STORAGE COMMANDER
ONE MANAGEMENT SOFTWARE FOR ANY STORAGE

How-To Guide:

Use DocuSign

OVERVIEW

This guide provides step-by-step actions for using DocuSign for e-signature in person or utilize the Online Payment Portal 2.0 including:

- Auto Generating Gate Access Codes
- DocuSign Process During Move-in
- DocuSign Process using the Online Payment Portal 2.0 (Tenant View)

Note: If the tenant would like to make a payment online, they will need to create a username and password and have their gate code readily available for initial account creation. If you require additional help, or have questions please reach out to our technical support team at 951-301-1187 or support@storagecommander.com.
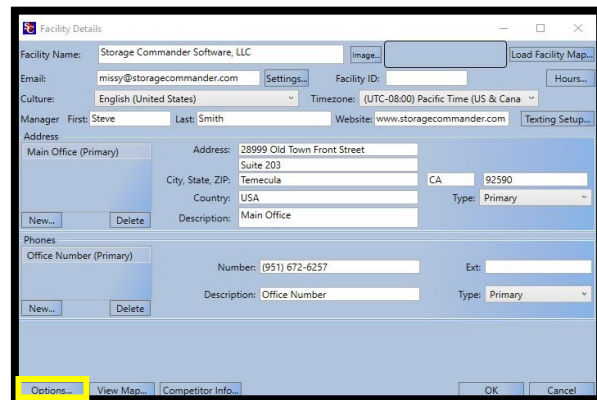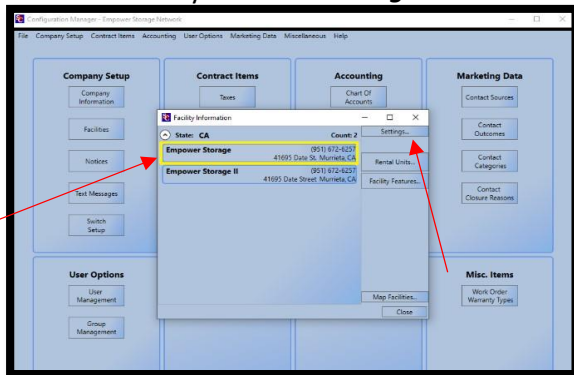
Overview

To utilize DocuSign in Storage Commander to send agreements for electronic signature you must first sign up for the service by letting your Storage Commander Account Manager know as it is required to be on the Elite Package. Once signed up, our team will setup your lease agreement with the correct DocuSign fields and your DocuSign process will be live.
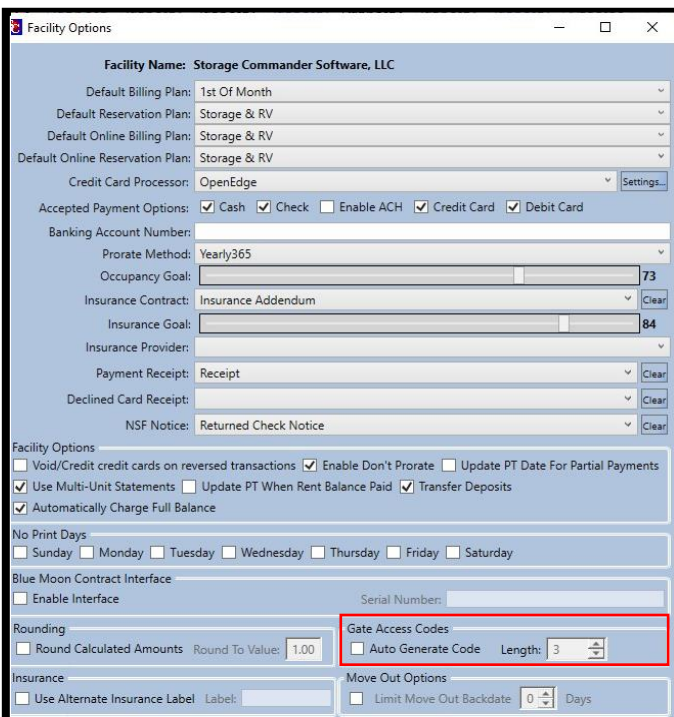
Auto-generating Gate Access Codes

If you are going to allow your customer to make payments via the Online Payment Portal, a onetime gate access codes are required for online account creation. To allow Storage Commander to auto-generate gate access codes for move-ins you must follow the steps below. This is accomplished by navigating to Storage Commander Configuration Manager and clicking the **"Facilities"** icon. The Storage Commander Customer Support Team can help assign all current tenants with a gate code. Please reach out via phone or email for additional help. If you are interested in integrated gate software, please visit our website at https://www.storagecommander.com/partnerexchange/

NOTE: If you do not have a gate at your facility, the gate access code is still required for the initial create of an online account. In your case, this essentially be a "Unique Identifier".

1. Select the facility and click *Settings.*

2. Select the *Settings* button next to the email address.

3. **Click** the box *Auto Generate Code* and select the desired **length** of gate code.

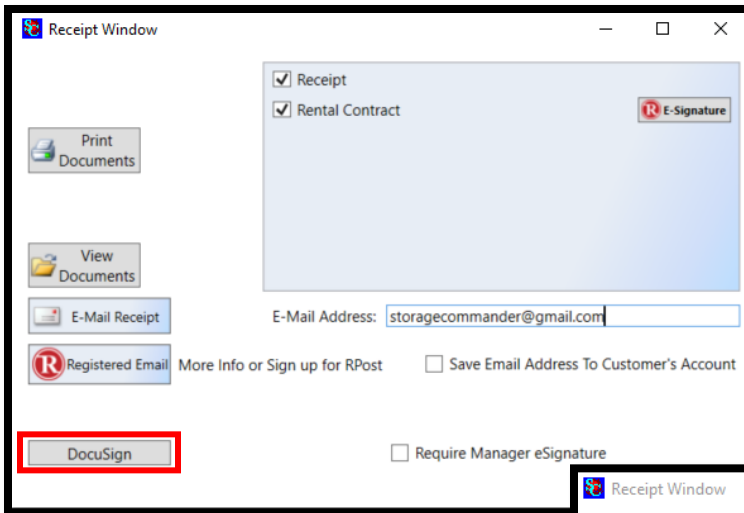*NOTE:* Some gate software's require a specific code length, please check with your gate provider.

4. Select **Close** to save all changes.

DocuSign Process During Move-in

To utilize DocuSign in Storage Commander during *Move-In* for electronic signature's you must follow the steps below. For additional information on the *Move-In* process please see the Storage Commander Operations Manual.

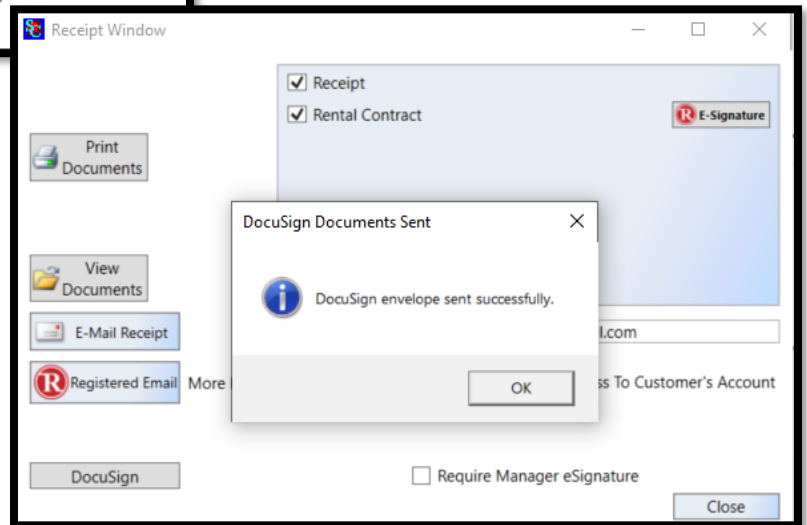*SPECIAL NOTE:* DocuSign is __ONLY__ available during the move-in process.

1. From the **Receipt Window** check the box next to the item that needs to be sent via registered mail for electronic signature.
2. Click **DocuSign** to send the contract out to the customer for signature.

NOTE: All documents in the receipt window will be sent to the tenant, but the only document requiring a signature is the rental contract and/or addendums.

Special Note: If you would like to require a manager's signature, please check the box "Require Manager eSignature".

3. Once the document sends, you will receive a notification that stated **"DocuSign envelope sent successfully"**

4. To verify the document sent, navigate to the customers **Contract Details | Ledger/ History.**
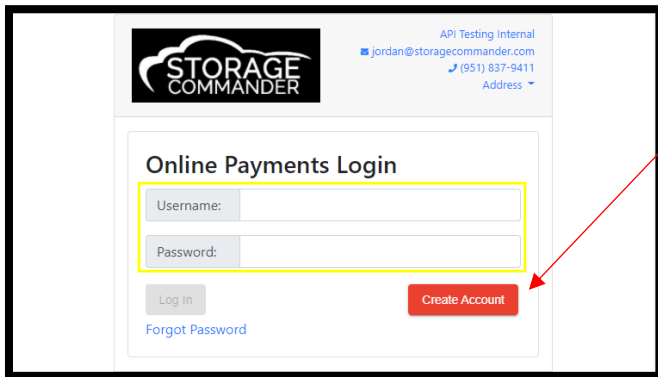
NOTE: When the customer signs the agreement via DocuSign, this document will be **REPLACED** with the signed agreement.

DocuSign Process Using the Online Payment Portal 2.0 (Tenant View)

Facilities can give their tenants the option to complete a move in, payment, and enroll into automatic payments online through the Storage Commander Online Payment Portal 2.0. When a tenant would like to make payments through the Online Payment Portal 2.0, they must create an account.

IMPORTANT NOTE: It is **REQUIRED** for tenants to create an account for customer to utilize 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 tenant 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.

ADDITIONAL NOTE: If the tenant does not have a current unit with the facility, they are still required to create an account for a new move in or reservation.

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

Enrolling Into Autopay
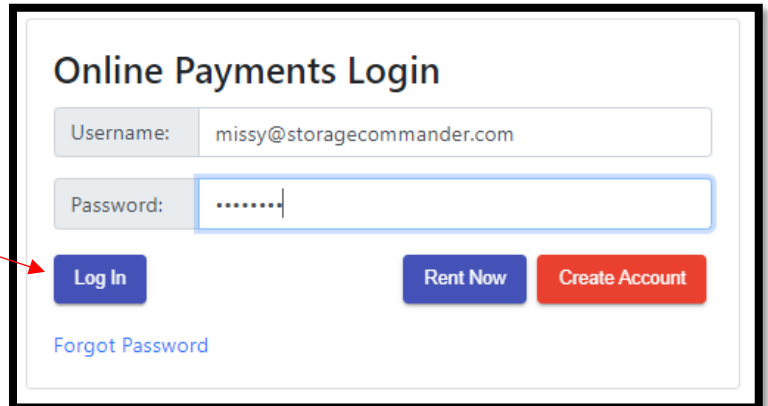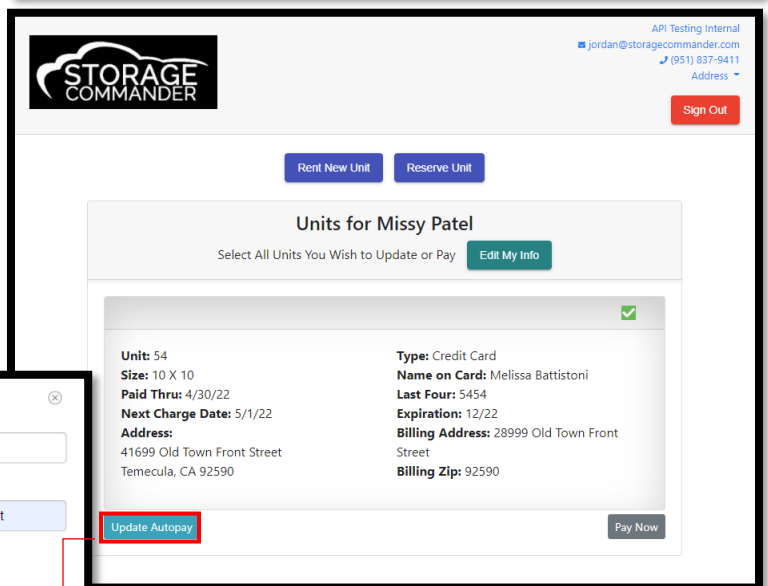
Tenants can update their credit card information online through the Storage Commander Online Payment Portal 2.0. This process is completed in couple easy steps. Below is the tenant view for updating their credit card online.

Online Payments Login

Username:	missy@storagecommander.com
Password:	••••••••

Log In   **Rent Now**   **Create Account**

Forgot Password

1. Enter username and password and click "Log In".

2. Once logged in, **Check the box** next to the unit(s) that you are wanting to change the automatic payment information on and select "**Update Autopay**"

3. 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.

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API Testing Internal
jordan@storagecommander.com
(951) 837-9411
Address ▾

Sign Out

Rent New Unit   **Reserve Unit**

Units for Missy Patel
Select All Units You Wish to Update or Pay   **Edit My Info**

☑

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

Type: Credit Card
Name on Card: Melissa Battistoni
Last Four: 5454
Expiration: 12/22
Billing Address: 28999 Old Town Front Street
Billing Zip: 92590

Update Autopay   **Pay Now**

Name on Account
Melissa Patel

Address Line 1
28999 Old Town Front Street

Zip
92562

Card Number
5454 5454 5454 5454

Expiration   **CVV**
12/2022   123

Update Card

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.

4. 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.

Making a Payment

Tenants can update their credit card information online through the Storage Commander Online Payment Portal 2.0. This process is completed in couple easy steps. Below is the tenant view for updating their credit card online.
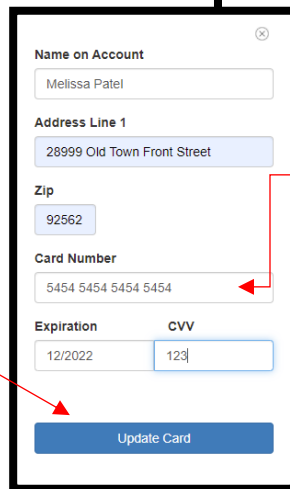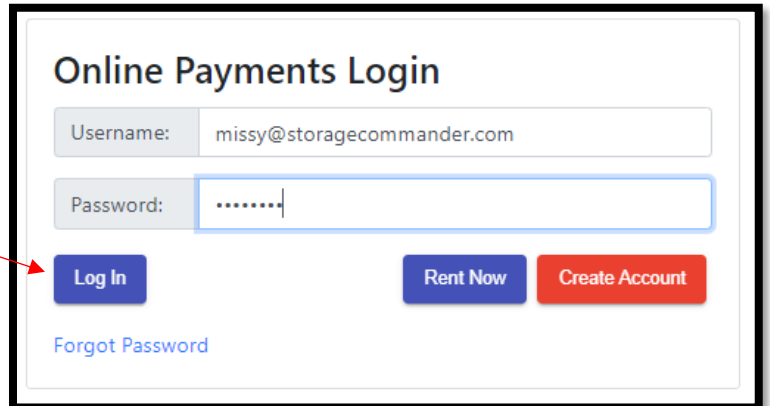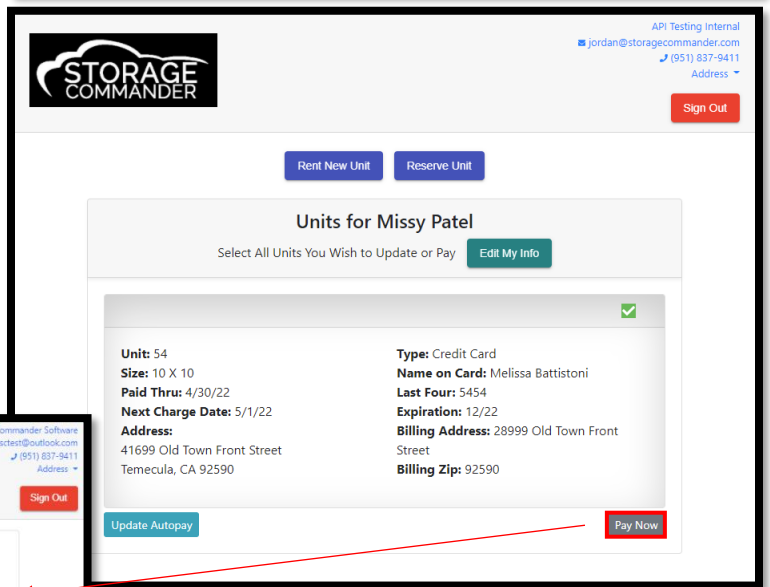
5. Enter username and password and click "Log In".

6. Once logged in, **Check the box** next to the unit(s) that you are wanting to make a payment on and select "**Pay Now**"

7. The "Review Your Changes" window will pop up. This will allow you to view all transaction information.

NOTE: The Select Prior card drop down allows you to charge a card that has already been used and is on file.

8. 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. Then click **"Save Card".**

NOTE: If you need additional help or have questions, please reach out to the facility to help walk you through the process.

Move-In OR Reservation

Tenants can move-in or reserve a unit through the online through the Storage Commander Online Payment Portal 2.0. This process is completed in couple easy steps. Below is the tenant view for updating their credit card online.
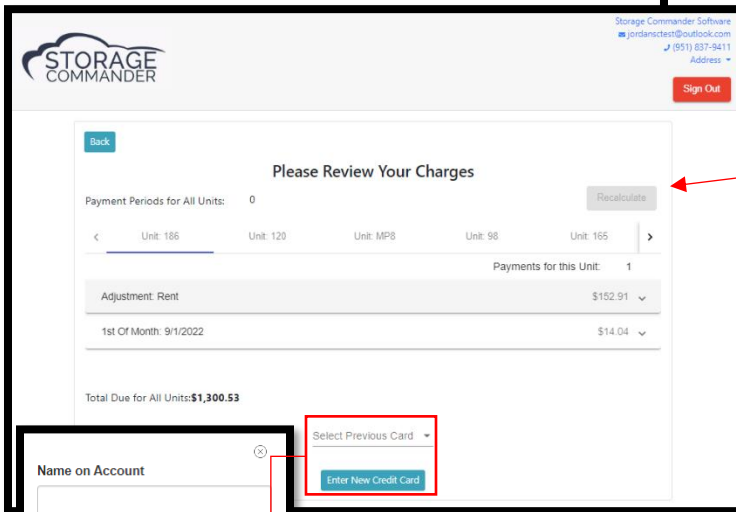
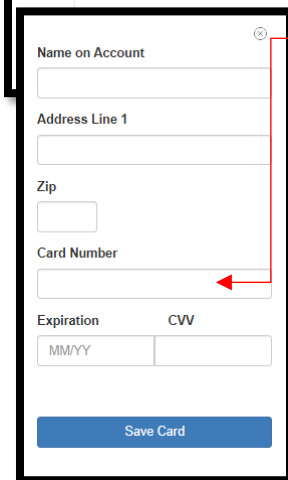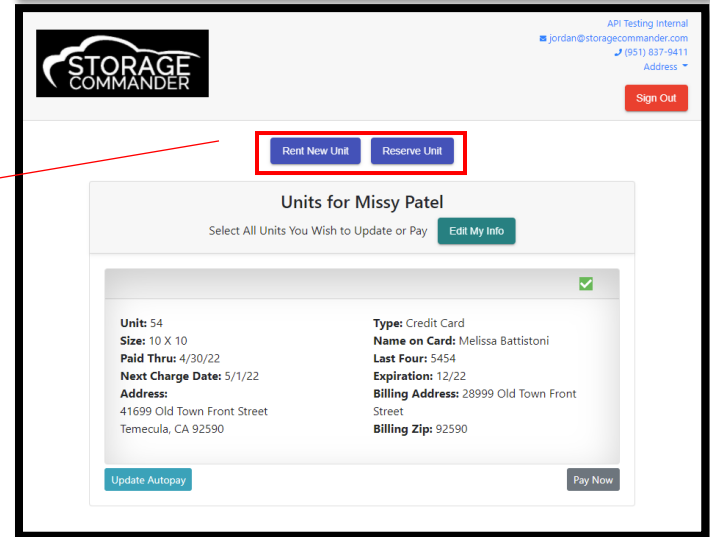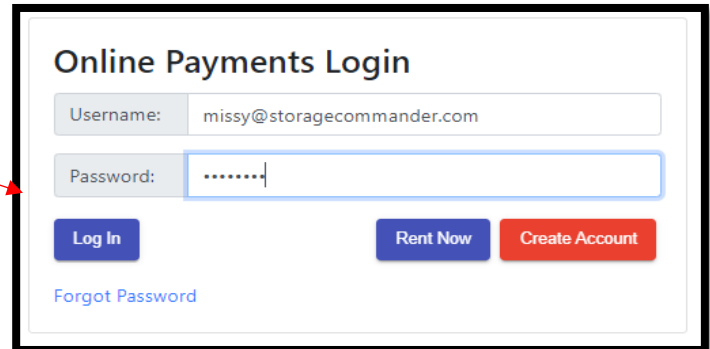1. Enter username and password and click "Log In".

Online Payments Login

Username:	missy@storagecommander.com
Password:	••••••••

Log In   Rent Now   Create Account

Forgot Password

2. Once logged in, Select **Move-in** or **Reserve unit**.

3. Select the unit size that you are wanting to rent and enter your tenant information by following along the pages.
   a. Contact Information
   b. Alternate Contact Information
   c. Take a picture of a photo ID utilizing a phone, tablet, or computer camera.
   d. Select Insurance option (if applicable)
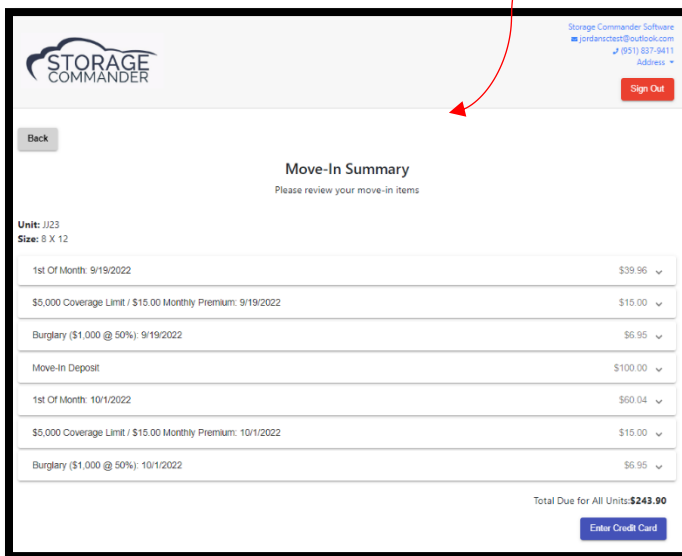   e. Purchase Merchandise (if applicable)

Proceed to **"Go to Payment"** page.

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API Testing Internal
jordan@storagecommander.com
(951) 837-9411
Address ▾

Sign Out

Rent New Unit   Reserve Unit

Units for Missy Patel

Select All Units You Wish to Update or Pay   Edit My Info

☑

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

Type: Credit Card
Name on Card: Melissa Battistoni
Last Four: 5454
Expiration: 12/22
Billing Address: 28999 Old Town Front Street
Billing Zip: 92590

Update Autopay   Pay Now

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Storage Commander Software
jordansctest@outlook.com
(951) 837-9411
Address ▾

Sign Out

Back

Move-In Summary
Please review your move-in items

Unit: JJ23
Size: 8 X 12

1st Of Month: 9/19/2022	$39.96 ▾
$5,000 Coverage Limit / $15.00 Monthly Premium: 9/19/2022	$15.00 ▾
Burglary ($1,000 @ 50%): 9/19/2022	$6.95 ▾
Move-In Deposit	$100.00 ▾
1st Of Month: 10/1/2022	$60.04 ▾
$5,000 Coverage Limit / $15.00 Monthly Premium: 10/1/2022	$15.00 ▾
Burglary ($1,000 @ 50%): 10/1/2022	$6.95 ▾

Total Due for All Units:**$243.90**
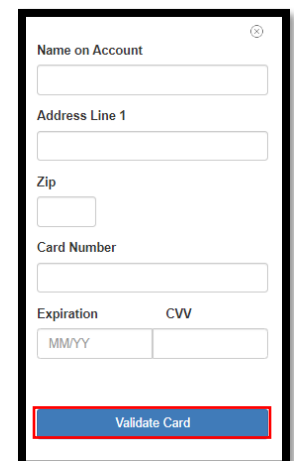
Enter Credit Card

4. View the Move-in Summary for transaction information.

5. Select **Enter Credit Card.**

6. 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. Then click **"Validate Card".**

Name on Account

Address Line 1

Zip

Card Number

Expiration   CVV

MM/YY

Validate Card

NOTE: You will be able to apply the card to Auto-pay by checking the box on the payment page.

4. A new window will open after move-in is completed and the tenant will sign the document via **DocuSign** and press Finish. A copy of the agreement will automatically download to their computer and will save on the tenants Ledger.

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