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