



# STORAGE COMMANDER

ONE MANAGEMENT SOFTWARE FOR ANY STORAGE

## How-To Guide:

# Getting Started with SC Pay and Migrating Tenants Credit Cards.

### OVERVIEW

This guide provides step-by-step actions for Getting Started with SC Pay and Migrating Tenants Credit Cards in Storage Commander including:

#### Section 1

- Welcome to SC Pay (A welcome letter from Storage Commander)
- Features of SC Pay

#### Section 2

- The Application and Approval Process
- What is a Migration?
- Just a Few Steps to Complete the Migration
- Tokenizing Credit Cards with SC Pay
  - Online Payment Portal 2.0
  - Storage Commander Software – V5 Client
  - Storage Commander Online – Browser

#### Section 3

- SC Pay Reports- Automated reconciliation

**Note:** If the tenant was enrolled into automatic payment or their card was on file with your old credit card processor, and you need to enroll them through SC Pay than this process will be implemented. If you require additional help, please reach out to our technical support team at 951-301-1187 or [support@storagecommander.com](mailto:support@storagecommander.com).

# Welcome to SC Pay

Welcome to SC Pay Powered by Fullsteam!

Here at Storage Commander Software, we provide an easy, completely integrated payment solution with your management software. SC Pay provides automatic reconciliation for payment with our simple, yet precise, reports. One of our leading edges is an onsite Technical Support Team that has the knowledge and skillset to answer any questions related to our software or credit card platform.

We have put together a quick and easy-to-follow guide that will walk you through the process of getting started with SC Pay and migrating tenants credit cards efficiently. Our amazing team has created multiple ways to transition credit card data during the migration process. These user-friendly tools include: an easy-to-use customer portal for tenants to enroll themselves in automatic payment, enrolling a tenant through a payment in Storage Commander, or enrolling a tenant without payment in their details screen.

In the upcoming sections we will walk you through the guide on how to get started with SC Pay and what steps need to be taken to migrate tenants credit card information over. If you have questions, please feel free to reach out. Our team is available to help you with any questions that you might have. The Storage Commander Technical Support hours of operations are from 7:00am to 5:00pm Monday through Friday **PST**, and Saturdays from 7:00am to 3:30pm **PST**.

From all of us here at Storage Commander, we want you to know that we appreciate your business and look forward to furthering our relationship by getting started with SC Pay!

## Features of SC Pay

There are multiple benefits to moving over to SC Pay! Here is just a handful of benefits to migrating to SC Pay.

- Fully integrated solution for self-storage.
- Potentially better rates that will save you money.
- A one-stop shop for all technical support. Both merchant and software support are handled by the Storage commander team.
- Integrated payments with combined Instant reporting through Storage Commander and the merchant portal (Merchant Track) including but not limited to:
  - **Funding Reconciliation Sum:** This report is used for automatic reconciliation in which it compares batch totals from SC Pay with credit card transactions from Storage Commander in detail.
  - **Funding Reconciliation Detail:** This report is used for automatic reconciliation in which it compares batch totals from SC Pay with credit card transactions from Storage Commander in summary.
  - **Credit Card Exceptions:** If for some reason there is a discrepancy, this report will list transactions from SC Pay that do not match Storage Commander Reports.
  - **Funding Detail Report:** List funding deposits with details for SC Pay.
- Quick and easy reconciliation between Storage Commander and SC Pay.

**IMPORTANT NOTE:** For a detailed view of these reports please see **section 3** of this document or the [Storage Commander Report Book](#).

# The Application and Approval Process

To utilize SC Pay in Storage Commander for all payment processing your facility owner must apply. This is accomplished by reaching out to your Storage Commander Account Manager to start the application/ approval process.

Here is a quick breakdown of the process/timeline of the SC Pay application and approval process.

- 1) Storage Commander sends a quote to the facility owner.
- 2) Quote is approved, application is emailed. [How to Apply- Storage Commander Pay](#).
- 3) Application is submitted and goes to approval stage. (1-2 days)
- 4) Merchant is setup, welcome email from SC Pay is sent and terminal is shipped (1-3 days) [MerchantTrack User Creation](#).
- 5) Storage Commander Technical Support Team assists with terminal setup, test transaction's and a quick training on the [MerchantTrack](#) portal (30 min) is performed.
- 6) You are live!

## What is a Migration?

When you change payment processors, the credit card information stored in your current processor is not stored in your future processor (SC Pay). To change processors seamlessly, your tenants will be required to re-enter their credit card information (tokenize their credit card information). This simply updates SC Pay with the tenants' credit card credentials and allows for "automatic payments" and "cards on file" to be charged.

## Just a Few Steps to Complete the Migration

Our team has created multiple tools to make the transition as seamless as possible for a facility manager. With that being said, your tenant will do the majority of the work for you but for your convenience there are several ways to collect credit card data. The migration process is much simpler than it may seem, but were here to tell you we have narrowed down the steps to just a few!

- 1) Identify which tenants are enrolled into automatic payment by running the Storage Commander Report named: **Auto Payments** and/or the report **Auto Payments by Processor** created just for our facilities migrating to SC Pay! These reports can be found in the Storage Commander reporting tool under the **Contract** drop down.
- 2) Storage Commander will provide you a link to send to your tenants and to host on your website, which will instantly direct them to re-register (tokenize) their card with SC Pay. <https://onlinepayments.storagecommander.net/>
- 3) Generate the notice [Auto CC Letter for SC Customers](#) to all automatic payment tenants by simply selecting the option that says "Select AutoPay's". For more info on generating notices please refer to the [How- to Generate Notices](#).
- 4) Send notice via email or paper.
- 5) Tokenize tenants credit cards!

**QUICK TIP:** Track all tenants enrolled into Auto Payments by pulling the report **Auto Payments by Processor**. This will help determine if a follow-up letter is necessary. If so, generate the notice [2<sup>nd</sup> Auto CC Letter- SC Pay](#) and send to all automatic payment tenants.

**NOTE:** Our team of specialists created a flawless solution that allows your facility to run your current processor and SC Pay in parallel. All new tenants and tenants who pay in person will be processed through your SC Pay terminal. All automatic payment tenants will be processed through your current processor until all tenants have migrated over to SC Pay via tokenization.

# Tokenizing Credit Cards with SC Pay

Tokenization makes the process of accepting payments easier and more secure for you and your tenants. Tokenization is more than just security as it helps create a smooth payment experience. The experts on our team have produced user-friendly tools to tokenize credit cards on the SC Pay Platform. Below are some scenarios in which tokenization will be slightly different, but we have put together this guide to walk you through the process. Please see below for details.

## Online Payment Portal 2.0

### Scenario 1 - Tenant Using the Online Portal

The tenant receives the notice [Auto CC Letter for SC Customers](#) that our team has created for you. They click on the link from the letter <https://onlinepayments.storagecommander.net/> and are directed to update their credit card information online. This process is completed in 6 easy steps. Below is the tenant view for updating their credit card online.

**IMPORTANT NOTE:** If the customer wants to update their autopay information online, it is **REQUIRED** to create an account in the Online Payment Portal 2.0.

1. Create an account in the Online Payment Portal IF they haven't done so already.

**NOTE:** If the customer already has an account in the Online Payment Portal, they will log in with their Username and Password and jump to step 4.

2. Enter one of your **unit numbers** in the “Enter Unit” field and your corresponding Gate Code in the “Gate Code” field and click **Verify**.

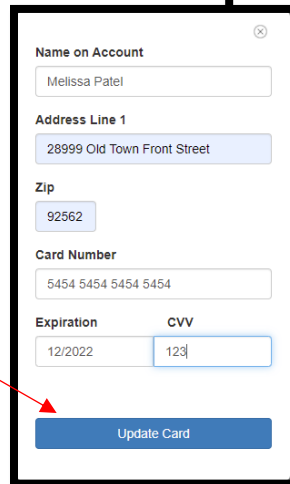
**NOTE:** If the tenant has multiple units, they only need to enter one-unit number to update ALL units.

3. The customer will enter their **email address**, **password** and **confirm** their information and create their account with the Online Payment Portal 2.0. Click **Create Account**.

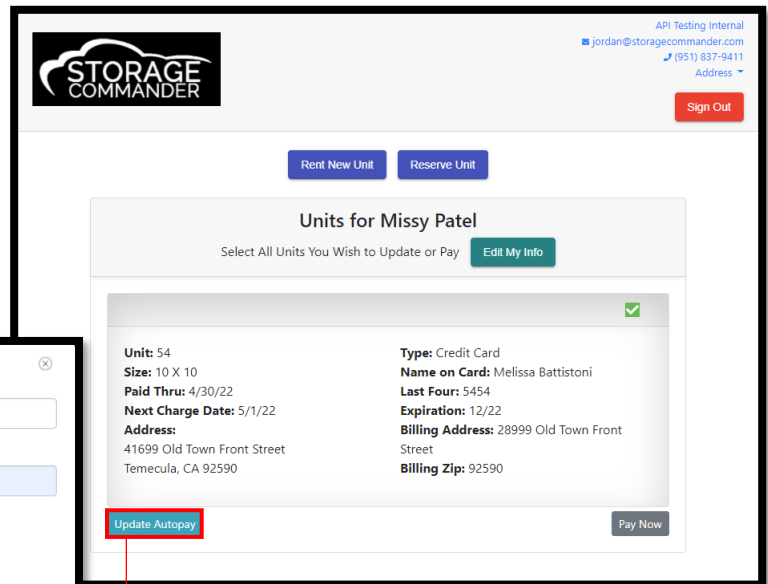
4. Check the boxes next to the unit(s) that you are wanting to change the automatic payment information on and select “Update Autopay”

5. The Credit Card information screen will pop up and you will enter the name on the account, address, billing zip code, card number, expiration and CVV.

**NOTE:** If the unit already has a credit card attached for automatic monthly payments, it is still **REQUIRED** to update the card with SC Pay. If there is NOT a card setup the message will say “There is currently no autopay on this unit” will be displayed.



A form for updating credit card information. It includes fields for Name on Account (Melissa Patel), Address Line 1 (28999 Old Town Front Street), Zip (92562), Card Number (5454 5454 5454 5454), Expiration (12/2022), and CVV (123). A blue 'Update Card' button is at the bottom. A red arrow points from the 'Update Card' button to the 'Update Autopay' button in the adjacent screenshot.



The Storage Commander web interface for Missy Patel. It shows a list of units with a table containing unit details. The 'Update Autopay' button is highlighted with a red box. A red arrow points from this button to the 'Update Card' button in the adjacent screenshot.

Unit	Type	Name on Card	Last Four	Expiration	Billing Address	Billing Zip
Unit: 54 Size: 10 X 10 Paid Thru: 4/30/22 Next Charge Date: 5/1/22 Address: 41699 Old Town Front Street Temecula, CA 92590	Credit Card	Melissa Battistoni	5454	12/22	28999 Old Town Front Street	92590

6. Click the “Update Card” button when finished. If there are any issues adding the card to your account, there will be red text displayed below the Expiration and CVV boxes stating the reason(s).

**Your card will not be charged during this process – this will only update the card for your next billing cycle.**

**NOTE:** A small **green** notification will appear confirming the card was added to your selected unit(s) successfully. You will be redirected to the verification screen, and you should see the new card information to the right.

## Storage Commander Software - V5 Client

### Scenario 1 - Updating Credit Card During **Payment in Person**

A tenant comes into your location to make a payment on their unit. At this point you will enroll the tenant into Automatic Payment, on the payment screen by click the check box next to **Enroll Automatic Payment** and then select Scan Card. This will allow you to insert the card into the terminal for payment, which will tokenize their credit card with SC Pay.

To update your automatic payment, you first must **REMOVE** your old card on file. Click the **Select Prior Card** drop down and select **Remove**.

If this card will be used to automatically pay rent each billing cycle, select **Enroll Automatic Payment**.

### Scenario 2 - Updating Credit Card During **Payment Over the Phone**

A tenant comes calls your location to make a payment on their unit. At this point you will enroll the tenant into Automatic Payment, on the payment screen by click the check box next to **Enroll Automatic Payment** and clicking **Manually Enter Card** and proceeding to select Scan Card. This will allow you to manually enter the card number on the terminal for payment, which will tokenize their credit card with SC Pay.

To update your automatic payment, you first must **REMOVE** your old card on file. Click the **Select Prior Card** drop down and select **Remove**.

If this card will be used to automatically pay rent each billing cycle, select **Enroll Automatic Payment**.

### Scenario 3 - Updating Credit Card **WITHOUT** Making a Payment

A tenant comes calls your location or comes in during the middle of the month and wants to update their credit card. At this point you will need to enroll the tenant into Automatic Payment without charging them. This is processed through the Customer Details page.

To enroll a tenant into **Automatic Payment** without charging them, on the **Customer Contract Details** screen the click the drop-down menu next to Auto Payment. **Select Credit Card**. Then click Setting.

Enter the credit card information and **select scan card**, once authorized select **OK**.

To update your automatic payment, you first must **REMOVE** your old card on file. Click the **Select Prior Card** drop down and select **Remove**.

**IMPORTANT NOTE:** Do not select the drop-down menu "Select Prior Card" as it will **NOT** tokenize the credit card information and the card on file will not be valid.

## Storage Commander Online – Browser

### Scenario 1 - Updating Credit Card During **Payment in Person**

A tenant comes into your location to make a payment on their unit. At this point you will enroll the tenant into Automatic Payment, on the payment screen by click the check box next to **Enroll Automatic Payment** and then select Scan Card. This will allow you to insert the card into the terminal for payment, which will tokenize their credit card with SC Pay.

To update your automatic payment, you first must **REMOVE** your old card on file. Click the **Select Prior Card drop down** and select **Remove**.

If this card will be used to automatically pay rent each billing cycle, select **Enroll Automatic Payment**.

The screenshot shows the 'Payment' screen in the Storage Commander interface. The 'Payment Options' tab is active, showing 'Cash', 'Check', and 'Credit/Debit' (selected). The 'Select Prior Card' dropdown is set to '545454 ... 5454 exp: 08/22', with a 'Delete' button next to it. The 'Billing Address' is 'John Smith', '28999 Old Town Front Street', and '92590'. The 'Amount' is '\$ 15'. The 'Enroll Automatic Payment' checkbox is checked. The 'Submit' button is at the bottom right. Red arrows point from the text instructions to the 'Delete' button, the 'Enroll Automatic Payment' checkbox, and the 'Submit' button.

### Scenario 2 - Updating Credit Card During Payment **Over the Phone**

A tenant comes calls your location to make a payment on their unit. At this point you will enroll the tenant into Automatic Payment, on the payment screen by click the check box next to **Enroll Automatic Payment** and clicking **Manually Enter Card** and proceeding to select Scan Card. This will allow you to manually enter the card number on the terminal for payment, which will tokenize their credit card with SC Pay.

To update your automatic payment, you first must **REMOVE** your old card on file. Click the **Select Prior Card drop down** and select **Remove**.

If this card will be used to automatically pay rent each billing cycle, select **Enroll Automatic Payment**.

The screenshot shows the 'Payment' screen in the Storage Commander interface. The 'Payment Options' tab is active, showing 'Cash', 'Check', and 'Credit/Debit' (selected). The 'Select Prior Card' dropdown is set to '545454 ... 5454 exp: 08/22', with a 'Delete' button next to it. The 'Billing Address' is 'John Smith', '28999 Old Town Front Street', and '92590'. The 'Amount' is '\$ 15'. The 'Enroll Automatic Payment' checkbox is checked. The 'Submit' button is at the bottom right. Red arrows point from the text instructions to the 'Delete' button, the 'Enroll Automatic Payment' checkbox, and the 'Submit' button.



### Scenario 3 - Updating Credit Card **WITHOUT** Making a Payment

A tenant comes calls your location or comes in during the middle of the month and wants to update their credit card. At this point you will need to enroll the tenant into Automatic Payment without charging them. This is processed through the Customer Details page.

To enroll a tenant into **Automatic Payment** without charging them, on the **Customer Contract Details** screen the click the drop-down menu next to Auto Payment. **Select Credit Card**. Then click Settings.

Facility: Storage Commander Software  
Unit: 1

Customer Name: Jordan Maldonado  
Customer Number(s):

Delinquency Status: Current  
PTD: 07/31/2023 | Balance: (\$314.75)

**Contract Details**

Moved In: 9/13/2022

Balance: -\$314.75

Next Charge: Aug 1, 2023

Delinquency Status: Current

Overlocked: Not Overlocked

Late Step: None

Rate: \$29

Apply

Update...

Lease Number: 2102

Lease Expiration: 9/13/2022

Pay On Day: 0

Billing Plans: 1st Of Month (Day 1 only)

Auto Payment: Mastercard 545454...5454 Test 1

Auto Payment Type: Credit Card

Settings...

**Recurring Items**

Settings...

Burglary (\$1,000 @ 50%) Start: Mar 28, 2018 End: \$6.95

\$5,000 Coverage Limit / \$15.00 Monthly Premium Start: Sep 13, 2022 End: \$15.00

**Rate Changes**

Send Gate Info

To update your automatic payment, you first must **REMOVE** your old card on file. Click the **Select Prior Card** drop down and select **Remove**.

Select **"Manually Enter Card"** to hand key the billing information and the card number, expiration and CVV and click submit.

Press **OK** to save the changes.

**Set up Autopay**

Select Prior Card: 545454 ... 5454 exp: 20/37

Delete

Manually Enter Card

Ok

**Manually Enter Card**

Name on Account

Address Line 1

Zip

Card Number

Expiration: MM/YY CVV

Submit

# SC Pay Reports

As part of the fully integrated solution for self-storage, Storage Commander offers combined reporting with SC Pay. Please see below for in depth details on what is included on each report.

## Funding Reconciliation Summary (Bank Reconciliation)

Lists all transactions from Storage Commander collated with the funding details, which will assist in reconciling your bank deposits. This report will save a significant amount of time when reconciling the transactions at the site with the transactions from the processor and finally the deposits in the bank. The left half of the report groups the transactions by the processing date which will match the daily totals in Storage Commander. The right half of the report totals by the deposit batch that will match the deposits into the bank account. Transactions that have not yet deposited will show as “pending” in place of a deposit id. This report is available in both a Detail and Summary version.

Sample Self Storage						SCPay Bank Reconciliation				
						Friday, January 10, 2020*				
Location Code	Transaction Date	Order Id	Unit	Transaction Amount	Funding Amount	Transaction ID	Deposit Date	Last Four	Name On Card	Card Type
Main St	1/8/2020 12:14:55PM	50519	5077	\$55.68	\$0.00	45518192	1/10/2020	9867	STEVEN SMITH	MasterCard
Main St	1/8/2020 12:16:33PM	50520	3155	\$254.00	\$55.68	45518922	1/10/2020	841	Frank Maker	Visa
Main St	1/8/2020 1:48:10PM	50560	3263	\$130.00	\$254.00	45576008	1/10/2020	2054		MasterCard
Main St	1/8/2020 1:49:05PM	50561	3263	\$51.00	\$130.00	45576738	1/10/2020	8865		Visa
Main St	1/8/2020 4:41:09PM	50611		\$12.99	\$51.00	45666236	1/10/2020	5803	MASTERS/PAUL	Visa
Main St	1/8/2020 5:15:58PM	50622	3018	\$57.00	\$12.99	45684048	1/10/2020	8068	WESTERNMAX	Visa
Main St	1/8/2020 8:01:54PM	50633	3240	\$197.00	\$57.00	45770042	1/10/2020	6146	Jack S Rider	Discover
Storage Commander 1/8/2020				Total	\$757.67					
						Deposit Id:	48239	1/10/2020	Deposit Total:	\$757.67
Main St	1/9/2020 9:17:05AM	50658		\$36.45	\$197.00					Visa
Main St	1/9/2020 10:40:27AM	50695	3238	\$444.00	\$0.00					MasterCard
Main St	1/9/2020 2:10:54PM	50751	3334	\$160.00	\$0.00					Visa
Main St	1/9/2020 4:07:17PM	50800	3245	\$257.00	\$0.00					Visa
Storage Commander 1/9/2020				Total	\$897.45					
Main St	1/10/2020 5:57:25AM	50855	5071	\$198.00	\$0.00					Visa
Main St	1/10/2020 11:01:43AM	50943	4117	\$61.96	\$0.00					MasterCard
Main St	1/10/2020 1:45:45PM	51004	3050	\$157.75	\$0.00					Visa
Main St	1/10/2020 1:49:54PM	51006	5020	\$130.00	\$0.00					MasterCard
Main St	1/10/2020 2:44:20PM	51039	5084	\$87.00	\$0.00					Visa
Main St	1/10/2020 4:29:47PM	51081	3112	\$229.00	\$0.00					Visa
Main St	1/10/2020 10:05:34PM	51150	3304	\$152.00	\$0.00					Visa
Storage Commander 1/10/2020				Total	\$1,015.71					
						Deposit Id:	Pending		Deposit Total:	\$0.00

## Credit Card Exception

Lists transactions that are only in Storage Commander or only in SC Pay, but not both. It also includes any transactions that exist in both systems but have a different balance. This report will help identify transactions that were reversed but the charge was not voided, transactions with manually entered approval information, and partial approved transactions.

Sample Self Storage

Credit Card Exceptions

January 1, 2020 to January 13, 2020

Transactions in SC Pay - Not In/Balanced with Storage Commander

Location	Date	Order Id	Unit	Customer Name	Status	Amount Charged SC Pay	Amount Reported S.C.	Name On Card	Message
Main St	1/10/2020 6:27:46AM	50969			Batched	\$1.00		Frank Jeep	
First St	1/2/2020 8:04:56AM	46292			Batched	\$207.00		KIMBERLY/D JOHNSON	
North	1/13/2020 4:21:25AM	51356			Batched	\$49.95		RICHARD JONES	

Transactions in Storage Commander - Not In SC Pay

Location	Date	Order Id	Unit	Customer Name	Amount	Description	Approval Code	Payment Result	Entered By
North	1/2/2020 2:25:57PM	47299	2031	Jones, Kim	207.00	Unknown...0079: \$207.00	343517	Phone	D Trump

## Funding Detail

Lists details for all transactions that make up a deposit by the funding date, deposit id, combined with the Storage Commander unit information. The deposit totals will match the bank deposit and tie the unit numbers to deposit details.

Sample Self Storage						SCPay Funding Detail			
						January 11, 2020 to January 12, 2020			
Location Code	Transaction ID	Deposit Date	Transaction Date	Order Id	Unit	Transaction Amount	Last Four	Name On Card	Card Type
<b>Deposit Id: 48649</b>									
North	45846692	1/13/2020	1/9/2020 3:17:44AM	50658		\$36.45	380	GRAHAM/JERSY	Visa
North	45880637	1/13/2020	1/9/2020 4:41:18AM	50695	3238	\$444.00	6319	BROWN/JIM M	MasterCard
North	46000211	1/13/2020	1/9/2020 8:10:55AM	50751	3334	\$160.00	6273		Visa
North	46065327	1/13/2020	1/9/2020 10:07:18AM	50800	3245	\$257.00	6264	Larry Long	Visa
<b>Deposit Total:</b>						<b>\$897.45</b>			
<b>Deposit Id: 49009</b>									
North	46265493	1/13/2020	1/9/2020 11:57:28PM	50855	5071	\$198.00	143	Betty A Rover	Visa
North	46351049	1/13/2020	1/10/2020 5:02:46AM	50943	4117	\$61.96	4763	MARIA/KIPP	MasterCard
North	46476244	1/13/2020	1/10/2020 7:46:21AM	51004	3050	\$157.75	8169	JONES JR/RICH E	Visa
North	46478945	1/13/2020	1/10/2020 7:50:36AM	51006	5020	\$130.00	581	FASTER/JAMES	MasterCard
North	46517854	1/13/2020	1/10/2020 8:44:23AM	51039	5084	\$87.00	4463	Sara Connor	Visa
North	46595964	1/13/2020	1/10/2020 10:29:48AM	51081	3112	\$229.00	8664	Smith	Visa
<b>Deposit Total:</b>						<b>\$863.71</b>			
<b>Total:</b>						<b>\$1,761.16</b>			

## Credit Card Daily Transactions

This report lists credit card transactions, both successful and failed from SC Pay. Includes locations, date and time, order ID, unit, Transaction amount, status, transaction ID, approval code, card number, name on account and card type.

401 Storage

SCP Pay Daily Transactions

Tuesday, June 30, 2020

Location	Transaction Date	Order Id	Unit	Transaction Amount	Status	Transition Id	Approval Code	Card Nbr	Name On Account	Card Type
	6/30/2020 10:18:55AM	47	608	\$482	Failed	203122929	2999 - Cancelled			
	6/30/2020 10:19:54AM	48	608	\$150	Batched	203124681	141494	413572 ...2604	MASTER/GORNOSTAI RI	Visa
	6/30/2020 3:02:56PM	63	767	\$400	Batched	203881399	07527G	415417 ...7166	Angelica Penta	Visa
Batched Count		3	Batched Total		\$550.00					
Location Batched Total				\$550.00						

## 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](mailto:support@storagecommander.com)

Website: [www.storagecommander.com/support](http://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](mailto:sales@storagecommander.com)

Website: [www.storagecommander.com](http://www.storagecommander.com)

For additional information and resources please visit our website at: [www.storagecommander.com/support](http://www.storagecommander.com/support)