Syllabus Training

**Jupix Property Management and Accounts**

**(*This is a guide only to what will be covered, content may vary dependant on your needs)***

Introduction and Home Screen

Knowledge Centre

Property Management Dashboard

Properties

Add commission and charges

Record safety certificate dates

Upload documents

Preferred suppliers

Creating and managing work orders

Creating a Tenancy

Update tenancy details

Creating AST and other documents

Recording property visits and other dates

Add metre readings

Recoding deposit information

Add tenants first account

Add landlords first account

Tenancy and property ledger

Landlords

Overseas landlord tax

Setting up payment methods

Joint ownership of landlords

Payments

Generating landlord statements
Paying landlord
Paying suppliers
Paying agency
BACS payments
DPS and TDS payments

Accounts

Bank reconciliation
Receipt tenancy monies
Receipt reversals
Deposit refunds
Annual statements
Supplier invoices
Transferring money

Property Management Even Dates

Manage safety certificates
Property Inspections
Renew, periodic and vacate tenancy

Opening Balances

Tenancy
Landlord
Deposits
Arrears

Reports

PM financial reports
Trial balance report
Property management reports

Admin

System configuration
Lettings configuration
Manage users