



StorMan Software

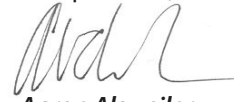
Quickstart Guide

Introduction & Welcome

Welcome to the StorMan family and this Quickstart Guide for new users. This guide will answer some important questions to help you get the best from our highly experienced software development company and its vast network of contacts.

We aim to make your introduction to StorMan as pleasant and informative as possible. Thank you for opting to consider the StorMan family of management software solutions.

Compliments,



Aaron Alsweiler
General Manager

Installing StorMan

In most cases, the StorMan installation program is downloaded from our website and installed onto your computer like a normal software program. As we often release new updates, the link to the latest version of our program changes from time to time. To ensure you are installing the most recent version, please get in touch with your nearest StorMan sales office and request the installation link for the latest version.

Once you have downloaded our installation program for your Mac or PC, simply run the installation program and follow the on-screen prompts to install the software (we highly recommend using all of the default options - including the software installation path).

If you would prefer not to get involved with the installation procedure, you are more than welcome to have your IT technician contact our technical support team, and we can provide them with the relevant installation instructions.

In some cases, a web install (where we remotely install the software on to your computer) may also be available - please contact your local StorMan sales office for more information.

The StorMan Datafile

The StorMan Datafile is the key to your business. If there is one file you need to backup and keep, this is it. It is the core of your business - it contains all of your customer & agreement data, transaction history, unit information and billing data. While we can teach you how to do them, it is **your responsibility** to do your backups and ensure that they are working.

Without this file, the StorMan program is merely a shell with nothing inside. Therefore, it is very important that you backup this file every day. It is also important to take a copy of your datafile off site from time to time - that way, if there is ever a fire, flood, theft or other disaster at your premises, you still have a datafile to go back to once life returns to normal. Again, without this file, your StorMan program is just an empty shell with no customer or company data.

For information on performing a backup, please refer to the following article:
<http://my.storman.com/support/knowledgebase/backups/>

Using your Datafile

Once you have installed StorMan, you will need to instruct it to use the datafile that we have created for you as part of the setup process.

We will generally telephone you in order to expedite this process on your behalf (once we've emailed your brand new, custom-made datafile to you). However, it is possible to do this yourself if you wish. This is achieved by placing your datafile (and its related Log and Resource Files) into the "Data-base" folder, in the location where StorMan was installed.

When you start StorMan for the first time, you will be asked if you wish to create a new demo datafile, or use an existing file (as per screenshot to the right).

You would select the option to use an existing datafile (being the custom datafile that we have created for you). Again, you are more than welcome to ask us to do this for you.



Logging In

In most cases your datafile will have been set up with security enabled. As a result, when you open StorMan and your datafile has loaded, you will be asked to login. Please login using one of the usernames and passwords that you specified on the New Site Details Form you completed when you ordered StorMan (we used this form to create your datafile).

If you did not specify a username and password, the default logins will have generally be used instead. The default login for an owner is **admin**, with a password of **storman**. The default login for a manager is **manager**, with a password of **manager**. If your datafile is using default logins, we would strongly recommend changing them via the *Maintenance > Change Password* menu in StorMan.

Understanding the Basics

StorMan's management software is designed around your customers. That is, the customers are the key element in our database's design. It is the customer who can rent & purchase many items from you, and it is the customer who can have multiple rental items, on multiple rental agreements within the one system (as outlined in the diagram below)...



Once this core concept is understood it is easy to realise that StorMan allows a customer (for example, Rob Fitifiti) to have multiple Agreements with you (for example, Agreement Numbers 00045 and 00100). Furthermore, StorMan will also allow this customer to have multiple units per Agreement (for example, unit B2 on Agreement 00045 and units A7 & D36 on Agreement 0100).

The next step is understanding the concept of how a customer flows through the StorMan system. This is illustrated in the diagram below...



The process essentially begins when a prospective customer makes an enquiry - known in StorMan as a Sales Enquiry*. At this stage, you would record their details & provide a quote (or several) for any rentable (eg. units) or purchasable (eg. merchandise / stock) items.

StorMan will remind you to follow them up the following day. If successful, the customer is converted to a Reservation and eventually a Move In (known in StorMan as an Agreement). Whilst on an Agreement, the customer will automatically be billed as per the set billing cycle (eg. Monthly, Weekly, etc). During this time, you can also invoice the customer for merchandise purchases & other add-on services. Eventually, when they no longer require your services, the customer will Move out.

To learn more about the basics, please refer to the following article:

<http://my.storman.com/support/knowledgebase/introductionfundamentals/>

* Sales Enquiries are not available in our entry-level Lite product.

Tasks you should Perform Daily

The following is a suggested method for using StorMan on a daily basis...

- ➔ *Print a Vacant Unit listing (Reports menu > Vacant Unit Report).*
- ➔ *Check Gate log for unusual activity (sites with gate system only).*
- ➔ *Check the Calendar Notes section.*
- ➔ *Print Reservations, if any and enter any payments received.*
- ➔ *Run Daily Processing; Print your notices & bill customer's rent, and then any recurring charges. Daily processing will activate other functions in the program; an example of this is the Sales follow ups due for the day which will pop up after Daily processing has been completed. Check the Over Lock report.*
- ➔ *Follow up on past enquiries (this is an essential part of the three step process to increase your let rate).*
- ➔ *Print a list of Overdues and follow up.*
- ➔ *Enter telephone Sales inquiries into StorMan (do this every day).*
- ➔ *Process Move In's & Move Out's as they occur during the day.*
- ➔ *Apply any payments to the customer's accounts as you receive them. Issue tax receipts and invoices as needed.*
- ➔ *Around site closing time, run the banking report.*
- ➔ *Back up database (Mandatory for Technical Support).*

Extend your Knowledge

It is easy to learn more about StorMan and expand your knowledge of this very powerful software package...

- ➔ Learn the basics to get you started by watching one of our free 'Introduction to StorMan' movies. Download a copy for either StorMan Lite or StorMan Pro via our website, at <http://go.storman.com/recordedsessions>
- ➔ If you purchased an Advantage or Corporate support & upgrades plan with your software, be sure to sign up for our free 'Weekly TechTips'. Contact your local sales office for details.
- ➔ Sign-up for our free Monthly eNews - packed full of useful information, industry links, the latest StorMan news and exclusive sneak-peaks on upcoming features & updates. Subscribe via www.storman.com/newsblogs/enews.php
- ➔ Join in on one of our free PowerSessions. StorMan PowerSessions are short and sharp online webcasts (20 minutes maximum) designed to show you how to use a StorMan feature, and then let you get back to your day. To view our list of upcoming PowerSessions, keep an eye on <http://go.storman.com/livesessions> or view recordings from past sessions via <http://go.storman.com/recordedsessions>
- ➔ Attend one of our training courses and become a Certified StorMan Operator. We can train you online, you can come to us, or we can come to you - you'll even learn some great industry tips & tricks. Find out more about our different types of training on our website, at www.storman.com/trainingevents/options.php
- ➔ Become a member of the National and/or your local Self Storage Association, and attend industry events. Visit the SSA online at www.selfstorage.org/SSA or the CSSA via www.cssaweb.com
- ➔ Be sure to frequently visit myStorMan - our Client Support & Services Portal for StorMan users. It provides access to our changelog, details on our current network / email / phone-system status and an archive of training videos & PowerSession recordings. You'll also find our weekly techtips, online forms, the myStorMan store, a list of useful links and our massive searchable technical support knowledgebase – with hundreds of articles, movies, screenshots and how-to guides on just about every StorMan topic! To log on to myStorMan, visit <http://my.storman.com> (you will need your 5-digit site-code & website password to access myStorMan. Contact your nearest sales office if you are unsure of these details).
- ➔ Keep up to date by reading our staff blogs, at www.storman.com/newsblogs/

Getting Assistance

If you have questions or need Technical Support, please get in touch with your nearest StorMan office. A few things to keep in mind...

- ➔ Full contact information can be found on our website, at www.storman.com/contact/
- ➔ Ensure you write your 5-digit site-code & website password on a slip of paper and keep it near your computer, in case you need to contact Technical Support or access myStorMan (<http://my.storman.com>). While your 5-digit site-code is displayed inside your StorMan program, it is of no use to you if your computer will not boot, or StorMan will not start. If you received this Quickstart Guide as part of a Welcome Pack, we will have also included a handy desktop card with your unique 5-digit site-code written on it.
- ➔ Technical Support and Upgrades are only available to businesses with a valid & paid-up StorMan Support Plan (either Standard, Advantage or Corporate). Please contact your nearest office if you need to check payment, expiry and renewal details. You can also renew your support & upgrades plan online, at the myStorMan Store (<http://my.storman.com>).
- ➔ Not all Technical Support and Upgrade plans provide telephone-based support. However, priority telephone support is available to businesses on any paid-up support plan in site-down emergency situations. A site-down emergency situation is when you are unable to open or start your StorMan datafile. The site-down emergency phone service is not to be used for issues that are not classified as site-down emergency issues.
- ➔ If our offices are closed at a time when you require technical support assistance, 24-hour self-help is available via the myStorMan technical support knowledgebase, at <http://my.storman.com>. Please note that you will need your 5-digit site-code and website password to access myStorMan, so again, ensure you write this information down near your computer (or keep it in the safe) so that you can access myStorMan even if your StorMan program will not launch. You may also like to write this information down on the next page of this booklet (a notes page).