



How-To Guide:

Setup and Test a Customer Display Terminal

OVERVIEW

This guide provides step-by-step actions for Setting up and Testing a Customer Display Terminal (CDT) in Storage Commander including:

- Downloading drivers from storagecommander.com
- Enabling the hardware and selecting desired settings in preferences.
- Assigning a slide show to the tablet.
- Testing device for signature during move-in.

Note: Not all customers purchase a Customer Display Terminal from Storage Commander. If interested, please contact your account manager for more information.

Downloading Drivers

To utilize the Customer Display Terminal in Storage Commander for signature you must first download the correct drivers. This is accomplished by navigating to storagecommander.com and clicking the “Support” page, and selecting Drivers under the “Topaz Customer Display Terminal” header.

1. Download the Topaz Customer Display Terminal Drivers.

NOTE: Once the drivers are selected, they will run through a download process, proceed forward until complete

STORAGE COMMANDER Technical Support & Solutions

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Knowledge base

Tools

Remote Desktop (1)
ShowMyPC

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Welcome to Storage Commander!

Getting Started (3)
Storage Commander FAQ's
Storage Commander User Manual
Storage Commander Report Book

Storage Commander V5

Check for Updates (15)
Version 5.25.0.0, Released 1/8/2020
Version 5.20.0.10, Released 9/18/2019
Version 5.20.0.8 Released 07/30/19
Version 5.20.0.4, Released 6/27/2019
Version 5.20.0.0, Released 05/06/19
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Documentation (8)
Storage Commander User Manual
Configuration Manager User Manual
Storage Commander Report Book
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Instructional Videos (13)
How to Move a Tenant In
How to Move a Tenant Out
How to Take a Payment
Using Our Built-in CRM
Creating an Automatic Rate Change Bar
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Topaz Customer Display Terminal (2)

Topaz Display User Manual
Drivers

Topaz Customer Display Terminal
Topaz Display User Manual
Drivers

Solution home / Storage Commander V5 / Topaz Customer Display Terminal

Drivers

Modified on: Wed, 21 Nov, 2018 at 8:42 AM

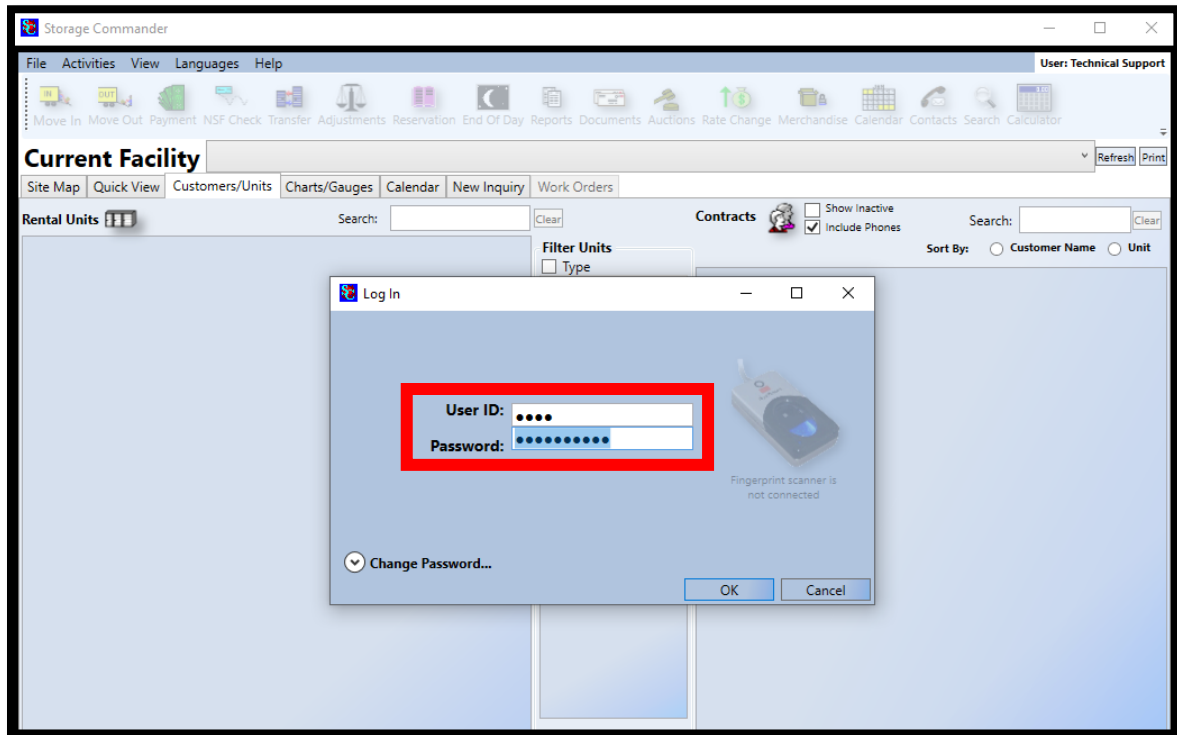
Display Driver (First)
GemView Driver (Second)

Did you find it helpful? Yes - No

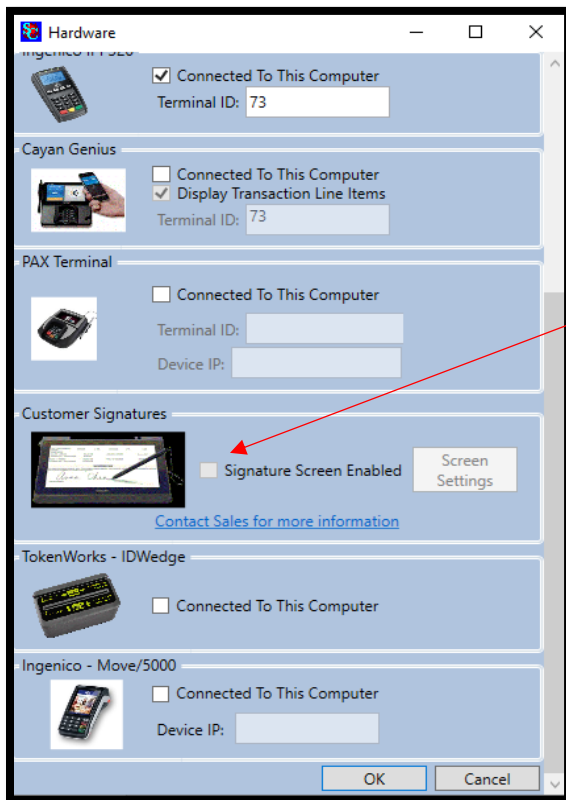
Setting Up Hardware

To utilize the Customer Display Terminal in Storage Commander for signature's you must enable the hardware and select desired settings.

1. Once the drivers are downloaded, Plug the device into your computer and log into Storage Commander.



2. Select **File | Hardware**. Check the box next to "Signature Screen Enabled".



IMPORTANT NOTE: If you can't check this box, please contact our Technical Support team to enable this feature.

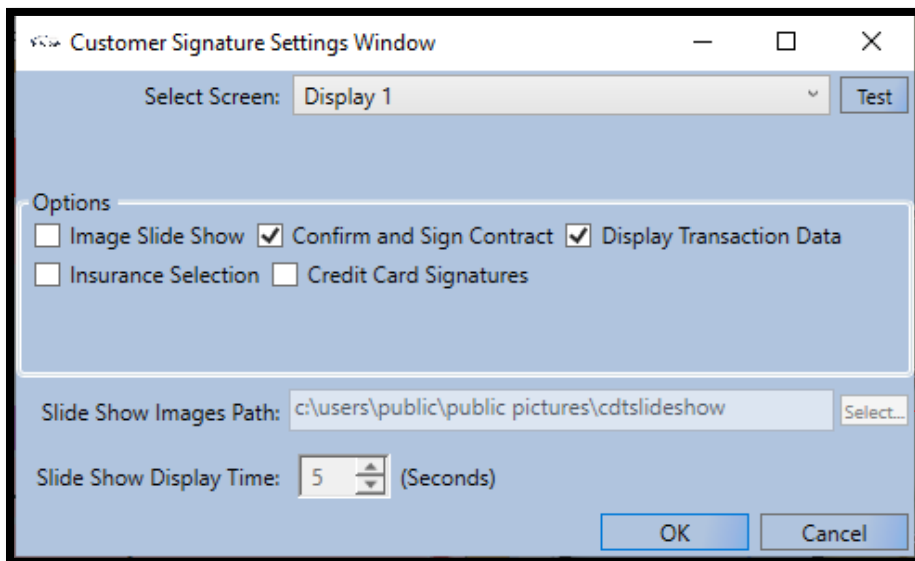
support@storagecommander.com

Technical Support: 951-301-1187

3. Click on Screen Settings to enable features and test the device.

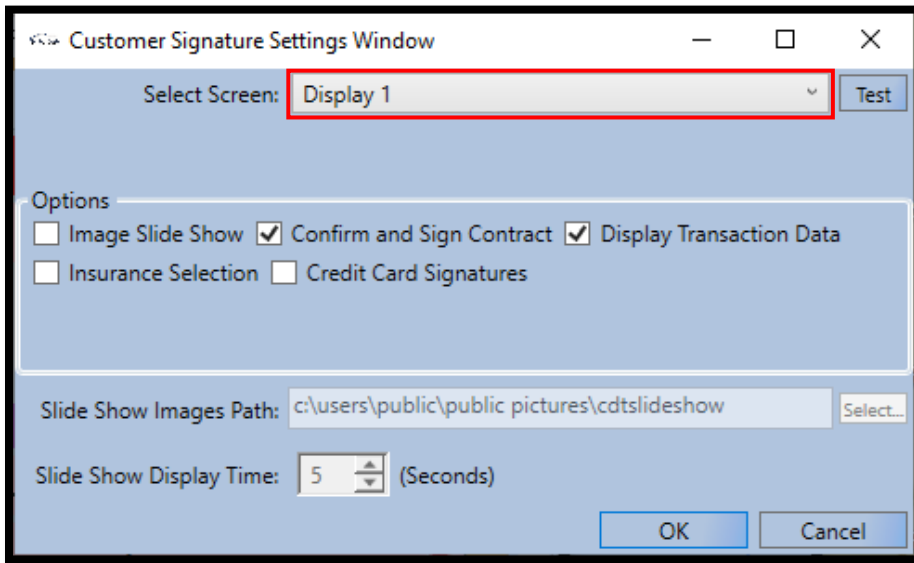


4. Click the box's Confirm and Sign Contract and Display Transaction Data. If your facility offers insurance than select the Insurance Selection option.



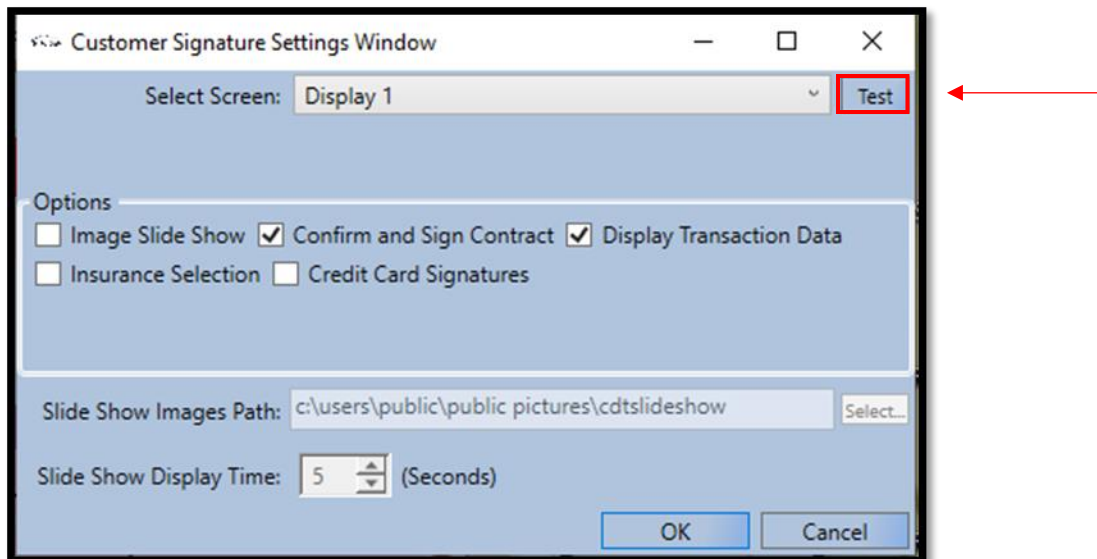
NOTE: If you have images that you would like to display as a slide show, please choose the "Image Path" or folder the images are in.

5. To test that the Customer Display Terminal is working properly with Storage Commander, verify that there are more than one “Display” options in the Select Screen options. If there are more display options than the tablet is ready to test. Select test

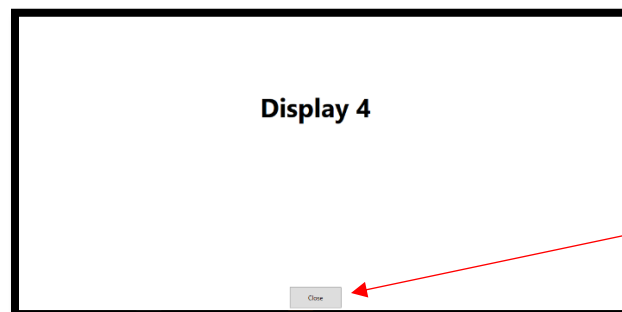


NOTE: If there isn't another display showing, revert to your Display Settings on your computer to make sure your multiple displays are set up “Extend desktop to this display”.

6. Click Test.



7. Check the display on the Customer Display Terminal as it should light up with a Display number.



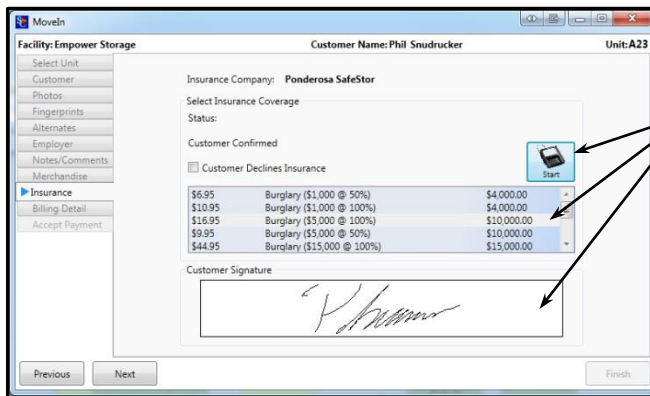
IMPORTANT NOTE: You may get a pop up like the one below. It is not an error; it is a reminder that a slideshow has not been setup for the device. Simply click ok to clear the reminder.



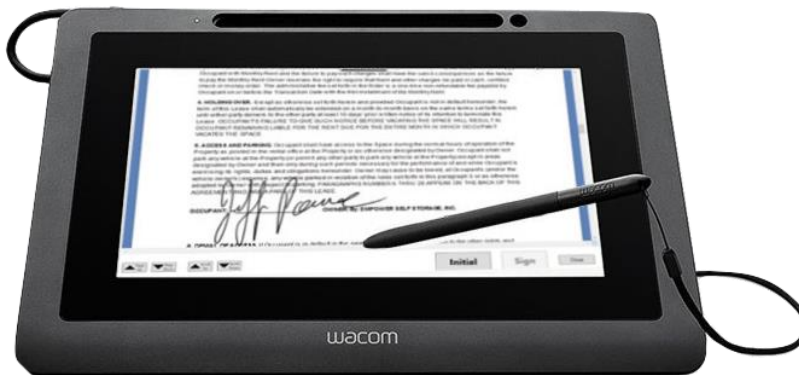
Signing Move-in Contract with CDT

Adding Insurance to a Customer Account

1. Clicking on the Insurance tab opens the insurance policy selection screen. If you have purchased the **Customer Display Terminal**, click on the **Customer Signature** icon to allow the customer to select the insurance policy and digitally sign the insurance contract.



Click on the Customer Access Terminal icon to allow customer to select insurance policy and to digitally sign insurance contract.



Customer  Terminal

Note: Displaying available insurance policies and digitally signing the insurance contract, is only available through the optional Customer Display Terminal.

If you are not using the Customer Display Terminal or if you are using another insurance provider, click on the insurance policy requested by the customer, to assign the policy to the move-in.

Click on the **Next** button to proceed with the move-in.

Move-In Billing Screen

- The move-in billing screen is where all the elements of the move-in come together. From this screen you will assign a **Billing Plan**, **Gate Access code** and **Lease Number** (if you use lease numbers) to the new customer, as well as add **Fees**, **Discounts**, **Services**, and **Deposits** to the new account. Additionally, you can record Contact information to the account for demographic reference.

Enter a new rate when using the Revert Rate feature

Select Revert Date to temporally change the rate on the unit for a specific period of time

Displays current rate of unit

Select Billing Plan to be assigned to customer account

Assign a Lease Number to customer account

Adjust the date of the move-in

Increase / Decrease the number of rental payments

Removes the 1st month prorated rent (only available on fixed billing plans)

Select to assign gate code, gate time zone & keypad zone

Select to manually send Deny Access command to gate

Click to Preview the lease

The form includes fields for Rate (\$90.00), Revert Date (9/21/2019), Move-In Date (8/21/2019), Size (10 X 10), Nbr of Payments (1), Projected Paid Through (8/31/2019), Billing Plan (1st Of Month), Lease Nbr, Lease Exp (8/21/2020), Access Code, Time Zone, Keypad Zone, and Deny Access. A Preview Lease button is also present.

Facility: Empower Storage Customer Name: DAVE GREENBURG Unit: 70

Calculate

Contact Type: Walkin

Contact Category: Local Resident

Contact Source: Drive By

Reason For Renting: Location

Rate: \$90.00 Revert Date: 7/7/2017 Move-In: 6/7/2017

Number Of Payments: 1

Projected Paid Through: 7/6/2017

Billing Plan: Storage & RV

Lease Nbr: Access Code:

Lease Exp: 6/7/2018 Time Zone:

Keypad Zone: Deny Access

Preview Lease

Applied To Contract

Senior Discount: 10.00 % (Delete)

Admin: \$10.00 (Delete)

Current Transactions

Item	Amount	Waive Item
Storage & RV: 6/7/2017	\$90.00	
Burglary (\$1,000 @ 100%): 6/7/2017	\$10.00	
Admin	\$10.00	
Waived: Admin	(\$10.00)	<input checked="" type="checkbox"/>
Senior Discount: 6/7/2017	(\$9.00)	
Disk Lock: Qty 1	\$7.00	
Sales Tax	\$0.56	

Summary - All Contracts

Item	Amount	Waive Item
Net Due	\$90.00	
Discounts	(\$9.00)	
Fees Due	\$0.00	
Deposit Due	\$0.00	
Merchandise	\$7.00	
Insurance	\$10.95	
Taxes Due	\$0.56	
Total Due	\$99.51	

Previous Next Finish

Fees, Discounts, Services or Deposits that have been added to the account will be added to the **Applied To Contract** box. To remove an item from this list, click on the **Delete** button next to the item to be removed.

Add additional Fees, Discounts, Services or Deposits to the account

After clicking on the Calculate button, all items relating to this move-in will be listed under **Current Transactions**

If a Fee or Discount has been configured to allow it to be Waved, a Wave Item selection box will appear to the right of the item. Selecting this will create an offsetting credit to the account

The Summary section lists all individual transaction totals and shows the total due

Contact Type: How did the customer find your facility

Contact Category: Used to profile customer. Military, Local Resident, Senior....

Contact Source: What type of advertising directed the customer to your facility

Reason for Renting: What sold the customer on your facility

The screenshot shows the full Move-In Billing interface, including the left-hand navigation menu with options like Select Unit, Customer, Alternate Contacts, Photos, Fingerprints, Authorized Access, Employer, Notes/Comments, Merchandise, Insurance, Billing Detail, and Accept Payment. The main area contains the form for entering move-in details and a table of current transactions and summary totals.

-
2. The customer will be viewing the charges directly from the Customer Display Terminal. Just like the image below. If you need to recalculate, the customer will see the change on the tablet.

Customer: DEBRA CAMPBELL		Unit:	Rate: \$0.00	
Current Transactions				
1st Of Month: 1/17/2020				\$34.50
Admin				\$10.00
				Total: \$44.50
Past Due				
				Total: \$0.00
Summary				
Rent Due:	\$34.50	Merchandise:	\$0.00	
Discounts:	\$0.00	Insurance	\$0.00	
Fees Due:	\$10.00	Taxes Due:	\$0.00	
Deposit Due:	\$0.00	Total:	\$44.50	

3. Accept payment from the payment screen. The customer will be viewing an amount during this time.

Move In: DEBRA CAMPBELL

Facility: Storage Commander Software, LLC Customer Name: DEBRA CAMPBELL Unit: 24

Select Unit
Customer
Alternate Contacts
Photos
Notes/Comments
Merchandise
Insurance
Billing Details
▶ Accept Payment

☒ Cash
☐ Check
☐ Credit Card
☐ Debit Card

Money Received: \$44.50

Payment Summary	Cash:	\$44.50
	Check:	\$0.00
	Credit:	\$0.00
	Debit:	\$0.00
Total Amount Due: \$44.50	Total Payment:	\$44.50
	Balance:	\$0.00

Previous Next **Finish**

Your View.

Customer View on Tablet.

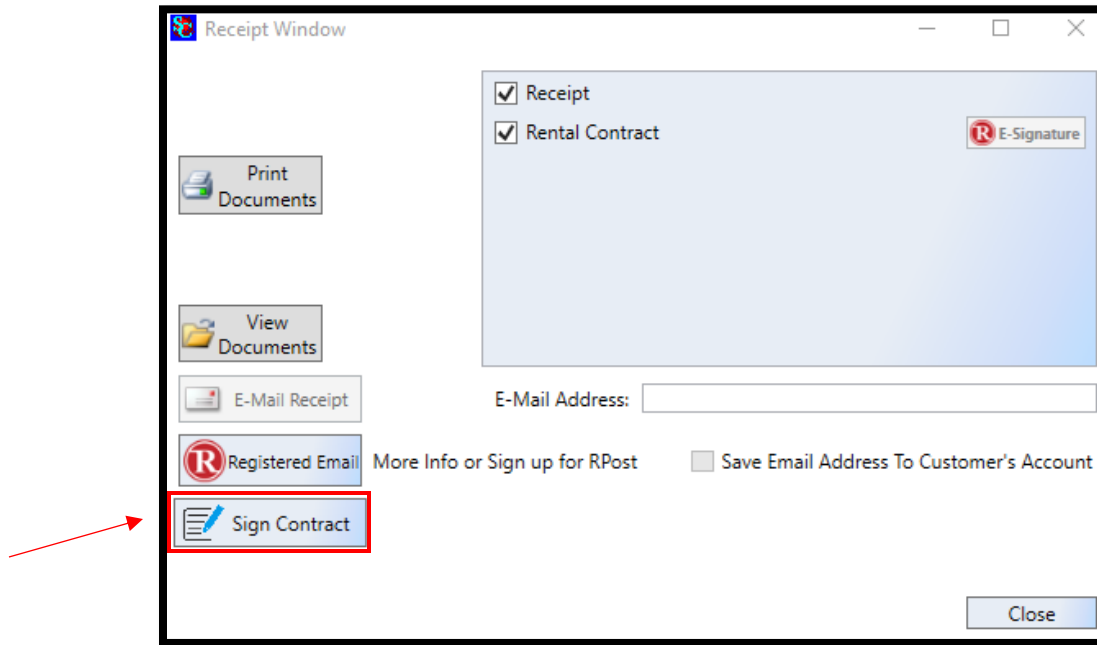
Customer: DEBRA CAMPBELL Unit:

Rate: \$0.00

Amount Due: \$44.50

Payment Method: Cash

4. On the receipt window, click the Sign Contact button. This will prompt the customer to view and sign the contract from the tablet.



- Customer can view the contract and sign with either an initial or signature. This is based on the merge fields that are inputted into your contract.

NOTE: Please contact our technical support team for additional help and questions on this process.

Storage Commander Software, LLC			
28999 Old Town Front Street Temecula, CA 92590 (951) 672-6257			
sales@storagecommander.com			
Contract Number			
Standard			
RENTAL AGREEMENT			
1. LEASE INFORMATION:			
A. Date of Lease: <u>1/17/2020</u>	B. Storage Space No: <u>24</u>	C. Approx. Unit Size: <u>5 X 10</u>	
D. Access Code:	E. Administration Fee: <u>\$15</u>	F. Rental Rate Per Month: <u>\$70.00</u>	
G. Occupant's Name(s): <u>DEBRA CAMPBELL</u>	Phone: <u>(401) 628-2285</u>		
Address: <u>{address1}</u> 3441 WINDING WAY	City: <u>PROVIDENCE</u>	State: <u>RI</u>	Zip: <u>92591</u>
Drivers Lic #:	E-Mail address:	Cellular #:	
Employer: <u>{employer}</u>	Phone:		
NO RENT REFUNDS			
PLEASE PROVIDE THE NAME AND ADDRESS OF ANOTHER PERSON IN ADDITION TO YOURSELF NOT LIVING WITH YOU TO WHOM ANY PRELIMINARY LIEN NOTICE AND SUBSEQUENT NOTICES MAY BE SENT.			
Name: _____	Phone: _____		

6. Once the customer is ready to sign the contract using the tablet they will select “Sign” and a signature window will open. They can sign on the tablet with the pen or use the mouse attached to your computer.

Storage Commander Software, LLC
28999 Old Town Front Street Temecula, CA 92590 (951) 672-6257
sales@storagecommander.com

Contract Number
Standard

1. LEASE INFORMATION:
A. Date of Lease: 1/17/2020
D. Access Code:
G. Occupant's Name(s): DEBRA CAMPBELL
Address: {address1} 3441 WINDING WAY
Drivers Lic #:
Employer: {employer}

Signature Window
B. S
E. A
70.00
91
Save Clear Close

NO RENT REFUNDS
PLEASE PROVIDE THE NAME AND ADDRESS OF ANOTHER PERSON IN ADDITION TO YOURSELF NOT LIVING WITH YOU TO WHOM ANY PRELIMINARY LIEN NOTICE AND SUBSEQUENT NOTICES MAY BE SENT.
Name: _____ Phone: _____

Sign Close

7. This will direct you back to the receipt window and will show the signature confirmation. Select OK.

Receipt Window

☒ Receipt
☒ Rental Contract

Print Documents
View Documents
E-Mail Receipt
Registered Email
Cancel Signature

Signature Confirmed
My Balthi
OK

Close

8. From here, click close to finish the transaction or click Cancel Signature to re-do signature on tablet.

Receipt Window

☒ Receipt
☒ Rental Contract

Print Documents
View Documents
E-Mail Receipt
Registered Email
Cancel Signature

E-Mail Address: _____
More Info or Sign up for RPost ☐ Save Email Address To Customer's Account

Close

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