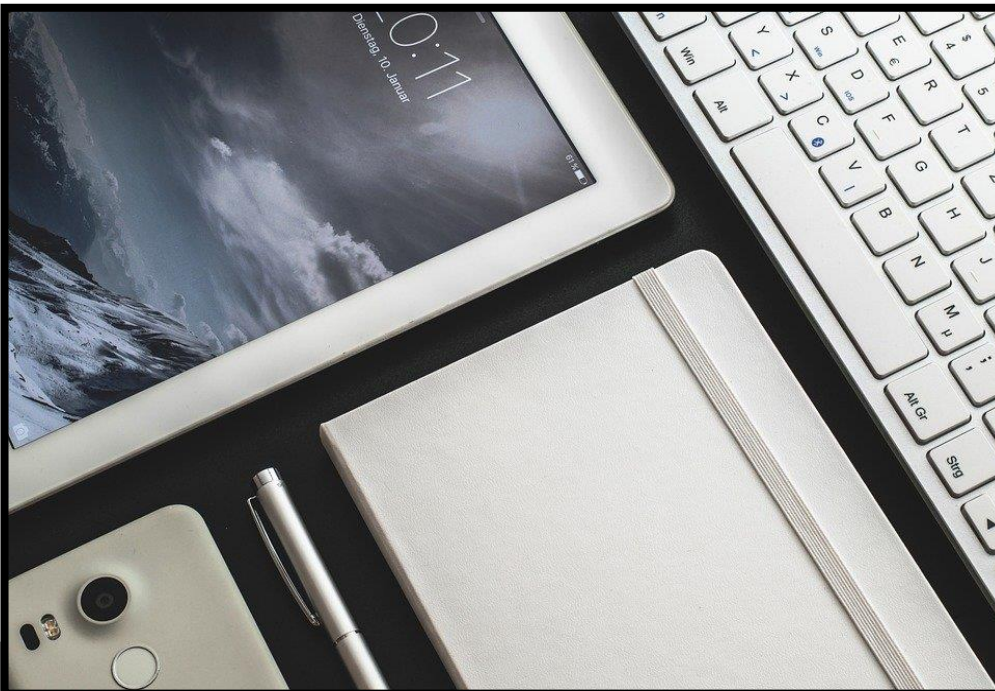


STORAGE COMMANDER

ONLINE

Operations Manual



Welcome to Storage Commander!

Storage Commander Software is the most powerful and easy-to-use Self-Storage management software available. Our software was developed exclusively for the Self-Storage industry, Storage Commander Online was designed using a browser, and incorporates many features not found in any other management program. The compatible browsers for Storage Commander Online are as follows: **Google Chrome, Mozilla Firefox, Safari, and Microsoft Edge**. The language's supported in Storage Commander Online is based on your preferred language in your browser settings.

This manual will help you to quickly get started with Storage Commander Online. We strongly recommend that you start with Section 1, *Facility Operations Module*. This section will give you an overview of all the individual functions, screens and parameters that affect the operations of Storage Commander.

Proceeding to following sections, will allow you to familiarize yourself with basic operations such as: move-in, move-out, adjustments, transfers, payments, as well as other standard operations Self-Storage managers do on a day-to-day basis.

It is important to understand that even though these operations may be considered standard to all Self-Storage facilities, not all stores operate the same. For instance, some stores may charge rent on the first of the month, while others charge rent each month on the calendar day of the move-in (Anniversary date). Some stores prorate unused rent at move-out and some will only allow prorated refunds if the customer gave notice within a predetermined time frame. The list of operational differences used throughout the Self-Storage industry is extensive and, while Storage Commander Online can be configured to meet the operational requirements of your store, we strongly recommend that you take the time to review Section 3, *Installation & Setup*, to verify that Storage Commander Online is configured correctly for your facility.

We're available to help you with any questions that you might have with using Storage Commander Online. 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**.

If you have any ideas on how to improve Storage Commander, please call us. We are always happy to discuss new features with our customers.

Thank you,

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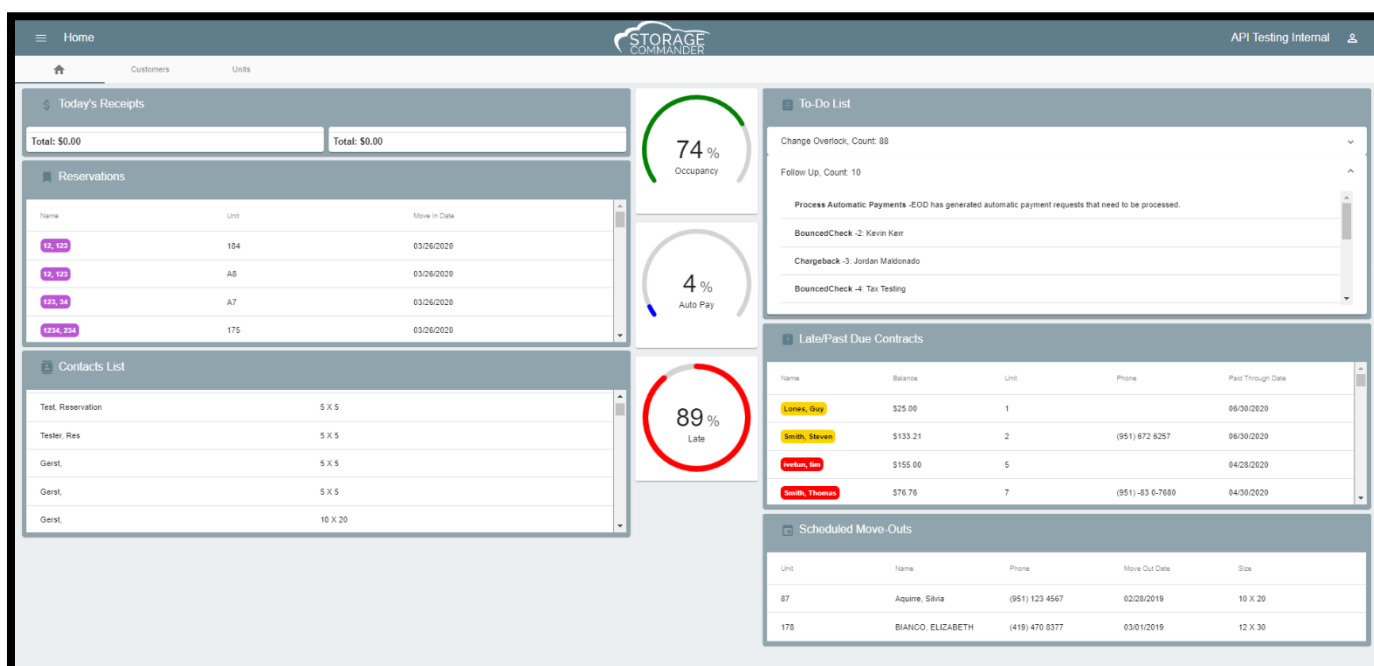
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Facility Operations Module

Storage Commander Online facility management system is completely browser-based and device independent, Storage Commander Online offers a new way for owners and operators to manage their Self-Storage business by seamlessly accessing their software from any browser-enabled device. Comprised of two separate modules, the Storage Commander Online Facility module, used by the on-site facility management team, and the Storage Commander Configurations module, used by corporate and district management to configure and or modify the operational configuration of the Storage Commander Online facility module. To learn more about using the Storage Commander Configuration Manager module, please refer to the Storage Commander Configuration Manager manual.

Home Screen

The **Home Screen** of Storage Commander Online provides a view of critical customer accounts, unit action items, a to-do list, charts that show vital data and daily receipts.



The **Reservation** section of **Home Screen** shows the units that are currently reserved at your facility, their scheduled move in date, the unit number assigned to them.

Reservations		
Battistoni, Melissa	13	08/06/2020
BURTON, DORIS	179	01/27/2019

The **Contacts List** displays a list of all open prospects, who have contacted the facility and expressed an interest in renting a space, equivalent to a waiting list.

Contacts List			
Name	Phone	Size	Follow Up
test,		5 X 10	
Test, Reservation		5 X 5	
Tester, Res		5 X 5	
Gerst,		5 X 5	

The **To-Do List** shows dirty units and units that need an over lock add or removed.

To-Do List	
Change Overlock, Count: 88	
Follow Up, Count: 10	

The **Late or Past Due Contract** section shows the delinquent units at your facility. **screen.**

Late/Past Due Contracts				
Name	Balance	Unit	Phone	Paid Through Date
Lones, Guy	\$25.00	1		06/30/2020
Smith, Steven	\$133.21	2	(951) 672 6257	06/30/2020

Color Ledger

- **Pink – Auction Status.**
- **Red – Overlocked: Customers who have entered a late status that requires their storage unit to be over locked.**
- **Brown – Past Due (Not in a Late Status).**
- **Yellow – Deny Gate Access: Customers gate codes will not open the gate while in this late step**

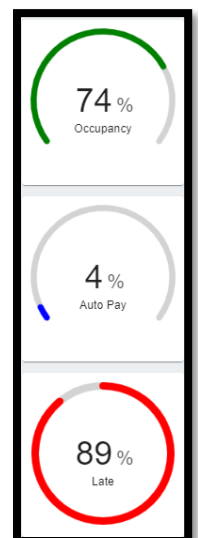
The **Scheduled Move-Outs** screen shows all the Scheduled Move-Outs at your facility.

Scheduled Move-Outs				
Unit	Name	Phone	Move Out Date	Size
87	Aquirre, Silvia	(951) 123 4567	02/28/2019	10 X 20
178	BIANCO, ELIZABETH	(419) 470 8377	03/01/2019	12 X 30

Occupancy Percentage is calculated by dividing the total number of units that are occupied, by the total number of units available.

Auto-Pay Percentage is calculated by dividing the number of total tenants enrolled in Automatic Payment by the total number of tenants.

Percent Late is calculated by dividing the number of total tenants that are in a late step by the total number of tenants.



Switching Facilities

Click on the **Facility Name** located at the top right of the Storage Commander Online main screen to select the facility you are viewing.

If you have multiple facilities, click on the **Select a Facility** drop down to toggle between databases.

Current Location: **API Testing Internal**

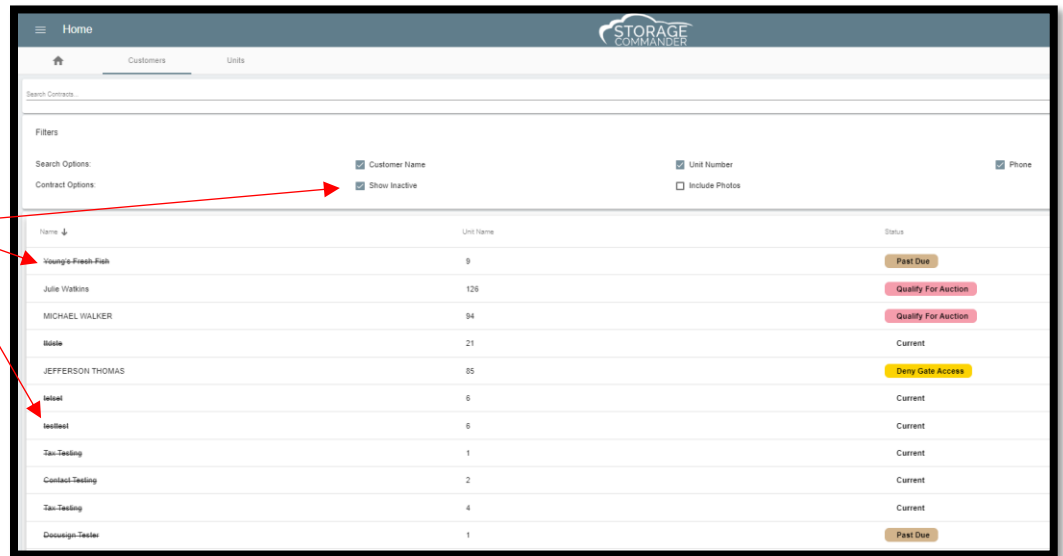
Select a Facility: ▼

Cancel Change Facility

Customers Screen

The **Customers screen** allows access to account information for both **Active customers** and **Inactive (moved out)** customers. In addition, you can also process payments, charge a fee, make account adjustments, reverse payments, transfer to another unit, or move the customer out from this screen. Managing a customer account through this screen is accomplished using the Right or Left mouse buttons. A detailed description of the functions of the Right & Left mouse buttons is described below:

Inactive (Moved Out)
Customers



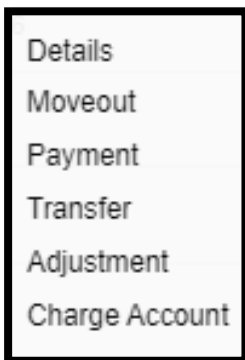
Name	Unit Name	Status
Youngs-Fresh Fish	9	Past Due
Julie Watkins	128	Qualify For Auction
MICHAEL WALKER	94	Qualify For Auction
Biale	21	Current
JEFFERSON THOMAS	85	Deny Gate Access
Isabel	6	Current
Isabel	6	Current
Tao-Taoing	1	Current
Contract-Taoing	2	Current
Tao-Taoing	4	Current
Disowning-Taoing	1	Past Due

Selecting Inactive (Moved Out) Customers

To select customer who have moved out of the facility, click on the **Show Inactive** selection box to add customers who have been moved out to be added to the list. These customers will be identified by a line down through their name.

Managing a customer account using the Right Mouse Button

Clicking on a customer name with the **right** mouse button opens a window containing the most common customer management functions. From here you can:



- ❖ Go to the customer contract details
- ❖ Move a customer out of the unit
- ❖ Process a Payment
- ❖ Transfer the customer to another unit
- ❖ Make an Adjustment
- ❖ Charge a fee to the customer

Changing a customer account by double clicking using the Left Mouse Button

This will open the **Customer Detail window**, allowing you to modify the customers contact information, enter notes, alerts or comments to the account, open the customer ledger to view transaction history, or open the Activities window where you can; Add additional units to the customer, vacate a unit, Transfer to another unit, Make an Adjustment, reserve a unit, or make a Payment.

Click on a tab to open a data entry screen associated with the selected item.

Contract Details

Facility: API Testing Internal Customer Name: Julie Watkins Unit: 126

Contract

Unit Info

Vehicle

Customer

Alternate Contacts

Photos

Authorized Access

Employer

Notes Comments

Unit Inventory

Ledger History

Activities

Contract Details

Balance: \$2,091.70

Next Charge: Jul 24, 2020

Delinquency Status: Qualify For Auction

Lease Information

Lease Number: 23433

Lease Expiration: 12/31/9999

Apply

Update...

Auto Payment: None

Scheduled Move Out

Paid Through: Mar 23, 2019

Days Late: 505

Auction Date:

Deposit Balance: \$0.00

Deny Access: ☒

Recurring Items

Burglary (\$10,000 @ 100%) Start: Sep 21, 2018 End: \$31.95

Rate Changes

Send Gate Info

The **Activities** tab allows additional transactions to be processed to the selected customer. From this screen you can quickly access functions that are commonly used on a day-to-day basis.

Contract Details

Facility: API Testing Internal Customer Name: Julie Watkins Unit: 126

Contract

Unit Info

Vehicle

Customer

Alternate Contacts

Photos

Authorized Access

Employer

Notes Comments

Unit Inventory

Ledger History

Activities

Activities

Add A Unit

Vacate This Unit

Transfer To Another Unit

Make An Adjustment

Reserve Another Unit

Make A Payment

Charge Account

Previous

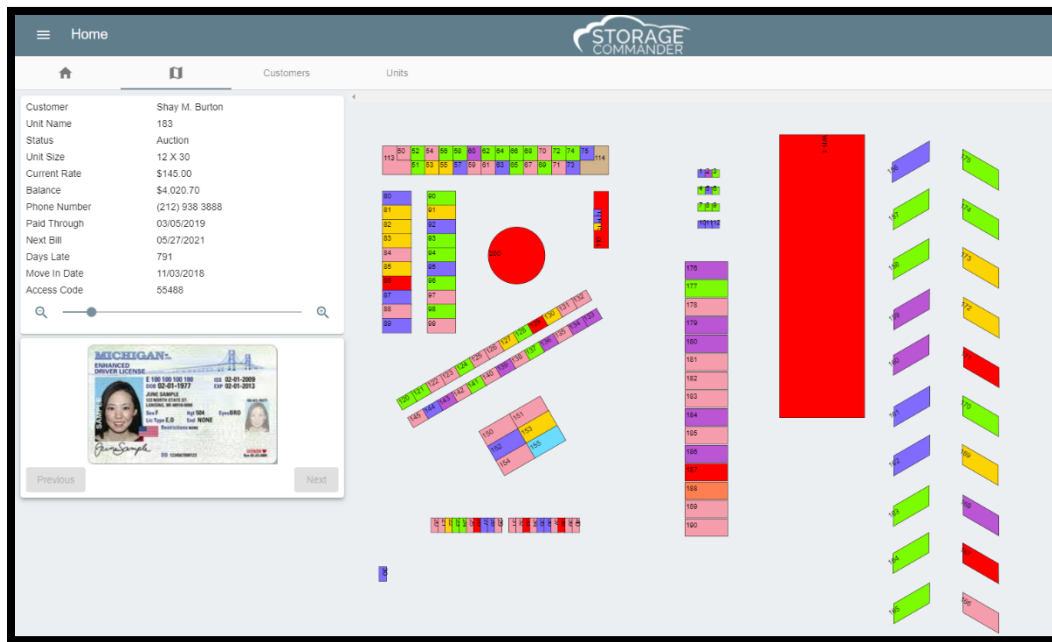
Next

Submit

Click on the button associated with the desired function.

Site Map

The Site Map is a feature rich and extremely powerful tool of the Storage Commander Program. Read through this section to gain important information on how to use this feature. Click the **Site Map** Tab to access the facility map.



- ❖ Notice that the Colors on the map correspond to the Colors on the Legend Bar located at the bottom of the Storage Commander screen. The features associated with the legend bar are explained later in this manual.
- ❖ The Zoom Bar at left of the map can be moved left and right to Zoom in and out of the map. The Scroll Bar on top of the screen gives you the option of scrolling around on the screen.
- ❖ If you click a unit, it will display the following on the left side of the screen:

- Customer Name
- Unit Number
- Paid Thru Date
- Next Bill Date
- Unit Rental Rate
- Phone Number
- Move-In Date
- Status
- Days Late
- Last Rate Change
- Unit Balance
- Unit Size
- Access Code
- Multiple ID Pictures



- ❖ Double clicking a **Rented** unit on the map will launch the payment screen.
- ❖ Double clicking an **Available** unit on the map launches the move-in screen.
- ❖ Right clicking on a **Rented** unit will open a menu box allowing you to open the customers details screen or process a payment on the unit etc.

Units Screen

The **Units Screen** shows **Rental Units & Contracts** (Customers). From the **Units Screen** you can move customers into available units and make payments on existing customers. The Rental Units column can be sorted by **Type**, **Condition**, **Size**, **Status** or **Attributes**. To filter the criteria, select how you would like the list sorted by clicking on the appropriate filter selection in the Filter Units selection panel.

The screenshot shows the 'Units' tab in the Storage Commander interface. At the top, there's a search bar labeled 'Search Unit Number...'. Below it is a 'Filters' section with a dropdown arrow. The main area displays a list of five units, each with details like Unit number, Status (all 'Rented'), Floor, Type, Size, Condition, and Rate. Red arrows point from the 'Rented' status labels to the 'Status' filter in the filter panel below.

Unit	Status	Floor	Type	Size	Condition	Rate
Unit: 1	Rented		Cold Storage	5 X 5	Ready	\$15.00
Unit: 2	Rented		Cell Tower	5 X 10	Ready	\$123.21
Unit: 3	Rented	2	Campground Space	5 X 5	Ready	\$15.00
Unit: 4	Rented		Cold Storage	5 X 5	Ready	\$15.00
Unit: 5	Rented		Cold Storage	5 X 5	Ready	\$15.00

Unit **Type**, **Size & Attributes** are created in the Storage Commander Configuration Manager.

To display a specific unit, enter the unit number here.

This close-up shows the 'Filters' panel. It includes a search bar at the top. Below it, there are four dropdown menus: 'Unit Type', 'Unit Condition', 'Unit Size', and 'Unit Status'. At the bottom, there is a 'Unit Attributes' dropdown and a 'Clear' button.

Control how rental spaces are displayed by selecting specific filter parameters in the Filter Units selection panel.

Making a Payment

Payments can be processed in several different ways depending on user preference. Regardless of the payment method used; the actual payment process remains the same.

The Storage Commander payment function supports **Cash, Check, Credit Card & Debit Card payments**. Payments can be posted to an account to pay for past due balances, as a pre-pay credit or as a partial payment. Billing plans can be configured to allow **rent charges** by the **Week, Month, Quarterly, Simi-Annual or Annual**. Refer to the Configuration manual for information on how to setup a billing plan.

There are **Multiple** ways to process a payment on a customer account. You can select from any of the methods that you feel most comfortable with. All methods work the same way and will deliver the same result.

We will start by showing you the location and how to start the payment process for each of the payment methods.

Payment Methods

Using the Menu/ Activities

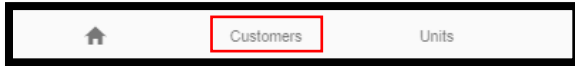
Click on the **Menu/ Activities** item located at the top of the Storage Commander Online main screen and select **Payment** from the list.

A customer can be located by searching through the customer list, or by placing a **check mark** in the **Customer Name**, **Unit Number**, or **Phone** and entering the associated search information in the **Search Contracts** field.

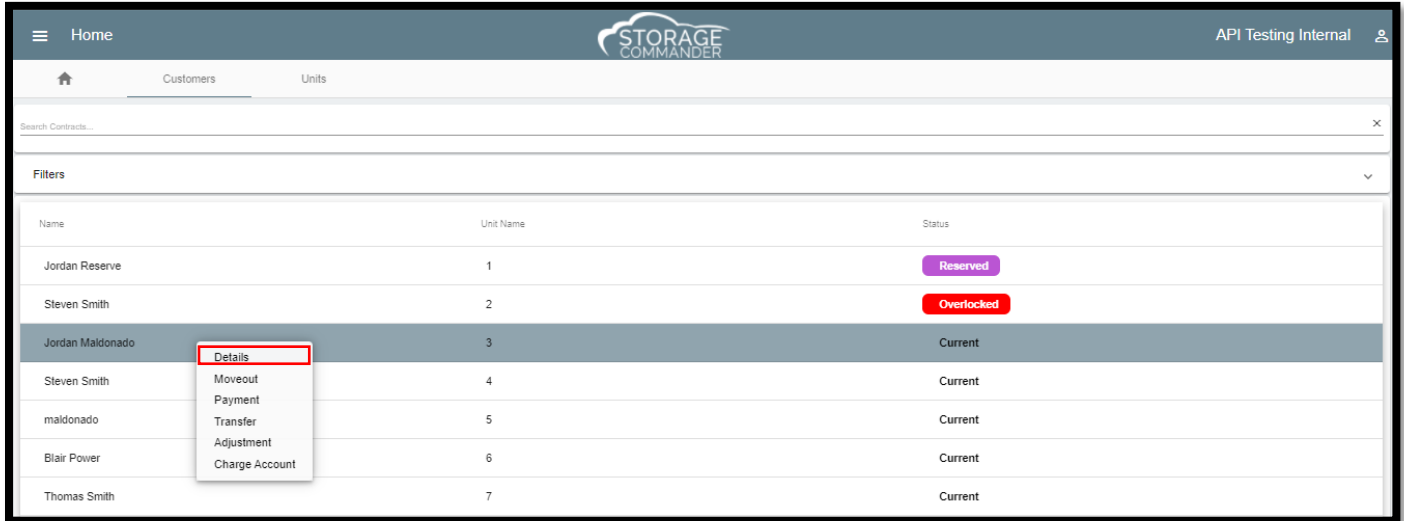
The screenshot displays the Storage Commander web application interface. On the left, a sidebar menu is visible with the 'Activities' section highlighted. The main content area shows the 'Payment' screen, which includes a search bar and a table of customer contracts. The table has columns for Name, Unit Name, Phone, Status, and Moved-In date. The 'Status' column contains values like 'Overlocked' and 'Current'.

Name	Unit Name	Phone	Status	Moved-In
Steven Smith	2	(951) 672 6257	Overlocked	06/24/2020
Jordan Maldonado	3		Current	07/24/2020
Steven Smith	4	(951) 672 6257	Current	07/02/2020
maldonado	5		Current	09/17/2020
Blair Power	6		Current	09/30/2020
Thomas Smith	7	(951) 43 0-7880	Current	04/26/2020
Kevin Kerr	9		Current	03/13/2020
Missy TEST	10		Current	04/29/2020
Jordan Tester	11		Overlocked	04/27/2020
test testet	13		Current	09/03/2020
Tester Maldonado	14		Current	09/17/2020

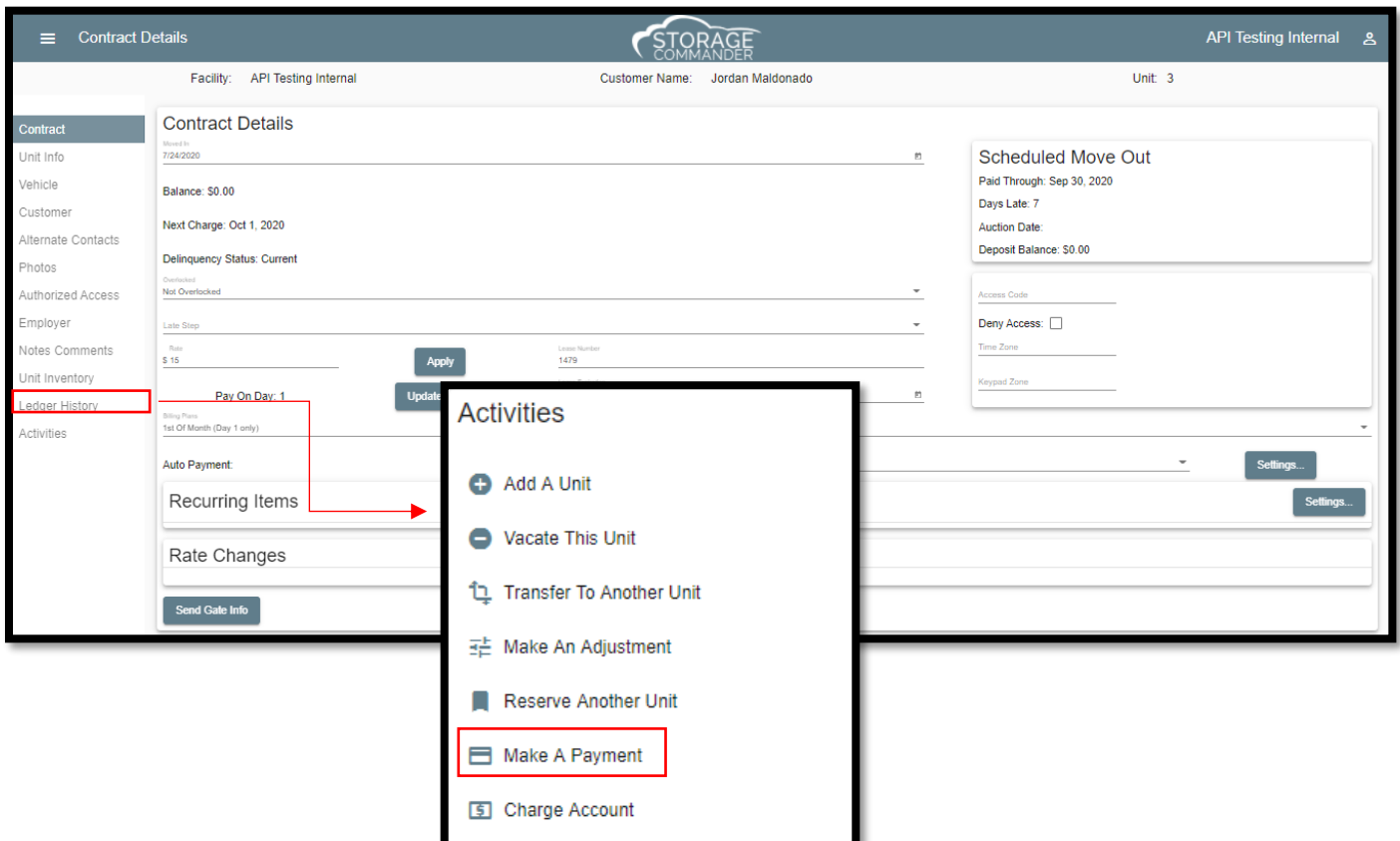
Using the Customers Screen



The Customers screen lists all Units and Contracts (Customers). A payment can be initiated by **right** clicking on an occupied unit and selecting **Payment**.

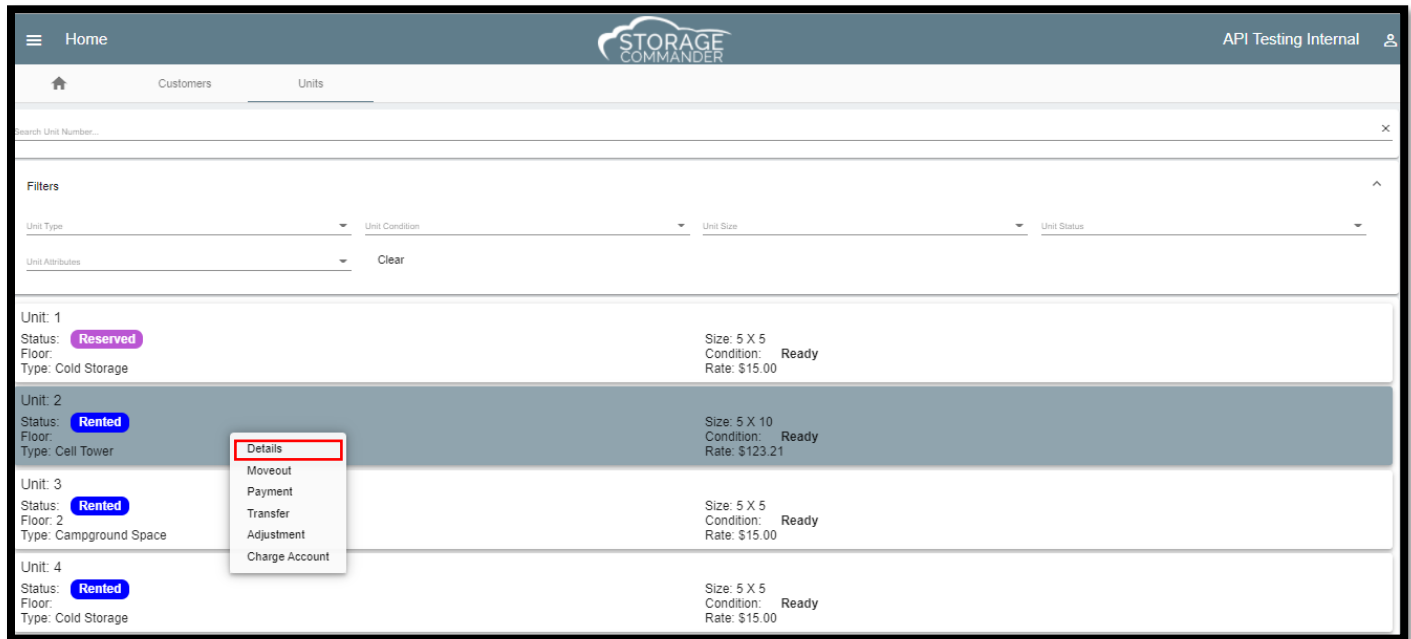


The other option would be by **double** clicking on the customer which will open the **Contract Details** screen, click on the **Activities** button followed by the **Make A Payment** button to open the **Payment Options** screen.

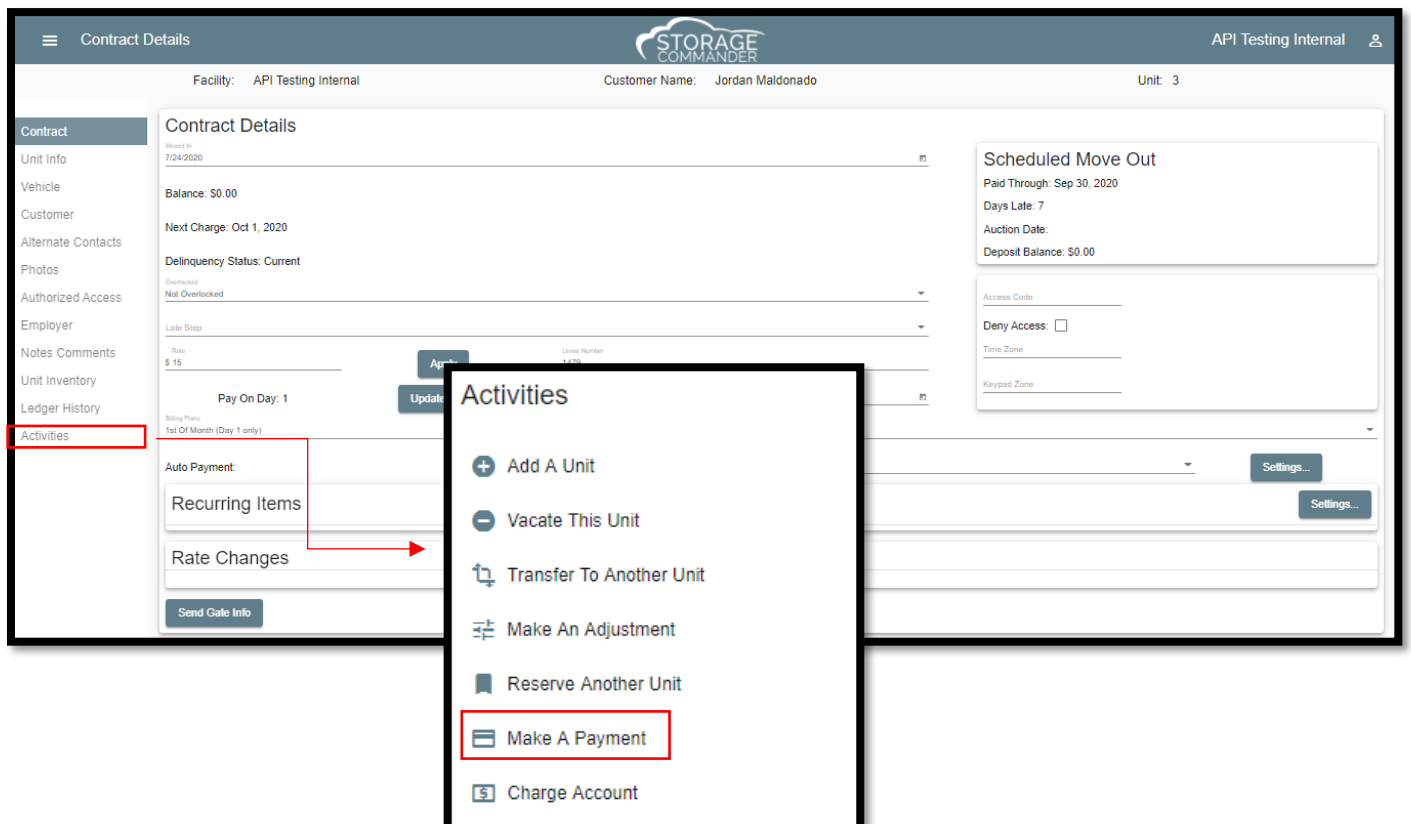


Using the Units Screen

The Units screen lists all Units and Contracts (Customers). A payment can be initiated by **right** clicking on an occupied unit and selecting **Payment**.



The other option would be by **double** clicking on the customer which will open the **Contract Details** screen, click on the **Activities** button followed by the **Make A Payment** button to open the **Payment Options** screen.



Paying on an Inactive (Moved Out) Customer

To enter a payment on a customer who has moved out of the facility, click on the **Customer** or **Units** tab, select Filters and click **Show Inactive** and locate the customer in the contacts list (inactive customers can be easily identified by a line through their name). There are two different ways this can be completed on the customer tab.

Right Click on the customer's name and select payment.

The screenshot shows the 'Search Contracts' interface. At the top, there is a search bar labeled 'Search Contracts...'. Below it, the 'Filters' section is active, showing 'Search Options' and 'Contract Options'. The 'Show Inactive' checkbox is checked. A list of customers is displayed below the filters. The customer 'Gerst' is highlighted, and a right-click context menu is open over it. The menu options are: Details, Moveout, Payment (highlighted), Transfer, Adjustment, and Charge Account. Red arrows point from the text 'Inactive (Moved Out) customers' to the 'Gerst' customer name and the 'Payment' option in the context menu.

Name	Unit Name	Status
Gerst	1	Reserved
Gerst	1	Reserved
Mike-Gerst	1	Reserved

Click on the customer name to open **Contract Details** and select the **Activities** button. If the customer was moved out with a balance due there will be a button **Make A Payment** available in the **Activities for This Account** screen, click on the **Make A Payment** button to process the payment.

The screenshot shows the 'Contract Details' interface. The top header includes the 'STORAGE COMMANDER' logo and the text 'API Testing Internal'. Below the header, the 'Facility' is 'API Testing Internal', the 'Customer Name' is 'THOMAS HUNTINGTON', and the 'Unit' is '1'. The left sidebar contains a list of tabs: Contract, Unit Info, Vehicle, Customer, Alternate Contacts, Photos, Authorized Access, Employer, Notes Comments, Unit Inventory, Ledger History, and Activities. The 'Activities' tab is selected. The main content area shows a list of activities: Add A Unit, Vacate This Unit, Transfer To Another Unit, Make An Adjustment, Reserve Another Unit (highlighted with a red box), Make A Payment, and Charge Account. A red arrow points from the 'Activities' tab in the sidebar to the 'Reserve Another Unit' button.

Payment Options

After the customer has been selected the **Payment Options** screen will open. From here you can set the number of payments that will be processed against the customer account. You can also apply additional **Fees**, add **Discounts**, add **charges** for additional **Deposits** **Services**, or attach to the account

Use the **up and down** arrows to apply Pre-Payments to this payment.

The **Current transaction** section will show any new items being added to this payment.

The **Past Due** section will show all charges that have already been posted to this account.

The **Summary** section will show the total dollars being applied to all income categories.

Payment Options (API Testing Internal)

Contracts Merchandise **Payment Options** Accept Payment

2 - Steven Smith

Rate: \$123.21
Paid Through: 10/31/2020
Billing Plan: 1st Of Month
Projected Paid Through: 11/30/2020

Products On Contract:

- Notice of Lien Sale : \$25.00
- Moving Truck : \$3.95

Current Transactions

Past Due

Date	Description	Amount
11/1/2020	1st Of Month: 11/1/2020	\$123.21
11/1/2020	Notice of Lien Sale	\$25.00
11/1/2020	Late	\$10.00
11/1/2020	Early Move Out Fee	\$50.00

Summary - All Contracts

Category	Amount
Rent Due	\$123.21
Merchandise	\$0.00
Discounts	\$0.00
Insurance	\$0.00
Fees	\$85.00
Taxes Due	\$0.00
Deposit Due	\$0.00
Total Due	\$208.21

Buttons: Previous, Next, Submit

To add additional **Fees**, **Discounts**, **Services** or **Deposits to this payment**, click on the **Add Products** button and select the item from the list. Once selected, it will appear in the **Products on Contract** box. Items will not be added to the payment until you click on the **Calculate** button.

Click on the **Delete** button to remove an item from the payment.

Click in the **Wave Item** box to enter an offsetting credit against the fee that is being charged to the account.

Select the **order** in which transactions will be paid when partial payments are made.

Click on the **Next** button or the **Accept Payment** tab to proceed to the payment screen.

Selecting Payment Order

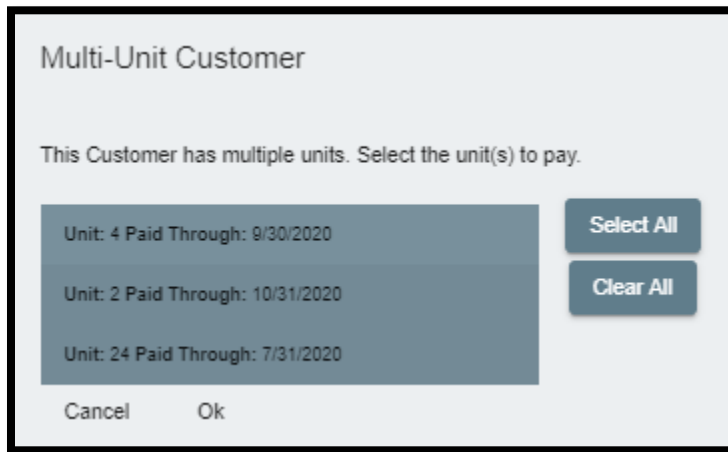
By default, Storage Commander will apply partial payments to the oldest balance on the account (typically this would be the oldest rent charge), you can however change the sequence in which a partial payment is applied by selecting the **Pay Now** button adjacent to each transaction item. This will allow you to pay on late fees first with any remaining money applied to rent.

Multi-Unit Payment

Selecting a customer who has multiple units that have been linked together, will bring up the **Multi-Unit** payment selection screen, displaying all units that are associated (linked) to this customer's account. You can select individual units, or multiple units (by clicking on each unit while holding the **Ctrl** key down), you can also select all units by clicking

on the **Select All** button. Clicking on a highlighted unit (previously selected unit) will de-select the unit from the payment process, clicking on the **Clear All** button will de-select all units from the payment process and disable the **OK** button.

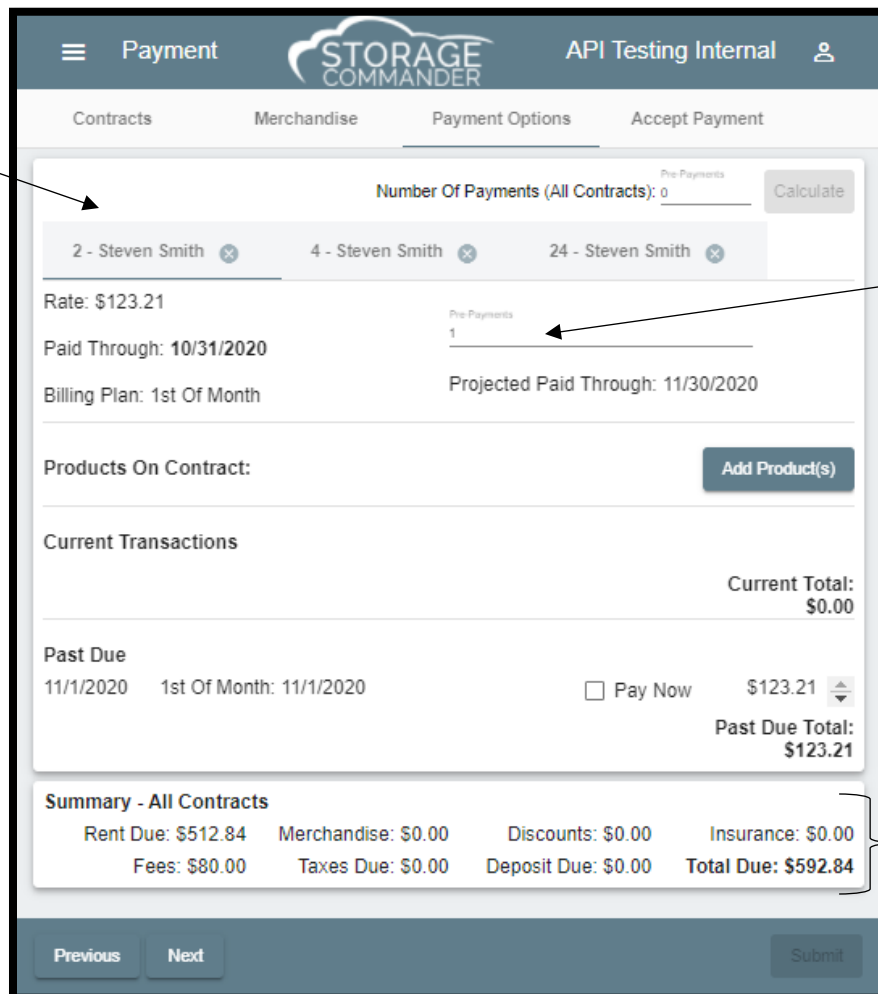
Once you have selected the units for payment click on the **OK** button to proceed to the **Payment Options screen**.



A screenshot of a 'Multi-Unit Customer' selection screen. It has a title bar 'Multi-Unit Customer' and a subtitle 'This Customer has multiple units. Select the unit(s) to pay.' Below this is a list of units: 'Unit: 4 Paid Through: 9/30/2020', 'Unit: 2 Paid Through: 10/31/2020', and 'Unit: 24 Paid Through: 7/31/2020'. To the right of the list are two buttons: 'Select All' and 'Clear All'. At the bottom are 'Cancel' and 'Ok' buttons.

After clicking on the **OK** button, the **Payment Options Screen** is displayed. As mentioned in the previous page, this screen will detail all the elements that comprise this payment. The only difference between this example and the example on the previous page is the selection for **Number of Payments (All Contracts)** and a series of tabs for all units linked to this customer.

Clicking on a Unit tab will display the payment details for that unit.



A screenshot of the 'Payment Options Screen' for 'STORAGE COMMANDER'. The screen has a top navigation bar with 'Payment', 'API Testing Internal', and a user icon. Below this are tabs: 'Contracts', 'Merchandise', 'Payment Options' (selected), and 'Accept Payment'. The main content area shows 'Number Of Payments (All Contracts): 0' with a 'Calculate' button. Below this are three unit tabs: '2 - Steven Smith', '4 - Steven Smith', and '24 - Steven Smith'. The '24 - Steven Smith' tab is selected. The screen displays payment details: 'Rate: \$123.21', 'Paid Through: 10/31/2020', 'Billing Plan: 1st Of Month', and 'Projected Paid Through: 11/30/2020'. There is a 'Pre Payments' section with a value of '1'. Below this is a 'Products On Contract' section with an 'Add Product(s)' button. The 'Current Transactions' section shows a 'Current Total: \$0.00'. The 'Past Due' section shows '11/1/2020', '1st Of Month: 11/1/2020', a 'Pay Now' checkbox, and a 'Past Due Total: \$123.21'. At the bottom is a 'Summary - All Contracts' section with a table of charges: Rent Due (\$512.84), Merchandise (\$0.00), Discounts (\$0.00), Insurance (\$0.00), Fees (\$80.00), Taxes Due (\$0.00), Deposit Due (\$0.00), and Total Due (\$592.84). The screen has 'Previous', 'Next', and 'Submit' buttons at the bottom.

Select the number of payments for the entire range of units or select the number of payments for individual units.

Summary – All Contracts, shows how the payment is applied.

Processing a Payment

This is the last screen in the payment process and is where you select the type of payment being received (Cash, Check or Credit Card) individually or any combination of the three payment types.

Cash Payment

If the payment received is lower than the balance due, the Balance field will show the remaining balance on the unit. If the payment received is more than the balance on the unit, an **over payment** will appear. The over payment will **Apply as Prepayment** and will be posted as a credit/ pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.

Enter the amount of payment here if it is different than what has been calculated.

Select **Cash** for cash payments.

If the payment is going to be split between cash and another payment type, enter the amount of the cash

If cash received exceeds what is due, it will apply as Prepaid rent on the customer account.

Payment Summary	
Cash:	\$600.00
Check:	\$0.00
Credit:	\$0.00
Debit:	\$0.00
Total Payment:	\$600.00
Balance:	-\$7.16

Check Payment

To enter a check payment, click on the check box next to **Check**, the **Check Amount** field will automatically be filled in with the payment balance that was calculated in the Payment Options screen. If the payment that is being applied is different than the amount calculated, enter the amount of the check into the **Check Amount** field. If the payment received is lower than the balance due, the **Balance** field will show the remaining balance on the unit.

If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.

The check number, account number and bank routing numbers can be automatically entered into the check payment screen by scanning the check.

The **Payment Summary** will list how the payment was received and display the balance on the unit.

Process ACH by selecting this option will automatically deposit the check into your checking account.

If the check is to be automatically deposited select the **Account Type** & **Account Class** prior to clicking on the **Process ACH** button.

Payment Summary	
Cash:	\$0.00
Check:	\$15.00
Credit:	\$0.00
Debit:	\$0.00
Total Payment:	\$15.00
Balance:	\$0.00

The balance due will be automatically entered, if the check payment is for a different amount, enter the check amount here.

If the payment is being split between check and another payment type (cash or credit card), enter the amount of the check payment here.

Credit Card Payment

To enter a credit card payment, click on the check box next to **Credit Card**, the **Amount** field will automatically be filled in with the payment balance that was calculated in the Payment Options screen. If the payment that is being applied is different than the amount calculated, enter the amount of the check into the **Amount** field. If the payment received is lower than the balance due, the **Balance** field will show the remaining balance on the unit.

If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.

Manually Enter Card Payment (Without a Terminal)

To manually enter a card payment through the Browser, Click Manually Enter Card, enter the customer's name, address, and card information.

Once the information is entered, select "Charge Card".

NOTE: This will charge the full amount unless the amount is changed on the payment window.

SPECIAL NOTE: Do not exit the window until the transaction is completed.

Name on Account	Storage Commander
Address Line 1	28999 Old Town Front Street
Zip	92590
Card Number	5454 5454 5454 5454
Expiration	12/25
CVV	123
<button>Charge Card</button>	

Removing a Credit Card from Card on File List

In the **Select Prior Card** field click on the Remove button to the right of the card number to be removed.

Select one of the three previous credit cards used in the past on this account.

Clear will remove credit cards from the stored credit card list.

To record a credit card, charge without charging the card you will select **Previous Transaction**.

Payment API Testing Internal

Contracts Merchandise Payment Options **Accept Payment**

☐ Cash ☐ Check ☒ Credit/Debit

Select Prior Card

Name On Card
John Smith

Billing Address
28999 Old Town Front Street

Billing Zip
92590

Approval Code
MMYY
01/22

Amount
\$ 15

☐ Previous Transaction

☐ Enroll Automatic Payment

Select **Credit Card** as the payment type.

To scan a credit card, select the **Card Terminal** icon that has been installed on your system.

To manually enter a credit card, select **Manually Enter Card** and enter the credit card number into the **Credit**

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

Debit Card Payment

To enter a debit card payment, click on the check box next to **Credit/ Debit**, the **Amount** field will automatically be filled in with the payment balance that was calculated in the **Payment Options screen**. If the payment that is being applied is different than the amount calculated, enter the amount of the payment into the **Amount** field. If the payment received is less than the balance due, enter the actual amount of the payment into the **Amount** field. Once the payment amount is entered the **Balance** field in the Payment Summary section will show the remaining balance on the unit.

Payment API Testing Internal

Contracts Merchandise Payment Options **Accept Payment**

☐ Cash ☐ Check ☒ Credit/Debit

Select Prior Card

Name On Card
John Smith

Billing Address
28999 Old Town Front Street

Billing Zip
92590

Approval Code
MMYY
01/22

Amount
\$ 15

☐ Previous Transaction

☐ Enroll Automatic Payment

When the Card Terminal button is clicked, you will be prompted to enter the customers card number, zip code and expiration date.

Click on the Submit button to complete the payment.

Setting up Auto Payments

Storage Commander can be configured to automatically process credit card payments when rent is charged. To enroll a customer into Automatic Payment, on the payment screen click the check box next to Enroll Automatic Payment.

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

Payment

STORAGE COMMANDER

API Testing Internal

Contracts Merchandise Payment Options Accept Payment

☐ Cash ☐ Check ☒ Credit/Debit

Select Prior Card

Name On Card
John Smith

Billing Address
28099 Old Town Front Street

Billing Zip
92590

Approval Code
MM/YY 01/22

Amount
\$ 15

☐ Previous Transaction ☐ Enroll Automatic Payment

Click on the Submit button to complete the payment.

Enter the credit card information and select **OK**.

To enroll a customer into **Automatic Payment** without charging the customer on the **Customer Contract Details** screen the drop-down menu next to Auto Payment. **Select Credit Card**.

Contract Details

STORAGE COMMANDER

API Testing Internal

Facility: API Testing Internal Customer Name: Blair Power Unit: 1

Contract

Unit Info

Vehicle

Customer

Alternate Contacts

Photos

Authorized Access

Employer

Notes Comments

Unit Inventory

Ledger History

Activities

Contract Details

Moved In
12/29/2020

Balance: -\$15.00

Next Charge: Feb 28, 2021

Delinquency Status: Current

Overlooked
Not Overlooked

Late Step
None

Apply

Pay On Day
29

Update...

Auto Payment Type
None

Settings...

Scheduled Move Out

Paid Through: Feb 27, 2021

Days Late: -39

Auction Date:

Deposit Balance: -\$25.00

Access Code

Deny Access: ☐

Time Zone

Keypad Zone

Recurring Items

Rate Changes

Send Gate Info

Partial Payments

To process a partial payment (a payment being made for less than the balance on the account), from the **Accept Payment** window enter the amount to be applied to the account into the **Amount** field.

STORAGE COMMANDER API Testing Internal

Contracts Merchandise Payment Options **Accept Payment**

☒ Cash ☐ Check ☐ Credit/Debit

Money Received
\$ 15

Payment Summary

Total Amount Due: \$20.00

Cash:	\$15.00
Check:	\$0.00
Credit:	\$0.00
Debit:	\$0.00
Total Payment:	\$15.00
Balance:	\$5.00

Previous Next Submit

Enter the amount of the Partial Payment here.

The Total Amount Due reflects the balance due on the account.

The Total Payment shows the amount of the Partial Payment.

The Balance indicates the balance on the account after the Partial Payment is applied.

When the amount of the partial payment has been entered, the payment summary section will show the total payment being made and the new balance due on the account.

NOTE: Partial payments will be applied towards the oldest balances on the account. This is typically rent but could be fees or insurance if these balances are older.

Reversing a Payment

Payments can be reversed within the day (before the **End of Day** process) the payment was entered if a payment needs to be reversed after the close of business you will need to make an adjustment to the customer account to charge back the amount of the incorrect payment.

From the **Customer or Units** screen double click on the customer. In the left margin locate and click on the **Ledger/History** button. Locate the payment to be reversed and right click on the payment transaction item, click on the Reverse Transaction item in the action box and select OK at the prompt to proceed.

A **Reversed Payment** entry will be posted to the customer ledger, and the amount of the payment will be charged back to the account.

The screenshot shows the 'Contract Details' screen for 'API Testing Internal' facility and 'Blair Power' customer. The 'Ledger/History' tab is selected in the left sidebar. The main area displays a list of payments for 'Unit: 1'. Each payment entry includes a 'Reverse' button, a 'Smartbox Receipt' icon, and a timestamp. The payments are as follows:

Payment Type	Amount	Unit	Smartbox Receipt	Date/Time	Ending Balance
Payment Cash	\$15.00	Unit: 1		01/21/2021 8:34 AM	(\$15.00)
Payment Cash	\$8.00	Unit: 1		01/21/2021 8:34 AM	(\$8.00)
Payment Cash	\$7.00	Unit: 1		01/21/2021 9:10 AM	(\$30.00)

At the bottom, there are buttons for 'Print History' and 'Insert Document'. Below these are radio buttons for 'History for 1' (selected) and 'History for Blair Power', and another set of radio buttons for 'Manager View' (selected) and 'Accountant View'. 'Previous' and 'Next' buttons are on the bottom left, and a 'Submit' button is on the bottom right.

Click on the **Ledger/History** tab, locate the Reverse button and select to reverse payment.

The reversed payment will be included in the **Reversed Transactions, Transaction Detail** and **Transactions Summary** reports. All references to the payment will be removed from all financial reports and added to the Reversed Payments report.

Credit card or Debit card transaction will also be reversed providing this feature is turned on in the Configuration Manager. For information on how to setup this feature please refer to the Configuration Manager manual under section **“General Operations / Void credit card on reversed transaction”**.

Move-In

Move-In Methods

Storage Commander allows you to use different methods to initiate the move-in process. You can choose from any of the methods that you feel most comfortable with as they will all deliver the same result.

We will start by showing you all the move-in methods

Activities Menu

Located at the top left of the screen, click on the **Activities Menu** Button in the Tool Bar, followed by clicking on the **Move In**

Unit Selection: Select the unit you would like to assign to the customer. If you are looking for a specific unit size, type, or configuration, you can filter the available unit list by any combination of the following:

TYPE Storage Unit, RV Parking, Mailbox, Wine Locker, or any other type that was created for your facility.

SIZE By unit size.

ATTRIBUTES.....Created and assigned to units through the Configuration Manager program.
(In this example we have created several attributes for the writing of this manual)

CAMPGROUND

CLIMATE CONTROLLED

DRIVE UP ACCESS

HANDICAP ACCESSIBLE

RV PARKING

STANDARD STORAGE

UTILITY SERVICES

You can limit the available units that are displayed by using the unit and attributes filters

Move In

STORAGE COMMANDER

API Testing Internal

Facility: API Testing Internal Customer Name: Unit:

Select Unit

Customer

Vehicle Info

Alternate Contacts

Photos

Authorized Access

Employer

Notes/Comments

Merchandise

Insurance

Billing Details

Accept Payment

Filter

Unit Type Unit Condition Unit Size

Unit Status Unit Attributes Clear

Unit: 8

Status: Available

Floor: Cold Storage

Type: Cold Storage

Has Vehicle

Size: 5 X 5

Condition: Ready

Rate: \$15.00

Unit: 95

Status: Available

Floor: Standard Storage

Type: Standard Storage

Has Vehicle

Size: 10 X 20

Condition: Ready

Rate: \$120.00

Previous Next Submit

Selecting any combination of unit attributes, size, condition, type or status will cause the available unit list to automatically show the units that meet the selected criteria.

Once the unit is selected it will become highlighted. Click **Next** to Proceed.

Move-In using the Units Screen

To start a move-in from the Units screen, click on the Units and select an available unit from the units list.

You can narrow down the available units that are displayed by using the unit and attributes filters.

Starting the Move-In Process

Customer Tab

After the storage unit has been selected the next step is to enter the Customer Information. This consists of the customers name, address, telephone number and other information that can be used to contact the customer. Fill in the customer information fields as required using the Tab key or mouse to move from field to field.

Customer Tab

You can move to any of the setup tabs at any time.

Click on the **New** buttons to add addresses and phone numbers to the account.

If the customer has other units click here to and select the customer from the list.

Selecting the **Can Receive Text** option allows this customer to receive text messages generated through the program.

Advanced Vehicle Storage Information

During the move in process selecting the **Vehicle Tab** will open the **Vehicle information screen**. From this screen you will be able to enter critical information covering insurance status, vehicle identification numbers, DMV information in addition to other valuable data that can be used to insure you that the vehicles stored at your facility are adequately identified.

The screenshot displays the 'Vehicle Information' screen in the Storage Commander application. The interface includes a sidebar with navigation options like 'Select Unit', 'Customer', 'Vehicle Info', 'Alternate Contacts', 'Photos', 'Authorized Access', 'Employer', 'Notes/Comments', 'Merchandise', 'Insurance', 'Billing Details', and 'Accept Payment'. The main content area is titled 'Vehicle Information' and contains several sections for data entry:

- Vehicle (automobile, motorcycle, RV) information section:** This section includes fields for Make, Model, Color, Year, Body Style, Estimated Value, Type Desc, License Plate, License State, Title Number, Reg Expiration, Vin, Tenant Owned (checkbox), Owner, Insurance Company, Insurance Policy, Insurance Expiration, and Vehicle Type.
- Boat information section:** This section includes fields for Length and Type.
- Boat Motor information section:** This section includes fields for Motor Type and Horsepower.
- Trailer information section:** This section includes fields for Length and Type.

At the bottom of the form, there are 'Previous' and 'Next' buttons on the left and a 'Submit' button on the right.

Entering Data into the Vehicle Information Screen

If the **Vehicle Info** tab is not visible this signifies that the space, you have selected is not configured to accept vehicles. If you wish to change the unit configuration to allow vehicles, click on the **Select Unit** tab and scroll to the unit/space number you are moving the customer in to. Once you have located the space number click on the **Has Vehicle** check box.

Enter as much information pertaining to the vehicle as possible, keeping in mind the more information that is entered will provide more concise reports and improved vehicle tracking.

Available Vehicle Information Reports

Vehicle reports can be printed at any time and can also be included in report groups, allowing the reports to be automatically printed / emailed on specific time frames (daily, weekly, monthly annually).

The Vehicle Information reports are in the **Reports** section of Storage Commander under:

Unit

- Vehicle Expirations
- Vehicle Insurance Expirations
- Vehicles

Analysis

- Length of Stay

Adding Alternate Contacts

Fill in the Alternate Contact information fields as required using the Tab key or mouse to move from field to field.

This information will aid you in locating the primary occupant in case of emergency or for collections purposes.

Alternate Tab

Click on the **New** buttons to add addresses and phone numbers to the account

Move In

STORAGE COMMANDER

API Testing Internal

Facility: API Testing Internal Customer Name: Steve Smith Unit: 8

Select Unit

Customer

Vehicle Info

Alternate Contacts

Photos

Authorized Access

Employer

Notes/Comments

Merchandise

Insurance

Billing Details

Accept Payment

First Name Middle Name Last Name *

☐ Business Business Name

Website ☐ Do Not Rent Again

Tax Id ☐ Tax Exempt ☐ Is Military Military Status: None Branch

Email Birthdate: 1/22/2021

Driver's License DL State Exp. Date: 1/22/2021 SSN

Addresses

(Primary)

New... Delete

Phone Numbers

(Primary)

New... Delete

Decline Alternate

Previous Next Submit

Adding Photos

Adding a customer's photo ID to the customer's account allows for easy visual identification. To add a photo ID during a move-in, click on the Photo tab to display the photo ID screen and click on the **New Button**. The Import feature allows pictures taken from digital cameras to be added to a customer account. To add digital pictures, click on the **Import** button and navigate to the drive/folder where the picture resides, select the picture and click on the **Open** button. Enter a **Reference Name** and click on the **OK** button to add the new picture to the customer account.

Click on the Photos tab and then on the New Button to select the ID scanner.

Move In

STORAGE COMMANDER

API Testing Internal

Facility: API Testing Internal Customer Name: Steve Smith Unit: 8

Select Unit

Customer

Vehicle Info

Alternate Contacts

Photos

Authorized Access

Employer

Notes/Comments

Merchandise

Insurance

Billing Details

Accept Payment

Reference Name

Import...

Submit

New...

Previous Next Submit

Deleting Pictures

To delete a photo ID from a customer account, open the Customer Details screen for the account and select the **Photos** tab. Click on the photo to be deleted (you can have multiple photos assigned to an account) and click on the **Delete** button.

Click on the Delete button to erase the photo.

The screenshot shows the 'STORAGE COMMANDER' interface. At the top, it says 'Move In' and 'API Testing Internal'. Below that, 'Facility: API Testing Internal', 'Customer Name: Steve Smith', and 'Unit: 8' are displayed. A left sidebar lists various tabs: Select Unit, Customer, Vehicle Info, Alternate Contacts, **Photos**, Authorized Access, Employer, Notes/Comments, Merchandise, Insurance, Billing Details, and Accept Payment. The 'Photos' tab is active, showing a photo of a plant with a red 'Delete' button below it. At the bottom, there are 'Previous', 'Next', and 'Submit' buttons.

Adding Authorized Access

To add an authorized access, fill in the Authorized Access information fields as required using the Tab key or mouse to move from field to field.

Adding Employer Information

Fill in the Employer Information fields as required using the Tab key or mouse to move from field to field. This information will aid you in locating the primary occupant in case of emergency or for collections purposes.

Employer Tab

Click on the **New** buttons to add addresses and phone numbers to the account.

The screenshot shows the 'STORAGE COMMANDER' interface with the 'Employer' tab selected in the sidebar. The main form contains fields for First Name, Middle Name, Last Name, Business (checked), Business Name, Website, Do Not Rent Again (checkbox), Tax Id, Tax Exempt (checkbox), Is Military (checkbox), Military Status (None), Branch, Email, Birthday (1/22/2021), Driver's License, DL State, Exp. Date (1/22/2021), and SSN. Below these fields is an 'Addresses' section with a '(Primary)' button, a 'New...' button, and a 'Delete' button. At the bottom, there are 'Previous', 'Next', and 'Submit' buttons.

Adding Move-In Notes / Comments & Alerts

Adding **Notes, Comments or Alerts** during a move-in allows you to add general or even critical information to a customer account. Both Notes and Alerts can be edited or even removed from an account at any time, whereas Comments **CANNOT** be edited or removed once they have been added to an account.

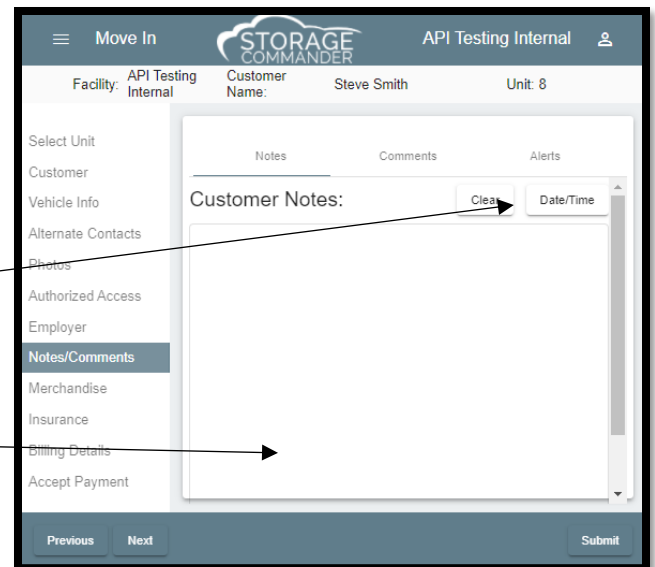
Adding Notes

From the Move-In window select **Notes/Comments** and click on the **Notes** Tab. Clicking on the Date/Time button will insert the current date and time into the note field. Enter the note by typing in the note box.

The note will be automatically saved when you leave the Notes screen.

Click on **Date/Time** to add the current date & time to the note.

Click on the **Notes** Tab, followed by clicking anywhere in the Notes box to enter the note.



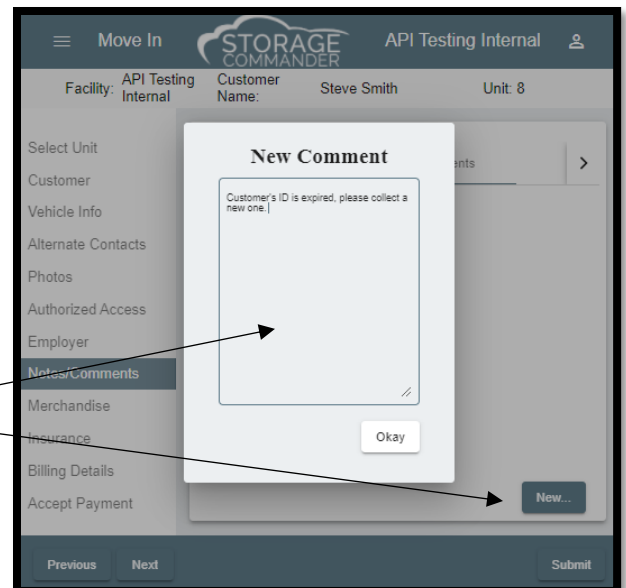
Adding Comments

Customer comments differ from customer notes in that once they are entered, a date and time stamp is automatically added to the note along with the ID of the logged in manager.

When the note is saved, it cannot be altered.

From the Move-In window select **Notes/Comments** and click on the **Comments** tab. Any comments that have been previously added to the account will be displayed. To add a new comment, click on the **New** button and enter the note into the **New Comment** box, click on the **OK** button to save the new comment. Once the comment is saved it will be added to the comments box with the Username (manager) and the date and time of when the comment was recorded.

Click on the **New** button to add a new comment to the customer's account.



Note: It is strongly recommended that you review the message prior to saving it, as the message cannot be edited or removed from the customer account once it has been saved.

Adding Alerts

Alert messages allow messages to be posted to a customer's account that will be automatically displayed whenever any type of account activity is detected.

From the Move-In window select **Notes/Comments** and click on the **Alerts** Tab. Clicking on the Date/Time button will insert the current date and time into the note field. Enter the note by typing in the note box.

The alert note will be automatically saved when you leave the Alerts screen.

Adding Merchandise

Merchandise sales can be included during Move-in by clicking on the **Merchandise tab**. When the merchandise items have been selected, proceed through the rest of the tabs to complete the Move-in and merchandise sale.

Click on the **Add to Cart** button to add the item to the transaction.

Click on **the Next** button to move to the next tab.

The screenshot shows the 'Move In' screen for 'API Testing Internal' facility, customer 'Steve Smith', and unit '8'. The 'Merchandise' tab is selected in the left sidebar. The main area displays a list of items: 'Locks' (Count: 2) with 'Pad Lock' (Price: \$3.00, Stock: 3) and 'Disk Lock' (Price: \$7.00, Stock: 3), 'Boxes' (Count: 3), and 'Moving Supplies' (Count: 3). Each item has an 'Add to Cart' button. Below the list is a 'Merchandise Cost' section showing a 'SubTotal' of '\$0.00'. At the bottom are 'Previous', 'Next', and 'Submit' buttons.

Adding Insurance

Clicking on the Insurance tab opens the insurance policy selection screen. 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.

Click on the **Insurance** button to add the item to the transaction.

Click on **the Check Box** next to the desired insurance policy followed by the **Next** button to move to the next tab.

The screenshot shows the 'Move In' screen for 'API Testing Internal' facility, customer 'Steve Smith', and unit '8'. The 'Insurance' tab is selected in the left sidebar. The main area displays the 'Select Coverage' screen. It includes a 'Status' section with a checkbox for 'Customer Declines Insurance'. Below is a table of insurance policies:

Policy Description	Price	Check Box
Burglary (\$5,000 @ 100%)	\$16.95	<input type="checkbox"/>
Burglary (\$10,000 @ 50%)	\$19.95	<input type="checkbox"/>
Burglary (\$15,000 @ 100%)	\$44.95	<input type="checkbox"/>
Burglary (\$10,000 @ 100%)	\$31.95	<input type="checkbox"/>
Burglary (\$1,000 @ 50%)	\$6.95	<input type="checkbox"/>
Burglary (\$1,000 @ 100%) T	\$10.95	<input type="checkbox"/>
Burglary (\$15,000 @ 50%)	\$34.95	<input type="checkbox"/>
Burglary (\$5,000 @ 50%)	\$9.95	<input type="checkbox"/>

At the bottom are 'Previous', 'Next', and 'Submit' buttons.

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

Adjust the date of the move-in.

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

Displays current rate of unit

Select Billing Plan to be assigned to customer account

Assign a Lease Number to customer account

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

The screenshot shows a form with the following fields and annotations:

- Rate:** \$ 15.00 (Annotated: "Enter a new rate when using the Revert Rate feature")
- Move-In:** 1/22/2021 (Annotated: "Adjust the date of the move-in.")
- Revert Date:** 2/21/2021 (Annotated: "Select Revert Date to temporally change the rate on the unit for a specific period.")
- Size:** 5 X 5 (Annotated: "Displays current rate of unit")
- Number of Payments:** 1 (Annotated: "Increase / Decrease the number of rental payments")
- Billing Plans:** 1st Of Month (Annotated: "Select Billing Plan to be assigned to customer account")
- Access Code:** 1234 (Annotated: "Select to assign gate code, gate time zone & keypad zone")
- Lease Number:** 78910 (Annotated: "Assign a Lease Number to customer account")
- Time Zone:** 1
- Lease Expiration:** 12/31/2021
- Keypad Zone:** 1
- Buttons:** Calculate, Dont Prorate (Annotated: "Removes the 1st month prorated rent (only available on fixed billing plans)")

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

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

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

The screenshot shows the full Move-In Billing screen with the following sections and annotations:

- Header:** Move In, STORAGE COMMANDER, API Testing Internal, Unit: 8
- Left Sidebar:** Select Unit, Customer, Vehicle Info, Alternate Contacts, Photos, Authorized Access, Employer, Notes/Comments, Merchandise, Insurance, Billing Details (selected), Accept Payment
- Main Form:**
 - Contact Type:** Phone (Annotated: "Contact Type: How did the customer find your facility")
 - Contact Category:** Military (Annotated: "Contact Category: Used to profile customer. Military, Local Resident, Senior....")
 - Contact Source:** Coupon (Annotated: "Contact Source: What type of advertising directed the customer to your facility")
 - Reason For Renting:** Clean Facility (Annotated: "Reason for Renting: What sold the customer on your facility")
 - Rate:** \$ 15.00
 - Move-In:** 1/22/2021
 - Revert Date:** 2/21/2021
 - Size:** 5 X 5
 - Number of Payments:** 1
 - Billing Plans:** 1st Of Month
 - Access Code:** 1234
 - Lease Number:** 78910
 - Time Zone:** 1
 - Lease Expiration:** 12/31/2021
 - Keypad Zone:** 1
 - Buttons:** Calculate, Dont Prorate
- Products On Contract:**
 - Invoice Fee: \$2.00
 - Add Product(s)** button
 - Delete** button
- Current Transactions:**
 - 1st Of Month: 1/22/2021
 - Invoice Fee: \$4.90
 - Waive Item** checkbox
 - Total:** \$6.90
- Summary - All Contracts:**
 - Rent Due: \$4.90
 - Fees: \$2.00
 - Merchandise: \$0.00
 - Taxes Due: \$0.00
 - Discounts: \$0.00
 - Deposit Due: \$0.00
 - Insurance: \$0.00
 - Total Due:** \$6.90

Changing Move-In Date

Click on the down arrow in the **Move-In date** field to change the date of the move-in. By default, the move-in date will be set to the current date. By changing the date, the prorated rental charge will be re-calculated (fixed billing plans) and the new move-in date will be recorded to the customer account.

This field is security protected and can be enabled or disabled through the **Configuration Manager**.

Changing the Rental Rate, at Move In

The default rental rate referenced in the **Rate** field can be changed by clicking inside the rate field and entering the new rate. Once the rate is changed it will remain in effect until the customer moves out (at which time the rate will change back to the default rate) or until a rate change is applied to the customer (see Rate Change discussed later in this manual).

This field is security protected and can be enabled or disabled through the Configuration Manager.

Setting a Revert Rate, at Move In

Setting a **revert rental rate** during a move in like changing the rental rate, as discussed above. The difference between the two processes is that using the **Revert Rate** feature allows the modified rental rate to be active for a pre-determined period before it automatically returns to the street rate.

Click inside the **Rate field box** and enter the new rate, click on the **Revert Rate** check box and enter the date the modified rate will expire and return to the current street rate.

Changing the Number of Payments

To process payments in addition to the rental payment for the current month, increase the number of advanced payments in the **Number of Payments** field. After entering the number of advanced payments, click on the **Calculate** button to add the prepayments into the **Current Transactions** section.

Projected Paid Through Date

The date referenced in the **Projected Paid Through** field shows the month, date and year the account will be paid through based on the number entered the **Number of Payments** field.

Selecting the Billing Plan

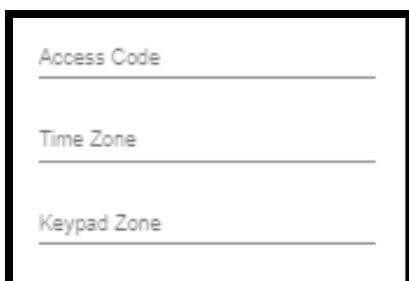
Billing plans are created and setup in the **Configuration Manager** program, and then assigned to a facility. What you see when you open the Billing Plan window is a list of available billing plans that have been assigned to your facility. Each billing plan can be radically different from other plans, so care should be taken when selecting a billing plan for the current customer. For more information on **Billing Plans**, refer to the Configuration Manual.

Don't Prorate

Selecting **Don't Prorate** will remove the current months prorated rent from the move-in (Storage Commander will not charge the prorated rent). This feature will only work on billing plans that are configured to Prorate rent on move-in.

Lease Number

Enter the **Lease Number** that has been assigned to this move-in. If the merge code (Contract Number) has been included the move in contract the number entered here will be inserted into the move in contract.

A screenshot of a form titled 'Access Control' with three input fields: 'Access Code', 'Time Zone', and 'Keypad Zone'. Each field has a horizontal line for text entry.

Access Control

Click on the **Access Control** button to open the **Gate Access Details** window. Enter the customers gate access number that has been assigned to the customer into the **Access Code** field. If your gate security system supports multiple entry gates and gate access times, you can enter the codes for these features into the **Keypad** and **Time zone** fields. When the move-in is completed all access control settings will be sent to the gate system.

The **Deny Access** check box will disable the gate code at the keypad restricting the customers access into the facility.

Although this same function is automatically accomplished through the late step process, you can override the late step and manually deny the customer gate access by selecting this function.

To manually deny a customer’s gate access, select the **Contract Details** screen for the customer, select the **Contract** tab and click on the **Access Control** button to open the **Gate Access Details** window, click on the **Deny Access** check box to restrict the customers gate access. A check mark will appear in the box, clicking on the **Deny Access** box again will remove the check mark and grant the customers access into the facility.

Adding Fees, Discounts, Services & Deposits

Click on the **Tab** corresponding to **Fees, Discounts, Services and Discounts** called “**Add Products**” to open a list of associated items for the selected tab. Select an item by clicking on the **Add** button to the right of the item. Once selected the item will appear in the **Applied to Contract** section. Clicking on the **Calculate** button will add the items in the **Applied to Contract** window to the **Current Transactions** section, where they will be included in the move-in and attached to the customer account.

Products On Contract:

Add Product(s)

Admin : \$10.00

Delete

Current Transactions

The **Current Transactions** section lists all the transaction items that have been applied to this customers account during the move-in process. The amount due for each item, or if fees have been waved or credits/discounts have been applied, they will also be listed here (See illustration below).

Summary

The Summary section will break down and total each item contained in the current transaction section by account type and show the total due for the move-in (See illustration below).

Move In

STORAGE COMMANDER

API Testing Internal

Facility: API Testing Internal

Customer Name: test

Unit: 153, 8

Select Unit

Customer

Alternate Contacts

Photos

Authorized Access

Employer

Notes/Comments

Merchandise

Insurance

Billing Details

Accept Payment

☐ Cash

☐ Check

☒ Credit/Debit

Select Prior Card

Delete

Approval Code

MMYY 01/22

Name On Card

Billing Address

Billing Zip

Amount \$ 3.43

Card Terminal

Charge Prior Card

Manually Enter Card

☐ Previous Transaction

☐ Enroll Automatic Payment

Payment Summary

Cash: \$0.00

Check: \$0.00

Credit: \$0.00

Debit: \$0.00

Total Payment: \$0.00

Balance: \$3.43

Total Amount Due: \$3.43

Previous

Next

Submit

Move-In Payment Screen

This is the final screen used in the **Move-In** process and is where the type of payment is selected as well as how much money is being received. Select the payment type by clicking on the appropriate payment type check box.

Payment Type: Cash, Check, Credit/Debit

The payment amount that was calculated in the billing screen will be automatically entered into the payment screen. If the payment is different than the calculated amount due, enter the **ACTUAL** payment being received into the **Cash Received** field (for cash payments), **Check Amount** (for check payments), or **Amount** field (for credit or debit card payments).

If the payment amount is higher than the amount due on cash payments, an **Over Payment** box will appear allowing you to select how you would like to handle the overpayment; the options are:

Apply as Prepaid; Where the money in excess of the amount due, will be applied as a credit balance on the account.
Give Change Back; where the money in excess of the amount due, can be given back to the customer.

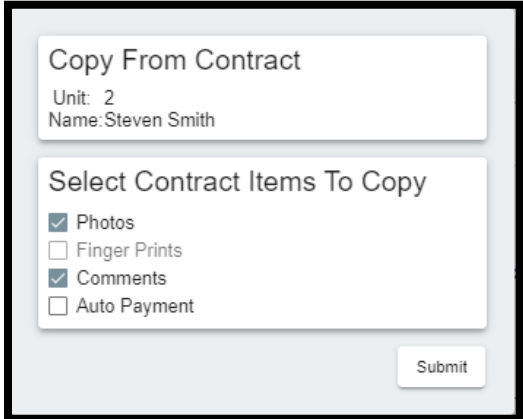
Adding Units to an Existing Customer

Additional units can be added to a customer account using one of two methods; by selecting an available unit and clicking on the “**Existing Customer**” Button in the **Move in Customer** screen and selecting the customer that you are adding a unit to from the **Select Contacts** list; or by selecting a customer, opening the **Details** window for the customer and clicking on the **Activities** tab. This will open the Activities window, from this window click on the **Add A Unit** button. Once the unit and customer have been selected specific contract details you wish to include in the new unit. Click on the

OK button to proceed with the move in.

Click on all items to be include in the additional unit.

Select **Auto-Payment** only if the current unit is on automatic credit card payment, and your customer would like the additional unit to be added to auto payment using the same credit card.



Copy From Contract

Unit: 2
Name: Steven Smith

Select Contract Items To Copy

- ☒ Photos
- ☐ Finger Prints
- ☒ Comments
- ☐ Auto Payment

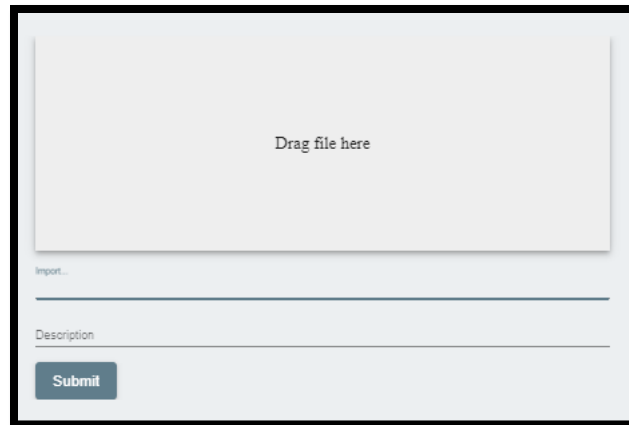
Submit

Importing Documents

The Insert Document feature allows documents or images (pictures) to be copied to a customer's history file. Once the document is attached to the account it can be viewed, emailed or printed at any time.

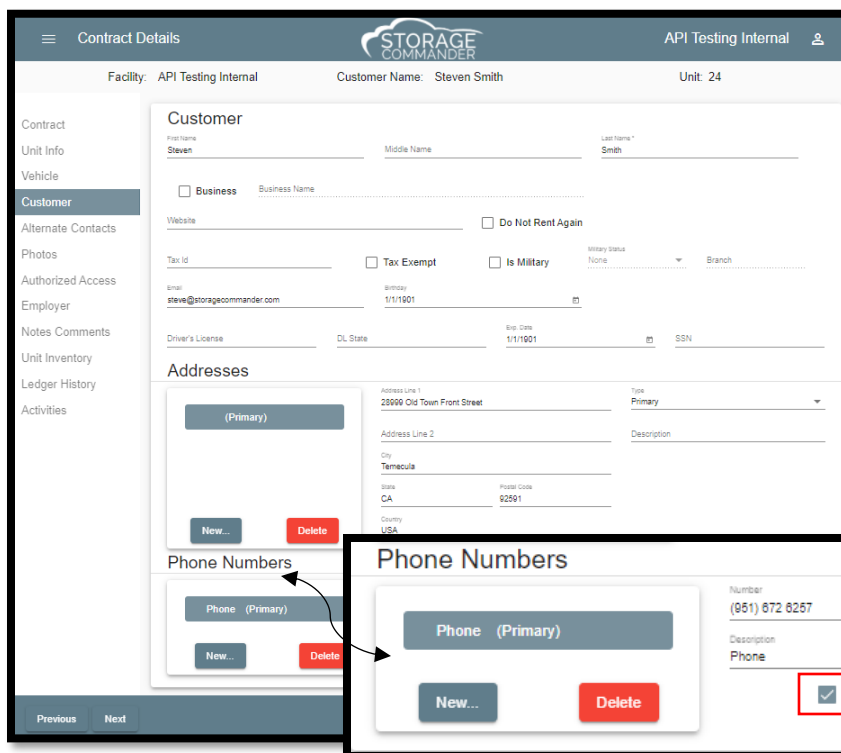
Documents can be inserted using one of two methods

Opening the **Ledger/ History** window in a customer account click on the **Insert Document** button, this will open the Insert Documents window.



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.

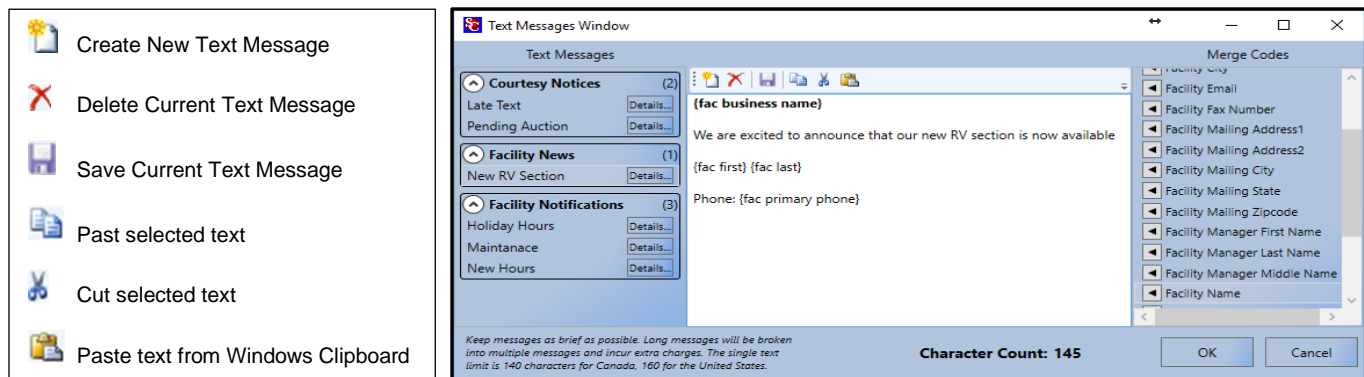




Text messages will only be sent to customers who have **opted** to receive them. To set a customer up to receive text messages, open the **Contract Details** window for the customer and click on the **Customer** tab. In the telephone section, enter the customers cell phone number and click on the **Can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

Click "Can Receive Text" to opt a customer in to receive texts.

Creating Text Messages

Text Messages can only be created in the **Storage Commander Configuration Manager**. 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.

Move Out

There are multiple ways to initiate the move-out process. Although the move-out may be initiated from different screens the overall process is the same. We will start this section by identifying all move-out techniques. Once you know how to initiate a move-out using any of the methods, we will walk you through the actual move-out procedure.

Activities Menu

The **Active Contracts (Customers)** Search Screen allows you to quickly locate a customer for move-out. Through this screen you can perform a search based on **Unit Number, Customer Name, or Customer Phone Number**. To start a search, select one or all the search parameters by placing a check mark in the appropriate check box. Once you have selected the search parameter enter the name, unit number or phone number into the **Search For** field. As you enter data into the search field Storage Commander will immediately list any match it finds in the database as you enter each

Customer Selection: Select the customer you would like to move-out.

Enter the search criteria into the Search For field.

Select search parameters.

A list of all customers matching the search criteria will be displayed in the Contract (customer) list box.

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

Name	Unit Name	Phone	Status	Moved-In
Blair Power	1		Current	12/29/2020
Steven Smith	2	(951) 672 6257	Current	06/24/2020
Jordan Maldonado	3		Current	07/24/2020
Steven Smith	4	(951) 672 6257	Current	07/02/2020
maldonado	5		Deny Gate Access	09/17/2020
Blair Power	6		Current	12/29/2020

Move-Out Billing

The **Move-Out** billing screen is the last major screen in the move-out process. From this screen you can add any last-minute **fees or discounts, change the calendar day of the move-out** (for first of the month or other “fixed” billing plans, this will cause the prorated rent to be re-calculated), and select a **Reason for Leaving**, which will be used in the Vacate Report.

Click in the **Move-Out Date** field to change the date of the move-out.

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

The **Current Transactions** section will show the amount of rent due or rent credit for the move-out as well as any additional fees or discounts that were applied.

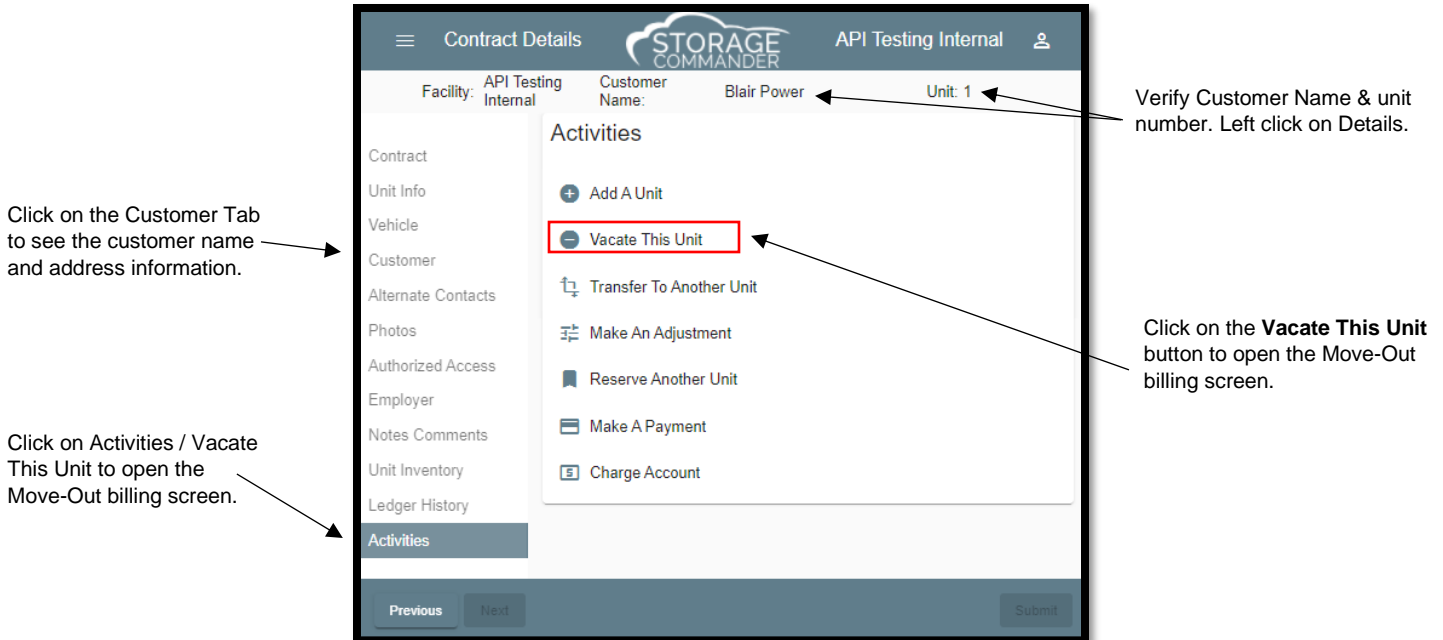
The **Past Due** section shows all charges that were assessed and not paid.

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

Summary - All Contracts			
Rent Due: \$0.00	Merchandise: \$0.00	Discounts: \$0.00	Insurance: \$0.00
Fees: \$0.00	Taxes Due: \$0.00	Deposit Due: (\$25.00)	Total Due: (\$25.00)

Initiate a Move-Out Through the Customer/Units Windows

Double clicking on a customer name on the **Customer/Units** windows will open the Contract Details window. This will open the **Contract Details** screen. Verify that you have selected the correct customer. Click on the **Activities** tab located on the left side of the screen. Select **Vacate This Unit** from the list of available functions. The Move-Out billing screen will now be opened; from here you can apply additional **Fees, Discounts, or services** to the move-out. We will discuss this screen in detail later in the section.



Move-Out Accept Payment Screen

Select the payment type by clicking on the appropriate payment type check box. The payment amount that was calculated in the billing screen will be automatically entered into the payment screen. If the payment is different than the calculated amount due, enter the **ACTUAL** payment being received into the **Cash Received** field (for cash payments), **Check Amount** (for check payments), or **Amount** field (for credit or debit card payments).

Payment Summary	
Cash:	-\$25.00
Check:	\$0.00
Credit:	\$0.00
Debit:	\$0.00
Total Payment:	-\$25.00
Balance:	\$0.00

Total Amount Due: -\$25.00

Navigation buttons: Previous, Next, Submit

If the payment amount is higher than the amount due on cash payments, an **Over Payment** box will appear allowing you to select how you would like to handle the overpayment; the options are:

Apply as Prepaid; Payments in excess of the amount due, will be applied as a credit balance on the account.

Give Change Back; If the payment amount is in excess of the amount due, the difference will be calculated and displayed in the payment screen.

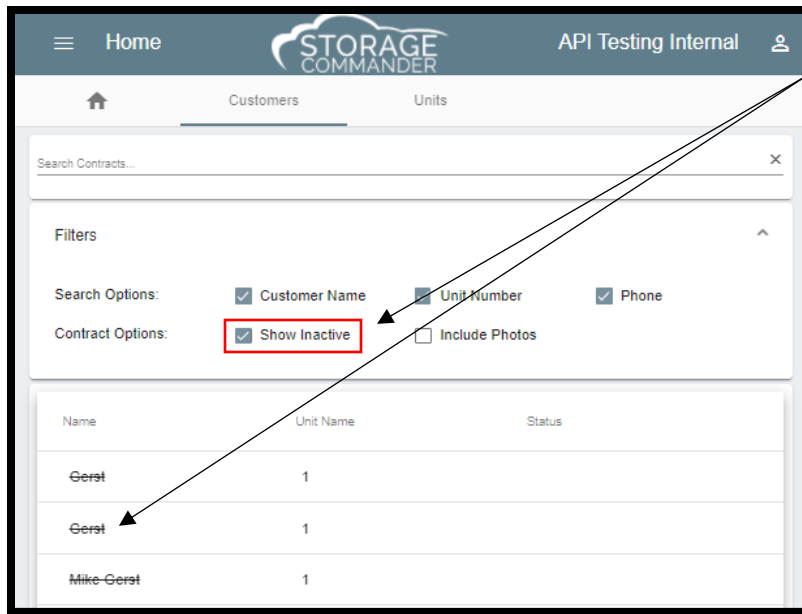
Reversing A Move-Out

The **Reverse Move-Out function** as its name implies allows you to reinstate a customer back into their unit after a move-out has been processed, providing the following conditions are met.

- 1.) The Reverse Move-Out function is run ***prior to*** running **End of Day**.
You cannot initiate a Reverse Move-Out after End of Day has run.
- 2.) The Reverse Move-Out function in and of itself cannot be reversed.

Setting Up a Reverse Move-Out

Click on the Customers / Units tab and click on the Show Inactive check box.



Inactive (moved-out) customers will be displayed in the contracts list with a **horizontal line** through their name.

To initiate the **Reverse Move-Out** process left click on the customer name to open their **Contract Details** screen. Left click on the **Ledger/History** tab and scroll down to the **Move Out** transaction item, position the mouse over the Move Out transaction item and **Right click**, select **Reverse Transaction** a message will appear requesting conformation for the reverse move out. Select **Yes** to complete the reverse move out or **Cancel** to stop the process.

The customer will be returned to the same late status and will maintain the same account balance as they did prior to the move-out. If a payment was made during the move-out process the payment will automatically be reversed and removed from all financial reports, with exception of the **Reversed Transaction** report.

Reservation

Placing a unit on **hold (Reserved)** causes Storage Commander to change the units color on the site map from Green (Vacant) to Purple (Reserved). You can take a reservation **deposit** at the time the unit is reserved which Storage Commander will credit back when the customer moves into the unit. Reserved units are tracked in the **Unit Occupancy Report** but are not classified as rented units. A unit can be removed from a reserved status and all deposits returned to the customer, applied to other units or retained by the facility.

The reservation process is much the same as the move-in process, as the procedures and screens for entering the customer information are almost identical. The only difference between two processes is that setting up a reservation requires you to enter a **“Planned Move-In Date”** rather than a **“Move-In Date”**.

Other differences are that you cannot assign recurring Fees, Discounts, or Services to a reservation.

If you require a reservation deposit you must assign a **Billing Plan** to the reservation that includes a reservation deposit (billing plans are created in the Configuration Manager).

To reserve a unit, click on the **Reservations button** in the activity’s menu, select the unit to be reserved from the list of available units, select the **Customer** tab to open the customer information screen. If no additional information is required, you can skip to the **Billing Detail tab** to enter the Planned Move-In Date.

Starting the Reservation Process

After the unit / RV space has been selected the next step is to enter the **Customer Information**. This consists of the **customers name, address, telephone number and other information** that can be used to contact the customer.

Fill in the customer information fields as required using the Tab key or mouse to move from field to field.

The screenshot shows the 'Reservation' screen in the Storage Commander application. The top navigation bar includes a menu icon, the title 'Reservation', the 'STORAGE COMMANDER' logo, and the text 'API Testing Internal' with a user icon. Below the navigation bar, the header area displays 'Facility: API Testing Internal', 'Customer Name: test', and 'Unit: 1'. A left-hand sidebar contains a list of tabs: 'Select Unit', 'Customer' (highlighted), 'Vehicle Info', 'Alternate Contacts', 'Photos', 'Employer', 'Notes/Comments', 'Merchandise', 'Billing Details', and 'Accept Payment'. The main content area is divided into several sections: 'First Name', 'Middle Name', and 'Last Name' (with 'test' entered); a 'Business' section with a checkbox and 'Business Name' field; a 'Website' field; 'Tax Id', 'Tax Exempt' checkbox, 'Is Military' checkbox, 'Military status' dropdown (set to 'None'), and 'Branch' dropdown; 'Email' field with a calendar icon; 'Driver's License', 'DL State', 'Exp. Date' (1/27/2021), and 'SSN' fields; an 'Addresses' section with a '(Primary)' button, 'Address Line 1', 'Address Line 2', 'City', 'State', 'Postal Code', and 'Country' fields; and a 'Phone Numbers' section with a '(Cell)' button, 'Number', 'Ext.', 'Description', 'Type' dropdown (set to 'Cell'), and a 'Can Receive Text' checkbox. At the bottom of the form are 'Previous', 'Next', and 'Submit' buttons. Annotations with arrows point to the 'Customer' tab, the 'Billing Details' tab, and the 'New...' buttons in the 'Addresses' and 'Phone Numbers' sections.

Customer Tab

Click on the **Billing Detail tab** to enter the Planned Move-In Date.

Click on the **New** buttons to add addresses and phone numbers to the account.

Entering a Planned Move-In Date & Reservation Deposit

From the Billing Detail screen enter the intended move-in date into the **Planned Move-In Date** field.

If a reservation deposit is required, you must select a **Billing Plan** that includes a reservation deposit.

Click on the Billing Detail tab

The screenshot shows the 'Billing Details' tab selected in the left sidebar. The main content area displays a form for unit '1'. The 'Planned Move-In Date' field is set to '1/27/2021'. The 'Billing Plans' dropdown is set to '1st Of Month'. A 'Calculate' button is located next to the date field. The 'Products On Contract' section shows 'Add Product(s)'. The 'Current Transactions' section shows 'Total: \$0.00'. The 'Summary - All Contracts' section shows a breakdown of due amounts: Rent Due: \$0.00, Merchandise: \$0.00, Discounts: \$0.00, Insurance: \$0.00, Fees: \$0.00, Taxes Due: \$0.00, Deposit Due: \$0.00, and Total Due: \$0.00. Annotations with arrows point to the 'Billing Details' tab, the 'Planned Move-In Date' field, and the 'Billing Plans' dropdown.

Enter the Planned Move-In Date.

Select a Billing Plan that includes a reservation deposit

Summary - All Contracts			
Rent Due: \$0.00	Merchandise: \$0.00	Discounts: \$0.00	Insurance: \$0.00
Fees: \$0.00	Taxes Due: \$0.00	Deposit Due: \$0.00	Total Due: \$0.00

Transfer

Customers can be transferred from their current unit to another unit through the **Customer/ Units Tab** by Right clicking on their unit and selecting **Transfer OR Details | Activities | Transfer**. You can also initiate a transfer from the Activities menu.

Click the **Transfer** Button in the Activities Menu to open the Transfer Window.

Search for the customer you are transferring. You have the option to search by unit number, customer name, and customer phone number.

Once the customer has been located in the list, click on the customers name to **Select** the customer. Click **Next** to proceed.

Name	Unit Name	Phone	Status	Moved-In
Steven Smith	2	(951) 672 6257	Current	06/24/2020
Jordan Maldonado	3		Current	07/24/2020
Steven Smith	4	(951) 672 6257	Current	07/02/2020

Select the Unit that you wish to transfer the customer to. Once selected the Unit will become highlighted. Click **Next** to Proceed.

Unit	Status	Size	Floor	Type	Condition	Rate
Unit: 1	Available	5 X 5		Cold Storage	Dirty	\$15.00
Unit: 9	Available	5 X 5		Cold Storage	Dirty	\$15.00

In the **Transfer Options** screen click on the **Calculate** button to generate the total due for this transfer.

The **Current Transactions** section shows the prorated amount for the new unit, and the credit from the previous unit. Click **Finish** to complete the Transfer.

Summary - All Contracts	
Rent Due: -\$17.80	Merchandise: \$0.00
Fees: \$0.00	Taxes Due: \$0.00
Discounts: \$0.00	Deposit Due: \$0.00
Total Due: -\$17.80	

Merchandise

Merchandise items, such as **Boxes, locks, Shipping Tape, Bubble Wrap...** can be inventoried and sold directly through a customer account, or through the Merchandise button in the Activities Menu for non-customers (street sales). When a merchandise item is sold, it is removed from inventory, which will decrease the inventory count for the item sold. Reports within the Storage Commander program will itemize merchandise sales activity and generate re-order reports when inventory items reach a pre-defined re-order level.

Selling Merchandise -Street Sales-

Click on the **Merchandise** button in the tool bar.

Select the item to be sold. Click on the **Add to Cart**, to place the selected item into the Shopping Cart.

Note: *The quantity of an item can be increased or decreased by clicking on the up arrow (to increase) or down arrow (to decrease) located next to the Qty In Cart for the selected item.*

Click **Next** to Proceed to the Accept Payment screen.

From the **Accept Payment** screen select the payment type (*in this example we will use Cash*). Once you check the box the total amount due appears in the **Cash Received** box.

Click **Finish** to complete the transaction and proceed to the print receipt window.

In the **Receipt Window** click **Open** to view the a copy of the receipt. Click **Print** to print a copy of the receipt. Once the documents have finished printing. Click **Close** to exit.

Selling Merchandise –Through a Customer Account

Selling merchandise while in a customer account has the added advantage of recording the merchandise sale in the customers **history**, providing you the ability of reviewing what merchandise items have been purchased by the customer as well as when they were purchased.

Merchandise sales can be included during a rent payment by clicking on the **Merchandise tab** in the Payment window. Select the merchandise items using the same method as described in the “Selling Merchandise Street Sales”. When the merchandise items have been selected, proceed through the **Payment Options** and **Accept Payment**, screens to complete the rent payment and merchandise sale.

Payment window, Merchandise tab. Items in cart: Pad Lock (Price: \$3.00, Stock: 2), Disk Lock (Price: \$7.00, Stock: 2). Merchandise Cost section shows a Pad Lock with a Remove button. SubTotal: \$3.00.

Selling merchandise through a customer account without charging rent

This procedure only applies to customers who are current (account balance is \$0.00)

In the **Payment Options** screen set the **Number of Payments** to 0

Select the Merchandise tab and proceed to add merchandise to the sales transaction as referenced above.

Payment window, Payment Options tab. Customer: Steven Smith. Rate: \$123.21. Products On Contract: 10% Merchandise Discount. Current Transactions: Rental Tax \$11.24, Taxed \$0.00. Summary - All Contracts: Rent Due \$0.00, Merchandise \$0.00, Discounts \$0.00, Insurance \$0.00, Fees \$0.00, Taxes Due \$11.24, Deposit Due \$0.00, Total Due \$11.24.

Adding a Discount to a Merchandise Sale

Once merchandise items have been added to the shopping cart, click on the **Add Products** drop down menu bar and select the appropriate discount item from the list. After a discount has been selected it will be added to the merchandise transaction and displayed in the **Merchandise Cost** section at the bottom of the payment screen.

Only discounts that have been configured as Merchandise Discounts will be displayed in this list.

See Creating Discounts in the Configuration Manager manual for information on creating merchandise discounts.

Account Adjustments

The adjustment function allows changes to be made towards balances on a customer account.

Adjustments can be initiated through the Activities Menu by clicking on the menu at the top left, or by right clicking on a customer's name and selecting **Details | Activities | Adjustment**.

Once an account has been selected the **Adjustment** screen will open. From here you will see a list of all account types that have a current balance (\$0 balances on account items will not be included in the **Past Due Items** list).

Adjustment Types

Adjustments are broken down into two types of adjustments, **Past Due Items** and **Account Adjustments**.

To reduce the balance on past due items, select the item and enter the offset amount into the corresponding field.

To increase a balance to an account item, select the item and enter the amount of adjustment into the Adjustment Amount field.

Contract Info:			
Customer Name:	Myers, Sandy	Next Charge:	03/01/2021
Unit:	7	Rate:	\$15.00
Paid Through:	01/31/2021	Current Balance:	\$15.00

Past Due and Pre-Paid Items:			
<input checked="" type="checkbox"/>	1st Of Month	\$15.00	Adjustment Amount: <input type="text" value="- \$10.00"/>

Account Adjustment:

☒ Rent Account:

☐ Tax

☐ Other

Adjustment Amount:

New Balance: \$5.00

Explanation:

Previous Next Submit

Past Due Items

Past Due adjustments allow the reduction of all or a portion of the balance towards the past due item selected in the list. Adjustments made against past due items are restricted to reducing the balance of the selected item only. You cannot enter an amount that results in the balance changing from a **balance due** to a **credit balance**. In addition, you cannot enter a value that increases the amount due in this section of the adjustment screen. Go to the **Account Adjustment** section if you need to post an adjustment to an account that will increase the amount due

Account Adjustments

The **Account Adjustments** section of the adjustments screen allow global adjustments to be made on **Rent, Tax, Deposit & Insurance balances**. To increase the balance to any of these categories, select the category and enter the amount of the increase in the Adjustment Amount field.

The **New Balance** will automatically update indicating the result of all adjustments.

Enter a required explanation for the adjustment and click on the Finish button to complete the adjustment.

Auction

The Auction cycle is determined by the settings in the **auction late step**, which is setup in the **Configuration Manager** program. Once a customer is qualified for auction their unit will be listed on the **Home** screen under Late or Past Due Contracts with their unit color **ROSE** and including them in the **Auction** button in the Activities menu.

Selecting Customer for Auction

Click on the **Activities Menu** at the top left of the screen and select **Auctions**, to open the **Scheduled Auctions** window. This window will display a list of auctions that are already scheduled.

To add a new customer to the **auction schedule**, click on the **Select Contracts** button at the top right corner of the window. A list of customers that qualify for auction and are not currently scheduled for auction will appear. Select the customer(s) that you will be scheduling for auction, enter the **Auction Date**, add any additional auction **Fee**, and select the auction **Notice**.

When completed click on the **Submit** button to print the Auction Notice.

The screenshot displays the 'Auctions' section of the Storage Commander interface. The top navigation bar includes a menu icon, the title 'Auctions', the 'STORAGE COMMANDER' logo, 'API Testing Internal', and a user profile icon. The main content area is titled 'Scheduled Auctions' and features three filter tabs: 'Auction Date' (selected), 'Unit', and 'Name'. A 'Select Contract' button is located to the right of these tabs. Below the filters is a table of scheduled auctions with columns for ID, Auction Date, Name, Overlocked status, Delinquency, Paid Through date, and a 'Cancel Auction' button. Annotations point to the 'Cancel Auction' button with the text 'To cancel an auction, click on **Cancel Auction**.' and to the 'Select Contract' button with the text 'Click on the **Select Contracts** to select new customers for auction.' and 'To filter by **auction date, unit number or name** click on the corresponding bubble.'

The 'Auction Ready' window is shown in the foreground, featuring a list of customers with their details (Name, Paid Through date, Balance, Status, and Phone). Annotations point to the 'Select customer(s) from list.' and 'Enter Auction Date, additional fee, and select auction notice.' fields. The window also includes a 'Fee' dropdown, an 'Auction Date' dropdown, a 'Notice' dropdown, and buttons for 'Select All', 'Clear All', 'Submit', and 'Cancel'.

ID	Auction Date	Name	Overlocked	Delinquency	Paid Through	Cancel Auction
87	Jan 22, 2021	Silvia Aquirre	Overlocked	Auction	Mar 15, 2020	Cancel Auction
A5	Jan 22, 2021	1234 1234	Overlocked	Auction	Apr 27, 2020	Cancel Auction
151	Jan 22, 2021	ANDREW BERRY	Overlocked	Auction	Mar 17, 2020	Cancel Auction
	Jan 22, 2021		Overlocked	Auction	Mar 17, 2019	Cancel Auction

ID	Name	Paid Through	Balance	Status	Phone
80	MARILYN BEASLEY	Jan 9, 2019	\$3,422.70	Qualify For Auction	(802) 870 2218
178	ELIZABETH BIANCO	Mar 1, 2019	\$4,139.85	Qualify For Auction	(419) 470 8377
34	HATTIE BRODE	Apr 29, 2020	\$560.00	Qualify For Auction	(209) 751 2339

Reprint Auction Notice

Click on the Customer and/or Units tab to open the **Customer Contract Details** window. Click the **Ledger/History** tab and locate the Auction on the transaction list. The options will allow you to print, email or view the **Auction Notice** that was generated.

Cancel a Scheduled Auction

Click on the **Auctions** button in the Activities Menu and select Auctions, to open the **Scheduled Auctions** window. Locate the customer in the list and click on the **Cancel Auction** button.

Walk Through

The interactive **Facility Walkthrough** is intended to give a list of units in one area of the Storage Commander Online program. The advanced functionality built into the **Facility Walkthrough** allows you to view unit information, change condition or status of the unit and even add units notes by clicking on Unit Notes followed by save. This page will also be color coded based off the customer status for easy identification.

To utilize the **Facility Walkthrough** page, click on the Activities Menu at the top left of the page and select **Walkthrough**.

Checking **the box** will allow you to select the customer.

This **Pencil** will allow you to change the Status of the unit.

This **Pencil** will allow you to change the condition of the unit.

This **Pencil** will allow you to change the Overlock Status of the unit.

Click on **Contract Details** to open the customers account information.

Select **Email** to send out a **Notice** to the customer.

Unit	Status	Condition	Overlock Status	Actions
<input type="checkbox"/> A1	Qualify For Auction	Ready	Add Overlock	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A2	Reserved	Ready	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A3	Overlocked	Ready	Add Overlock	Unit Notes... Contract Details...
<input type="checkbox"/> A4	Available	Ready		Unit Notes...
<input type="checkbox"/> A5	Qualify For Auction	Ready	Add Overlock	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A6	Available	Ready		Unit Notes...
<input type="checkbox"/> A7	Reserved	Ready	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A8	Reserved	Ready	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A9	Reserved	Ready	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A10	Reserved	Ready	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> 1	Reserved	Dirty	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> 5	Rented	Ready	Remove Overlock	Unit Notes... Contract Details...
<input type="checkbox"/> 3	Rented	Ready	Not Overlocked	Unit Notes... Contract Details...
<input type="checkbox"/> 4	Deny Gate Access	Ready	Not Overlocked	Unit Notes... Contract Details... Email...

Save Progress Remaining Units: 165 Total Units: 165 Reset Entries Close

Changing the Condition

Once the **Facility Walkthrough** is opened, click on the **Pencil** next to the Condition and select the appropriate condition form the drop down. After the condition has been selected it will automatically update the **Facility Walkthrough**.

Changing the Overlock Status

Once the **Facility Walkthrough** is opened, click on the **Pencil** next to the Overlock Status and select the appropriate status from the drop down. After the status has been selected it will automatically update the **Facility Walkthrough**.

Unit	Status	Condition	Overlock Status	Actions
<input type="checkbox"/> A1	Qualify For Auction	Ready	Add Overlock	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A2	Reserved	Ready	Not Overlocked	Unit Notes... Contract Details... Email...
<input type="checkbox"/> A3	Overlocked	Ready	Add Overlock	Unit Notes... Contract Details...

Save Progress Remaining Units: 165 Total Units: 165 Reset Entries Close

Work Orders

The **Work Orders** function allows the facility to create an order for an authorization of maintenance, repair or **work** to be completed. In addition, **Work Orders** can be created to affect a single unit or on the facility level. Work Orders can be generated through the **Work Orders** tab by navigating to the **Activities Menu** and selecting **Work Orders**.

Creating a **Work Order** is a fluent process, where the tenant contact information can be assigned to the order from the unit details. The **Work Order** can be assigned to an employee or a pre-defined vendor (created in the Configuration Manager). This feature is designed to be able to add **parts and labor** from a fee, discount, or merchandise item. These items can be charged to the tenant account or the vendor.

To utilize the **Work Orders** feature, click on the Activities Menu at the top left of the page and select **Work Orders**.

Work Orders

STORAGE
COMMANDER

API Testing Internal

New





















Filter

×

Active

All

Inactive

Date	Unit	Order Number	Status	Description	Contact	Phone	Target Date	Assign To	Completed By	Total Cost	Vendor	Warranty Type	Warranty Expires	Complete
Dec 1, 2021	9	1	Active	Lorem ipsum dol...	 Mike Gerst	(123) 456 7890	Dec 1, 2021	Jordan Test	Tom Smith	\$0.00	Acme Shipping Supplies			
Dec 1, 2021		5	Active	asdf	 Lname		Dec 1, 2021	Tom Smith		\$62.00				
Dec 11, 2020		10	Active	Optimiz ed Put	 Optimize PutTest6	(123) 456 7890	Dec 1, 2021	Jordan Test		\$0.00	Acme Shipping Supplies			
Jan 14, 2021	3	13	Active	test test test...	 jordan maldonado	(123) 456 7890	Jan 14, 2021	Jordan Test	Jordan Test	\$0.00	Acme Shipping Supplies			
Feb 12, 2021		13	Active	Optimiz ed Post ...	 Optimization PostTest	(123) 456 7890	Feb 11, 2021	Tom Smith		\$0.00	Acme Shipping Supplies			
Feb 12, 2021		14	Active	Optimiz ed Post ...	 Optimization PostTest	(123) 456 7890	Feb 12, 2021	Default Password		\$0.00	Acme Shipping Supplies			
Feb 9, 2021		15	Active	Door fix for un...	 Steve Smith		Feb 9, 2021	Jordan Test		\$0.00				
Feb 11, 2021		16	Active	Test	 Blair2 Power2		Feb 18, 2021	Tom Smith		\$0.00				
Feb 12, 2021		19	Active	Testing Front e...	 Post PostTest	(123) 456 7890	Feb 12, 2021	Jordan Test		\$0.00	Acme Shipping Supplies			
Feb 16, 2021		20	Active	This is a test ...	 Blair NewTest		Feb 16, 2021	Default Password		\$0.00				

Navigating the Work Orders Tab

The **Work Orders Tab** provides a view of all Word Orders and their status, descriptions and completion information.

Reservation section of **Quick View** shows the units that are currently reserved at your facility, their scheduled move in date, the unit number assigned to them, and if the reservation is more than 14 days past the scheduled move in date.

Click **the line item** to open the Work order.

Click **the arrow icon** to open the description of the Work order.

Click **the check box icon** to open the completion page.

Quick Complete

×

Date Completed: 2/24/2021

Employee: Tom Smith

Warranty Expires: 2/24/2021

Warranty Type:

Submit

43 | Page

Generating Documents, Notices & Text Messages

The Generate Documents feature allows you to manually generate documents, notices, and text messages at any time. Documents such as late notice, NSF notice, Rate Change notices and invoices can be easily through this feature, you can also create a custom letter for mass mailing to some or all your active or inactive customers. 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** menu and select **Generate Documents**. This will open the **Generate Documents** window, **select** the customer by locating the customer in the **Contracts** column. Once the customer (or customers) has 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 Document** button and selecting **View** located to the right of the customer's name. To print, or email the notice, **select** the customer by **clicking** on the check box next to the customer's name followed by selecting the appropriate **Print**, or **Email** button.

Customer selection column.

Notice selection column.

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

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

Click on a check box to select a customer.

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

Unit	Customer Name	Balance	Notices
1	Daily Billing 2	\$5.00	<input type="checkbox"/> Late
2	TEST	(\$246.42)	<input type="checkbox"/> Late Notice
3	TEST	\$22.74	<input type="checkbox"/> Lien Notice
4	Daily Billing	\$0.00	<input type="checkbox"/> Commercial Late Notice
5	Blair PaymentTest	(\$45.00)	<input checked="" type="checkbox"/> Pre-Lien Notice
6		(\$120.00)	<input type="checkbox"/> NSF
7	converted convetest	\$0.00	<input type="checkbox"/> Returned Check Notice
8	Multi Test	(\$15.00)	<input type="checkbox"/> Receipt
9	Multi Test	(\$30.00)	<input type="checkbox"/> Smartbox Receipt
10	Daily Test	\$0.00	<input type="checkbox"/> Receipt
11	Jordan Tester	\$65.00	<input type="checkbox"/> Misc

Date	Unit	Business Name	View	Email	Text	
Aug 4, 2021	54	Missy Patel	<input type="button" value="View"/>	<input type="button" value="Email"/>	<input type="button" value="Text"/>	<input type="checkbox"/>
Aug 4, 2021	154	THOMAS SMITH	<input type="button" value="View"/>	<input type="button" value="Email"/>	<input type="button" value="Text"/>	<input type="checkbox"/>

Print Selected

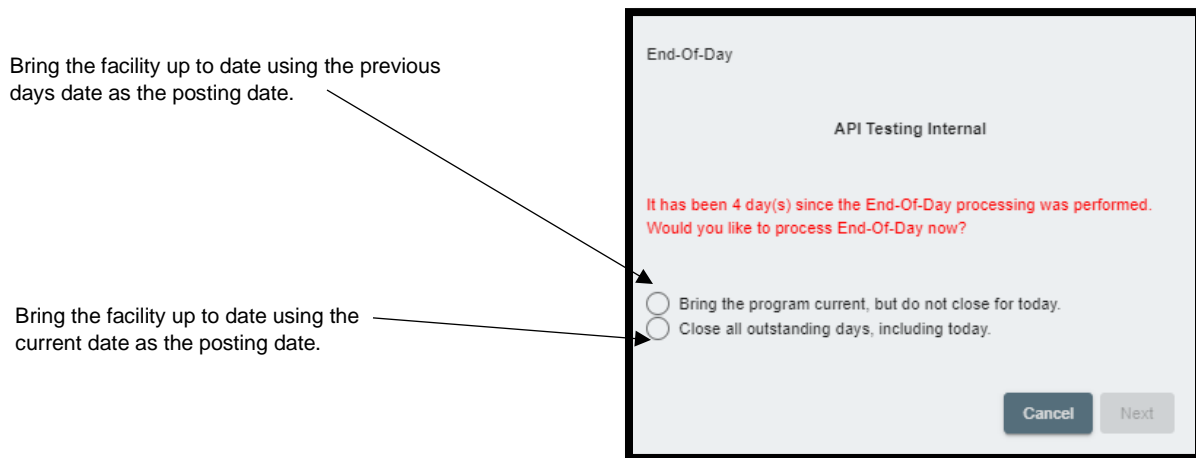
Email Selected

Running End of Day

Running **End of Day (EOD)** initiates many processes within the Storage Commander program, which includes **charging rent, initiating Auto Credit Card & ACH payments, Late Notices, Late Fees, Report Groups**, as well as system level routines.

When starting Storage Commander, the program will automatically detect if the **End of Day** process is up to date. If it detects that the Storage Commander system is not up to date it will display a message box like the example below informing you that the facilities management system is not current and has not been current for the number of days indicated within the message box. If this occurs you will be asked to bring the management system current leaving the current day open (this will allow rent to be charged, late steps/fees to be assessed, auto credit cards to be charged, invoices to be printed/emailed as well as all other end of day functions to be processed as of the day prior to the day this process (**End Of Day**) was initiated.

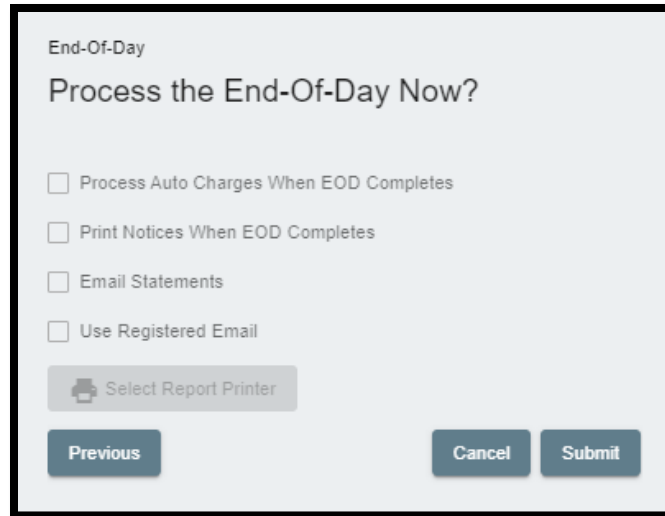
If you select the second option (Close all outstanding days, including today) this will initiate all end of day process with a posting date of the current system date.



Starting End of Day

To start the **End of Day** process, click on the **End of Day** icon in the tool bar. The program will prompt you to select a printer, click on the Select Report Printer button and select a printer from the list of available printers.

When initiating the **End of Day** process, you have the option to include specific functions to run as part of the end of day procedure:



End-Of-Day


Process the End-Of-Day Now?

☐ Process Auto Charges When EOD Completes

☐ Print Notices When EOD Completes

☐ Email Statements

☐ Use Registered Email

 Select Report Printer

Previous Cancel Submit

Process Auto Charges when End of Day completes

Allow Auto Credit Card & ACH charges to occur automatically during the **EOD** process.

Print Generated Notices When End of Day Completes

Print notices (such as late notices) automatically during the **EOD** process.

Email Statements

Email statements (invoices) automatically during the **EOD** process.

Report Printer

When printing documents produced during the **End Of Day** process, you can use the Windows system default printer or you can select from any other printer that has been installed on the computer the is running the **End Of Day** process, even if the printer is a networked printer printing at another location.

To select a printer, click on the **Select Report Printer** button to open the Windows Printer selection window, and select the desired printer from the list.

Reports

All reports are accessed from the Activities Menu by clicking on the **Activities** Menu at the top left and selecting **Administration | Reports**.

Once the Reports function has been selected the reports management window will open. From this window you can open and view reports by selecting the appropriate category and clicking on the associated report. Any number of reports can be opened at one time, when you select a report, a tab will appear at the top of the reports window signifying the report has been opened. Some of the more advanced features include: Ability to generate any report in the system against a facility customer rather than the entire facility. Span reports across multiple facilities. Perform a data search within a report. Export reports to different file formats, such as PDF (.pdf), Excel (.xls), Word (.doc), Text (.txt).

Please Note: The reports will open in an additional tab on your browser and require you to "Allow pop-ups".

Report Groups (created in the Configuration Manager under Accounting / Reports) contain selected reports to be managed under a group name for automatic generation covering a pre-determined date range.

Reports can be generated spanning one or more facilities.

Select the date range to be used in generating the reports. Use Calendar for a custom date range.

Reports can be generated to reflect a single customer by clicking on the **Selected Contact** button and selecting the customer.

The reports will open in a separate tab and be generated in the export format that was selected.

NOTE: If you want to see further reporting information please refer to our [Storage Commander Report Book](#).

Click on the **Add/Remove Favorites** to toggle and add reports to that section.

Click on the **Export** button to export and save the report to a different file format.

Reports are broken down by category. Click on the appropriate category to open a list of reports contained in the category.

API Testing Internal				Facility Summary			
API Testing Internal				Monday, February 15, 2021			
		Daily	MTD	Unit Summary			
Adjustments				Units	Unit %	Area	% of Area
Bad Debt Expense	0.00	-15.00		6	3.6%	895.0	2.1%
Fees Credit	0.00	25.00		1	0.6%	25.0	0.1%
Insurance	0.00	44.95		1	0.6%	50.0	0.1%
Prepaid Insurance	0.00	-44.95		122	73.9%	32,121.0	77.0%
Prepaid Rent	0.00	-230.05		35	21.2%	8,605.0	20.6%
Receivable	0.00	10.00					
Rent	0.00	300.05					
Rent Credit	0.00	50.00					
Total		0.00	140.00	165	100%	41,636.0	100%
Bounced Checks				Per Area			
AdjustInsurance	0.00	-44.95				67.85%	
AdjustRent	0.00	-55.05				0.61	25,411.67
Total		0.00	-100.00			0.00	-45.00
Charges				Variance Below			
Deposits	0.00	75.00				0.00	125.22
Fees	0.00	465.00				0.41	17,240.70
Insurance	0.00	83.70				0.01	-264.50
Other Tax	0.00	1.09				0.41	16,976.20
Rent	0.00	9,288.05					
Rent Discount	0.00	-276.30					
Total		0.00	9,636.54				
Credits Applied				Construction			
Prepaid Insurance	0.00	-6.95		1	0.6%	25.0	0.1%
Prepaid Rent	0.00	-35.00		1	0.6%	25.0	0.1%
Total		0.00	-41.95	162	98.2%	41,621.0	99.8%
				165	100%	41,636.0	100%

Contacting Storage Commander

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

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