to choose the new installation mode. Choose Single User.



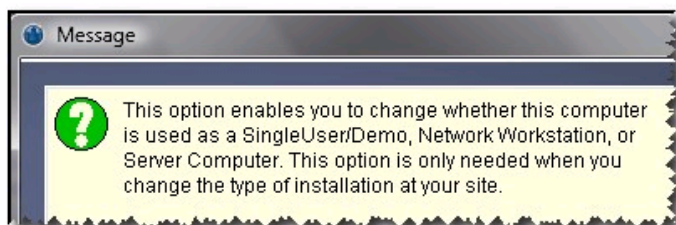
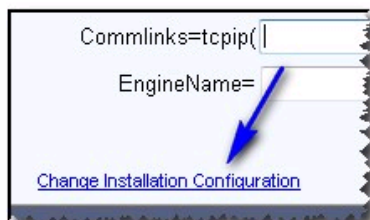
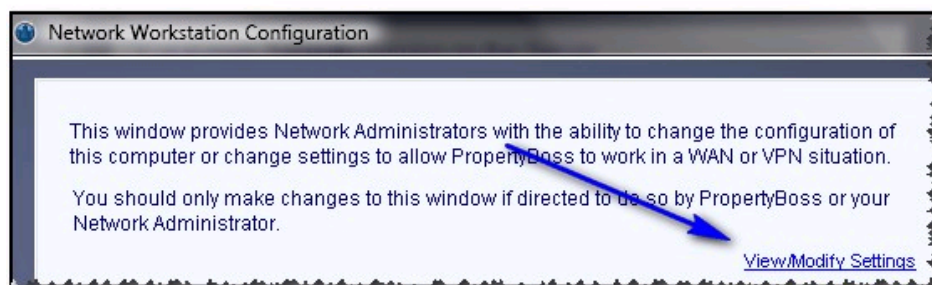


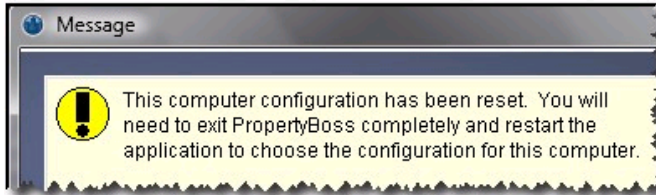
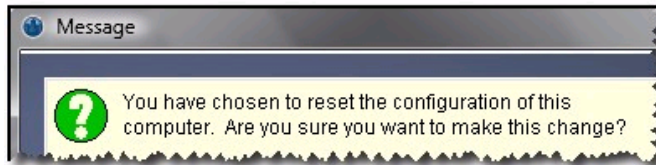
Configure this Computer

If the link Configure this Computer, PropertyBoss is in Network mode, and you need to switch to Single User mode.



Click the link: Configure this Computer. A window will open with entry fields. Skip the entry fields and click the link: View/Modify Settings. On the next window, click the link: Change Installation Configuration. A window will open describing the action you are performing. Click Yes. On the "are you sure" window, click Yes again. A window will display confirming that your previous installation mode has been reset. Click OK. Click OK again. The list of databases window will open. Click Cancel. Login to PropertyBoss again. You will be prompted to choose the new installation mode. Choose Single User.





Frequently Asked Questions

1. [What are the system requirements for installing PropertyBoss?](#)
2. [Can PropertyBoss be used by multiple user on my network?](#)
3. [Can all of my remote properties connect to PropertyBoss?](#)
4. [Where will my data be stored?](#)
5. [What version of PropertyBoss will I install?](#)
6. [Where do I install PropertyBoss?](#)
7. [How do I switch from Evaluation installation to Single User installation?](#)
8. [How do I obtain permanent registration numbers?](#)
9. [How do I get out of test mode?](#)
10. [Can I enter all of my properties and units into one database?](#)
11. [Now that I have completed installation, what do I do next?](#)

-
1. What are the system requirements for installing PropertyBoss?
Please refer to the section on [System Requirements](#) for details.
 2. Can PropertyBoss be used by multiple users on my network?
No. The single computer version of PropertyBoss does not allow multiple user accounts to be created. If you need multiple user access to PropertyBoss, you must purchase the network version of PropertyBoss and install using the Network Access installation instructions described in a separate guide.
 3. Can all of my remote properties connect to PropertyBoss?
No. The single computer access version of PropertyBoss does not allow remote properties to connect because it does not allow multiple user accounts to be created. If you need your remote properties to connect to PropertyBoss, you must purchase the web or network versions of PropertyBoss. With the web version, you do not have to install PropertyBoss at each location. Everyone accesses over the web. If all of your remote properties can already connect to a shared network, the network version of PropertyBoss allows access by multiple users at the same time. You will have to install PropertyBoss on each of the workstation computers at the remote locations.
 4. Where will my data be stored?
During installation, you will complete a step where you create your PropertyBoss database. Your data will be stored in this database. The database is typically located in a folder on your C drive C:\PropertyBoss Data.
 5. What version of PropertyBoss will I install?
Your software fulfillment email contains a download link for the most recent version of PropertyBoss. The download file usually has the version number embedded in the name. For example, pboss901.exe would indicate version 9.01 of the software. After you install PropertyBoss and log into your database, in the top left corner of the toolbar, click: Help > About PropertyBoss. Your version number will be provided on the window that displays. When an updated version of PropertyBoss is available, you will be notified in the Messages section of PropertyBoss Today your PropertyBoss "home" page. We highly recommend that you install each upgrade so that you have access to the latest features and feature updates.
 6. Where do I install PropertyBoss?
You will install PropertyBoss to the single computer from which you want to use PropertyBoss. The installation wizard defaults to the Program Files folder on the C drive. PropertyBoss will install to another location only if you change this setting during installation.
 7. How do I switch from Evaluation installation to Single User installation?
If you have already installed PropertyBoss in Evaluation mode, you will still follow the instructions in this guide for installing the Single User version. You do not need to remove or reinstall PropertyBoss. You simply need to update the installation mode to Single User. [Part C of Step One](#) provides the detailed instructions on making this change. If you have already created your database and entered live production data, you can continue using this database. All of your data will be retained.

If you want to create a new database and begin again, that is okay too. Instructions are provided in [Step Three](#).
 8. How do I obtain permanent registration numbers?
When you install PropertyBoss, you will install with a 30-day temporary license. You will create your database and send the database name and database key to Client Care. ([Step Five](#) provides instructions.) Once we receive this information and process your payment, Client Care will email your permanent registration numbers. While accessing PropertyBoss with the 30-day temporary license, you can enter your live production data and you have full access to all PropertyBoss features.
 9. How do I get out of test mode?
If you have been relocating or restoring your database, the title bar of PropertyBoss may indicate that you are in test mode. To switch to production mode, go to: Setup Preferences > Security Settings and click the *Set As Production* button on the lower right.
 10. Can I enter all of my properties and units into one database?
Typically, yes. However, there are exceptions. Please review the [Databases](#) section for detailed information.
 11. Now that I have completed installation, what do I do next?
After installing PropertyBoss, you are ready to prepare your database for "going-live." This involves entering your startup data, customizing your system preferences, etc. You can review the online documentation for instructions or arrange for implementation and training sessions with a PropertyBoss specialist. See the [Beyond Installation](#) section for a list of important tasks.

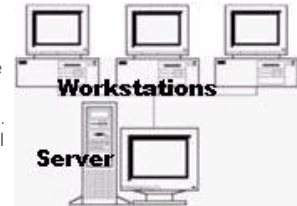
Home > Installation Guides > Network Access Installation Guide

Network Access Installation Guide

Introduction

The network version of PropertyBoss allows multiple staff members to simultaneously access your PropertyBoss data from their individual computers. To install PropertyBoss in network mode:

- You will designate one computer in your office as the PropertyBoss server computer and install two applications: (1) PB Server and (2) PropertyBoss. You will use PB Server to create your databases and make them accessible to the various users on your network.
- You will designate other computers in your office as workstation computers and install PropertyBoss to each. You will use PropertyBoss to enter and maintain your property management information. The information will be stored in your databases on the server computer.



Part A: Setup the Server Computer

1. [Download and install PB Server](#)
2. [Download and install PropertyBoss in Network - Server mode](#)
3. [Download and install the training database for your industry](#) (if necessary)
4. [Configure PB Server to run as a Windows Service](#)
5. [Create your production database](#)
6. [Log into your database and create a temporary license](#)
7. [Obtain your permanent registration numbers](#)
8. [Schedule automatic backups of your database](#)

Part B: Setup the Workstation Computers

1. [Download and install PropertyBoss in Network - Workstation mode](#)

Installation Tips

- If you are unable to complete any of the above steps, submit a request for help to Client Care: help.propertyboss.com.
- If you would like to have the software fulfillment email resent or an installation CD mailed to you, submit a Client Care request: help.propertyboss.com. (You will be billed for the installation CD.)
- If the server or workstation computers are running the Vista operating system, User Access Control (UAC) messages will periodically pop-up during installation. Always click Allow on these windows.
- If the server or workstation computers are running a firewall, warning messages will periodically pop-up during installation. Always click Unblock on these windows.

See also

[Single User Installation Guide](#)
[PropertyBoss on Mac Computers](#)
[Remote Access](#)
[Upgrade Installation Guide](#)
[Database in Test Mode](#)
[Installation Troubleshooting](#)

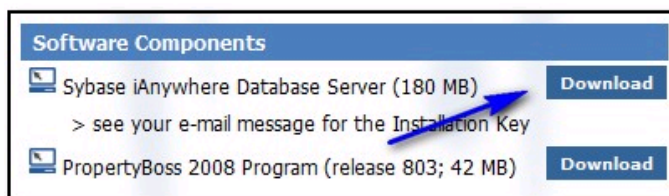
Step 1: Download and Install PB Server

To begin setup, designate one computer in your office as the PropertyBoss server computer. This will be a single computer and can be the actual server for your office network or it can be a workstation computer on your office network. Either way, this computer will store your PropertyBoss databases. Next, download and install the PB Server application to this computer. This application enables you to create your PropertyBoss databases and also makes the databases accessible to the various users on your network. If you are installing from the installation CD, skip Part A and continue with Part B below.

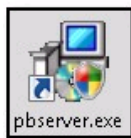
- [Part A: Download Instructions](#)
- [Part B: Installation Instructions](#)
- [Possible Issues](#)

Part A: Download Instructions

1. Click the download link in your software fulfillment email. The PropertyBoss web site will open with links for downloading several items including PB Server (Sybase iAnywhere Database Server), PropertyBoss, and helpful documentation.
2. Click the download button for Sybase iAnywhere Database Server. This is the PB Server installation file. When prompted to Run or Save, Save the file to your desktop.



3. When the download is complete, a pbserver.exe icon will appear on your desktop.



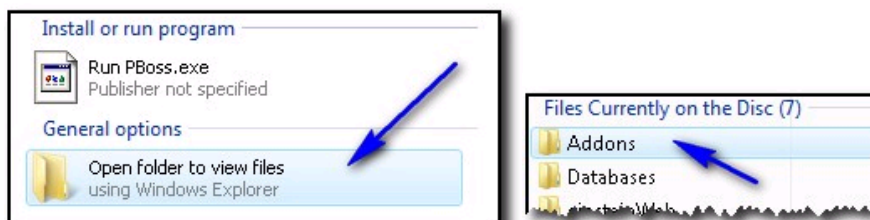
Part B: Installation Instructions

1. Shut down all programs. It is also recommended that you temporarily disable antivirus software as it could prevent various files from being updated during installation. Once installation is complete, you can re-enable your antivirus software.

If you are not familiar with networks and antivirus software, we recommend including a network professional in your installation process. A network professional will ensure that you do not leave your network vulnerable to outside attacks.

2. Double-click the pbserver.exe icon on your desktop and progress through the installation wizard.

(If you are installing from the installation CD, insert the CD and view the files on the CD. Do not run the executable as it is for PropertyBoss rather than PB Server. Open the Addons folder and then double-click the pbserver.exe file. Progress through the installation wizard.)



3. When prompted, enter the password indicated in your software fulfillment email. If you need to have the email resent, submit a Client Care request: help.propertyboss.com.
4. When installation is complete, you have installed PB Server. You can now delete the pbserver.exe icon from the desktop. (A shortcut icon to access PB Server will be added to your desktop in the next step.) In Step Four, you will configure PB Server to run as a Windows Service.

5. RESTART YOUR COMPUTER.

If you do not restart your computer, you will receive error messages in later installation steps.

Possible Issues

- If you did not save the installation file to your desktop and are not sure where to locate it, search your computer for pbserver.exe or download the file again and note the download location.

[Next Step](#)

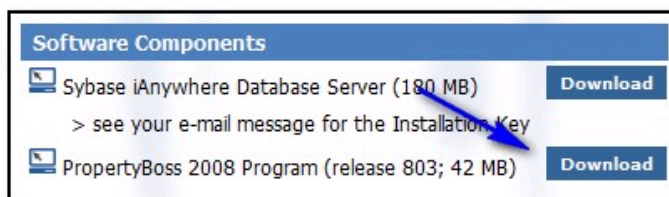
Step 2: Download and Install PropertyBoss in Network - Server Mode

In this step, download and install the PropertyBoss application to the same computer on which you just installed PB Server. Choose Network - Server as the installation mode. In a later step, you will use PropertyBoss to login to your databases and assign temporary registration numbers. If you are installing from the installation CD, skip Part A and continue with Part B below. If you have previously installed PropertyBoss to this computer in Evaluation mode or Single User mode, skip Part A and Part B and continue with Part C below.

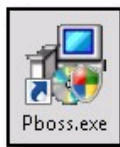
- [Part A: Download Instructions](#)
- [Part B: Installation Instructions](#)
- [Part C: Change Installation Mode Instructions](#) (only if you previously installed in Evaluation or Single User mode)
- [Possible Issues](#)

Part A: Download Instructions

1. Click the download link in your software fulfillment email. The PropertyBoss web site will open with links for downloading several items including PB Server, PropertyBoss, and helpful documentation.
2. Click the download button for PropertyBoss. On the next web page, click the download button again. When prompted to Run or Save, Save the file to your desktop.



3. When the download is complete, a pboss.exe icon will appear on your desktop. (The number in the file name represents the PropertyBoss version.)



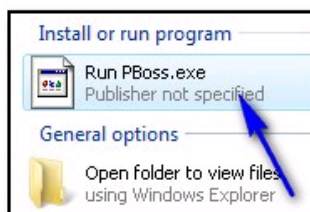
Part B: Installation Instructions

1. Shut down all programs. It is also recommended that you temporarily disable antivirus software as it could prevent various files from being updated during installation. Once installation is complete, you can re-enable your antivirus software.

If you are not familiar with networks and antivirus software, we recommend including a network professional in your installation process. A network professional will ensure that you do not leave your network vulnerable to outside attacks.

2. Double-click the pboss.exe icon on your desktop and progress through the installation wizard.

(If you are installing from the installation CD, insert the CD and run the file pboss.exe when prompted. If you are not prompted, view the files on the CD and double-click the pboss.exe file. Progress through the installation wizard.)



3. If prompted for the installation location, you can accept the default location.
4. When the installation wizard is complete, two icons will be on your desktop: (1) PropertyBoss opens the software and (2) PropertyBoss Einstein opens the online help documentation.



5. To finish installation, double-click the PropertyBoss icon. Choose Network - Server as the installation mode and click OK.

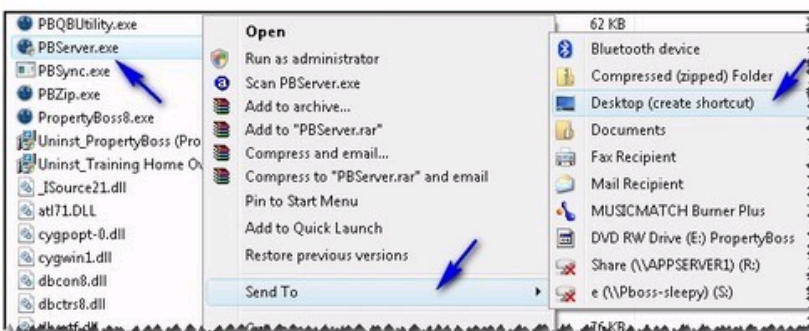


6. A database selection window may open. Close the window to close PropertyBoss. You can delete the pboss.exe icon from the desktop.
7. For non-Vista operating systems, a PBServer shortcut icon will appear on your desktop. This shortcut provides access to the PB Server program installed in the previous step.



For Vista operating systems with User Access Control (UAC) turned off, a PB server icon will appear on your desktop.

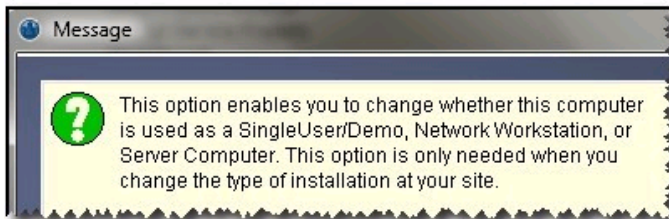
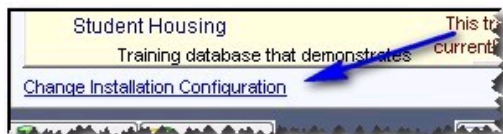
For Vista operating systems with User Access Control (UAC) turned on, PropertyBoss may not be able to create the PB Server shortcut icon on your desktop. Cancel out of the error messages that display and PropertyBoss will close. Manually add the PB Server shortcut to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pbserver.exe and choose to send a shortcut to your desktop.



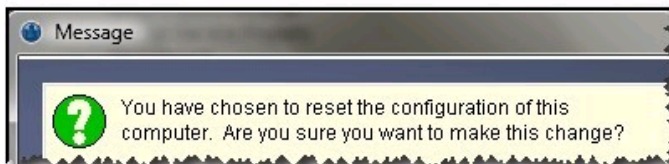
Part C: Change Installation Mode Instructions (only if you previously installed in Evaluation or Single User mode)

If you are installing PropertyBoss to this computer for the first time, you do NOT need to complete this step.

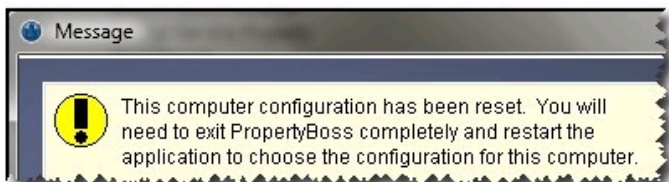
1. Double-click the PropertyBoss icon on your desktop. The window listing your databases will open.
2. In the bottom left corner of the window, click the blue link: Change Installation Configuration. A window will open describing the action you are performing. Click Yes.



3. An "are you sure" window will open. Click Yes again.



4. A window will display confirming that your previous installation mode has been reset. Click OK.

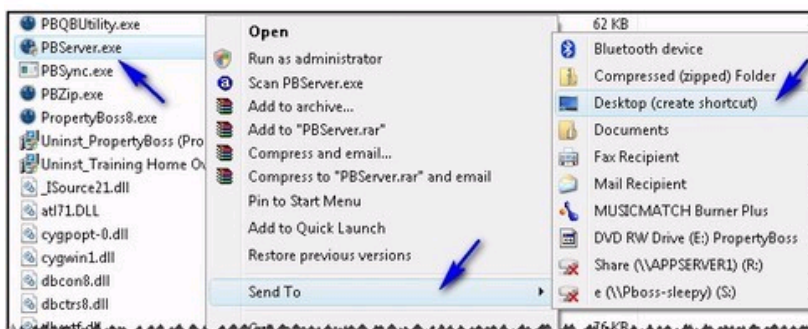


5. The list of databases window will open. Click Cancel to close this window.
 6. Double-click on the PropertyBoss icon to login to PropertyBoss again. This time, you will be prompted to choose the new installation mode. Choose Network - Server and click OK.
 7. For non-Vista operating systems, a PBServer shortcut icon will appear on your desktop. This shortcut provides access to the PB Server program installed in the previous step.



For Vista operating systems with User Access Control (UAC) turned off, a PB server icon will appear on your desktop.

For Vista operating systems with User Access Control (UAC) turned on, PropertyBoss will not be able to create the PB Server shortcut icon on your desktop. Cancel out of the error messages that display and PropertyBoss will close. Manually add the PB Server shortcut to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pbserver.exe and choose to send a shortcut to your desktop.



Possible Issues

- If you did not save the installation file to your desktop and are not sure where to locate it, search your computer for the pboss.exe file or download the file again and note the download location.
- If the installation wizard for PropertyBoss stops at over 90% complete, PropertyBoss probably installed successfully. Confirm PropertyBoss will open by double-clicking on the PropertyBoss icon on your desktop. If necessary, manually add the icon to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pboss.exe and choose to send a shortcut to your desktop.
- If you chose the wrong installation mode, you need to switch to Network - Server mode. You do not need to remove or re-install PropertyBoss. Additional instructions for switching installation modes are presented in the [General Troubleshooting](#) section.

[Previous Step](#) | [Next Step](#)

Home > Installation Guides > Network Access Installation Guide > Step 3: Download and Install the Training Database for Your Industry (if necessary)

Step 3: Download and Install the Training Database for Your Industry (if necessary)

In a later step, you will create your production database. To do so, you will copy a PropertyBoss training database pre-configured with the correct settings for your industry. If you manage homeowners' associations, student housing, or commercial properties, you need to download and install the training database for that industry so that it is available to copy when creating your production database.

If you manage multifamily or fee-based residential properties, you can skip this step. These training databases install automatically when you install PropertyBoss. If you installed from the CD, you can skip this step. All training databases install automatically when you install from the CD.

- [Part A: Download Instructions](#)
 - [Part B: Installation Instructions](#)
-

Part A: Download Instructions

1. To access the download page for training databases, go to the PropertyBoss web site: www.propertyboss.com > Get Started > [Downloads](#).
2. Click the icon for the database that represents your industry. When prompted to Run or Save, Save the file to your desktop.



3. When the download is complete, a Training.exe icon will appear on your desktop.



Part B: Installation Instructions

1. Shut down all programs.
2. Double-click the Training.exe icon on your desktop and progress through the installation wizard. PropertyBoss will install the database to the correct location automatically.
3. When installation is complete, you can delete the Training.exe icon from your desktop.

[Previous Step](#) | [Next Step](#)

Step 4: Configure PB Server to Run as Windows Service

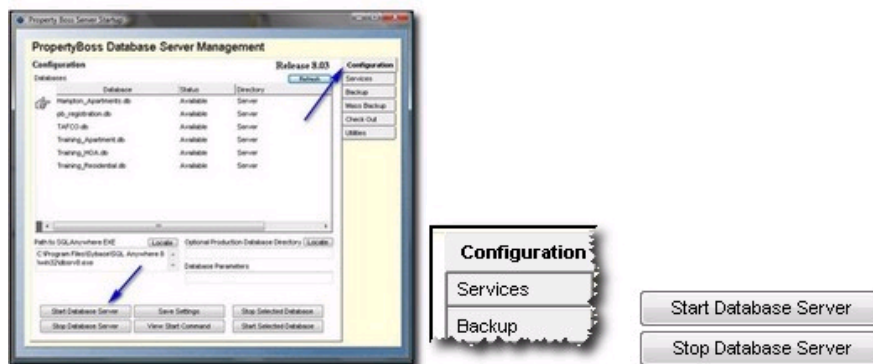
As mentioned before, PB Server is an application that enables you to create and manage your PropertyBoss databases and it also makes them accessible to your staff on their workstation computers. In this step, you will configure PB Server to run as a Windows Service. This ensures that your databases are always running and accessible when your staff logs into PropertyBoss. If you do not run PB Server as a Windows Service, your databases will stop anytime the server computer reboots or is turned off. Therefore, you will periodically have to restart PB Server to make your databases accessible.

Before continuing with this step, be sure that you restarted your computer after installing PB Server. If you did not, you will get error messages when completing the instructions below.

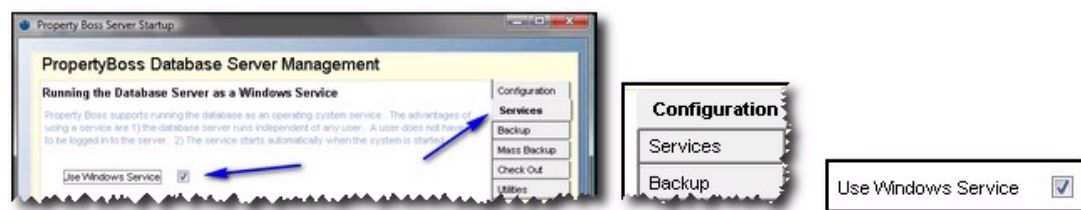
- [Instructions](#)
- [Possible Issues](#)

Instructions

1. Double-click on the PBServer icon on the desktop to open PB Server.
2. Before you can start the Windows Service, you must start and then stop the database server. On the Configuration tab, click the Start Database Server button and follow the screen prompts. Wait about one minute for the database server to make the appropriate network connections. Then click the Stop Database Server button and follow the screen prompts. Again, wait about one minute for the database server to make the appropriate network connections.



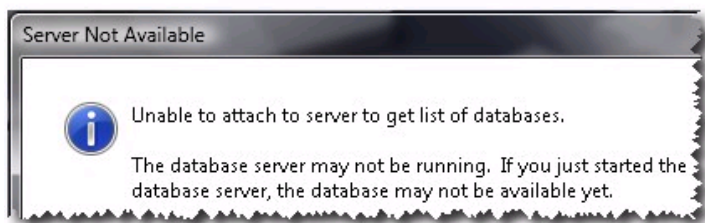
3. On the Services tab, check the Use Windows Service box. Follow the screen prompts. All databases are automatically started when you start the Windows Service.



4. Open PropertyBoss and log into one of the training databases to confirm that the service started.

Possible Issues

- If you get the error message below when opening PropertyBoss, PropertyBoss is not connected to PB Server. Since PB Server provides access to your databases, you will not get a list of training databases. To correct this issue, complete the instructions above again.



[Previous Step](#) | [Next Step](#)

Step 5: Create Your Production Database

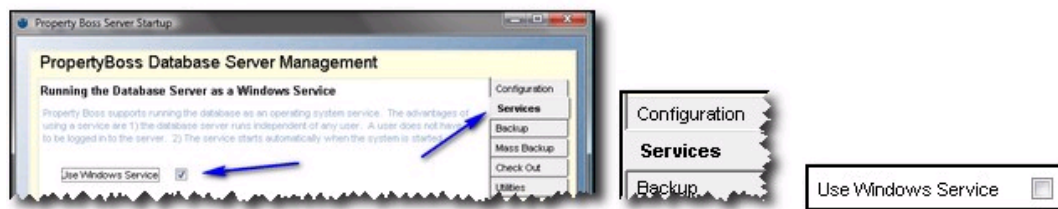
Databases are created in the PB Server program. You **MUST** stop the Windows Service before creating your database. You will create at least one production database for your company. If you manage for more than one apartment community, for more than one homeowners' association, or for a combination of industries, you may need to create multiple databases. Additional information on using multiple databases is presented in the [Databases](#) section.

If you installed PropertyBoss in Evaluation mode (on a workstation computer), created your database, and entered live production data, you do not need to create a new database. If you want to retain the data that you have already entered, you need to backup the database on the workstation computer and restore it to the PB Server computer. If you do not want to retain the data already entered, proceed with this step and create a new database.

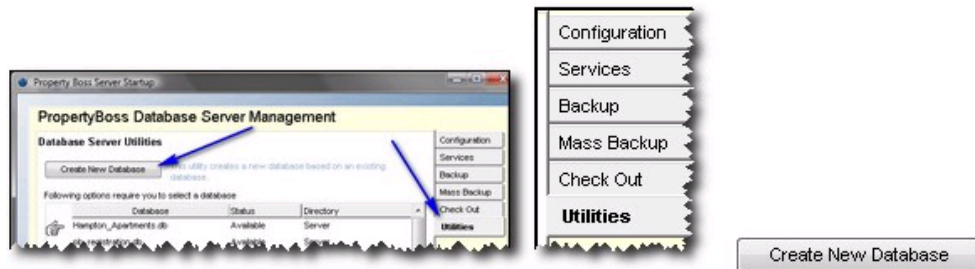
- [Instructions](#)
- [Possible Issues](#)

Instructions

1. Double-click on the PBServer icon on your desktop to open PB Server.
2. Before you create your database, you **MUST** stop the Windows Service. On the Services tab, click the button: Stop Database Service. Follow the screen prompts.



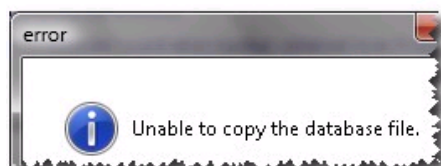
3. On the Utilities tab, click the Create New Database button. Copy the training database that represents your industry. Do not use spaces, special characters, or the word Training in your database name. You can use an underscore to separate words in the name.



4. When complete, go back to the Services tab and restart the Windows Service by clicking the button: Start Database Service. Follow the screen prompts.
5. If you will have more than one database, repeat the steps above to create each database.

Possible Issues

- If you will have more than one database, create each database before restarting the Windows Service. Or, consider creating one of your databases, refining the setup preferences, adding user accounts in PropertyBoss, and then creating the rest of your databases based on the first one. Your preferences and user accounts will be copied to the additional databases.
- If you get the error message below when creating your production database, the database you are copying is running. The database cannot be running when you complete this step. Complete instructions above again to ensure that the Windows Service is stopped.



[Previous Step](#) | [Next Step](#)

Home > Installation Guides > Network Access Installation Guide > Step 6: Log into Your Database and Create a Temporary License

Step 6: Log into Your Database and Create a Temporary License

When you first login to your database, you will be prompted to create a 30-day temporary license. This is okay. PropertyBoss will have full functionality and you can enter your production data. Within 30 days, you will receive your permanent registration numbers from Client Care.

- [Instructions](#)
- [Possible Issues](#)

Instructions

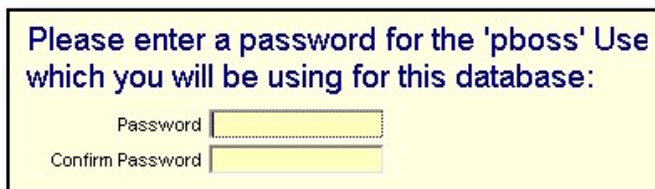
1. Open PropertyBoss, select your database from the database list, and click OK to login.



2. A login window will open. Click OK. You do not have to enter a password. You will be prompted to enter contact information about your company. This information is stored in: Setup Preferences > Company Information. It is used on certain reports and letters in PropertyBoss. Click Next to continue.
3. A temporary registration window will open. Click the button to create a 30-day temporary license. A web page will open that describes temporary registration. You can close this window.



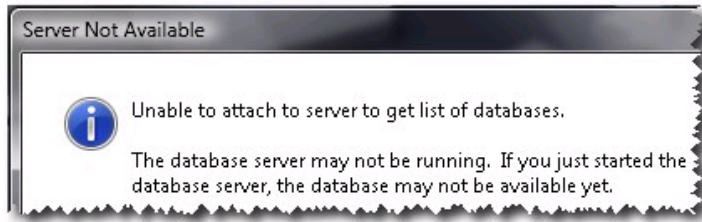
4. Create a password for the pboss user account. Pboss is an administrative user account with full access to all PropertyBoss features. Only administrative-level staff should know this password. You can change the password in PropertyBoss at any time, but you cannot delete the pboss user account.



5. On the login window, enter your pboss password to login to your database. You can create additional user accounts under: Setup Preferences > Security Settings.
6. If you have more than one database, repeat the steps above. You will create a 30-day temporary license for each database.

Possible Issues

- If you get the error message below when opening PropertyBoss, PropertyBoss is not connected to PB Server. Since PB Server provides access to your databases, you will not get a list of databases. Go back to Step Four and follow the instructions to START the Windows Service which will allow PropertyBoss to attach to PB Server.



[Previous Step](#) | [Next Step](#)

Home > Installation Guides > Network Access Installation Guide > Step 7: Obtain Your Permanent Registration Numbers

Step 7: Obtain Your Permanent Registration Numbers

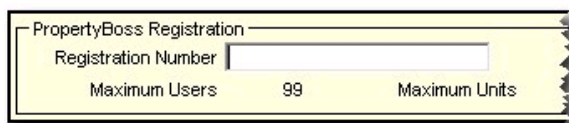
Each of the databases that you create will have a unique ID called the database key. Your permanent registration numbers are assigned based on this database key; therefore, you must create your database and provide the database key to Client Care in order for us to issue your registration numbers.

- [Types of Registration Numbers](#)
- [Instructions](#)

Types of Registration Numbers

You will receive registration numbers for the following items:

- PropertyBoss - this registration number allows you to login to PropertyBoss indefinitely.

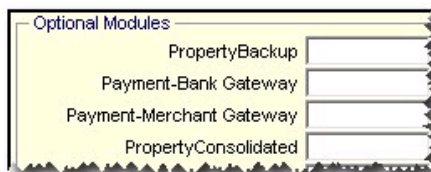


PropertyBoss Registration

Registration Number

Maximum Users 99 Maximum Units

- Add-on products - these registration numbers allow you to use add-on products that you purchased from PropertyBoss indefinitely. However, some add-on products are used within PropertyBoss, but are provided by 3rd party partners. Registration information will be provided for these products by the 3rd party companies. Your continued use of these products is subject to your contracts with those companies.



Optional Modules

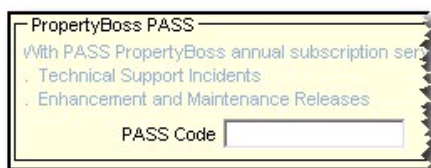
PropertyBackup

Payment-Bank Gateway

Payment-Merchant Gateway

PropertyConsolidated

- PASS - this registration number allows you to contact Client Care for technical support and allows you to upgrade to new releases of PropertyBoss. This registration number will remain active for one year after your initial purchase. One month before your year anniversary, you will see a message at login reminding you that it is time to renew your PASS registration. If you do not renew PASS, you will no longer have access to the PASS services (i.e. Client Care support and new releases). You will, however, continue to have access to PropertyBoss and to your add-on products.



PropertyBoss PASS

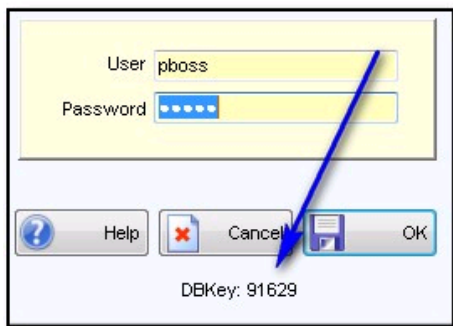
With PASS PropertyBoss annual subscription service you will receive:

- Technical Support Incidents
- Enhancement and Maintenance Releases

PASS Code

Instructions

1. After you create your database, access the login window. Note your database key at the bottom of the window. (After you login to PropertyBoss, the database key is also listed on the screen at: Setup Preferences > Registration Numbers.) To receive your permanent registration numbers, submit a request to Client Care: help.propertyboss.com. Be sure to include the database name and the database key for each of your databases. We cannot issue your registration numbers without this information.



2. After receiving your request and processing your payment, Client Care will email your permanent registration information. Enter your registration numbers in PropertyBoss: Setup Preferences > Registration Numbers.

[Previous Step](#) | [Next Step](#)

Step 8: Schedule Automatic Backups of Your Database

It is extremely important for you to backup your PropertyBoss data. In the event that your PropertyBoss server computer malfunctions, we can help you restore your PropertyBoss databases to a new computer, but only if you have an available backup.

PropertyBoss databases WILL NOT be backed up by the automated software that backups your network. The software will skip the PropertyBoss databases because the files are running. Therefore, you must schedule the PB Server application to backup your databases to a designated place on your network. This will create a file that is not running and that your regular network backup can save to tape or other medium. If you schedule PB Server to perform a backup immediately before your regular network backup, you will always have a snapshot of your PropertyBoss data that is just prior to the time of your network backup. If run on a daily basis, the backup will create a folder for each day of the week, and you will always have up to seven days of backups. Periodically check your backup folders to ensure that your automated backups are working successfully.

- [Part A: Configure PB Server for Backups](#)
- [Part B: Define Your Backup Schedule](#) (XP Operating Systems)
- [Part C: Define Your Backup Schedule](#) (Vista Operating Systems)

Part A: Configure PB Server for Backups

1. Create a folder on your network for storing PropertyBoss backups. Open PB Server and ensure that your Windows Service is running. DO NOT stop the service for this activity.
2. Click the Mass Backup tab and the Locate button. Then navigate to the folder you created for storing backups. Check the Compress Database after backup. This is recommended since PropertyBoss expects a ZIP file in the event that you need to restore to a backup.
3. Click the Mass Backup Now button. All databases will be stored in your backup location. This initial manual backup is required to save your backup settings.



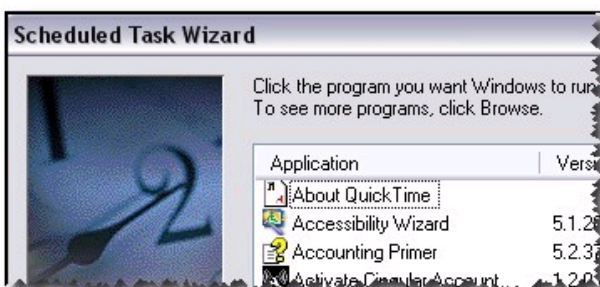
4. If your operating system is XP, continue with Part B below. If your operating system is Vista, continue with Part C below.

Part B: Define Your Backup Schedule (XP Operating Systems)

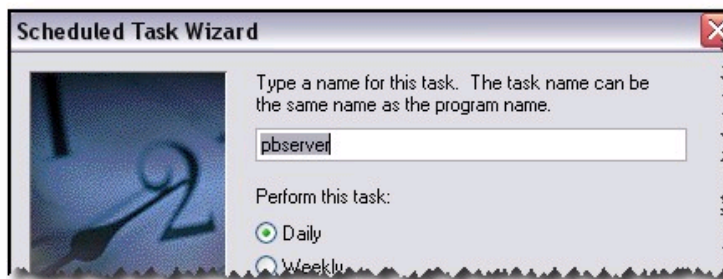
1. Open windows scheduler by clicking on: Start > Programs > Accessories > System Tools > Scheduled Tasks.
2. Click the Add Scheduled Task button and progress through the wizard.



3. When prompted, click the Browse button and locate the file pbserver.exe. If you installed PB Server to the default location, this file will be at: C:/Program Files/PropertyBoss.



- When prompted, you can leave the default name of the task (pbserver) and pick the frequency of the backup that you want to perform. The schedule that you define will be based on the frequency chosen.



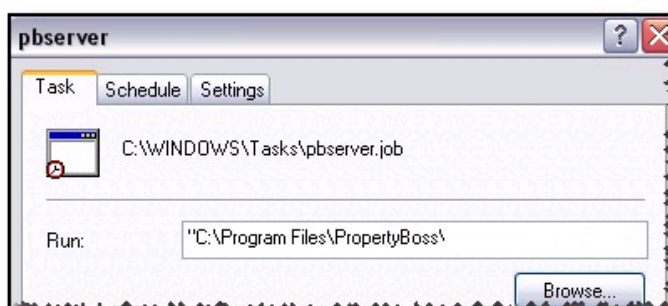
- When prompted for a user name and password, you can enter the name and password for any user of the computer. The user account should have administrative rights.



- On the last window of the wizard, check the Open Advanced Properties box and click the Finish button. A window will open with your task name in the title bar (pbserver).



- Locate the Run field. At the end of the text (after the double-quote), add a blank space and the word backup. Then click the OK button. Your automated backups are now scheduled.

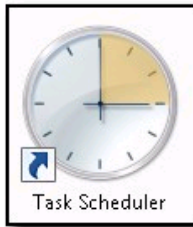


- Verify that the backup runs successfully. On the window that opens when you click OK, right-click on the task and choose Run. When the backup

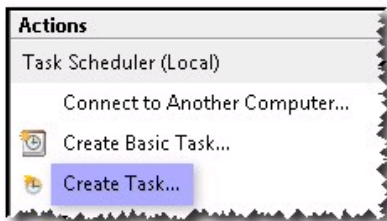
is complete, review your backup folder and verify that the backup was created. Go ahead and restore the backup to ensure that the file will restore successfully. Periodically review your backup folders to ensure that your automated backups are being created successfully.

Part C: Define Your Backup Schedule (Vista Operating Systems)

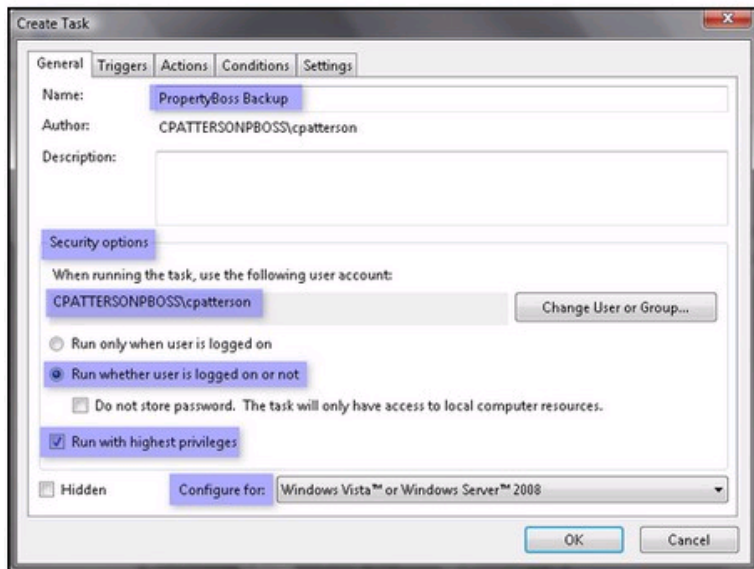
1. Open windows scheduler by clicking on: Start > Control Panel. Ensure that you are not in Classic View. Remain on the Control Panel Home. Then click: System and Maintenance > Administrative Tools. A new window will open. Double-click Task Scheduler.



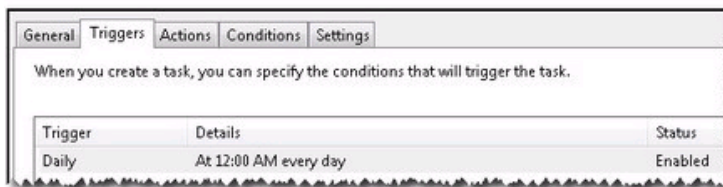
2. Click the Create Task action and progress through the wizard.



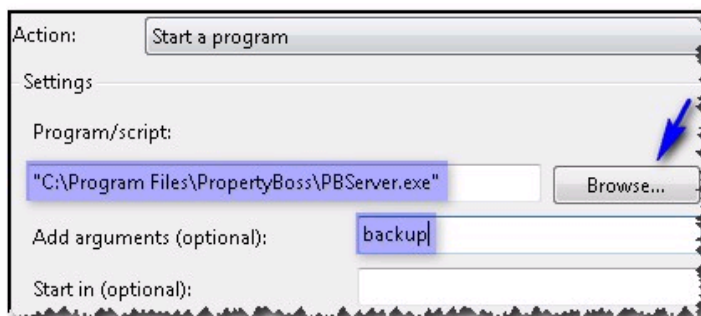
3. On the General tab, enter information similar to the image below. The most important aspect of the information entered relates to permissions. The user account that you pick for running the task should have administrative rights. Ensure that the Configure for is set to: Windows Vista or Windows Server 2008.



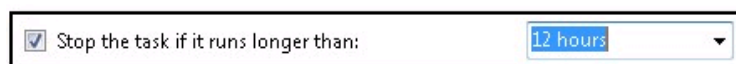
4. Click the Triggers tab and then the New button. A new window will open. Define a schedule for the task (i.e. for your backups). We recommend that you run your backup daily just before your regular network backup. When your schedule is complete, click OK and return to the Triggers tab.



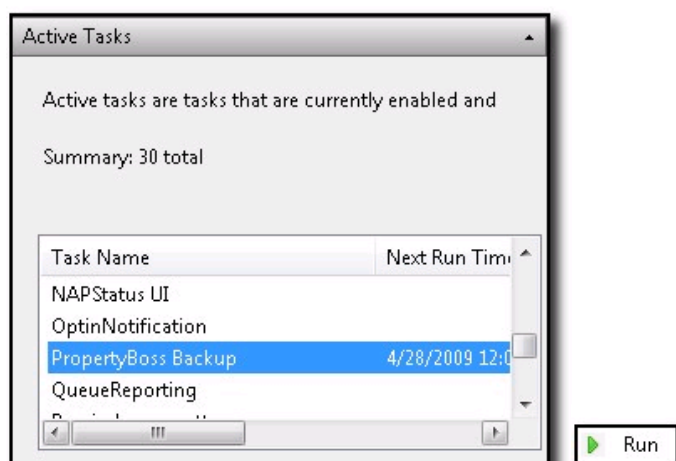
5. Click the Actions tab and then the New button. A new window will open. Click the Browse button and locate the file pbserver.exe. If you installed PB Server to the default location, this file will be at: C:/Program Files/PropertyBoss. Also, enter backup in the Add Arguments field. Click OK and return to the Actions tab.



6. Click the Settings tab. Choose to stop the task if it runs longer than 12 hours. Click OK and the window will close. Your automated backups are now scheduled.



7. Verify that the backup runs successfully. On the task scheduler window (that remains open when you click OK), scroll down in the middle pane and locate the category called Active Tasks. Scroll down in the Active Tasks list and find the PropertyBoss Backup task. Double-click the PropertyBoss Backup task and it will load in the middle pane. Under the Actions list on the right, click the Run button.



When the backup is complete, review your backup folder and verify that the backup was created. Go ahead and restore the backup to ensure that the file will restore successfully (see the [Backup and Restore](#) section found in the Daily User Guide). Periodically review your backup folders to ensure that your automated backups are being created successfully.

[Previous Step](#) | [Next Step](#)

Home > Installation Guides > Network Access Installation Guide > Step 9: Download and Install PropertyBoss in Network - Workstation Mode

Step 9: Download and Install PropertyBoss in Network - Workstation Mode

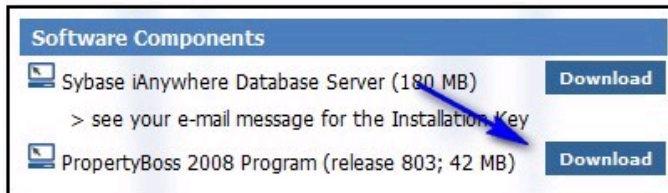
Now that you have completed installation on the PropertyBoss server computer, you need to install the PropertyBoss application on every computer from which your staff will access PropertyBoss. You can install PropertyBoss on as many computers as needed. Additionally, you can setup as many user accounts as needed. Your only limitation is how many of the user accounts can login at the same time. This number was determined by your purchase agreement and was included in your purchase price.

In this step, you will choose Network - Workstation as the installation mode. Every workstation computer will access the PropertyBoss databases stored on the PropertyBoss server computer. Please note that all workstation computers must run the same version of PropertyBoss as the PropertyBoss server computer. If you are installing from the installation CD, skip Part A and continue with Part B below. If you have previously installed PropertyBoss to this computer in Evaluation mode or Single User mode, skip Part A and Part B and continue with Part C below.

- [Part A: Download Instructions](#)
- [Part B: Installation Instructions](#)
- [Part C: Change Installation Mode Instructions](#) (only if you previously installed in Evaluation or Single User mode)
- [Possible Issues](#)

Part A: Download Instructions

1. Click the download link in the software fulfillment email. The PropertyBoss web site will open with links for downloading several items including PB Server, PropertyBoss, and helpful documentation.
2. Click the download button for PropertyBoss. On the next web page, click the download button again. When prompted to Run or Save, Save the file to your desktop.



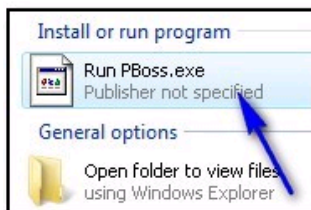
3. When the download is complete, a pboss.exe icon will appear on your desktop. (The number in the file name represents the PropertyBoss version.)



Part B: Installation Instructions

1. Shut down all programs.
2. Double-click the pboss.exe icon on your desktop and progress through the installation wizard.

(If you are installing from the installation CD, insert the CD and run the file pboss.exe when prompted. If you are not prompted, view the files on the CD, double-click the pboss.exe file, and progress through the installation wizard.)

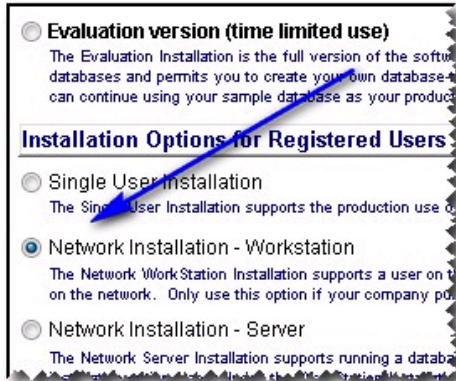


3. If prompted for the installation location, you can accept the default location.

- When the installation wizard is complete, two icons will appear on your desktop: (1) PropertyBoss opens the software and (2) PropertyBoss Einstein opens the online help documentation.



- To complete installation, double-click the PropertyBoss icon. Choose Network - Workstation as the installation mode and click OK.



- A database selection window will open. Log into your database to ensure that the workstation has access to PB Server. You can delete the pboss.exe icon from your desktop.

Part C: Change Installation Mode Instructions (only if you previously installed in Evaluation or Single User mode)

If you are installing PropertyBoss to this computer for the first time, you do NOT need to complete this step.

- Double-click the PropertyBoss icon on your desktop. The window listing your databases will open.
- In the bottom left corner of the window, click the blue link: Change Installation Configuration. A window will open describing the action you are performing.
- Click Yes. An "are you sure" window will open.
- Click Yes again. A window will display confirming that your previous installation mode has been reset.
- Click OK. The list of databases window will open. Click Cancel to close this window.
- Double-click on the PropertyBoss icon to login to PropertyBoss again. This time, you will be prompted to choose the new installation mode. Choose Network - Workstation and click OK.
- If you have already created your database in Evaluation mode and entered live production data on the workstation computer, you need to backup the database on that computer and restore it to the PB Server computer (if you want to retain the data). If you do not want to retain the data, you created a new database on the PB Server computer during the installation process.

Possible Issues

- If you did not save the installation file to your desktop and are not sure where to locate it, search your computer for the pboss.exe file or download the file again and note the download location.
- If the installation wizard for PropertyBoss stops at over 90% complete, PropertyBoss probably installed successfully. Confirm PropertyBoss will open by double-clicking on the PropertyBoss icon on your desktop. If necessary, manually add the icon to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pboss.exe and choose to send a shortcut to your desktop.
- If you chose the wrong installation mode, you need to switch to Network - Workstation mode. You do not need to remove or re-install PropertyBoss. Additional instructions for switching installation modes are presented in the [General Troubleshooting](#) section.

[Previous Step](#) | [Beyond Installation](#)

Home > Installation Guides > Network Access Installation Guide > Beyond Installation--Your Next Steps

Beyond Installation--Your Next Steps

After installing PropertyBoss, you are ready to prepare your database for "going-live." The following list contains the most common tasks that need to be completed next. More detailed information is provided in the online help documentation.

- Complete your New Client Orientation and schedule training (if necessary). You can do this by scheduling your Orientation or Training session through our website at training.propertyboss.com
- Set your PropertyBoss go-live date (see the [Determine Your PropertyBoss Go-Live Date](#) section of the Implementation Guide)
- Enter your startup data (properties, units, leases, tenants, owners, starting balances for tenants and owners, and existing security deposits for tenants). For more guidance, refer to the [Implementation Guide](#).
- Setup your add-on products (if applicable). For further information on particular products, refer to the [Add-On Product Guides](#).
- Setup your integration to QuickBooks (if applicable). For further instruction, see the [QuickBooks Integration Guide](#).
- Adjust your system preferences. More information can be found in

[Home](#) > [Installation Guides](#) > [Network Access Installation Guide](#) > [System Requirements](#)

System Requirements

A number of factors can affect system performance. While PropertyBoss can run with the minimum requirements, your performance may not be optimal.

Operating System

- Minimum: Windows 2000
- Recommended: Windows XP or higher

Processor

- Minimum: Pentium III (1 GHz)
- Recommended: Pentium 4 or higher

Memory

- Minimum: 512 MB
- Recommended: 1 GB or more

Hard Drive Space

- Minimum: 100 MB
- Recommended: 100 MB

Internet Access

- Certain add-on products, web services, and access to the online help documentation require internet access. A connection speed of 128 kbps is required and 384 kbps is recommended.

Backup Device

- High capacity data storage unit such as a USB memory stick, CDROM, or ZIP drive.

Other Software

The following software is recommended for certain PropertyBoss features:

- Export to Excel: Microsoft Excel 2003 or higher
- Merge to Word: Microsoft Word 2003 or higher
- Online Help: Microsoft Internet Explorer recommended

Home > Installation Guides > Network Access Installation Guide > Network Configurations

Network Configurations

Client Server Network

Client-server networks are networks in which at least one computer is dedicated to sharing files, printers, or other resources. By definition, this type of network consists of at least two computers: the server computer and the workstation computer. The workstation runs the PropertyBoss application. The server runs PB Server and enables access to your PropertyBoss databases.

- **With a Dedicated Server**
Installations that have a large volume of users and/or transactions typically have a dedicated server on the network. The dedicated server computer runs PB Server and PropertyBoss. However, PropertyBoss is not used for day-to-day data entry. Each workstation computer runs PropertyBoss and is used for day-to-day data entry. The workstations communicate across the network to PB Server on the dedicated server.
- **With a Non-Dedicated Server**
Most installations with two or three users do not have a dedicated server on the network. In this scenario, PB Server is installed on the computer that is the most powerful, has the least usage, and the most memory. The more memory, the faster PropertyBoss will run. This computer also runs PropertyBoss and is used for day-to-day data entry. You will still install and use PropertyBoss on other workstation computers as well. The workstations will communicate across the network to PB Server on the non-dedicated server computer.

Peer-to-Peer Network

Peer-to-peer networks are networks that do not have a dedicated machine defined as a server. In this configuration, all the computers on the network have the option to share their resources. A simple example of a peer-to-peer network is two or more computers connected through a router/hub.

In a peer-to-peer network, each computer will run PropertyBoss installed as Network - Workstation. You must choose one computer to host the PropertyBoss database. The computer that you choose should be accessible from all computers needing to use PropertyBoss. You might want to put the database on the computer of the person who most frequently uses PropertyBoss. This enables that person to have the fastest access to the information in the database.

Network Requirements

The office network must meet the following requirements:

- **Client-Server Networks**
Windows 2000 Server or Windows Server 2003. PropertyBoss will not operate on Windows NT.
- **Peer-to-Peer Networks**
Windows XP users must have at least standard user rights and Windows 2000 should have power user group rights. Users who are granted restricted user access do not have the operating system rights to write to the registry keys and will not be able to use PropertyBoss.
- **Windows 98 and Windows NT Users**
PropertyBoss will not operate on Windows 98 and Windows NT. You must upgrade the operating system in order to use PropertyBoss.

Home > Installation Guides > Network Access Installation Guide > Databases

Databases

Overview

PropertyBoss uses Sybase's Adaptive Server iAnywhere database as the foundation of the product. The iAnywhere database is a high performance relational database management system capable of handling both large volumes of data and large numbers of concurrent users. The database schema is the same for the standalone, network, and hosted deployments of PropertyBoss; therefore, databases can be moved between deployments without modification.

Your Database Location

On the network version, databases are typically stored in the PropertyBoss Data folder, but they can be stored in other locations separate from PropertyBoss. If doing so, the databases must be located on the same computer as the Sybase Database software for integrity and performance issues.

Reviewing Training Databases

PropertyBoss training databases come pre-configured with the correct settings for a variety of industries and loaded with sample property management information that makes sense for that industry. You can use the training databases as a means of exploring features without worrying about corrupting your live data. In addition, you will copy the training database that most closely resembles your industry when you create your production database. The residential and multifamily training databases install when you install PropertyBoss and do not need to be downloaded. The others can be downloaded from our web site: www.propertyboss.com > Get Started > [Downloads](#). Once a database has been downloaded and installed, it will be available in your database list when logging into PropertyBoss.

Creating Multiple Databases

You will create at least one production database for your company. Most clients only need one database because they conduct only one style of property management. However, if you manage for more than one apartment community, for more than one homeowners' association, or for a combination of industries, you may need to create multiple databases. For example:

- If you manage for more than one apartment site, you may need separate databases for each site. Multiple databases would allow you to define user security by site, thereby controlling which users can view and modify information for each site. If you do not need to control which users have access to which site's data, you can put all of your sites into one database. This will also allow you to do "roll-up" reporting on financial data, vacancies, etc. for all sites together.
- If you manage for more than one homeowners' association, you will need separate databases for each association. Multiple databases allows for reporting by association, integration with a QuickBooks file per association, and division of staff responsibilities in PropertyBoss by association. If you have several small associations, it is possible to add them all to the same database, but you **MUST** have a separate QuickBooks company file for each association.
- If you manage for a combination of industries (such as homeowners' associations and fee-based residential), you will need separate databases. PropertyBoss handles the flow of financial information differently for each industry. Therefore, a database per industry will be necessary for your reporting and QuickBooks integration to work successfully. You do not have the option to mix industries in the same database.

Home > Installation Guides > Network Access Installation Guide > General Troubleshooting (Network Version)

General Troubleshooting (Network Version)

Possible Issues

The following items describe the most common issues encountered during installation and how to correct them. If you continue to have trouble with any item, submit a Client Care request to receive technical support: help.propertyboss.com.

- [You cannot locate the installation file for PB Server and/or PropertyBoss](#)
- [You don't have the installation password for PB Server](#)
- [Your PropertyBoss installation wizard stopped at approximately 90%](#)
- [You get an error message that PropertyBoss is unable to attach to the server](#)
- [During installation of PropertyBoss to the server or workstation computer, you chose the wrong installation mode \(or think you might have\)](#)
- [You need to switch from Evaluation installation to Network installation](#)

Solutions

You cannot locate the installation file for PB Server and/or PropertyBoss

The link for downloading the installation files is provided in your software fulfillment email. This email is sent to the primary contact in your organization. If you have already downloaded the installation file, it is not on your desktop, and you are not sure where you saved it, you can: (1) search your computer for pbserver.exe or pboss.exe or (2) download the file again and note the download location. We recommend that you download the installation file to your desktop for easy access.

You don't have the installation password for PB Server

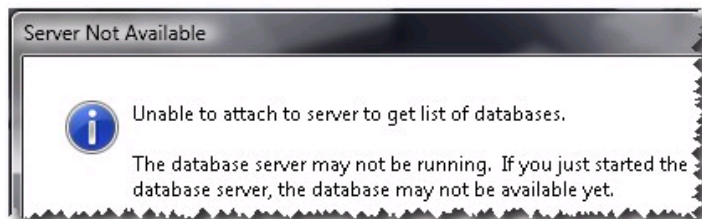
The installation password is provided in your software fulfillment email. This email is sent to the primary contact in your organization. If you need to have the email resent, submit a Client Care request: help.propertyboss.com.

Your PropertyBoss installation wizard stopped at approximately 90%

If the installation wizard for PropertyBoss stops at over 90% complete, PropertyBoss probably installed successfully. Confirm PropertyBoss will open by double-clicking on the PropertyBoss icon on your desktop. If necessary, manually add the icon to your desktop by going to C:/Program Files/PropertyBoss. Right-click on pboss.exe and choose to send a shortcut to your desktop. If PropertyBoss opens, you can continue with your installation steps. If PropertyBoss does not open, repeat the installation steps.

You get an error message that PropertyBoss is unable to attach to the server

PB Server provides access to your databases. If you get the error message below, your server is not running; therefore, the server cannot provide the list of databases. You need to open the PB Server application and start the Windows Service, which will start your server. Instructions are provided in [Step Four](#). If you continue to have trouble connecting to PB Server, review the information in the [Advance Troubleshooting](#) section.



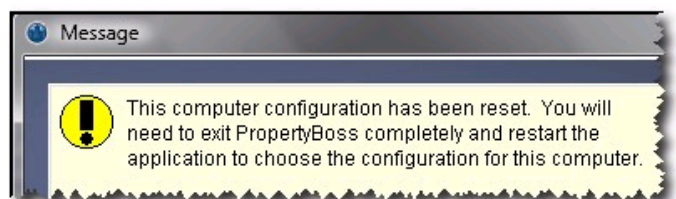
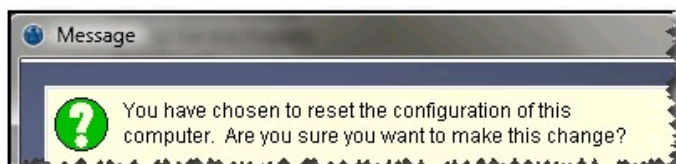
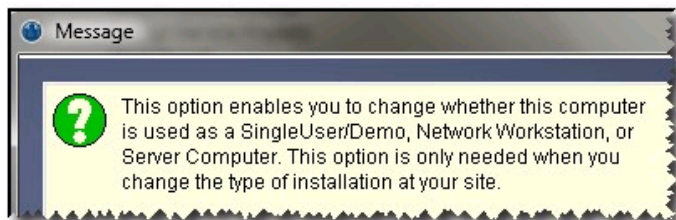
During installation of PropertyBoss to the server or workstation computer, you chose the wrong installation mode (or think you might have); Or, you previously installed in Evaluation mode and need to switch to Network-Server or Network-Workstation mode. During installation, you must choose Network - Server as the installation mode for the server computer and Network - Workstation for each workstation computer. If you chose the wrong one or you need to switch from Evaluation installation to Network installation, you can change the installation mode. To do so, double-click the PropertyBoss icon on your desktop. The window listing your databases will open (or try to open). Look in the bottom left corner for a blue link. You will continue based on the verbiage on the link (explained below).

Change Installation Configuration

If the link says Change Installation Configuration, PropertyBoss is in Evaluation or Single User mode. Your database may or may not be available in the database list. If it is available and you enter data in this mode, the data will be stored in a database on this computer only and will not be available to other users on your network.



To switch to Network mode, click the link: Change Installation Configuration. A window will open describing the action you are performing. Click Yes. On the "are you sure" window, click Yes again. A window will display confirming that your previous installation mode has been reset. Click OK. The list of databases window will open. Click Cancel. Login to PropertyBoss again. You will be prompted to choose the new installation mode. Choose either Network - Server or Network - Workstation, depending on which computer you are updating.



Once you make the changes to the installation mode, you may get an error message indicating that PropertyBoss cannot connect to the server to get a list of databases. You need to go to the PB Server application and start the Windows Service. Instructions are provided in [Step Four](#) of the installation steps.

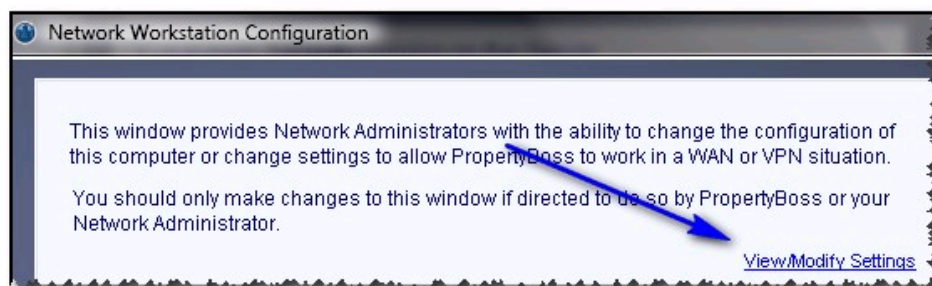
If you are using the Vista operating system and you choose Network - Server as the installation mode, you may get an error message that shuts down PropertyBoss. PropertyBoss is trying to create a shortcut to the PB Server program on your desktop. Cancel out of the error messages and manually add the PB Server shortcut by going to C:/Program Files/PropertyBoss. Right-click on pbserver.exe and choose to send a shortcut to your desktop.

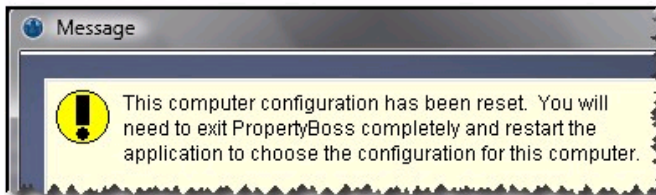
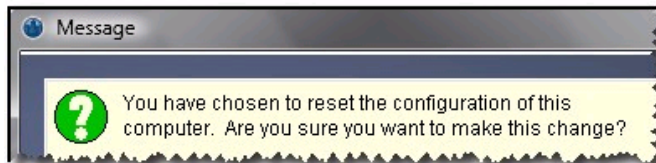
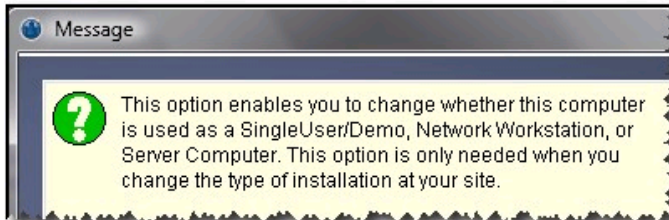
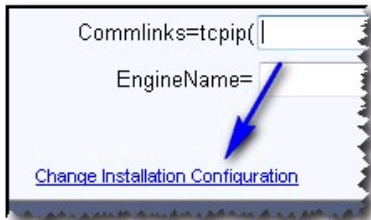
Configure this Computer

If the link says Configure this Computer, PropertyBoss is in Network mode, but you may still need to change between Network - Server and Network - Workstation.



Click the link: Configure this computer. A window will open with entry fields. Skip the entry fields and click the link: View/Modify Settings. On the next window, click the link: Change Installation Configuration. A window will open describing the action you are performing. Click Yes. On the "are you sure" window, click Yes again. A window will display confirming that your previous installation mode has been reset. Click OK. Click OK again. The list of databases window will open. Click Cancel. Login to PropertyBoss again. You will be prompted to choose the new installation mode. Choose either Network - Server or Network - Workstation, depending on which computer you are updating.





Once you make the changes to the installation mode, you may get an error message indicating that PropertyBoss cannot connect to the server to get a list of databases. You need to go to the PB Server application and start the Windows Service. Instructions are provided in Step Four of the installation steps. If you are using the Vista operating system and you choose Network - Server as the installation mode, you may get an error message that shuts down PropertyBoss. PropertyBoss is trying to create a shortcut to the PB Server program on your desktop. Cancel out of the error messages and manually add the PB Server shortcut by going to C:/Program Files/PropertyBoss. Right-click on pbserver.exe and choose to send a shortcut to your desktop.

You need to switch from Evaluation installation to Network installation
See instructions above.

Home > Installation Guides > Network Access Installation Guide > Advanced Troubleshooting

Advanced Troubleshooting

Issue: PropertyBoss Cannot Connect to the Server

While the installation of PropertyBoss is straightforward for most network configurations, it can be more involved for complex networks. If you are having trouble getting PropertyBoss to communicate with PB Server and you utilize firewalls, internet security software, network segments, WANs, and/or VPNs, advanced troubleshooting instructions are provided below.

If you are not familiar with installing software in a network environment, we recommend that a network professional install the network version of PropertyBoss. Additionally, you do not want to leave your network vulnerable to outside attacks; therefore, we strongly recommend that you involve a network professional in the following troubleshooting processes.

- [Solution 1: For Windows Service Issues](#)
- [Solution 2: For Firewall and Internet Security Software Issues](#)
- [Solution 3: For Network Segment, WAN, and VPN Issues](#)

Solution 1: For Windows Service Issues

Before troubleshooting the more advanced issues, complete the installation instructions described in [Step Four](#) to ensure that the Windows Service is running. After you restart the Windows Service, open PropertyBoss on the PB Server computer. If PropertyBoss connects to PB Server, open PropertyBoss on each of the workstation computers. If PropertyBoss connects to PB Server, you are now installed correctly. If PropertyBoss does not connect to PB Server on the server computer and/or on the workstation computers, continue with the troubleshooting sections below.

Solution 2: For Firewall and Internet Security Software Issues

PB Server broadcasts availability messages using TCP/IP over port 2638. When opened, PropertyBoss looks for these messages to determine where to locate your databases. If the broadcast messages are found, PropertyBoss connects to your databases. If the broadcast messages are not found, PropertyBoss displays a message to inform you that it cannot connect to the server to get a list of databases. If you are using firewall or internet security software on the PB Server or workstation computers, the software could be blocking the broadcast messages from PB Server to PropertyBoss by blocking: (1) port 2638 specifically or (2) the PB Server application in general. To test for this situation, temporarily deactivate your protection software on the server and workstation computers one at a time. After each deactivation, open PropertyBoss and determine if you can connect to PB Server and get a list of databases. If you can connect when your software protection is off, you will need to update the software settings to allow dbsrv8.exe to communicate externally via port 2638 when the software is on. If you need assistance with this procedure, contact a network professional. The PropertyBoss staff is not able to support other software products that may be running on your network. Additionally, a network professional can ensure that your network is not being made vulnerable to attacks.

Solution 3: For Network Segment, WAN, and/or VPN Issues

If PB Server is on a separate network segment from PropertyBoss or communicating with PropertyBoss via WAN or VPN, the workstation computers cannot see the broadcast messages from PB Server until you tell PropertyBoss where to locate PB Server. Define this information in PropertyBoss as follows:

- Determine the name and IP address of the server computer. On the database server, open the DOS CMD window by clicking Start > Run. Type CMD and press Enter. Type ipconfig and press Enter. Note the IP address of the server. Right-click on My Computer and choose Properties. Click on Computer Name. Note the full computer name.
- Modify communication parameters between PropertyBoss and PB Server. Hold down the Shift key and double-click the PropertyBoss icon. Continue to hold the shift key until the Select Database window opens. Click Configure this Computer at the bottom of the window. Click View/Modify Settings. Specify the IP Address or Computer Name in tcpip= using the format: For Computer Name, enter Host= (enter the computer name). For IP Address, enter IP= (enter the IP address). Click OK. Once you can connect, repeat these steps on each workstation computer.

Frequently Asked Questions

1. [What are the system requirements for installing PropertyBoss?](#)
2. [Can PropertyBoss be used by multiple user on my network?](#)
3. [Can all of my remote properties connect to PropertyBoss?](#)
4. [Where will my data be stored?](#)
5. [What version of PropertyBoss will I install?](#)
6. [Where do I install PB Server and PropertyBoss?](#)
7. [Do install the PB Server program before the PropertyBoss program?](#)
8. [How do I switch from Evaluation installation to Network installation?](#)
9. [How do I obtain permanent registration numbers?](#)
10. [How do I get out of Test mode?](#)
11. [Can I enter all of my properties and units into one database?](#)
12. [Now that I have completed installation, what do I do next?](#)

1. What are the system requirements for installing PropertyBoss?
Please refer to the section on [System Requirements](#) for details.
2. Can PropertyBoss be used by multiple users on my network?
Yes. PropertyBoss allows multiple users to access the same data at the same time. You must purchase the network version of PropertyBoss and install using the Network Access installation instructions described in this guide.
3. Can all of my remote properties connect to PropertyBoss?
Yes. If all of your remote properties can already connect to a shared network, the network version of PropertyBoss allows access by multiple users at the same time. You will have to install PropertyBoss on each of the workstation computers at the remote locations. If your remote properties do not already connect to a shared network, the hosted version of PropertyBoss also allows you to connect your remote properties. And, best of all, you do not have to install PropertyBoss at each location. Everyone accesses over the web.
4. Where will my data be stored?
During installation, you will complete a step where you create your PropertyBoss database. Your data will be stored in this database. The database is typically located in a folder on your C drive C:\PropertyBoss Data.
5. What version of PropertyBoss will I install?
Your software fulfillment email contains a download link for the most recent version of PropertyBoss. The download file usually has the version number embedded in the name. For example, pboss901.exe would indicate version 9.01 of the software. After you install PropertyBoss and log into your database, in the top left corner of the toolbar, click: Help > About PropertyBoss. Your version number will be provided on the window that displays.

When an updated version of PropertyBoss is available, you will be notified in the Messages section of PropertyBoss Today, your PropertyBoss "home" page. We highly recommend that you install each upgrade so that you have access to the latest features and feature updates.

6. Where do I install PB Server and PropertyBoss?
You will install PB Server to the single computer that you designate as your server computer. You will install PropertyBoss to the PB Server computer and all workstation computers. For both programs, the installation wizard defaults to the Program Files folder on the C drive. PropertyBoss will install to another location only if you change this setting during installation.
7. Do I install the PB Server program before the PropertyBoss program?
Yes. If you are installing PropertyBoss for the first time, you will install PB Server first.
8. How do I switch from Evaluation installation to Network installation?
If you have already installed PropertyBoss in Evaluation mode, you will still follow the instructions in this guide for installing the network version. You will need to update the installation mode on the computer on which you installed the evaluation version of PropertyBoss. If the evaluation version is on the computer you are designating as the PB Server computer, you will change the installation mode to Network - Server. If the evaluation version is on the computer you are designating as a workstation computer, you will change the installation mode to Network - Workstation. The [General Troubleshooting](#) section provides the detailed instructions on making this change. If you have already created your database and entered live production data on a workstation computer, you also need to backup the database and restore it to the PB Server computer.
9. How do I obtain permanent registration numbers?
When you install PropertyBoss, you will install with a 30-day temporary license. You will create your database and send the database name and database key to Client Care. ([Step Seven](#) provides instructions.) Once we receive this information and process your payment, Client Care will email your permanent registration numbers. While accessing PropertyBoss with the 30-day temporary license, you can enter your live production data and you have full access to all PropertyBoss features.
10. How do I get out of test mode?
If you have been relocating or restoring your database, the title bar of PropertyBoss may indicate that you are in test mode. To switch to production mode, go to: Setup Preferences > Security Settings and click the button on the lower right.
11. Can I enter all of my properties and units into one database?
Typically, yes. However, there are exceptions. Please review the [Databases](#) section for detailed information.
12. Now that I have completed installation, what do I do next?
After installing PropertyBoss, you are ready to prepare your database for "going-live." This involves entering your startup data, customizing your system preferences, etc. You can review the online documentation for instructions or arrange for implementation and training sessions with a PropertyBoss specialist. See the Beyond Installation section for a list of important tasks.

[Home](#) > [Installation Guides](#) > [PropertyBoss on Mac Computers](#)

PropertyBoss on Mac Computers

PropertyBoss can be run on Mac computers but will not run on the native Mac operating system.

There are two ways to run PropertyBoss on a Mac computer:

Use Bootcamp:

- At startup, select to run as Mac, OSX, Vista or Windows 7 (you must have a copy of Vista or Windows 7 installed)
- The computer will need to be restarted to go back to Mac

Use Virtualization software:

- VMWare/Fusion – vmware.com/products/fusion
 - Parallels for Mac – parallels.com
 - VirtualBox – virtualbox.org (free)
- Does not require shutdown and restart to move back and forth between Mac and Windows
- Run in Mac OS, except when you need to run a Windows program such as Excel, Word, etc. and then select the option to run as Windows OS
- There is also Mac Office (Mac version of Word, Excel, etc)

See also

[Single User Installation Guide](#)
[Network Access Installation Guide](#)
[Remote Access](#)
[Upgrade Installation Guide](#)
[Database in Test Mode](#)
[Installation Troubleshooting](#)

[Home](#) > [Installation Guides](#) > [Remote Access](#)

Remote Access

Terminal Services

Setting up remote access to a PropertyBoss database server can be handled through a couple of different technologies. The recommended method is through a Terminal Services type server. This allows a remote user to login to a Terminal Server located at the same facility where the PropertyBoss data is being stored and run the PropertyBoss application on that machine. The only data that is transmitted to the remote user are tiny screen updates of the PropertyBoss Application.

A typical server can handle many users connected via this method and most Windows 2003 Standard or above installations come with 5 user Terminal Services license. To calculate how much memory might be needed by each user, you can start by allocating 50 megs for PropertyBoss and then another 30 to 50 for windows processes. So in most cases you will need around 100 megs of RAM per user session. Remember that if you are exporting data to Microsoft Office products such as Excel or Word, these memory requirements could go up significantly per user.

VPN (Virtual Private Network)

While a VPN is not the recommended method of remote computing with PropertyBoss, it is certainly possible and can work quite well if your VPN tunnel has enough speed available. If your inbound and outbound speeds to your remote location is 10mb or more, PropertyBoss should appear to be fairly responsive. If, however, you have a standard residential or small business DSL or cable modem, you probably have what is known as asynchronous connection. This means that your inbound speed is very fast and your outbound or upload speed is a fraction of the inbound. If this is the case, retrieving and submitting data to the PropertyBoss server could take some time. Only by testing this will you be able to determine whether or not you can tolerate the delays.

One thing that you can try to increase speed across a VPN connection is to use the Compress Packets option on the SQL anywhere ODBC driver. This can be done by copying the registry.txt file from the PropertyBoss installation directory of the remote computer and placing it into the PropertyBoss Data directory of that same computer. Edit the file and add the following line;

```
<network>CommLinks=<commlinks>
<network>Compress=Yes           <--New Line
<network>CBSize=4096
```

Save the changes to the registry.txt file and restart PropertyBoss. With this change, all traffic to the database server will now be approximately a third of what it was without Compression.

The speed of your VPN is only as fast as the weakest link in your connection. So if your corporate location has a huge pipe with plenty of bandwidth to spare and your remote location only has a 3meg in and 1 meg out DSL connection, you can expect the user at the remote location to complain of lags and delays.

Summary

Again, PropertyBoss recommends using some type of Terminal Services or Citrix type connection over a VPN, but a properly configured VPN with plenty of bandwidth can operate fairly well.

See also

- [Single User Installation Guide](#)
- [Network Access Installation Guide](#)
- [PropertyBoss on Mac Computers](#)
- [Upgrade Installation Guide](#)
- [Database in Test Mode](#)
- [Installation Troubleshooting](#)

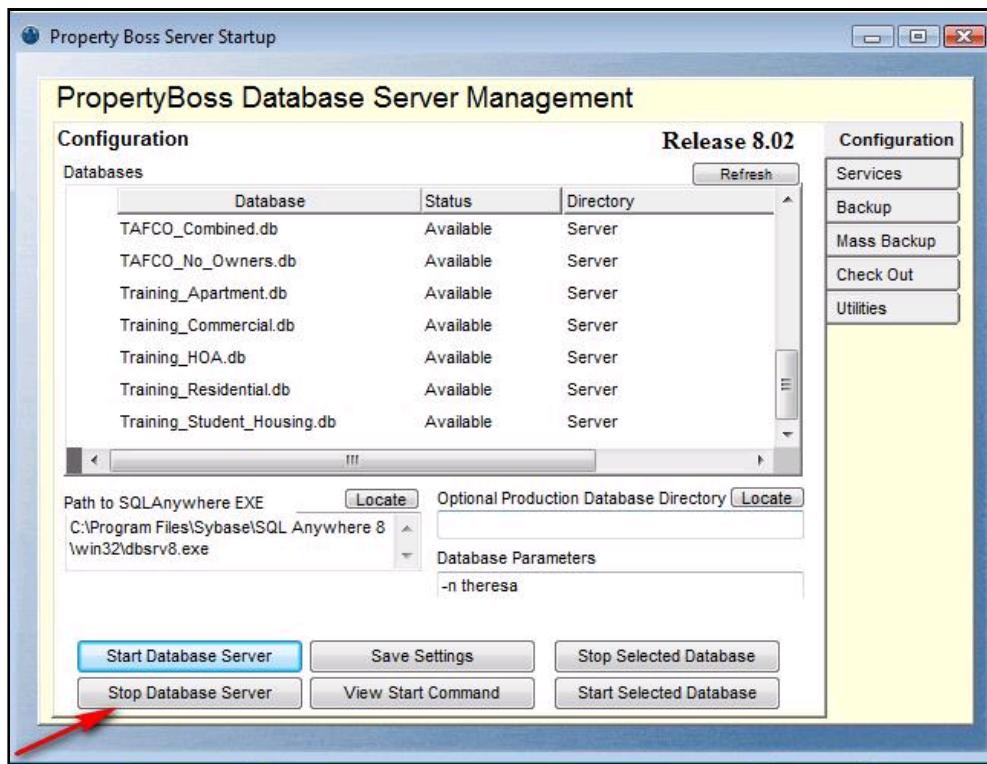
Upgrade Installation Guide

NOTE:

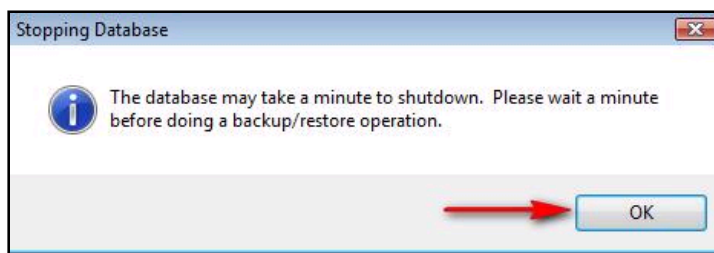
- Network User Access – Please follow the steps beginning at Step 1. It is crucial that you stop the database server for a successful upgrade.
- Single User Access – Please follow the steps beginning with Step 10.
- Already on Release 9 – Please follow the steps beginning with Step 23. Check your version by clicking Help and About PropertyBoss.

1. If you are using the Network version of PropertyBoss, you MUST STOP the database server before you begin the installation:

- Click Stop Database Server



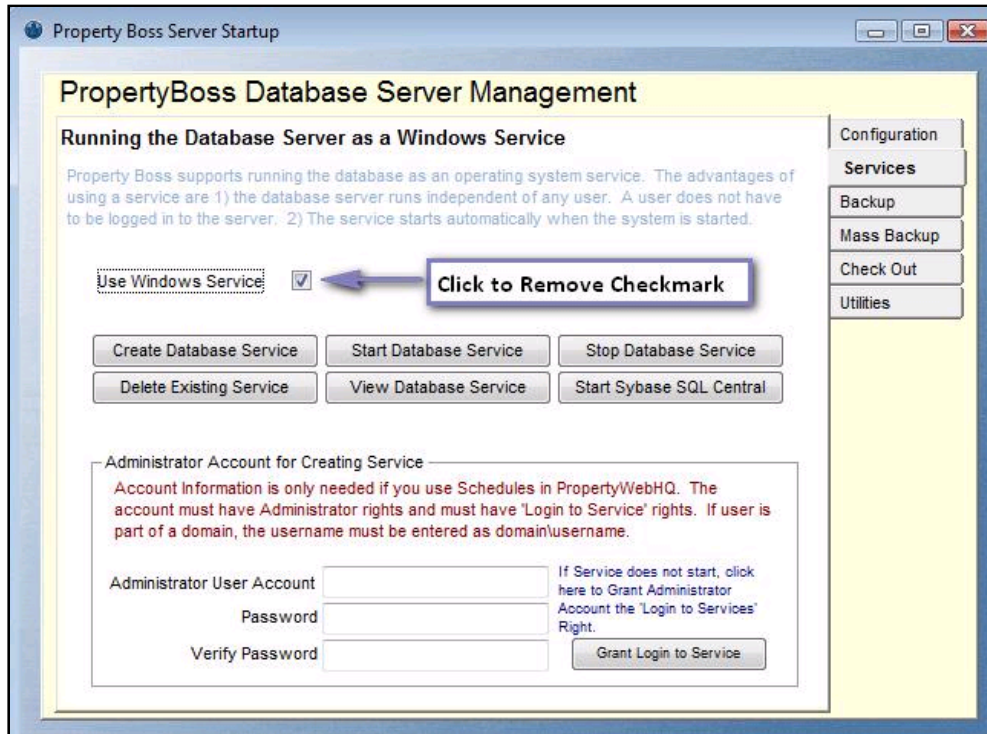
- Click OK



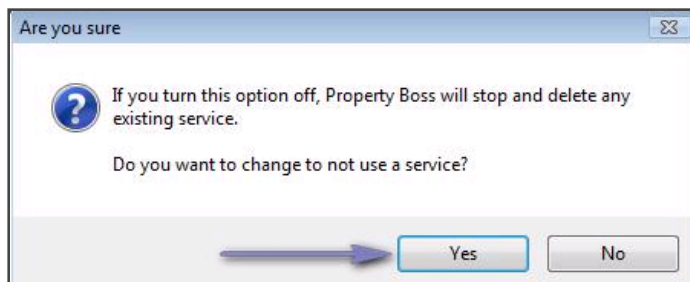
If you are using the Network version of PropertyBoss AND it is running as a SERVICE, you MUST STOP AND DELETE the Service before you begin the installation:

- Click on the Services tab

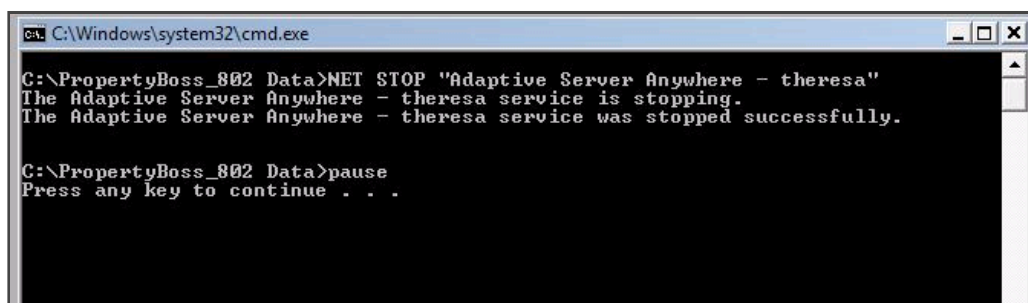
- Remove the checkmark from the Use Windows Service checkbox



- Click Yes and Yes again to confirm that you want to delete the Service.

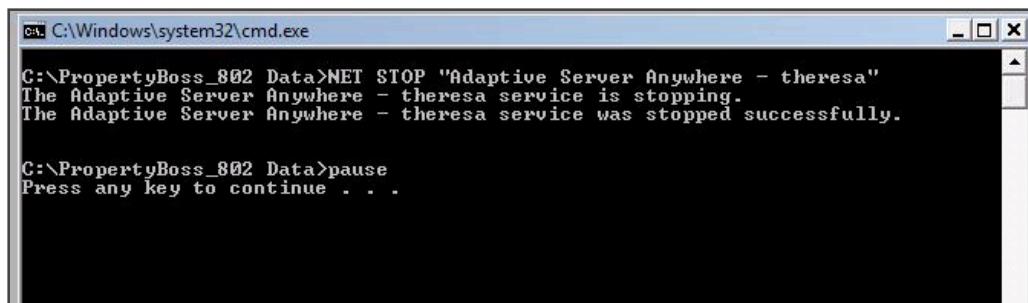


- This window confirms that the Service was deleted. Press any key to close the window.



- Use the link included in the Upgrade Package e-mail you received to download and Save the following programs:

- Sybase iAnywhere Database Server – pbserver11.exe



```

C:\Windows\system32\cmd.exe

C:\PropertyBoss_802 Data>NET STOP "Adaptive Server Anywhere - theresa"
The Adaptive Server Anywhere - theresa service is stopping.
The Adaptive Server Anywhere - theresa service was stopped successfully.

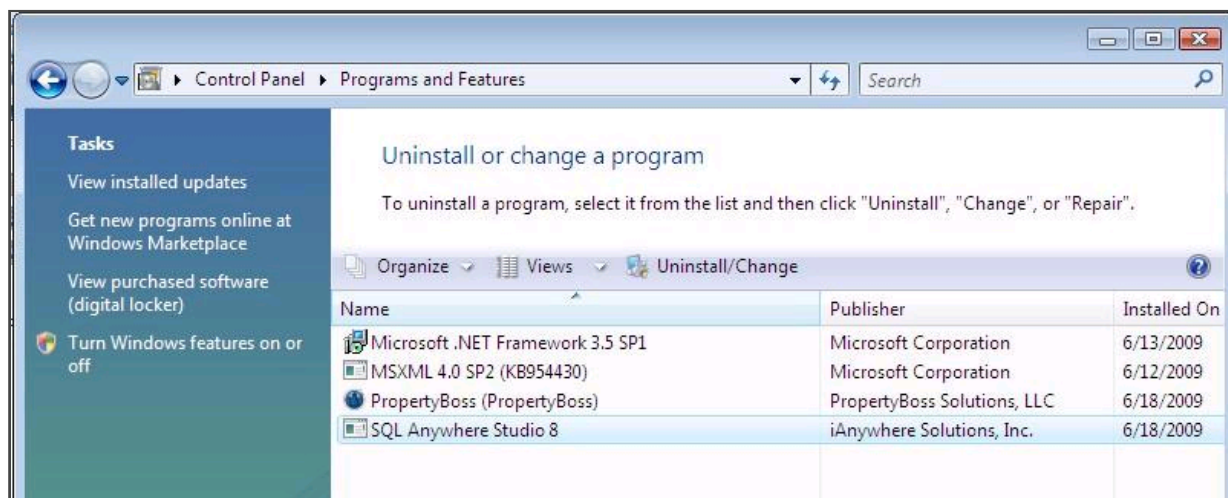
C:\PropertyBoss_802 Data>pause
Press any key to continue . . .

```

- PropertyBoss 2010 Program – pboss9xx.exe



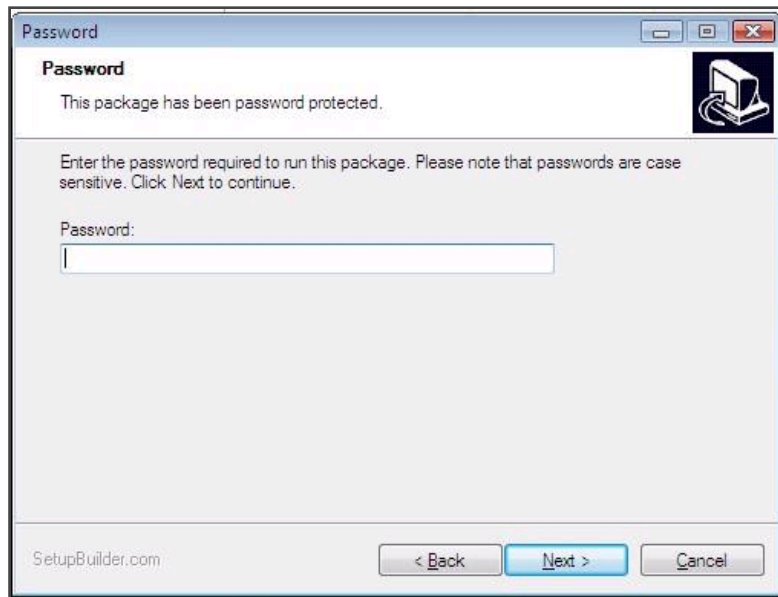
3. On the Server, click Control Panel and select Add/Remove Programs (Windows XP) or Programs and Features (Windows Vista) and Uninstall SQL version 8 (SQL Anywhere Studio 8 or Sybase 8 or SQL Anywhere 8, etc).



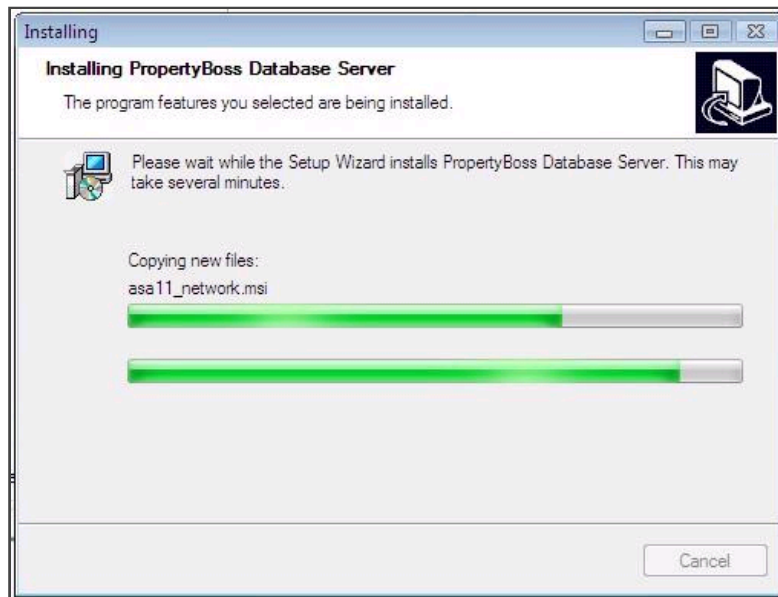
4. On the Desktop, click pbserver11.exe and the Installation Wizard will begin. Click Next.



5. Enter the password provided in the Upgrade Package email and click Next.



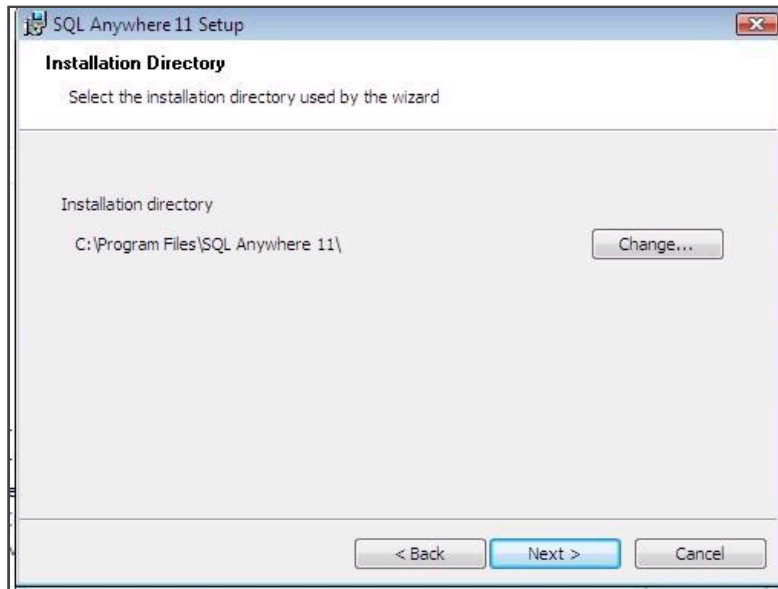
6. The Installing window appears with a status bar indicating the progress.



7. Click Next on the SQL Anywhere 11 Setup window.



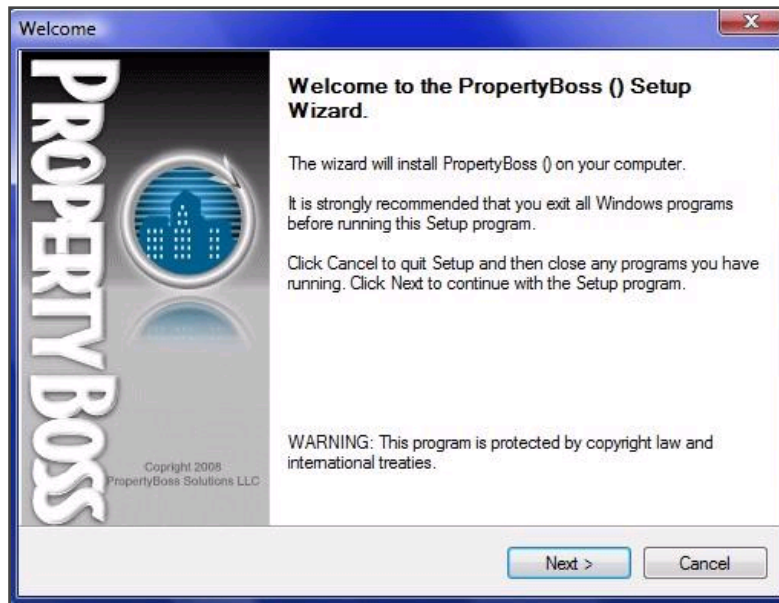
8. Click Next on the Installation Directory window.



9. When done, click Finish on the Setup Wizard Complete window.

REBOOT THE SERVER. PropertyBoss will not be able to connect to the database(s) until you reboot the machine.

10. On the Desktop, click pboss9xx.exe and the Installation Wizard will begin. Click Next.



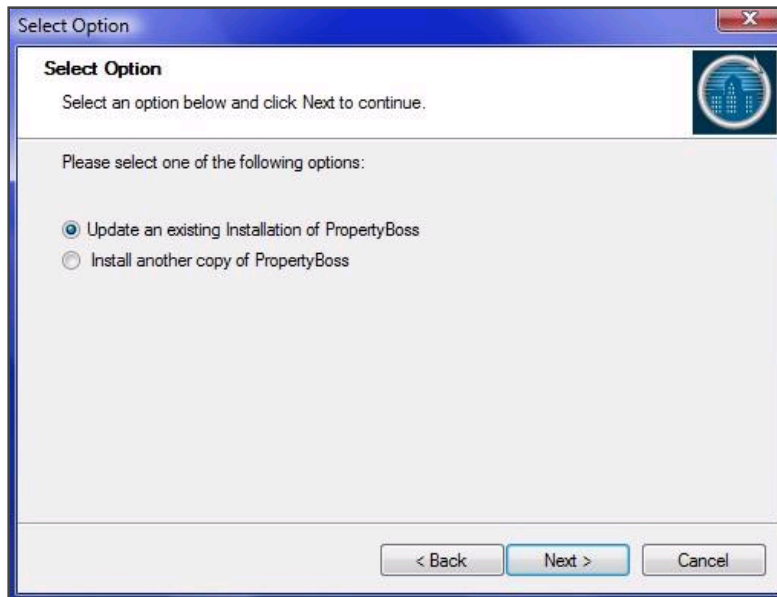
11. License Agreement

- Click to accept the agreement and click Next.



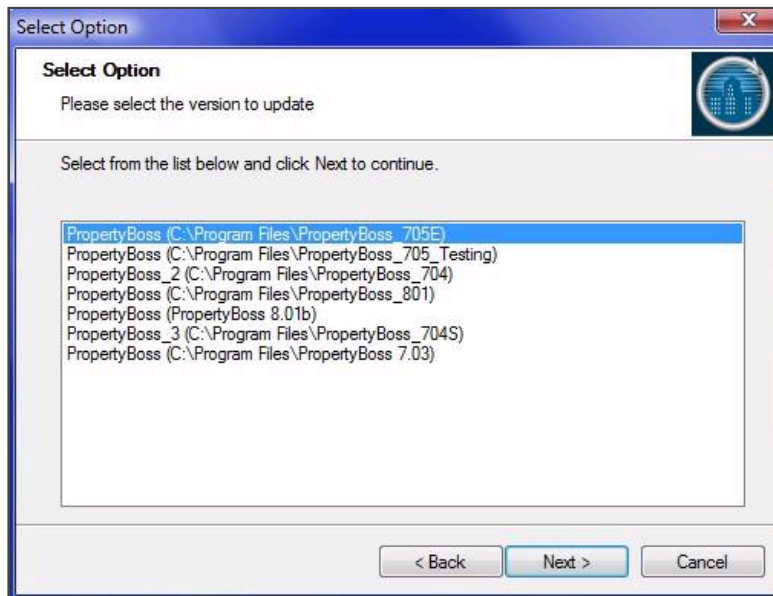
12. Select Option

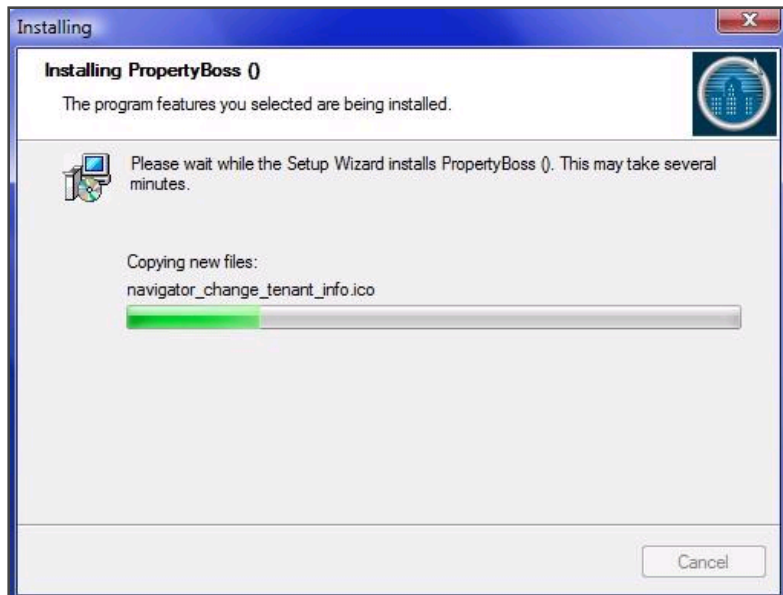
- Select to update your current installation.



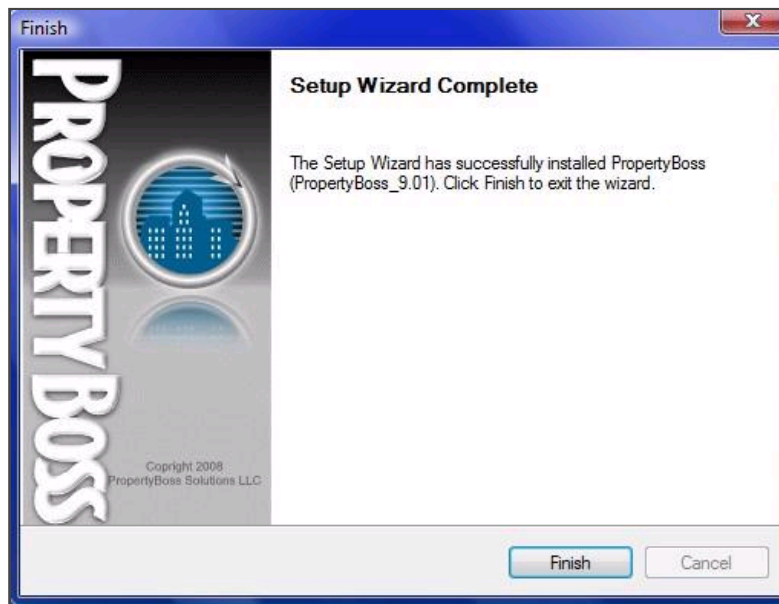
13. Setup Type

- If you have more than one instance of PropertyBoss installed on your computer, you will be prompted to select the correct directory and then click Next.
- Otherwise, click Next and the installation will begin.



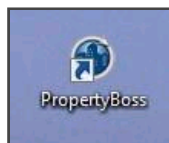


14. When the installation is complete, click Finish.

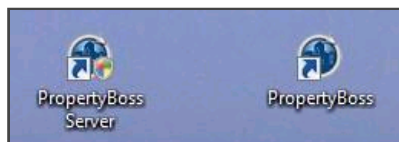


- If prompted, click to Restart your computer and click Finish.

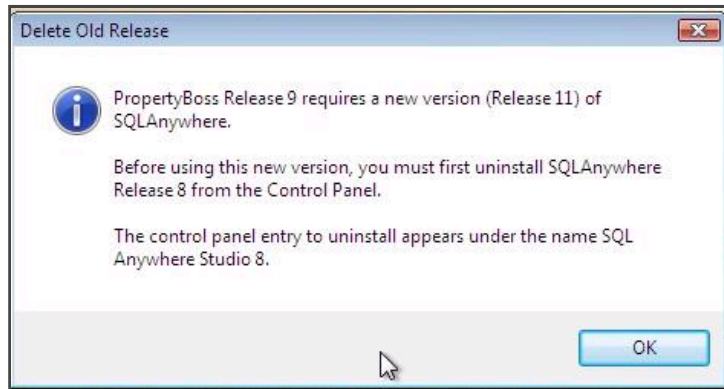
15. If you are using the Single User version, you will see a new icon on your Desktop. Double click to open PropertyBoss and upgrade your database.



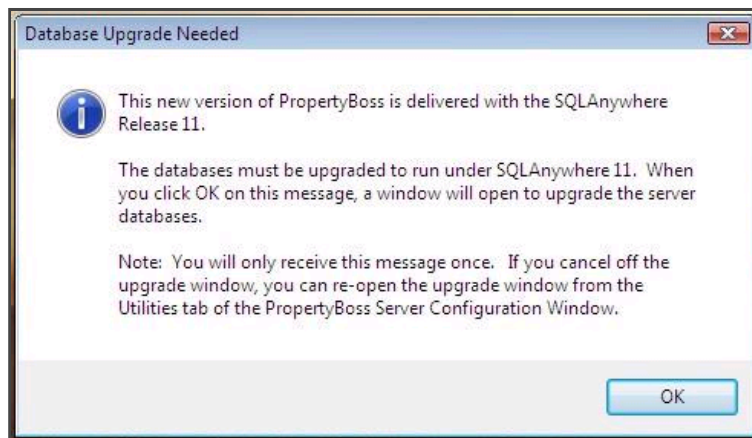
16. If you are using the Network version, you will see a new PropertyBoss Server and PropertyBoss icon on your Desktop. Double click on the PropertyBoss Server icon to start the database server.



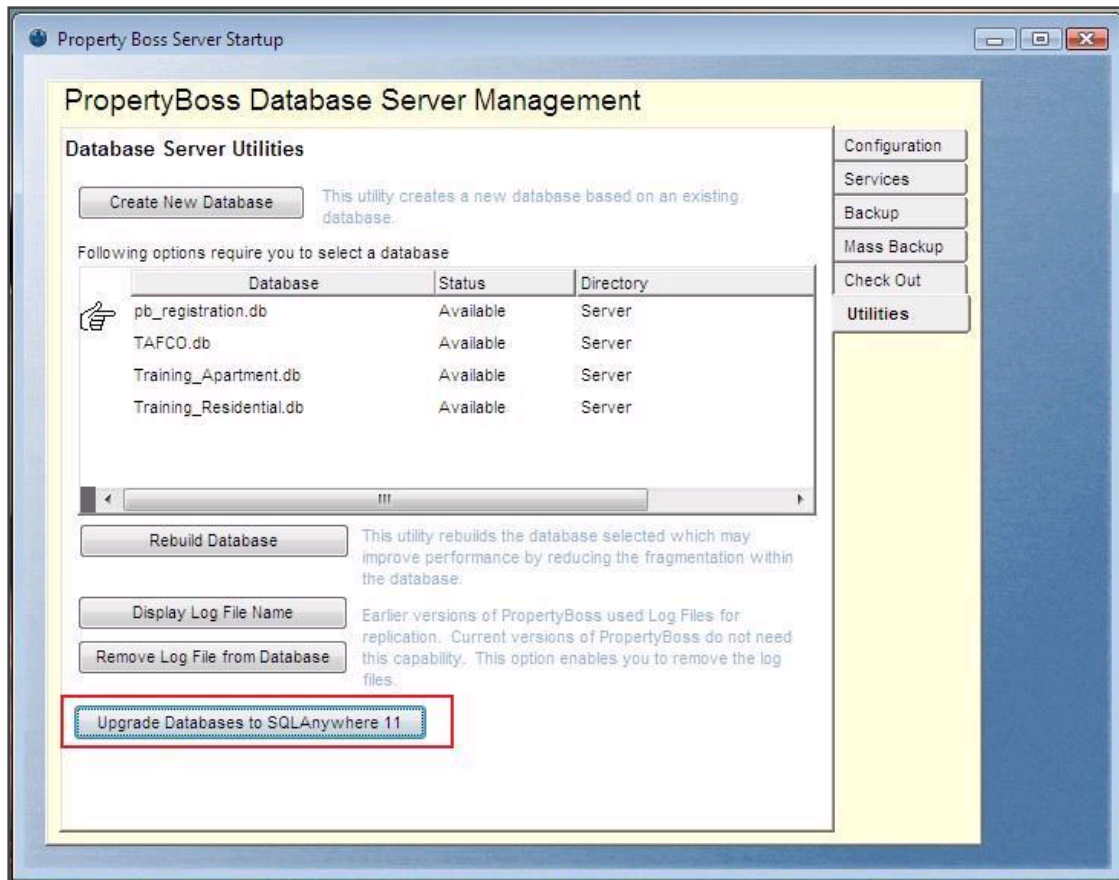
17. If you have not uninstalled SQL Anywhere Studio 8, you will receive the following message. Click OK and follow the instruction in Step 3 above.



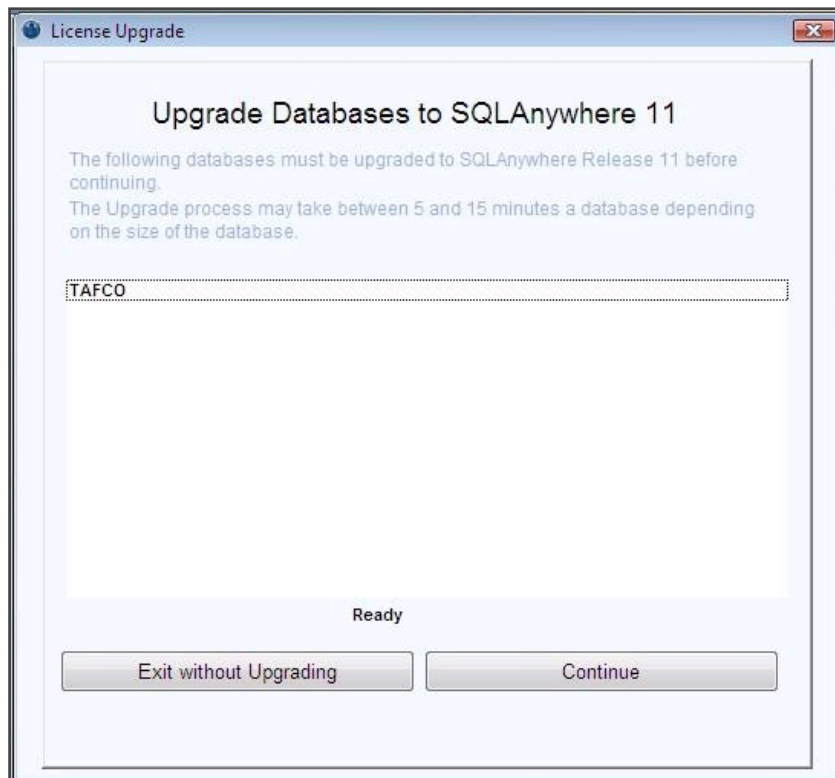
18. Otherwise, you will receive the Database Upgrade Needed window. Click OK.



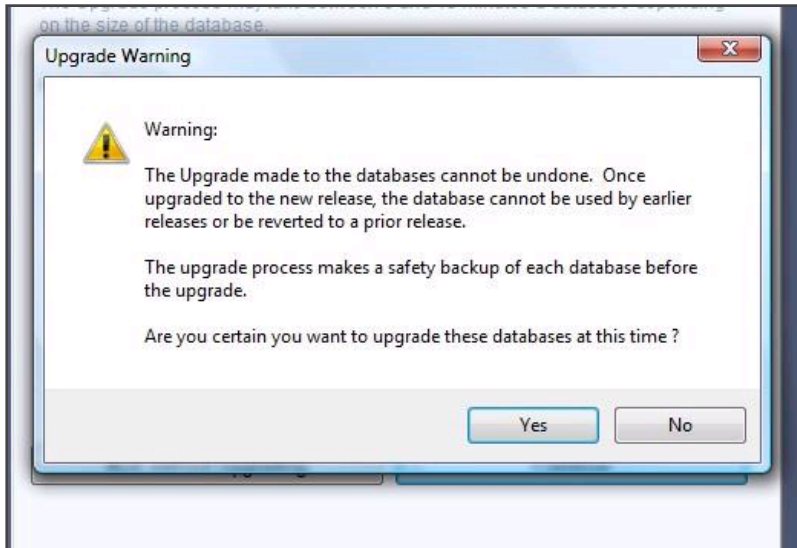
- If you closed the Database Upgrade Needed window without clicking OK, you can re-open it by clicking the Utilities tab and then selecting Upgrade Databases to SQL Anywhere 11.



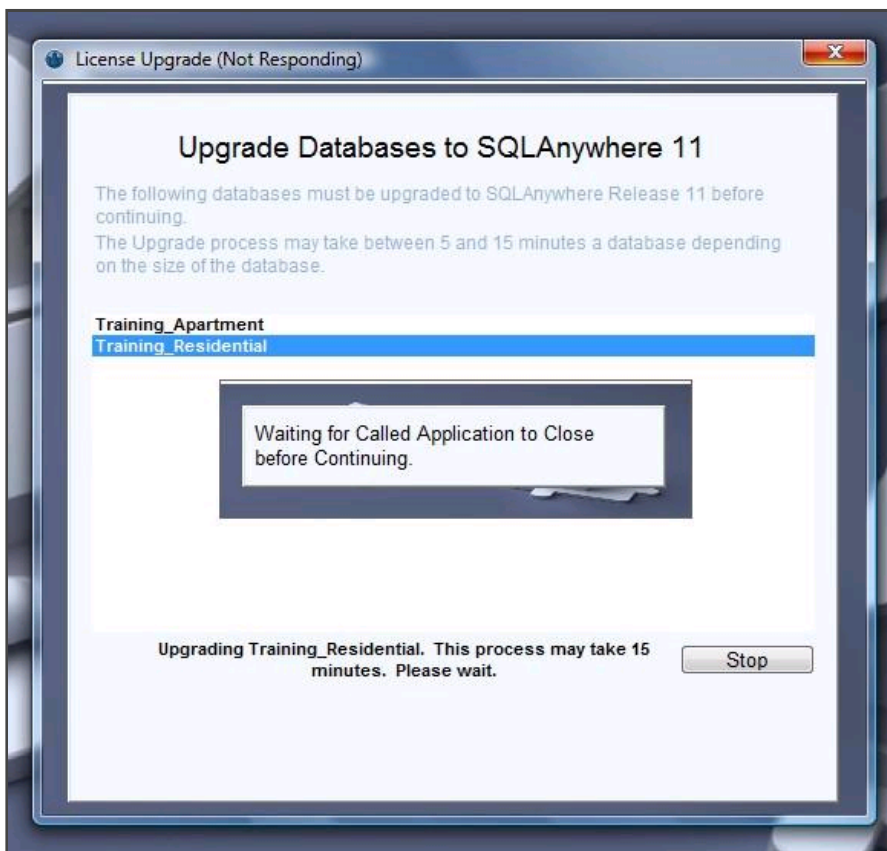
19. PropertyBoss will determine which databases must be upgraded in SQL Anywhere 11 and run the upgrade automatically.

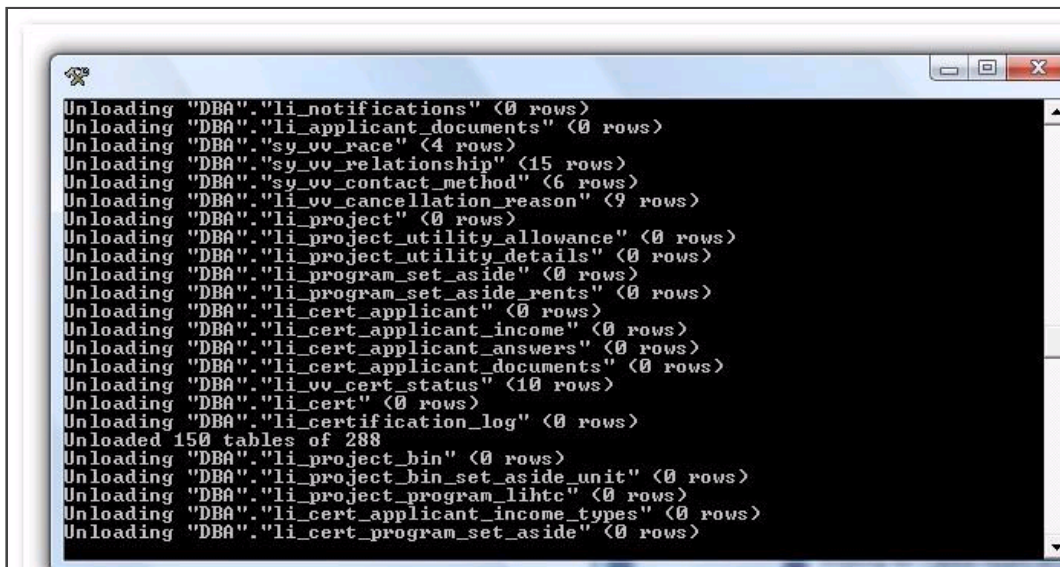
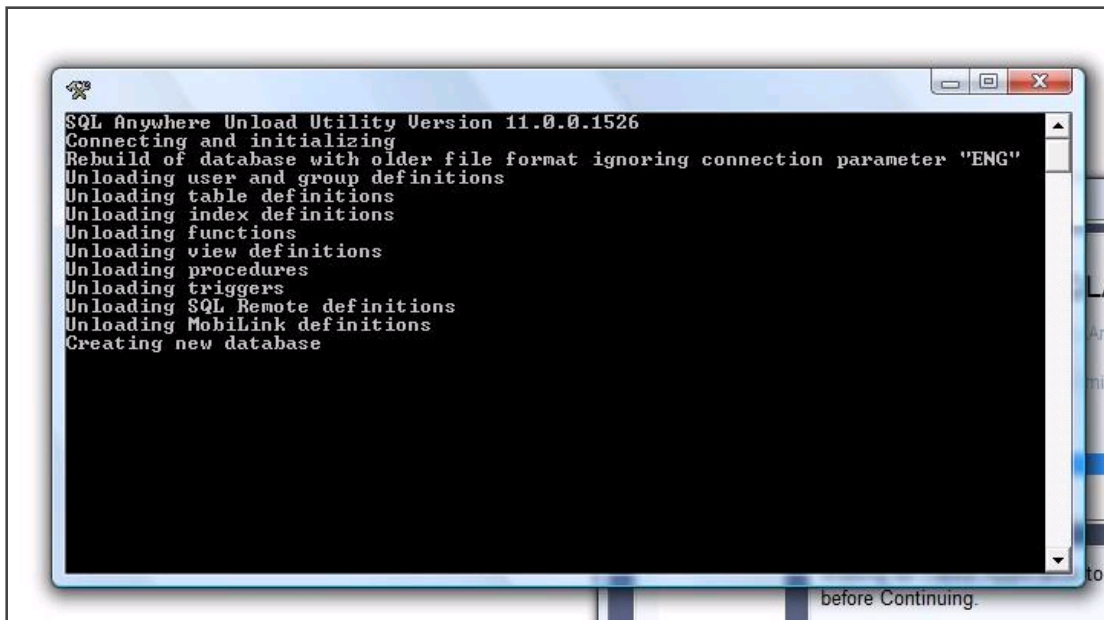


- Click Continue.

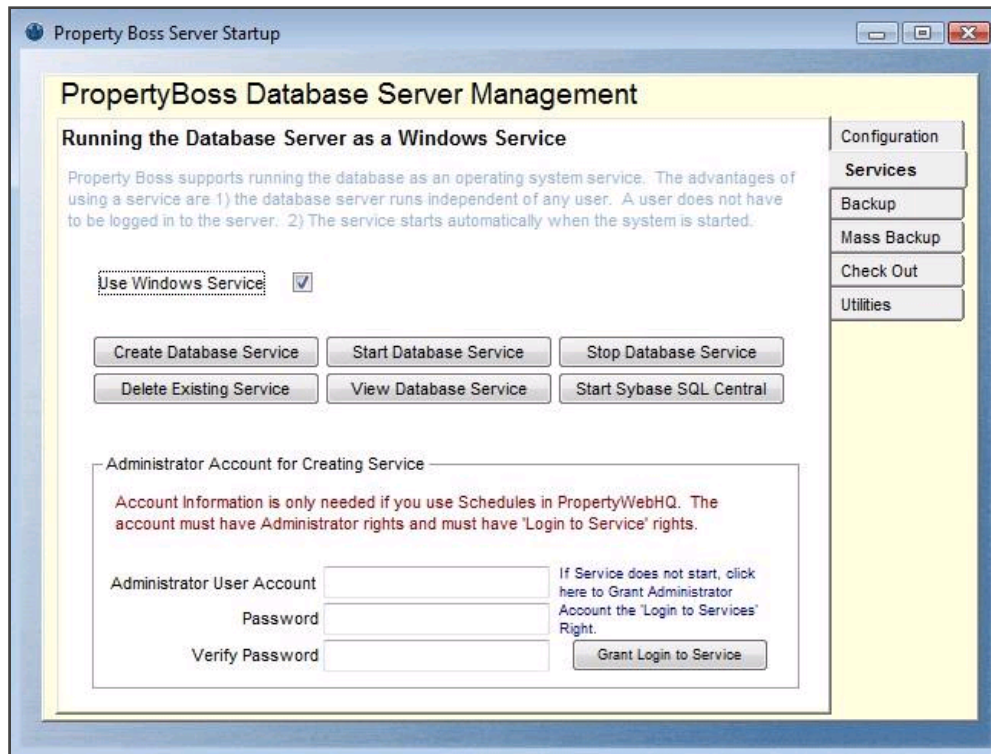


- Click Yes and you will see the following windows:

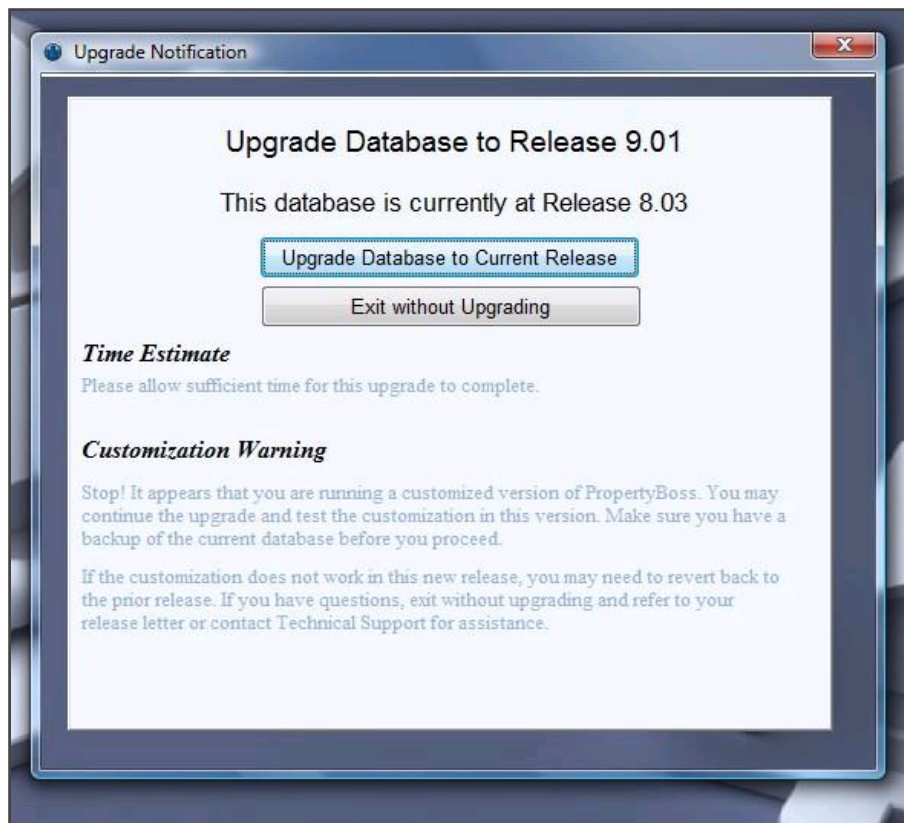




20. When done, recreate the Service by clicking on the Services tab and checking Use Windows Service.



21. Double click on the PropertyBoss icon and UPGRADE EACH DATABASE TO RELEASE 9xx.

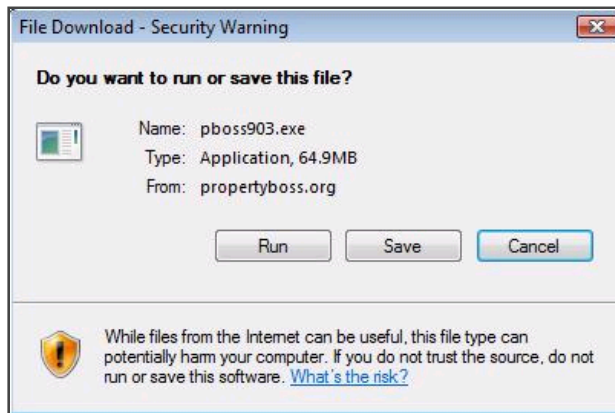


22. The PropertyBoss 9 installation needs to be run on each workstation using the pboss9xx.exe download.

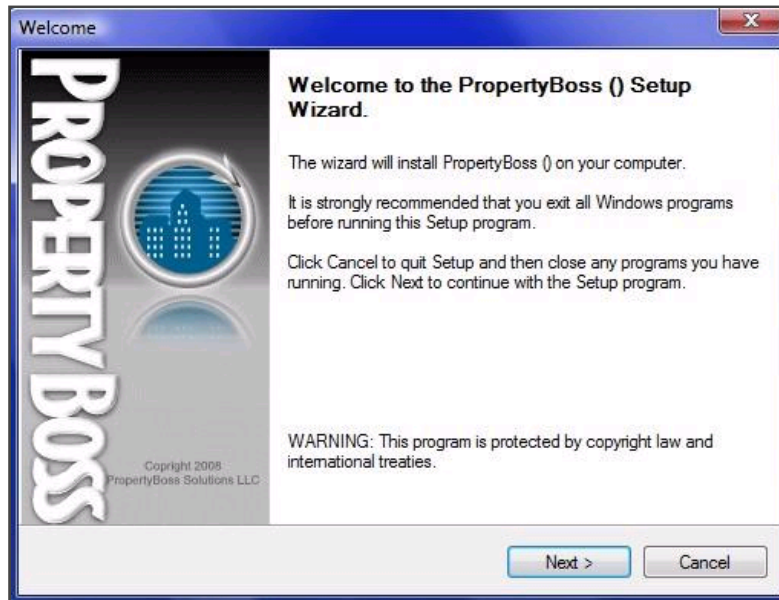
USERS ALREADY ON VERSION 9:

23. Use the link included in the Upgrade Package e-mail you received to download and Save the following program to your Desktop:

- PropertyBoss 2010 Program – pboss9xx.exe



24. On the Desktop, click pboss9xx.exe and the Installation Wizard will begin. Click Next.



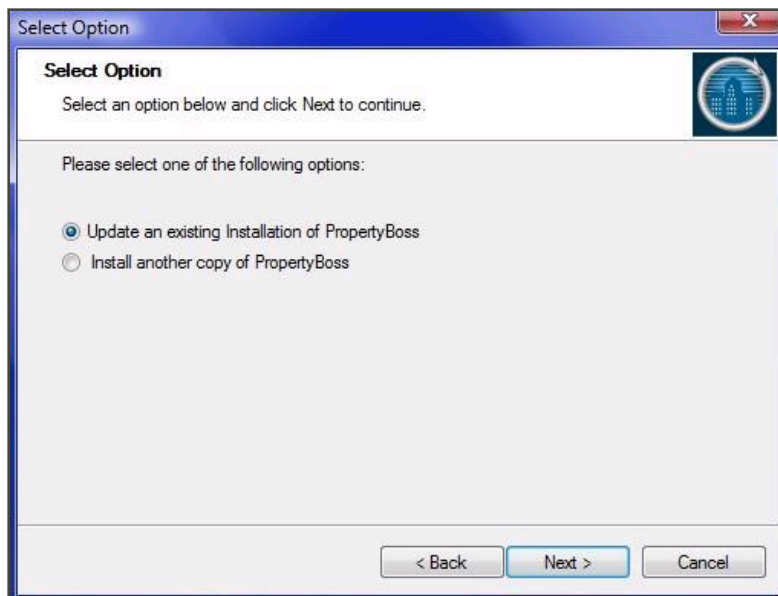
25. License Agreement

- Click to accept the agreement and click Next.



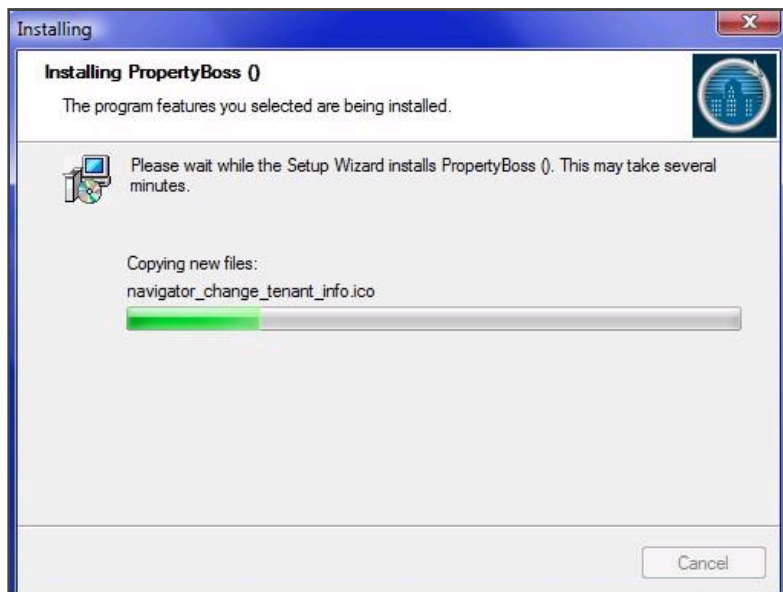
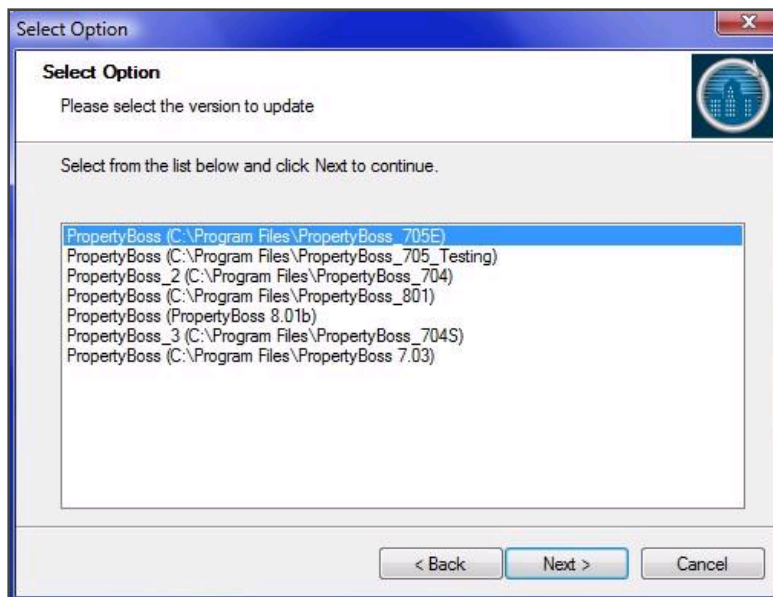
26. Select Option

- Select to update your current installation.

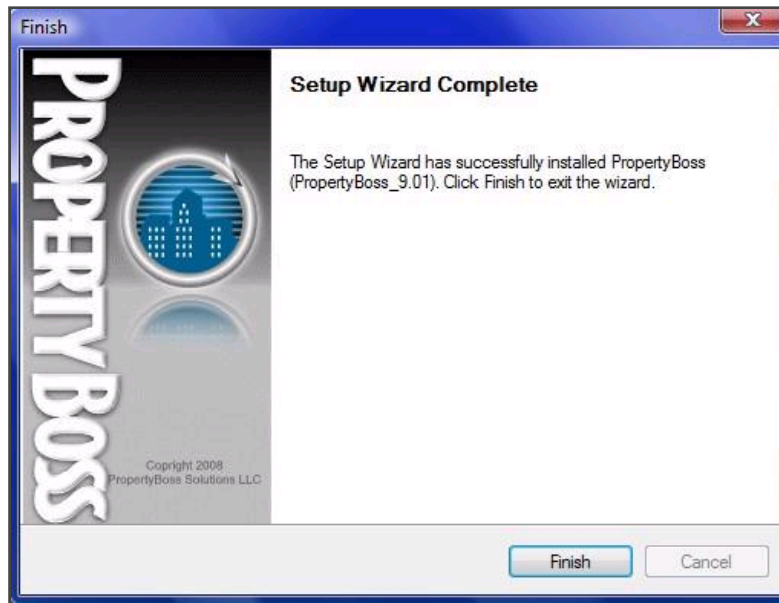


27. Setup Type

- If you have more than one instance of PropertyBoss installed on your computer, you will be prompted to select the correct directory and then click Next.
- Otherwise, click Next and the installation will begin.

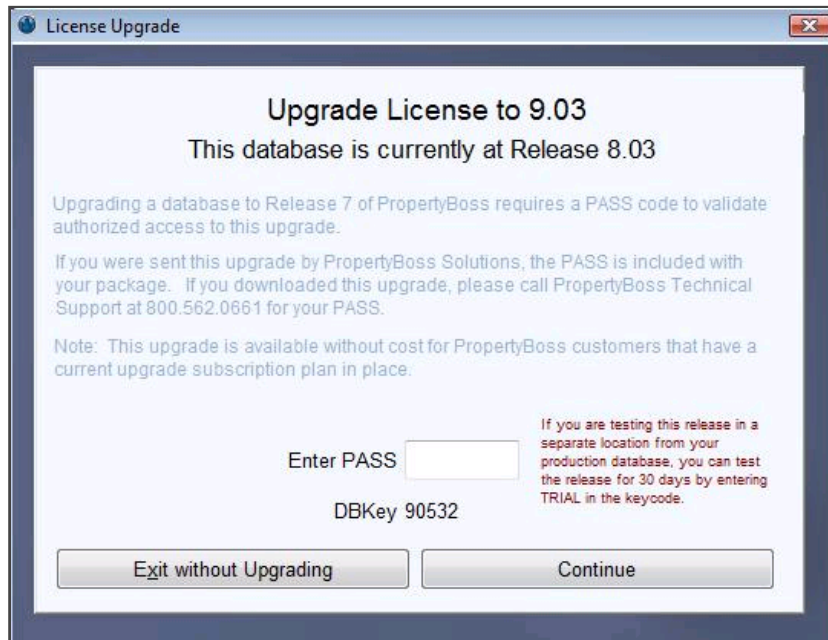


28. When the installation is complete, click Finish.



- If prompted, click to Restart your computer and click Finish.

29. Double click on the PropertyBoss icon and UPGRADE EACH DATABASE TO RELEASE 9xx.



30. The PropertyBoss 9 installation needs to be run on each workstation using the pboss9xx.exe download.

See also

[Single User Installation Guide](#)
[Network Access Installation Guide](#)
[PropertyBoss on Mac Computers](#)
[Remote Access](#)
[Database in Test Mode](#)
[Installation Troubleshooting](#)

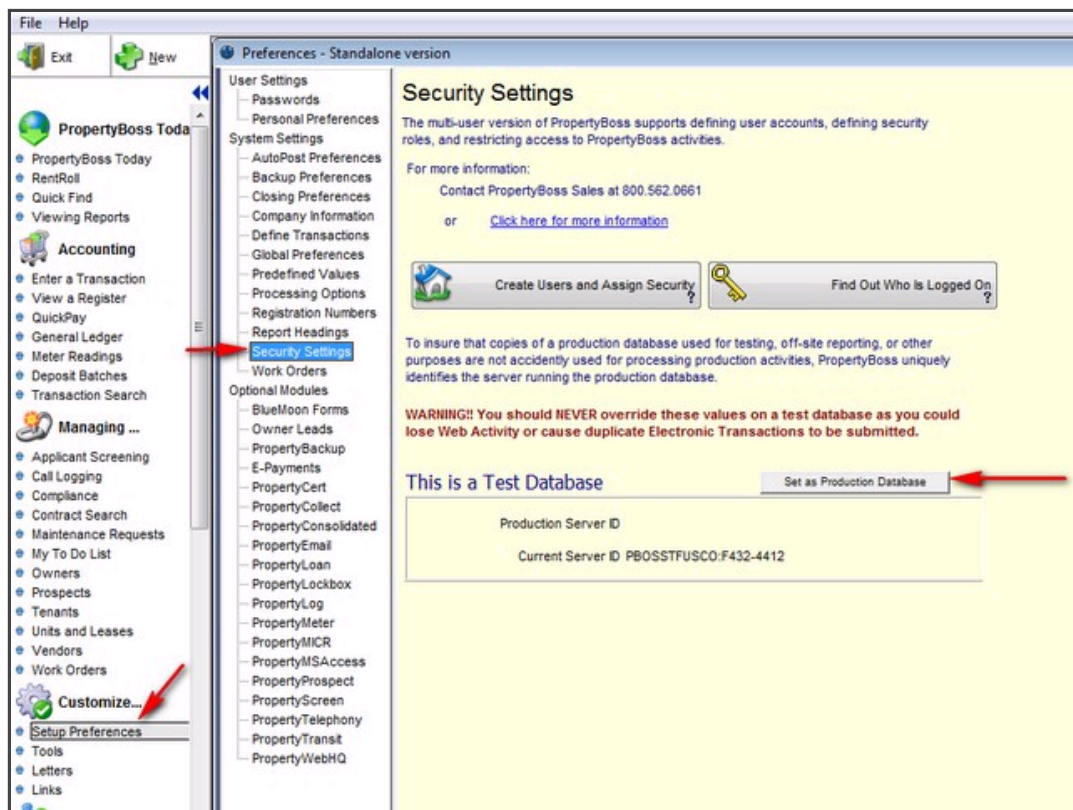
Home > Installation Guides > Database in Test Mode

Database in Test Mode

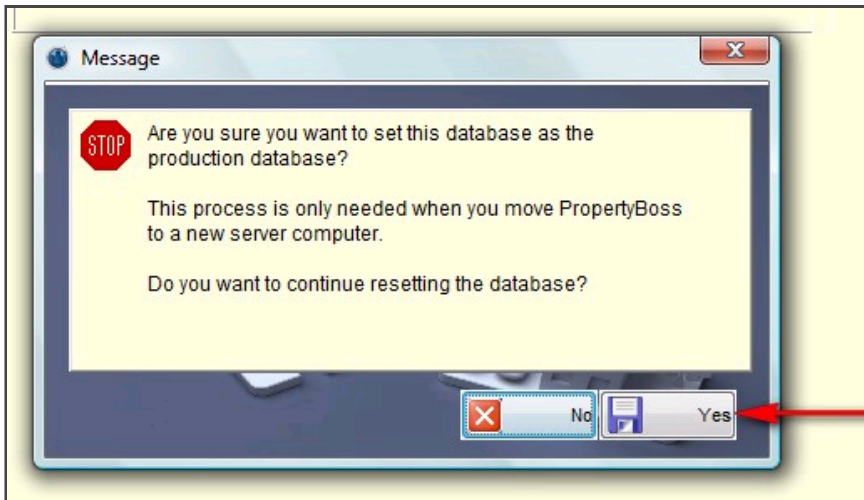
To insure that copies of a production database used for testing, off-site reporting or other purposes are not accidentally used for processing production activities, PropertyBoss uniquely identifies the server running the production database. This can also occur when creating a new PropertyBoss database or moving a database to a new server.

WARNING!! You should NEVER override these values on a true 'Test' database as you could lose Web Activity or cause duplicate Electronic Transactions to be submitted.

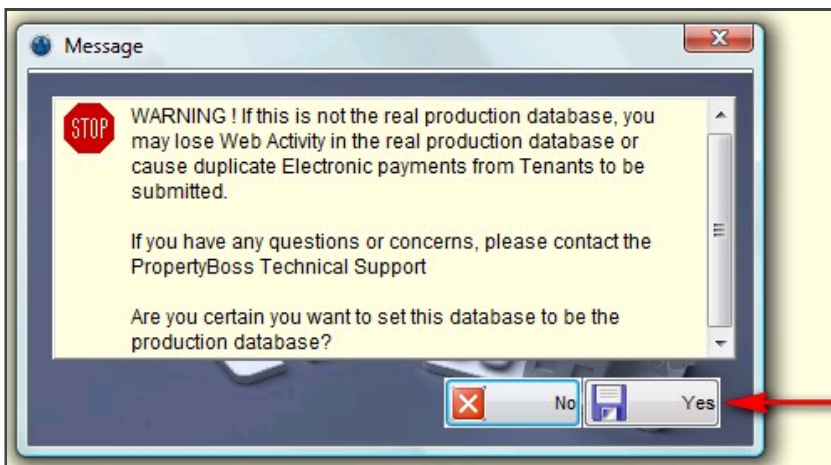
- Change a PropertyBoss database from Test to Production mode
- Open PropertyBoss on any workstation
- Click Setup Preferences Click Security Settings Click Set as Production Database



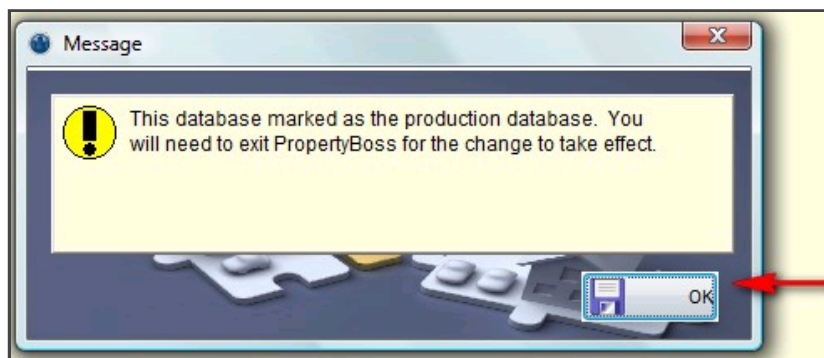
- Click Yes



- Click Yes



- Click OK



- Log out of the database and back in for the changes to apply. If you have multiple databases, this will need to be done in each database.

See also

[Single User Installation Guide](#)
[Network Access Installation Guide](#)

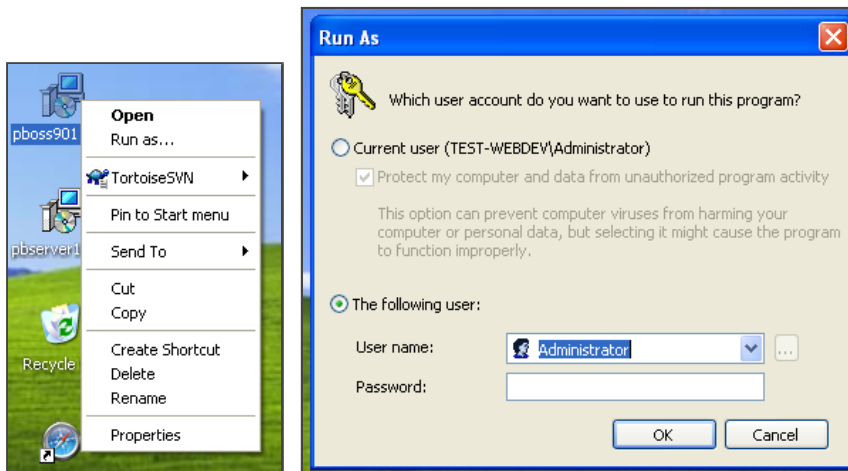
[PropertyBoss on Mac Computers](#)
[Remote Access](#)
[Upgrade Installation Guide](#)
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Installation Troubleshooting

There are several of reasons why you might encounter problems installing the PropertyBoss application. By far, the most frequently encountered problem is related to insufficient permissions on the target machine. The best way to resolve these issues is to follow the guidelines below.

1. Temporarily disable all Antivirus / Anti-spyware products. This especially holds true with the Symantec product line (ie Norton 360).
2. Make sure that the Microsoft Installer engine is up to date on your computer. Our database engine uses Microsoft's MSI installer product to install onto your computer. If this is not up to date the installation will be extremely fast, however, will not provide an error message that there was a problem. This is something we have no control over since the installation package was developed by Sybase. So the best thing to do is simply make sure your engine is up to date. Here is a link to the latest version (at the time of this documentation) for [Microsoft's Installer](#).
3. The final thing would be that your permissions may not be high enough in order to perform the installation. Even though the user you are logged in as states it is a 'Computer Administrator', it still may not have the same rights as the Built-in 'Administrator' that ships with windows. We would highly recommend that you run the installer as an Administrator. This can be done by right clicking on the PropertyBoss installation executable and choosing 'Run As...'. If you have not set the password for the built-in Administrator then you may have to do this prior to attempting to 'Run As...'.



See also

[Single User Installation Guide](#)
[Network Access Installation Guide](#)
[PropertyBoss on Mac Computers](#)
[Remote Access](#)
[Upgrade Installation Guide](#)
[Database in Test Mode](#)