

# ***Storage Commander V5***

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## **Configuration Manager Operations Manual**





## Welcome to Storage Commander

Welcome to Storage Commander, the most powerful and easiest-to-use self-storage management software available. Our software was developed exclusively for the self-storage industry, Storage Commander was designed using the latest Windows 32 and 64bit graphical operating system architecture, and incorporates many features not found in any other management program.

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

Proceeding to Section 2, *Using Storage Commander*, 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 exactly 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 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 is configured correctly for your facility.

We're available to help you with any questions that you might have with using Storage Commander. Our software comes with 60 days free technical support that is available from 7:00am to 5:00pm Monday through Friday Pacific Standard Time. We also offer additional support at reasonable rates after the initial 60 days have expired.

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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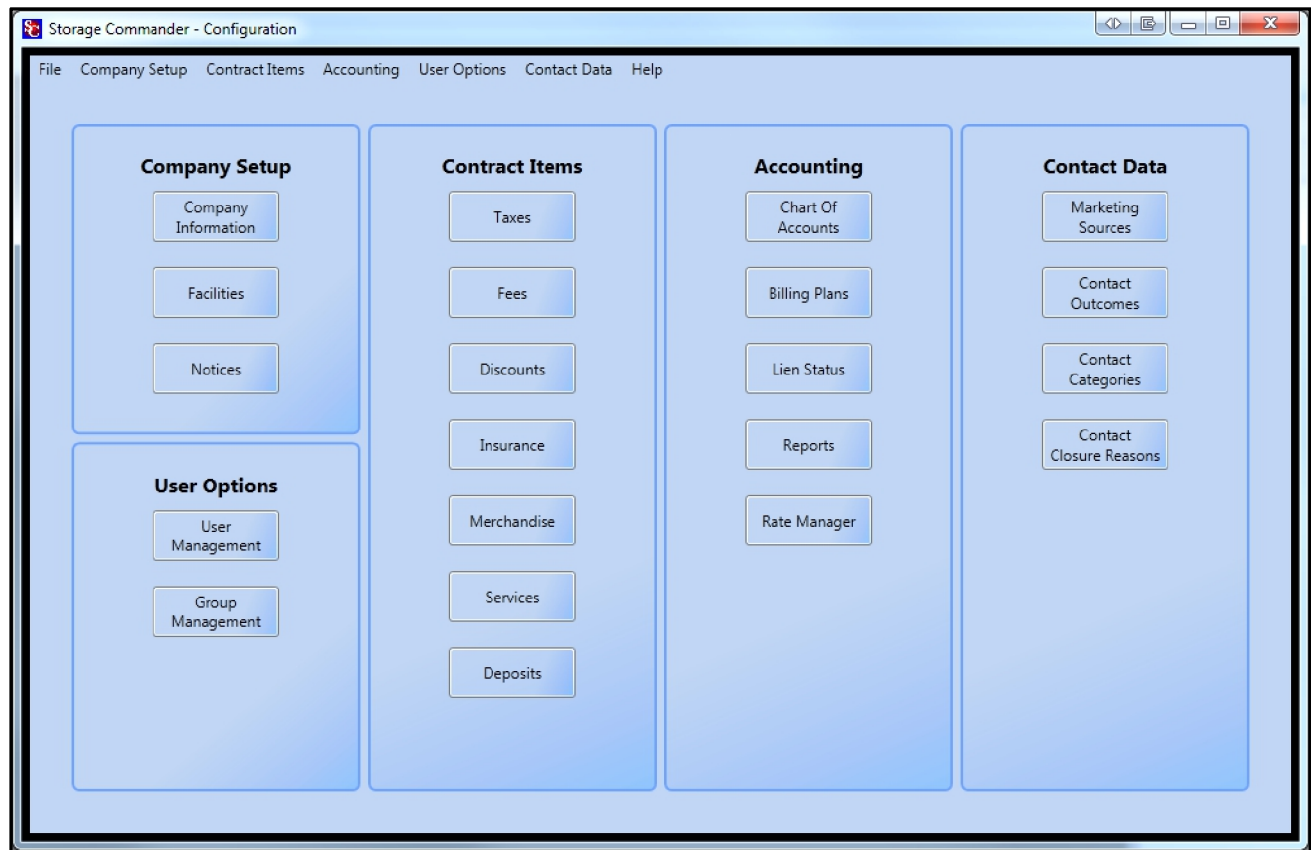
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Configuration Manager is used to setup (configure) Storage Commander V5 to run your self storage business in accordance to your business policies. Late steps, billing plans, customizing notices setting up discounts, assigning manager security levels are just a view of the configuration controls available through this program.

The Configuration Manager is a standalone application, meaning that it can be installed on the same computer that is running Storage Commander V5, or it can be installed and run on a separate computer that is connected to other computers running Storage Commander V5 through the internet..



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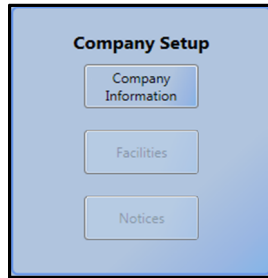
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# Company Setup

## Company Information

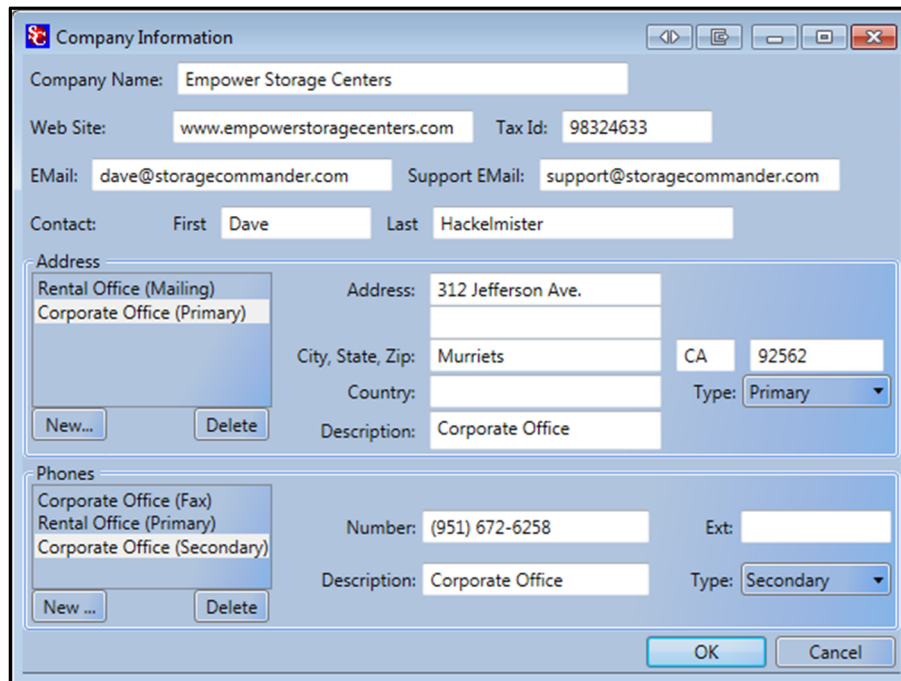


The company setup screen is used to enter address information for the head office location of multi-site operations. The Company Information screen differs from the Facility Information screen in that the information entered in the Company Setup is only available for reports and notices, no facility setup functions are allowed to be implemented or modified through this screen (these setup functions can only be implemented and/or modified through the Facility Setup screen).

The design intent for this function is to allow reports to be generated across multiple facility locations under one or more companies.

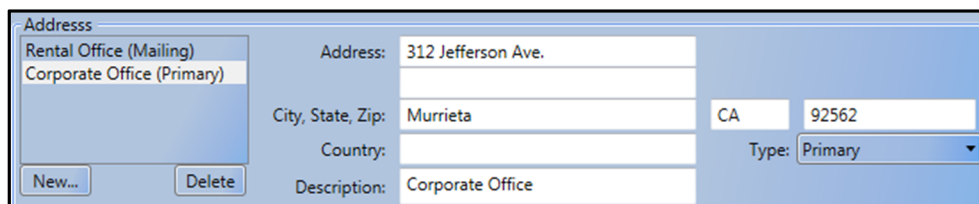
## EDITING COMPANY INFORMATION

To change the information contained in any of these fields, move the mouse cursor into the appropriate field, use the Delete or Backspace keys to remove the data in the field and enter the new/updated information. When you have completed entering the new information, click on the **OK** button (located in the bottom right of the screen) to save and close the screen.

The screenshot shows the "Company Information" dialog box. It has a title bar with standard window controls. The fields include: Company Name (Empower Storage Centers), Web Site (www.empowerstoragecenters.com), Tax Id (98324633), EMail (dave@storagecommander.com), Support EMail (support@storagecommander.com), Contact (First: Dave, Last: Hackelmister). There are two sections for addresses and phones. The "Address" section has a list box with "Rental Office (Mailing)" and "Corporate Office (Primary)". The "Corporate Office (Primary)" is selected. The address fields show: Address (312 Jefferson Ave.), City, State, Zip (Murrieta, CA, 92562), Country (empty), Type (Primary dropdown), and Description (Corporate Office). There are "New..." and "Delete" buttons. The "Phones" section has a list box with "Corporate Office (Fax)", "Rental Office (Primary)", and "Corporate Office (Secondary)". The "Corporate Office (Secondary)" is selected. The phone fields show: Number ((951) 672-6258), Ext (empty), Description (Corporate Office), and Type (Secondary dropdown). There are "New ..." and "Delete" buttons. At the bottom right are "OK" and "Cancel" buttons.

## ADDING A NEW COMPANY ADDRESS

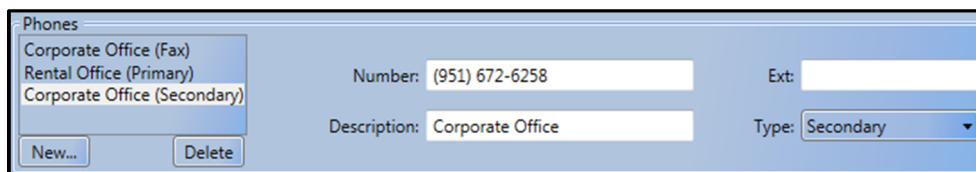
First, click on the **New** button and enter the address information. Next click on the **Type** button and select one of the three address types. You should now see a new address item in the **Address** list box.

This is a close-up of the "Address" section of the dialog box. It shows the list box with "Rental Office (Mailing)" and "Corporate Office (Primary)". The "Corporate Office (Primary)" is selected. The address fields show: Address (312 Jefferson Ave.), City, State, Zip (Murrieta, CA, 92562), Country (empty), Type (Primary dropdown), and Description (Corporate Office). There are "New..." and "Delete" buttons.

**Note:** Only address that are assigned as **Primary** will be included in reports

## ADDING A NEW COMPANY PHONE NUMBER

First, click on the **New** button. Next click on the **Type** button and select one of the seven phone types. You should now see a new phone number item in the **Phones** list box. Now enter the new phone number using the Tab key or mouse to move from one field to another



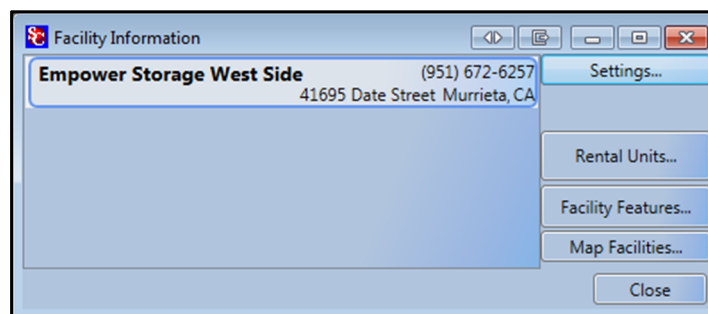
**Note:** Only phone numbers that are assigned as **Primary** will be included in reports

## Facility Setup



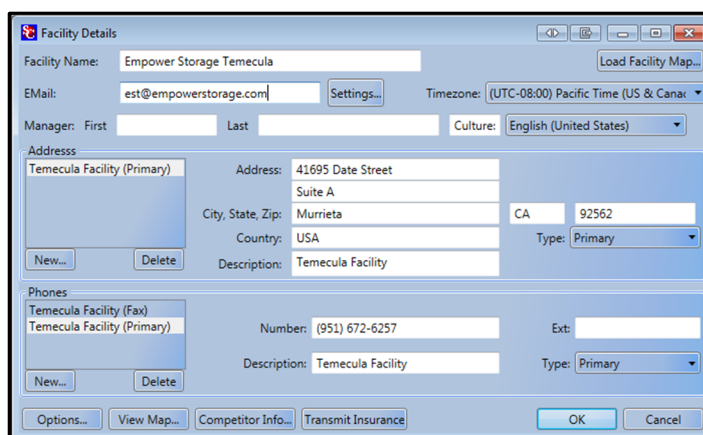
The Facilities section under Company Setup is where operating parameters, facility features and unit configuration are created or edited.

Selecting the Facilities button in the Company Setup box will bring up the Facility Information screen. This screen will show all currently installed facilities.



## SETTINGS BUTTON

Selecting button opens the **Facility Details** window. From here you can edit the facilities address, phone, fax & email. You can also select the facilities time zone (this feature is used by management companies who manage facilities across multiple time zones). You can also change to format of how Currency, Dates & Numbers are displayed within the program by opening the Culture list box and selecting the associated country format for these values.



## EDITING FACILITY INFORMATION

To make changes to a facility address, double click on the facility in the **Facility Information** screen or click the facility (single click) to highlight it and click on the Settings button to open the **Facility Detail** screen.

To change the information contained in any of these fields, move the mouse cursor into the appropriate field, use the Delete or Backspace keys to remove the data in the field and enter the new/updated information. When you have completed entering the new information, click on the Close button (located in the bottom right of the screen) to save and close the screen.

*Changing the facility name does not create a new facility, it merely changes the name of the facility that was selected, as well as the facility name used in all reports and notices.*

*New facilities can only be added by contacting Empower Software Technologies, Inc. and purchasing a new facility module.*

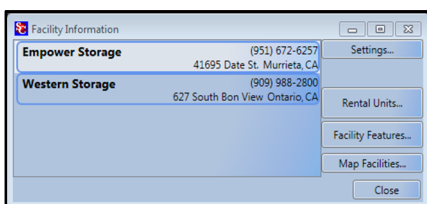
## Setting Facility Options

Facility Options is where the user can specify what options will be available for a specific facility (such as credit card processing, debit card processing, default billing/payment plan, Insurance provider, and a host of other options).

It is important to remember that changes to the options will only affect the facility that was selected when entering this section, which gives you total control over which option will be available at any given facility.



Click on the **Facilities** button in the **Company Setup** box to open the **Facility Information** window. A list of all installed facilities will be displayed.



From the Facilities Information window select the facility you will be setting/modifying operational options for, by clicking on the facility name one time (to highlight the facility) and selecting the **Settings** button, or by double clicking on the facility name. Once the facility has been selected click on the **Options** button.

### Setting Default Billing Plan

To configure Storage Commander to automatically use a pre-configured billing plan during a move-in, click on the down arrow in the **Default Billing Plan** selection bar and select one of the billing plans in the list (see **Billing Plans** referenced later in this manual).

A screenshot of the 'Facility Options' window for 'Empower Storage West Side'. The window contains various settings: 'Default Billing Plan' is set to 'Monthly'; 'Merchant Token' is '54854875465498951354678745615113'; 'Payment Options' include 'Accept Cash', 'Accept Checks', 'Accept Credit Cards', and 'Accept Debit Cards'; 'Banking Account Number' is '12345678-987654321'; 'Prorate Method' is 'Yearly365'; 'Occupancy Goal' is '84'; 'Insurance Goal' is '54'; 'Insurance Contract' is 'Insurance Addendum'; 'Insurance Provider' is 'Ponderosa SafeStor'; 'Payment Receipt' is 'Receipt'; 'NSF Notice' is 'Returned Check Notice'. There is a 'General Options' section with checkboxes for 'Void/Credit credit cards on reversed transactions', 'Round Calculated Amounts', 'Enable Don't Prorate', 'Update PT Date For Partial Payments', 'Use Multi-Unit Statements', 'Update PT When Rent Balance Paid', and 'Automatically Print Notices During End-Of-Day'. There is also a 'No Print Days' section with checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. At the bottom, there is a 'Blue Moon Contract Interface' section with an 'Enable Interface' checkbox and a 'Serial Number' field. A 'Close' button is in the bottom right corner.

### Setting Credit Card Merchant Token

\*Insert the token you received from PayPros into the **Merchant Token** field. Once the token has been entered you must select “**Accept Credit Cards** /**\*\* Accept Debit Cards**” from **Payment Options**, to enable credit cards to be used at the facility.

**Special Note:** \* The Merchant Token field can only be modified by an Administrator who has logged into the system using the fingerprint scanner  
\*\* Debit Cards can only be processed at the site through the Customer Access Terminal

### Setting Payment Options

Storage Commander can be configured to only allow specific types of payments (Cash, Check, Credit / Debit Cards) to be accepted at a facility. Placing a check mark next to the payment type, allows that payment type to be used at the facility.

### Banking Account Number

Once you enter the bank account number, it will be included to the Deposit slip.

### Setting up the Prorating Method

Storage Commander supports three different type of prorated calculation, those being:

- |                       |  |
|-----------------------|--|
| <b>Yearly 365</b>     | Calculates the prorated rent based on a constant 365 day year.<br>The formula used in this method is: <b>monthly rate x 12 ÷ 365 = daily rate</b>  |
| <b>Monthly Actual</b> | Calculates the prorated rent based on the actual number of days in the current month.<br>The formula used in this method is: <b>monthly rate ÷ the number of days in the current month</b> |
| <b>Monthly 30</b>     | Calculates the prorated rent based on a constant 30 day month.<br>The formula used in this method is: <b>monthly rate ÷ 30</b>   |

### Setting Facility Occupancy Goal

The sliding control in the Occupancy Goal section allows you to set occupancy goals based on the following formula:

Percentage of units rented by total number of units (Unavailable units are not included).

To set the occupancy goal, click on the slider control nub and move it to the desired percentage number. This places a marker on the Occupancy Gauge allowing you to see your current occupancy percentage in relation to the actual occupancy of your facility and where you are now.

The Occupancy Goal gage is located in the Storage Commander program under the Charts / Gauges tab.

### Setting Customer Insurance Sales Goal

The sliding control in the Insurance Goal section allows you to set insurance sales goals based on the following formula:

Percentage of insured customers of the total customers in the facility.

To set the insurance goal, click on the slider control nub and move it to the desired percentage number. This places a marker on the Insurance Gauge allowing you to see your current insurance percentage.

The Insurance Goal gage is located in the Storage Commander program under the Charts / Gauges tab.

### Selecting Active Insurance Contract

Insurance contracts are created in the Notices section of the Configuration Manager. To setup a facility to use a specific Insurance contract, click on the down arrow of the Insurance selection bar. From the list of notices that appear, select the insurance contract that will be used at the facility currently being edited/created.

The insurance contract selection will be automatically uploaded to the assigned facility upon leaving the Facility Details window.

### Selecting Insurance Provider

Insurance providers are initially setup in the Contract Items/Insurance section of the Configuration Manager.

To select an insurance provider to be used at the facility you are currently working on, click on the down arrow in the Insurance Provider selection bar, and select the insurance provider from the list.

The insurance provider selection will be automatically uploaded to the assigned facility upon leaving the Facility Details window.

### **Selecting Payment Receipt Templates**

Payment receipt templates are created in the Notices section of the Configuration Manager. To setup a facility to use a specific payment receipt template, click on the down arrow of the Payment Receipt selection bar. From the list of notices that appear, select the receipt template that will be used at the facility currently being edited/created.

The payment receipt template selection will be automatically uploaded to the assigned facility upon leaving the Facility Details window.

### **Selecting Default NSF Notice**

The NSF (**Not Sufficient Funds**) notice is created in the Notices section of the Configuration Manager. To setup a facility to use a specific NSF notice, click on the down arrow of the NSF Notice selection bar. From the list of notices that appear, select the NSF notice that will be used at the facility currently being edited/created.

The selected NSF notice will be automatically uploaded to the assigned facility upon leaving the Facility Details window.

## **GENERAL OPTIONS**

### **Auto Void Credit Card Payments**


Place a check mark in the box adjacent to the selection **Void/Credit credit card on reversed transactions**, to allow Storage Commander to automatically void a credit card charge when a reversed transaction is applied against the credit card payment.

### **Round Calculated Amounts**

Placing a check mark in this option will cause calculated amounts for Prorated Rent, Fees, and Discounts to be rounded up to the nearest dollar. Tax is excluded from this setting.

Note: If you only want tax to be rounded, you must select this option when you are creating a tax fee (see **Creating Tax fees**, discussed later in this manual)

### **Enable Don't Prorate**

This setting only affects billing plans that are configured to charge rent on fixed billing cycles (such as 1<sup>st</sup> of the month), and will only affect the prorated rental charge for the month of the move-in by completely removing the prorated rent that is charged. If selected a Don't Prorate selection item will be available in the Move In / Billing Detail screen (under the  button).

### **Update Paid Through Date On Partial Payments**

When selected, allows the paid through date of a unit to be moved forward based on the value of the partial payment and the proration method currently in effect at the time of the partial payment.

(Proration methods were discussed earlier in this section).


### **Update Paid Through Date When Rent Balance Is Paid**

When selected restricts the paid through date from advancing until the rent balance has been paid. This allows the account to accumulate fee charges without going into a late status providing the rent balance has been satisfied.

### **Setting up Multi Unit Invoices**

Select this option to configure Storage Commander to produce a single invoice (statement) for a customer who has more than one storage unit/RV space. The resulting invoice that is generated will reference all units / spaces that the customer is currently renting, their current balances, next due date and there balance forward.

### **Auto Printing of Late, & Auction Notices**

Selecting the option Automatically Print Notices During End Of Day will automatically print all late notices and auction notices, during the End Of Day processing. Any notices that were printed will also be added to the Documents pull down list located in the tool bar  of the Storage Commander program.

If this option is not selected *all* notices will be sent directly to the Documents list for printing at a later time.

### **No Print Days**

Setting No Print Days will prevent late notices and other automatically generated notices from printing on the days selected. The next time End Of Day is run, and if that day is *not* associated with a no print day status, all notices that were held back will print. Dates associated with the notices will be set to the date they were actually printed. In the case of late notices, the date of the notice will reflect the actual print date, not the date the late notice was set for. This insures that the timing of the notices are consistent with local regulations.

### **Setting Up Texas Blue Moon Contract Interface**

This option is only available to members who have an active subscription with the Texas Self Storage Association TSSA. To activate this feature place a check mark in the Enable Interface and enter the serial number given to you from TSSA.

Once activated move-in contracts will be automatically generated upon completion of the move-in process through Storage Commander.

## **VIEWING GOOGLE SITE MAP**

To view a Google Map of the facility. Go to the **Company Setup** section of the Configuration Manager and click on the Facilities button. Single click on the facility name and click on the **Map Facilities** button to open a Google satellite view of the selected facility. You can also view a map by double clicking on the facility name which will open the address screen for the facility, and click on the **View Map** button located at the bottom of the window

## **SETTING UP COMPETITOR INFORMATION**

To setup and maintain competitor information within the Storage Commander system go to the **Company Setup** section of the Configuration Manager and click on the **Facilities** button to open the **Facility Information** window. From the list of available facilities double click on the facility (or single click on the facility followed by single clicking on the **Settings** button). This will open the **Facilities Details** window. At the bottom of the facilities details window click on the **Competitor Info** button to open the **Competitor Information** window. In the competitor information window you will see a list of active competitors. To add a new competitor, click on the **Add New** button and enter the address, phone, email and manager information. When you have completed entering the address information you can get a quick look at the Google map by clicking on the **View Map** button. Click on the OK button to save the data and return to the competitor information window. From this window you can add information on unit mix (**available unite size and rate**) for the competitors facility.

## **SETUP SAFEStOR INSURANCE ACCOUNT**

To setup SafeStore Tenant Insurance within the Storage Commander system go to the **Company Setup** section of the Configuration Manager and click on the **Facilities** button to open the **Facility Information** window. From the list of available facilities double click on the facility (or single click on the facility followed by single clicking on the **Settings** button). To select the facility that you will be adding insurance to. This will open the **Facilities Details** window. At the bottom of the facilities details window click on the **Transmit Insurance** button, to send the facility information directly to Ponderosa Insurance Agency.

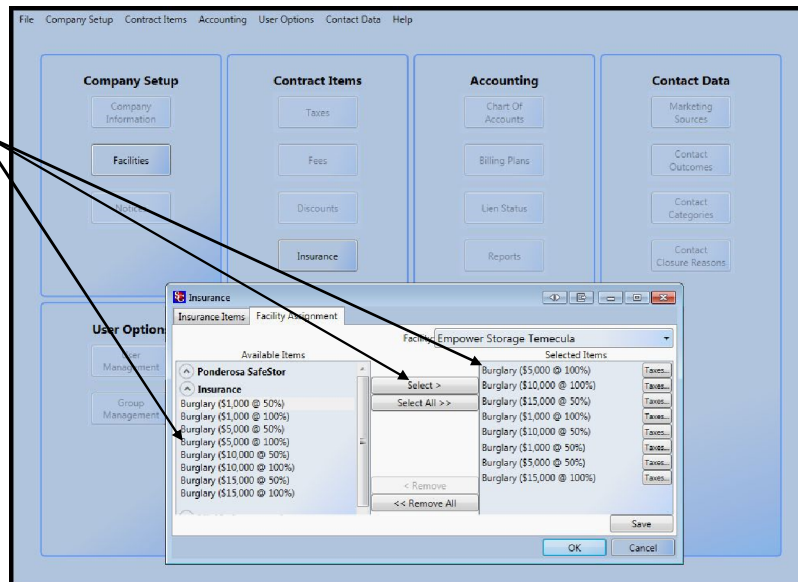
After the facility information has been sent, return to the **Configuration Manager** main screen, and click on **Insurance** button under the **Contract Items** section. All of the available insurance policies for **SafeStor** Tenant Insurance should already be listed. To add new policies or to modify existing policies, select the policy to modify and click on the Settings button. To add a new policy click on the **New** button and enter the policy information.

## Adding Insurance Policies To A Facility

Once all of the policies have been created/verified they will need to be added to the Storage Commander program at the facility.

From the Configuration Manager / Contract Items section click on the **Insurance** button. From the **Insurance** window click on the **Facility Assignment** tab, in the **Facility** selection bar make sure the facility referenced in the bar is the facility you want to add/modify the insurance policy. If it is not the correct facility, click on the down arrow and select the correct facility from the list.

Click on the individual insurance policies to highlight the policy, click on the **Select** button to move the selected items into the **Selected Items** list box. To select multiple items, hold the **Shift** key down while selecting items. To select all items click on the **Select All** button.



## Creating & Editing Units

To add new rental units to your facility, or to change the characteristics of existing units, open the configuration manager and select **Facilities** from the **Company Setup** section. Highlight the facility by *single clicking* on the facility name. Once the facility is highlighted click on the **Rental Units** button to open the

Unit Size	Price
10 X 10	\$80.00
10 X 17	\$80.00
10 X 20	\$80.00
10 X 30	\$100.00
5 X 10	\$65.00
5 X 5	\$45.00
8 X 10	\$75.00
RV	\$25.00

To create a new unit size click on the **New** button

To make changes to an existing unit size, select on the unit size and click on the **Select** button

Rental Units window, rental unit sizes previously created will be displayed in the list box.

### CREATING A UNIT SIZE

Before new units can be created a *unit size* that will be associated with the new unit(s) must be available.

To create a new unit size click on the **New** button located on the lower right side of the **Unit Sizes** window.

Description: 12 X 30	
Default Deposit Amount	\$0.00
Default Fee Amount	\$0.00
Dimensions (Feet)	
Length: 30.00	Height: 0.00
Width: 12.00	Depth: 0.00
Rates	
Monthly: \$175.00	Hourly: \$0.00
Daily: \$0.00	Weekly: \$0.00

Enter a size description in the **Description** field. If you charge a special deposit amount for this unit size enter the amount into the **Default Deposit Amount** field.

You can also specify a special fee that can be charged against customers occupying this unit size. Enter the fee in the **Default Fee Amount** field.

The dimensions of the unit can be entered in various units of measurements by clicking on the down arrow in the unit of measurement button.

The billing rate of the unit can accommodate any or all of the unit rate plans listed in the Rates box.

Click on the OK button to save the settings.

## CREATING NEW UNITS

Click on the **Create Units** tab located at the top of the screen to open the unit creation window. To start creating units enter the **Prefix** character(s) followed by the **Starting Number** of the unit(s), the **Ending Number**, and the **Suffix** character(s). Entering a number in the **Leading Zeros** box will automatically format the unit numbers so that the total number of digits in the unit numbers will remain constant. (in the example above 2 digits were selected, as you can see in the **Preview** and in the **Units Under Construction** list box, a minimum of 2 digits were created for each unit number, with the first 9 unit numbers padded with a zero to maintain a minimum 2 digit configuration. The Preview window will display a sample of the starting number and ending number so that you can verify the number of units that will be created as well as the

format of the unit numbers. Click on the **Create Units** button to create the units and display them in the **Units Under Construction** box.

**Note:** Units under construction that will not be available until a unit size has been assigned to them.

The next step is to assign a size to the newly created units. To do this highlight the units in the Units Under Construction box that are to be assign to a certain size, with the units highlighted click on the corresponding unit size under the Sizes box. Now select the unit type from the pull down Type list box, you can also assign a floor and building to associate the units to (unit Type, Floor & Building will be displayed in the Customer/Units screen of the Storage Commander V5 program). Repeat this process for all of the units in the Units Under Construction box.

## Facility Features

To open a facility, place the mouse over the facility name and double click using the left mouse button.

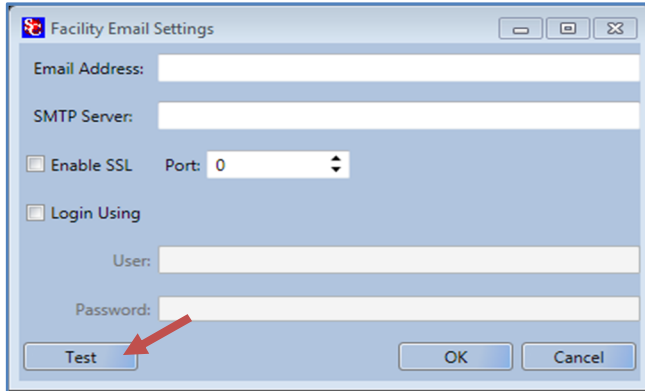
The Facility Details window will open. From this window you will be able to change any of the facility options that are currently available.

## LOADING THE FACILITIES GRAPHICAL SITE MAP

To load a graphical site map for use within the Storage Commander V5, click on the Load Facility Map button located in the upper right side of the Facility Details window. This will open a Windows Explorer window that you will use to navigate to the location where the site map is stored. When the site map has been located, click on the site map one time with the right mouse button to highlight the file, click on the Open button to load the map into the Storage Commander V5 program.

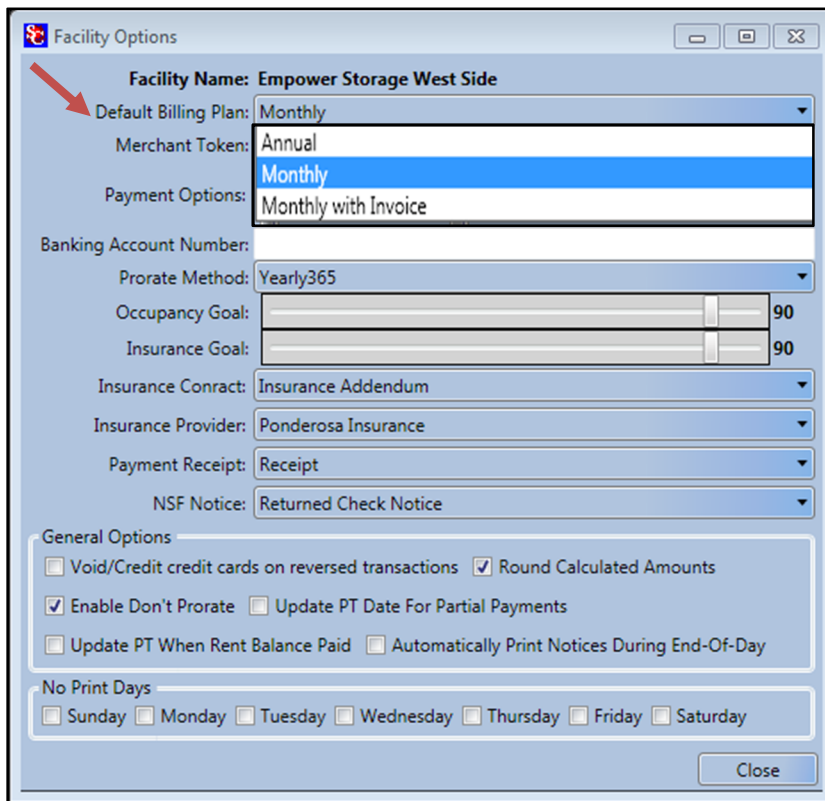
## SETTING UP EMAIL

To send notices, receipts, reports and other documents using your email account, you must first configure the email option. This is accomplished by clicking on the Settings button located next to the email address field in the Facility Detail window.

The image shows a 'Facility Email Settings' dialog box. It contains fields for 'Email Address', 'SMTP Server', 'Port' (set to 0), 'Enable SSL' (unchecked), 'Login Using' (unchecked), 'User', and 'Password'. A red arrow points to the 'Test' button at the bottom left. 'OK' and 'Cancel' buttons are at the bottom right.

Fill in the required fields based on your email providers requirements and click on the **TEST** button to verify if all fields have been filled in correctly.

## SELECTING DEFAULT BILLING PLAN

The image shows a 'Facility Options' dialog box for 'Empower Storage West Side'. A red arrow points to the 'Default Billing Plan' dropdown menu, which is currently set to 'Monthly'. The dropdown list is open, showing 'Annual', 'Monthly' (highlighted), and 'Monthly with Invoice'. Other fields include 'Merchant Token', 'Payment Options', 'Banking Account Number', 'Prorate Method' (set to 'Yearly365'), 'Occupancy Goal' (90), 'Insurance Goal' (90), 'Insurance Contract' (Insurance Addendum), 'Insurance Provider' (Ponderosa Insurance), 'Payment Receipt' (Receipt), and 'NSF Notice' (Returned Check Notice). There are sections for 'General Options' with checkboxes for 'Void/Credit credit cards on reversed transactions', 'Round Calculated Amounts', 'Enable Don't Prorate', 'Update PT Date For Partial Payments', 'Update PT When Rent Balance Paid', and 'Automatically Print Notices During End-Of-Day'. A 'No Print Days' section has checkboxes for 'Sunday' through 'Saturday'. A 'Close' button is at the bottom right.

To select a Default Billing Plan click on the Options button in the Facility Detail window to open the Facility Options window, locate the Default Billing Plan field, click on the down arrow located at the end of the default billing plan field and select the billing plan from the drop down list. This will become the billing plan that is automatically selected for all future move in's. Keep in mind that although this billing plan will be automatically selected during a move in, it can be replaced by another billing plan during the move in operation. Creating new billing plans will be discussed in the section Accounting – Billing plans of this manual.

## CREDIT CARD / DEBIT CARD SETUP

Facility Options

Facility Name: Empower Storage West Side

Default Billing Plan: [Dropdown]

PPI Token: [Text]

Payment Options:

- ☒ Accept Cash
- ☒ Accept Checks
- ☒ Enable ACH
- ☒ Accept Credit Cards
- ☒ Accept Debit Cards

Checking Account: [Text]

Prorate Method: Yearly365 [Dropdown]

Occupancy Goal: [Slider] 90

Insurance Goal: [Slider] 90

Insurance Contract: Insurance Addendum [Dropdown]

Insurance Provider: SafeStor / Ponderosa Insurance [Dropdown]

Payment Receipt: Receipt [Dropdown]

NSF Notice: Returned Check Notice [Dropdown]

General Options

- ☐ Void/Credit credit cards on reversed transactions
- ☒ Round Calculated Amounts
- ☐ Enable Don't Prorate
- ☐ Update PT Date For Partial Payments
- ☐ Update PT When Rent Balance Paid
- ☐ Automatically Print Notices During End-Of-Day

No Print Days

- ☐ Sunday
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

Close

All that is required to setup the credit and/or debit card feature in Storage Commander V5 is to enter the token that is supplied by your credit/debit card processor.

**NOTE:** The same token number is used for Credit Card, Debit Card & ACH Check debiting.

## ALLOWABLE PAYMENT TYPES

Facility Options

Facility Name: Empower Storage West Side

Default Billing Plan: [Dropdown]

PPI Token: [Text]

Payment Options:

- ☒ Accept Cash
- ☒ Accept Checks
- ☒ Enable ACH
- ☒ Accept Credit Cards
- ☒ Accept Debit Cards

Checking Account: [Text]

Prorate Method: Yearly365 [Dropdown]

Occupancy Goal: [Slider] 90

Insurance Goal: [Slider] 90

Insurance Contract: Insurance Addendum [Dropdown]

Insurance Provider: SafeStor / Ponderosa Insurance [Dropdown]

Payment Receipt: Receipt [Dropdown]

NSF Notice: Returned Check Notice [Dropdown]

General Options

- ☐ Void/Credit credit cards on reversed transactions
- ☒ Round Calculated Amounts
- ☐ Enable Don't Prorate
- ☐ Update PT Date For Partial Payments
- ☐ Update PT When Rent Balance Paid
- ☐ Automatically Print Notices During End-Of-Day

No Print Days

- ☐ Sunday
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

Close

Storage Commander V5 can be configured to allow only certain payment types (cash, check, credit...) for payment. To setup payment types, click on the box corresponding to the payment type you will allow at this facility.

## BANKING ACCOUNT NUMBER (ACH)

Facility Options

Facility Name: Empower Storage West Side

Default Billing Plan: [Dropdown]

PPI Token: [Text]

Payment Options: ☒ Accept Cash ☒ Accept Checks ☒ Enable ACH  
☒ Accept Credit Cards ☒ Accept Debit Cards

Checking Account: [Text]

Prorate Method: Yearly365

Occupancy Goal: [Slider] 90

Insurance Goal: [Slider] 90

Insurance Contract: Insurance Addendum

Insurance Provider: SafeStor / Ponderosa Insurance

Payment Receipt: Receipt

NSF Notice: Returned Check Notice

General Options

☐ Void/Credit credit cards on reversed transactions ☒ Round Calculated Amounts

☐ Enable Don't Prorate ☐ Update PT Date For Partial Payments

☐ Update PT When Rent Balance Paid ☐ Automatically Print Notices During End-Of-Day

No Print Days

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Close

Configuring Storage Commander V5 with the banking account number used for the facility (if more than one facility is installed, you can use the same bank account for all facilities or use a unique bank account for each facility). The account number that is entered into this field will be included in the deposit slip.

Enter the facility / company bank account number into the Banking Account field to activate this feature.

## PRORATING SETUP

Storage Commander V5 allows you to select the type of prorate calculation that will be used for Move-In, Move-Out and partial payments. Clicking on the down arrow in the Prorate Method field of the Facility Options window, will open a drop down menu listing the types of prorate calculators available. The prorate calculators used in Storage Commander V5 are:

Facility Options

Facility Name: Empower Storage West Side

Default Billing Plan: [Dropdown]

PPI Token: [Text]

Payment Options: ☒ Accept Cash ☒ Accept Checks ☒ Enable ACH  
☒ Accept Credit Cards ☒ Accept Debit Cards

Checking Account: [Text]

Prorate Method: Yearly365

Occupancy Goal: [Slider] 90

Insurance Goal: [Slider] 90

Insurance Contract: Insurance Addendum

Insurance Provider: SafeStor / Ponderosa Insurance

Payment Receipt: Receipt

NSF Notice: Returned Check Notice

General Options

☐ Void/Credit credit cards on reversed transactions ☒ Round Calculated Amounts

☐ Enable Don't Prorate ☐ Update PT Date For Partial Payments

☐ Update PT When Rent Balance Paid ☐ Automatically Print Notices During End-Of-Day

No Print Days

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Close

- **Yearly-365:** Calculates prorate based on a 365 day year  
(Formula:  $\text{Rate} \times 12 \div 365 = \text{daily rate}$ )
- **Monthly-Actual:** Calculates prorate based on the actual number of days in the current month.  
(Formula:  $\text{Rate} \div \text{number of days in month} = \text{daily rate}$ )
- **Monthly-28:** Calculates prorate based on a constant 28 day cycle  
(Formula:  $\text{Rate} \div 28 = \text{daily rate}$ )
- **Monthly-30:** Calculates prorate based on a constant 30 day cycle  
(Formula:  $\text{Rate} \div 30 = \text{daily rate}$ )

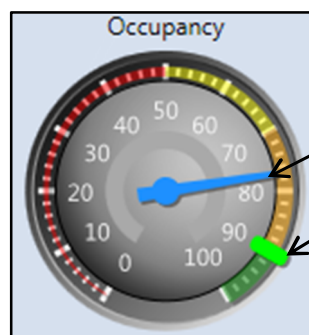
## ESTABLISHING OCCUPANCY & INSURANCE GOALS

The Storage Commander V5 system allows you to set performance targets for both Occupancy and Insurance, two sources that generate substantial revenue in your facility. The graphic displays representing these and other performance indicators are located in the Storage Commander V5 Site Management program under the tab labeled “Charts / Graphics”.



Target percentage

Actual percentage



Actual percentage

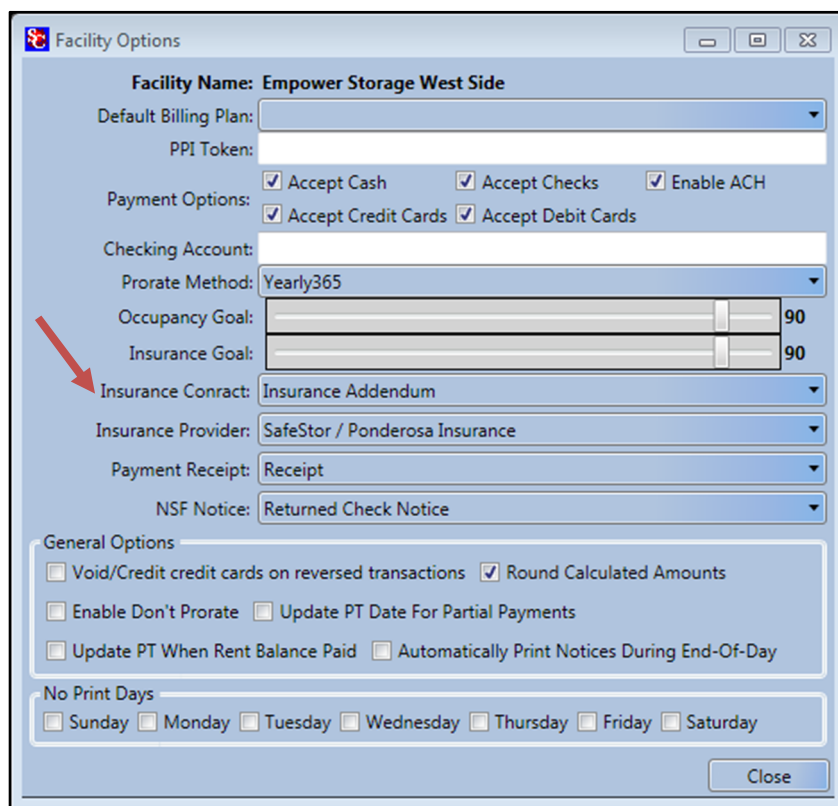
Target percentage

The Occupancy and Insurance goals can be set by moving the slider of the appropriate revenue source.

A screenshot of the "Facility Options" dialog box for "Empower Storage West Side". It contains various settings for billing, payment, and insurance. The "Occupancy Goal" and "Insurance Goal" are set to 90, with sliders next to them. A red arrow points to the "Occupancy Goal" slider. The "General Options" section includes checkboxes for "Void/Credit credit cards on reversed transactions", "Round Calculated Amounts", "Enable Don't Prorate", "Update PT Date For Partial Payments", "Update PT When Rent Balance Paid", and "Automatically Print Notices During End-Of-Day". The "No Print Days" section includes checkboxes for "Sunday", "Monday", "Tuesday", "Wednesday", "Thursday", "Friday", and "Saturday".

As the slider is moved to the right (Increase target goal percentage), or to the left (decrease target goal percentage) the corresponding gauge target indicator will be repositioned to the new value.

## INSURANCE CONTRACT / ADDENDUM



The screenshot shows the 'Facility Options' window for 'Empower Storage West Side'. The 'Insurance Contract' field is highlighted with a red arrow. The window includes various settings for billing, payment, and insurance.

**Facility Name:** Empower Storage West Side

**Default Billing Plan:** [Dropdown]

**PPI Token:** [Text Field]

**Payment Options:** ☒ Accept Cash ☒ Accept Checks ☒ Enable ACH  
☒ Accept Credit Cards ☒ Accept Debit Cards

**Checking Account:** [Text Field]

**Prorate Method:** Yearly365 [Dropdown]

**Occupancy Goal:** [Slider] 90

**Insurance Goal:** [Slider] 90

**Insurance Contract:** Insurance Addendum [Dropdown]

**Insurance Provider:** SafeStor / Ponderosa Insurance [Dropdown]

**Payment Receipt:** Receipt [Dropdown]

**NSF Notice:** Returned Check Notice [Dropdown]

**General Options**

☐ Void/Credit credit cards on reversed transactions ☒ Round Calculated Amounts

☐ Enable Don't Prorate ☐ Update PT Date For Partial Payments

☐ Update PT When Rent Balance Paid ☐ Automatically Print Notices During End-Of-Day

**No Print Days**

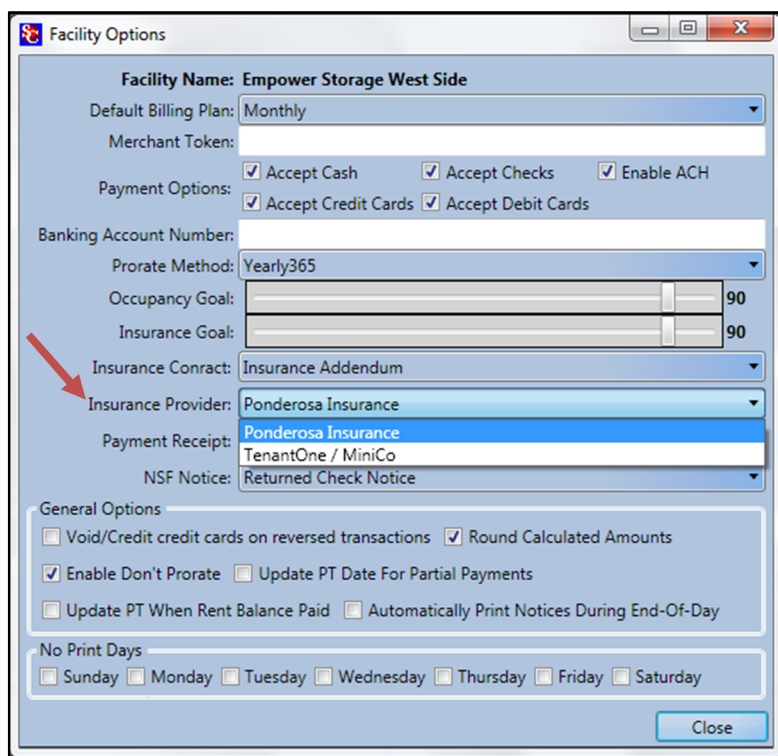
☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

**Close**

The Insurance Addendum provides you with a document that the storage customer signs indicating (1) the amount of insurance coverage they have elected to purchase for the property that they will be storing (2) If they have elected to use their homeowners insurance or (3) have elected to not provide insurance coverage for their property. To select a insurance addendum, click on the down arrow located at the extreme right of the Insurance Contract field. From the pull down menu select the document “Insurance Addendum”, once selected this will be the document that is printed (if you have purchased the Customer Access Terminal, this document will be displayed on the terminal and can be filled in by the customer through this device).

## SELECTING INSURANCE PROVIDER

Click on the down arrow located on the extreme right side of the Insurance Provider field. From the pull down menu select the insurance provider that will be used at this facility (if multiple facilities are installed you will need to select the insurance provider for each facility separately).



The screenshot shows the 'Facility Options' window for 'Empower Storage West Side'. The 'Insurance Provider' dropdown menu is open, showing 'Ponderosa Insurance' and 'TenantOne / MiniCo' as options. A red arrow points to the dropdown arrow on the 'Insurance Provider' field.

**Facility Name:** Empower Storage West Side

**Default Billing Plan:** Monthly [Dropdown]

**Merchant Token:** [Text Field]

**Payment Options:** ☒ Accept Cash ☒ Accept Checks ☒ Enable ACH  
☒ Accept Credit Cards ☒ Accept Debit Cards

**Banking Account Number:** [Text Field]

**Prorate Method:** Yearly365 [Dropdown]

**Occupancy Goal:** [Slider] 90

**Insurance Goal:** [Slider] 90

**Insurance Contract:** Insurance Addendum [Dropdown]

**Insurance Provider:** Ponderosa Insurance [Dropdown]

**Payment Receipt:** [Dropdown]

**NSF Notice:** Returned Check Notice [Dropdown]

**General Options**

☐ Void/Credit credit cards on reversed transactions ☒ Round Calculated Amounts

☒ Enable Don't Prorate ☐ Update PT Date For Partial Payments

☐ Update PT When Rent Balance Paid ☐ Automatically Print Notices During End-Of-Day

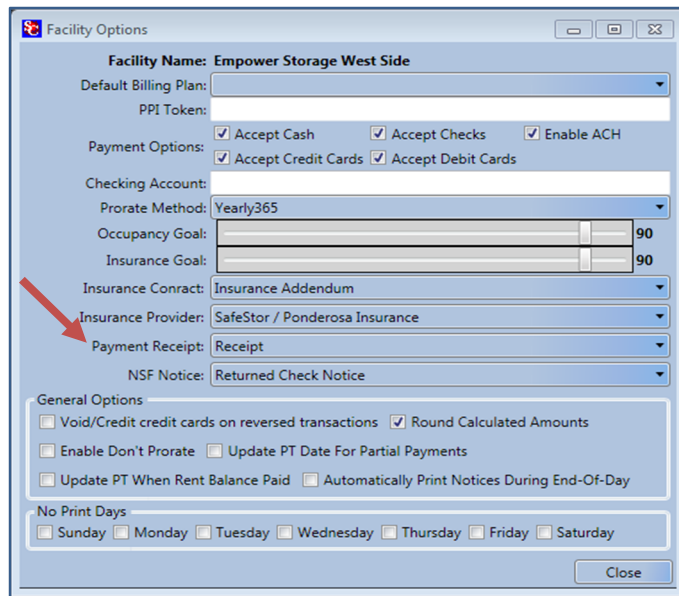
**No Print Days**

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

**Close**

To setup and assign insurance providers to a facility, go to the **Contract Items / Insurance** section in the Configuration Manager

## SELECTING PAYMENT RECEIPT



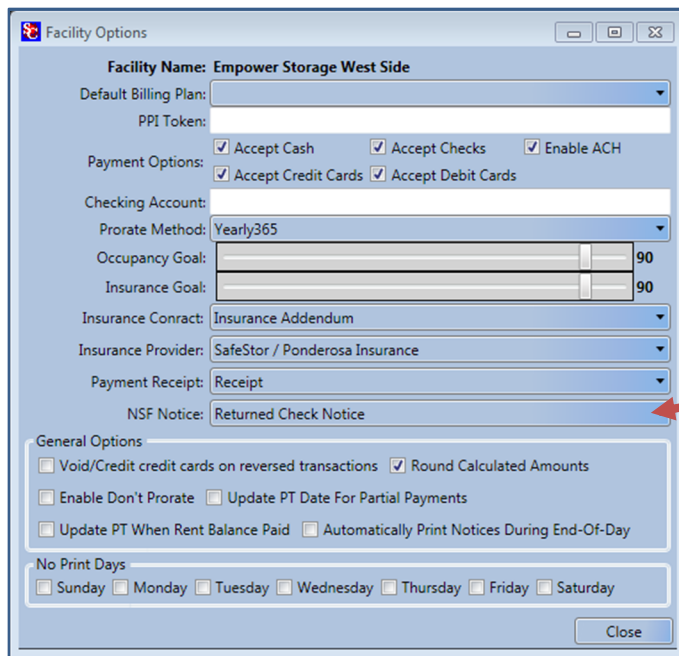
The screenshot shows the 'Facility Options' dialog box for 'Empower Storage West Side'. The 'Payment Receipt' field is highlighted with a red arrow. The field is currently set to 'Receipt'. Other fields include 'Default Billing Plan', 'PPI Token', 'Payment Options' (Accept Cash, Accept Checks, Enable ACH, Accept Credit Cards, Accept Debit Cards), 'Checking Account', 'Prorate Method' (Yearly365), 'Occupancy Goal' (90), 'Insurance Goal' (90), 'Insurance Contract' (Insurance Addendum), 'Insurance Provider' (SafeStor / Ponderosa Insurance), and 'NSF Notice' (Returned Check Notice). The 'General Options' section includes checkboxes for 'Void/Credit credit cards on reversed transactions', 'Round Calculated Amounts', 'Enable Don't Prorate', 'Update PT Date For Partial Payments', 'Update PT When Rent Balance Paid', and 'Automatically Print Notices During End-Of-Day'. The 'No Print Days' section includes checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. A 'Close' button is at the bottom right.

To select a payment receipt, click on the down arrow located at the extreme right of the Payment Receipt field. From the pull down menu select the document “Payment Receipt”, once selected this will be the receipt that is printed for all payment transactions.

*Note. You can customize the payment receipt by opening the receipt document under Company Setup / Notices.*

## SELECTING THE NSF NOTICE

To select a NSF notice , click on the down arrow located at the extreme right of the NSF Notice field.



The screenshot shows the 'Facility Options' dialog box for 'Empower Storage West Side'. The 'NSF Notice' field is highlighted with a red arrow. The field is currently set to 'Returned Check Notice'. Other fields include 'Default Billing Plan', 'PPI Token', 'Payment Options' (Accept Cash, Accept Checks, Enable ACH, Accept Credit Cards, Accept Debit Cards), 'Checking Account', 'Prorate Method' (Yearly365), 'Occupancy Goal' (90), 'Insurance Goal' (90), 'Insurance Contract' (Insurance Addendum), 'Insurance Provider' (SafeStor / Ponderosa Insurance), and 'Payment Receipt' (Receipt). The 'General Options' section includes checkboxes for 'Void/Credit credit cards on reversed transactions', 'Round Calculated Amounts', 'Enable Don't Prorate', 'Update PT Date For Partial Payments', 'Update PT When Rent Balance Paid', and 'Automatically Print Notices During End-Of-Day'. The 'No Print Days' section includes checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. A 'Close' button is at the bottom right.

From the pull down menu select the document “Returned Check Notice”, once selected this will be the document that is printed for all returned check transactions.

*Note. You can customize the Returned Check Notice by opening the document under Company Setup / Notices*

## GENERAL OPERATIONS

Through the general operations settings you will define how Storage Commander V5 handles a variety of operational tasks that you use to run your facility(s). Detailed below are the tasks that we have assigned to **General Options**. Placing a check mark in the associated box will activate the option for use at your facility. Options that have been selected will be used across all facilities.

**Facility Options**

Facility Name: Empower Storage West Side

Default Billing Plan: [Dropdown]

PPI Token: [Text]

Payment Options: ☒ Accept Cash ☒ Accept Checks ☒ Enable ACH  
☒ Accept Credit Cards ☒ Accept Debit Cards

Checking Account: [Text]

Prorate Method: Yearly365 [Dropdown]

Occupancy Goal: [Slider] 90

Insurance Goal: [Slider] 90

Insurance Contract: Insurance Addendum [Dropdown]

Insurance Provider: SafeStor / Ponderosa Insurance [Dropdown]

Payment Receipt: Receipt [Dropdown]

NSF Notice: Returned Check Notice [Dropdown]

**General Options**

☐ Void/Credit credit cards on reversed transactions ☒ Round Calculated Amounts

☐ Enable Don't Prorate ☐ Update PT Date For Partial Payments

☐ Update PT When Rent Balance Paid ☐ Automatically Print Notices During End-Of-Day

No Print Days

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Close

- **Void /credit cards**

- **on reversed transactions**

When selected, posts a void credit card transaction back to the credit card processor when the payment is reversed.

- **Round Calculated Amounts**

When selected this function will cause all calculations that affect an amount due to the customer to be rounded to a whole dollar (\$1.50 would be rounded up to \$2.00, \$1.49 would be rounded down to \$1.00)

- **Enable Don't Prorate**

This option will only work with a billing plan that is set to Prorate (refer to section "Accounting / Billing Plans" of this manual).

When this option is selected, all billing plans that are set to prorate will not charge a customer the prorated value of the rent for the move-in month.

- **Update PT Date For Partial Payments**

Placing a check mark in the box for this option will cause the customers paid through date to be moved up X days based on the value of the payment divided by the prorate value (see the section "Prorate Setup" to determine the prorating formula selected for this facility)

- **Update PT Date When Rent Balance Paid**

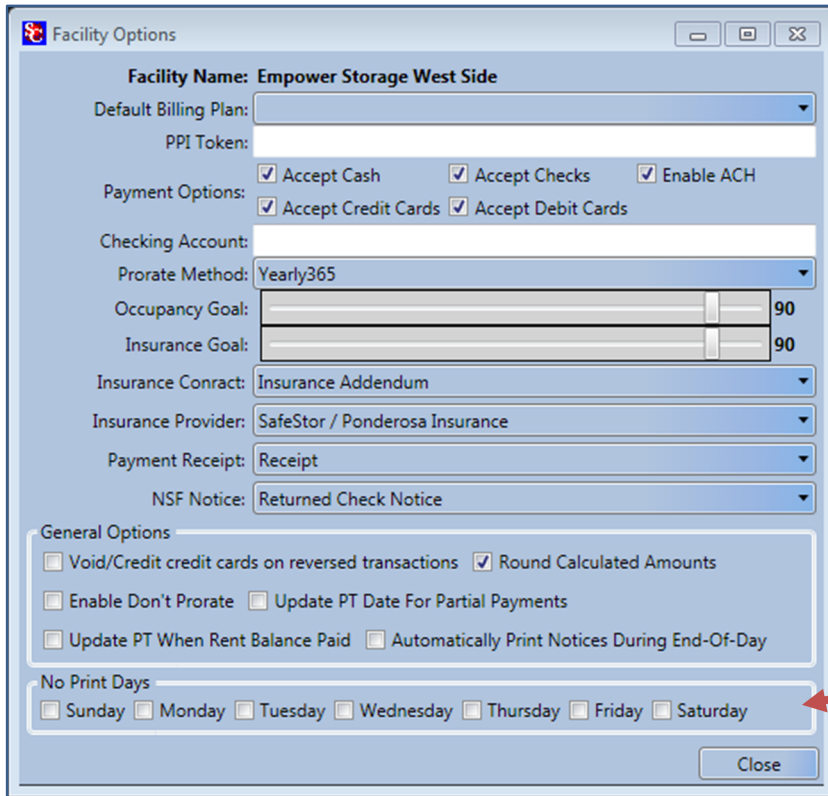
Placing a check mark in the box for this option will cause the customers paid through date to be moved up when the rent balance is paid, regardless of any fees or other balances that may be owed.

- **Automatically Print Notices During End-Of-Day**

Selecting this option enable Storage Commander V5 to automatically print scheduled notices (such as; Late notices and invoices) during the end of day process. If this option is not selected all notices scheduled to print during the end of day process will be held in the Documents queue and can be selectively printed at a later time. The document queue is located in the tool bar of the Storage Commander V5 program.

## No Print Days

Selecting this option allows you to determine what days of the week you do not want to have notices printed. Any notice that would normally print on a day you have selected as a no print day, will be automatically reassigned to print on the next available day.



Facility Options

Facility Name: Empower Storage West Side

Default Billing Plan: [Dropdown]

PPI Token: [Text]

Payment Options: ☒ Accept Cash ☒ Accept Checks ☒ Enable ACH  
☒ Accept Credit Cards ☒ Accept Debit Cards

Checking Account: [Text]

Prorate Method: Yearly365 [Dropdown]

Occupancy Goal: [Slider] 90

Insurance Goal: [Slider] 90

Insurance Contract: Insurance Addendum [Dropdown]

Insurance Provider: SafeStor / Ponderosa Insurance [Dropdown]

Payment Receipt: Receipt [Dropdown]

NSF Notice: Returned Check Notice [Dropdown]

General Options

☐ Void/Credit credit cards on reversed transactions ☒ Round Calculated Amounts

☐ Enable Don't Prorate ☐ Update PT Date For Partial Payments

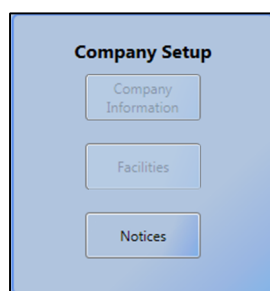
☐ Update PT When Rent Balance Paid ☐ Automatically Print Notices During End-Of-Day

No Print Days

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Close

## Notices



All of the notices used in Storage Commander V5 can be found in this section. To view or edit any of the notices, click on the Notices button located in the Company Setup box. This will open the notices edit window where you can view a notice or if necessary edit or create a new notice or letter.

For the sake of definition any printed material (with the exception of reports) can be created or edit using this feature. If you look at the Notices panel you can get an idea of the verity of documents that can be created or edited.



## DOCUMENT EDITOR

Locate the document in the Notices panel (in the illustration above the Late Notice has been selected). This will open the Late Notice in the editing window, from here you can add or delete text, change text attributes (**bold**, *Italicize* or Underline), change type face, change point size. You can also add pictures such as logos to the document, change paragraph spacing, and set tab stops.

Merge fields can also be inserted into the document or removed from the document. Merge fields allow automatic insertion of specific information contained in the Storage Commander V5 database in to the document. This allows you to develop document templates that contain standardized text (such as late notices or welcome letters and use merge fields to alter the template with specific customer information, print and save a copy of the document to the customer account and return the “master” template for use with another customer.

### Page Setup

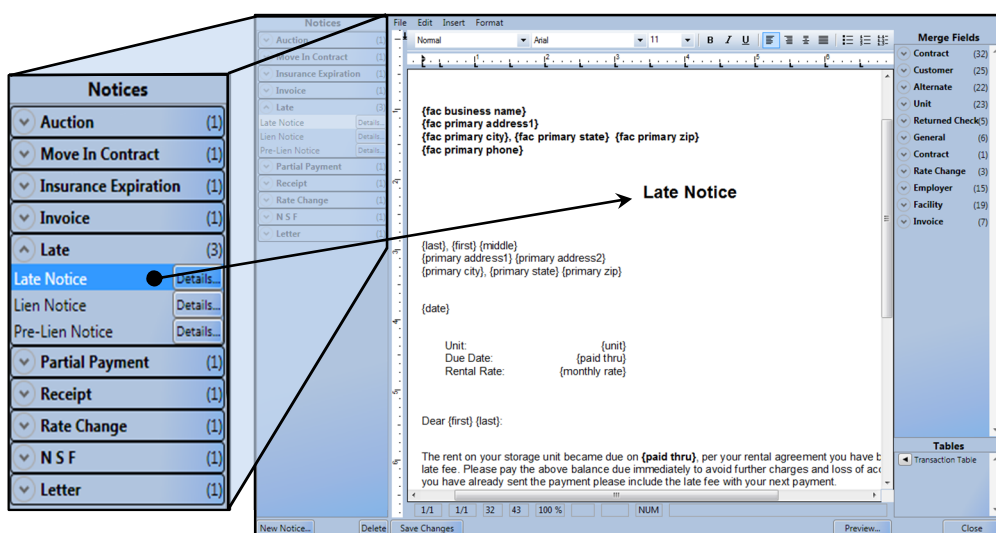
To change the page margins used in the selected document, click on the File pull down menu and select Page Setup. From this window you can change margins and paper size of the document and add columns. Please note that Headers / Footers are not supported in this editor.

### Paragraph Setup

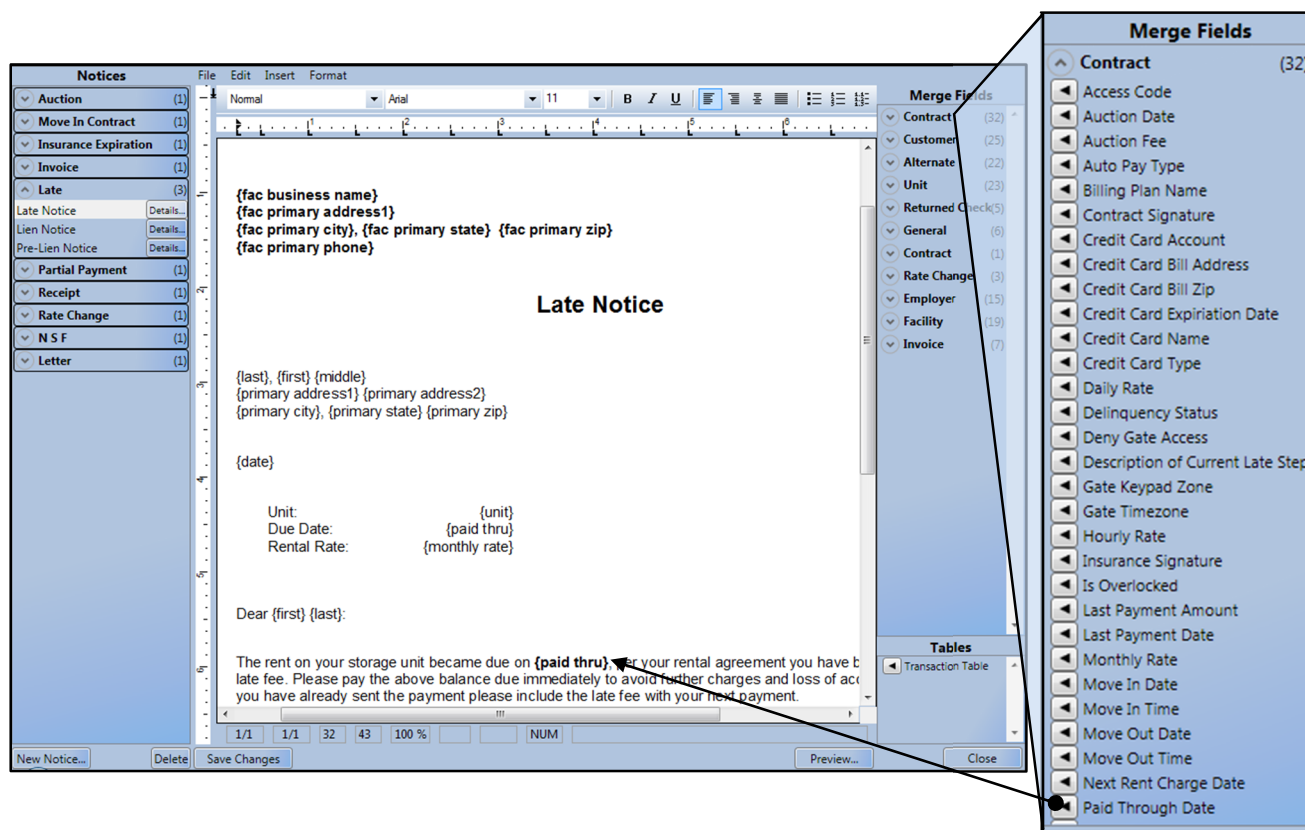
To customize the paragraph settings, click on the Format pull down window and select Paragraph, from here you will be able to modify the spacing and alignment of the selected paragraph in your document.

## EDITING A NOTICE

The notices contained in the Notice Panel are organized by notice type, to the left of each notice type is an arrow button, clicking on the arrow button will expand the list of available document for the notice type,



clicking the arrow button again will collapse the list. Click on the document to open it in the editing window. You can use standard Microsoft Word (2010) editing commands to insert new text. Use the tool bar located at the top of the edit window or the Format pull down menu to change text / paragraph attributes.



## ADDING MERGE FIELDS

A merge field can be added anywhere within a document and as many times as needed within a document. To add a merge field, position the editing cursor at the location where the condense of the merge field are to be placed, move the mouse over the appropriate merge field category and click on the down arrow to display a list of available merge codes, and click on the merge code to be placed into the document.

## DELETING A MERGE FIELD

Place the mouse cursor over the target merge field (when the mouse cursor is over a merge field the cursor will change to a pointing finger cursor), using the right mouse button, click one time and select Delete Field.



### Modifying Font Attributes in a Merge Field

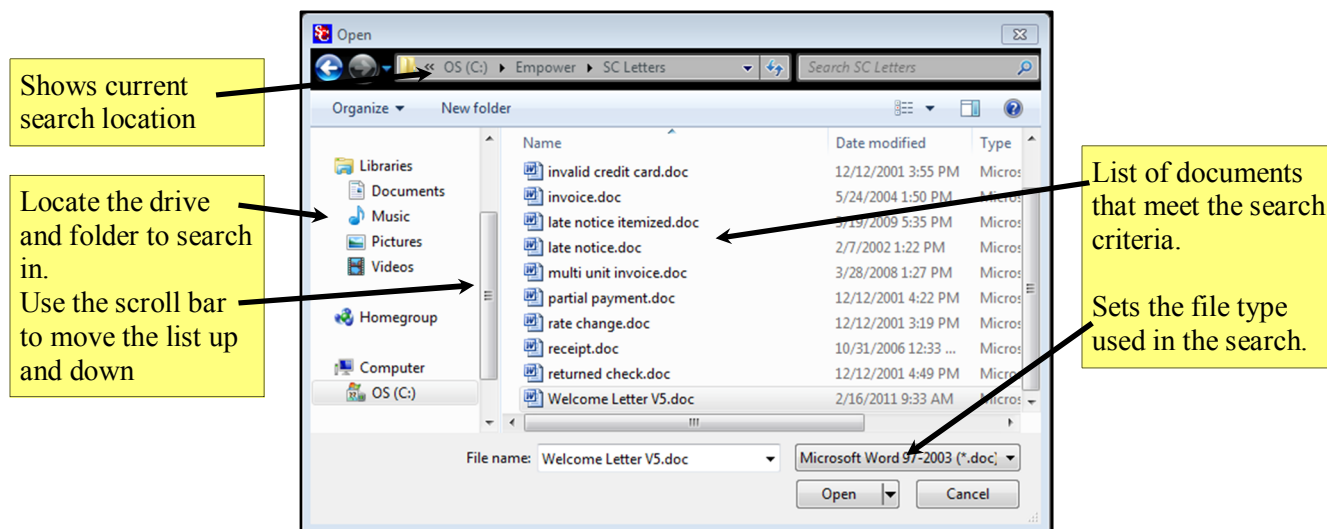
To modify the default font attribute in a merge field (changing typeface, size, bold, italic, underline), place the editing cursor in front of the curly bracket (}) of the merge field, if you like to use the keyboard for this type of operation (like I do), hold the Shift key down while tapping the right arrow key, to walk the editing cursor through the merge field one character at a time (you can also use the mouse to accomplish the same thing by holding down the left mouse button while moving the mouse through the merge field). Any character that is highlighted can now have its font attribute modified by selecting the font attribute from the tool bar located at the top of the editing screen.

## INSERTING PICTURES / LOGOS

To insert a graphic image (typically a logo) into your document click on the **Insert** pull down menu and select **Image**. This will open a Windows Search box, located in the lower right side of the search box is a button that allows you to filter the search to a specific file type (we recommend .JPG images because of their relative small file size). Clicking on the graphic image in the search box window will import the image into your document.

## IMPORTING WORD DOCUMENTS

Click on the **File** pull down menu and select **Import Word Document**, this will open a Windows Search box, you can import one of two word document formats .doc (Word 2003 and older word documents), or .docx (Word 2007 and newer word documents). Use the file filter button located in the bottom right of the Windows Search box to show only doc files or docx files. When you see the document in the list box, double click on it to open it in the editor, or you can click on the document one time and then click on the Open button to open the document in the editor..



# User Options

## User Management

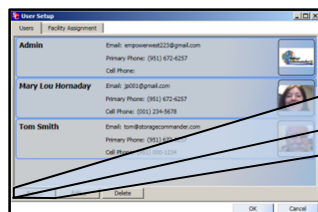


Setup new managers, record photo id and fingerprint access, select group security level, and assign manager to a facility(s).

This is where all new managers are entered into the Storage Commander V5 program. All information that is relevant to a manager is entered here and can be modified at any time by a manager who has the necessary security level to access this screen.

**Important Note:** Only Administrators who have logged in using the fingerprint identification system will be able to setup a new manager or edit the security setting for existing managers.

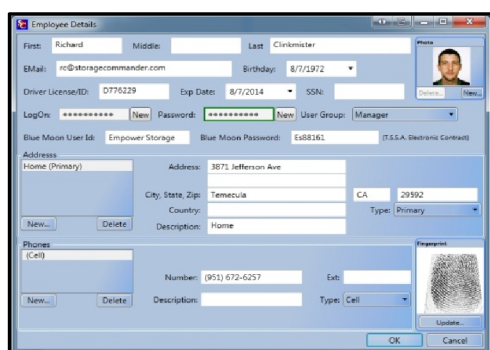
## SETUP NEW MANAGER



Click on the User Management button to open the User Setup window.

This window will display active managers. To add a new manager click on the **New** button

The Employee Details screen appears



Enter the employees Name, email, Birthdate, Driver License/ID, Exp Date, and SS Number, using the Tab key to progress from field to field.

To enter a Logon and Password, click on the NEW button next to the associated field and enter the data, keeping in mind that both the Logon and Password are case sensitive, meaning that both UPPER and lower case characters are allowed, requiring the Logon and Password must be entered by the manager using the same combination

To enter the employees address, first, click on the **New** button.

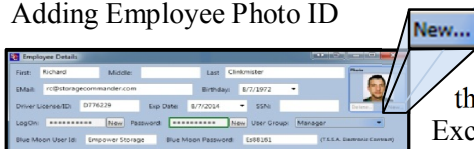
Next click on the **Type** button and select one of the three address types. You should now see a new address item in the **Address** list box. Now enter the new address using the Tab key or mouse to move from one field to another

**NOTE** Data entered into the Description field will also be added as a description in the **Address** list box.

To enter the employee's phone number, first, click on the **New** button. Next click on the **Type** button and select one of the seven phone types. You should now see a new phone number item in the **Phones** list box. Now enter the new phone number using the Tab key or mouse to move from one field to another ( holding the Shift key down while depressing the Tab key will allow you to move up to the previous field).

**NOTE:** Data entered into the Description field will also added as a description in the **Phones** list box.

Adding Employee Photo ID



Pictures or images can be brought into Storage Commander V5 through a variety of sources:

Excella STX multipurpose scanner, Storage Commander Photo ID kit, or graphic images can also be imported from outside sources.



In the New Photo window, enter the name of the employee in the **Reference Name** field and select the device you will be using to capture the image from, or select **Import** if the image is stored in an electronic format on your hard drive or other storage media.

## Using the Excella multipurpose scanner

The Excella multipurpose scanner only accepts photo id cards that are the same size as U.S. driver licenses. If you would rather use a picture of the managers face, you will need to use the Storage Commander V5 photo id camera.

Click on the button labeled Scan Image with the picture of the Excella multipurpose scanner. Insert the driver license into the Excella photo id slot located on the right side of the feed tray. When the picture of the id is displayed in the Scan Photo window click on the OK button to save the image and complete the process.

## Using the Storage Commander Photo ID kit

The Storage Commander Photo ID kit allows more flexibility in the types of id pictures you can bring into the program. Using the camera stand (included in the photo id kit) you can place the driver license in the stand and snap a picture of the entire license, or you can have the manager face the camera and take a picture of their face.

Place the driver license in the photo id stand, click on the button labeled Scan Image with the picture of Storage Commander photo id kit.

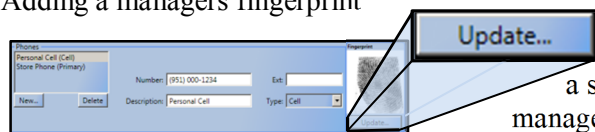


An image of the driver license will be displayed in the photo id transfer window, click on the Snap Image button to create a thumbnail image of the picture. If more than one snapshot was taken click on the thumbnail you will use and click on the Transfer Now button to save the picture.

## Importing an Image

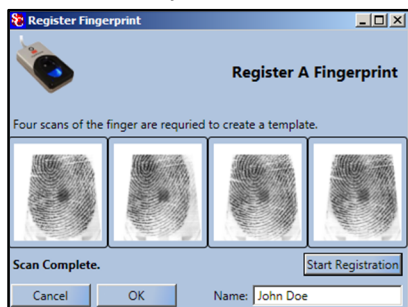
To import an image from an outside source (such as a digital camera), click on the **Import** button, the Windows search screen appears, navigate to the location where the digital picture is saved. Select the picture and enter a **Reference Name**. Click on **OK** to save the image.

## Adding a managers fingerprint



Fingerprint identification allows the manager to maintain a secure access to the program. With fingerprint id the manager does not need to memorize their logon and password (although a logon and password must be assigned during the profile setup) for access into the program, placing their finger on the fingerprint scanner will automatically identify the manager and allow them into the program with the pre-assigned security settings

To setup a managers for fingerprint identification click on the **Update** button in the Employee Detail Window. This will open the Fingerprint Registration window, enter the **Employee Name** and click on the **Start Registration** button. Although any finger can be used it is recommended that you use the right index finger for consistency.



Four scans will be used during the registration process in order to verify that a good image has been captured, after the fingerprint has been successfully registered, a single scan is all that will be needed to identify the manager. Click on the OK button to save and complete the process. An image of the fingerprint will be displayed in the fingerprint window.

## Setting a Managers Security Level

Click on the User Management button to open the User Setup window.

This window will display active managers, to make changes to the active managers configuration (such as changes to security status, fingerprint, photo or address) double click on the managers button to open their profile screen

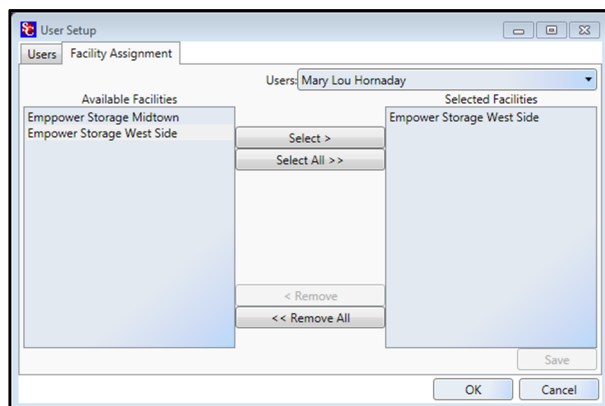


Click on the **User Group** button to open a drop down list of available security profiles. Click on the security profile to be assigned to this manager. To assign the new security to the managers profile click on the Save button, located at the bottom of the Employee Detail window.

*Security profiles are created in Group Management.*

## ASSIGNING MANAGER TO A FACILITY(S)

To assign a manager to one or more facilities, return to the **User Setup** window and click on the **Facility Assignment** tab.



Click on the down arrow in the **Users** field and select the manager to be assigned to the facility(s).

In the **Available Facilities** box you will see a list of all installed facilities. To select a facility, click on the facility to highlight it in the list. If the manager is to be assigned to more than one facility, you can select multiple facilities by holding down the Ctrl key while clicking on multiple facilities in the list. When all of the facilities have been selected (highlighted) click on the **Select** button to place them in the **Selected Facilities** box.

To transfer the manager to the facility(s) click on the

**Save** button.

## Group Management

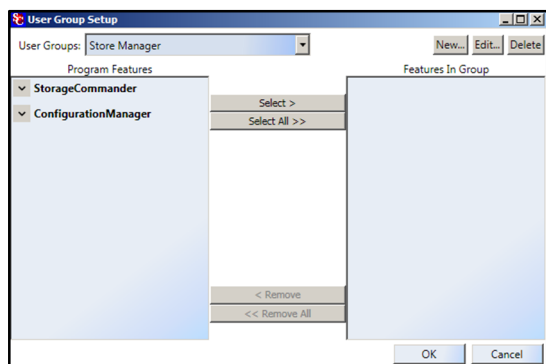
Under Group Management you can create new security profiles or edit existing security profiles. Once a security profile has been created it can be attached to a managers profile by opening the User Management window, selecting the manager and attaching it to the managers profile.



Security profiles allow you to control program function managers are allowed to access in the Storage Commander V5 program or in the Configuration Manager program.

## CREATING A SECURITY PROFILE

To create a new security profile click on the Group Management button, this will open the **User Group Setup** window, click on the **New** button and enter the **Group Name** that you will assign to this new security profile.

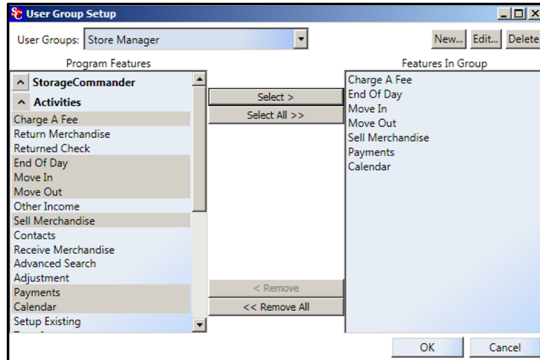


The User Group Setup window is comprised of two panels, **Program Features** and **Features In Group**. The items listed in the program features panel are functions that can be assigned to the security profile you are creating. In the sample screen shot to the left there are two items in the program features list box **Storage Commander** and **Configuration Manager**, clicking on the arrow next to an item in the list will either open the pull down menu for that item or close the menu for that item.

## ADDING PROGRAM FUNCTIONS TO A SECURITY PROFILE

Lets assume that the security profile *Store Manager* will be assigned to managers who will have limited access to program functions, and no access to the Configuration Manager program.

Click on Storage Commander in the Program Features list box, next select a function category from one of the Storage Commander drop down menu items, in this example I chose Activities.



Selecting items in the list is accomplished by clicking on an item in the list and then clicking on the Select button located in the center section between Program Features and Features In Group list boxes. You can select multiple items by holding down the Ctrl key on your keyboard while selecting multiple items in the list box, when you have selected all the items release the Ctrl key and click on the Select button to transfer all the highlighted items into the Features In Group list box.

To select all the items in a drop down menu, click on the Select

All button.

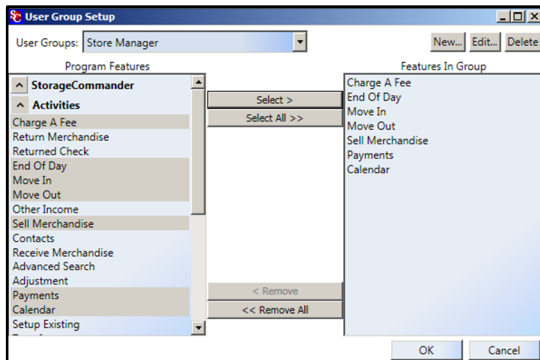
## REMOVING PROGRAM FUNCTIONS FROM A SECURITY PROFILE

Select the program function to be removed from the *Features In Group* list box, after the item has been selected click on the **Remove** button (located in the center section between *Program Features* and *Features In Group* list boxes) to remove the program function.

The **Remove All** button will remove all items in the *Features in Group* list box.

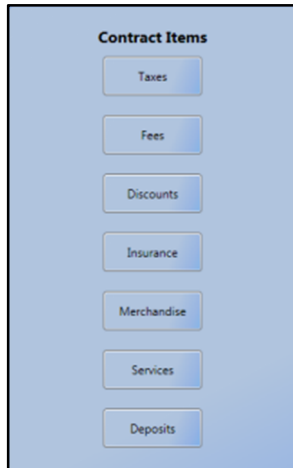
## EDITING AN EXISTING SECURITY PROFILE

In the **User Options** section of the Configuration Manager click on the **Group Management** button. Locate the User Groups field and click on the down arrow to open the drop down list of existing security profiles. To add additional program functions, select the program function from the Program Features list box and click on the Select button to add the new function to the active security profile.



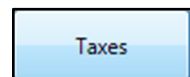
To remove program functions from the active security profile, click on the program function in the Features In Group list box and click on the Remove button to delete the program function from the active security profile.

## Contract Items

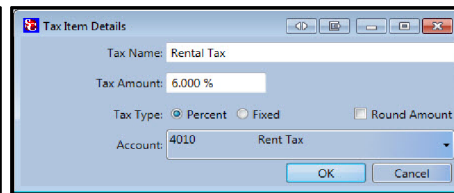
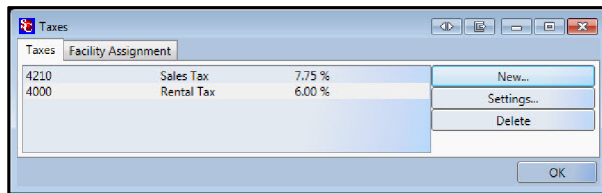


In the Contract Items screens you can create charge and discount items that can be attached to customer accounts. Charge items can include rent tax, sales tax, fees (excluding late fees which are created in the Accounting section) or any other type of charge transaction you use in your facility. Additionally you can create discount transaction types, such as move in specials, referrals, or other discounts. During the creation of a fee or discount you will be asked to associate the fee or discount with the corresponding account number identified in the Chart of Accounts (see Chart of Accounts, located in the Accounting section of the Configuration Manager). This allows Storage Commander V5 to track transactions by account number

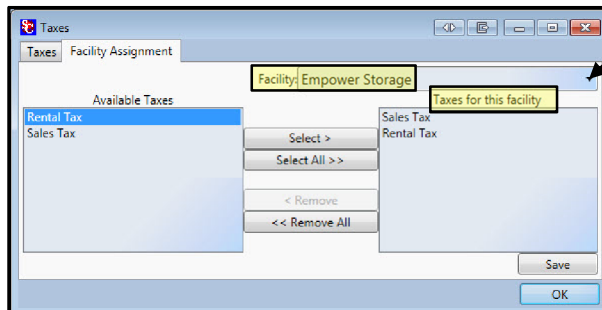
## Creating Tax Items



To create a new tax item and assign it to a facility, click on the Taxes button in the Contract Items section. This will open the Taxes window where you will see tax transaction types that have already been created. Click on the NEW button to open the Tax Item Detail window, enter the name of the new tax item, the amount of the tax and select Percent or Fixed (dollar amount). Now click on the down arrow in the Account field to select the account number that will be used assign this tax transaction to your chart of accounts.



Now that you have created a new tax item, you will need to assign it to the facilities that will be using this tax item.



Click on the down arrow in the **Facility** field and select the facility that you will be assigning this tax item to.

The facility that you just selected should now be listed in the **Facility** field. Locate the tax item from the list in the **Available Taxes** list box. With the tax item highlighted click on the **Select** button to copy the tax item to the facility listed in the Facility field. Click on the **Save** button to save the changes to the facility.

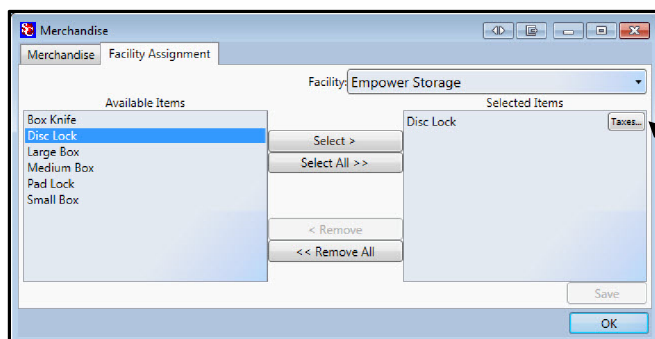
## REMOVING A TAX ITEM FROM A FACILITY

Locate the tax item to be removed from a facility by highlighting the tax item in the **Taxes For This Facility** list box and clicking on the Remove button.

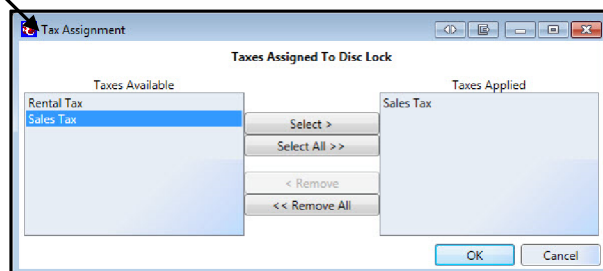
Removing a Tax Item will prevent the tax from being assigned to new facilities, and removes the tax item from the selected facility. However the tax item will not be removed and will remain active on customer accounts at the selected facility where the tax item has been previously attached. To change a customer account so as not to charge tax you must change the customers billing plan to one that does not include tax (see Billing Plans for information on how to change a customers billing).

## Assigning Tax

Rent, Merchandise, Billing Plans, Fees, Services & Deposits can all be setup to include one or more tax charge when applied to an account. To assign an auto tax charge to any of these items, select the **Facility Assignment** tab from the associated setup window, and click on the item in the list that you will be adding a tax charge to

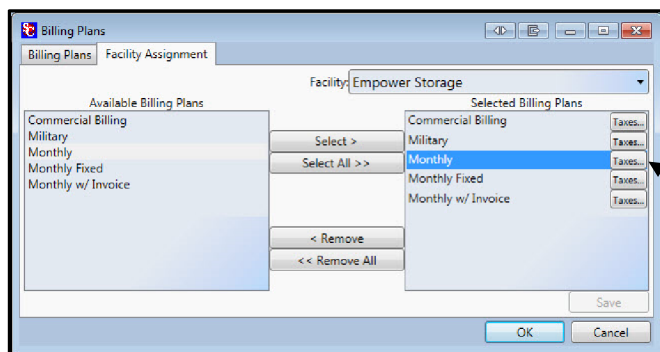


Click on the **Taxes** button to open the **Tax Assignment** window and select the tax type that will be associated with the sales item.

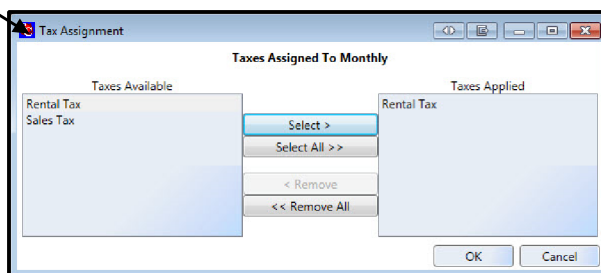


## Assigning Tax to Rent

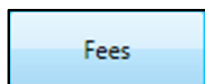
To assign rental tax to a facility, click on the **Billing Plans** button under the **Accounting** section of the configuration manager. This will open the **Billing Plans** setup window, click on the **Facilities Assignment** tab. If more than one billing plan is listed in the **Selected Billing Plans** list box, select the billing plan you have chosen to charge rental tax on, click on the **Taxes** button next to the billing plan you have selected as taxable. The **Tax Assignment** window will now open allowing you to select the Tax item you will use as rental tax at the selected facility



Click on the **Taxes** button to open the **Tax Assignment** window and select the tax type that will be associated with this Billing Plan.



## Creating Fees

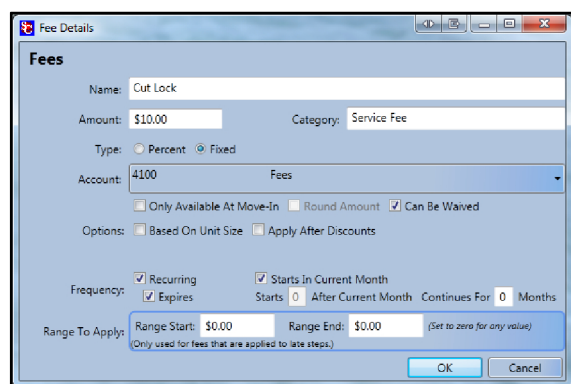


To create Fees that can be used at your facilities (such as: Admin, Invoice, Lock Cut, & Late fees...) click on the Fees button in the Contract Items section. This will open the Fees window where you will see fee transaction types that have already been created. Click on



the **NEW** button to open the **Fees Detail** window, enter the name of the new fee item, the amount of the fee and select **Percent** (of the rental rate) or **Fixed** (dollar amount). Now click on the down arrow in the Account field to select the account number that the fee will be assigned to in your chart of accounts.

The Options section allows you to define how the fee is applied and if the fee can be waived is it is set up as an automatically applied fee.



- ☒ **Only Available At Move-In**  
When selected only allows this fee to be available at Move-In.
- ☒ **Round Amount**  
If the fee is configured as a percent, enabling this function will round the fee amount up or down at .50¢
- ☒ **Can Be Waived**  
When selected allows fee to be waived, using the wave fee selection in the payment window.
- ☒ **Based On Unit Size**  
If this box is checked the fee that will be charged will be based on the fee associated with the unit size.  
(See [Creating & Editing Units](#) for information on assigning fees based on unit sizes)

- ☒ **Apply After Discounts**  
If this option is attached to a fee, the value of the fee will be reduced by any discounts that are in affect at the time the fee is applied (*this only applies to fees that are percent based*).

### Frequency

- ☒ **Recurring**  
If this option is attached to a fee and the Expires option is *not* selected, the fee will be charged to the customer account each billing period.
- ☒ **Expires**  
Selecting this option allows the fee to become active as soon as it is placed on a customer account (select Starts In Current Month), or at some time in the future (select Starts x months After Current Month), and run for a predetermined number of months (Continues For x Months)

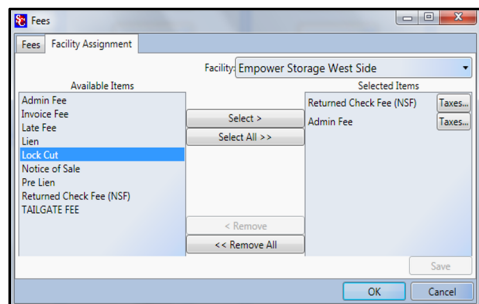
### Range To Apply

This function only applies to fees that will be associated with the late process.

Entering dollar values into the “Range Start” and “Range End” fields will cause this late fee to apply itself only if the balance on the account is within this range

## ASSIGNING FEES TO A FACILITY

Once a fee has been created in Configuration Manager it will need to be assigned to the Storage Commander V5 program to be used at the designated facility.



To transfer (assign) a fee or multiple fees to a specific facility click on the **Facility Assignment** tab to open the Fee Assignment window

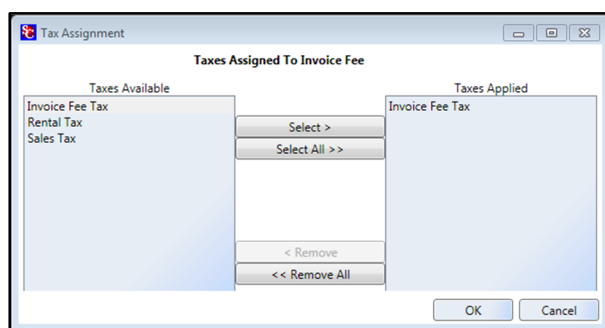
Click on the down arrow in the **Facility** field and select the facility that you will be assigning this fee item too.

Locate the fee item from the list in the **Available Items** list box.

With the fee item highlighted click on the **Select** button to copy the fee item into the **Selected Items** box.

## ASSIGNING A FEE AS TAXABLE

If the fee is to be considered as a taxable item, click on the Tax button to the right of the fee item, this will open the **Tax Assignment** window.



Select the appropriate tax account and click on the Ok button to associate the tax with the fee item and return to the **Facility Assignment** window, click on the **Save** button to complete the operation and transfer the fee item to the selected facility.

## EDITING A FEE

To edit an existing fee, locate the fee in the **Fees** window, with the item highlighted, click on the setting button. This will bring up the **Fees Details** window, make the changes to the fee and click on the OK button to save the changes and close the window.

## DELETING A FEE

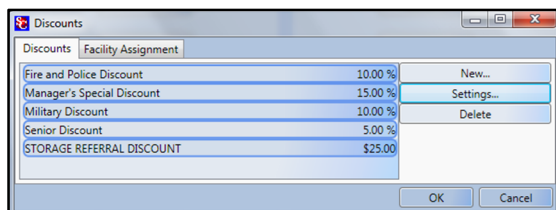
To delete an existing fee, locate the fee in the Fees window, with the fee highlighted, click on the Delete button.

Deleting a fee will prevent the fee from being assigned to new facilities, and removes the fee from the selected facility. However the fee will not be removed and will remain active on customer accounts at the selected facility where the fee has been previously attached. Removing the fee from the *customer account* must be done through the Storage Commander V5 program.

## Creating Discount

### Discounts

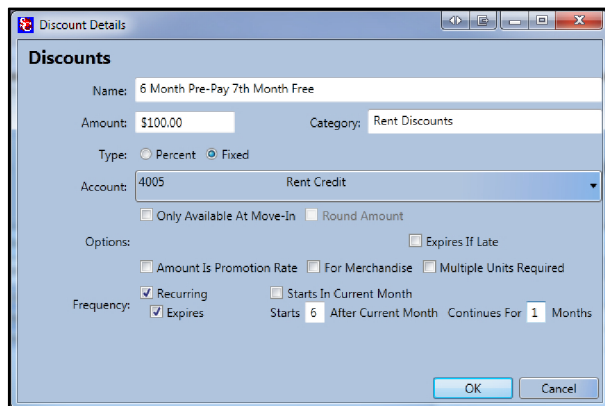
To Create Discounts that can be used at you facilities (such as: Referral discount, ½ Month off, Free Month...), Click on the Discounts button in the Contract Items section.



This will open the Discounts window where you will see discount transaction types that have already been created.

Click on the **NEW** button to open the Discounts Detail window, enter the **Name** of the new discount item, and the **Amount** of the discount. Select **Percent** (of the rental rate) or **Fixed** (dollar amount). Now click on the down arrow in the **Account** field to select the account number that this discount will be assigned to in your chart of accounts (*typically this would be assigned to account number 4600 – Rent Discount*).

The **Options** section allows you to configure how the discount applied.



#### ☒ Only Available At Move-In

When selected allows this discount to be available at Move-In, and will not allow the discount to be added to an existing account.

#### ☒ Round Amount

Only active on discounts that are applied as a percentage of rent. Select to round the value of the discount up, to the nearest dollar

#### ☒ Variable Amount

Allows the value of the discount to be entered at the time the discount is applied to an account

#### ☒ For Merchandise

Allows special Merchandise discount categories to be

created that can track discounts applied to merchandise sales differently than rental discounts. It is recommended that this type of discount be assigned to account 4700 "Merchandise Discounts" for accounting purposes.

#### ☒ Amount Is Promotion Rate

With this option selected the system will automatically calculate the discount needed on the rental rate to equal the value entered into the **Amount** field. Only available at move-in.  
(this can only be used when the **Type** selection is set to **Fixed**)  
*An example of this discount would be a \$1.00 Move-In Special*

#### ☒ Multiple Units Only

When selected configures the discount to be restricted to customers who have two or more units.

#### ☒ Expires If Late

When selected this discount will not be applied to an account that is in a late step

### Frequency

#### ☒ Recurring

If this option is attached to a discount and the **Expires** option is **not** selected, the discount will be given to the customer each billing period until the customers moves out, or the discount is removed from the account.

#### ☒ Expires

Allows the discount to self-activate (x) number of months from the month the discount was added to the account (**Starts** ☐ **After Current Month**), and run for (x) months (**Continues For** ☐ **Months**).

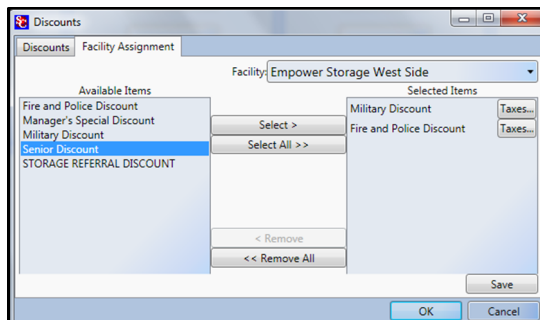
#### ☒ Starts In Current Month

Allows the discount to apply itself in the same month the discount was added to the account.

## ASSIGNING DISCOUNTS TO FACILITIES

Once a discount has been created in Configuration Manager it will need to be assigned to the Storage Commander V5 program to be used at the designated facility.

To transfer (assign) a discount or multiple discounts to a specific facility click on the **Facility Assignment** tab to open the Discount Assignment window



Click on the down arrow in the Facility field and select the facility that you will be assigning this discount item too. The facility that you just selected should now be listed in the Facility field. Locate the discount item from the list in the Available Taxes list box. With the discount item highlighted click on the Select button to copy the discount item to the facility listed in the Facility field.

## EDITING A DISCOUNT

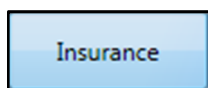
To edit an existing discount, locate the discount in the Discounts window, with the discount highlighted, click on the setting button. This will bring up the Discounts Details window, make the changes to the discount and click on the OK button to save the changes and close the window.

## DELETING A DISCOUNT

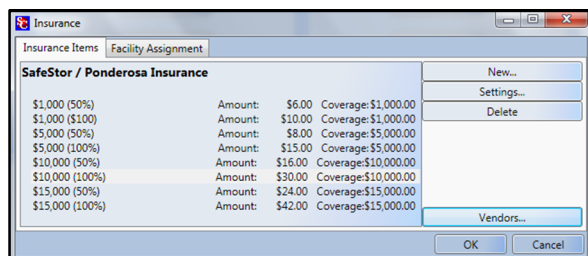
To delete an existing discount, locate the discount in the Discounts window, with the discount highlighted, click on the Delete button.

Deleting a discount will prevent the discount from being assigned to new facilities, and removes the discount from the selected facility. However the discount will not be removed and will remain active on customer accounts at the selected facility where the discount has been previously attached. Removing the discount from the *customer account* must be done through the Storage Commander V5 program.

# Insurance

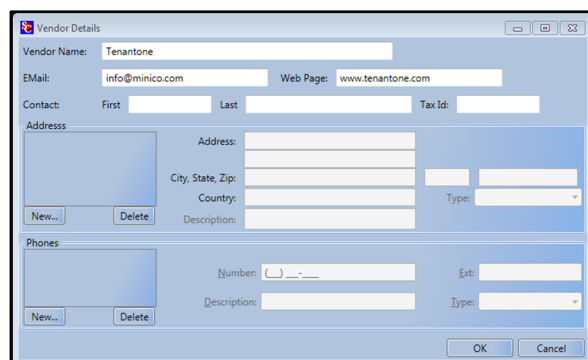


Storage Commander V5 comes pre-loaded with SafeStor from Ponderosa Insurance. All of the SafeStor insurance plans and their respective policy and the insurance contracts are immediately available.



Other insurance companies can also be used with the Storage Commander V5 program. To install a new insurance provider into the system click on the **Vendors** button in the Insurance window

When the Vendors window opens click on the New button to open the editing window for the Insurance providers company information



## Adding a New Address

First, click on the **New** button in the **Address** section. Next click on the **Type** button and select one of the three address types. You should now see a new address item in the Address list box. Now enter the new address using the Tab key or mouse to move from one field to another (holding the Shift key down while depressing the Tab key will allow you to move up to the previous field).

**NOTE:** Data entered into the Description field will also be added as a description in the Address list box.

## Adding a New Phone Number

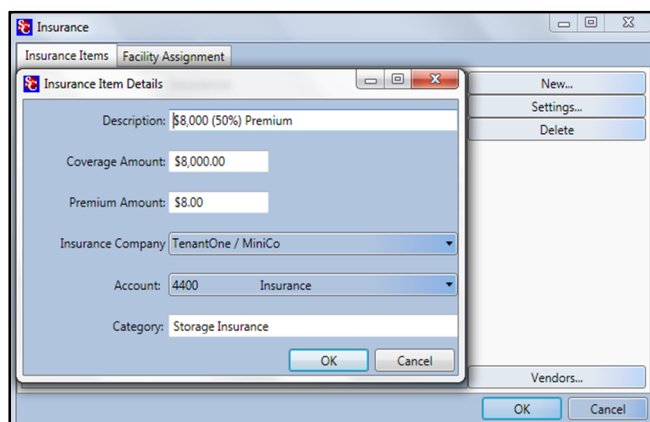
First, click on the **New** button in the **Phones** Next click on the **Type** button and select one of the seven phone types. You should now see a new phone number item in the **Phones** list box. Now enter the new phone number using the Tab key or mouse to move from one field to another (holding the Shift key down while depressing the Tab key will allow you to move up to the previous field).

**NOTE:** Data entered into the Description field will also added as a description in the **Phones** list box.

Click on the **OK** button at the bottom of the window to save and return Vendors window, click on the Close button to return to the Insurance window.

## SETUP/EDIT NEW INSURANCE POLICIES

To add insurance policies to the new insurance provider, click on the **New** button in the Insurance window.



This will open the **Insurance Items** widow, enter the name of the insurance policy in the **Description** field, the amount of insurance coverage for this policy in the **Coverage Amount** field, and the amount that will be charged to this customer for this insurance policy in the **Policy Amount** field.

Click on the down arrow in the **Insurance Company** field to show a list of insurance providers (Vendors) that were installed previously. Select the insurance provider for this policy from the list. In the **Account** field click on the down arrow to open a list of available accounts and select the account to assign this insurance transaction to from the list. If you

would like to create sub-categories under the insurance provider name, you can enter the name of the category in the **Category** field

## EDITING A POLICY

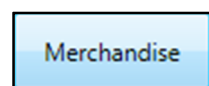
To edit an existing insurance policy, locate the policy in the Insurance / Insurance Items window, with the policy highlighted, click on the setting button. This will bring up the Insurance Items Details window, make the changes to the police and click on the OK button to save the changes and close the window.

## DELETING A INSURANCE POLICY

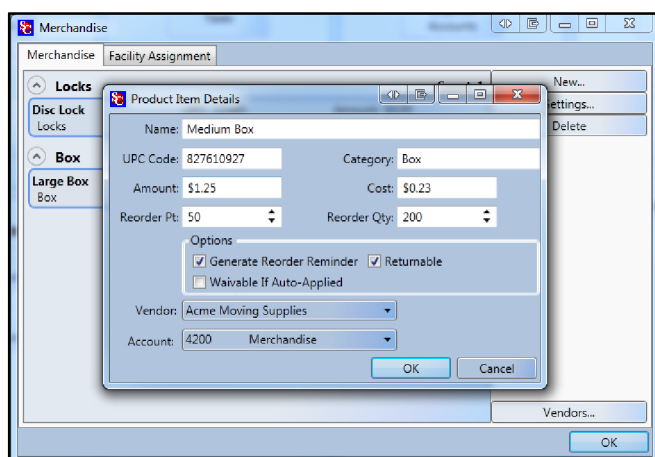
To delete an existing policy, locate the policy in the Insurance / Insurance Items window, with the policy highlighted, click on the Delete button.

Deleting a policy will prevent the policy from being assigned to new facility and remove the policy from available policies at the selected facility. The policy will remain in effect for Customers who had the policy assigned to their unit prior to it being deleted it does not remove the policy from any customer accounts that the policy has been previously assigned to.

## Setup Merchandise



To setup merchandise to be sold at a facility through the Storage Commander V5 system click on the Merchandise button located in the **Contracts Items** section, this will open the **Products and Services** window

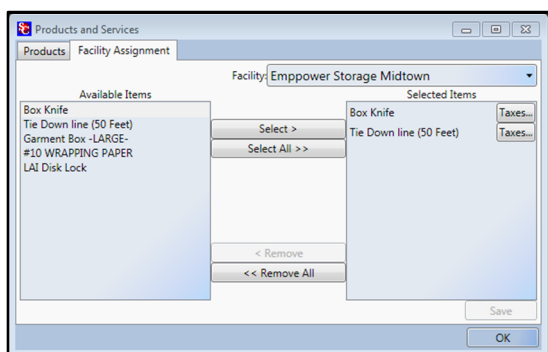


To add an inventory item into the system click on the **New** button to open the **Product Item Detail** window. Enter the Name of the item, the UPC barcode number (*this is optional field designed to work with a barcode scanner*). To enter vendor information to aid in reordering merchandise, select the Vendor button located at the bottom of the Merchandise window and click on New to setup a new vendor. The Category field allows you to separate merchandise items by their category (for example, creating Locks and Boxes categories will allow you to place all your box merchandise items under the Boxes category, and your lock merchandise items under the Locks category making

it easier to locate merchandise items by category. Now enter the Amount (sell price) of the item and the Cost (your purchase price) of the item (*if we have the sell price and the cost of the item you will be able to see merchandise profit in the financial reports*). The **Reorder Point** sets your minimum inventory point and will generate a low inventory alert if you select **Generate Reorder Reminder**. The **Reorder Qty.** field will display the recommended quantity of the item to reorder when the system detects that the item is at or below the reorder point. If the merchandise is returnable, click on the **Returnable** option to allow this item to be returned for a refund. If you have setup a vendor for this item click on the down arrow in the **Vendor** field to select the vendor you used to purchase this item from. The last step is to assign an account number used for merchandise sales. To do this click on the down arrow in the **Account** field, this will open the chart of accounts; locate the account number you have assigned for merchandise sales and click on it to assign it to this merchandise item.

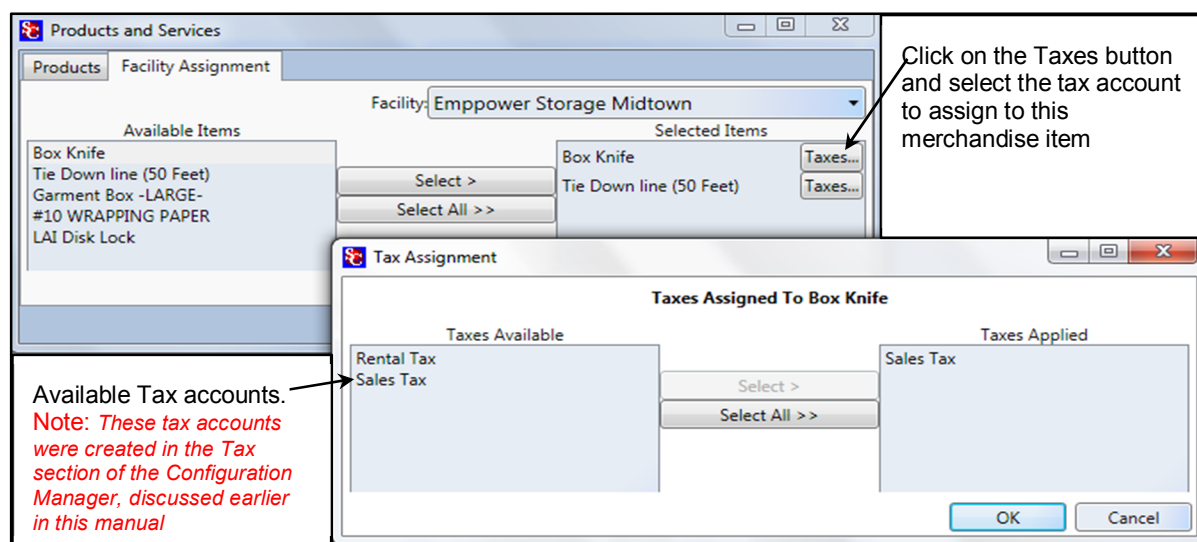
## ASSIGNING MERCHANDISES TO A FACILITY

Once a Merchandise item has been created it will need to be assigned to the Storage Commander V5 program to be used at the designated facility.



To transfer (assign) a Merchandise item or multiple Merchandise items to a specific facility click on the **Facility Assignment** tab to open the Merchandise Assignment window

Click on the down arrow in the Facility field and select the facility that you will be assigning this Merchandise item too. The facility that you just selected should now be listed in the Facility field. Locate the merchandise item from the list in the **Available Items** list box, with the Merchandise item highlighted click on the Select button to copy the merchandise item to the **Selected Items** list box.



Click on the Taxes button and select the tax account to assign to this merchandise item

Available Tax accounts.

*Note: These tax accounts were created in the Tax section of the Configuration Manager, discussed earlier in this manual*

If the merchandise item is to be taxed click on the **Taxes** button next to the item and select which tax account will be applied to the sale of this merchandise item.

## EDITING A MERCHANDISE ITEM

To edit an existing merchandise item, locate the merchandise item in the Products and Services window, with the merchandise item highlighted, click on the setting button. This will bring up the Product Item Details window, make the changes to the merchandise item and click on the OK button to save the changes and close the window.

## DELETING A MERCHANDISE ITEM

To delete an existing merchandise item, locate the merchandise item in the Products and Services window, with the merchandise item highlighted, click on the Delete button.

Deleting a merchandise item will prevent the merchandise item from being assigned to new facilities, it does not remove the merchandise item from any facility that the merchandise item has been previously assigned to.

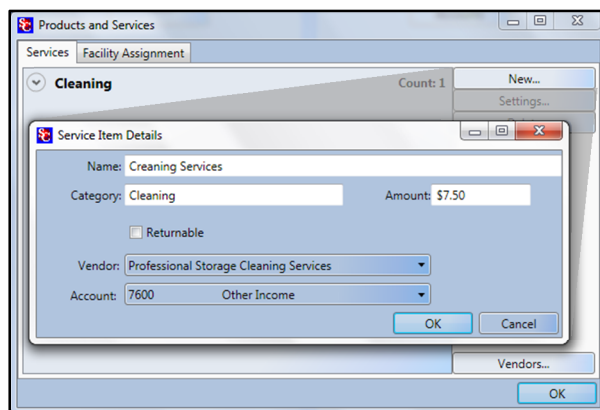
## RECEIVING MERCHANDISE AT THE FACILITY

Receiving new merchandise shipments is done at the facility through the Storage Commander V5 program. From the Storage Commander V5 program select the **Activities** pull down menu item and click on **Merchandise / Receive Inventory** Locate the merchandise item in the Items box, or if you are using the optional bar code gun, simply scan the barcode label. Once you have selected the inventory item click on the **Add To Inventory** button and enter the inventory quantity you are receiving. Click on the **OK** button to complete the process.

## Setup Services



Adding Service class transaction to your facility gives you the ability to setup unique services such as cleaning, truck rental, trash removal... When applying a service charge to an account you are given the ability to increment the number of charges for the service item being added to the account. An example of this would be (and charge for the associated service when taking a payment.



To create a Service item click on the **Services** button in the **Contract Items** section, this will open the **Products and Services** window. If this service is provided by an outside company, you can enter the company information by clicking on the **Vendors** button located at the bottom of the Products and Services window.

Click on the **New** button to open the Service Item Detail window. Enter the name of the service you are creating, the Category name this service will be listed under, in the Amount field enter the amount to charge for this service. If this service is provided by an outside company, and you have entered the company information as discussed above,

you can select the company from the list of vendors by clicking on the down arrow in the Vendor field. Select the account number to charge this service against by clicking on the down arrow button in the Account field and selecting the account number from the chart of account list.

### Editing A Service

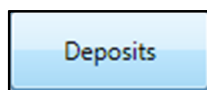
To edit an existing service, locate the service in the Products and Services window, with the service highlighted, click on the setting button. This will bring up the Services Details window, make the changes to the service and click on the OK button to save the changes and close the window.

### Deleting A Service Item

To delete an existing service, locate the service in the Products and Services window, with the service highlighted, click on the Delete button.

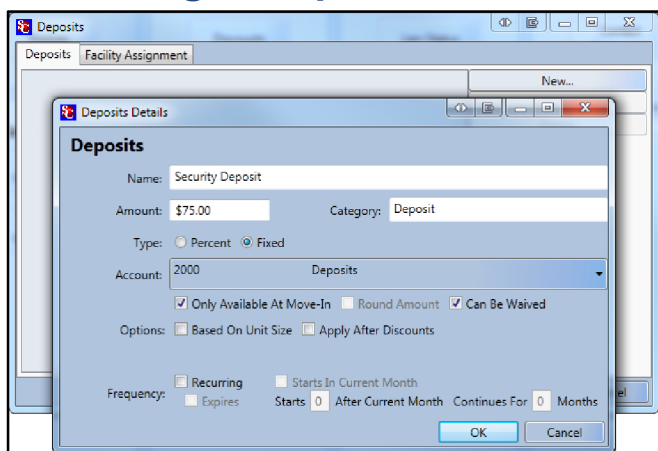
Deleting a service will prevent the service from being assigned to new facilities; it does not remove the service from any customer accounts that the service has been previously assigned to.

# Deposits Accounts



Deposit accounts allow you to apply a predetermined charge against a move-in that can be credited back to the customer at move-out. An example of deposit charges would be Security deposit or Cleaning deposit, which could be returned to the customer at move-out providing they meet performance guidelines.

## Creating A Deposit



To setup a deposit account click on the **Deposit** button in the Contract Items section, this will open the Deposits window where you will see deposit transaction types that have already been created. Click on the **NEW** button to open the Deposit Detail window, enter the name of the new deposit item, and the amount of the deposit. Select **Percent** (of the rental rate) or **Fixed** (dollar amount). Now click on the down arrow in the **Account** field to select the account number that this deposit will be assigned to in your chart of accounts.

### ☒ Only Available At Move-In

When selected allows this discount to be available at Move-In, and will not allow the discount to be added to an existing account.

When you have completed setting up the deposit, click on the OK button to save and close the deposit and return to the Deposits window. The deposit you just created should be listed in the Deposits window.

## EDITING A DEPOSIT

To edit an existing deposit, locate the deposit in the Deposits window, with the deposit highlighted, click on the setting button. This will bring up the Deposits Details window, make the changes to the deposit and click on the OK button to save the changes and close the window.

## DELETING A DEPOSIT

To delete an existing deposit, locate the deposit in the Deposits window, with the deposit highlighted, click on the Delete button.

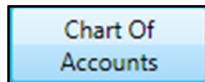
Deleting a deposit will prevent the deposit from being assigned to new facilities, and removes the deposit from the selected facility. However the deposit will not be removed and will remain active on customer accounts at the selected facility where the deposit has been previously attached. Removing the deposit from the *customer account* must be done through the Storage Commander V5 program.

# Accounting



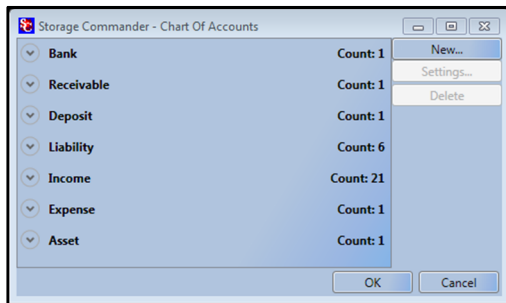
The Accounting section of the Configuration Manager is where you setup and configure the Chart Of Accounts in the Storage Commander V5 program to match the chart of accounts that your accountant / CPA uses for your facility. This section will also show you how to create billing policies (how you charge rent), setup your late policies, and create customized groups of reports that you specify to cover specific date ranges and automatically print and/or email during the end of day, week, month, quarter or year.

## Creating the Chart of Accounts



Selecting this setup option allows you to configure the Storage Commander V5 chart of accounts to match the chart of accounts used in your companies accounting system.

Clicking on the Chart Of Accounts button in the Accounting section, will open the Storage Commander-Chart Of Accounts window.

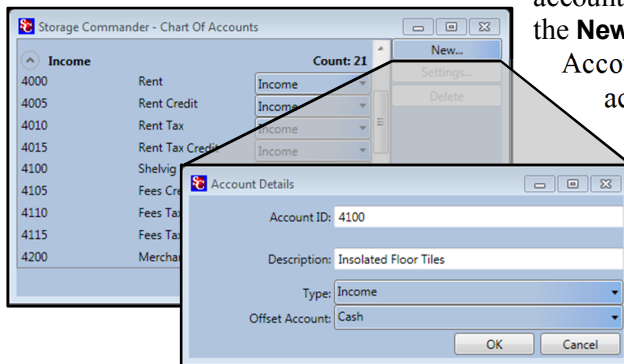


This window lists all of the account categories that are available within the Storage Commander V5 system. The down arrow to the left of each item allows that item to expand listing all of the account classes that have been created; clicking on the arrow button again will collapse the list. To the right of each item is a running total of how many classes have been created for the account category.

To create a new account class, click on the account category for the account class you will be creating, this will expand the list of account classes already created for this category. Now click on the **New** button to open the **Account Details** window, in the

Account ID field enter the account number you use in your accounting system for this transaction type, in the

**Description** field enter the name for this item.



In the **Type** and **Offset Account** fields you will need to select the account type and it's corresponding offset account that you use in your accounting system when you post a transaction against this account number.

All of the financial and transaction reports generated by Storage Commander V5 will reference the account number associated with each transaction recorded in Storage Commander.

## EDITING THE CHART OF ACCOUNTS

To edit an existing account class, open the Storage Commander-Chart of Accounts window and locate the account category where the account class resides, with the account class highlighted, click on the setting button. This will bring up the Accounts Details window, make the changes to the account class and click on the OK button to save the changes and close the window.

## DELETING AN ACCOUNT CLASS

To delete an existing account class, open the Storage Commander-Chart of Accounts window and locate the account category where the account class resides, with the account class highlighted, click on the Delete

button, when asked for verification of the delete request click on the Yes button to delete the account class from the chart of accounts.

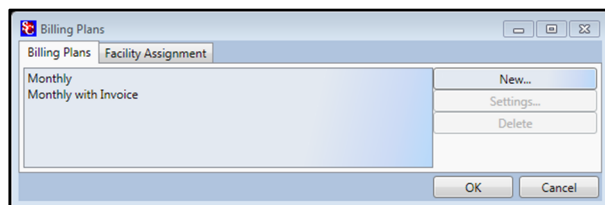
## Billing Plans

### Billing Plans

Billing plans allow you to regulate how a customer is charged for the rental of their storage locker and/or RV space.

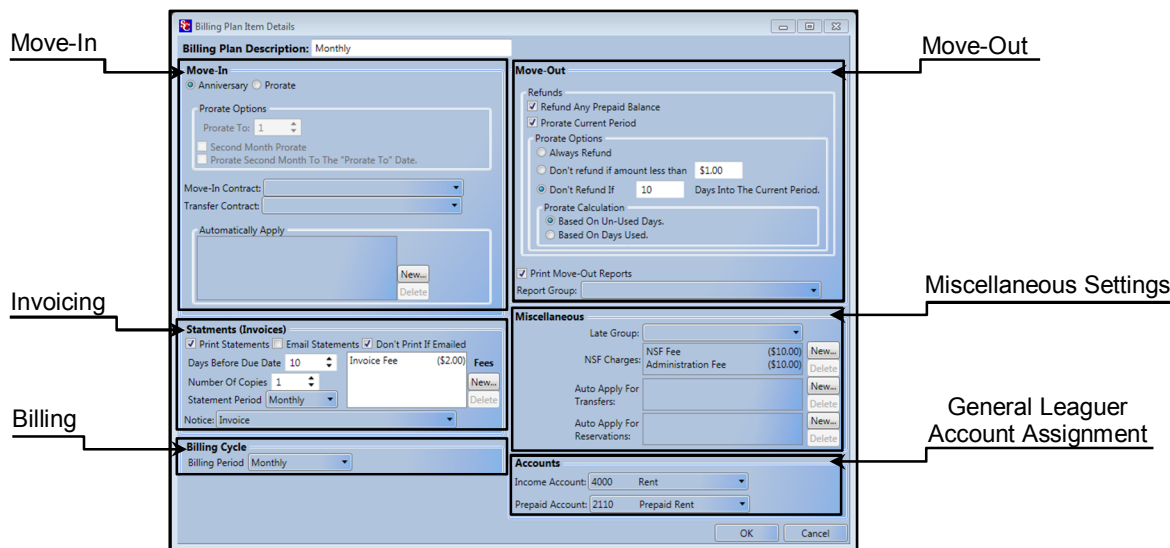
Storage Commander will associate a billing plan with a customer at the time the customer moves into your facility. When setting up the billing plan you have control over how the billing plan is structured for the **Move-In** process as well as for the **Move-Out** process, and to what facilities this plan will be available. You can create as many variations of a billing plan as you need to cover the diverse requirements of your facility(s).

## CREATING A BILLING PLAN



From the Configuration Manager main window click on the **Billing Plan** button under the Accounting section. This will open the Billing Plans window where you will see billing plans that have already been created. Click on the **New** button to open the **Billing Plans Detail** window.

The **Billing Plan Items Detail** window is split into six sections; **Move-In**, **Move-Out**, **Invoicing**, **Billing Cycle**, **Miscellaneous** and general leaguer **Accounts** assignment.



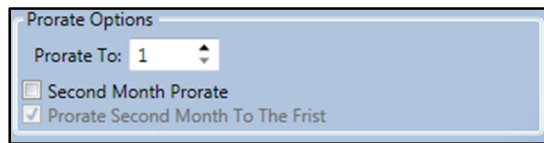
## CREATING A MOVE-IN POLICY

First determine if this billing plan will be based on **Anniversary** or fixed month **Prorate**

**Anniversary billing**, where the customer is billed each month on the calendar day of the move-in (example: If the customer moved in on the 28<sup>th</sup> of February, they would be billed each month on the 28<sup>th</sup>, whereas if they moved in on March 31<sup>st</sup> they would be billed on the last day of each month.

**Prorate** (fixed month), where the customer rent is due on set day of each month (typically the 1<sup>st</sup>) and the system calculates the prorated value for the remaining days in the in the month as the customers first rent balance

## PRORATE OPTIONS



**Prorate To:** If the customer would rather have their rent due on a specific day of the month (like the 15<sup>th</sup> of the month) enter the calendar day (15) into the **Prorate To** field. This will cause Storage Commander to calculate the rent due from the move-in day to the 15<sup>th</sup> of the month, and subsequently charge rent on the 15<sup>th</sup> of each month.

### Second Month Prorate:

Second Month Prorate allows you to collect a full month's rent at move-in, and calculate the prorated rent in the following (second) month

### Prorate Second Month To The First

This option will only work if the Prorate To option is set to 1 (first of month) and you have selected Second Month Prorate.

- ☒ **Second Month Prorate.** Prorated rent will become due on the (1<sup>st</sup>)first of the month following the move-in month (2<sup>nd</sup> month).
- ☒ **Prorate Second Month To The First.** Prorated rent will become due on the calendar day of the move-in on the 2<sup>nd</sup> month (example: if the customer moved in on the 17<sup>th</sup> of the month, the prorated rent will be due on the 17<sup>th</sup> of the next month, with subsequent rent due on the 1<sup>st</sup> of each month thereafter.

## Move-In & Transfer Contracts

When selected Storage Commander V5 will automatically generate a move-in or transfer contract, with the customer information, unit information and other relevant information already filled in. In addition an exact copy with the customer's digitized signature is saved to the customer account and can be reprinted at any time.

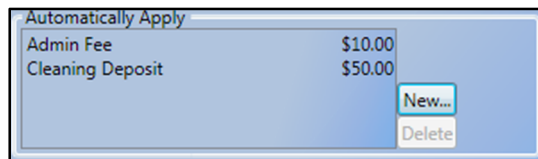
### SELECTING A MOVE-IN OR TRANSFER CONTRACT.

From the Billing Plans Item Details window click on the down arrow associated with the Move-In or Transfer contract. A list of available documents will be displayed, select the Move-In or the Transfer contract document, once selected the associated document file name will be displayed in the Move-In Contract field or the Transfer Contract field and the appropriate document will be automatically generated whenever a Move-In or Transfer is processed by the Storage Commander V5 system.

**Note:** Move-In, Transfer, Late Notices and other documents are created in the Notices section of the Configuration Manager.

### AUTOMATICALLY APPLY

Discounts, Fees, Merchandise Items, Deposits or Service Items, that have been setup in the system can be automatically applied at move in by selecting the item and placing it into the Automatically Apply box.

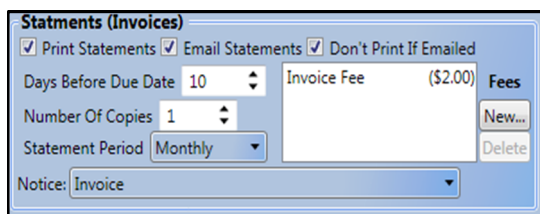


To select a discount or fee to be automatically applied during move in, click on the **New** button and select the discount or fee from the list.

To remove a discount or fee from the billing plan, select the fee or discount and click on the **Delete** button.

## Invoicing

Invoices can be automatically configured to be printed during the end of day processing or automatically added to the document print queue where you can email them.



To allow automatic generation of invoices place a check mark in the **Print Statements** box to print the invoices and not email invoices, placing a check mark in the **Email Statements** box will print and email the invoices, or you can select **Don't Print If Emailed** to allow Storage Commander V5 to automatically print an invoice for a customer who does not have an email address on file. next determine how many days' notice you

will give your customers of rent becoming due. Enter the number of days' notice in the **Days Before Due Date** field

If more than one copy of the invoice is needed, enter the number in the **Number Of Copies** field.

Determine how often invoices will be printed by clicking on the down arrow in the Statement Period field and selecting between Monthly, Quarterly, Semi Annual or Annual.

To select what notice will be used when printing the invoice, click on the down arrow in the Notice field and select the Statement / Invoice that has already been created from the list of notices.

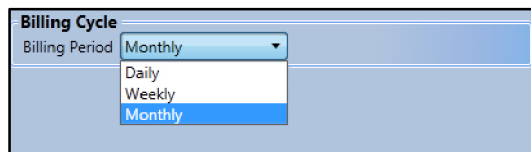
**Note:** Statements / Invoices are created in the **Notices** section of the **Configuration Manager** under Company Setup.

If you charge a fee for processing and mailing invoices to your customers click on the New button under Invoice Fees, select Fees to expand the list of fees that you have previously created. Now click on the fee to be assigned to invoices.

**Note:** Fees are created in the Fees section under Contract Items and **must** be assigned to the facility(s) that will be using this billing plan.

## BILLING

The billing cycle determines how often units assigned to this billing plan will be charged rent.



To assign a billing cycle to this billing plan, click on the down arrow in the Billing Period field and select from the list of available billing cycles.

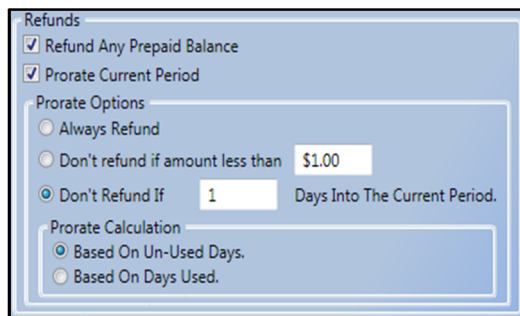
# Move Out

## CREATING A MOVE OUT POLICY

The first thing to consider when creating a move out policy, is how to manage the proration of money at the time of the move out. Do you require advanced notification of a move out to qualify for a prorated refund? Do you refund prepaid months? Do you calculate the move out refund based on the days the number of days used or the number of days remaining in the billing period.

The following setup parameters will allow you to configure the move out function of Storage Commander V5 to meet your requirements.

## SETTING REFUND & PRORATE POLICIES



- **Refund Any Prepaid Balance**

Rent payments that are entered into the system prior to rent being charged are considered a Pre-Payment. An example of this would be where a customer pays in advance for rent in order to qualify for a special discount. With this feature selected Storage Commander V5 will refund the pre-paid rent (allowing for any discounts) at the time of move-out.

If this feature is not selected, no pre-paid money will be refunded to the customer at the time of move-out.

- **Prorate Current Period**

Many self storage facilities allow pre-paid rent to be refunded to the customer at move-out, but have restrictions on refunding rent within the current billing period. This is why Storage Commander V5 separates pre-paid rent refund policies from rent refund policies covering the current billing period. If this option is not selected (Prorate Options are grayed out), no refund for unused days left in the current billing period will be calculated. If however this option is selected (turned on) Storage Commander V5 will calculate a refund based on the criteria selected in this option.

- **Always Refund**

Calculates a refund for the current billing period (*based on the Prorate Calculation selection*), with no restrictions.

- **Don't refund if amount less than \$x,xx**

Will not give a refund if the customers balance is under the dollar value entered in this field.

- **Don't refund if xx Days Into The Current Period**

This function allows you to set the maximum number of days into a billing period a customer can progress before refunds are not allowed.

## PRORATE CALCULATION

The value of the prorated refund is based on how the prorate is calculated. The formula for determining the prorated refund is detailed below and is influenced by the **Prorate Method** which is setup under **Company Setup / Facilities / Options “Prorate Method”**. The section **Prorating Options** in this manual will give you detailed information on the prorating methods available to you.

- **Based On Un-Used Days**

This function adds the number of days remaining in the current billing period for the customer and multiplies the sum with the **daily rate** (*derived from the Prorate Method*) then divides the result by the rental rate of the unit (the rental rate will be a factor of the base rate of the unit less any discounts that are in affect at the time of the move-out)

Formula = number of days remaining x daily rate ÷ rental rate.

- **Based On Days Used**

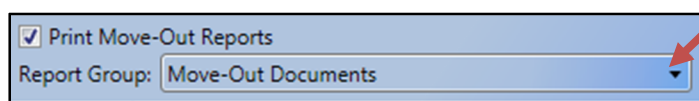
This function adds the number of days in the current billing period the customer has occupied the unit, multiplies the sum with the daily rate (derived from the Prorate Method) then divides the result by the rental rate of the unit (the rental rate will be a factor of the base rate of the unit less any discounts that are in affect at the time of the move-out)

Formula = number of days used x daily rate.

## MOVE OUT REPORT

When selected, this feature will automatically print a report group consisting of individual reports that you can associate with a move-out event. For information on creating a report group refer to the section “Reports” in this manual.

To select this feature click on **Print Move-Out Reports**, a check mark will appear in the box adjacent to the Print Move-Out Reports title, signifying that this feature has been activated.



To select a report group to associate with move-out events, click on the down arrow in the Report Group field box and select the report group from the list of available report groups.

## Miscellaneous

The Miscellaneous section of the Billing Plan allows you to select what late group will be associated with this plan as well as what NSF charge will be used (you can even apply additional charges that will be associated with a NSF process), fees and/or discounts can be automatically applied to a customer's account during a Transfer or Reservation.

To attach a late group to a billing plan it must have been previously created. To create Late Groups go to the section Creating Late Groups in this manual.

To attach Fees, Discounts or Deposits to a billing plan they must have been previously created. To create Fees, Discounts or Deposits, go to the sections Creating Fees, Creating Discounts, Creating Deposits in this manual.

Miscellaneous		
Late Group:	Empower Storage	
NSF Charges:	NSF Fee	(\$10.00)
	NSF Processing Fee	(\$5.00)
Auto Apply For Transfers:	Unit Transfer Fee	(\$15.00)
Auto Apply For Reservations:	Reservation Deposit	(\$25.00)

- **Late Group**

Click on the down arrow in the “Late Group” field to display a list of available late groups. To select the late group for this billing plan, locate it in the list and click on it.

- **NSF Charges**

To have Storage Commander automatically apply a NSF fee or additional fees (some facility operators will charge a

processing fee in addition to the NSF fee), click on the **New** button to open the Fee & Discount list box, scroll down to the Fees section and select the fee to post to an account for a returned check event. Repeat this process if additional fees are used for a NSF event.

- **Auto Apply For Transfers**

Fees or discounts can be automatically applied to a customer's account when they transfer to another unit. To add a fee or discount click on the **New** button to open the Fee & Discount list box, scroll down to the Fees section and select the fee to post to an account for a unit transfer event. Repeat this process if additional fees are used for this event.

- **Auto Apply For Reservations**

When reserving a unit for a customer Storage Commander V5 can be configured to automatically apply a reservation deposit. To set this function up, click on the New button and select the deposit from the list of available deposits. We recommend that you create a special “Reservation” billing plan, and use this when reserving a unit.

### Deleting (Removing) Entries

To delete entries from the NSF, Transfers or Reservation list, select the item to be deleted from each list and click on the Delete button to remove it from the list.

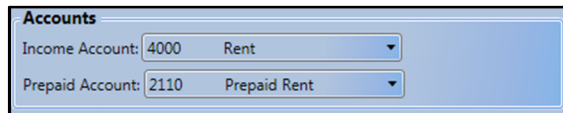
**Note.** Adding or Deleting items from a list modifies the billing plan, and as such you must re-assign the billing plan to the facilities that are using it.

# Accounts

## ESTABLISHING INCOME AND PREPAID ACCOUNTS

Once a billing plan has been developed the last step is to assign the revenue generated from this plan to an account number from the chart of accounts. Once assigned Storage Commander V5 provide you with reports detailing revenue against general ledger account numbers used by your corporate accounting system.

Income and Prepaid accounts must be established in the General Ledger first. To setup these accounts please refer to the General Ledger section of this manual.



The screenshot shows a window titled "Accounts" with two fields. The "Income Account" field is set to "4000" with a dropdown menu showing "Rent". The "Prepaid Account" field is set to "2110" with a dropdown menu showing "Prepaid Rent".

### Income Account:

To assign rent payments to your income account, click on the down arrow in the Income Account field and select the account number you have setup for rental income

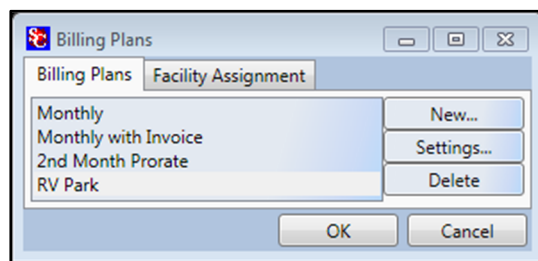
### Prepaid Account:

Click on the down arrow in the Prepaid Account field and select the account number you have setup for prepaid rent income

*Prepaid rent is any rent payment that is entered into the system before rent is charged*

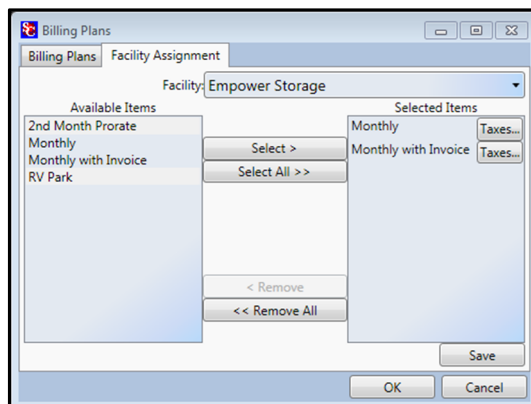
## ASSIGNING BILLING PLANS TO A FACILITY

To assign newly created billing plans or existing billing plans that have been modified to a facility, click on the Billing Plans button under the Accounting section, to open the Billing Plans window.



The screenshot shows the "Billing Plans" window with the "Facility Assignment" tab selected. It lists billing plans: "Monthly", "Monthly with Invoice", "2nd Month Prorate", and "RV Park". There are buttons for "New...", "Settings...", "Delete", "OK", and "Cancel".

Click on the Facility Assignment tab to open the facility assignment window.

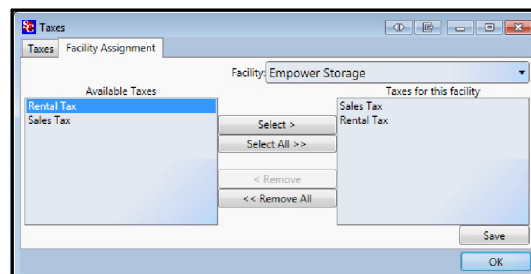


The screenshot shows the "Billing Plans" window with the "Facility Assignment" tab selected. The "Facility" field is set to "Empower Storage". The "Available Items" list box contains "2nd Month Prorate", "Monthly", "Monthly with Invoice", and "RV Park". The "Selected Items" list box contains "Monthly" and "Monthly with Invoice". There are buttons for "Select >", "Select All >>", "< Remove", "<< Remove All", "Save", "OK", and "Cancel".

In the Facility field click on the down arrow to see a list of available facilities. Select the facility that you will be assigning this billing plan to. The selected facility should now be listed in the **Facilities** field.

In the Available Items list box click the billing plan to be assigned to the facility shown in the Facilities field. Click on the **Select** button to copy the billing plan into the **Selected Items** list box. Click on the **Save** button

If rental tax is required for this facility click on the **Taxes** button to open the **Tax Assignment** window. Select the Tax to be assigned to this billing plan, and click on the **Select** button to copy the tax item from the **Tax Available** box into the **Tax Applied** box.



The screenshot shows the "Taxes" window with the "Facility Assignment" tab selected. The "Facility" field is set to "Empower Storage". The "Available Taxes" list box contains "Rental Tax" and "Sales Tax". The "Taxes for this facility" list box contains "Sales Tax" and "Rental Tax". There are buttons for "Select >", "Select All >>", "< Remove", "<< Remove All", "Save", "OK", and "Cancel".

You can repeat this process if more than one tax is to be associated with a billing plan.

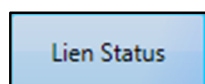
When all tax plans have been copied into the Taxes Applied box, click on the **OK** button to copy and save the tax plan(s) into the billing plan.

To create new tax items or to modify existing tax items, refer to **Creating Tax Items** in this manual.

## Creating Late Groups

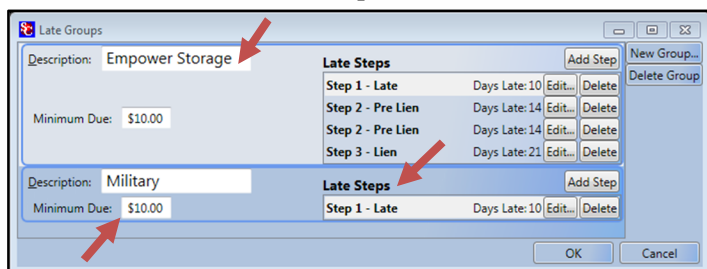
Late groups contain the configuration you use to move a customer through the late processes and ultimately to auction. In this configuration you will establish when late steps are posted to a customer's unit, fees to be charged, what notice will be generated, and limit access to the customer's storage unit.

There are no limits on the number of late groups that can be assigned to a single facility. With the ability to use more than one late group at a facility you now have the flexibility to assign one late group for regular customers, while assigning a different late group for military customers, or even another late group for business customers.



To setup a late group, click on the **Lien Status** button under the **Accounting** section of the **Configuration Manager**.

This will open the **Late Groups** window listing all late groups currently available. Click on the **New Group** button to start the process of creating a new late group.



Clicking on the New Group button will create a new late group with a default name of "**Late Group**" in the *Description* field. A Late Step named "**Step 1 – Late**" will also be created. In this illustration I renamed the description from "Late Group" to "Military" by clicking in

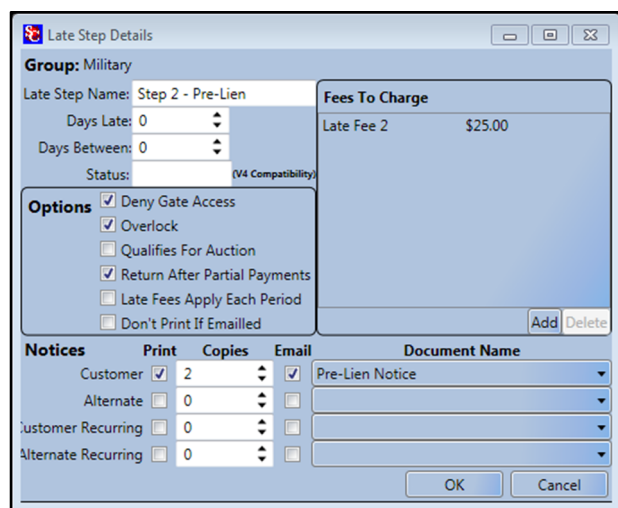
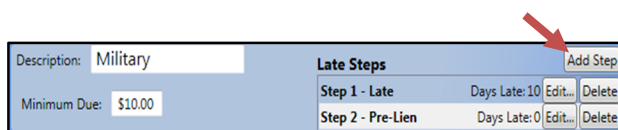
the description field, deleting the default name (Late Group) and entering the new name (**Military**).

Now enter the Minimum Due amount that will required to be placed into any late step. Entering a value for minimum due will cause Storage Commander V5 to evaluate a customer who may qualify to be placed into a late step based on the number of days late *and* have a minimum amount due on their unit. If a value of \$0.00 is used as the minimum due, customers will be placed into late steps based solely on the number of days late.

## Configuring a Late Step.

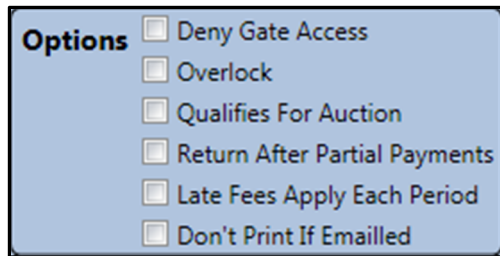
### ADDING A LATE STEP

To start the process of adding a new late step into an existing late group, click on the **Add Step** button of the late group to open the Late Step Details



- **Late Step Name:**  
Enter the name that will be used to identify the late step in the notices and reports.
- **Days Late:**  
Enter the number of days from the day rent was charged a customer is given before being placed into this late step.
- **Days Between**  
Enter the number of days between this late step and the previous late step
- **Status**  
This field for the late status id field used in the older V4 Storage Commander version.

## Options



### ☒ **Deny Gate Access**

Disables customers gate code when placed into this late step.

### ☒ **Overlock**

Adds customer to overlock report and To Do List on the Quick View Screen.

### ☒ **Qualifies For Auction**

Typically assigned at notice of sale late step, this function allows the manager at the site to see a list of customers who are qualified to have their property sold in auction.

### ☒ **Return After Partial Payment**

It is recommended that this function is enabled in the Pre-Lien step. When selected Storage Commander V5 will watch for partial payments that are being processed on units that are in a late step that is beyond the Pre-Lien late step (or whatever late step you have chosen for this function), if it detects a partial payment is being made on a unit that is past the Pre-Lien step it will return the unit to the Pre-Lien step, and apply the pre-lien fee to the payment transaction. In affect this will restart the lien process on the unit.

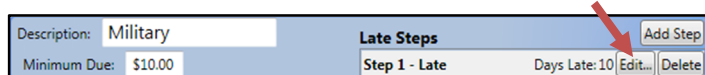
### ☒ **Late Fee Applies Each Period**

It is recommended that this option be enabled on the first late step that is associated with a late fee. What this option does is allow Storage Commander to re-apply the associated late step to a unit each month that the unit is late. An example: A unit is charged rent on May 1<sup>st</sup> because no payment had been received, the unit moves into the first late step (Step 1 – Late) on May 10<sup>th</sup>, again no payment is received so the unit moves into the next late step (Step 2 – Pre-Lien) on the pre assigned 18<sup>th</sup> day (May 18<sup>th</sup>), once again no rent is received, so on June 10<sup>th</sup> the unit is again *charged* the Step 1 – Late fee but remains in the Step 2 Pre-Lien late step and will continue through all other late steps according to their assignment in the late group, with the Step 1 fee being charged on the 10<sup>th</sup> of each month.

### ☒ **Don't Print If Emailed**

Restricts printing of late notices if they were emailed.

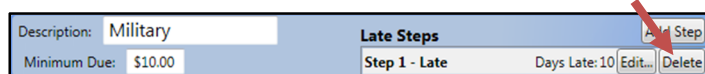
## EDITING A LATE STEP



The screenshot shows a window titled 'Late Steps' with a description of 'Military' and a minimum due date of '\$10.00'. It lists 'Step 1 - Late' with 'Days Late: 10'. The 'Edit...' button is highlighted with a red arrow.

To edit an existing late step, click on the **Edit** button of the late step to be edited. Make whatever changes are needed and click on the OK button to save the changes and return to the Late Group window

## DELETING A LATE STEP

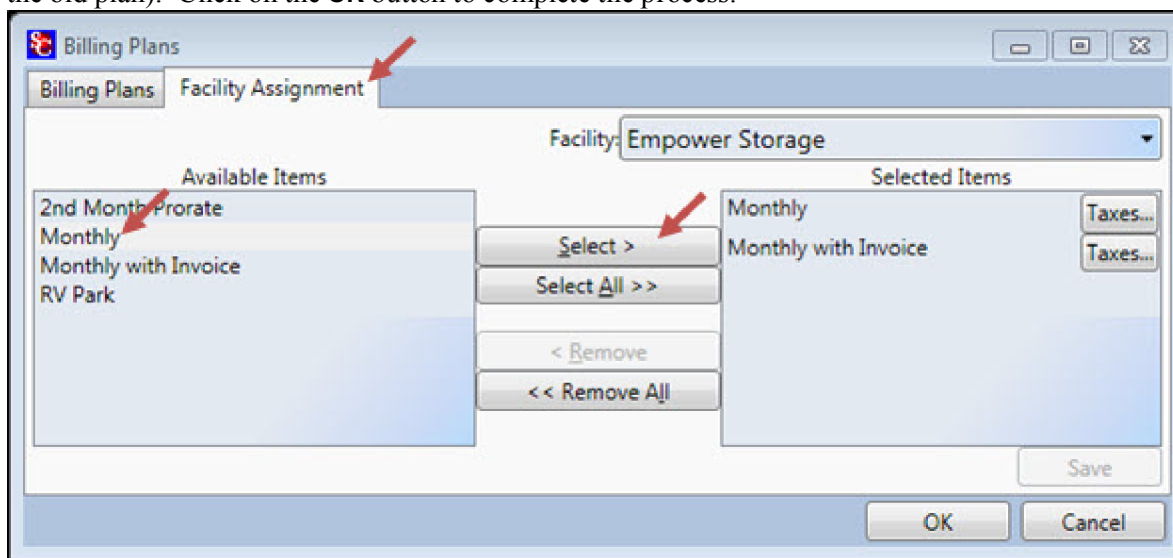


The screenshot shows the same 'Late Steps' window as above. The 'Delete' button is highlighted with a red arrow.

To delete an existing late step, click on the **Delete** button of the late step to be deleted and click on the OK button to save the changes and return to the Late Group window

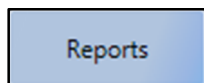
*Note: A Late Groups is a component of a Billing Plan, any additions or changes that are made to late groups will not be available at the storage facility until the billing plan that contains the late group is sent to the facility. To activate a new late step at a facility or to update an existing late step at a facility, follow the steps listed below:*

In the **Accounting** section of the **Configuration Manager** opening screen, click on the **Billing Plans** button. Click on the **Facilities Assignment** tab to open the facility assignment screen. In the Facility field, click on the down arrow to select the facility to send this billing plan to. Now select the billing plan that contains the late group that was modified. Even though the billing plan may already be listed in the Selected items list box, click on the Select button to move the billing plan containing the modified (or new) late group over to the Selected Items list box (if the billing plan is already in the Selected Items list the modified billing plan will overwrite the old plan). Click on the **OK** button to complete the process.



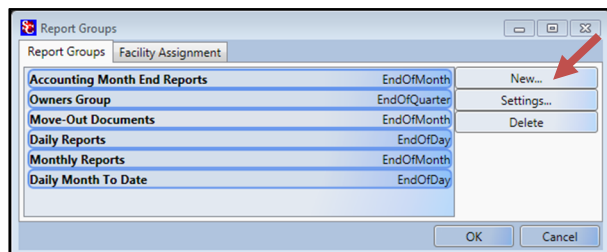
The screenshot shows the 'Billing Plans' window with the 'Facilities Assignment' tab selected. The 'Facility' dropdown is set to 'Empower Storage'. The 'Available Items' list on the left contains '2nd Month Prorate', 'Monthly', 'Monthly with Invoice', and 'RV Park'. The 'Selected Items' list on the right contains 'Monthly' and 'Monthly with Invoice'. A red arrow points to the 'Select >' button, which has been used to move 'Monthly with Invoice' from the available items to the selected items. Other buttons include 'Select All >>', '< Remove', '<< Remove All', 'Save', 'OK', and 'Cancel'.

# Report Groups



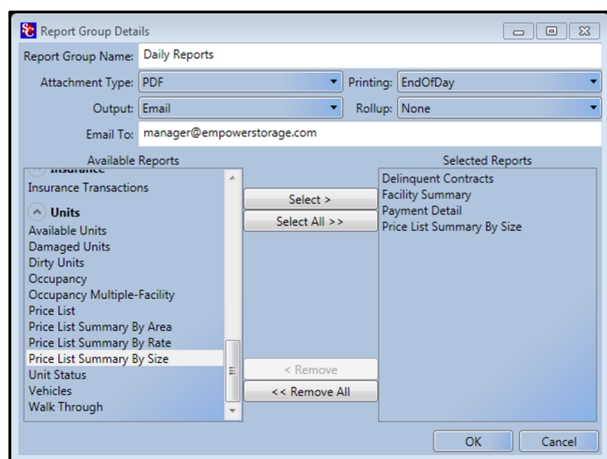
Report Groups give you the ability to create customized packets of reports that can be configured to automatically printed, emailed or printed and emailed covering specific periods of time. There are no restrictions on how many report groups that can be assigned to a facility (for example: at month end you could have a report group that is printed at the facility, with another report group that is email to your accounting firm and maybe a third group that is emailed to the facilities owner).

## CREATING A REPORT GROUP



In the Report Group window you have the option of creating a new report group by clicking on the **New** button, editing an existing report group by clicking on the report group name followed by clicking on the **Settings** button, or deleting a report group by clicking on the report group name followed by clicking on **Delete**.

When creating a new report group or changing an existing one, the new report group or the modified report group will not be available to the facility until they have been assigned to the facility through the Facility Assignment process.



Position the mouse in the **Report Group Name**: field and enter a name for the report group.

Click on the down arrow in the **Attachment Type** field and select the file type the reports in the report group will be created under. The supports formats are PDF, HTML, or Excel.

In the **Printing**: field select the occurrence/date range for the report group. Date ranges include Daily, Weekly, Monthly, Quarterly, and Yearly.

The **Output** field allows you to select emailing of the report group, printing of the report group, or both.

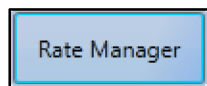
**Rollup** allows reports to show daily activity on a month to date bases or on a year to date bases.

In the **Email To**: field, enter the email address to be used when emailing a report group.

### Selecting Reports

The **Available Reports** list box contains all of the reports available in the Storage Commander V5 program. The available reports are divided into sections: Accounting, Analysis, Contact, Contract, Insurance and Units. Each section can be expanded (showing all reports in that section) or collapsed (only showing the section heading). Clicking on a report will highlight the selected report. Once highlighted, clicking on the **Select** button will copy the report into the **Selected Reports** list box. To remove a report from the Selected Reports list box, select the report to be removed and click on the **Remove** button.

# Rate Management



The Rate Management system used in Storage Commander V5 is an extremely powerful feature that allows you to automatically control the rental rates at your facility based on multiple “Trigger Points” that are defined by you. When units meet any one of these Trigger Points the rate for the associated units are changed to meet the pre-defined new rate.

## RATE MANAGER TRIGGER POINTS

The associated Rate Management Trigger Points are defined as follows:

- Size**..... Change rate based on unit/space size
- Percentage**..... Change rate based on the percentage of units rented of the **SIZE** selected
- Available Count** ..... Change rate based on the number of Available units of the Size selected
- Start/End Month-Day** .. Change rate based on the Size selected within a date range
- Day Of Week** ..... Change rate based on specific Day(s) of the week or specific days(s) of the week within a specified date range

## CREATING A RATE MANAGEMENT ITEM

Click on the Rate Management button in the Storage Commander V5 Configuration Management opening screen. This will open the Rate Management setup screen. If you have more than one facility, locate the facility that you will be creating a rate management item for by clicking on the down arrow at the end (right side) of the current facility field.

Once you have selected the facility click on the **New Item** button to open a rate management setup item. Configure the Rate Management item using the trigger points listed above. Click on the **Save Changes** button to save the new rate management item and load it to the facility.

Current Facility Name  
Click on the down arrow to open a list of all installed facilities

Active Rate Management Items

Click on the **New Item** to open a rate management configuration box.

Click on **Save Changes** to add to Active Rate Management items

Click on the down arrow to open a list of all installed facilities

Click on the **Delete** button to remove the Rate Management item from all facilities

Current unit status of active rate management item

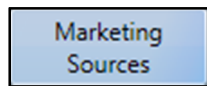
In the above example, a rate management item is being configured to increase the rental rate on RV Parking spaces **15%** when the occupancy reaches **90%**. This increase will only take effect in **December** and **January** and is further limited to occurring on **Friday's, Saturday's & Sunday's** within the defined months. The rate on the RV spaces will return to the normal street rate when any of the trigger points are not met.

Active Rate Management items can be reviewed in the Rate Management Activity report.

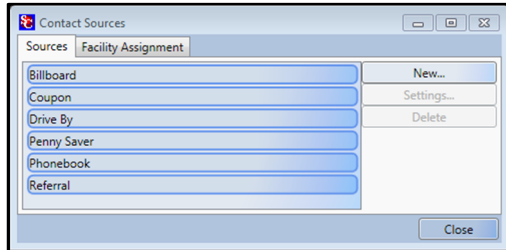
# Contact Data

Setup contact information to track rental inquiries, move-in decisions, move-out decisions and customer demographics.

## MARKETING SOURCES



To create a Marketing Source that will be used to track customer demographics, click on the **Marketing Sources** button in the **Contact Data** section. This will open the Contact Sources window where you will see marketing sources that have been previously created.

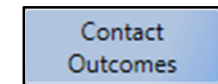


Click on the **New** button and enter the name of the marketing source. Click on **OK** to save the new marketing source.

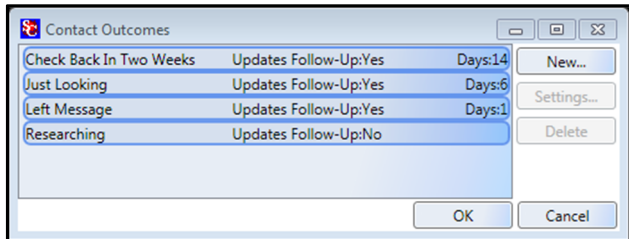
To change the name of a current marketing source, click on the marketing source to be changed followed by clicking on the Settings button. Delete the current name and enter the new name, click on the OK button to save the changes and return to the Contact Sources window. The new name should now be in the list.

To delete an entry in the Contact Sources list, click on the source to be deleted followed by clicking on the Delete button.

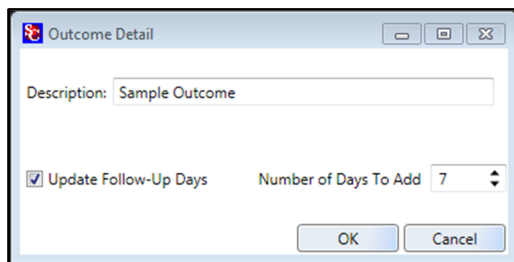
## CONTACT ACTIONS



Contact Actions gives you the ability to quantify and separate into groups specific follow-up actions that you require your on-site manager to perform for customers who have expressed an interest in renting a storage space at your facility. From here you can create unique contact action groups and assign a follow-up schedule for each group. that will be displayed within the Contact List of the Quick View window in the Storage Commander V5 program.



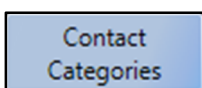
Opening the Contact Actions window will display a list of open contacts and their current status. Double clicking on a contact or single clicking on a contact and selecting Settings will allow editing of the contact details.



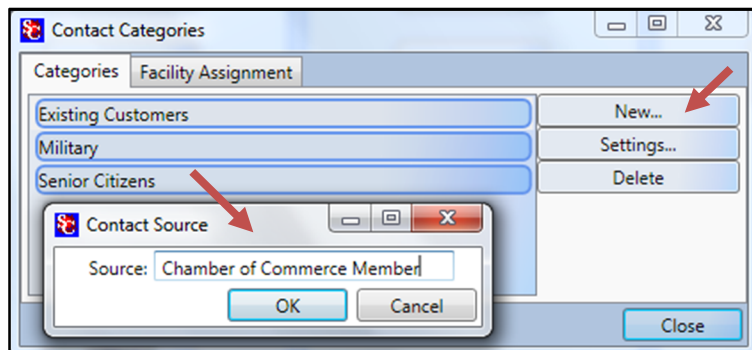
To create a new contact action item click on the **New** button in the **Contact Actions** window, this will open the **Action Detail** window. Enter the description / name of the contact action item. To assign a follow-up schedule to this action item select Update Follow-Up Days and enter the number of days after the contact has been entered, for a follow-up reminder to be displayed in the Storage Commander V5 Quick View window.

New Contact Action groups as well as Contact Action groups that have been edited, are automatically updated to all facilities running the Storage Commander V5 management program

## CONTACT CATEGORIES



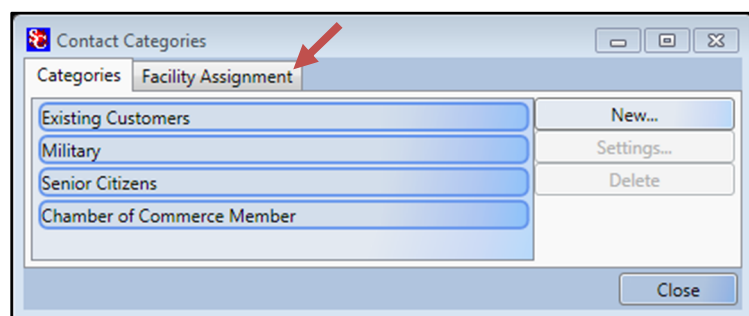
Contact Categories allows you to create categories (such as; Military, Senior Citizen, Government) and assign potential customer to a specific category. This information will be broken down in the Contacts reports and on the Charts / Gauges screen.



To create a new contact category click on the **New** button and enter the name of the category in the Source: field. Click on the OK button to save the entree and add the new category to the categories list.

## ASSIGNING CONTACT CATEGORIES TO A FACILITY

To assign newly created contact categories or to edit existing contact categories, click on the Contact Categories button located under the Contact Data section and click on the **Facility Assignment** tab to open the facility assignment window.



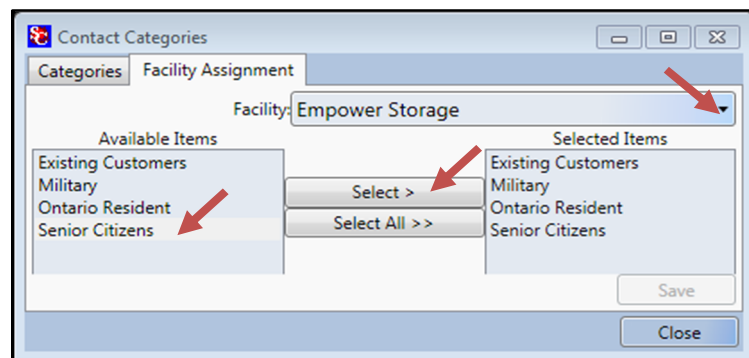
In the Facility field click on the down arrow to see a list of available facilities. Select the facility that you will be assigning this contact category to. The selected facility should now be listed in the **Facilities** field.

In the Available Items list box click the contact category to be assigned to the facility shown in the Facilities field.

Click on the **Select** button to copy the

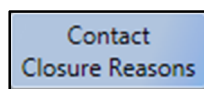
contact category into the **Selected Items** list box. Click on the **Save** button.

This contact category item will now be available in the selected facility during a Move-In under the Billing Detail / Reason For Renting.

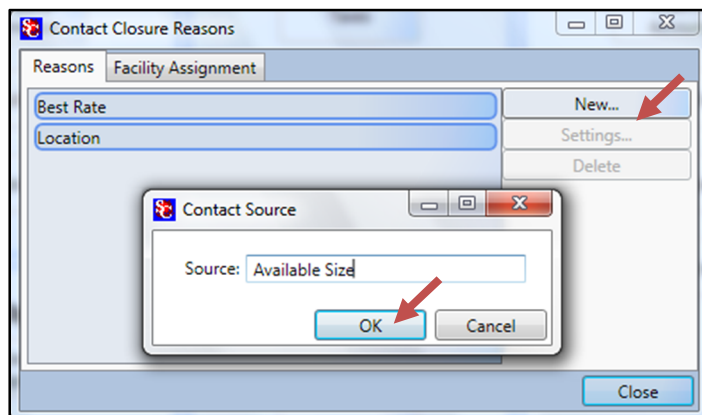


## CONTACT CLOSURE REASONS

Track customers by their rental decision.

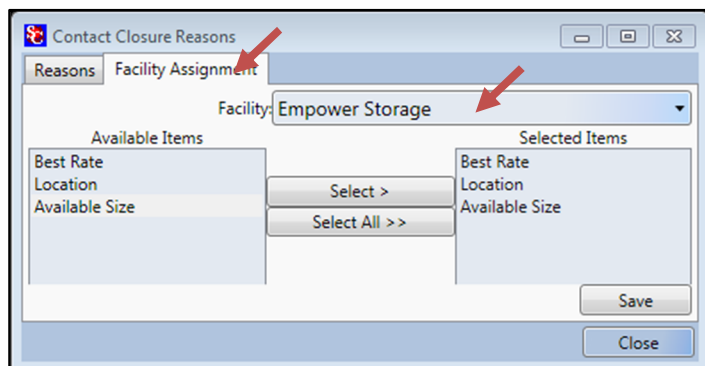


With this function you can create specific categories that are associated with customer's decision to rent storage space at your facility. During the move in process you can assign customers to the category that best fits their renting decision. This information will be broken down in the Contacts reports and on the Charts / Gauges screen.



### Creating a new Contact Closure Reason

To create a new rental decision category, select **CONTACT CLOSURE REASONS** from the Contact Data section of the Configuration Manager main screen. Click on the New button and enter a name for the new rental decision, click on the OK button to save and display the new entry in the list box.



### Adding a new Contact Closure Reason to a facility





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