



Storage Commander

FAQ's

History

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PAYMENTS

1. HOW TO MAKE A PAYMENT?

There are five (5) ways to process a payment on a customer account. You can select from any of the 5 methods that you feel most comfortable with. All 5 methods work the same way and will deliver the same result. Payments can be processed in several different ways depending on user preference. Regardless of the payment method used. The Storage Commander **payment function** supports **Cash, Check, Credit Card & Debit Card payments**. Payments can be posted to an account to pay for past due balances, as a pre-pay credit or as a partial payment.

- a. Click on the **Payment icon** in the Toolbar and select the customer from the Contacts list.
- b. Click on the **Activities** drop down menu item located at the top of the Storage Commander main screen and select **Payment** from the list.
- c. The **Customers / Units screen** is split into two sections Rental Units and Contracts (Customers). A payment can be initiated by either double clicking on an occupied unit under the **Rental Units** column, which will open the **Payments Options** screen, or by double clicking on a customer under the **Contracts** column, which will open the
- d. **Contract Details screen**, click on the **Activities** button followed by the **Make A Payment** button to open the **Payment Options** screen.
- e. To use the **site map** for processing a rent payment, locate the customers unit on the site map and double click on it to bring up the **Payment Options** screen.

NOTE: If the customer is **past due**, the **Quick View** screen will list all customers who are in a late or past due status. To make a payment on a customer through this screen, double click on the customer name to open the Contract Details screen. From the Contract Details screen click on the **Activities** button, now click on the **Make A Payment** button.

2. HOW TO MAKE A MULTI-UNIT PAYMENT?

- a. Selecting a customer who has multiple units that have been linked together, will bring up the **Multi-Unit payment selection screen**, displaying all units that are associated (linked) to this customers account. You can select individual units, or multiple units (by clicking on each unit while holding the **Ctrl** key down), you can also select all units by clicking on the **Select All** button. Clicking on a highlighted unit (previously selected unit) will de-select the unit from the payment process., clicking on the **Clear All** button will de-select all units from the payment process and disable the **OK** button. Once you have selected the units for payment click on the **OK** button to proceed to the **Payment Options screen**.

3. HOW TO MAKE A PARTIAL PAYMENT?

- a. To process a partial payment (a payment being made for less than the balance on the account), from the **Accept Payment** window enter the amount to be applied to the account into the **Amount** field. When the amount of the partial payment has been entered, the payment summary section will show the total payment being made and the new balance due on the account.

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

4. HOW TO MAKE A SPLIT PAYMENT?

Click on the check box next to the first payment type **Cash, Check, Credit or Debit**, enter the amount being made with that payment type. Click on the check next to the other payment type and the field will automatically be filled in with the payment balance that was calculated after the previous payment type.

5. HOW TO TAKE A \$0 DOLLAR PAYMENT?

To make a payment on a current customer account please refer to #1 (How to make a payment).

To make a payment during the move-in process, the billing screen is where all the elements of the move-in come together. From this screen you will assign a **Billing Plan, Gate Access code and Lease Number** (if you use lease numbers) to the new customer, as well as add **Fees, Discounts, Services, and Deposits** to the new account.

- 1.) Review the information on the **Billing Details Page** and verify all elements (Including discounts and fees) of the transaction are added and correct. In order to take a \$0 payment properly, **be sure not to increase the number of payments**. The payment should reflect **"1"**.
- 2.) When proceeding to the **Accept Payment Page**, **do not** check the box for Cash, Check, or CC, but rather, just click **finish**.

Storage Commander will prompt you asking, if you want to move them in without collecting a payment, in which case you click yes to proceed to the receipt window.

6. HOW TO ENROLL A CUSTOMER INTO AUTOMATIC PAYMENT?

Storage Commander V5 can be configured to automatically process credit card or ACH check payments when rent is charged.

- a. To enroll a customer into Automatic Payment from the **Accept Payment Screen** click the check box next to Enroll Automatic Payment.

7. HOW TO ENROLL A CUSTOMER INTO AUTOMATIC PAYMENT WITHOUT CHARGING THE CUSTOMER?

- a. To enroll a customer into **Automatic Payment** without charging that card. From the **Customer Contract Details Page** click on the **Auto Payment drop down** and select **Credit Card**. Enter the Credit Card information manually or scan the card and select **OK**.

8. HOW TO SELL MERCHANDISE?

Merchandise items, such as Boxes, locks, Shipping Tape, Bubble Wrap... can be inventoried and sold directly through a customer account, or through the **Merchandise Icon** in the tool bar for non-customers (street sales). When a merchandise item is sold, it is removed from inventory decrementing the inventory count for the item sold. Reports within the Storage Commander

program will itemize merchandise sales activity and generate re-order reports when inventory items reach a pre-defined re-order level.

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

- a. Select the item to be sold. Click on the **Add to Cart**, to place the selected item into the Shopping Cart. Click next to proceed to the Accept Payment Screen.
- b. Merchandise sales can be included during a rent payment by clicking on the Merchandise tab in the Payment window.
Select the merchandise items using the same method as described in the “Selling Merchandise Street Sales”.
When the merchandise items have been selected, proceed through the **Payment Options** and **Accept Payment**, screens to complete the rent payment and merchandise sale.
- c. Selling merchandise through a customer account **without charging rent**. This procedure only applies to customers who are current (account balance is \$0.00) In the Payment Options screen set the Number of Payments to 0. Select the **Merchandise tab** and proceed to add merchandise to the sales transaction

9. HOW TO RECEIVE MERCHANDISE?

- a. To receive inventory in to a facility, click on the **Activities** drop down menu item located in the top task bar, and select **Merchandise / Receive Inventory**.
Select the merchandise item(s) that you are receiving into inventory.
Click on the **Add to Inventory** button and enter the number of items into the **Qty In Cart** box.
Click on the **OK** button to complete the process.

SETUP EXISTING CUSTOMER

10. HOW TO SET UP EXSISTING CONTRACTS?

For facilities that already have tenants but need to enter them into Storage Commander the Setup Existing Contract.

- a. To add a customer to **Setup Existing Contract**, click on the **Activities** tab and open the associated items for the selected tab. Select Setup Existing Contract. This will take you to the **Move-in** window. Select the customers unit and enter customer information.
- b. Review the information on the **Billing Details Page**, and enter the correct **Move-In** date.
- c. Under **Initial Balances**, select **Add Items**. If the customer has already paid, change the balance to \$0. This will show that the customer is up to date on their payment and will reflect the correct **Paid Through Date**.
- d. If merchandise, fees, discounts, or services need to be added, Select the **Add Item** Icon under **Initial Balances**. Verify the fee is correct and select Finish.

11. HOW TO ENTER PREVIOUS TRANSACTIONS?

For facilities that need to enter Previous Transactions that were processed in their old software during conversion to Storage Commander, will need to enter the payment as a Previous Transaction.

- a. From the Payment Screen select the customers contract.
- b. Select the Payment Options Tab to verify the amount being paid.
- c. Select the Accept Payment Tab and choose the payment type (Cash, Check, Credit Card, Debit Card)
- d. Enter the amount paid and select Finish.
- e. **NOTE:** If the customer made a Credit Card or Debit Card Payment the approval code and expiration date is required to complete the transaction. Please collect that payment from the previous software before proceeding.

DISCOUNTS AND FEES

12. HOW TO ADD DISCOUNTS?

- a. To add a discount from the **Payments Page**, click on the **Tab** corresponding to **Fees, Discounts, Services and Discounts** to open a list of associated items for the selected tab. Select an item by clicking on the **Add** button to the right of the item. Once selected the item will appear in the **Applied to Contract** window. Clicking on the **Calculate** button will add the items to the Contract window.

13. HOW TO ADD A RECURRING FEE?

- a. To add a recurring fee to a customer's contract, open the customer contract details page and locate the recurring fees section and select the Settings Icon. Select the recurring fee and click Add. Select OK to save.

REVERSALS AND ADJUSTMENTS

14. HOW TO REVERSE A PAYMENT?

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

- a. From the **Customer/Units** screen double click on the customer in the **Contacts** section. In the left margin locate and click on the **Ledger/History** button. Locate the payment to be reversed and select the Reverse icon and select **OK** at the prompt to proceed.

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

15. HOW TO REVERSE A MOVE-IN?

The **Reverse Move-In** Function allows you to reverse a move-in within the day (before the **End of Day** process) the move-in payment was entered, providing the following conditions are met.

- 1.) The Reverse Move-in function is run **prior to** running **End of Day**.
You cannot initiate a Reverse Move-in after End of Day has run.
- 2.) The Reverse Move-in function is run **prior to** any other transaction on the account.

- 3.) The Reverse Move-in function in and of itself cannot be reversed.

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

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

16. HOW TO REVERSE A MOVE-OUT?

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

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

Inactive (moved-out) customers will be displayed in the contracts list with a **horizontal line** through their name. To initiate the Reverse Move-Out process left click on the customer name to open their **Contract Details** screen. Left click on the **Ledger/History** tab and scroll down to the **Move Out** transaction item, position the mouse over the Move Out transaction item and **Right click**, select **Reverse Transaction** a message will appear requesting conformation for the reverse move out. Select **Yes** to complete the reverse move out or **Cancel** to stop the process. The customer will be returned to the same late status and will maintain the same account balance as they did prior to the move-out.

NOTE: If a payment was made during the move-out process the payment will automatically be reversed and removed from all financial reports, with exception of the **Reversed Transaction** report.

17. HOW TO MAKE AN ADJUSTMENT?

The **Adjustment** function allows changes to be made to balances on a customer account.

- a. Adjustments can be initiated through the **Adjustment Icon** or by right clicking on a customer's name and selecting **Details | Activities | Adjustment**. Once an account has been selected the **Adjustment** screen will open. From here you will see a list of all account types that have a current balance (\$0 balances on account items will not be included in the **Past Due Items** list).
 - i. To reduce the balance on **past due items**, select the item and enter the offset amount into the corresponding field.
 - ii. To increase a balance to an **account adjustment** item, select the item and enter the amount of adjustment into the Adjustment Amount field.
 - iii. Enter an explanation for the adjustment and click on the Finish button to complete the adjustment.

18. IN THE ADJUSTMENTS WINDOW, WHAT IS THE DIFFERENCE BETWEEN PAST DUE ITEMS AND ACCOUNT ADJUSTMENTS?

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

Account Adjustments

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

REPORTS

19. HOW TO PULL REPORTS?

All reports are accessed from the **Reports Icon** on the tool bar. Once the **Reports Icon** has been selected the reports management window will open. From this window you can open and view reports by **selecting** the appropriate category and clicking on the **View** button associated with the report. Any number of reports can be opened at one time, when you select a report a tab will appear at the top of the reports window signifying the report has been opened.

Some of the more advanced features include: Ability to generate any report in the system on a facility customer rather than the entire facility. Span reports across multiple facilities. Perform a data search within a report. Export reports to different file formats, such as PDF, Excel, CSV as well as many other file formats.

20. WHAT ARE THE MOST POPULAR REPORTS?

- a. **Facility Summary Report** (under the **Analysis Drop Down**)
- b. **Super Summary** (under the **Analysis Drop Down**)
- c. **Payment Activity Report** (under the **Accounting Drop Down**)
- d. **Credit Card Detail Report** (under the **Accounting Drop Down**)
- e. **Aging Receivables Report** (under the **Accounting Drop Down**)
- f. **Move-Out Detail Report** (under the **Accounting Drop Down**)
- g. **Deposit Slip Report** (under the **Accounting Drop Down**)
- h. **Walk Through Report** (under the **Units Drop Down**)
- i. **Occupancy Report** (under **Units Drop Down**)
- j. **Contacts by Source Report** (under the **Contact Drop Down**)

END OF DAY & PENDING DOCUMENTS

21. HOW TO RUN END OF DAY?

Running **end of day** initiates many processes within the Storage Commander program, which include; charging rent, initiating Auto Credit Card & ACH payments, Late Notices, Late Fees, Report Groups, as well as system level routines. The advanced functionality built in to our end of day process allows you to run end of day while using the Storage Commander Management system. In other words, you can start the end of day process, let it run in the background while you continue to take payments, move-in, move-out, or any other management function while the end of day is running.

- a. To start the **End of Day** process, click on the **End of Day icon** in the tool bar. The program will automatically select the Windows default printer and let you know if it is Ready or Off-Line. If you would rather use a different printer, click on the Select button and select a printer from the list of available printers.
 - i. When initiating the end of day process, you have the option to include specific functions to run as part of the end of day procedure:
 1. Process Auto Charges when **End of Day** completes.
 - Allow auto credit card & ACH charges to occur automatically during the EOD process.
 2. Print Generated Notices When **End of Day** Completes.
 - Print notices (such as late notices) automatically during the EOD process.
 3. Email Statements.
 - Email statements (invoices) automatically during the EOD process.
 4. Report Printer.
 - When printing documents produced during the **End of Day process**, you can use the Windows system default printer or you can select from any other printer that has been installed on the computer the is running the **End of Day process**, even if the printer is a networked printer printing at another location. To select a printer, click on the Select button to open the Windows Printer selection window, and select the desired printer from the list.
 - b. **Auto End of Day**: The cloud-based version of Storage Commander can be configured to automatically run End of Day each night after midnight. Using this feature eliminates the need for the on-site manager to run **End of Day** manually, and provides the following enhancements:
 - i. Runs End of Day automatically every day 365 days a year, keeping your accounts up to date.
 - c. Allows Online payments, Move In, Move Out, & Reservations to be posted to an account after business hours.
 - d. Notices are generated and placed in the Documents queue for the manager to review and print/email when they open the office in the morning.
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NOTE: When starting Storage Commander, the program will automatically detect if the end of day routine is up to date. If it detects that the Storage Commander system is not up to date it will display a message box similar to the example below informing you that the facilities management system is not current and has not been current for the number of days indicated within the message box. If this occurs you will be asked to bring the management system

22. HOW TO PRINT NOTICES AND VIEW PENDING DOCUMENTS?

During the **End of Day Process**, notices (such as: late notices and invoices) are **generated** and passed to the **Pending Documents** folder where you can review and select the documents prior to printing or emailing. Notices will remain in the Pending Documents folder until they are processed or cleared from the list.

- a. To select individual customers, click on the check box adjacent to the customer name.
- b. To select all customers attached to a specific notice, click on the check box next to the notice.

NOTE: You can review and reprint any notice that has been generated over the past 30 days (even if the document or notice has been processed) by selecting the **Documents Icon** and clicking on the **Show Last 30 Days** check box located at the bottom of the Pending Documents screen.

23. HOW TO MANUALLY GENERATE A DOCUMENT?

To manually generate a notice (such as late notice), click on the **Activities drop down** menu item and select **Generate Documents**. This will open the **Generate Notices** window, select the customer by locating the customer in the **Contracts** column. Once the customer (or customers) have been selected locate the notice to be generated from the **Notices** column. The selected notice will be automatically populated with the customers current balances and transaction dates. You can preview the notice by clicking on the **Generate Notice** button and selecting **View** located to the right of the customer name. To print, or email the notice **select** the customer by clicking on the check box next to the customer name followed by selecting the appropriate **Print**, or **Email** button at the bottom of the screen.

24. HOW TO CREATE A NOTICE?

To view, edit or create any of the notices, click on the **Notices** button located in the **Configuration Manager** under the **Company Setup box**. This will open the editor window where you can view a notice or if necessary, edit or create a new notice or letter.

- a. To **Create a Notice**, click on the File drop 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). 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.
- b. **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

TEXT MESSAGES

25. HOW TO CREATE A TEXT MESSAGE?

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

- a. Open the **TEXT MESSAGES** screen from the **COMPANY SETUP** section of the **Configuration Manager**.
- b. Click the “New” button on the toolbar to create a new Text Message. Use the Category and Name fields to help sort and select your messages.
- c. Enter the text message keeping in mind that these messages should be brief and limited to 160 characters or less. Long message will be broken into multiple text message and incur additional cost. Merge codes can be used to automatically insert customer specific data into the text message. Once the message is complete, click the “**Save**” button to save your changes.

26. HOW TO SEND A TEXT MESSAGE?

To Send a text message using the “Generate Documents” window.

- a. Click on the **Activities** drop down menu and select **Generate Documents** from the menu items. You can select individual customers from the list by clicking on the check box adjacent to the customer name. To select all customers, click on the **Select All** button at the bottom of the customer list.

To send a text message through a customer account.

- a. Text messages can be sent directly from a customer’s account by left clicking on the unit (if in the site map) or left clicking on the customer name if in the Quick View or Customer/Unit screen, and selecting **Send Text Message**. This will open the Send Text Message dialog box, from here click in the Text Message box to display all available text messages. Click on the appropriate message and select **Send**.

For more detailed information please refer to the **Storage Commander V5 Manual**.

GETTING SUPPORT FROM STORAGE COMMANDER

We're available to help you with any questions that you might have with using Storage Commander. Our software comes with technical support that is available from 7:00am to 5:00pm Monday through Friday **PST**, and Saturdays from 7:00am to 3:30pm **PST**.

General Support for Storage Commander:

Technical Support: 951-301-1187

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For additional information and resources please visit our website at:

www.storagecommander.com
