AGF Mini Storage Program

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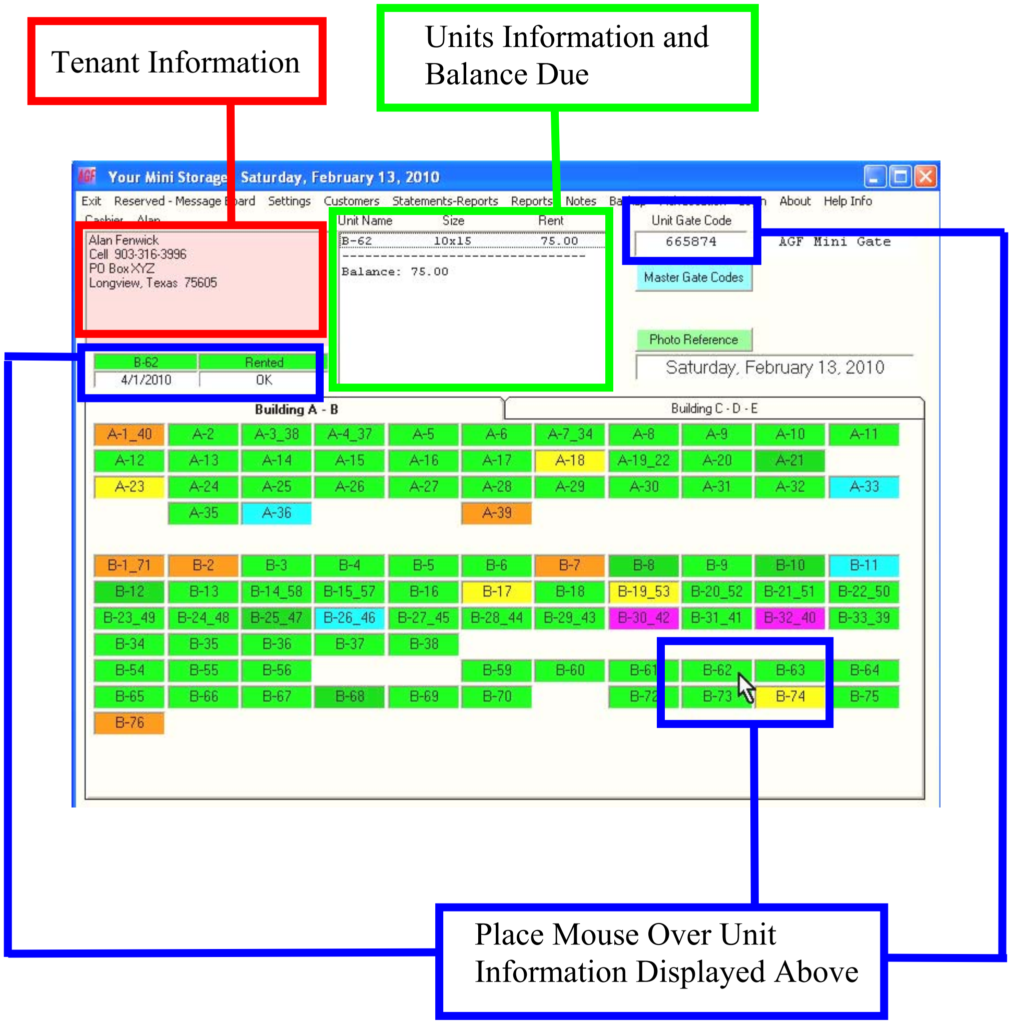
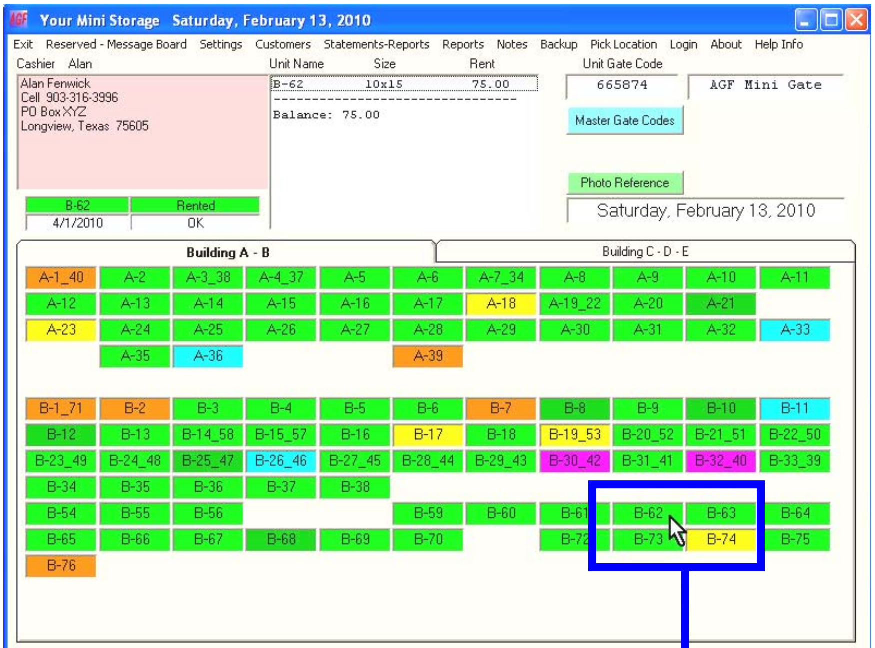
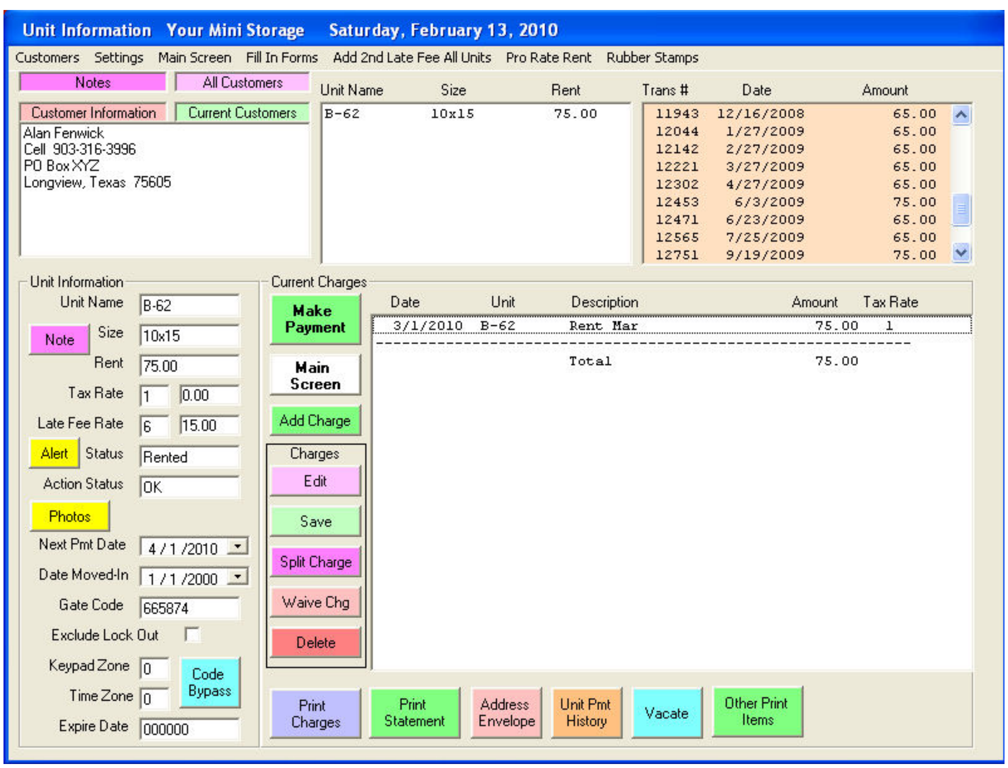


Tenant Information
Units Information and Balance Due
Your Mini Storage Saturday, February 13, 2010
Exit Reserved - Message Board Settings Customers Statements-Reports Reports Notes About Help Info
Alan Fenwick
Cell 903-316-3996
PO Box XYZ
Longview, Texas 75605
Unit Name Size Rent
B-62 10x15 75.00
Balance: 75.00
Unit Gate Code
665874
AGF Mini Gate
Master Gate Codes
Photo Reference
Saturday, February 13, 2010
B-62 Rented
4/1/2010 OK
Building A - B
Building C - D - E
Place Mouse Over Unit Information Displayed Above



Click on Unit to View Unit Information Screen

Unit Information Screen Where Many Things Can Be Done.
Take Payments, View Payments Made, Add Photos, Post Notes, Set Alerts, etc…



Unit Information screen

Things you can do here.

View all Units a Tenant has

<u>Make Payment</u> and print a receipt - has option not to print if like

View past payments and print if needed

Work with all Units a Tenant has

Set an **<u>Alert</u>** Message like… "Need Phone#, etc."

Post a **<u>Note</u>** – like… Customer called, we called customer, problem with .., etc.

View **<u>Photos</u>**

Add Photos like - Driver Lic ID, pictures of things stored outside, action like remove lock, etc.

Set **<u>Status</u>** to Lock Out, Rented, etc.

Change **<u>Gate Code</u>** – set gate settings for tenant

<u>Vacate</u> Tenant from a Unit

Adjust Rent Amount
Adjust Late Fee Amount
Adjust Next Pmt Date
Adjust Move-In Date

<u>Print Charges</u> - current charges due
<u>Print Statement</u>
<u>Address Envelope</u> – can edit before printing – add lines – add message if like at bottom area of envelope.
Print Previous Payment

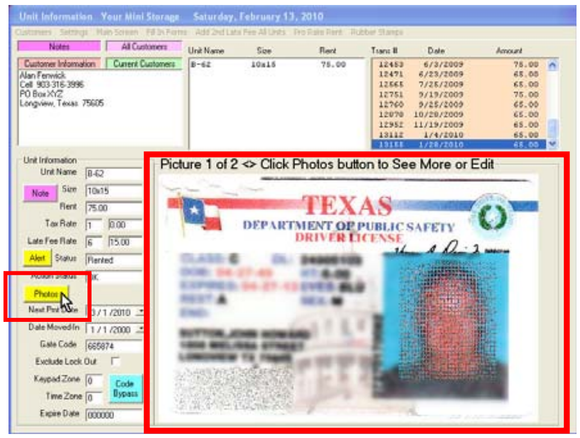
Add Charges – rent, deposit, late fees, etc
Edit Charges – change amount, description, etc.
Waive a Charge – cancels out charge with negative charge shows in record for your and their information
Split a Charge – for making partial payment
Delete Charges

Check Pro Rated Rent –Menu **<u>Pro Rate Rent</u>**

Add Charge Items for look up list – Menu **<u>Settings</u>**

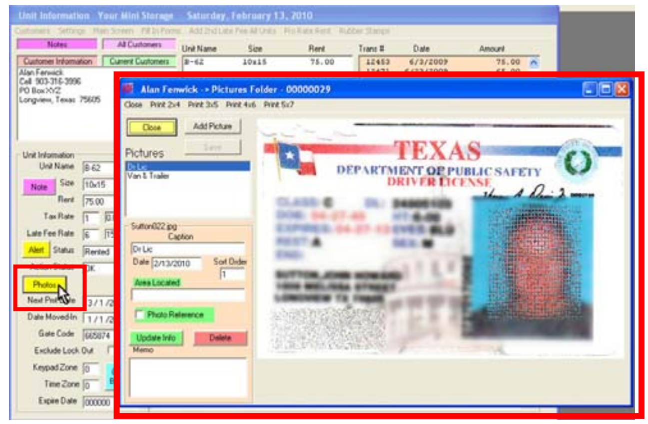
From here you can

- Go to Print a Contract or custom letter or message like… account delinquent, etc.
- Go to Customer Information Screen to update information
- Go to Current Customer List
- Go to All Customers List

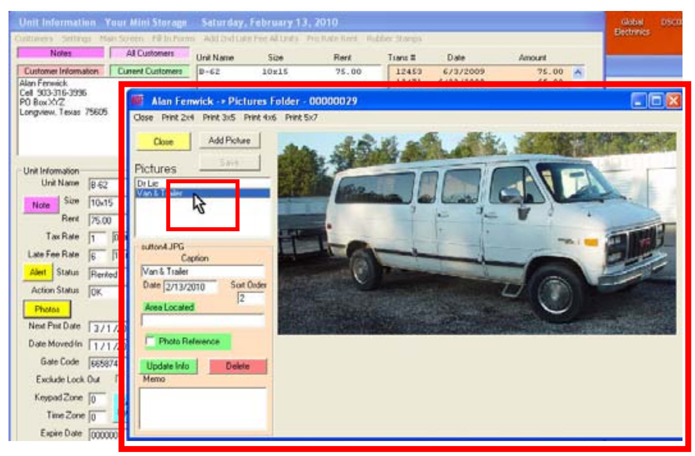


Place Mouse Over Photo button Picture is Displayed

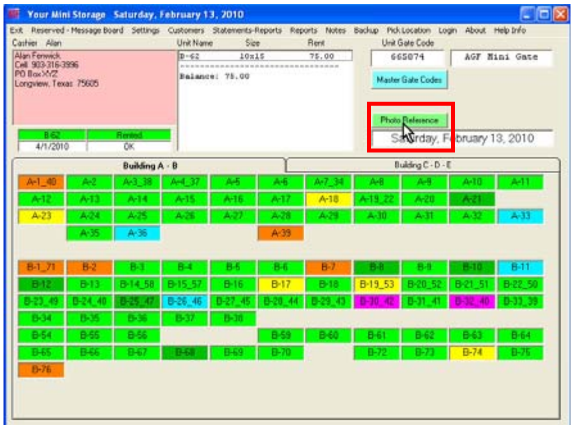
Leave Mouse Over Photo button Pictures Displayed Rotate one to another



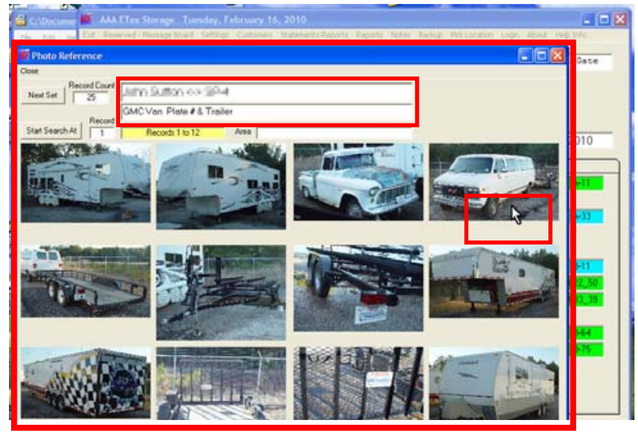
Click **Photo** button Edit Screen Comes Up



Select Pictures in List



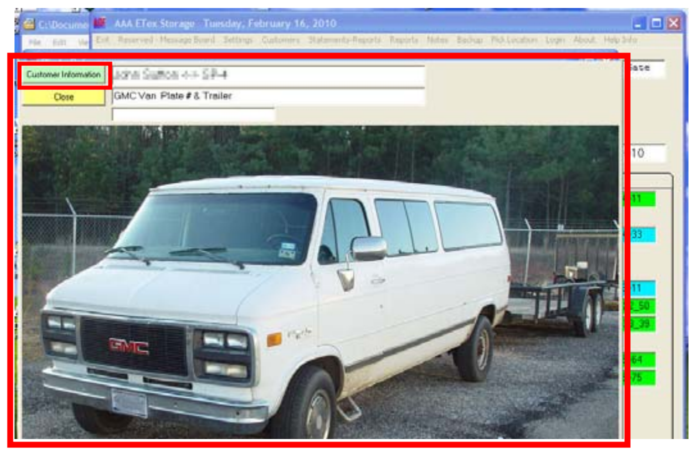
Click **<u>Photo Reference</u>** button



Mouse over picture shows details

Click Picture for Larger Picture

Click **<u>Customer Information</u>** button to go to the Customer Information screen



AGF Mini Storage

Main Screen Menus

- **Exit** –exit program
- **Reserved – Message Board**
  - **Reserved** – Shows you the units that the status is set to reserved.
  - **Message Board** - Lets you post messages that come up every time program starts and when you click the menu <u>**Reserved – Message Board**</u>
- **Settings**
  - **Sizes and Rents**
    - Shows how units are set up, count of each size and amount rent set at
    - Total count of units - Total Rents
    - Update rent and size information – change – Size description
    - See what each unit's rent set at
  - **Company Info**
    - Company Information – Name, Address, Phone etc.
      - Add Other Locations – manage more than one facility
    - Moneys – late fees, days late, Deposit, Admin Fee
    - Customize Screen – number of Tabs and Captions
    - Gate Information
    - Printers to use - receipts, statements, reports, etc.
  - **Adjust Locations**
    - Move Unit location on the screen – click of mouse
    - Create Units
    - Delete Units

- **Customers** – list of all Current and Past Customers –View their information

- **Statements** – Current Customer List – Indicates if to receive a statement
  - Easily remove or add back to list of Customers to receive a statement
  - Group button - Groups those that are to receive a statement 40 customers to each group – message indicates the start and end group numbers
    - Like 2 to 5 – this means there is a group 2, 3, 4 of 40 customers each and the Last group in this case 5 will be from 1 to 40 customers - the remainder.
  - <u>Printing Options</u> button – List is hidden of Customers Names
    - Printing invoices is made available
    - <u>Check Paid Ahead</u> button - Gives options to view the customers that are paid ahead
    - <u>Statement List</u> button Show the Customers Names again
    - <u>Print Invoice</u> button – after entering a <u>Group To Print</u> Number use to print full-page statements for the customers.

Main Screen Menus continued

- **Reports**
    - **Available Units For Rent**
        - Units Available- List Available Units- Complete list too
            - Also Percent Occupied/Percent Vacant
        - Stats on Units – Quantity of each Size – money for that size - Totals
        - What if Stats – What if Add or Remove Units or What if Change Rates
    - **Payment History**
        - Payments received for future months
        - Payments for any date range 1 day to 1 year
        - Filter Payments
            - Deposit – cash and checks
            - Cash
            - Check
            - Credit Card
        - Export in format for Spread Sheet (Excel)
        - Print Report
        - Print Report Summary
        -
    - **Current Charges**
        - Current Charges Due From Tenants
            - Sort by
                - Date
                - Unit
                - Customer
                - Description
                - Amount
            - Filter by Category
        - Deleted Current Charges - charges that have been delete from tenant's current charges list
    - **Current Charges Summary**
        - Tenant Name – Amount Due – Days Past Due – Unit Numbers
    - **Days Past Due**
        - Shows Days Past Due – Unit – Status – Amount – Name – last pmt and date
        - Print Custom Letters from here by status
        - Also Unit List w/status
    - **Unit Status**
        - Report for Status like – Rented, Past Due, Lock Out, etc.
    - **Unit Action Status**
        - Report for Action Status like – OK, Needs Cleaning, Water Leak, etc.
    - **Remove Lock List**
        - Shows list that were Delinquent now paid current - reminder to remove lock, etc.
    - **Move-In Move-Out List**
        - Unit Move-In and Move-Out List
    - **Current Tenant Count**
        - Number of Current Tenants Renting
    - **Alert Check**
        - List of all Alerts set – message pops up when looking at tenants information
    - **Date Status**- same as Days Past Due

Main Screen Menus continued

- **Expense Record**
  - Keep record of money spent and put in categories
  - Print reports
  - Filter Records

- **Notes** – check the notes for all the customers at once
  - When you are viewing the unit information you can quickly add a note
    - When you click <u>Add</u> button
      - Day and Time are Added
      - Customer Name is Added
      - His Unit(s) Name(s) are Add
      - And you are ready to type in a quick message to yourself
      - You can also create a List of Events
      - Customer Called, Moved Out, what ever you need and then add them to the note with a click of the mouse.

Enter a New Customer

Main Screen – Menu –Click Customers

- Click Add Customer button
- Type in Last Name
    - Note if name entered matches current name(s) a list of those that match is displayed.
    - If this is the customer them click them in the list
    - If not Click Blue Add Customer button on the right to continue

- Use the Up and Down Arrow Keys to move to the areas that you want to Enter Information for
    - Press Enter – Change or Enter New Information
        - Type in the Information
    - Press Enter to save changes

Move In Customer to Unit(s)

Go to the Customers Information Screen

- Click Move-In button
- A list of all the Vacant Units is Displayed
- Click on the Unit(s) you want in the list
    - The Date for the move in is below the Assign Unit button
        - Change date now if you like, can be changed later also
    - Click the Assign Unit button
    - That's it the Unit is Now Assigned to the Customer

- ## Move in Payment – Charges
- Click Unit Information button
- Click Add Charge button
    - On the left there are three buttons
        - Add Rent
        - Admin Fee
        - Deposit
    - Below is a list of Items that when clicked are added to the current charges
- If you charge an Admin Fee Click the Admin Fee button
- If you charge a Deposit Click the Deposit button
- The program will pro-rate the first Months rent for you
    - Click Add Rent button – if the move-in date is not the 1st you are asked "Add Pro Rated Rent to Current Charges?"
        - Select Yes – note: if No is selected a full months rent is added instead.
- If you are collecting rent for the next month
    - Click Add Rent button again the next months rent is added to the current charges
        - Note: Each time you Click Add Rent button the next month's rent is added to the current charges.
- If you are selling the customer a lock or something else at this time select it from the list at this time.

- ## Edit Current Charges Information
- You can edit items in the current charges list on the right
    - Click the Item in the list and Click the Edit button
        - Make changes
        - Click save when you are through making changes
            - Note: you can also split the Charge so you can take a partial payment if the amount received is not equal to the charges selected to pay.

Taking Payments

- Click Make Payment button
    - Note: if the current charges list is empty you are asked
        - "Add Rent to Current Charges?"
        - Select Yes and the Rent is added to the Current Charges
        - Now Click Make Payment button again to proceed.

    - The Payment Date is below the 3 payment Options – change the date if the payment was received on a different date
    - The Partial Payment button when clicked lets you select items in the current charges list to remove from this payment – they will be left in current charges after the payment is processed.
        - ***Note you can Click the Change Mind button anytime to cancel before you Click the Approve Payment button***
- Select from the three options
    - Cash
    - Check
    - Credit Card

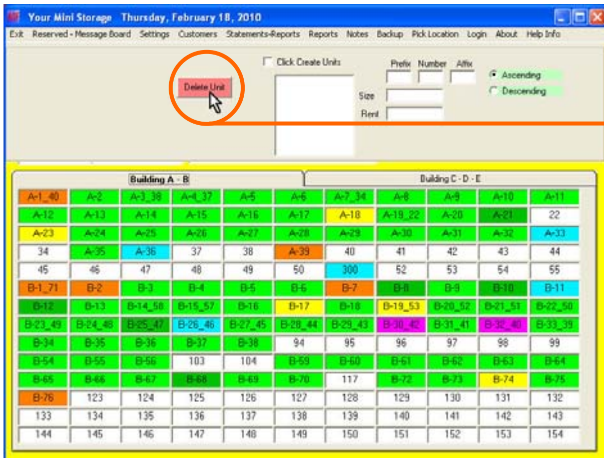
- Receipt Options
    - None – no receipt
    - Single – one receipt on sheet of paper
    - Double – two receipts on single sheet of paper, if need to keep copy, etc.

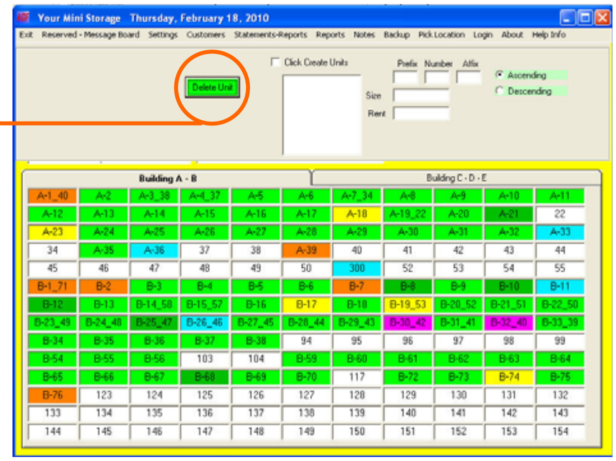
- Click the Approve Payment button
    - The Amount of what is Due is Displayed
        - Note: If you received an over payment because the customer did not know exactly what to send, you can enter what they sent and then when asked have the extra applied as a credit.

    - The Transaction information is added to the list on the top right of the screen - click on items in the list to see their details.
        - Note: you can **print** the information if you like

Adjust Locations – Main Menu – Settings

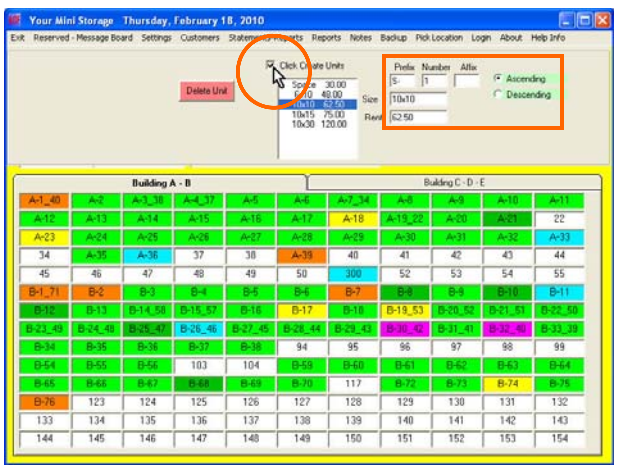
Delete a Unit click **<u>Delete Unit</u>** button – button changes green – click Unit and it will be deleted

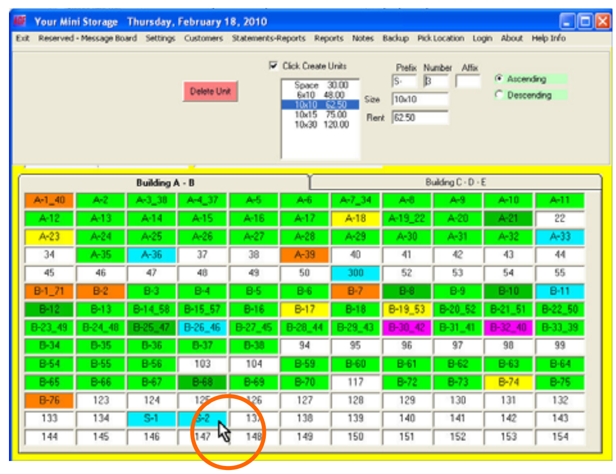




Create Units

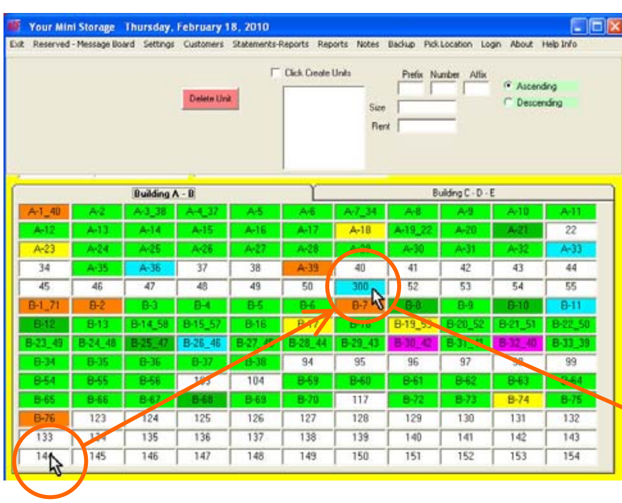
click **<u>Click Create Units</u>** box – Enter starting parameters – click where Units to be created at.

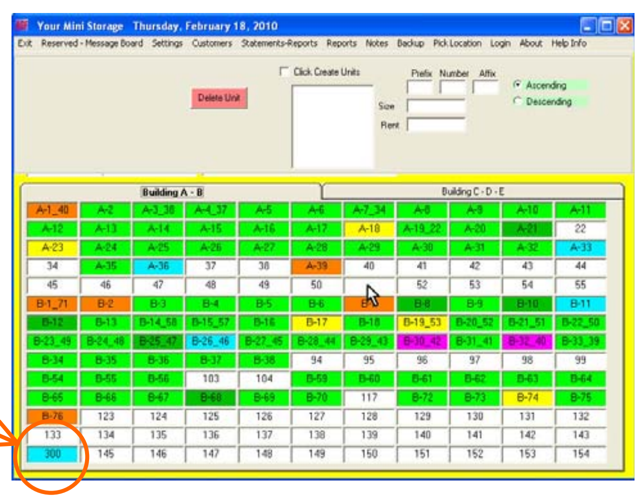




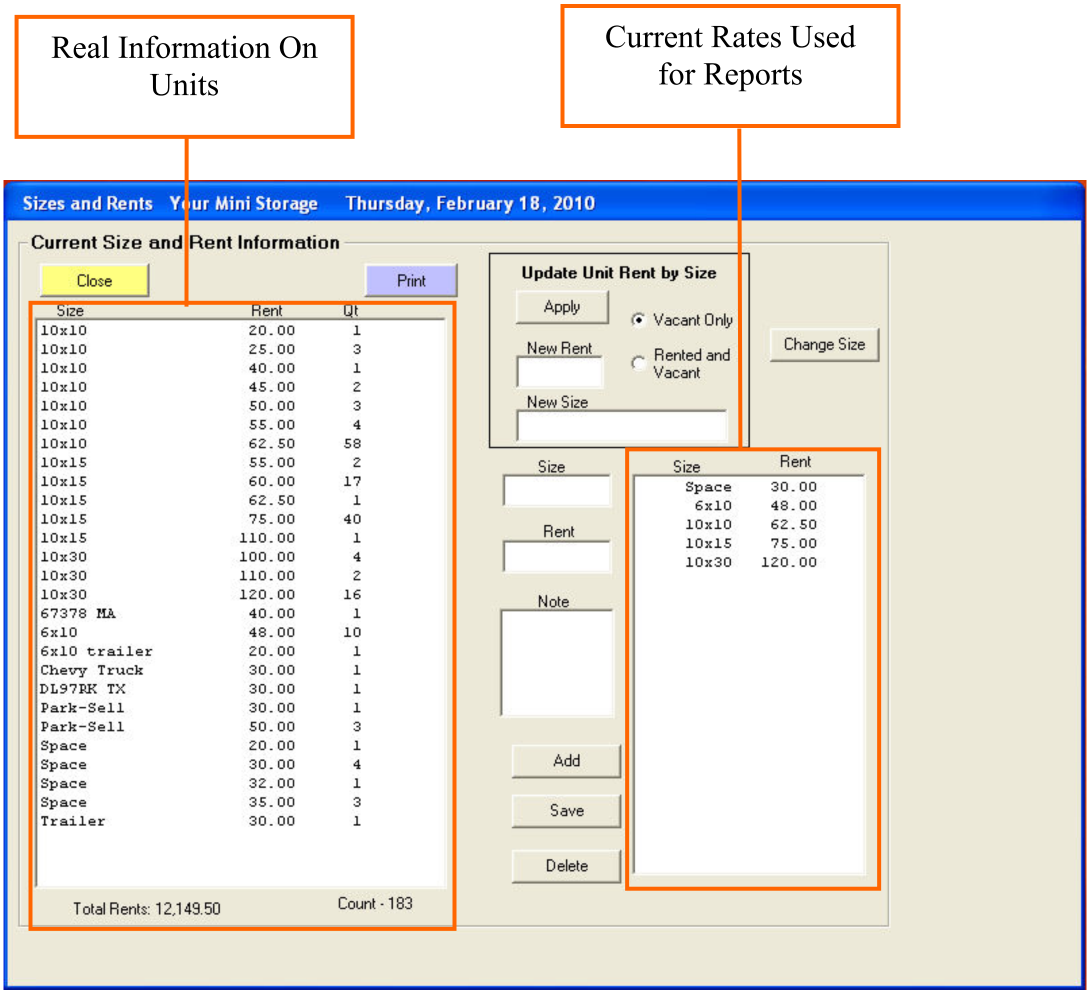
Adjust Location - Units

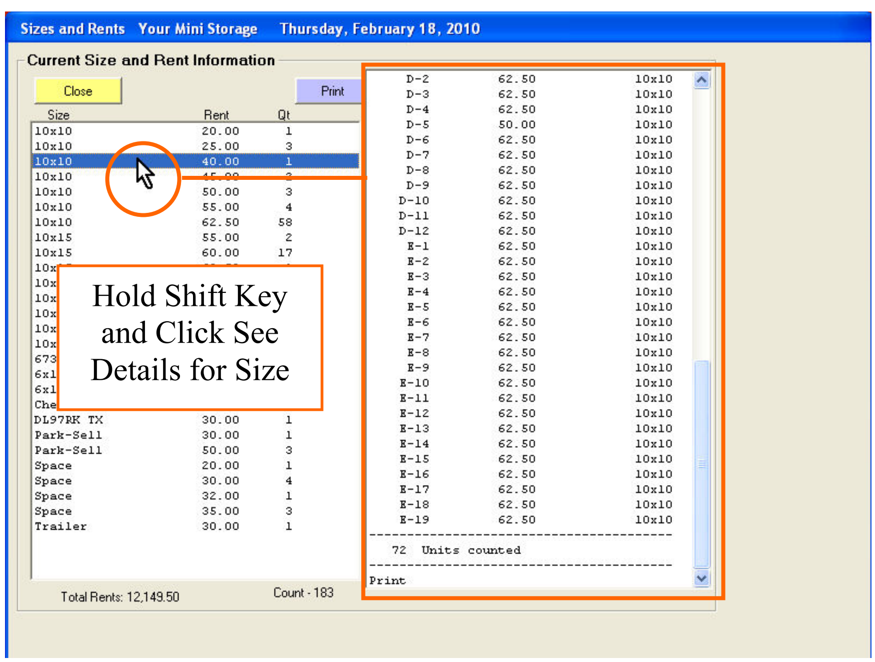
Move Unit – click empty space where to go – click Unit to move – Unit replaces empty space





Sizes and Rents – Main Menu - Settings





Setting up Units

After the program is first installed setting up the units is one of the first things need to be done.
The Main Screen has 1 Unit displayed and 10 tabs
Each tab can contain 154 units

To start you need to establish Tax Rate and Late Fees for your Units
Click on the Unit on the Screen
On the Menu Click Settings

- Click Tax Rates
  - If Rates tab is not selected click on it to select
- This is where you set up your Tax Rates that you charge
  - You can have as many rates as you like
    - One rate for like Rent (*if you charge tax on rent*) another for Items that you sell, etc.
- This is where you set up your Late Fees if you charge one
  - You can have as many Late Fees as you like

You need to decide on the Tax Rate # for your Unit Rent
You need to decide on the Late Fee # for your Units

Write down the Tax Rate # and Late Fee # that you want to start out with.

- Later you can adjust each unit separately for Rent Tax Rate, Unit Late Fees, Rent, Size, Etc.

On the Main Screen

- On the Menu Click Settings
  - Click Adjust Locations
    - The back color changes to Yellow and the location numbers are displayed
    - Click on the Tabs to see the other location numbers.

This is where you decide where you want to start location layout.

- Find the number that you want the first unit to begin at
- **Write down that Number**
  - **Note: the first unit 1 already exists you cannot use 1 for screen location to start at.**
  - **Or any location that a unit already exists; that is after you have already set some units up.**

- On the Menu Click Settings
  - Click Adjust Locations the Yellow is now Gone.

Click on the Unit on the Main Screen

- On the Menu Click Settings
  - Click Setup Units
    - On Menu Click Add Units
  - Prefix – this will be added in front of the number
  - Affix – this will be added after the number
  - Start Number – the number that you want to start with
  - End Number – the number you want to end with
  - Size – the size of the unit example “10x10”
  - Rent- Amount charged for rent
  - Screen Location – starting place for the first unit – **Number wrote down**
    - **Ascending** – direction moves right for each new unit created
    - **Descending** – direction moves left for each new unit created
  - Tax Rate # - tax rate for rent - **Number wrote down**
  - Late Fee # - late fee for unit - **Number wrote down**

Click Add Units button – new units are then added

Company Information

On the Main Screen

- On the Menu Click Settings
  - Click Company Info

Tabs

- Company Information
  - Company Name, Address, Phone, Etc.
  - Locations – Add and Select which to work with
- Money
  - Unit Deposit – if charge a deposit enter an amount
  - Admin Fee – if charge an admin fee enter an amount
  - Days past due – number of day before adding a late fee
  - Days late on invoice – number of days late that shows on invoice statement (*note: the days you actually add the charge can be different from what you show on the invoice*)

- Customize Screen
  - Number of Tabs on the Main Screen
    - Titles for the tabs that are displayed
- Gate Information
  - Set gate information for updating a gate system
- Set Printers
  - Set printer for different operations, contracts, reports, etc.