How-To Guide:

Generate a Notice

OVERVIEW

This guide provides step-by-step actions for Manually Generating a Notice in the Storage Commander including:

- Generating Documents, Notices & Text Messages
- Manually Generate a Notice
- Creating Letters
- Texting
- Sending Text messages using Generate Documents

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.

Generating Documents, Notices & Text Messages

The Generate Documents function allows you to generate documents outside the normal process of automatically generating the documents in the program. late notice, NSF notice, Rate Change notices can be easily generated at any time through this feature, you can also create a custom letter for mass mailing to some or all your active or inactive customers. One of the new features which became available in version 5.10 is texting. The Texting feature allows small text messages (typically under 160 characters) to be broadcasted to all or to specific customers in your facility.

Manually Generate a Notice

To manually generate a notice (such as late notice), *click* on the **Activities** drop down menu item and select **Generate Documents**. This will open the **Generate Notices** window, *select* the customer by locating the customer in the **Contracts** column. Once the customer (or customers) have been selected locate the notice to be generated from the **Notices** column. The selected notice will be automatically populated with the customers current balances and transaction dates. You cannot enter balances or transaction dates yourself. You can preview the notice by *clicking* on the **Generate Notice** button and selecting **View** located to the right of the customer name. To print, or email the notice, *select* the customer by *clicking* on the check box next to the customer name followed by selecting the appropriate **Print**, or **Email** button at the bottom of the screen

Customer selection column.

Notice selection column.

Click on a check box to select a customer.

Select **Include Inactive** to add inactive (moved-out) customers to the list.

Enter a name, unit number, telephone number to initiate a search for the customer.

Click on the Generate Notices button to open the **Generate Documents** print selection screen.

Click to select Autopay customers.

Click to select non-Autopay customers.

Click on a check box to select a customer

Click here to pre-view the document.

Click here to save a copy of the document to the selected customers history.

Select how the document is to be generated
Special NOTE on Texting
See *TEXTING* below

Creating Letters

A letter can be created within Storage Commander through our integrated word processor or by using Microsoft Word to create the letter. If you choose to use Microsoft Word to draft the letter, you will need to import the letter after it is drafted into the integrated word processor in Storage Commander.

For detailed instructions on how to create letters and notices, please refer to the **Configuration Manager** manual under the section "**Notices**"

Selecting Customers

From the **Activities** drop down menu, select **Generate Documents** to open the Generate Notices Window. From this window you can select individual Contracts (Customers) or you can click on the **Select All** button to select all customers in the list. Select the **Letter** category from the **Notices** column and select the appropriate letter from this category. When the letter and customers have been selected click on the **Generate Notices** button to create the letters and move them to the **Generated Documents** window.
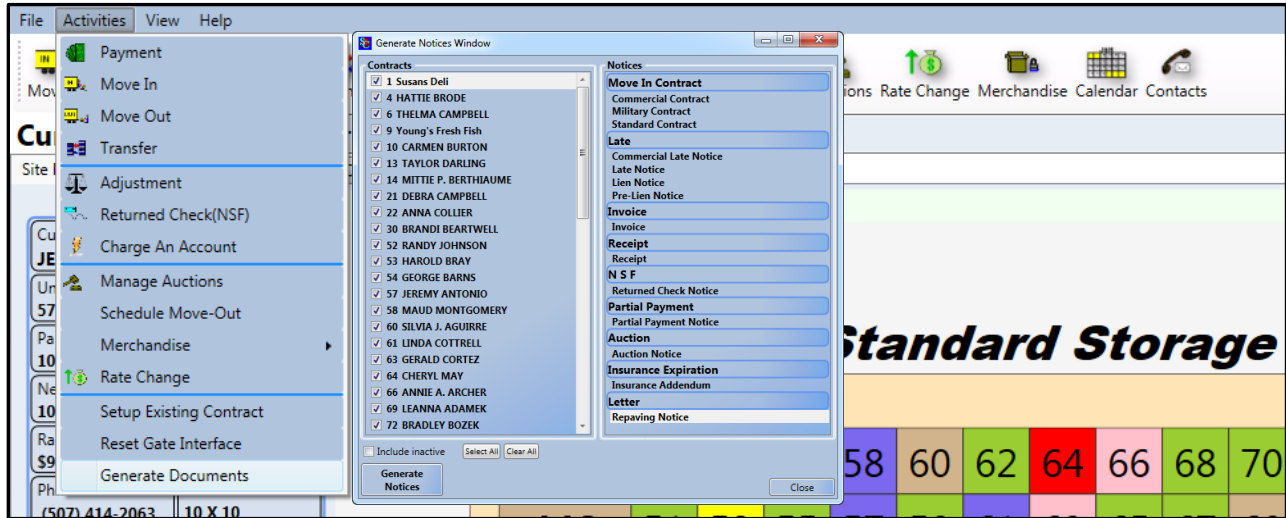
Select the customers to print or email the letter to, or click on the **Select All** button to select all of the customers in the list. You can preview the letter prior to printing or emailing by clicking on the **View** button for a specific customer. If you would like to attach a copy of the letter to customer history, click on the "**Save To History**" button.

NOTE: To view customer history, click on the Ledger/History tab in the customers Contract Details window.

When you are ready to print or email the letter, click on the appropriate button at the bottom of the screen.

Texting

The texting feature allows you to send short (160) character messages to one our all customers in your facility. **Text messages are created** in the *Configuration Manager* and made available in Storage Commander as pre-defined text messages that can be selected from a list.

Text messages will only be sent to customers who have *opted* to receive them. To set a customer up to receive text messages, open the **Contract Details** window for the customer and click on the **Customer tab**. In the telephone section, enter the customers cell phone number and click on the **Can Receive Text** check box.


Creating Text Messages

Open the TEXT MESSAGES screen from the COMPANY SETUP section of the **Configuration Manager**.

Click the "New" button on the toolbar to create a new Text Message. Use the Category and Name fields to help sort and select your messages. Enter the text message. Keep in mind that these messages should be brief and limited to 160 characters or less. Long message will be broken into multiple text message and incur additional cost. Merge codes can be used to automatically insert customer specific data into the text message. Once the message is complete, click the "Save" button to save your changes.

Sending Text messages using Generate Documents

Click on the **Activities** drop down menu and select **Generate Documents** from the menu items. You can select individual customers from the list by clicking on the check box adjacent to the customer name. To select all customers, click on the **Select All** button at the bottom of the customer list.
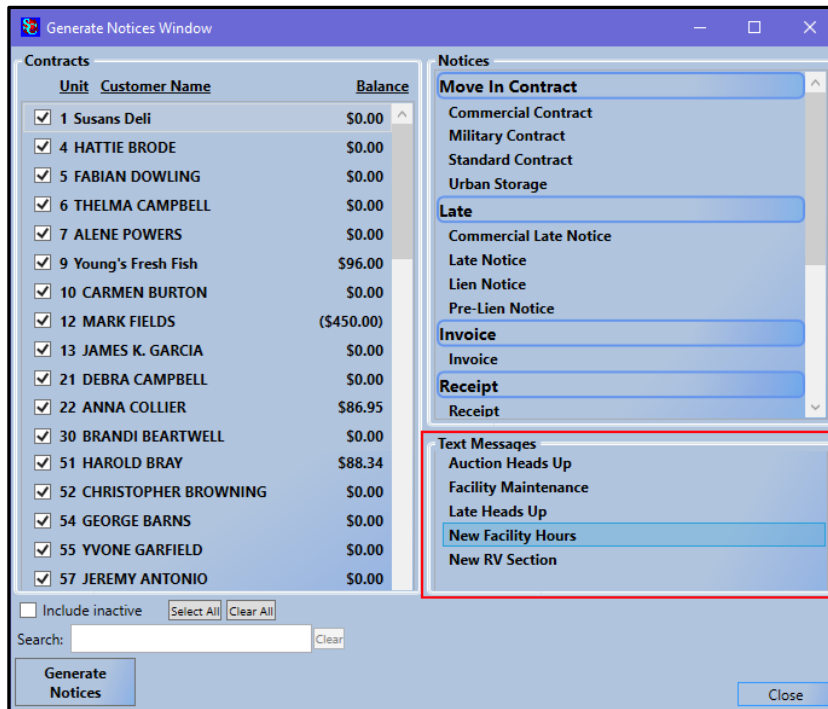
To view and select inactive (moved out) customers, click on the **Include inactive** check box. Inactive customers will be identified by a line drawn through the customer name.

Once the customer(s) have been selected, locate the text message to be sent from the list of available text messages and click on the Generate Notices button to send the text message.

NOTE: Free form (manually entered) text messages are not supported.

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