How-To Guide:

Create a Notice

OVERVIEW

This guide provides step-by-step actions for Creating a Notice in the Storage Commander Configuration Manager including:

- Notices and Letters
- Document Editor
- Editing a Notice
- Adding Merge Fields
- Previewing Document
- Importing a Word Document

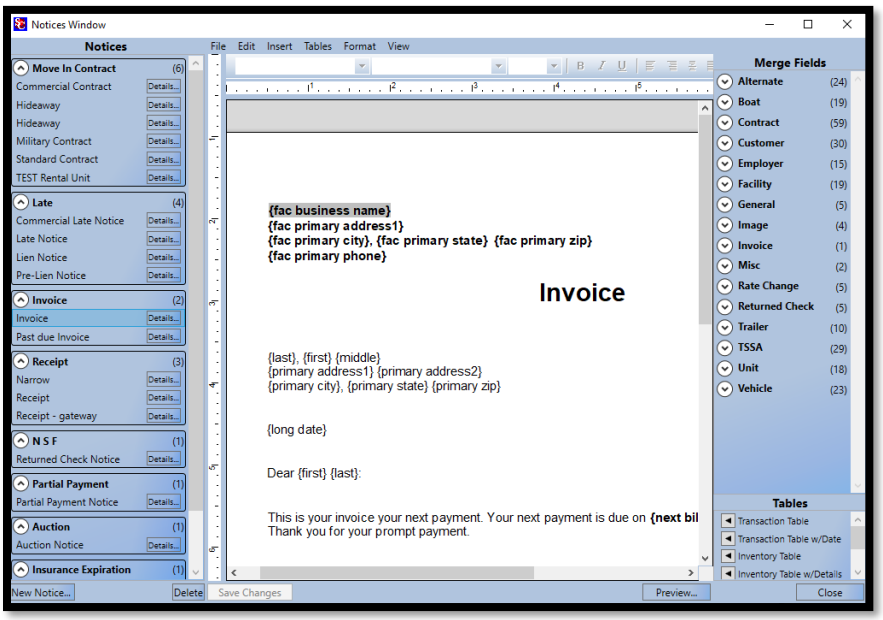
Note: Storage Commander has pre-defined notices that come pre-installed with the software, if you have a notice (Word Document) that is site specific please upload using the Notice tool in the Configuration Manager or contact our Technical Support Team for further assistance.

Notices & Letters

All notices used in Storage Commander can be found in this section. To view or edit any of the notices, ***click*** on the **Notices** button located in the Company Setup section. This will open the ***Notices Window*** where you can view, edit and/or create a new notice or letter.

For the sake of definition any ***printed*** material (with the exception of reports) can be created or edit using this feature. If you look at the ***Notices Window*** you can get an idea of the verity of documents that can be created or edited.

Note: Storage Commander comes with multiple pre-defined notices that can be utilized by any facility.



Document Editor

Locate the document in the **Notices** panel (in the illustration above the Invoice has been selected). This will open the invoice in the editing window, from here you can add or delete text, change text attributes (**bold**, *Italicize* or Underline), change type face, change point size. You can also change paragraph spacing, and set tab stops.
Merge fields can also be inserted into the document or removed from the document. Merge fields allow automatic insertion of specific information contained in the Storage Commander database in to the document. This allows you to develop document templates that contain standardized text (such as late notices or welcome letters and use merge fields to alter the template with specific customer information.

Note: Storage Commander Technical Support team can walk you through this process or can help create these notices for your facility.

Page Setup

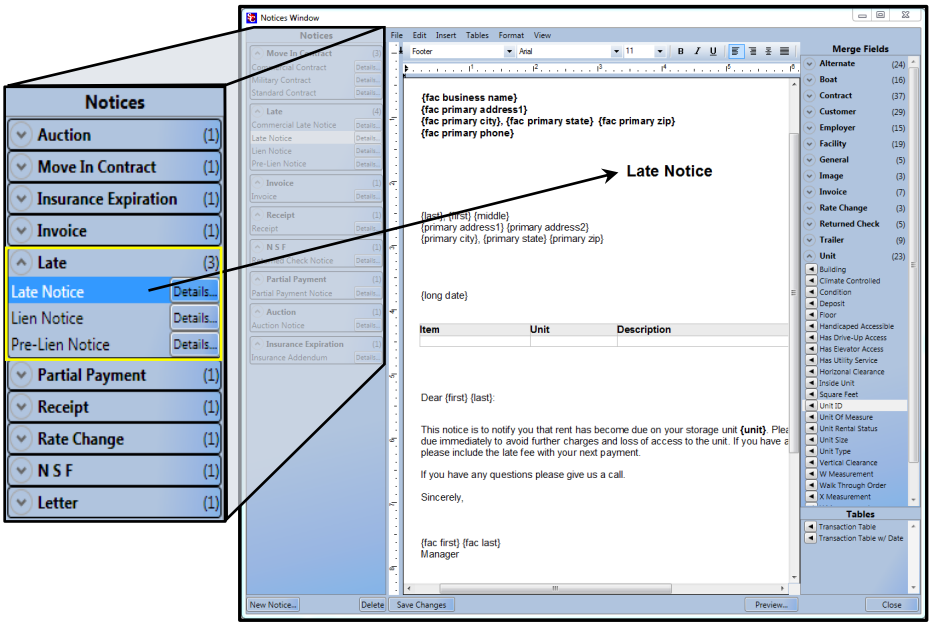
To change the page margins used in the selected document, click on the **File** drop-down menu and select **Page Setup**. From this window you can change margins and paper size of the document and add columns.

Paragraph Setup

To customize the paragraph settings, click on the **Format** drop-down window and select **Paragraph**, from here you will be able to modify the spacing and alignment of the selected paragraph in your document.

Editing a Notice

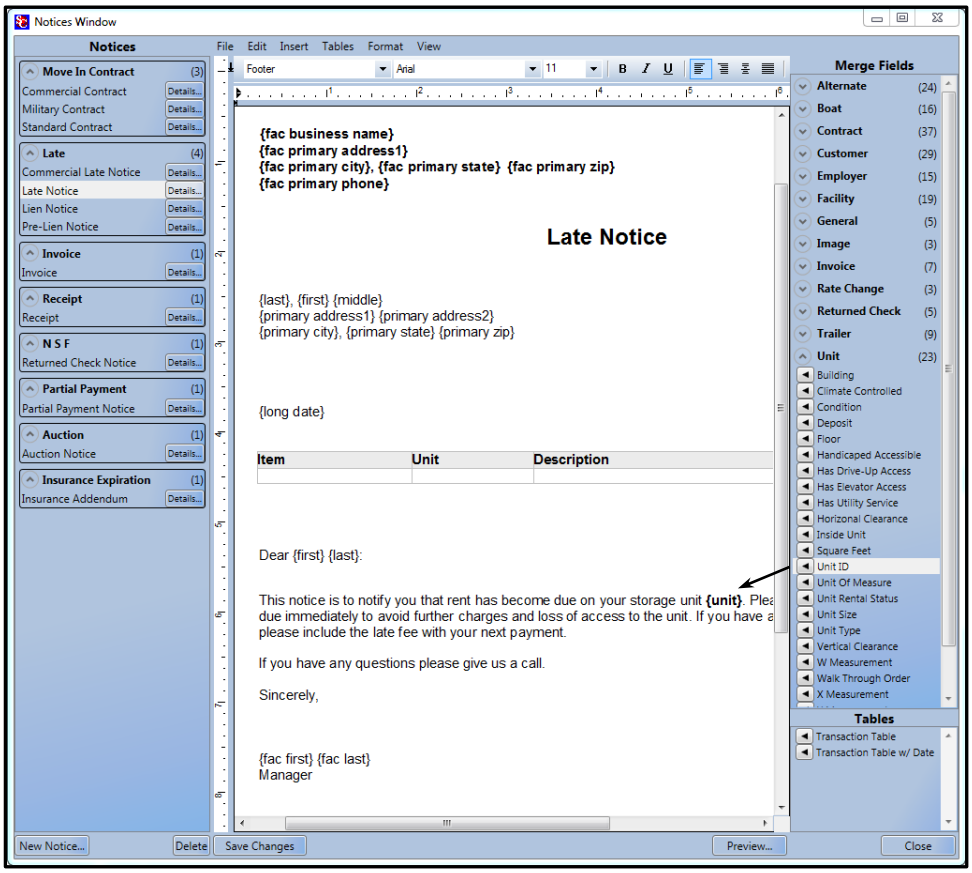
The notices contained in the Notice window are organized by notice type, to the left of each notice type is an arrow button, clicking on the arrow button will expand the list of available documents for the notice type.



Clicking the arrow button again will collapse the list. ***Click*** on the document to open it in the editing window. You can use standard Microsoft Word editing commands to insert new text. Use the tool bar located at the top of the edit window or the Format drop-down menu to change text / paragraph attributes.

Adding Merge Fields

A ***merge field*** can be added anywhere within a document (with the exception of a table) and as many times as needed. To add a ***merge field***, position the editing cursor at the location where the condense of the ***merge field*** are to be placed, move the mouse over the appropriate ***merge field*** category and click on the down arrow to display a list of available merge codes, and **click** on the merge code to be placed into the document.

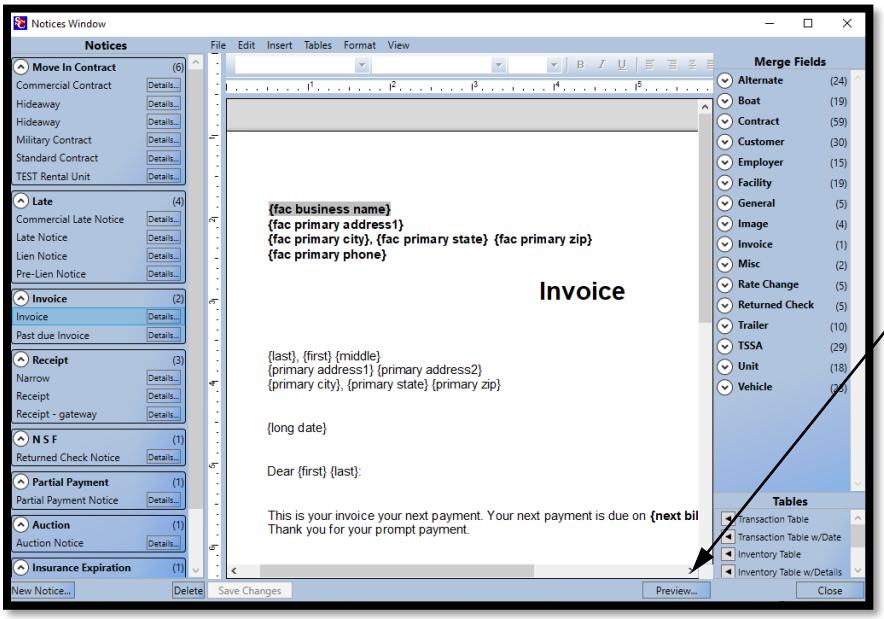


Preview Document

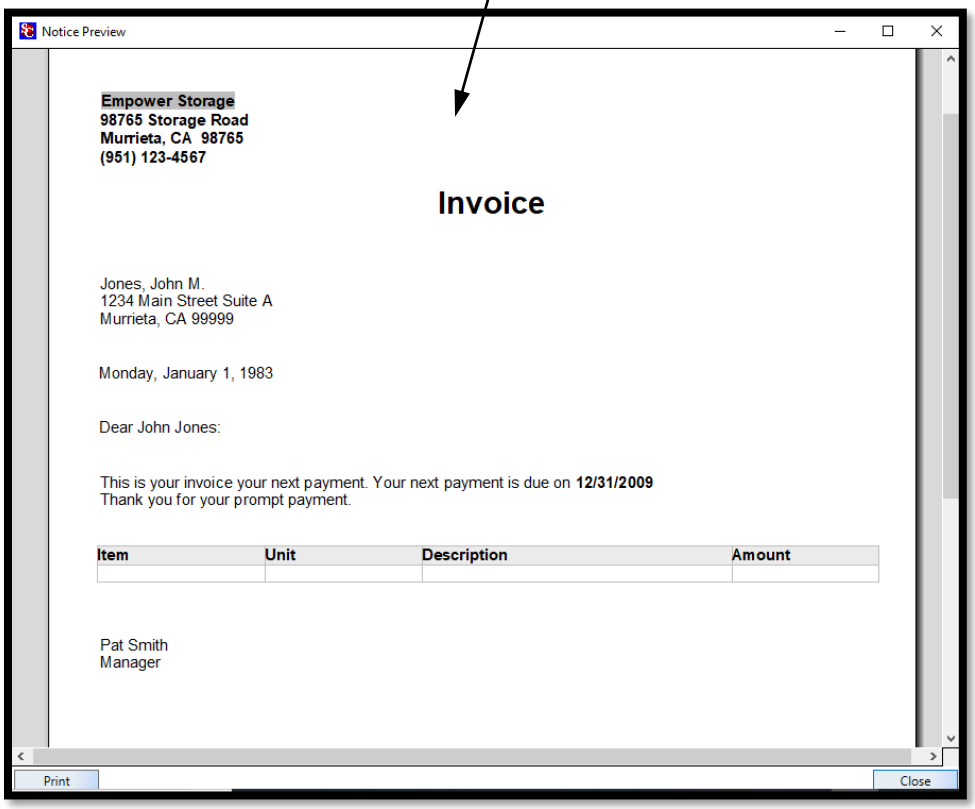
The ***document preview feature*** allows you to see how the document/letter will look like when it is printed or emailed. This is a great way to verify that the document or letters are formatted the way you like prior to sending it to your customers.

Note: When generated with customer information, the document could look different. To verify it looks correct, generate a document through Storage Commander. **Activities | Generate Documents | Select a customer and document | Click generate documents.**

To use preview simply click on the Preview button whenever you would like to see the document/letter.



Click on the Preview button to see a sample of the document with the merge fields filled in with sample data.



Adding Transaction Tables

The transaction table will summarize all past due charges that are currently active on a customer account. Charges that are included in the table are not date range specific meaning that

An example of the Transaction Table is shown below.

Item	Unit	Date	Description	Amount
Type of transaction	Storage unit number	Posting date of transaction items	Description of transaction items	Dollar amount of each transaction item

Item	Unit	Date	Description	Amount
Late Step		**10/11/2014**		
Charge			**Past Due Charges**	
	81	9/26/2014	Military: 9/26/2014	$120.00
	81	9/26/2014	Military Discount: 9/26/2014	($12.00)
			Past Due:	**$108.00**
Charge				
	81	10/11/2014	Late	$10.00
			Subtotal:	**$10.00**
			Ending Balance:	**$118.00**

Note: This transaction table was added to the Late Notice.

Deleting a Merge Field

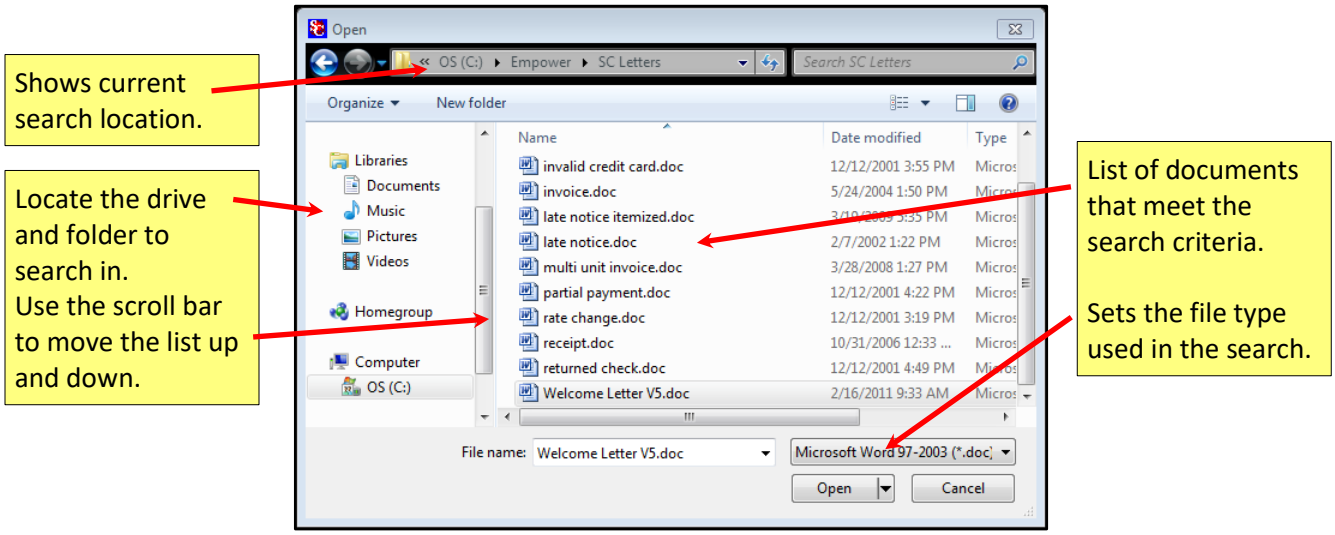
Place the mouse cursor over the target merge field (when the mouse cursor is over a merge field the cursor will change to a pointing finger cursor), using the right mouse button, click one time and select Delete Field.

Modifying Font Attributes in a Merge Field

To modify the default font attribute in a merge field (changing typeface, size, bold, italic, underline), place the editing cursor in front of the curly bracket ({)of the merge field, if you like to use the keyboard for this type of operation (like we do), hold the Shift key down while tapping the right arrow key, to walk the editing cursor through the merge field one character at a time (you can also use the mouse to accomplish the same thing by holding down the left mouse button while moving the mouse through the merge field). Any character that is highlighted can now have its font attribute modified by selecting the font attribute from the tool bar located at the top of the editing screen.

Importing Word Documents

Click on the File drop-down menu and select **Import Word Document**, this will open a Search box, you can import two different file types in a word document format- **.doc** (Word 2003 and older word documents), or **.docx** (Word 2007 and newer word documents). Use the file filter button located in the bottom right of the Search box to show only doc files or docx files. When you see the document in the list box, ***double click*** on it to open it in the editor, or you can click on the document one time and then click on the ***Open button*** to open the document in the Storage commander editor window.



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