

STORAGE COMMANDER

Configuration Manager 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, and incorporates many features not found in any other management program.

This manual will help you to quickly get started in the Storage Commander Configuration Manager. We strongly recommend that you start with Section 1, *Facility Operations Setup*. This section will give you an overview of all company setup information, screens and parameters that affect the operations of Storage Commander.

Proceeding to Section 2 on, will allow you to familiarize yourself with basic setup for daily operations such as: User Options, Contract Items, Account information, Marketing data, and Miscellaneous items.

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

We're available to help you with any questions that you might have with using Storage Commander. Our software comes with 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,

Storage Commander Software, LLC
28999 Old Town Front Street, Suite 203
Temecula, CA 92595

Sales(877)-672-6257
Email.....sales@storagecommander.com

Technical Support..(951)-301-1187
Email.....support@storagecommander.com

Websitewww.storagecommander.com

History

Date	Doc version	Description	Author
11.19.2014	1.0	Created by	Thomas Smith
04.28.2020	2.0	Revision	Missy Battistoni
9.03.2021	3.0	Update	Missy Patel

Terms and Conditions of Agreement

These terms and conditions cannot be modified except in writing signed by an authorized Officer of Storage Commander Software, LLC. (Storage Commander)

WARRANTIES

A) Installation of this product implies full and complete acceptance of the software. Storage Commander Software agrees to correct software defects that cause the software to fail to conform to Storage Commander Software specifications, provided that the customer has notified Storage Commander Software of any such defects, and, upon inspection, Storage Commander Software has found the software to be non-conforming.

B) No warranty extended by Storage Commander Software shall apply to any product that has been modified or altered by a person other than Storage Commander Software authorized personnel. Nor will any warranties be extended to any product that becomes defective due to misuse neglect, or improper installation.

C) Storage Commander Software liability under warranty shall be limited solely to the costs of any necessary repairs to, replacement of, or refunds of the buyer's purchase price for hardware options that were purchased with the product, within (30) thirty days of the ship date of the product, and Storage Commander Software assumes no risk of, and shall not in any case be liable for any damages arising from the use of this product, breach of warranty or contract.

D) All products sold by Storage Commander Software hereunder shall be deemed acceptable by buyer unless buyer notifies Storage Commander in writing within fourteen days of delivery date that such products are damaged, defective, or cannot be made operational.

E) The express warranties set forth in this agreement are in lieu of all other warranties, express or implied, including, without limitation, any warranties of merchantability or fitness for particular purpose.

LIMITATION OF LIABILITY

Storage Commander Software's sole liability, if any, is limited to the replacement costs of the hardware options sold in this transaction. In no event shall Storage Commander be liable for any loss of use, revenue, profit or for any direct, indirect, or consequential damages arising out of, in connection with, or resulting from the use or sale of the products sold by Storage Commander Software, LLC.

ATTORNEY'S FEES

The parties stipulate and agree that in any action or proceeding brought to enforce this agreement, or any of its terms, the prevailing party in action or proceeding shall be entitled to reasonable attorney's fees and costs incurred in connection with the action or proceeding, in addition to all other relief to which the prevailing party may be entitled.

ARBITRATION

Any controversy or claim arising out of or relating to this agreement, or breach of this Agreement, shall be settled by arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction.

CONTROLLING LAW

The entire transaction contemplated hereunder shall be governed by the laws of the State of California without regard to its conflict-of-law rules.

ENTIRE AGREEMENT

The acknowledgement contains all the terms and conditions with respect to the sale and purchase of the products sold hereunder and there are no representations or warranties, express or implied, affecting this instrument that are not expressly set forth herein.

➤ License Agreement

SOFTWARE LICENSE

This is a legal agreement between you (either an individual or an entity) the end user, and Storage Commander Software, LLC. If you do not agree to the terms of this Agreement, promptly return the disk(s) and accompanying items (including all documentation) to Storage Commander Software, LLC.

GRANT OF LICENSE

This Storage Commander Software, LLC License Agreement ("License") permits you to use one copy of the software as specified in the invoice on a single computer at the site specified in the invoice. If you have multiple Licenses for the software, then at any time you may have as many copies of the SOFTWARE in use as you have Licenses. The SOFTWARE is "in use" on a computer when it is loaded into the temporary memory (i.e., RAM) or installed into the permanent memory (e.g., hard disk or any other storage device) of that computer.

COPYRIGHT

The SOFTWARE is owned by Storage Commander Software, LLC and is protected by United States copyright laws. Therefore, you must treat the SOFTWARE like any other copyrighted material (e.g., a book or musical recording).

Instructional materials accompanying the SOFTWARE may not be copied without prior written approval of Storage Commander Software, LLC.

OTHER RESTRICTIONS

This Storage Commander Software, LLC License Agreement is your proof of license to exercise the rights granted herein and must be retained by you.

Renting, leasing, reselling or redistribution of the SOFTWARE in any form, is expressly forbidden.

Table of Contents

COMPANY SETUP	1
Company Information	1
Editing Company Information	1
Adding a New Company Address	2
Adding a new Company Phone Number	2
FACILITY SETUP	3
Settings Button	3
Load Facility Map	5
Setting up Texting	6
TRACKING YOUR COMPETITION	7
FACILITY OPERATIONS SETUP	8
Establishing Occupancy & Insurance Goals	12
Insurance Contract / Addendum	13
Selecting an Insurance Provider	13
Selecting Payment Receipt	14
Selecting Declined Card Receipt	14
CREATING & EDITING UNITS	18
Creating A Unit Size	18
Creating New Units	19
Document Editor	20
Editing a Notice	21
Adding Merge Fields	21
Adding Transaction Tables	23
Deleting a Merge Field	23
Modifying Font Attributes in a Merge Field	23
Importing Word Documents	24
USER OPTIONS	25
User Management	25
Setting up a new user	25
Using the Excella Multi-purpose Scanner	26
Importing an Image	26
Adding a manager's fingerprint	26
Setting a Managers Security Level	27
Assigning Manager to a Facility(s)	27
Group Management	27
Creating a Security Profile	27
Adding Program Functions to a Security Profile	28
Removing Program Functions from a Security Profile	28
Editing an Existing Security Profile	28
CONTRACT ITEMS	29
Creating Tax Items	29
Removing a tax item from a facility	29
Assigning Tax	30
Assigning Tax to Rent	30
Creating Fees	31
Assigning Fees to a Facility	32
Assigning a Fee as Taxable	32
Editing A Fee	32
Deleting A Fee	32

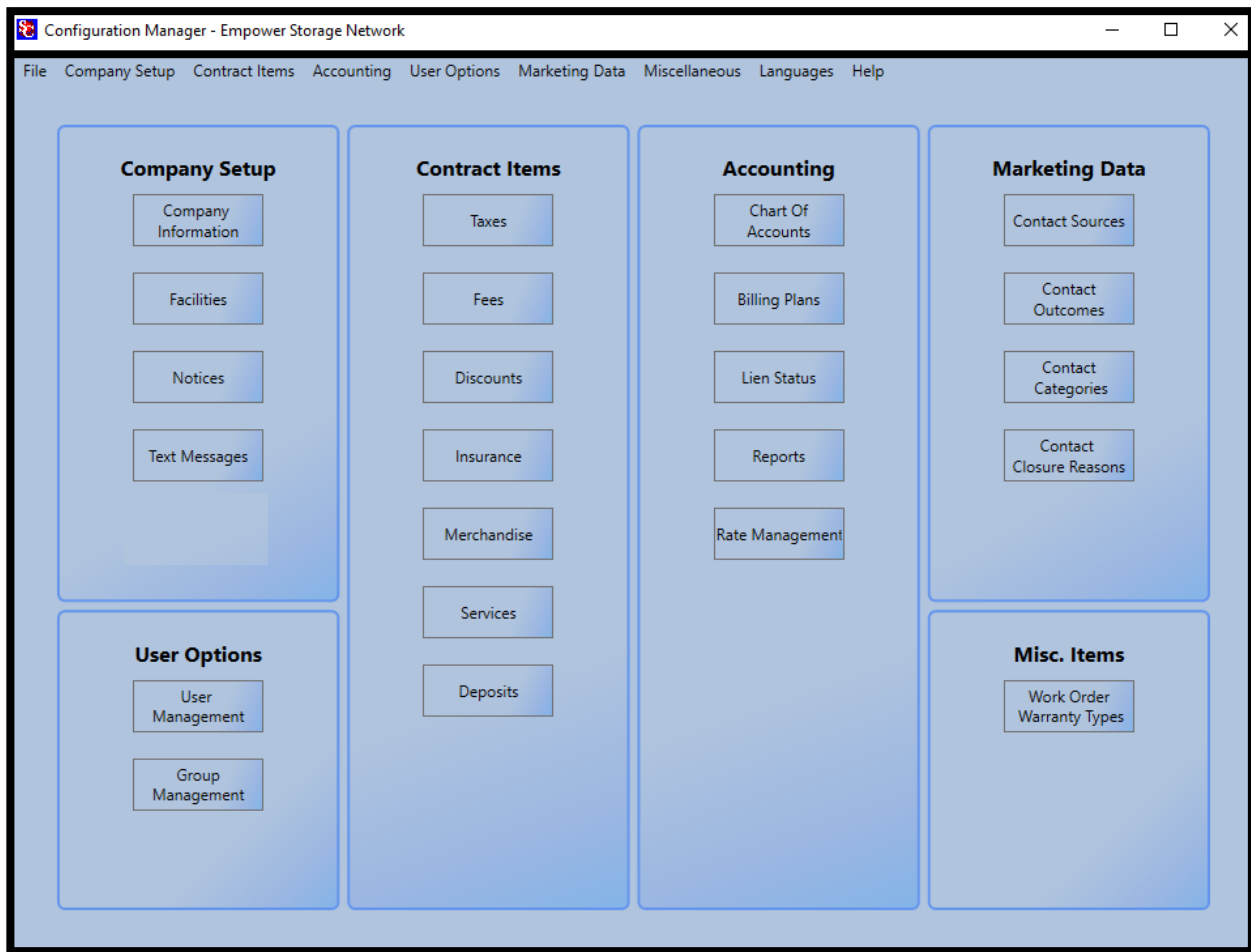
Creating Discount	33
Assigning Discounts To Facilities.....	34
Editing A Discount.....	34
Deleting A Discount	34
SETTING UP INSURANCE PROVIDERS	35
Setup/Edit new insurance policies.....	35
Adding a New Address.....	36
Adding a New Phone Number	36
Adding Insurance Policies to a Facility	37
Deleting a Insurance Policy	37
Setup Merchandise	38
Assigning Merchandises To A Facility	39
Editing A Merchandise Item.....	39
Deleting A Merchandise Item	39
Receiving Merchandise at the Facility	39
Setup Services	40
DEPOSITS ACCOUNTS	41
Creating A Deposit	41
Editing A Deposit.....	41
Deleting A Deposit	41
ACCOUNTING	42
Creating the Chart of Accounts	42
Editing the Chart of Accounts	42
Deleting an Account Class.....	42
BILLING PLANS	43
Creating a Billing Plan	43
Creating a Move-In Policy	43
Prorate Options	44
Move-In & Transfer Contracts	44
Selecting a Move-In or Transfer Contract.....	44
Automatically Apply.....	44
Setting Auto Invoicing	45
Setting the Billing Cycle.....	45
Move-Out	46
Creating a Move Out Policy	46
Setting Refund & Prorate Policies.....	46
Prorate Calculation	47
Move Out Report	47
Miscellaneous	48
ASSIGNING INCOME ACCOUNTS	49
Establishing Income and Prepaid Accounts	49
Assigning Billing Plans To A Facility.....	49
CREATING LATE GROUPS	50
Configuring a Late Step	50
Adding a Late Step	50
Options	51
Editing a Late Step	51
Deleting a Late Step	51
Assigning A Late Group to A Facility	52
REPORT GROUPS	53
Creating a Report Group.....	53

RATE MANAGEMENT.....	54
Rate Manager Trigger Points	54
Creating a Rate Management Item.....	54
MARKETING DATA	55
Contact Source.....	55
Assigning Contact Sources to a facility	55
Contact Outcomes	55
Contact Categories.....	56
Assigning Contact Categories to a facility	56
Contact Closure Reasons	57
Creating a New Contact Closure Reason	57
Assigning Contact Closure Reason to a facility	57
MISC. ITEMS.....	58
Creating a New Warranty Type.....	58
Deleting a Warranty Type	58

Configuration Manager

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

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



Company Setup

Company Information

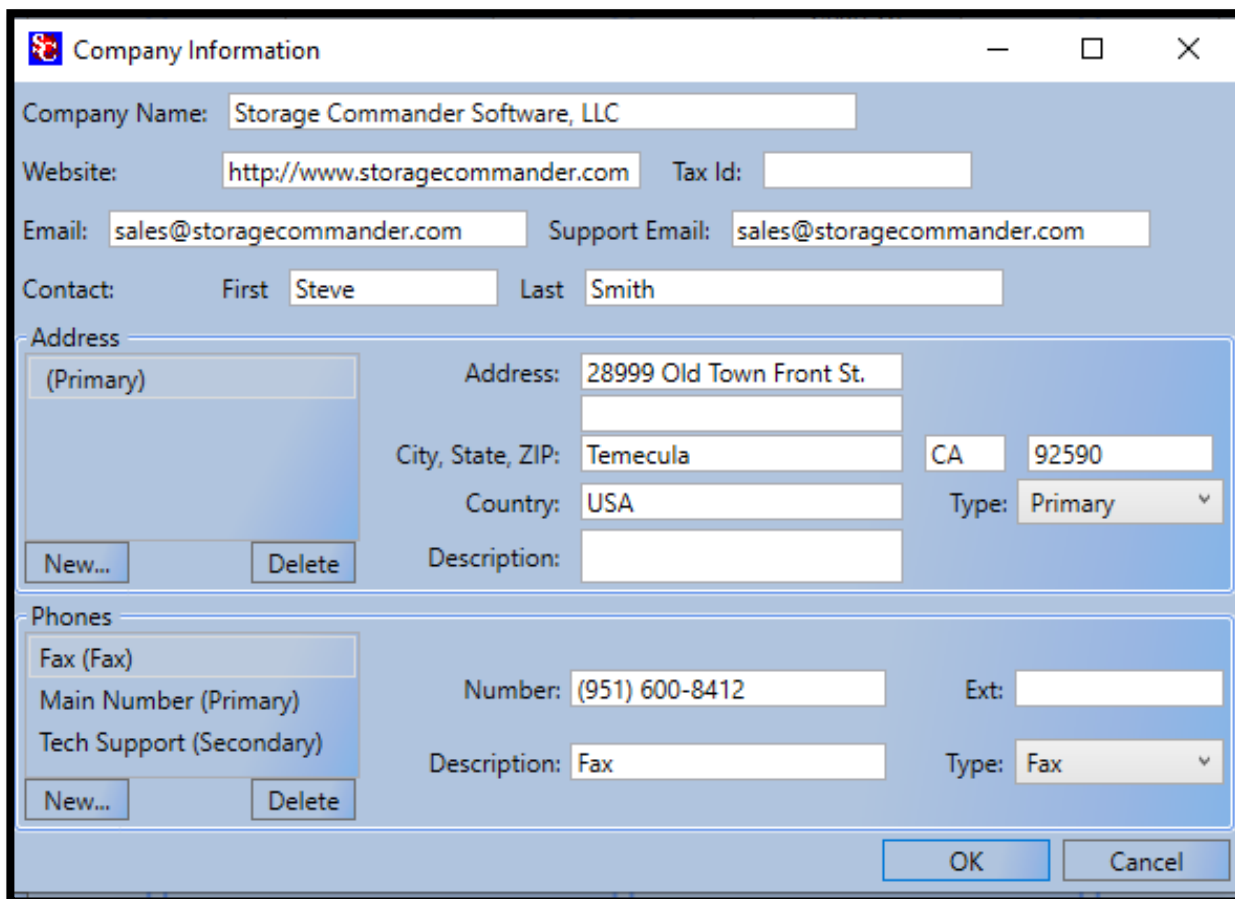


The company setup information screen is used to enter address and contact information for the head office location of multi-site operations (corporate headquarters). The **Company Information** screen differs from the **Facilities** Information screen in that the information entered in the Company Information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

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

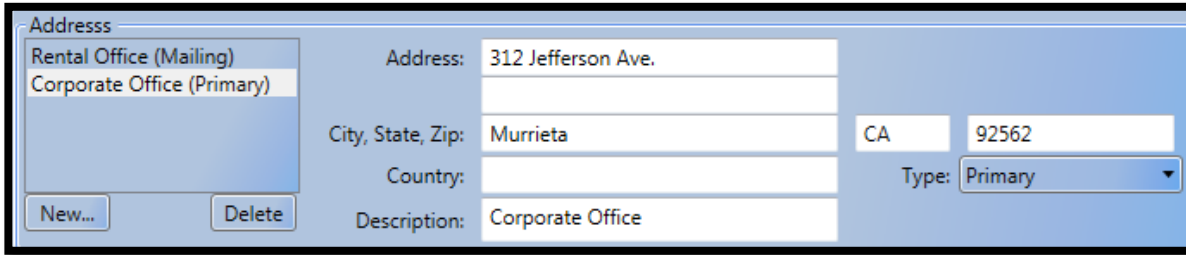
EDITING COMPANY INFORMATION

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

A screenshot of a software dialog box titled "Company Information". The dialog box contains several input fields and sections. The "Company Name" field is filled with "Storage Commander Software, LLC". The "Website" field is filled with "http://www.storagecommander.com". The "Tax Id" field is empty. The "Email" field is filled with "sales@storagecommander.com" and the "Support Email" field is also filled with "sales@storagecommander.com". The "Contact" section has "First" filled with "Steve" and "Last" filled with "Smith". The "Address" section has a "Primary" tab selected. The "Address" field is filled with "28999 Old Town Front St.". The "City, State, ZIP" section has "City" filled with "Temecula", "State" filled with "CA", and "ZIP" filled with "92590". The "Country" field is filled with "USA". The "Type" dropdown menu is set to "Primary". The "Description" field is empty. There are "New..." and "Delete" buttons at the bottom left of the address section. The "Phones" section has a "Main Number (Primary)" tab selected. The "Number" field is filled with "(951) 600-8412". The "Ext" field is empty. The "Description" field is filled with "Fax". The "Type" dropdown menu is set to "Fax". There are "New..." and "Delete" buttons at the bottom left of the phone section. At the bottom right of the dialog box, there are "OK" and "Cancel" buttons.

ADDING A NEW COMPANY ADDRESS

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

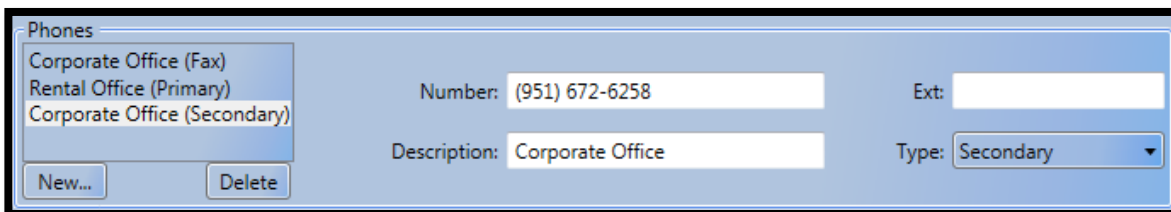


The screenshot shows a software interface for adding a new company address. On the left, there is a list box titled "Address" containing three items: "Rental Office (Mailing)", "Corporate Office (Primary)", and a blank space. Below the list box are two buttons: "New..." and "Delete". To the right of the list box, there are several input fields: "Address:" with the value "312 Jefferson Ave.", "City, State, Zip:" with "Murrieta", "CA", and "92562", "Country:" (empty), and "Description:" with "Corporate Office". On the far right, there is a "Type:" dropdown menu currently set to "Primary".

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

ADDING A NEW COMPANY PHONE NUMBER

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



The screenshot shows a software interface for adding a new company phone number. On the left, there is a list box titled "Phones" containing three items: "Corporate Office (Fax)", "Rental Office (Primary)", and "Corporate Office (Secondary)". Below the list box are two buttons: "New..." and "Delete". To the right of the list box, there are several input fields: "Number:" with the value "(951) 672-6258", "Ext:" (empty), "Description:" with "Corporate Office", and "Type:" dropdown menu currently set to "Secondary".

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

Facility Setup

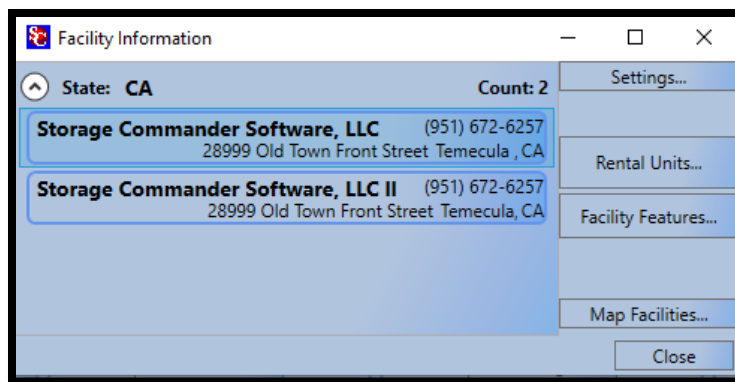


The Facilities section under Company Setup is where operating parameters, facility features, and unit configuration are created and/or edited.

Selecting the Facilities button in the Company Setup box will bring up the Facility Information screen. This screen will show all currently installed facilities with their contact information and address.

Settings Button

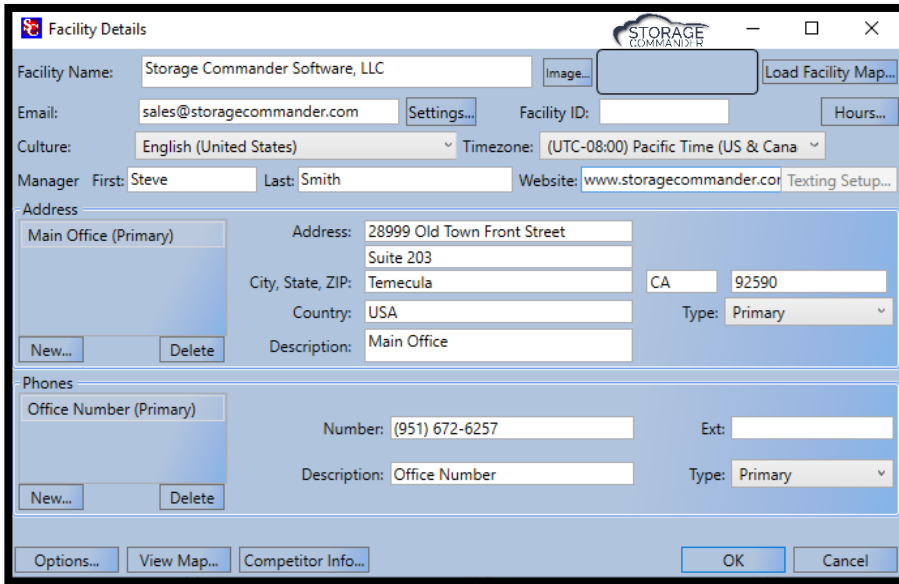
The Settings button opens the **Facility Details** window. From here you can edit the facilities address, phone, fax & email, facilities time zone (this feature is used by management companies who manage facilities across multiple time zones), select the format of how Currency, Dates & Numbers are displayed within the program by opening the Culture list box and selecting the associated country format for these values, enter the site managers name the can be used in receipts and other documents, and the facilities name, email, address and phone & fax numbers.



NOTE: Changing the facility name does not create a new facility, it merely changes the name of the facility that was selected, as well as the facility name used in all reports and notices. New facilities can only be added by contacting Storage Commander Software, LLC. and purchasing a new facility module.

Entering the Facilities Name & Address

Enter the name of the facility in the **Facility Name** field.



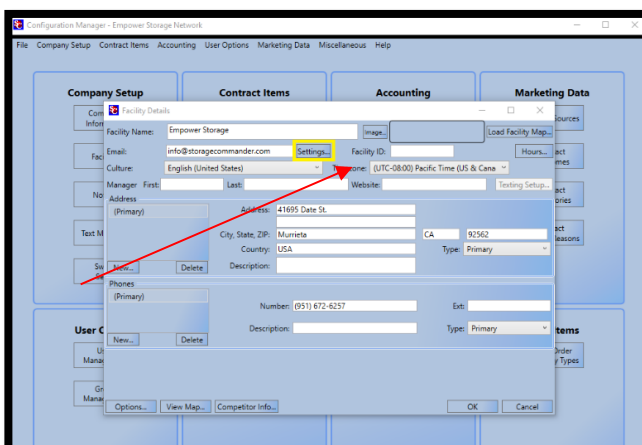
The screenshot shows the 'Facility Details' window. The 'Facility Name' field contains 'Storage Commander Software, LLC'. The 'Email' field contains 'sales@storagecommander.com'. The 'Culture' is set to 'English (United States)' and the 'Timezone' is '(UTC-08:00) Pacific Time (US & Cana)'. The 'Manager' fields show 'First: Steve' and 'Last: Smith'. The 'Website' is 'www.storagecommander.com'. The 'Address' section is expanded, showing 'Main Office (Primary)' with an address of '28999 Old Town Front Street, Suite 203, Temecula, CA 92590, USA'. The 'Type' is 'Primary' and the 'Description' is 'Main Office'. The 'Phones' section shows 'Office Number (Primary)' with the number '(951) 672-6257' and 'Type: Primary'.

In the **Address** section click on the **New** button and enter the address of the facility. In the **Type** field select the type of address being entered (such as: Primary, Mailing, or Other). An address designated as Primary will be used in **ALL** notices and documents. The **Description** field can be used to provide a short description of the address and will be displayed in the **Address** selection box.

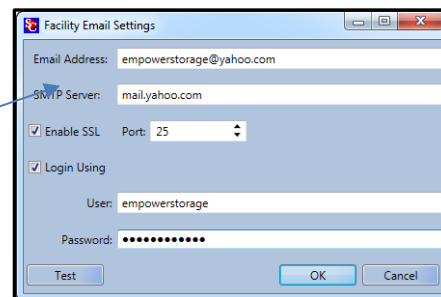
In the **Phones** section click on the **New** button and enter the phone number of the facility. In the Type field select the type of phone number being entered (such as: Primary, Secondary, Cell, Work, Home or Other). Phone Numbers designated as Primary will be used in all notices and documents. The **Description** field can be used to provide a short description of the phone number and will be displayed in the **Phones** selection box.

Setting up email

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



The screenshot shows the 'Configuration Manager - Empower Storage Network' window. The 'Facility Details' window is open, and a red arrow points to the 'Settings...' button next to the 'Email' field.



The screenshot shows the 'Facility Email Settings' window. The 'Email Address' is 'empowerstorage@yahoo.com'. The 'SMTP Server' is 'mail.yahoo.com'. The 'Enable SSL' checkbox is checked, and the 'Port' is '25'. The 'Login Using' checkbox is checked, and the 'User' is 'empowerstorage'. The 'Password' field is masked with dots. The 'Test' button is highlighted.

Fill in required fields based on your email providers requirements and click **Test** to verify the email function has been configured correctly. Please see the example above.

Configuring Date & Currency Format

To configure the format of the date and currency to conform to your local requirements, click on the down arrow next to the Culture field and select the country your facility is located in.

Configuring Facility Time Zone

To set the facility to the local time zone, click on the down arrow next to the Time zone field and select the time zone for the location of the facility.

Entering the Facility Managers Name

Entering the name of the facility manager will allow the managers name to appear on payment receipts or other documents. To include the manager's name in receipts and other documents a merge code for the manager's name must be included in the document. Refer to page 19 for information on how to insert a manager name into a document as a merge code.

Load Facility Map

Storage Commander has the capability to **Load Facility Map** once the map has been created by a Storage Commander Map Maker. This map is customized and created from facility blueprints/ pictures that are provided to the Map Maker.

Note: If you are interested in purchasing a Facility Map, please contact your **Account Manager**.

The screenshot shows the 'Facility Details' window with the following data:

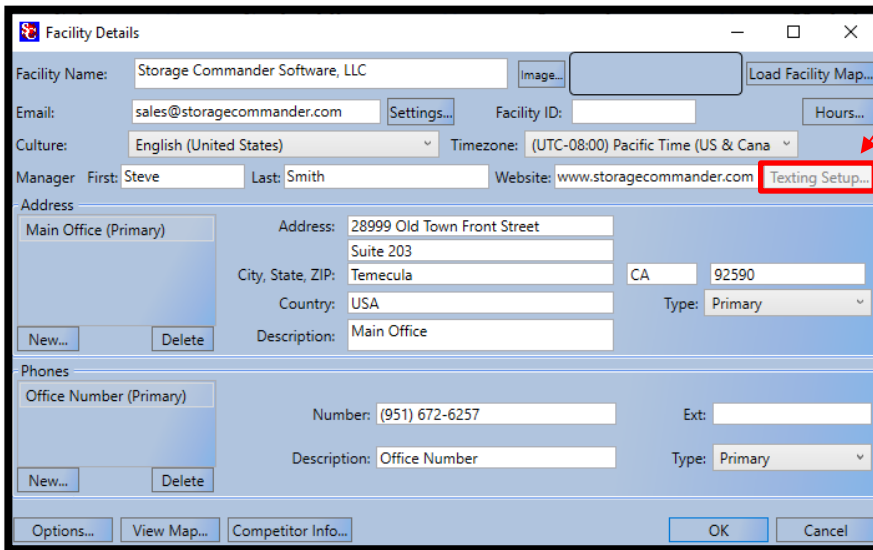
- Facility Name: Storage Commander Software, LLC
- Email: sales@storagecommander.com
- Culture: English (United States)
- Timezone: (UTC-08:00) Pacific Time (US & Cana)
- Manager First: Steve, Last: Smith
- Website: www.storagecommander.com
- Address: 28999 Old Town Front Street, Suite 203, Temecula, CA 92590, USA
- Type: Primary
- Description: Main Office
- Phone Number: (951) 672-6257
- Type: Primary
- Description: Office Number

Note: If you need to add to your current facility map or have edits, please contact the Storage Commander Technical Support team.

Setting up 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.

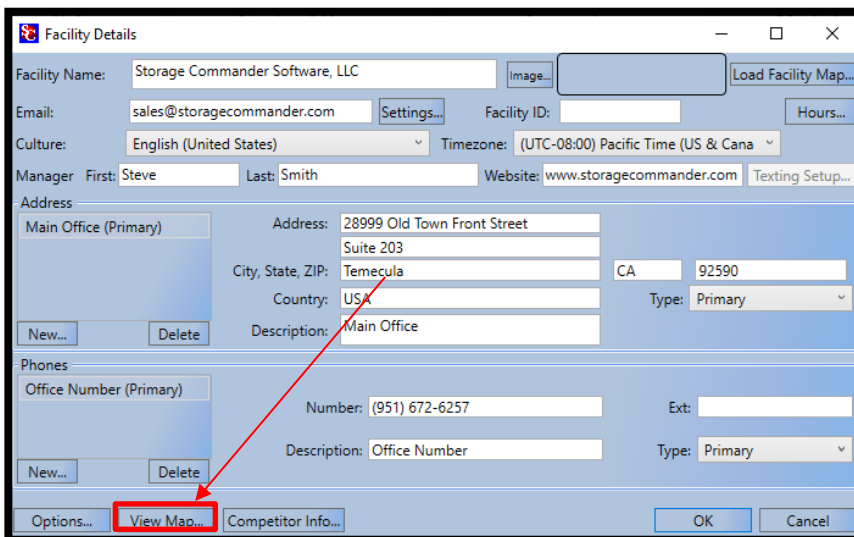
Once you have decided to send text messages out through Storage Commander, you will need to contact your choice partner for text messaging for setup. When a phone number is assigned to your facility you will need to provide those credentials to your Storage Commander Account Manager. Text messaging will be enabled on the back end. If you need to verify the credentials or change them for any reason, please click on **Texting Setup**.



Note: 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. Please see the Storage Commander Manual for further instruction.

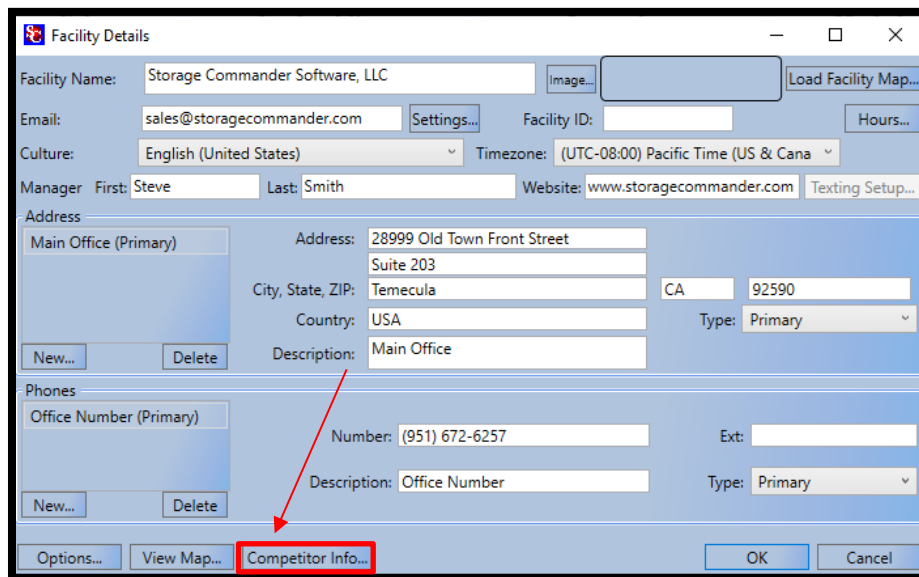
Viewing Map

Storage Commander will link your address to Google Maps. To view your location on the map, please utilize the "View Map" button on the bottom left of the **Facility Details**.

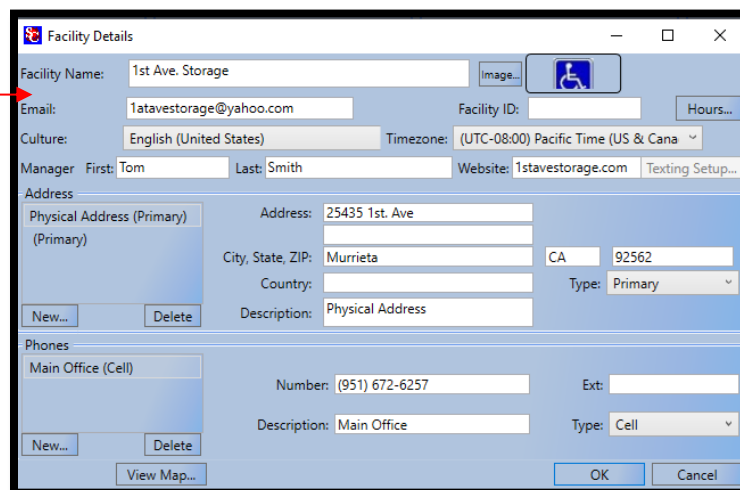


Tracking Your Competition

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



The screenshot shows the 'Facility Details' window for 'Storage Commander Software, LLC'. The window contains several sections: 'Facility Name', 'Email', 'Culture', 'Manager', 'Address', and 'Phones'. The 'Address' section is expanded to show 'Main Office (Primary)' with fields for Address, City, State, ZIP, Country, and Type. The 'Phones' section is also expanded to show 'Office Number (Primary)' with fields for Number, Ext, and Type. At the bottom of the window, the 'Competitor Info...' button is highlighted with a red box. A red arrow points from this button to the 'Facility Details' window in the second screenshot.



The screenshot shows the 'Facility Details' window for '1st Ave. Storage'. The window contains several sections: 'Facility Name', 'Email', 'Culture', 'Manager', 'Address', and 'Phones'. The 'Address' section is expanded to show 'Physical Address (Primary)' with fields for Address, City, State, ZIP, Country, and Type. The 'Phones' section is also expanded to show 'Main Office (Cell)' with fields for Number, Ext, and Type. At the bottom of the window, the 'View Map...' button is highlighted with a red box. A red arrow points from this button to the 'Facility Details' window in the first screenshot.

Note: Please note that clicking "OK" will save all changes. Please be sure to click "OK" before moving on.

Facility Operations Setup

On the Configuration Manager main screen **click** on the **Facilities** Icon, this will open the **Facilities Information** window. Locate and double click on the facility from the facilities list. From the **Facilities Details** window locate and click on the **Options** button located at the lower left side of the window.

Most of the facilities operation policies are assigned from this section. All operation items selected will be attached to the facility that was selected in the **Facilities Information** window.

The screenshot shows the 'Facility Options' window for the facility 'API Testing Internal'. The 'Default Billing Plan' is set to '1st Of Month w/ Inv'. A red arrow points to the dropdown arrow of the 'Default Billing Plan' field. Other settings include 'Default Reservation Plan' (1st Of Month), 'Default Online Billing Plan' (Commercial), 'Default Online Reservation Plan' (Military), 'Credit Card Processor' (StorageCommanderPay), 'Accepted Payment Options' (Cash, Check, Credit Card, Debit Card), 'Banking Account Number' (123456789), 'Prorate Method' (Yearly365), 'Occupancy Goal' (90), 'Insurance Contract' (Insurance Addendum), 'Insurance Goal' (95), 'Insurance Provider' (Ponderosa SafeStor), 'Payment Receipt' (Receipt), 'Reservation Confirmation' (Reservation Receipt), 'Transfer Receipt' (Transfer Receipt), 'Declined Card Receipt' (Declined Credit Card Receipt), and 'NSF Notice' (Returned Check Notice). There are also sections for 'Facility Options', 'No Print Days', 'Blue Moon Contract Interface', 'Rounding', 'Gate Access Codes', 'Insurance', 'Move Out Options', 'Additional Logins', and 'Default Settings'.

Selecting Default Move-In Billing Plan

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

Setting up Default Online Billing Plan

With this option you can select a Default Online Billing Plan that will automatically be assigned to new move-ins that are processed online.

This allows you to pre-assign unique billing plans for your customers who move-in online.

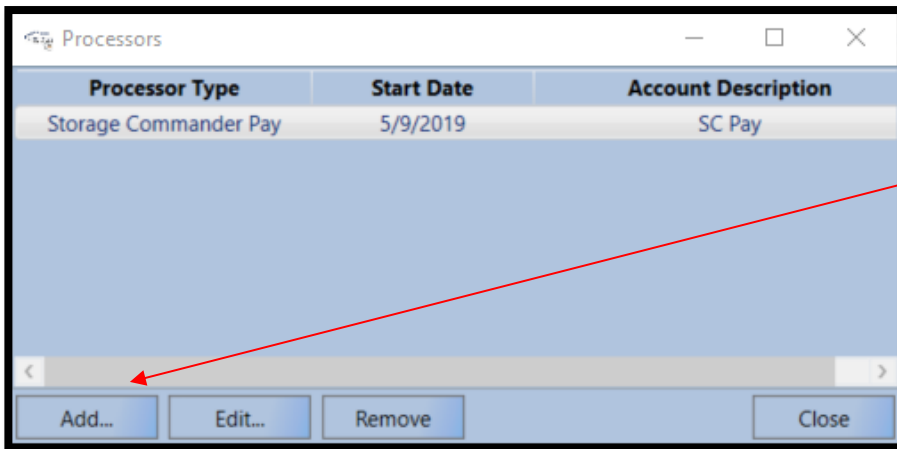
Setting a Reservation Billing Plan

With this option you can select a Default Reservation (billing) Plan that will automatically be assigned to new reservations that is different than your normal move-in billing plan. This allows you to pre-assign unique billing plans for your customers who reserve a unit first.

Credit Card Processor (Setup)

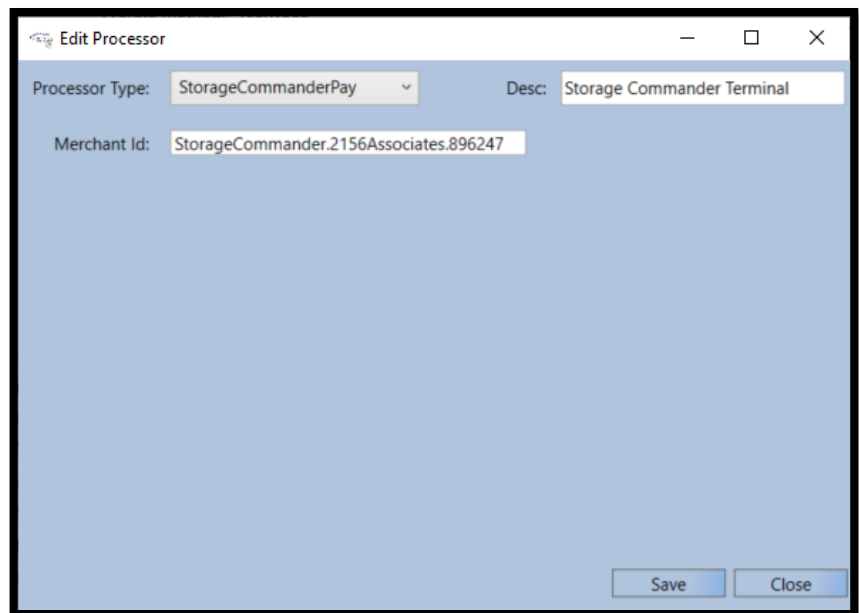
To setup a credit/ debit card processor the merchant ID is required. Select your **processor** from the drop down and Click **Settings**. To add your processor information Click **Add**. This will open the “**Edit Processor**” window. Select your processor from the **Processor Type** drop down and name the terminal in the **Desc.** Box (example: Storage Commander Terminal 1). Enter the **Merchant Id** as it is required for terminal use. Click Save. This will point Storage Commander to your Merchant.

Note: If you do not have a merchant provider and are interested in an integrated payment system, please contact your Storage Commander Account Manager.



To enter a new credit card processor, click on Add.

The Merchant Id is provided by the processor to allow facilities to process credit cards/ debit cards through Storage Commander.

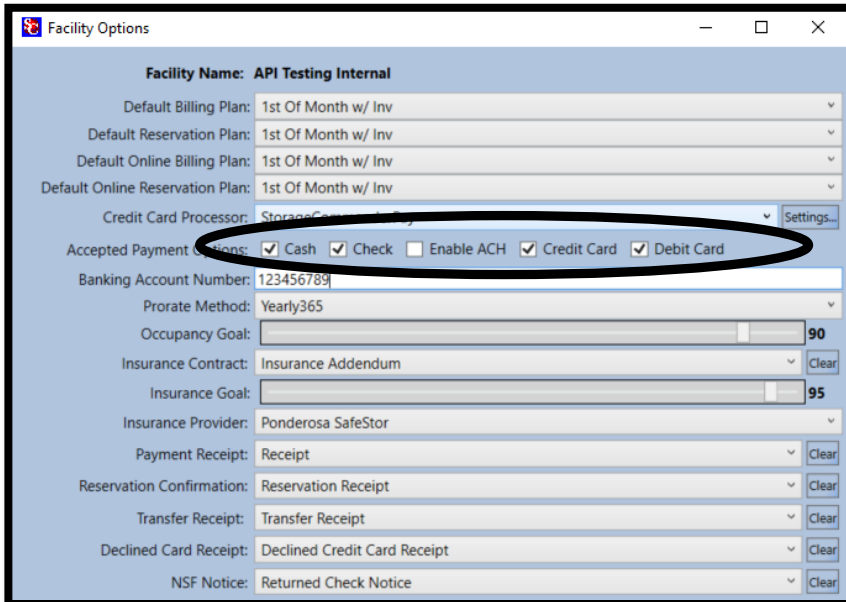


Special Note:

- Processor Settings can only be modified by managers who have Advanced Administrator privileges.
- Credit & Debit card transactions will use the same Merchant Id.

Accepted Payment Options

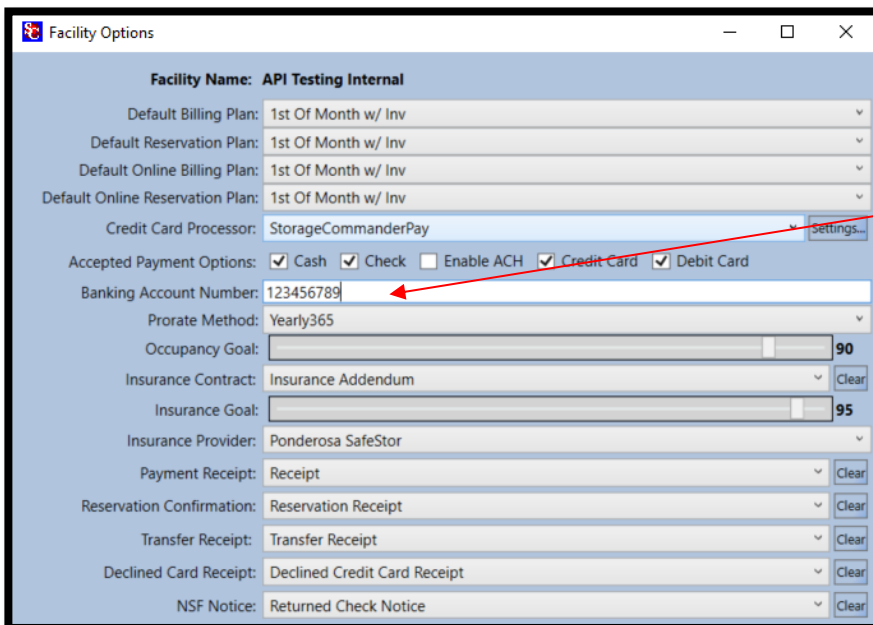
Storage Commander can be configured to allow only certain payment types (cash, check, credit...) for payment. To setup payment types, click on the box corresponding to the payment type you will allow at this facility.



The screenshot shows the 'Facility Options' window for 'API Testing Internal'. The 'Accepted Payment Options' section is circled in black, showing the following settings: Cash, Check, Enable ACH, Credit Card, and Debit Card. Other fields include Default Billing Plan, Default Reservation Plan, Default Online Billing Plan, Default Online Reservation Plan, Credit Card Processor (Storage CommanderPay), Banking Account Number (123456789), Prorate Method (Yearly365), Occupancy Goal (90), Insurance Contract (Insurance Addendum), Insurance Goal (95), Insurance Provider (Ponderosa SafeStor), Payment Receipt (Receipt), Reservation Confirmation (Reservation Receipt), Transfer Receipt (Transfer Receipt), Declined Card Receipt (Declined Credit Card Receipt), and NSF Notice (Returned Check Notice).

Banking Account Number (ACH)

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



The screenshot shows the 'Facility Options' window for 'API Testing Internal'. The 'Banking Account Number' field is highlighted with a red arrow, showing the value '123456789'. The 'Accepted Payment Options' section is also visible, showing the same settings as in the previous screenshot. Other fields include Default Billing Plan, Default Reservation Plan, Default Online Billing Plan, Default Online Reservation Plan, Credit Card Processor (StorageCommanderPay), Prorate Method (Yearly365), Occupancy Goal (90), Insurance Contract (Insurance Addendum), Insurance Goal (95), Insurance Provider (Ponderosa SafeStor), Payment Receipt (Receipt), Reservation Confirmation (Reservation Receipt), Transfer Receipt (Transfer Receipt), Declined Card Receipt (Declined Credit Card Receipt), and NSF Notice (Returned Check Notice).

Note: For pricing and ACH availability through your processor, please reach out to your Storage Commander Account Manager for verification.

Prorate Setup

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

Facility Options

Facility Name: API Testing Internal

Default Billing Plan: 1st Of Month w/ Inv

Default Reservation Plan: 1st Of Month w/ Inv

Default Online Billing Plan: 1st Of Month w/ Inv

Default Online Reservation Plan: 1st Of Month w/ Inv

Credit Card Processor: StorageCommanderPay

Accepted Payment Options: Cash Check Enable ACH Credit Card Debit Card

Banking Account Number: 123456789

Prorate Method: Yearly365

Occupancy Goal: MonthlyActual
Monthly30

Insurance Contract: Yearly365

Insurance Goal: 95

Insurance Provider: Ponderosa SafeStor

Payment Receipt: Receipt

Reservation Confirmation: Reservation Receipt

Transfer Receipt: Transfer Receipt

Declined Card Receipt: Declined Credit Card Receipt

NSF Notice: Returned Check Notice

The prorate options used in Storage Commander are:

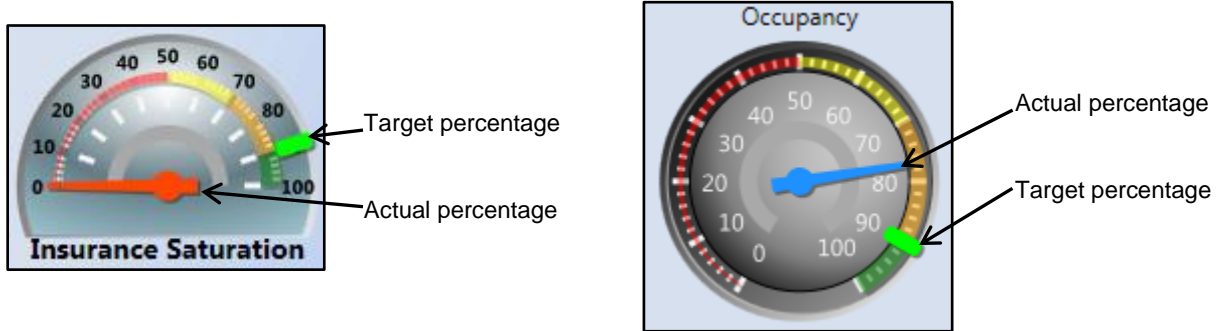
Yearly-365: Calculates prorate based on a 365-day year
(Formula: $\text{Rate} \times 12 \div 365 = \text{daily rate}$)

Monthly-Actual: Calculates prorate based on the actual number of days in the current month.
(Formula: $\text{Rate} \div \text{number of days in month} = \text{daily rate}$)

Monthly-30: Calculates prorate based on a constant 30-day cycle
(Formula: $\text{Rate} \div 30 = \text{daily rate}$)

ESTABLISHING OCCUPANCY & INSURANCE GOALS

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



The Occupancy and Insurance goals can be set by moving the slider from right to left until the appropriate revenue source is selected.

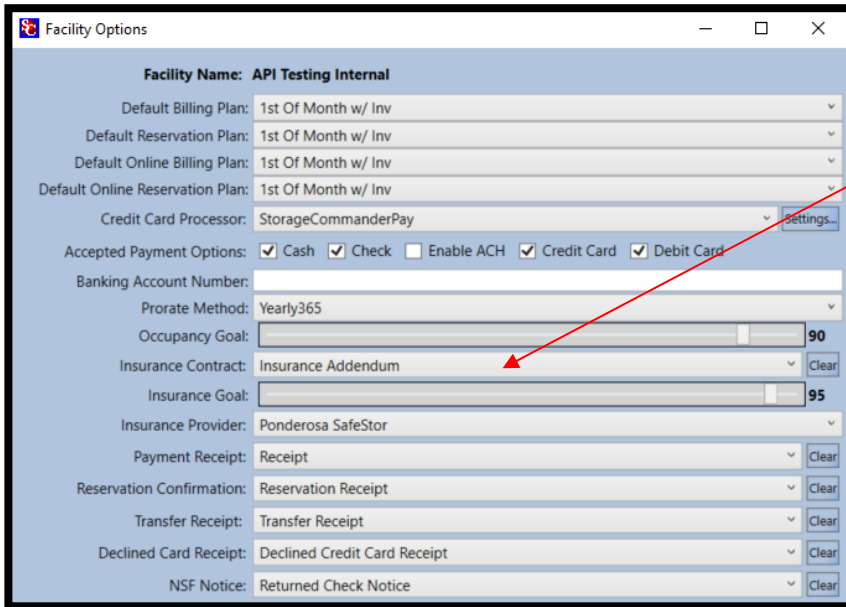
The screenshot shows a window titled "Facility Options" for "API Testing Internal". It contains several settings:

- Default Billing Plan: 1st Of Month w/ Inv
- Default Reservation Plan: 1st Of Month w/ Inv
- Default Online Billing Plan: 1st Of Month w/ Inv
- Default Online Reservation Plan: 1st Of Month w/ Inv
- Credit Card Processor: StorageCommanderPay
- Accepted Payment Options: Cash, Check, Enable ACH, Credit Card, Debit Card
- Banking Account Number: 123456789
- Prorate Method: Yearly365
- Occupancy Goal: 90 (highlighted with a yellow box)
- Insurance Contract: Insurance Addendum
- Insurance Goal: 95 (highlighted with a yellow box)
- Insurance Provider: Ponderosa SafeStor
- Payment Receipt: Receipt
- Reservation Confirmation: Reservation Receipt
- Transfer Receipt: Transfer Receipt
- Declined Card Receipt: Declined Credit Card Receipt
- NSF Notice: Returned Check Notice

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

INSURANCE CONTRACT / ADDENDUM

The Insurance Addendum provides you with a document that tenants sign indicating:



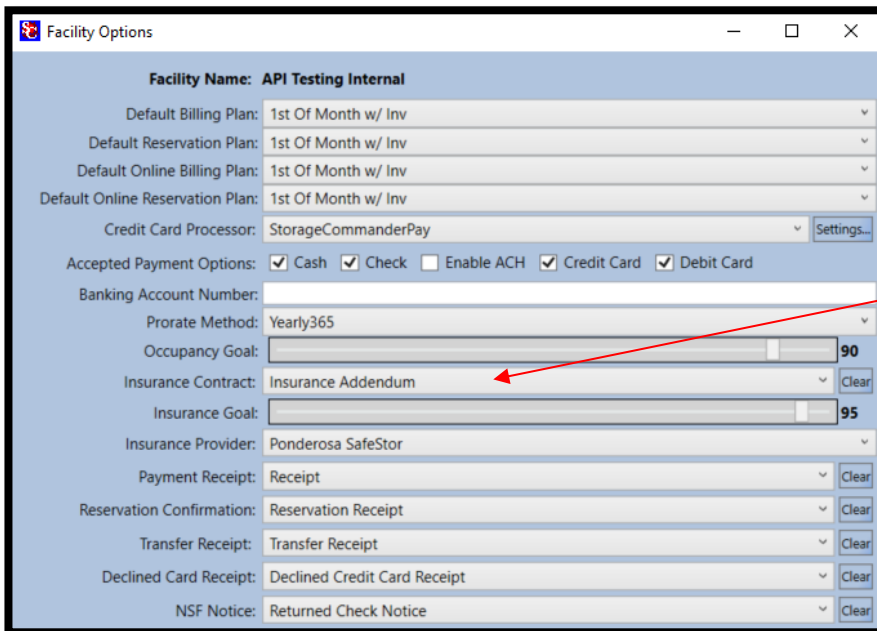
The screenshot shows the 'Facility Options' window for 'API Testing Internal'. The 'Insurance Contract' field is set to 'Insurance Addendum' and has a red arrow pointing to its dropdown arrow. Other fields include 'Insurance Goal' at 95, 'Insurance Provider' as 'Ponderosa SafeStor', and various receipt types.

- (1) The total amount of insurance coverage they have elected to purchase for the property that they will be storing.
- (2) If they have elected to use their homeowner's insurance.
- (3) have elected to not provide insurance coverage for their property.

Addendum", once selected this will be the document that is printed (if you have purchased the Customer Access Terminal, this document will be displayed on the terminal and can be filled in by the customer through this device).

SELECTING AN INSURANCE PROVIDER

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



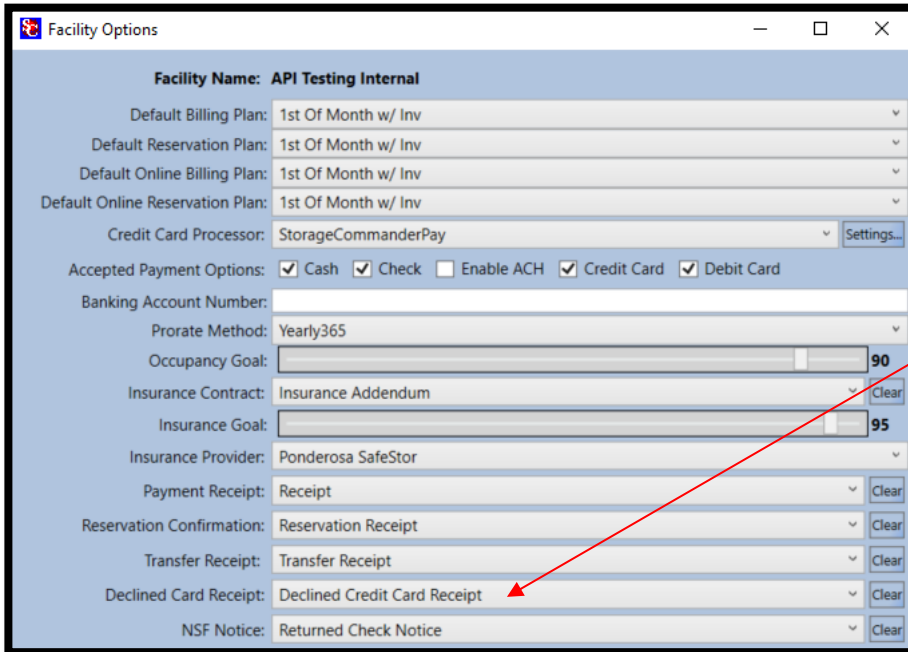
The screenshot shows the 'Facility Options' window for 'API Testing Internal'. The 'Insurance Provider' field is set to 'Ponderosa SafeStor' and has a red arrow pointing to its dropdown arrow. Other fields include 'Insurance Contract' as 'Insurance Addendum' and 'Insurance Goal' at 95.

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

SELECTING PAYMENT RECEIPT, RESERVATION CONFIRMATION AND TRANSFER RECEIPT

To select a payment receipt, reservation confirmation and transfer receipt, click on the down arrow located at the extreme right of each of those corresponding *fields*. From the drop-down menu select the document "**Payment Receipt**", OR on the receipt you would like to have for reservation confirmation, transfer receipt and payment receipt. Once selected this will be the receipt that is printed for all payment transactions.

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



The screenshot shows the 'Facility Options' window for 'API Testing Internal'. It contains several fields with drop-down menus and checkboxes. A red arrow points to the 'Declined Card Receipt' field, which is currently set to 'Declined Credit Card Receipt'.

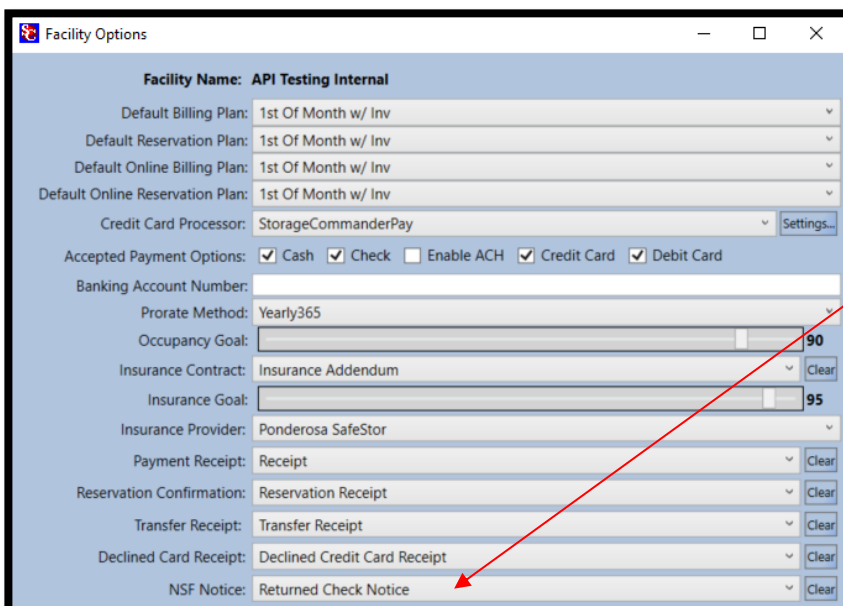
Facility Name:	API Testing Internal
Default Billing Plan:	1st Of Month w/ Inv
Default Reservation Plan:	1st Of Month w/ Inv
Default Online Billing Plan:	1st Of Month w/ Inv
Default Online Reservation Plan:	1st Of Month w/ Inv
Credit Card Processor:	StorageCommanderPay
Accepted Payment Options:	<input checked="" type="checkbox"/> Cash <input checked="" type="checkbox"/> Check <input type="checkbox"/> Enable ACH <input checked="" type="checkbox"/> Credit Card <input checked="" type="checkbox"/> Debit Card
Banking Account Number:	
Prorate Method:	Yearly365
Occupancy Goal:	90
Insurance Contract:	Insurance Addendum
Insurance Goal:	95
Insurance Provider:	Ponderosa SafeStor
Payment Receipt:	Receipt
Reservation Confirmation:	Reservation Receipt
Transfer Receipt:	Transfer Receipt
Declined Card Receipt:	Declined Credit Card Receipt
NSF Notice:	Returned Check Notice

SELECTING DECLINED CARD RECEIPT

To select a **Declined Card Receipt**, click on the down arrow located at the extreme right of the **Declined Card Receipt**. From the drop-down menu select your pre-generated "Declined Card Receipt" once selected this will be the receipt that is printed for all Declined Cards.

Selecting the NSF Notice

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



The screenshot shows the 'Facility Options' window for 'API Testing Internal'. It contains several fields with drop-down menus and checkboxes. A red arrow points to the 'NSF Notice' field, which is currently set to 'Returned Check Notice'.

Facility Name:	API Testing Internal
Default Billing Plan:	1st Of Month w/ Inv
Default Reservation Plan:	1st Of Month w/ Inv
Default Online Billing Plan:	1st Of Month w/ Inv
Default Online Reservation Plan:	1st Of Month w/ Inv
Credit Card Processor:	StorageCommanderPay
Accepted Payment Options:	<input checked="" type="checkbox"/> Cash <input checked="" type="checkbox"/> Check <input type="checkbox"/> Enable ACH <input checked="" type="checkbox"/> Credit Card <input checked="" type="checkbox"/> Debit Card
Banking Account Number:	
Prorate Method:	Yearly365
Occupancy Goal:	90
Insurance Contract:	Insurance Addendum
Insurance Goal:	95
Insurance Provider:	Ponderosa SafeStor
Payment Receipt:	Receipt
Reservation Confirmation:	Reservation Receipt
Transfer Receipt:	Transfer Receipt
Declined Card Receipt:	Declined Credit Card Receipt
NSF Notice:	Returned Check Notice

From the drop-down menu, **select** the document "**Returned Check Notice**", once selected this will be the document that is printed for all returned check transactions.

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

Facility Options

Through the **Facility Options** settings you will define how Storage Commander handles a variety of operational tasks that you use to run your facility(s). Detailed below are the tasks that we have assigned to **Facility Options**.

Placing a **check mark** in the associated box will activate the option for use at your facility. Options that have been selected will be used across all facilities.

Facility Name: API Testing Internal

Default Billing Plan: 1st Of Month w/ Inv

Default Reservation Plan: 1st Of Month w/ Inv

Default Online Billing Plan: 1st Of Month w/ Inv

Default Online Reservation Plan: 1st Of Month w/ Inv

Credit Card Processor: StorageCommanderPay

Accepted Payment Options: Cash Check Enable ACH Credit Card Debit Card

Banking Account Number: 123456789

Prorate Method: Yearly365

Occupancy Goal: 90

Insurance Contract: Insurance Addendum

Insurance Goal: 95

Insurance Provider: Ponderosa SafeStor

Payment Receipt: Receipt

Reservation Confirmation: Reservation Receipt

Transfer Receipt: Transfer Receipt

Declined Card Receipt: Declined Credit Card Receipt

NSF Notice: Returned Check Notice

Facility Options

Void/Credit credit cards on reversed transactions Enable Don't Prorate Update PT Date For Partial Payments

Use Multi-Unit Statements Update PT When Rent Balance Paid Transfer Deposits

Automatically Charge Full Balance

No Print Days

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Blue Moon Contract Interface

Enable Interface Serial Number:

Rounding

Round Calculated Amounts Round To Value: 1.00

Gate Access Codes

Auto Generate Code Length: 4

Insurance

Use Alternate Insurance Label Label:

Move Out Options

Limit Move Out Backdate 0 Days

Additional Logins

Adjustments Charge An Account Merchandise Move In Move Out Return Check Payment

Reservation Reverse Transaction Transfer Update Contract

Default Settings

Gate Timezone: Gate Keypad:

Additional Settings

Last Invoice #: 853 Last Contract #: 1640

Required Fields

Close

Void /Credit cards on reversed transaction

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

Enable Don't Prorate

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

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

Update PT Date for Partial Payments

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

Use Multi-Unit Statements

Prints or emails a single statement/invoice for customer who rent multiple units and have them linked together.

Update PT Date When Rent Balance Paid

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

Transfer Deposit

Placing a check mark in the box for this option will allow the customers deposit to be transferred to a different unit if they choose to transfer units.

Automatically Charge Full Balance

Placing a check mark in this box for this option will charge a unit’s full balance during auto payments.

No Print Days

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

IMPORTANT NOTE: *It’s important to understand how this feature affects the sequence of late processing in Storage Commander. With this feature enabled, a customer who would normally be assigned to a late step on a No-Print Day Storage Commander would not put them into the associated late step and would not print/email the late notice to the customer until the close of business on the next day, thereby extending the late step period by one day. In addition, the number of days to the next late step would also be extended by one day. Ensuring the customer receives the required notification time between late steps.*

Blue Moon Contract Interface

Placing a check mark in the box for this option will enable the interface with Blue Moon. (Only Specific states have required Blue Moon Contracts, please verify if your state is included. (This will be going away **PLEASE NOTE:** Blue Moon is **no longer** an option as they have moved to TSSA.

Rounding

Round Calculated Amounts

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

Gate Access Codes

Placing a check mark in the box for this option will allow your Gate Access Codes to be automatically generated. There is an option to select how many digits you would like in each access code.

Insurance

Placing a check mark in the box for this option will allow your facility to use alternate insurance labels. Once the box is check marked the Label box will be enabled for inputting information.

Move- Out Options

Placing a check mark in the box for this option will allow your facility to limit move out backdates by a specified number of days.

Additional Login

Provides an additional level of security and accountability by requiring the manager who is entering a transaction that has been configured to require an additional login, to enter their login and password to complete the selected process. The additional logins include adjustments, charge an account, merchandise, move-in, move-out, return check, payment, reservation, reverse transaction, transfer and update contract.

Default Settings

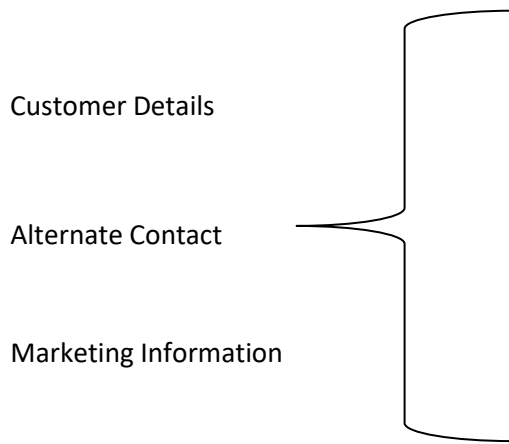
Placing information into the box for these options will set automatic Gate Time zone and Gate Keypad upon move-in.

Additional Settings

Placing information into the box for these options will set the paramotors for invoice numbers.

Required Fields

Placing a **check mark** in the associated box will activate the required fields for use at your facility.



Required Move-In Fields

Customer Information

- Access Code
- First Name
- Last Name
- Address
- Primary Phone
- SSN
- Drivers License Number
- Drivers License State
- Drivers License Exp
- Email
- Birthday

Alternate Contacts

- First Name
- Last Name
- Address
- Primary Phone

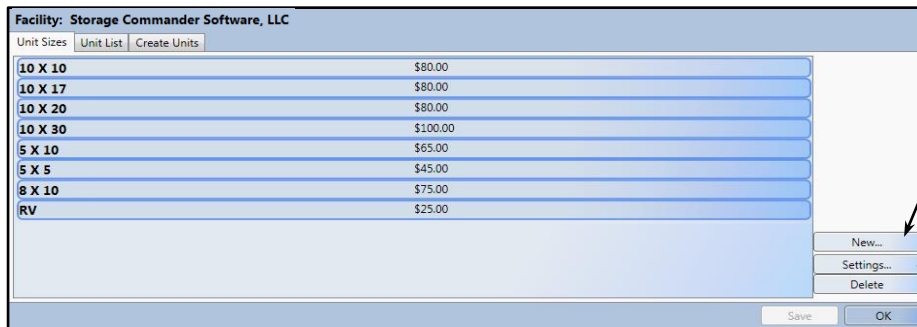
Marketing Information

- Source
- Category
- Reason

OK Cancel

Creating & Editing Units

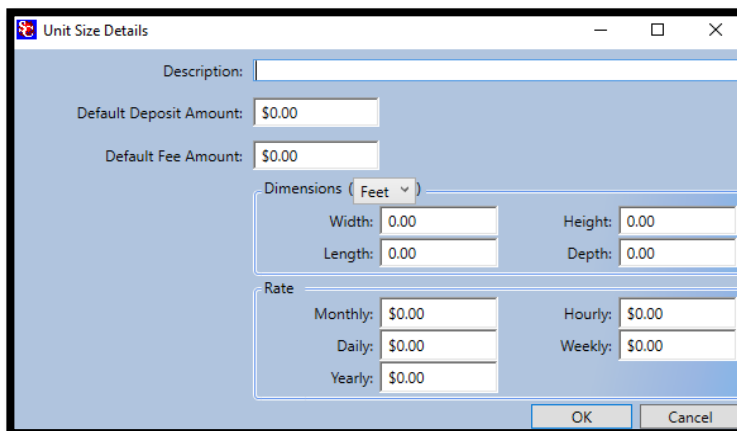
To add new rental units to your facility, or to change the characteristics of existing units, open the **Configuration Manager** and select **Facilities** from the **Company Setup** section. Highlight the facility by *single clicking* on the facility name. Once the facility is highlighted click on the **Rental Units** button to open the Rental Units window, rental unit sizes previously created will be displayed in the list box.



To create a new unit size, click on **New**.

To make changes to an existing unit size, select on the unit size and click **Settings**.

Creating A Unit Size



Before new units can be created a **unit size** will need to be created and made available to be associated with the new unit(s).

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

Enter a size description in the **Description** field. If you charge a special deposit amount for this unit size enter the amount into the **Default Deposit Amount** field. You can also specify a special fee that can be charged against customers occupying this unit size. Enter the fee in the **Default Fee Amount** field.

The dimensions of the unit can be entered in various units of measurements by clicking on the down arrow in the unit of measurement button. The billing rate of the unit can accommodate any or all the unit rate plans listed in the Rates box. Click on the OK button to save the settings.

Viewing Unit List & Features

To view the **unit list**, click on **Unit List**. This will show ever unit that is in the database.

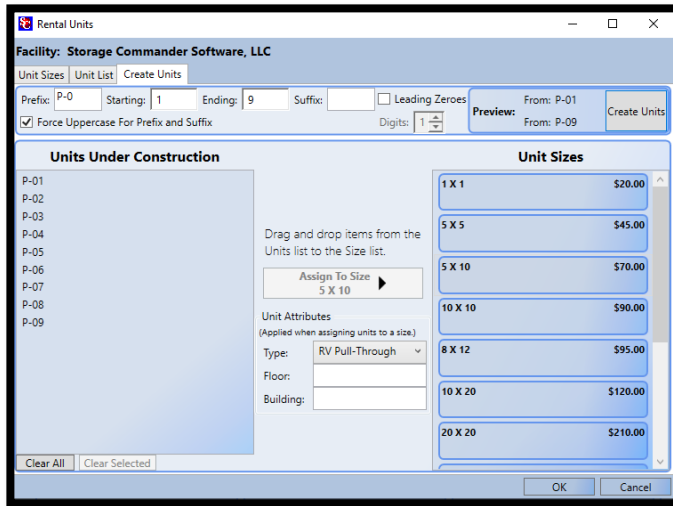
To **Add unit features** to a specific unit, click on the unit number to highlight it and click on the **Check Box** next to the **Unit feature** that needs to be on the unit.

To **change the Unit Details** such as: Size, Status, Condition, add a note, walk through order, click on the unit and the corresponding drop down to change to the status.



NOTE: To change a unit to UNAVAILABLE the unit is required to be in available status.

Creating New Units



Click on the **Create Units** tab located at the top of the screen to open the unit creation window. To start creating units enter the **Prefix** character(s) followed by the **Starting Number** of the unit(s), the **Ending Number**, and the **Suffix** character(s).

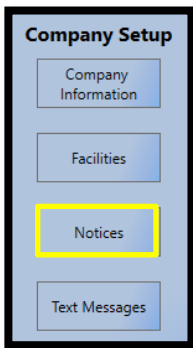
Entering a number in the **Leading Zeros** box will automatically format the unit numbers so that the total number of digits in the unit numbers will remain constant. (In the example above 2 digits were selected, as you can see in the **Preview** and in the **Units Under Construction** list box, a minimum of 2 digits were created for each unit number, with the first 9-unit numbers padded with a zero to maintain a minimum 2-digit configuration.

The Preview window will display a sample of the starting number and ending number so that you can verify the number of units that will be created as well as the format of the unit numbers. Click on the **Create Units** button to create the units and display them in the **Units Under Construction** box.

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

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

****Repeat this process for all the units in the Units Under Construction box.**



Notices & Letters

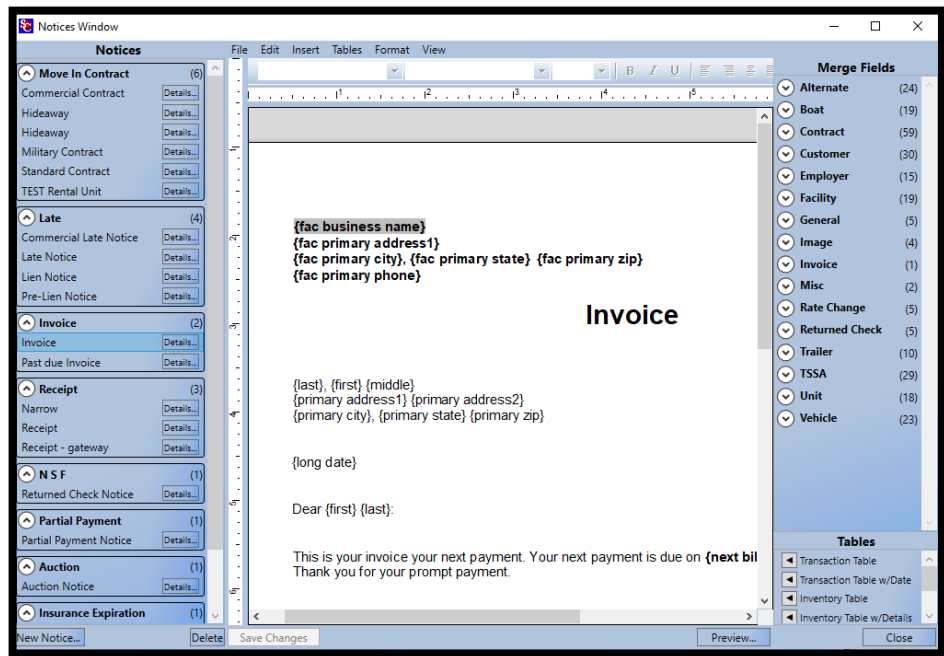
All notices used in Storage Commander can be found in this section. To view or edit any of the notices, **click** on the **Notices** button located in the Company Setup section. This will open the **Notices Window** where you can view, edit and/or create a new notice or letter.

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

Note: Storage Commander comes with multiple pre-defined notices that can be utilized by any facility.

DOCUMENT EDITOR

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



Merge fields can also be inserted into the document or removed from the document. Merge fields allow automatic insertion of specific information contained in the Storage Commander database into the document. This allows you to develop document templates that contain standardized text (such as late notices or welcome letters and use merge fields to alter the template with specific customer information.

Note: Storage Commander Technical Support team can walk you through this process or can help create these notices for your facility.

Page Setup

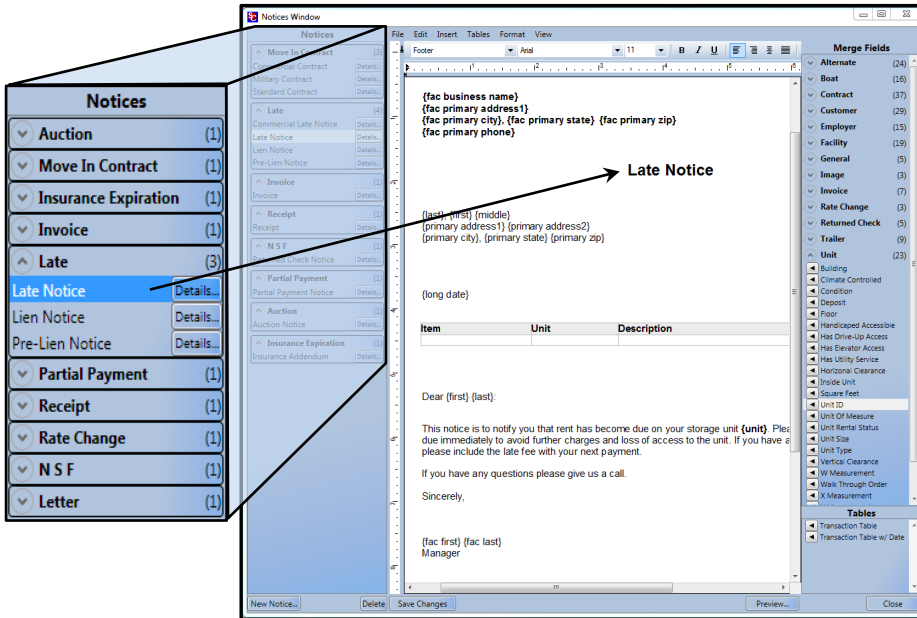
To change the page margins used in the selected document, click on the **File** drop-down menu, and select **Page Setup**. From this window you can change margins and paper size of the document and add columns.

Paragraph Setup

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

EDITING A NOTICE

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

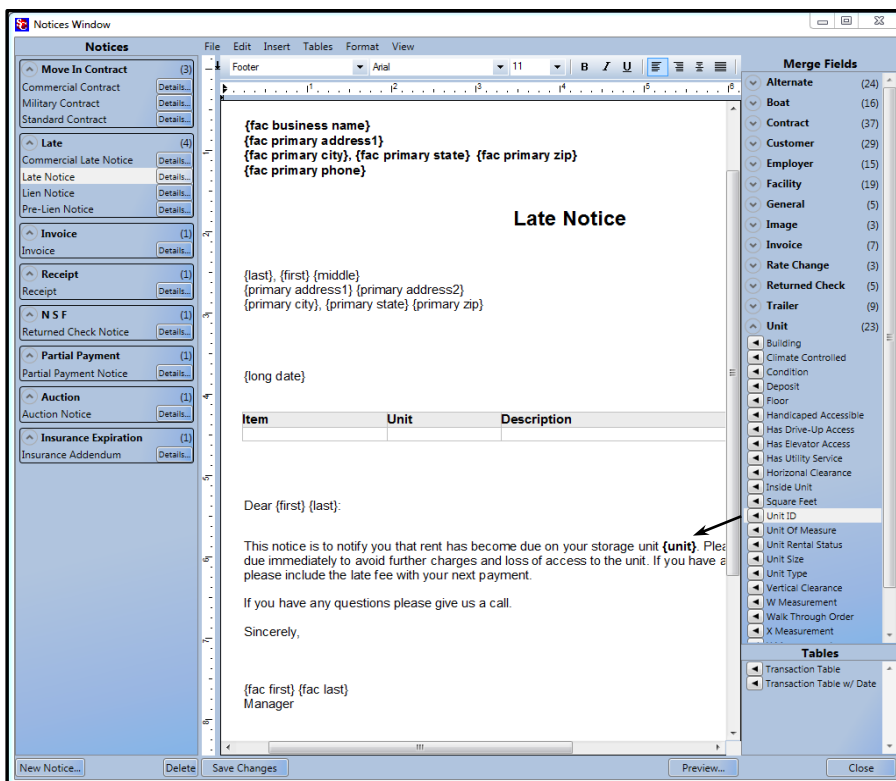


Clicking the arrow button again will collapse the list. **Click** on the document to open it in the editing window. You can use standard Microsoft Word editing commands to insert new text.

Use the tool bar located at the top of the edit window or the Format drop-down menu to change text / paragraph attributes.

ADDING MERGE FIELDS

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

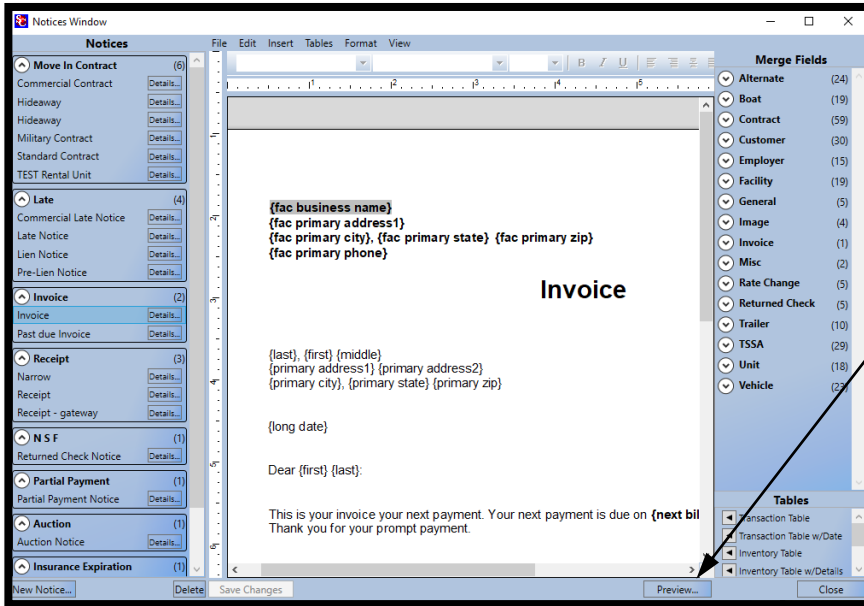


Preview Document

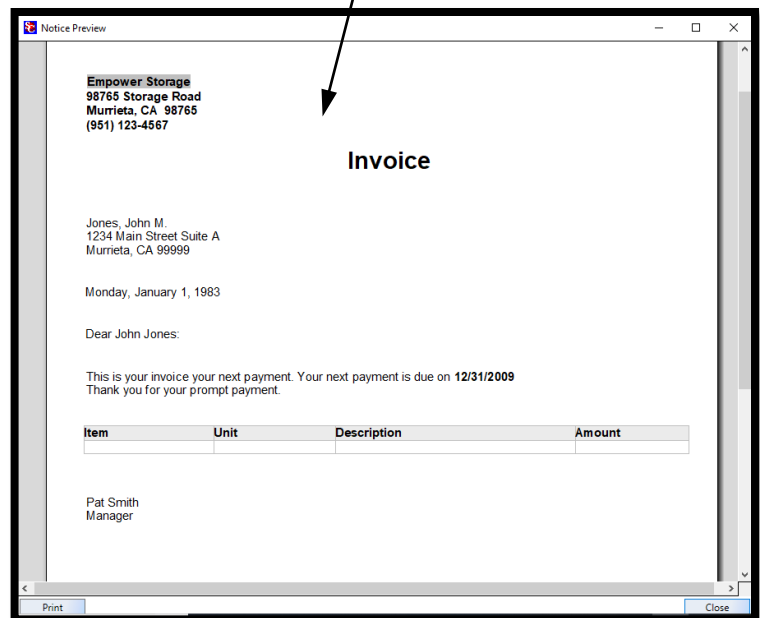
The **document preview feature** allows you to see how the document/letter will look like when it is printed or emailed. This is a great way to verify that the document or letters are formatted the way you like prior to sending it to your customers.

Note: When generated with customer information, the document could look different. To verify it looks correct, generate a document through Storage Commander. **Activities | Generate Documents | Select a customer and document | Click generate documents.**

To use preview simply click on the Preview button whenever you would like to see the document/letter.



Click on the Preview button to see a sample of the document with the merge fields filled in with sample data.



ADDING TRANSACTION TABLES

The transaction table will summarize all past due charges that are currently active on a customer account. Charges that are included in the table are not date range specific meaning that

An example of the Transaction Table is shown below.

Item	Unit	Date	Description	Amount
Type of transaction	Storage unit number	Posting date of transaction items	Description of transaction items	Dollar amount of each transaction item

Item	Unit	Date	Description	Amount
Late Step		10/11/2014		
	Charge		Past Due Charges	
	81	9/26/2014	Military: 9/26/2014	\$120.00
	81	9/26/2014	Military Discount: 9/26/2014	(\$12.00)
			Past Due:	\$108.00
	Charge			
	81	10/11/2014	Late	\$10.00
			Subtotal:	\$10.00
			Ending Balance:	\$118.00

Note: This transaction table was added to the Late Notice.

DELETING A MERGE FIELD

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

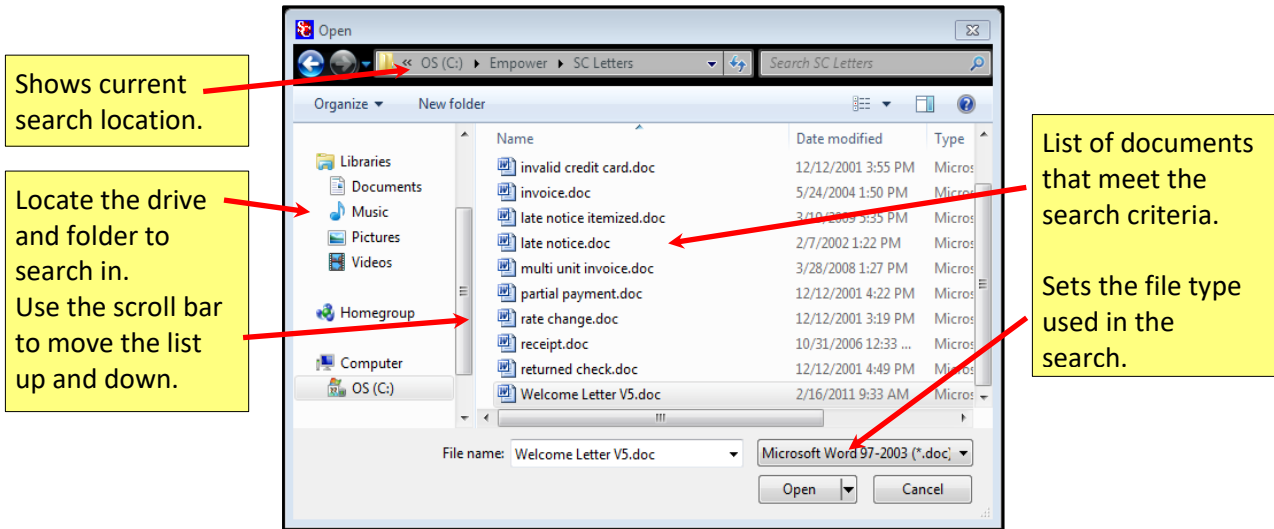
MODIFYING FONT ATTRIBUTES IN A MERGE FIELD



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

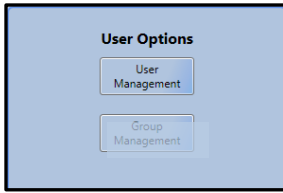
IMPORTING WORD DOCUMENTS

Click on the **New Notice** button and select **Import Word Document**, this will open a Search box, you can import two different file types in a word document format- **.doc** (Word 2003 and older word documents), or **.docx** (Word 2007 and newer word documents). Use the file filter button located in the bottom right of the Search box to show only doc files or docx files. When you see the document in the list box, **double click** on it to open it in the editor, or you can click on the document one time and then click on the **Open button** to open the document in the Storage commander editor window.



User Options

User Management

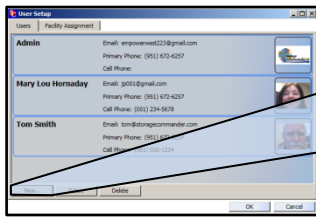


Setup new managers, record photo id and fingerprint access, select group security level, and assign manager to a facility(s).

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

Important Note: Only Administrators who have logged in and have created a Logon and Password will be able to setup a new manager or edit the security setting for existing managers.

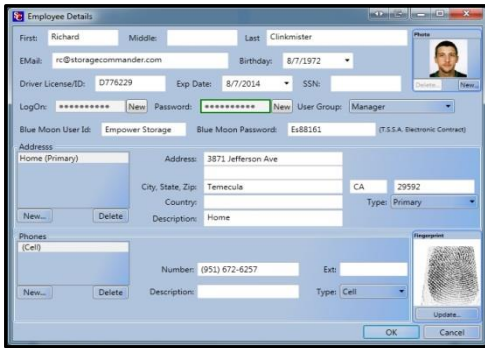
SETTING UP A NEW USER



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

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

The Employee Details screen appears



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

NOTE: The only required field

To enter a Logon and Password, **click** on the **NEW** button next to the associated field and enter the data, keeping in mind that both the Logon and Password have **no limitations** but are **case sensitive**, meaning that both UPPER- and lower-case characters are allowed, requiring the Logon and Password to be entered by the user using the same credentials.

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

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

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

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

Adding Employee Photo ID



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

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

In the New Photo window, enter the name of the employee in the **Reference Name** field and select the device you will be using to capture the image from, or select

Import if the image is stored in an electronic format on your hard drive or other storage media.

Using the Excella Multi-purpose Scanner

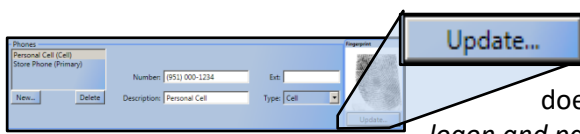
The Excella multipurpose scanner only accepts photo id cards that are the same size as U.S. driver licenses. If you would rather use a picture of the managers face, you will need to use the Storage Commander photo id camera.

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

Importing an Image

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

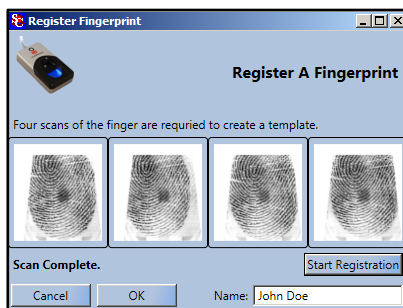
Adding a manager's fingerprint



Fingerprint identification allows the manager to maintain a secure access to the program. With fingerprint id the manager does not need to memorize their logon and password (*although a logon and password must be assigned during the profile setup*) for access into

the program, placing their finger on the fingerprint scanner will automatically identify the manager and allow them into the program with the pre-assigned security settings

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



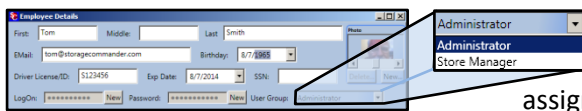
Four scans will be used during the registration process to verify that a good image has been captured, after the fingerprint has been successfully registered, a single scan is all that will be needed to identify the manager. Click on the OK button to save and complete the process.

An image of the fingerprint will be displayed in the fingerprint window.

Setting a Managers Security Level

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

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

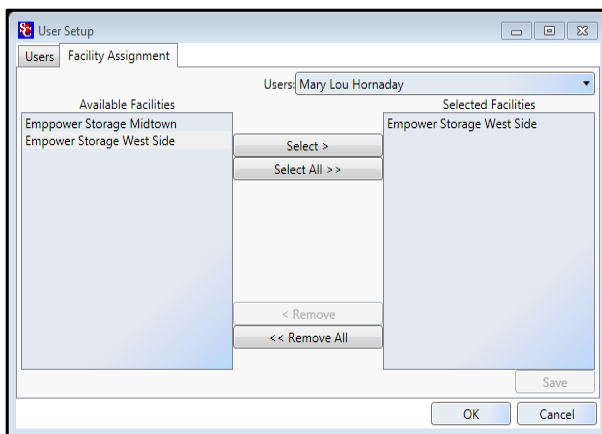


Click on the **User Group** button to open a drop-down list of available security profiles. Click on the security profile to be assigned to this manager. To assign the new security to the managers profile click on the Save button, located at the bottom of the Employee Detail window.

Security profiles are created in Group Management.

Assigning Manager to a Facility(s)

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



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

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

To transfer the manager to the facility(s) click on the **Save** button.

Group Management

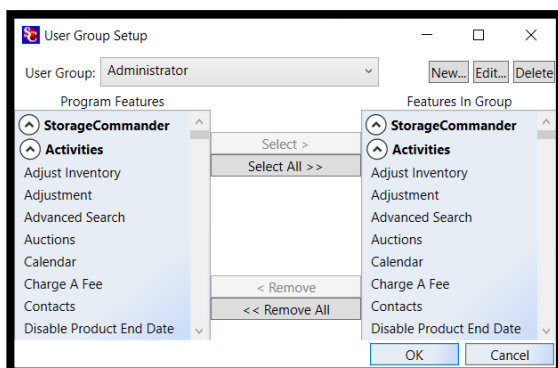
Under Group Management you can create new security profiles or edit existing security profiles. Once a security profile has been created it can be attached to a manager's profile by opening the User Management window, selecting the manager, and attaching it to the manager's profile.



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

CREATING A SECURITY PROFILE

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



The User Group Setup window is comprised of two panels, **Program Features** and **Features in Group**. The items listed in the program features panel are functions that can be assigned to the security profile you are creating.

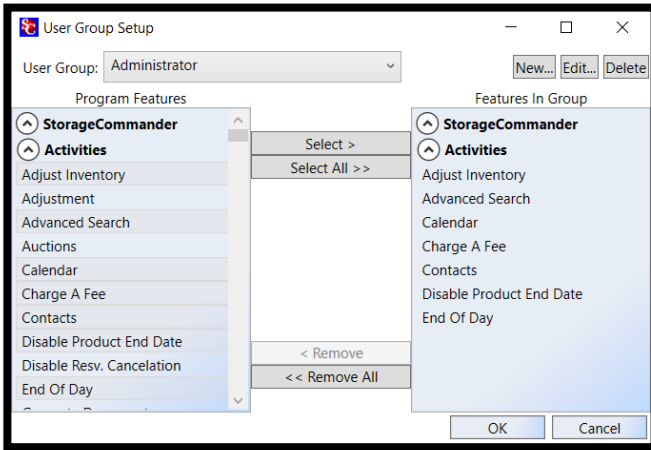
In the sample screen shot to the left there are two items in the program features list box **Storage Commander** and **Configuration Manager**, clicking on the arrow next to an item in the list will either open the drop-down menu for that item or close the menu for that item.

ADDING PROGRAM FUNCTIONS TO A SECURITY PROFILE

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

Click on Storage Commander in the Program Features list box, next select a function category from one of the

Storage Commander drop down menu items, in this example I chose Activities.



Selecting items in the list is accomplished by clicking on an item in the list and then clicking on the Select button located in the center section between Program Features and **Features in Group** list boxes.

You can select multiple items by holding down the Ctrl key on your keyboard while selecting multiple items in the list box, when you have selected all the items release the Ctrl key and click on the Select button to transfer all the highlighted items into the **Features in Group** list box.

To select all the items in a drop-down menu, click on the Select All button.

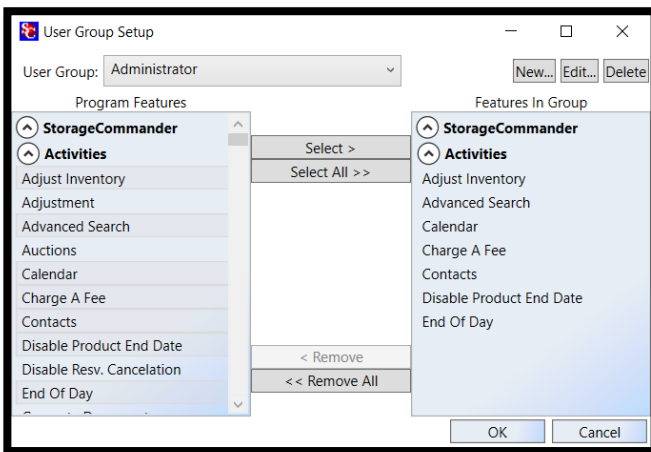
REMOVING PROGRAM FUNCTIONS FROM A SECURITY PROFILE

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

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

EDITING AN EXISTING SECURITY PROFILE

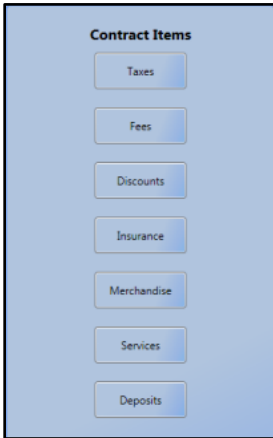
In the **User Options** section of the Configuration Manager click on the **Group Management** button. Locate the User Groups field and click on the down arrow to open the drop-down list of existing security profiles.



To add additional program functions, select the program function from the Program Features list box and click on the Select button to add the new function to the active security profile.

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

Contract Items

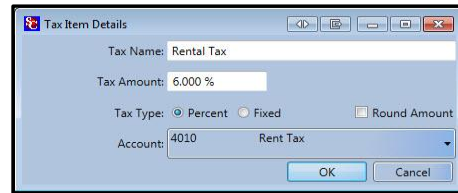
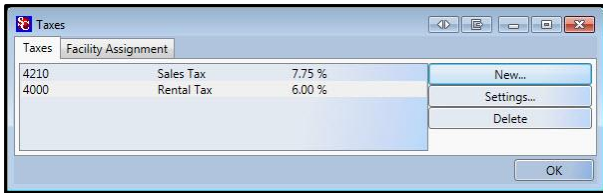
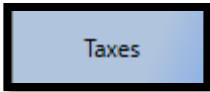


In the Contract Items screens you can create charge and discount items that can be attached to customer accounts. Charge items can include rent tax, sales tax, fees, or any other type of charge transaction you use in your facility. Additionally, you can create discount transaction types, such as move in specials, referrals, or other discounts.

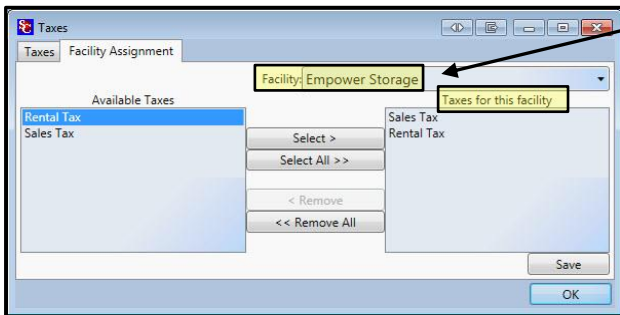
During the creation of a fee or discount you will be asked to associate the fee or discount with the corresponding account number identified in the **Chart of Accounts** (see Chart of Accounts, located in the accounting section of the Configuration Manager). This allows Storage Commander to track transactions by account number

Creating Tax Items

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



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



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

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

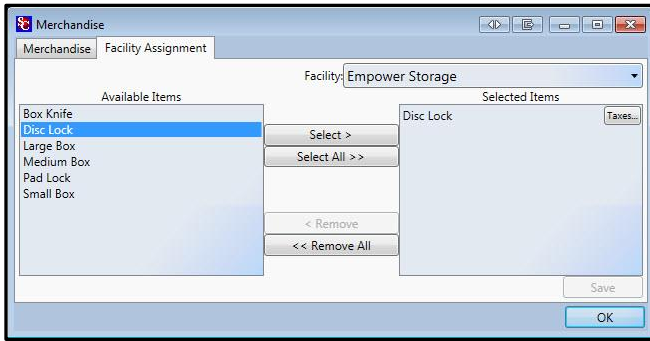
REMOVING A TAX ITEM FROM A FACILITY

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

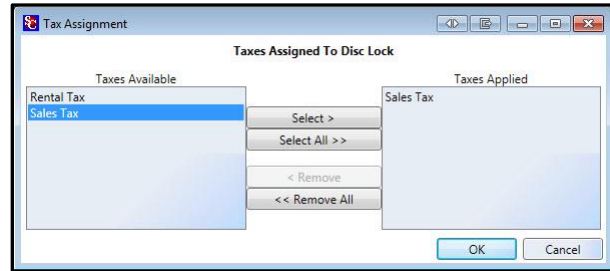
Removing a Tax Item will prevent the tax from being assigned to new facilities and removes the tax item from the selected facility. However, the tax item will **NOT** be removed and will remain active on customer accounts at the selected facility where the tax item has been previously attached. To change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

Assigning Tax

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



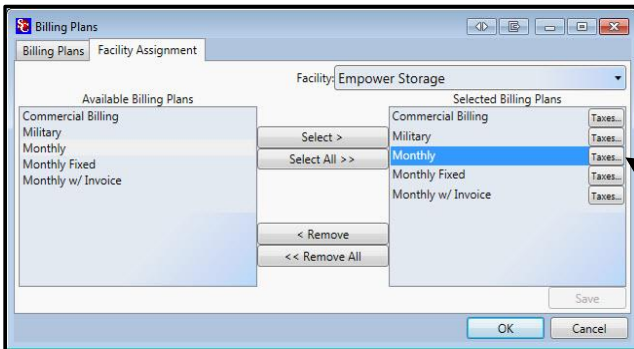
Click on the **Taxes** button to open the **Tax Assignment** window and select the tax type that will be associated with the sales item.



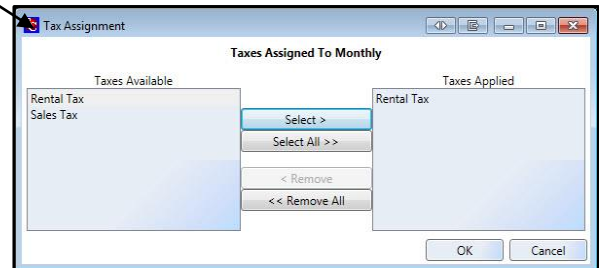
Assigning Tax to Rent

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

The **Tax Assignment** window will now open allowing you to select the Tax item you will use as rental tax at the selected facility.



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



Fees

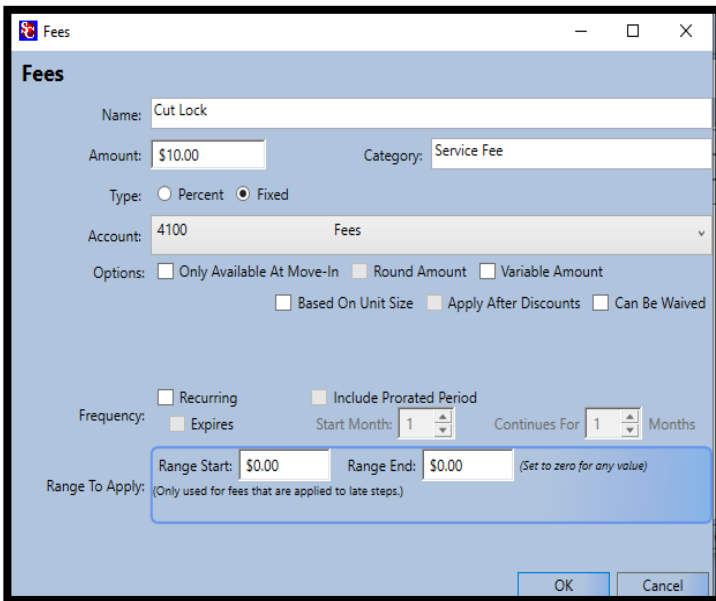
Creating Fees

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



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

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



Only Available at Move-In

When selected only allows this fee to be available at Move-In.

Round Amount

If the fee is configured as a percent, enabling this function will round the fee amount up or down at .50¢

Can Be Waived

When selected allows fee to be waived, using the wave fee selection in the payment window.

Based on Unit Size

If this box is checked the fee that will be charged will be based on the fee associated with the unit size.

*(See **Creating & Editing Units** for information on assigning fees based on unit sizes)*

Apply After Discounts

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

Frequency

Recurring

If this option is attached to a fee and the Expires option is not selected, the fee will be charged to the customer account each billing period.

Expires

Selecting this option allows the fee to become active as soon as it is placed on a customer account (select Starts in Current Month), or at some time in the future (select Starts x months After Current Month), and run for a predetermined number of months (Continues For x Months)

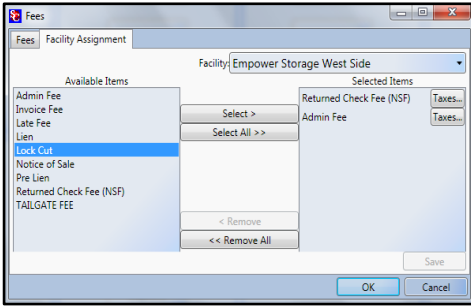
Range to Apply

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

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

ASSIGNING FEES TO A FACILITY

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

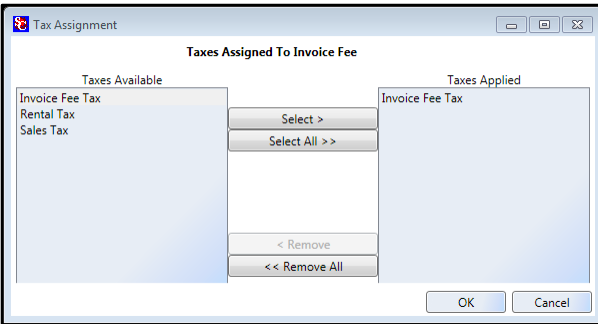


To transfer (assign) a fee or multiple fees to a specific facility click on the **Facility Assignment** tab to open the Fee Assignment window. Click on the down arrow in the **Facility** field and select the facility that you will be assigning this fee item too.

Locate the fee item from the list in the **Available Items** list box. With the fee item highlighted click on the **Select** button to copy the fee item into the **Selected Items** box.

ASSIGNING A FEE AS TAXABLE

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



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

EDITING A FEE

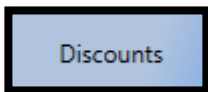
To edit an existing fee, locate the fee in the **Fees** window, with the item highlighted, click on the setting button. This will bring up the **Fees Details** window, make the changes to the fee and click on the OK button to save the changes and close the window.

DELETING A FEE

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

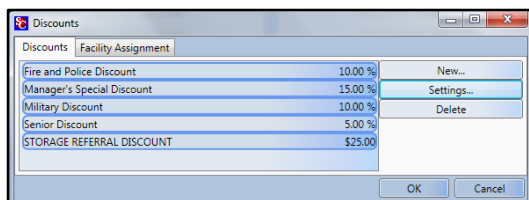
Deleting a fee will prevent the fee from being assigned to new facilities and removes the fee from the selected facility. However, the fee will not be removed and will remain active on customer accounts at the selected facility where the fee has been previously attached. Removing the fee from the *customer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

Creating Discount



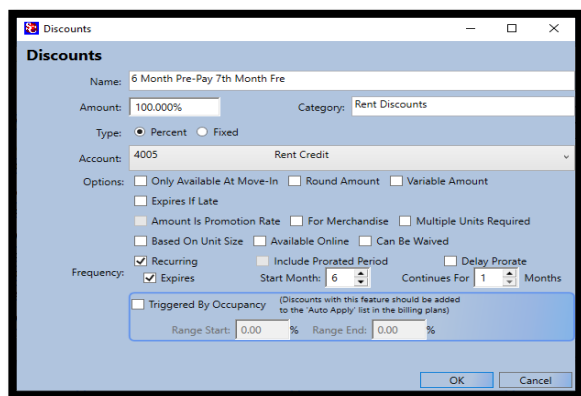
To Create Discounts that can be used at the facility (such as: Referral discount, ½ Month off, Free Month...), Click on the **Discounts** button in the **Contract Items** section.

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



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

your chart of accounts (*typically this would be assigned to account number 4600 – Rent Discount*).



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

Only Available At Move-In

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

Round Amount

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

Variable Amount

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

For Merchandise

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

Amount Is Promotion Rate

With this option selected the system will automatically calculate the discount needed on the rental rate to equal the value entered the **Amount** field. Only available at move-in.

(this can only be used when the **Type** selection is set to **Fixed**) *An example of this discount would be a \$1.00 Move-In Special*

Multiple Units Required

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

Based on Unit Size

Will allow a discount to be applied to any specific unit size.

Expires If Late

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

Can Be Waived

Allows the discount to be waived on any contract.

Available Online

Allows the discount to be available online.

Frequency

Recurring

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

Expires

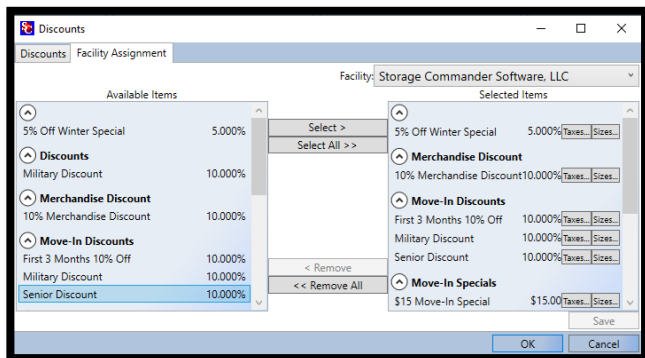
Allows the discount to self-activate (x) number of months from the month the discount was added to the account (**Starts After Current Month**) and run for (x) months (**Continues for (x) Months**).

Include Prorated Period

Delay Prorate

ASSIGNING DISCOUNTS TO FACILITIES

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



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

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

To assign taxes to a specific discount click on the **Taxes** box and highlight the appropriate tax and click **OK**.

To assign the discount to a specific size, click on the **Sizes** box and highlight the appropriate size(s) that the discount applies to and press **OK**.

EDITING A DISCOUNT

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

DELETING A DISCOUNT

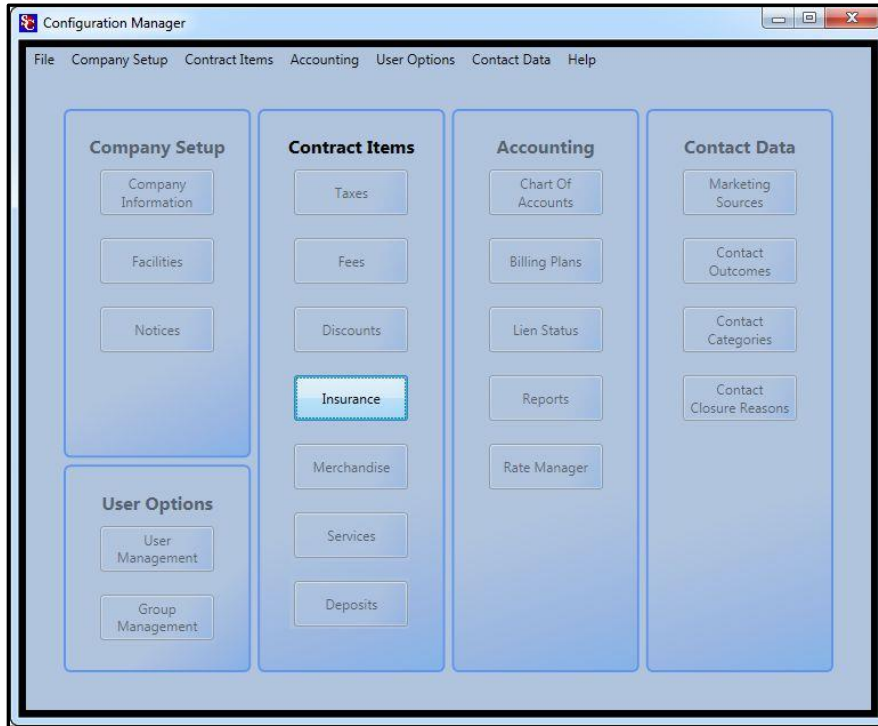
To delete an existing discount, locate the Special discount in the Discounts window, with the discount highlighted, click on the Delete button.

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

Setting Up Insurance Providers

Adding New Insurance Providers

From the Configuration Manager opening screen, click on the **Insurance** button in the **Contract Items** column.

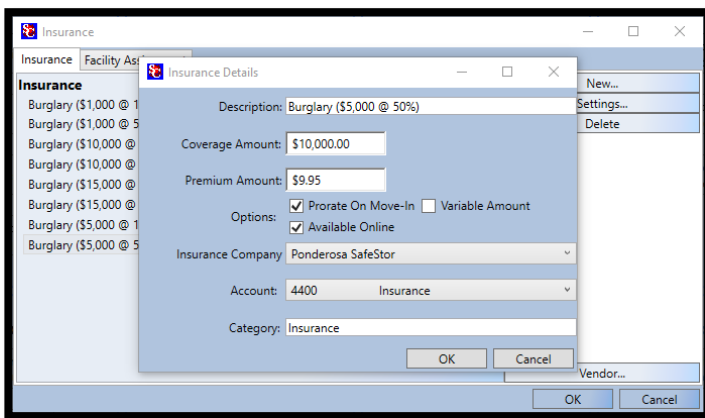


The **Insurance** window will open listing any insurance companies that have been previously installed. Click on the **Vendors** button to open the **Vendors** setup window and click on the **New** button to create a new insurance vendor.

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

SETUP/EDIT NEW INSURANCE POLICIES

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



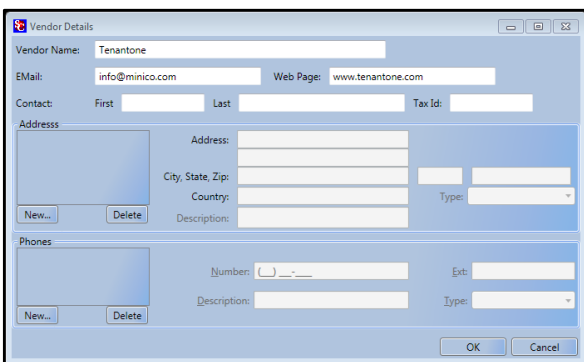
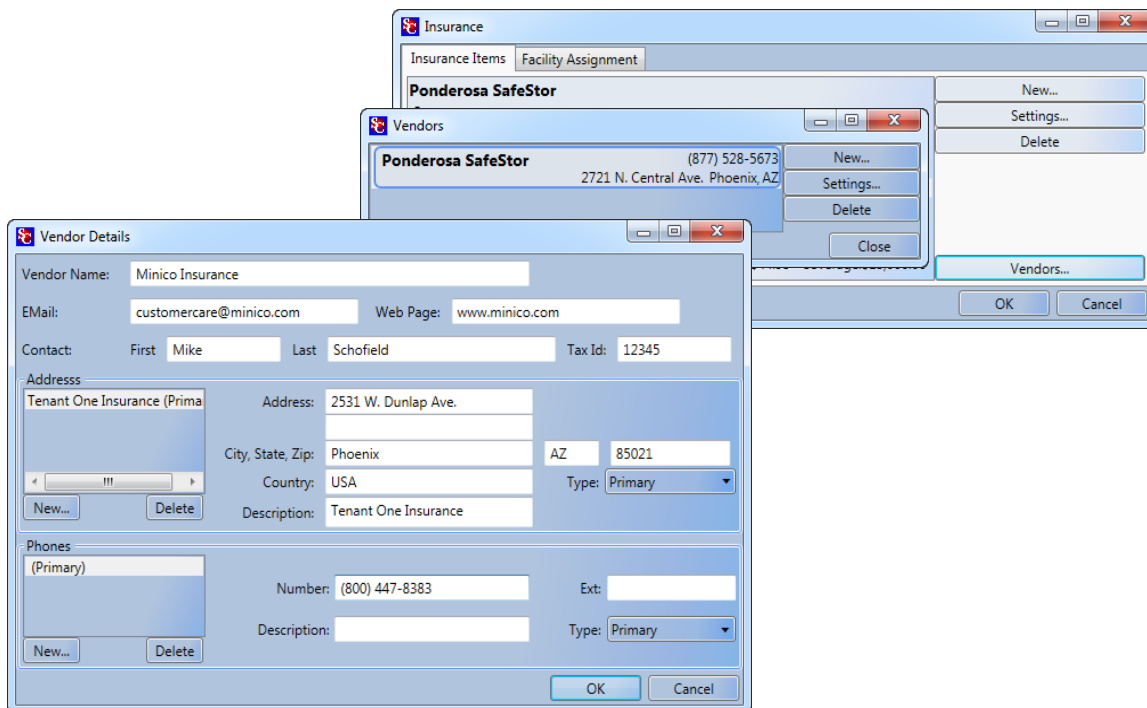
This will open the **Insurance Items** window, enter the name of the insurance policy in the **Description** field, the amount of insurance coverage for this policy in the **Coverage Amount** field, and the amount that will be charged to this customer for this insurance policy in the **Policy Amount**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

There are additional options such as: **Prorate on Move-In, Variable Amount and Available Online**. Click on the down arrow in the **Insurance Company** field to show a list of insurance providers (Vendors) that were installed previously. Select the insurance provider for this policy from the list. In the **Account**

field click on the down arrow to open a list of available accounts and select the account to assign this insurance transaction to from the list. If you would like to create sub-categories under the insurance provider name, you can enter the name of the category in the **Category** field.

Editing a Policy

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



ADDING A NEW ADDRESS

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

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

ADDING A NEW PHONE NUMBER

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

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

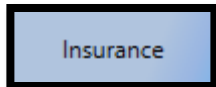
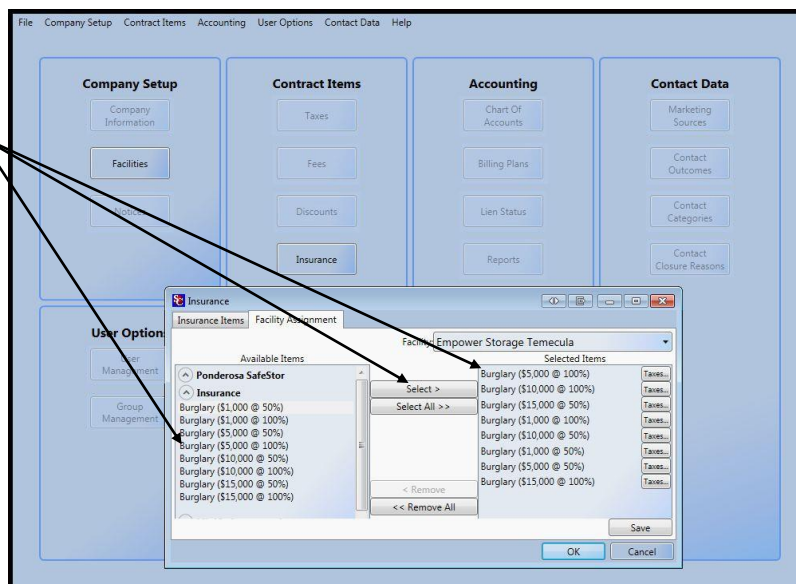
NOTE: Data entered in the Description field will also added as a description in the **Phones** list box.

Adding Insurance Policies to a Facility

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

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

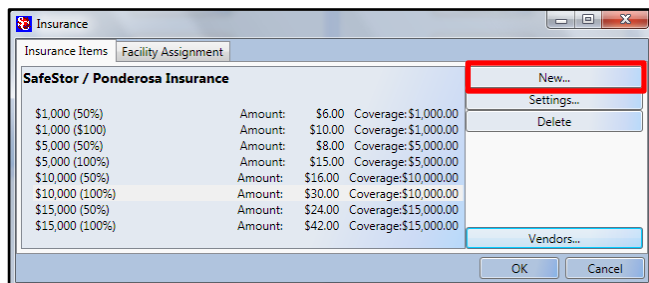
Click on the individual insurance policies to highlight the policy, click on the **Select** button to move the selected items into the **Selected Items** list box. To select multiple items, hold the **Shift** key down while selecting items. To select all items, click on the **Select All** button.



Insurance

To install a new insurance provider into the system, click on the **Vendors** button in the Insurance window

DELETING A INSURANCE POLICY



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

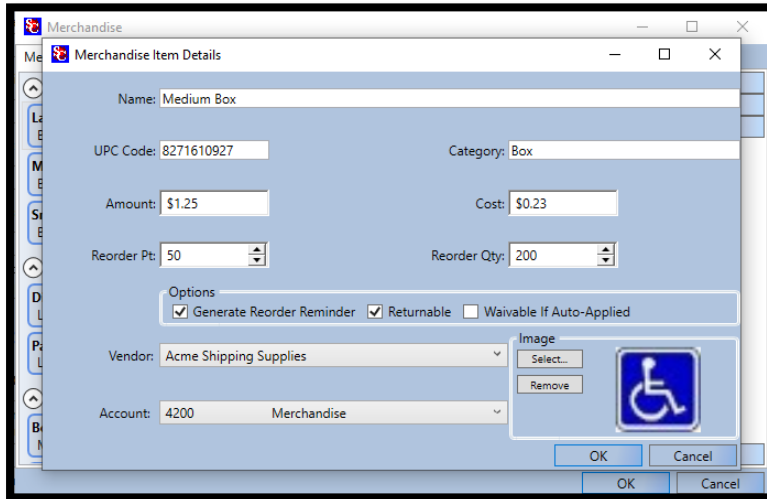
Deleting a policy will prevent the policy from being assigned to new facility and remove the policy from available policies at the selected facility. The policy will remain in effect for Customers who had the policy assigned to their unit prior to it being deleted.

NOTE: Deleting the insurance does not remove the policy from any customer accounts that the policy has been previously assigned to.

Setup Merchandise

Merchandise

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



To add an inventory item into the system, click on the **New** button to open the **Product Item Detail** window. Enter the Name of the item, the UPC barcode number (*this is optional field designed to work with a barcode scanner*).

To enter vendor information to aid in reordering merchandise, select the **Vendor** button located at the bottom of the Merchandise window and click on New to setup a new vendor.

The **Category** field allows you to separate merchandise items by their category for example, creating Locks and **Boxes categories** will allow you to place all your

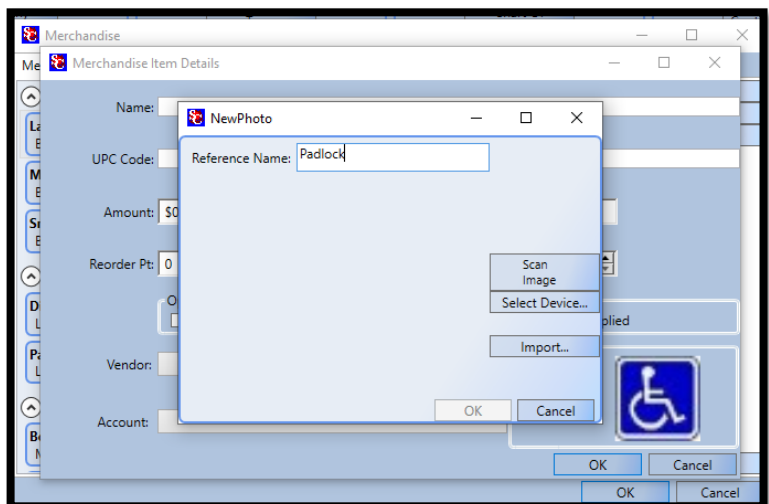
box merchandise items under the Boxes category, and your lock merchandise items under the Locks category making it easier to locate merchandise items by category.

Now enter the **Amount (sell price)** of the item and **the Cost (your purchase price)** of the item (*if we have the sell price and the cost of the item you will be able to see merchandise profit in the financial reports*).

The **Reorder Point** sets your minimum inventory point and will generate a low inventory alert if you select **Generate Reorder Reminder**. The **Reorder Qty.** field will display the recommended quantity of the item to reorder when the system detects that the item is at or below the reorder point. If the merchandise is returnable, click on the **Returnable** option to allow this item to be returned for a refund.

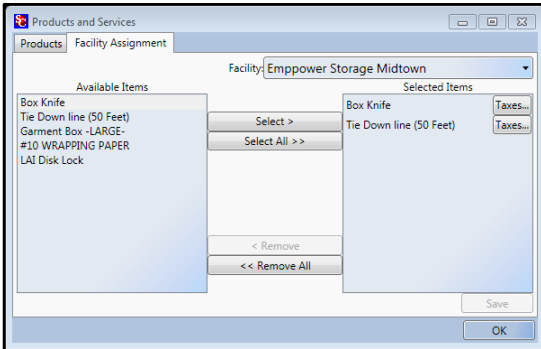
If you have setup a vendor for this item, click on the down arrow in the **Vendor** field to select the vendor you used to purchase this item from. The last step is to assign an account number used for merchandise sales. To do this click on the down arrow in the **Account** field, this will open the chart of accounts; locate the account number you have assigned for merchandise sales and click on it to assign it to this merchandise item.

To select an image for the item, click on Select. The **New Photo** window will open, at this point you will name the item with a unique **Reference Name**, followed by scanning an image, select device or import an image from a file on the computer.



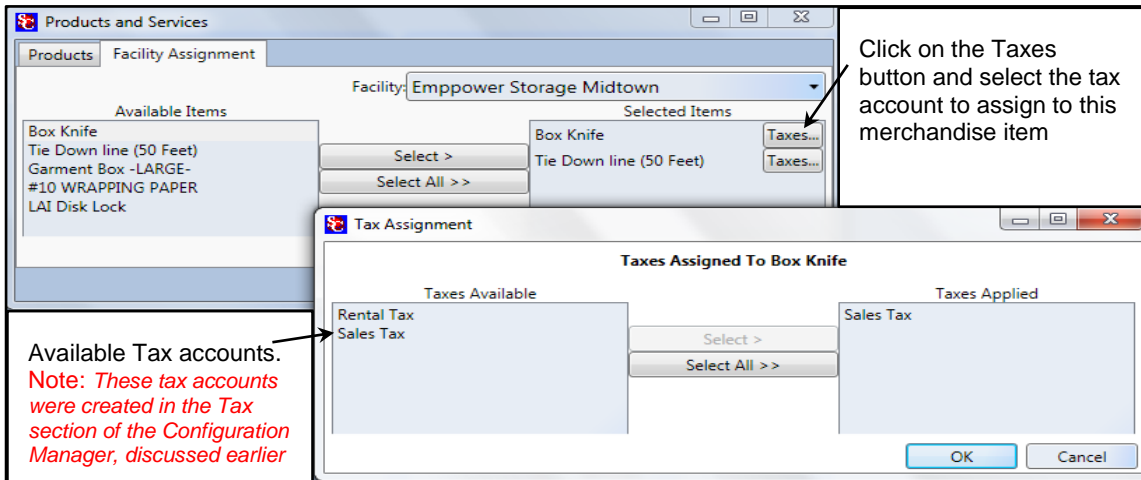
ASSIGNING MERCHANDISE TO A FACILITY

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



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

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



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

EDITING A MERCHANDISE ITEM

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

DELETING A MERCHANDISE ITEM

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

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

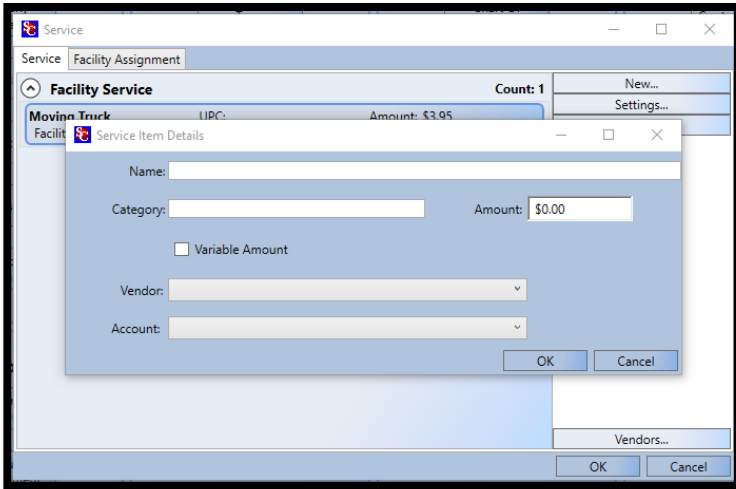
RECEIVING MERCHANDISE AT THE FACILITY

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

Services

Setup Services

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



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

Click on the **New** button to open the Service Item Detail window. Enter the name of the service you are creating, the Category name this service will be listed under, in the Amount field enter the amount to charge for this service.

There is an option to make the **Service Item** a **Variable Amount**.

If this service is provided by an outside company, and you have entered the company information as discussed above, you can select the company from the list of vendors by clicking on the down arrow in the Vendor field. Select the account number to charge this service against by clicking on the down arrow button in the Account field and selecting the account number from the chart of account list.

Editing A Service

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

Deleting A Service Item

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

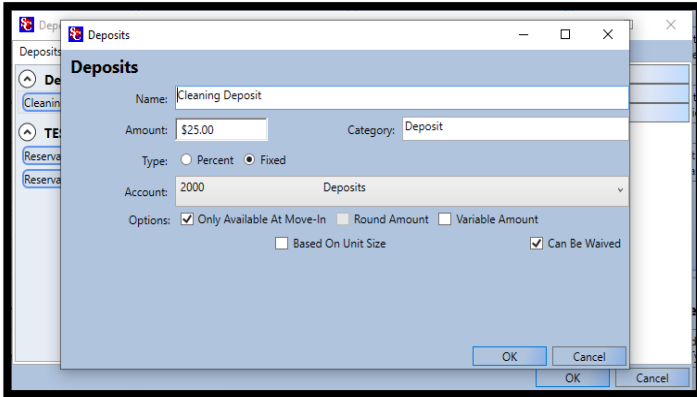
NOTE: Deleting a service will prevent the service from being assigned to new facilities; it does not remove the service from any customer accounts that the service has been previously assigned to.

Deposits Accounts



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

Creating A Deposit



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

Only Available at Move-In

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

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

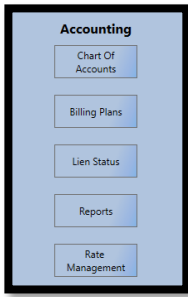
EDITING A DEPOSIT

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

DELETING A DEPOSIT

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

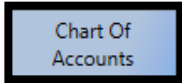
NOTE: Deleting a deposit will prevent the deposit from being assigned to new facilities and removes the deposit from the selected facility. However, the deposit will not be removed and will remain active on customer accounts at the selected facility where the deposit has been previously attached. Removing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



Accounting

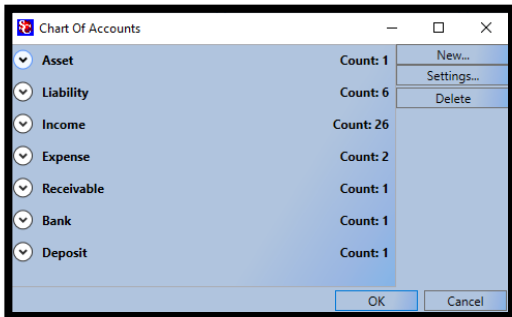
The Accounting section of the Configuration Manager is where you setup and configure the **Chart of Accounts** in the Storage Commander program to match the chart of account units that your accountant / CPA uses for your facility. This section will also show you how to create billing policies (how you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

Creating the Chart of Accounts



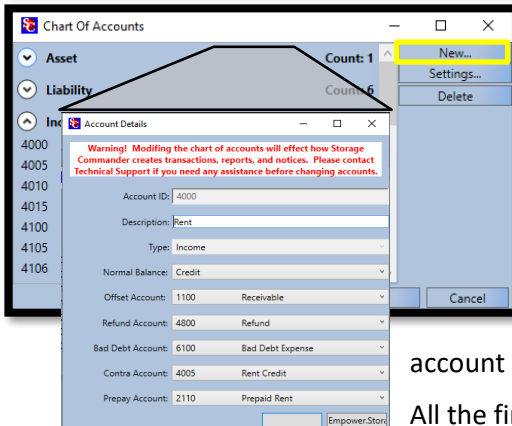
Selecting this setup option allows you to configure the Storage Commander chart of accounts to match the chart of accounts used in your company’s accounting system.

Clicking on the **Chart of Accounts** button in the accounting section, will open the Storage Commander-Chart of Accounts window.



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

To create a new account class, click on the account category for the account class you will be creating, this will expand the list of account classes already created for this category. Now click on the **New** button to open the **Account Details** window, in the Account ID field enter the account number you use in your accounting system for this transaction type, in the **Description** field enter the name for this item.



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

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

EDITING THE CHART OF ACCOUNTS

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

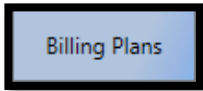
DELETING AN ACCOUNT CLASS

To delete an existing account class, open the Storage Commander **Chart of Accounts** window and locate the account category where the account class resides, with the account class highlighted, click on the Delete button, when asked for verification of the delete request click on the Yes button to delete the account class from the chart of accounts.

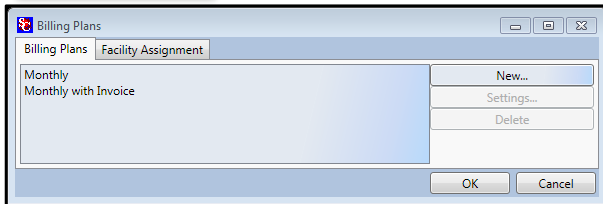
Billing Plans

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

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



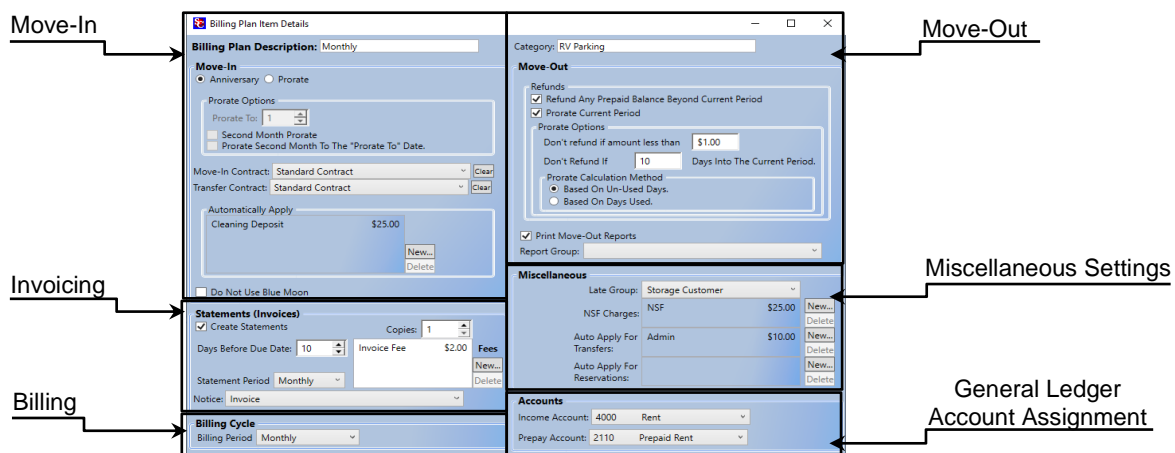
CREATING A BILLING PLAN



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

Click on the **New** button to open the **Billing Plans Detail** window.

The **Billing Plan Items Detail** window is split into six sections; **Move-In, Move-Out, Statements (Invoices), Billing Cycle, Miscellaneous** and general ledger **Accounts** assignment.



CREATING A MOVE-IN POLICY

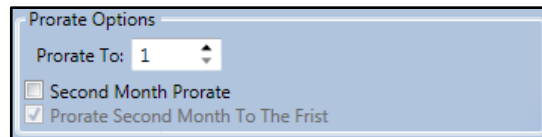
First determine if this billing plan will be based on **Anniversary** or fixed month **Prorate**

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

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

PRORATE OPTIONS

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



Prorate Options
Prorate To: 1
 Second Month Prorate
 Prorate Second Month To The Frist

NOTE: Anyone on this billing plan would be prorated to the 15th of the month.

Second Month Prorate:

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

Prorate Second Month to the "Prorate To" Date.

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

- Second Month Prorate.** Prorated rent will become due on the (1st) first of the month following the move-in month (2nd month).
- Prorate Second Month to the "Prorate to" Date.** Prorated rent will become due on the calendar day of the move-in on the 2nd month (example: if the customer moved in on the 17th of the month, the prorated rent will be due on the 17th of the next month, with subsequent rent due on the 1st of each month thereafter).

Move-In & Transfer Contracts

Storage Commander will automatically generate a move-in or transfer contract, with the customer information, unit information and other relevant information already filled in by merge fields. Additionally, an exact copy is saved to the customer account and can be reprinted at any time.

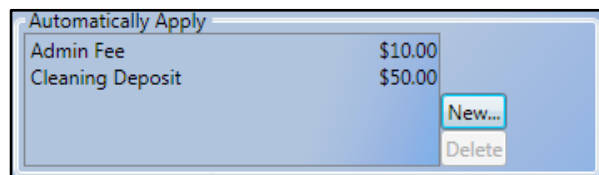
SELECTING A MOVE-IN OR TRANSFER CONTRACT.

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

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

AUTOMATICALLY APPLY

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



Automatically Apply	
Admin Fee	\$10.00
Cleaning Deposit	\$50.00

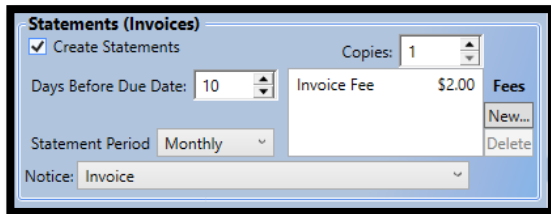
New...
Delete

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

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

Setting Auto Invoicing

Invoices can be automatically printed during the manual end of day process or automatically generated and added to the Document Queue at the automatic end of day process where you can print/email or view them.



To allow invoices to be automatically generated, place a check mark in the **Create Statements** box to print the invoices. Next, determine how many days' notice you will give your customers of rent becoming due. Enter the number of days' notice in the **Days Before Due Date** field. If more than one copy of the invoice is needed, enter the number in the **Copies** field.

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

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

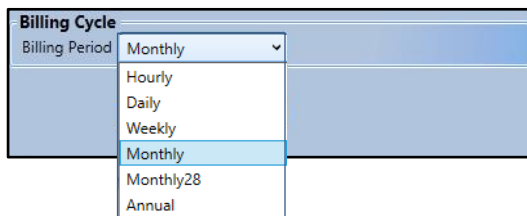
Note: Statements / Invoices are created in the **Notices** section of the **Configuration Manager** under Company Setup.

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

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

SETTING THE BILLING CYCLE

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



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

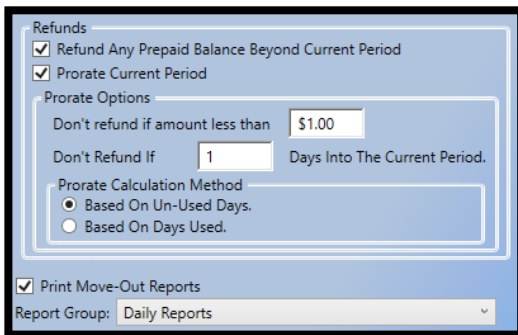
Move-Out

CREATING A MOVE OUT POLICY

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

The following setup parameters will allow you to configure the **Move-Out** function of Storage Commander to meet your requirements.

SETTING REFUND & PRORATE POLICIES



- **Refund Any Prepaid Balance**

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

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

- **Prorate Current Period**

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

- **Always Refund**

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

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

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

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

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

- **Print Move-Out Reports**

By checking this box, the associated reports will generate automatically at the cadence and *Report Group* you choose.

- **Report Group**

PRORATE CALCULATION

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

- **Based On Un-Used Days**

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

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

- **Based On Days Used**

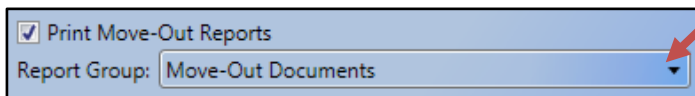
This function adds the number of days in the current billing period the customer has occupied the unit, multiplies the sum with the daily rate (derived from the Prorate Method) than divides the result by the rental rate of the unit (the rental rate will be a factor of the base rate of the unit less any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

Formula = number of days used x daily rate.

MOVE OUT REPORT

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

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



The screenshot shows a user interface element with a checked checkbox labeled "Print Move-Out Reports". Below it is a dropdown menu labeled "Report Group:" with the text "Move-Out Documents" displayed. A red arrow points to the small downward-pointing arrow on the right side of the dropdown menu.

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

Miscellaneous

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

To attach a **Late Group** to a **Billing Plan** it must have been previously created. To create a **Late Group**, go to the section **Creating Late Groups** in this manual.

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

Miscellaneous	
Late Group:	Storage Customer
NSF Charges:	NSF \$25.00
	Charge Back Fee \$15.00
Auto Apply For Transfers:	Transfer Fee \$10.00
	Reservation Deposit 100.000%

- **Late Group**

Click on the drop down in the **"Late Group"** field to display a list of available late groups. To select the late group for this **Billing Plan**, locate it in the list and click on it.

- **NSF Charges**

To have Storage Commander automatically apply NSF fees or additional fees (some facility operators will charge a processing fee in addition to the NSF fee), click on the **New** button to open the Fee & Discount list box,

scroll down to the Fees section and select the fee to post to an account for a returned check event. Repeat this process if additional fees are used for NSF.

- **Chargeback**

Fees can be automatically applied to a customer's account when a credit card is charged back to a tenants account. To add a fee or discount click on "New" to open the Fee & Discount list, scroll down to the Fees section and select the fee to post to an account for a unit transfer.

- **Auto Apply for Transfers**

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

- **Auto Apply for Reservations**

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

Deleting (Removing) Miscellaneous Items

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

NOTE: Adding or Deleting items from a list modifies the Billing Plan, and as such you must re-assign the Billing Plan to the facilities that are using it.

Assigning Income Accounts

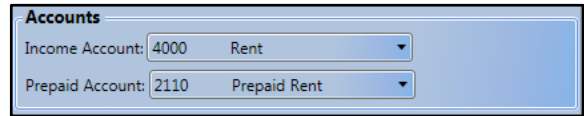
ESTABLISHING INCOME AND PREPAID ACCOUNTS

Once a **Billing Plan** has been created the last step is to assign the revenue generated from the **Billing Plan** to an account number from the chart of accounts. Once assigned, Storage Commander has reports detailing revenue with general ledger account numbers used by your corporate accounting system.

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

Income Account:

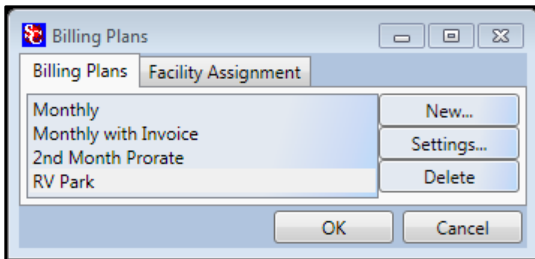
To assign rent payments to your income account, click on the down arrow in the Income Account field and select the account number you have setup for "Rent" or rental income.



Prepaid Account:

Click on the down arrow in the Prepaid Account field and select the account number you have setup for prepaid rent income. (*Prepaid rent is any rent payment that is entered into the system before rent is charged.*)

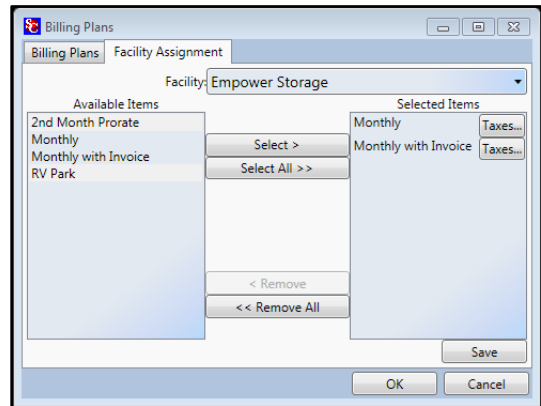
ASSIGNING BILLING PLANS TO A FACILITY



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

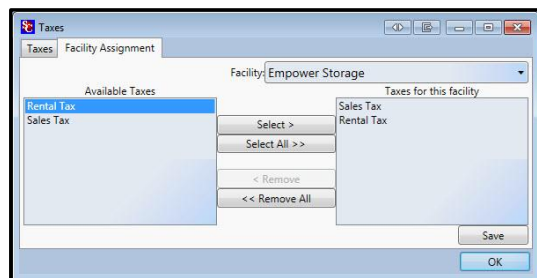
Click on the **Facility Assignment tab** to open the facility assignment window.

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



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

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



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

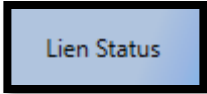
When all tax plans have been copied into the Taxes Applied box, click on the **OK** button to copy, and save the tax plan(s) into the billing plan.

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

Creating Late Groups

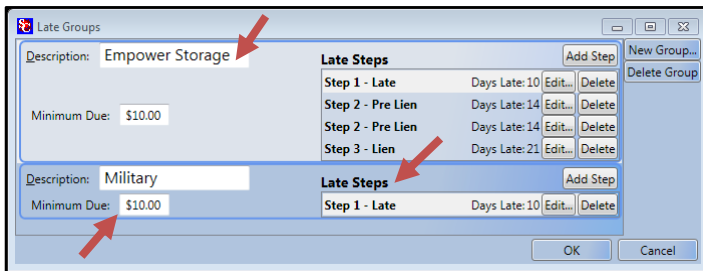
Late groups contain the configuration you use to move a customer through the late processes and ultimately to auction. In this configuration you will establish when late steps are posted to a customer's unit, fees to be charged, what notice will be generated, and limit access to the customer's storage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

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



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

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



Clicking on the **New Group** button will create a new late group with a default name of "**Late Group**" in the *Description* field. A Late Step named "**Step 1 - Late**" will also be created.

In this illustration I renamed the description from "**Late Group**" to "**Military**" by clicking in the description field, deleting the default name (Late

Group) and entering the new name (**Military**).

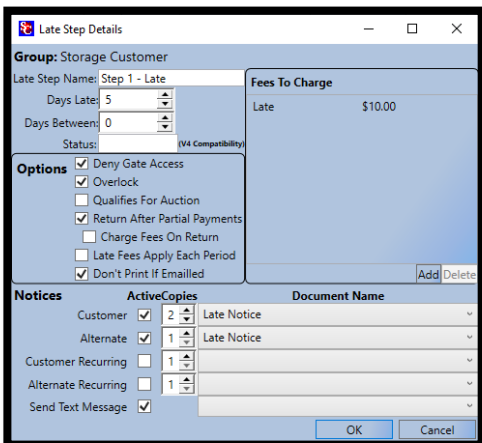
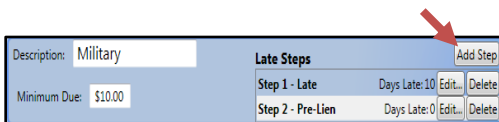
Now enter the Minimum Due amount that will required to be placed into any late step. Entering a value for minimum due will cause Storage Commander to evaluate a customer who may qualify to be placed into a late step based on the number of days late *and* have a minimum amount due on their unit.

NOTE: If a value of \$0.00 is used as the minimum due, customers will be placed into late steps based solely on the number of days late.

Configuring a Late Step

ADDING A LATE STEP

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



Late Step Name:

Enter the name that will be used to identify the late step within the notices and reports.

Days Late:

Enter the number of days from the *day rent was charged*. This number will determine when a customer will be assigned to this late step.

Days Between

Enter the number of days between this late step and the previous late step

Status

Only used in older versions (V4) of Storage Commander.

Options	
<input checked="" type="checkbox"/>	Deny Gate Access
<input checked="" type="checkbox"/>	Overlock
<input type="checkbox"/>	Qualifies For Auction
<input checked="" type="checkbox"/>	Return After Partial Payments
<input type="checkbox"/>	Charge Fees On Return
<input type="checkbox"/>	Late Fees Apply Each Period
<input checked="" type="checkbox"/>	Don't Print If Emailed

OPTIONS

Deny Gate Access

Disables customers gate code when placed into this late step.

Overlock

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

Qualifies for Auction

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

Return After Partial Payment

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

Late Fee Applies Each Period

It is recommended that this option be enabled on the first late step that is associated with a late fee. What this option does is allow Storage Commander to re-apply the associated late step to a unit each month that the unit is late.

An example: A unit is charged rent on May 1st because no payment had been received, the unit moves into the first late step(Step 1 – Late) on May 10th, again no payment is received so the unit moves into the next late step (Step 2 – Pre-Lien) on the pre assigned 18th day (May 18th), once again no rent is received, so on June 10th the unit is again *charged* the Step 1 – Late fee but remains in the Step 2 Pre-Lien late step and will continue through all other late steps according to their assignment in the late group, with the Step 1 fee being charged on the 10th of each month.

Don't Print If Emailed

Restricts printing of late notices if they were emailed.

EDITING A LATE STEP

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

Description: Military	Late Steps	Add Step
Minimum Due: \$10.00	Step 1 - Late	Days Late:10 Edit... Delete

DELETING A LATE STEP

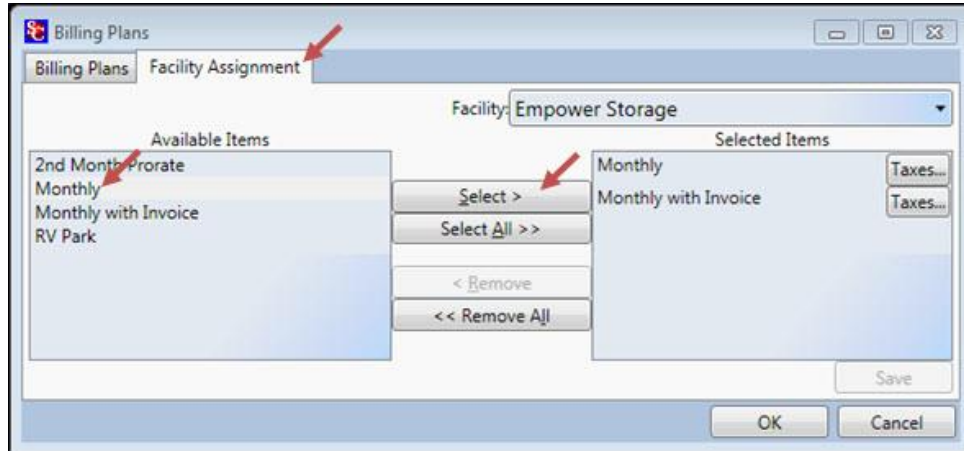
To delete an existing late step, click on the **Delete** button of the late step to be deleted and click on the OK button to save the changes and return to the Late Group window.

Description: Military	Late Steps	Add Step
Minimum Due: \$10.00	Step 1 - Late	Days Late:10 Edit... Delete

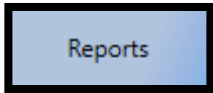
Note: Any modifications made to a Late Step within a Late Group which has been assigned to a billing plan will affect all customers who have been assigned to the Late Group.

Assigning A Late Group to A Facility

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

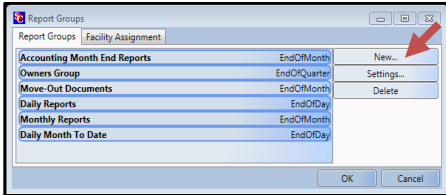


Report Groups



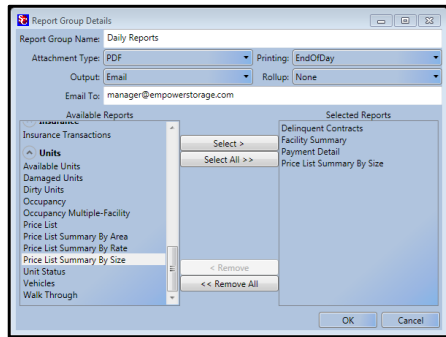
Report Groups give the ability to create customized clusters of reports that can be configured to automatically be printed, emailed, or printed and emailed covering specific periods of time. There are no restrictions on how many report groups that can be assigned to a facility.

CREATING A REPORT GROUP



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

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



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

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

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

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

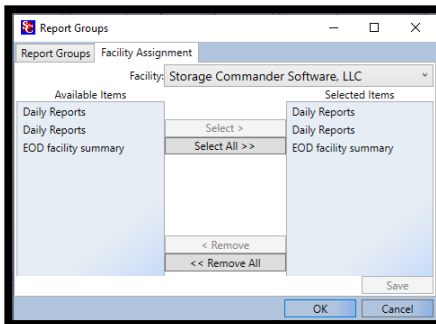
Rollup allows reports to show daily activity on a month to date bases or on a year-to-date basis.

In the **Email To:** field, enter the email address to be used when emailing a report group. To enter multiple email addresses please use a semicolon to add additional. For example: support@storagecommander.com; sales@storagecommander.com

Selecting Reports

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

Assigning Reports to A Facility

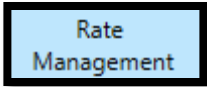


In the Facility field click on the drop-down arrow to see a list of available facilities. Select the facility that you will be assigning this **Report Group** to. The selected facility should now be listed in the **Facilities** field.

In the Available Items box click the **Report Group** to be assigned to the facility listed in the Facilities field.

Click on the **Select** button to copy the **Report Group** into the **Selected Items** list box. Click on the **Save** button

Rate Management



The Rate Management system used in Storage Commander is an extremely powerful tool/feature that can automatically control the rental rates (street rates) of a facility(s) based on multiple "Trigger Points" that are defined by a user. When units meet any one of these Trigger Points the rate for the associated units are changed to meet the pre-defined rate.

RATE MANAGER TRIGGER POINTS

The associated Rate Management Trigger Points are defined as follows:

Size.....Change rate based on *unit/space size*.

Percentage.....Change rate based on the *percentage* of units rented of the **Size** selected.

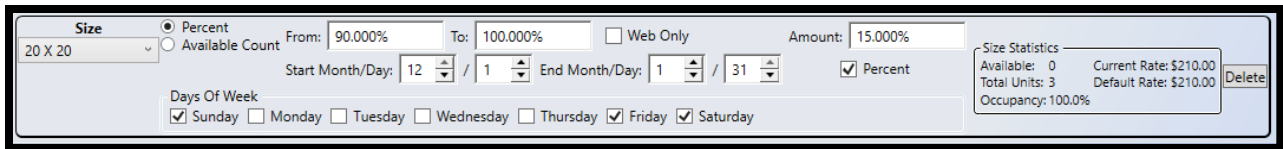
Available Count.....Change rate based on the number of *Available units* of the Size selected.

Start/End Month-Day...Change rate based on the Size selected within a *date range*.

Day of Week.....Change rate based on *specific Day(s) of the week* or specific days(s) of the week within a specified date range.

CREATING A RATE MANAGEMENT ITEM

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



Once you have selected the facility click on the **New Item** button to open a new **Rate Management** item.

Configure the **Rate Management** item using the trigger points listed above. Click on the **Save Changes** button to save the new rate management item to load it to the facility.

Active Rate Management Items.

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

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

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

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

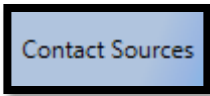
In the above example, a rate management item is being configured to increase the rental rate on 20 X 20 units by **15%** when the occupancy reaches **90%**. This increase will only take effect in **December** and **January** and is limited to occurring on **Friday's, Saturday's & Sunday's** within the defined months.

The rate on the 20 X 20 units will return to the normal street rate when any of the trigger points are not met.

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

Marketing Data

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



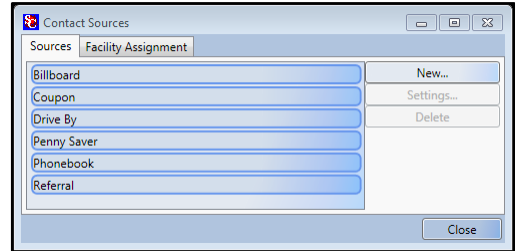
CONTACT SOURCE

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

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

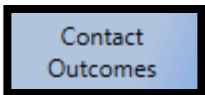
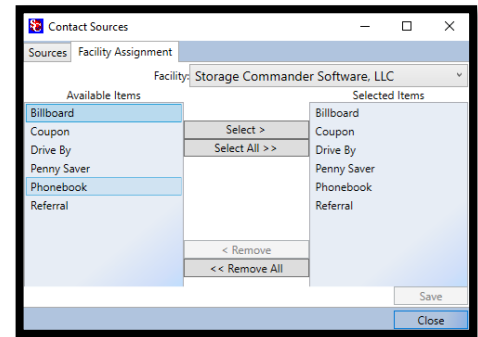
To **change** the name of a current marketing source, click on the marketing source to be changed followed by clicking on the Settings button. Delete the current name and enter the new name, click on the OK button to save the changes, and return to the Contact Sources window. The new name should now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

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



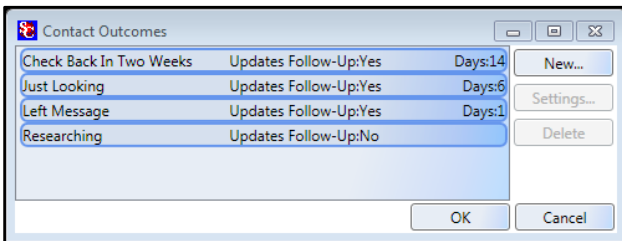
ASSIGNING CONTACT SOURCES TO A FACILITY

On the **Facility Assignment** tab, click on the Facility field drop-down arrow to see a list of available facilities. Select the facility that you will be assigning the **Contact Source** to. The selected facility should now be listed in the **Facilities** field.

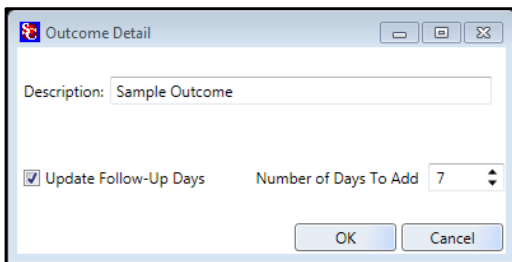


CONTACT OUTCOMES

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



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



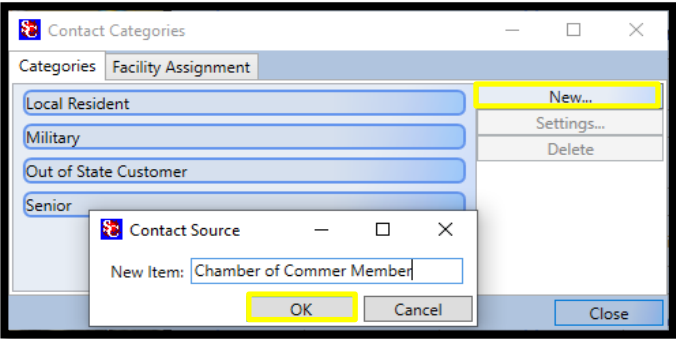
To create a new **Contact Outcome** item, click on the **New** button in the **Contact Outcome** window, this will open the **Action Detail** window. Enter the description / name of the contact action item. To assign a follow-up schedule to this action item select Update Follow-Up Days and enter the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

NOTE: New Contact Outcome groups that have been edited, are automatically updated to all facilities utilizing Storage Commander.

Contact Categories

CONTACT CATEGORIES

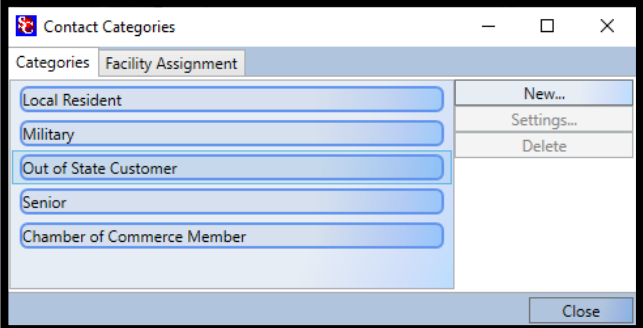
Contact Categories allow you to create categories (such as Military, Senior Citizen, Government) and assign potential customers to a specific category. This information will be broken down in the **Contact Reports** and on the **Charts / Gauges** screen.



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

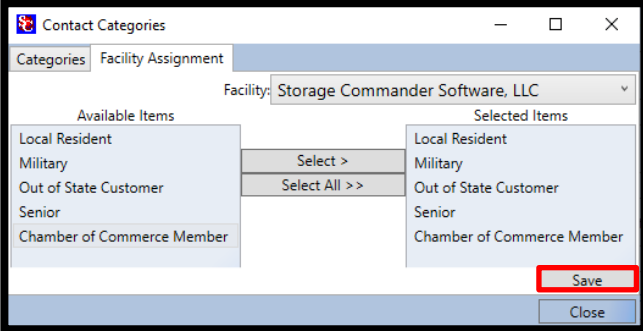
ASSIGNING CONTACT CATEGORIES TO A FACILITY

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



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

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



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

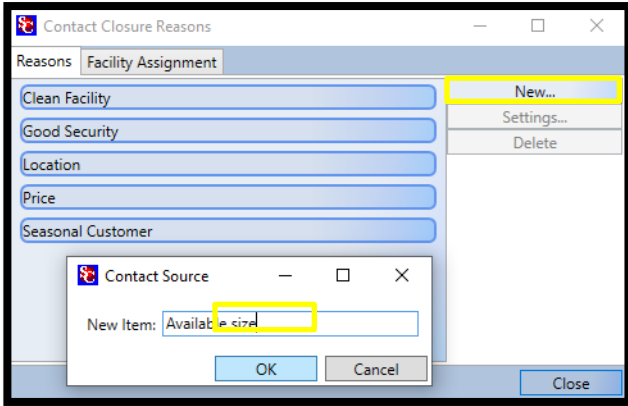
This **Contact Category** item will now be available in the selected facility during a **Move-In** on the Billing Detail's window / Reason for Renting.

Contact Closure Reasons

CONTACT CLOSURE REASONS

Contact Closures will allow you to track customers by their rental decision.

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

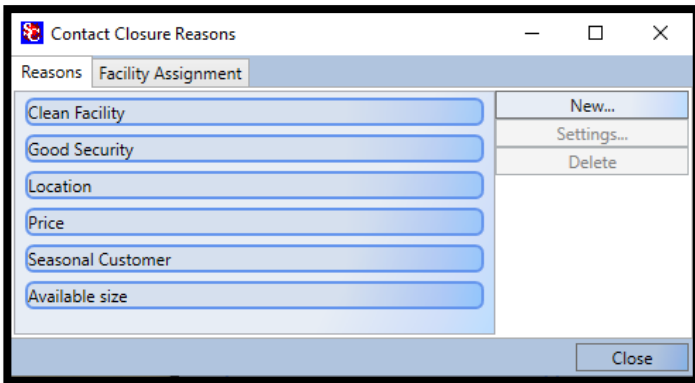


CREATING A NEW CONTACT CLOSURE REASON

To create a new rental decision category, select **CONTACT CLOSURE REASONS** from the **Marketing Data** section of the Configuration Manager.

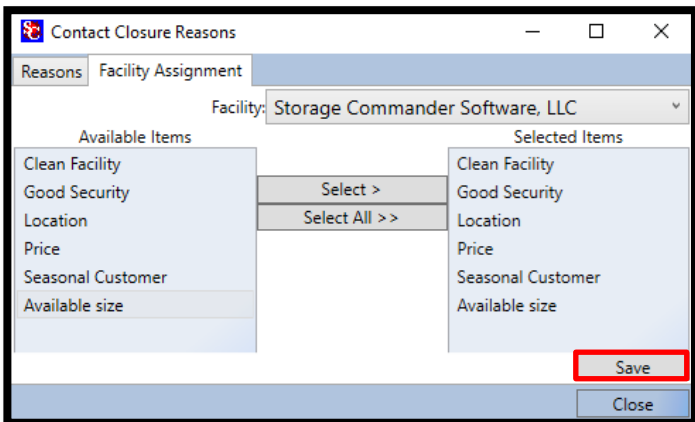
Click on the New button and enter a name for the new rental decision, click on the OK button to save and display the new entry in the list box.

ASSIGNING CONTACT CLOSURE REASON TO A FACILITY



To assign **Contact Closure Reasons** or to edit existing, click on the **Contact Closure Reasons** button located under the **Marketing Data** section and click on the **Facility Assignment** tab to open the facility assignment window.

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



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

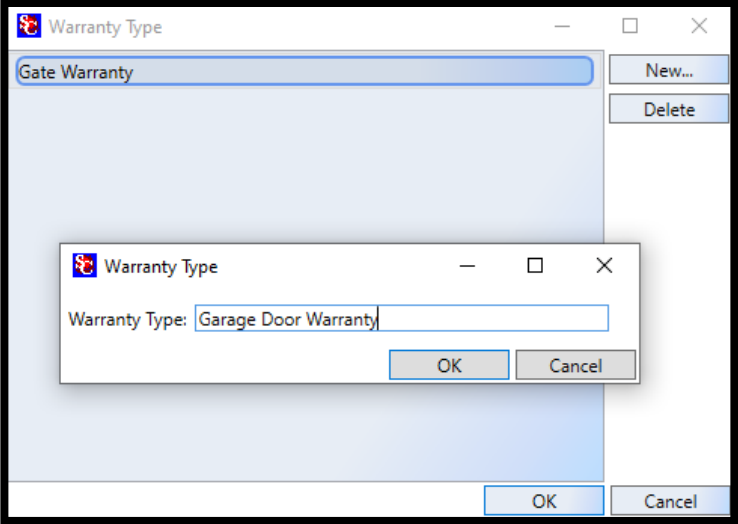
Click on the **Select** button to copy the contact category into the **Selected Items** list box. Click on the **Save** button.

This **Contact Closure Reason** will now be available within the **Contact List** of the **Quick View** in the Storage Commander program.

Work Order
Warranty Types

Misc. Items

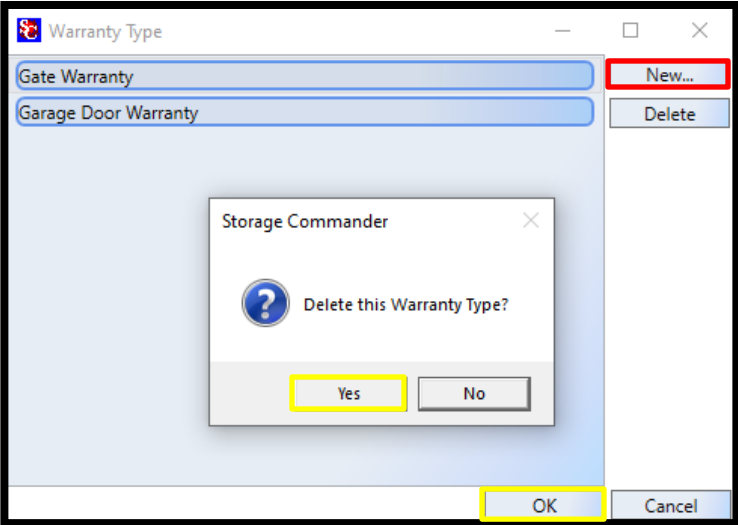
The Miscellaneous Items section of the Configuration Manager is where you setup and configure the **Warranty Types for Work Orders** in the Storage Commander program on the work orders tab.



CREATING A NEW WARRANTY TYPE

To create a new warranty type, select **WORK ORDER WARRANTY TYPES** from the **Misc. Items** section of the Configuration Manager. Click on the New button and enter a name for the new warranty type, click on the OK button to save and display the new entry in the list box.

NOTE: New Warranty Types that have been created, are automatically updated to all facilities utilizing Storage Commander.



DELETING A WARRANTY TYPE

To delete a warranty type, select **WORK ORDER WARRANTY TYPES** from the **Misc. Items** section of the Configuration Manager. Click on the Delete button and Select Yes. Click on the OK button to save the changes.

General Support Information

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

Technical Support for Storage Commander:

Technical Support: 951-301-1187

Fax: 877-600-8412

Digital Fax: 951-813-2548

Email: support@storagecommander.com

Website: www.storagecommander.com/support

Sales for Storage Commander:

Front Office: 951-672-6257

Toll Free: 877-672-6257

Fax: 951-600-8412

Digital Fax: 951-813-2548

Email: sales@storagecommander.com

Website: www.storagecommander.com

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