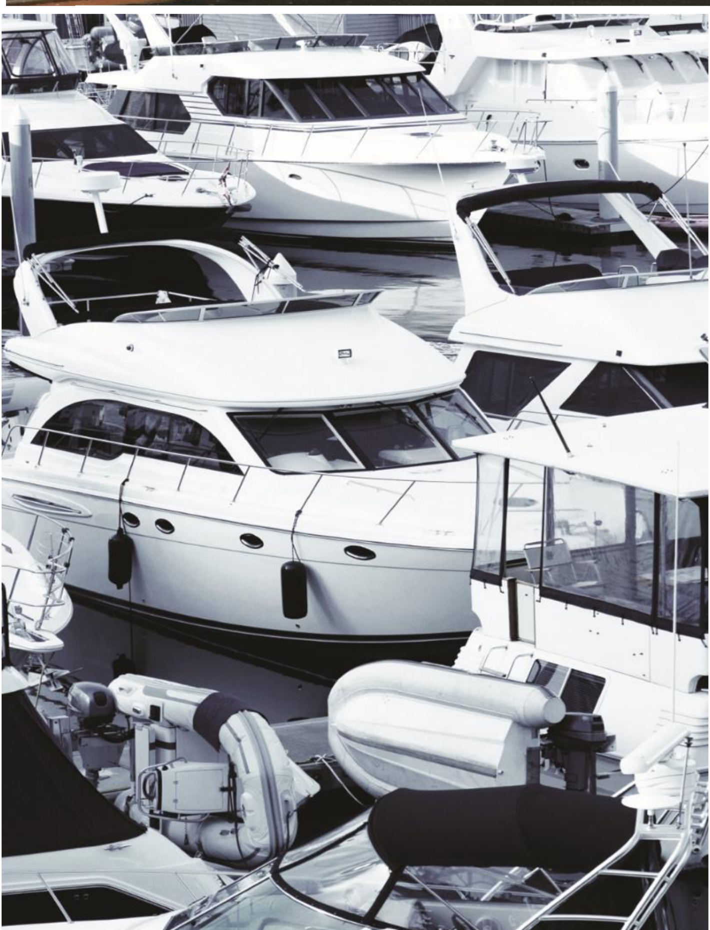
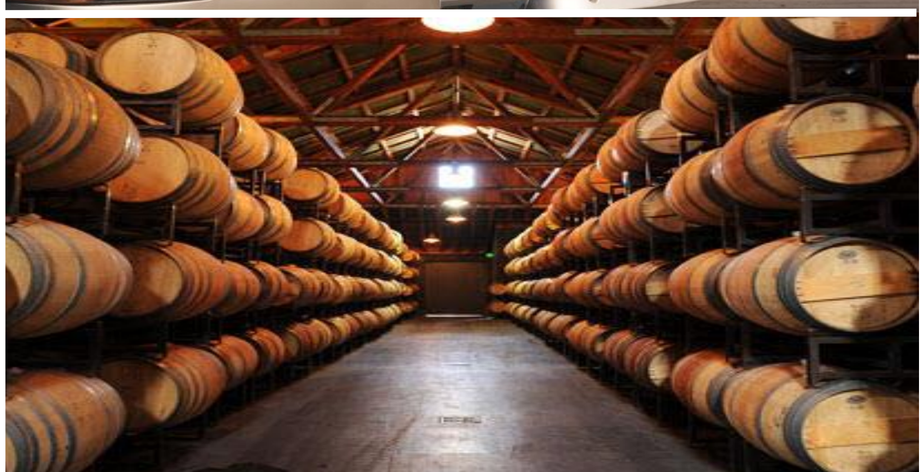
STORAGE COMMANDER

Facility Operations Manual





Welcome to Storage Commander!

Storage Commander Software is the most powerful and easy-to-use self-storage management software available. Our software was developed exclusively for the self-storage industry, Storage Commander was designed using the latest Windows 64bit graphical operating system architecture, incorporates many features not found in any other management program such as supporting multiple languages: English, Spanish and French Canadian.

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 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 facilities operate the same. For instance, some 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 are 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**.

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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History

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Storage Commander Software, LLC 1997-2021

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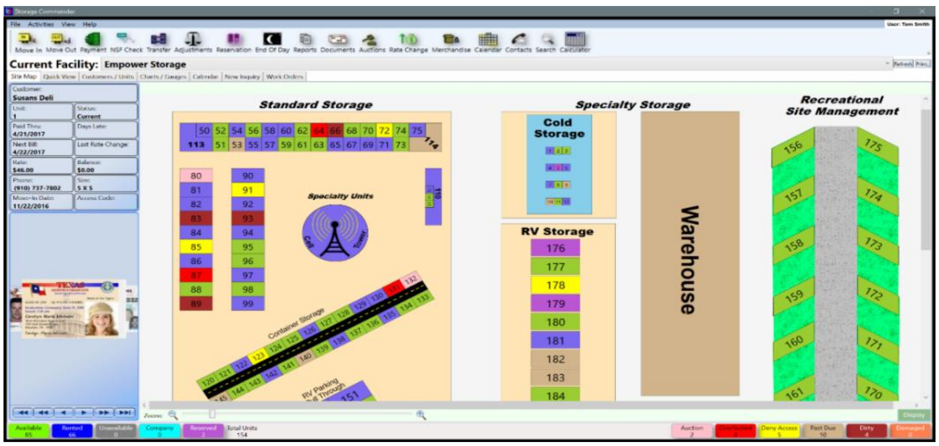
Table of Contents

Facility Operations Module

The Storage Commander facility management system is comprised of two separate modules, the Storage Commander Facility module, used by the on-site facility management team, and the Storage Commander Configurations module, used by corporate and district management to configure and or modify the operational configuration of the Storage Commander facility module. To learn more about using the Storage Commander Configuration Manager module, please refer to the Storage Commander Configuration Manager Manual.

Site Map

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

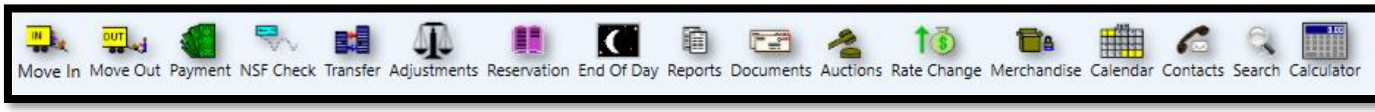


- Notice that the **Colors** on the map correspond to the **Colors** on the **Legend Bar** located at the bottom of the Storage Commander screen. The features associated with the legend bar are explained later in this manual.
- The **Zoom Bar** at the bottom of the map can be moved left and right to Zoom in and out of the map.
- The **Scroll Bar** on the Right Side and bottom of the screen give you the option of scrolling around on the screen.
- If you **hover the mouse** over a unit, it will display the following on the left side of the screen:
  - Customer Name
  - Unit Number
  - Paid Thru Date
  - Next Bill Date
  - Unit Rental Rate
  - Phone Number
  - Move-In Date
  - Status
  - Days Late
  - Last Rate Change
  - Unit Balance
  - Unit Size
  - Access Code
  - Multiple ID Pictures

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

Tool Bar & Drop-Down Menus

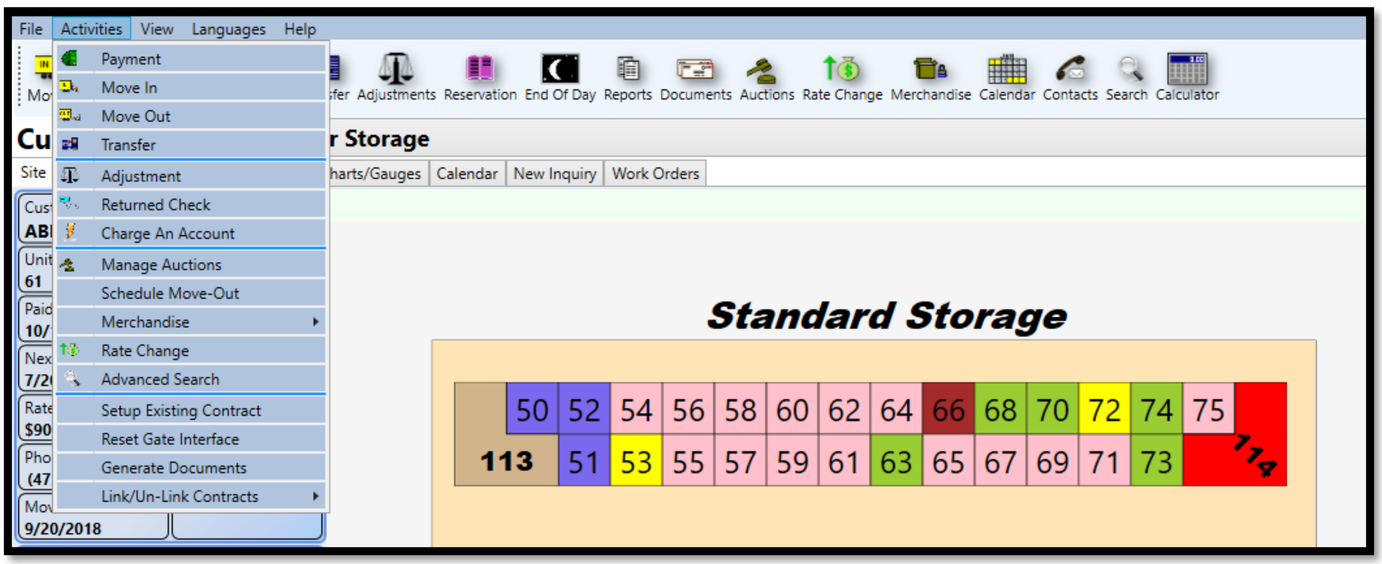
Tool Bar



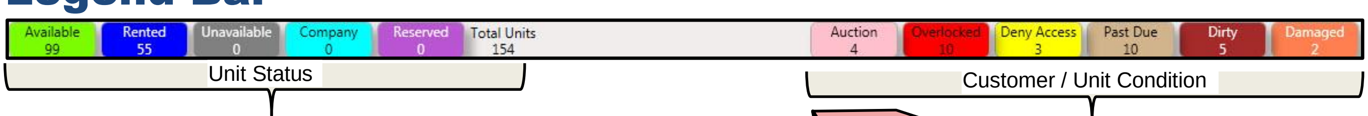
The **Tool Bar** allows access (depending on security settings) to all standard functions available in the Storage Commander program. To access a particular function, ***click*** on the **icon** associated with the function to initiate the process

Drop Down Menus

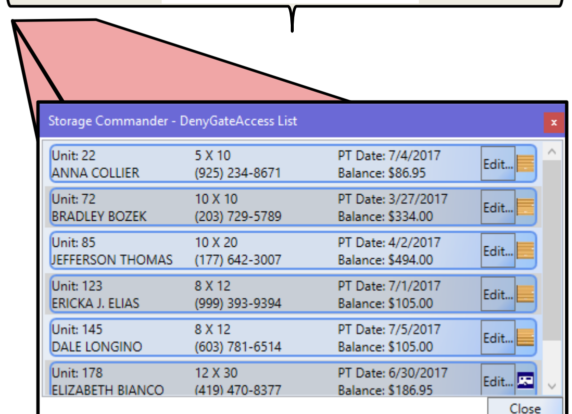
Using the drop-down menus is another way to access the various features found in Storage Commander. Depending on the security access level of the user virtually all the functions contained in the program can be accessed through the **drop-down menu** system. To use the **drop-down menus** system, click on any one of the four main menu selections **File**, **Activities**, **View** & **Help** and select from any of the subtitles contained in the drop down list.



Legend Bar



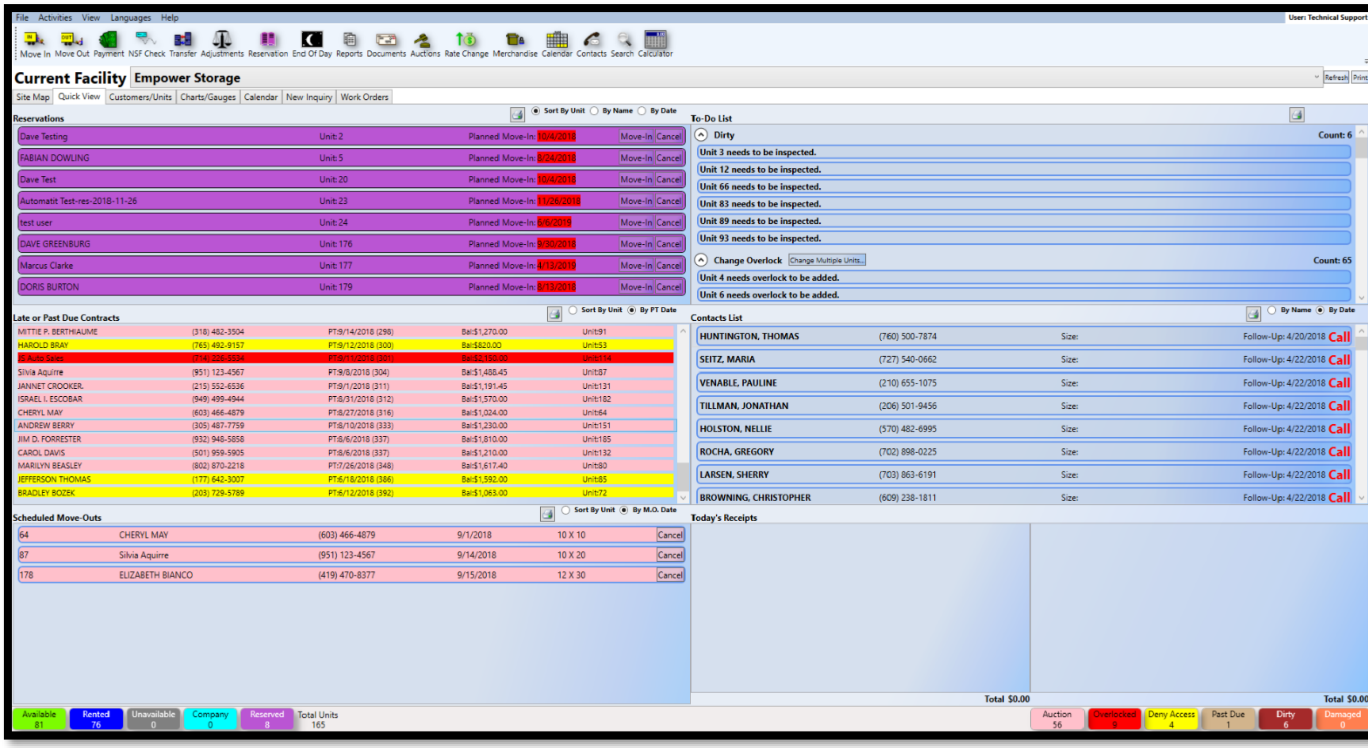
The legend bar provides valuable information as to the status of both general and occupied unit status. The left side of the legend bar displays 5 buttons giving a count of Available, Rented, Unavailable, Company and Reserved units, while the right side of the legend bar displays 6 buttons listing unit conditions/customers that are in a late status as well as units that require special attention. Click on the appropriate button in the legend bar to open a list showing the units that require special attention (**Dirty / Damaged**) or to see what customers are in late steps that require special attention or customers who have not paid their rent yet (**Past Due**) but are not in a late step.



Customers in Deny Access

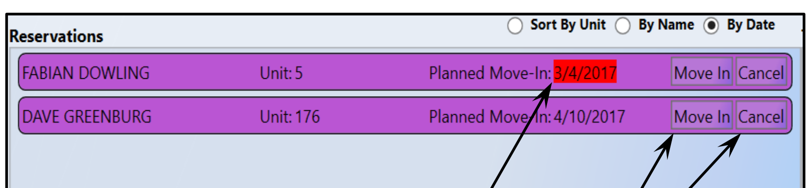
Quick View Window

Click the **Quick View** Tab to access the **Quick View window**



The Quick View feature provides a view of critical customer accounts, unit action items, to-do list and daily receipt totals.

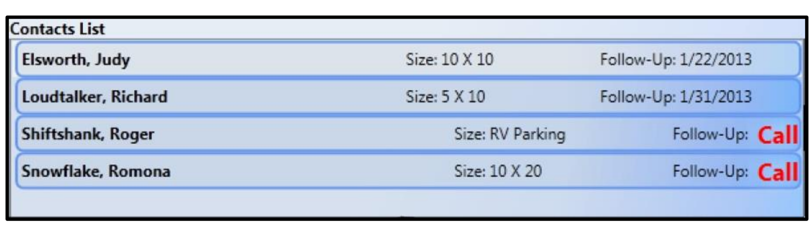
The **Reservation** section of **Quick View** shows the units that are currently reserved at your facility, their scheduled move in date, the unit number assigned to them, and if the reservation is more than 14 days past the scheduled move in date. You can also start the move in process or cancel the reservation from this screen.



Scheduled Move-in Date will be highlighted in red if over 14 days old.

Convert a reservation to a **MOVE-IN** or **CANCEL** an active reservation.

The **Contacts List** displays a list of all open prospects, who have contacted the facility and expressed an interest in renting a space, equivalent to a waiting list. Double clicking on a prospect opens the Contacts section and allows you to manage the follow-up process.



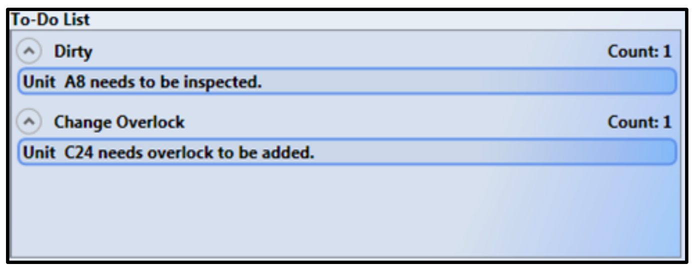
The **Late or Past Due Contract** section shows the delinquent units at your facility. If you want more information on a specific contract, double click on the name to launch the Contract Details screen.

NOTE: The colors correspond to the colors on the legend bar at the bottom of the screen. Just for reference here is what each color means.

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

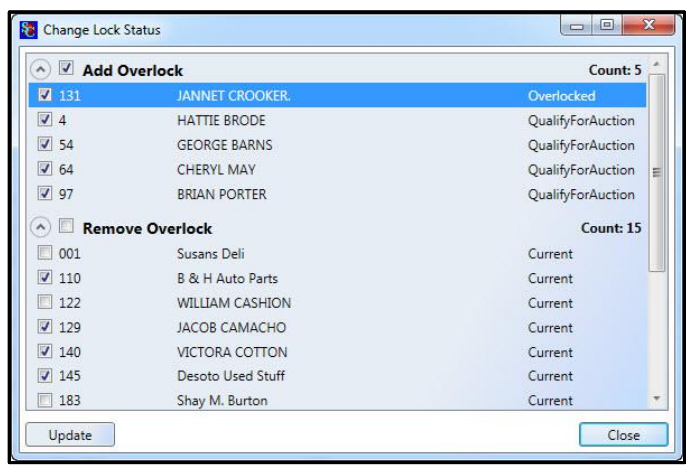
The **Scheduled Move-Outs** screen shows all the Scheduled Move-Outs at your facility.
Click on an item in this list to edit or view the details of the scheduled move-out.
Click on the **Cancel** button to remove the customer from a scheduled move-out.

The **To-Do List** shows dirty units and units that need an over lock add or removed.
To clear a unit from dirty status please follow the instructions below:



Double click the unit
A dialog box will appear and ask you if the unit is clean. Click **Yes** to mark the Unit as Clean, and remove the unit from the list

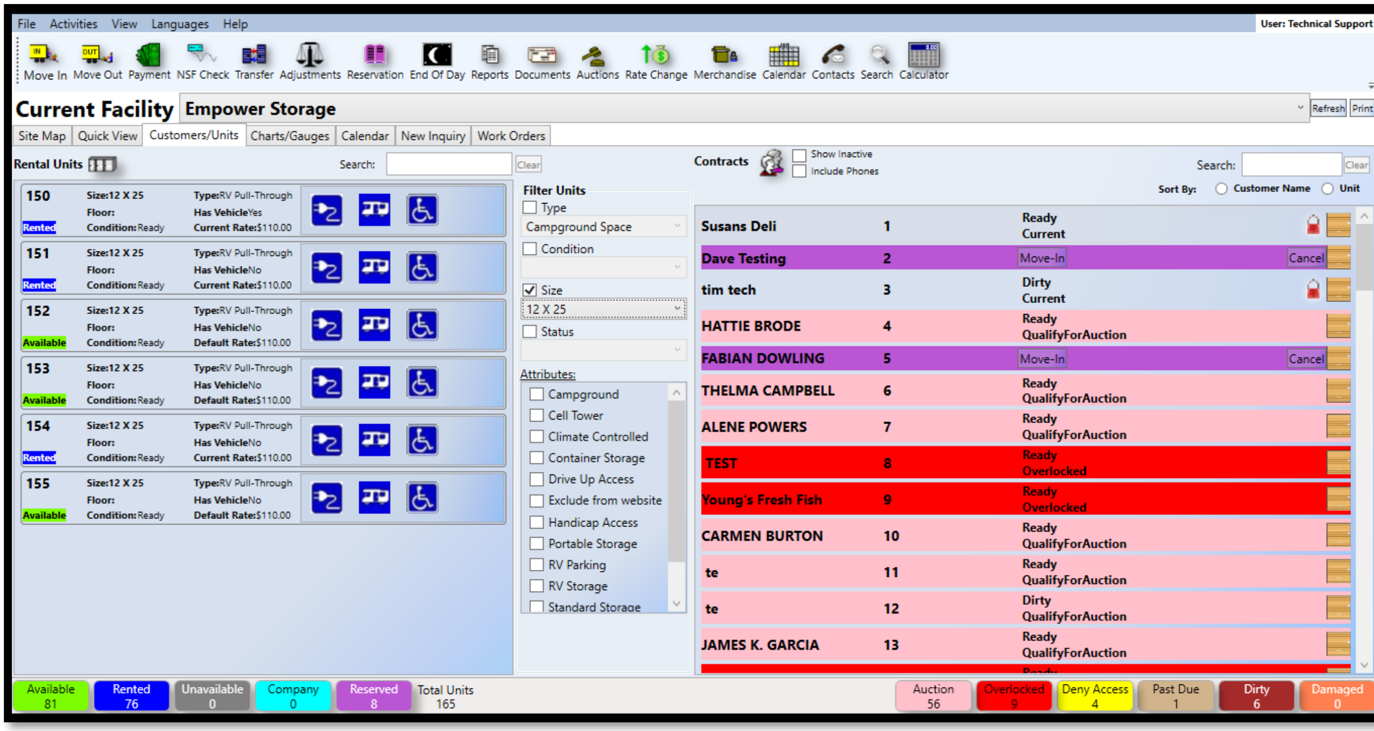
To Change the Overlock status of a unit through the **To Do List** click on the **Change Multiple Units** button to select the units(s).



The **Today's Receipt** section displays all payment Transactions for the current day.

Customer / Units Window

The Customer / Units Working Window is split into two columns, **Rental Units** & **Contracts** (Customers).

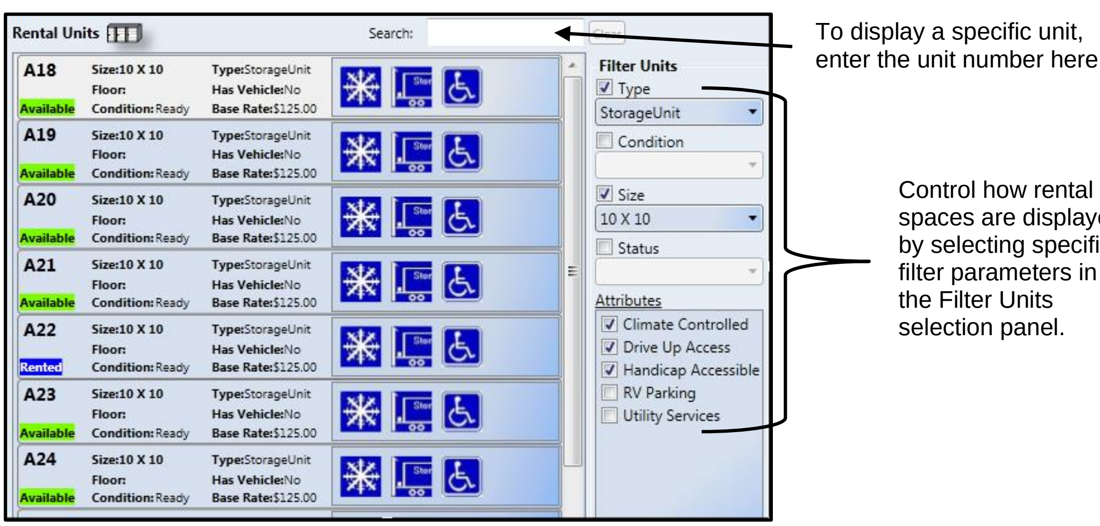


Rental Units column:

From the Customer/Units screen you can move customers into available units and make payments on existing customers.

The Rental Units column can be sorted by **Type, Condition, Size, Status** or **Attributes**. To filter the criteria, select how you would like the list sorted by clicking on the appropriate filter selection in the Filter Units selection panel.

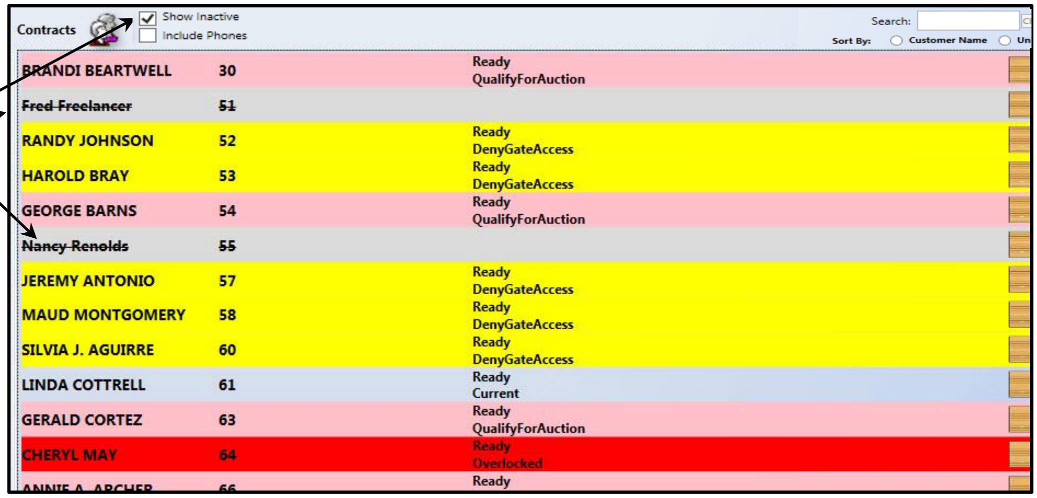
Unit **Type**, **Size** & **Attributes** are created in the Storage Commander Configuration Manager program.



Contracts (Customers) Column

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

Inactive (Moved Out) customers

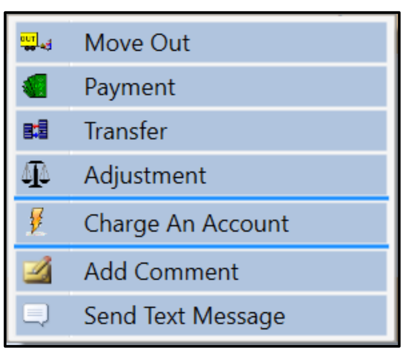


Selecting Inactive (Moved Out) Customers

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

Managing a customer account using the Right Mouse Button

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



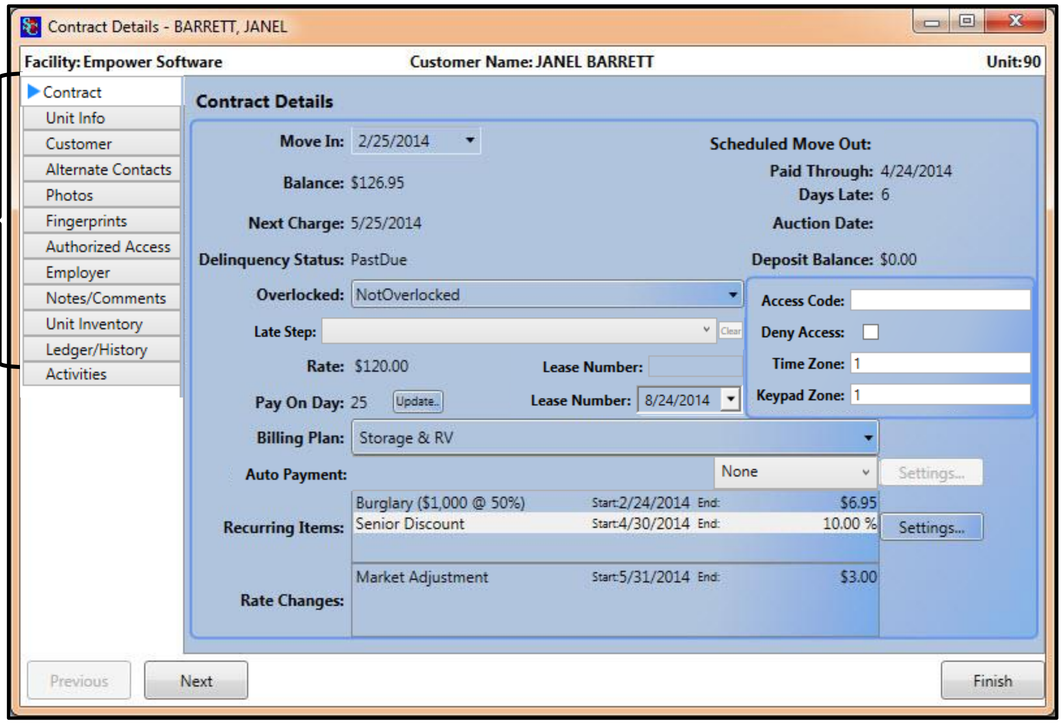
- Move a customer out of the unit
- Process a Payment
- Transfer the customer to another unit
- Make an Adjustment
- Charge a fee to the customer
- Add a Comment
- Send a text message

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

This will open the **Customer Detail** window, allowing you to modify the customers contact information, enter notes, alerts or comments to the account, open the customer ledger to view transaction history,

or open the Activities window where you can; Add additional units to the customer, vacate a unit, Transfer to another unit, Make an Adjustment, reserve a unit, or make a Payment.

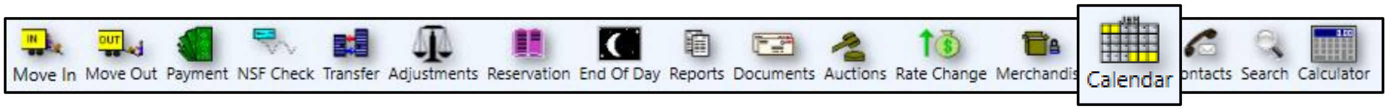
Click on a tab to open a data entry screen associated with the selected item



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

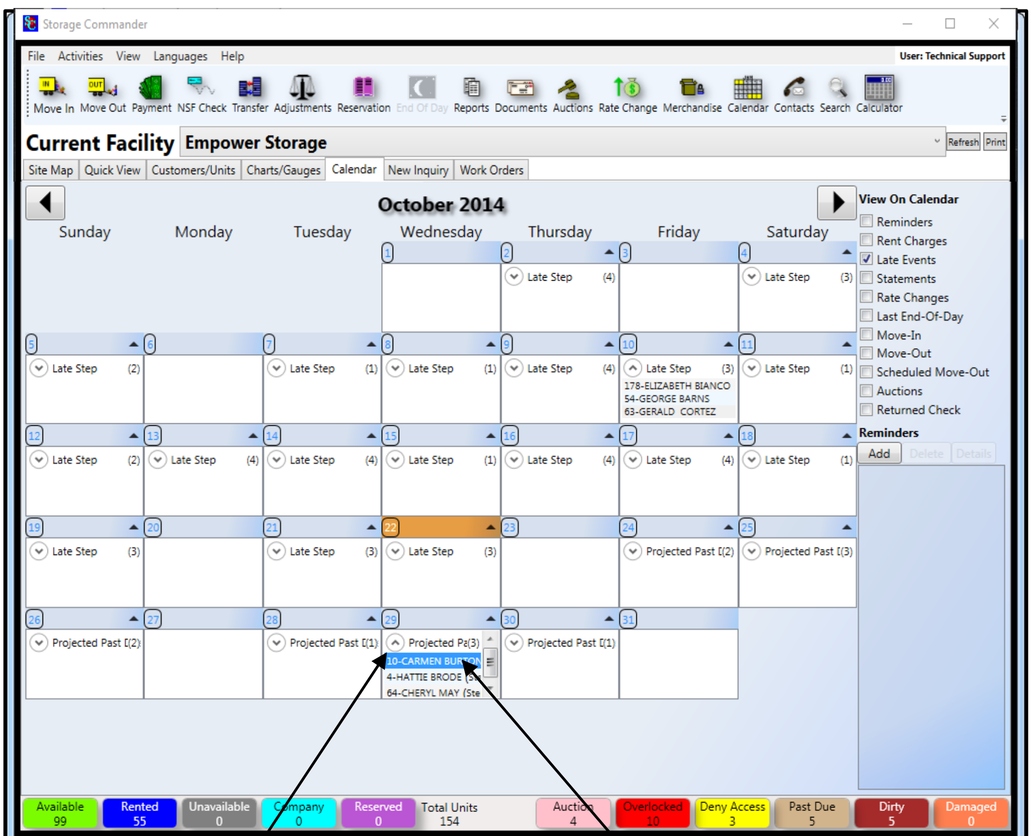
Click on the button associated with the desired function

Calendar



The ***Calendar*** feature provides a powerful tool to help you run your facility. To open the calendar, click on the Calendar icon in the tool bar, or select the Calendar tab on the main screen.

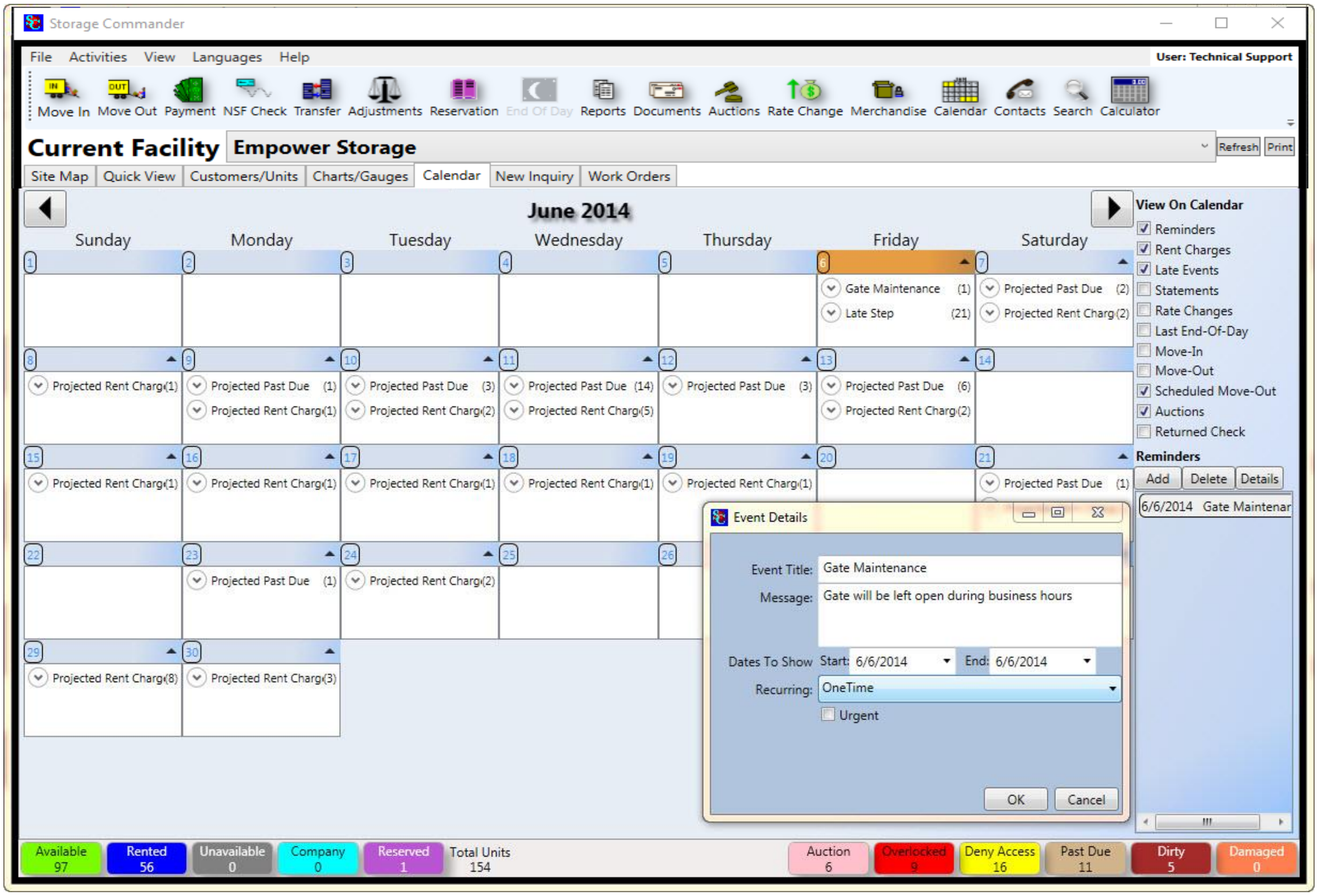
The calendar is arranged to give you a quick overview of events that have happened in previous months, the current month or scheduled events for future months. To move from the current month to a month in the past, click on the left arrow located at the top of the calendar, to show future months click on the arrow located at the right of the calendar. To view events that are scheduled in the month shown in the calendar page, or to view events that have already occurred, select the event you wish to view from the list of calendar events located on the right side of the calendar window. Once you have selected the events you will see them populated in the calendar. If you click on an event within a calendar day a list of customers that are affected by the event will open allowing you to double click on a specific customer to open their detail page



Click on the down arrow to see a list of customers.

Click on a customer name to open the details screen for that customer.

Adding a System Reminder



➢ To add a **Reminder** please follow the instructions included below:

- **Step 1:** On the Calendar click the **Add** button under Reminders. The Event Details screen will launch.
- **Step 2:** Enter the title under **Event Title** and the details about the Reminder, under the **Message** Section.
- **Step 3:** Set the Date information under the **Dates to Show** section.
- **Step 4:** If the Reminder is recurring set how often it reoccurs under the **Recurring** Section. Otherwise, its best left set to **One-time.**
- **Step 6:** If the **Urgent** box is checked a red exlamation point will appear next to the Reminder. Click **OK** to create the Reminder.
- **Step 7:** Once you create the Reminder it should appear in the **Reminders** Section on the calendar.
- **Step 8:** To View the Reminder on the Calendar click **Reminders,** under **View on Calendar**
- **Step 9:** On the **Calendar** the Reminder should appear under the day it was set for. The **Arrow** next to the title of the Reminder can be clicked to expand for more information.
- **Step 10:** To add or remove information from the Reminder, double click on highlighted title. This will launch the Event Details screen and allow editing of the Reminder.

New Inquiry

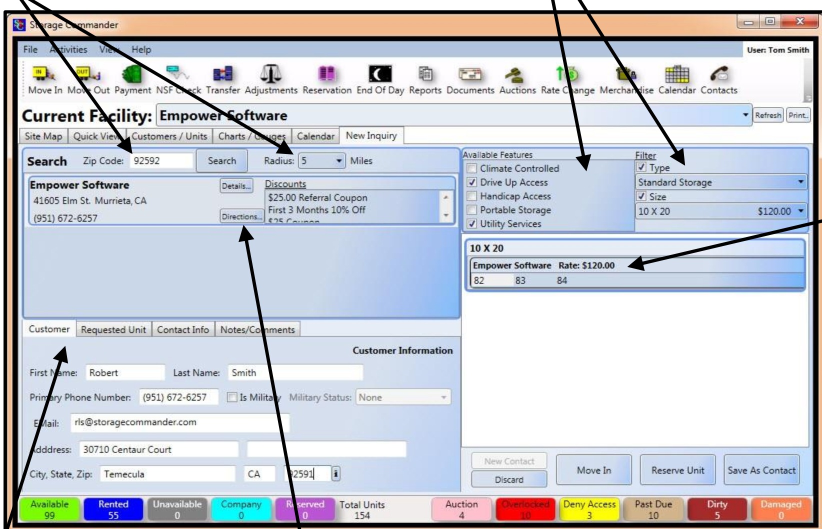
Site Map | Quick View | Customers/Units | Charts/Gauges | Calendar | New Inquiry | Work Orders

Located on the Icon Bar below the **Current Facility** name. The **New Inquiry** screen allows the site manager to quickly locate a storage facility within a specific distance of a customer location. This is especially useful for multi-facilities owners or management companies, as the storage facilities that are listed within the search radius are limited to company or managed properties.

Once a storage facility within the search radius is located, the ***Features, Available Units*** and ***Unit Types*** for the selected storage facility are displayed. When the customer information for the New Inquiry has been completed, and you have selected the **Unit, Unit Features, and Unit Size** you can select to Move the customer in, Reserve the unit or add the customer to the New Contacts list.

Enter the customers zip code, followed by the driving radius to locate all facilities storage facilities within that radius.

Select the Features, Unit Type, and Size of unit.

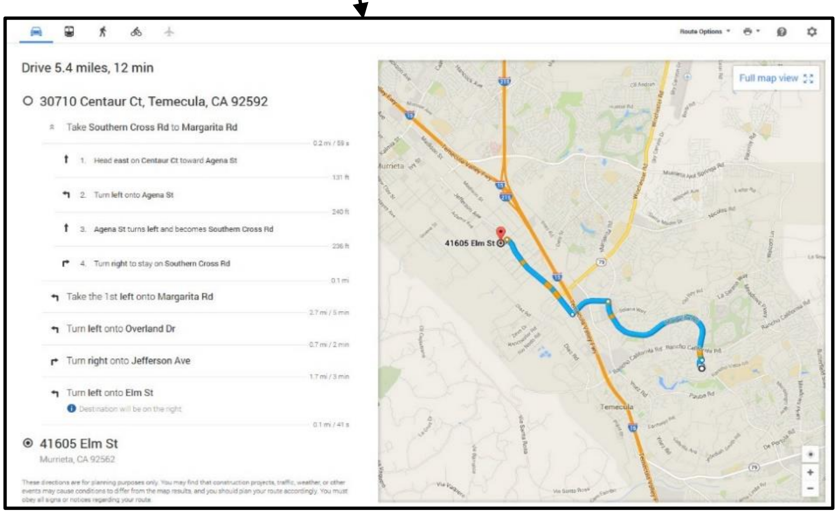


A list of available units that meet the selected criteria will be displayed.

Select how you would like to handle this customer.

Fill in the contact information.

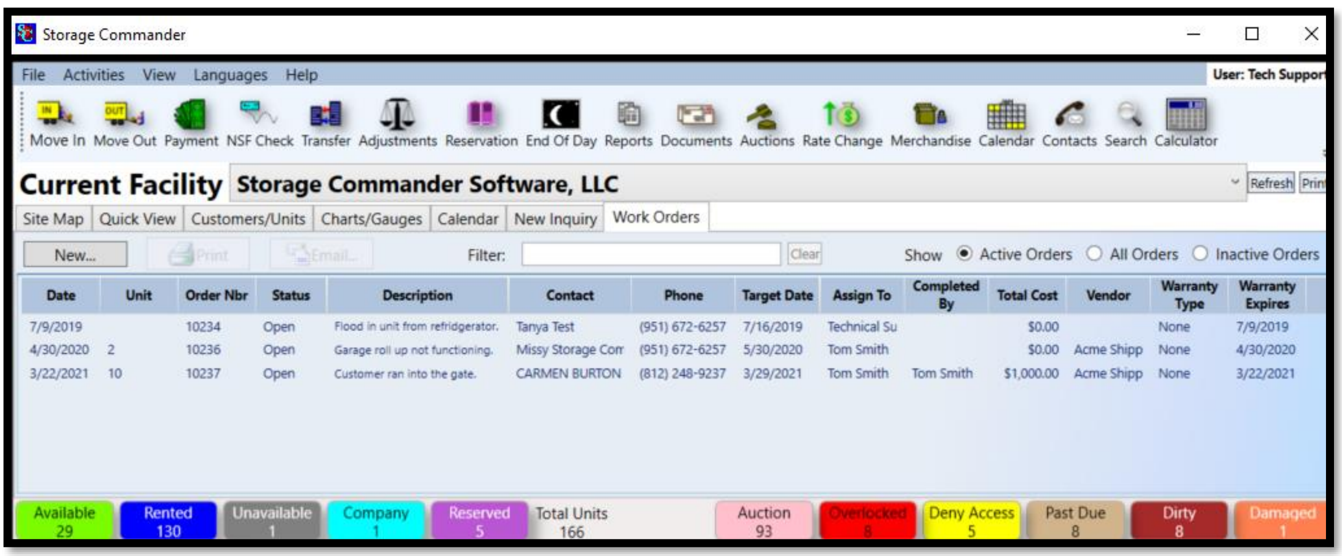
Once the Customer Information (address) has been filled in, click on the **Directions** button to create a turn-by-turn map that can be emailed to the customer.



Work Orders

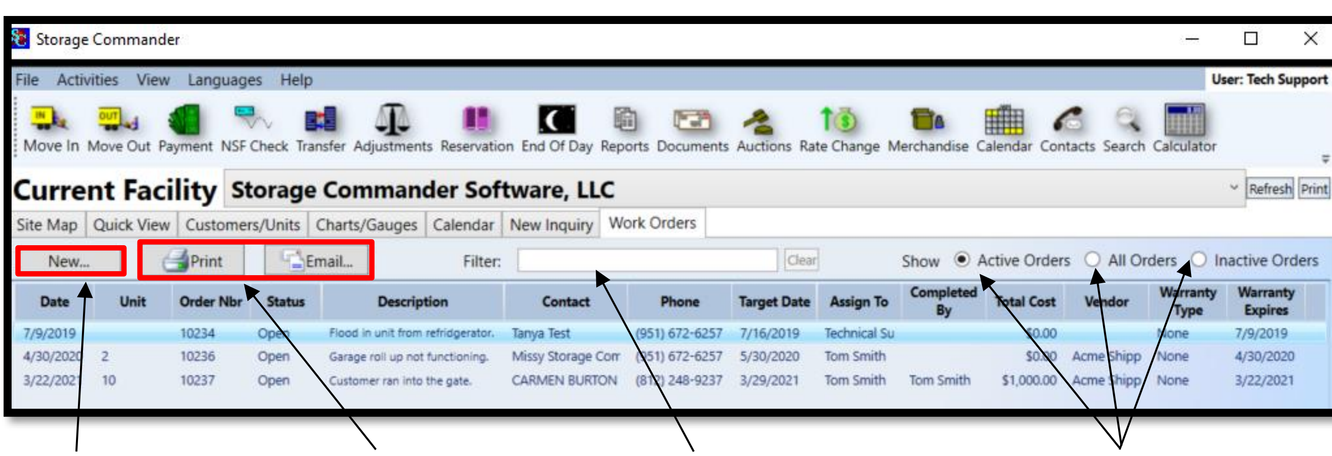
The ***Work Orders*** function allows the facility to create an order for an authorization of maintenance, repair or ***work*** to be completed. In addition, ***Work Orders*** can be created to affect a single unit or on the facility level*.* Work Orders can be generated through the **Work Orders** tab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

Creating a **Work Order** is a fluent process, where the tenant contact information can be assigned to the order from the unit details. The **Work Order** can be assigned to an employee or a pre-defined vendor (created in the Configuration Manager). This feature is designed to be able to add ***parts and labo***r from a fee, discount, or merchandise item. These items can be charged to the tenant account or the vendor.
To utilize the ***Work Orders*** feature, click on the ***Work Orders Tab*** at the top right of the page.



Navigating the Work Orders Tab

The **Work Orders Tab** provides a view of all Word Orders and their status, descriptions and completion information. To open a work order for viewing/ editing or deleting double click the line item.



To create a new Work Order, click ***New***.

To Print or email a selected work order click **Print or Email.**

To search for a specific Work Order, use the **filter** option.

To view **Active, inactive or all orders** click the bubble to show the selected orders.

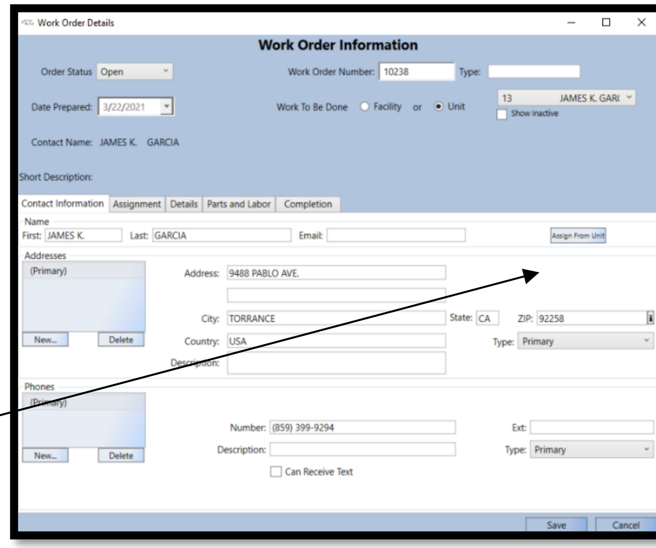
Creating a Work Order

To create a new Work Order, click on New to open a blank Work Order. Fill out as much customer information as you would like to see on the Work Order. Once the customer information is filled out, click the following tabs to complete the information on the work order including, Assignment, Details Parts and Labor and Completion.

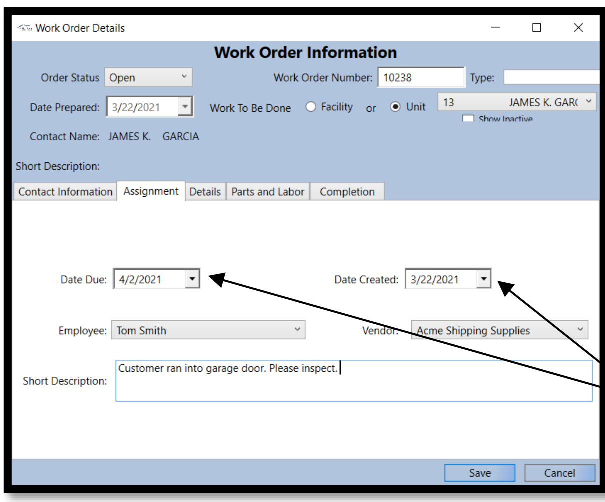
Contact Information

The Contact Information will have the customers unit information assigned to it. Collect or assign the customer information from their unit. This can be pre-populated by selecting Assign from Unit.

NOTE: You can track the work to be done on the facility level or the unit level.



To auto-populate the customer contact information, click **Assign from unit.**



Assignment

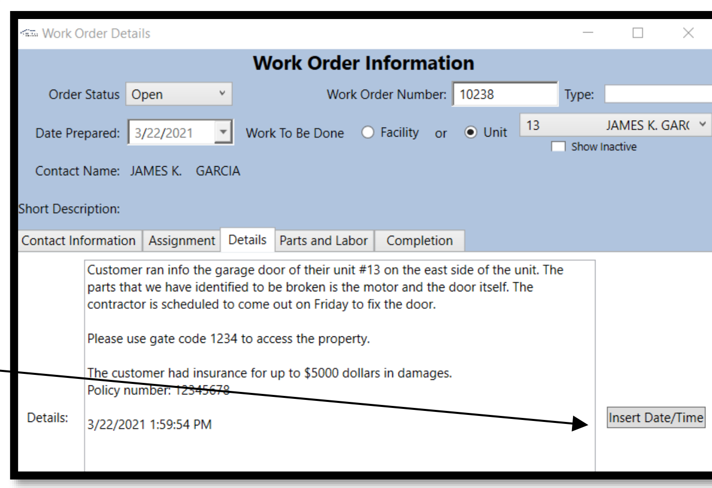
The assignment tab is used to input information about the Work Order and who is responsible for completion. Select a due date and a creation date. To assign the work order to an employee or a pre-defined vendor click the drop-down menu. Leave a short description of the work order in the text box.

To assign the **Work Order** to an **Employee** or **Vendor,** click the drop down to choose one from the list.

Details

Provide a detailed description and instructions for work to be done on the unit or the facility level.

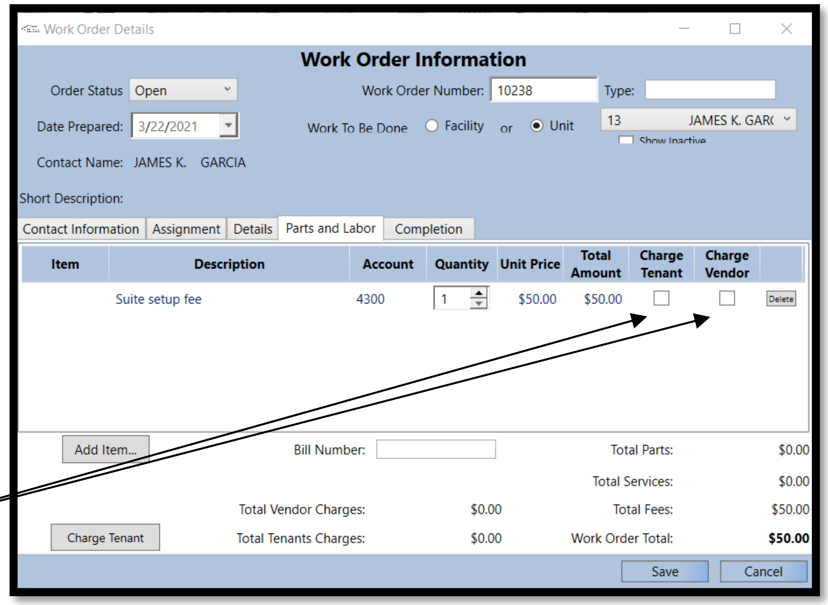
To insert a date and a timestamp, click **Insert Date/ Time.**



Parts and Labor

The Parts and Labor section allows you to add any accrued fees to the Work Order and charge the tenant or the vendor. To select the item that you are wanting to add to the order, click **Add Item** and select the corresponding fee.

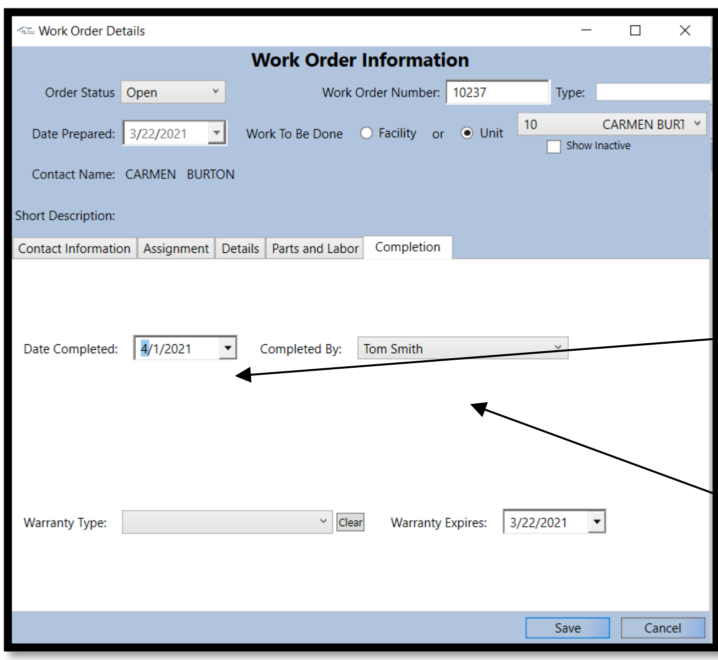
NOTE: The fees are pre-defined in the Configuration Manager is the Fees section. Please refer to the Configuration manager manual for additional help.



To charge the **Tenant** or the **Vendor**, click the check box in the correct column.

Completion

The completion tab of the Work Order allows you to track the completion of the order, including Date Completed, who completed the order, Warranty type and Warranty expiration.



To select the **Date Completed**. Click the calendar drop down.

To select the **employee** who completed the order, click the **Completed By** drop down.

NOTE: There are a handful of Work Order reports. Please refer to the reporting tool or the [Storage Commander Report Book].

Move-In

Move-In Methods

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

Tool Bar

Click on the **Move In** Button in the Tool Bar

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

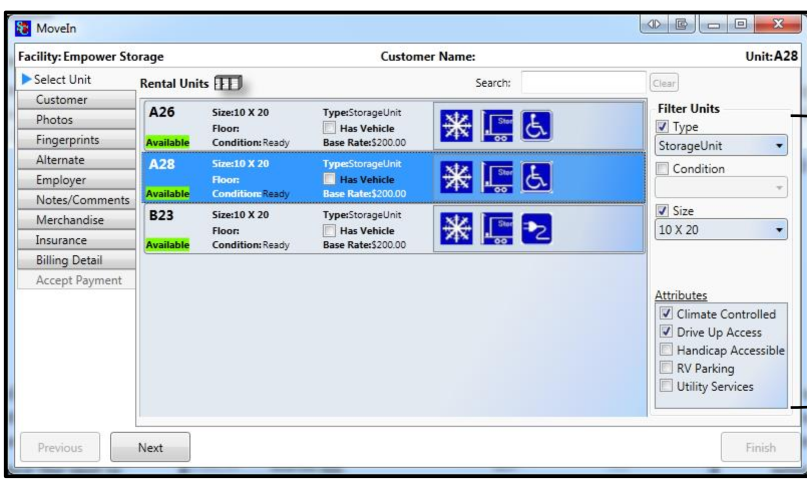
TYPE ....Storage Unit, RV Parking, Mailbox, Wine Locker, or any other type that was created for your facility.

SIZE ....By unit size.

ATTRIBUTES......Created and assigned to units through the Configuration Manager program.

(In this example we have created several attributes for the writing of this manual)

CLIMATE CONTROLLED
DRIVE UP ACCESS
HANDICAP ACCESSIBLE
RV PARKING
UTILITY SERVICES



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

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

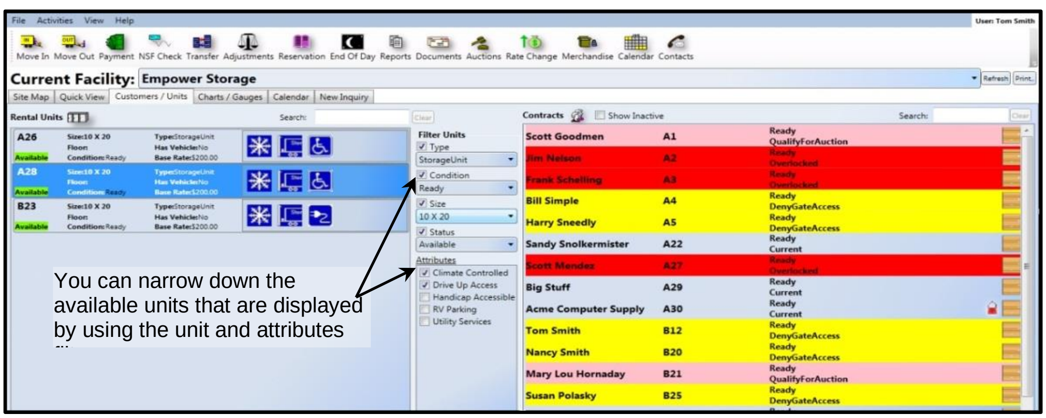
Once the unit is selected it will become highlighted. Click **Next** to Proceed.

Move-In using Activities Drop Down Menu

Located at the top of the screen is the **Activities** drop down menu item, clicking on this item opens a drop-down menu which lists management functions available to you depending on your security level. One of these items is Move-In. Selecting Move-In will open the Move-In window where you will start the move-in process.

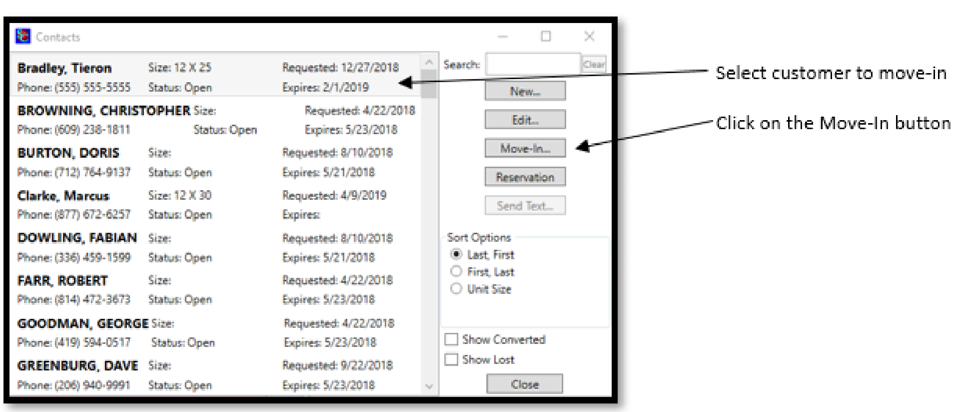
Move-In using Customers / Units Screen

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



Move-In using Contacts Screen

Customers who have been entered into the system as contacts can easily be moved in. Click on the Contacts button in the tool bar to open the contacts' window. Select the customer and click on the **Move-In** button.



Starting the Move-In Process

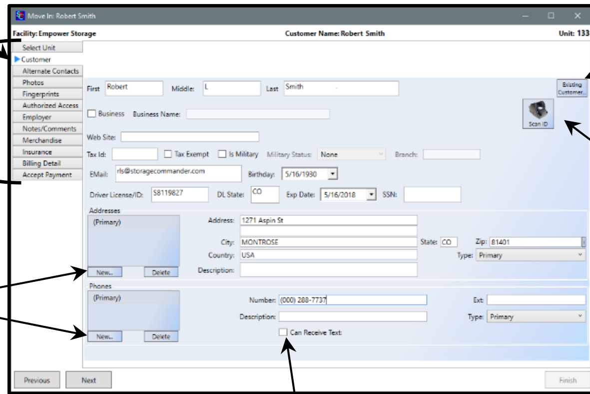
Customer Tab

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

Customer Tab

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

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



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

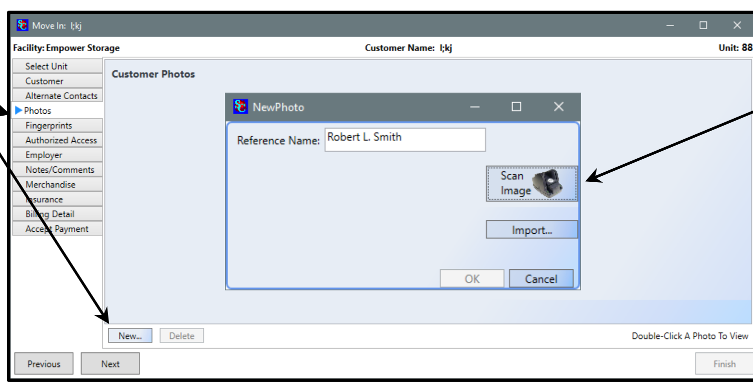
If the driver license ID conforms to the AAMVA standard, and you have installed an id scanner, a button showing the installed scanner will appear. Click on this button to scan the id and have the customers address information automatically entered the move-in screen.

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

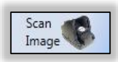
Photo ID

Adding a customers photo id to the customers account allows for easy visual identification through the Site Map. To add a photo ID during a move-in, click on the Photo tab to display the photo ID screen and click on the New button. Enter the name of customer and click on the Scan Image button.

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



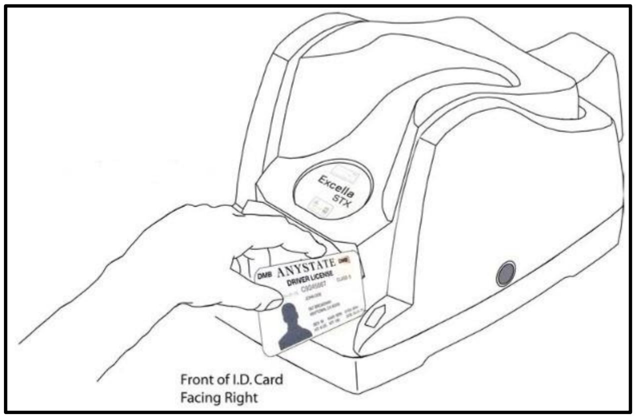
Any devices supporting photo ID capture will be displayed in the **New Photo** screen. Select the device to proceed to the photo capture screen.



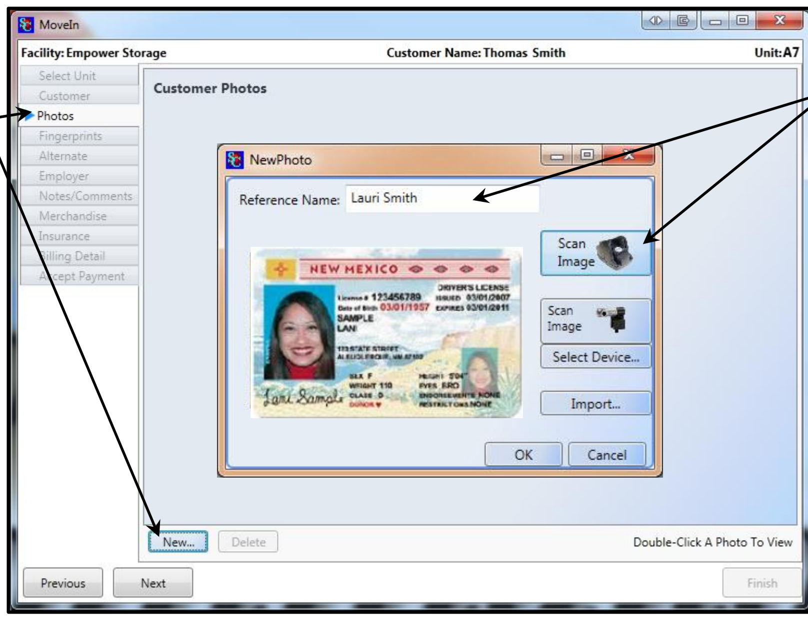
Using the Multipurpose Scanner

The multipurpose scanner offers a convenient method to scan driver licenses. This device not only takes the place of the Photo ID Kit but also scans and transfers the data from Checks, Credit Cards & Driver licenses *(driver licenses must conform to the national AAMVA standard)*

To capture an image of a driver license using the multipurpose scanner, click on the button showing a picture of the multipurpose scanner. Insert the customer ID into the scanner as referenced below.



Click on the Photos tab and then on the New Button.



Enter a **Reference Name** and click on the **Scan Image** button for the multipurpose scanner.

The driver license id will be automatically moved into the multipurpose scanner and the picture will be appear in the New Photo window. Click on the OK button to complete the process.

Importing Pictures

The Import feature allows pictures taken from digital cameras to be added to a customer account. To add digital pictures, click on the **Import** button and navigate to the drive/folder where the picture resides, select the picture and click on the **Open** button. Enter a **Reference Name** and click on the **OK** button to add the new picture to the customer account.

Adding Additional Pictures to an account

Additional pictures can be added to an account by repeating the process referenced above.

Deleting Pictures

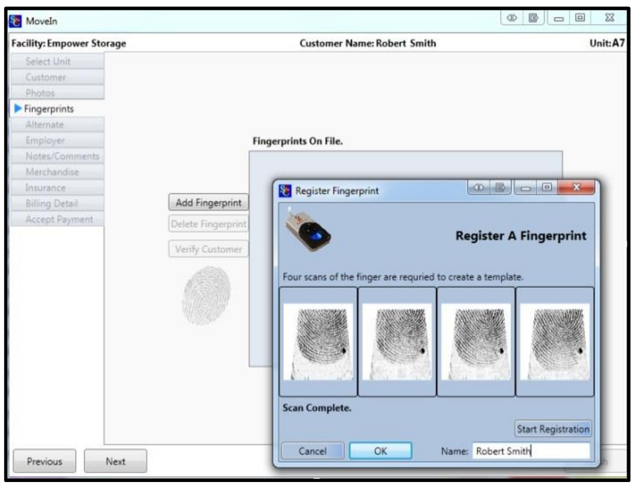
To delete a photo ID from a customer account, open the Customer Details screen for the account and select the **Photos** tab. Click on the photo to be deleted (you can have multiple photos assigned to an account) and click on the **Delete** button.

Adding Fingerprints

Storage Commander supports fingerprint identification of storage customers and facility managers

To register a storage customer fingerprint during the move-in process click on the **Fingerprint tab** and select **Add Fingerprint**.

Have the customer press their finger (we recommend using the right index finger) onto the fingerprint pad four (4) consecutive times (this is necessary for the system to insure a positive read of the fingerprint pattern). When all four scans have been completed, click on the OK button to complete the process.

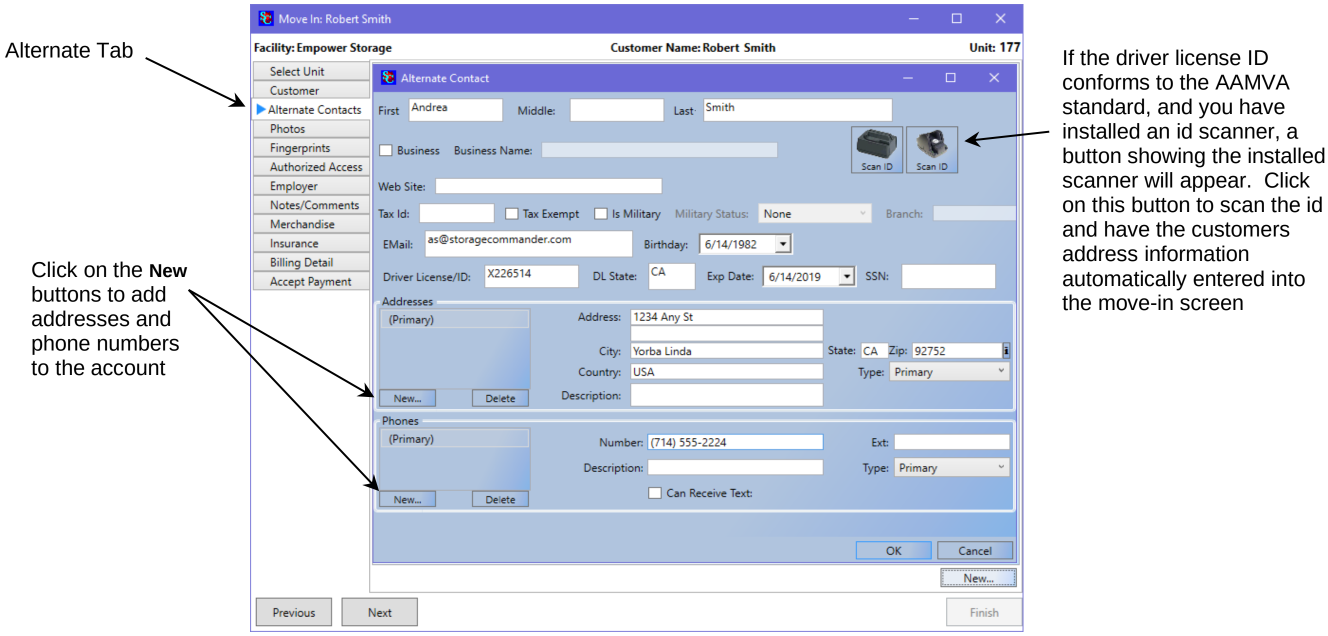


To verify a customer using their fingerprint, click on the **Customers/Units** tab and double click on the customer in the **Contacts** list. Select the **Fingerprints** tab, select the customers fingerprint file under the **Fingerprints on File** box and click on **Verify Customer**. Have the customer press their finger into the fingerprint scanning pad to initiate the verification process.

Using a fingerprint to identify a customer or to log a manager into the system provides the upmost in facility security.

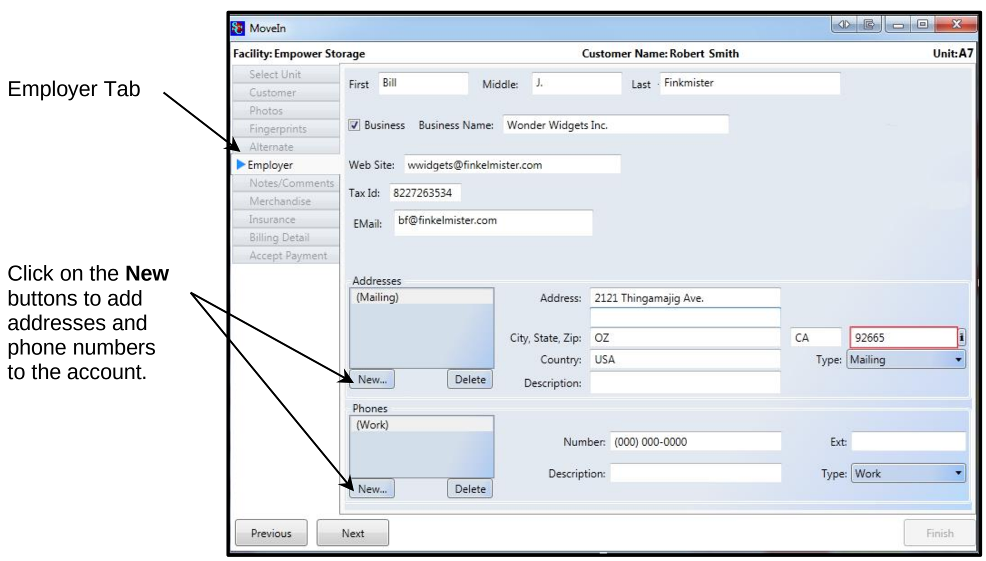
Adding Alternate Contacts

Fill in the Alternate Contact information fields as required using the Tab key or mouse to move from field to field. This information will aid you in locating the primary occupont in case of emerengy or for collections purposes.



Adding Employer Information

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



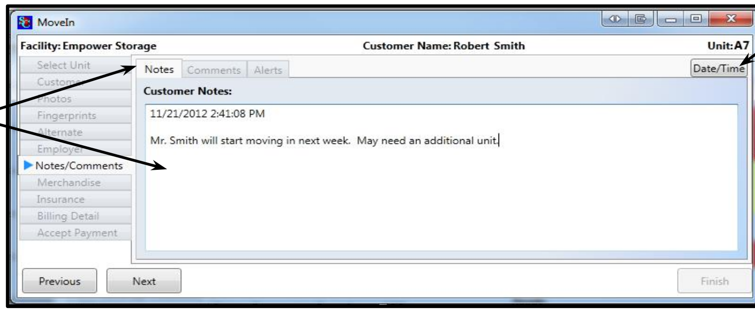
Adding Move-In Notes / Comments & Alerts

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

Adding Notes

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

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



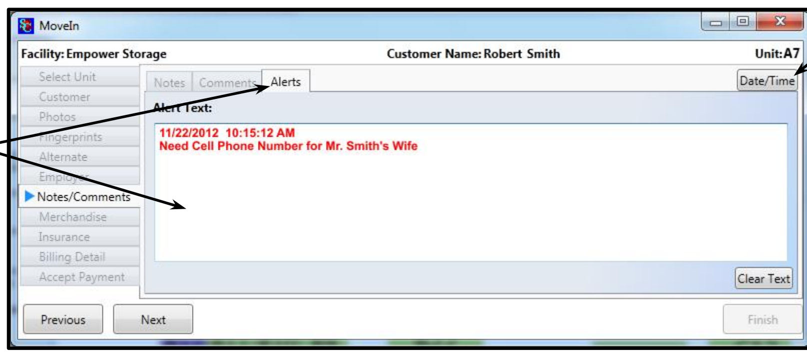
Click on **Date/Time** to add the current date & time to the note.

Adding Alerts

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

From the Move-In window select **Notes/Comments** and click on the **Alerts** Tab. Clicking on the Date/Time button will insert the current date and time into the note field. Enter the note by typing in the note box.
The alert note will be automatically saved when you leave the Alerts screen.

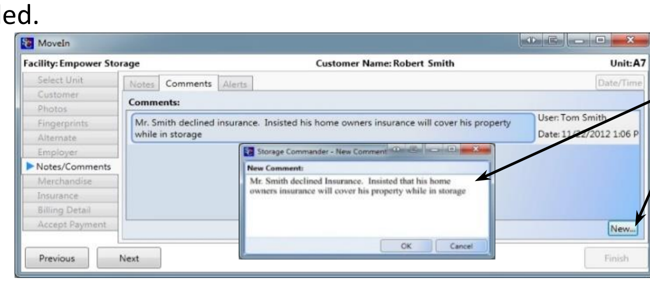
Click on the **Alerts** Tab, followed by clicking anywhere in the Notes box to enter the note.



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

Adding Comments

Customer comments differ from customer notes in that once they are entered, a date and time stamp is automatically added to the note along with the ID of the logged in manager. When the note is saved, it cannot be altered.
From the Move-In window select **Notes/Comments** and click on the **Comments** tab. Any comments that have been previously added to the account will be displayed. To add a new comment, click on the **New** button and enter the note into the **New Comment** box, click on the **OK** button to save the new comment. Once the comment is saved it will be added to the comments box with the Username (manager) and the date and time of when the comment was recorded.

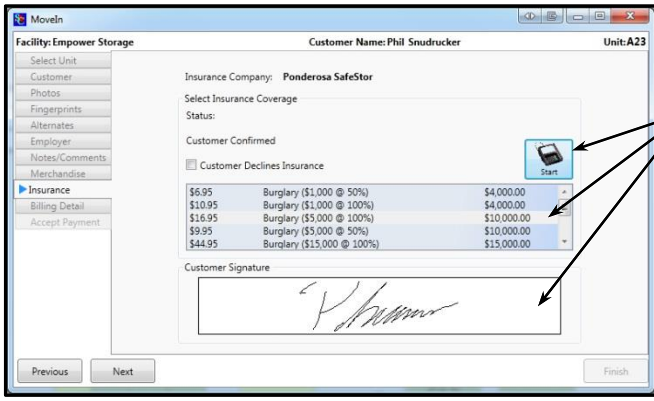


Click on the **New** button to add a new comment to the customer's account.

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

Adding Insurance to a Customer Account

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



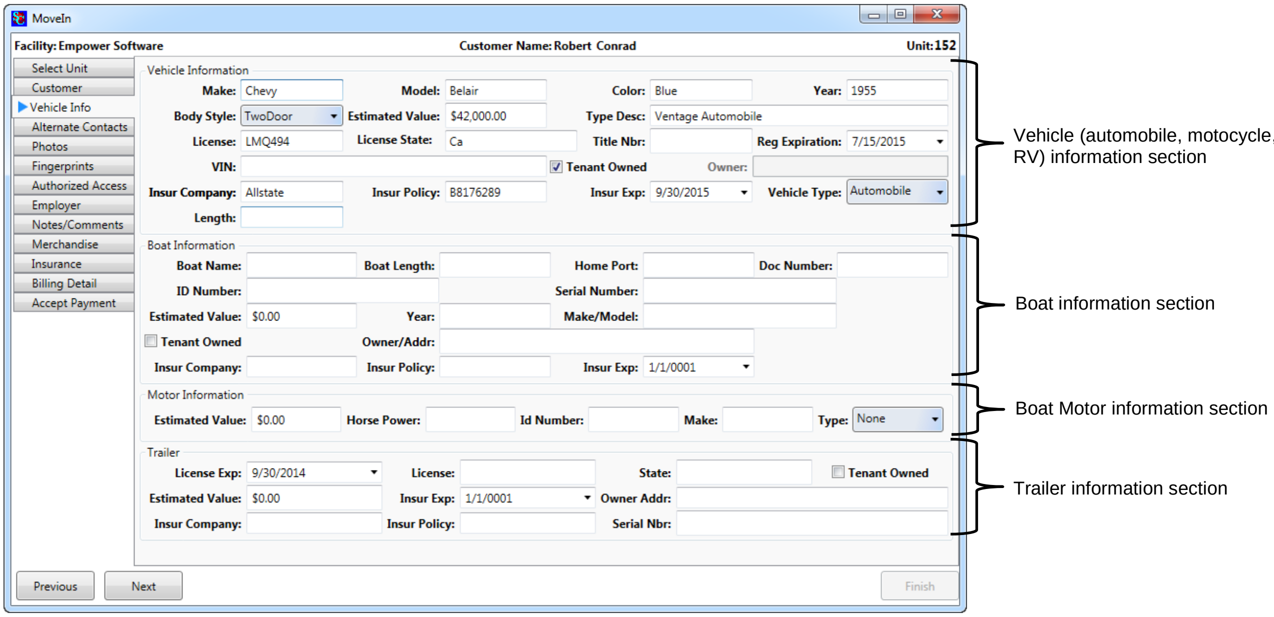
Click on the Customer Access Terminal icon to allow customer to select insurance policy and to digitally sign insurance contract.

Customer Display Terminal

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

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

Advanced Vehicle Storage Information



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

Entering Data into the Vehicle Information Screen

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

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

Available Vehicle Information Reports

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

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

Unit

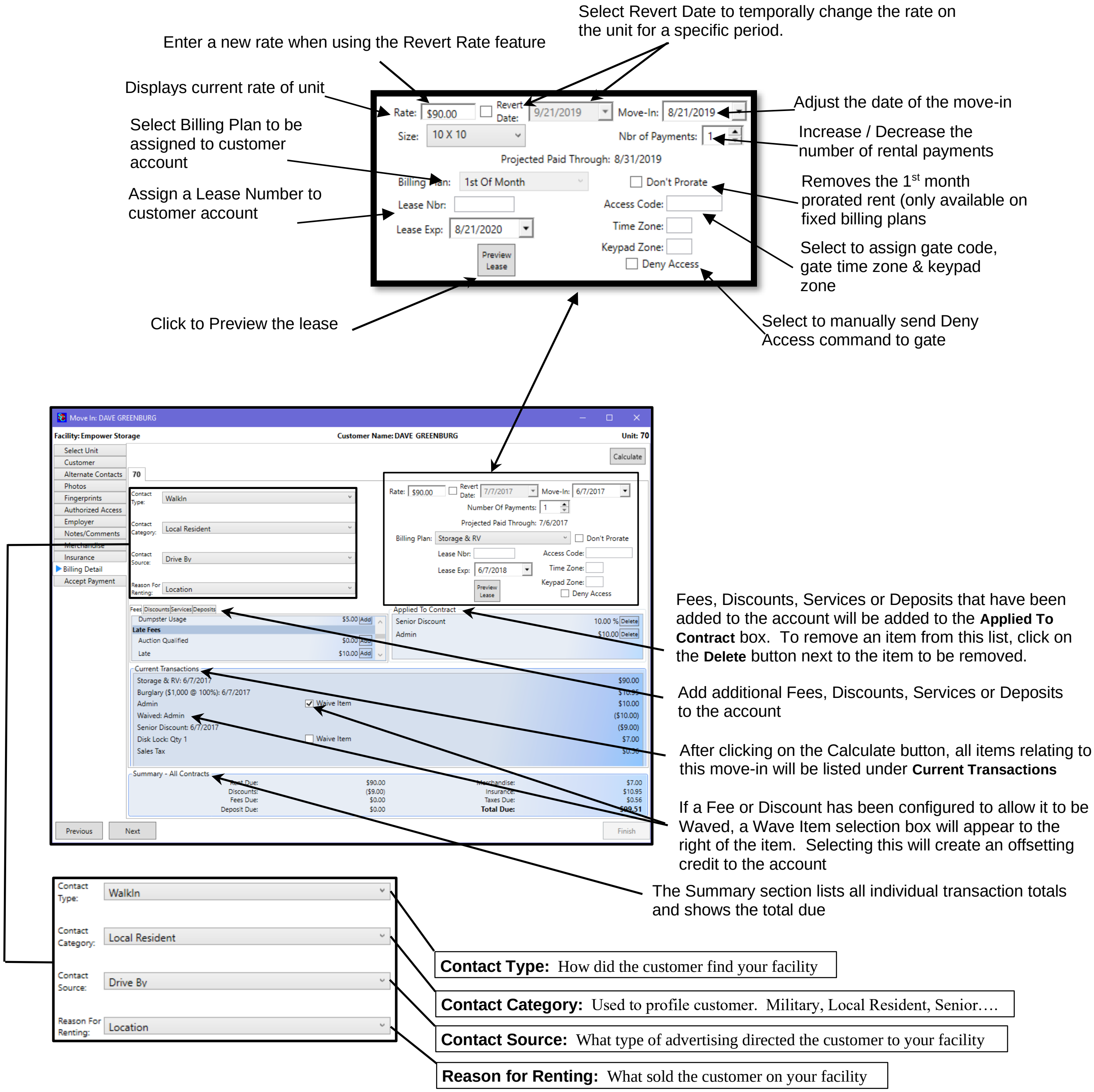
- Vehicle Expirations
- Vehicle Insurance Expirations
- Vehicles

Analysis

- Length of Stay

Move-In Billing Screen

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



Changing Move-In Date

Click on the down arrow in the **Move-In date** field to change the date of the move-in. By default, the move-in date will be set to the current date. By changing the date, the prorated rental charge will be re-calculated (fixed billing plans) and the new move-in date will be recorded to the customer account.
This field is security protected and can be enabled or disabled through the **Configuration Manager.**

Changing the Rental Rate, at Move In

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

Setting a Revert Rate, at Move In

Setting a **revert rental rate** during a move in like changing the rental rate, as discussed above. The difference between the two processes is that using the **Revert Rate** feature allows the modified rental rate to be active for a pre-determined period before it automatically returns to the street rate.
Click inside the **Rate field box** and enter the new rate, click on the **Revert Rate** check box and enter the date the modified rate will expire and return to the current street rate.

Changing the Number of Payments

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

Projected Paid Through Date

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

Selecting the Billing Plan

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

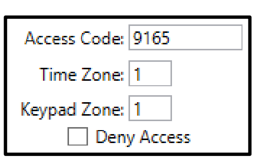
Don't Prorate

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

Lease Number

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

Access Control

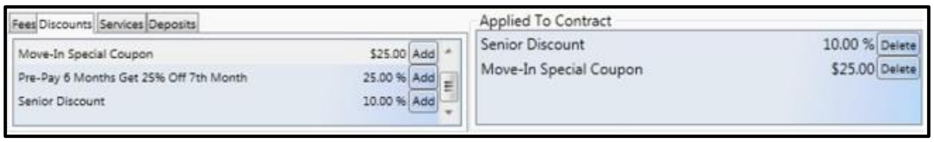


Click on the **Access Control** button to open the **Gate Access Details** window. Enter the customers gate access number that has been assigned to the customer into the **Access Code** field. If your gate security system supports multiple entry gates and gate access times, you can enter the codes for these features into the **Keypad** and **Time zone** fields. When the move-in is completed all access control settings will be sent to the gate system.
The **Deny Access** check box will disable the gate code at the keypad restricting the customers access into the facility. Although this same function is automatically accomplished through the late step process, you can override the late step and manually deny the customer gate access by selecting this function.

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

Adding Fees, Discounts, Services & Deposits

Click on the **Tab** corresponding to **Fees**, **Discounts**, **Services** and **Discounts** 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 in the **Applied to Contract** window to the **Current Transactions** section, where they will be included in the move-in and attached to



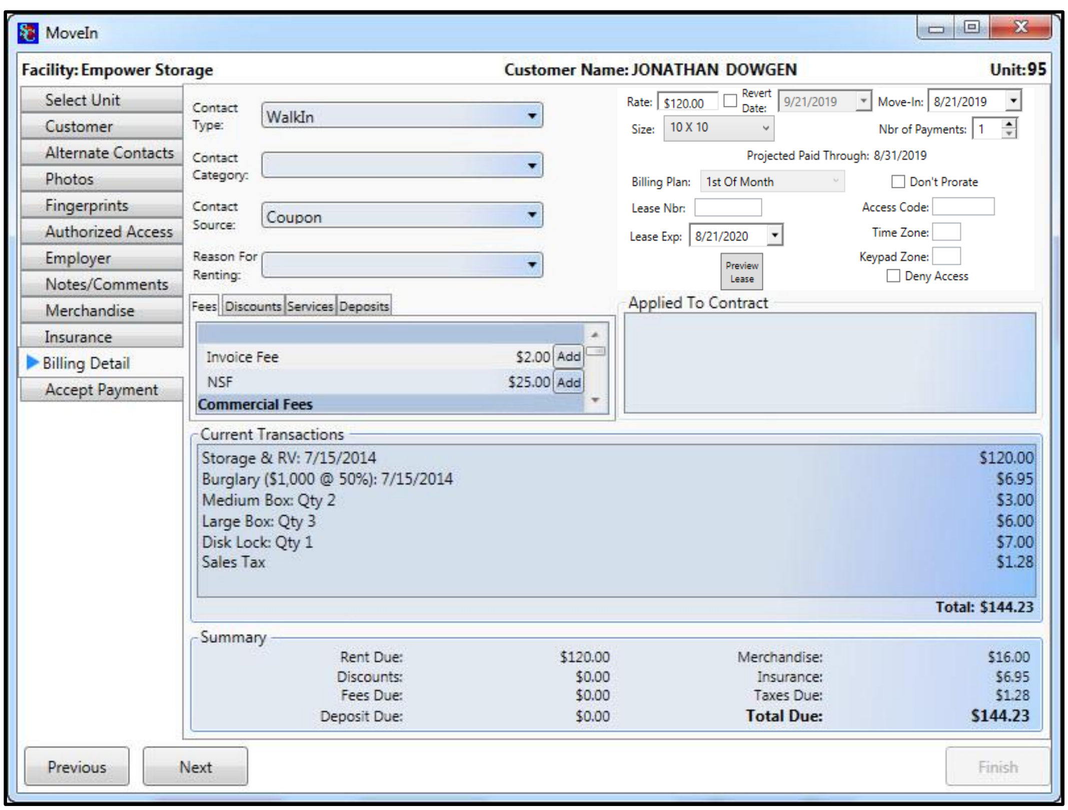
the customer account.

Current Transactions

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

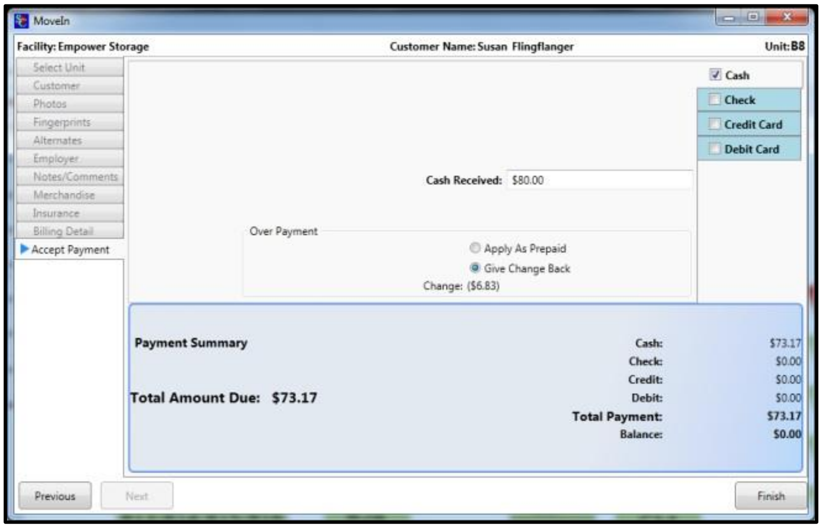
Summary

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



Move-In Payment Screen

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



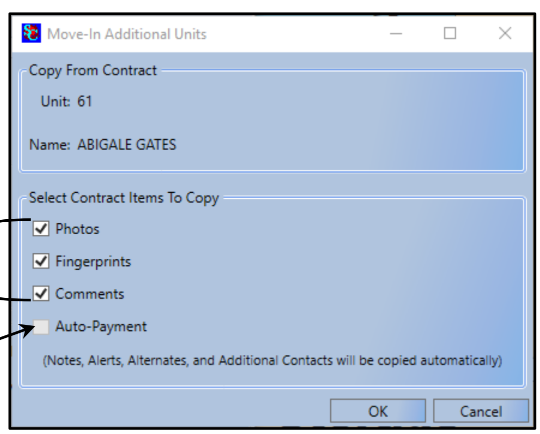
The payment amount that was calculated in the billing screen will be automatically entered into the payment screen. If the payment is different than the calculated amount due, enter the ACTUAL payment being received into the **Cash Received** field (for cash payments), **Check Amount** (for check payments), or **Amount** field (for credit or debit card payments).
If the payment amount is higher than the amount due on cash payments, an **Over Payment** box will appear allowing you to select how you would like to handle the overpayment; the options are:
Apply as Prepaid; Where the money in excess of the amount due, will be applied as a credit balance on the account. **Give Change Back**; where the money in excess of the amount due, can be given back to the customer.

Adding Units to an Existing Customer

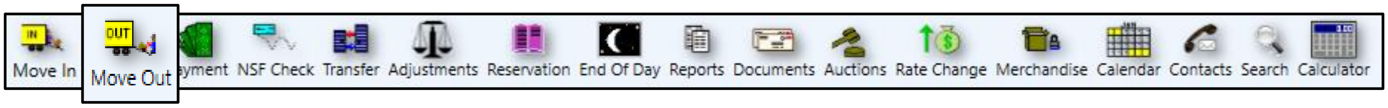
Additional units can be added to a customer account using one of two methods; By selecting an available unit and clicking on the “**Existing Customer**” Button in the **Move in Customer** screen and selecting the customer that you are adding a unit to from the **Select Contacts** list; Or by selecting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

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

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



Move Out

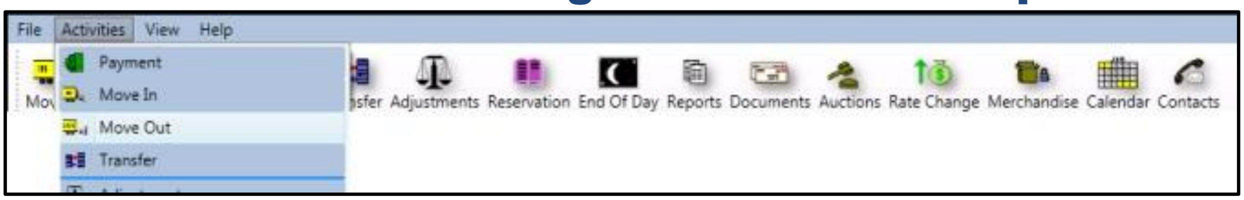


There are five (5) different ways to initiate the move-out process. Although the move-out may be initiated from different screens the overall process is the same. We will start this section by identifying all 5 move-out techniques. Once you know how to initiate a move-out using any of the 5 methods, we will walk you through the actual move-out procedure.

Initiate a Move-Out Using the Tool Bar

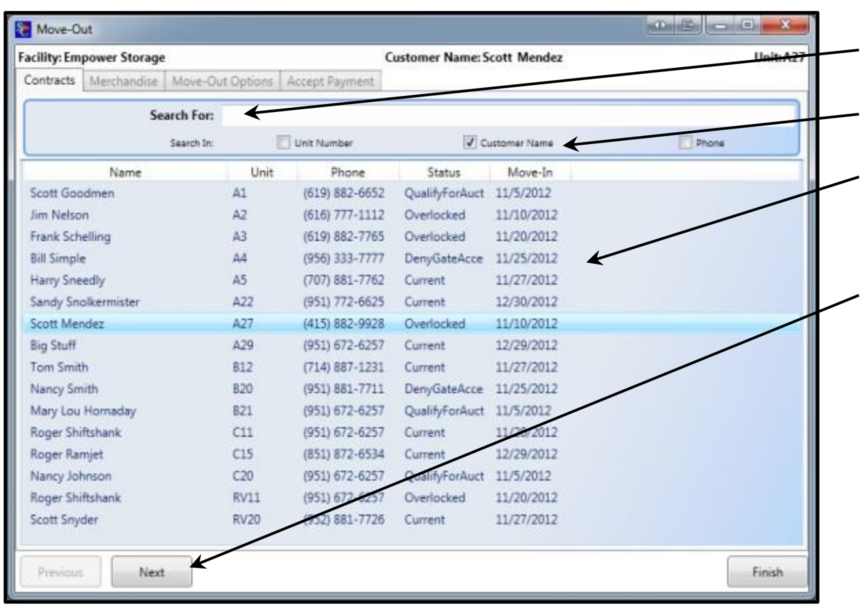
Click on the **Move-Out** Icon located at the top of the screen, under the drop-down menu items. This will open the **Move-Out** Contracts search screen containing all active customers. We will discuss this screen in detail later in this section.

Initiate a Move-Out Using the Activities Drop Down Menu



Move-Out Active Customers Search Screen

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



Enter the search criteria into the Search For field.

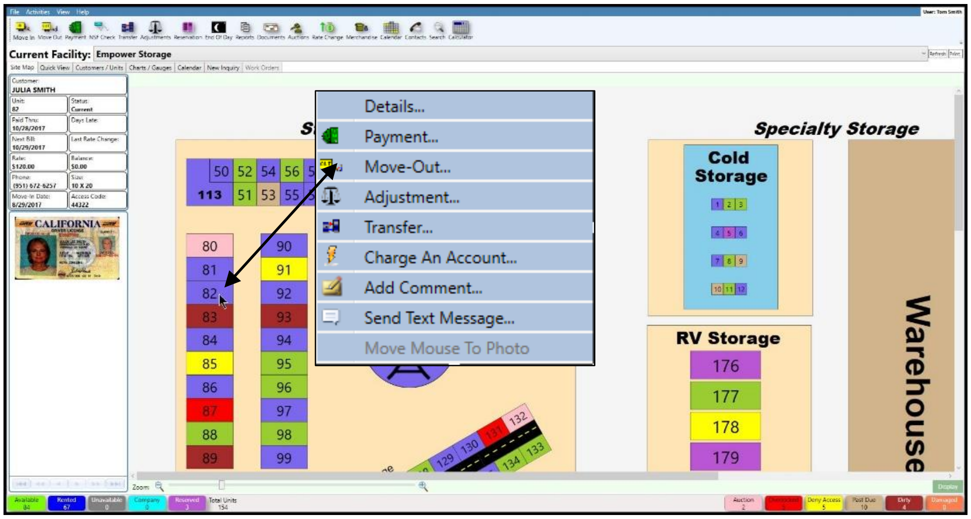
Select search parameters.

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

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

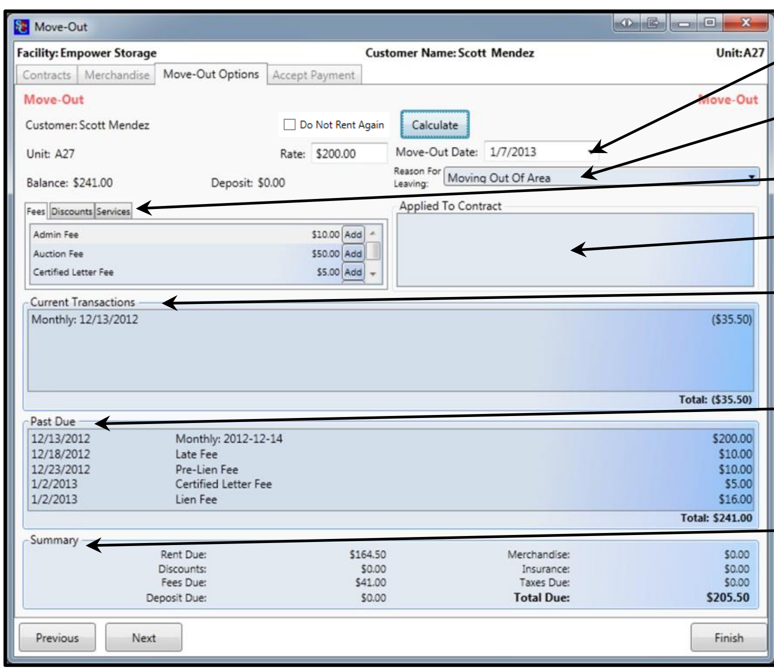
Initiate a Move-Out Using the Site Map

To use the ***site map*** to initiate a **move-out**, position the mouse over the customers unit and click on the unit using the Left mouse button, this will open the activities selection box. Using the Left mouse button click on **Move-Out** to open the Move Out Billing screen.



Move-Out Billing

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



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

Click on the down arrow in the **Reason for Leaving** box to select from a list of pre-defined vacate decisions.

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

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

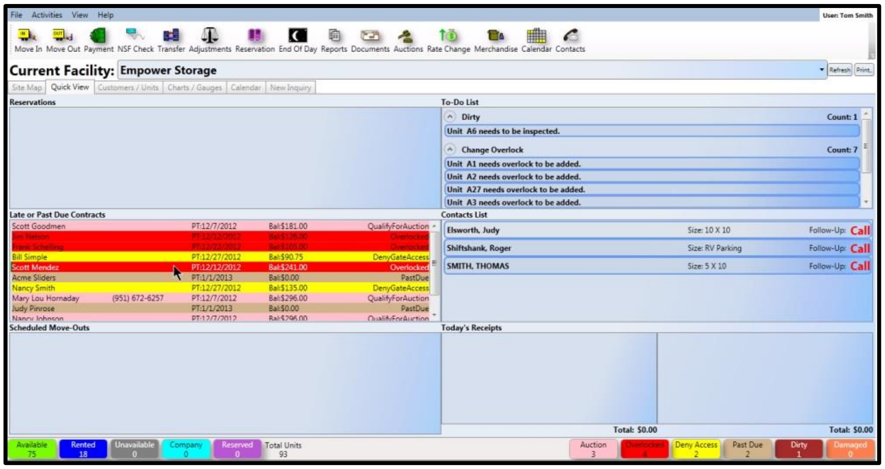
The **Current Transactions** section will show the amount of rent due or rent credit for the move-out as well as any additional fees or discounts that were applied.

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

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

Initiate a Move-Out Through the Quick View & Customer/Units Windows

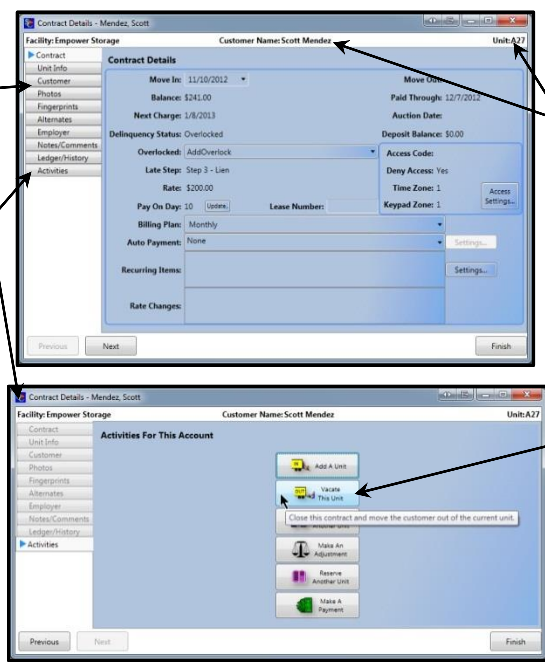
Double clicking on a customer name in ***Quick View or Customer/Units*** windows will open the Contract Details window. This will open the **Contract Details** screen.



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

Click on the Customer Tab to see the customer's name and address information.

Click on Activities / Vacate This Unit to open the Move-Out billing screen.

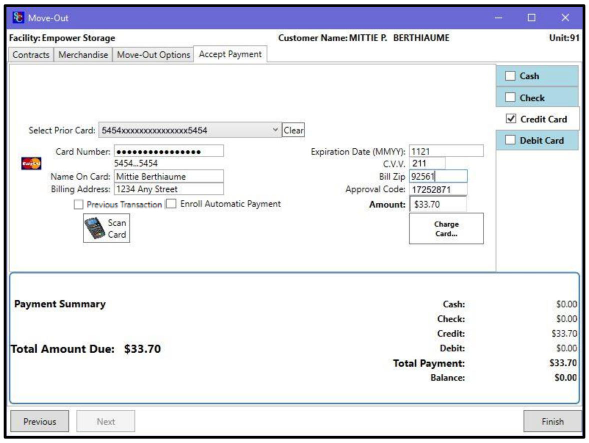


Verify Customer Name & unit number Left click on Details.

Click on the **Vacate This Unit** button to open the Move-Out billing screen.

Move-Out Accept Payment Screen

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



If the payment amount is higher than the amount due on cash payments, an **Over Payment** box will appear allowing you to select how you would like to handle the overpayment; the options are:
Apply As Prepaid; Payments in excess of the amount due, will be applied as a credit balance on the account.
Give Change Back; If the payment amount is in excess of the amount due, the difference will be calculated and displayed in the payment screen.

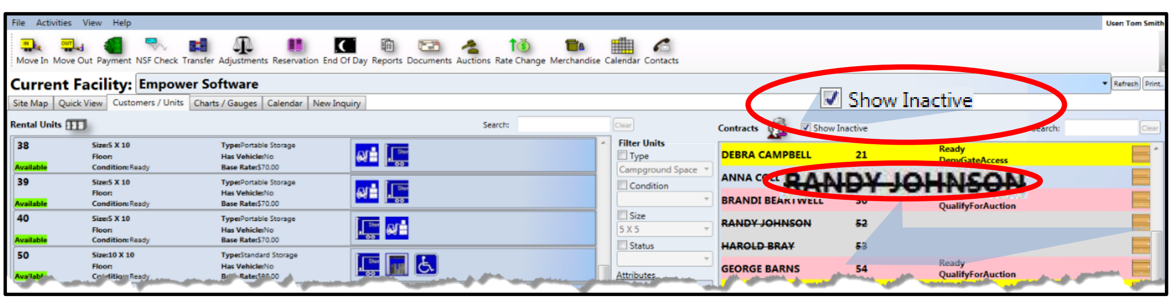
Reversing A Move-Out

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

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

Setting Up a Reverse Move-Out

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



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

Making a Payment

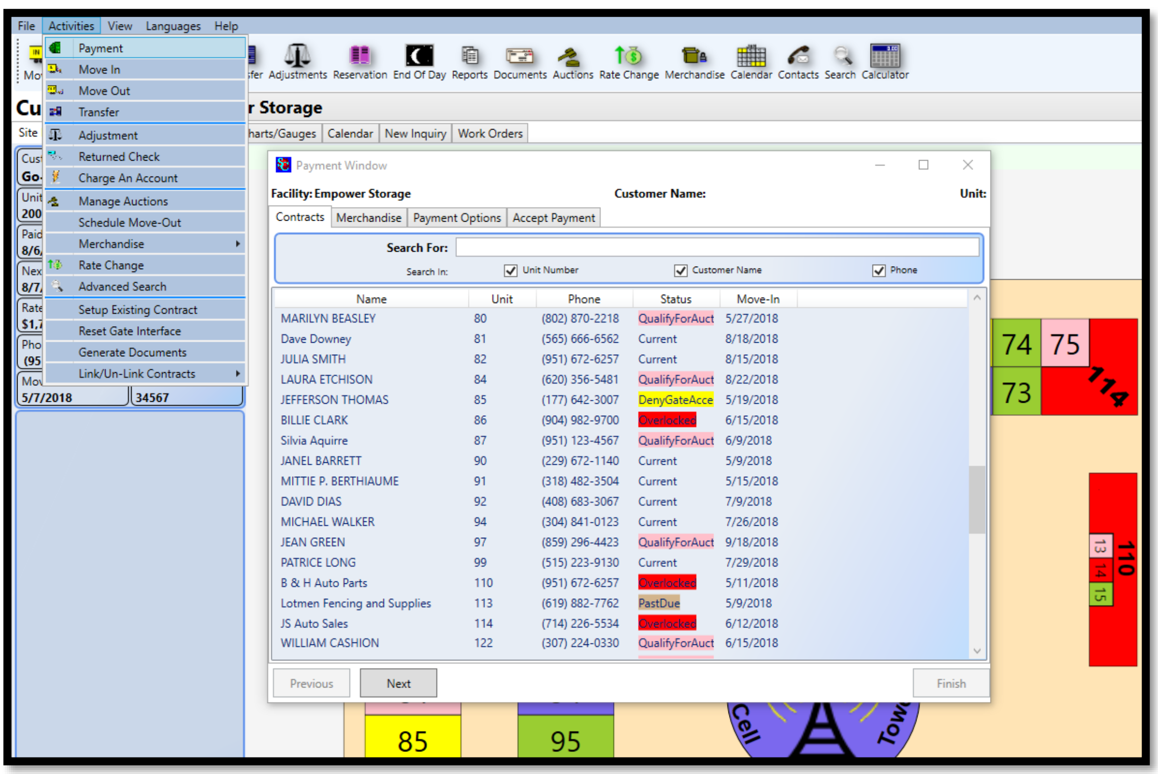
Payments can be processed in several different ways depending on user preference. Regardless of the payment method used; the actual payment process remains the same.

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

There are **five (5)** ways to process a payment on a customer account. You can select from any of the five methods that you feel most comfortable with. All 5 methods work the same way and will deliver the same result.
We will start by showing you the location and how to start the payment process for each of the five payment methods.

Payment Methods

Using the Activities drop down menu:



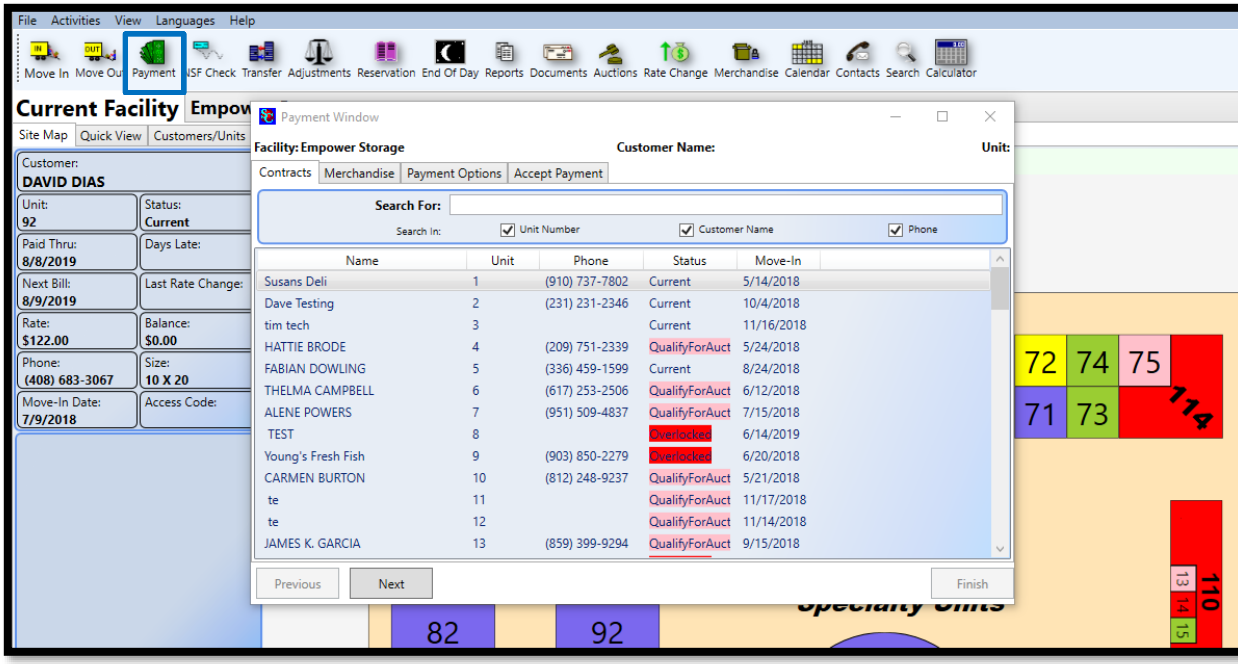
Click on the **Activities** drop down menu item located at the top of the Storage Commander main screen and select **Payment** from the list.

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

Using the Toolbar payment icon

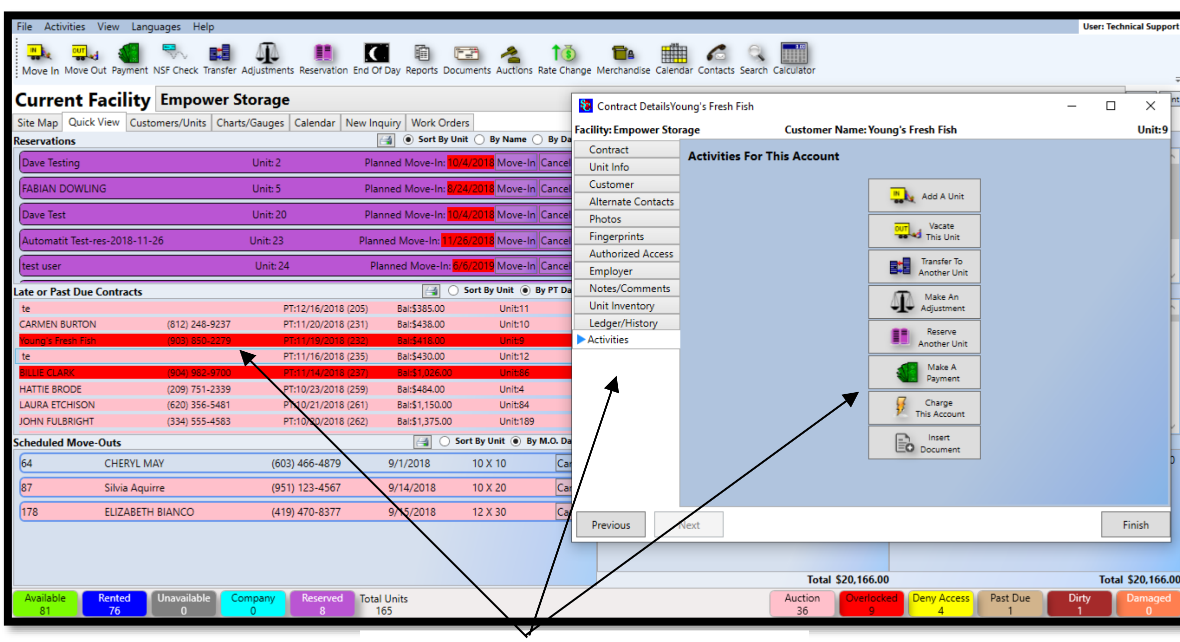
Click on the Payment icon in the Toolbar and select the customer from the Contacts list.

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



Using the Quick View screen

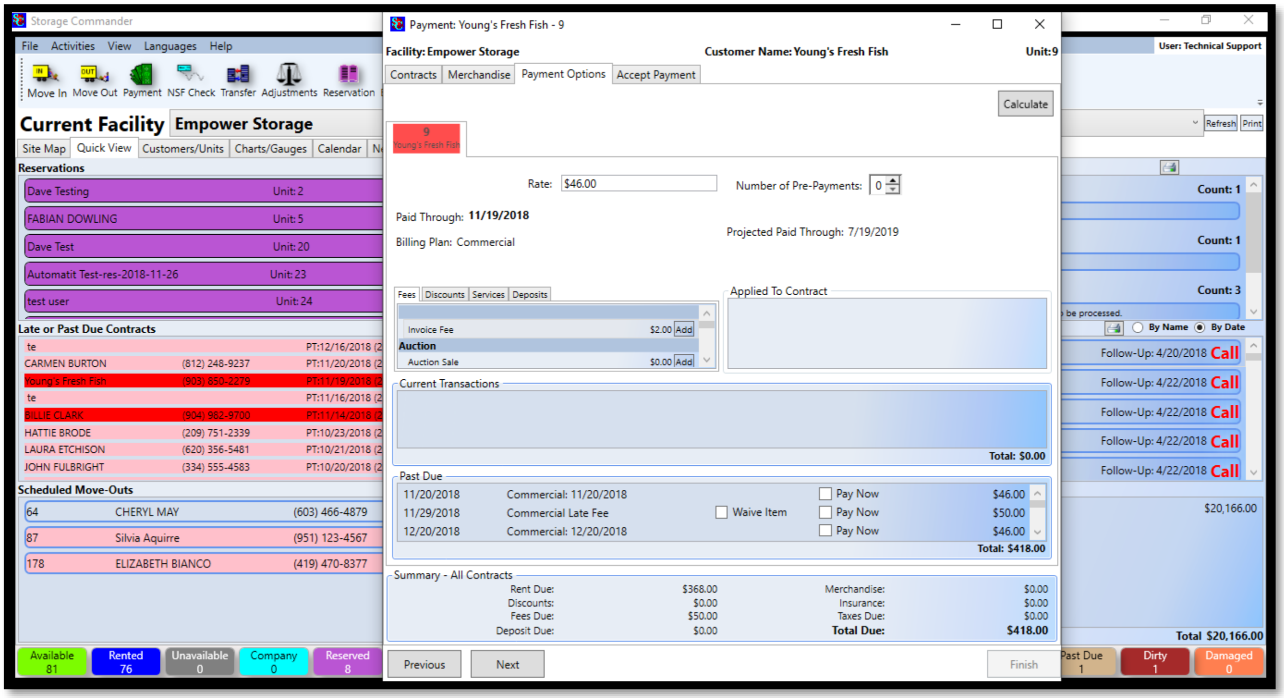
The Quick View screen will list all customers who are in a late or past due status. To make a payment on a customer through this screen, double click on the customer's name to open the Contract Details screen. From the Contract Details screen click on the **Activities** button, now click on the **Make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



Double click on the customer's name and select **Activities** / **Make A Payment**

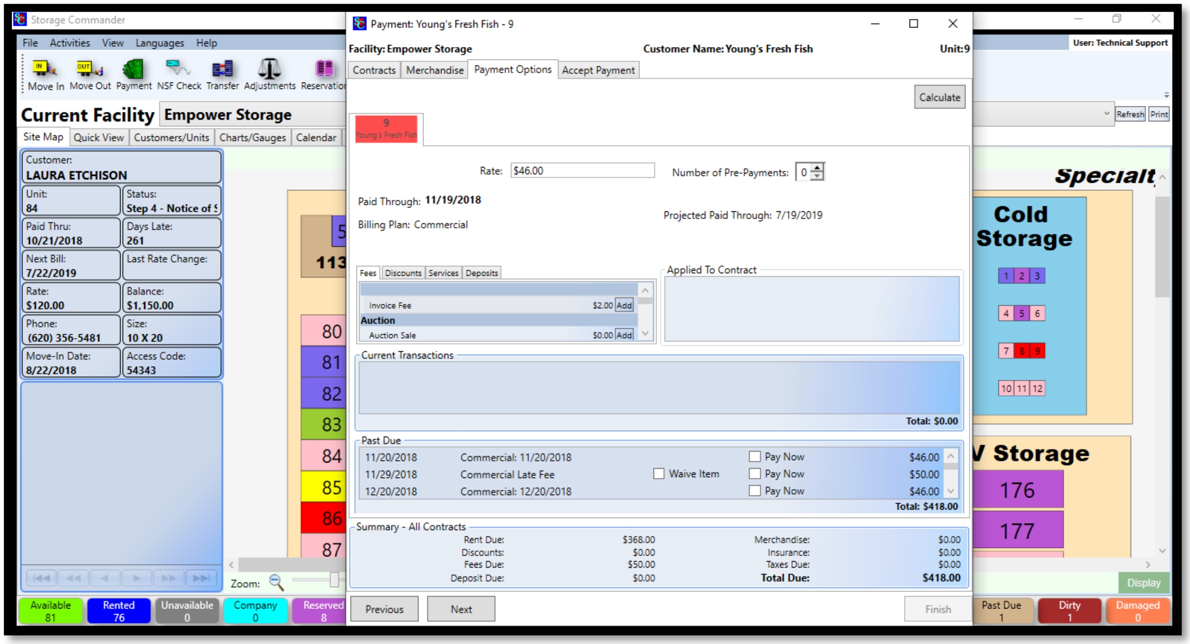
Using the Customers / Units screen

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 **Contract Details** screen click on the **Activities** button followed by the **Make A Payment** button to open the **Payment Options** screen.



Using the Site Map.

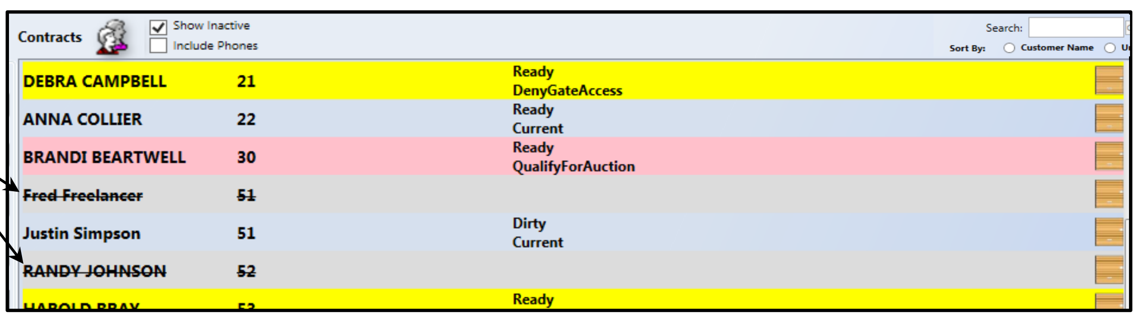
To use the site map for processing a rent payment, locate the customers unit on the site map and double click on it to bring up the **Payment Options** screen.



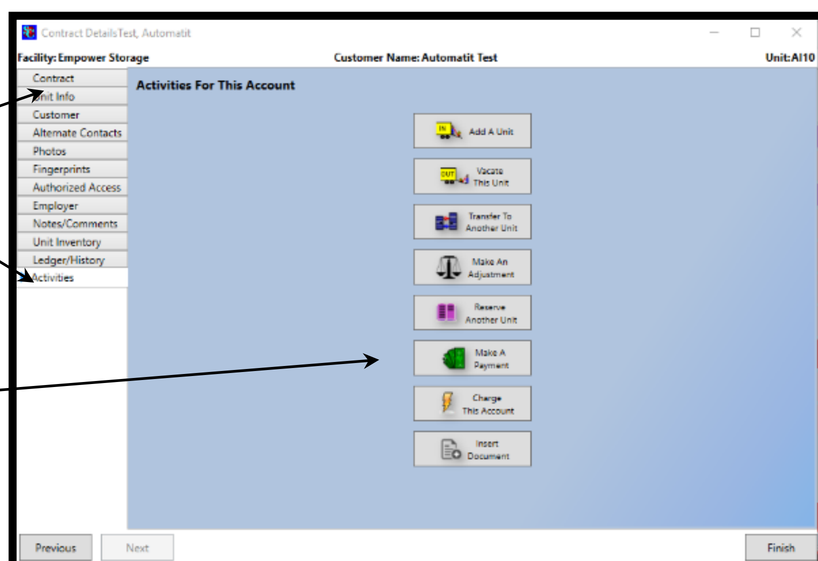
Paying on an Inactive (Moved Out) Customer

To enter a payment on a customer who has moved out of the facility, click on the **Customer / Units** tab, select **Show Inactive** and locate the customer in the contacts list (inactive customers can be identified by a line through their name). Click on the customer's name to open **Contract Details** and select the **Activities** button. If the customer was moved out with a balance due there will be a button **Make A Payment** available in the **Activities for This Account** screen, click on the **Make A Payment** button to process the payment.

Inactive (Moved Out) customers



Single click on the customer's name to open the **Contacts Detail** window. Click on the Activities button to proceed to the next screen.



Click on the **Make A Payment** button to proceed to the payment screen

Payment Options

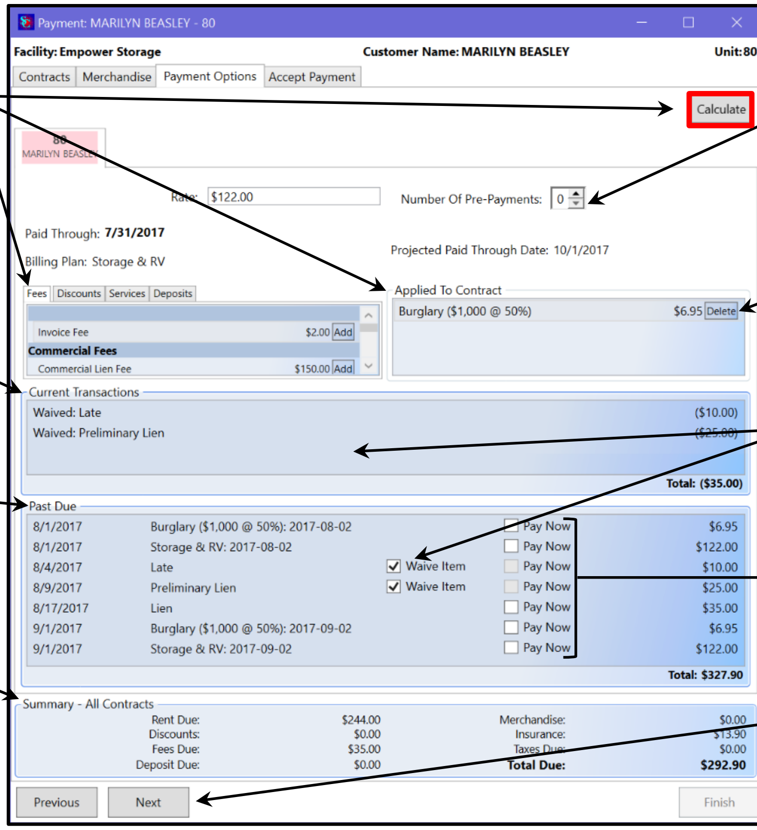
After the customer has been selected the **Payment Options** screen will open. From here you can set the number of payments that will be processed against the customer account. You can also apply additional **Fees**, add **Discounts**, add **charges** for **Services**, or attach additional **Deposits**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

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

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

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

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



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

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

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

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

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

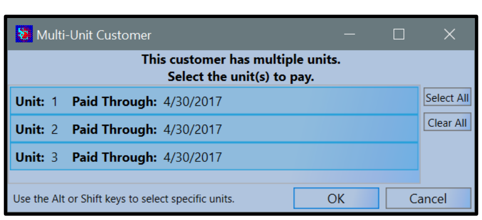
Selecting Payment Order

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

Multi-Unit Payment

Selecting a customer who has multiple units that have been linked together, will bring up the **Multi-Unit** payment selection screen, displaying all units that are associated (linked) to this 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.

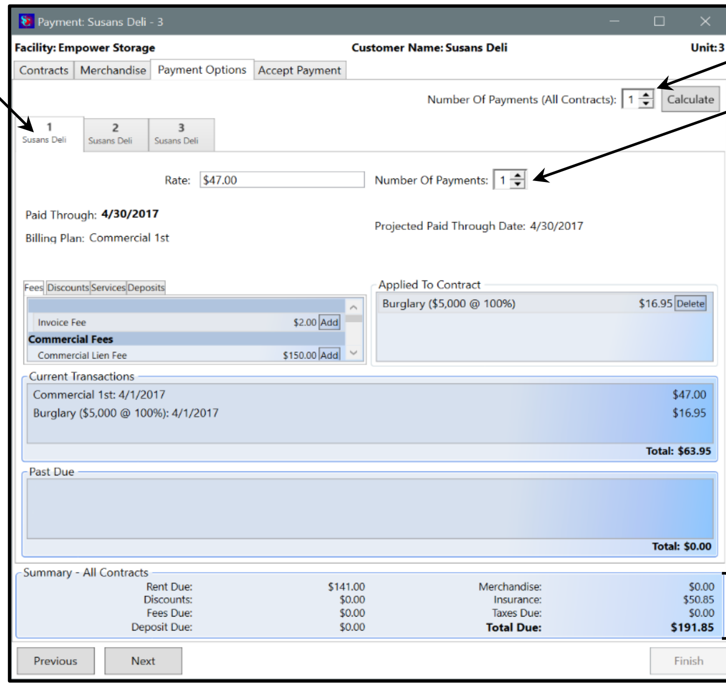
Once you have selected the units for payment click on the **OK** button to proceed to the **Payment Options screen**.



NOTE: To link contracts together, navigate to the Activities drop-down and select Link/ Unlink Contracts.

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

Clicking on a Unit tab will display the payment details for



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

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

Processing a Payment

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

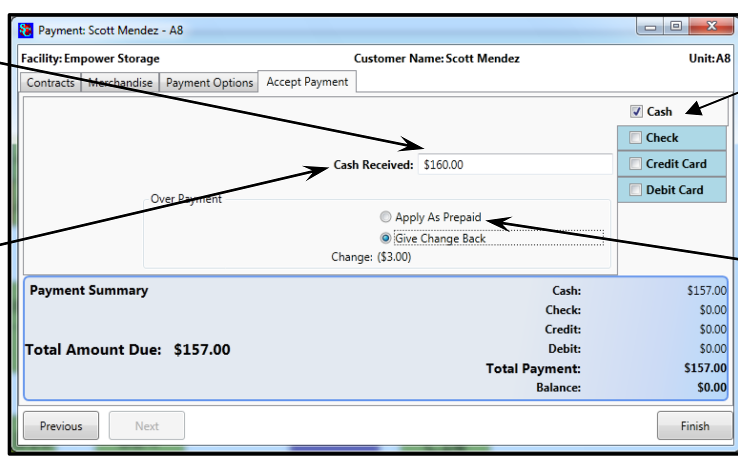
Cash Payment

If the payment received is lower than the balance due, the Balance field will show the remaining balance on the unit. If the payment received is more than the balance on the unit, an **Over Payment** box will appear. You have two choices as to how to account for this over payment; **Apply as Prepayment** will post the over payment credit as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit. **Give Change Back**, will calculate the difference between the amount due and the amount being received, and display the result as **Change**.

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

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

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



Select **Cash** for cash payments.

If cash received exceeds what is due, select the over payment amount as Prepaid rent or Change to be returned to customer.

Check Payment

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

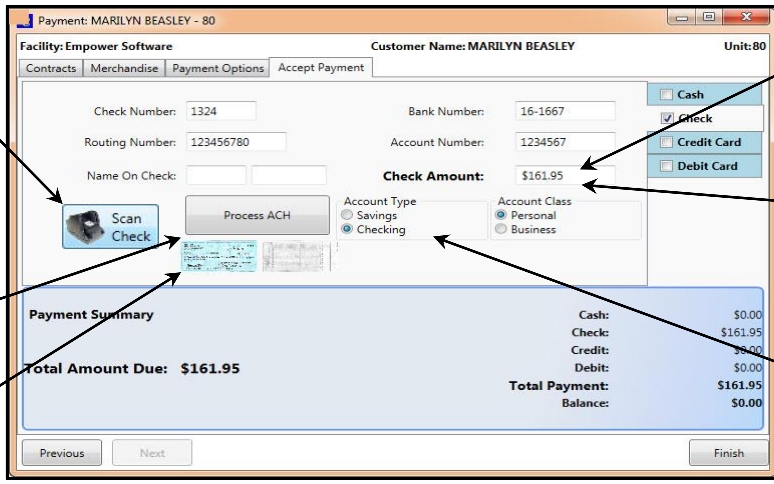
If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.
The check number, account number and bank routing numbers can be automatically entered into the check payment screen by scanning the check.

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

If a check scanner is installed, an icon of the scanner will be displayed. Click on the icon to scan the check.

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

When the check has ran through the check scanner an image of the check is added to the customer account



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

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

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

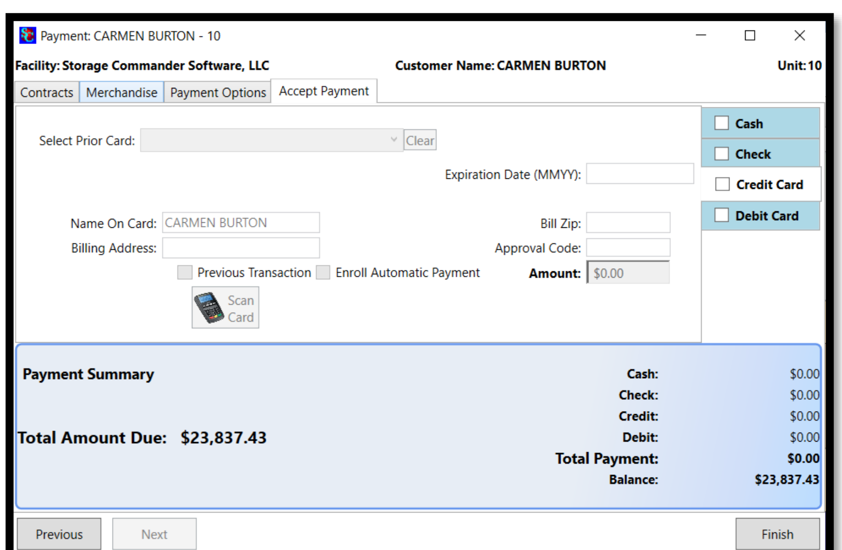
Credit Card Payment

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

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

Storage Commander will **retain** the last three successful credit card transaction made on a customer account and allow you to use the same credit card from any of the **past three transactions** towards a new payment.

To use this feature, go to **the Select Prior Card** field and click on the drop-down arrow to display the last three credit cards used on this account (Note that you can only see the first and last 4 numbers on each card), **select the card** that will be used and continue with the payment.



Processing a Credit Card Payment from a Standalone Terminal

If you are using a standalone credit card terminal to charge a card and would like to record the payment in Storage Commander, or if you accept credit card payment over the phone, you can manually enter the credit card information into the credit card payment screen. Using this methos allows Storage Commander to record the payment as a credit card transaction in the customer payment history and also maintain consistency throughout the financial reports.

After charging the card through the side terminal, you can manually enter a ***credit card payment*** by selecting **Previous Transaction.** Enter the credit card number in the **Card Number field, Name on Card, Billing Address, Expiration Date, Billing Zip** code and the **Approval Code.**

NOTE: The last four of the credit card number is the only numbers required in the Card Number field.

Posting a Credit Card Payment Without Charging the Card

To record a credit card charge transaction without charging the card (you will use this method if you use a separate credit card terminal for charging credit cards) select **Previous Transaction** and manually enter the last four digits of the credit card number into the **Card Number** field, enter the **Name on Card**, **Billing Address**, **Expiration Date**, **Billing Zip** code and the **Approval Code**. Click on the **Finish** button to complete the payment transaction.

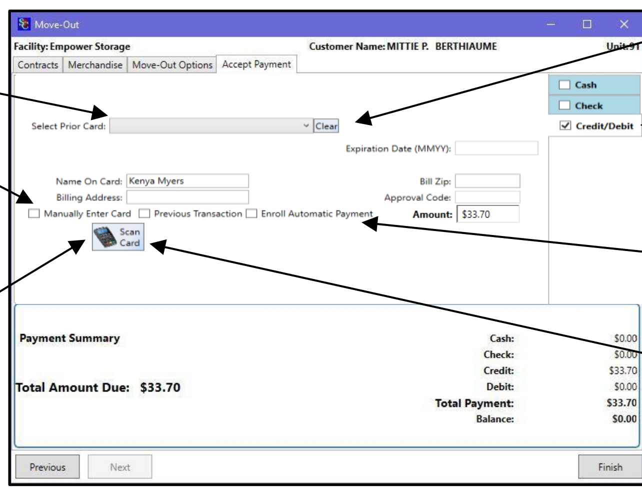
Removing a Credit Card from Card on File List

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

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

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

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



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

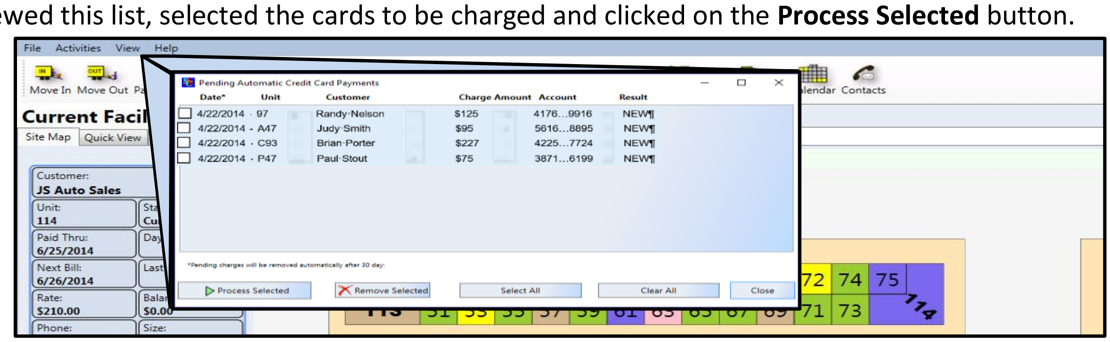
Select **Credit Card** as the payment type.

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

Once the credit card has been scanned or the credit card number has been manually entered, click on **Scan Card** to process the payment.

Processing Auto Credit Cards

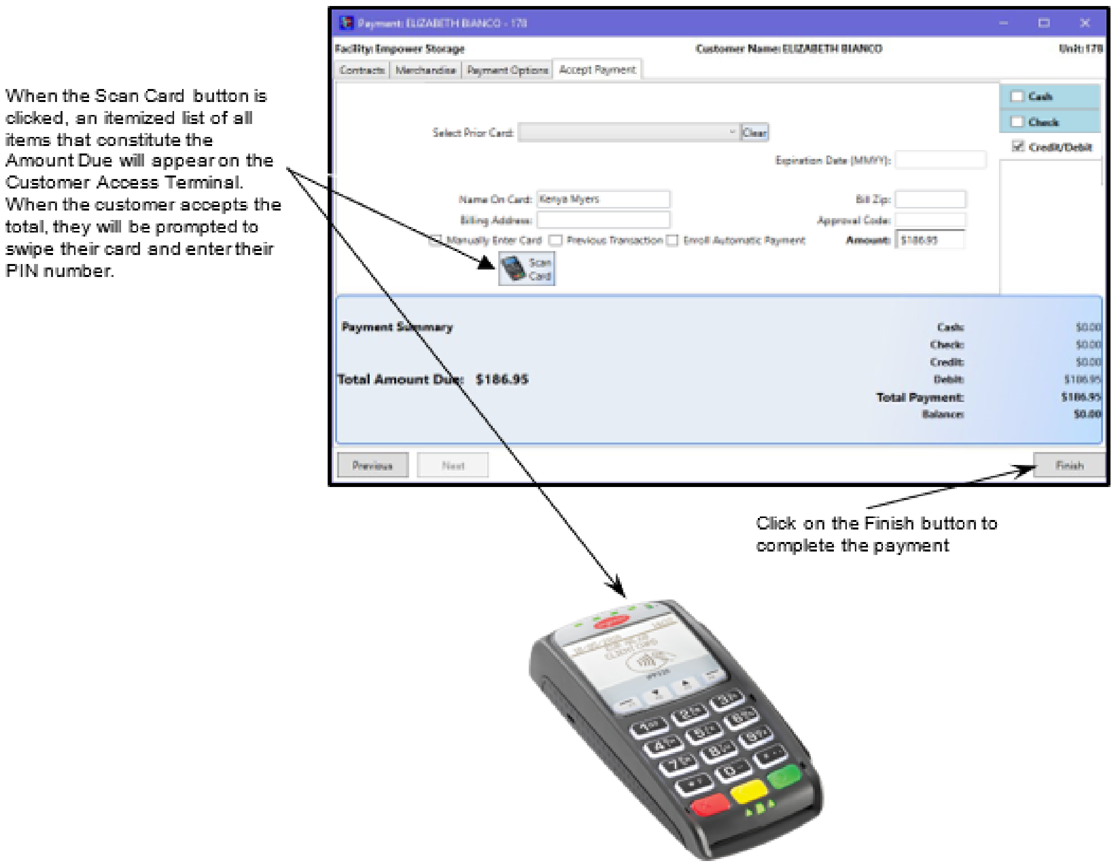
As ***End of Day*** is ran customers who have elected to have their rent payment automatically charged to a credit card are compiled and put into the **Pending Auto Credit Card Payments** screen. This screen is located under the **View** drop down menu under **Pending Auto Credit Card Payments.** The cards are not actually charged until you have reviewed this list, selected the cards to be charged and clicked on the **Process Selected** button.



Debit Card Payment

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

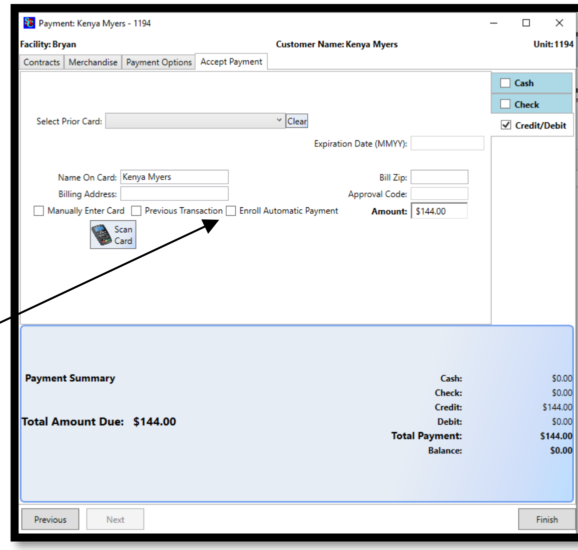
If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.



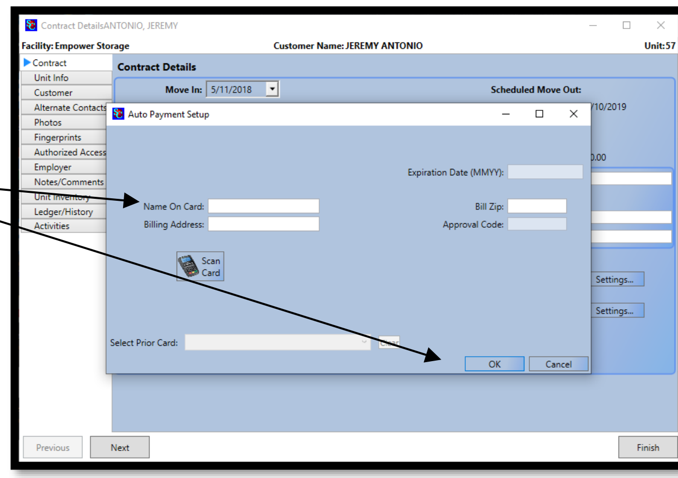
Setting up Auto Payments

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

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



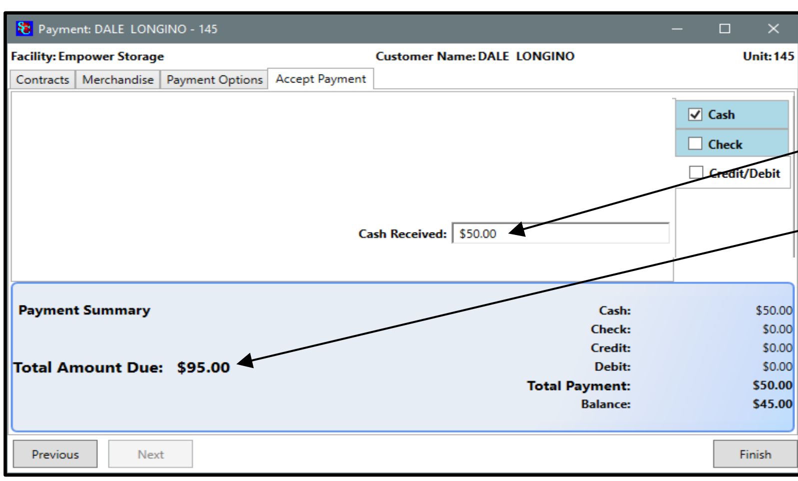
If this card will be used to automatically pay rent each billing cycle, select **Enroll Automatic Payment.**



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

Partial Payments

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



Enter the amount of the Partial Payment here.

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

The Total Payment shows the amount of the Partial Payment.

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

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

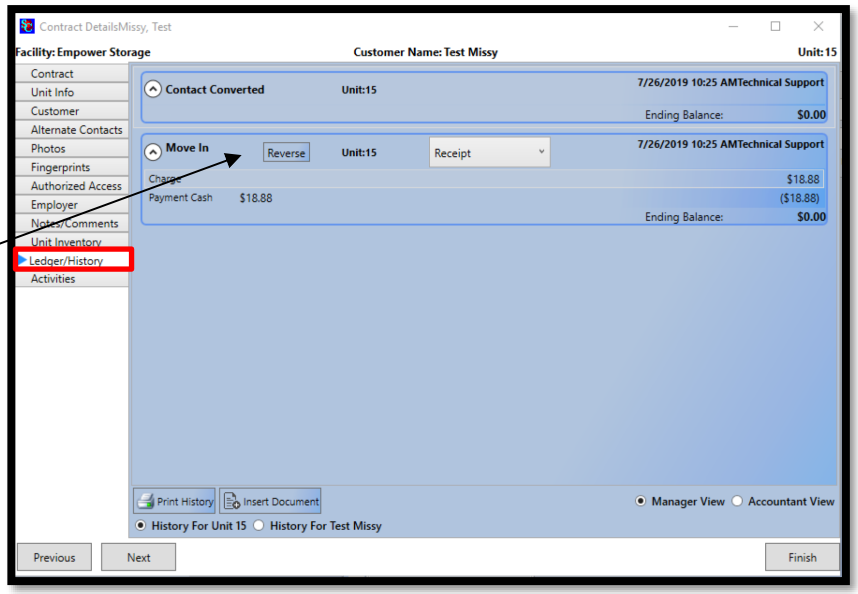
NOTE: Partial payments will be applied towards the oldest balances on the account. This is typically rent but could be fees or insurance if these balances are older.

Reversing a Payment

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

From the **Customer/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 right click on the payment transaction item, click on the Reverse Transaction item in the action box and select OK at the prompt to proceed. A **Reversed Payment** entry will be posted to the customer ledger, and the amount of the payment will be charged back to the account.

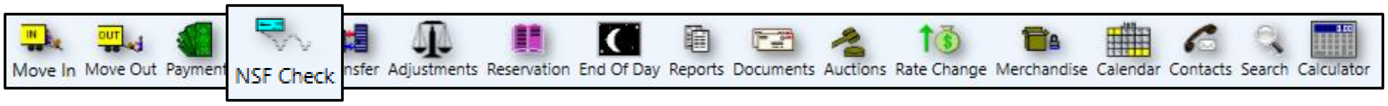
Click on the **Ledger/History** tab, locate the Reverse button and select to reverse payment.



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

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

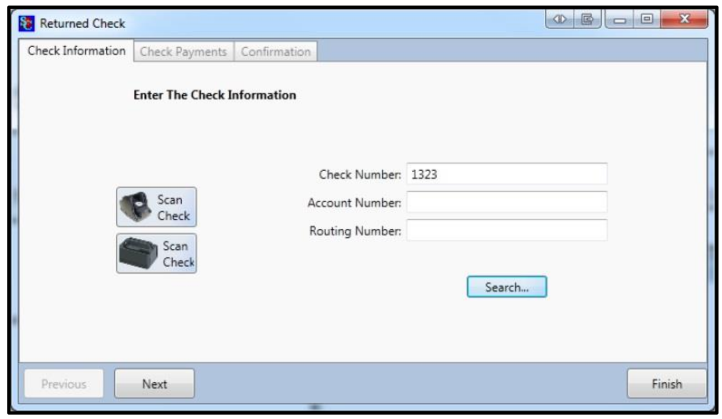
Processing Returned Checks (NSF)



Initiating a returned check will cause Storage Commander to charge back the customer account with all items that were paid for when the check was being processed. When the returned check process has been completed, the customers' account will be updated showing the charge backs, they will be placed in the appropriate late status, and their account history will be updated. The returned check activity will be recorded in the ***Facility Summary report***.

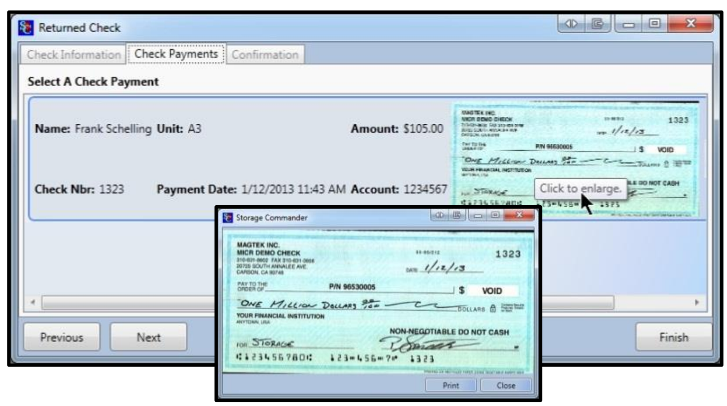
Opening the Returned Check screen

The Returned Check process can be initiated by clicking on the **Activities** drop down menu, or by clicking on the **Returned Check** button in the Tool Bar. Once selected, the **Check Information** screen will appear. Enter the search information, or if you have one of the approved check scanners, scan the check to proceed to the **Check Payment** screen.

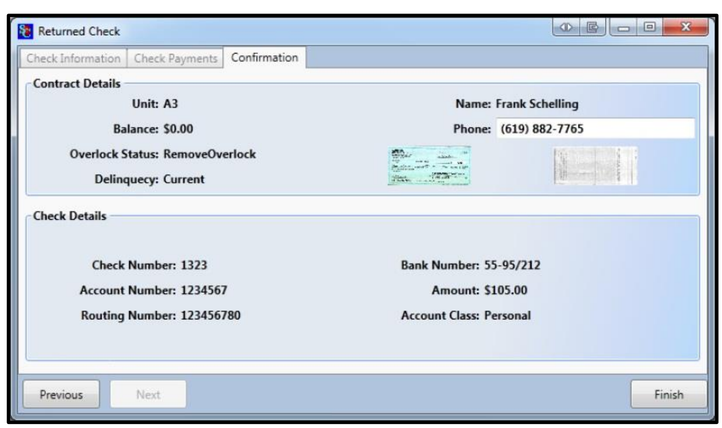


The ***Check Payment screen*** will show the details of the check being returned. If the check was initially processed using the Multipurpose Scanner, you will be able to see an image of the check. If you click on the image, you can view or print an enlarged copy of the check.

Once you have verified that you are processing the correct check, click on the **Next** button to proceed to the Confirmation screen.

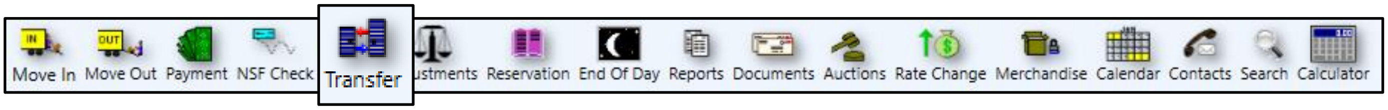


Verify that the correct check is being processed as a returned check. Click on the **Finish** button to complete the process.

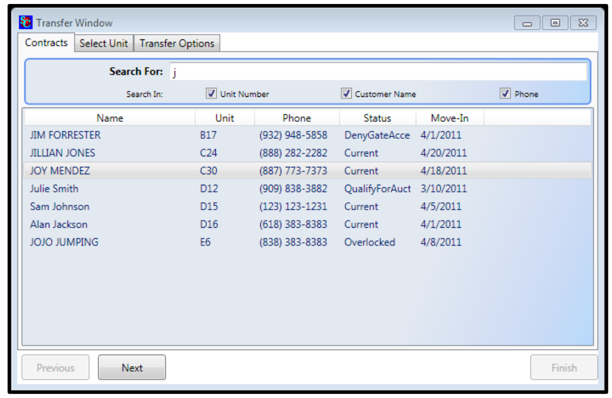


NOTE: Once this process is complete, the check value will post back to the customer's account, an NSF notice will be generated AND IF your facility charges an NSF fee it will automatically be charged.

Transfer



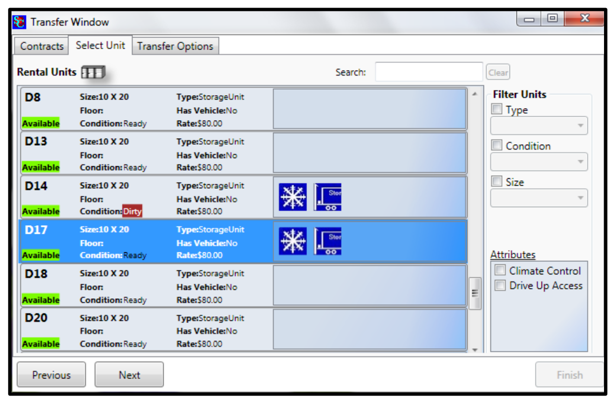
Customers can be transferred from their current unit to another unit through the ***Site Map*** by Right clicking on their unit and selecting **Details | Activities | Transfer**. You can also initiate a transfer from the Activities drop down menu, or through the Quick View and Customer / Units screens.



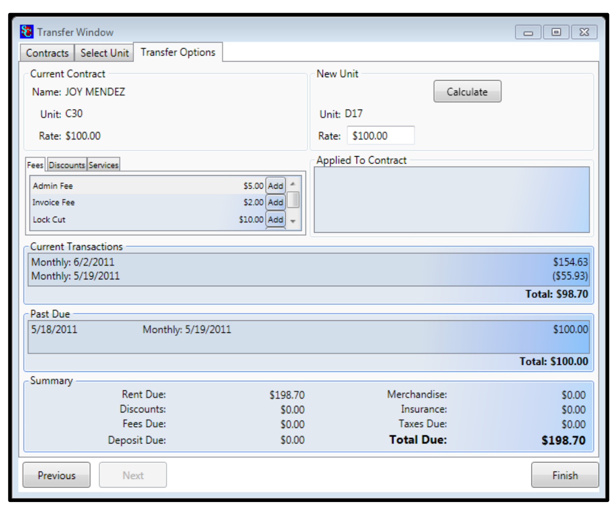
Click the **Transfer** Button in the Tool Bar to open the Transfer Window.

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

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



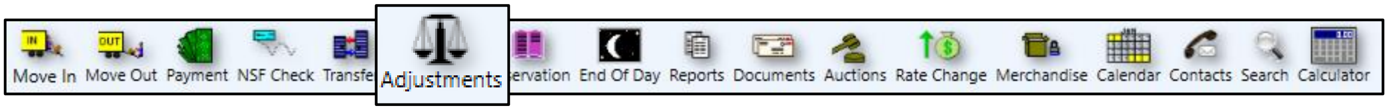
Select the Unit that you wish to transfer the customer to. Once selected the Unit will become highlighted. Click **Next** to Proceed.



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

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

Account Adjustments



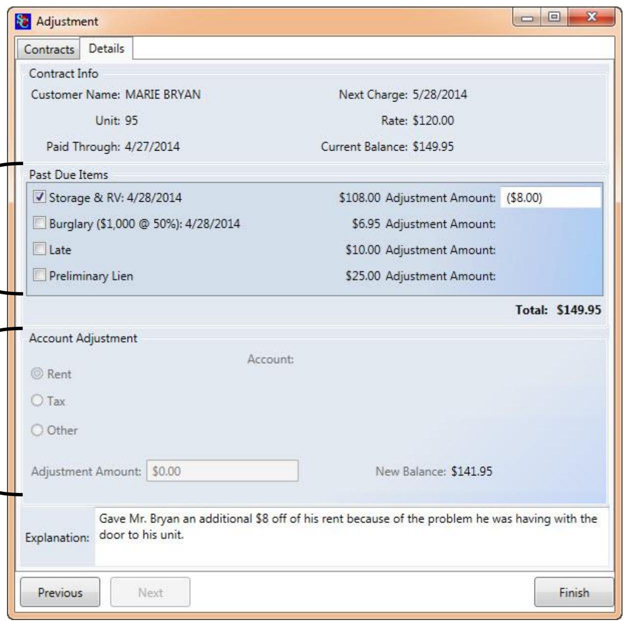
The adjustment function allows changes to be made against balances on a customer account.
Adjustments can be initiated through the button bar by clicking on the Adjustments button, or by right clicking on a customer's name and selecting **Details | Activities | Adjustment**.
Once an account has been selected the **Adjustment** screen will open. From here you will see a list of all account types that have a current balance ($0 balances on account items will not be included in the **Past Due Items** list).

Adjustment Types

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

To reduce the balance on past due items, select the item and enter the offset amount into the corresponding field with a negative OR parenthesis.

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



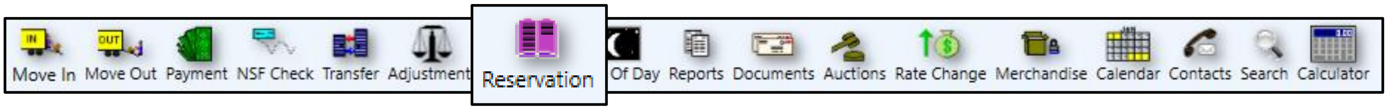
Past Due Items

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 allows global adjustments to be made on ***Rent, Tax, Deposit & Insurance balances***. To increase the balance to any of these categories, select the category and enter the amount of the increase in the Adjustment Amount field.
The **New Balance** will automatically update indicating the result of all adjustments.
Enter an explanation for the adjustment and click on the Finish button to complete the adjustment.

Reservation



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

The reservation process is much the same as the move-in process, as the procedures and screens for entering the customer information are almost identical. The only difference between two processes is that setting up a reservation requires you to enter a "**Planned Move-In Date**" rather than a "**Move-In Date**".
Other differences are that you cannot assign recurring Fees, Discounts, or Services to a reservation.
If you require a reservation deposit you must assign a **Billing Plan** to the reservation that includes a reservation deposit (billing plans are created in the Configuration Manager).

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

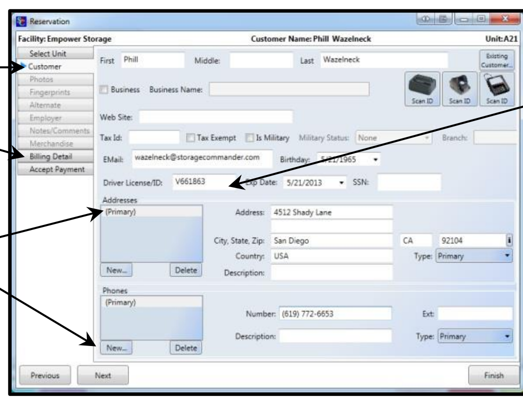
Starting the Reservation Process

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

Customer Tab

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

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

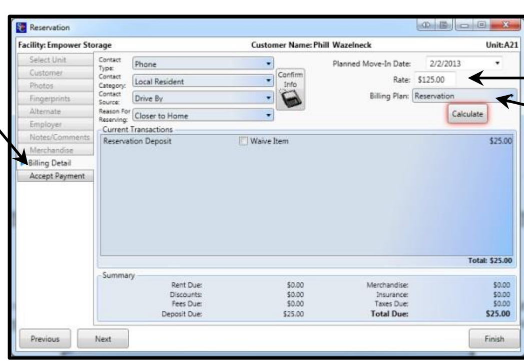


If the driver license ID conforms to the AAMVA standard, and you have installed an id scanner, a button showing the installed scanner will appear. Click on this button to scan the ID and have the customers address information automatically entered the move-in screen.

Entering a Planned Move-In Date & Reservation Deposit

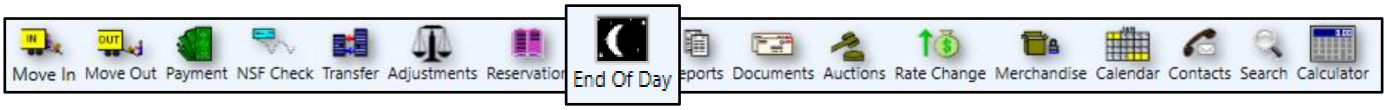
From the Billing Detail screen enter the intended move-in date into the **Planned Move-In Date** field. If a reservation deposit is required, you must select a **Billing Plan** that includes a reservation deposit.

Click on the Billing Detail tab



Enter the Planned Move-In Date
Select a Billing Plane that includes a reservation deposit

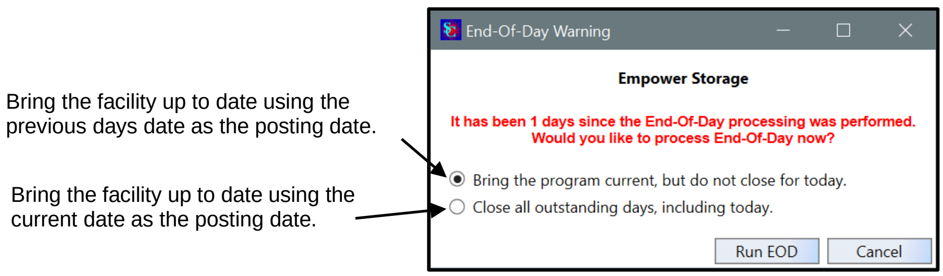
Running End of Day



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

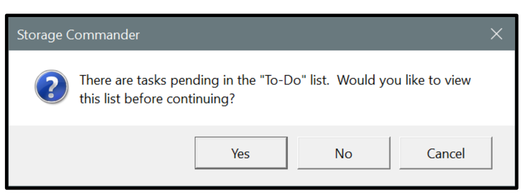
The advanced functionality built into the ***End of Day*** processes allow you to run ***End of Day*** while using the Storage Commander Management system. In other words, you can start the ***End of Day*** process, let it run in the background while you continue to take ***payments, move-in, move-out***, or any other management function while the ***End of Day*** is running.

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



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

When you click on the ***End of Day*** icon in the tool bar, the program will look to see if there are any outstanding actions in the systems ***"To Do" list***. If it detects that there are action items that need to be reviewed prior to closing the facility a message box will be displayed allowing you to interrupt the end of day process so that you can review the action items.

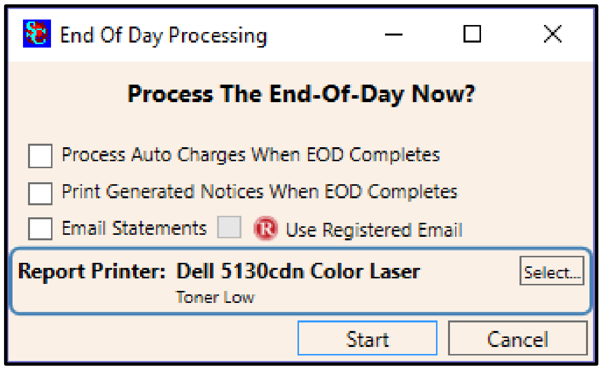


Starting End of Day

Stand-Alone version only

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 choose to use a different printer, click on the Select button and select a printer from the list of available printers.

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



Process Auto Charges when End of Day completes

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

Print Generated Notices When End of Day Completes

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

Email Statements

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

Report Printer

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

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

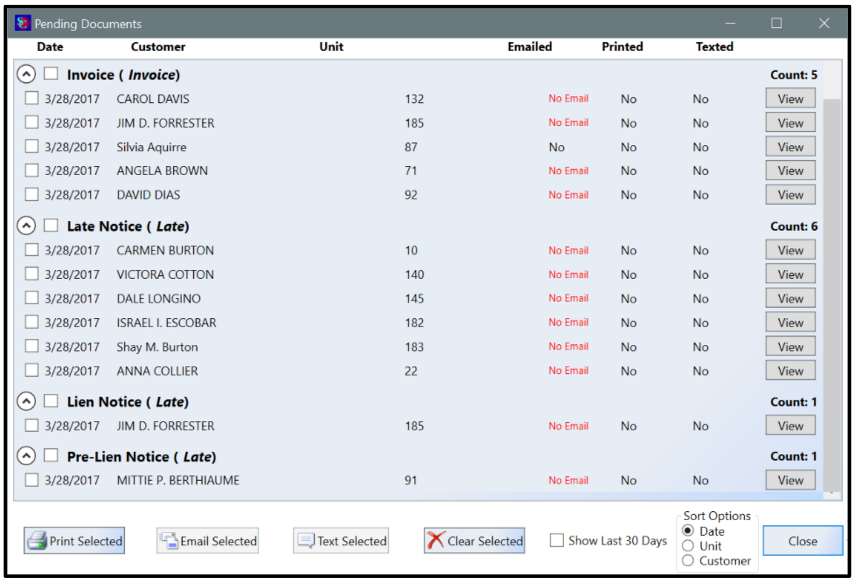
Printing Notices

During the ***End of Day*** process, notices (such as: late notices and invoices) are generated and passed to the ***Pending Documents Queue*** where you can review and select the documents prior to printing or emailing.

Notices will remain in the ***Pending Documents Queue*** until they are processed or cleared from the list. 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 clicking on the Show Last 30 Days check box located at the bottom of the Pending Documents screen.

Selecting Notices to Print, Email or Clear from the list

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



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:

- Runs ***End of Day*** automatically every day 365 days a year, keeping your accounts up to date.
- Allows ***On-Line payments, Move In, Move Out, & Reservations*** to be posted to an account after business hours.
- 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.

Reports

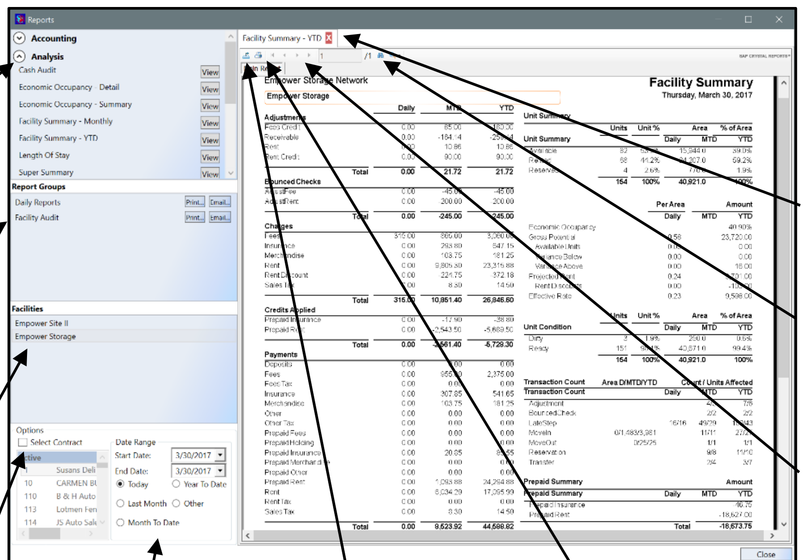
All reports are accessed from the Tool Bar by clicking on the **Reports** button. Once the Reports function has been selected the reports management window will open. From this window you can open and view reports by selecting the appropriate category and clicking on the View button associated with the 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 against a facility customer rather than the entire facility. Span reports across multiple facilities. Perform a data search within a report. Export reports to different file formats, such as PDF, Excel, CSV as well as many other file formats.

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

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

Reports can be generated spanning one or more facilities.

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



The Tabs will show all reports that are currently open.

To quickly find a customer in a multi-page report, click on the **Find Text** icon and enter the name of the customer.

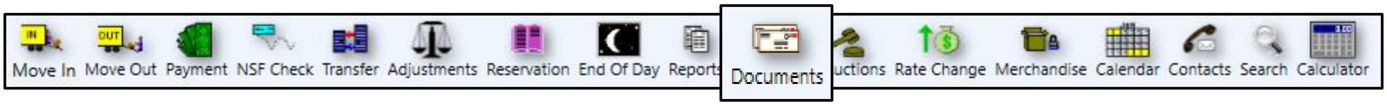
Click on the **Forward** and **Back** buttons to move through a multi-page report.

Select the date range to be used in generating the reports. Use **Other** if you need the reports to cover a specific date.

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

Click on the **Print** button to print

Documents Feature



All document that are automatically generated through the Storage Commander program will be displayed in the **Pending Documents** window. This window will list all documents that have been generated from the last time ***End of Day*** was ran and are considered active notices. To see all documents that have been generated over the past 30 days, click on the **Show Last 30 Days** selection box (located at the bottom of the Pending Documents window).

All documents are arranged by category, selecting the check box to the left of the category name will select all documents under that category, whereas selecting the check box next to an individual's name within a category will limit the selection to only individuals whom you have placed a check mark in their selection box

Once the selection process has been completed you have the option of **Printing** the selected documents, **Emailing** the selected documents, or **Clearing** all selected customers.

Viewing Documents & Notices

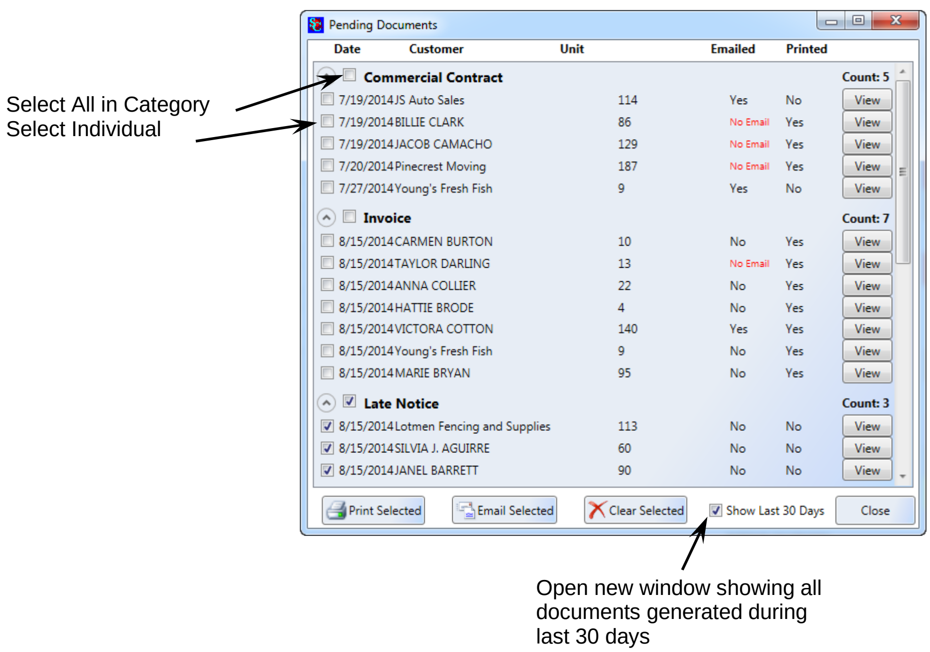
Click on the View button to open the document using a PDF reader. You do not need to select a document to view it.

Printing Documents & Notices

Referencing the information above, when printing selected customer documents, once the document is printed it will be removed from the active document list. To see or to reprint the document using the Documents feature, click on the Show Last 30 Days.

Email Documents & Notices

Emailing documents works in much the same was as printing documents, wherein you select the customer you wish to email documents to, once selected click on the **Email Selected** button to initiate the email process.



A red **No Email** notice signifies no email address has been entered into the customer account information. To add an email address to a customer account, go the **Contacts Details** screen for the customer and select the **Customer** button, when the customer information screen opens, enter the email address in the **Email** field.

Generating Documents, Notices & Text Messages

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

Manually Generate a Notice

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

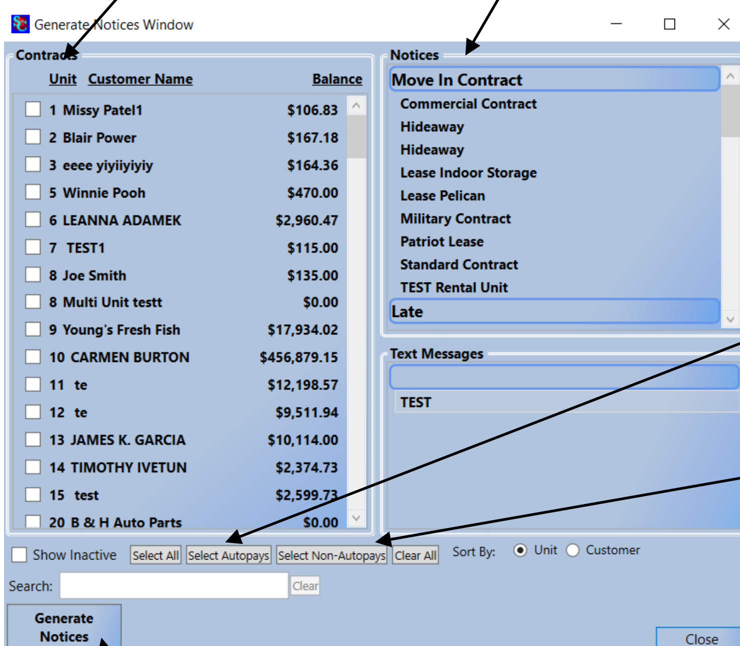
Customer selection column.

Notice selection column.

Click on a check box to select a customer.

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

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

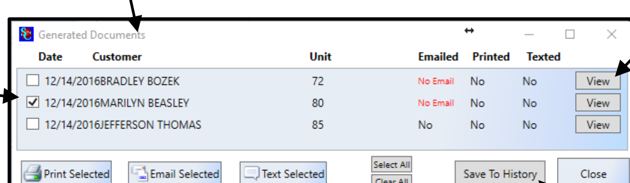


Select **Auto pays** to filter by just customers who are enrolled in autopay**.**

Select **Non-Auto pays** to filter by customers who are NOT enrolled in autopay.

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

Click on a check box to select a customer



Click here to pre-view the document.

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

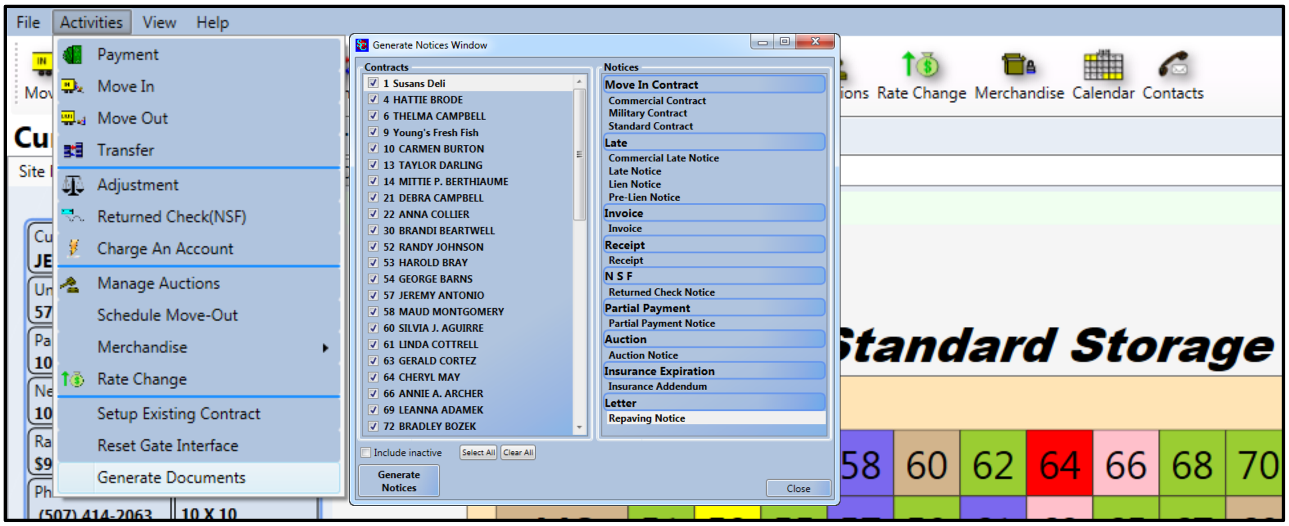
Click here to save a copy of the document to the selected customers history.

Creating Letters

A letter can be created within Storage Commander through our integrated word processor or by using Microsoft Word to create the letter. If you choose to use Microsoft Word to draft the letter, you will need to import the letter after it is drafted into the integrated word processor in Storage Commander.
For detailed instructions on how to create letters and notices, please refer to the **Configuration Manager** manual under the section "**Notices**"

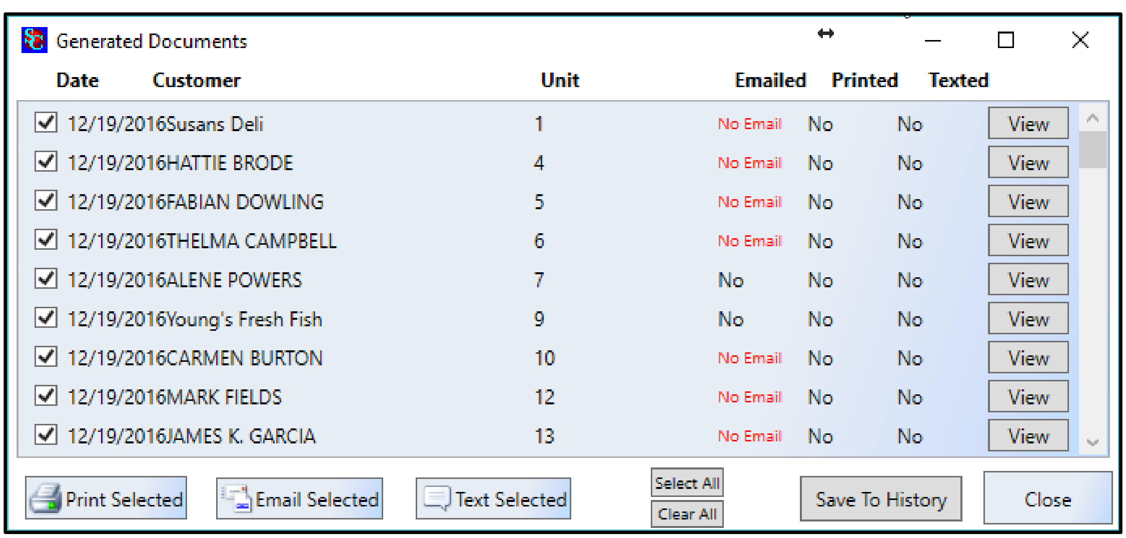
Selecting Customers

From the **Activities** drop down menu, select **Generate Documents** to open the Generate Notices Window. From this window you can select individual Contracts (Customers) or you can click on the **Select All** button to select all customers in the list. Select the **Letter** category from the **Notices** column and select the appropriate letter from this category. When the letter and customers have been selected click on the **Generate Notices** button to create the letters and move them to the **Generated Documents** window.



Select the customers to print or email the letter to or click on the **Select All** button to select all the customers in the list. You can preview the letter prior to printing or emailing by clicking on the **View** button for a specific customer. If you would like to attach a copy of the letter to customer history, click on the "**Save To History**" button.

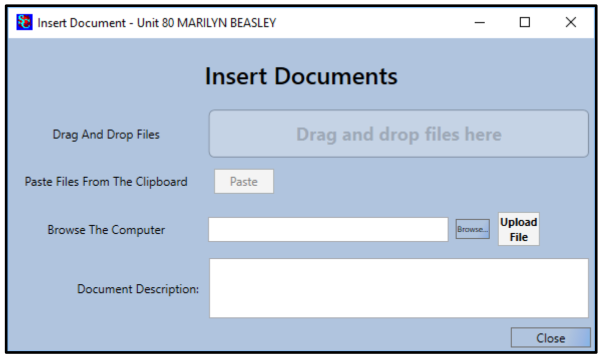
Note: To view customer history, click on the Ledger/History tab in the customers Contract Details window.
When you are ready to print or email the letter, click on the appropriate button at the bottom of the screen.



Importing Documents

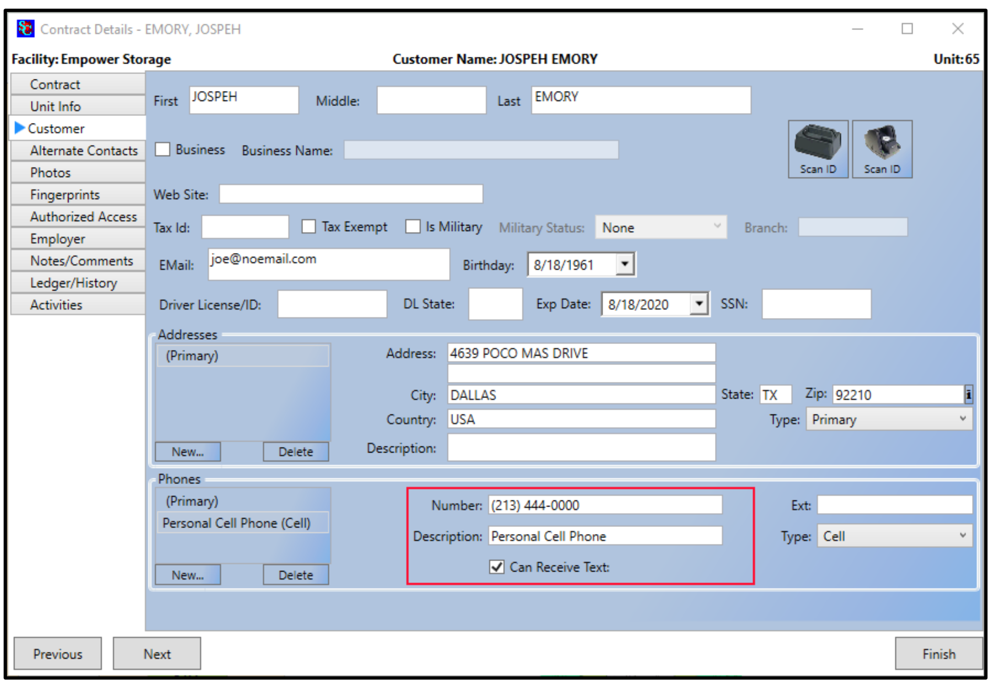
The Insert Document feature allows documents or images (pictures) to be copied to a customer's history file. Once the document is attached to the account it can be viewed, emailed or printed at any time.

Documents can be inserted using one of two methods
Opening the **Activities** window in a customer account click on the **Insert Document** button, this will open the Insert Documents window.



Texting

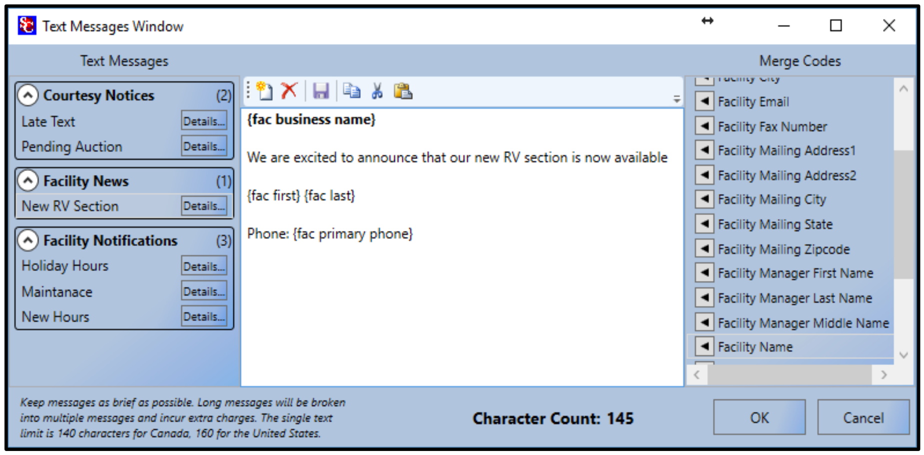
The texting feature allows you to send short (160) character messages to one our all customers in your facility. **Text messages are created** in the ***Configuration Manager*** and made available in Storage Commander as pre-defined text messages that can be selected from a list.
Text messages will only be sent to customers who have ***opted*** to receive them. To set a customer up to receive text messages, open the **Contract Details** window for the customer and click on the **Customer tab**. In the telephone section, enter the customers cell phone number and click on the **Can Receive Text** check box.



Creating Text Messages

Open the **Text Messages** screen from the **Company Setup** section of the **Configuration Manager**.

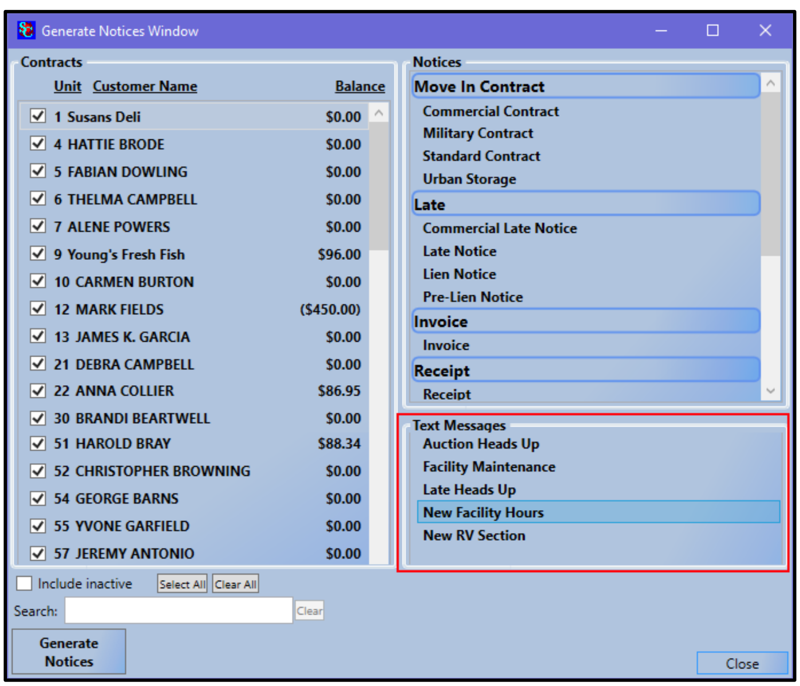
Create New Text Message
Delete Current Text Message
Save Current Text Message
Past selected text
Cut selected text
Paste text from Windows Clipboard



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

Sending Text messages using Generate Documents

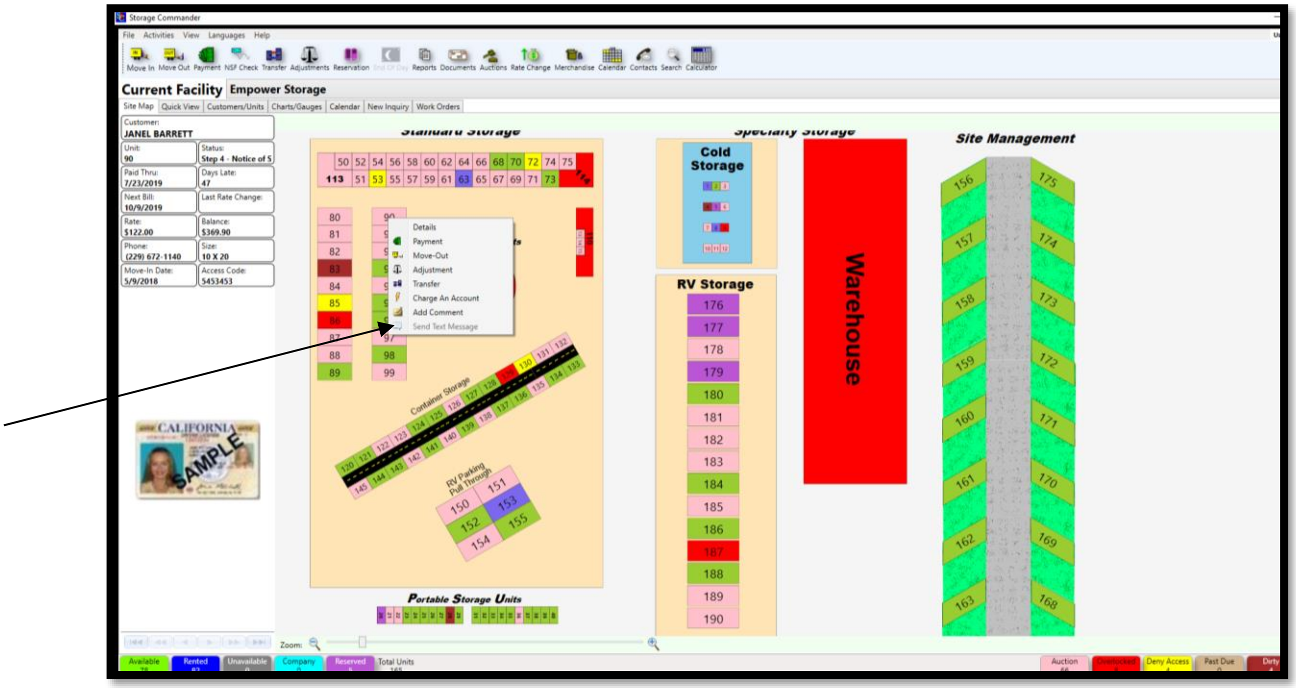
Click on the **Activities** drop down menu and select **Generate Documents** from the menu items. You can select individual customers from the list by clicking on the check box adjacent to the customer's name. To select all customers, click on the **Select All** button at the bottom of the customer list.



To view and select inactive (moved out) customers, click on the **Include inactive** check box. Inactive customers will be identified by a line drawn through the customer's name.
Once the customer(s) have been selected, locate the text message to be sent from the list of available text messages and click on the Generate Notices button to send the text message.
***NOTE:** Free form (manually entered) text messages are not supported.*

Sending a Text through a customer account

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's 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**.



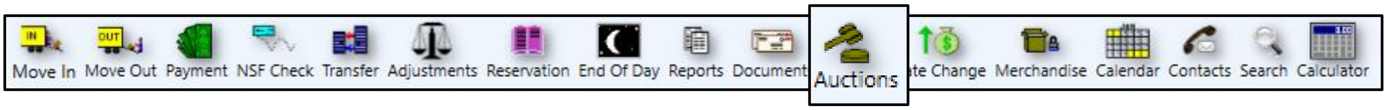
Adding a Text message to a Late Step

Text messaging can provide your customers a whole new level of convenience by pre-alerting them of pending late charges through texting, or by supplementing a late notice through a follow up text message.

To add text messaging to a Late Step, ***open*** the **Configuration Manager**, locate the **Accounting** column and select **Lien Status**.

Locate the late group that you will adding the text message to and click on the **Add Step** button.
Click on the **Send Text Message** followed by clicking in the Document Name field and select the pre-defined text message from the list. Once the setup is complete the text message will be automatically sent in accordance with the late step parameters assigned to this late step.

Auction



The Auction cycle is determined by the settings in the ***auction late step***, which is setup in the **Configuration Manager** program. Once a customer is qualified for auction their unit will be listed in the **Quick View** screen under Late or Past Due Contracts, the **Site Map** will also indicate that they are in auction by changing their unit color to ROSE and including them in the **Auction** button in the legend bar.

Selecting Customer for Auction

Click on the Auction button in the tool bar or click on the Activities drop down menu and select Manage Auctions, to open the **Scheduled Auctions** window. This window will display a list of auctions that are already scheduled.

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

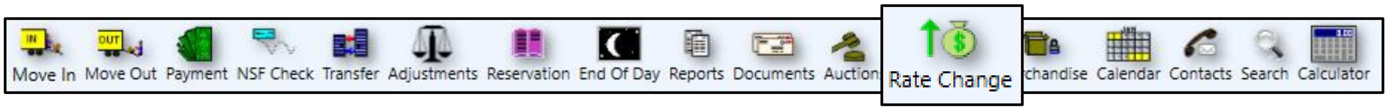
Reprint Auction Notice

Click on the Auctions button in the tool bar or click on the Activities drop down menu and select **Manage Auctions**, to open the **Scheduled Auctions** window. Locate the customer in the list and click on the **Print Notice** button.

Cancel a Scheduled Auction

Click on the **Auctions** button in the tool bar or click on the Activities drop down menu and select Manage Auctions, to open the **Scheduled Auctions** window. Locate the customer in the list and click on the **Cancel Auction** button.

Rate Change



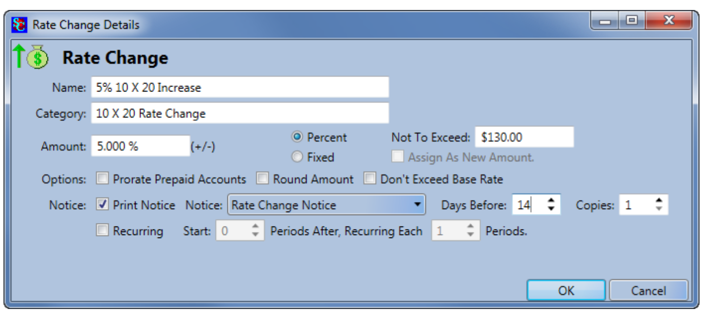
The ***Rate Change*** function allows rental rates to be increased or decreased based on the size of the units, unit attributes, move-in date, last rate change, and location. In addition, rate changes can be set to affect a single unit or a range of units and can be configured to occur on a specific date, or automatically apply after a preset duration (annual rate change). Customers that are affected by the ***rate change*** but have ***pre-paid*** for their storage unit, can be exempt from the rate change until their pre-paid credit has expired.

Creating a ***rate change*** is a two-step process, wherein the details of the rate change are entered in the first step (**Create Changes**) and the units/customers who will be associated with the rate change will be selected in the second step (**Apply Changes**).

The rate change function only applies to rental units that are occupied. Changing the rate of unoccupied units is done in the **Configuration Manager** under **Company Setup / Facilities / Rental Units / Unit Size / Rates**. The unit price entered this section will be considered the ***Master Default Rate*** for that unit size and configuration.
Whenever a unit is vacated the rate for the unit will return to this rate.
A detailed explanation of the two steps involved is explained below.

Setup Rate Change

From the tool bar click on the **Rate Change** button, you can also click on the **Activities** drop down menu and select **Rate Change**, to start the rate change setup process.



Name

Enter a name to identify the rate change.

Category

Entering a Category identifier allows rate change names to be listed under a specific category.
An example of this would be entering a Category name of 10 X 20 Rate Change and creating

Amount

Enter the amount of the rate change, either as an increase or decrease to the current rental rate (if entering a decrease to rent proceed the value with a minus (-) sign.
Select the amount (value) is to be based as a **(Percentage)** of the current rental rate, or as a flat dollar **(Fixed)** amount.

New Amount

Select this option if the value entered the Amount field will be the new rental rate (not an increase or decrease to the current rental rate).

Not to Exceed

This feature ***restricts*** the base rental rate of the affected units from exceeding the value entered this field, regardless of the amount of the increase in the rate change. An example of this would be:

Base Rate of 10 X 20 units is $120
Rate Change being implemented is $5.00
Not to Exceed is set to........................ $125

The result of this rate change would be as follows:
Any customer renting a 10 X 20 who is at or below $120, would receive the full $5 increase.
Any customer who is above $120 would only receive an increase of x$ to bring them up to the value entered the **Not to Exceed** amount (in this example; $125).

Prorate Prepaid Accounts

Used to configure the rate change to Prorate Prepaid Accounts. This function will charge the new rate on all units associated with the rate change. If some of the units have a pre-paid balance at the time of the rate change, the unit will be charged at the new amount at the time the rate change is activated. If this option is not selected, pre-paid units will remain at the old rate until their pre-paid balance has expired.

Round Amount

Select to set rental rates to a whole dollar amounts (only used on percent-based rate changes)

Notice

Select to print selected notice (x) days prior to the effective date of the rate change

Setting up Recurring Rate Changes

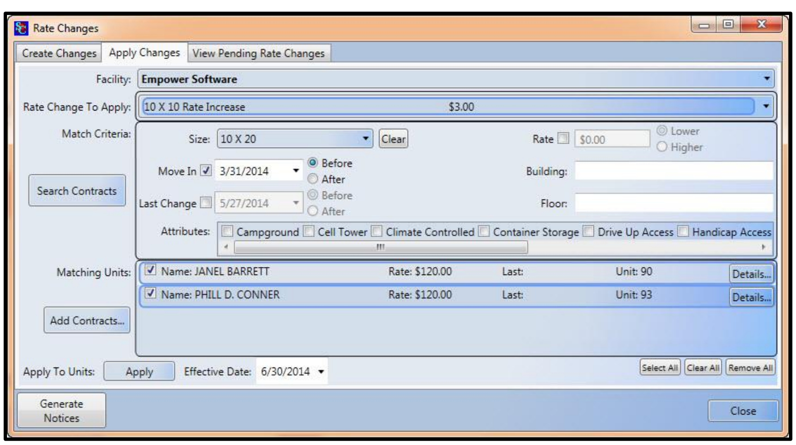
To configure a rate change to automatically apply to selected accounts at predetermined time intervals *(every 12 months),* select **Recurring** and enter the number of months before the rate change is to go into effect, into the **Start** field. Enter the time duration between auto rate changes into the Recurring Each Periods field. ***For example:*** *To create a recurring rate change that goes into effect 12 month after the move-in and reapplies itself every 12 months, enter the number 12 into the Start field and the number 12 into the Recurring Each Periods field.*

Saving the Rate Change

When you have completed setting up the rate change, click on the OK button to save the rate change.

Assigning Customers to a Rate Change

Once you have created the rate change you will need to assign the rate change to a customer/contract. Start by clicking on the **Apply Changes** tab to match customers up to a specific rate change, you must first select the rate change that was developed through the **Create Changes** function discussed previously. In the **Rate Changes to Apply** field click on the down arrow to open a list of available rate changes. Select one of the rate changes from the list. After a rate change has been selected the next step would be to setup the Match Criteria.



Match Criteria

The rate change feature allows you to use the computer to locate customers who are occupying a specific unit configuration

Size	Click on the down arrow in the Size field to open a list of all available ***unit sizes***.
Rate	Enter a base value into the ***Rate field*** to qualify the rate change to occur on rental rates above or below the value entered this field.
Move-In	Set the rate change to only apply to customers who moved in Before or After the date entered this field.
Last Change	This field limits the rate change to affect only customers whose last rate change was before or after the date indicated in this field.
Building	Enter a building ID to assign the rate change to units within a specified building.
Floor	Enter a floor ID to assign the rate change to units within a specified floor.
Attributes	Constrain the rate change to units supporting specific attributes

Select the facility to apply the rate change.

Select the rate change to apply.

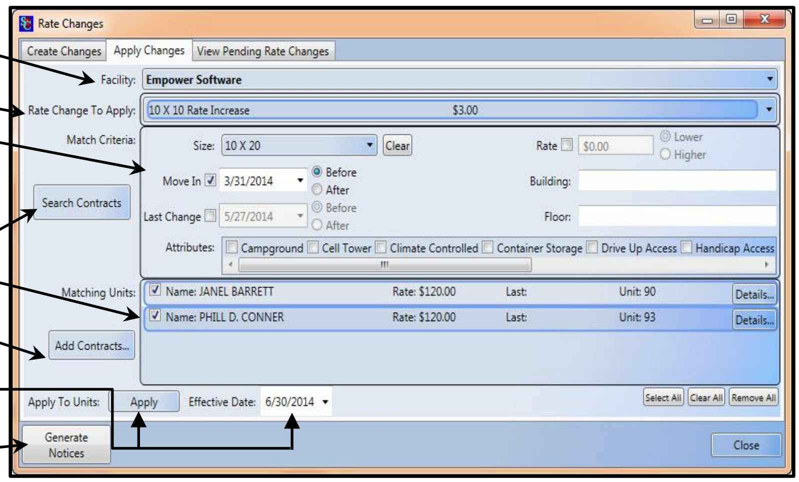
Locate specific customer profiles by selecting key search filters and clicking on the **Search Contracts** button.

A list of all Customers / Contracts that match the filter criteria will be displayed. Included in this list is the date of the last rate change for each customer in the list.

Add additional customers who did not meet the search criteria.

Set the rate change **Effective Date** and **Apply** the rate change.

Click on the **Generate Notices** button to print rate change notices to any customer who falls within the **Days Before** range that was set in the rate change setup.



After the **Match Criteria** has been entered, click on the **Search Contracts** to populate the **Matching Units** with the customers/contracts that fall within the rate change parameters

Manually Adding Customers to a Rate Change

Additional customers can be manually added to the rate change by clicking on the **Add Contracts** button to display a list of all customers. Select a customer from within this list. To select more than one customer at a time, hold the Ctrl down while clicking on customers in the list.

It is important to know that manually adding customers to the rate change allows you to add customers that do not fall within the parameters that were setup for this rate change.

Effective Date

Enter the implementation date for the rate change.

Apply to Units

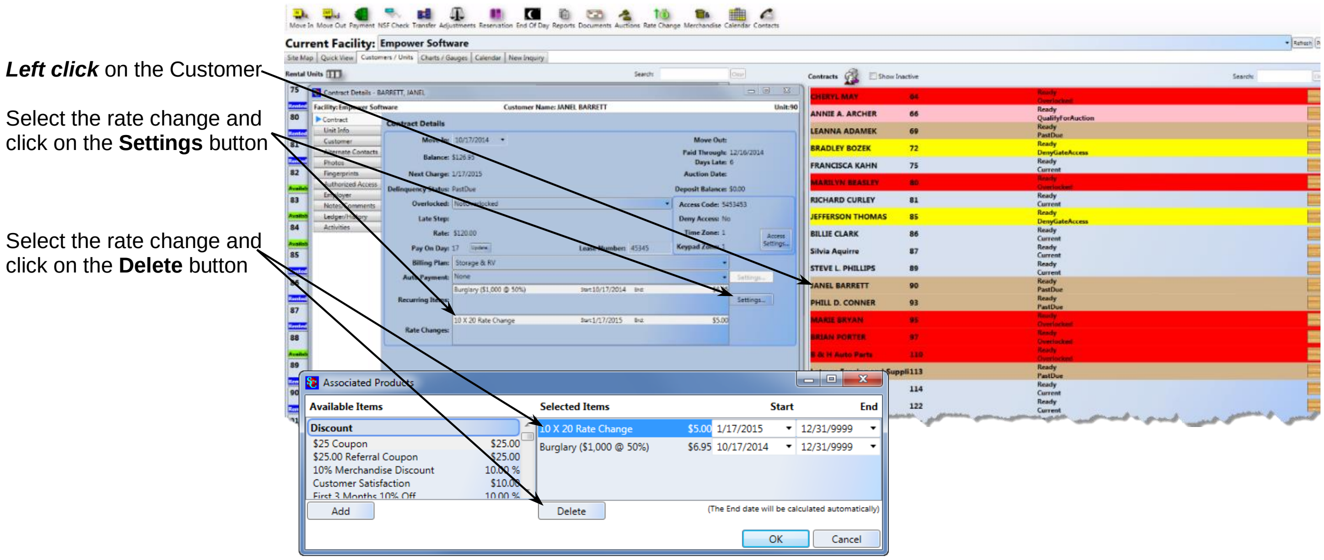
Click on the **Apply** button to apply and save the rate change. Viewing Rate Changes

All rate changes that have been setup can be viewed in the ***Pending Rate Change report***, or in the Calendar.

Removing Rate Changes

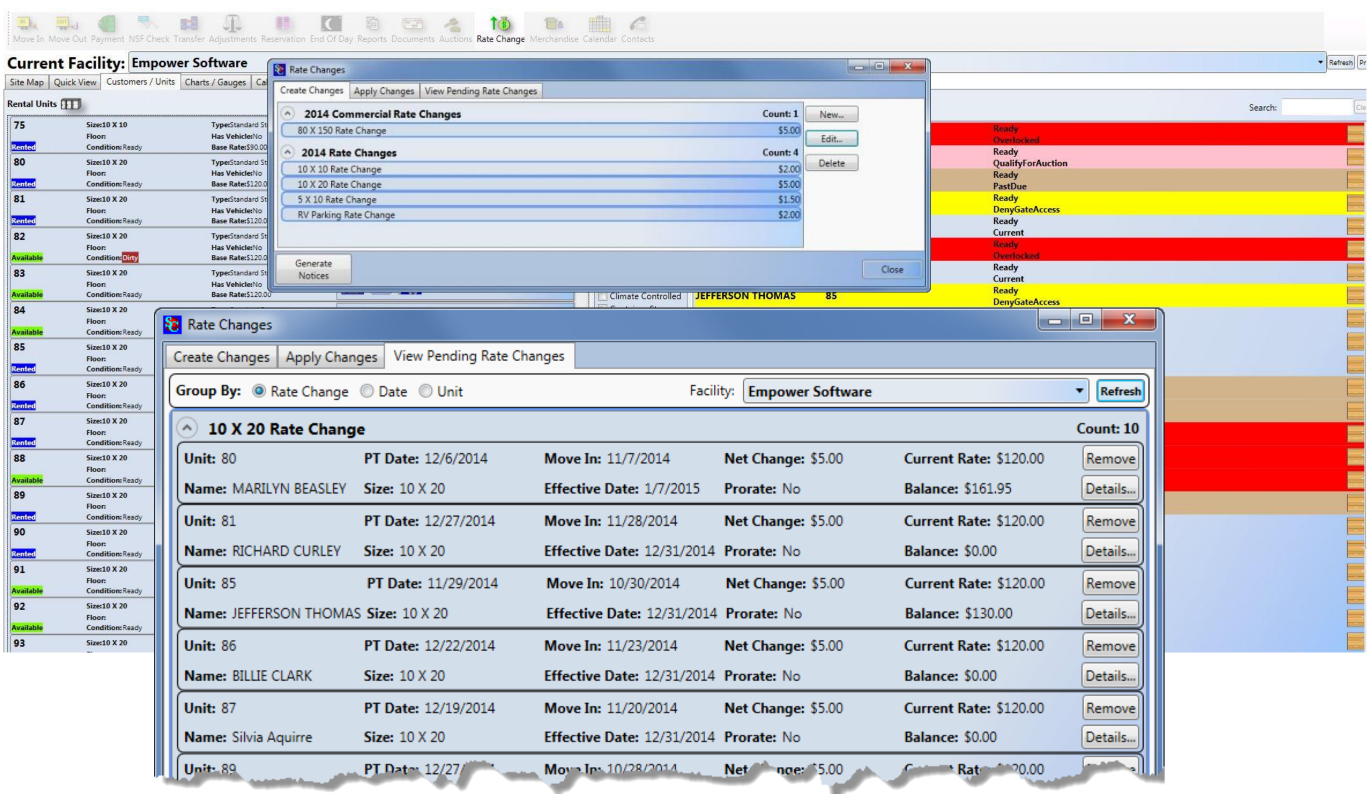
Rate changes that have been applied to a customer account can be removed by selecting the customer through the **Customers / Units** screen or by clicking on the **Rate Change** button on the tool bar, and selecting the **View Pending Rate Changes** tab.

Removing Rate Changes Through the Customers/Units screen

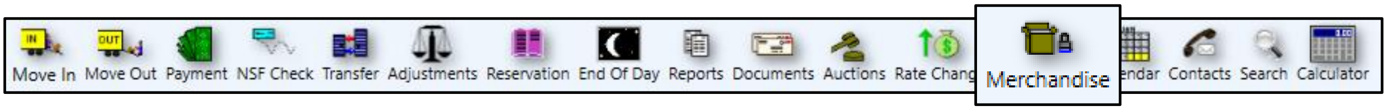


Removing Rate Changes Through the Tool Bar

Left click on the **Rate Change** button in the Tool Bar to open the Rate Change list box. Click on the **View Pending Rate Changes** to see a list of all scheduled rate changes. Locate the customer in the list and click on the **Remove** button.



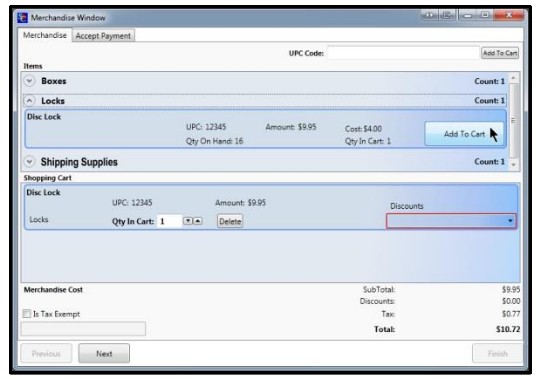
Merchandise



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

Selling Merchandise -Street Sales-

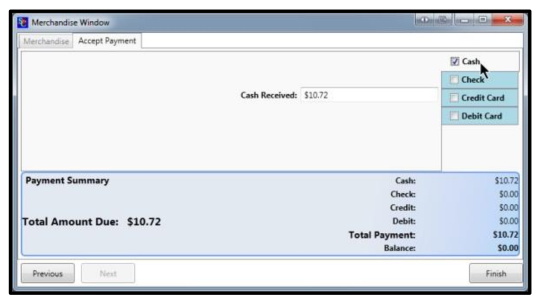
Click on the **Merchandise** button in the tool bar.



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

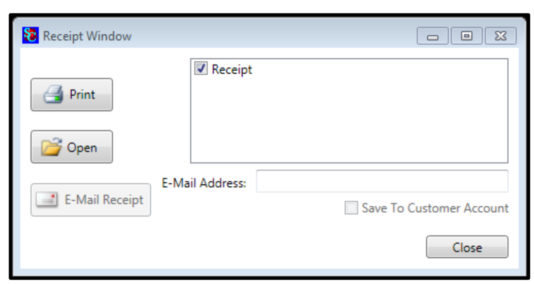
Note: *the quantity of an item can be increased or decreased by clicking on the up arrow (to increase) or down arrow (to decrease) located next to the* Qty In Cart *for the selected item.*

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



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

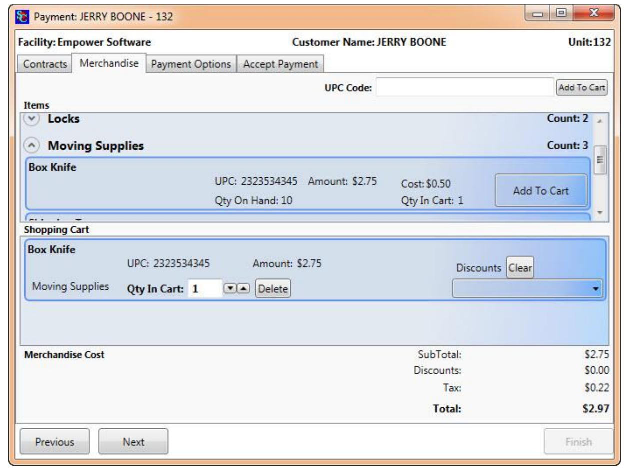
Click **Finish** to complete the transaction and proceed to the print receipt window.



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

Selling Merchandise –Through a Customer Account

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



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

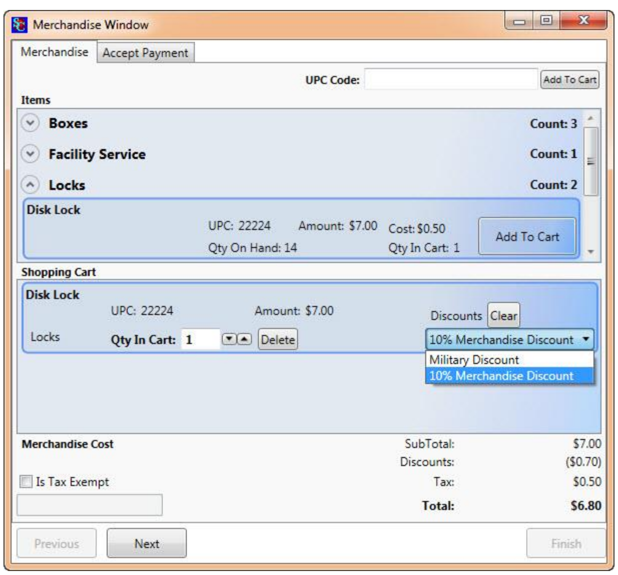
Selling merchandise through a customer account without charging rent

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

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

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

Adding a Discount to a Merchandise Sale



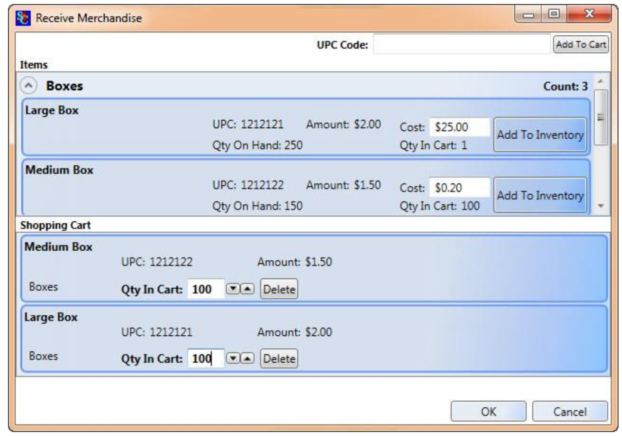
Once merchandise items have been added to the shopping cart, click on the **Discounts** pull down menu bar and select the appropriate discount item from the list. After a discount has been selected it will be added to the merchandise transaction and displayed in the **Merchandise Cost** section at the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

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

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

Receiving Merchandise

To receive inventory in 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.

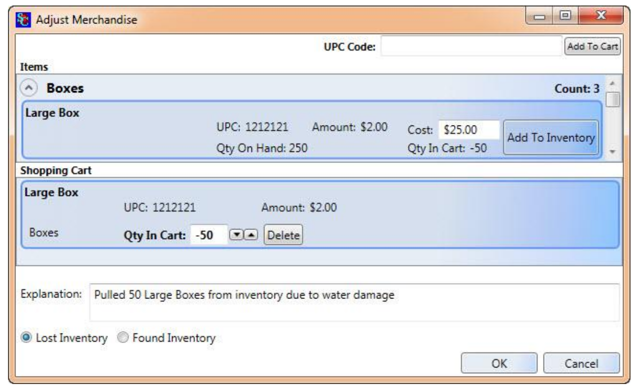


Adjusting Inventory

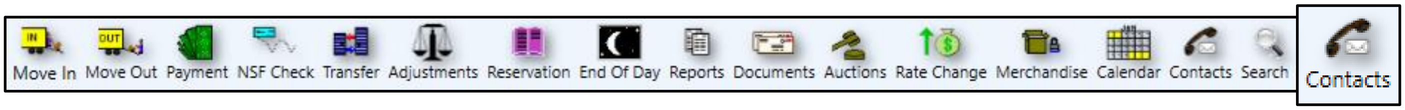
To adjust inventory levels, click on the **Activities** drop down menu located in the top task bar and select **Merchandise** / **Adjust Inventory**.

Select the merchandise item to be adjusted and click on the **Add to Inventory** button for that item.

In the **Qty In Cart** field inter the number needed for the adjustment. Entering a number to increase the inventory level and select **Found Inventory**, or enter a number proceeded with a minus sign (-) to decrease the inventory level and select **Lost Inventory**.
Enter an explanation in the **Explanation** field.

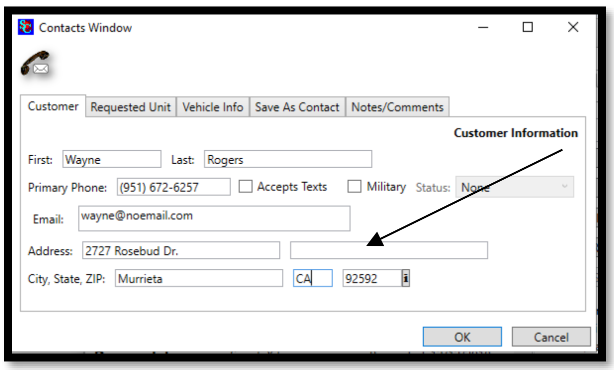


Creating a Contact



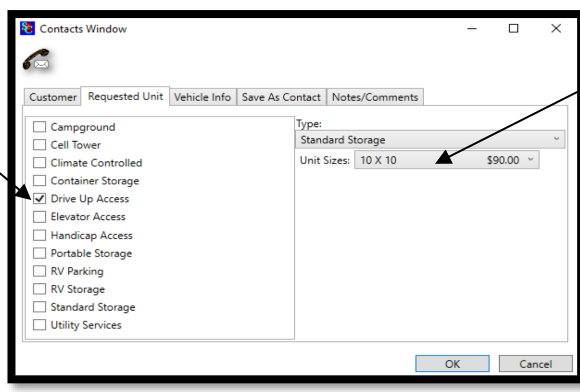
The Contacts feature allows Storage Commander to track potential customers who have contacted the facility and expressed an interest in renting a space. Through this feature you can enter the customers contact information as well as gather important information on how the customer found your facility and what their storage space needs are. Once this information is entered into the system you can refer to the Marketing and Contact reports to help guide you through more effective management of your facility.
To start this process, click on the **Contacts icon** in the tool bar. A contacts list box will open displaying a list of open contacts.

To add a new contact, click on the **New** button. Enter the customer information as represented on the screen.



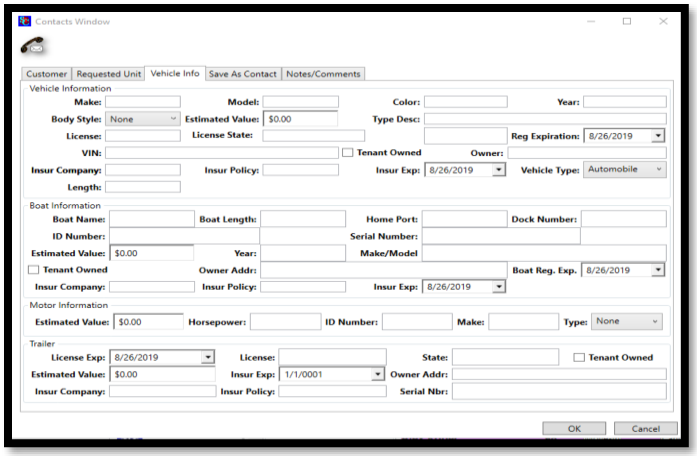
Proceed to the **Requested Unit** tab and select the type and size and features of the unit the customer is looking for.

Displays a list of features that are available at the facility. This list is created in the Configuration Manager under *Company Setup / Facilities / Facility Features*



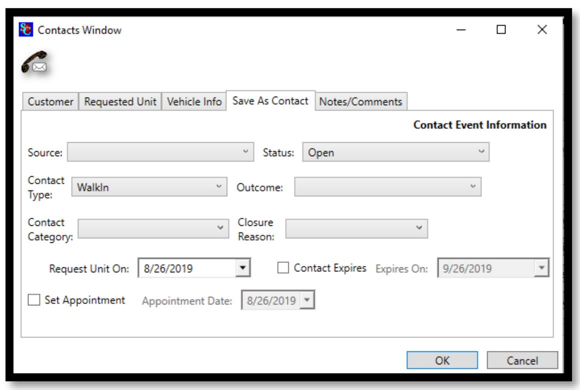
Click on the down arrow to open a list of Unit Types (such as standard storage units, RV parking, Portable Storage units etc.…).
Unit types are created in the Configurations Manager under *Company Setup / Rental Units / Unit List / Edit Unit Types*

The ***Vehicle Info*** screen allows you to record specific information concerning the Vehicle information. This screen collects information on a Vehicle, Boat or Trailer that will be held at your facility.

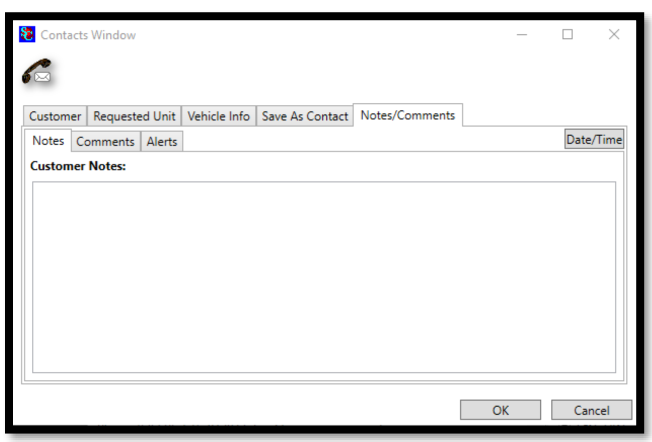


The ***Save As Contact*** screen allows you to record specific information concerning the storage selection of a potential customer as well as how the potential customer found out about your facility.

All the fields on this screen have a drop-down menu located on the right side of the field, click on the arrow to open the selection list box for the field. The selections contained in each field can be edited or new selections can be added through the Configuration Manager under Contact Data.



The ***Notes/ Comments*** screen allows you to record any other important information about the customer. This screen will allow you to **Date/Time** stamp the ***Note/Comment/Alert*** that are inputted.



Gate Software

Storage Commander offers integrations with gate access, security and equipment partners to help manage facility access. Whether you need a wired or wireless solution, keypads and/or a mobile app for your renters, Storage Commander partners have you covered.

The various gate software's that Storage Commander integrates with have security access control and security systems that provides a seamless integration. Storage facilities no longer need to work with two different systems which can take valuable time, lead to mistakes, unsatisfied customers and lost rent.

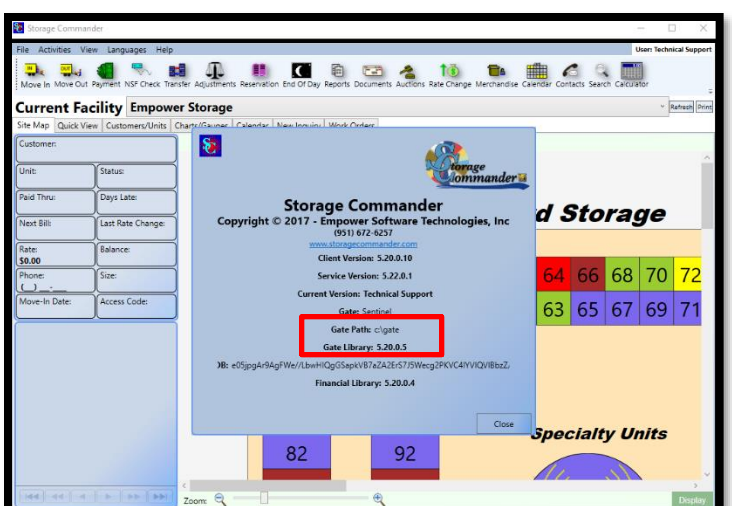
When you rent a unit in Storage Commander, the customer's information is automatically transferred to the gate software allowing the customer's individual access code to immediately operate your access control system. If a customer becomes delinquent, the information is communicated to the gate system to restrict the customer's access code. With the integration to Storage Commander Software, you can change customers individual access codes, select the specific time zone that the customer can access the facility and specify which keypads the customer can use.

Verifying the Gate in Storage Commander

During the initial setup and conversion process for Storage Commander our technical support team will setup Storage Commander to interface with your gate software. Within your gate software application, a change might be required to allow Storage Commander to communicate with the gate software. It is best to confirm with the gate manufacturer to ensure that their interface is setup properly to accept gate changes from Storage Commander. Our technical support team will let you know if a call or ticket is required to complete the gate interface.

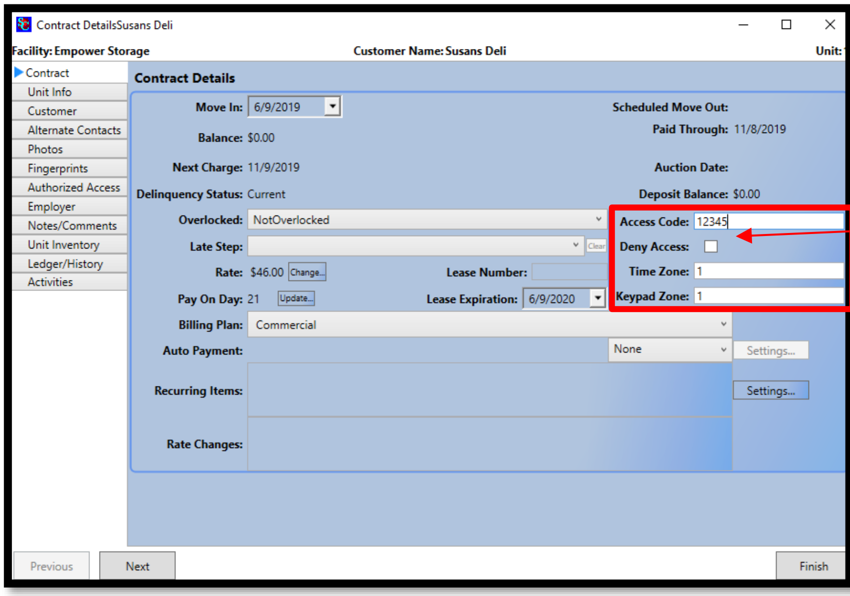
Storage Commander builds every gate integration based on a gate specification provided by the gate manufacturer. With that being said, depending on the gate software the setup process may be slightly different.

To verify that the Storage Commander Software is pointing to your gate system, select ***Help*** then ***About Storage Commander.*** If Storage Commander is pointing to your gate, the gate will have your selected gate manufacturer and the gate path will be filled out. The gate path is the location where all the gate updates are sent to the gate software. The gate path will be unique to the gate manufacturer. The gate software processes any gate changes that occur during move ins, move outs, payments, transfers and late events such as units denied access or unit overlocks / unit remove overlocks.



Testing the Gate in Storage Commander

To ensure that the gate interface is working properly, check by double clicking on a customer name in ***Quick View, Customer/Units or the Site Map*** windows will open the Contract Details window. This will open the **Contract Details** screen. The right side of the **Contract Details** screen will show gate access information. Follow the instructions below to update the unit access code or to deny access for testing.



Change the ***access code*** or select ***deny access*** and select **finish**, this will automatically update the gate software with the correct information.

To verify the change took place, open your ***gate software*** to see the updated unit information. You can also verify the gate by testing the change on the entry keypad of your gate system. Once you verify the change, please **toggle** back to ***Storage Commander*** to change the customer unit back to the correct access code or deny access.

Frequently Asked Questions

Use these frequently asked questions as a "Check List" if you suspect that your gates are not communicating with the Storage Commander Software. This table will explain which company needs to be contacts for further questions and/or a resolution.

Please visit our website at https://www.storagecommander.com/technology-partners/ for up-to-date contact information for your gate provider.

Issue	Troubleshoot	Contact for Further Questions/ Resolution
If updates are showing in Storage Commander but is not communicating to the gate system.	1. Check to see if the correct gate company and gate path located in the "About Storage Commander" tab. 2. Access to the location/ computer the gate path is pointed to. 3. The gate software folder should have "Read and Write" capabilities. (Please	**Storage Commander**

	check security settings on gate folders) 4. Anti-virus is not limiting access to software. 5. Network password protection turned off, and network discovery turned on (workstations only).	Technical Support: 951-301-1187 Support@storagecommander.com
If updates are showing in Storage Commander and in the gate software, but the gate is still not functioning.	1. Check to see if the customer is directed to the correct keypad. 2. Verify the time zone and keypad are correctly defined in the gate software and Storage Commander. 3. Check to see if the keypad is connected. 4. Verify the internet is connected and the modem/router has power.	**Gate Company** https://www.storagecommander.com/technology-partners/

Basic Gate System Troubleshooting

Use these steps if you suspect that your gates are not communicating with the Storage Commander Software. Follow the steps below in order. If you need assistance after you have tried these steps, please contact the **gate technical support team.**

1. Ask yourself the question, "What has changed at this facility that might have caused a problem with the gate?"

   Examples include:
   - Construction/electrical work on-site or in the area
   - Change made to system
   - New computer or hard drive
   - Power outages or surges (Blackouts or brownouts)
   - Lightning strikes
   - Bad weather

2. Ask yourself the questions,
   - "Was the gate system working before?"
   - "When did the problem first occur?"
   - "How did the problem first get noticed?"
   - "How often does the problem occur?"
   - "Does it tend to occur at specific times or in specific areas?"

3. Gate software can consist of several different programs that are loaded during the installation process. Some computers may require additional software or updates and will be loaded during the installation process by the gate access company. Be sure that the gate is open and connected to the computer and operational before beginning the troubleshooting process.

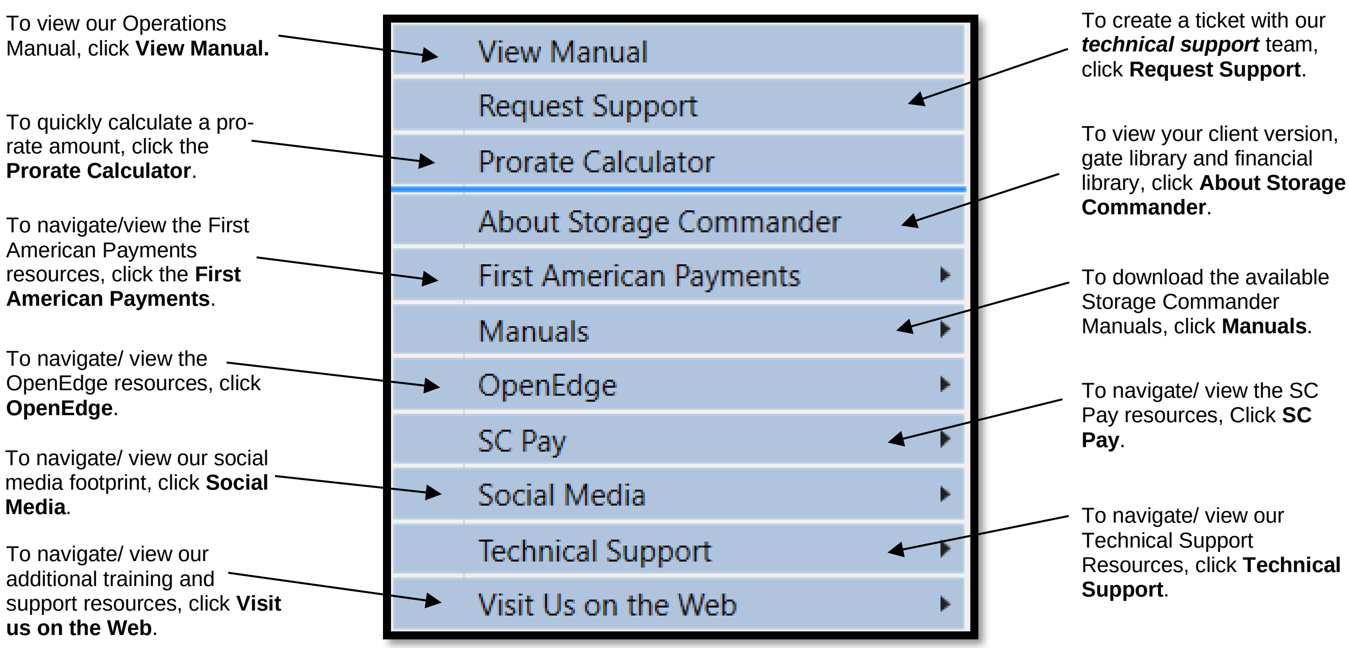
1. Many computer problems can be traced back to some basic issues: Make sure that the computer meets or exceeds the computer requirements for the selected gate software.
2. Be sure that all necessary Windows updates have been performed. Any new software is added to the computer can interfere with existing programs. Common problems include Cell phones, Video games, Cameras, USB Devices, Firewall software, and any program that controls ports on the computer.
3. Many viruses can cause problems with computer functionality. A good Anti-Virus software is recommended.
4. Check all power and data lines to the gate unit, computer, and each Keypad to make sure all items are connected tightly and correctly with no loose wires, shorts, crossed wires, exposed bare wires, or missing connections.
5. Verify that the ethernet cable is connected and that the connection is correctly made. Try switching with another ethernet cable or connection port.
6. Verify that the modem or router is connected and has power and is working.
7. Verify that the internet connection is up and running. In most cases, the connection must have a static IP and always be on. The internet connection must be high-speed.
8. Verify that the gate has been setup and is working on each computer on the network and that it is pointed to the correct computer name with the database on it.

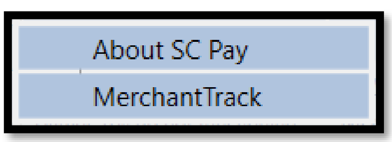
With any troubleshooting, some adjustment of the configuration may be required. This will differ with every setup depending on the computer, operating system, software, wiring, internet connection, modem connection, site specific issues and/or any other variable introduced into the setup. In no circumstances will Storage Commander Software, LLC be responsible for any damages either incidental or consequential based on these recommendations. These instructions are intended as a guide for basic gate system troubleshooting.

Help Tab

Storage Commander offers ***additional support and resources*** with the easy-to-use **Help Tab**. Whether you need to view our ***Operations Manuals, FAQ's, How- to Guides***, or just need to brush up on your software knowledge with the pre-recorded ***Orientation Class***, the Storage Commander **Help Tab** is your one stop shop.

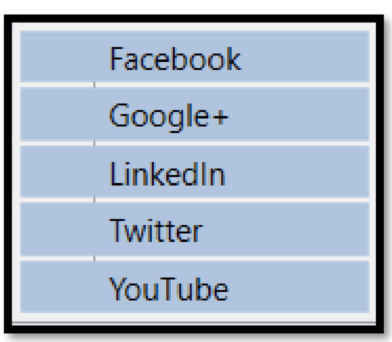
The various resources that are provided in the **Help Tab** allow you quickly jump to your ***Merchant Portal***, the ***Storage Commander Knowledgebase*** and even can create a ***technical support ticket***.





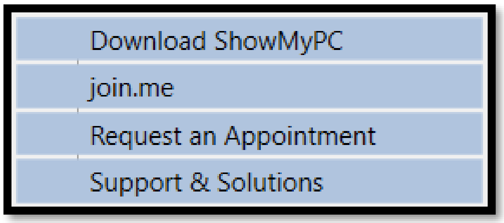
SC Pay

The SC Pay drop-down allows you to quickly navigate to our website for additional information on SC Pay. The MerchantTrack button will rediret you to your MerchantTrack (Merchant Portal).



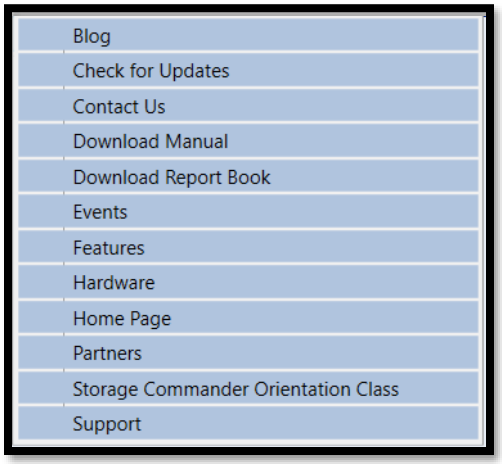
Social Media

To visit us on the web or to view our Social Media presence, click the corresponding website. When redirected to the website you can leave Storage Commander a review.



Technical Support

The technical support drop-down allows you to quickly navigate to our support and solutions page, request a technical support appointment and download the program for remote desktop.



Visit Us on the Web

The visit us on the Web drop-down has additional information and resources for Storage Commander. To quickly navigate to any of these, click the corresponding name.

The most used titles are:

- Check for Updates
- Download Manual
- Download Report Book
- Partners
- Storage Commander Orientation Class
- Support

Contacting Storage Commander

General Support Information

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

Technical Support for Storage Commander:

Technical Support: 951-301-1187

Fax: 877-600-8412

Digital Fax: 951-813-2548

Email: support@storagecommander.com

Website: www.storagecommander.com/support

Sales for Storage Commander:

Front Office: 951-672-6257

Toll Free: 877-672-6257

Fax: 951-600-8412

Digital Fax: 951-813-2548

Email: sales@storagecommander.com

Website: www.storagecommander.com

For additional information and resources please visit our website at: www.storagecommander.com/support