



How-To Guide:

Create and Add Recurring Discounts

OVERVIEW

This guide provides step-by-step actions for adding discount in Storage Commander Configuration Manager including:

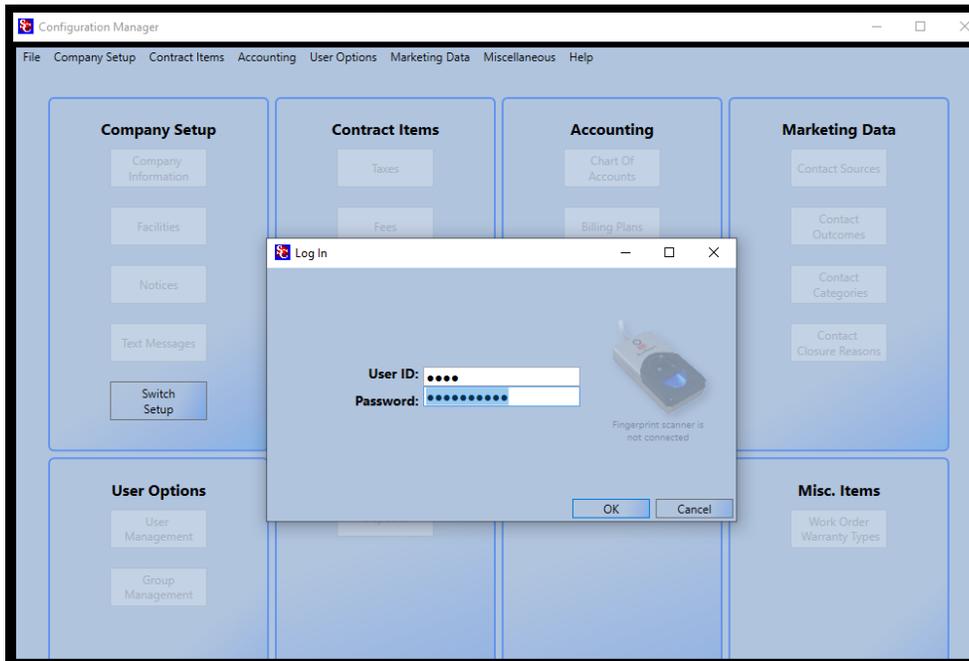
- Setting up discounts in Configuration Manager
- Adding a recurring discount to a tenant's contract

Note: Not all customers have access to the Storage Commander Configuration Manager. Please contact your manager to have them setup up available discounts for your facility.

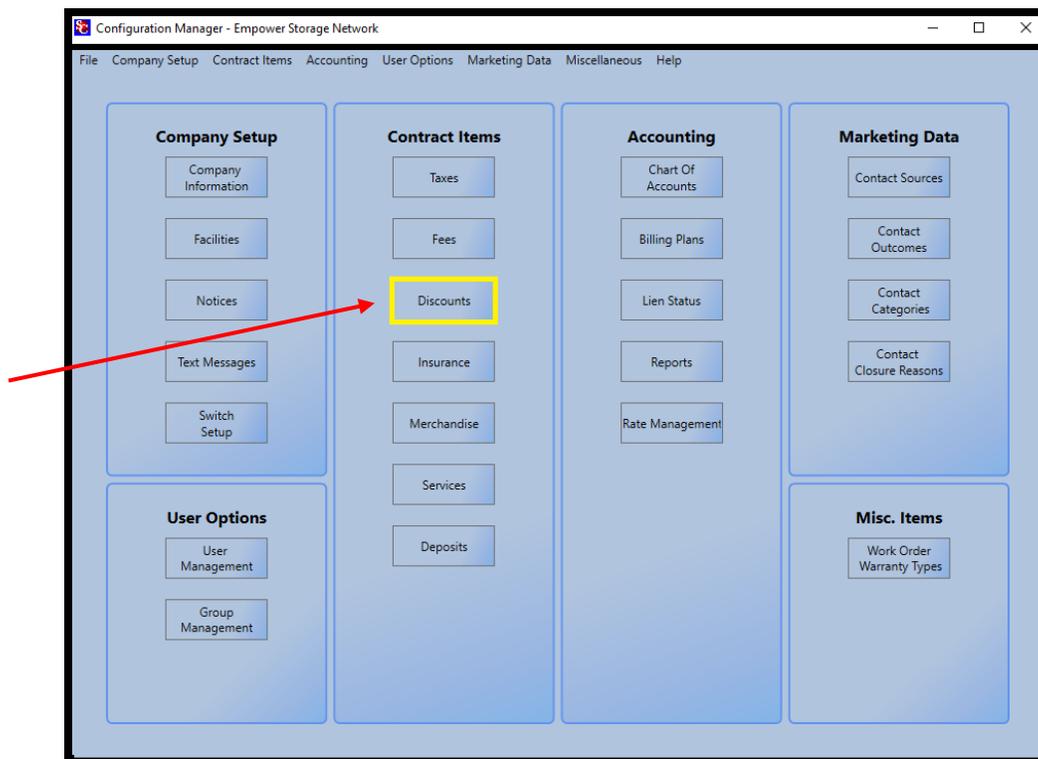
Adding Discounts in Storage Commander

When a facility is converted from other software the data that they send to Storage Commander doesn't include accurate discount information. The facility will need to create the discounts in the Configuration Manager and then assign to each customer's account that has a discount and add it if necessary.

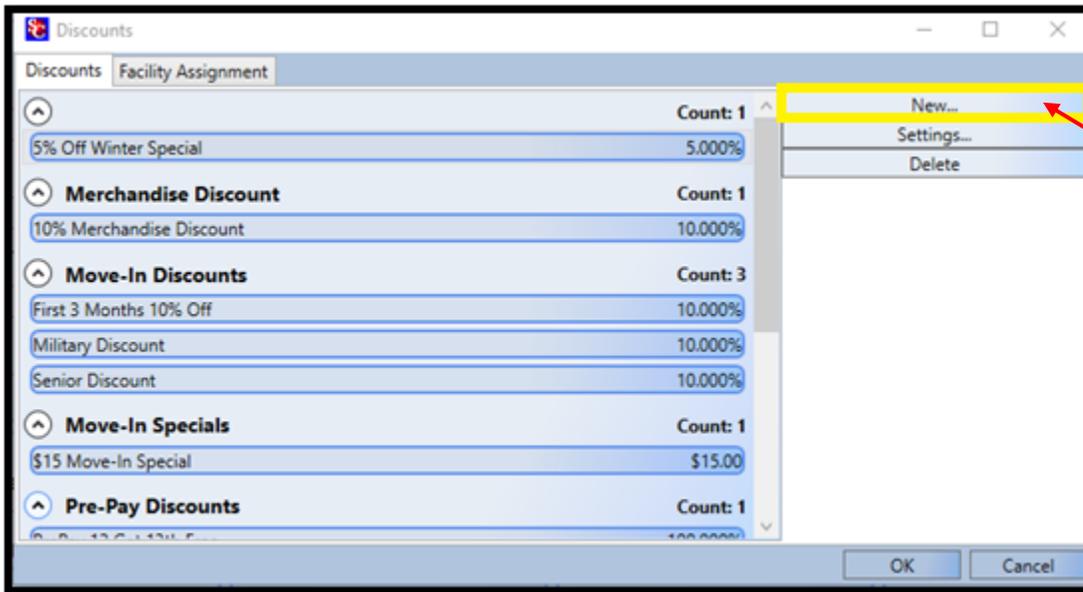
- 1) Navigate to Storage Commander Configuration Manager, Log in.



- 2) To Create Discounts that can be used at the facility (such as: Referral discount, ½ Month off, Free Month...), Click on the **Discounts** button in the Contract Items section.



3) Click on the **NEW** button to open the Discounts Detail window.



4) Enter all fields including: **Name** of the new discount item, and the **Amount** of the discount. Select **Percent** (of the rental rate) or **Fixed** (dollar amount). Now click on the down arrow in the **Account** field to select the account number that this discount will be assigned to in your chart of accounts (*typically this would be assigned to account number 4600 – Rent Discount*).

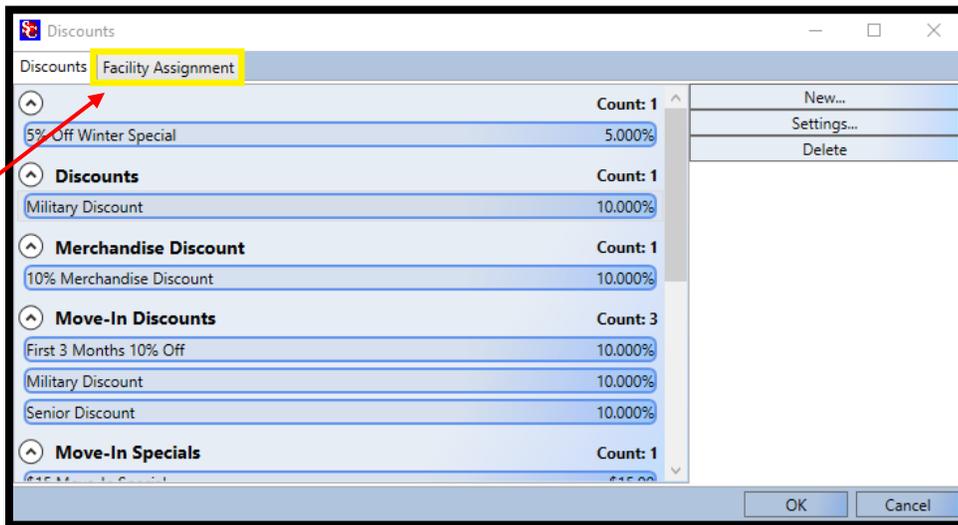
The screenshot shows the "Discounts" window with the "Discounts" tab selected. The form contains the following fields and options:

- Name: Military Discount
- Amount: 10.000%
- Category: Discounts
- Type: Percent Fixed
- Account: 4600 Rent Discount
- Options: Only Available At Move-In Round Amount Variable Amount
- Expires If Late
- Amount Is Promotion Rate For Merchandise Multiple Units Required
- Based On Unit Size Available Online Can Be Waived
- Frequency: Recurring Include Prorated Period
- Expires Start Month: 1 Continues For 1 Months
- Triggered By Occupancy (Discounts with this feature should be added to the 'Auto Apply' list in the billing plans)
- Range Start: 0.00 % Range End: 0.00 %

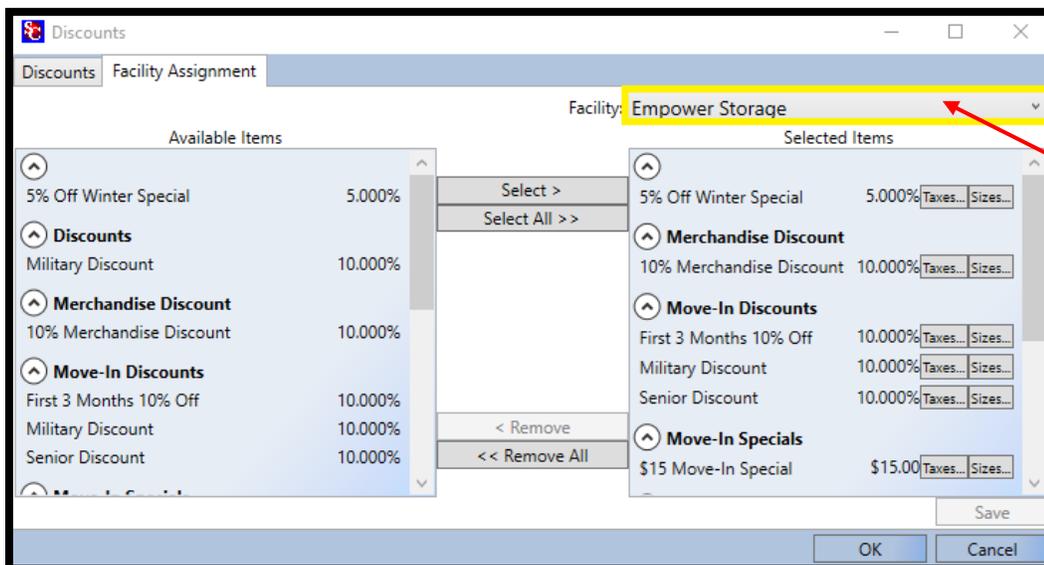
The "OK" and "Cancel" buttons are visible at the bottom right of the window.

5) Select **OK**.

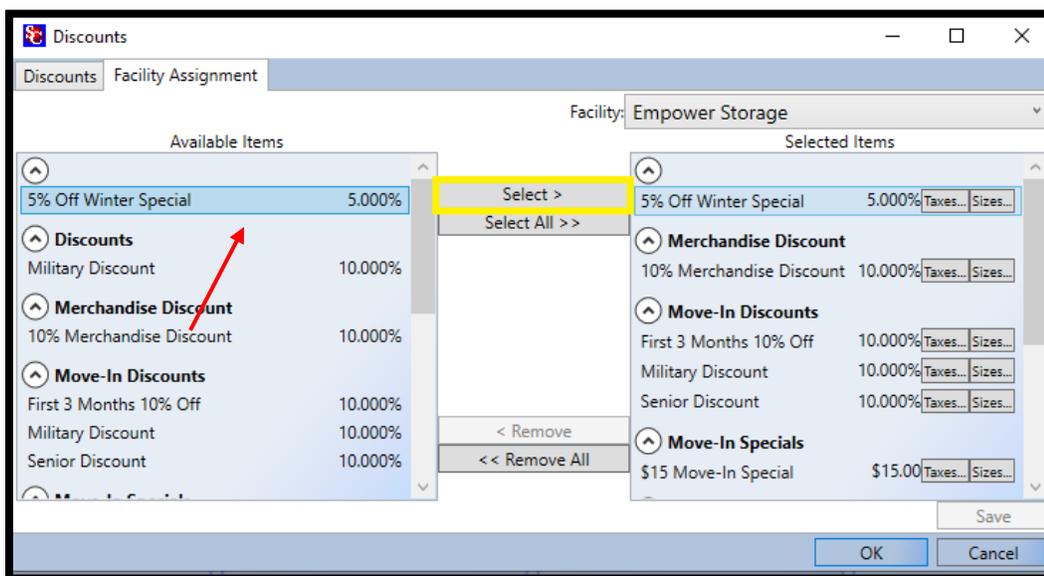
6) Assign the discount to the facility by selecting **Facility Assignment**.



7) Select the facility from the drop-down menu.

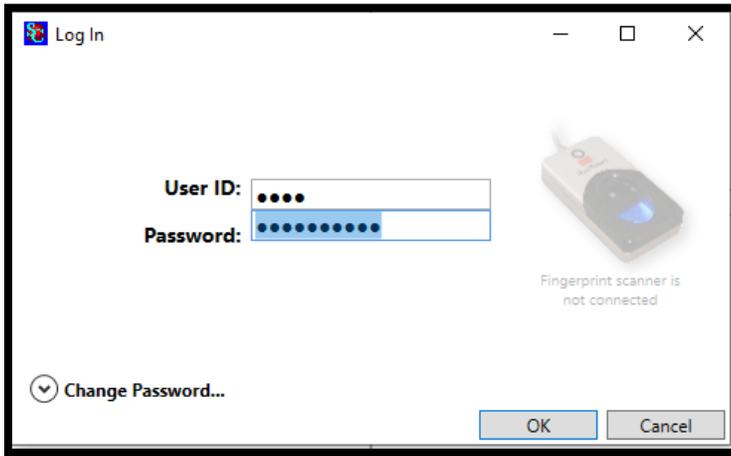


8) **Select** the discount from the list of "Available Items" and press **Select**.

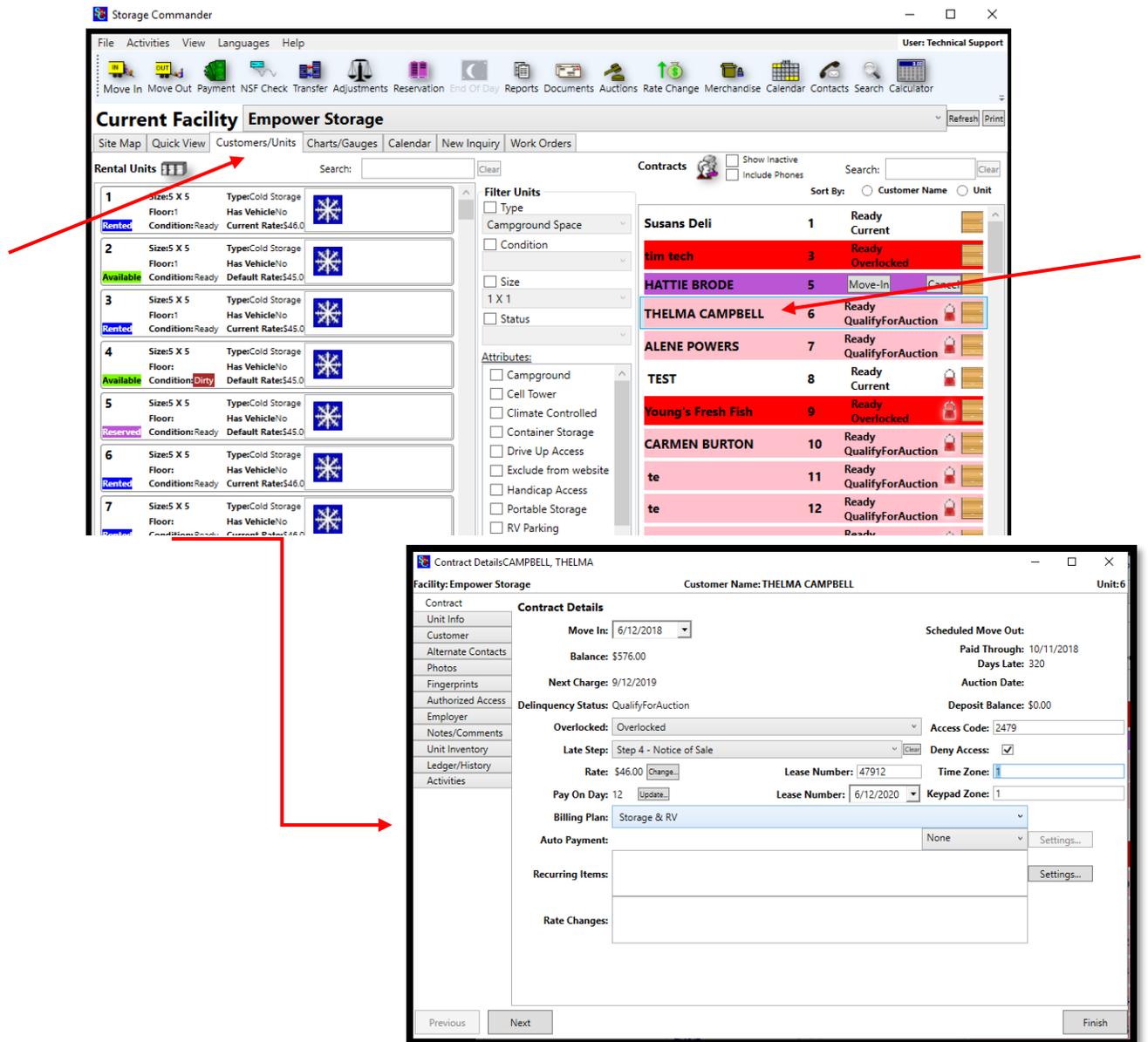


9) Select **OK**.

10) Open and log into Storage Commander with your credentials.



11) Select the **Customers/ Units tab** and search the customer account by unit number or by name. Once the customer is located, click on their name to bring up the customer **Contract Details**. (or right click on the map and select Details...)



12) Locate the **Recurring Items** and select **Settings**.

Contract DetailsCAMPBELL, THELMA
Facility: Empower Storage Customer Name: THELMA CAMPBELL Unit:6

Contract
Unit Info
Customer
Alternate Contacts
Photos
Fingerprints
Authorized Access
Employer
Notes/Comments
Unit Inventory
Ledger/History
Activities

Contract Details

Move In: 6/12/2018 Scheduled Move Out:
Paid Through: 10/11/2018
Days Late: 320

Balance: \$576.00
Next Charge: 9/12/2019
Auction Date:
Deposit Balance: \$0.00

Delinquency Status: QualifyForAuction

Overlocked: Overlocked Access Code: 2479
Late Step: Step 4 - Notice of Sale Clear Deny Access:
Rate: \$46.00 Change... Lease Number: 47912 Time Zone: 1
Pay On Day: 12 Update... Lease Number: 6/12/2020 Keypad Zone: 1

Billing Plan: Storage & RV
Auto Payment: None Settings...

Recurring Items: Settings...

Rate Changes:

Previous Next Finish

NOTE: This box will also show if a customer has insurance.

13) Left-click on the **Discount** that is associated with the customers account and **Select Add**. **Select Ok** and click the **Finish** button in the Contract Details window. If you open the customers detail window again, you should see the discount in the Recurring Items box. Proceed to the next account unless a customer has a prepaid credit in which case proceed to step 14.

Associated Products

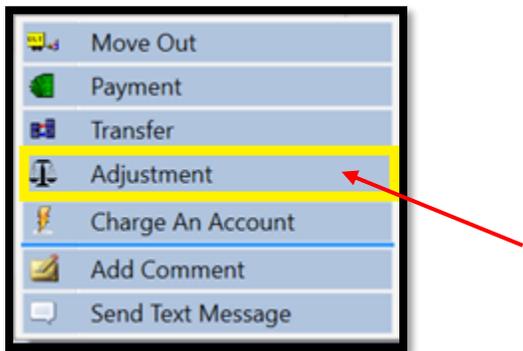
Available Items	Selected Items	Start	End
Discount			
Move-In Specials			
\$15 Move-In Special \$15.00	\$15 Move-In Special \$15.00	8/28/2019	10/28/2019
Promotions			
\$25 Coupon \$25.00			
6th Month 10% Discount 10.00%			
Referral			
\$25.00 Referral Coupon \$25.00			
Merchandise Discount			
10% Merchandise Discount 10.00%			
5% Off Winter Special 5.00%			

Add Delete (The End date will be calculated automatically)

OK Cancel

NOTE: If there is a specific end date, please enter the end date here.

14) In the event a customer has been given prepaid rent credit, but did not have a discount an **Adjustment** will need to be made to correct the account. Right click the customers contract and select **Adjustment**.



15) We will use the following account as an example. Let's say this customer was supposed to receive a 5% recurring discount. Now that the discount has been added, we need to bring the prepaid amount down so that the customer is not given too much credit.

A screenshot of a software window titled 'Adjustment'. The window has a light blue background and contains the following sections:

- Contracts** | **Details**
- Contract Info:**
 - Customer Name: David Powell
 - Unit: 00005
 - Paid Through: 8/2/2019
 - Next Charge: 8/3/2019
 - Rate: \$270.00
 - Current Balance: (\$270.00)
- Past Due and Pre-Paid Items**
 - Anniversary (FC) (\$270.00) Adjustment Amount:
- Account Adjustment**
 - Account:
 - Rent
 - Tax
 - Other
 - Adjustment Amount:
 - New Balance: (\$270.00)
- Explanation:**
- Buttons: Previous, Next, Finish

16) 5% of \$270.00 is \$13.50 so we will deduct that amount from the total. **Check** the box next to the rent amount (in this case it is labeled "**Anniversary (FC)**").

The screenshot shows a software window titled "Adjustment" with a "Contracts" tab selected. The window is divided into several sections:

- Contract Info:** Customer Name: David Powell, Unit: 00005, Paid Through: 8/2/2019, Next Charge: 8/3/2019, Rate: \$270.00, Current Balance: (\$270.00).
- Past Due and Pre-Paid Items:** A table with one row: Anniversary (FC) (\$270.00) Adjustment Amount: \$13.50.
- Account Adjustment:** Account: Rent (selected), Tax, Other. Adjustment Amount: \$0.00, New Balance: (\$256.50).
- Explanation:** An empty text box.
- Navigation:** Previous, Next, and Finish buttons.

A red arrow points to the "Finish" button, which is highlighted in yellow.

NOTE: You can double check the new amount in the "**New Balance**" area as it will reflect the correct amount. Enter an explanation in the box ***required*** and click the **Finish** button. Proceed to the next account.

General Support Information

We're available to help you with any questions that you might have with using Storage Commander. Our software comes with technical support that is available from 7:00am to 5:00pm Monday through Friday **PST**, and Saturdays from 7:00am to 3:30pm **PST**.

Technical Support for Storage Commander:

Technical Support: 951-301-1187

Fax: 877-600-8412

Digital Fax: 951-813-2548

Email: support@storagecommander.com

Website: www.storagecommander.com/support

Sales for Storage Commander:

Front Office: 951-672-6257

Toll Free: 877-672-6257

Fax: 951-600-8412

Digital Fax: 951-813-2548

Email: sales@storagecommander.com

Website: www.storagecommander.com

For additional information and resources please visit our website at: www.storagecommander.com/support