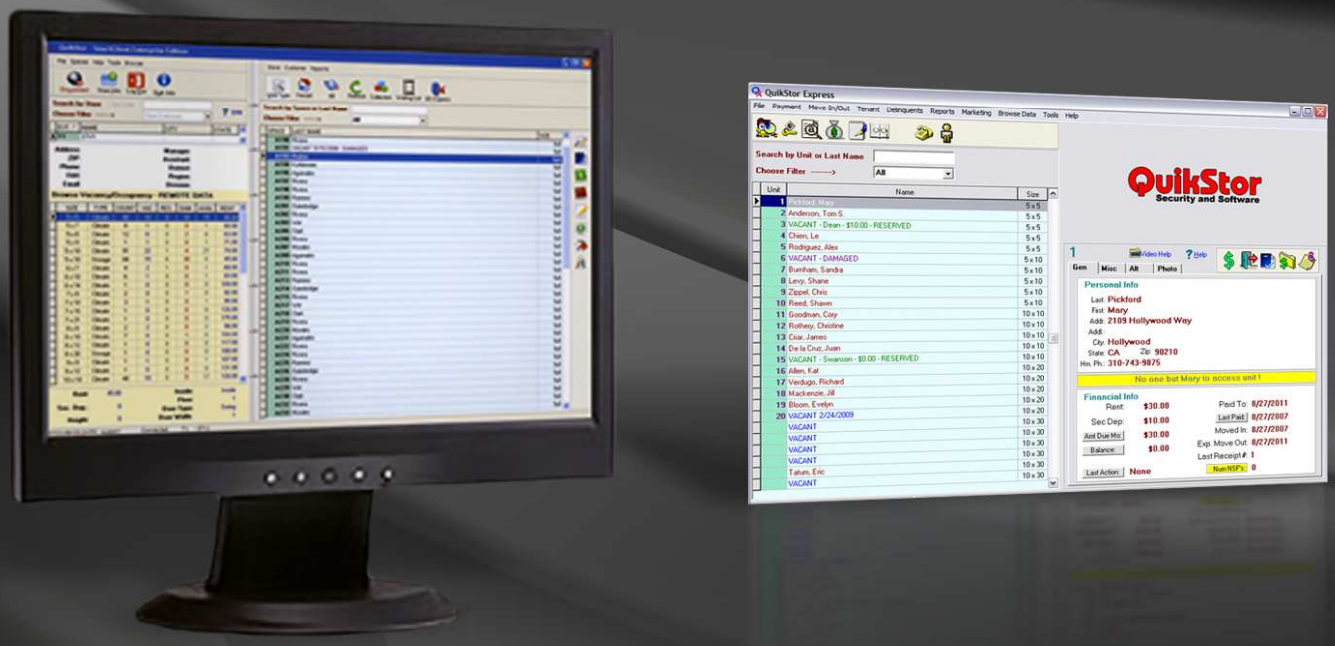
QuikStor Since 1987
Security and Software

QuikStor Express User Manual



6613 Valjean Avenue Van Nuys, CA 91406
Phone: (800) 321-1987 Fax: (818) 501-5785

www.QuikStor.com
Support@QuikStor.com

USER MANUAL

COPYRIGHT

The QuikStor Express manual version 4.0 is printed in the U.S.A. QuikStor believes that the information contained in the manual is correct. However, QuikStor reserves the right to revise the manual and make periodic changes to the content without a direct or inferred obligation to notify any person of such revision or changes. QuikStor does not assume any responsibility for the use of the manual, nor for any patent infringements or other rights of third parties who may use the manual or the software contained herein.

The software contains valuable trade secrets and proprietary information. Unauthorized use of the manual or the software can result in civil damages and criminal prosecution.

All trademarks, trade names, logos, and images used throughout this manual are the exclusive properties of their respective holders.

DISCLAIMER

QuikStor Express is constantly having subtle changes made to various screens as features are being added. Because of this, it is nearly impossible for screen shots in the manual to keep up, so screen shots you see here might be slightly different than what you see on your screen. Please try to follow the spirit of the screenshots, not the literal.

Also if you are viewing this manual from your computer and not on printed pages, you will notice that the page numbers written on the page may not match where they are within the file. This is because this manual is written for printed material. The program you are using will show you what page number you are viewing in the file itself, so if you are printing specific pages you will need to go by that number - not the number listed on the page itself.

Contents

What's new in QuikStor Express? ... 13
Getting Started ... 16
System Recommendations ... 16
Recommended Windows Settings while Running Express ... 16
Display Settings ... 16
Task Scheduler ... 17
Installing QuikStor Express ... 18
QuikStor Data Entry ... 19
Unit Setup ... 19
Unit Type ... 19
Add Unit ... 20
Unit Number ... 20
Tenant Information ... 20
Reports ... 21
Master list of Tenants ... 21
Final Processing checklist ... 21
What To Do After You Have Completed Final Processing Within Data Entry ... 22
Customizing the look of your Software ... 22
Software Setup ... 24
Site Setup (All Tabs) ... 24
Site ... 25
Printing ... 25
Technical ... 27
Additional ... 29
Additional charge Labels ... 31
Credit Card Processing ... 32
QuikStor Processing Tab Setup ... 32
Plug N' Pay (PNP) Tab Setup ... 33
Site Properties ... 34
Delinquency Setup ... 35
User Setup ... 36
Add A User ... 37
Delete User ... 37
Change Access For this User ... 37
Modify Default Templates ... 38
Unit Setup ... 39
Unit Types ... 40
Add Unit ... 40
Unit Number ... 40
Unit Type ... 40
How do I Delete an existing unit? ... 41
Revenue Optimization Center ... 42
Setup Specials and Discounts ... 43
Editing a Special and Advanced Mode ... 48
Using a Special during a move-in ... 51

Price levels 52
Optimize your revenue 56
Internet Setup 57
Outlook Integration Module Setup 57
NON-Outlook Integration Setup 62
California Law - Late Charge Setup 63
Inventory Setup 64
Required Fields Setup 65
Profile And Source Defaults 65
Destinations Setup 66
Setting By Filter 67
Setting By Individual 67
Billing Setup 67
Activating Optional Modules in Express (QSX Standard) 68
QuikPay 68
Export to QuickBooks™ 68
QuikLetter 68
Quik Email 68
QuikTruck 69
Microsoft Outlook™ Integration 69
BlueMoon Forms Integration 69
Driver's License Swipe (included with QuikPay) 69
QuikMap 70
QuikPhoto 70
QuikBackup 70
Mobile Reporting 70
Card/Check Scanning 71
Integrated Mail Service 71
Getting Help While Using QuikStor Express 71
Help Videos 71
On-Screen Help 72
Training Mode 72
Navigating inside of QuikStor Express 72
QUIKMAP USERS ONLY 73
Unit Search & Filter 73
Unit List 73
Main Menu 74
Gate Activity Window 75
Manager Icons 75
Unit/Tenant Icons 75
General Tenant Information 76
Miscellaneous Tab 76
Alternate Tenant Information 77
Map Tab 77
Practice Tasks 78
Practice Items 78
Photo Tab 78
Integrations 79
QuickBooks™ 79
QuikStor Setup 80
First Use 80

Subsequent Uses ... 80
QuikPay Direct ... 80
Follow these four easy steps to set up QuikStor Express for QuikPay Direct ... 81
How To Set a Tenant for Auto Credit Card Billing ... 82
If you do not have QuikPay or a credit card processor account ... 83
Integrated Mail Service ... 84
QuikPhoto ... 91
New Image ... 92
Load Image ... 92
Save To ... 92
Print ... 92
Email ... 92
Delete ... 93
QuikMap ... 93
Setup ... 93
Building QuikMap ... 93
QuikTruck ... 95
Add New Truck ... 96
Delete Truck ... 97
Edit Selected Truck ... 97
Add a Reservation ... 97
Edit Reservation ... 98
Un-Reserve ... 99
Reports ... 99
Voiding A Truck Payment ... 100
Overnight Report Scheduling ... 100
QuikStor Gate Integrations ... 102
Overview ... 102
Gate Functions in QuikStor Express ... 103
Gate Setup ... 103
Non-Tenant Codes ... 104
Reports ... 104
On Site List ... 105
Third Party Gate Integrations ... 106
QuikStor Kiosk Integration ... 106
QuikStor Call Center Integrations ... 106
QuikStor Online Listing Integrations ... 106
QUIKSTOR EXPRESS NOTIFICATION WINDOW ... 107
MANAGING YOUR SITE ... 108
Tenants ... 108
QUIKINFO PLUS (CTRL + F9) ... 108
Reserve Unit ... 109
Un-Reserve Unit ... 110
Move-In ... 111
Tenant Details ... 111
Alternate Contact Details ... 112
Miscellaneous Details ... 112
Automatic Billing Details ... 113
Choose A Payment Method ... 115
Cash ... 116
Check ... 116

Credit Card or ACH 116
Combined Payment....116
How To Do A $0 Move In 116
Reprint Lease Addendum (K-Y-B)....118
Make a Payment....119
Make A Different Payment 119
Choose A Payment Method: 120
Credit Card or ACH 120
Credit Card or ACH 121
Combined Payment....121
Emailing Receipts 121
How To Give Free Rent To Existing Tenants 121
How To Make A Different Payment With Credit....122
Linked Unit Payment....123
The amount on the check is more than the amount owed. 124
The amount on the check is less than the amount I'm owed....125
Former Tenant Payment 125
Reprint Receipt 126
Reprint All Receipts For A Date Range 126
Transfer 126
Delinquent Tenant Transfer....127
Undo Transfer 128
How Are The Tenant's Transfer Numbers Calculated? 128
Link/Unlink 129
Monthly Charges....130
Applying a Monthly Charge during a Move-In....130
Applying a Monthly Charge for an existing tenant 131
RENT TAX....132
Apply Rent Tax to Certain Unit Types 132
Apply Rent Tax during a Move-In....133
Apply Rent Tax to an existing tenant....134
Insurance Setup....134
Adding insurance to existing tenants....135
Adding insurance during a move-in....135
Generating a report of all insurance premiums collected....135
Insurance Is Always Paid With Rent....136
Canceling Insurance 136
Printing Pre & Cancel Insurance Notifications 136
Tenant Debit/Credit....137
How To Apply Credits & Debits 137
Debit 137
Credit 138
Using A Credit For Payment....139
Raise/Lower Rents....139
Current Tenants....139
Delinquent Tenants....139
Change Rent For An Additional Unit 139
Change Rent For Unit Type 140
Change Scheduled Rent By Unit Type....140
Change Scheduled Rent By Percentage....141
Return Scheduled Rent....142

Re-Print Rent Raise Letters 142
Notes 142
Expected Move-Outs....142
During Move In....143
Existing Tenant 143
Report 143
Move-Out 144
How To Pro Rate A Move-Out....144
Transferring a credit to a linked unit during a Move-Out? 145
Moving out a tenant with an owed balance....145
Undo Move-Out....146
Void a Payment 146
How To Void A Payment Not Made Today 147
Change Payment Method 147
NSF (Non Sufficient Funds) Check 147
Why Does The NSF Receipt Show Less Than Tenant Was Charged?....148
Change Paid-To....150
Refunds 150
Change Info 151
Insurance....151
Insurance: Send Pre-Cancel Letter 151
Insurance: Send All Pre- and Cancel Letters....151
Print Bill For Tenant....152
Print Notice For Tenant 152
Undo Delinquency Action 152
Print Custom Labels 153
Custom Letter 154
Tenant Transaction History....155
Tenant Payment History....156
Tenant Delinquent History....156
Tenant Rent History 156
Non-Tenant Purchase....157
Change Selected Units Type 157
Mark Unit Damaged/Undamaged 159
Bank Deposit....159
Manager Daily Debit-Credit 160
Allocate Credit/Debit 160
Print All Bills 161
Print All Notices 161
Apply Cut Lock/Advertising/Late Charges....161
How To Waive Or Remove UnwaNted Fees 162
Waiving fees 162
Removing fees 162
Post All Rents 163
Backup Database 163
Sending A Backup To QuikStor....163
Why Does My Backup from Yesterday Have Today's Date on It? 164
If you manually backup your database: 164
Automatic backup during Overnight Processing: 165
Backup Manager 165
Restore Database....166

Backup/Restore Non-Database Files 166
Backup 166
Restore 167
Overnight Processing 168
BROWSING DATA 169
Browse Data 169
All Transactions 169
Payments 169
Bank Deposits Made 169
Move-ins/move-outs 169
Former Tenants 170
Vacancy 170
Waiting List 170
Phone Calls 171
Tables Snapshot 172
UTILITIES 172
Site Notes – Calendar 172
Report Selector 173
Upload All Key Codes 173
Outbox 173
Send Email 174
How To Email Bills, Notices, and/or Receipts 174
Internet Setup 174
Tenant Information 174
Billing Setup 175
Word Processing 176
Editable Documents 176
Adding Graphics 177
Adding variables 178
I've just customized a document in Word Processing, and now it won't print! 179
Archive Database 179
Archive Data 180
Restore Archived Data 180
MARKETING 181
Competition Survey 181
Graphs 181
Tenant Sources Graph (E-L-C-G) 181
Unit Efficiency Report Graph (E-T-G) 181
City Analysis (E-L-E-G) 182
Month End Analysis Graph (E-R-M-G) 182
Daily Analysis Graph (E-R-E-G) 182
Total Occupied vs. Total Units (O-V-U) 182
Profile Breakdown (E-L-Q) 182
Tenant Sources 183
Tenant Sources (E-L-C) 183
Tenant Sources for a Date Range (E-L-D) 183
Tenant Sources for Revenue Breakdown (E-L-O) 183
Zip Code Analysis (E-L-F) 183
City Analysis (E-L-E) 183
Miles From Site (M-F-S) 183
Demographics Report (T-D-R) 183

Specials & Discounts.....184
List of All Specials (S-P-L).....184
List of All Specials (S-P-L-2) 184
Specials Available Today (T-S-L) 184
List of All Price Levels (P-L-L) 184
Price Levels Currently Effective (t-p-L) 184
Move-in Discount Tracking (M-T-D) 184
This report lists all move-ins that were performed with a Special, including Pro-Rate, Rent, Monthly Charges, Income Account, Inventory, Admin. Fee, Security Deposit, and a Discount Total of all discounts given for that move-in. A Grand Total is tallied at the bottom of the report for all move-ins during the selected period. 184
Move-in Discount Tracking detail (M-T-D-2) 184
This report, similar to the M-D-T report displays discounts given during a move-in with a Special. This report breaks down each discount on its own line for further detail and auditing. A Grand Total is calculated at the bottom of the report.**REPORTS** 184
REPORTS 185
Report Options.....185
Date Range Selection: 185
Using the Report Selector: 185
Report Center.....186
Setting up and using the Favorite Reports Utility: 187
Report Scheduler: 188
Emailing Reports.....189
Internet Setup.....189
Site Setup 189
Emailing the Report.....189
Daily Report 190
Daily Report (E-N) 190
Daily Report for a Date Range (E-N) 190
Occupancy and Collection Report by Unit Type (E-N-1) 190
Trial Bank Deposit (E-R-O).....190
Credit Cards to be Deposited (E-R-O-1) 190
Collections 191
Daily Analysis (E-R-E).....191
Collection Detail (E-P) 191
Collection Detail for All Tenants (E-P-A).....191
Collection Detail for ExistingTenants (E-R-J).....191
Cash-Only Collection Detail (E-R-4) 191
Collection/Deposit (E-Q).....191
Month-End Analysis (E-R-M).....191
Percentage Of Income By Cash, Check, And Cards (E-R-F).....192
Collections since the First (E-R-G) 192
Revenues Collected Per Unit (E-R-I).....192
Daily Analysis for postings and collections (d-p-c).....192
Non-Tenant Income (N-T-I) 192
Remote Payment Report (P-O-E).....192
Annual Revenue and Occupancy Report (R-I-O) 192
Monthly posted and Collected Rents (M-C-R) 192
Credit Card / Checking Account 192
Master List of Tenants with Auto CC Billing (E-J-C) 193
Master List of Tenants with Auto Debit (E-J-C-1) 193

Credit Cards to be Charged for a Date Range....193
Bank Account to be Charged for a Date Range....193
Credit Cards and Bank Account Details (E-R-2)....193
Credit Card Detail Report (E-C-D)....193
Credit Card Summary Report (E-C-S)....193
Check Summary Report (E-B-S)....194
List of Credit Cards about to Expire (E-J-C-2)....194
Credit Card Transactions by Type (T-C-C)....194
Vacancy/Occupancy....194
Unit Summary (E-S)....194
Unit Summary by Unit Type (E-S-1)....194
Unit Type Report (E-U)....194
All Unit Types Report (E-U-A)....195
Rent And Vacancy Schedule (E-F-A)....195
Unit List by Type Report (E-U-D)....195
Vacancy By Type (E-A)....195
Vacancy List (E-C and E-D)....195
Vacancy List with Notes (E-C-N)....195
Three Available (E-E)....196
Tenants Who Have Vacated (E-F-C)....196
Tenants Who Have Vacated With A Balance (E-F-C1)....196
Move-in Using Specials (M-S-P)....196
Expected Move-Outs (E-F-G)....196
Move-In Analysis (E-L-N)....196
Move-In Analysis Expanded (E-L-N-1)....196
Move-In & Move-Out Analysis (E-F-D)....196
Move-In & Move-Out Analysis Expanded (E-F-D-1)....197
Move-In Using Specials Report (M-S-P)....197
Unit Efficiency Report (E-T)....197
Unit Efficency Report by Unit Type (E-T-1)....197
Unit Efficency Report by Unit Size (E-T-2)....197
Occupany Analysis Report (E-F-E)....197
Contribution to Rent by Size (E-R-L)....197
Rent Analysis By Square Foot (E-R-C)....197
Red Lock and Damaged Checklist (E-Y-I)....198
Vacancy, Red Lock and Damage Checklist (E-B)....198
Damaged/Reserved Units (E-Y-H)....198
List Of Reserved Units (E-Y-H1)....198
Online Rentals and Reservations (O-R-R)....198
Online/Internet Conversions (O-R-R)....198
Delinquency....198
Delinquents List (F-B)....199
Delinquent Rents List – Auction Planning (F-B-1)....199
Actions Needed (F-A)....199
When will delinquency actions show up on the Actions Needed (F-A) report?....199
Notices Sent (F-C)....200
Late Charges - By Unit or Last Name (E-R-N1)....200
Red Locks To Put On (E-Y-R)....200
Red Locks To Take Off (E-Y-J)....201
Current but Owed Fees (E-R-N)....201
Collection Log (E-R-Z)....201

Friendly Reminder Callsheet (E-K) 201
Addresses for Certified Notices Sent (E-Y-Z) 201
Addresses for Notices Sent with a Certificate of mailing (E-Y-Z-1) 201
Late Charges Waived Report (L-C-W) 201
Billing 201
Upcoming Bills To Be Sent - By Unit, Paid-to-Date or Last Name(E-L-K) 201
Bills Sent for Any Time Period (E-L-M) 202
Billing Status - By Unit or Name (E-L-A) 202
Tenant 202
Master List of All Tenants (E-J) 202
Master List of All Tenants – by Unit Type (E-J-1) 202
Tenants Account Balance Report (E-J-2) 202
Monthly Charges for All Tenants (E-R-P) 202
Monthly Charges for a Given Time Period (E-R-Q) 202
List of Tenants who Moved Out (E-L-H) 202
List of All Tenants who have Prepaid (E-Y-Q) 202
List of All Tenants who have Prepaid Actual (E-Y-Q-3) 202
Linked Units (E-Y-P) 203
Tenants Getting a Rent Change (E-L-P) 203
Escrow List Of All Tenants (E-Y-L) 203
Future Rent Income (F-R-I) 203
List of Tenants a Manager would Least Likely Rent to Again (D-L-R) 203
Tenant Email Address (T-E-A) 203
Inventory 203
Current Inventory (E-Y-M) 203
Inventory Transactions - by Time or Item (E-Y-N) & (E-Y-O) 204
Quarterly Inventory Sales (Q-I-S) 204
Inventory Items Totaled by Item (F-R-E-D) 204
Exceptions 204
Free Rent (E-R-K) 204
Tenants Paying Less Than Scheduled (E-V) 204
Tenants Paying Less Than Scheduled by Unit Type (E-V-1) 204
Tenants Paying MORE Than Scheduled (E-Y-1) 204
Tenants Not Due On The 1st (E-L-I) 205
Rent Changes (E-1) 205
Manager Activity (E-Y-A) 205
Report on All Refunds (R-E-F) 205
Free Rent Audit (E-R-K-A) 205
Liabilities Detail Report (L-D-R) 205
List of All Tenants with NSF Checks (E-N-F) 205
Operations 205
Facility Summary Report (F-S-R) 205
Actual Deposits (E-R-Y) 205
Bank Deposit by Credit Card Type (E-R-Y-2) 206
Analysis of Length of Occupancy (E-L-G) 206
Report On Notes (E-W) 206
Facility Review / Walk-Around Form (E-Y-W) 206
List of All Units (E-Y-G) 206
Amounts Owed (E-R-D) 206
Length of Occupancy (L-O-C) 206
Waiting List (W-L-R) 206

Phone Call List (E-F-H) 206
Site Notes From Calendar (S-N-C)....206
User Setup Report (U-S-R) 207
Trucks Used During a Move-in (M-T-U)....207
Monthly Charges....207
Insurance Activity Report (E-Y-K)....207
Insurance Activity Report For a Date Range (E-Y-K-1) 207
Insurance Activity Report (E-Y-K-2) 207
Total Monthly Charges (E-R-W) 208
Details on Monthly Charges (E-R-W-1) 208
Gate Activities....208
List of All Gate Codes (E-Y-S)....208
List of Gate Codes for a Selected Unit (E-Y-Y)....208
Gate Activity (E-Y-C)....208
Gate Activity for Unit (E-Y-E)....208
Marketing Reports 208
Make a Bank Deposit (E-M) 209
Frequently Asked Questions....209
How To Search 209
What's the Difference between a Statement and a Bill? 210
I Received A Message About Backdating. What Do I Do?....210
How do I Transfer my QuikStor Express data to another Computer? 211
Why does Express Auto Pro-Rate at the End of the Month? 211
Print Screen in Windows 212
Database....214
Non-Tenant Purchase....215
INDEX....217

What’s new in QuikStor Express?

Version 4.0.2.1

FEATURES:

- Report Center - a new way of searching, previewing, and grouping your 150+ reports! In the Report Center you can see a preview of any report along with a detailed description. A search box allows you to search on keywords or titles. And quick links to add any report to your Scheduling module or to the Favorite Reports section.
- Added two new variables to the eCommerce section
    - Go Paperless! - this allows tenants to choose to have their invoices emailed to them instead of mailed
    - Auto Billing - a tenant can now choose to go on auto billing when they make a payment online
- Added the "X Days to Hold a Reservation" variable into the eCommerce section
- Added a section in the Competition Survey & Report to list a competitor's special
- Four new variables were added into the eCommerce tab to display/hide unit details - Height, Door Type, Floor, and Location (inside, climate, outside, etc)
- Your tenants can now add a custom password to access their account through eCommerce. A Reset Online Password button has also been added under the Tenant tab
- You can now select a former tenant during the move-in process to expedite the move-in
- When assigning specials or price levels to unit types, the window now displays how many of each unit types you have and how many are vacant
- When assigning specials or price levels to unit types, the window now displays which floor the unit is on
- Delinquent notice names can now be edited in the Delinquency Settings section. For example, you can rename a Second Late Notice to now be called a Courtesy Notice.
- Tenant Notes and Transaction History button has been added to the Browse Move-Ins/Outs window
- When a tenant is moved-in using a special, a note is now automatically entered in the unit's Tenant Notes section that includes the date/time, name of special, etc
- Default templates for the Pre-lien Notice, Lien Notice, and Declaration of Opposition to Lien Notice were updated

INTEGRATIONS:

- Online Marketing integration added - Storitz.com is now supported

MODULES:

- Integrated Mail Service - QuikStor and Accountable Document Solutions (ADS) have partnered to bring your facility an easy and low-cost certified mail option. You can now print certified labels directly through QuikStor Express and mail them right from your facility using your own printer, paper, and envelopes. ADS will even provide free envelopes!No more trips to the post office. You can send certified mail with or without an electronic return receipt. All records are archived for 7 years by ADS allowing you to view, print, or download at any time.

  In addition to certified mail printing, this integration provides a comprehensive outsourcing option for your first class, certified, or Certificate of Mailing notices. You can set any invoice or notice to automatically be sent to ADS during overnight processing where they will handle all aspects of mailing them for you.

REPORTS:

- Added the S-P-L-2 report which lists all specials setup at the property, including details such as status, coupon codes, etc.
- Added the E-Y-Z-1 report that shows all Addresses for Notices Sent with Certificate of Mailing
- Added the M-C-R report (Monthly Posted and Collected Rents) which shows, for each tenant, the amount of rent posted and the amount of rent collected for a full month. Totals are provided at the end.
- Added the M-T-D report (Move-in Discount Tracking) **-** This report lists all move-ins that were performed with a Special, including Pro-Rate, Rent, Monthly Charges, Income Account, Inventory, Admin. Fee, Security Deposit, and a Discount Total of all discounts given for that move-in. A Grand Total is tallied at the bottom of the report for all move-ins during the selected period.
- Added the M-T-D-2 report (Move-in Discount Tracking Detail) **-** This report, similar to the M-D-T report displays discounts given during a move-in with a Special. This report breaks down each discount on its own line for further detail and auditing. A Grand Total is calculated at the bottom of the report.
- Added the M-S-P report (Move-in Using Specials) - This report displays all move-ins that used a Special, and which special was used. It displays the move-in date, scheduled rent, amount paid, source, user, and if relevant the vacate date.
- Added the E-F-D-1 report (Analysis of Move-Ins/Move-Outs) - This report provides a detailed breakdown of move-ins and move-outs for a specified time period. Each move-in and move-out includes a row of details pertaining to the transactions to provide an easy-to-read snapshot. Totals are shown at the bottom of each section.
- Multiple schedules can now be setup in the Report Scheduler
- A single email will now be mailed to each recipient with all attached reports versus multiple emails with a single report attached
- The Daily Report can now be calculated for a previous date without accessing stored PDF files
- When a tenant is moved-in using a special, a note is added to the Daily Report about the move-in, special used, etc
- An Excel copy of certain reports sent during overnight processing will now be sent
- Subtotals have been added for each credit card type on the E-M and E-R-O reports

CREDIT CARDS:

- A new interface has been added for the PCI-compliant Plug N' Pay integration so that the redirect browser screen is no longer required.
- ACH functionality was added for the PCI-compliant Plug N' Pay integration
- Added void & refund options for the PCI-compliant Plug N' Pay integration when automatic batching is set
- Added the last four digits of the credit card number used on Auto Billing Agreement
- The last four digits of the current credit card used for auto billing is now displayed under the Change Credit Card button in the Auto Billing tab
- On the Auto Billing tab, you can now choose to delete the card on file without replacing it with another credit card
- The tenant information is automatically populated now on the Auto Billing tab when you create a new token using the Change Credit Card button.

Fixes and Corrections:

- Upload all Keycodes button added to the Modern View toolbar
- Improved user permissions for the Modern View toolbar
- The last view state is now preserved for both list & map view
- The administrative fee is now being correctly applied on the Storage Property Protection insurance integration
- The card scanner module will now prompt to save the Driver's License photos during a move-in with a special
- In Destination Settings, your selections for a given unit will no longer default to Print after a move-out
- You can now Preview a receipt during a move-in with a Special

Getting Started

Welcome to QuikStor Express, the self-storage management software written by storage professionals and used by the leading operators in the industry.

SYSTEM RECOMMENDATIONS

If you have not already installed QuikStor Express onto your computer, please review this section first. These are the system recommendations that your computer should have to comfortably run QuikStor Express:

- IBM Compatible Computer with a 400 MHz processor or higher
- 500 MB+ of RAM (Memory)
- 10 GB+ hard drive (1 GB available hard drive space)
- Monitor set to 800x600 resolution or higher
- Windows® 98, 2000, XP, Vista, or 7 (32 bit or 64 bit)
- Windows-compatible Printer
- A connection to the Internet (DSL, Cable Modem, etc.)
    - E-mail must support MIME encoded attachments
    - Minimum E-mail box storage capacity must be 3 MB or greater
- DirectX 8.1 or higher (Required for QuikPhoto)
- Remote Desktop Tool such as TeamViewer/LogMeIn (Free online) or Symantec's PC-Anywhere software, host version 9.x or later

QuikStor highly recommends the following items to protect your computer:

- UPS (Uninterruptible Power Supply) Battery Backup
- USB or serial surge suppressor for any gate system connections to the computer

RECOMMENDED WINDOWS SETTINGS WHILE RUNNING EXPRESS

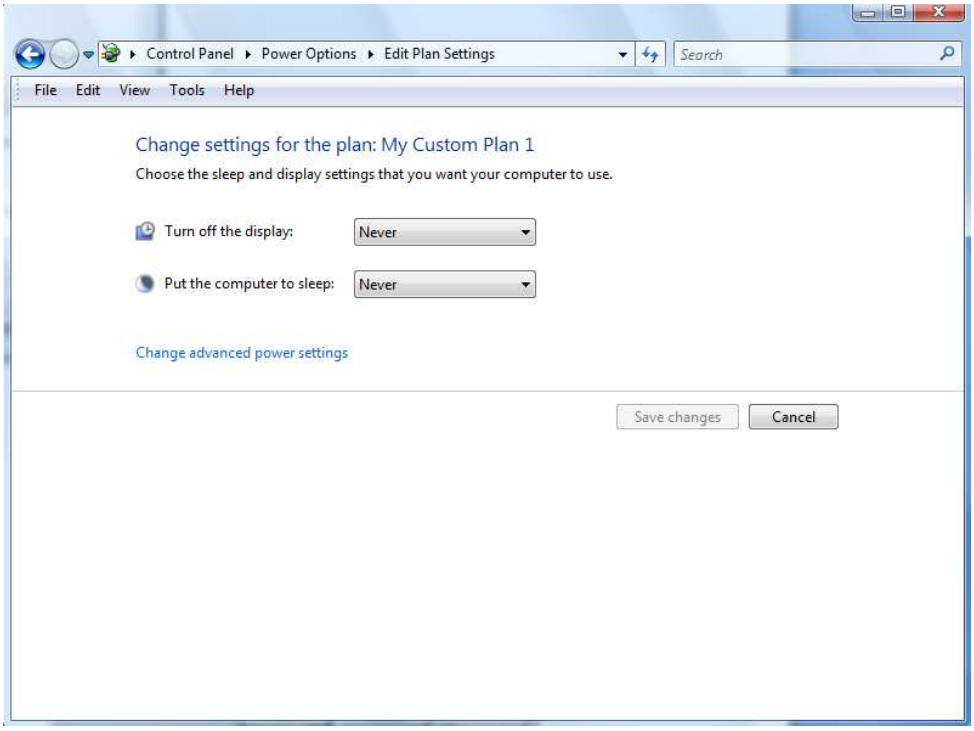
There are some features in Windows that allow you to save energy if you leave your computer running, or save time by automatically running recommended maintenance tools. But, those same settings can interfere with other processes that run automatically while you are away, like the Quikstor Express Overnights. If you are running into issues with overnights not completing, start by checking the following settings.

NOTE: These settings are recommended due to known conflicts between various aspects of Windows and the overnight process of Quikstor Express, QuikStor does not guarantee that changing these settings will not affect aspects of Windows. If you have any concerns regarding these settings, please consult the technician that assisted with your computer setup.

DISPLAY SETTINGS

How you access your display settings will vary depending on which version of Windows you are running, but you can typically access by going to the Control Panel or right clicking on your Desktop. When you enter the Display Settings window you want to confirm that the resolution is set to 800 x 600 or higher (the exact setting will depend on the size of your monitor and your own personal preferences, but 800 x 600 is the minimum for our software to display properly). Also use the "Colors" drop-down menu to the left of the "Resolution" slider to select at least 16 bit color.

Next go to the “Screen Saver” section and confirm that the Screen Saver selected says “None”. On this same tab you will find a “Power Savings” button or link. Click it and you will see the window below. Confirm that your monitor is never set to turn off, nor will your computer go into “sleep mode”. The screen below may look different on your computer depending on your version of Windows.



Once you have clicked “Save Changes” on this window, click on the OK button of the Display settings, and then close out of the Control Panel window.

TASK SCHEDULER

The Task Scheduler is a program that runs tasks automatically for you, like hard drive backups and other maintenance tools. However, if it runs a task, which accesses one of our files while that file is busy, that can cause conflicts. To be safe, either pause or turn the Task Scheduler off. To pause the Task Scheduler, right-click on the Task Scheduler icon in the System Tray down near your clock in the lower right hand corner ( ). Select Pause Task Manager from that menu. If you want to turn it permanently off, then select Open from that menu, and in the new window that comes up, go to the Advanced menu, and select Stop Using Task Scheduler.

Installing QuikStor Express

The packaging for the CD includes a label that has the default User Name and Password for QuikStor Express. Please keep this information handy as you will need it during installation and setup.

Insert the CD into the CD ROM drive of your computer. It should automatically start the installation, if it does not, follow the on-screen prompt to run the QuikStor Express setup program.

This will bring up a screen that looks like this:

If you are using Windows Vista or Windows 7 with User Access Control (UAC) enabled, please click the **Vista and Windows 7 users click here** button first for steps on how to disable UAC before the installation.

Start by clicking on the START HERE button. This will begin the installation of QuikStor Express. Click on the Finish button when the installation is done and it should take you back to the main installation window.

When QuikStor Express is installed, you will see a screen like this:

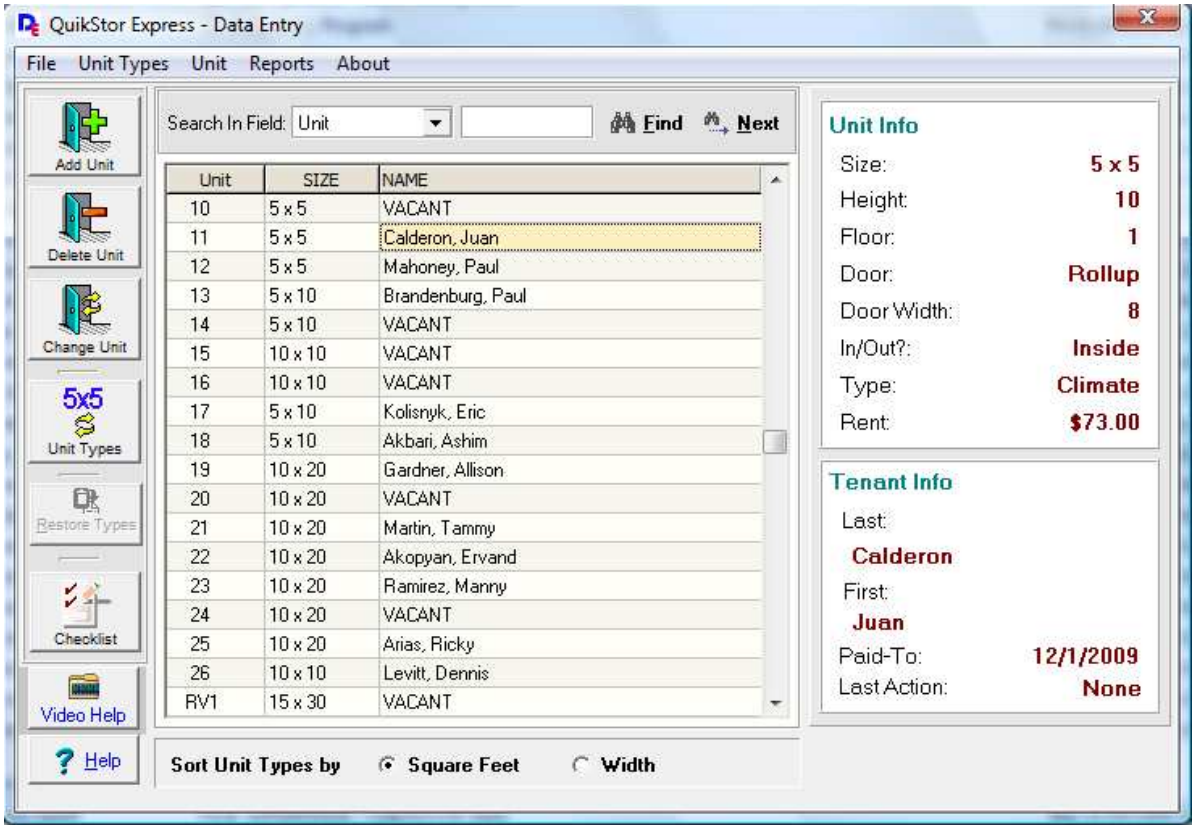
On this screen click the, “START DATA ENTRY” button and that will open the data entry program.

QuikStor Data Entry

NOTE: *This section is only for those facilities that have to input all of their information into QuikStor Express, not for those who have converted over to Express from another version of QuikStor or a 3rd party management software.*

QuikStor Data Entry allows you to enter your unit information

Click Start -> Programs -> QuikStor Express and select QuikStor Data Entry:



Note: *You will not be allowed to access the QuikStor Express management program until you have finished working with the Data Entry program.*

Below is a list of the information that must be entered into the program. Once you are done with the sections below, you will be able to start using the QuikStor Express management program. You will not use the data entry program again after this initial setup.

UNIT SETUP

UNIT TYPE

This window allows you to create a unit type. Later you will use these types to add specific units.

Go to the *Unit Types* menu on the toolbar and click on *Work With Unit Types*, or click on the *Unit Types* button on the main screen.

In order to define specific units in your facility, you must first define the unit types. For example, you might have 20 units that are 10X10 with roll-up doors on the first floor. Rather than re-enter all of this information each time you create a new unit, you simply create a unit type with those parameters. Each time you create a unit with those attributes, you will define it as this type.

To add a unit type into your system, click on *Add Type* and fill in the information boxes. Once you finish entering your unit type information, click on the ✓OK button to add the new type. Repeat this process for each different unit type you have in your facility.

Note: You must fill in all of the required information or you will not be able to click the ✓OK *button. The only optional fields are security deposit info and the checkbox at the bottom of the window. If options like "Type" or "Door" do not apply, simply choose "Other" from the pull-down menu.*

When you have filled in all of the information, click the ✓OK button.

ADD UNIT

This window allows you to add individual units to your site, using the unit types you have created.

To add a unit to your system, go to the *Unit* menu on the toolbar and select *Add Unit*, or click on the *Add Unit* button on your main screen. For each unit that you add, you will have to fill in a Unit Number, a Unit Type, and whether it is Vacant/Occupied. Below is a description of each of these actions.

UNIT NUMBER

Every time you add a new unit to your site, you must enter an alphanumeric unit "number" in the specified field. You will not be able to enter a number/letter that corresponds to a unit that has already been created. When you have entered a number/letter in the specified field click the ✓OK button.

TENANT INFORMATION

This window allows you to enter the basic information for a unit that is already occupied.

When creating a unit that is already occupied, you need to enter information about the existing tenant and their financial history.

Begin by entering the tenant's name. The last name is required. Then enter the Move-In date and the Paid-To date. The Paid-To date is very important. This, combined with an accurate monthly rent, will determine the tenant's current balance.

You can also add monthly charges by clicking the Add Monthly Charges button.

Enter any credits or debits on the customer's account by clicking the Balance button and entering the amounts in the appropriate fields.

To tell the program whether you have sent a late notice to this tenant recently (and if so, which kind), select one of the choices from the pull-down menu next to "Have you sent this tenant a notice recently?"

If you wish to make a more detailed entry of the tenant's information (address, phone number, etc.) you can click on the Do Detailed Entry button.

Finally, you can enter the security deposit the tenant gave you (if any) on Move-In.

Once you have confirmed that all of the information is correct, click the ✓OK button.

You may also delete or change the information for any of these units. Select a unit from your list and go to the *Unit* menu on the toolbar then select either *Delete This Unit* or *Change Unit Info*, depending on which action you would like to make.

REPORTS

MASTER LIST OF TENANTS

There are three reports that you can print out from the Data Entry program. All operational reports are available through QuikStor Express.

- Master List of Tenants
- List of All the Units
- Unit Efficiency Report

To run these rports, go to the *Reports* menu on your toolbar and select the report you wish to run. The *Master List of Tenants* contains a complete list of all of the tenants in your site. This list also includes all vacant units. The *List of All the Units* report provides a summary of all units. The *Unit Efficiency* report provides an analysis of how your unit mix is using the square footage available.

This is the most important, and next to last step before you finish with the Data Entry program and begin using Express. Print the *Master List of Tenants* and please read it thoroughly. It may seem tedious, but you'll only have to do this once, and it will keep your site running smoothly for years. Please pay special attention to Paid-To dates and balances.

Important: *You must print this list out before you are able to complete data entry!*

FINAL PROCESSING CHECKLIST

This is the last step you will take in the Data Entry process. This window gives you a checklist to make sure that you have performed all of the above functions.

To perform this function, go to the *File* menu on the toolbar and select *Final Processing Checklist*, or click on the *Checklist* button on the main screen.

Once selected, a window will come up showing you a checklist of the above procedures. If you haven't completed all of the sections it will not let you perform Final Processing. Even if you are done with all of the steps above, it is always a good idea to check your work. If you are at this screen and want to check through your work one last time, click on the ✓Return to Main Screen button.

When you are sure that you have entered all of this information correctly, and you are ready to begin working with QuikStor Express, go to the Final Processing Checklist window and click on the Perform Final Processing button.

IMPORTANT NOTE: *Once you have performed Final Processing, you will not be able to use the Data Entry Program again. All adjustments from then on will be performed in QuikStor.*

WHAT TO DO AFTER YOU HAVE COMPLETED FINAL PROCESSING WITHIN DATA ENTRY

Once you have completed the Data Entry process, the rest of the initialization process is very easy. The following is what you must do prior to the first night's Overnight Processing:

1. Go to File -> Site Setup -> Change Site Setup. Go through the options in each tab screen, and confirm that the settings fit your business model. Note that there are four options that you cannot change: Facility Name, Address, City, and Insurance Serial Number. These will be taken care of in Step 5 below.

2. Go to File -> Delinquency Setup. Confirm that there is a check mark next to each delinquency option your facility uses, and each option for each delinquency setting is correct to fit your business model.

3. Go to File -> Internet Setup. Confirm your e-mail address, SMTP Server Name, and account name are correct. Confirm all other options in the General screen are correct, and confirm all options for automatic e-mailing are correct as well. This is also where you will setup your eCommerce options if you accept online payments/rentals.

4. For California facilities go to File -> California Law Late Charge Setup. Make sure to complete this to exactly how your site pertains to California Law. This must be done prior to renting any units so that your late charges are correct.

5. Your QuikStor Support technician must input the facility name, address, and city. In order to facilitate this, you must be on the Internet and provide the support technician with the information listed below. Please type and either fax or e-mail this information to your technician with the EXACT spelling, capitalization, and punctuation you wish to appear in the software, on all reports, letters, etc.
    a. Your IP Address
    b. Your Facility Name
    c. Your Facility Address
    d. Your Facility City

Once your technician has this information, they will connect to your computer via the Internet and input it directly in your database. Once completed we will contact you to let you know that you're all set and ready to begin your first day managing your facility with QuikStor Express!

Customizing the look of your Software

QuikStor Express has a new look since version 4.0! Those familiar with Microsoft Office 2007 or newer will recognize the "ribbon menu" which provides a clean and intuitive menu that is icon versus text based. Because we recognize that there will be users that prefer to keep their current look, we have kept the, "Classic Mode" perspective that keeps the icons and look the same as in previous versions. For those that want a more modern look with more customization, we have added two updates:

- A modern icon-driven menu bar at the top of the program – don't worry though, Classic View is still available and you can easily switch between the two at any time or even run them both simultaneously.
- The boxes on the screen are now customizable. This means you can personalize your screen to work best for your needs. In addition you can hide boxes that you may not use very often, such as the gate activity screen, giving you more real estate for your map/list

view. This is just the beginning of some wonderful additions to the look and functionality of QuikStor Express!

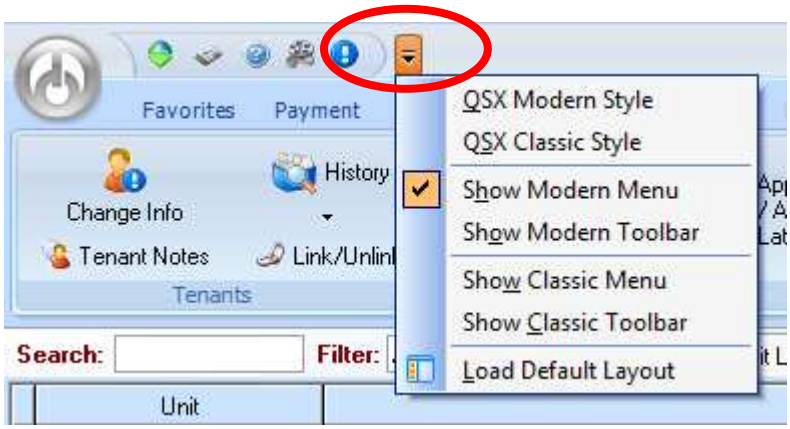
The first thing you will notice is the large QuikStor icon button in the upper left-hand corner. It is gray  until you click on it, then it turns red  . This button will be present regardless of which style you choose.

Clicking on it provides a quick way to access important Site and Internet Settings. It also provides a shortcut to your Help screens and direct access to the QuikStor website.

Users can Logout or Exit the program from this menu as well.

To the right of the QuikStor button are five icons that are also always present regardless of the style chosen. From left to right they are:

- **Check for Updates** – click this to see if you have the latest QSX version
- **What's New in Express?** – this brings up a window with the latest Express features and news from QuikStor
- **Help** – this button takes you to the Help menu
- **Video Help** – clicking this button brings up QuikStor video help for key functions throughout the program
- **About** – this shows you the version number of Express

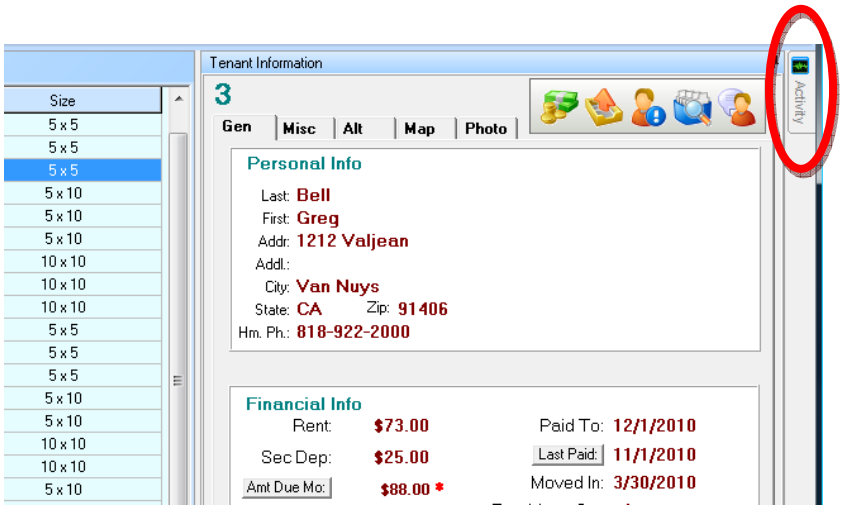


Switching between Modern View and Classic view is easy. Click on the drop down arrow and select which mode you would to view. You can select individual toolbars or an overall style. Mix-N-match to find the right combination for you!

If you move boxes around and find that you do not like the way they look, or just want to return to the standard view simply return to this drop down menu and click on Load Default Layout.

Once you decide on how you want your menu structure to look, next you can arrange the key informational boxes on the main screen, namely the Gate Activity box and Tenant Information box.

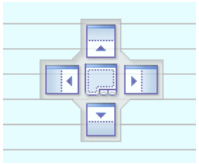
You can choose to reconfigure the boxes or "unpin" them from the screen altoghther, to unpin a screen click on the  icon on the right hand side of the boxes title bar. Once you do that it will hide the box as seen in the below screenshot:



To view the box again place your mouse cursor over the box name (as seen in the red circle) and the screen will un-hide for as long as your cursor is placed there. If you click the box name the hidden box will unhide permanently until you hide it again. This is a great way to provide more real estate on your main screen and to only view certain information as needed.

At any time you can pin it back to your main screen by clicking the  button.

To reconfigure the box locations around the main screen you would left click anywhere in the blue title bar below (other than the pin) and drag it to where you want it.



You will see arrow bars that look like plus signs (like the one above), or single arrows like this one  . Drag the title bar to one of the arrows and let go of the left mouse button. This will relocate it to this position. You can do this as often as you like to any of the configurable boxes.

Remember, at anytime you can go to Tools -> Load Default Layout or click this option on the Views drop-down menu as described above to return to the standard layout.

For the purposes of this manual, walkthroughs and instructions will be provided in Classic View.

Software Setup

IMPORTANT NOTE: Site Setup and Delinquency Setup are the two sections you should work with first as they are critical for your operations. Please do not skip to any other sections until you finish this setup.

SITE SETUP (ALL TABS)

The Site Setup window is used to view or set all of the variables for your site. For example, you can set up the bank account number, rent tax (if applicable) and an NSF charge.

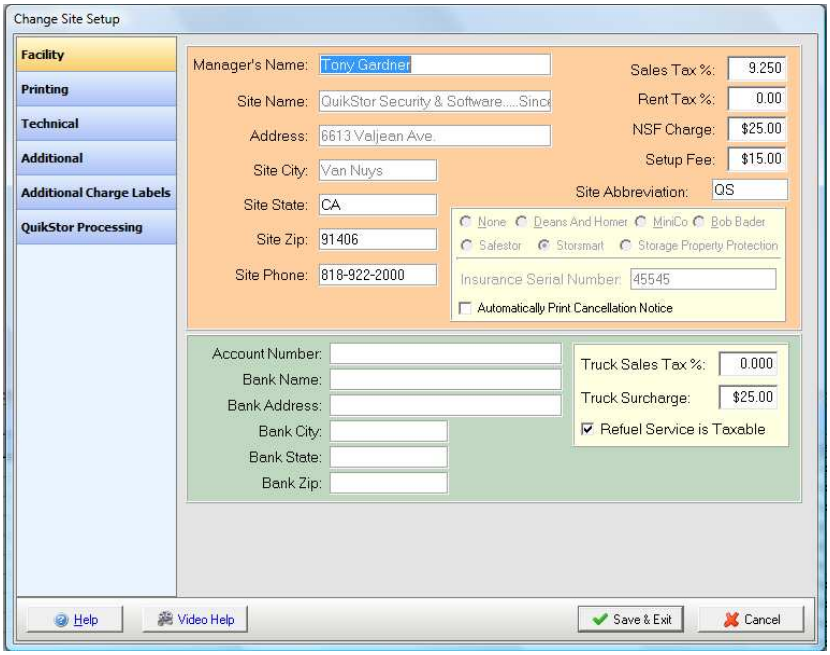
To get to this window go to the File menu on the top toolbar and select Site Setup.

These windows allow you to view or change site variables. If you select View Site Setup from the Site Setup menu you will only be able to view the tabs. If you wish to make any changes, you must select Change Site Setup. If you are not certain which you selected, simply look at the title at the top of the window.

From here, you will need to click on the other tabs at the top of the window and enter the setup information there. You can save your changes by clicking the ✓Save & Exit **button. To cancel any changes you have made, click the ✗**Cancel **button.**

SITE

This is the main site setup tab. This allows you to set up the main site variables, such as Manager's Name.



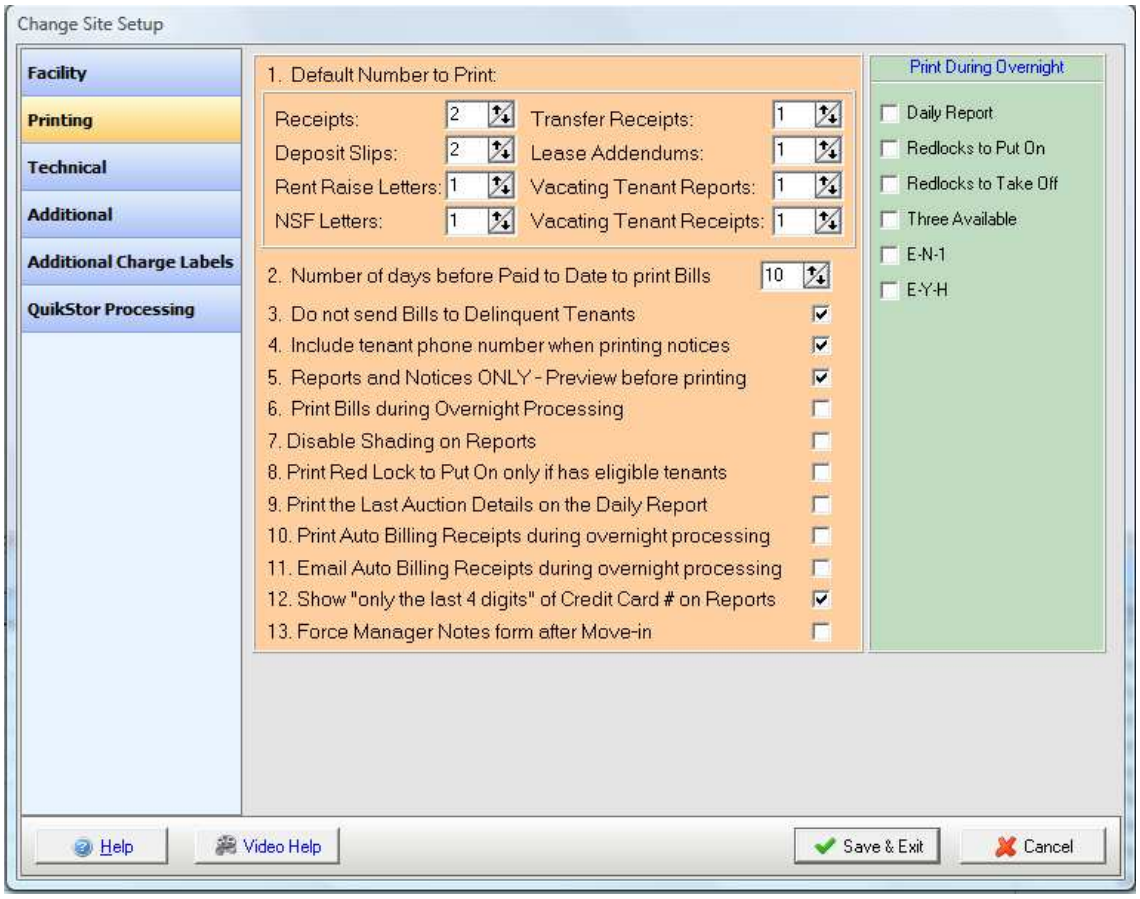
Within this tab, you can setup all of your major Site information, and also your bank Information. Use this tab to set up items such as NSF charge (see page 147 for more info on NSF charges), Sales Tax (applicable to all inventory items), Rent Tax (applicable to rent only) and Setup Fee (charged and adjusted upon move in).

If you rent trucks you will also set the tax rate for your truck rentals, truck surcharge, and whether or not refueling charges are taxable.

The only items within this tab that you cannot edit, is the: Site Name, Site Address, Site City, and Insurance Serial Number. These four items can only be edited/entered by a QuikStor Technician.

PRINTING

This tab allows you to select how many copies of certain documents will print. You may also select whether to preview the reports before printing.



Receipts – Receipts are printed when payments are applied and may be given to the tenant for his/her information, or kept at the site for its records.

Transfer Receipts – These receipts are generated when a tenant moves from one unit in your facility to another. They may be given to the tenant for his/her information, or kept at the site for its records.

Deposit Slips – These are printed when you make a bank deposit from the Reports menu and contain information about the payments made since the last bank deposit.

Lease Addendums – These addendums are generated when a tenant is moved into a unit and contain information about the unit and the tenant.

Raise Rent Letters – These letters are produced for your tenants in the event that rent rises at your facility.

Vacating Tenant Reports – These reports are produced when a tenant is moved out of his/her unit and contain information about the tenant and the unit.

NSF Letters – In the event that a tenant's check is returned to you due to Non-Sufficient Funds, this letter will inform him/her of the returned check and of any additional monies due.

Vacating Tenant Receipts – These receipts are produced when a tenant is moved out of his/her unit and are given to the tenant.

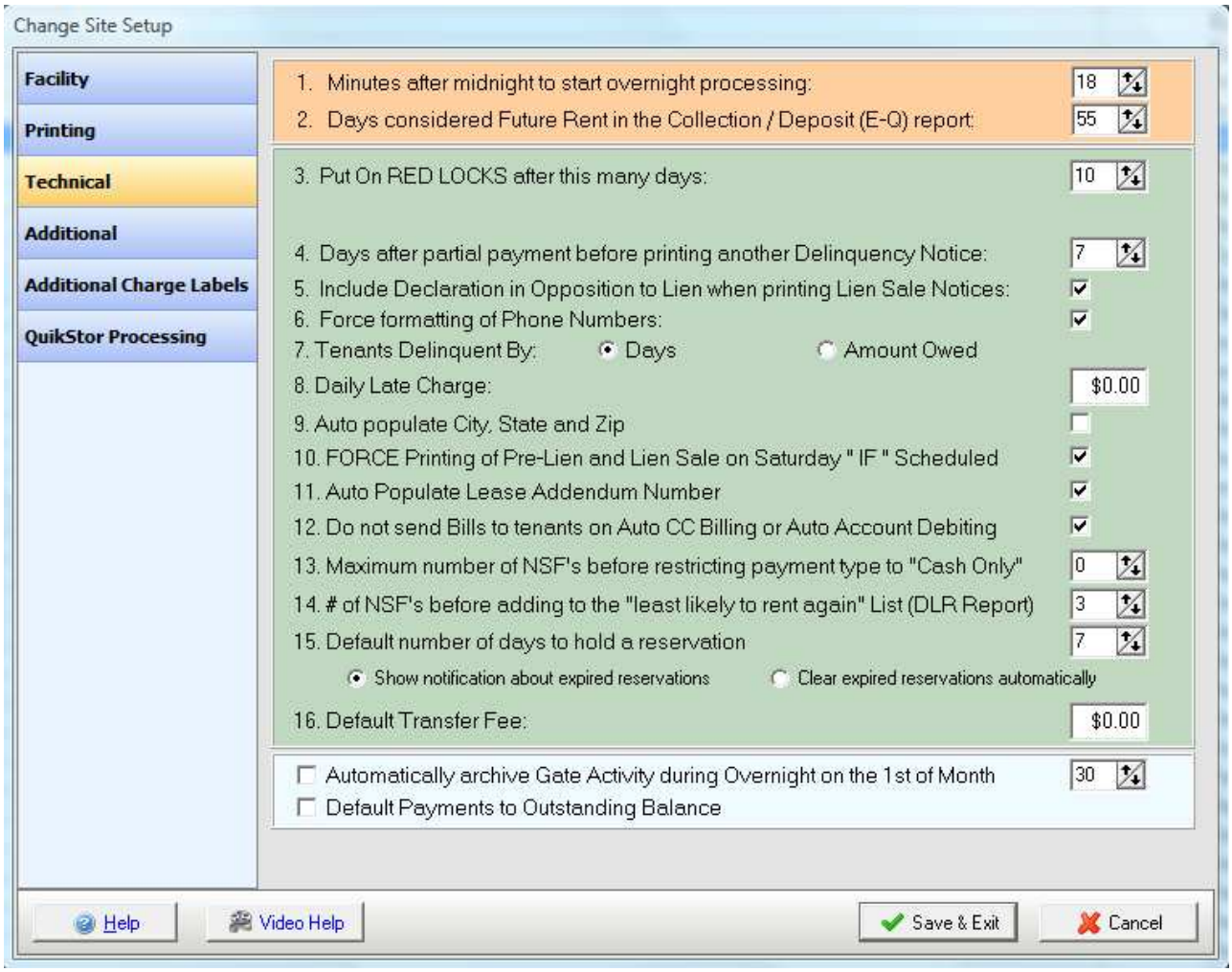
Number of days before PTD to print Bills – This lets you select how many days before the Paid-To Date you would like your tenants' Bills printed. Setting this to "0" will make them print on the PTD.

You may click to check or uncheck options 3 to 13 to decide whether to preview reports before printing, print the bills during overnight processing, etc. Also there is an option (#7) available to allow you to disable the gray shading on the reports that are printed from QSX. This makes it easier to be faxed to either home offices, tenants, or to QuikStor Support.

You also now have the option to disable any of the overnight reports from printing. On the Right hand side of this window you will see a list of all of the overnight reports. By default they are all checked except for the E-N-1 (Occupancy and Collection Report by Unit Type) and E-Y-H (Damaged/Reserved Units). Simply check those reports you wish to print during Overnight Processing.

TECHNICAL

This tab allows you to enter the technical details about your site. This includes specific information about how your site handles certain tenant and unit issues.



Options 1-4 are number values. Decide on an appropriate value and either click on the field and enter the number, or use the arrows to raise or lower the value. Below is an explanation of what each of these options is, along with explanations of the other options in this window.

Option 1 allows you to set how many Minutes after midnight to start the overnight processing of Express. By default it is set to 20, but you can change that to what best suits your site.

Option 2 references the Collection/Deposit Report (E-Q). This setting is what that report goes off of to come up with the information about Free rent. For more information on this report go to page 191 within this manual.

Option 3 allows you to put in how many days after a person is delinquent to put RED LOCKS on.

Option 4 allows you to set a number for "Days After Partial Payment Before Printing Another Delinquency Notice. Below is a brief explanation of this option.

Let's say that you have a tenant who is four months late. They've received a first late notice, a pre-lien notice, and a lien sale notice. This tenant comes in and only has enough money to take care of the charges and rent for three months – a partial payment. You accept their money, and they leave. This tenant is now one month late.

The Express system knows only that the tenant is one month late, not that you have just taken a considerable sum of money from them. Two days later, another first late notice prints. This could lead to a very upset customer.

This option screen allows a certain number of days (that you specify) after a partial payment before Express prints another delinquency notice for that tenant.

You can check **Option 5** to have Express print out a Declaration in Opposition to Lien for a tenant when you print a Lien Sales Notice for him/her. This document gives him/her the opportunity to file an Opposition to your Lien Sales Notice. Your facility is not required to do this, but it gives your tenant one last chance to set up a payment plan.

Option 6 allows you to check if you would like to "Force formatting of Phone Numbers." This allows you to have Express automatically insert the "dashes" within your tenants phone numbers.

Option 7 requires you to select either that the tenant is delinquent by Days or by Amount Owed. This means either the tenants will be made delinquent if they are past their Paid-To Date, or they will be delinquent if they owe money, but their Paid-To Date is in the future.

You set **Option 8** by entering the amount of the late charge in the space provided. Setting this to "0" will indicate that there are no late charges for delinquent tenants. The **Daily Late Charge** applies the first day the rent is late, and every day after that until the balance is paid.

Option 9 allows you to auto-populate the City, State and Zip code of tenants and potential tenants in the move-in, reservation and waiting list fields. You should only check this option if many of your customers come from the same area.

Option 10 gives you the option to have Pre-Lien and Lien notices print automatically on Saturdays if it is scheduled for that day. If you are a site that is normally closed on Saturday and are afraid you may miss a notice for a customer, this prints out that notice for you instead of you printing it manually, as normally done.

Option 11 allows you to auto populate the Lease Addendum Number. With this checked it means that every time that you print out a new lease addendum retroactively a new number in the sequence will happen, instead of you having to input a lease addendum number every time.

Option 12 will allow you to decide if you want to send bills to tenants on auto-billing

Option 13 allows you to set the total number of NSFs that a tenant can have before restricting them to cash only

Option 14 allows you to set the total number of NSFs before adding a tenant to the DLR report

Option 15 sets the default number of days that a reservation is held

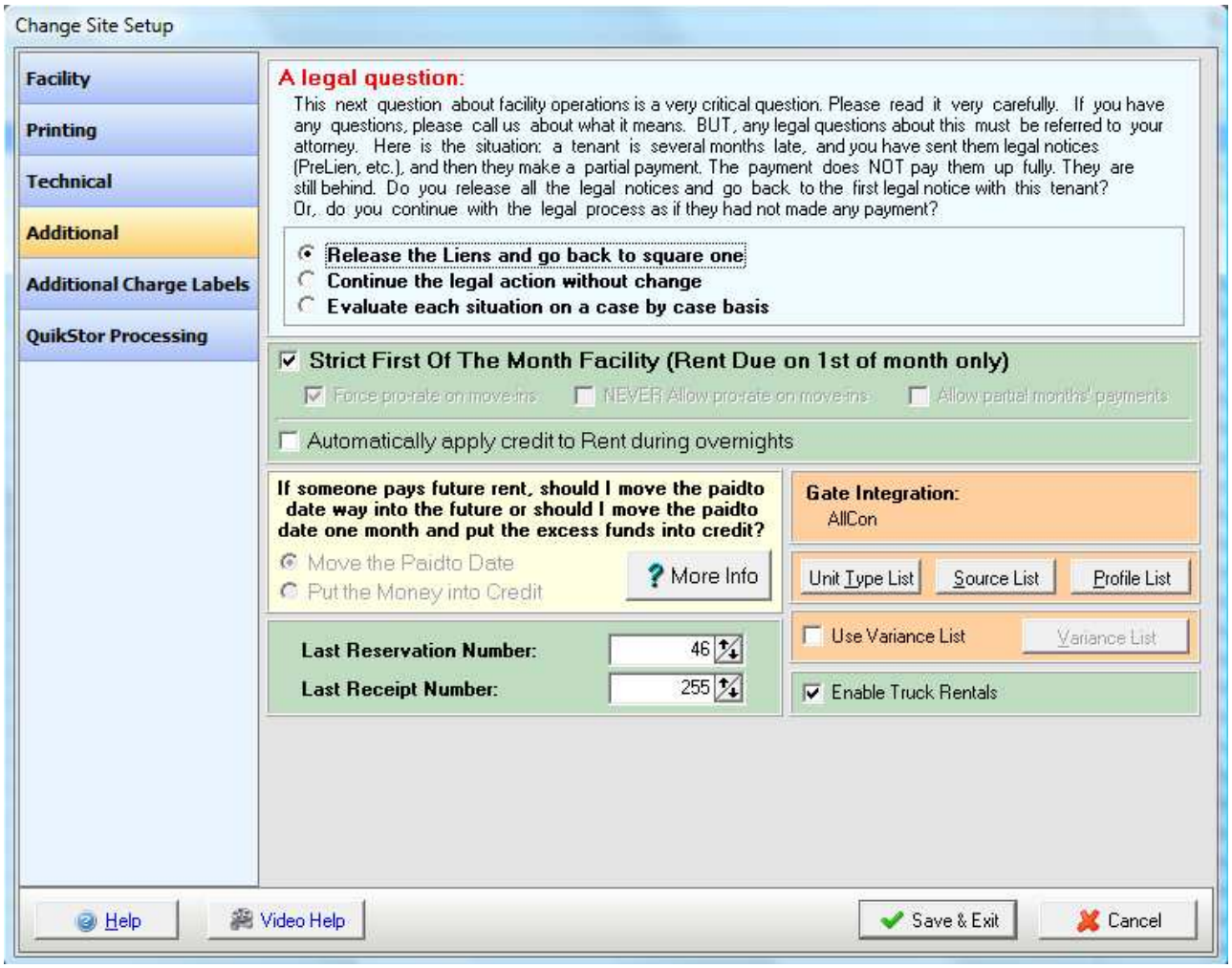
At the bottom you will find two final checkboxes:

- Automatically archive gate activity – if this box is checked your gate activity will archive on the first of each month. To the right is a numbered box where you can enter in the number of days that you would like to archive activity for.

- Default payments to the outstanding balance – if this box is checked payments will automatically be applied to the outstanding balance first

ADDITIONAL

This tab allows you to enter additional information about how your site functions, including legal details.



Please read the legal question carefully and click on the appropriate option. This is a very important question regarding how you run your site.

To set your site to Strict First of the Month click the checkbox to the left of the “Strict First of the Month Site” text. If this is checked, you disable the two sub-options (It will automatically force pro-rates and not allow partial payments). Partial Payments will be placed in credit instead.

To designate your site an anniversary site, make sure “Strict First of the Month Site” is not selected, then decide if you wish to “Force pro-rates” or “Allow partial months payments” by checking or un-checking those options. Setting it to Anniversary will make the tenants Paid-To Date thirty days after the anniversary of their Move-In date if one month’s rent is paid.

To learn more about changing your site from Anniversary to Strict First of the Month, go to page Error! Bookmark not defined. within this manual.

Inside of the yellow box you have the option to decide what to do when someone pays future rent. You may select to move the Paid-to-Date forward or to apply the money as a credit for the tenant.

Above the yellow box you see a checkbox titled, “Automatically apply credit to Rent during overnights”. Check this box if you want to automatically apply the credit you selected in the yellow box.

If you have an access control system integrated to Express, such as QuikStor’s Guardian system, it will be displayed on this tab.

You can also create and edit lists for your site. Use this function to customize unit types, source list, and profile list. As necessary, you may add, change, or remove items from any of the lists below.

Unit Type List - This button allows you to customize or change the description of a Unit Type. Some Unit Type descriptions are included by default such as Climate, Parking, etc. If your facility has a Unit Type description that does not fall under a more recognized label, you may change an existing Unit Type description or add to those already listed. When you are finished editing this list, click the ✓**OK** button.

Source List - This button allows you to customize your facility's Source List ("How did they hear about us?"). Options such as Internet, Previous Tenant, and Yellow Pages are already listed for your convenience. You can easily add more that pertain to your area to keep track of how tenants heard about your facility. You may enter a Source of Tenancy for each of your tenants upon rental. When you are finished editing this list, click the ✓**OK** button.

Profile List - This button allows you to customize the Profiles used at your facility. Commercial, Personal, Government Tax Exempt and Non-Profit Tax Exempt have been included by default. You can add, delete or customize profiles as you wish. Tenant profiles may be useful for tracking the type of customers you have, and may help you determine pricing based on customer type. When you add a new profile, you need to type in the description of the profile, a 3-letter code for the description, and check the tax-exempt box, if it applies. When you are finished editing this list, click the ✓**OK** button.

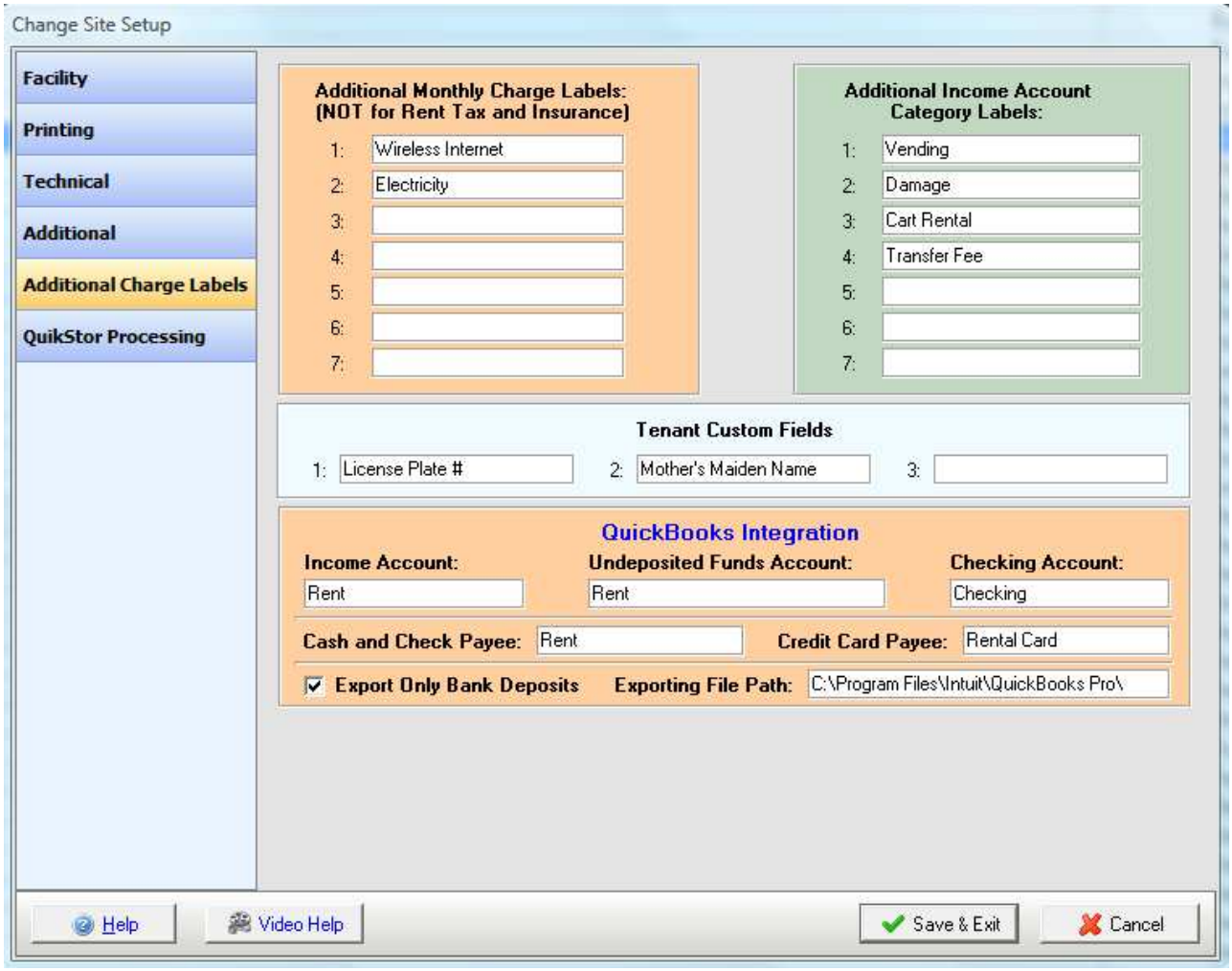
Variance List – This button allows you to customize the reasons why users are performing non-standard actions, such as Change Paid-To-Date, Tenant Debit & Credit, etc. This button by default is unchecked, which means that if a manager or employee does one of these actions, they can type there own reason. By putting a check mark in this option, the user will only be able to use the reasons you enter in the list, and will not be able to type their own. You can add, delete, or change these variances as you wish. "Manager Discretion" has been included in the list by default, and will be automatically returned to the list if you delete all the variances. When you have finished editing this list, click the ✓**OK** button.

At the bottom left of this this tab you can mark the last number used for a Reservation or Receipt. Simply put in the last number used for these so that new reservation and receipt numbers will start after these numbers.

At the bottom right of this tab you can check if you want to enable the Truck Rentals option in Express. By default this is checked.

ADDITIONAL CHARGE LABELS

This tab allows you to assign names for any additional charges you may wish to assess when a tenant moves in or during payments.



To add a charge label, enter it in the first free field in the appropriate column.

The **Additional Monthly Charges** section is used to assign names to additional monthly recurring charges that you may wish to assess a tenant. *(Example: You might charge a monthly fee for electricity used).* You will assign a dollar amount during the actual Move-In process, or when you add the charge to his/her recurring bill. You will be able to apply actual dollar amounts to these categories during Move-In by clicking the **Monthly Charges** button in the **Financial** Tab.

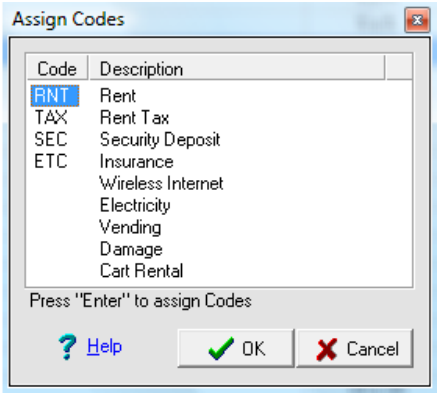
Additional Income Account Category Labels are used to assign a name to any one-time charges you may wish to assess *(Example: You might need to charge a tenant a fee to repair damage done to the unit or the site).* You will be able to apply actual dollar amounts to these categories during Move-In by clicking the **Miscellaneous** button in the **Financial** tab, or by clicking **Make A Different Payment** in the payment window and entering the amount in the appropriate field.

There are three fields that you can enter as custom fields. These fields allow you to customize information you want the manager to enter for each tenant move-in. For example, you could make a field called, "Mother's maiden name" to put in the tenant's record. This information will show up on the main screen of

QSX within the alternate tab of a tenant's information.

The bottom of this tab will only be displayed if you have purchased the QuickBooks Integration. Here you will set variables used to transfer information to QuickBooks.

Assigning Category Codes



You can assign three-digit codes to each category that you entered above by going to Tools -> Assign Categories. This will bring up a small window that allows you to assign codes to different types of income, such as rent, rent tax, security deposit, insurance, etc.

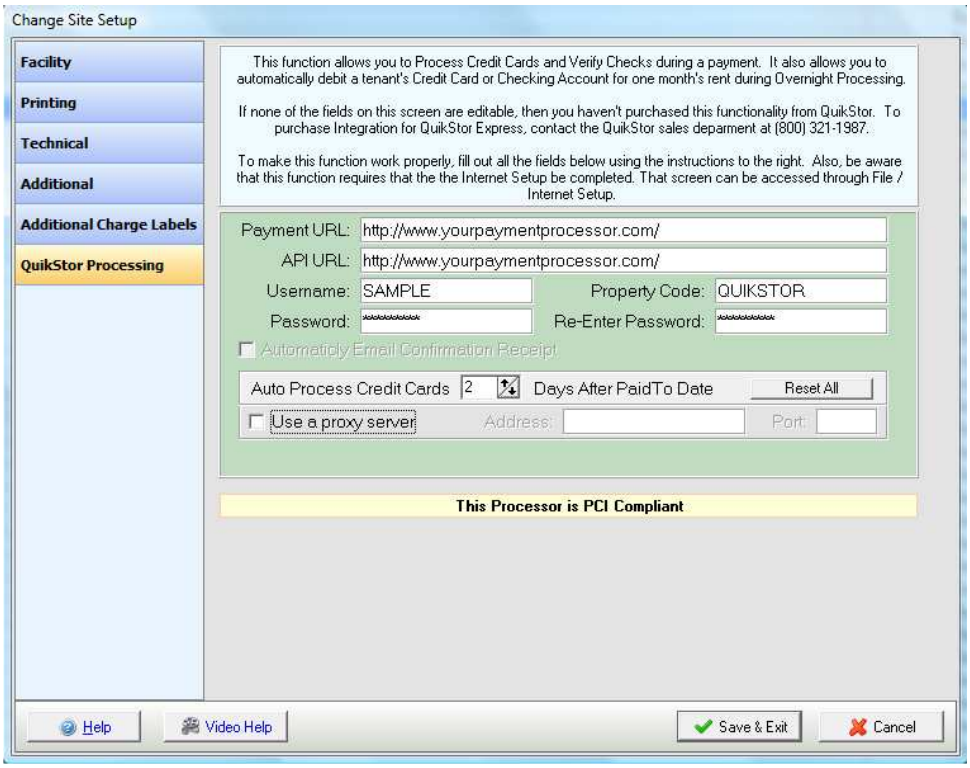
In the past, even before using management software was popular in the self storage industry, owners would typically assign such codes to income categories. This feature has been added to help facilitate those that still use such codes. Type in the code you wish for each of these items, and click the ✓**OK** button.

CREDIT CARD PROCESSING

Note: This section of site setup is only for those sites that have a Plug N' Pay or QuikStor Processing account installed on their systems.

QUIKSTOR PROCESSING TAB SETUP

This tab allows you to set up all of your QuikStor Processing settings in Express.

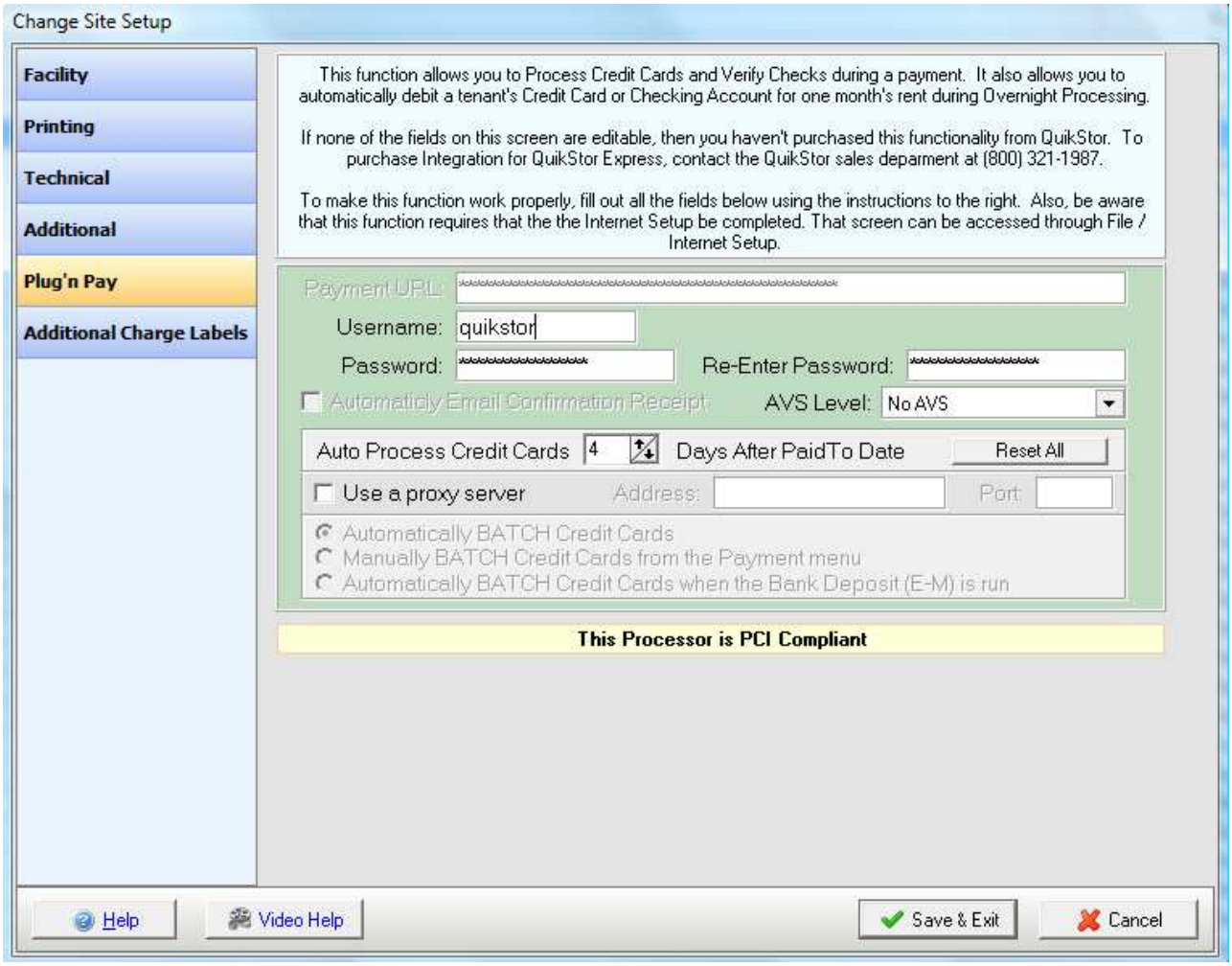


QuikStor Processing is a comprehensive credit card and ACH solution for self storage facilities. The payment gateway and credit card processor are from the same company and offer a tight integration with QuikStor Express. QuikStor Processing is 100% PCI compliant and offers facility owners the convenience of making payments directly in Express while not storing any credit card information in the software.

On this tab you will enter in the Payment URL for the payment server where you payments will be made. When you create your merchant account with Storage Rent Payment they will provide QuikStor with the URL and parameters to setup this tab for you. You will also be able to set how many days after a Paid-To-Date you want to process credit cards on auto billing or if you would like to use a Proxy Server.

PLUG N' PAY (PNP) TAB SETUP

This tab allows you to set up all of your PNP settings in Express.



Plug N' Pay is the payment gateway for your credit card processing. QuikStor Express interfaces directly with Plug N' Pay and Plug N' Pay interfaces with your credit card processor. Plug N' Pay is fully PCI compliant and all credit card information is entered directly into a secure browser window connected to Plug N' Pays server.

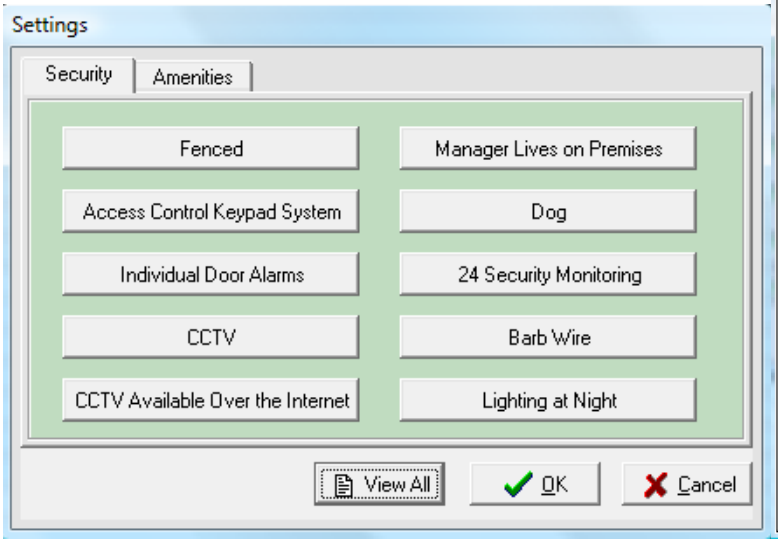
On this tab you will enter in the Payment URL for the Plug N' Pay server where you payments will be made. When you create your merchant account with Plug N' Pay they will provide QuikStor with the URL and parameters to setup this tab for you. You will also be able to set Address Verification Levels (AVS) and how many days after a Paid-To-Date you want to process credit cards on auto billing or if you would like to use a Proxy Server.

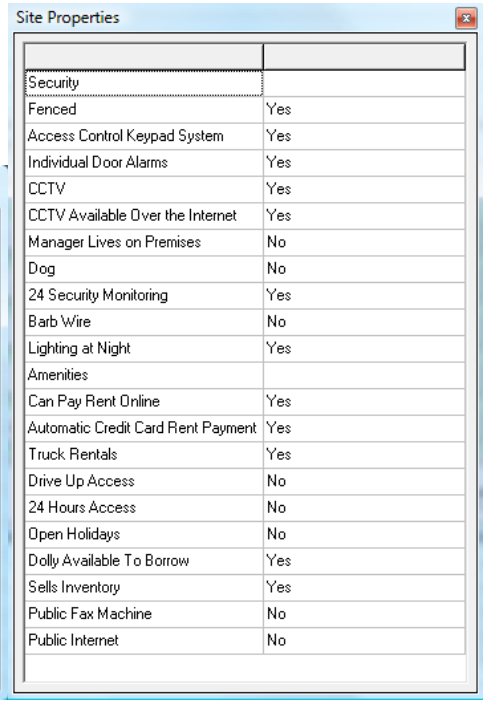
Once you have entered in the labels you want at this time, check the fields to make sure they are correct, and then click the ✓Save & Exit **button to confirm your choices.**

***Note**: This will save **all** of your changes and exit Site Setup, so if you wish to make any other modifications to your site, do so **before** clicking ✓OK.*

SITE PROPERTIES

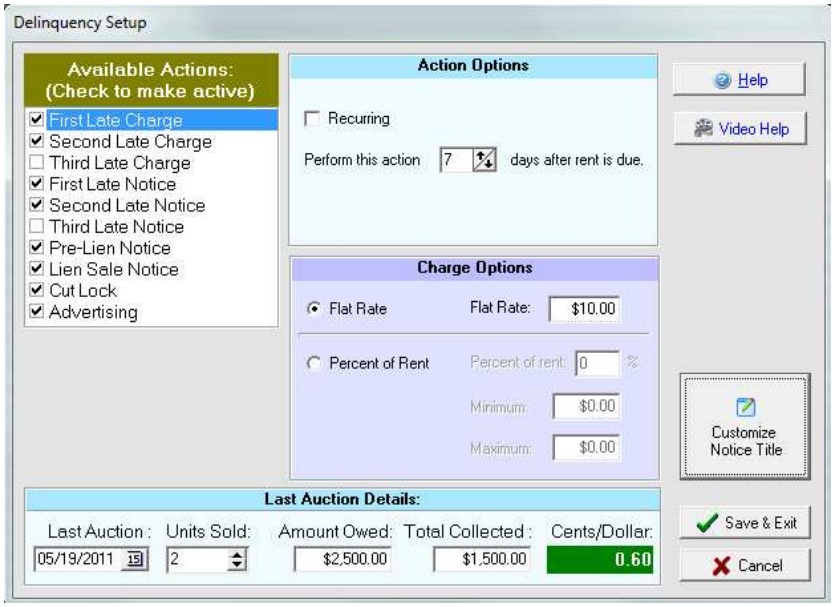
This screen allows you to select what security features and amenities your facility offers. This is a great tool that new employees or relief managers can reference when prospective tenants call or come in. It is also available for Call Center operators and SmartClient home office personnel who may not be familiar with each property.





Security	
Fenced	Yes
Access Control Keypad System	Yes
Individual Door Alarms	Yes
CCTV	Yes
CCTV Available Over the Internet	Yes
Manager Lives on Premises	No
Dog	No
24 Security Monitoring	Yes
Barb Wire	No
Lighting at Night	Yes
Amenities	
Can Pay Rent Online	Yes
Automatic Credit Card Rent Payment	Yes
Truck Rentals	Yes
Drive Up Access	No
24 Hours Access	No
Open Holidays	No
Dolly Available To Borrow	Yes
Sells Inventory	Yes
Public Fax Machine	No
Public Internet	No

DELINQUENCY SETUP



This window allows you to change how QuikStor Express handles tenants that are late paying their bills. You can choose what notices and charges are given, and when they are given.

Note: *to setup Daily Late Charges, go to File -> Site Setup -> Change Site Setup -> Technical*

To get to this window go to the File menu on the toolbar and select Delinquency Setup.

The first step in using this screen is to click on the name of the delinquency action with which you want to work. The actions are listed in the box marked "Available Actions". The checkbox next to the option will set whether that option is active.

Once you have clicked on one of the available actions, you can apply various options to that action.

Note: *Only the options that are relevant to the highlighted action will show on the screen.*

Action Options – This will allow you to determine whether or not this action recurs, even if the tenant is still delinquent from last month. You can also decide how many days after rent is due this action should be performed. If the Action is Pre-lien, you can also choose when the action will expire. This is an important step. Whatever time frame that you specify for the Pre-Lien to expire is when your Lien Sale notice will print out.

Charge Options – This will allow you to adjust what charge is applied to this action, if any. You may choose either a flat rate fee, or a percentage of the tenant's rent (giving a minimum and maximum fee charged). For both the Advertising and the Cut Lock fees you will set the charges up here, but when the time comes for them to be applied you will need to do that manually (for info on how to do that in Express please refer to pg 161 - Applying Charges).

Print Options – These options will allow you to choose who will get delinquency notices, whether they print during overnights, and how many copies will print.

At the bottom is the "Last Auction Details" box that allows you to enter information about your last auction event. This information will be displayed on the next day's Daily Report.

You may customize the name of any delinquency notice, for example you may call the Second Late Notice a Courtesy Notice. To customize the notice title click on the *Customie Notice Title* button on the lower right corner of the Delinquency Settings window.

When you have modified all of the necessary actions, click the ✓Save & Exit **button to save and exit.**

Late Charges - Maximum of 100% of rent!

A monthly ceiling of 100% of each tenant's rent is applied to the late fee category. **THIS IS THE LAW**! There is no choice on this.

This maximum is reset each month on the anniversary of the tenant's Paid-to-Date.

For example, if you have a tenant with $50 rent due on March 1st, and you are setup to have a 1st late charge of $20 applied on the 10th of the month, and a daily late charge of $9 each day after that, the tenant will receive charges as follows:

Date	Late Fees Applied / Total	
March 11th:	$20	Total $20
March 12th:	$9	Total $29
March 13th:	$9	Total $38
March 14th:	$9	Total $47
March 15th:	$3	Total $50
March 16th – 30th:	$0	Total $50
etc.		

Daily late charges will be applied each month starting on the anniversary of the first month's first Daily Late Charge. In the example above, the first daily late charge for April will be applied on April 12, and will continue until the total late charge applied in the month of April is $50.

If you use a 2nd and even a 3rd late charge, or even a recurring 1st late notice, the same concept applies – the total late fee within 1 month of the Paid-to-Date cannot exceed the tenant's monthly rent.

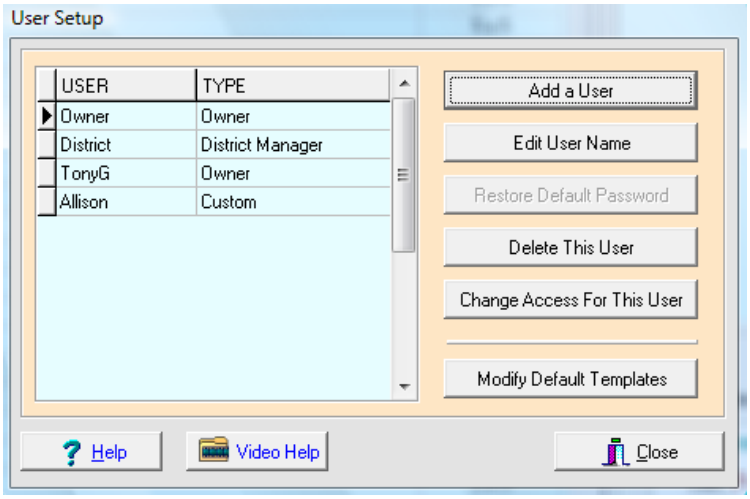
NOTE: This only applies to charges in the "Late" category. This does not affect other charges such as Pre-Lien or Cut Lock charges.

User Setup

This window allows an owner to create user names for the users of QuikStor Express. It will also allow an owner to assign which features of the program each user will be able to access.

Note: *This option is grayed out under normal configuration. A special owner's password is required and given to the owner solely. If you are an owner and would like to use this setup and were not given the password please contact your QuikStor Account Representative.*

To get to this window, go to the File menu on the toolbar and select User Setup.



Assigning users and setting their access is one of the most important security measures you can implement in QuikStor Express. It allows you to limit access to sensitive sections of the program, and prevent certain users from accidentally viewing, changing or deleting important data.

When you open QuikStor Express, you are prompted to enter a user name and password. By creating a unique user name for each employee, manager, and general user of QuikStor Express, you can

limit access to sensitive areas of the program. Using this tool you can specify which areas of the program each individual user can access or change.

Below are the four different items you can work with within this window and a description on how to use each.

ADD A USER

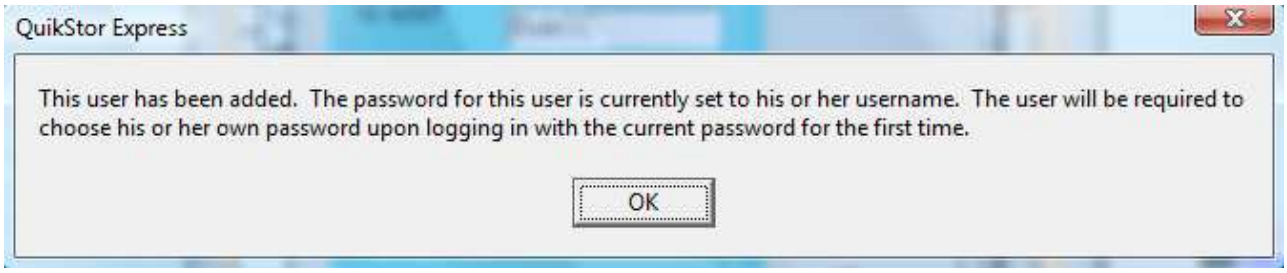
This window allows you to enter in the name and access for a new user of the QuikStor Express software.

Start out by entering a name for the new user. ***NOTE:*** *The User Name you enter must be at least 5 characters in length.*

Then select the user access level from the drop down menu provided. No matter which level you choose, you can customize this on the next screen.

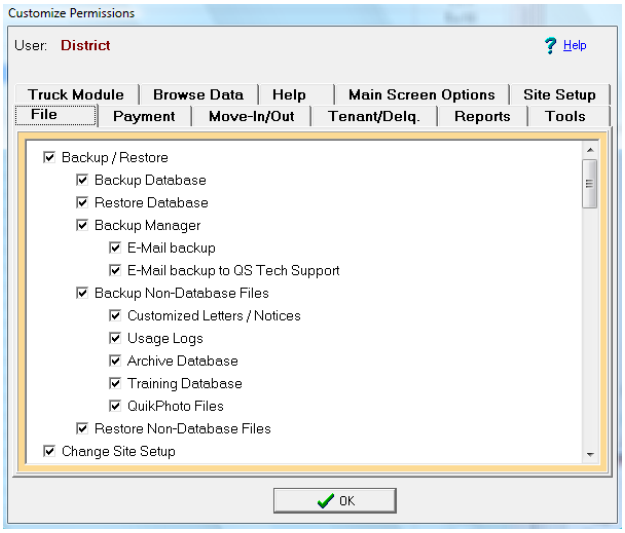
After adding the user a screen will popup (see below) that informs you what password to enter when you login and how to change your password at startup.

Once you finish with this window, click on the OK button to continue, or if you wish to exit without adding this new user click on the Cancel button.



DELETE USER

This function allows you to delete a selected user from your list.



To select a user, click on his/her name. When selected, the name will have an arrow (►) to the left of it. Simply click on the "Delete This User" button, and then either click ✓OK to continue with the deletion or Cancel to go back to the main window with deleting the selected user.

CHANGE ACCESS FOR THIS USER

This window allows you to change the access right for the selected user.

After you have selected the user you wish to deal with and select this option, you will be given the option of changing the user's access level. Owner, District Manager, Manager, Assistant Manager & Guest are the default levels you can choose from.

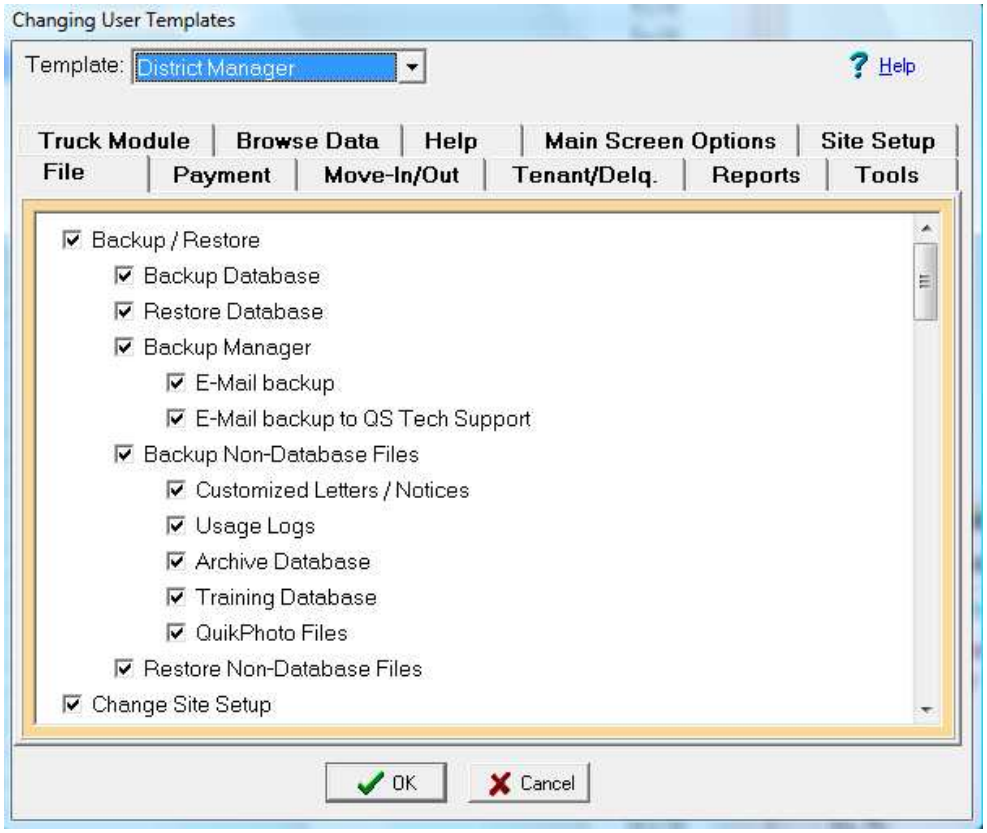
Then if you have selected any other level other than Owner, you can click on the "Customize Access" button to bring up a window that allows you to choose which specific options you would like this user to have access.

Once you are finished with this window click on the OK button to save the changes and exit, or the Cancel to exit without saving.

MODIFY DEFAULT TEMPLATES

This window allows you to modify the default user templates that are currently within express.

Begin in this window by first selecting which user access level you would like to work with from the Drop Down Menu at the top of this window. Your options are District Manager, Manager, Assistant Manager, and Guest. Express will not allow you to modify the template for the Owner access level. By default the District Manager is selected, with the File menu tab selected as well.



To add different items within Express that you want the selected access level to have access to, simply click in the checkbox next to the item. If you do not want the selected access level to have access to a certain function, uncheck the box.

TIP: *If you are on a tab (such as "Reports") and you want the user to have access to the entire section, or vice versa, you can "Right Click" anywhere within this tab and a menu will appear and you can either choose to select all items or unselect all items*.

Once you have finished modifying these templates click on the OK button to save the changes and exit, click on the Cancel button to exit without saving.

When you are done editing the users, click the ✓OK **button.**

When you login to Express for the first time using one of the new users that you created you will enter the new username as the username and password. The screen below shows you how you will assign a personalized password to that new user:

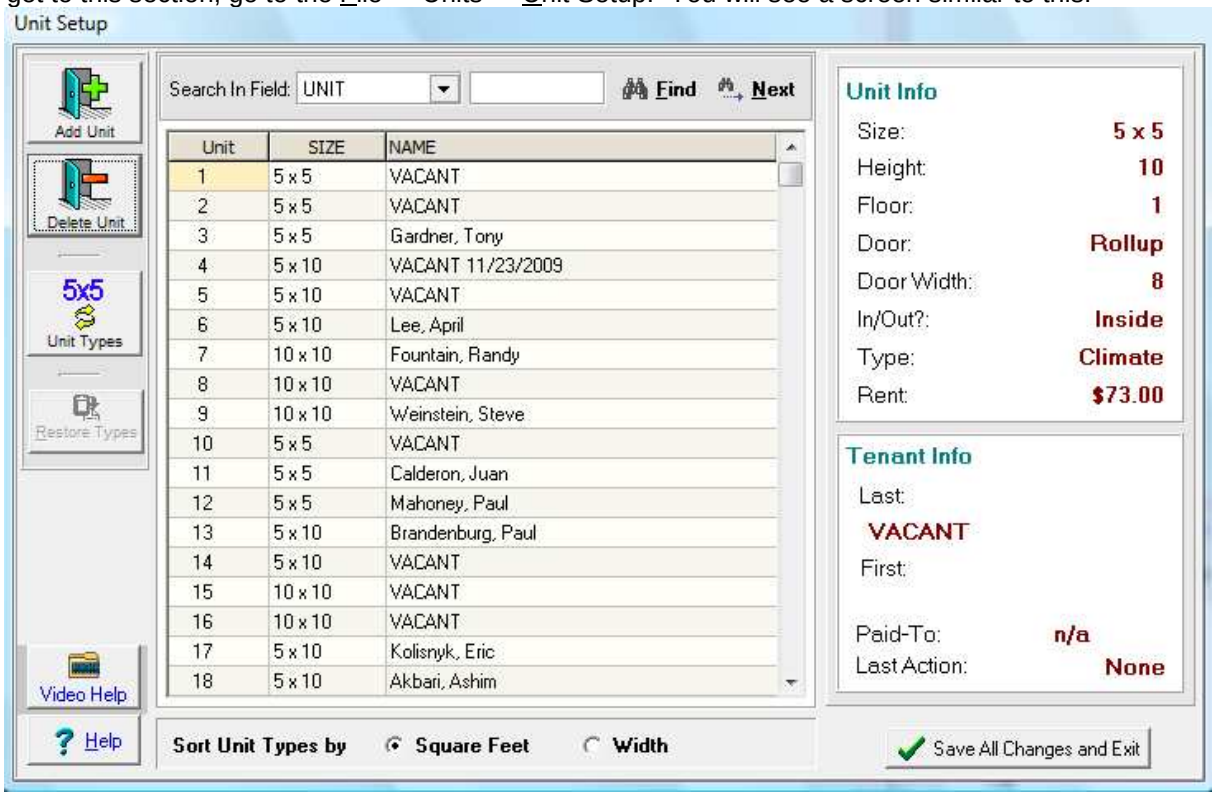
The username and password must not be the same and are case sensitive.

The password must be at least 5 characters in length.

Unit Setup

Note: If your site is not converting data to Express from another QuikStor product, this action must first be performed in the Data Entry program that comes with QuikStor Express. For more information, please see the Data Entry section of this manual.

To get to this section, go to the File -> Units -> Unit Setup. You will see a screen similar to this:

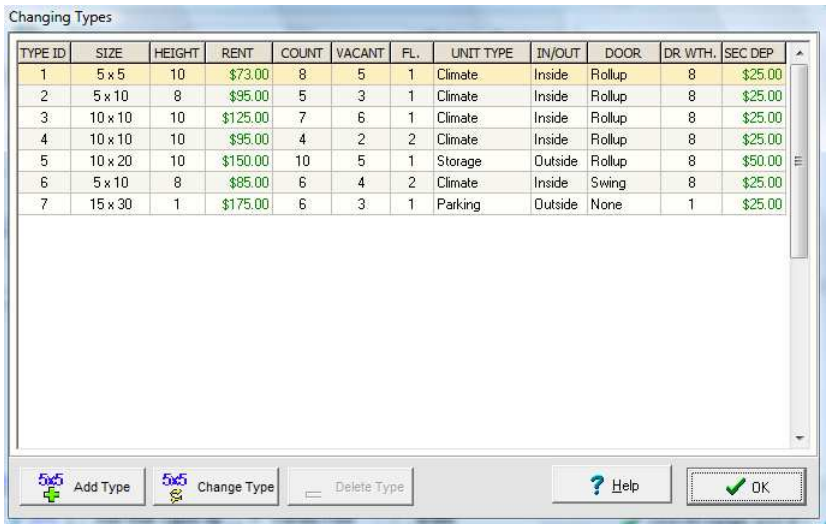


You will use this window to add new units, work with unit types, or delete existing vacant units.

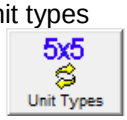
Below are the functions you can access within this window, with a brief description of each.

UNIT TYPES

This window allows you to create a unit type. Later you will use these types to create specific units.



TYPE ID	SIZE	HEIGHT	RENT	COUNT	VACANT	FL.	UNIT TYPE	IN/OUT	DOOR	DR WTH.	SEC DEP
1	5 x 5	10	$73.00	8	5	1	Climate	Inside	Rollup	8	$25.00
2	5 x 10	8	$95.00	5	3	1	Climate	Inside	Rollup	8	$25.00
3	10 x 10	10	$125.00	7	6	1	Climate	Inside	Rollup	8	$25.00
4	10 x 10	10	$95.00	4	2	2	Climate	Inside	Rollup	8	$25.00
5	10 x 20	10	$150.00	10	5	1	Storage	Outside	Rollup	8	$50.00
6	5 x 10	8	$85.00	6	4	2	Climate	Inside	Swing	8	$25.00
7	15 x 30	1	$175.00	6	3	1	Parking	Outside	None	1	$25.00

To work with the unit types section click on the 

button.

In order to define specific units in your facility, you must first define the unit **types**. For example, you might have 20 units that are all 10X10 with roll-up doors on the first floor.

Rather than re-enter all of this information each time you create a new unit, you simply create a unit type with those parameters. Each time you create a unit with those attributes, you will define it as this type.

Note: *You must fill in all of the required information or you will not be able to click the* ✓**OK** *button. The only optional fields are security deposit info and the checkbox at the bottom of the window. If options like "Type" or "Door" do not apply, simply choose "other" from the pull-down menu.*

When you have filled in all of the information, click the ✓OK **button.**

ADD UNIT

This function allows you to add individual units to your site, using the unit types you have created.

To add new units click on the 

button.

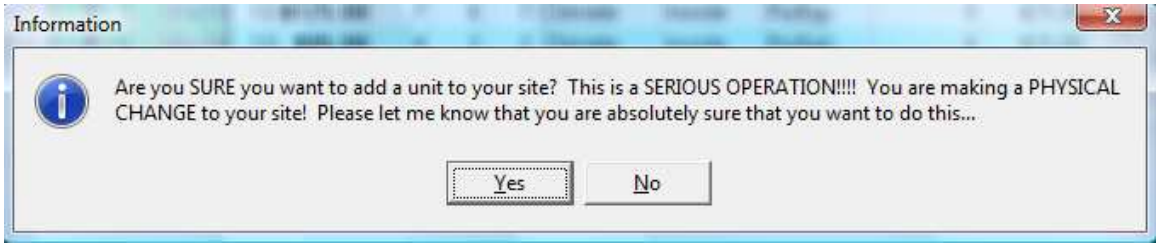
UNIT NUMBER

This will be the first item that you need enter in when you are adding units. Every time you add a new unit to your site, you must enter an alphanumeric unit "number" in the specified field. You will not be able to enter a number/letter that corresponds to a unit that has already been created. When you have entered a number/letter in the specified field click the ✓**OK** button.

UNIT TYPE

This window allows you to choose which type of unit you are adding to your site. Select the type from the list you created using the Unit Types screen and click on the ↖ Select button.

You will then see a window like this:



Click on the Yes button to continue with this change, or No to cancel this operation.

Once you have finished adding units click on the ✓ Save all changes and exit button.

HOW DO I DELETE AN EXISTING UNIT?

At times you may alter the configuration of your site and have damaged or unwanted units that you physically remove from your site layout. Or you may remove a wall between units, thus making the two units into one. If these situations you will need to delete the removed units from your existing dataset in QuikStor Express. Below is an explanation of how to do this.

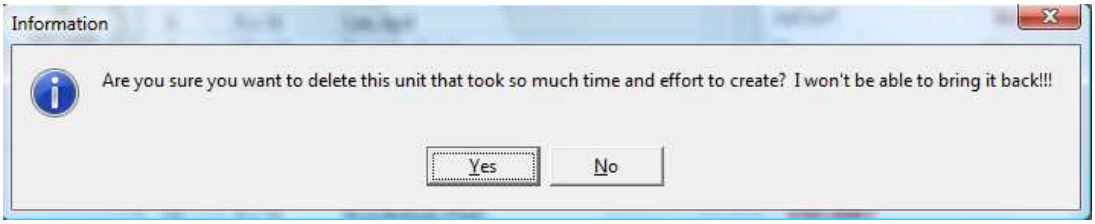
First, before you do anything in QuikStor Express that will alter the state of your data, you must go to File -> Backup Database to ensure that you have a current backup of your data.

Select the unit that you wish to delete, then click on the: 

button.

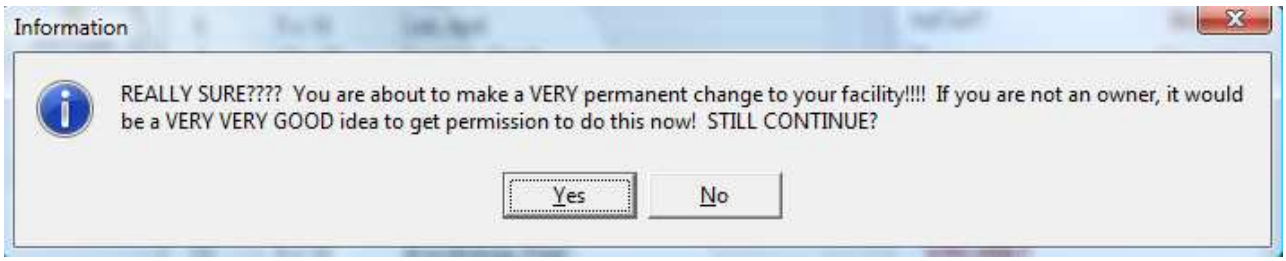
Note: You will not be able to delete any unit that is occupied, so if you wish to delete such a unit, you must first either transfer the existing tenant to a different unit, or move the tenant out.

Now if you are sure this is the unit you wish to delete and you clicked on the Delete Unit button a message will appear that looks like this:



Click on the Yes button to confirm the Delete, Click on the No button if you wish to return to the window you were working with before.

Just so QuikStor Express is absolutely sure that you want to perform this function another window will pop up saying:



If during the deletion process you are unsure on whether or not you want to delete a unit, please click on the No button and contact QuikStor Technical Support to make sure you are following the proper process for what you want to accomplish.

REVENUE OPTIMIZATION CENTER

This feature allows you to setup specials, promotions, and price levels at your facility.

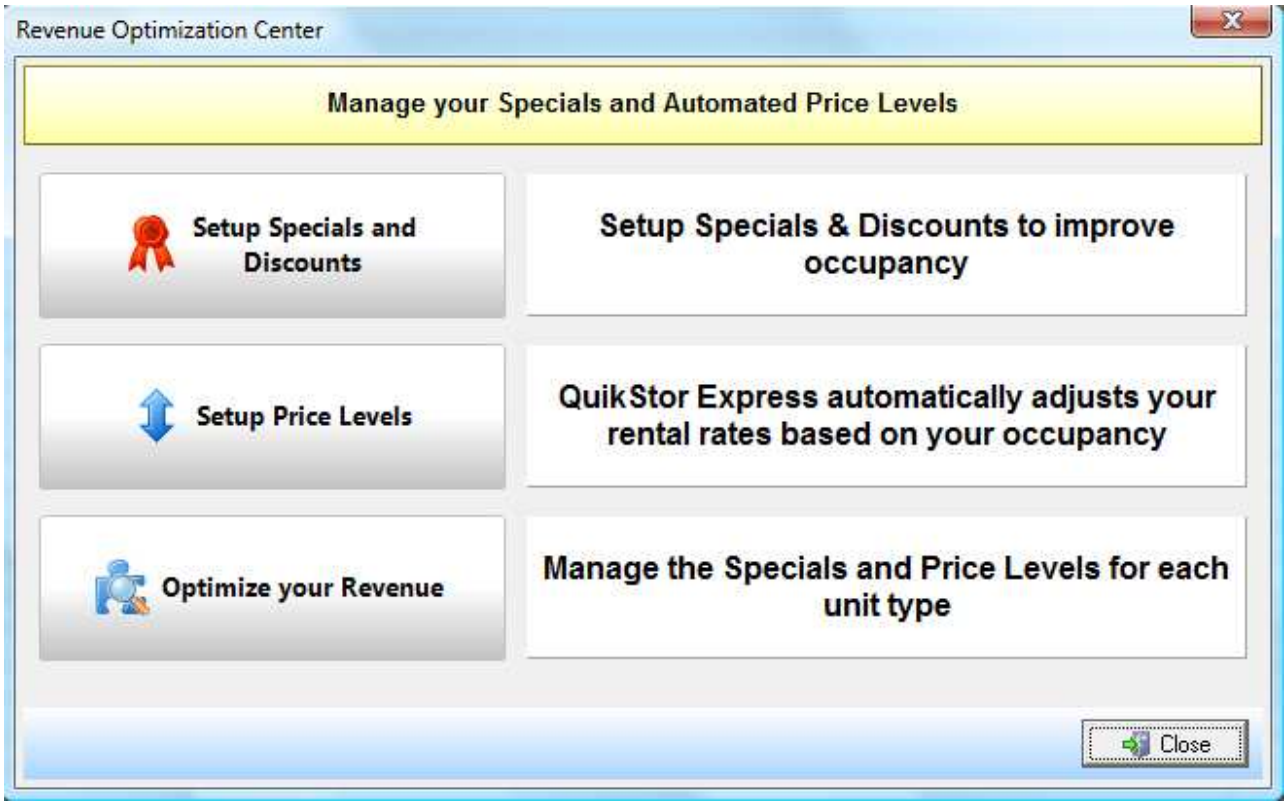
The Revenue Optimization Center is a central location for defining specials, setting up variable rent adjustments based on occupancy (price levels) and optimizing your specials & price levels by linking them together.

The Revenue Optimization Center can be found in various menus, including the Favorites tab and Marketing tab in Modern View (look for this button 

) or on the main toolbar you will find this icon  in Classic View.

Once you click on the Revenue Optimization Center button a window like the one below will be displayed. There are three main sections in the Revenue Optimzation Center:

- **Setup Specials & Discounts** – this is the section where you will define your specials
- **Setup Price Levels** – in this section you will define your variable rental rates and what criteria will be used to determine when a rent level for a given unit type will increase or decrease.
- **Optimize Your Revenue** – in this section you will see a summary of your specials & price levels, and how they are applied to unit types and eCommerce.



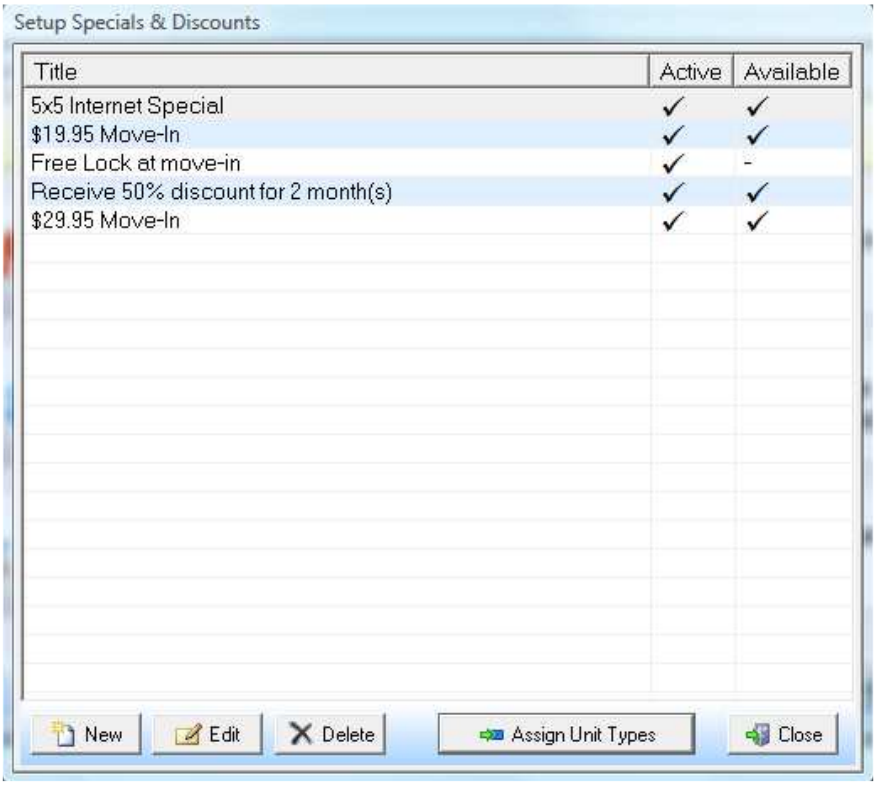
SETUP SPECIALS AND DISCOUNTS

Click the 

button to begin.

The following window shows you a list of current Specials that have been defined. On the right hand section of the screen you have two columns, “Active” and “Available”. If there is a checkmark in the Active column for a defined Special then that means that it is setup and ready to use as long as it is within the available date range. This allows owners to define many different Specials at one time with varying Available dates. If there is a checkmark in the Available column then it means that the Special is within the date range specified during setup and can be used by the manager during a move-in.

At the bottom of this box are buttons that allow you to create a New Special, Edit an existing Special, or Delete a Special. There is also a button that allows you to Assign Unit Types to a defined Special.



Let’s start by creating a new Special. Click on the 

button

The first thing you notice when you open the Specials Wizard is Merlin. Merlin is your assistant in the Specials process and will let you know if you missed a step or should add something that is missing.
If you would prefer to define your Special without Merlin’s help, you can hide him at anytime by right clicking on him and clicking, “Hide”.

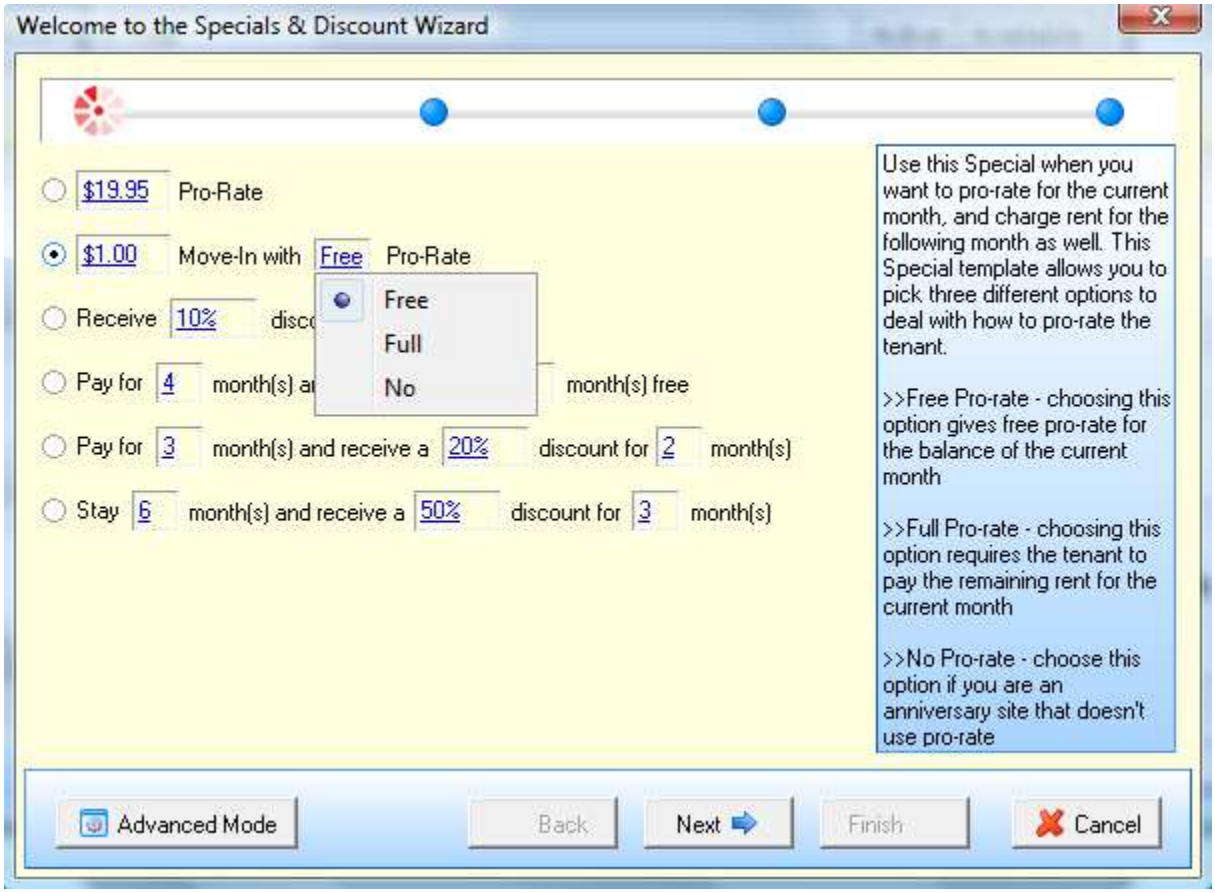
There are potentially four screens in the Specials wizard. We will walk through each screen and how to define a given special using the wizard.

For this exercise we will create a $1 Move-In Special, which includes a free lock.

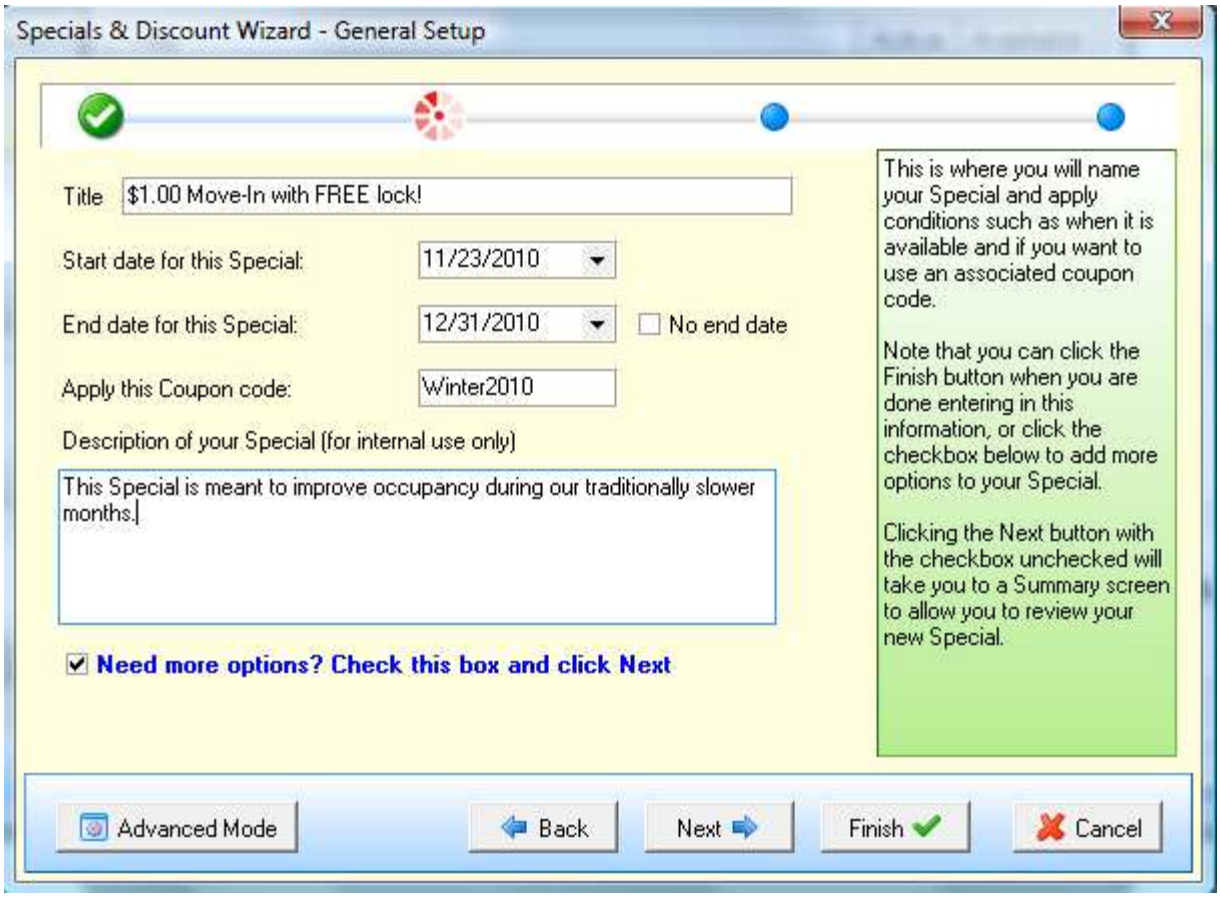
On the right hand side of each of these screens will be a Help section that will assist you in defining your Special.

The first thing to do is to select the foundation of your new Special, in this case we will select the second option which gives us a $1.00 Move-In with Free Pro-Rate. As you can see on the screen below you also have the option to charge the full amount for the Pro-Rate or to not Pro-Rate at all. Click the Next button to move to the next section of the wizard.

Anywhere you see an underlined blue number or word, you will be able to modify it to best suit your needs.



On the next screen you will give your new Special a title; in our scenario we will name our Special, “$1 Move-In with FREE lock!”.



You will see a progress bar at the top of this screen that shows your progress through the wizard.

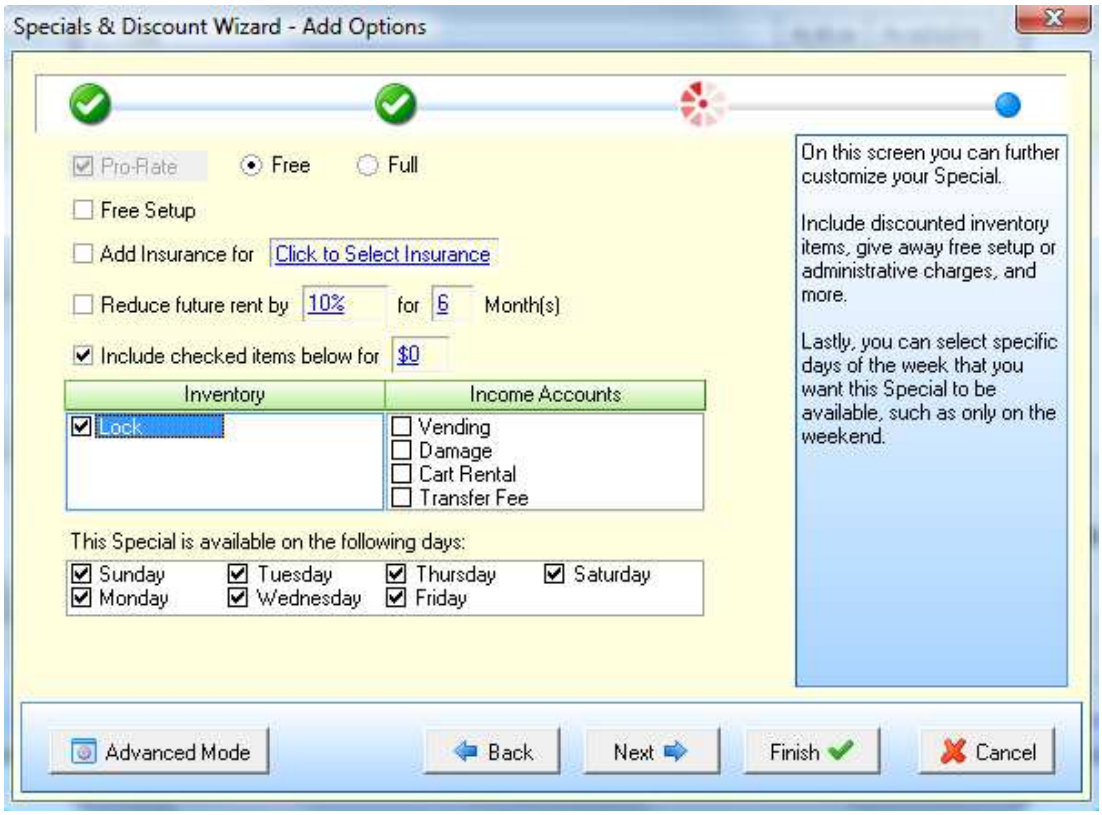
After you enter your title, you need to set a Start date and End date for your Special. This is the date range that will determine when the Special is available for the manager to use in Express or when it is available in eCommerce. If you do not want to select an End date, check the “No end date” box.

Next you can enter a Coupon Code. The Coupon Code that you enter here can be used in eCommerce. For example, if you advertise in the Yellow Pages and offer a Free lock if you enter promo code FREE you could create that Special using that Coupon Code, and when a prospect goes online to rent their unit they would enter FREE on the checkout screen to receive their free lock. This allows you to target your advertising dollars to the most lucrative places. This is an optional field.

Below that is a Description box that allows you to enter notes about your Special. This is for internal use only and is not shown elsewhere online or in Express.

Lastly, you have the choice to conclude your Special and click Finish or to check the “Need more options?”checkbox and continue adding options into your Special.Since we are adding a free lock to our special, we will check the box and click the Next button.

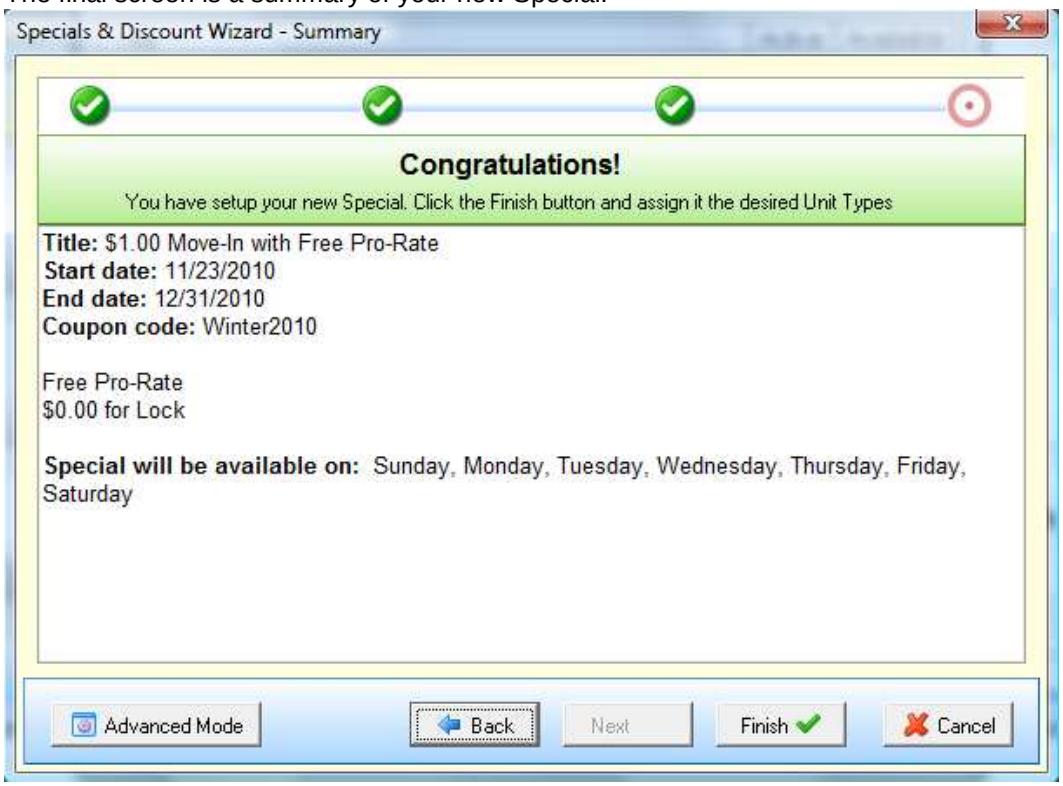
On the next screen you will select additional options for your Special.

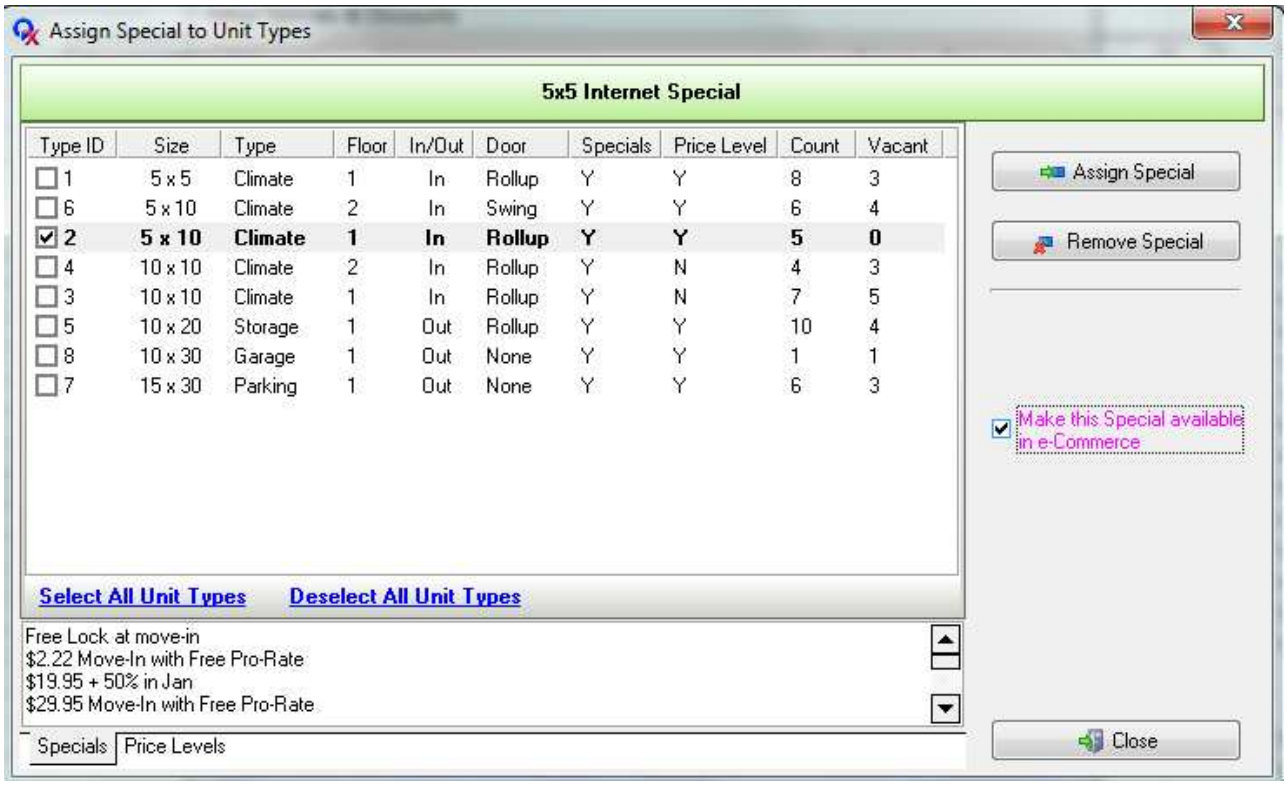


Here you add more options to your new Special, including how to handle pro-rate, setup fees, or adding insurance or inventory with the Special.

You can also set which days of the week you want this Special to be available for, in case you want to have just a weekend special or push a special on a traditionally slow day of the week.

The final screen is a summary of your new Special.





On this screen all of your unit types are listed with checkboxes to the left of the size. You can select unit types individually or click the “Select All Unit Types” text.

There are also two columns after the unit description called, “Special”and “Price Level”. A “Y” in the column means there is already a Special associated with the unit type (which is ok, you can have as many specials for a unit type as you wish) and a “Y” in the Price Level column indicates that there is already a Price Level associated with this unit type. You should only have ONE price level per unit type setup to prevent confusion; however you are permitted to set up multiple price levels to account for various occupancy rates.

At the very bottom of the screen you will see a Specials and Price Levels tab. When you click on a specific unit type any associated Specials or Price Level’s will appear in this box.

Once you select your unit types, click the 

button to complete the assignment. If you wish to offer this Special through eCommerce, check the “Make this Special available in e-Commerce” box. Click Close when you are done to finalize your new Special!

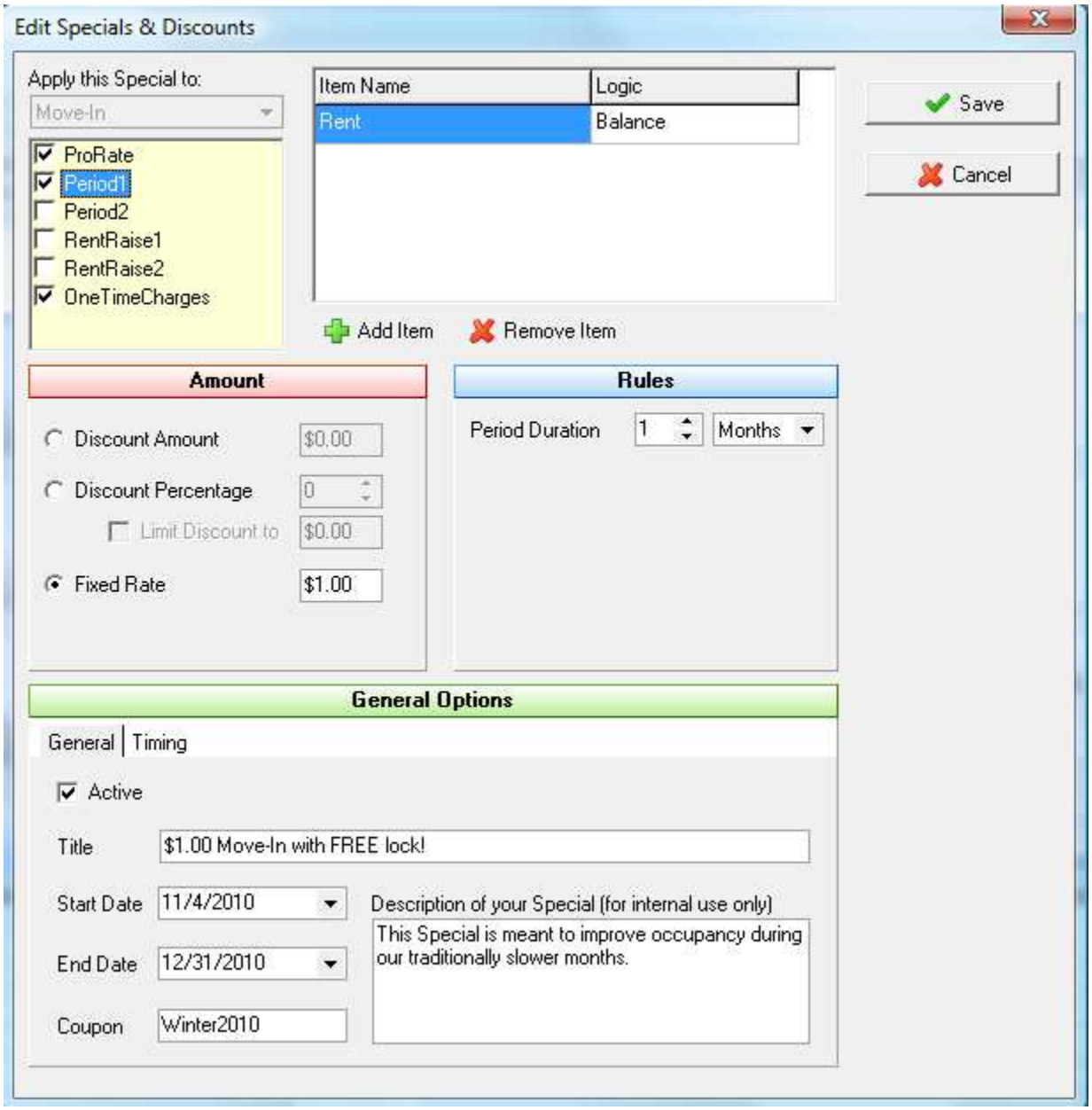
Only one Special can be assigned, per unit type, in eCommerce. If you already have a Special assigned to a unit type for eCommerce, and you assign a new one, it will overwrite the original one. If you use Coupon Codes you can have as many Specials as you want in eCommerce, but only the latest one assigned will display on the main rental/reservation pages.

EDITING A SPECIAL AND ADVANCED MODE

If you need to edit your Special you can click the Edit button on the Special list screen. The following screen will come up with the existing information defined in your Special. In this case we will continue with our $1 Move-In with FREE lock! Special.

If you are clicking the Advanced Mode in the beginning of the Special wizard the information below will be blank and you can create your own Special based on any criteria you wish instead of using the template wizard options.

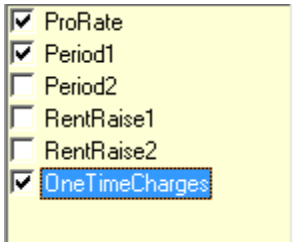
At first glance this screen may look scary with all of the options, but once you go through it you will see that not only is it easy to use, but extremely powerful!



Let's start by explaining each of the sections on this screen.

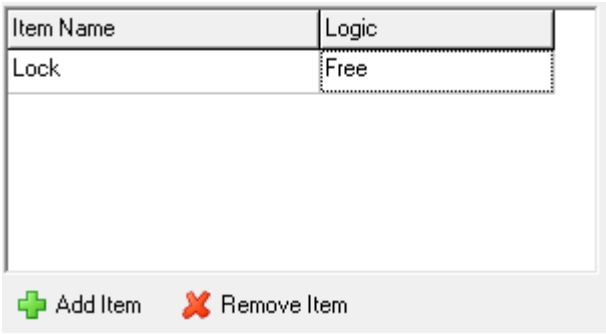
At the top left it says, "Apply this Special to" with the word Move-In grayed out. The current implementation of this Advanced section will only apply to Move-in Specials, but a future update to Express will unlock "Payment" mode allowing you to create Specials that can be applied during a payment.

Below that is a box with six checkboxes. Each one opens new options on the rest of the Edit screen, depending on which one is clicked. Let's walk through each option:



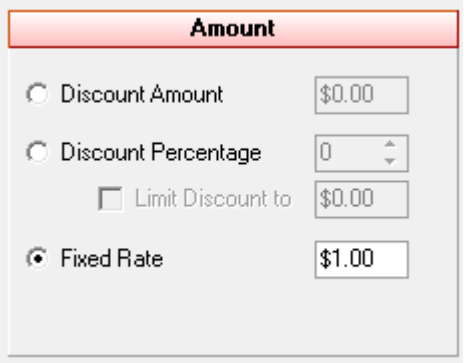
- **ProRate** – check this box if you want your Special to handle pro-rated rent, such as providing a free pro-rate to the first of the month
- **Period 1** – check this box if you want to discount to otherwise adjust the rent for the amount of time directly following the move-in date, such as the first month. Any amount in Period 1 will be due during move-in.
- **Period 2** – check this box to adjust rent for the period following period 1. For example, if you were giving one month free (period 1) followed by one month for 50% off (period 2). Any amount in Period 2 will be due during move-in.
- **Rent Raise 1** – Rent Raises occur at a later date, and are not due at the time of move-in. For example, if your Special is "Stay for 12 months and receive 1 month free" you would use Rent Raise 1 to give that 13th month free since you are not collecting the 12 months of rent up front as you would using Period 1.
- **Rent Raise 2** – this option is for rare circumstances where you would want to have a second rent raise.
- **One Time Charges** – check this box if your Special will include one time charges, such as a lock.

To the right of the checkboxes is a logic box. This is where you define how certain items (rent, monthly charges, inventory, etc) are handled by the Special.



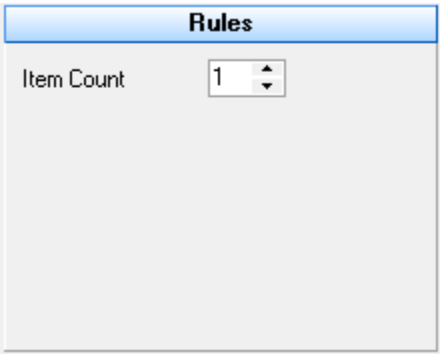
In our Special we are providing a free lock along with our $1 move-in. So when you click the One Time Charges checkbox, this box will show you the Item Name (Lock) followed by the Logic (Free).

The middle left box with the red header titled, "Amount" is where you put the actual discounted rate.



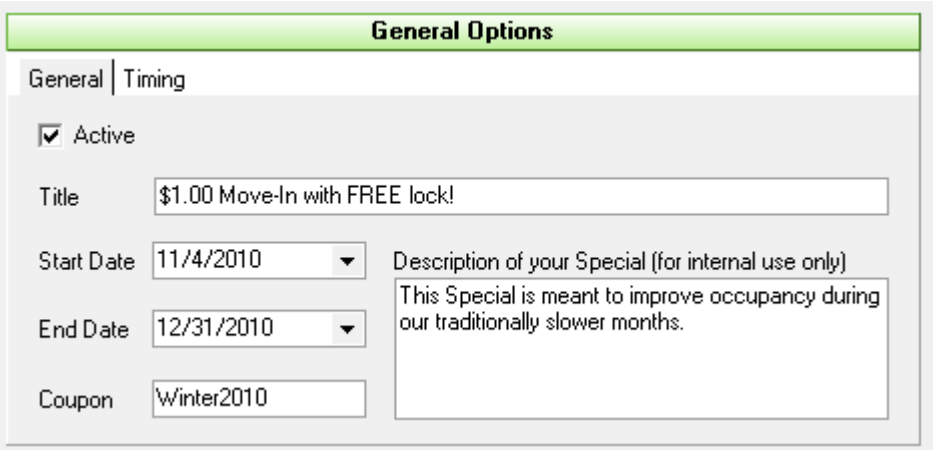
You can enter a discounted amount, a discounted percentage with or without limitation (for example, 50% off of rent but the dollar amount cannot fall below $75 dollar), or a fixed rate.

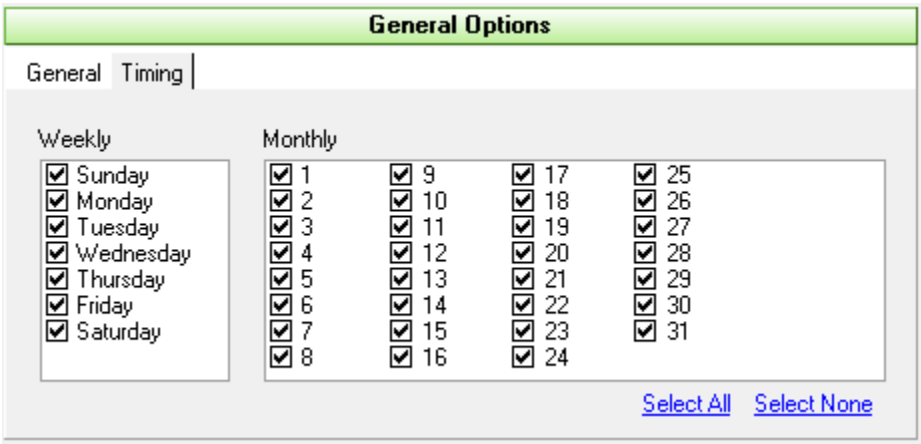
The box to the right of the Amounts box is the “Rules”box and this defines quantities of an item (like in the our free lock example below) or the duration of a given period.



The last box on the screen is where you enter in the general information about the Special. Here is where you add the title, start and end dates, coupon code (if applicable) and a description of the Special. If you want this Special to be active, check the “Active” box.

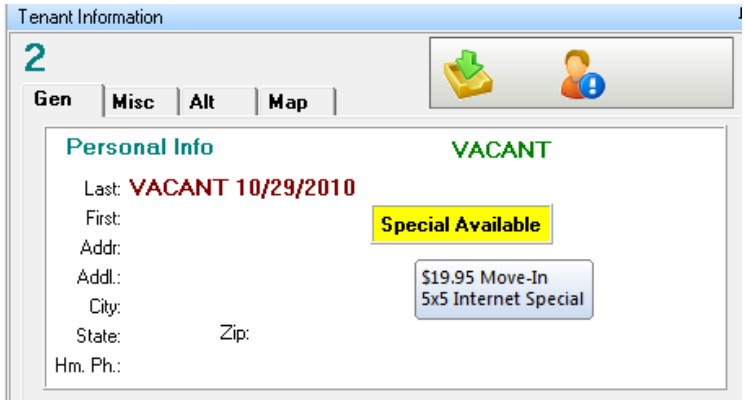
There is also a “Timing” tab that allows you to set which days of the week the Special will be available. On the Timing tab you can also designate specific calendar dates in a given month, for example if you only want the Special to be available on the last day of each month.





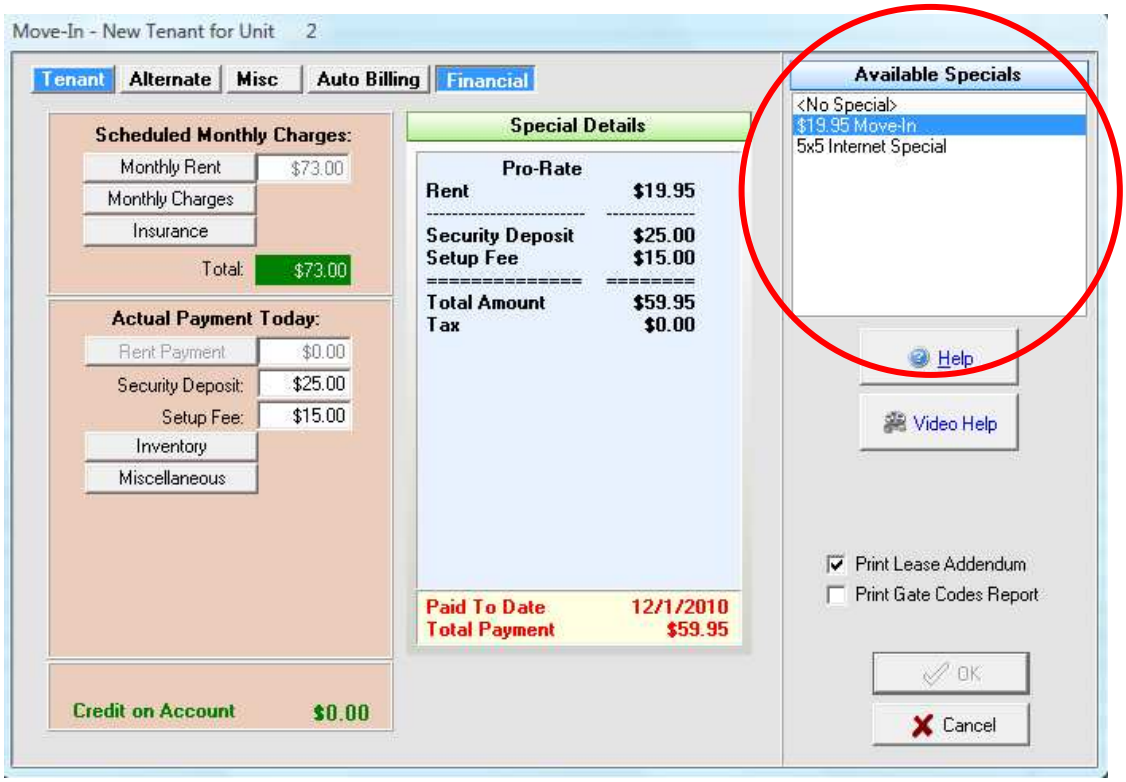
USING A SPECIAL DURING A MOVE-IN

Once you create your new Specials you can start using them in everyday operations. From the main page a manager can quickly see if a Special is available for a selected vacant unit as there is a yellow box saying, "Special Available" in the Tenant Information box.



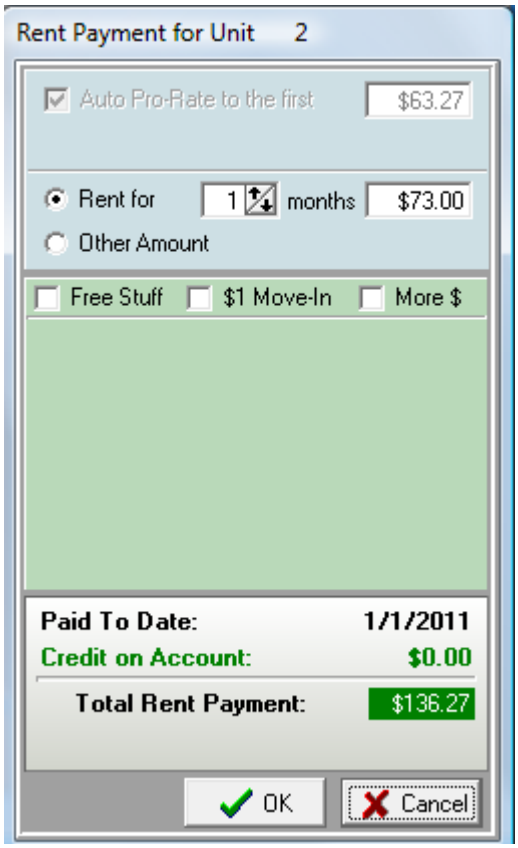
If you mouse over the yellow box it will provide you the titles of each Special that is available for that unit.

Proceed with the move-in process as normal, filling in all tenant information until you get to the Financial tab. On the right hand side of this tab you will see a box called, "Available Specials". Inside of this box will be all of the associated Specials for this unit. At the top is something called <No Special>, you will click on that if you accidentally click a Special and then realize that you do not want to apply a Special.



When a Special is selected the details of that Special are displayed in the center of the form as shown in the above screenshot.

You can easily add additional monthly charges, insurance, or inventory to the Special as you would during a normal move-in.

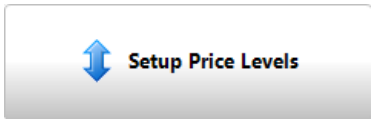


If no Special applies to the move-in you are performing, but you wish to give reduced rent, a free item in inventory, etc you can always do so by clicking the 

button. This will bring up the box below where you can adjust the move-in amount or give specific discounts.

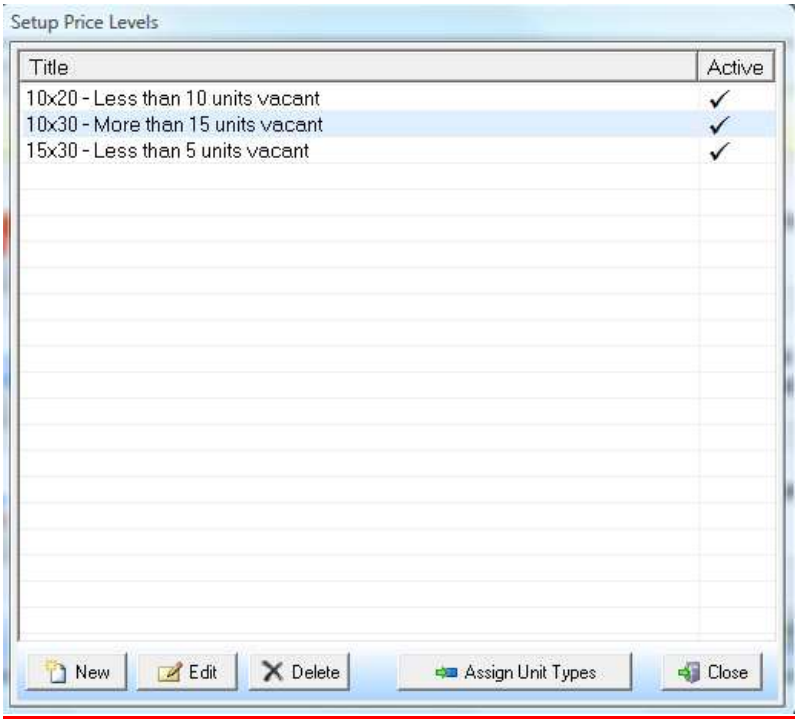
PRICE LEVELS

A Price Level is an automated adjustment to the rent, either an increase or decrease, based on occupancy level. When setting up a Price Level you will enter certain conditions that must be met before the rent change will take affect, such as only having a certain number of a given unit type left to rent.



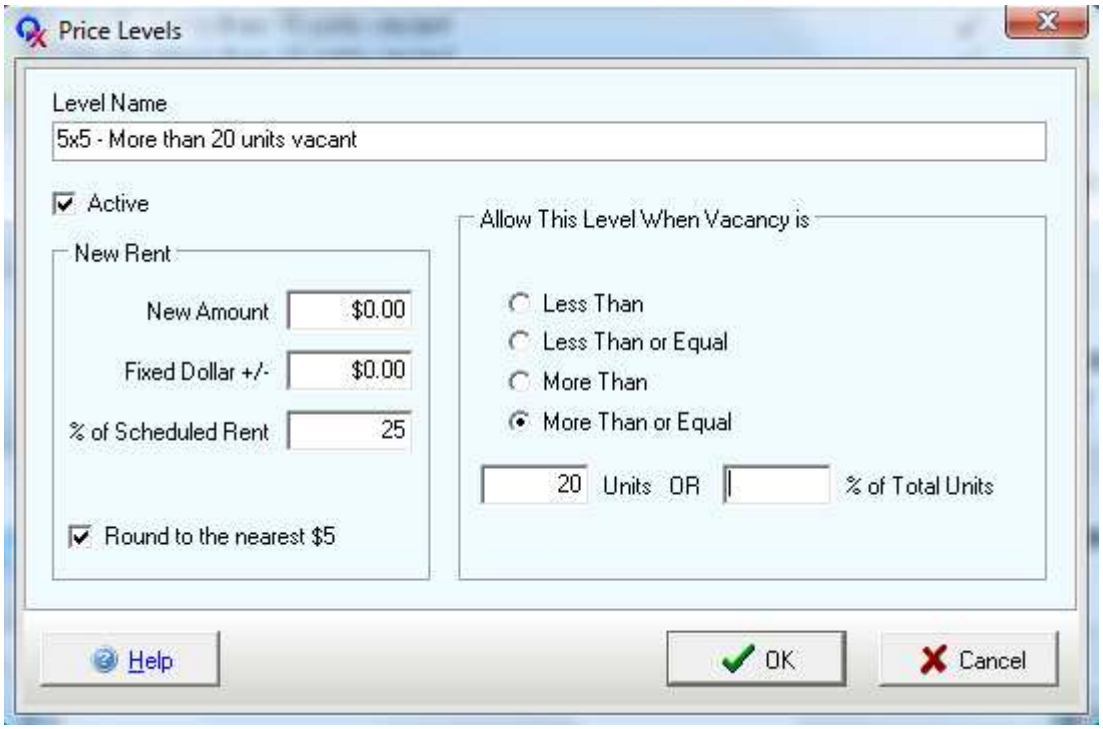
To start setting up your Price Levels, click on the Revenue Optimization Center and click the “Setup Price Levels” button that you see on the left.

You will notice that the list screen looks very similar to the Specials list screen. It shows the Title of each created Price Level as well as if it is Active or not.



Note that having a Price Level marked as Active does not necessarily mean that the condition of the Price Level is currently being met. It just means that the Price Level has been activated and that when said conditions are met the adjusted rental rate will take affect. If you wish to deactivate a Price Level, but keep it for later use, simply uncheck the “Active” box in the next screen.

Click the New button to start creating your first Price Level. You will see the following screen come up.



At the top of this screen you will enter a name for you Price Level, for our example we have named it “5x5 – More than 20 units vacant”. It is best practice to name your levels something descriptive.

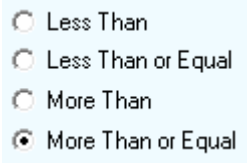
You will see the Active checkbox below the title box, this is marked by default. If you wish to create a Price Level for future use, uncheck this box.

Now you need to decide what the new rent will be when the condition is met. In the “New Rent” box you have three options:

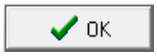
- **New Amount** – here you can select a new dollar amount when the condition is met. For example, if you the scheduled rent is $50, you can enter $40 in this box and the new rent will show as $40 whenever your condition is met.
- **Fixed Dollar +/-** - selecting this option allows you to do a fixed dollar amount. For example, if you wanted to raise the rent from $50 to $60 when your condition was met you would enter $10 in this box. To lower the rent you would enter -$10.
- **% of Scheduled Rent** – choose this option to increase or decrease the scheduled rent by a given percentage when a condition is met. This is a popular option when you are assigning a Price Level to multiple unit types.

Many owners like their rental rates to be round numbers, because of that we have added a “Round to the nearest $5” checkbox that will automatically round to the nearest $5 multiple.

The last section is where you set what conditions must be met in order for the Price Level to go into effect.



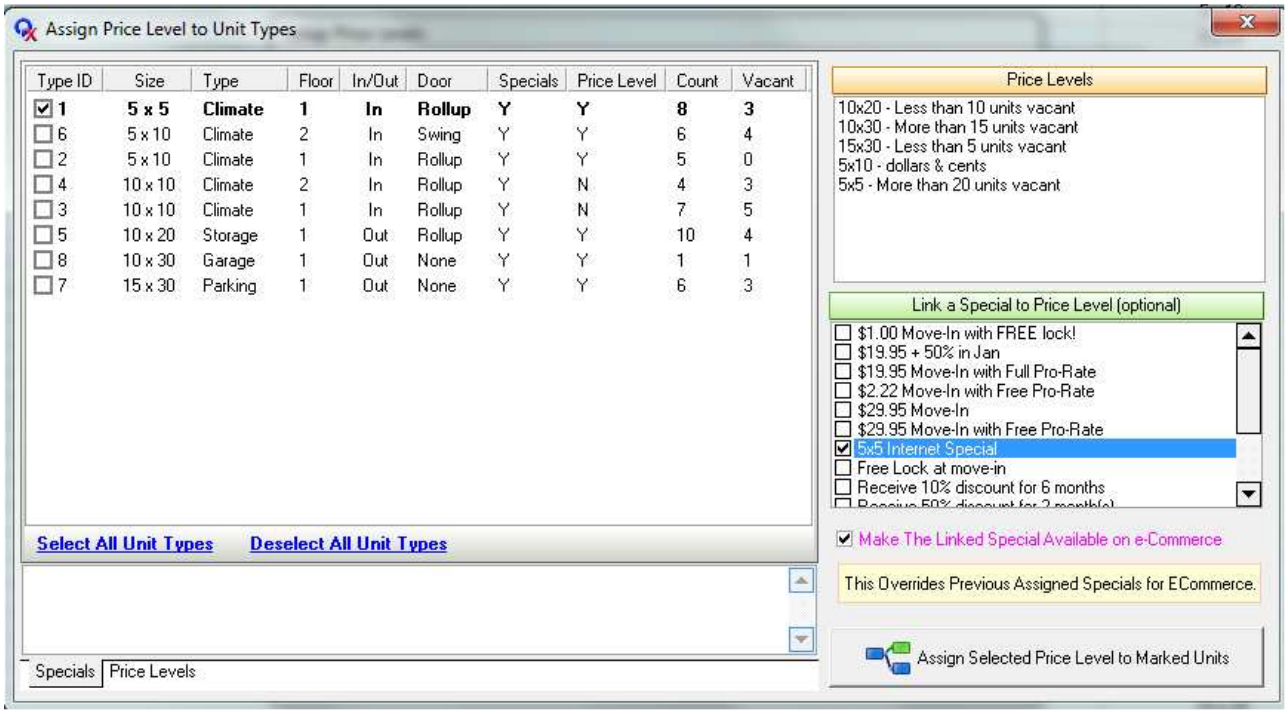
Choose your desired option above and then enter the number of units or a percentage of the total units at your facility as shown below.

Click the 

button to complete your Price Level. Next we will assign your new Price Level to unit types.

Click the 

and you will see the following screen. This process is very similar to assigning Specials to unit types.



On this screen all of your unit types are listed with checkboxes to the left of the size. You can select unit types individually or click the “Select All Unit Types” text.

There are also two columns after the unit description called, “Special”and “Price Level”. A “Y” in the column means there is already a Special associated with the unit type (which is ok, you can have as many specials for a unit type as you wish) and a “Y” in the Price Level column indicates that there is already a Price Level associated with this unit type. You should only have ONE price level per unit type setup to prevent confusion; however you are permitted to set up multiple price levels to account for various occupancy rates.

At the very bottom of the screen you will see a Specials and Price Levels tab. When you click on a specific unit type any associated Specials or Price Level’s will appear in this box.

On the right side of the screen you have two boxes, one called, “Price Levels” and the other called, “Link a Special to Price Level (Optional). You can choose to link a Price Level together with a Special. By doing so the selected Special is only available if the Price Level condition is met. For example, you may want to create a Price Level when your inventory of 5x5 units gets to be too large, in addition you may want to create an Internet Special in eCommerce to really push 5x5 units. By linking these two together the process is automated based on your occupancy/vacancy levels.

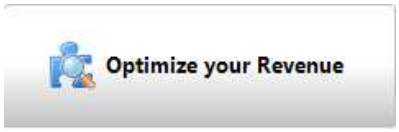
If you wish to make your Linked Special available in eCommerce you need to check the the “Make the Linked Special Available in eCommerce”.

Once you select your unit types and linking options, click the 

button to complete the assignment. Click Close when you are done to finalize your new Price Level!

OPTIMIZE YOUR REVENUE

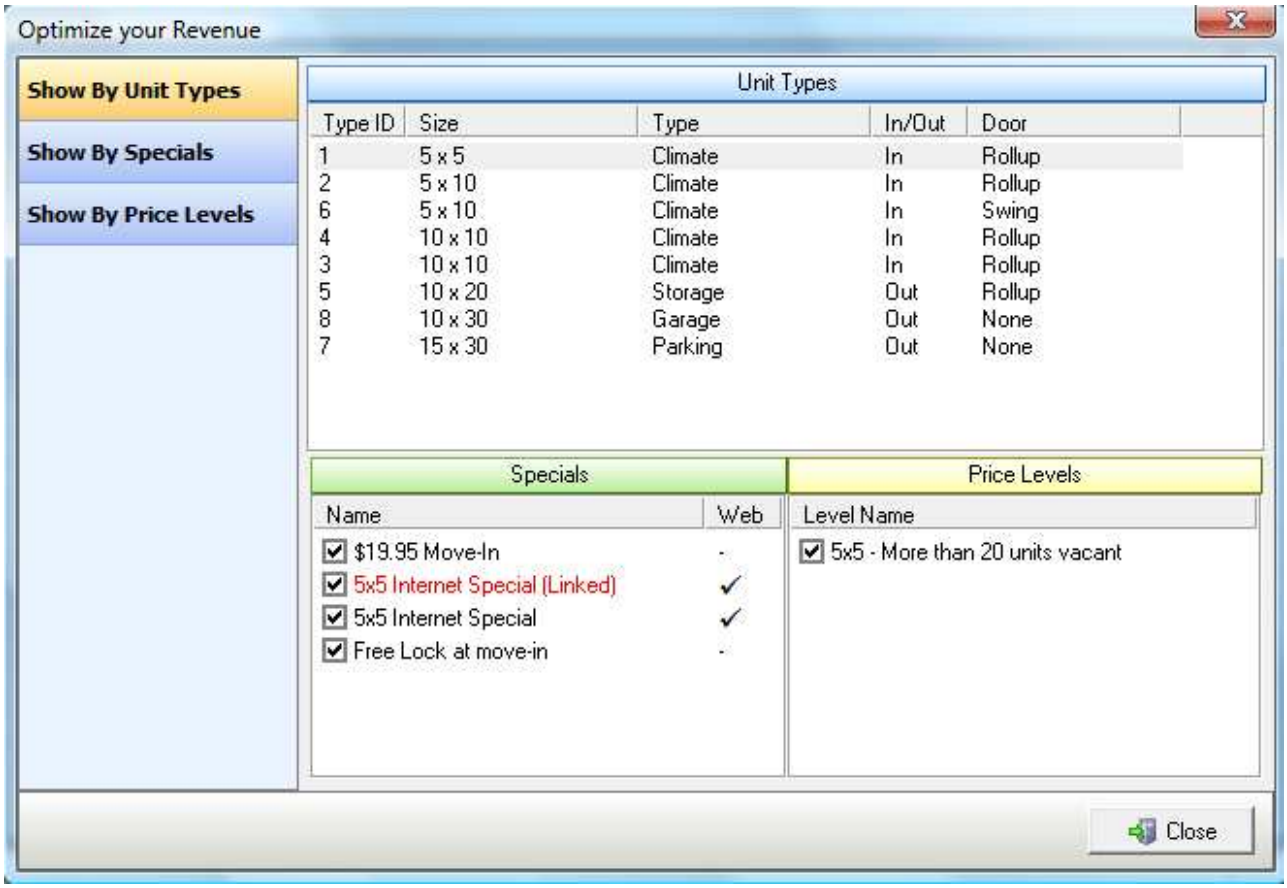
At anytime after setting up your Specials and Price Levels you can return to the Revenue Optimization Center to optimize your settings.



Click the “Optimize your Revenue” button as you see on the left to review your Specials and Price Levels.

The screen below will come up allowing you to see which Specials and Price Levels are associated with each unit type. In addition it will show if the Specials are available online using the eCommerce module.

You can sort this screen by Unit Type, Special, or Price Level.



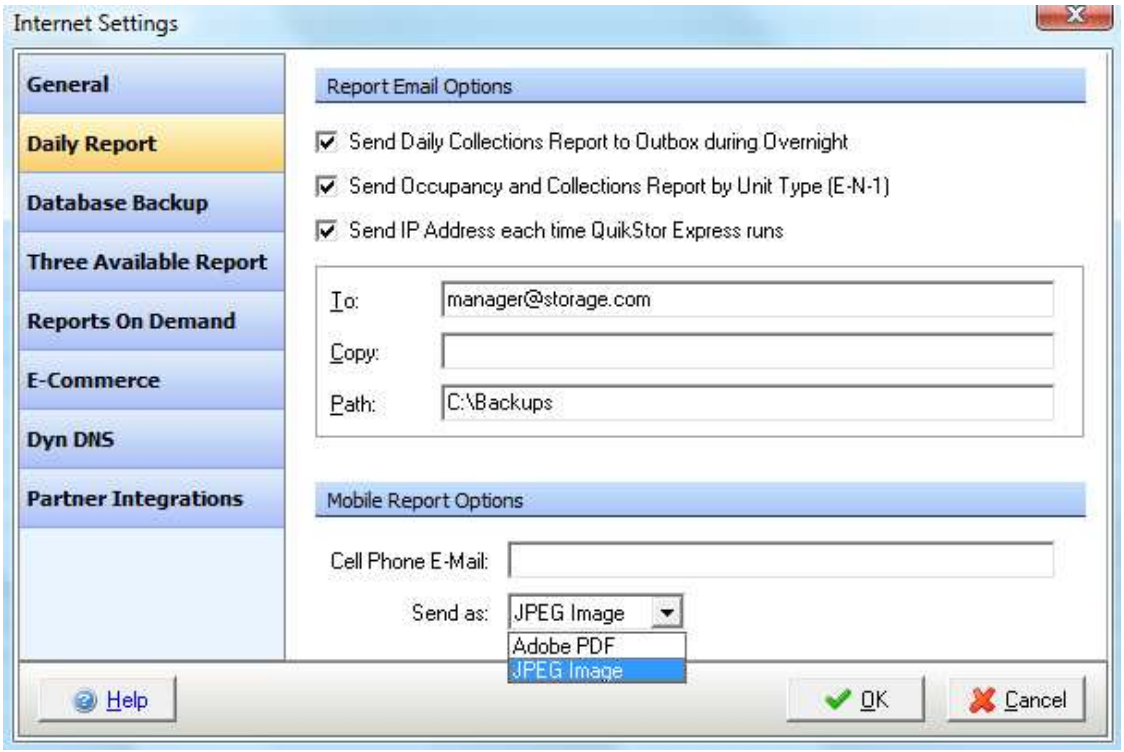
Internet Setup

QuikStor Express has several features that make use of e-mail, such as sending a home office a copy of your daily report, sending a copy of your database backup to an offsite location, or to QuikStor Technical Support for diagnosis. In order to make use of these features, you will need to set up Express to do so.

NOTE: the setup screen will look different depending on whether or not you have purchased the Outlook Integation Module. Setup procedures for each method are listed below:

To get to this section go to File -> Internet Setup menu on the tool bar and click Internet Setup. You should see a screen that looks like this:

OUTLOOK INTEGRATION MODULE SETUP



There are three tabs that allow you to setup what is sent during overnight processing: Daily Report, Database Backup, and Three Available Report.

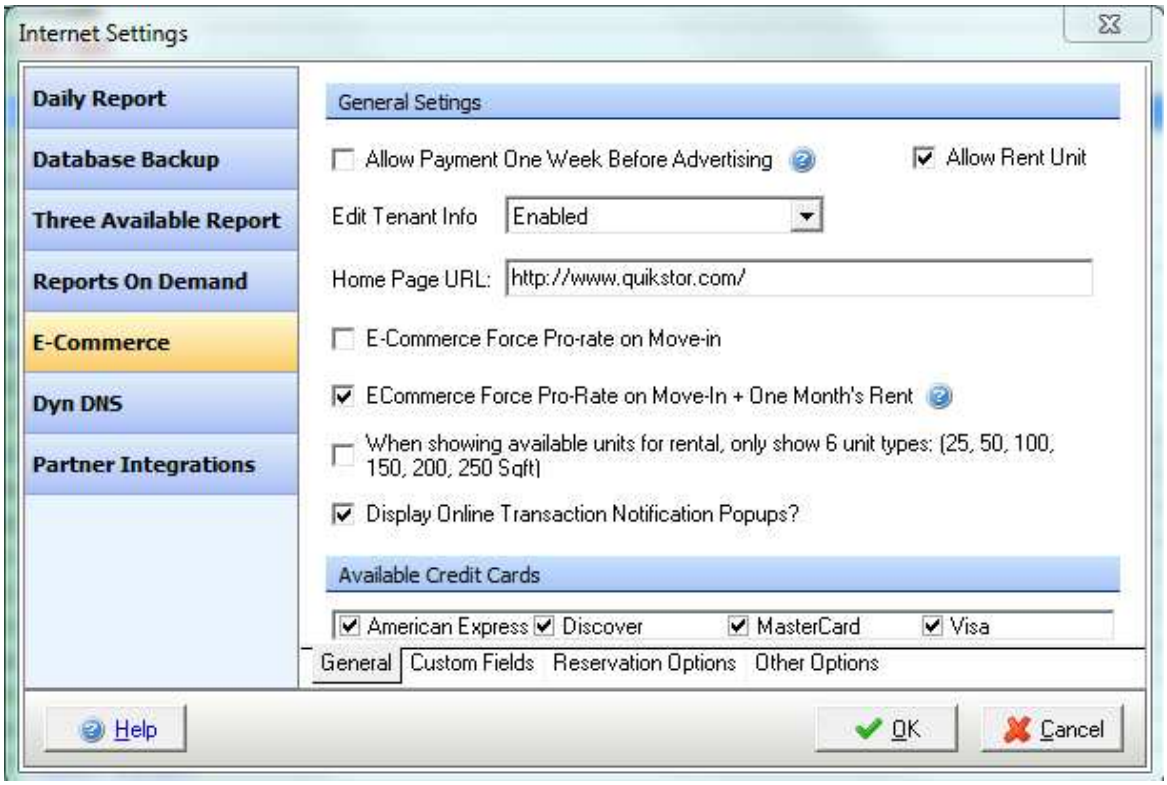
On each tab you can set up either the email address that you want it sent to or you can input a specified path that you would like the report or backup saved.

Under the heading of Daily Report there is also a check box to Send IP address during Startup. If this is checked it will send the current IP address of your computer to whatever email address is in the TO: line. This is only for use if you are having this computer connect to you through out the day.

The last tab in this section is the Reports On Demand tab that allows you to input an email address that will automatically come up whenever you manually email a report from within the Express program.

Mobile Reporting Users Only: At the bottom of the Daily Report tab is where you will set your Mobile Reporting parameters. Mobile Reporting allows an owner to have these reports emailed directly to their

Smart Phone via Adobe PDF or JPEG formats. Contact your QuikStor Account Representative if you would like more information on upgrading to Mobile Reporting.



<u>eCommerce Users Only</u>: there are three additional tabs on this screen if you have purchased the eCommerce module for online reservations, rentals, and payments. They are E-Commerce, Dyn DNS, and Partner Integration.

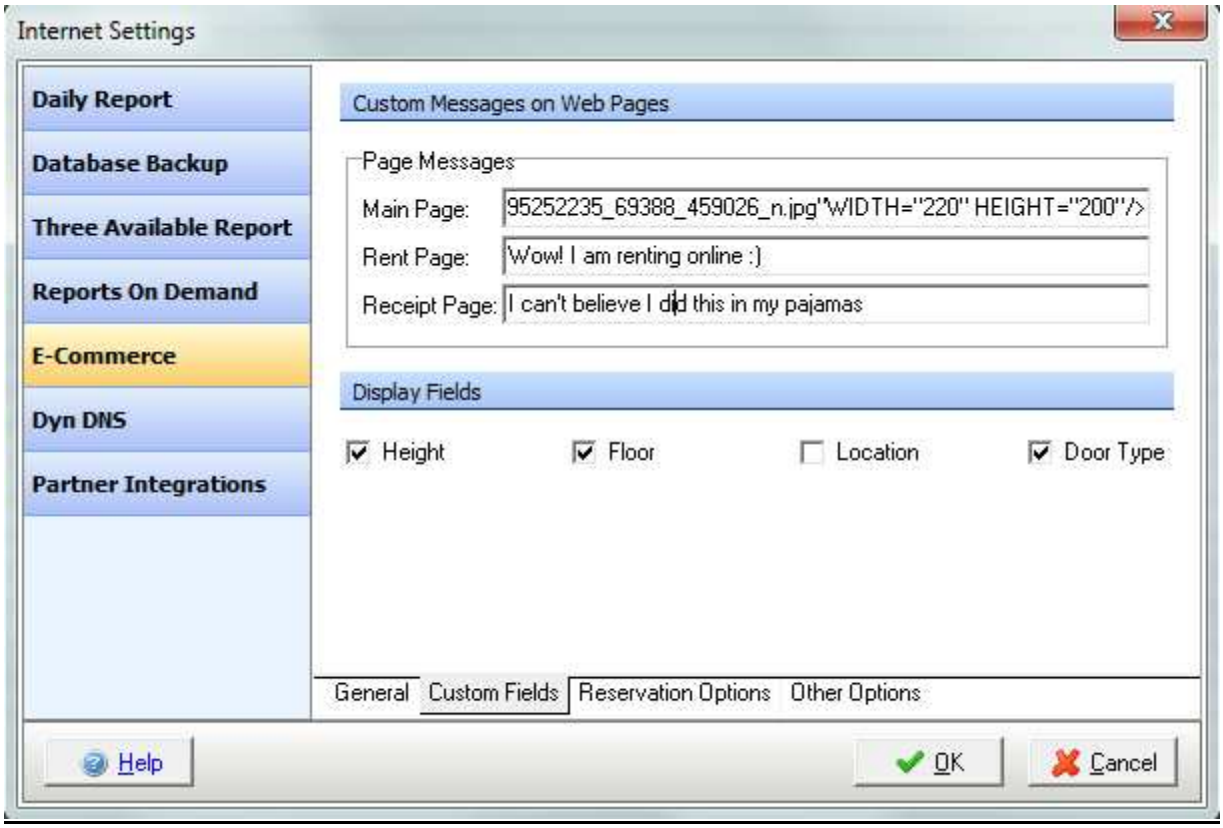
The E-Commerce tab allows you to set all of your online variables including:

- **Allow Payment One Week Before Auction** – if this is checked then someone a week before auction can still make a payment on their delinquent unit.
- **Allow Rent** – if this is unchecked the *Rent Unit* tab in the eCommerce pages will be hidden
- **Edit Tenant Info** – there are three options on the drop down menu: Enabled, Enabled Only for Blank Fields, and Disabled. If a tenant is delinquent, regardless of this setting, they will not be able to edit their information.
- **Home Page URL** – enter the website address for your home page here
- **E-Commerce Force Pro-rate on Move-in** – if this is checked the tenant's payment will pro-rate to the beginning of the next month.
- **E-Commerce Force Pro-rate on Move-in + One Month** – if this is checked the tenant's payment will pro-rate to the beginning of the next month, plus all of the next month. For example if a tenant rented a unit online on October 25, the Paid-to-Date would be December 1st.
- **Only show 6 unit types** – if this is checked the eCommerce site will only show the six most common unit types. This is usually only picked if you have many different unit types and want to simplify it for your prospective tenants.
- **Display Online Notification Popups**? – if checked a notification will popup in QuikStor Express each time a payment, reservation, or rental is made outside of Express. This includes eCommerce, kiosk, a callcenter, or online listing service such as Sparefoot.com.
- **Available Credit Cards** – check which credit card types you will accept. Those checked will be the only options available online.

Custom Fields Tab:

Under this tab you can set custom messages, logos, or pictures for the Main Page, Rental Page, and Receipt Page.

This is also where you will select which unit information you wish to display on the rental and reservation pages.



Reservation Tab:

There is an entire tab dedicated to how reservations can be enabled online. The two most important questions you need to answer is 1) should reservations be enabled, and 2) what are you going to charge for that reservation?

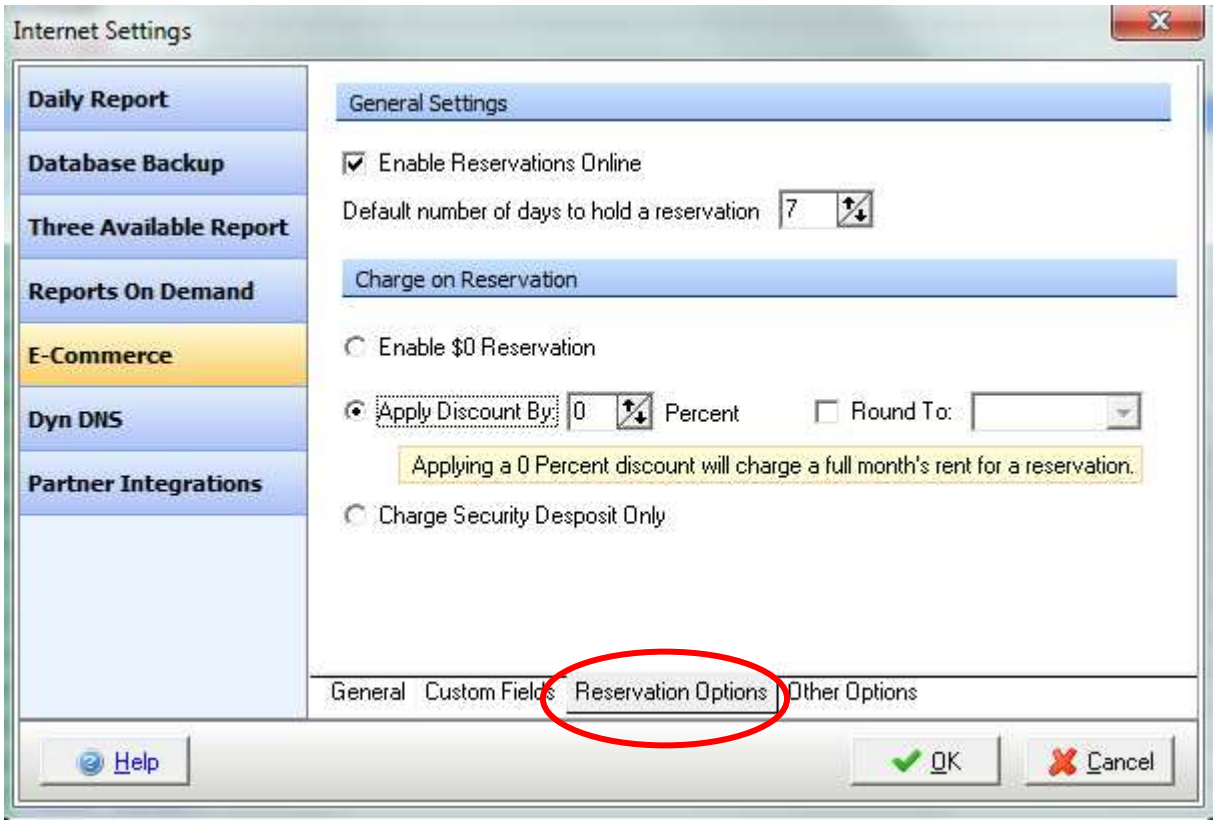
If you want to enable reservations, simply check that box on this screen. If left unchecked the Reserve a Unit tab in eCommerce will be hidden from a prospective tenant.

NEW You can set the number of days you want the reservation to be held when a prospect reserves online. This information will be shown on eCommerce screens and the reservation confirmation that the tenant receives.

Next select what a tenant will pay to reserve a unit. You have three options:

- **Enable $0 Reservation** – as the name implies, a tenant can reserve a unit with no obligation or deposit required

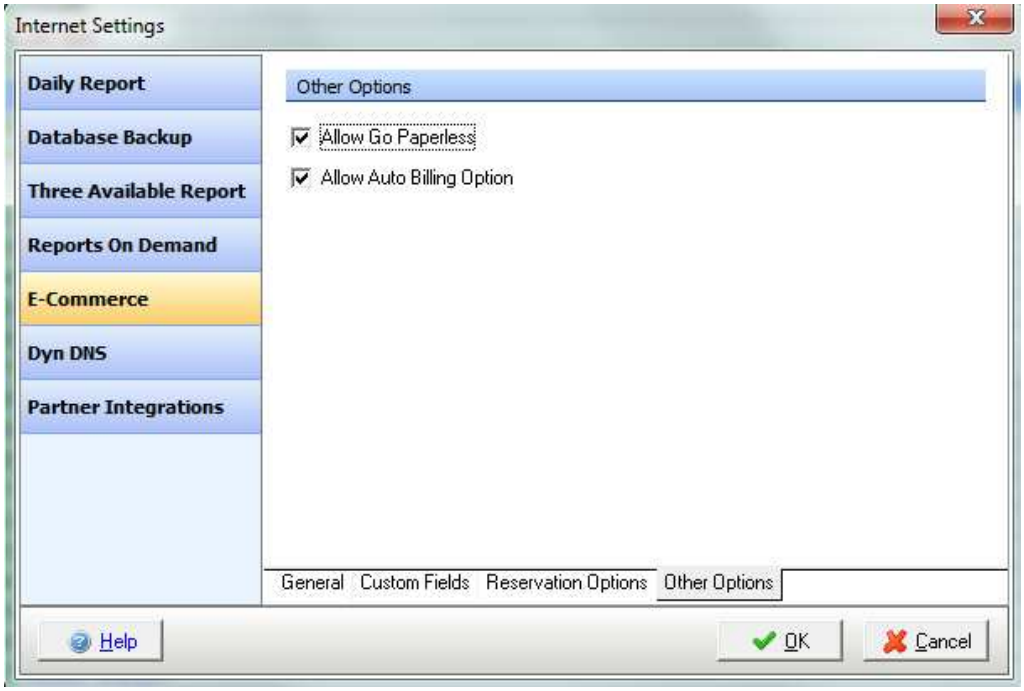
- **Apply Discount by XX Percent** – selecting 100% would be the same as a $0 reservation. Selecting 0% would be the same as reserving the unit for the full month's scheduled rent. You can also set this to round to the nearest $1 or $5 based on your preferences.
- **Charge Security Deposit Only** – you can assign a different Security Deposit for each unit type. Some facilities use this as the reservation deposit as well, so QuikStor has provided this option for you to use.



Other Options Tab:

This section is where you will set up options available to you in the eCommerce module. The two settings on this tab are:

- Allow Go Paperless - this allows tenants to choose to have their invoices emailed to them instead of mailed.
- Auto Billing - a tenant can now choose to go on auto billing when they make a payment online. The option also allows new tenant's to choose auto billing during the online move-in process.



Reset Web Password button:

On the Tenant tab there is now a Reset Web Password button. Once you select the tenant that you want to reset the password for, click this button and it will have a series of confirmation boxes that you must click OK in order to reset the password back to the tenant's gate code. This only applies if you are using the QuikStor eCommerce module.

DynDNS Tab

The Dyn DNS tab allows you to use the Dyn DNS service to simulate a static IP address without incurring the cost associated with a static IP address.

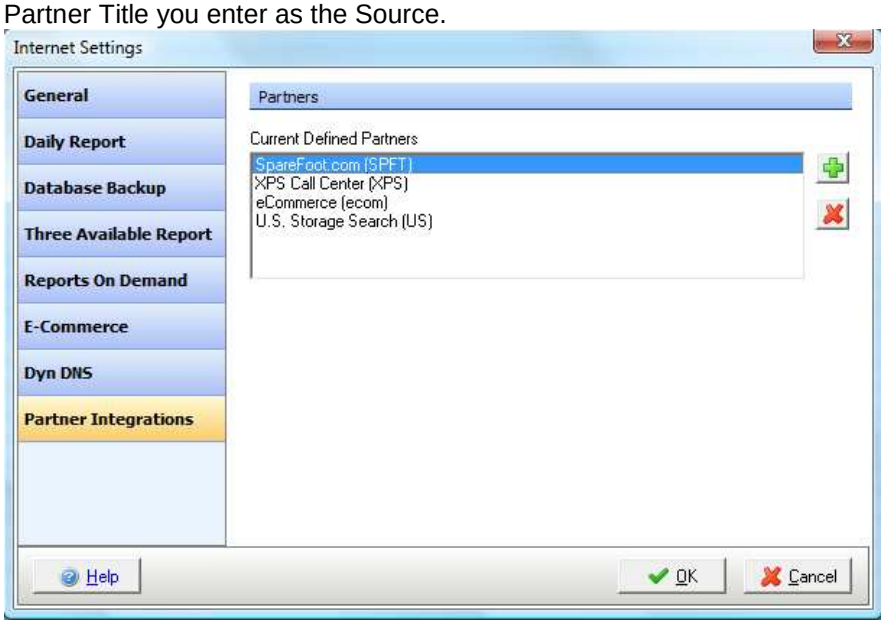
Enter the link provided to you by QuikStor Technical Support or from your IT Professional.

Partner Integrations

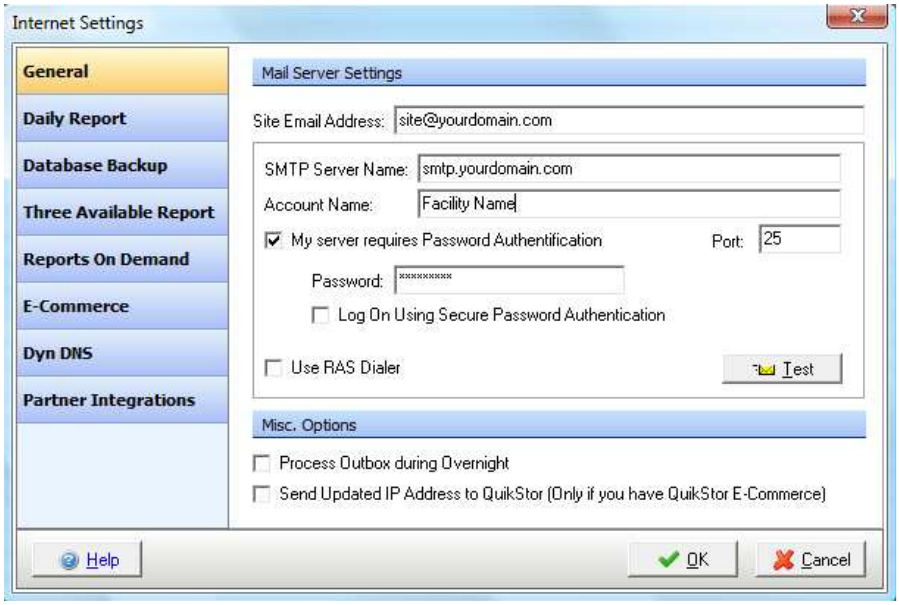
QuikStor integrates with most of the leading online companies in the self storage industry. These companies offer online listing services, call centers, kiosks, etc.

Each facility must be using either eCommerce or the SmartClient Enterprise software to integrate Express with these services.

On this tab you will setup a username & password for each of these services to securely connect to your database remotely. All online reports, such as the O-R-R (Online Reservations & Rentals) will list the Partner Title you enter as the Source.



NON-OUTLOOK INTEGRATION SETUP



If you do not have the Outlook Integration Module installed you will need to set your email client parameters directly into Express.

The only difference between this setup procedure and the one listed above is that there is now an additional tab named, “General” to setup your email settings that would otherwise already by in Outlook.

Enter in your email parameters that you receive from your Internet Service Provider or email client documentation and enter them on the General tab as indicated in the screenshot.

Some ISPs require you to send your username and password with each e-mail you send. If your ISP requires this, put a check in “My server requires Password Authentication” and fill out the information boxes that appear.

If you use a dialer to connect to the Internet (as opposed to a direct connection such as DSL or Cable modems), put a checkmark in “Use RAS Dialer” and select your dialer’s name from the drop down list that appears.

NOTE: *If you use the RAS Dialer option Express will not allow you to send a database backup during the overnight processing.*

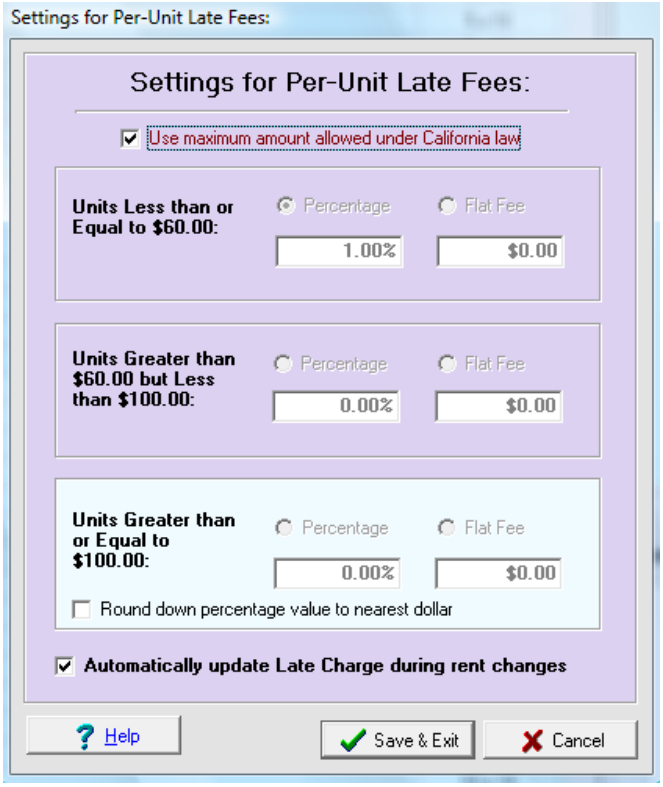
Put a checkmark in the box next to “Process Outbox during Overnight”. If you do not have a check in the “Process Outbox during Overnight” checkbox in the General tab, e-mailed reports will be placed in the Outbox, but will not be sent. You will have to process the outbox manually.

When all information is filled out completely, click on the “Test” button. This will send an e-mail message to the e-mail address you entered on this tab. When you receive this e-mail, you will know everything is set up properly.

I’m trying to set my Internet Settings. Where do I find my info?

There are a vast number of email clients available, including web based email clients such as Google’s Gmail and Microsoft’s Hotmail. As long as your email client uses or has available POP3 and SMTP parameters you will be able to use it with QuikStor Express. Please refer to your email providers documentation or support department to obtain these parameters.

CALIFORNIA LAW - LATE CHARGE SETUP



This window allows you to quickly and easily set up per-unit late charges in accordance with California late charge law (as of January 1, 2001).

To get to this section, go to File -> California Law Late Charge Setup.

Select either Percentage or Flat Fee in each price category. Then enter a value into the field below. If no units in your site match the category, simply leave it at “0”. Alternately, you can check “Use maximum amount allowed under California law”. This will disable the rest of the fields.

For your reference, the maximum allowable amounts for late charges on a given unit are as follows:

Rent $60/month or under: $10.00 Maximum

Rent between $60 and $100/month: $15.00 Maximum

Rent $100/month and over: Maximum $20.00 or 15% of Rent - whichever is greater

There is also a checkbox for the option to be able to always round down. This option allows you to have Express automatically round down if you are using the percentage section for the above columns and the amount it going to have a elongated number in the cents field.

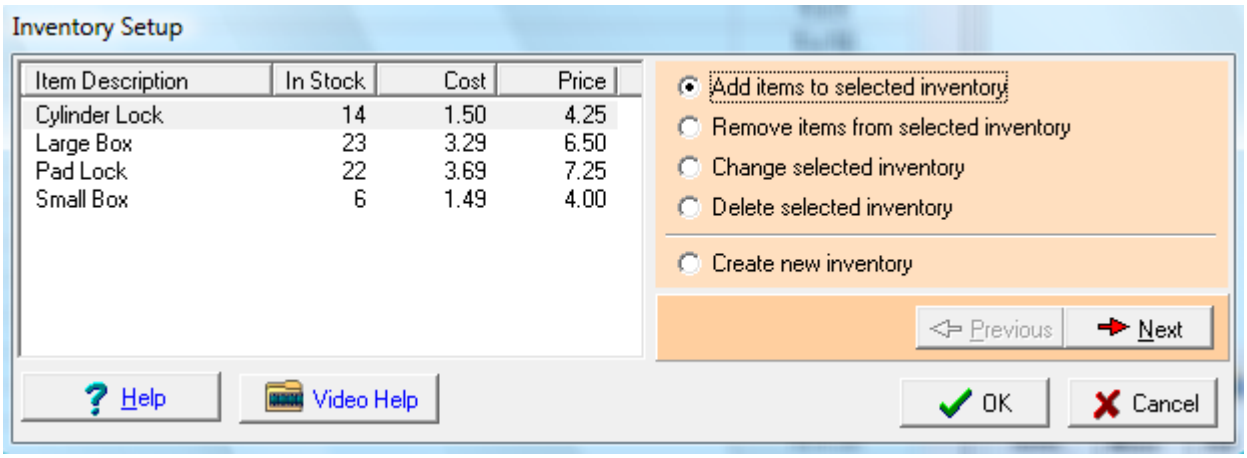
Important Note: *Using a percentage here* ***does not*** *mean that your units will update automatically during a rent change. Check the "Automatically Update Late Charge During Rent Changes" box at the bottom of the tab to have the program re-calculate the late charge percentage upon rent changes.*

When you have set the charges for this window, click ✓Save & Exit **to finish.**

Inventory Setup

This section allows you to set up an inventory of items available for purchase at your facility, aside from the units themselves.

To get to this window, go to File -> Inventory Setup. You will see a window like this:



To enter new inventory click on "Create new inventory" and then click the ➔ **Next** button. Type in the description of the inventory, how many items you have in stock, the cost for you to get more, and then the price at which you sell it. When you have entered the requested information click the ➔ **Finish** button, to save your new inventory. Repeat these steps for all of the different inventory items you wish to set up.

Once you have setup your inventory, you can make changes to it by selecting the items you would like to change by checking "Change selected inventory," and clicking the ➔ **Next** button. Make your changes in this next window and then click the ➔ **Finish** button. You can add items to your inventory, remove items, or delete inventory items completely, by selecting the inventory you wish to work with, checking the function you wish to use and clicking the ➔ **Next** button. Once you are done, click the ➔ **Finish** button.

By default this window is sorted in alphabetical order by Item Description. But if you would like this sorted by a different column such as In Stock, Cost or Price, you can do this by simply clicking on one of these headers.

Note: *You can click the* ➔ ***Previous*** *button to return to the main menu, at any time.*

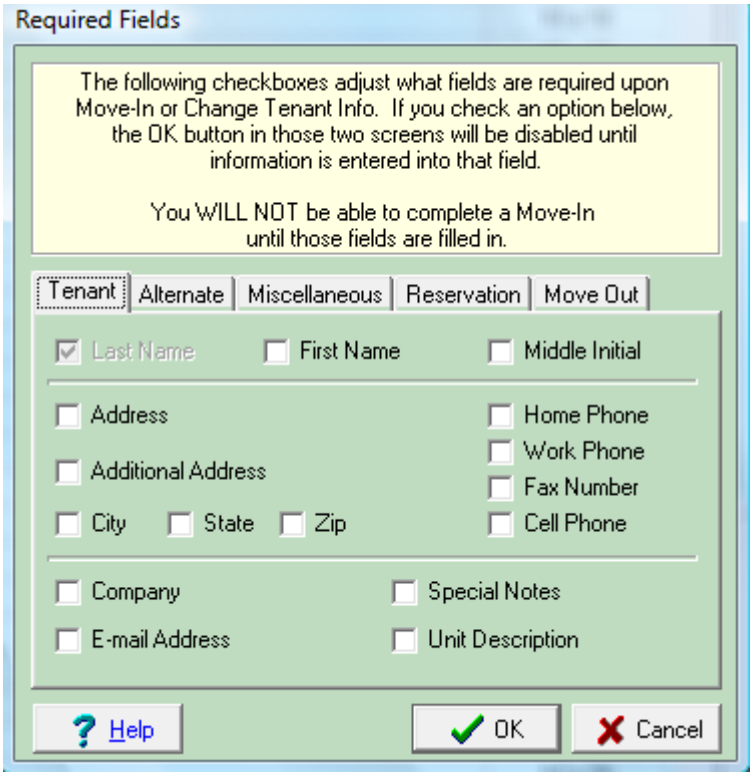
When you are finished creating/editing your inventory, check the ✓OK **button**.

REQUIRED FIELDS SETUP

This window allows you to set which fields are required when doing a Move-In or changing a tenant's information.

Note: *This setup is grayed out under normal configuration. A special owner's password is required and given to the owner solely. If you are an owner and would like to use this setup and were not given the password please contact a QuikStor Representative.*

To get to this window go to File -> Required Fields Setup. You will get a window similar to this.



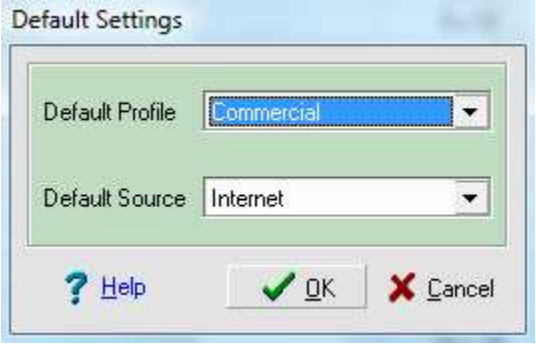
Within this window the checkboxes adjust what fields are required upon Move-In, Move-Out, or Reservation. You can also dictate which fields must be entered on the Change Tenant Info and Miscellaneous screens. If you check an option within this window, the OK button in those screens will be disabled until information is entered into that field. Which means you will not be able to complete a Move-In, Move-Out, etc until those fields are filled in.

Once you have selected the items you wish to be required click on the ✓OK button to save these changes, or click on the Cancel to exit to the main menu without saving.

PROFILE AND SOURCE DEFAULTS

This window allows you to setup the default settings of your profile and source lists.

To select this function, go to File -> Site Setup -> Profile And Source Defaults. You will see a window similar to this:



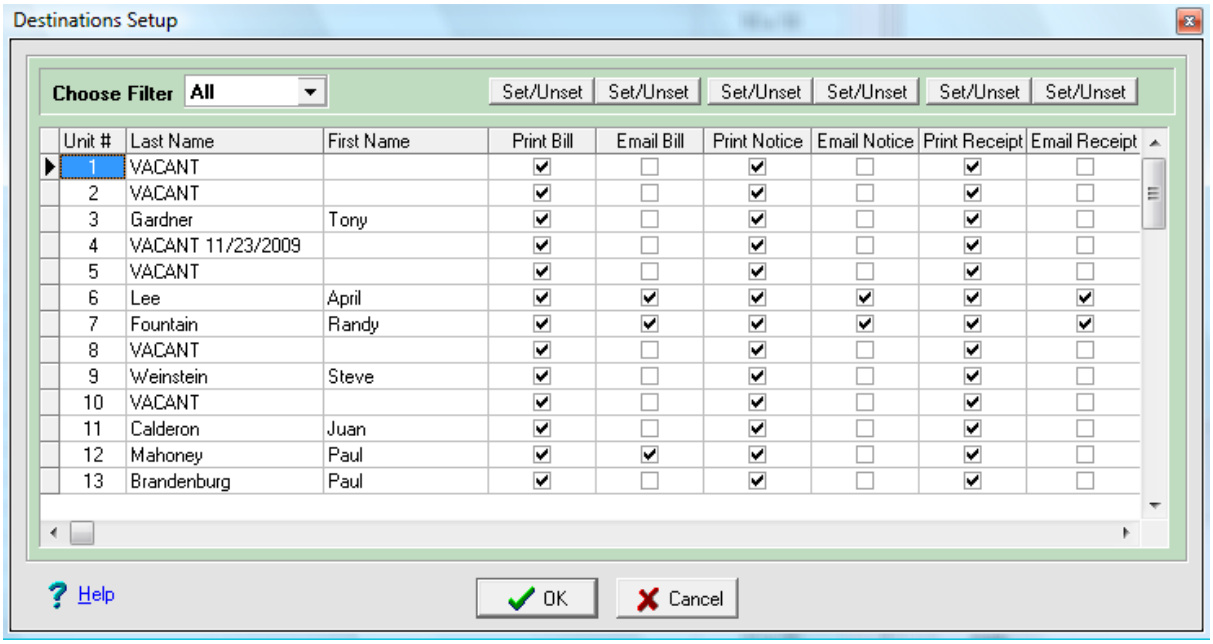
Select the item you wish to have as your default in each category from the drop down menus. If there is an item that you would like as your default but you do not see on the given list, close out of this window, and go to File -> Site Setup -> Change Site Setup -> Additional tab. There you will be able to add, change, or delete your Profile or Source lists. If you would like more information on these lists, please go to page **29** of this manual that works with the Profile and Source lists.

Once you have selected your default selections click on the ✓OK button to save these changes, or click on the Cancel to exit to the main menu without saving.

Destinations Setup

This window allows you to setup the destination options for the units at your site, including emailing and printing of bills and notices.

To get to this window go to File -> Destinations Setup. You will then see a screen that looks similar to this:



This window allows you to setup tenants to have bill & notices either set to print or email when created, or have them set to do both. In this window you can choose a filter to set all units per that filter or go through individually and set specific tenants.

SETTING BY FILTER

To set all units by a specified filter use the the drop down menu on the upper left of this window. You may choose All, Vacant, or Occupied. Once you have selected the filter, click on the Set/Unset button at the top of the column you wish to work with.

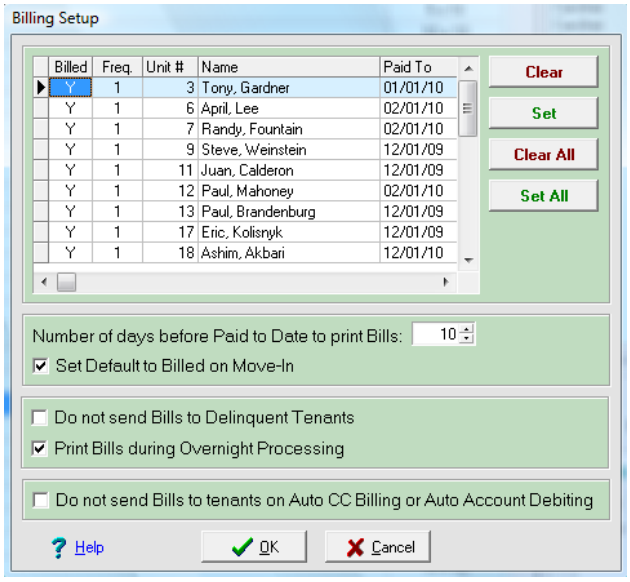
SETTING BY INDIVIDUAL

Setting individual units for one or more of the options is a simple process. Find the unit you wish to modify, and then click on the checkbox within the column you want to set or unset.

Once you have finished with this click on the ✓OK button to save the changes and exit.

Billing Setup

This screen allows you to either set or clear whether tenants will receive a Bill before their Paid-to-Date.



Go to File -> Billing Setup. To change a particular tenant's option, click on the tenant you wish to change (scrolling up or down as needed) so that it is highlighted, then click "Set" to make them receive the Bill (you will see a 'Y' in the "Billed" column) or click "Clear" to stop this tenant from receiving bills (the 'Y' will become an 'N'). If you wish to change ALL the tenants, you can either click on "Clear All" or "Set All".

You will also see a frequency column with the heading, "Freq". By default this is set to '1', which indicates that the bill will be sent once per billing cycle. However you can change this number from '0' to '12' to indicate how many months you want to bill for in advance. For example, if this number is set to '2' on January 1st it will print a bill for January and February. This option allows tenants to pay for months in advance by only receiving quarterly, bi-annual, etc billing.

The next setting, under the individual tenant setup, allows you to set the number of days before the Paid-to-Date to print Bills. Below that is a check box that allows you to "Set Default to Billed on Move-in". What this means is that if there is a checkmark in this box, when you move some one in to your site, they are automatically set up to receive a Bill during overnight processing. Leaving this unchecked means that they will not receive any sort of a Bill printed automatically for them; you would have to manually print a Bill for this tenant by selecting the tenant, and going to the Tenant menu and selecting Print Bill For Tenant.

Below that are two additional settings: "Do not send Bills to Delinquent Tenants" and "Print Bills during Overnight Processing". Check or uncheck the appropriate boxes based on your preference.

The last setting on this window allows you to decide whether or not to bill tenants that are on auto billing. Again, check or uncheck the box based on your preference.

Clicking ✓OK will save all changes and close the window, Clicking Cancel will close the window WITHOUT saving.

Activating Optional Modules in Express (QSX Standard)

QuikStor Express Professional Edition comes with all of the options listed below. However you can add any of these modules to QuikStor Express Standard Edition. These options enhance how you run you business by adding features such credit card processing, tenant photos, etc. Below you will find a more comprehensive list of the available modules: Here is a list of some of these different options, and the pages in this manual that go into more detail in explaining what they do.

QUIKPAY

Online credit card processing

- The fastest and easiest way to charge credit cards or perform ACH transactions directly through Express
- Fully PCI Compliant – your credit card information is 100% secure
- QuikStor Processing provides the lowest flat-rate credit card rates in the industry!
- Integration with Plug 'n Pay's payment gateway allows you to use YOUR merchant processor/bank of choice
- Automatic credit card processing makes monthly payments a breeze
- Save time and human error by automatically reading tenant information from their Driver License during a move-in. Uses the same credit card desktop card reader!
- Click here to read more about the features of QuikPay in this manual

EXPORT TO QUICKBOOKS™

QuickBooks™ integration

- QuikStor's integration with QuickBooks™ accounting software.
- Allows you to assign QuikStor's transaction categories to one or more income categories in QuickBooks™
- Export all "dollars-across-the-table" transactions to a QuickBooks™ import file
- Click here to read more about the features of QuickBooks™ integration in this manual

QUIKLETTER

Customize leases, notices and bills *(included in Express Professional & Standard)*

QUIK EMAIL

Email automation

- Automatically email invoices, tenant correspondences, reports, and automatic off-site backups

QUIKTRUCK

Truck rental

- Truck rental and maintenance module including reservation/rental status, and reports
- The integration with our partner, Plug 'n Pay allows seamless transactions from Express' Payment form

MICROSOFT OUTLOOK™ INTEGRATION

- Tightly integrates QuikStor Express with Microsoft Outlook™
- Easily email your tenants receipts, invoices, and notices. E-mailing such letters will cut down on printing and mailing costs.
- Use all of your default server settings already set-up in Microsoft Outlook™ - no additional effort activating email options in QuikStor Express
- All of your email will be organized and saved in one location
- All emails sent from QuikStor Express will open and save in Microsoft Outlook™ along with any other emails sent from Outlook™ directly.

BLUEMOON FORMS INTEGRATION

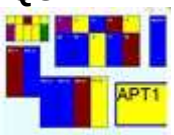
- Blue Moon is a program that specializes in form processing software.
- Blue Moon makes it easy to fill out and print lease forms from your computer so that you no longer have to fill out these forms by hand.
- No need for an inventory of pre-printed forms..
- Saves time and money by speeding up the preparation and printing of lease packages and GOLDBOOK© forms.
- Reduces errors by providing built-in math calculations, default settings for recurring items and charges, automatic data transfers from the main lease form to other forms, built-in error checking, and lease expiration reports.

DRIVER'S LICENSE SWIPE (INCLUDED WITH QUIKPAY)

- Allows your site to automatically insert the information from a new tenant’s driver's license using one of the new QuikReader Three Layer Card Scanners.
- Saves a vast amount of time inputting each move-in and/or reservation.

- **Easy to use:** simply click a button to use this feature within the move-in and reservation screens in QSX

QUIKMAP



Create a map of your site

- Color coding provides a quick status snapshot including occupied, vacancy, delinquent, etc
- Easily select a unit to work with directly on the map.
- Indicates which tenants are onsite when combined with QuikStor Guardian Keypads.
- When combined with QuikStor's wireless unit alarms it will notify you when there is a tamper or alarm event at a unit
- Click here to read more about the QuikMap feature in this manual

QUIKPHOTO

Store photos of your tenants, or anything else

- QuikPhoto brings digital photography to your mini-storage
- Know who is accessing your facility by taking & storing up to 4 photographs per unit
- Print these pictures to keep as hard copy files
- Use any digital camera or scanner and make a permanent record of a unit's contents prior to an auction
- The QuikPhoto module includes a Logitech QuikCam Express camera
- Click here to read more about the QuikPhoto feature in this manual

QUIKBACKUP

Automated Offsite Backup Service for unparalleled security

- Choose from two service levels – 30 day service that stores daily data for 30 days or the 7 day service that stores daily data for 7 days
- Automatically backups your data to QuikStor's secure servers during Overnight Processing
- The 30 day service also includes monthly backup service for 12 months
- Annual subscription required

MOBILE REPORTING

- Automatically sends your Daily Report during Overnight Processing to your smart phone
- Formatted to fit the screen of your mobile device
- Choose delivery in PDF or JPG format
- Great for the manager on the go!

CARD/CHECK SCANNING

- Don't have magnetic stripes on your state's driver's license? Don't worry, scan them directly into the program!
- Each scan automatically saves an image of the driver's license as well as a separate copy of the license photo into the QuikPhoto tab
- Scan checks into Express and have the check & account number automatically populate during the payment.
- Choose to save images of the check to upload online directly to your bank. This saves trips to the bank and typically results in funds being available quicker!
- Requires the QuikPhoto module
- The software for this module is included in QuikStor Professional, additional charges apply for the MagTek scanner

INTEGRATED MAIL SERVICE

Use an integrated mail service for all of your mail needs

- Print certified mail labels during overnight processing
- Choose to have an electronic return receipt that can be viewed online for up to 7 years
- Use a 3rd party mail service to process all of your mail needs automatically overnight
- Create default mail settings in QSX or on-the-fly per tenant
- Free certified letter envelopes from ADS (with valid account setup)

Getting Help While Using QuikStor Express

There are three integrated resources in QuikStor Express that will quickly assist you in navigating your new management software. These are listed below.

HELP VIDEOS

The majority of screens in Express include a Video Help button. When you see this button: 

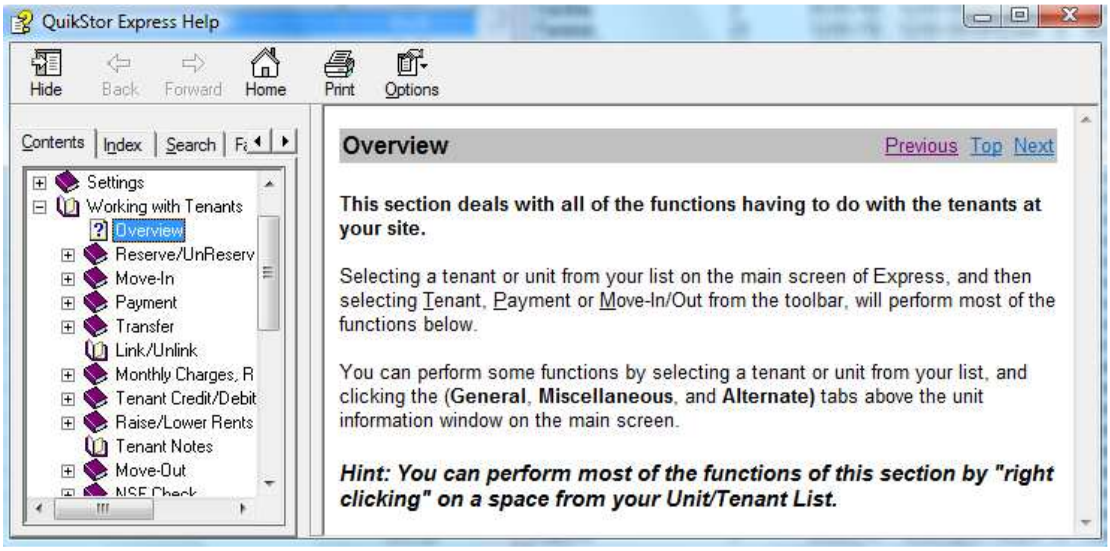
it refers you to videos relating to the location of that button. The videos walk you through the process on that screen to assist you completing your task. For a complete list of video help files, go to Help -> Video Help.

If you hear no sound during the videos, you may not have a sound card or speakers connected to your computer. To get the full benefit from this feature, both a sound card and speakers are required.

ON-SCREEN HELP

On most screens in Express you will see this button 

. Click it to find an indexed Help Menu, very similar to the Windows Help menus. The section from the screen you are currently on will automatically be displayed. For example, on the main screen you will see:



TRAINING MODE

Training mode is a great QuikStor exclusive feature that allows new managers or even seasoned users to practice functions in Express without working with live data. Simply go to Help -> Training Mode -> Switch to Training Mode and read through each prompt that comes up, answering yes to each one. Training Mode offers a full version of Express with a dummy dataset where users can practice using new features, practice taking payments, etc. all without ever accessing your site's live data! You can do any function that can be done in the normal version, see how it affects the data, and learn how each function works. When done or if you want to restore the dummy dataset you can go to Help -> Training Mode -> Restore Training Database. To exit Training Mode, just close Express. When you log back into the program, you will be in your operational database.

Navigating inside of QuikStor Express

This section of the Express manual will help you get better acquainted with the main screen of Express and the different components of it. Below is a break down of each section on the Express main screen and a brief description of how to use them.

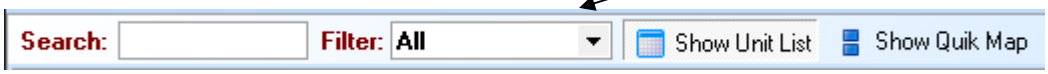
Unit	Name	Size
1	VACANT	5 x 5
2	VACANT	5 x 5
3	Gardner, Tony	5 x 5
4	VACANT 11/23/2009	5 x 10
5	VACANT	5 x 10
6	Lee, April	5 x 10
7	Fountain, Randy	10 x 10
8	VACANT	10 x 10
9	Weinstein, Steve	10 x 10
10	VACANT	5 x 5
11	Calderon, Juan	5 x 5
12	Mahoney, Paul	5 x 5
13	Brandenburg, Paul	5 x 10
14	VACANT	5 x 10
15	VACANT	10 x 10
16	VACANT	10 x 10
17	Kolisnyk, Eric	5 x 10
18	Akbari, Ashim	5 x 10
19	Gardner, Allison	10 x 20
20	VACANT	10 x 20
21	Martin, Tammy	10 x 20
22	Akopyan, Ervand	10 x 20
23	Ramirez, Manny	10 x 20
24	VACANT	10 x 20
25	Arias, Ricky	10 x 20
26	Levitt, Dennis	10 x 10
27	VACANT	5 x 5
28	VACANT	5 x 5
29	VACANT	10 x 20
30	VACANT	10 x 20
31	VACANT	10 x 20
32	VACANT	10 x 10
33	VACANT	10 x 10
34	VACANT	10 x 10
35	VACANT	10 x 10
36	VACANT	10 x 10
38	VACANT	5 x 10

UNIT LIST

This is the list of all of the units at your site with a section for Unit #, Name, and Unit Size. By default this list is sorted by Unit # but you can change how it is sorted by simply clicking title bar you want to sort by.

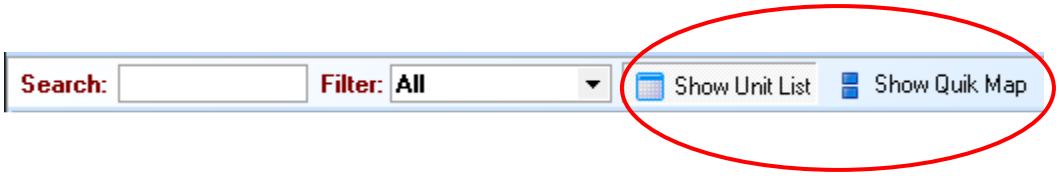
UNIT SEARCH & FILTER

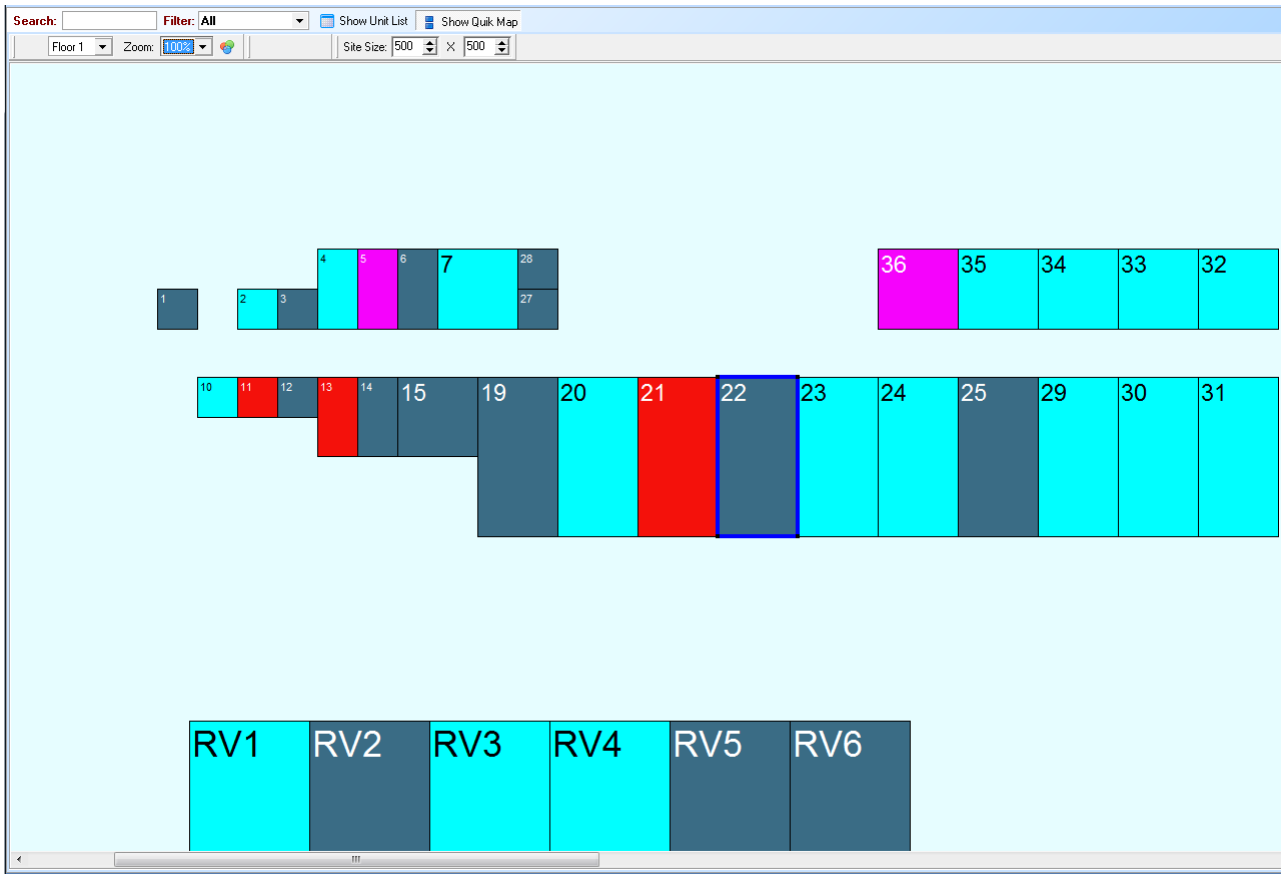
These two options allow you to enter either the unit # or last name of the tenant and search for them, or you can set a different filter such as Vacant, Reserved, Delinquent, etc. to change what the Unit List shows.

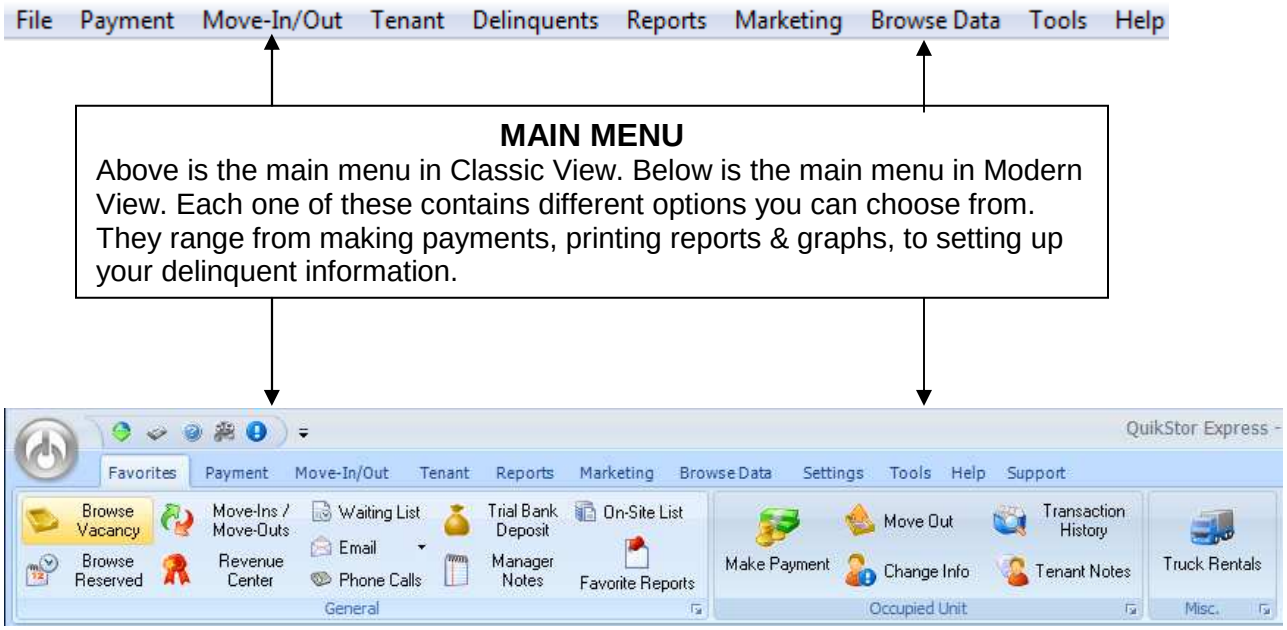


QUIKMAP USERS ONLY

For those users that have the QuikMap module you can toggle between the list view shown above and a facility map layout as shown below. Simply click the desired button:







MAIN MENU

Above is the main menu in Classic View. Below is the main menu in Modern View. Each one of these contains different options you can choose from. They range from making payments, printing reports & graphs, to setting up your delinquent information.

Code Name	Unit	PTD	Date/Time	KP	Action
Brandenburg	13	12/01/09	12/03/09 07:55 am	1	Grace Period
Invalid Code		12/30/99	12/03/09 07:54 am	1	Invalid Code
Ramirez	23	12/01/10	12/03/09 07:54 am	2	Tail Out
Gardner	3	01/01/10	12/03/09 07:54 am	0	Alarm Close
Gardner	3	01/01/10	12/03/09 07:54 am	0	Alarm Open
Ramirez	23	12/01/10	12/03/09 07:54 am	2	Let Out
Lee	6	02/01/10	12/03/09 07:54 am	1	Let In
Ramirez	23	12/01/10	12/03/09 07:53 am	1	Let In
Gardner	3	01/01/10	12/03/09 07:53 am	2	Let Out
Gardner	3	01/01/10	12/03/09 07:53 am	1	Door Close
Gardner	3	01/01/10	12/03/09 07:53 am	1	Door Open
Gardner	3	01/01/10	12/03/09 07:53 am	1	Door Close
Gardner	3	01/01/10	12/03/09 07:53 am	1	Door Open
Gardner	3	01/01/10	12/03/09 07:53 am	1	Let In
Ramirez	23	12/01/10	12/03/09 07:50 am	0	Motion Alarm

GATE ACTIVITY WINDOW

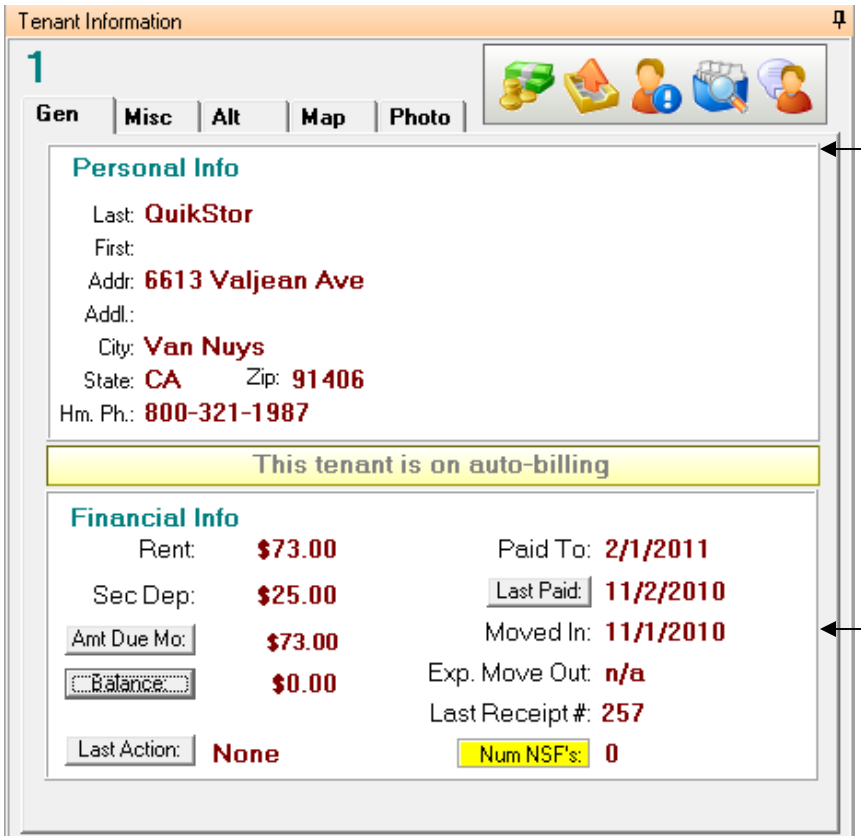
If you have a QuikStor Access Control System, all gate activity will be displayed here. Same for Wireless Door Alarm activity (if installed).

MANAGER ICONS

The above icons show the manager icons in Classic View, those below show those in Modern View. Each of these icons represents a different function within your Express software that you may use on a day-to-day basis. These all have menu options but are placed here to allow you faster access. The buttons are as follows (from left to right): Browse Vacancy, Browse Reserved, Browse Move-Ins/Outs, Trial Bank Deposit, Facility Notes, Waiting List, Email (if applicable), Phone Calls List, Onsite List, Favorite Reports, Revenue Optimization Center, and Truck Rentals (if applicable)

UNIT/TENANT ICONS

These icons represent different functions in Express that have to deal with tenants at your site, or a selected vacant unit. These buttons allow you faster access to the most common functions within Express. The buttons are as follows (from left to Right): Make a Payment, Move-Out, Transaction History, Change Tenant Info, and Tenant Notes. The box on the right is what you would see for a vacant unit, which is the Move-In icon and the Change Tenant Info button which allows you to enter a note after the “vacant” label on the unit list.



GENERAL TENANT INFORMATION

This section provides a snapshot of the selected unit's tenant information. The General tab provides you with Personal Info and Financial Info. Under the Financial Info section there are multiple boxes such as Last Paid, Balance, etc that you can click on to get even more detailed information on the tenant's financial history.

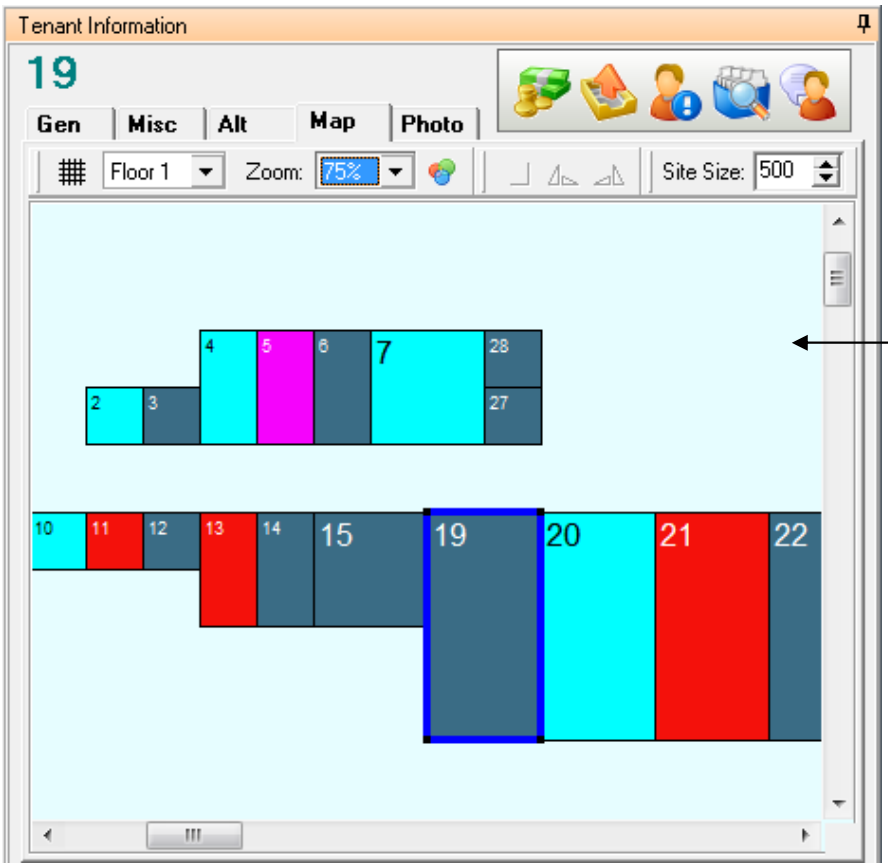
MISCELLANEOUS TAB

This section provides you with information about the unit itself as well as miscellaneous information about the tenant.

This is also where you will find the Key Codes button that gate codes (if applicable).

ALTERNATE TENANT INFORMATION

This section shows a quick view of the selected tenant's alternate information (if applicable). This is also where any custom fields that you have created will be displayed.



MAP TAB

This tab will display a digital layout of your facility if you have purchased the QuikMap module or have Express Professional.

This tab provides a quick visual snapshot of your facility with each color representing a different status.

PHOTO TAB

If you have the QuikPhoto module or Express Professional you will be able to store up to four photos per unit.

You can either take a digital photo using the Logitech QuikCam that QuikStor provided or you may load your own digital pictures to show unit condition, pre-auction belongings, etc.

Practice Tasks

Below is a list of items that you should learn what they do, how they work, how they will affect data, and what options exist within each function. All of these procedures should be done in Training Mode of QuikStor Express, which you can get to by going to Help ->Training Mode. Please check off each one of these as you go through it, both to check on your progress and to confirm that you get as much as possible out of your management software. For more information on each process, please refer to the appropriate sections inside of this manual.

PRACTICE ITEMS

- Move-In — Select a vacant unit from your list, then go to Move-In/Out -> Move-In. Try several combinations of the following, noting how each affects the tenant's Paid-To Date and how much they owe you upon move-in:
  - Normal Move-In
  - Changing Rent During a Move-In
  - With Free Stuff
  - With Inventory
  - Adding a Gate Code
  - Adding Tenant to Automatic Credit Card Billing
  - With The Following Move-In Special (½ off Prorate & ½ off Rent for 1 month)
- Payments — Various types, including: (Each one of these can be found under the Payment menu)

    - Tenant Payments
        - Standard 1- or 2-Months
        - Make a Different Payment
    - Non-Tenant Purchases (such as inventory)
    - Former Tenant Payment
    - Tenant Credit
    - Tenant Debit
    - Change a Paid-To-Date
    - Change a payment method
    - Void a payment
- NSF Check (Payment/NSF Check)
- Move-Out — (Move-In/Out/Move Out) – There are several different ways that you can move someone out, so it would be a good idea to try and become familiar with each method
- Transfer—(Move In/Out/Transfer)
- Tenant / Change Info
- How To Backup Data
    - To Hard Drive (File/Backup Database)
    - To External Media (File/Backup Manager)
- Reports — there are a many reports available in QuikStor Express. It's a good idea to print or print preview each of them so you know what information each will provide you
- Using Report Selector (find these reports) (Reports/Report Selector)
    - E-M
    - E-L-K
    - E-R-F
    - E-R-M
    - E-Y-M
    - F-A
    - F-C
    - E-U
- Icons — familiarize yourself with the icons on the main screen of QuikStor Express, many of these allow you to perform the functions mentioned in this list quicker and easier.

Integrations

This chapter discusses the various software & hardware that integrate with Quikstor Express, and how the integration works inside of Express.

IMPORTANT: If at any time you are having a problem with software that is NOT QuikStor Express, please make sure to contact the vendor of that software as Quikstor Support will not be able to assist you.

QUICKBOOKS™

QuikStor Express' integration with Intuit's QuickBooks™ software is simple to use, yet powerful. It allows you to assign QuikStor's transaction categories to one or more *income* categories in QuickBooks™ and export all "dollars-across-the-table" transactions to a QuickBooks™ import file.

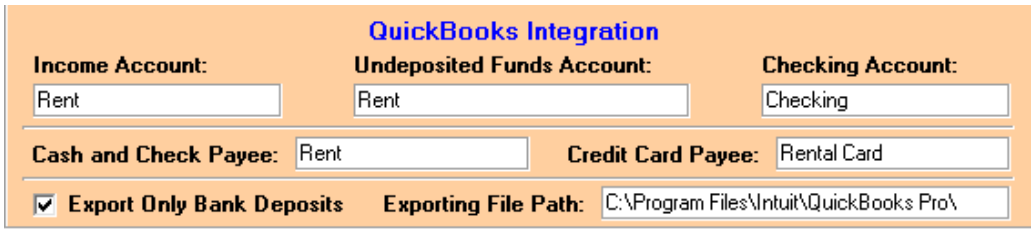
NOTE: *Before reading this section, you should be familiar with QuickBooks™ operation and accounting, such as the definition of an income account. QuikStor cannot assume responsibility for teaching you the operations of QuickBooks™, nor are we responsible for operator error in QuickBooks™ after the actual export. Please consult your QuickBooks™ documentation for any needed assistance.*

QUIKSTOR SETUP

The first step towards using the integration is setting up the QuickBooks™ accounts. Go to *File -> Setup -> Change Site Setup*. Click the *Additional Charge Labels* tab. At the bottom of this tab section, you will see three fields – "Income Account.", "Checking Account", and "Undeposited Funds Account". These account labels must match exactly as the income labels you have set in QuickBooks.

Below that you will setup your "Cash and Check Payee" and "Credit Card Payee".

Finally you can check or uncheck the, "Export only Bank Deposits" box based on your preference as well as indicate the path of the exported file



FIRST USE

Under the File menu of QuickBooks™, choose "Import…". You'll need to navigate the file dialog to your QuikStor Express data directory – most times, this is "C:\QSX". Select "Daily.IIF" when you get to the correct folder.

If you receive an error message, call QuikStor Technical Support at (800) 321-1987. Otherwise, you should see a dialog which says "Your data has been imported successfully." Congratulations!

SUBSEQUENT USES

Using the integration should now be as easy as selecting "Export to QuickBooks™" from the tools menu any time you have new data and wish to transfer it over. Just follow the above instructions from "First Use" above. If you use QuickBooks™ every day and need to export every day, do a single-day export by putting in the same date in both places when asked. Make sure that you do not do an export unless you've already done a deposit for that day.

It's very important NOT to import the same date twice! For example, if you've already imported 10-1 through 10-31 and now need to import 11-1 through 11-30, **DON'T** put in a date range from 10-1 through 11-30! You'll end up with double values for the month of October. You will get a warning message if you try this!

QUIKPAY DIRECT

QuikPay Direct is the fastest and easiest way to charge credit cards. There are two integrations available with QuikPay Direct. The first is a seamless integration called, "QuikStor Processing" that provides the lowest flat-rate in the industry. The second is an independent payment gateway provided by Plug'n Pay. Both methods are 100% PCI compliant and stores all sensitive credit card information on the processors secure servers. No credit card information is ever stored in QuikStor Express. Both methods provide seamless transactions from Express' payment form, as well as automatic credit card & checking account billing during Overnight Processing that make monthly payments a simple automatic process.

NOTE: This is an included module in Express Professional and an optional module for Express Standard. To find out more information, please contact your QuikStor account representative.

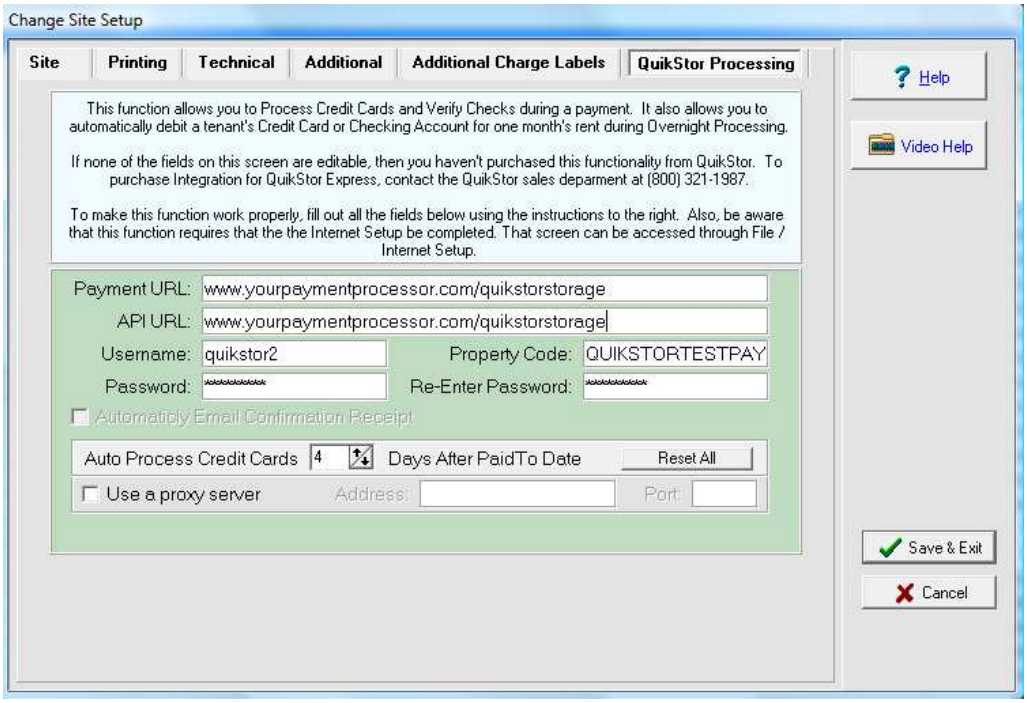
FOLLOW THESE FOUR EASY STEPS TO SET UP QUIKSTOR EXPRESS FOR QUIKPAY DIRECT

1. Fill out the paperwork for either your Plug N' Pay account or your QuikStor Processing account. **If you have any questions about this process, please contact your QuikStor account representative.**

2. Verify your Internet Setup within Express is complete. QuikPay Direct communicates with Plug N' Pay or QuikStor Processing through an Internet connection. It determines how to connect to the Internet via the Internet Setup screen – so make sure that you have gone through the Express Manual's section on Internet Setup and completed this. For confirmation, send a test e-mail through Express and make sure it is received properly.

3. Contact QuikStor to turn on the QuikPay Direct integration. **The integration itself is only accessible to QuikStor technicians.**

4. Express Setup. **The final step is the setup itself. Log into Express and go to File ->Site Setup -> Change Site Setup. You will either a tab labeled "Plug'n Pay" or "QuikStor Processing" depending on which integration you have. Click on the tab and you will see a screen similar to this**



NOTE: the above screenshot is for QuikStor Processing, but the Plug N' Pay tab is similar.

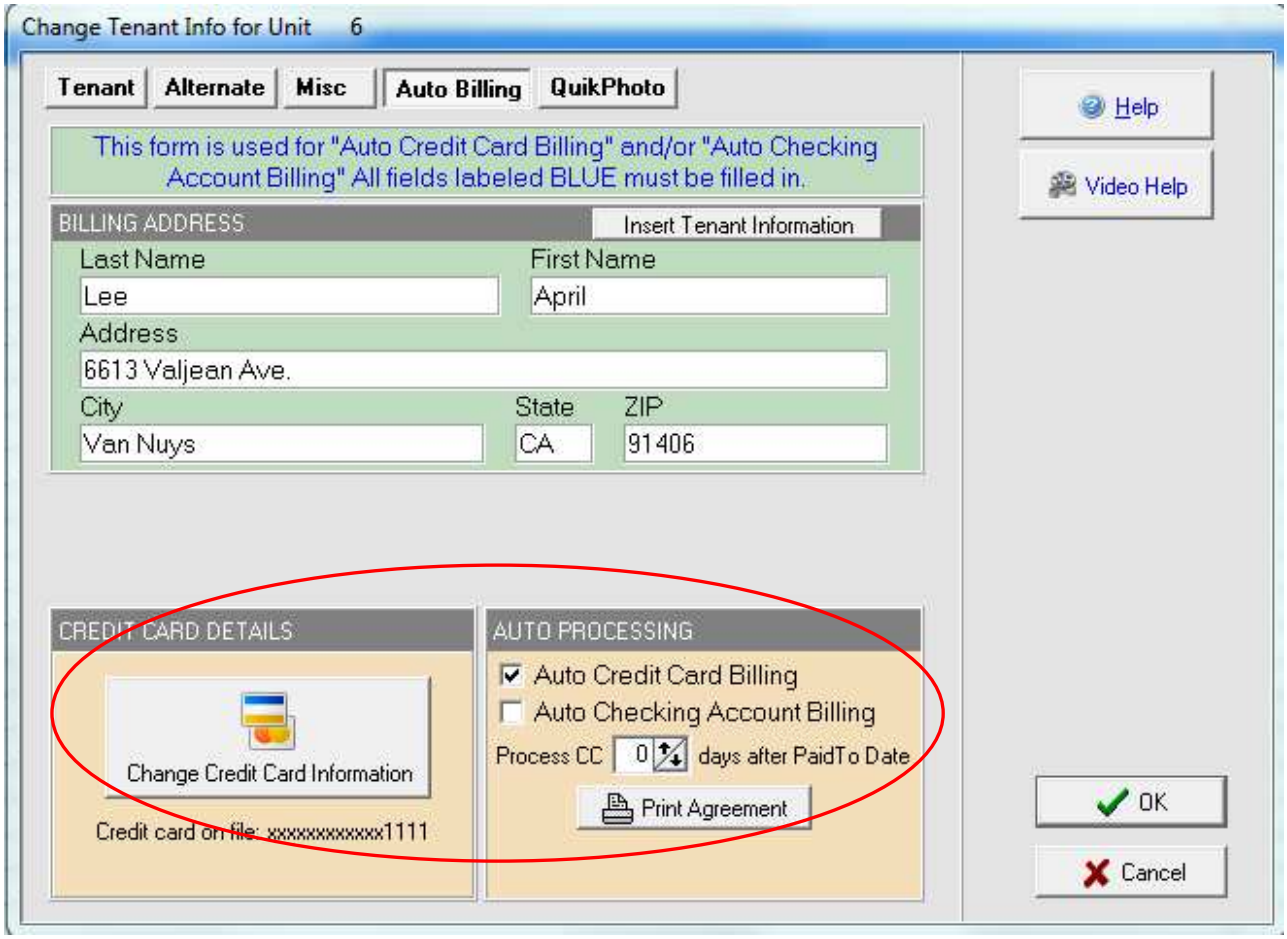
Fill in your username, password, payment URL, and API URL. These parameters are provided by either Plug N' Pay or by the QuikStor Processing processor. It is typical for QuikStor Support to set this up for you, so don't worry if you don't have this information.

Click on **Save And Exit** and you are done, and can start processing credit cards within QuikStor Express.

HOW TO SET A TENANT FOR AUTO CREDIT CARD BILLING

This function allows a tenant to have the site automatically charge a credit card one month's rent during overnight processing on the anniversary of their paid-to-date instead of having to come in or be billed.

Note: *To be able to properly use this feature you MUST have the QuikPay module for QuikStor Express and a processing merchant account. If you need either of these please call your QuikStor account representative at (800) 321-1987.*



New tenant move-in

1. Perform a standard Move-In, filling in the "Tenant," "Alternate," "Misc," and Financial Tabs as needed.
2. After the move-in is complete, click the "Change Info" button for the new tenant and move to the "Auto Billing" tab and fill in the required information. You can also use the, "Insert Tenant Information" button to auto-populate the top portion of this screen.
3. **IMPORTANT NOTE ABOUT PCI COMPLIANCE:** credit card issuers take security very seriously, as does QuikStor. Because of that QuikStor Express is 100% compliant with PCI credit card regulations. This means that no credit card information is stored in the Express program. Whether you are using QuikStor Processing or the Plug N' Pay gateway system, both options are PCI

compliant and use a tokenized system to store credit card information on the merchant processors secured servers.

4. In order to get the credit card information onto the secure processor's server, you must click the "Change Credit Card Information" button, and enter in the new card information that you would like to use for auto billing. This will update the secure processing server with the new card information for auto-billing.

NOTE: no payment is necessary to add a credit card for auto-billing, but you MUST complete the move-in process before setting up auto-billing. The purpose for this is that only a single token can be saved per unit, so if you setup an auto-billing card, and then use a different credit card for the move-in, you may inadvertently save the incorrect credit card number for auto-billing. This is a safeguard feature to ensure that does not happen.

1. Once the desired credit card is added into the system you will be able to select the, "Auto Credit Card Billing" checkbox. Unchecking this box allows you to delete the credit card token from the processor's server.
5. Below that you will also set how many days after the Paid-to-Date to process the credit card. Set this to '0' to process on the Paid-to-Date
6. Click the "Print Agreement" button, and have the customer sign it, to authorize the use of their credit card.

Updating an existing tenant

2. Select the tenant from the main screen, and highlight their name with the mouse.
3. Go to the "Tenant" Menu on the menu-bar and choose "Change Info".
4. Move to the "Auto Billing" tab and fill in the required information. You can also use the, "Insert Tenant Information" button to auto-populate the top portion of this screen.
5. **IMPORTANT NOTE ABOUT PCI COMPLIANCE:** credit card issuers take security very seriously, as does QuikStor. Because of that QuikStor Express is 100% compliant with PCI credit card regulations. This means that no credit card information is stored in the Express program. Whether you are using QuikStor Processing or the Plug N' Pay gateway system, both options are PCI compliant and use a tokenized system to store credit card information on the merchant processors secured servers.
6. In order to get the credit card information onto the secure processor's server, you must click the "Change Credit Card Information" button, and enter in the new card information that you would like to use for auto billing. This will update the secure processing server with the new card information for auto-billing. Note that no payment is necessary to add a credit card for auto-billing. You will notice that the last four digits of the current credit card on file is dispayed under this button for your reference.
7. Once the desired credit card is added into the system you will be able to select the, "Auto Credit Card Billing" checkbox.Unchecking this box allows you to delete the credit card token from the processor's server.
8. Below that you will also set how many days after the Paid-to-Date to process the credit card. Set this to '0' to process on the Paid-to-Date
9. Click the "Print Agreement" button, and have the customer sign it, to authorize the use of their credit card.
10. Click the OK button to save your changes.

IF YOU DO NOT HAVE QUIKPAY OR A CREDIT CARD PROCESSOR ACCOUNT

These two options do not affect the setup process for Auto credit card billing. Continue to follow the steps above. But, without those modules, actually charging the card is up to you and will not be done automatically on the Paid-To-Date. If you are a strict first of the month site, you can run the "Credit Cards to be charged for a Date Range" (E-R-1) on the first of each month to get the list of those tenants who you need to run the credit cards for. Anniversary or Partial Payment sites will need to run this report each day, or as often as you wish with a date range to account for every day since the last report was run. The other

report that will help you find those customers who need to be charged is the Master List of Tenants with Auto CC Billing (E-J-C). Both of these reports are under the *Credit Card / Checking Account* section of the *Reports* menu.

NEW INTEGRATED MAIL SERVICE

QuikStor has partnered with Accountable Document Solutions (ADS) to provide integrated Certified Mail and Outsourced Mailing in Express (QSX).

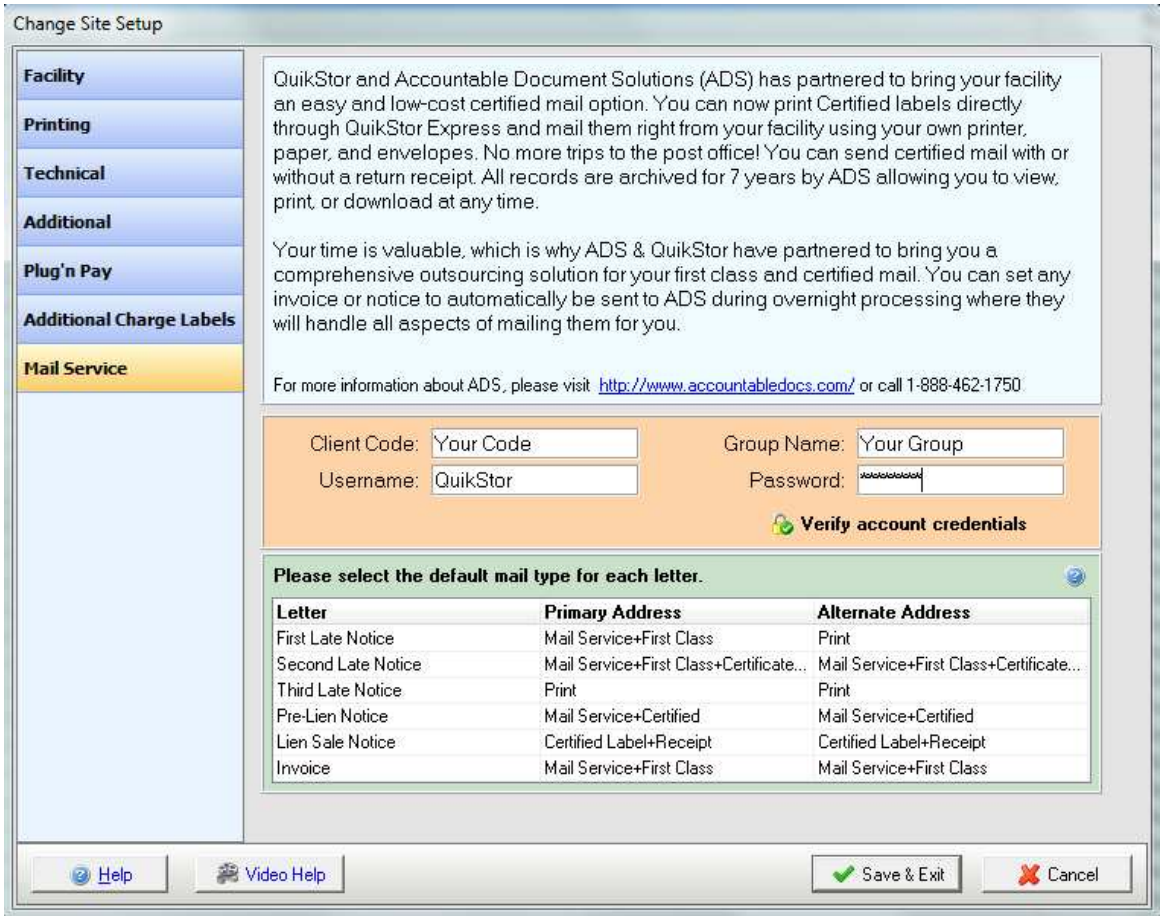
- **Certified Mail** - you can now create and mail certified documents (such as pre-lien or lien notices) directly from QSX. You print the notice as you normally would either during overnight processing (ONP) or manually. If setup to do so, your certified mail label will also print during ONP as it is printed on normal paper the same as your notices. See detailed instructions further in this manual on how to manually print a certified label for a specific tenant.

- **Outsourced Mail Service** - a facility can now outsource all production and mailing, whether it is First Class or Certified, to ADS. During ONP all bills, notices, etc that would normally print would now be submitted electronically to ADS where they would handle everything necessary to get the documents mailed in the proper way. How a specific document should be sent is defined in the new Mail Service tab of Site Settings and can be set as:
    - Print
    - First Class
    - First Class with Certificate of Mailing
    - Certified Mail
    - Certified Mail with Electronic Return Receipt

Individual bills or notices can also be sent from the Tenant tab of QSX for outsourcing. Any documents marked as Email will still be sent via email and are not part of this service.

NOTE: An active account with ADS must be setup prior to using the above services, and the Mail Service module must be activated in QuikStor Express.

To setup your default mail service settings, go to Site Settings in QSX and select the Mail Service tab as shown below:



NOTE: If you do not have the Mail Service tab in your Site Settings please contact your QuikStor account representative for activation instructions.

Start by entering the credentials provided to you by ADS after you activated your online account. Click the "Verify Account Credentials" button after doing so to confirm you are properly connected to ADS. Please contact ADS directly if you receive an error message that the credentials are not correct.

Next, use the grid in the green section of the screen to designate the mailing or printing option you would like to set as default for each type of letter.

Here are the following options and what they mean:

- **Print** - the letter or notice will print to your local printer as usual with not interaction with ADS.
- **Certified Label** - a certified label will print during ONP for any tenants setup to get this type of letter.
- **Certified Label + Return Receipt** - the same as above, except a signed electronic receipt from the recipient is kept on file on the ADS servers for up to 7 years. An additional fee from ADS will be charged for the Return Receipt.
- **Mail Service + First Class** - the designated letter will be electronically submitted to ADS for processing. It will be sent regular First Class postage.
- **Mail Service + First Class + Certificate of Mailing** - the same as above, except a Certificate of Mailing will be submitted to the USPS by ADS.

- **Mail Service + Certified Mail** - the designated letter will be electronically submitted to ADS for certified processing.
- **Mail Service + Certified Mail + Return Receipt** - the same above except a Return Receipt is also ordered by ADS which requires a signature by the recipient. An electronic copy is kept on the ADS servers which you can access with your ADS website login credentials.

NOTE: ADS provides, free of charge, #10 window envelopes for use with your printed Certified labels.

YOU MUST STILL ADHERE TO YOUR STATE'S LEGAL REQUIREMENTS FOR HOW AND WHEN A SPECIFIC NOTICE IS MAILED. PLEASE CONFIRM OUTSOURCED PROCESSING TIME WITH ADS TO CONFIRM THAT YOU ARE IN COMPLIANCE.

It is recommended that any time-sensitive mail (i.e. lien notice) be sent to ADS at least two business days prior to your normal printing date. This will ensure that they get mailed on the proper date. To do this in QSX simply move your print dates for the outsourced notices back by two days. Please confirm with ADS when setting up your account the exact lead time they recommend for your facility.

Overnight Processing:

During ONP Express will use the settings you defined on the Mail Service tab to either print or electronically submit your letters. If you have them set to print, they will be waiting for you in your printer when you arrive in the morning. There will also be a report on-screen that will show the number of Certified mail labels printed and if there were any errors. Any labels that need to be reprinted can be done individually as outlined in the next section.

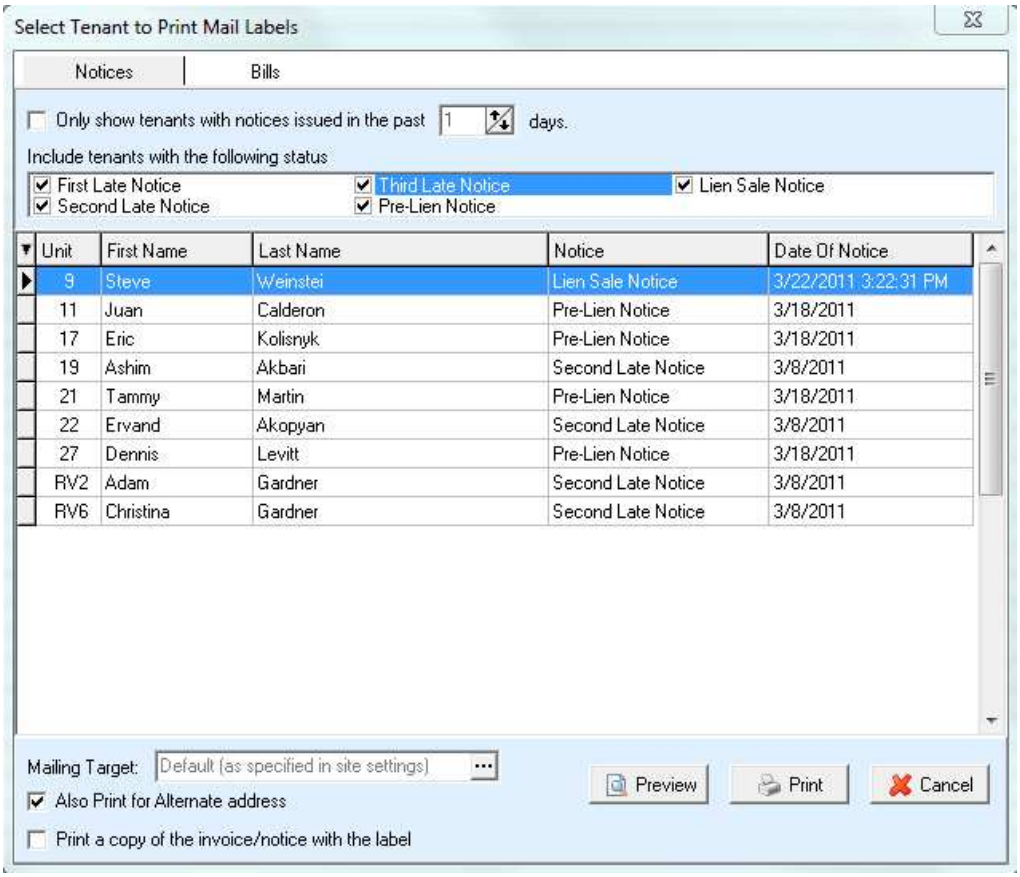
You can log into the ADS website anytime to view the letters submitted for ADS outsourcing. The website will not only show all of the notices sent, but also the status of each.

Individual Processing:

The settings you define above are your default selections for each type of letter, however you can manually print or submit for outsourcing any letter for any tenant by going to the *Tenant* tab in QSX and clicking the *Print Certified Mail Label/Mail Service* button. 

IMPORTANT: if you print a certified label at your facility and require U.S.P.S tracking and proof of delivery, you MUST print an Acceptance Form from the ADS website and provide it to your postal carrier with your certified mail. A bar code is on this form that the postal carrier will scan on pick-up registering all certified letters as entering the U.S.P.S system. For more information on the Acceptance Form, please read the ADS documentation provided to you.

The following screen will come up:



At the top of the screen you can select to view all *Notices* or all *Bills* by selecting the appropriate tab. The *Bills* tab shows all bills and you may select one or more to print/process. On the *Notices* tab you have many choices to filter your selection including how many days since a particular action was taken against a tenant and which type of notice to display. Once you set your filters you will see a list of tenants that you can work with.

At the bottom left of the screen you will see a box entitled Mailing Target. By default each notice uses the setting you defined in Site Setup, however you can click the box to modify the mailing method for each individual tenant or for a group of tenants by holding the <CTRL> key as you select each tenant.

Below that you can choose to also print a copy for the Alternate and whether or not you want to print the actual notice for the tenant.

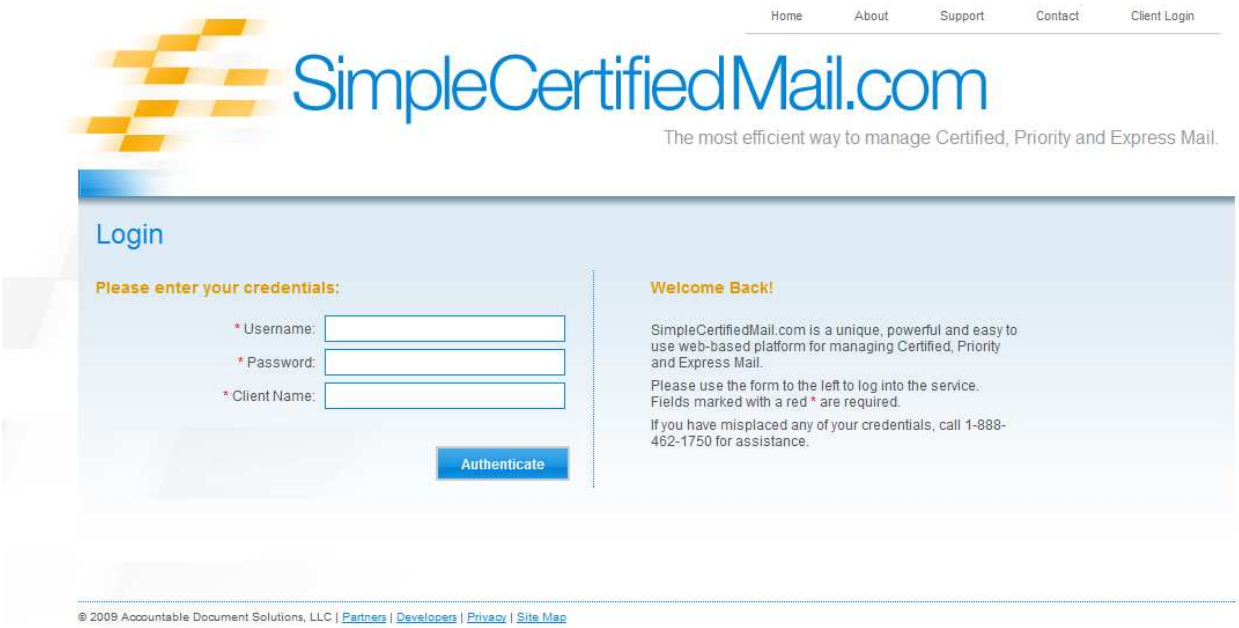
If you are printing the notice or a Certified label at the facility, you can preview a copy of the notice and the Certified label before you print.

NOTE: You cannot preview a notice on this screen if you are sending it to be Outsourced to ADS.
Click the Print/Process button when you are ready to print your notices/labels or are ready to outsource them to ADS.

Using the ADS website - www.simplecertifiedmail.com

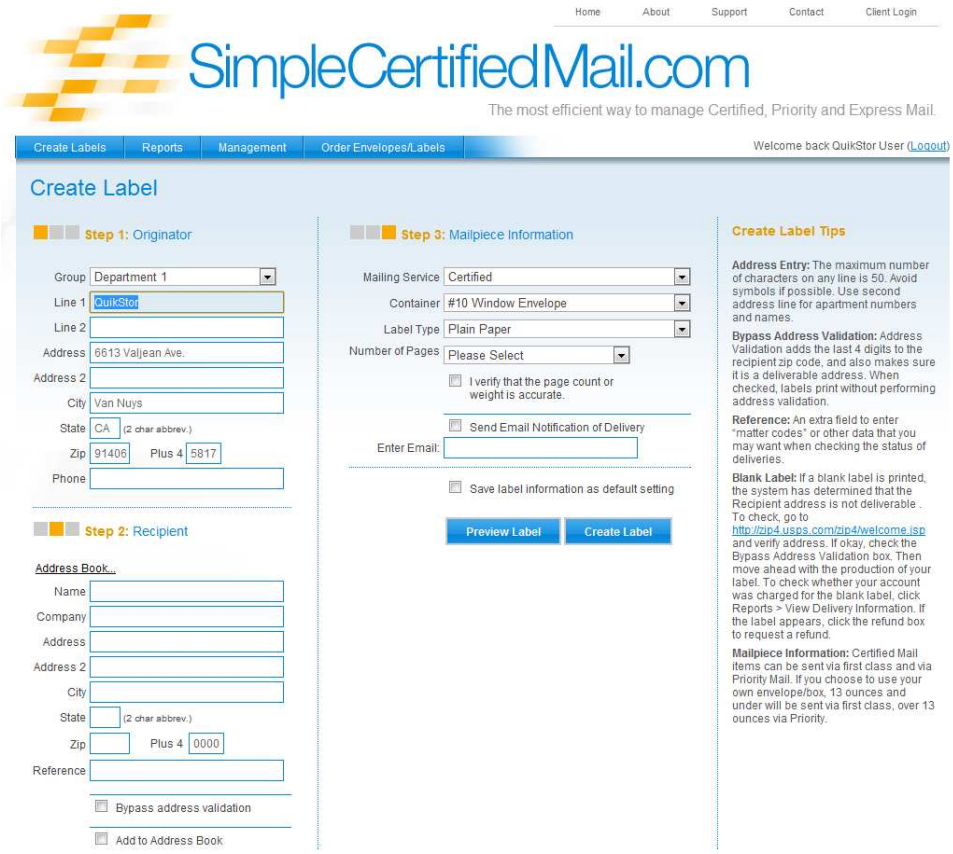
Complete instructions on accessing and navigating the ADS website can be found from ADS when you sign up for your ADS account, however we have put together some basic information on the various screens and reports that you will find helpful.

NOTE: A copy of each piece of mail that you outsource will be available for review online for 90 days.

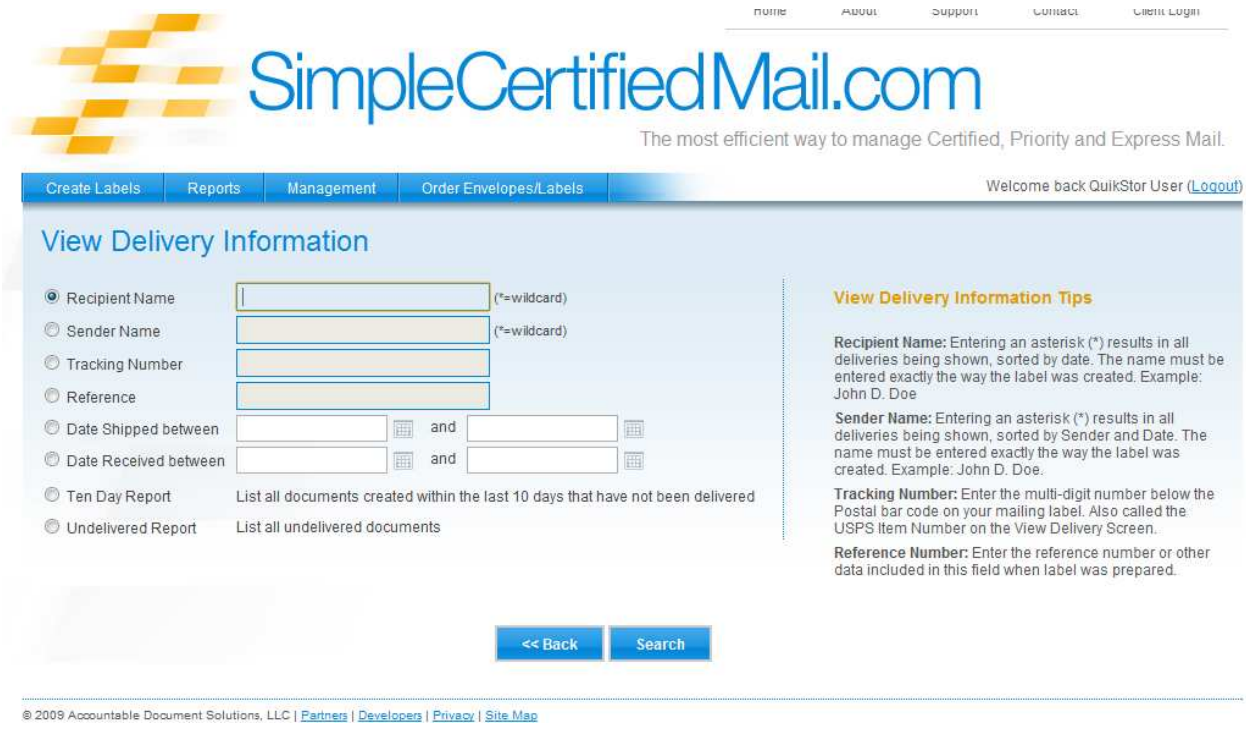


Enter your Username, Password, and Client Name then click the Authenticate button. If you do not have this information, please contact your ADS representative.

Once logged into the website you will be able to do things like directly Print Certified Labels:

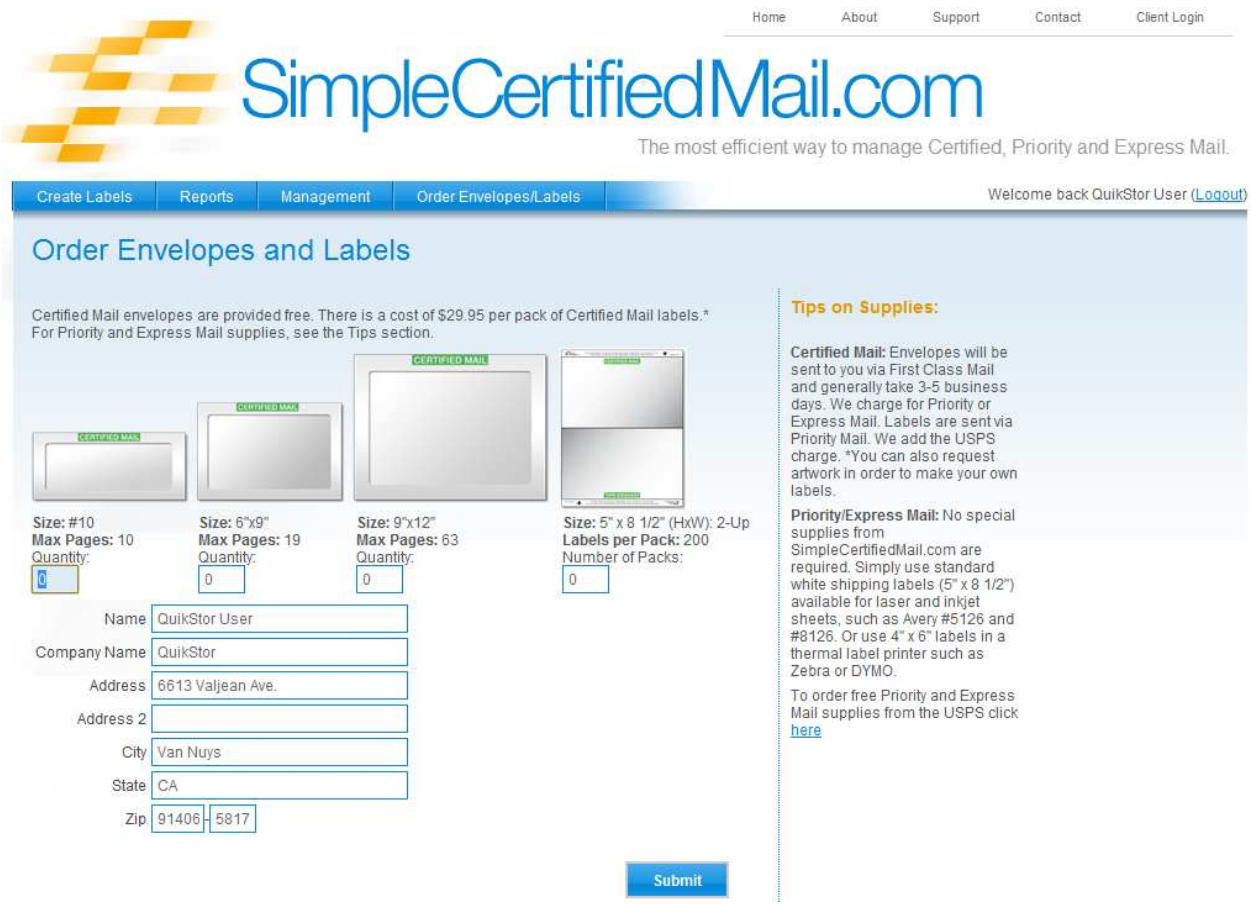


Run production reports or searches on the status of mail printed or outsourced:



Manage your ADS account, including adding funds to your ACH payment account:

And ordering FREE envelopes from ADS to be used with your printed Certified labels in the facility office:



QUIKPHOTO

The QuikStor Express QuikPhoto is an included module in Express Professional or an optional module in Express Standard that allows you to insert pictures of your tenants, driver's license, or auction itemsand be stored in the tenant's record. If you currently do not have this module but would like to order it, please contact your QuikStor account representative.

The QuikPhoto module for QuikStor Express includes a Logitech QuickCam camera. Please contact your QuikStor account representative if you need an additional camera or a replacement.

Use the installation CD that comes with the camera which contains the latest drivers. Follow the instructions provided by the camera manufacturer to install the drivers.

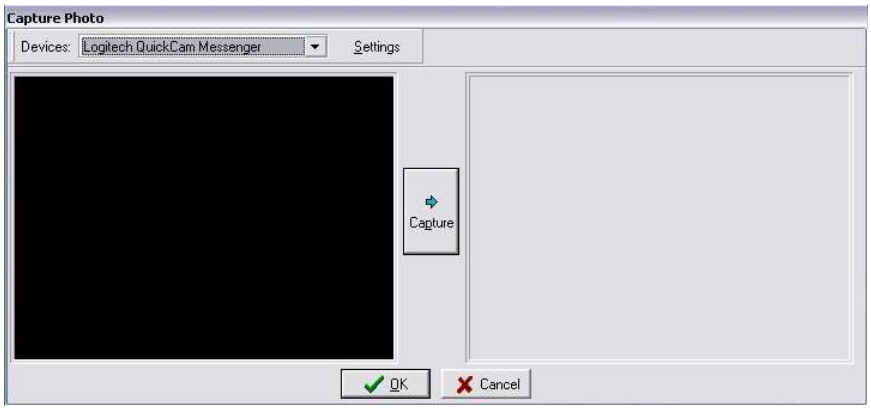
Once the camera drivers are installed, you are ready to use QuikPhoto. In Express, select the tenant for whom you would like to add a picture, and go to the QuikPhoto tab:

Alternatively, you can go into Tenant → Change Info and select the QuikPhoto tab there. The options available will be the same in both places.

You can store up to 4 separate photos for each tenant. When you select an empty slot, you have the option to create a new image or load an image from a file. When you have an image selected, you have the additional options to save a copy of the image, and to print, email, or delete the image. There is also a field just above the image where you can type in a brief description of each picture.

NEW IMAGE

This option will allow you to take a picture and have it automatically imported into QuikPhoto. The first time you bring up this window, the Devices field will be blank, so you will need to select your camera.



Once you select your camera, the black square above should be replaced with what your camera currently is viewing. You can click the Capture button to snap a photo, and then select OK to keep it or Cancel to discard it. You can also modify the camera settings:

-- Frame Rate: The default is 30 frames per second, which is real time. It can be lowered, but for this application there is no need to do so.

-- Output Size: You can choose the image size ranging from 128 x 96 to 640 x 480.

-- Flip Horizontal: If this box is checked the image will have a mirrored effect

-- RGB & Quality: Both of these are set to the working defaults and should not be modified unless asked by a QuikStor Support technician.

LOAD IMAGE

If you already have photos stored on your computer which you would like to import into QuickPhoto, select the Load Image option. You can import the most common photo extensions, including jpg, gif, bmp, etc. Browse for the photo in your computer, select the image file, and click Open. If all four slots are already taken, you may select the photo you want to replace and click the Delete button. The program will ask you to confirm removing the existing photo. Once removed you may load your new image into the empty slot.

Deleting a photo from the QuikPhoto module only removes it from Express. It does NOT delete the file from the hard drive.

SAVE TO

This option will allow you to save a backup copy of the image on your hard drive or on external media, such as a CD or USB device. The image will be saved in jpg format.

PRINT

This option will send the image to your printer. You will get a preview of the images before printing if you have print preview enabled in your site setup (option 5 under the Printing tab).

EMAIL

This will allow you to send an email with the selected photo attached. Clicking on the “Email” button in the Photos tab will open a blank email window with the subject line auto-populated with, “QuikPhoto”. You can

then enter an email address in the TO field as well as text in the body of the email. You will then need to access your outbox from Tools → Email to complete the send process. Note that if you have the Outlook Module the email will automatically be sent and processed via Outlook.

DELETE

This will allow you to discard the image. You will be prompted for confirmation to ensure that you don't lose the image if you accidentally clicked on the Delete button.

Deleting a photo from the QuikPhoto module only removes it from Express. It does NOT delete the file from the hard drive.

QUIKMAP

QuikStor was the first in the industry to provide a digital layout of your facility directly in the management software. This was an optional module called, QuikMap, that allows you to quickly view your tenant list in a map format versus the standard list format. In addition each unit is color coded to indicate the status of the unit (i.e. occupied, delinquent, etc). The following is an explanation of the setup and operations of the QuikMap feature.

SETUP

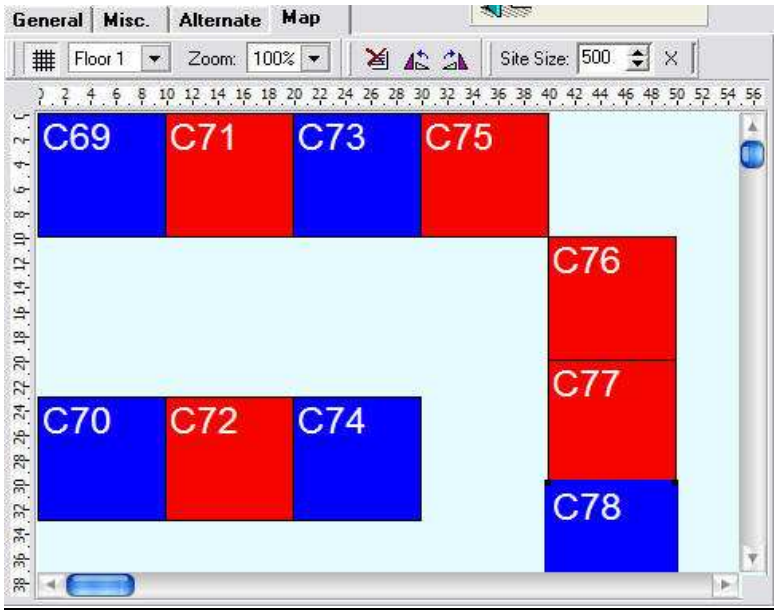
This module is included in Express Professional and is an option with Express Standard. If you are unsure whether or not you have this option, please contact your QuikStor account representative.

The setup process of the feature itself is very simple. First, make sure that your integration is turned on within QuikStor Express for the QuikMap feature by looking on the main Screen of Express. In the lower right corner, you have a section that has various tabs you can choose from. If there is one that says "Map" then the integration is active. If not, you will need to have a QuikStor technician activate it.

Once the integration is active, the initial setup of the function is finished and you can start building your site map.

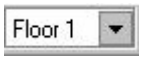
BUILDING QUIKMAP

Now that the integration is active, we can start building the map of your facility. Start out by clicking on the Map tab on the main screen of Express. You will see a window similar to this:



Start with the QuikMap Toolbar. Below is a picture of the toolbar, followed by individual explanations of each tool.

 Switch to Edit Mode—this button allows you to switch from viewing mode of QuikMap to Edit Mode, where you can make all of your changes or additions.



Select Floor—this box allows you to select which floor you wish to view and/or edit. By default Floor 1 is selected.

Zoom—this box allows you to either Zoom In or Out of the current layout of your QuikMap.

 Delete Selected Unit—when in Edit mode, this button allows you to delete a selected placed unit from the map, if you have placed this incorrectly. NOTE: This does not affect the unit list in Express.

 Rotate Unit Left—when in editing mode, this button allows you to rotate a selected unit to the left. (Counterclockwise)

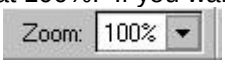
 Rotate Unit Right—when in editing mode this button allows you to rotate a selected unit to the right. (Clockwise)

Site Dimensions—this box allows you to input the dimensions of your site layout.

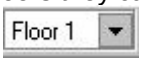
Now that you have learned what each of the tools do, let's use them.

Start off by clicking on the  button, “Switch to Edit Mode Tool” to begin. Once in Edit mode, simply selecting a unit from your unit list by clicking down and holding the left mouse button, and then drag it into the QuikMap layout. To place the unit, let go of the mouse click – and the unit is placed. If you wish to move it again, click and hold the unit and drag it to the new location.

Continue doing this with each unit from your Unit list to build your entire site layout plan. Depending on your site’s layout, you may use the  Rotate Unit Left &  Rotate Unit Right buttons to angle the units to best match your site layout. If for some reason you place a unit and don’t like where it is, or have placed it in the wrong position, you can delete it by clicking on the  Delete Selected Unit button. This action only removes it from the QuikMap layout, not from Express.

By default the QuikMap is zoomed at 100%. If you want to either zoom in or out, making the QuikMap view either larger or smaller, click on the 

down arrow and select the percent you would like the view to be at.

If your facility has multiple floors they can be created & displayed on separate “layers” of the map. To switch between floors, click on the 

button and select the floor you wish to view.

When you are done editing or building your site layout, click the  button to exit Edit Mode.

To print your site layout, right click your mouse in an open area within the QuikMap, and a menu will come up asking if you wish to “Print This Floor” or “Print All Floors.”

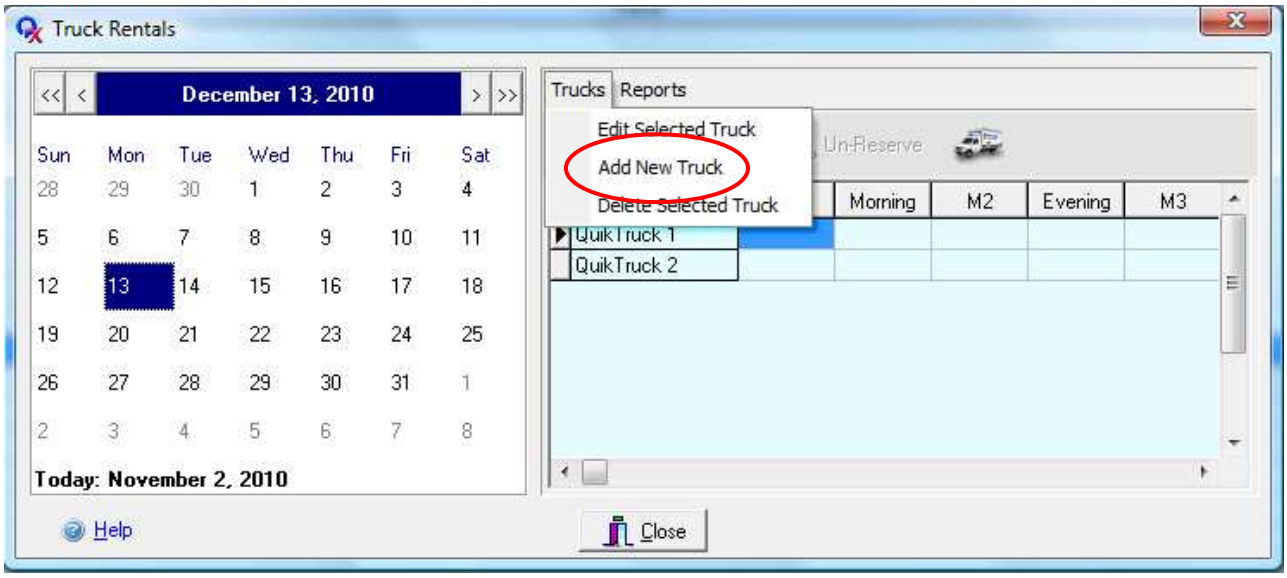
HINT: Once all your units are placed in the QuikMap and you are in viewing mode, clicking on a unit in the map will bring Express to that unit’s record in the Unit List.

QUIKTRUCK

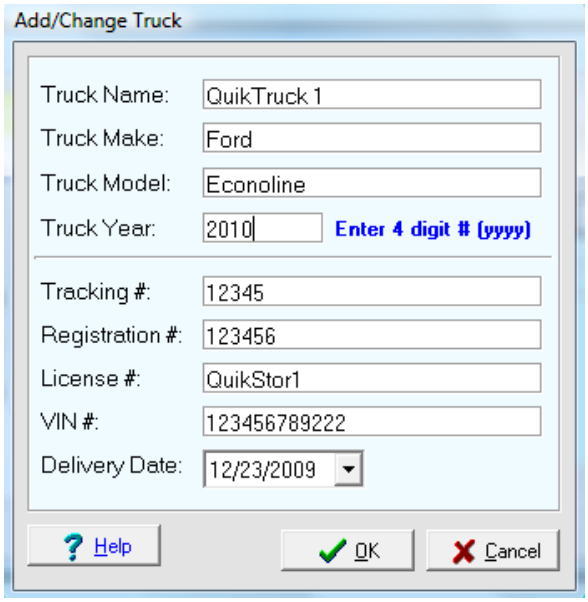
QuikStor Express has a module that allows you to track truck rentals & reservations. This module is included in the Professional, and available as an optional module in Standard. It is not available in Lite.

<u>IMPORTANT!</u> In order to take payments for truck rentals, you must have Additional Income Label #7 in Site Setup set to “Truck”. If this is not set correctly, any payments you take for trucks will not show up in any of your reports.

On the main Express screen you will see a small truck icon like this:  Click this icon and you will see the following screen:



This menu includes adding new trucks that you can rent, deleting trucks from a site's data set, and editing the information about a selected truck. Here is a breakdown of each of these options.



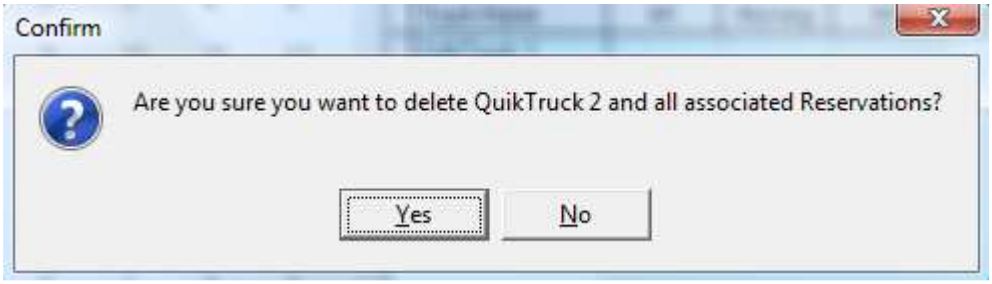
ADD NEW TRUCK

This option allows you to add new trucks to the truck inventory. When you are adding a new truck you will see a window like this:

The only required field in this form is the Truck Name, but you can enter in more information for tracking purposes such as: Make, Model, Year, Tracking #, Registration # License Plate #, VIN # and Delivery Date. Once you have entered in at least the Truck Name you can either click on the ✓OK button to save, or the Cancel button to exit without saving.

DELETE TRUCK

This option allows you to delete an existing truck from a remote site that you are connected to. First select the truck that you wish to delete, then go to Trucks -> Delete Selected Truck. You will get this message:



Select Yes if you wish to continue and delete the Truck, or select No to quit without deleting the Truck.

EDIT SELECTED TRUCK

This option allows you to edit the information about a truck. This option is very similar to the add truck option. You will use the same form. Start out by selecting the truck you wish to edit and then go to Trucks -> Edit Selected Truck.

Once you have made the changes to the truck that you wish, click on the OK button to save, or the Cancel button to exit without saving.

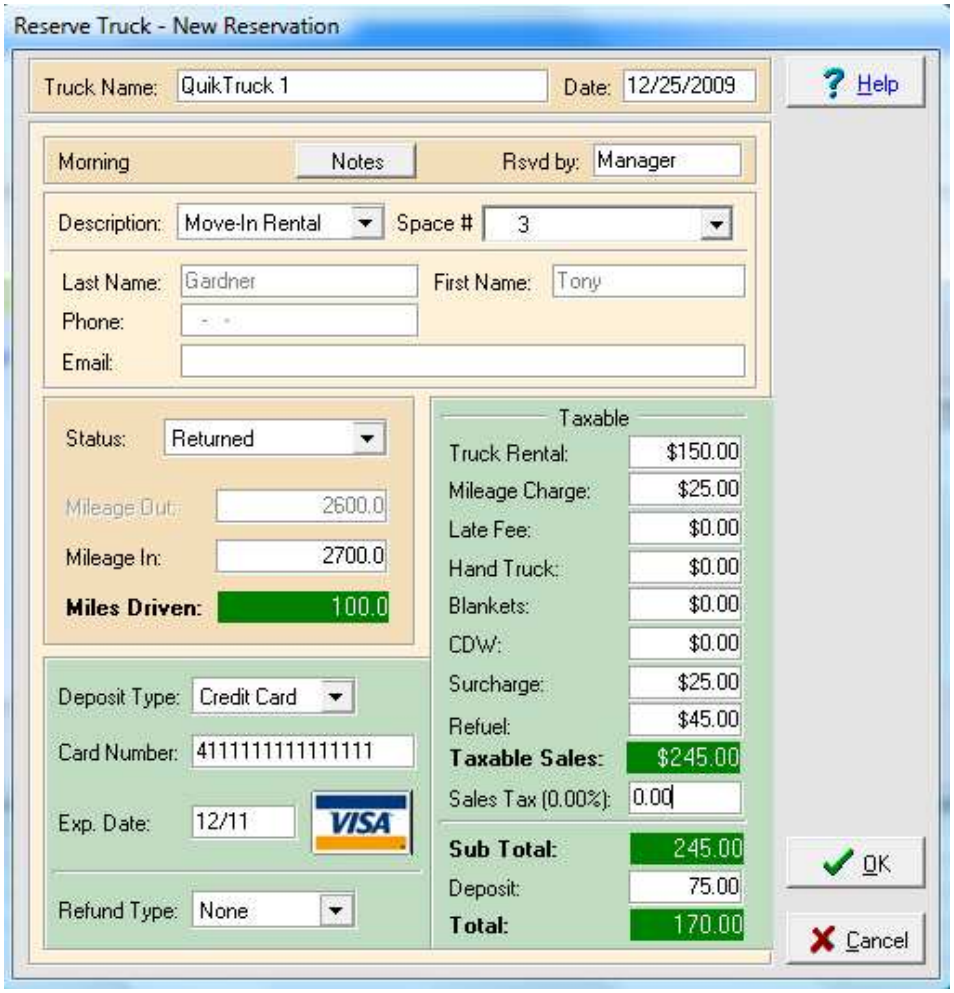
ADD A RESERVATION

Once your trucks are added into the system you can start reserving and renting them. Click on the calendar in the left window to select the day of the reservation/rental then click on the truck you want to reserve/rent and you will see several columns to the right of the truck name:

- **M1** – this is to be used by the manager when taking the truck for fuel, washing, maintenance, etc.
- **Morning** – click on this cell if you are reserving/renting the truck in the morning hours
- **M2** – this is to be used by the manager when taking the truck for fuel, washing, maintenance, etc.
- **Evening** – click on this cell if you are reserving/renting the truck in the evening hours
- **M3** – this is to be used by the manager when taking the truck for fuel, washing, maintenance, etc.

Click on the desired cell as described above, then click this button: 

You will see the following form to fill out:



On this screen you can go through each section and enter in the requested information. If it is an existing tenant or a move-in you will be able to select the unit/space number and the tenant information will auto populate. You can also click on the “Notes” button to enter in specific notes about the truck condition at the time, special requests, etc.

The next section allows you to select the status of the reservation. There are several options ranging from reserved, rented, returned, and carryover (keeping overnight). Depending on which option you select the screen will modify so that you can put in the appropriate information. For example, the screen above shows the “Returned” status which turns on the entire payment box on the bottom left. This is where you would enter in all of the expenses surrounding the rental. When you click, “OK” you will be taken to the Payment Method screen where you can finalize the payment and print/email a receipt.

EDIT RESERVATION

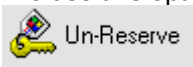
This option allows you to edit the information for a selected reservation. Select a day from the calendar, then select the reservation you wish to work with and click on the 

button.

The same form as the New Reservation form will come up allowing you to edit any of the information entered as needed.

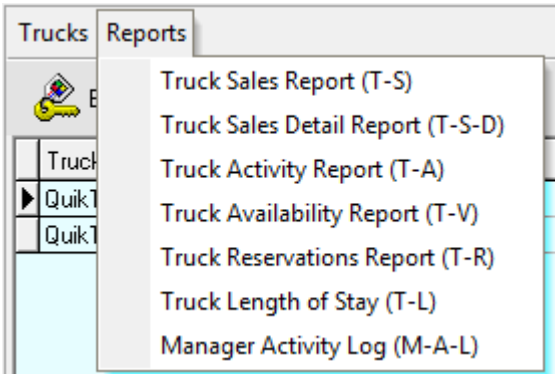
When you are finished with this window click on the ✓OK button or the ✕Cancel button to exit without saving.

UN-RESERVE

This option will allows you to Un-Reserve or delete a truck reservation. To use this option select a day from the calendar, then select the reservation you wish to remove. Click the 

button.

Click the Yes button to confirm the action, or the No button to close without deleting.



REPORTS

All of your truck module reports are convienently located inside of the main QuikTruck window. The most commonly used report, the "Availability" report, even has an icon () on the main screen for quick access.

The remaining reports are available by clicking the "Reports" menu at the top of the main screen as shown in the example to the left.

- **Truck Sales Report (T-S)**

  This report provides a breakdown of all of the monies that have been taken from truck reservations.

- **Truck Sales Detail Report (T-S-D)**

  This report is similar to the T-S report, but provides a a more detailed breakdown of each rental

- **Truck Activity Report (T-A)**

  This report shows the past activity for a single truck for a given date range. It gives you a breakdown of the number of reservations, number of actual rentals, and ending mileage for trucks either reserved in the morning or evening. It then gives you a full breakdown of the totals within that date range.

- **Truck Availability Report (T-V)**

  This report shows the availability for a single truck for a date range. It gives you a breakdown by date of the trucks that are reserved either in the morning or evening. You can also view this report by clicking on the  icon on the main screen of the Truck window.

- **Truck Reservation Report (T-R)**

  This report shows the reservations made for a selected truck for a date range. The areas that this report shows are date, slot, last name, deposit amount, deposit type, phone number, and reserved by.

- **Truck Length Of Stay (T-L)**

  This report shows you the average length of stay of a tenant that has reserved truck rentals within the desired date range. The columns it provides are date, slot, unit #, size, last name, moved in, moved out, days, rent, total rent, and reserved by.

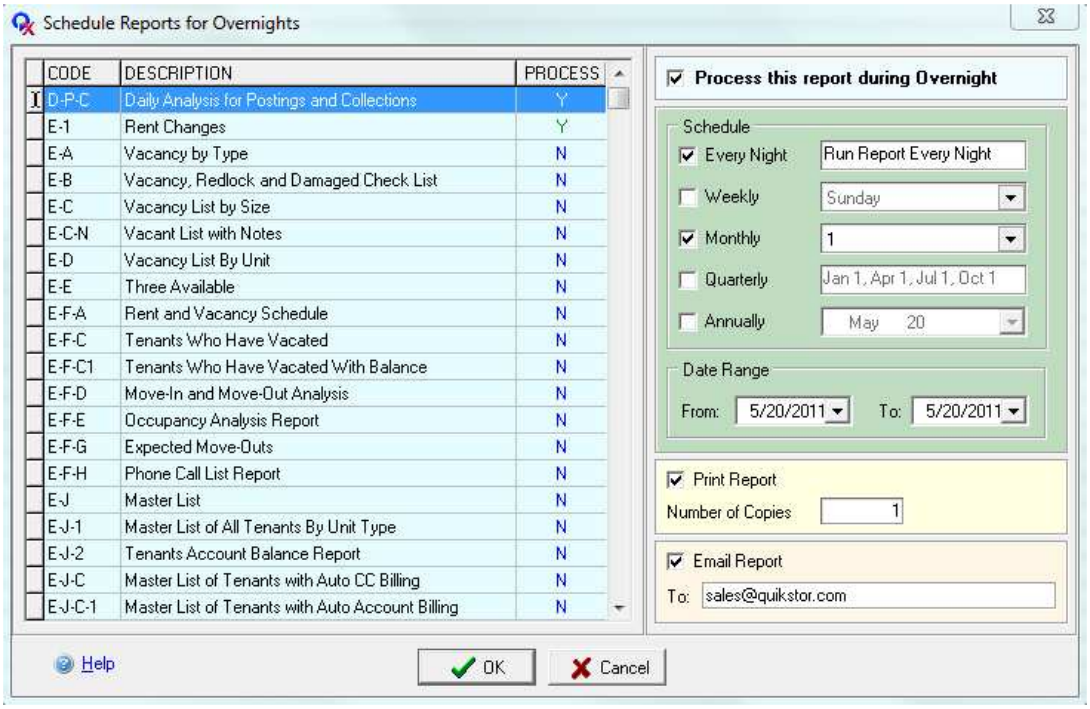
VOIDING A TRUCK PAYMENT

You can void a truck payment, just like any other payment you take during a given day, by selecting "Void a Payment" from the Payment menu. The unit will be listed as "TS" and the last name for any truck payments will be "Truck Sale," even if a current customer made this reservation.

Overnight Report Scheduling

This feature in QuikStor Express allows you to schedule any report to print during Overnight Processing.

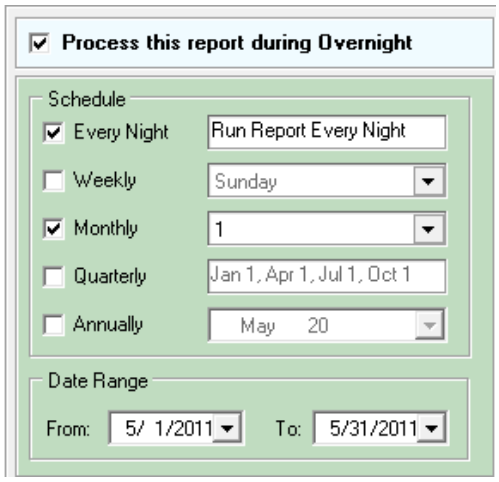
This function can be found by going to the Tools menu on your main toolbar and selecting Schedule Reports for Overnight. If this feature is not under the tools menu and you have purchased the Standard or Professional Edition of Express, please contact QuikStor Technical Support to turn on the integration. This feature is not available in Lite. You will then see a screen like this:



In this window, you have a list of all of the available reports within Express. By default they are sorted alphabetically by Alphanumeric Code, but you can sort by description or process simply by clicking on the column headers.

To schedule a report for overnight printing or emailing, scroll through the reports and select the report you wish to work with. On the right hand side of the screen, you will see different options that you can select. The first is a checkbox called, “Process this report during Overnight.” If this isn’t checked, the report will not process during Overnight Processing.

The next box is called, “Schedule”. This is the section where you will mark how often you would like this report scheduled to process.



In these fields you will enter in the desired schedule of printing/emailing for your reports. As you can see in the image above you can have it print either every night, weekly (specifying the day of the week), monthly (specifying the day of the month), quarterly, or annually (specifying the date). You may pick one or more of these scheduling options.

You also can put in the date range for which you wish it to print. This will specify the selected report’s date range; depending on the schedule you want it printed. **(For example, if you schedule the report to print weekly and you give a one month date range, the report will automatically adjust the date range by one week each time it prints)**

After you have finished filling in the information for the Schedule, you then specify if you want the report Printed, Emailed or Both during Overnight Processing.

For Overnight printing of the report, put a checkmark within the box next to Print Report and specify the number of copies you wish to print.

For emailing of the report, put a checkmark in the box next to Email Report, then put the email address you want it sent to in the field next to the To: field.

QuikStor Gate Integrations

Note: The latest in state-of-the-art access control systems, the QuikStor Guardian Series, is listed below. It replaces both the Express Gate Controller and QB Alarm systems. If you are still using either of these systems and require documentation please contact your account representative or QuikStor Support for the requested documentation or upgrade information.

OVERVIEW

The Guardian Series Access Control system is an advanced keypad system designed to control gates, elevators, and access doors. When combined with QuikStor's wireless door alarms it becomes an all-in-one security package that allows you to restrict individual access and monitor unit door operation.

The Guardian system seamlessly integrates with all versions of QuikStor Express and provides real-time gate and door alarm activity directly in the main window of Express. You will also be able to run a suite of gate and sensor reports from the Express reports menu.

All configuration is performed in the Guardian Control Panel (GCP).

For a comprehensive review of the Guardian features and benefits, as well as installation requirements and operational guidelines, please contact your QuikStor account representative and ask for the Guardian Access Control manual or log on to http://www.quikstor.com/quikstor-security/access-control-keypads.php for more information.

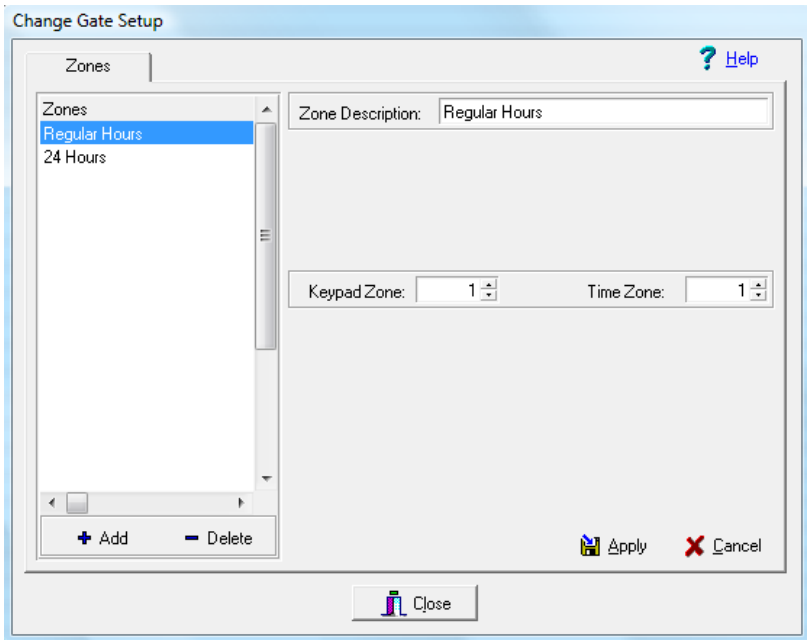
GATE FUNCTIONS IN QUIKSTOR EXPRESS

These functions can be found inside of your QuikStor Express software. To access these go to File -> Gate. There you will be able to “View Gate Setup”, “Change Gate Setup” or work with “Non-Tenant Codes”. Below you will find a brief description of each of these functions.

GATE SETUP

All variables and advanced configuration is performed in the Guardian Control Panel (GCP). Please reference the Guardian manual that came with your access system for further information on GCP and those configurations. This section will focus on the basic changes that you can make in Express.

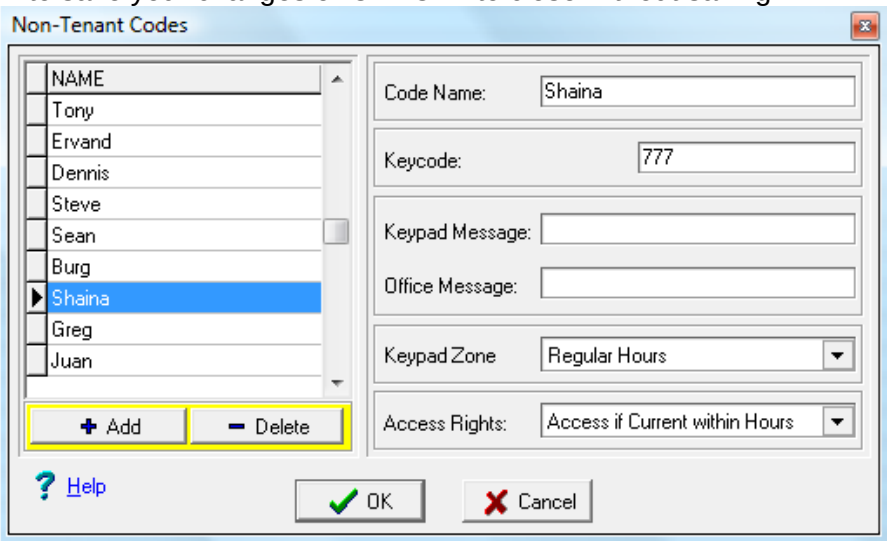
The “Change Gate Setup” window allows you to setup time zones and keypad zones which will correspond to the zones you set up in GCP. ***NOTE:*** *If you wish to view these settings but not make any changes you can select View Gate Setup instead of Change Gate Setup.* You will see a window similar to this.



When you are finished with this window click Close.

NON-TENANT CODES

You can add codes for personnel that are not tenants by going to this section. Start by clicking the + Add button and entering a name for the owner of the code. This could a relief manager, contractor, etc. Next add the desired keycode, keypad zone, and access rights. When you are finished click OK to save your changes or CANCEL to close without saving.



REPORTS

There are four reports in QuikStor express that deal with the Gates.

To access these reports go to **Reports -> Gate Activities**. Below are the four reports with a brief description of what you will find on them.

- **List of All the Gate Codes (E-Y-S)** – this report will show you a list of all gate codes in the system
- **List of all Gate Codes for Unit (E-Y-Y)—**this report will show you a list of all the gate codes for the selected unit.
- **Gate Activity (E-Y-C)—**this will list all of your Guardian gate activity, including door alarm activity if you have them. You can select a date range for the report, then how you want the report to be sorted: by date, unit, name, or keycode.
- **Gate Activity for Unit (E-Y-E)—**this report will list, for a given time period, all the gate activity for the selected unit.

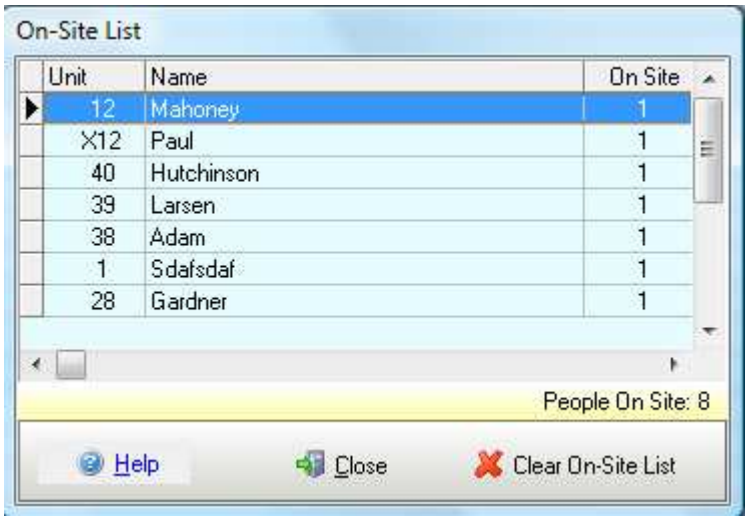
Below is a sample gate activity report sorted by date:

Gate Activity Report (E-Y-C)
QuikStor Security & Software.....Since 1987, Van Nuys
Beginning on December 1, 2009
Ending on December 23, 2009
Compiled on December 23, 2009 at 02:25 PM

DATE	TIME	UNIT	NAME	KEYCODE	CARD	ADMITTED	KP	NOTE
12/16/2009	2:59:02 PM	3	Gardner	1234	N	Let Out	2	
12/16/2009	2:58:01 PM	3	Gardner	1234	N	Let In	1	
12/16/2009	2:56:20 PM				N	Open Momentarily	2	Open Momentarily
12/15/2009	11:02:37 AM	3	Gardner	0	N	Alarm Tamper		
12/15/2009	11:02:35 AM	3	Gardner	0	N	Door Close	2	
12/15/2009	11:02:32 AM	3	Gardner	0	N	Alarm Tamper		
12/15/2009	11:02:30 AM	3	Gardner	0	N	Door Open	2	
12/15/2009	10:52:45 AM	!	!		N	Intercom	1	
12/15/2009	10:52:28 AM	3	Gardner	1234	N	Let In	1	
12/15/2009	10:48:27 AM	3	Gardner	0	N	Door Close	1	
12/15/2009	10:40:24 AM				N	Close Access Point	1	Close Access Point
12/15/2009	10:40:08 AM				N	Hold Open	1	Hold Open
12/15/2009	10:39:52 AM				N	Open Momentarily	1	Open Momentarily

ON SITE LIST

From the main Express screen you can click on the “Onsite List” icon -  When clicked the window below will come up showing you who is currently onsite at your facility. If multiple people have come in using the same code, it will increment the, “Onsite” column next to that unit’s name. The onsite list works by incrementing the onsite list by 1 each time someone enters a code at your entrance keypad. The onsite list is decreased by 1 each time they enter a code at the exit keypad.



To clean the list (preferably when you know that everyone is truly offsite) of any tenants that tailgated, you can click the “Clear On-Site List” button at the bottom of this list.

***NOTE**: If you clear this onsite list while people are still onsite, and you do not allow tailgater’s codes to allow them to exit, you may lock tenants into your facility. So use caution when clearing the onsite list!*

Third Party Gate Integrations

QuikStor recognizes that not all facilities will use the tight gate integration provided by the Guardian system. For those users, QuikStor does offer one-way integrations to other industry gate vendors. This integration will allow QuikStor to pass limited rental information, such as keycodes, to the gate system. However no information is passed back to the Express software. This means that all reports, gate activity, and settings must be accessed through your gate system software of choice.

To have a 3rd party gate integration activated in Express, please contact your QuikStor account representative for integration pricing and activation.

QuikStor Kiosk Integration

QuikStor Express provides a comprehensive two-way integration to the OpenTech Insomniac line of self-service kiosks.

INSOMNIAC™ Alliance Partner For more information about Insomniac kiosk's please contact your QuikStor account representative today or OpenTech directly by visiting: http://www.opentechalliance.com/

QuikStor Call Center Integrations

QuikStor Express has integrations to the leading call centers in the self storage industry. A call center can provide tenants with access to your facility 24/7/365 allowing you to rent more units and accept payments even while you are sleeping!

INSOMNIAC Live! The voice of self storage. For more information about Insomniac Live! Please contact your QuikStor account representative today or OpenTech directly by visiting: http://www.opentechalliance.com/

XPS Solutions 10th Anniversary 2000-2010 For more information about XPS Solutions please contact your QuikStor account representative today or XPS Solutions directly by visiting: http://www.xpsusa.com/

QuikStor Online Listing Integrations

QuikStor Express provides several integrations with online listing websites that allow your prospects to search and find your facility. Depending on your agreement with these online services those prospective tenants will be able to reserve units directly from their websites. With the QuikStor Express integration those reservations will process in Express in real-time. For more information contact your QuikStor account representative or one of the listed companies below. As

QuikStor is adding new integrations all the time, please contact your QuikStor account representative for a current list of integrations.

SpareFoot Storage - http://www.sparefoot.com/

StorageFront.com - http://www.storagefront.com/

Storitz Click. Store. Done. - http://www.storitz.com/

USstoragesearch.com - http://www.usstoragesearch.com/

QUIKSTOR EXPRESS NOTIFICATION WINDOW

The Express notification window is a dynamic tool used to provide up-to-the-minute information pertinent to QuikStor clients. It provides information on Express updates, new products & features available from QuikStor, and a wide range of useful tips and tricks to get the most out of your software!

The screen will only show up once for each new user that logs into Express. After that it will not come up on startup unless new content is sent out by QuikStor.

Though you can always stop it from coming up by unchecking the, “Show at Startup” box at the bottom of the screen, QuikStor advises you keep this feature enabled.

MANAGING YOUR SITE

Tenants

This section deals with the functions regarding the tenants at your site.

You will be able to perform most of the functions below by selecting a tenant or unit from the list or map on the main screen of Express, and then selecting Tenant, Payment or Move-In/Out from the toolbar.

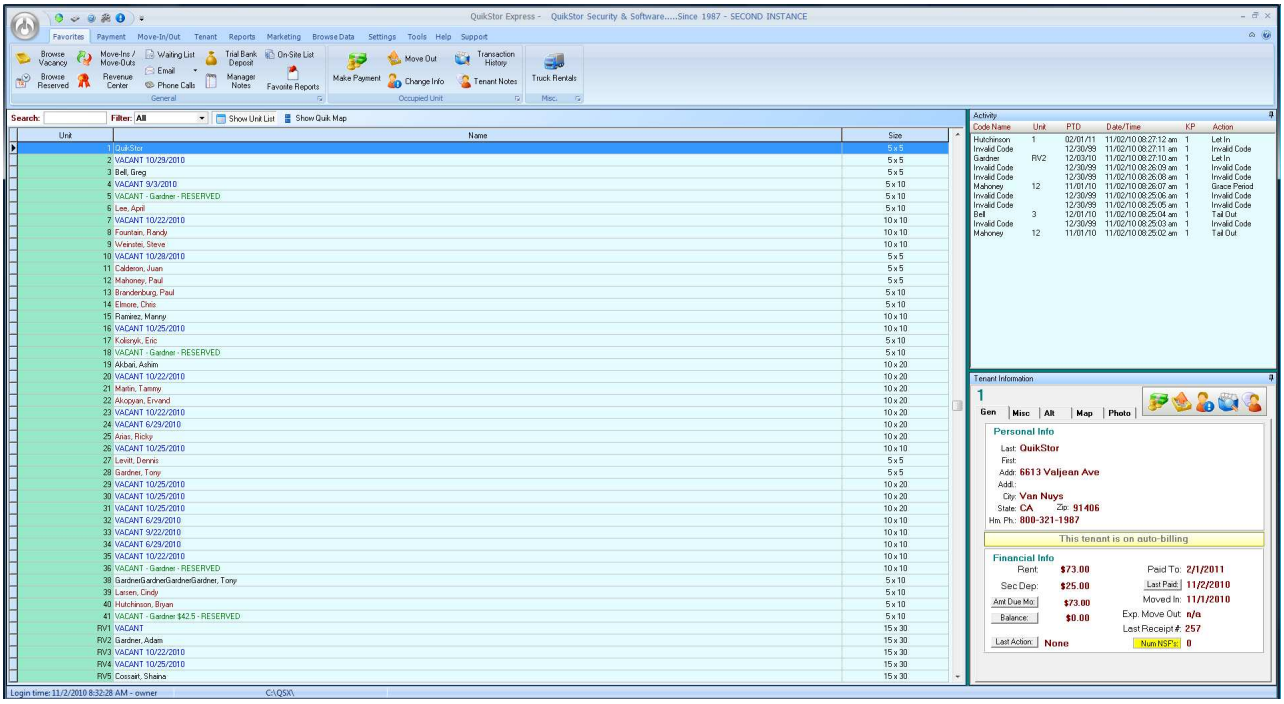
Other functions may require you to selecta tenant or unit from your list, and clicking the (**General**, **Miscellaneous**, and **Alternate)** tabs above the unit information window on the main screen.

QUIKTIP: You can perform most of the functions in this section by "right clicking" on a space from your Unit/Tenant List.

QUIKINFO PLUS (CTRL + F9)

The original QuikInfo utility that allowed a user to view tenant information while working with another tenant's record has been updated to allow complete control and modification of a second tenant's record while working with another tenant. This is a great feature if the manager is in the middle of a move-in when someone calls to make a payment on a different unit.

To start QuikInfo Plus, simply use the hot keys on your keyboard by holding the CTRL key while pressing the F9 key. A second instance of Express will pop up with a different color scheme, similar to the screenshot below. Note the green borders.

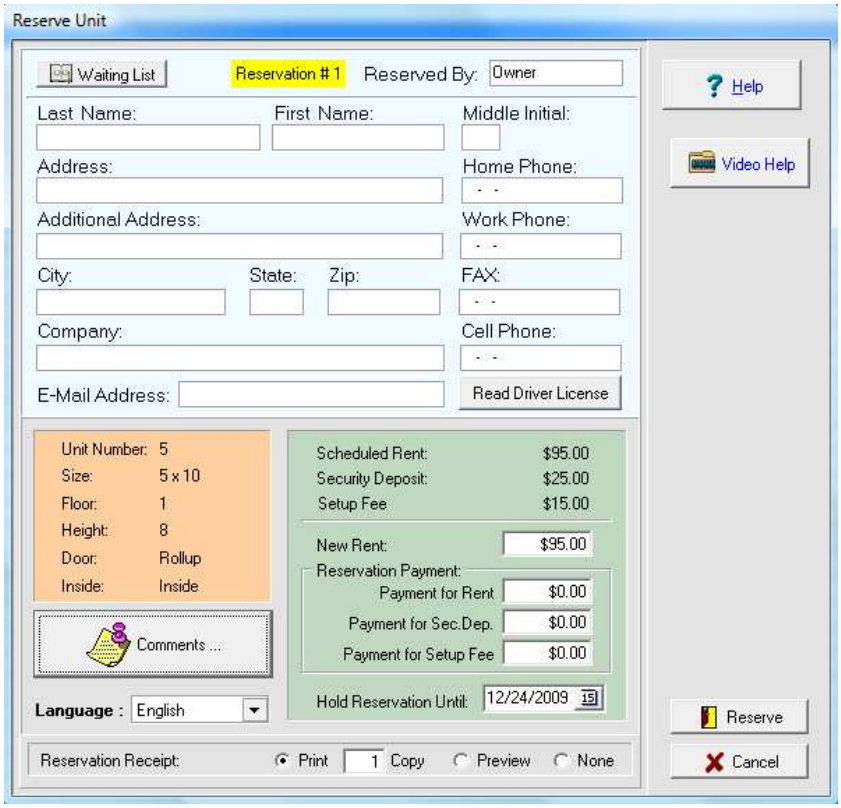


QuikInfo Plus will automatically close after two minutes of inactivity.

A notification screen will come up allowing you to keep the application open for another two minutes or to close now.

RESERVE UNIT

This window allows you to hold a unit for a future tenant. You can also receive a payment to hold the unit.



Begin by entering all desired tenant information. The only **required** field by default is Last Name.

Then, in the lower right hand corner of the screen, you can enter an amount for the Reservation Payment. The payment is split into up to three categories: Payment for Rent, Payment for Security Deposit, and Payment for Setup Fee. The amount of the Payment for Security Deposit cannot exceed the default amount of the security deposit for the unit, and the total payment will be applied to the setup fee, security deposit and rent for the unit upon move-in.

Below "Reservation Payment" you can enter the date to hold the unit until. It defaults to one day from the current date.

Note that there is a "Comments" button on the bottom left of the window where you can add notes about the reservation.

Print or preview a reservation receipt if desired.

Once you have completed all of the necessary fields, click the Reserve **button to reserve the unit.**

If you take a reservation payment, the Payment Method window will appear and you will be able to select check, cash, or credit card to complete the reservation payment.

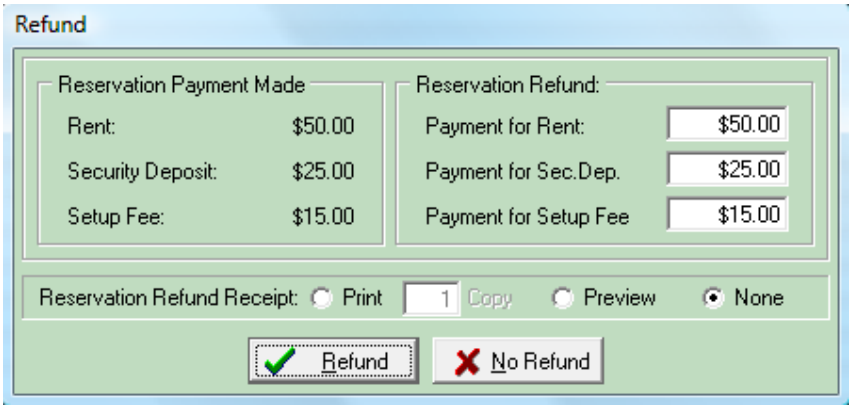
UN-RESERVE UNIT

This feature allows you to Un-Reserve a unit that currently has a reservation

Start off by selecting a reserved unit from your unit list. Next go to the Move-In/Out menu on your main toolbar and select Un-Reserve Unit.

You will get a Warning box asking if you really want to Un-Reserve the selected unit. Take this time to double check that this is the correct unit you wish to Un-Reserve, and then click on the Yes button to continue, or the No button to go back to the main screen of Express.

Once you click the Yes button, if there was any money paid towards the original reservation, you will get a window similar to this.



If this information is accurate and you wish to refund the amount indicated, click on the Refund button to finish or if you do not wish to give this person a refund click on the No Refund button to finish this without refunding money.

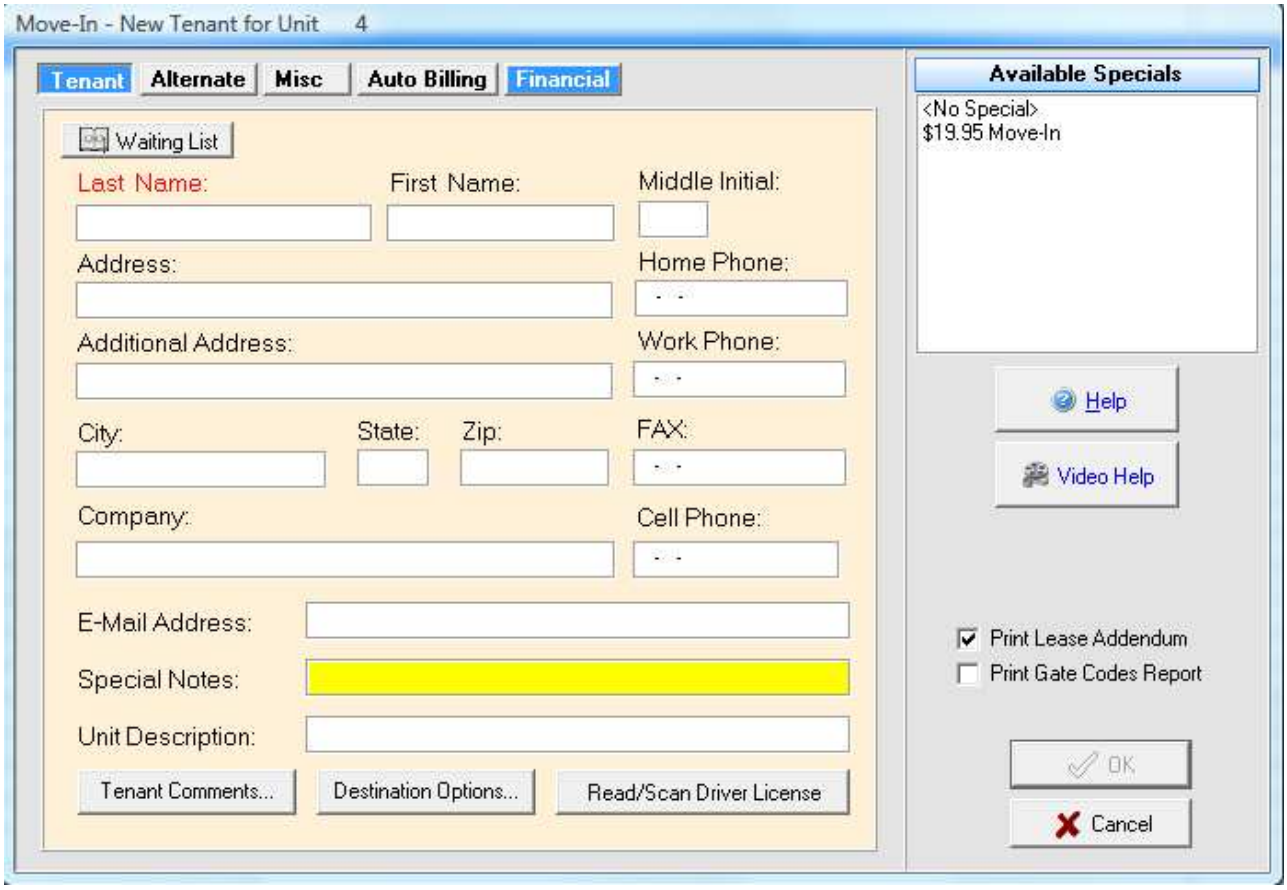
After this is done you may get a window asking if you wish to return this person to the Waiting List. Click the Yes button to do so, or No to go back to the main screen without adding them to the Waiting List.

MOVE-IN

This section walks you through the process of moving a new tenant into Express. As with many features in Express, there are several methods to achieve the same action. Below is the most common method for processing a move-in.

IMPORTANT NOTE: *When you are going through the Move-In process pay careful attention to each tab. Any items that are in RED are required fields and must have information entered into them.*

To start the move-in process, click on a vacant unit, the Move-In icon  above the information pane on the lower right. The move-in form will then appear:



TENANT DETAILS

This window allows you to enter basic information about the tenant. Last Name is the only required **field by default on this tab. Once you have filled in all relevant information, click the** Alternate**,** Misc.**,** Auto Billing, **or** Financial **tabs at the top of the screen to continue the Move-In process.**

Use "Additional Address" if the tenant's address is too long to fit into the first Address field.

If the customer is already on the "Waiting List" you can click that button at the top of this screen to auto-populate the tenant's information from the waiting list.

You can enter notes on the new tenant by clicking on the **Tenant Comments** button near the bottom of the form.

The **Destination Options** button can be used to specify whether you want to print or e-mail the various printouts (e.g. receipts) to the tenant.

Also there is a button there for **Read Driver's License**. This is an included module in Express Professional and available as an optional module in Express Standard.

ALTERNATE CONTACT DETAILS

This tab allows you to enter an alternate contact in case the tenant cannot be reached in an emergency.

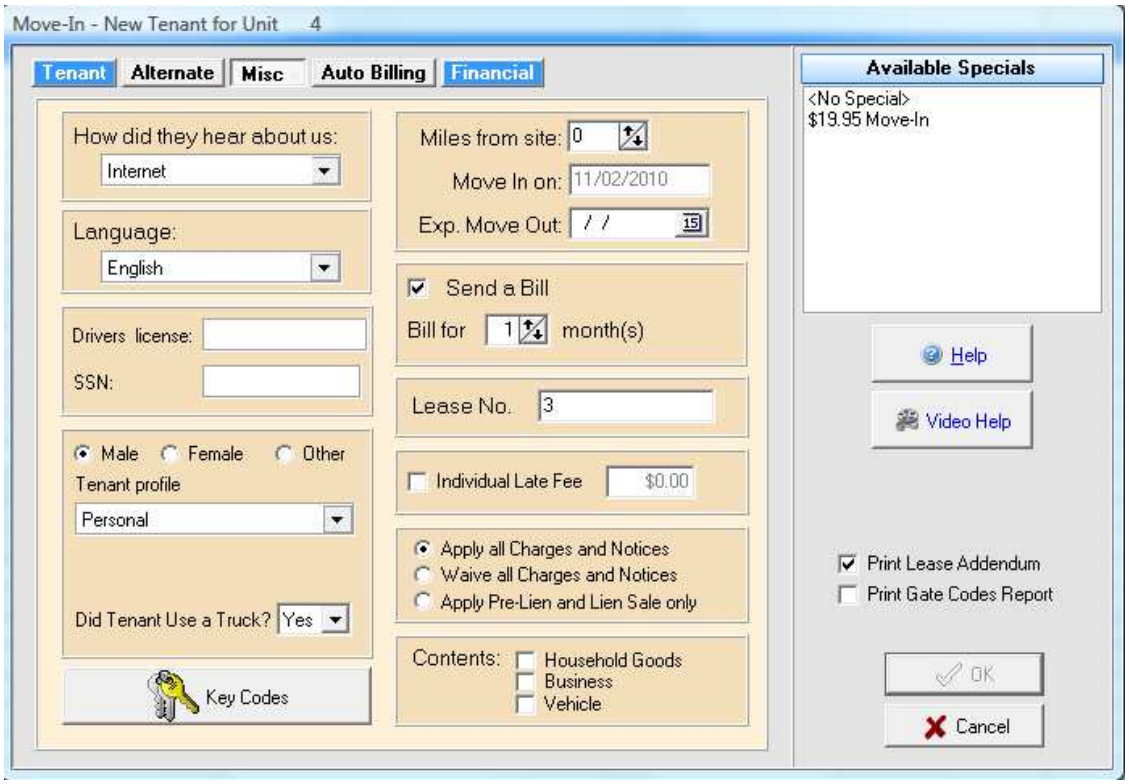
By default the "No Alternate" box will be checked. To enter an alternate contact, uncheck the box.

Enter the contact information in the provided fields and the names of other people allowed access in the bottom field. Only the Alternate Name is **required**.

If you set up any additional information fields during Site Setup, this is where the manager will enter in that information.

MISCELLANEOUS DETAILS

This window allows you to fill in a number of administrative details, as well as statistical information to help you generate advertising reports. There are no required fields by default.



No information is required by default, but more information about the tenant is beneficial to the site, and will make reports more useful. Also, this tab contains a number of important administrative tools such as gate key codes, and invoicing details.

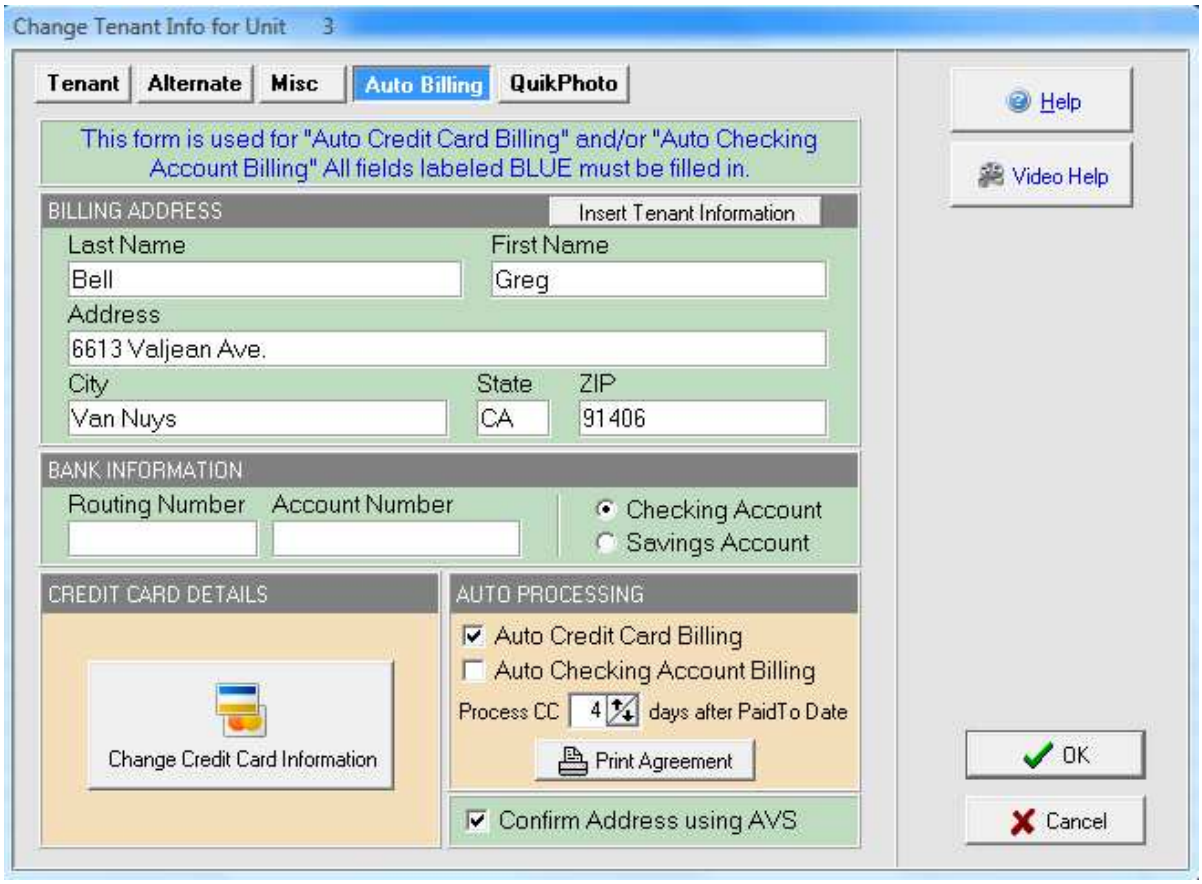
Also on this page you can set a tenant's profile. This will determine what the profile of the tenant or business that is moving in is, and if they are "Tax Exempt."

This tab also allows you to set the Billing Frequency for the selected tenant. By default it is set for 1 month but you can set it for any number of months up to 12 months.

AUTOMATIC BILLING DETAILS

This tab allows you to set up Automatic Credit Card or Checking Account billing for this tenant.

Start by entering in the billing information for the tenant. If this information is the same as the information entered in the tenant tab, you can click on the "Tenant Information" button to auto populate these fields.



If you plan on automatically charging a checking or savings account each month, enter in the routing number and account number for the tenant's account.

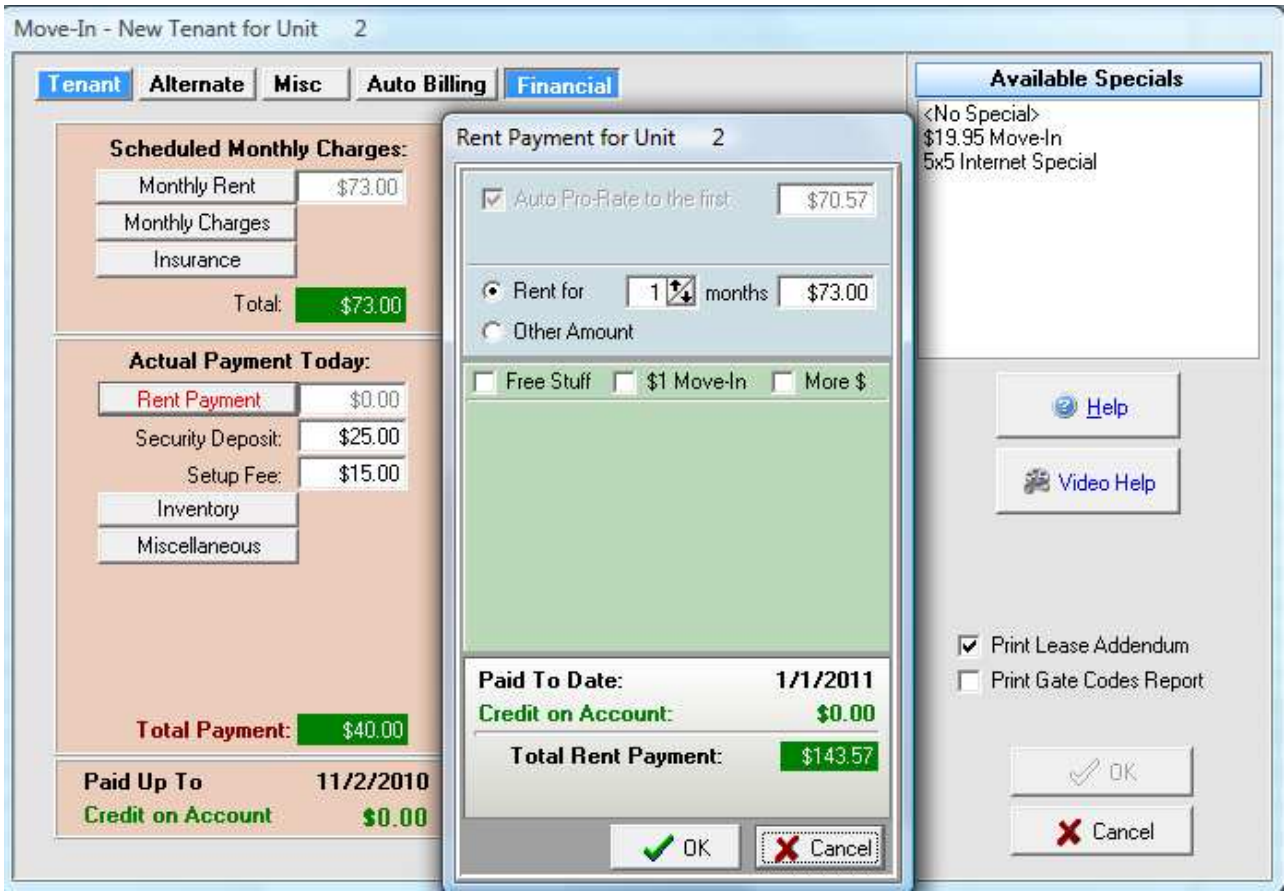
If you plan on billing a credit card each month, you need to follow the credit card integration method that you have activated. If you are using QuikStor Processing, the "Confirm Address using AVS" box will be missing as that is handled on the processing servers automatically.

Last put a checkmark in the box that applies to which type of auto billing you are using, and click on the "Print Agreement" button to print out an Auto Billing Authorization Form.

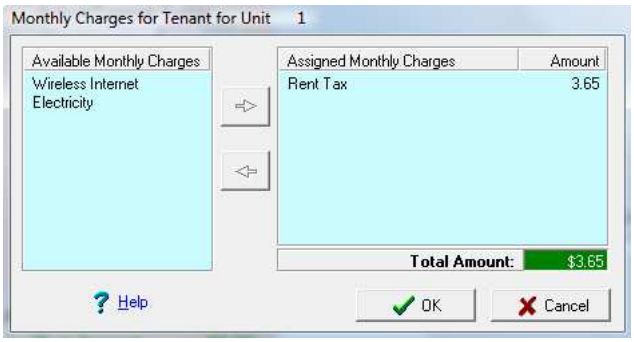
FINANCIAL DETAILS

This tab allows you to set the regular monthly charges (rent, insurance, rent tax, etc.) for the tenant, and also to record the actual payment(s) that they are making on any given day. To complete this tab, you are required to enter a rent payment. You can enter a rent payment of "0", but you must enter something.

Scheduled Monthly Charges (What the tenant will pay each month):



Monthly Rent – This displays the current **Scheduled Rent**, and will allow you to change the rent for this unit. To change the rent, click the "Monthly Rent" button and enter a number into "New Rent" then select either "Retain Rent" to make it permanent, or "Back To Scheduled" and enter the date that the rent will revert to its original rate. The unit will return to scheduled rent for that type when vacated.



Monthly Charges – This adds additional charges to the tenant's rent each month. To add an additional charge, click the "Monthly Charges" button.

Select the type of charge from the left window, click the ➔ button, which will move the charge to the right window. Enter a dollar amount into the field next to

the charge (*Monthly charges can be setup through the* ***Additional Charge Labels*** *tab in Site Setup*). To remove a charge, select the charge in the right window and click the 🡐 button.

Insurance – This adds a monthly insurance charge to the tenant's bill. QuikStor Express integrates with the leading storage industry insurance company, including Bader, Deans & Homer, SafeStor, Storage Property Protection, StorSmart, and MiniCo. If you are not currently signed up with insurance for your facility, please contact your QuikStor account representative for available options.

Actual Payment Today (What the tenant is paying today):

Rent Payment – This will allow you to set the amount paid by the tenant today. You can also apply any special promotional offers or discounts.

NOTE: If you have an Available Special marked in the upper left box, you can double-click that Special and no further action is required in this section.

Begin by checking or un-checking the "Auto Pro-Rate to the first" checkbox. This feature may be disabled if you have "Force Pro-Rate" checked in site setup or if you are a "Strict First of the Month" facility.

Then indicate how many months worth of rent you are collecting today. You can also select "Other Amount" if you wish to receive a specific dollar amount or if you wish to have no money towards this rent and charge just the prorate.

If you wish to create an on-the-fly special or promotion, versus using an Available Special, you check the *Free Stuff*, $*1 Move-In,* or *More $* checkboxes allowing you to apply any promotions or discounts you wish to give to this customer.

Once you have checked to make sure that the total rent payment and Paid-to-Date are correct, click the ✓**OK** button to return to the main **Financial** tab.

Inventory – This will allocate inventory to the tenant, so that it can be included and paid for during the Move-In. To add inventory, click the inventory button in the left window, click the ➔ **Next** button, then enter the number of items being purchased and check the price for each item. *You can increase the price for an individual sale but cannot lower it. (Go to Site Settings -> Inventory Setup to lower the default price.*) Clicking ➔ **Add** will move it to the right window. At the bottom of the right window there will be a running total including tax, for all items being purchased. When you exit this screen, the amount will be added to the tenant's total Move-In payment.

Miscellaneous – This allows you to add other miscellaneous charges (set from within **Site Setup -> Additional Charge Labels**) that the tenant will pay during the move-in. These are one-time charges. Enter the amount beside the desired charge to add it, and click the ✓**OK** button to confirm.

When you have completed all of the required information in each of the Move-In tabs, click the ✓**OK** button.

CHOOSE A PAYMENT METHOD

This is the final step in the Move-In process. In this window, you will indicate the payment method your tenant is using.

First, choose a payment method by clicking on Cash, Check, or Credit Card/ACH.

CASH

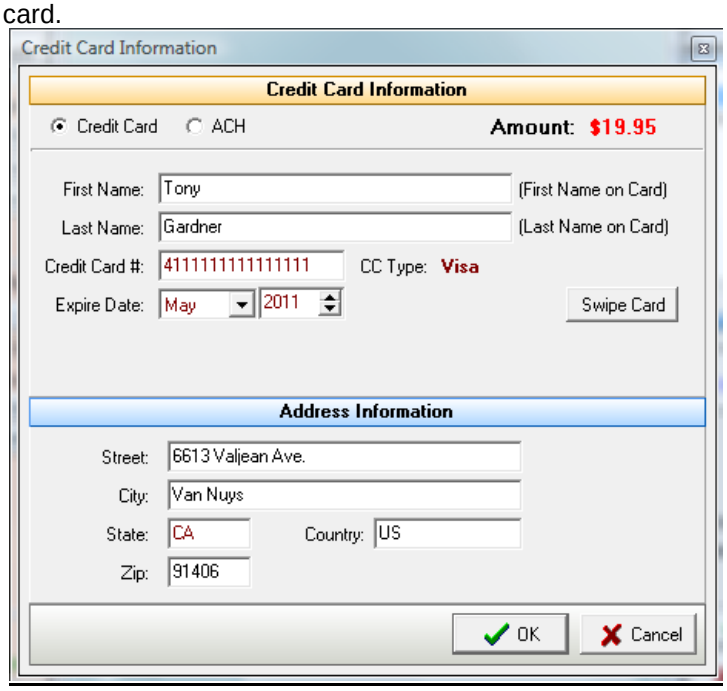
If your Tenant is paying in cash, click on this option.

CHECK

If the Tenant is paying by check, click this option and enter the check number and the Bank Number (these are required to complete the transaction).

CREDIT CARD OR ACH

Click on this option if your tenant is paying using a credit card.



Click on “Use New Credit Card or ACH Account” and this screen will come up allowing you to either enter in all of your credit card information or banking account information to debit your checking/savings account.

Click the “Swipe Card” button if you have a USB card swiper connected to your computer. Use it to swipe the credit card and auto populate the card information.

COMBINED PAYMENT

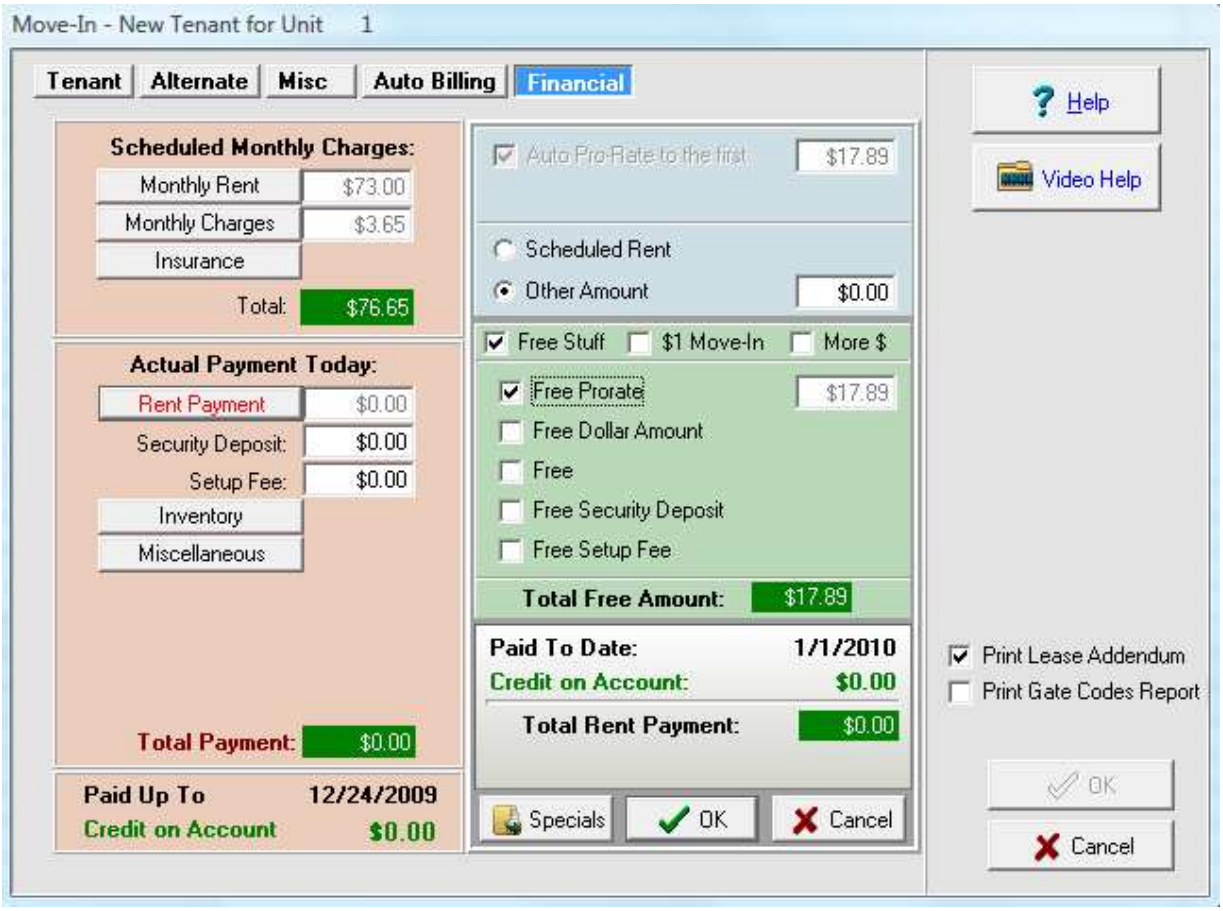
The **Combined Payment** button allows you to enter partial payments using two or more methods. You will still be required to enter Credit Card or Check information if you are receiving payments in these forms.

Confirm the “Amount Remaining to Pay” to make sure that it is correct, and then click ✓OK **to complete the Move-In process.**

HOW TO DO A $0 MOVE IN

There will be times when you want to create a Company Unit or allow someone to move in with no dollars up front. The easiest way to do this is to follow the instructions and screens below:

1. Select the Vacant Unit that you want to work with.
2. Go to the Move-In/Out menu, and select Move In
3. Fill in the Information requested on the “Tenant”, “Alternate”, Misc”, and “Auto Billing” tabs, and then select the Financial tab.
4. Click on the “Rent Payment” button, then in the next form click “Other Amount”. Make this amount $0.00 if it isn’t already, then click OK.
5. Confirm that “Security Deposit” and “Setup Fee” are set to $0.00. Change these to $0.00 if they are not.



6. Check the **Total Payment** amount, this should now be zero, if not, also make sure that your “Monthly Charges”, “Insurance”, “Inventory” and “Miscellaneous” Options are set to zero (there should be no monetary value beside these buttons). Also IF you are STRICT FIRST OF THE MONTH you will have to give a free prorate by:
    a. Click on the “Rent Payment” button
    b. Click on the “Free Stuff” Button
    c. In the “Free Stuff” section put a checkmark beside the “Free Prorate” option. The total below should now read $0.00.

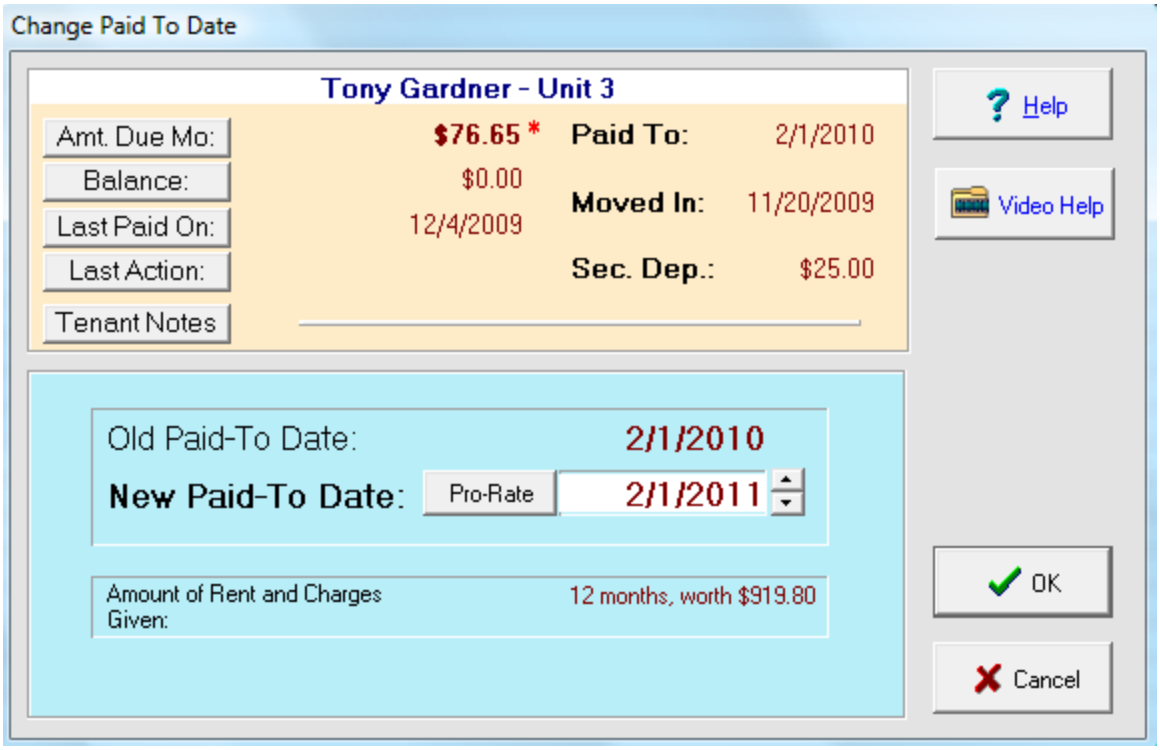
7. If the **Total Payment** is $0.00, click on the OK Button at the bottom of the window.
8. On the next screen, make this a CASH payment and click the OK Button. You are done!

NOTE: This Unit has a paid to date of TODAY; you will likely want to change the Paid-to-Date of this tenant right now. You can do this by:

1. Select the unit that where you performed the zero dollar move-in

2. Right click the unit and select “Change Paid To”.
3. Use the arrows beside the “New Paid-to-Date” amount to change to the date that you desire.

NOTE: if you do not allow partial payments, (or if you are strict first of the month), you can only change their Paid-To Date in increments of one month.



REPRINT LEASE ADDENDUM (K-Y-B)

This function allows you to reprint a copy of a lease addendum for a tenant

Select a tenant from your unit list, go to the Tenant menu on the main tool bar, and click on Reprint Lease Addendum.

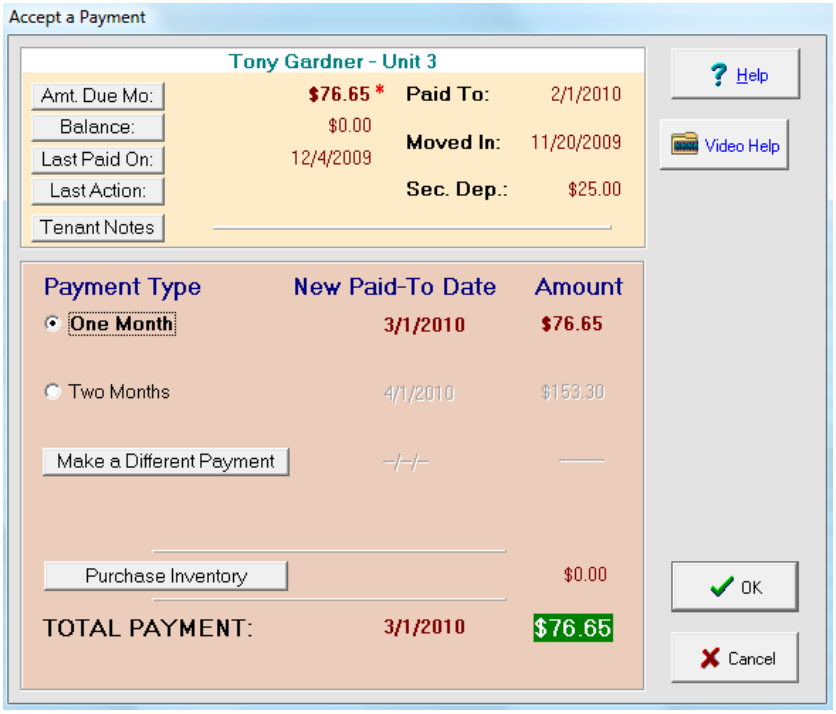
This will automatically either print directly or bring up a print preview (depending on your settings under the printing tab of the Site Setup Section). If the page comes up as a preview, click on the printer icon , and it will automatically print. Click on the ✕ to close out and return to the main screen.

MAKE A PAYMENT

This form allows you to receive a payment from a tenant. You can receive a preset payment, or a different payment if it doesn't fit into the preset payments. You can also add inventory costs to the payment.

Select a tenant from your unit list, go to the Payment menu on the toolbar, and select Make A Payment.

Note: *Check the information at the top of this form to make sure you are applying the payment to the correct tenant.*



First, select the payment type that describes the payment received (one month, one month + late charge, two months, or outstanding balance), or click on the **Make a Different Payment** button if it doesn't fit into the listed payment types. If the tenant has a credit on their account, it will appear in a highlighted line below the payment type. You may check the box next to "use existing credit…" to apply the credit to this payment.

If there has been any purchase of inventory that needs to be added to this payment, click on the **Purchase Inventory** button and add the inventory purchased.

When you have confirmed that the information is correct, click the ✓OK **button to confirm.**

MAKE A DIFFERENT PAYMENT

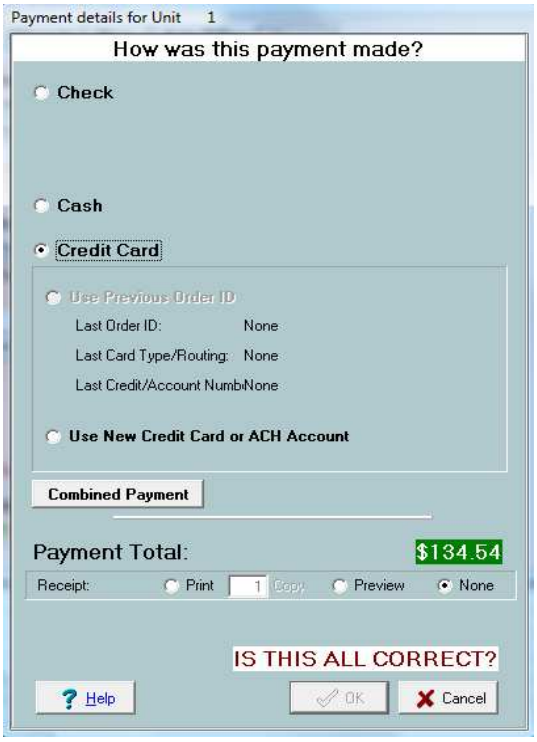
This section allows you to enter a payment that does not fall into any of the payment types on the previous screen.

In this window you can receive a payment in a dollar amount that does not match any of the pre-set payments on the previous screen (one month, one month + late charge, two months, or outstanding balance). You can also assign the payment by category to accounts such as Rent and Charges, Security Deposit, and Credit.

Next to Rent and Charges is the Details button. If you click this button, a calendar will appear which allows you to choose the new Paid-To-Date that you would like to calculate the payment for. QuikStor Express will automatically calculate the correct charge to pro-rate to that date. This feature works for sites that allow partial payment only.

Note: *Do not enter inventory purchases on this screen. You will be given an opportunity to enter that after you have completed this section.*

Finally, check the amounts you have entered and note the total and new Paid-To-Date given at the bottom of the window. Click ✓OK to confirm your choices. You will then be taken back to the "Make a Payment" window with the total you have just confirmed.



CHOOSE A PAYMENT METHOD:

This is the final step in the payment process. In this window, you will indicate the payment method your tenant is using.

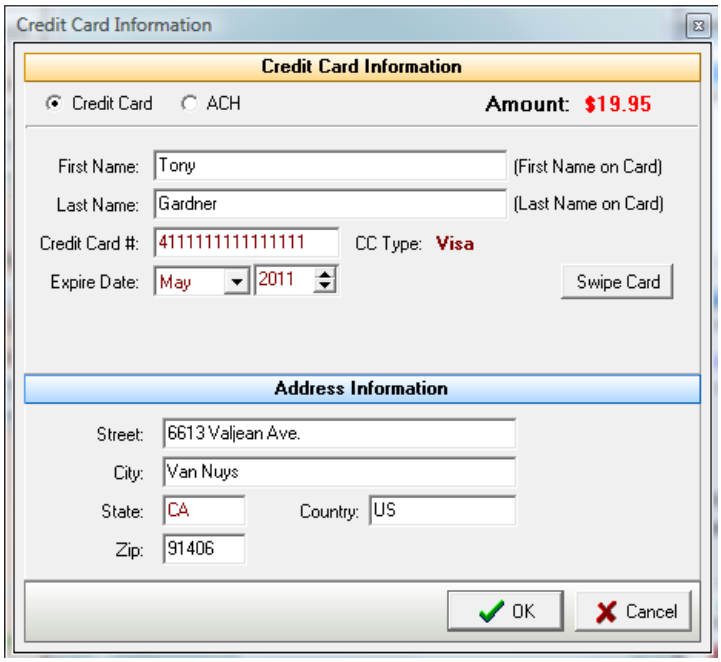
First, choose a payment method by clicking on Cash, Check, or Credit Card/ACH.

Cash – If your Tenant is paying in cash, click on this option.

Check – If the Tenant is paying by check, click this option and enter the check number and the Bank Number (these are required to complete the transaction).

CREDIT CARD OR ACH

Click on this option if your tenant is paying using a credit card.



CREDIT CARD OR ACH

Click on this option if your tenant is paying using a credit card.

Click on "Use New Credit Card or ACH Account" and this screen will come up allowing you to either enter in all of your credit card information or banking account information to debit your checking/savings account.

Click the "Swipe Card" button if you have a USB card swiper connected to your computer. Use it to swipe the credit card and auto populate the card information.

COMBINED PAYMENT

The **Combined Payment** button allows you to enter partial payments using two or more methods. You will still be required to enter Credit Card or Check information if you are receiving payments in these forms.

Confirm the "Amount Remaining to Pay" to make sure that it is correct, and then click ✓OK **to complete the Move-In process.**

EMAILING RECEIPTS

If you have completed the Internet Setup of QuikStor Express then also on this window you will have the ability to enter in an email address where the tenant would like the receipt for this payment sent to. This goes for any type of payment that you make. Simply enter in the email address and when you are done it will place a copy of the email in your QuikStor Outbox (or Outlook if you have the Outlook Integration module) to be processed automatically during the overnights (if applicable), or for you to manually send.

Check the amount to make sure that it is correct, and then click the ✓**OK** button to confirm.

HOW TO GIVE FREE RENT TO EXISTING TENANTS

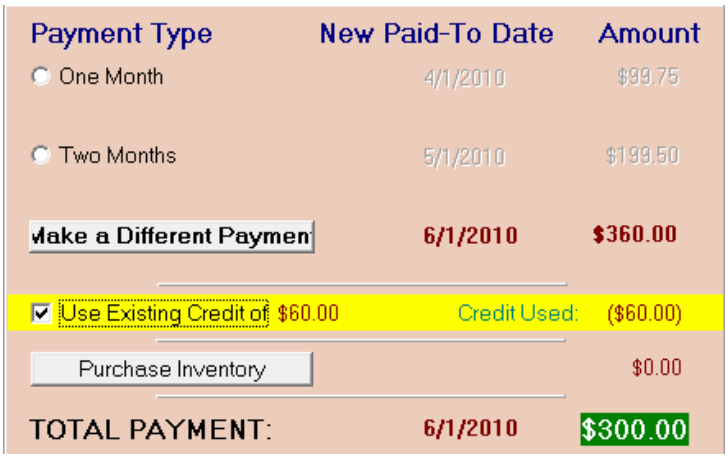
There are two ways to process payments that have free rent in Express. For example "pay for X number of months rent, get Y number of months free". The first is to change the paid-to date of the tenant forward the number of months they receive free, and then print a Complete Tenant Report as a form of receipt. The second option is to follow the process outlined below:

Let's say you have a special that allows someone to pay for 10 months and receive 2 months free rent. A tenant that already has a unit at a $30/month rental rate wants to make use of this special.

First, calculate the dollar value of the rent and charges they will be receiving free of charge. In this case, the tenant's rent is $30, so the number you want to keep track of is $60.00. Credit the tenant that amount by going to Payment -> Tenant Credit.

Now that your tenant has a $60 credit on their account, you want to take a payment. In the payment screen, go to *Make a Different Payment*. In the Rent and Charges category, you want to enter the FULL DOLLAR AMOUNT for the rent they WOULD be paying if there were no special. In this case, the total number of

months being “paid for” is 12, and 12 x $30 is $360, so you would enter $360.00 into the Rent Field. Click OK. Now that you’re back in the Payment screen, put a check in the box in the highlighted “Use existing credit” line, which applies the credit you’ve already put on the tenant’s account to the current payment. Now you should see a screen that looks like this:



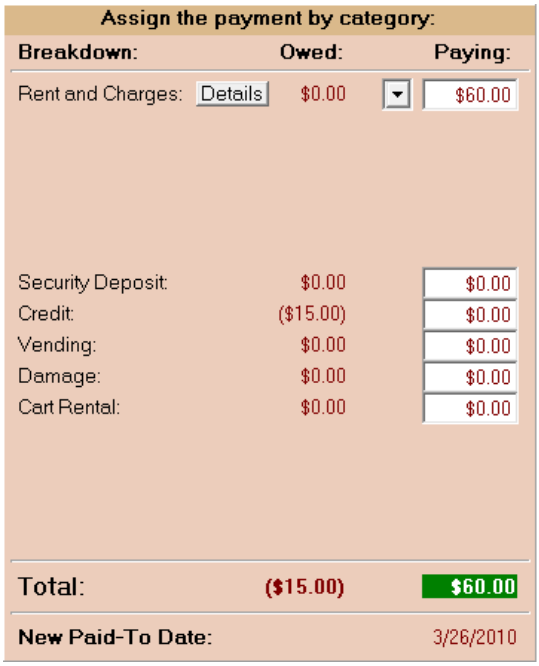
Finish processing the payment as you usually would. The receipt will show the paid-to date moving 12 months, with only 10 months of rent payment being accepted from the tenant.

Which method you use is your choice.

Note: *Please remember that while you may choose to discount rental rates as you wish, insurance will have to be paid for as if there were no sale on rent.*

HOW TO MAKE A DIFFERENT PAYMENT WITH CREDIT

The most important things to remember about this type of operation are the ways that credit works:



1. Credit can only be applied to payments made to the Rent and Charges category.
2. Credit is applied *after* the Make a Different Payment screen is filled out, so you need to have calculated how much money to apply to Rent and Charges prior to getting to that step.

In other words, if a tenant has a check for $25, and a credit for $5, then when you go into the Make a Different Payment screen, you will need to enter $30 into the Rent and Charges category.

Here’s the process. Let’s say you have a tenant that has $15 credit and gave you a check for $45. Go to the payment screen, and click on “Make a Different Payment.”

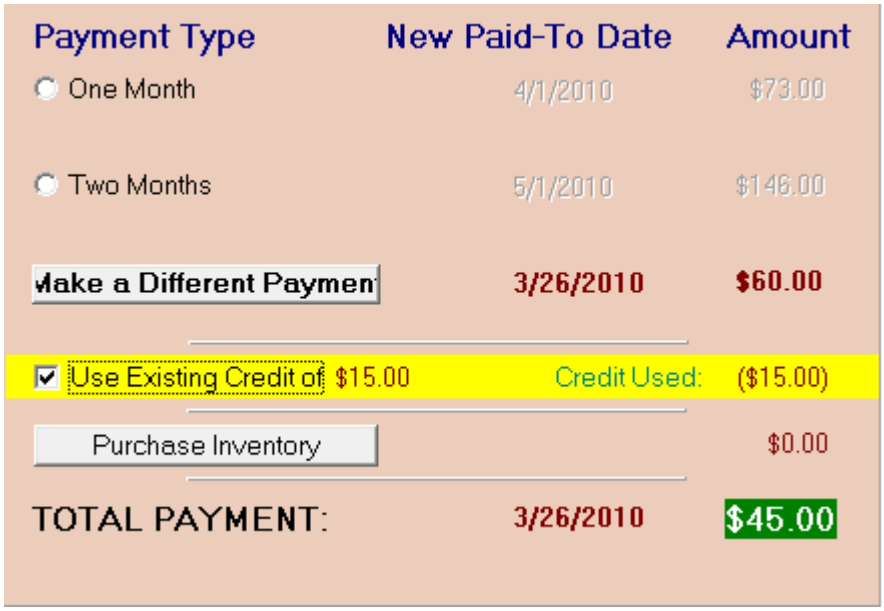
Notice in the screen to the left that the amount of credit ($15) is shown in the “Owed” column next to “Credit.” Input the TOTAL amount you wish to be applied to the Rent and Charges category – in this case, $45 + $15 = $60, so I have entered $60. Input any other categories you wish to distribute this payment amongst.

If Express forces some money into the Credit field because it

would cause a partial months' or partial days' payment, allow it to do so.

Click OK.

Next is the payment screen. Click to put a check in the "Use Existing Credit" field. The screen will then look like this:



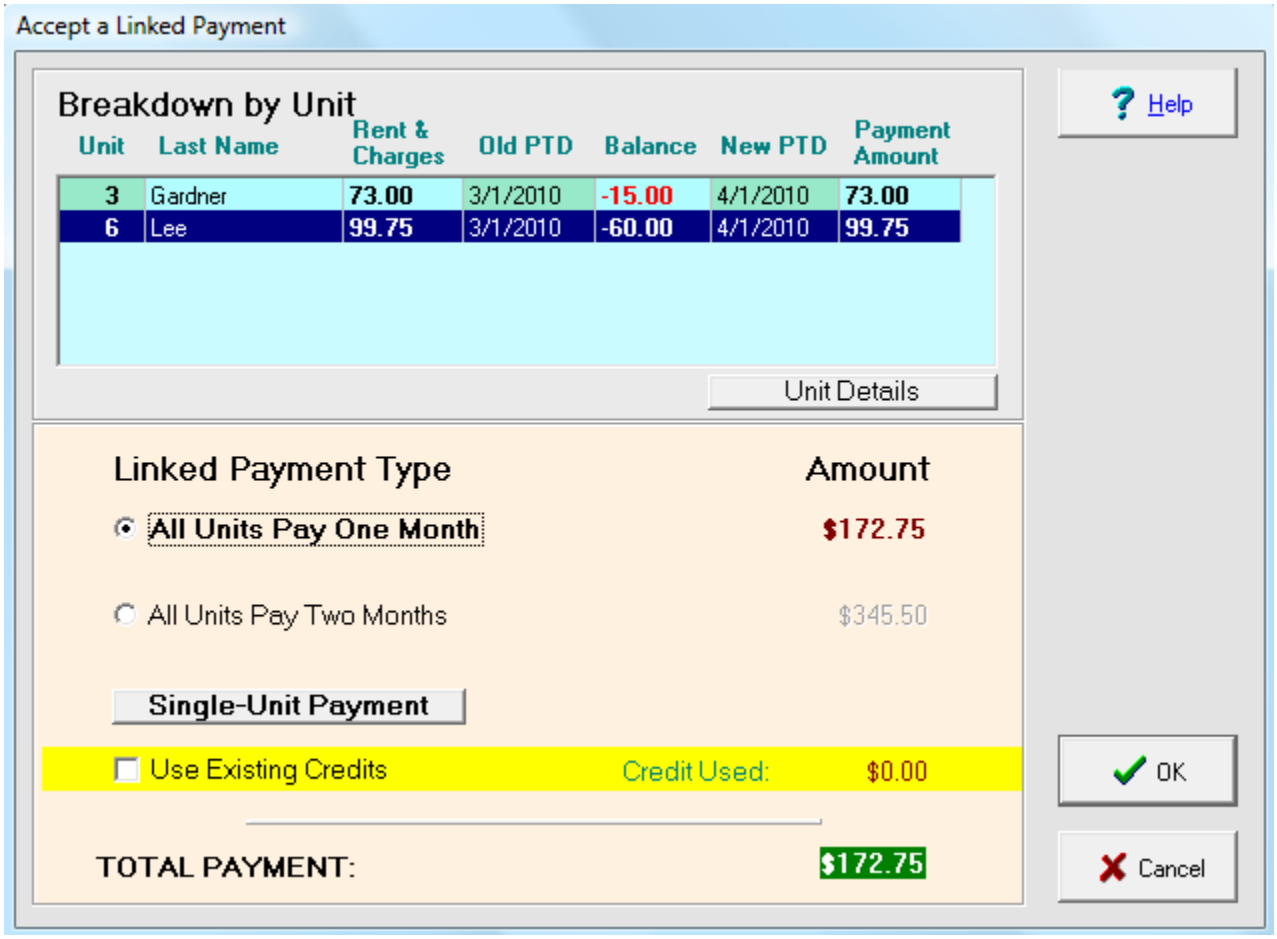
The credit is applied, and the total payment now equals the amount desired. Finish processing the payment as normal.

If you wish to try this process without concerns of what it might do to live tenant data, please go to Help -> Training Mode -> Switch to Training Mode and experiment first.

LINKED UNIT PAYMENT

This function is very similar to the regular payment function but allows you to take one payment for multiple units that are linked.

To get to this function, select a unit from your list that is linked to another unit, then go the Payment menu and select Make A Payment. You will get a window similar to this:



This window gives you a quick breakdown of each of the units that are linked together. The break down consists of the unit numbers, last name of the current tenant, rent & charges, old paid to date, the new paid to date, and the payment amount for each unit. If you would like to take more of a look at an individual unit in this list, select that unit and click on the Unit Details button.

By default the "All Units Pay One Month" is selected and gives you the total amount that is owed for all units. If you would like to make a payment for two months for these units select that radio button. Once you have made your selection, click on the ✓OK button to continue. You will then get the screen where you can select which type of payment you wish to take, select the type then click ✓OK and the payment will be accepted.

If you would like to make a payment for just one of the units, select that unit from this list, and click on the Single-Unit Payment button, and the regular payment screen will come up where you can enter a unit payment as normal.

If you wish to take a payment for both linked units that is not a standard 1 or 2 month payment you will need to follow the steps below. This section explains two scenarios that you may encounter:.

THE AMOUNT ON THE CHECK IS MORE THAN THE AMOUNT OWED.

If the check amount is more than the total rent and monthly charges owed to you on all linked units, use the following method to accept payment. For example, your tenant sends you check #505 for $100 when they only owe you $90. Take the payment as normal, for the amount Express wishes you to – in this case, $90. Input the check number as 505. When this payment is completed, make another payment on one of the

linked units. Choose “Single-Unit Payment,” then “Make a Different Payment.” Under the Rent category, enter the amount left on the check. In this case, $10. Take the payment as normal, including the check number – 505.

THE AMOUNT ON THE CHECK IS LESS THAN THE AMOUNT I’M OWED.

If the check amount is less than the total rent and monthly charges owed to you on all linked units, you will need to do a Single Unit Payment for each unit, dispersing the money however you wish. You can take a full month’s payment on one unit and disperse the remaining funds among the other unit(s), or you can disperse the funds evenly, or whatever combination you wish. For check # and banking #, insert the same information in each payment.

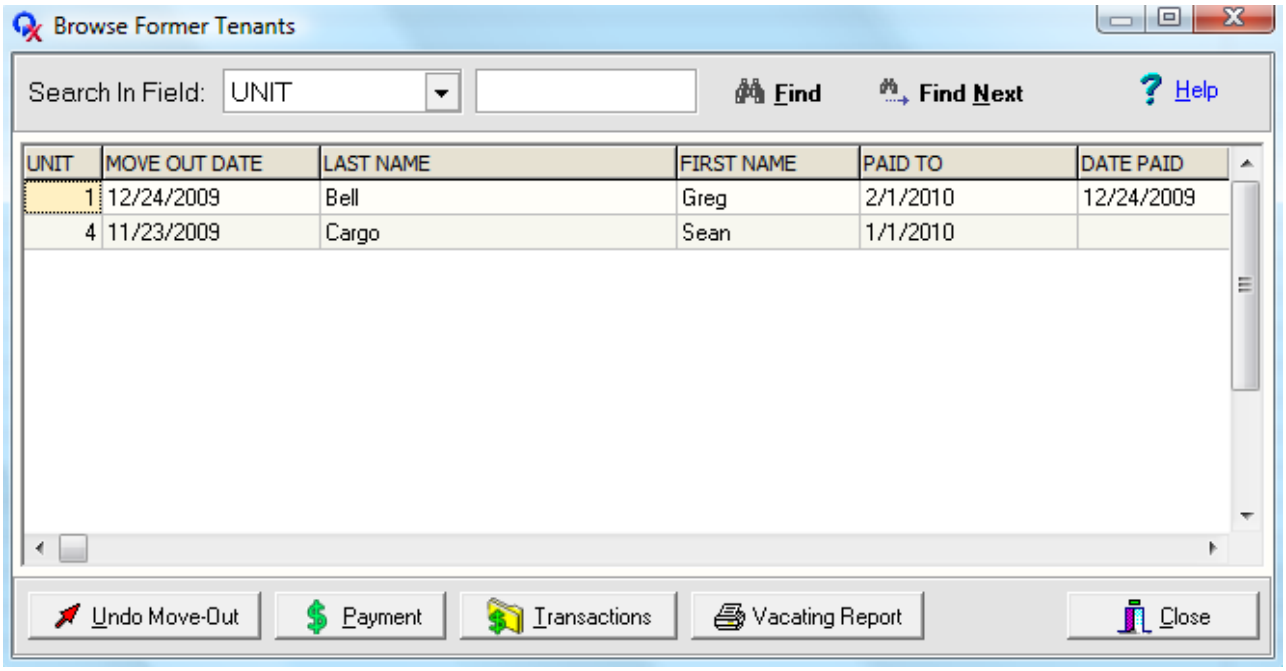
For example, if you have a tenant renting three linked units at $25 each (for a total of $75 per month), and they send you a check for $60, you could make the first two units current and have the third unit make a payment of $10 ($25+$25+$10=$60), or you could keep all three units delinquent with a $20 payment on each unit ($20x3=$60). It’s entirely up to you.

The downside to both of these processes is that if there is an NSF on this check, you will need to NSF all payments individually, and not apply the NSF fee for all but one of the instances – or credit the NSF fees that shouldn’t have been applied.

FORMER TENANT PAYMENT

This feature allows you to accept a payment for a tenant that has moved out with a remaining balance. This can be from an auction, lien, or any number of reasons.

To get to this window go to Payment -> Former Tenant Payment. You will see a screen similar to this:



TIP: *You can also get to this window by going to the Browse Data menu on the top toolbar and selecting Former Tenants*.

Scroll through and select the tenant you wish to work with. If you want to sort this window a specific way, click on the bar that you wish to sort it by, such as UNIT, LAST NAME, etc. Once you have selected the

former tenant that you wish to make a payment for, click on the 

icon. You will then be able to make a payment in the next window.

Once you are finished with your payment you will be back at the main screen of QuikStor Express. If at any time you wish to cancel any of the actions, you may either click on the Cancel button within the payment option screen or on the Close button on the Former Tenant window.

REPRINT RECEIPT

This option allows you to view the full transaction history of your facility, view individual transactions, and reprint receipts from these transactions.

Go to Payment -> Reprint Receipt.

This window shows you all of the transactions that have been made. You can reprint the receipt for one of these transactions, or view it in a more detailed format.

To see more detail on an individual transaction, click on the record to highlight it and click the ↗ **View** button, or double click on the transaction. When you have finished viewing this transaction, click the ✓**OK** button.

To reprint receipts for payments, click the **Reprint Receipt** button. This button will not appear unless the transaction is a payment (or another transaction which produced a receipt).

Finally, you may perform either of the actions above by **right** clicking the transaction, and selecting View Transaction or Reprint Receipt (where applicable).

To exit this window, click the Close **button.**

REPRINT ALL RECEIPTS FOR A DATE RANGE

This function is used to reprint all payment receipts for a specified date range.

Go to Payment -> Reprint all Receipts for a Date Range.

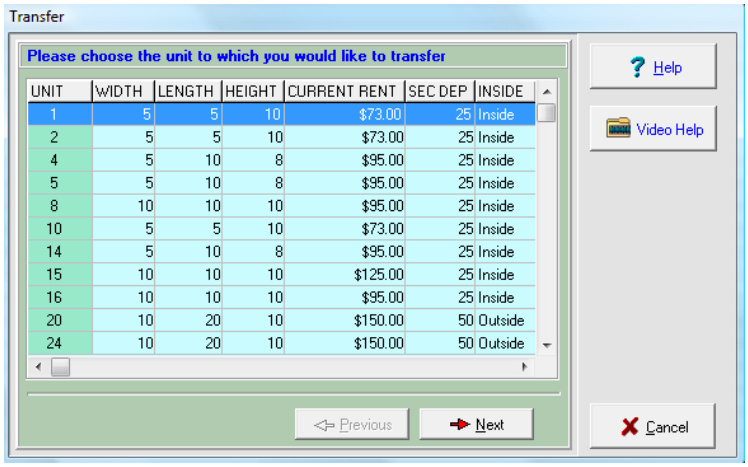
This function allows you to reprint all of the receipts for a certain date range that you select. A date range window will pop up so that you can select the date range you wish to work with. After selecting the date range, click the ✓**OK** button to continue or the ✗**Cancel** button to go back to the main screen. Once you hit the ✓**OK** button, it will automatically run through all of the receipts for the specified date range and print them. Once this is finished it will take you back to the main screen.

TRANSFER

This window allows you to transfer a tenant from one unit to another, and add the appropriate charges or credits.

Select a unit from your list and go to Move In/Out -> Transfer.

Sometimes a tenant needs to move out of his unit and move into a different one. Maybe he needs more space, or he wants to change from the second floor to the first floor. Whatever the reason, this is the function you will use to do the transfer.



Select the unit you would like to transfer this tenant into by clicking on it (If you do not see the unit you wish to transfer to, check to make sure it is not already occupied). When you have selected a unit to transfer to, click the ➔ **Next** button.

The next screen will show you the charges associated with the transfer, such as the monthly rent, monthly charges, insurance, and a transfer fee if applicable. For the transfer fee you can set a default fee to apply to all transfers by going to Site Setup–> Change Site Setup -> Technical and apply the value of your choice to line 16 "Default Transfer Fee"

The last screen, check to make sure all of the information is correct. Confirm that you are transferring from the correct unit and that all the rental information is accurate.

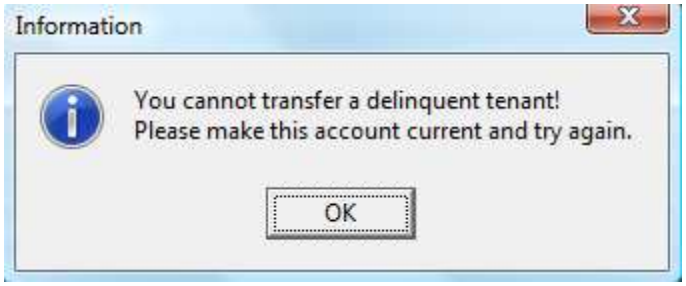
Note: *Even if the tenant transfer results in the tenant owing money (i.e. they are moving into a bigger unit), you will not be automatically taken to a payment screen. The tenant's account will be debited (or credited, if the transfer results in a refund) and you will need to receive a payment to eliminate this balance.*

If the scheduled rent of the unit you are transferring into is different than what you want the tenant's rent to be, you will have to adjust the rental rate during the transfer by clicking on the Rent button.

Once you have made sure everything is correct, click ✓Transfer button to confirm the transfer.

DELINQUENT TENANT TRANSFER

QuikStor Express does not allow you to transfer a tenant who is delinquent to a new unit. They must be current to be able to transfer. If you try and transfer a tenant that is delinquent you will receive this message.



Click OK and it will take you back to the main screen of Express.

There are two ways workarounds to this scenario. They are explained below.

1. Make a payment to get the tenant current. Have them pay their outstanding balance before doing the transfer. Once that is finished you can then complete the transfer as normal. If they are moving to a unit with higher rent, the transfer will result in a balance, which the tenant will then need to pay. If they are transferring to a unit with a smaller rent, the result will be a credit that can be applied next time they pay rent.

2. The second method would be to change the tenant's Paid-to-Date to current by selecting the tenant and going to Payment/Change Paid To. Once that is complete, finish the Tenant Transfer as normal. Then go back in to Change Paid To and move the tenant's Paid-to-Date back to what it was before the transfer.

   PLEASE NOTE: this is not the recommended method, as it does not charge an accurate amount of rent for the exact amount of time the tenant was in each unit. Option 1 is the preferred method.

UNDO TRANSFER

If you have either transferred a tenant from one unit to an incorrect unit or the tenant just decides not to go into that unit, you will use this feature to correct the transfer.

In QuikStor Express there is not a one-step option for Undo Transfer to prevent accidental actions. To do this process, you will have to use the steps below.

Upon completion of the initial transfer of the tenant, if this is not the unit that the tenant wants to transfer into or the tenant changes their mind, you will have to do another transfer into the correct unit, or into their old unit.

To do this, go to the Move-In/Out menu and select Transfer. Choose the correct unit you want to transfer into go through the normal process of a Transfer. Once the unit is transferred into the new/correct unit you will have to address the fees (if applicable) for this transfer.

If you were transferring into a bigger or smaller unit, there would be rent differences with the units, so there could be monies owed. What you will need to do is either credit or debit these fees after the transfer is complete so there is no outstanding balance.

NOTE: *If the scheduled rent of the unit you transferred out of was different than the tenant's rent at the time of the transfer, you will have to adjust the rent rate to where it was during the transfer process.*

HOW ARE THE TENANT'S TRANSFER NUMBERS CALCULATED?

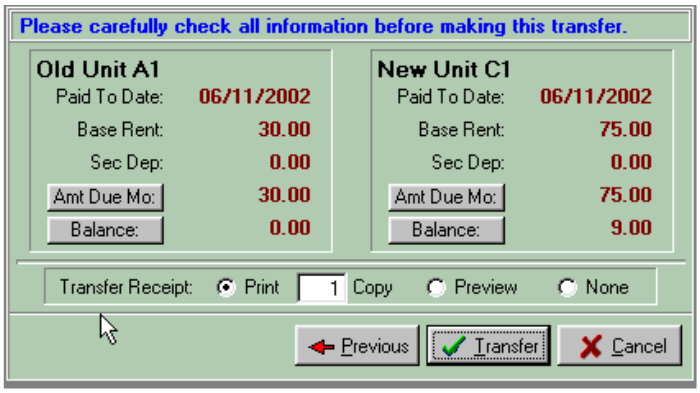
QuikStor Express calculates the post-transfer amount owed to a tenant, or the amount a tenant owes to the facility, in the following way:

First, any credits or debits are pulled out of the equation. They will be transferred exactly as they started.

Then the daily rent is calculated for the unit being vacated, and the unit being moved into. Let's say, for example, that a tenant is moving from unit A1 with a rent rate of $30.00 per month to unit C1 with a rent rate of $75.00 per month. The daily rate is calculated by taking the monthly rent (with all monthly charges) and dividing by the number of days in a month, which Express always assumes is 30. So A1 has a daily rate of $1.00 ($30.00 / 30) and C1 has a daily rate of $2.50 ($75.00 / 30).

In order to simplify tenants' accounts, Express keeps the current Paid-to- Date throughout the transfer. In order to do that, it calculates the amount of rent that has already been paid and subtracts the amount due in the new unit for that same period. In other words, if there are six days between now and the tenant's Paid-to-Date, then our example tenant has paid for six days rent, or in this case $6.00 (6 days x $1.00 = $6.00). Six days at C1's Daily rate of $2.50 means that to get to the same Paid-to-Date, the tenant needs to have paid $15.00 (6 days x $2.50 = $15.00). They've already paid $6, so when the transfer is complete, they will owe the facility $9.00 ($15 – $6 = $9).

The following transfer was performed on 06/5/2002, which is 6 days before the Paidto-Date. Note that the Paid To Date (PTD) does not change as a result of the transfer:

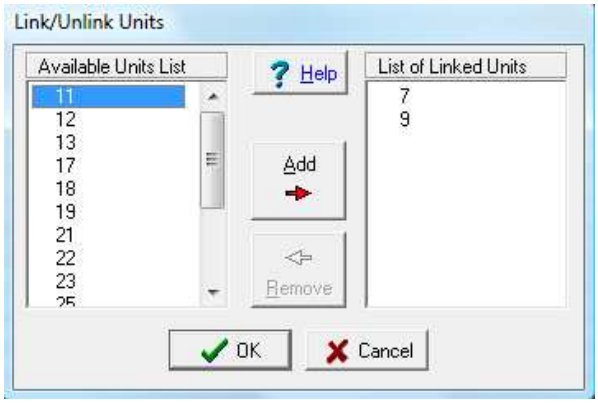


So the full formula looks something like this:
(Old Daily Rate) = (Old Monthly Rate) / 30
(New Daily Rate) = (New Monthly Rate) / 30
Amount Owed to Site = ((New Daily Rate) x (Days to PTD)) – ((Old Daily Rate) x (Days to PTD))

You math experts out there might recognize that this can be simplified, like so:
Amount Owed to Site = (New Daily Rate – Old Daily Rate) x (Days to PTD)

As stated above, any other credits or debits are added or subtracted from this amount.

LINK/UNLINK



This window allows you to Link or Unlink units together.

Go to the Tenant -> Link/Unlink.

Often a tenant will rent more than one unit at the facility. In such a case, you might have his units linked so that the tenant can pay rent for all of their units with a single payment.

Once you have opened this window you can choose if you want to link or unlink units. If you want to link units select any number of units from the left hand side of the window and click the ➔ **Add** button. If you wish to remove any of these, select the units from the right hand side of the window and click the 🡸 **Remove** button.

When you are finished editing this window click the ✓OK **button.**

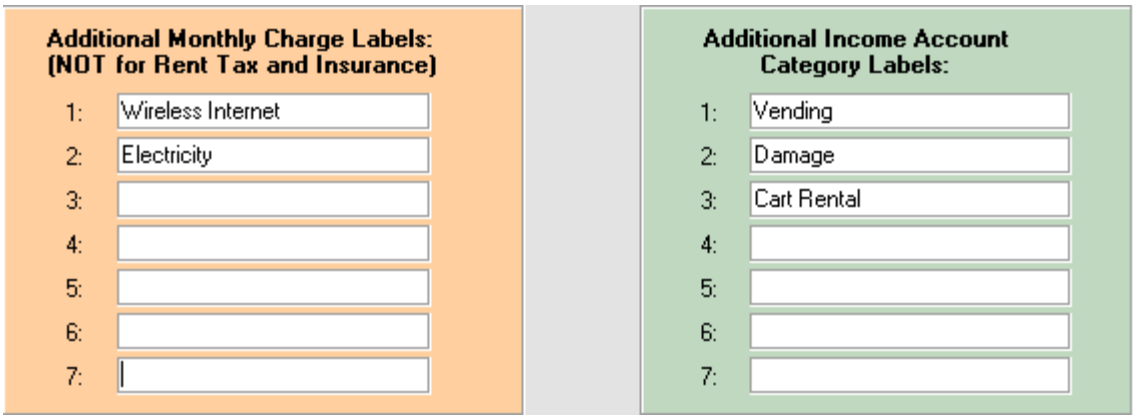
Monthly Charges

Monthly Charges are charges that you setup; to be applied to a tenant's rent category either during a move-in or to an existing tenant.

QuikStor Express can automatically apply a monthly charge (such as electricity, water, or Internet) to any or all of your units. Here is the procedure on how to set up standard monthly charges:

Go to File -> Site Setup -> Change Site Setup. Select "Additional Charge Labels."

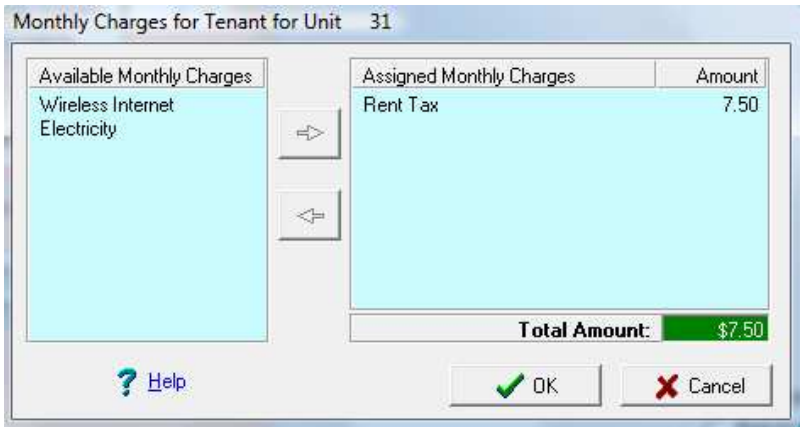
The window that you see will look like this:



On the left side you have seven fields to enter labels for additional charges. Starting with number one, enter the charges you wish to be able to use on any given unit. You are not required to use any or you may use all on any tenant. When you are finished, click on Save & Exit.

APPLYING A MONTHLY CHARGE DURING A MOVE-IN

Now that Express knows what monthly charge labels you wish to use, you need to tell it where to apply them. Express will assume that you do not wish to apply any monthly charges to a tenant unless you tell it to. On the Financial tab of the move-in process, click on the Monthly Charges button. This will bring you to a screen that looks like this:

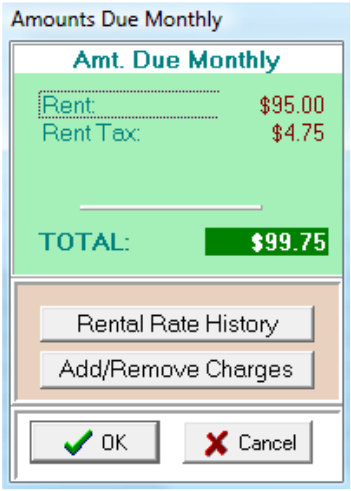


Select the Monthly Charge you wish to apply and click on the right arrow ( ) button. This will move that charge to the right side of this window, and allow you to edit how much the charge is for. Type the amount in the white area where the cursor is blinking. You can then choose another monthly charge or click on OK to continue with the move-in.

If you accidentally enter the wrong amount, don't worry. Just double click on the dollar amount displayed, and Express will let you edit the amount. If you wish to remove a monthly charge completely, select that charge and click on the left arrow ( ). Click on OK when you are finished.

APPLYING A MONTHLY CHARGE FOR AN EXISTING TENANT

Select the tenant you want to work with. On the bottom right side of the main screen, select the General tab. Click on the Amt Due Mo: button. That will bring you to this screen:



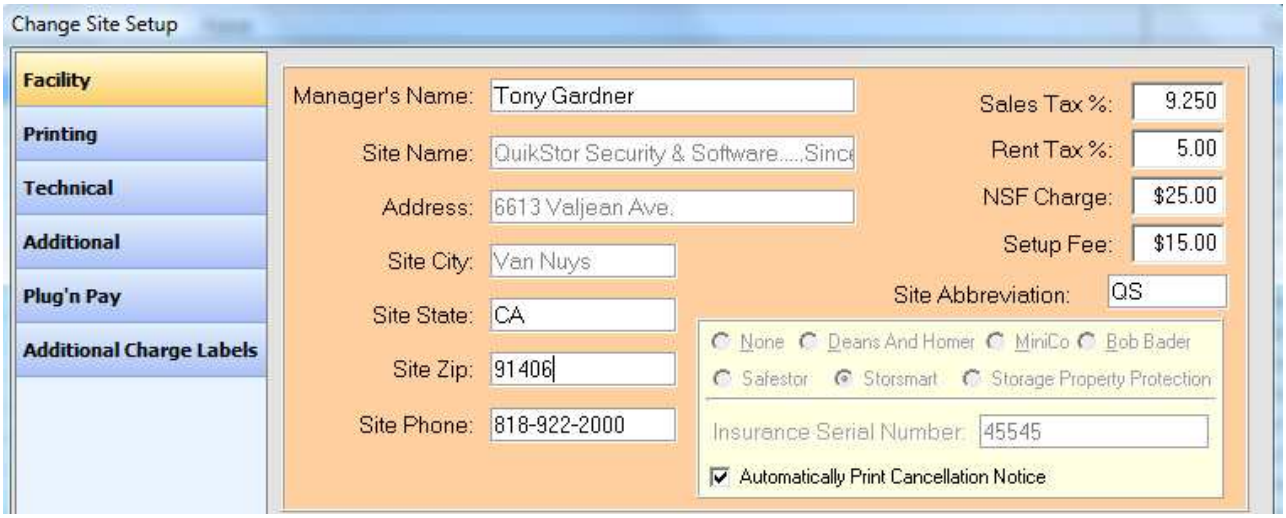
Click on the Add/Remove Charges button. You should now see the screen shown above. Follow the instructions above to add, change, or remove monthly charges.

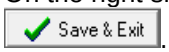
RENT TAX

QuikStor Express can automatically apply a rent tax to any or all of your units. Here is the procedure on how to set that up:

Go to File ->Site Setup -> Change Site Setup - > Site

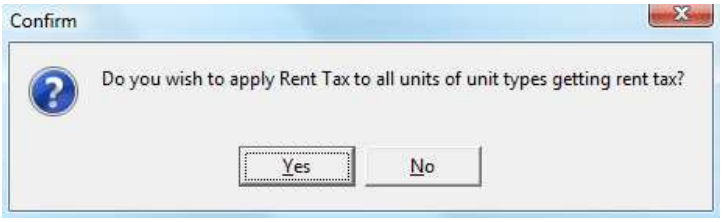
The top of the window that pops up will look like this:



On the right side, the second option down is Rent Tax %. Enter your rent tax percentage. Click on 

.

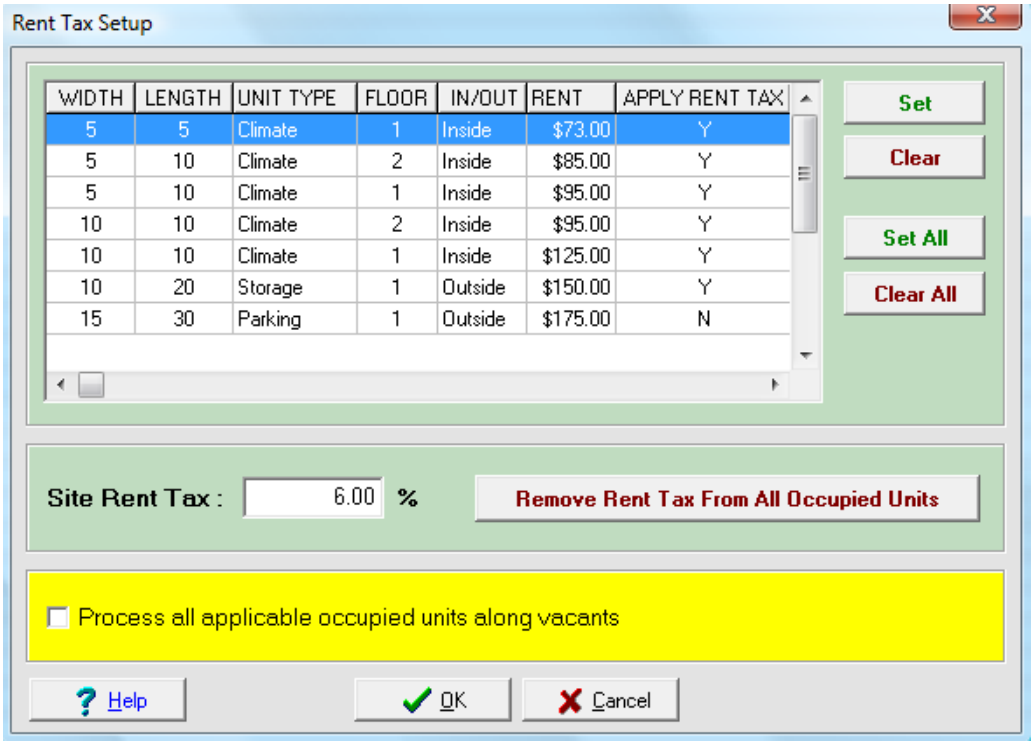
Express will then ask you:



If you wish to have this rent tax applied to ALL your units, click on Yes, and you're done! Rent Tax will be applied to all units, vacant and occupied. If you wish to apply this to some units and not all, click on No and continue with the next steps.

APPLY RENT TAX TO CERTAIN UNIT TYPES

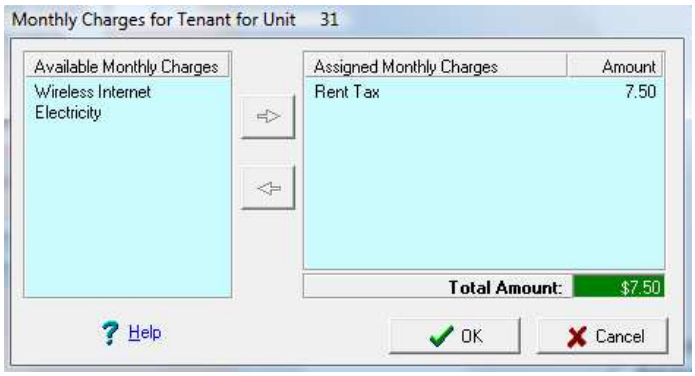
If you would like to only select certain unit types to tax, go to **File** -> **Site Setup** -> **Rent Tax Setup**. You will see the screen below:



Here you can select which unit types you would like to apply rent tax to. You can also select an effective date to remove rent tax from all occupied units or process all applicable occupied units as well as vacant units once you make the change.

APPLY RENT TAX DURING A MOVE-IN

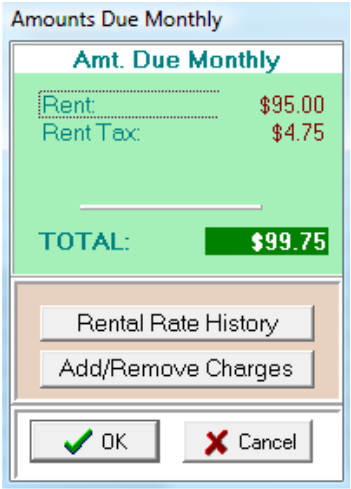
If you have chosen to exclude certain unit types, but still need to apply it to certain units during a move-in you will use this procedure. Tax will also be automatically applied to all vacant units of an enabled type, so when someone new moves in, they will have Rent Tax added unless you specify they shouldn't. To add or remove rent tax during a move-in, click on the Monthly Charges button. This will bring you to a screen that looks like this:



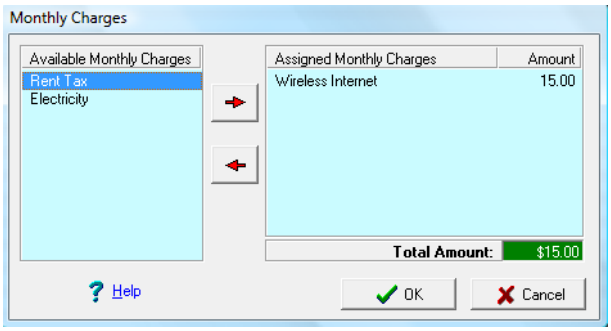
Select "Rent Tax" and click on the left arrow ( ) button to remove it. Conversely you can do the reverse to add it. Click on OK and continue with the move in.

APPLY RENT TAX TO AN EXISTING TENANT

Select the tenant you want to work with. On the bottom right side of the main screen, select the General tab. Click on the Amt Due Mo: button. That will bring you to this screen:



Click on Add/Remove Charges. You should now see:



Select "Rent Tax" and click on the right arrow ( ), click on OK then OK again, and you're all done. Repeat for all units you wish to apply Rent tax to.

Insurance Setup

This section explains how to setup and use the insurance module in Express.

The insurance module in Express works with the leading insurance providers in the self storage industry. If your facility uses an insurance broker that is not integrated with QuikStor Express, you will need to add Insurance as a monthly charge. Contact your QuikStor account representative for a current listing of integrated insurance companies.

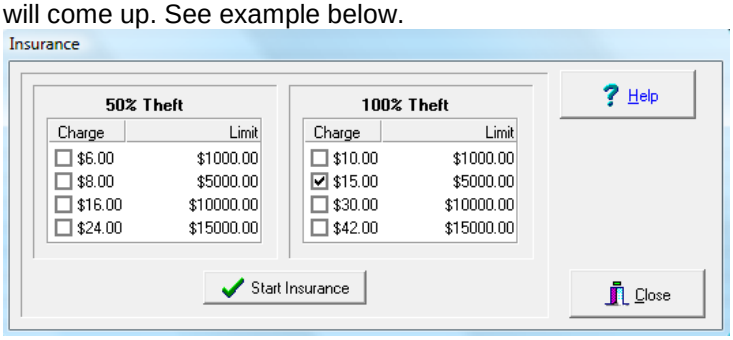
Once you have completed your account setup with your chosen insurance company, you need to set up Express to sell insurance to your tenants.

QuikStor Support or your account representative must activate the insurance module in Express before you can sell insurance. Once activated, please follow the instructions below to add insurance during a move-in or to existing tenants.

ADDING INSURANCE TO EXISTING TENANTS

Select the existing tenant's unit to activate insurance (note: the tenant must have a current status to activate insurance).

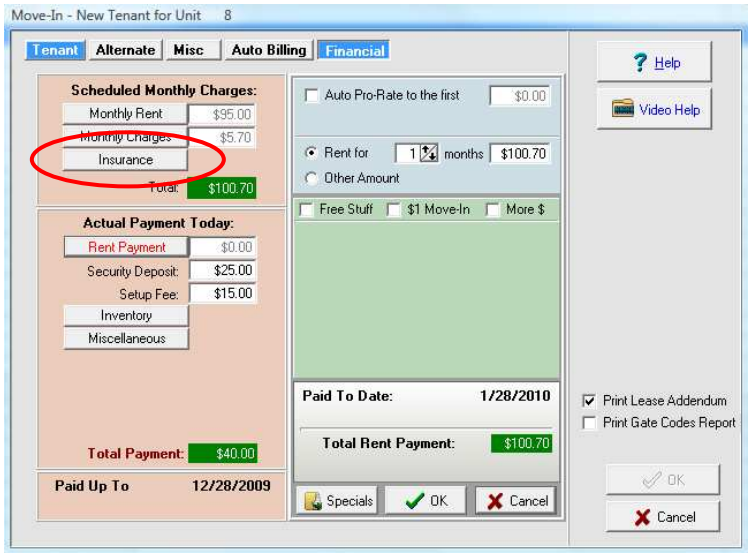
1. Select *Tools -> Insurance ->Start/Cancel Insurance*
2. Depending on which insurance company you have there will be a variety of insurance forms that will come up. See example below.



3. Enter the insurance value that the customer would like to purchase and click Start Insurance.

ADDING INSURANCE DURING A MOVE-IN

Go through the normal move-in process and when you get to the Financial tab, click on the Insurance button to open the form above. Enter the insurance value that the customer would like to purchase and click Start Insurance.



GENERATING A REPORT OF ALL INSURANCE PREMIUMS COLLECTED

Each month-end overnight processing prints out an insurance activity report listing total premium payments to your chosen insurance company. This report can also be printed manually by selecting *Reports -> Monthly Charges -> Insurance Activity Report*.

The *Reports -> Tenants -> Monthly Charges of All Tenants* report includes all tenants who have insurance.

INSURANCE IS ALWAYS PAID WITH RENT

Insurance is a monthly charge, and insurance premiums are listed accordingly in your collection records. If you give free rent to a tenant with insurance, they must still pay the insurance for that time period.

- If you give free rent during a move-in, Express will automatically add the insurance premium to the tenant's initial payment.

- If you enter a credit toward rent (Payment/Tenant Credit) to a tenant with insurance, then you should enter the full amount of rent plus all monthly charges (including insurance).

  Example: Each month, a tenant pays $30 rent + $3 rent tax + $6 insurance. If you want to give them credit for two months rent plus monthly charges, then enter
  ($30 + $3 + $6 = $39) x (2 months) = $78
  QuikStor will then require you to enter an insurance payment of $12.
  If you enter a debit against rent, everything works the same, but in reverse: for a two-month debit, enter
  ($30 + $3 + $6 = $39) x (2 months) = $78
  and QuikStor will refund the $12 insurance premium (as credit on account).

- If you move a tenant's paid-to-date (Payment/Change Paid To) and they have insurance, this is the equivalent of a credit toward rent or debit against rent, and all the same rules apply.

- If you start insurance for a tenant who is already paid up to a future date, QuikStor will require them to immediately pay for insurance for now through their paid-to-date.

- You cannot start insurance for a delinquent tenant. They must first pay their rent, then they can start insurance.

CANCELING INSURANCE

Select a tenant from your list, and then go to Tools -> Insurance -> Start/Cancel Insurance

You will now be at a window that will ask you if you are sure that you want to cancel this tenant's insurance manually. If so, click the **Yes** button. If they have prepaid for the insurance it will ask if you want to refund the policy amount. Click on the **Yes** button. This will automatically cancel the tenant's insurance policy in your system and bring up a form to print out for the refund.

PRINTING PRE & CANCEL INSURANCE NOTIFICATIONS

Select a tenant from your list, and then go to Tools -> Insurance -> Send Pre-Cancel Letter

This will send a letter to the selected tenant notifying them of your intent to cancel their insurance coverage. You will also be able to print an actual cancellation letter once you have officially cancelled their insurance.

You can also go to Tools -> Insurance -> Send All Pre- and Cancel Letters. This option will print all pending insurance letters.

Tenant Debit/Credit

This window will allow you to add a charge (debit) or refund money (credit) to a tenant's account, depending on which selection you make from the Payment menu located on the toolbar.

There are times when you must make a debit for additional money that a tenant owes. Or, you may need to give a credit, even though a payment has not actually been made. (This can happen when someone mails in a payment, which you don't receive until after a late charge has been posted.) In these, and other unusual situations (such as correcting an error that was previously made), this is the function you will use.

If you are uncertain whether you are performing a credit or a debit, simply look at the top of the window.

In QuikStor Express, like with many accounting programs, charges and refunds are applied to categories such as rent, security deposit, administrative fees, etc. When applying a credit or debit, you can choose from a variety of categories. Choose the most appropriate category or categories, and fill in the amount(s) in the field to the right of each category.

Finally, check the amounts and the total to make sure that they are correct, and then click the ✓OK button to confirm.

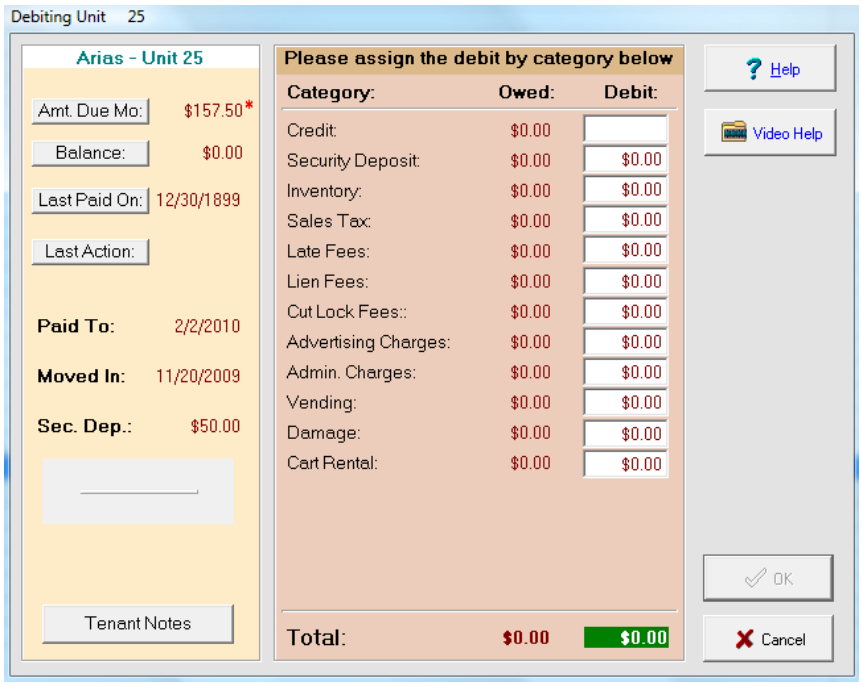
HOW TO APPLY CREDITS & DEBITS

Express has a wide range of ways you can apply a credit or debit to a customer's account. The basics are detailed below.

DEBIT

This is NOT how you want to add late fees, lien fees, advertising charges, etc. to a tenant's account! These charges have their own functions in *Delinquents -> Apply Cut Lock/Advertising/Late Charges* or *Delinquents -> Print Notice for Tenant.*

Select the tenant you wish to apply a debit to (this is taking FROM them), then select Payment -> Tenant Debit. You should see a screen that looks like this:

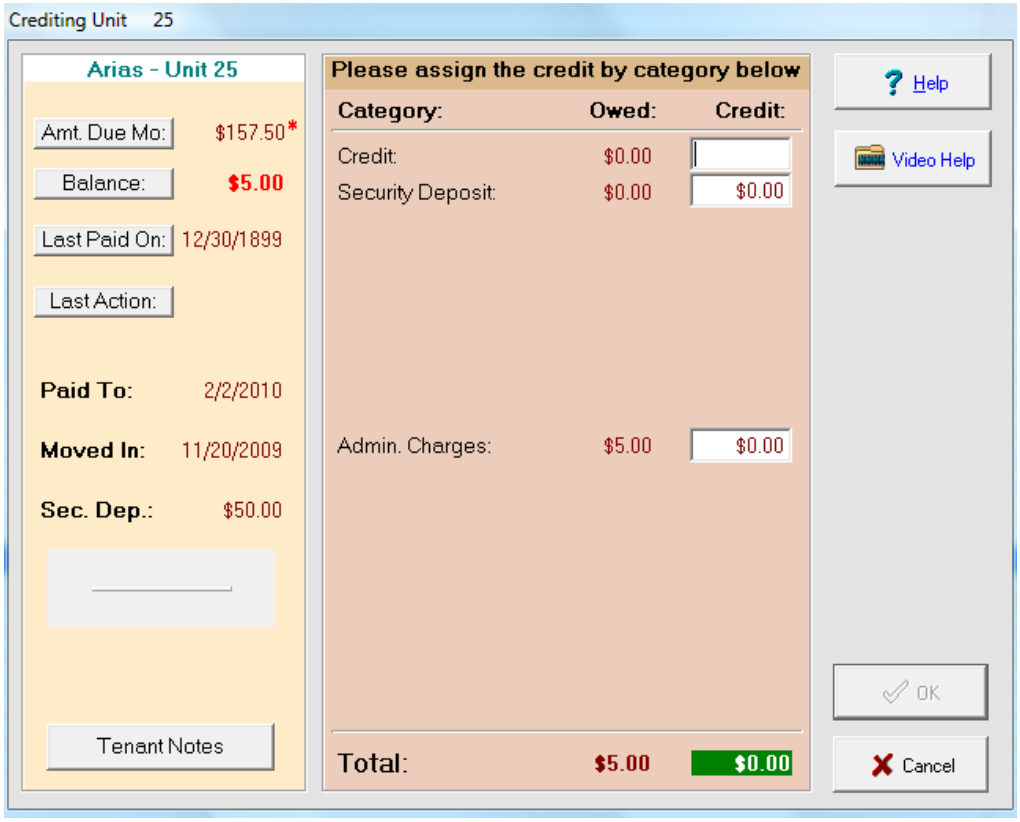


The categories allow you to keep track of where the funds should be allocated in reports. If you wish to charge them an administrative charge, for example, you would go to this line:

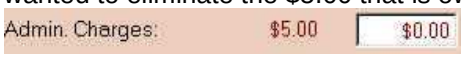
and enter the value you wish to debit in the white area. If there is a value to the left of the white area, that value is how much this tenant owes – if you enter a value in this white area, it will add your value to the value already there. Add debit charges in as many categories as necessary. Click on OK when you are finished. Express will require that you enter notes for this transaction. Enter whatever you feel is necessary. Including your name or initials is a good rule of thumb. Click OK, and the debit is complete.

CREDIT

Select the tenant you wish to apply a credit to (this is giving TO them) then select Payment ->Tenant Credit. You should get a screen similar to this:



Notice that there are fewer categories on this screen. You only have the option to post a credit to the Credit category, the Security Deposit category, or any category that has money owed. In the above example, there is $5.00 owed in Admin. Charges. The procedure for applying a credit is the same as in applying a debit. Go to the category you wish and enter the amount you wish to credit in that category. If, for example, you wanted to eliminate the $5.00 that is owed in Admin. Charges, you would go to the white area in here:



and enter 5.00. In the credit screen, the dollar amount you enter will be subtracted from the amount listed in the “Owed” column. Add credit charges in as many categories as necessary. Click on OK when you are finished. Express will require that you enter notes for this transaction. Enter whatever you feel is necessary. Including your name or initials is a good rule of thumb. Click on OK, and the credit is complete.

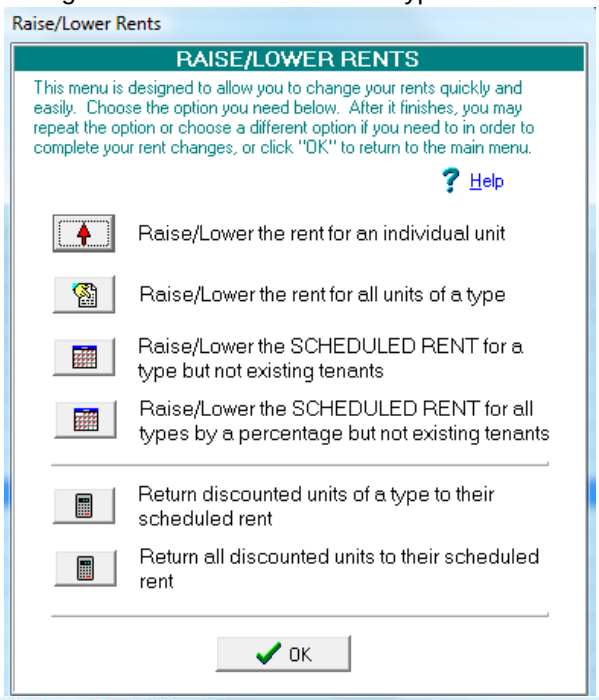
USING A CREDIT FOR PAYMENT

To use a credit for a payment, select what you wish to pay from the payment screen (One month, different payment, etc.), and then enter a checkbox in the yellow line that looks like this:

Express will automatically calculate the amount of credit to use, as well as remaining balance. Credit can ONLY be applied to the category of Rent. Any other categories you wish to pay for in the Payment screen will require another form of payment.

Raise/Lower Rents

This feature is located under the Tools menu on the toolbar. It is designed to allow you to change your rents quickly and easily. You may raise or lower the rent for individual units, all units of a specified type, or change the **scheduled** rate for a type without affecting the rent for currently occupied units.



You may use any number of these options in order to complete you rent changes, or click ✓**OK** to return to the main screen. Below are descriptions of each of the different options that you can choose.

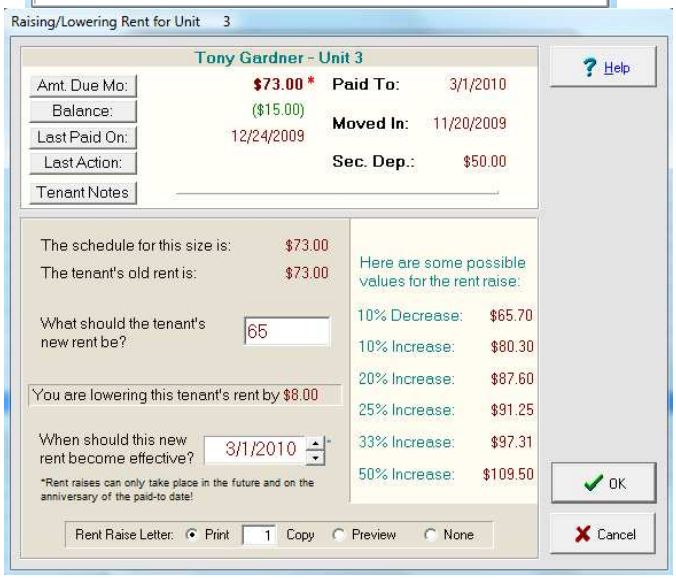
Rent raises that affect existing tenants will apply as follows:

CURRENT TENANTS

The new rental amount displays under "Amt Due Monthly" effective as soon as the rent raise is posted.

DELINQUENT TENANTS

After the rent raise is posted, the raise is posted to the tenant's rental rate history, however the current rent amount remains under Amount Due Monthly until the next subsequent payment which makes them current (as of the date the rent change is posted). The new rent then posts onto the account.



Tenant's rent raise histories can be viewed individually by selecting the unit, clicking Amt Due Monthly, and clicking Rental Rate History. A complete list of upcoming rent raises can be printed by selecting *Reports-> Tenant -> Those Getting a Rent Change (E-L-P)*.

NOTE: You also can raise or lower a rent upon a move- in. This information can be found in the Monthly Rent section under Move-In.

CHANGE RENT FOR AN ADDITIONAL UNIT

This function allows you to raise or lower the rent for a specific tenant.

Begin by making sure you have selected the correct unit, and that the information about that unit is correct.

Enter the new rent amount into the field next to "What should the tenant's new rent be?" You can use the suggested amounts on the lower right side of the window as a guide. When you have entered the new rent, press the tab key on your keyboard to set the new amount. Then choose a date when this new rent should become effective.
Note: *This date must be some time in the* ***future****, and it must be on the anniversary of the Paid-To-Date. So, if the date today is 12/09 and the Paid-To-Date is 01/10, you can make the rent change effective 02/10, or 02/10, or 03/10, etc.*

Finally, you can choose whether to print a Rent Raise Letter to inform your tenant of the raise in rent.

When you have made the changes and are certain all of the information is correct, click the ✓OK button to make the change.

CHANGE RENT FOR UNIT TYPE

This function allows you to change the rent for all units of a specified type. For example, you may wish to change the rent on all 10X10 outdoor units.

For vacant units this rent change takes place immediately. For occupied units you must specify when the rent change will take place. If you do not wish to change the rent for occupied units, exit this window by clicking on the **Close** button and choose "Raise/Lower the SCHEDULED RENT for a type but not existing tenants" from the Raise/Lower Rents menu.

Begin by making sure you have selected the correct unit type, and that the information about those units is correct.

Enter the new rent amount into the field next to "What should the new rent be?" You can use the suggested amounts on the lower right side of the window as a guide. When you have entered the new rent, press the tab key on your keyboard to set the new amount. Then choose a date when this new rent should become effective.

Note: *This date must be some time in the* ***future****, and it must be on the anniversary of the Paid-To-Date. So, if the date today is 12/09 and the Paid-To-Date is 01/10, you can make the rent change effective 02/10, or 02/10, or 03/10, etc.*

Finally, you can choose whether to print a raise letter to inform your tenant(s) of the raise in rent.

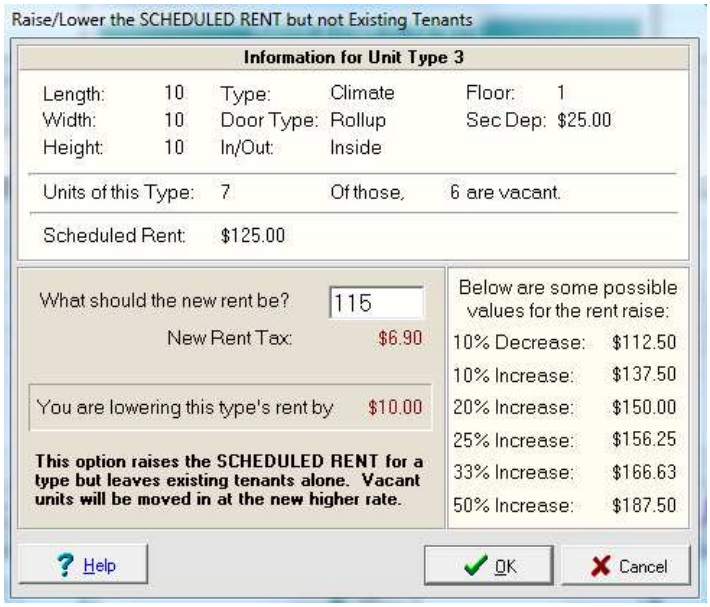
When you have made the changes and are certain all of the information is correct, click the ✓OK button to make the change.

CHANGE SCHEDULED RENT BY UNIT TYPE

This function raises or lowers the rent for a specific type of unit, but leaves the existing tenants at the same rate.

When a tenant moves out of the specified type of unit, and a new tenant moves in, the new tenant will be charged the raised/lowered amount.

Begin by making sure you have selected the correct unit type, and that the information about that type is correct.



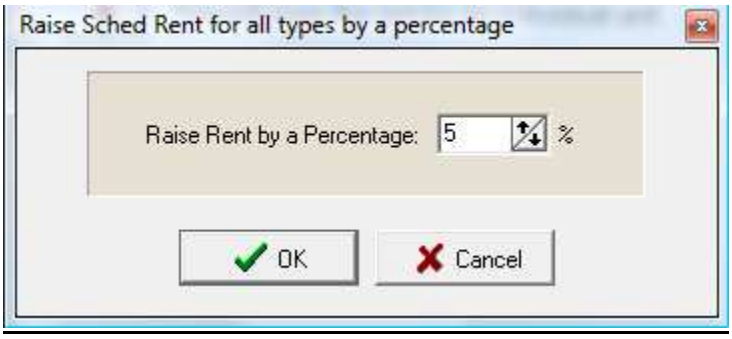
Enter a new rent into the field next to "What should the new rent be?" You can use the suggested amounts on the lower right side of the window as a guide. When you have entered the new rent, press the tab key on your keyboard to set the new amount.

When you have made the changes and are certain all of the information is correct, click the ✓OK button to make the change.

CHANGE SCHEDULED RENT BY PERCENTAGE

This function raises or lowers the rent by a given percentage, but leaves the existing tenants at the same rate.

Select  Raise/Lower the SCHEDULED RENT for all types by a percentage but not existing tenants and then enter in the percentage that you would like to raise or reduce the scheduled rent. For example, the screen below shows a 5% increase on all units, but does not affect existing tenants. Those occupied units will be automatically increased when the current tenant moves out.



RETURN SCHEDULED RENT

This function can be used to return discounted units of a specific type to their originally scheduled rent.

Begin by selecting this option from the Raise/Lower Rent menu. Select the type from the list given that you wish to return to its scheduled rent. Click on the ➚ **Select** button, to view all of the information on this unit.

You can also choose the "Return ALL discounted units to their scheduled rent" which does not require you to select a unit type first.

When you have made the changes and are certain all of the information is correct, click the ✓OK **button to make the change.**

RE-PRINT RENT RAISE LETTERS

This function allows you to automatically re-print all of the rent raise letters for a specified date range.

Go to Tenant -> Re-print Rent Raise Letters

Once selected you can enter the desired date range that you want the rent raise letters to print. Then click on the ✓OK button, and it will automatically print all of the rent raise letters for that date range.

NOTES

This window allows you to put in specific notes about tenants.

To get to this function, select a unit from your list, and then go to Tenant -> Notes or click on the Tenant Notes icon in the top right corner of the tenant information window on the main screen.

The Notes section allows you to enter in notes that do not have a specified field elsewhere in Express. You might want to remember a certain telephone conversation, or an unusual situation that occurred with a particular tenant.

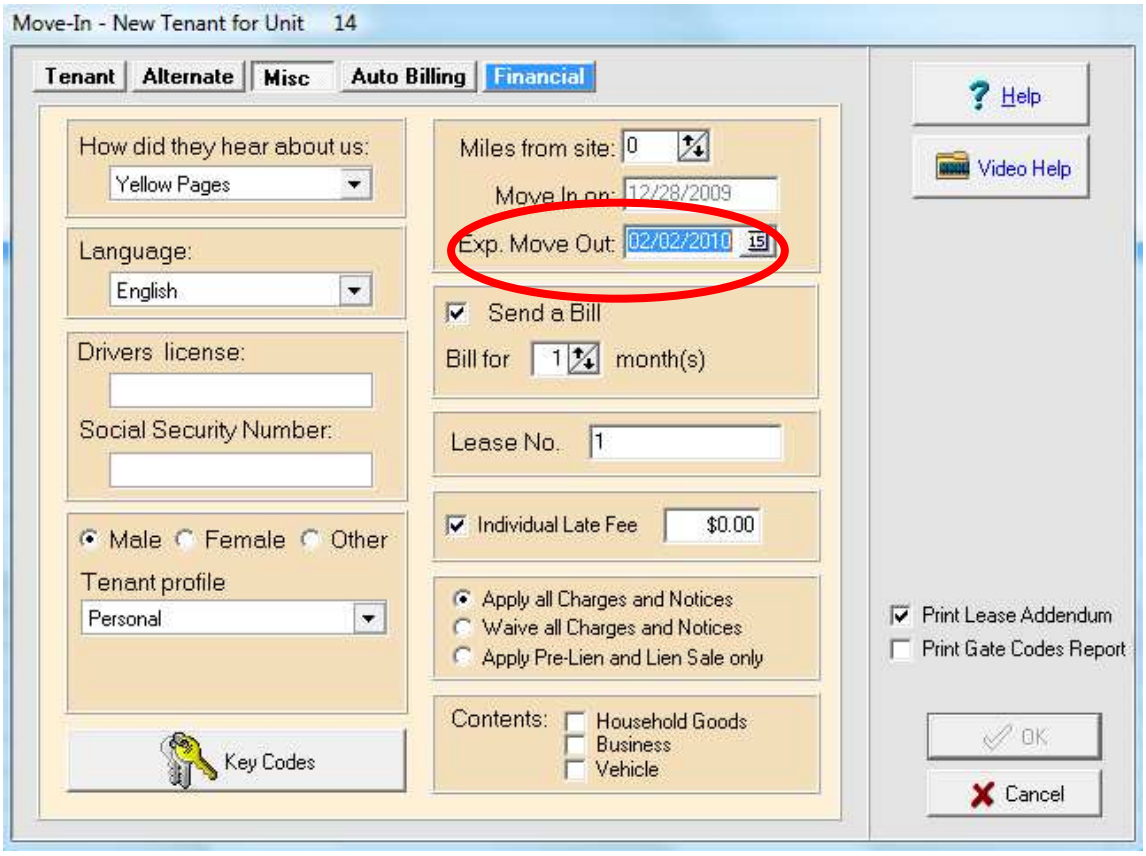
Use this option to write tenant notes that don't need to be put in the Special Notes. (Special Notes are made visible on the main screen of Express at all times). For example, you may need to indicate that notices need to be sent to a certain tenant one week before rent is due. When you open this window it will show you all of the existing notes that you have written about the tenant. To write a new note, start typing in the box provided, then click the ✓**Append** button to save. If you do not wish to add any notes at that time, or if you've made a mistake, click the ✗**Cancel** button.

EXPECTED MOVE-OUTS

Expected move-outs can easily be entered into a tenant's record within QuikStor Express. Below is an explanation of different ways to do this and the reports that reflect this information.

DURING MOVE IN

During the move-in process of QuikStor Express you can enter in the date for an expected move out by going to the Miscellaneous Tab of the Move-In form and in the upper right hand corner (as shown below) you will see the field where you can enter in the date. You can either enter this date in manually or use the drop down calendar to select the specific day you wish to input.



EXISTING TENANT

To set an expected move-out date for an existing tenant, select the tenant you want to work with and then go to the Tenant Menu and select Change Info. Select the Miscellaneous tab from the window and you will see a similar screen to the one shown above. Enter the date the same way – either manually inputting the date or using the drop down calendar. Once you have finished, click on the OK button to save the changes.

REPORT

There is a report you can use to check if tenants have been scheduled for an Expected Move-Out or not. This reported is explained below.

Expected Move-Outs Report (E-F-G)—This Report can be found by going to Reports -> Vacancy/Occupancy and selecting the Expected Move-Outs Report. This report lists current tenants who have given notice that they are vacating. Information includes date of Move-Out, unit, name, Paid-To-Date, size, balance, and security deposit.

Move-Out

This form will allow you to vacate a unit when a tenant moves out. You can also make any collections/refunds necessary to close the tenant's account.

To get to this window, select a tenant from your list, go to the Move-In/Out menu on the toolbar, and select Move-Out.

On the first screen, check the details to make sure this is the correct tenant to move out, and then click the ➔ **Next** button.

Fill in the details required, including the reason for moving, and the refunds or collections required for this Move-Out. There is a running total near the bottom of the window. Once all data has been entered, click the ➔ **Move-Out** button.

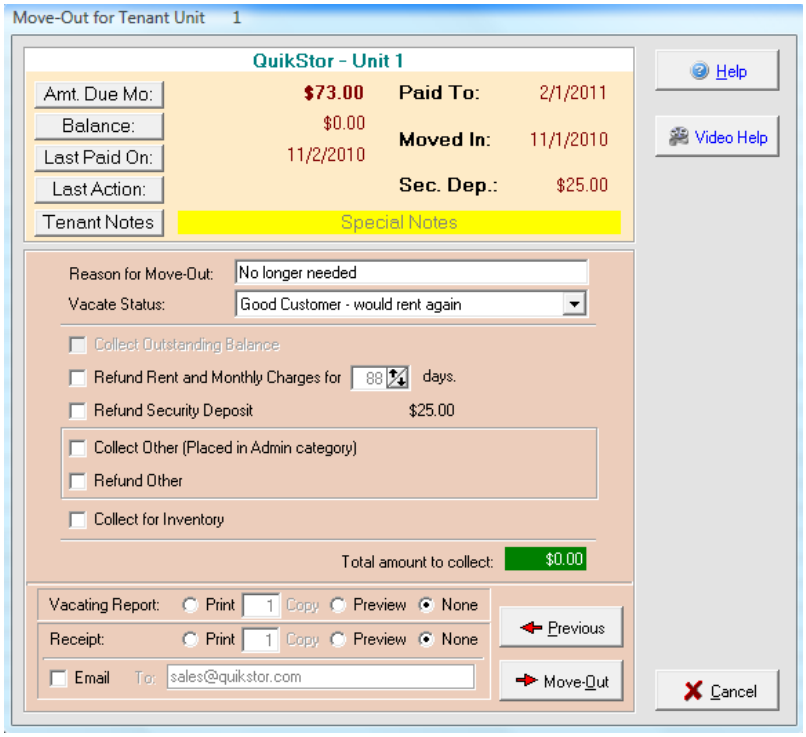
*A dialogue box will open asking you to confirm any collection/refund. Confirm this amount by clicking **Yes**.*

HOW TO PRO RATE A MOVE-OUT

In certain cases at your site, you may need to Pro Rate or charge a different amount when a tenant vacates a unit.

On the main toolbar, go to Move-In/Out -> Move-Out.

The first screen that comes up gives you a snapshot of the financials and personal information for this unit/tenant. Click Next and you will see a screen that looks like this:



Here you can collect any outstanding balance and refund rent or Monthly Charges for a certain amount of days. Confirm that the Collect Outstanding balance box is checked. The amount should be the amount of days from today's date, up until your next paid to date. Note that if there is a refund to be given this option will be grayed out as in the example given

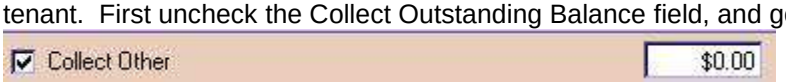
.

If you want to Pro Rate or charge the vacating tenant a different amount than the full outstanding balance, you would use one of the two methods given below:

1. The first method allows you to simply enter in the number of days that you want to refund the vacating tenant by entering a check mark here::

Then scroll through and set the number of days you would like to take off of the Outstanding Balance for the tenant to pay. For example, if a tenant's paid to date is the first, and he comes in on the first to move out, and you want to charge him for 15 days, you would simply follow the directions above, and where you put in the amount of days, you would put 15, and then it would automatically generate the total for you.

2. The second way is if you have a completely different amount that you need to charge the vacating tenant. First uncheck the Collect Outstanding Balance field, and go to this area:



Put a check mark in the box, and then type in the amount that you wish the tenant to pay upon Move out.

Once you are finished with this click on the Move-Out button and finish the Move-Out as normal.

TRANSFERRING A CREDIT TO A LINKED UNIT DURING A MOVE-OUT?

Follow the steps below to transfer the credit to the remaining unit:

1. Move out the tenant as normal by selecting the tenant you wish to move out, and going to Move-In/Out -> Move-Out. Go through the normal move-out procedure. During the Move-out you will need to refund the tenant's outstanding credit(s). Make sure to print out an extra receipt during this process so that you know (and have evidence) of how much credit this tenant had.

2. Perform a tenant credit (Tenant -> Tenant Credit) on the unit(s) that the vacated unit was linked to for the refunded amount shown on the printed receipt. Enter this into the Credit field, and then enter in tenant notes clearly describing the unit number this credit was from and why this credit was given.

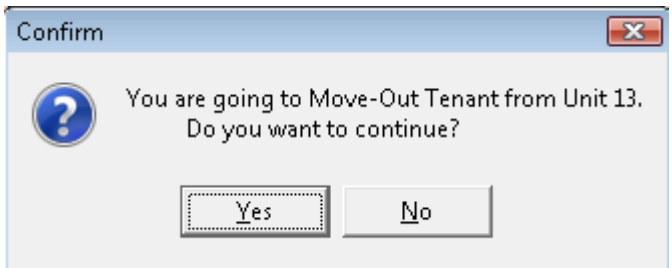
3. Check the tenant's balance & transaction history to make sure the correct amount was entered. Be sure to keep the vacated tenant receipt showing the credit for your records.

MOVING OUT A TENANT WITH AN OWED BALANCE

There may be times that you need to move-out a delinquent tenant with a balance owed, for that tenant to pay at a later time. This section will explain how to do this.

Select the delinquent tenant from your list, then go to the Move-In/Out menu on the top toolbar and select Move-Out. Confirm all of the information is correct on the first window that appears, and then click Next. On the next window, you will see a section that says "Collect Outstanding Balance" which has the full amount that the tenant owes checked by default. Uncheck that box, and Express will not collect the balance owed.

Once this is unchecked, make sure that there is nothing else checked (unless other refunds or collections are involved with this move-out), click on the Next Button, and a window similar to this will appear:



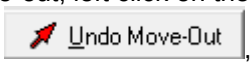
If this is correct, click on the Yes button to finish the Move-Out, and a receipt and vacating tenant report will print out for you. On the receipt and vacating tenant report, a full statement including the balance owed is shown.

After they are all moved out, when they come back in to the office to make a payment towards their balance, you will use the "Former Tenant Payment" option within Express.

UNDO MOVE-OUT

This function will return a former tenant unit to their vacated unit

Go to Move-In/out -> Undo Move-Out. The Undo Move-out option moves a previously vacated tenant back into their unit. It can be used if you accidentally move out the wrong tenant, or if the tenant changes his mind during the move out process.

To undo the move-out, left click on the unit you wish to undo, (scrolling up and down as needed). Highlight the unit and click 

, then choose Yes to confirm.

You can sort by any of the columns by left clicking on the title for that column, or you can search for a certain former tenant, by entering their last name or unit number in the search field.

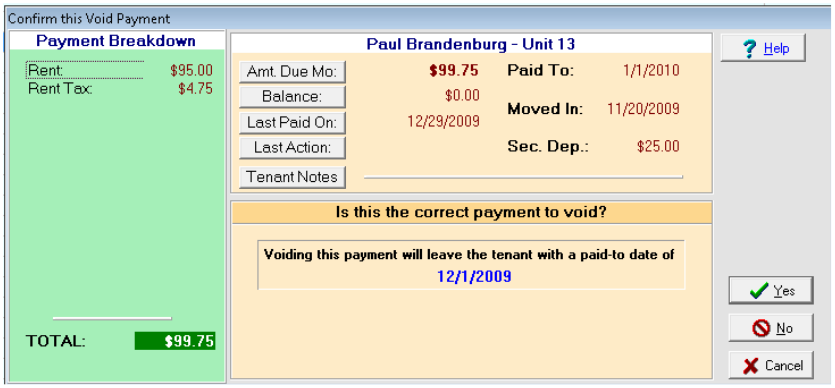
NOTE: You can only move a tenant back in if their previous unit is vacant.

Void a Payment

This function allows you tto void a payment made today

Select a tenant from your list, and then go to Payment -> Void A Payment.

First check all of the information in the window and make sure it is correct, and that this is the payment you wish to void.



Note: *You may only void payments on the same day they were entered.*

Once you have made sure everything is correct, click ✓Yes to confirm the void.

HOW TO VOID A PAYMENT NOT MADE TODAY

To maintain database integrity, Express only allows you to void a payment that happened on the same day as the payment. To work around this, follow these steps:

1. Select the unit you wish to work with
2. On the main screen, in the General tab, click on Last Paid (Last Paid:)
3. Select the payment you wish to void, and click on Re-print Receipt (Re-Print Receipt)
4. With the receipt in hand, you are now ready to undo the payment.
    a. Select Change Paid-To-Date, and move the tenant's Paid-To Date to what it was prior to the payment
    b. Select Debit, and debit the tenant any dollar amount that they paid in any field other than Rent And Charges. Those are taken care of in the step above
    c. If there was a credit applied to the original payment, select Credit and re-apply that credit to the tenant's account

Change Payment Method

This function allows you to change the payment method for a single transaction.

Go to the Payment -> Change Payment Method.

Sometimes an incorrect payment method was selected, or the tenant changes his mind after you have already entered a different type of payment method. In such a case, you can change this method of payment instead of having to void the payment and start over.

In this window you select the payment that you wish to change, and click ➚ **Select.** The next screen is the normal payment window**.** This screen allows you to choose the correct payment method for this transaction.

A manager's note is automatically added into Tenant Notes when a payment method change takes place to assist with the auditing process.

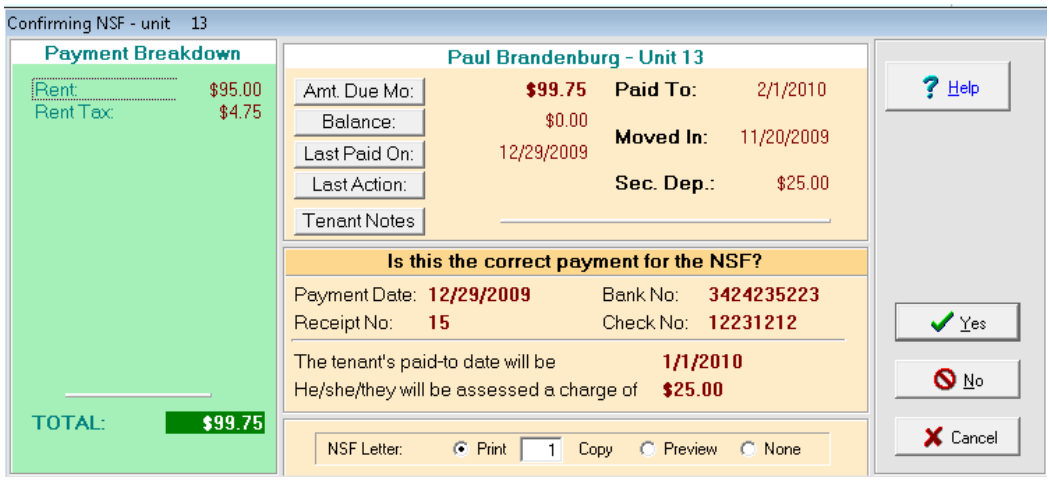
Once you have made sure everything is correct, click ✓OK, to confirm the payment change.

NSF (Non Sufficient Funds) Check

In this section you can confirm the details of the bounced check and decide whether to print out an NSF letter.

Select a tenant from your list, and then go to Payment -> NSF Check.

Look over this information carefully. Make sure that you have selected the correct customer, as well as the correct payment. Then decide if you would like to print an NSF letter, and if so, how many copies.



Important Note for STRICT FIRST OF THE MONTH Facilities only: *Even if you have selected "Strict First of the Month Facility" under Site Setup, the tenant's Paid-To-Date will be moved to their move-In date. This means they will most likely have a Paid-To-Date that is* ***not*** *the 1st. However, the next time this customer makes a payment, it will move their Paid-To-Date to the first of the next month, and they may end up with a credit balance. (Example: A customer moves in on 03/10. Their check bounces. When you mark the check as NSF in Express their Paid-To-Date will be 03/10, and the balance will be equal to a full months rent, plus any other charges such as security deposit, administration fees, and NSF charges. When the balance is paid, the Paid-To-Date will move to 04/10, and there will be credit equal to 6 days payment.)*

When you have confirmed that the information is correct, click the ✓Yes button to confirm.

WHY DOES THE NSF RECEIPT SHOW LESS THAN TENANT WAS CHARGED?

The NSF process in Express is based on the concept that Time is Money. In the storage business, this is meant literally. Time is a commodity that has a dollar value per month or per day, and if taken properly into account, you will see that the amount listed as due on the NSF receipt is correct.

For example, let's say NSF Jones moved into a unit on March 12. The unit's rent is $30 per month, but they moved in with a prorate, so their initial rent payment is $49, and their initial Paid-To-Date (PTD) is May 1. The setup fee was $5 and the security deposit was $15. He paid using a check. Here is the receipt NSF Jones received that day:

Before this payment, your rent was due on Tuesday, March 12, 2002.

DETAIL ON YOUR PAYMENT

Rent	49.00	
Admin. Fees	5.00	
Security Deposit	15.00	
Total Payment		**69.00**

Payment made by CHECK #64326423 drawn on Bank #62.

Your next rent is due on Wednesday, May 1, 2002. A late charge of $10.00 is imposed if you are 10 days late.

Later, the bank discovered that the check bounced. You issue an NSF Jones and the receipt prints out looking like this:

This is a very important letter, so please read it carefully! The last check we received from you, #64326423, for $69.00, has been returned to us. We have subtracted this amount from your account, and you are now paid up to March 12, 2002. The most critical and IMPORTANT thing is that this must be cleared up IMMEDIATELY.
Our records show that you have an outstanding balance as follows:

Rent	30.00	
Admin. Fees	5.00	
Balance		**$35.00**

At first glance, it seems that all you are asking the tenant to do is pay $35, when he originally paid $69. Some might say this looks as if the site is losing money. But if you will notice, Jones PTD is now back to March 12. If you delve further into his account, you will see that his Security Deposit is now zero. If he pays only the outstanding balance (which you would process with "Outstanding Balance" in the Payment screen, rather than "Make a Different payment"), which at this point is really all he owes, his receipt will look like this:

Before this payment, your rent was due on Tuesday, March 12, 2002.

DETAIL ON YOUR PAYMENT

Rent	30.00	
Admin. Fees	5.00	
Total Payment		**35.00**

This payment was made in CASH.

Your next rent is due on Friday, April 12, 2002. A late charge of $10.00 is imposed if you are 10 days late.

Notice that the new PTD is now April 12, and the security deposit is still zero. If this tenant wanted to move their PTD to May 1, as it was when they first moved in, they would have to pay the difference for those 19 days, or $19. Also, to fill the Security Deposit again, they will need to pay the fee of $15. $19 + $15 = $34, which is the difference between what they originally paid and what they are paying now.

If, however, Jones were to pay the full amount he originally paid (and correctly distributed in "Make a Different Payment"), the new receipt would look like this:

Before this payment, your rent was due on Tuesday, March 12, 2002.

DETAIL ON YOUR PAYMENT

Rent	49.00	
Admin. Fees	5.00	
Security Deposit	15.00	
Total Payment		**69.00**

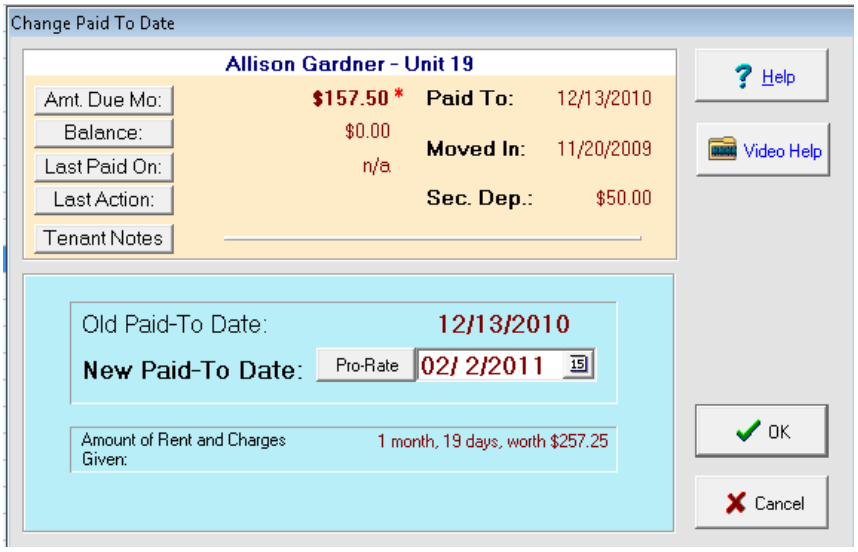
This payment was made in CASH.

Your next rent is due on Wednesday, May 1, 2002. A late charge of $10.00 is imposed if you are 10 days late.

Notice that the PTD is as it was, and all the fees are correctly distributed.

If your site charges an NSF fee, it basically gets added on with all the rest of the math being exactly the same.

Change Paid-To



This function allows you to change a tenant's Paid-To-Date. This is generally only used to correct a mistake that was made

Select a tenant from your list, and then go to Payment -> Change Paid-To.

Choose a new Paid-To-Date by clicking on the day, month, or year and entering a new number.

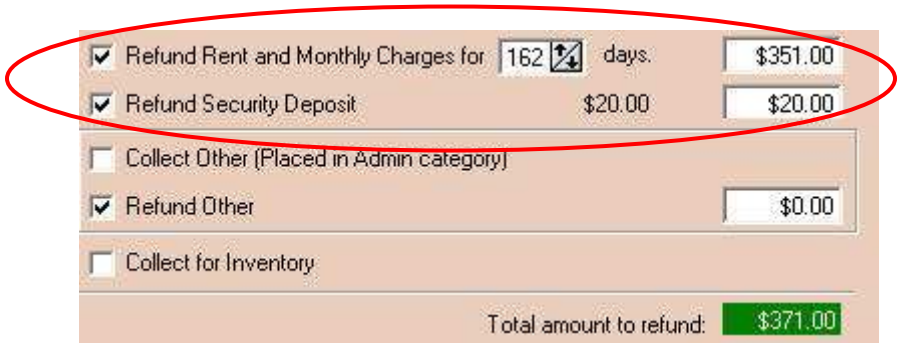
Alternately, you can click on the calendar icon to the right of the date to see a calendar. You can select a new Paid-To-Date by either selecting a date in the current month, or by using the arrows at the top of the calendar to change the month until you are able to select the date you desire.

Note: *If your facility is set as a Strict First of the Month Site, you will only be able to choose the first of any given month as the Paid-To-Date.*

When you have selected a new Paid-To-Date, look over the information carefully and click the ✓OK button to confirm. *This will take you to a window that will ask you to enter a reason for changing the Paid-To-Date. Enter a reason (this is **required**) and once again click ✓**OK** to confirm.*

Refunds

Refunds within QuikStor Express are usually given during a Move Out. To refund from Express, first perform a Move-Out for a tenant by selecting the tenant, going to the Move-In/Out menu, and selecting Move-Out. From this screen click Next, and then you will get a window that has a section on it similar to this.



From this screen (as noted above) check how much you want to refund this tenant that is moving out, and then complete the remainder of the Move-Out.

The only other time that Express will allow you to give a refund is if a tenant that is paid ahead and has purchased insurance decides to cancel his insurance. At that point, Express will ask if you want to refund the advance payment.

Now that you have made a refund, you are probably wondering what reports will show it.

Most of the reports in Express only show Collections (money taken in from renting units, inventory or miscellaneous charges). This is why a Bank Deposit and a Daily Collection Report do not show when refunds are made – both of these reports are for Collections only.

The report that shows refunds is the "Report On All The Refunds (R-E-F)" which can be found by going to Reports -> Exceptions -> Report On All The Refunds or by searching for R-E-F in the Report Selector module. You will be able to enter a date range for this report, so you can see all of the refunds that were made for a given date range.

Change Info

This function is used to modify tenant information that may have changed since Move-In, such as address, phone number, key codes, etc.

Select a tenant from your list, and then go to Tenant -> Change Info.

This is the same form that you used during a move-in, so follow the same procedures you used at that time. Update the information desired and click OK when done.

Insurance

INSURANCE: SEND PRE-CANCEL LETTER

This function prints a Pre-Cancel Letter for a selected tenant.

Select a tenant from your list, and go to Tools -> Insurance -> Send Pre-Cancel Letter

This will automatically print a Pre-Cancel Letter to send to your tenant. It will also print a copy for your records.

Express will alert you if there is no insurance for this tenant or if it is too early for you to cancel their insurance.

INSURANCE: SEND ALL PRE- AND CANCEL LETTERS

This function prints all Pre-Cancel and Cancellation Letters for all of your tenants with insurance.

Go to Tools -> Insurance -> Send All Pre- and Cancel Letters

Print Bill For Tenant

This function will automatically print the upcoming bill for the selected tenant.

Select a tenant from your list, and then go to Tenant -> Print Bill for Tenant.

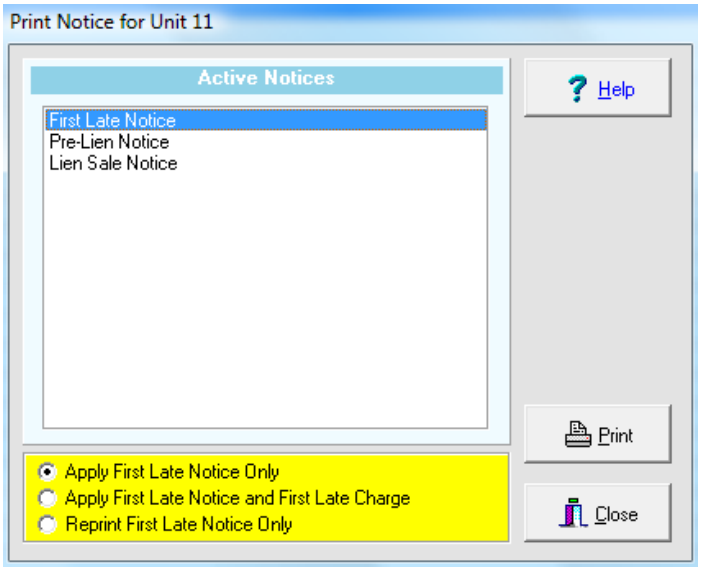
The bills are typically printed during overnight processing. If they did not print or if you need a specific bill printed out, you can use this function. This allows you to print the upcoming bill for a specific tenant. This action is done automatically once you make the selection.

Remember, bills do not print automatically for tenants who are delinquent. By that point, the tenant should be receiving notices, not bills.

Print Notice For Tenant

This function will automatically print a notice for the selected tenant.

Select a tenant from your list by going to Delinquents -> Print Notice for Tenant. You will see a window like this:



Select which Notice that you would like to print. Then select the option that fits your situation the best in the yellow box at the bottom of this window. Then click on the Print button to print the notice or the Close button to cancel without printing.

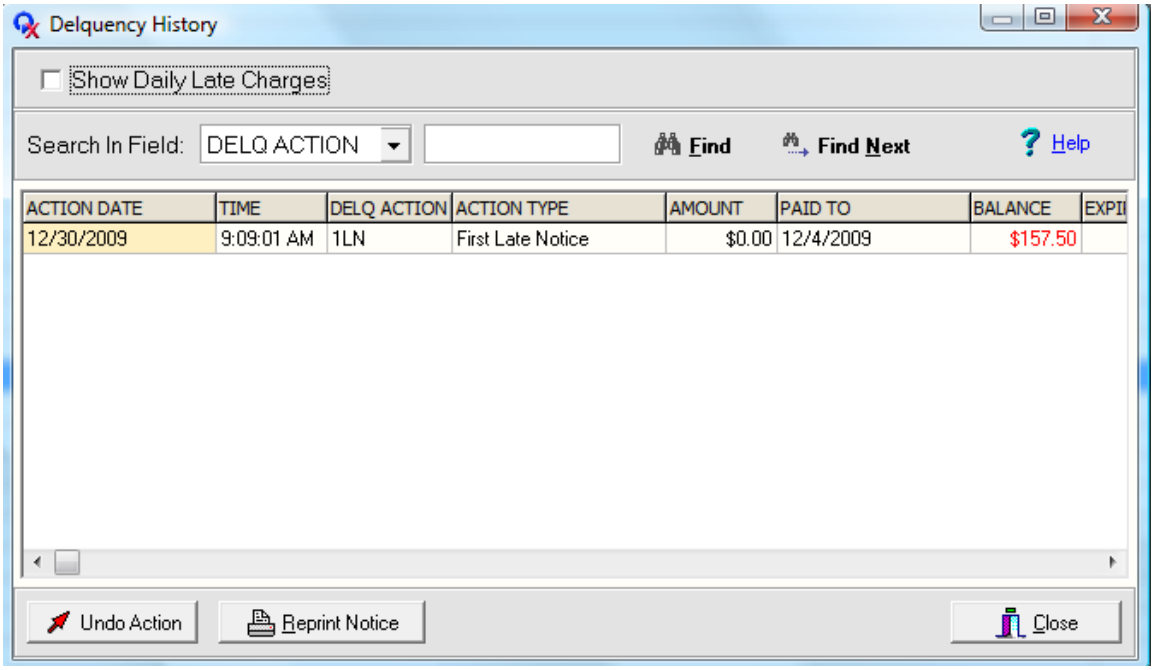
This is also the screen you would use to re-print a notice for a tenant. As long as you are not applying any charges and are just re-printing the notice this procedure will not leave a record in the Last Action field of tenant.

Note: *It will only allow you to print a notice if the selected tenant is delinquent.*

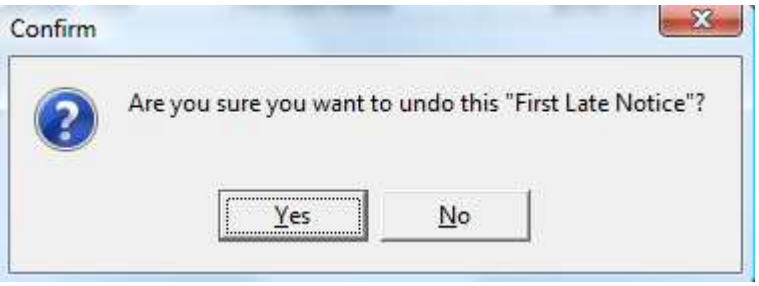
Undo Delinquency Action

This function allows you to undo a delinquency action (such as late notices, charges, etc) for a selected tenant.

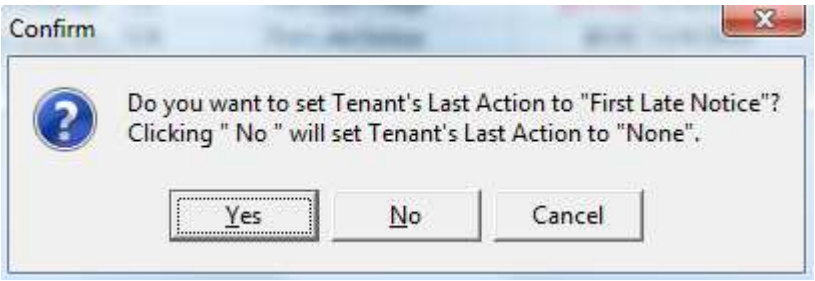
To use this function select a tenant from your list, then on the right hand side of the main screen you will see a button that looks like this (Last Action:). Click on this button and you will see a window similar to this:



Select which delinquent action you would like to remove, and then click on the “Undo Action” button. A verification box will pop up similar to this.



Clicking the No button will take you back to the previous screen, clicking Yes will bring a new verification box up similar to this.

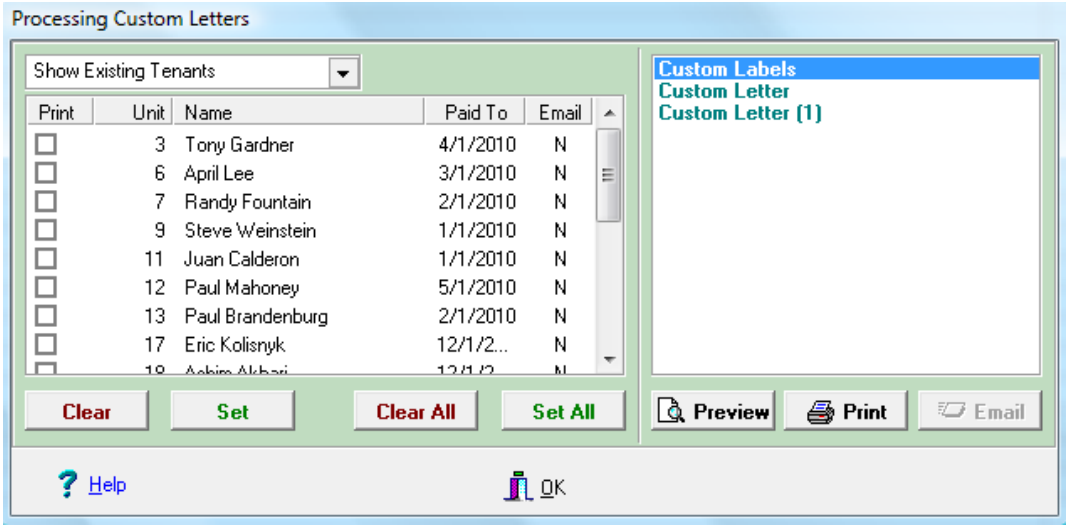


Click Yes to leave the Last Action the same as it was, click No to set it to None, or you can click on the Cancel button to quit this without undoing the action.

Print Custom Labels

This function will allow you to print mailing labels for all of you tenants.

To use this function go to Tenant -> Print Custom Letters \ Labels.

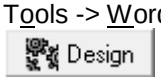


The default label form that this function uses is Avery 5160 Laser Labels. When you decide to print this mailing list, don't forget to make sure that the label forms have been inserted correctly into the printer before you confirm to print.

If you wish to make any type of changes to the label sheet, or change the size, go to Tools -> Word Processing -> Custom Labels. Then click the Design button.

Custom Letter

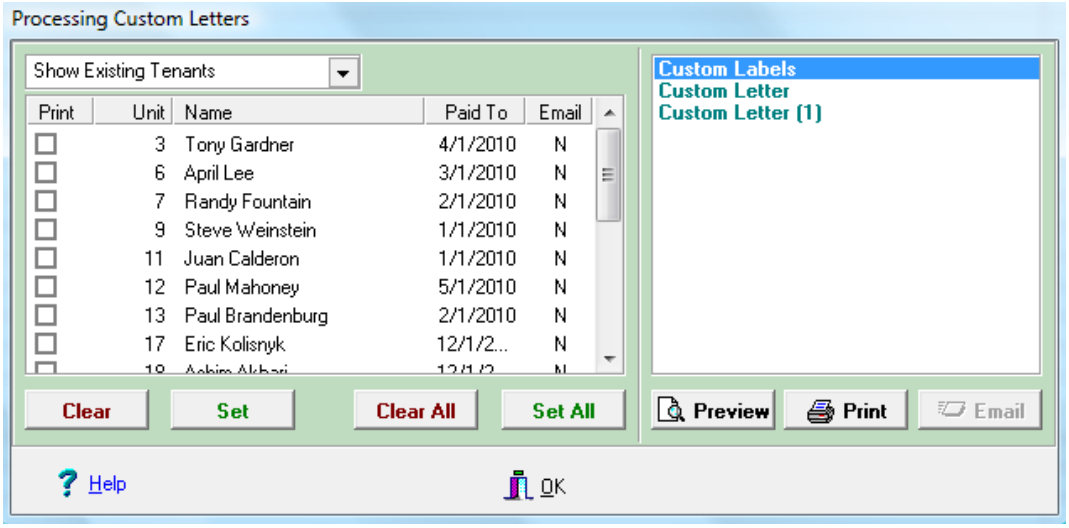
This function allows you to create customized letters to be able to send out to either a single tenant, selected tenants, or all tenants.

Start by creating your custom letters. To do this, go to Tools -> Word Processing. Select the Custom Letter template you wish to create/edit, and then click on the 

button.

Once you have created and saved your custom letter, you will then need to print it out.

To do this, go to Tenant -> Print Custom Letters \ Labels. This will bring up a window like this:



Select the custom letter that you wish to work with on the right hand side, then you can either select specific tenants on the left by checking the Print boxes next to the tenant names, or if you wish to send this letter out to all of your tenants, click on the Set All button. Then you can either click on the Print button to print these letters, or the Preview button to have a preview of the letter come up on screen.

***NOTE**: If you have more than one tenant selected and you click on Preview it will give you a preview of each of the tenants letters selected.*

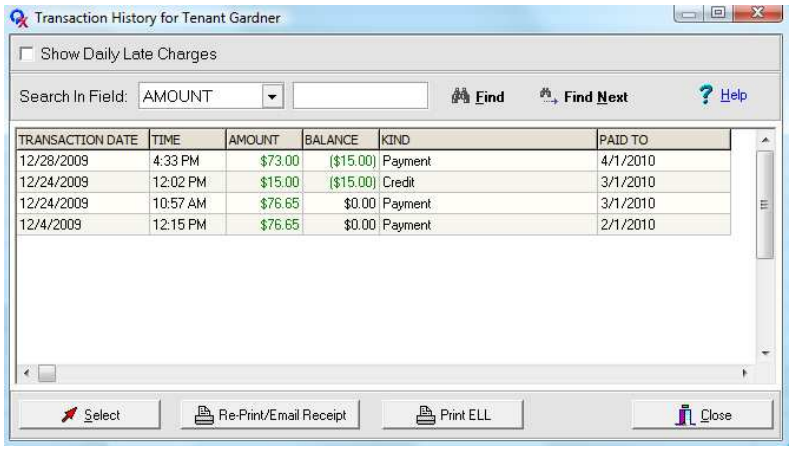
Tenant Transaction History

This window provides you a complete history of all tenant transactions. You can also "zoom in" on an individual transaction for additional detail.

Select a unit from your list, and then go to Tenant -> Transaction History.

This window gives a complete transaction history for a **tenant**, including all payments, credits, debits, etc.

To see more detail on an individual transaction, double click on it or highlight the and click the ↗ **Select** button.



You can also reprint or email receipts for payments by clicking the **Re-print/Email Receipt** button. This button will not appear unless the transaction is a payment (or another transaction which produced a receipt).

Click the "Print ELL" button to print a Transaction Report for the selected tenant.

TENANT PAYMENT HISTORY

This window allows you to view all of the payments that a tenant has made.

Select a unit from your list, and then go to Tenant -> Payment History.

This will show you all of the payments made by the selected tenant. You can highlight a specific payment to view details. From this screen you can also preview, print, or email receipts.

To exit, click on the Close **button**.

TENANT DELINQUENT HISTORY

This window allows you to view a tenant's delinquency history.

Select a unit from your list, and then go to Tenant -> Delinquency History or from the main screen click on this button: Last Action:

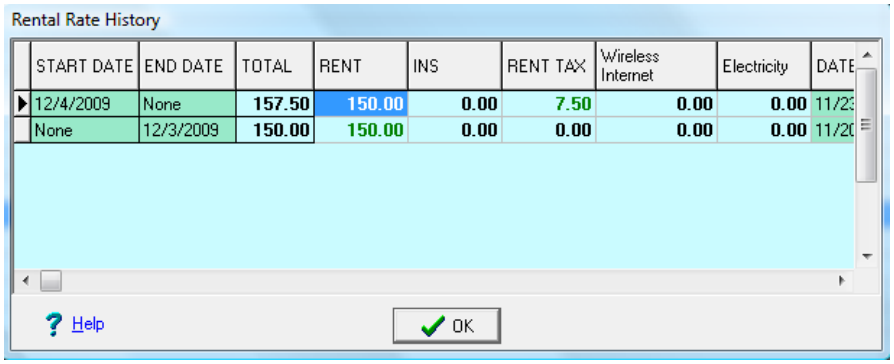
This will show you a list of delinquency actions and/or notices for this tenant. It will show their Paid-To-Dates, the date of the action, and what type of action was taken.

To exit, click on the Close **button**.

TENANT RENT HISTORY

This window allows you to view the rent history of a selected tenant.

Select a tenant from your list, and then go to Tenant -> Rent History.



This window shows you how much rent the tenant is paying, and if there are any extra charges in addition to their rent, such as insurance. It notes the amount of rent they pay, the amount paid for insurance (if applicable), any miscellaneous charges, and the date the rent was entered into the system.

When you are finished viewing this window, click the ✓OK **button.**

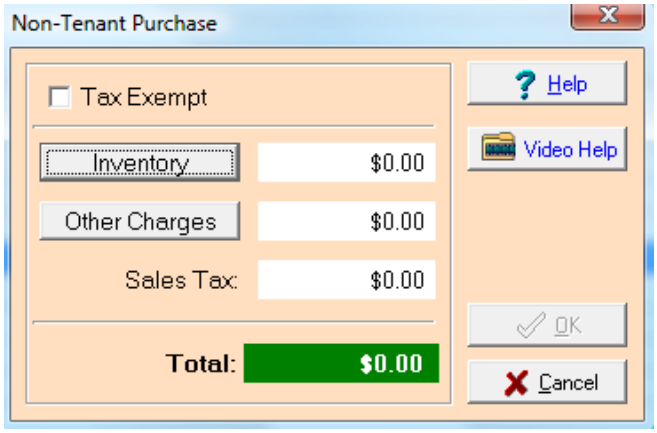
Non-Tenant Purchase

This function allows you to sell products out of your inventory to non-tenants.

Go to Payment -> Non-Tenant Purchase

This will allow you to sell items directly out of your inventory. It will also enter sales tax on these items if you specified an amount in your Site Setup.

Inventory button: Start by selecting the item you wish to sell from your inventory and click the ➔ **Next** button. Then type in the amount of items to sell and click the ➔ **Add** button. Repeat this process for all of the items you wish to sell. When you have added all of the items, click on the **Close** button.



This will take you back to the main window where you will have the option of adding other charges to the sale. If you would like to add charges that are not for inventory items, click the **Other Charges** button. When you are finished adding the additional charges, click the ✓**OK** button.

This will take you to the normal payment method window asking you what form of payment will be used. Select Cash, Check, or Credit Card and fill in the necessary information. When you are finished click the ✓**OK** button. This will print out a receipt for the customer and will also bring one up on your screen. If you make any mistakes or wish to go back to the previous screen, youmay click on the ✗**Cancel** button.

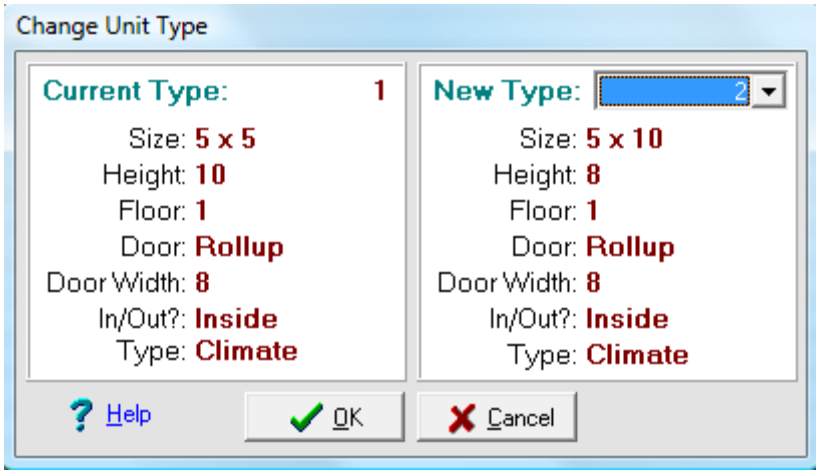
FACILITY

This section addresses functions pertaining to the site itself

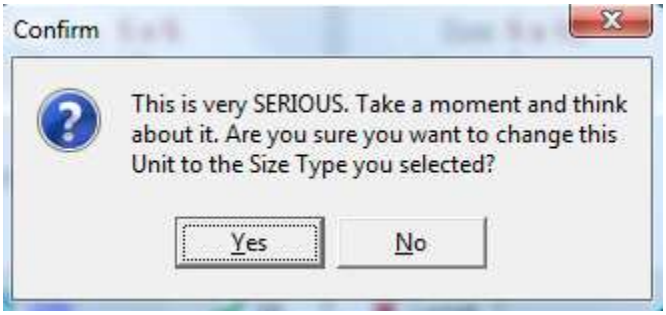
Change Selected Units Type

This function allows you to change the unit type of a selected unit. If you find that there is a unit listed as the incorrect size in Express, or it was accidentally created as the wrong Unit Type, Express has a quick and easy way to correct the situation.

Select the unit in question, and then go to File -> Units -> Change Selected Unit Type. You will see a screen that looks like this:



On the left, you will see the unit's type number (1 in this case), and the unit's current type. On the right, you will see the type you are changing this unit to. Select a new unit type number from the pull-down menu next to New Type: and click on OK. Express will issue you a warning:



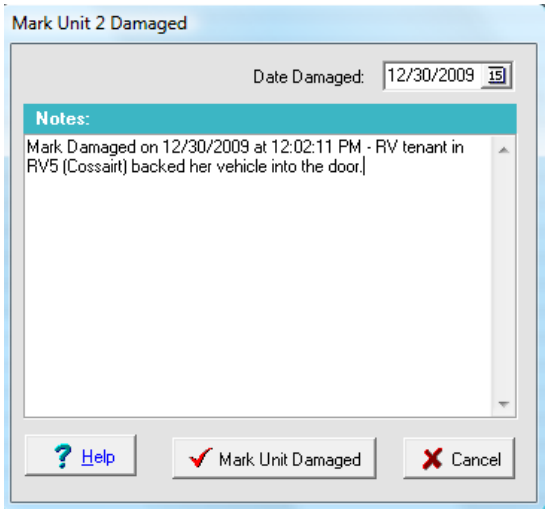
If you are unsure, the answer is No. If you are 100% positive, then finalize the process by clicking Yes.

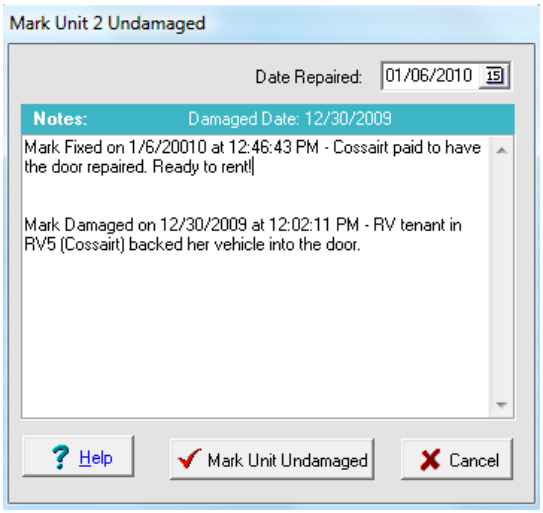
If the unit in question was a vacant unit, the rent will change with the unit type. If the unit was occupied, you will need to go to Tools -> Raise/Lower Rents to adjust the rent.

Mark Unit Damaged/Undamaged

This function allows you to mark a unit as damaged, and later allows you to note the date it was repaired

Select a unit from your list, and then go to Tools -> Mark Unit Damaged. Then make any relevant notes about the cause and type of damage, and click ✓**Mark Unit Damaged.**





When a unit is unusable, you will want to use this section to tag and explain the reason for its condition.

When marking a unit undamaged simply repeat the process above on a previously damaged unit, and click ✓**Mark Unit Undamaged** and include the date repaired. Be sure to enter comprehensive notes of both the damage and the repair for your records.

TIP: You can also perform this function by right clicking on a unit within the unit list.

Bank Deposit

This function will automatically perform a bank deposit and provide you a form to print out to give to the bank along with your deposit. It will also print out a copy for your records.

Go to Reports -> Make A Bank Deposit

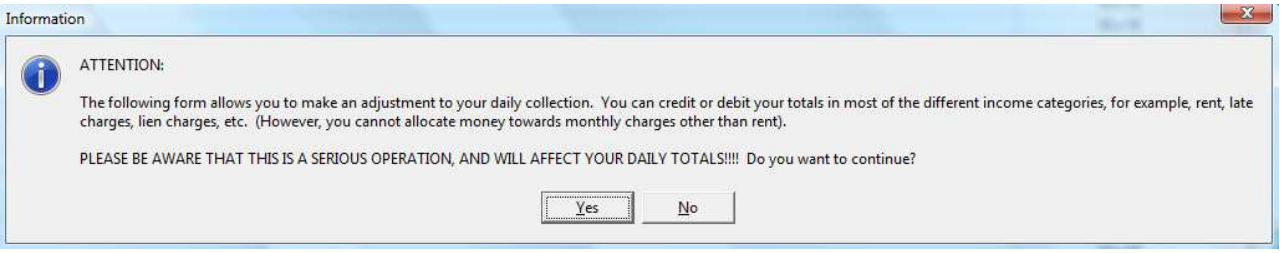
All the cash, checks, and credit card income that have been collected will appear on this deposit. It will only record payments taken since the last bank deposit.

RECOMMENDED: *Before you make a bank deposit go to the Reports menu and click on Trial Bank Deposit. This will bring up a form similar to the regular bank deposit form, but it will not go directly into your system. Do this first so that you can confirm the information is correct and so you know to make any changes before making the full deposit.*

Manager Daily Debit-Credit

This form allows the manager of a facility to make a Daily Debit or Credit to the system. This may be necessary if your deposits and collections do not match at the end of the day. This will adjust your Bank Deposit.

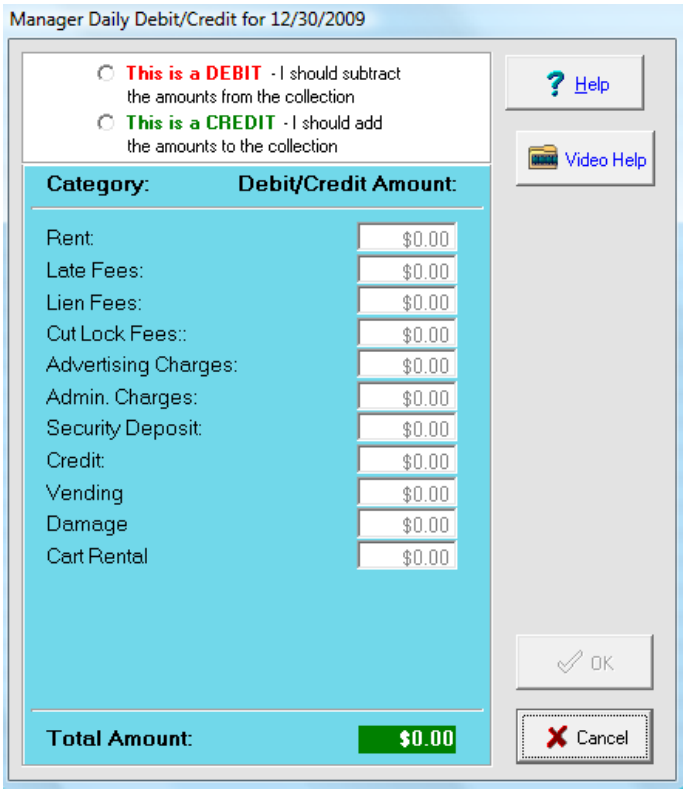
Go to Payments ->Manager Daily Debit-Credit.



A warning window will pop up before it takes you to the next screen. Please read it carefully before continuing on. If you wish to continue after reading this message, click on the **Yes** button. Click on the **No** button to return to the main screen.

First, click to choose whether this will be a DEBIT or a CREDIT to the collections for today.

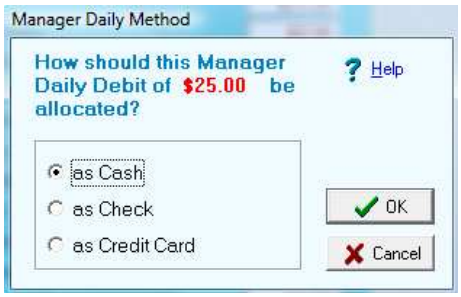
Note: *If you need to make both a credit **and** a debit you must do them separately.*



Next, enter the amounts in the box to the right of the "Category" you wish to debit/credit for today. There will be a running total near the bottom of the window.

Finally, check to make sure the amounts and total are correct, and then click on the ✓OK button to confirm.

ALLOCATE CREDIT/DEBIT



This allows you to select whether to allocate the Credit or Debit to Cash, Check, or Credit card. Select one of the three options and click the ✓OK button.

Print All Bills

This function will print all of the current bills ready to send out.

Go to Tenant -> Print All Bills.

The bills are typically printed out automatically during overnight processing. Use this function if for some reason that did not happen, or if you need to have another set of bills printed. This will automatically print all bills to be sent out. Remember, bills do not print automatically for tenants who are delinquent. At that point, the tenants should be receiving delinquency notices, not bills.

What this means is that if you do not have the bills set to print during the overnights you can use this option to print them only on the day that the bills are supposed to print out. If you try this on a different day or the bills have already printed out, you will need to use the **Print Bill For Tenant** option.

Print All Notices

This function allows you to print all notices for all tenants.

To perform this function, go to Delinquents -> Print All Notices.

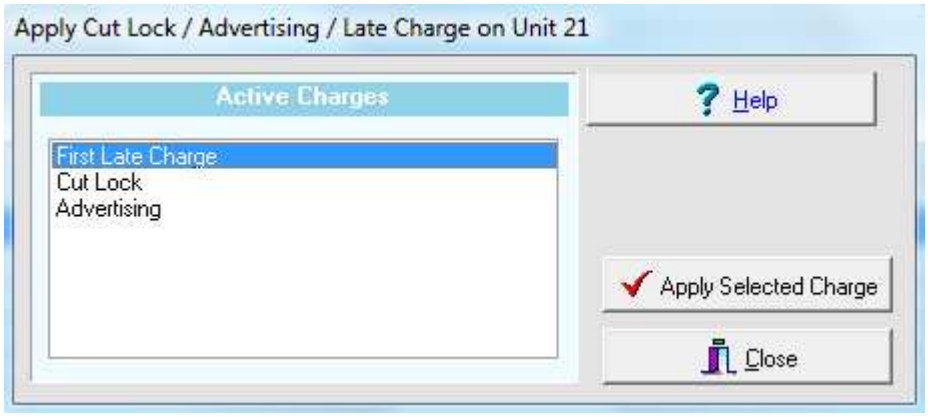
The notices are typically printed out automatically during overnight processing. Use this function if for some reason that did not happen, or if you need to have another set of notices printed.This will automatically print all delinquency notices for your site that are due **that** day.

Note: *No notices will print if you do not have tenants that were supposed to get a notice that day.*

Apply Cut Lock/Advertising/Late Charges

This window allows you to apply cut lock fees, advertising fees, or first late charges to specific units.

Go to Delinquents -> Apply Cut Lock/Advertising/Late Charges. You will then see a window like this:



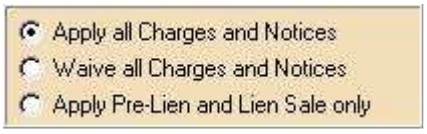
Select the type of fee you wish to apply by clicking on it. Then click the ✓**Apply Selected Charge** button to apply the charge. This automatically applies the charge, and exits out of this window. Or click on the **Close** button to exit without applying any charges.

HOW TO WAIVE OR REMOVE UNWANTED FEES

Express will apply fees and charges based on the settings in the Delinquency Setup. If you wish to make an exception to this rule, doing so is an easy process, as detailed below.

WAIVING FEES

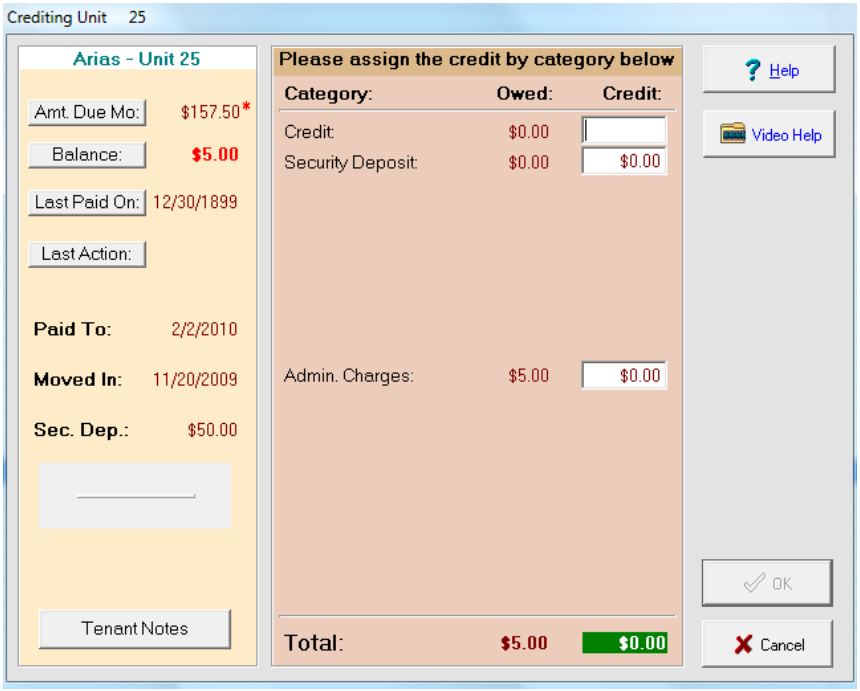
If you wish for a tenant to never receive a late fee, such as a corporate client, for example. You will need to first select the tenant from you unit list and go to Tenant -> Change Info. Click on the Misc tab at the top of the screen. You will see a box similar to this on the lower-right side of the screen:

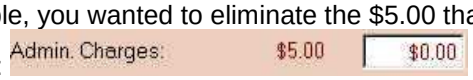


Select the first option to apply all charges and notices when applicable. Select the second option to waive ALL the charges and notices. Select the third to waive all charges and notices except for those associated with Pre-Liens and Lien Sales. Click on OK when finished. Repeat this process for each tenant whose fees you wish to waive.

REMOVING FEES

Select the tenant you wish to apply a credit to (or remove the fees from) then select Payment -> Tenant Credit. You will see a screen similar to this:



You only have the option to post a credit to the Credit category, the Security Deposit category, or any category that has money owed. In the above example, there is $5.00 owed in Admin. Charges. The procedure for applying a credit is the same as in applying a debit. Go to the category you wish and enter the amount you wish to credit in that category. If, for example, you wanted to eliminate the $5.00 that is owed in Admin. Charges, you would go to the white area in here: 

and enter

5.00. In the credit screen, the dollar amount you enter will be subtracted from the amount listed in the "Owed" column. Add credit charges in as many categories as necessary. Click on OK when you are finished. Express will require that you enter notes for this transaction. Enter whatever you feel is necessary. Including your name or initials is a good rule of thumb. Click on OK, and the credit is complete.

Post All Rents

This function will automatically post all rents in your facility.

To perform this function, go to Delinquents -> Post All Rents.

It will ask you if you really want to perform this function. If so, click the ✓**OK** button. You will then have a date range window come up where you can enter the dates that you wish to post for. This automatically evaluates all the tenant records, checks what payments have been made, what payments are due, whether there are any late charges, etc., and then posts this information to update the tenant records.

This option will have to be used if you have performed the Undo Move-Out function on a tenant past the date of when his Paid-to-Date would be.

Note: Rents are usually posted during overnight processing. You should only use this function if you need an individual rent posted or if for some reason it was not done during overnight processing. It will only post rent if a tenant's rent is scheduled to post that day.

Backup Database

This function creates a daily backup of your entire database.

To perform this function, go to File -> Backup Database.

You can protect yourself against downtime by backing up your data on a regular basis. Although serious computer issues do not happen very often, and we hope they never do, it is still a possibility that some a harddrive failure or virus could cause you to lose key information. Planning for such a contingency could save you hours or even days of work re-entering lost information.

Each night, during overnight processing, Express will automatically create a backup of your database. However, you may also perform a manual backup at any time of both your database and non-database files (notices, usage logs, etc)

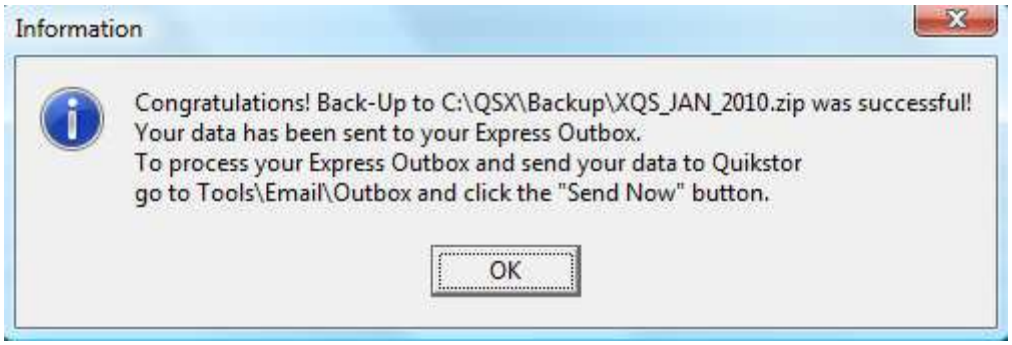
Your database files are saved in the .zip format. Each backup will be named for the day of the week it was created (XXX_MON.zip, XXX_TUE.zip, etc). This will save a copy automatically to your C: drive.

When you are finished with your backup click the ✓OK **button.**

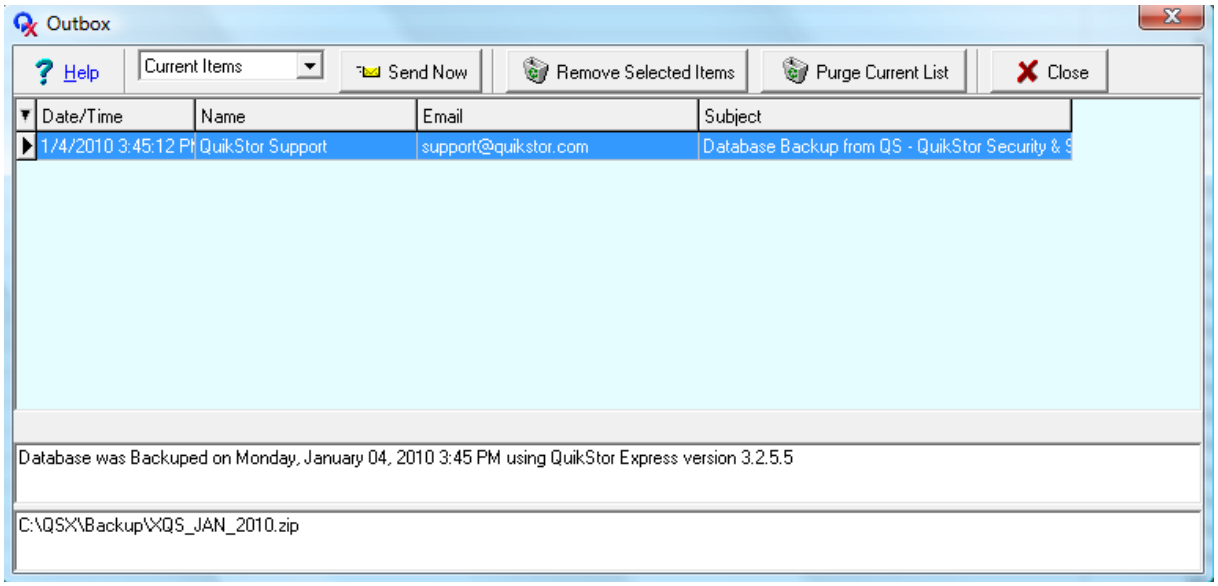
SENDING A BACKUP TO QUIKSTOR

Sending a backup of your data to QuikStor Support for testing and diagnosis is an easy process.

Go to Tools -> Support -> Backup Database and Send it to QuikStor. You should see a screen like this:



Click on OK, and then go to Tools -> Email -> Outbox. The Outbox should look like this:



Click on the Send Now button (

), and Express will send the data to QuikStor Support.

WHY DOES MY BACKUP FROM YESTERDAY HAVE TODAY'S DATE ON IT?

Express has two methods of backing up your database, and each has a similar, but slightly different, file naming convention.

Two backups are created whenever either method is accessed, with these file naming formats:

SiteAbbreviation_DayOfWeek.zip
SiteAbbreviation_Month_Year.zip

The Site Abbreviation is up to three characters, and is set up in File -> Site Setup -> Site tab. If nothing is in that field, the Site Abbreviation will be XXX.

IF YOU MANUALLY BACKUP YOUR DATABASE:

The day of the week, month, and year are all based on today. This gives you a backup of how the information looks at this moment.
If your site abbreviation is ABC and you manually run a backup on Friday, January 1, 2010, the first file will be called ABC_FRI.zip, and the second will be ABC_JAN_2010.zip. Both files will have a modified date of 1/1/10.

AUTOMATIC BACKUP DURING OVERNIGHT PROCESSING:

The day of the week, month, and year are all based on yesterday. This gives you an end-of-day backup and an end-of-month backup that reflect how the information looked at the very end of the day or month for which they are named.

If your site abbreviation is ABC and overnight processing ran the backup at 12:20am on Friday, January 1, 2010, the first file will be called ABC_THU.zip, and the second will be ABC_DEC_2009.zip. Both files will have a modified date of 1/1/10, as this is when the files were created.

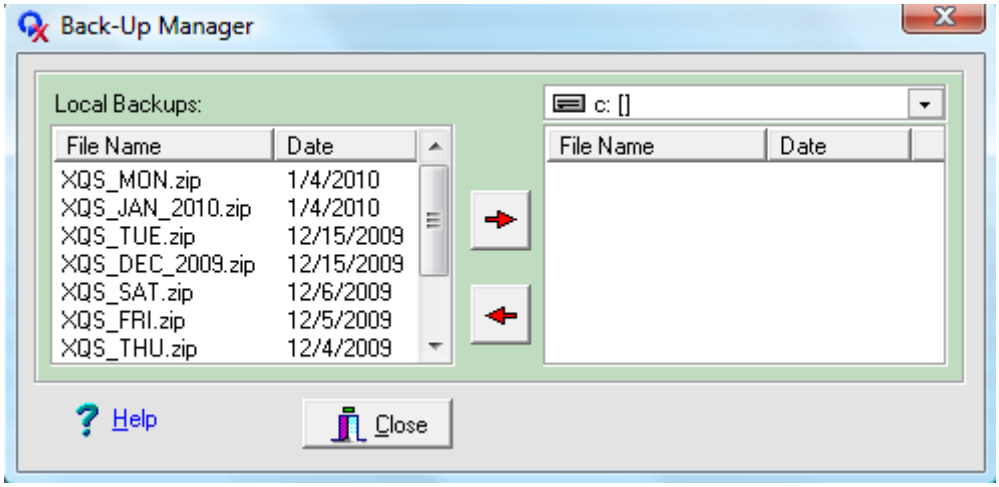
Backup Manager

This window will allow you to save your backups to a different location or to retrieve a previously saved backup from one of those locations.

To perform this function, go to File -> Backup Manager.

Express automatically saves backups of your data when it runs overnight processing. It creates one backup per day, and once a month it creates a monthly backup of the entire month. By default it saves these backups to a directory locally. You may wish to save these backups to another location to prevent a loss of information in the unlikely event your computer or hard drive should fail.

You will see a window similar to this when using this function:



In the left side of this window you will see a list of all backups. They will be named for days of the week (XXX_MON.zip, XXX_TUE.zip, etc) or by month (i.e. XXX_DEC_2009.zip) and will have the date they were backed up. This list is sorted by date with the most recent backup on top.

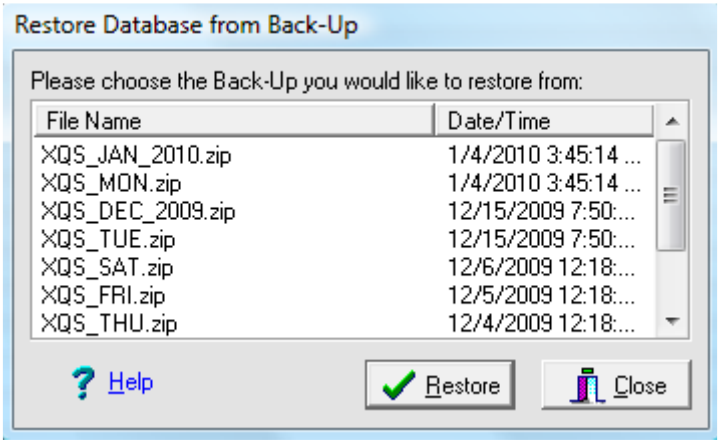
At the top of the right side of this window, you will see a pull down menu. On this menu is a list of all drives connected to this computer (external hard drives, network drives, CD burners, etc). In order to save to one of these drives, select a backup, select a drive from the pull-down menu, and click the ➔ button.

If you wish to retrieve a previously saved backup, select the drive you saved it to, select the backup you want to restore, and click the 🡐 button.

Restore Database

This function is used to restore a specific database

Note: *This function should only be performed after consulting with QuikStor Support. All of your current data may be erased if this selection is performed incorrectly.*



Restoring your database will take all of the information from your selected backup replaced your current data! Use caution when performing this function.

Go to File -> Restore Database. This will bring up a window where you can choose which database you would like to restore. Select a database from the provided list and click on the ✓**Restore** button. This will restore the selected database. If you do not wish to restore a database, click the **Close** button to return to the main screen.

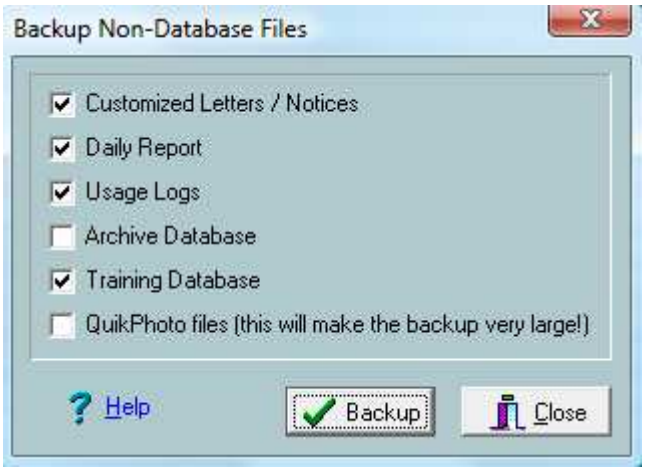
IMPORTANT: *DO NOT CHANGE THE COMPUTER DATE WHEN REPOSTING PRIOR DAYS WORK! ALL PRIOR DAYS WORK MUST BE RE-ENTERED ON THE CURRENT DAY. FAILING TO DO SO RESULTS IN SEVERE CORRUPTION AND POSSIBLE LOSS OF YOUR ENTIRE DATABASE.*

Backup/Restore Non-Database Files

QuikStor Express has the ability to not only backup and restore your site's data, but also has the ability to backup and restore your non-database related files. Such as your customized letters/notices, usage logs, archived data, training data, and QuikPhoto files.

BACKUP

Go to File -> Backup/Restore -> Backup Non Database Files. You will see a window like this.

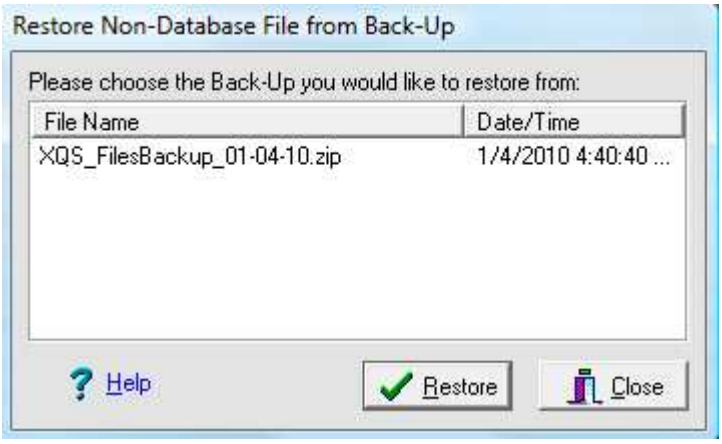


Select which items on this list you would like to backup by checking or unchecking the boxes and then click the ✓**Backup** button.

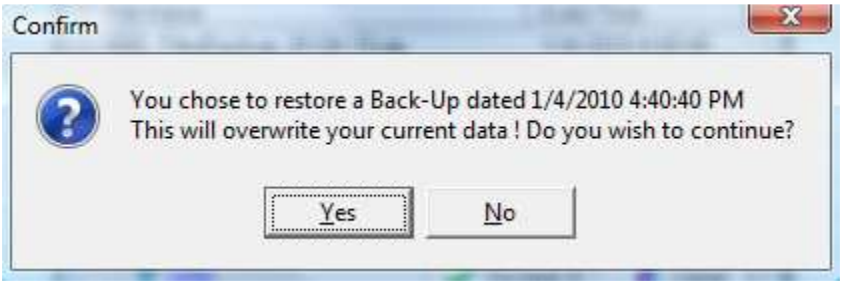
This confirmation window shows you the path of the backup file. Click the OK button to return to the backup screen. Click on the ✓**Backup** button again to make an additional backup, or click on the **Close** button to return to your main screen in Express.

RESTORE

Go to File -> Backup/Restore -> Restore Non Database Files. You will see a window similar to this.



Choose the backup that you wish to restore and click on the ✓**Restore** button. Depending on which non-database files were backed up, this will overwrite your existing files. You will get a confirmation screen like this after you click the Restore button.



Click on the Yes button to confirm the restoration of the non-database files, or click No to go back to the previous screen without restoring.

Once you are done with this click on the Close button to return to the main screen in Express.

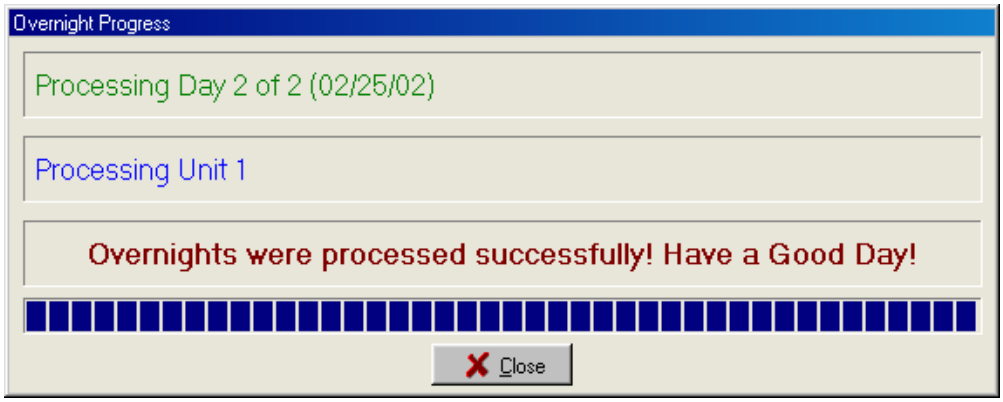
Overnight Processing

QuikStor Express's Overnight Processing allows you to walk away when you are done for the day. Express will automatically post new rents, late charges, print bills and certified letters, etc. – all in the middle of the night. The following are some of the most popular functions run during Overnight Processing.

The function overnight processing performs is a backup of your data. It then prints a Daily Report (E-N) for the previous day, and a Red Locks to Take Off (E-Y-J) report. Then, it processes your units.

Each unit is checked for, among other things, rent changes, rent to be posted, bills and notices to be printed, and charges to be applied. Auto CC Charges are processed during this step, as well as Auto Checking Account Billing.

Then a Three Available (E-E) and a Red Locks to Put On (E-Y-R) report are printed. Finally, if it is the first of the month and there has been insurance activity in the prior month, an Insurance Activity Report (E-Y-K) is printed. At this point, if you are set up to do so in Internet Settings, the Outbox is processed. Finally, there is a message displayed on the screen that looks like this:



If you do not see the above screen saying that Overnights have processed successfully when you arrive in the morning, chances are they didn't. Express has protection against the Overnights not completing – to activate them, just close Express and re-open it. When you log in, Express should resume the Overnights where they left off.

BROWSING DATA

Browse Data

The Browse Data menu is located on the toolbar. This menu contains a list of viewing functions that allow you to quickly review current information without having to print a report. Most of these sets are for viewing purposes only and the information on them cannot be changed through this function. Each item on the drop down menu is explained in detail below:

ALL TRANSACTIONS

This function gives you a list of all of the transactions that have been made at your facility.

These transactions are ordered by date. The report shows you the date of the transaction, the unit number, the tenant's last name, the amount, the balance, type of transaction, Paid-To-Date, receipt number, and the time the transaction took place.

This is the only function in this menu that you can do more than just view. You can also re-print receipts or view a more detailed explanation of each transaction. To view a more detailed explanation of a transaction select it from the list and click the ➚ **Select** button. When you are finished with this function click the ✓**OK** button to go back to the previous window.

You can also re-print or email receipts for payments by clicking the **Re-print / Email Receipt** button. This button will not appear unless the transaction is a payment (or another transaction that produces a receipt).

To exit, click the Close **button.**

PAYMENTS

This screen provides a list of all payments made at your facility. These payments are ordered by date. Notice that the report shows you the date of the transaction, the unit number, the tenant's last name, the amount (if any) paid, how payment was made (cash, check, etc.), the amount of rent posted (if any), and the late charge posted (if any).

BANK DEPOSITS MADE

This window provides you a list of all bank deposits you have made in your system. These are shown in order by date. Note that the screen shows you the date and time each deposit was made, the amounts deposited from cash, checks, and credit cards, and a running total for the month. You can also run a "Preview Bank Deposit" (E-M-1) report.

MOVE-INS/MOVE-OUTS

This screen provides a list of all move-ins & move-outs. By default these transactions are sorted by date, newest to oldest, but you can sort on any column. Notice that the form shows you the date of the transaction, the unit number, whether it is a move-in or move-out, unit size, unit location, and door type. There are also buttons for Tenant Notes and Transaction History to review these information for a selected tenant.

FORMER TENANTS

This window provides you a list of all former tenants and which units they occupied. These are listed in order by date. Note that the screen shows you the move-out date, the tenant's name, unit number, move-in date, outstanding balance, and total days in the facility.

This window also allows you to undo a move-out. Select the unit from the list and click on the **Undo Move-Out** button. Click **Yes** when asked if you are sure that you want to move the tenant back in, then click **OK**.

In addition you can take a payment for a former tenant, view transactions for a former tenant, or run a "Vacating Report".

VACANCY

This screen displays a list of each unit type, and the information regarding each type. This list is ordered by unit size. Note that it shows the unit size, number of existing units for each type, how many are vacant, what the scheduled rent is for each unit, what the unit type is, the floor they are on, the type of door, height, and whether the unit has inside or outside access.

When you select a unit type from the list, the small box in the top right corner of this window will show you which unit numbers are available (if any) for that type. It also displays if the unit is damaged, and the date restored.

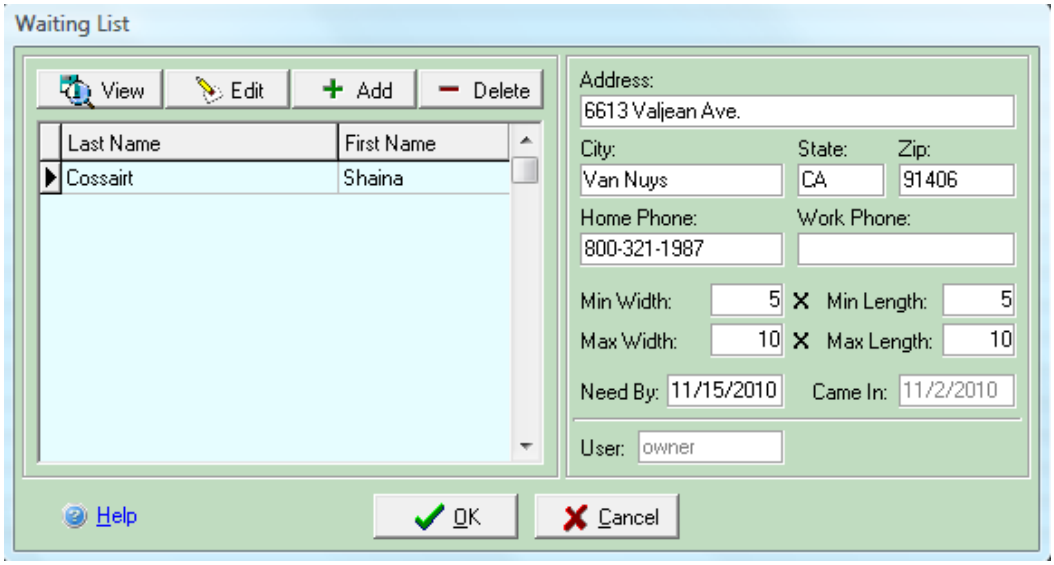
The "Type Report" (E-U) can be printed on this screen as well.

WAITING LIST

There are times when you will have full occupancy or not have a certain unit type available. For those times a Waiting List has been added into the program. On this screen you can enter in the prospects name, address, date desired, and desired unit type.

This screen can be located not only on the Browse Data menu, but also from the main screen of Express by clicking on this icon:  .

When you access the Waiting List you will see a screen similar to this:



Once you have the waiting list open it will show you all of the people who you have on the waiting list for your facility, as well as information about the future tenant, and information about the type of unit they are waiting for.

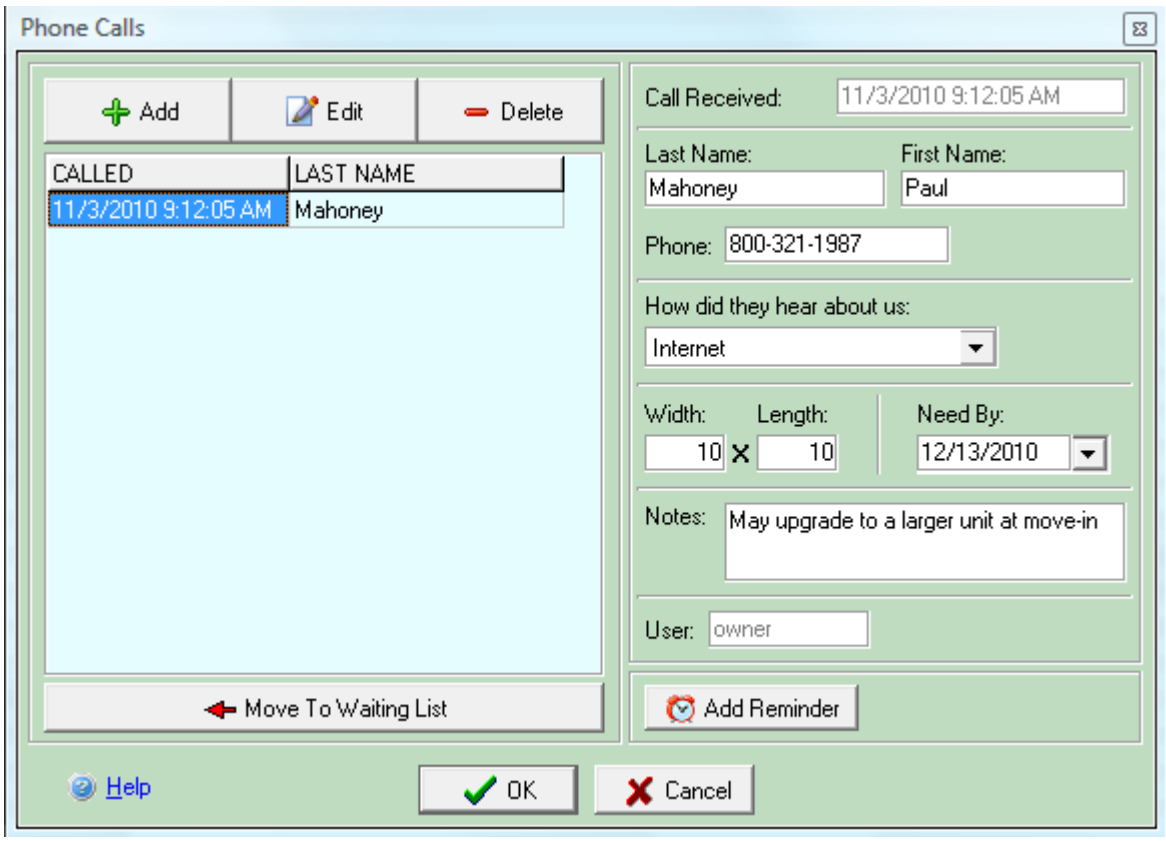
You can add, edit, or delete people from the waiting list at any time.

PHONE CALLS

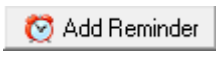
The Phone Calls menu will simplify the process of keeping track of potential customers that call your facility. This will provide you an easy method of following up later.

This function can be accessed not only from the Browse Data menu, but from the main screen of Express by clicking on this icon:  .

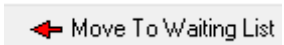
When you access the Phone Calls window you will see a screen similar to this:



When a new call comes in, click the Add button, and enter the person's information during the call. You can always edit or delete the information later using the Edit and Delete buttons.

Click the 

button to put an automated reminder into the Calendar.

You can click the 

button at any time to transfer the person to your waiting list.

TABLES SNAPSHOT

This is a handy feature that allows you to browse the data directly in the most common data tables in Express. These include:

- Payments
- Late Notices
- Bills Sent
- Daily Totals
- Bank Deposits
- Rent History
- Tenants
- Moved In/Out
- Damaged Units
- Reserved Units
- Insurance Activity
- Former Tenants
- Gate Activity

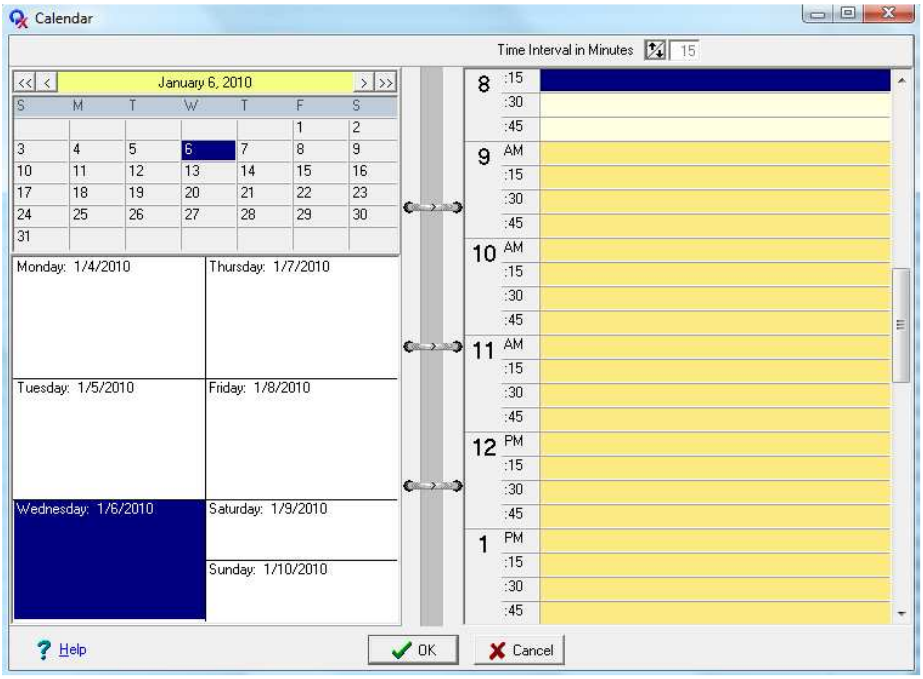
UTILITIES

Each of these utilities can be found on the Tools menu of the toolbar.

Site Notes – Calendar

This window allows you to keep track of events that take place at your site.

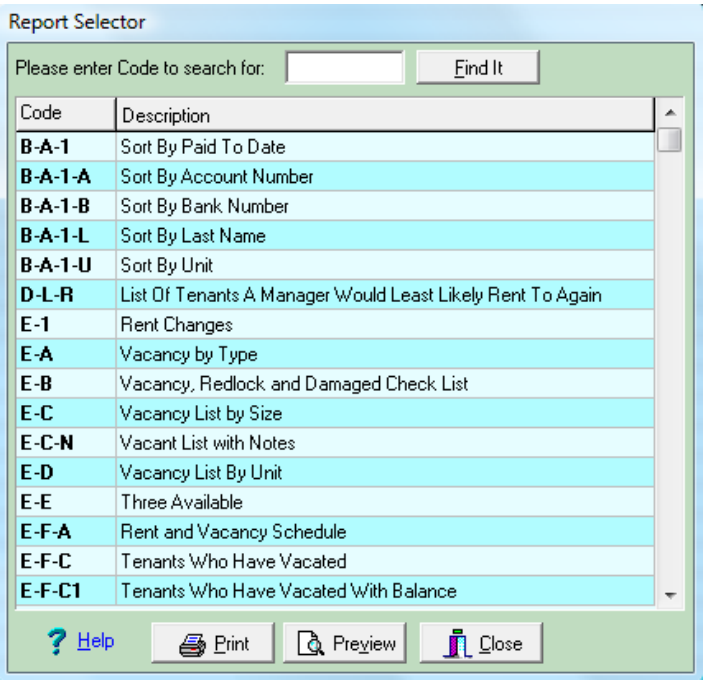
Go to Tools -> Calendar



With this window you can calendar certain events such as units cleanings, due dates for bills, or any other non-tenant review. You can leave small notes for yourself about certain things that are going to happen and what day and time they will occur. It automatically enters unit reservations, marking units damaged, and expected Move-In/Out dates.

Once you are done editing the calendar, click the ✓**OK** button.

Report Selector



This feature allows you to quickly search and select reports by their report code.

Go to Reports - > Report Selector

This list is sorted by the report code. If you know the code of the report that you need, you can enter it in and click "Find It", or you can simply scroll through the list until you find the report. Select it and click on the *Preview* button.

If a date range is needed for the selected report a date range box will appear. Once you specify the date range the report will then be processed and displayed.

You can also print the selected report directly from this screen by clicking the *Print* button.

Click on the Close button to exit from this window.

Upload All Key Codes

Note: *This feature is only available with QuikStor's access control system or with an integrated 3rd party gate system.*

This function allows you to upload all of your key codes from Express to access control keypads.

Go to Tools -> Upload All Key Codes.

This sends all of the key codes from Express into your access control system. You should only have to do this during the initial installation of Express. After the initial upload, gate codes are automatically sent to your gate system when added or edited. Deletions are also automatically sent to the gate system when someone moves out.

Outbox

This window allows you to store your backup databases in QuikStor that are going to be sent to another recipient, along with any other outgoing email concerning this site.

Note: *You must complete the Internet Setup for this function to work correctly.*

Microsoft Outlook Module Users *– if you have the Outlook integration you will not have an outbox in Express. All emails will be be sent via Outlook. You can still compose emails in Express, but they will be sent through Outlook.*

Go to Tools -> Email -> Outbox. It is similar to using any email program that you may already have. It contains any data backups that you are considering sending to QuikStor support or elsewhere. You can set it up so that all of this information will be sent during your overnight processing or you may do it through this window manually.

When you are finished with this window click the ✗Close **button.**

SEND EMAIL

This window allows you to send email to tenants at your site.

Start by selecting a unit from your list. Then go to Tools -> Email -> Send Email

This window works just like any other email program that you may have. It allows you to email notes, or reminders to your tenants. This is different from the Outbox function, since this one is just for sending things that you've written, not databases, bills, or reports.

When you are finished with this window click on the ✓Send **button.**

HOW TO EMAIL BILLS, NOTICES, AND/OR RECEIPTS

Express provides you with the option to email bills, notices, and receipts to a tenant's email account, to give them a separate copy for their reference.

These documents will be sent out either when you process the outbox manually, or when overnights occur (if you have this setting enabled).

You will need to configure the following settings to make sure they will process and send correctly:

INTERNET SETUP

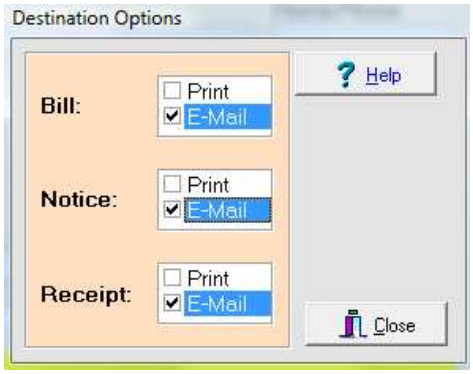
First, you will have to make sure that you have the Internet settings correctly set up, working, and that you have a valid Internet account. Do this by going to File -> Internet Setup.

TENANT INFORMATION

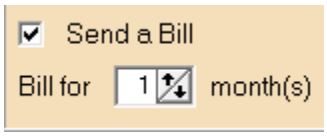
Set up your tenants to receive the bills, notices, and/or receipts.

Select the tenant you wish to have these emailed to, then go to Tenant -> Change Info.

Tenant Tab – Enter an email address for this tenant in the field given. This will be the email address that the bill/notice/receipt is sent to.



Next click the "**Destination Options**" button and confirm that the "email" option is checked beside all of the items you want emailed to this tenant.



Miscellaneous Tab – If you want these to automatically be sent during overnight processing for this individual tenant, click on the miscellaneous tab and put a checkmark beside the "Send a Bill" option. You can also select how many months you want to sent a bill for in advance.

Click on the ✓Ok button to save your changes and exit.

BILLING SETUP

This feature allows you to setup multiple tenants at one time to send bills, notices, and/or receipts. If your tenant information already includes email addresses, you this menu option for quick billing setup.

Go to File -> Billing Setup

Once you have set the above options you should now be able to successfully send bills, notices, and receipts to your tenants.

Why Didn't My Express Email Process During Overnight Processing?

There are a number of reasons why your emails may not have processed overnight. Here are a few things to check before contacting QuikStor Technical Support:

1. Is your Internet account correctly configured?

    - Confirm that your e-mail and Internet work OUTSIDE of the QuikStor program (using your email client and web browser). Try to send an email from your email client to where you are sending the backup or Daily Report to see if it gets to them correctly.

2. Is Internet Setup in Express configured properly? (File -> Internet Setup).

    - Confirm that you have a facility e-mail address, an SMTP server name, and an account name in the appropriate fields. If desired, also check to make sure the "Send Database Backup to Outbox during Overnight" or "Send Daily Report to Outbox during Overnight" has a check in the appropriate spaces, with recipient's e-mail addresses properly entered.

3. Are there multiple backups in the Outbox? (Tools -> E-mail -> Outbox).

    - If there are quite a few in here, this would show that there has been a problem sending backups for a longer period of time than just the one day.
        - One reason for this could be the email server you are sending these backups to is full (i.e. if you have a large backup, 2 or 3 days of backups without the person you are sending it to checking their e-mail (and downloading their messages) will fill their mailbox's allotment preventing you from sending anything until this is done). You can click the *Purge Current List* button to clear all pending emails and start again if you wish.
        - Conversely, your Internet Service Provider (ISP) may not allow large files to be attached to outgoing emails. Contact your ISP to verify if you think this might be the case. If it is, you will have to either reconsider the importance of emailing data backups or consider changing Internet providers

4. Is the tenant's information correctly configured to send e-mail? (Tenant -> Change Info)

- If the problem you are having is with sending bills, etc to a specific tenant, and other tenants are processing correctly, then it could be that their email and email information are not set up correctly. Verify their email address is entered in their *Tenant Tab*, and that their *Destination Options* are set email.

If after going through all of the above procedures you still are experiencing problems with sending email during your overnight processing, or manually through QuikStor Express, please contact QuikStor Technical Support.

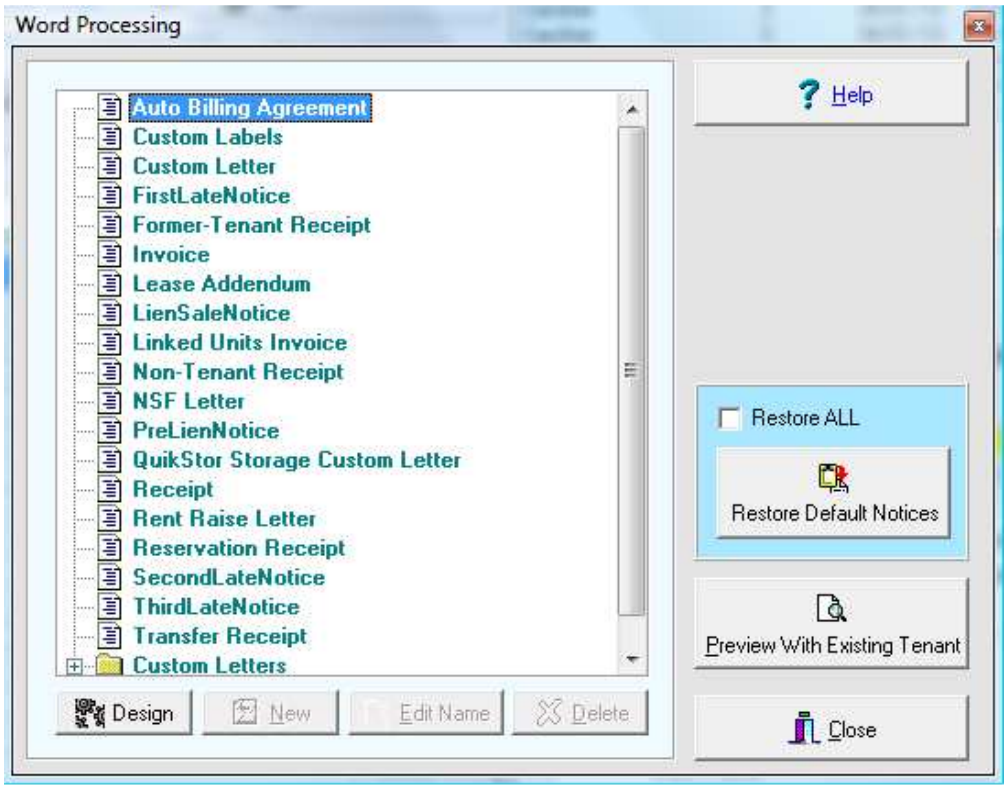
Word Processing

This window allows you to customize the layout and design of the notices and letters to your tenants by using the word processing program included with QuikStor Express.

Go to Tools -> Word Processing. There will be a list of the various documents within Express that you can edit using this function.

EDITABLE DOCUMENTS

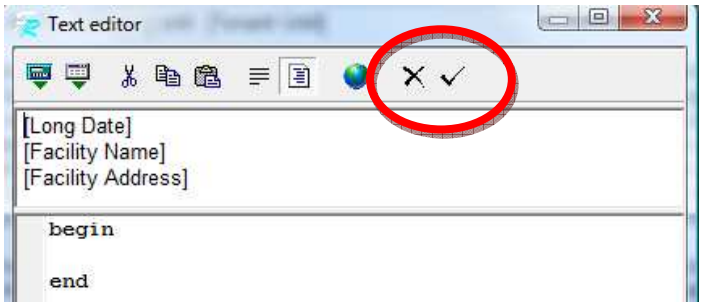
NOTE: If you are using QuikStor Express Lite you are only able to edit the Pre-Lien and Lien Sale Notices.



The first time you use this function, it may be a good idea to first click on the checkbox next to “Restore All” and then click the “Restore Default Notices” button. This will confirm that all notices are as they should be. Note that you have the ability to do this for an individual notice or letter at any time, so no matter what you do to any given document, there is no amount of damage that would make it so far gone as to be completely irreparable.

Click on the document you wish to edit, then on the “Design” button at the bottom left.

What you now see is the document format. Anything in [brackets] is a variable. Anywhere you see text is editable.



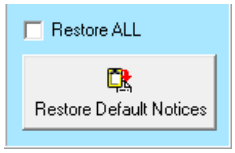
Double click on the white box of the section you wish to edit. This will bring up a text editor that will allow you to add/change/delete text and variables. In the upper right area of the text editor are an X and a check mark, among other icons. Hold your mouse over each icon to see what they represent – but be aware that the X exits the text editor without making changes and the check mark exits the text editor and applies whatever changes were made.

If you need to expand a text block, you can do so from the document format screen by first selecting the text block (single click on it), then click & hold while any of the black squares on the outer edge of the text box. Drag the box to its new location causing the box to expand or shrink. If you wish to delete an entire text block, select it (single click) and press the "delete" key on your keyboard. If you wish to add a text block, click on the icon on the left side of the screen (if you hold your mouse over it, it will read "Insert RichText Object"), then click, hold, and drag the mouse to the area you wish to have a new text box.

The "Master Data" areas should remain untouched – this is the area where Express displays calculations and breakdowns. Be careful if you must edit these sections!

If you wish to add a page, go to Edit -> Add Page. Once you have added a page, you can switch between pages using the tabs at the top of the editing area.

When you are finished editing your document, you can find the Close button near the top of the screen – press that button and Express will ask if you wish to save your changes – if so, say yes.

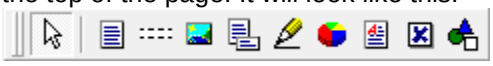


If you make a mistake and wish to restore the notice to its original format, you can select it and click the **Restore Default Notice** button. To restore all edited documents, check the **All** box and click the **Restore Default Notice** button.

ADDING GRAPHICS

Inserting graphics in your documents using the Express word processor is just as easy as inserting text.

Locate the the Objects Toolbar. It will either be located vertically on the left side of this page, or horizontal at the top of the page. It will look like this:



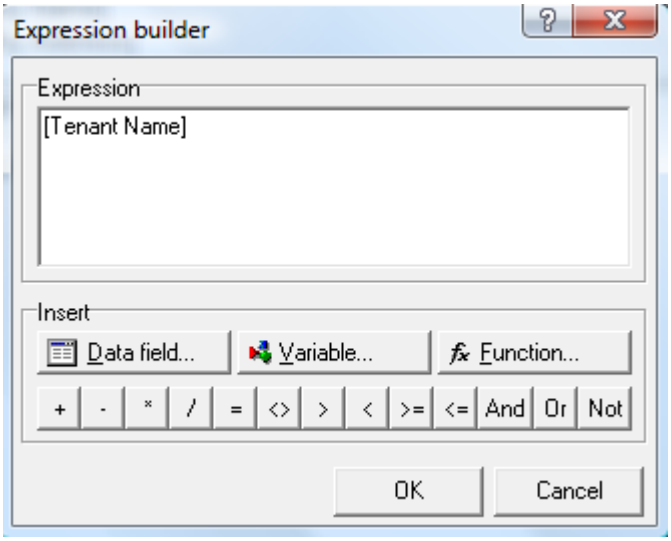
Click on this button , and you will be able to place an image on your letter as you would a text block. Select the image file you would like to place in that location by clicking on the "Load" button and selecting the location and file from the window. Change the size of the image in your document the same way you would resize a text window – click to select the image, then drag and drop the corner of the image.

To exit, click the Close button.

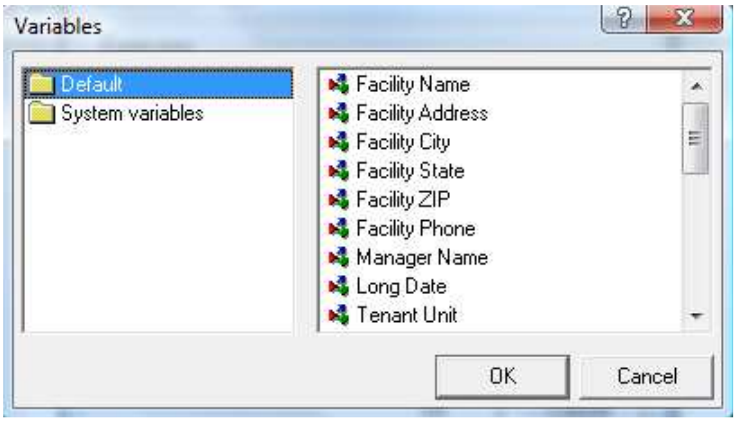
ADDING VARIABLES

A variable is a pre-defined data source that inserts the associated value or text into a selected notice/letter automatically. Variables are indicated by surrounding "[ ]" bracket symbols while in the word processing edit window. For example, if I had a variable called [rent], I would include it in my report as I did in this sentence.

Go to Tools -> Word Processing. Click on the document you wish to edit, then on Design. Double click in the area you wish to add the variable and a Text Editor window will appear. Select the spot where you wish to insert the variable, and click on this button  . This will bring up the Expression Builder window, which looks similar to this.



Within this window click on the "Variable" button and you will get a window that looks similar to this.



A list of all available variables in Express for this report or letter will be shown. Scroll through the list and select the variable you wish to insert, and then click the OK button.

This will then take you back to the Expression Builder window. Variables must be entered individually. Once you are done, click on the OK button and you will be back at the Text Editor window and you will now see your variable listed. If that is the only change you wish to make click on the  button to return to the document.

At this point, it would be a good idea to make sure that the Variable that you chose to insert into this document works the way you want it to. Click the Print Preview button ( ) for a preview of the document on the screen and you will see if this is how you want it to work. If it is, save the changes and exit back to your main screen of Express. If not, go back through the above steps to find the variable that you wish to use.

I'VE JUST CUSTOMIZED A DOCUMENT IN WORD PROCESSING, AND NOW IT WON'T PRINT!

Word Processing in Express is a powerful feature, but it is also very easy to make a mistake.

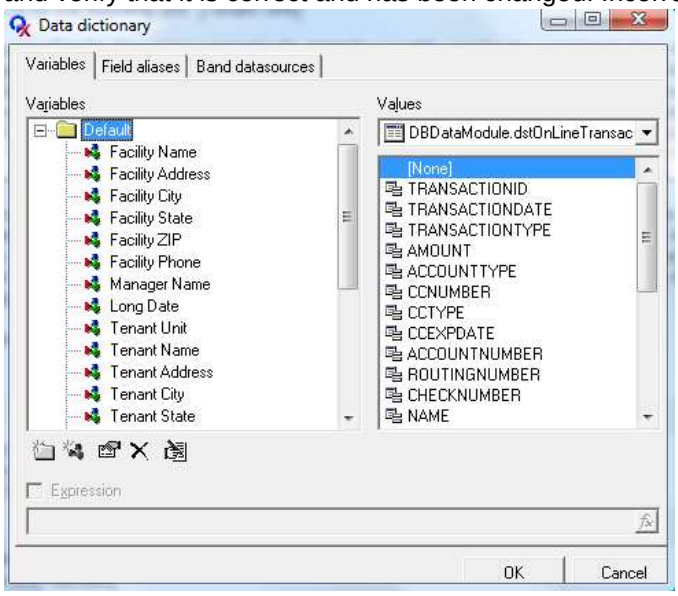
The most common mistake, and the one that will prevent the letter or notice from printing, is misuse of variables.

To Express, a variable is anything enclosed by brackets. For example, if I had a variable called [rent], I would include it in my report as I did in this sentence.

Variables must be defined in such a way that Express knows what they are. This means that the program must know what the variable refers to in the software, and the variable must be named exactly what the program expects it to be named. Variables are utilized on a letter-by-letter basis, so variables used in the First Late Notice may or may not be available for use in the Pre-Lien Notice. Because this is very complicated, it is recommended that you only use the variables that are noted in the default letter that you are trying to edit.

However if you do make a mistake and experience printing issues, you can remove the variable(s) that are creating the problem. The easiest way to do this is to restore to the default letter and start again, using only the variables that are in the default letter. To do this from the main screen of Express go to Tools -> Word Processing, and then select the notice or letter you wish to work with and click "Restore Default Notice."

If you do not want to restore and use the default template, you may go through each variable in the letter and verify that it is correct and has been changed. Incorrect spacing, spelling, etc could all cause variable issues.



The easiest way to do this is to write down each variable that you manually entered into the document and then go to File -> Data Dictionary. This will give you a list of all of variables within the specified letter,

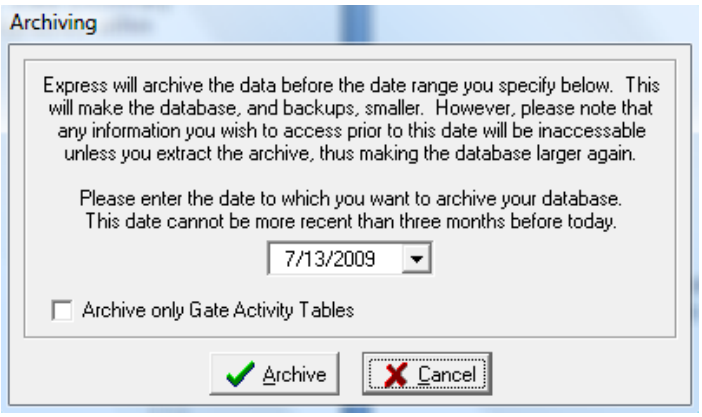
ARCHIVE DATABASE

Before archiving, please confirm that you have ran the Backup Database function to ensure that no data will be lost during this process.

ARCHIVE DATA

This function allows you to archive your current database. This will make your database and backups smaller and faster to work with.

Go to Tools -> Archive Database. A window will come up that looks similar to this:

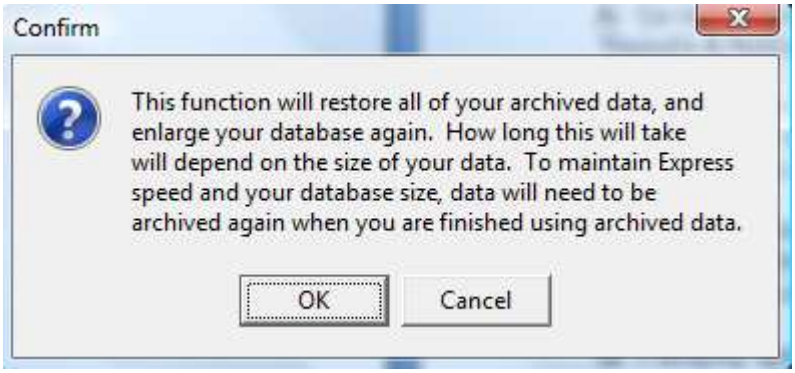


Select the date you wish to archive up to, and then click on the Archive button. ***Note:*** *The default date that comes up on this form is 6 months prior to the current date.*
Once you have clicked on the Archive button it will begin the process of archiving your current data. This may take several minutes depending on the size of your database, and the dates you chose to archive.

RESTORE ARCHIVED DATA

This function will restore your archived data into your current database. Using this function will increase the size of your current data, so your QuikStor Express software may run a little slower after you perform this action depending on the date range and quantity of data.

Go to Tools - > Extract Archive. A window will come up that looks similar to this:



Click on the OK button to continue restoring the archive, or click on the Cancel button to go back to your main menu without performing this function.

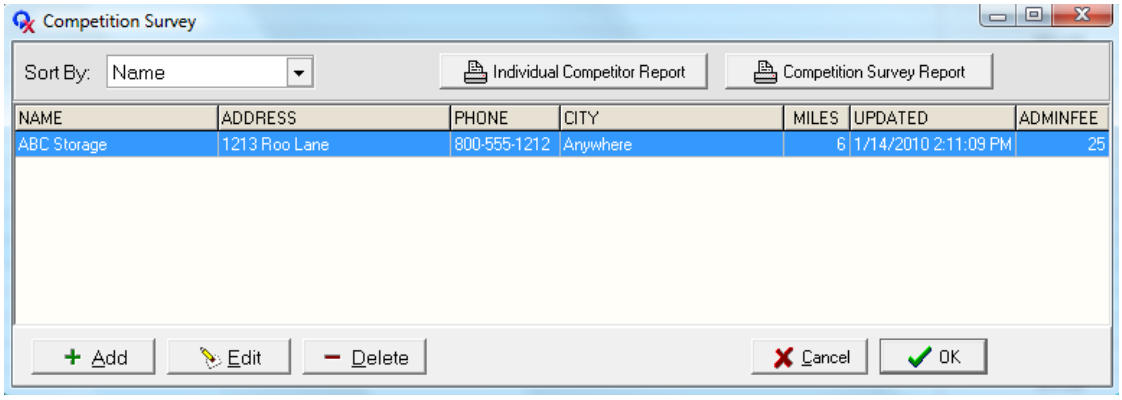
MARKETING

This section walks you through the various detailed marketing reports that can be found in Express. This is a powerful set of reports that can provide you with useful graphs and analysis of competition in your area or how well specific advertising campaigns are working for you.

All of the following reports can be found under the Marketing menu on your main toolbar

COMPETITION SURVEY

This feature provides you with a place to enter in as much information as is known about your competition. This could include unit sizes, occupancy, specials offereed, amenities, miles from your facility, etc. Once all information is entered you can choose to run a report on an individual competitor by clicking the Individual Competitor Report button or you can run a report on all competitors listed by clicking the Competition Survey Report button.



GRAPHS

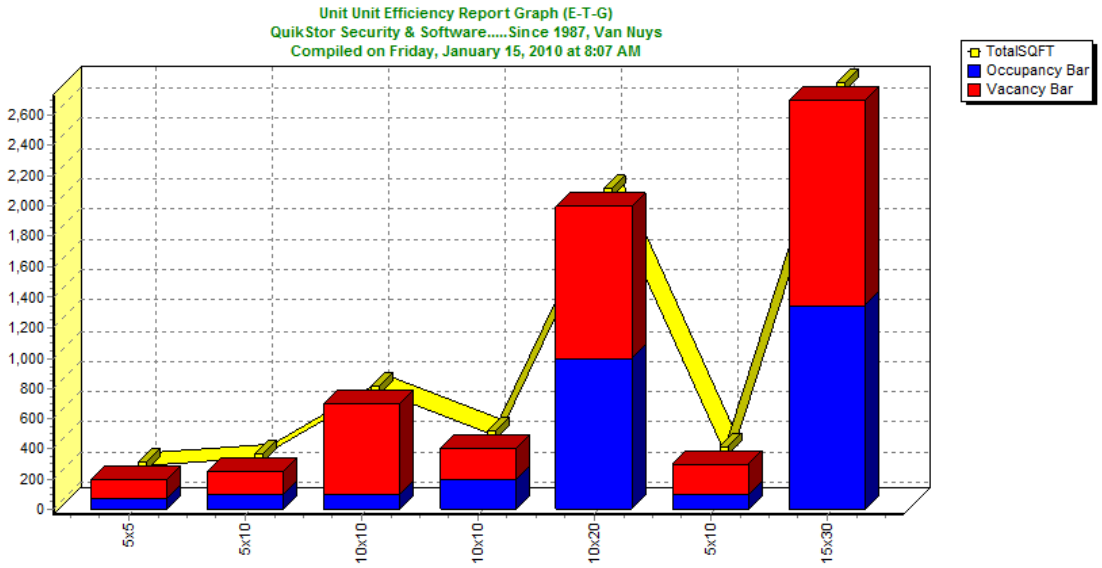
This section provides marketing reports that breakdown into graph format

TENANT SOURCES GRAPH (E-L-C-G)

This graph displays how your tenants are getting to you based on your sources list. It shows numbers and percentages of tenants referred by each source.

UNIT EFFICIENCY REPORT GRAPH (E-T-G)

This is a great graph providing a quick snapshot of how many square feet each unit type is using and what percentage of that square footage is occupied or vacant



CITY ANALYSIS (E-L-E-G)

Based on the City Analysis (E-L-E) report, this provides you with a graphical representation of how many tenants you have from each city.

MONTH END ANALYSIS GRAPH (E-R-M-G)

This graph shows you your monthly income, vacancies, and receivables.

DAILY ANALYSIS GRAPH (E-R-E-G)

Similar to the month end graph, this graph provides a daily analysis of income, vacancies, and receivables. You can enter a single day, or a date range for this graph.

TOTAL OCCUPIED VS. TOTAL UNITS (O-V-U)

This graph provides a snapshot of how many of your total units are currently occupied

PROFILE BREAKDOWN (E-L-Q)

This option is actually three marketing reports in one. The first part of the report lists the tenant profiles for your facility, including how many tenants were moved in under each profile, the average rent for each profile category, percentage of tenants, and percentage of rent. Some profiles which may apply are “Personal,” “Commercial,” “Military,” “Hospital,” etc.

The second part of the report analyzes the distance from your facility that your tenants travel from. Included on this report are the total tenants counted, the total with no mileage entered (not included in the report), and the average mileage of all the tenants. Further, a breakdown of the number of tenants and the percentage of the total for distance is given for one, two, three, four, five, six to ten, eleven to twenty, twenty-one to fifty, and over fifty miles.

The third part of the report shows the breakdown of tenants at your facility who are male, female, or “other,” which is used for entities such as companies that rent units at your facility.

Tenant Sources

This section provides three marketing reports having to do with tenant sources. Below is a description of each:

TENANT SOURCES (E-L-C)

This report lists all the sources of tenancy, with number and percentages of tenants referred by each source.

TENANT SOURCES FOR A DATE RANGE (E-L-D)

Useful for planning marketing strategy, this report shows the sources of your tenants for a given time period.

TENANT SOURCES FOR REVENUE BREAKDOWN (E-L-O)

This report shows the source of current tenants for a given time period, as well as revenue collected for each source. It also lists the percentage of revenue from each source.

ZIP CODE ANALYSIS (E-L-F)

This report provides information showing which ZIP codes your tenants are from.

CITY ANALYSIS (E-L-E)

This report shows how many tenants you have from each city.

MILES FROM SITE (M-F-S)

This report analyzes the distance from your facility that your tenants travel from. This report has two sections. The first is a breakdown of the move-ins for the date range you specified, and the other shows all occupants. Included in this report is the total number of tenants, percentage, plus a further breakdown of personal and business tenants. This breakdown shows a percentage based on total distance in the following increments: less than one mile, one to three miles, three to five miles, five to ten miles, ten to twenty miles, over twenty iles, and Out of State.

DEMOGRAPHICS REPORT (T-D-R)

This report gives you a breakdown of all of the units and the demographics of where your revenue is coming in. This report is sorted by Unit number and has columns for Source, Profile, Sex, Miles From Site, Zip Code, Length of Stay (Months), and if they are a Truck Customer (if applicable).

NOTE: All of these reports and graphs can be saved in PDF format, printed, emailed, or emailed easily to QuikStor Technical Support.

Specials & Discounts

This section provides reports specific to specials & discounts that you have assigned at your facility

LIST OF ALL SPECIALS (S-P-L)

This report provides a list of all Specials that have been setup in Express. It provides the Special title, description, whether or not it is available online, and which unit types are associated with it. It also shows if the Special is currently available or not.

LIST OF ALL SPECIALS (S-P-L-2)

Similar to the S-P-L report, it lists all specials setup at the property, including details such as status, coupon codes, etc.

SPECIALS AVAILABLE TODAY (T-S-L)

This report is similar to the S-P-L report, except it only shows those specials that are available on the current date.

LIST OF ALL PRICE LEVELS (P-L-L)

This report provides a list of all Price Level's that have been setup in Express. It will show which unit types are associated with the price level, whether it is currently active, and whether or not it is applied to eCommerce.

PRICE LEVELS CURRENTLY EFFECTIVE (T-P-L)

This report provides a list of all Price Level's that are currently active in Express. It will show which unit types are associated with the price level, whether or not it is applied to eCommerce, the scheduled rent, and the adjusted rent based on the price level.

MOVE-IN DISCOUNT TRACKING (M-T-D)

This report lists all move-ins that were performed with a Special, including Pro-Rate, Rent, Monthly Charges, Income Account, Inventory, Admin. Fee, Security Deposit, and a Discount Total of all discounts given for that move-in. A Grand Total is tallied at the bottom of the report for all move-ins during the selected period.

MOVE-IN DISCOUNT TRACKING DETAIL (M-T-D-2)

This report, similar to the M-D-T report displays discounts given during a move-in with a Special. This report breaks down each discount on its own line for further detail and auditing. A Grand Total is calculated at the bottom of the report.

REPORTS

REPORT OPTIONS

The key to any successful management software is accurately and easily showing the owner or manager the data they need. There are literally hundreds of reports in Express that have been designed from a storage owner's perspective to provide the information you need in a clean and easy to understand format.

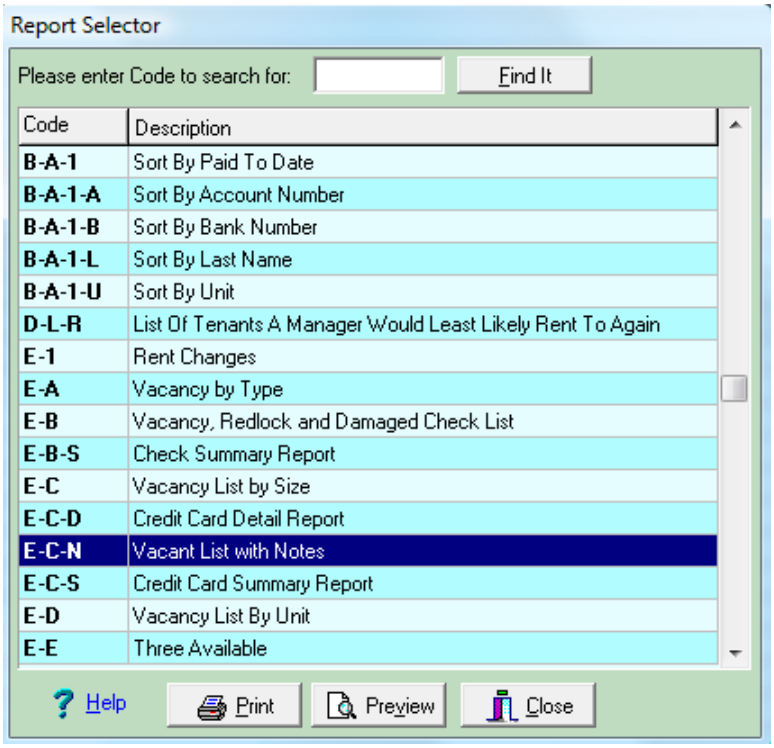
Before we get into the details of the report section, let's familiarize ourselves with some of the more common screens and functions that you will be using while working with reports.

DATE RANGE SELECTION:

Depending on the report type, you will often need to select a date range to view data during a certain time frame.

Enter in the dates desired manually or by clicking the small calendar icon next to each date to select your dates from a calendar window.

USING THE REPORT SELECTOR:



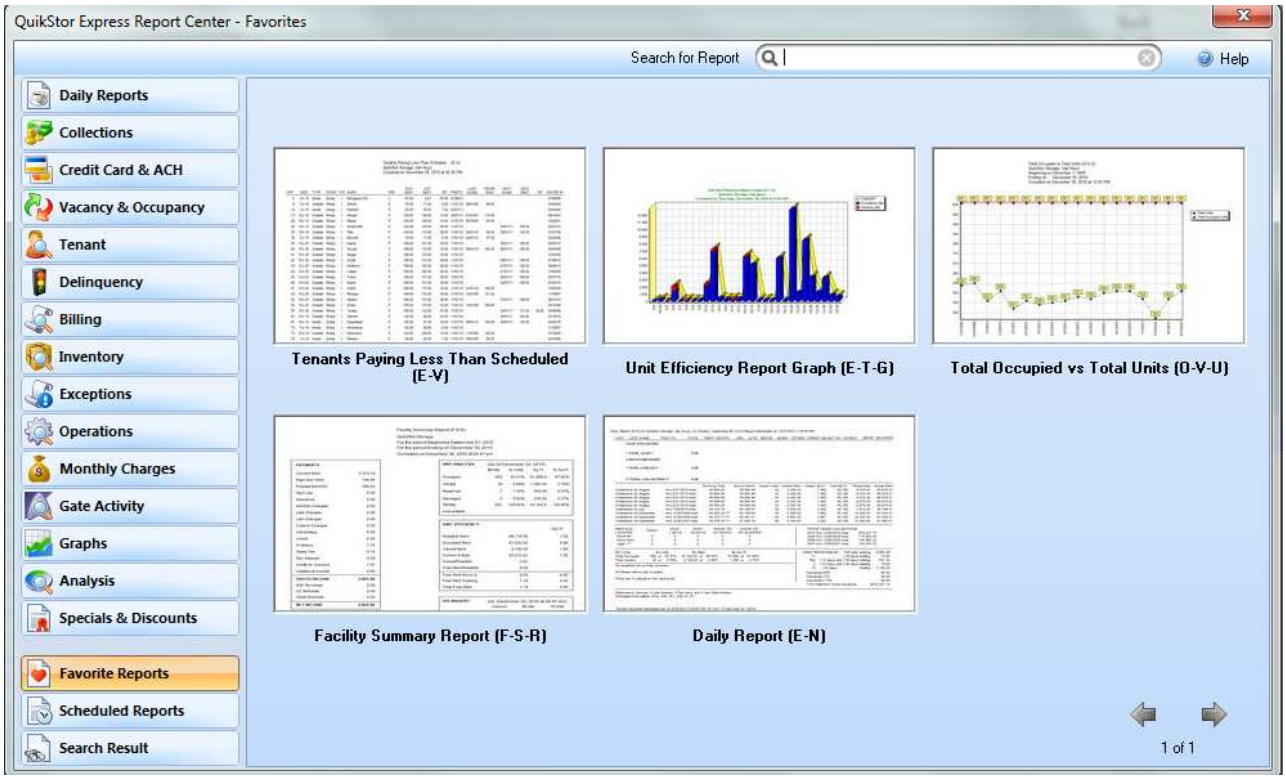
The Report Selector allows you to quickly browse through reports by scrolling through a list or by entering the report code. The report code structure was originally implemented in the QuikStor for DOS management software 20+ years ago, back when using keystrokes (not a mouse) was the only way to navigate through menus. As a courtesy to our loyal DOS converts we have added the ability to enter in a code to quickly find the report you are looking for.

REPORT CENTER

The *Report Center* is a new way of searching, previewing, and grouping your 150+ reports! In the Report Center you can see a preview of any report along with a detailed description. A search box allows you to search on keywords or titles. And quick links to add any report to your Scheduling module or to the Favorite Reports section.

To access the Report Center, go to the Report tab and click the 

button. You will see the following screen open. The first time you open the Report Center it will default to the Daily Reports section. Once you select Favorite Reports it will subsequently open to that tab.



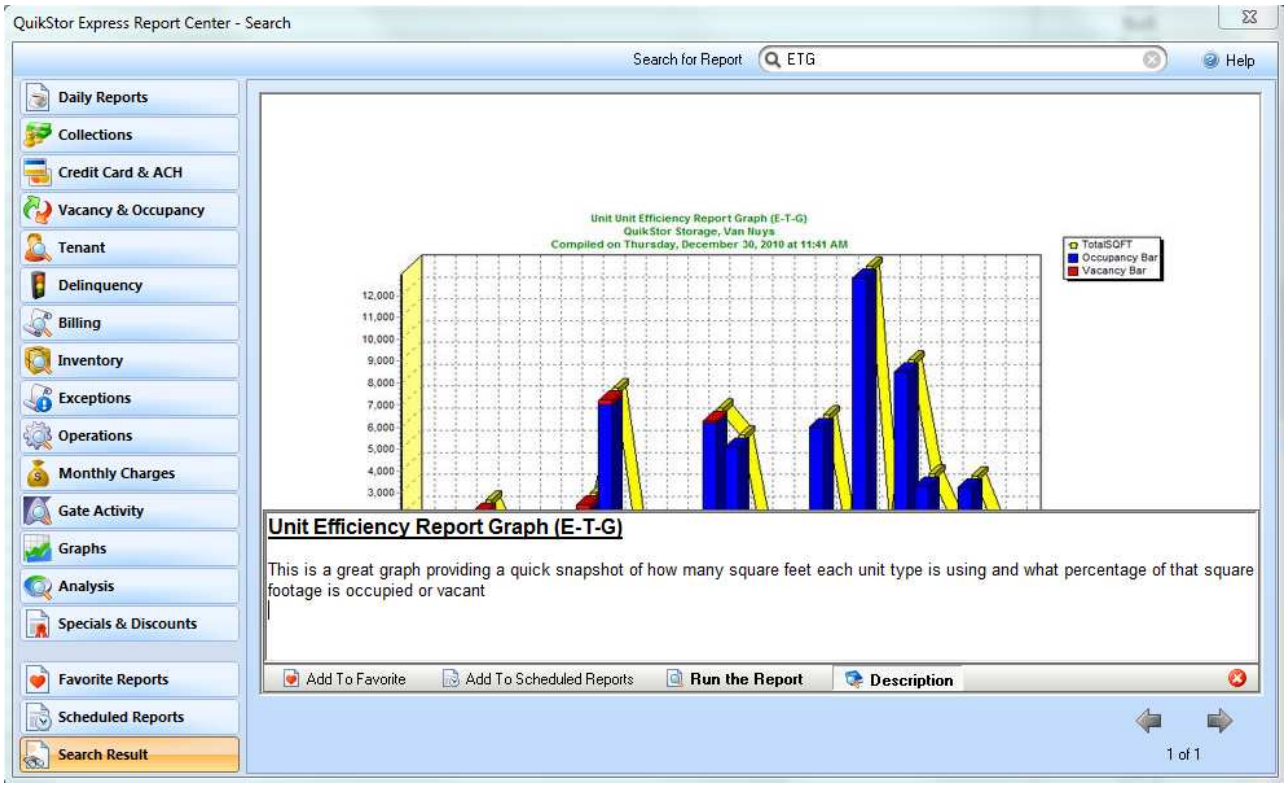
At the top of the screen is a search bar that allows you find the report you are looking for by using the report name, description, key word in the report, or abbreviation (i.e. E-N).

Up to six report previews will be shown at one time. If there are more reports for a selected tab or search, you may use the arrow buttons at the lower right hand of the screen. The number of pages of reports is listed below the arrows.

tip The report images on this screen, as well as the previews, are NOT your live facility data but merely screenshots of the same report with sample data. You can always open a live report by double-clicking the report image.

On the left side of the screen are tabs for each report section available in QuikStor Express. Below the report section tabs you will find tabs for your Favorite Reports, Scheduled Reports, and Search Results (shows all reports in the last run search).

Once you find the report you are looking for, or one that you would like to learn more about, simply click the report image once to bring up the screen below:



This screen enlarges the report preview and provides several options:

- **Add to Favorites** - this button will add the selected report to your Favorite Reports menu
- **Add to Scheduled Reports** - this button will open the Report Scheduler and allow you to add & schedule the selected report to the list of reports that are printed/emailed during Overnight Processing.
- **Run the Report** - clicking this button will run the selected report with your live facility data (the same as if you had run it from the Report menu)
- **Description** - this button will bring up a brief description of the selected report to give you an idea of why you would want to use this report at your facility and which information it will provide you.

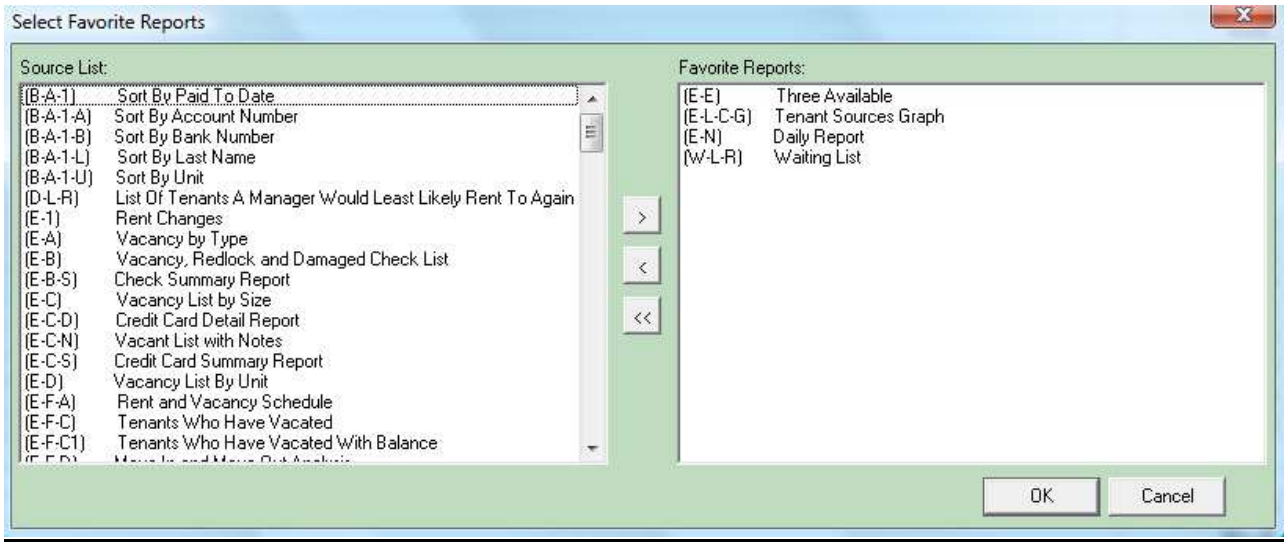
To exit from this preview screen, click the red button at the right of the screen.

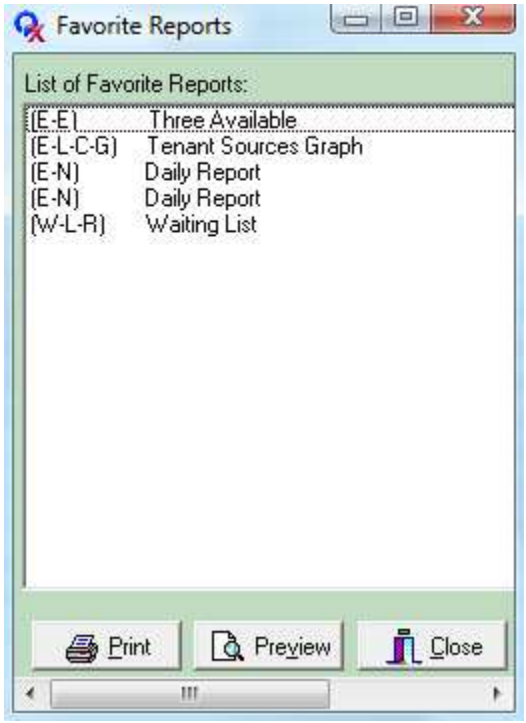
SETTING UP AND USING THE FAVORITE REPORTS UTILITY:

The *Favorites Reports* menu option allows you to bookmark your most commonly used reports.

You must first setup your list of favorite reports by going to Tools -> Select Favorite Reports.

Here you will see a window with split boxes. The box on the left is a list of all available reports. The box on the right will show the favorite reports that you have selected. To select a report, highlight it in the left window and click the > button. To remove a report from your favorites list, highlight the report you want to remove and click the < button.





Once you are finished setting up your list of favorite reports, go to Reports -> Favorite Reports option and you will a screen similar to the one on the left.

There is a Favorite Reports icon in both Classic View and Modern View to allow quick access to these reports!

Highlight the report you would like to review and either select *Preview* to open the report on screen or *Print* to have it print to your printer.

Click the *Close* button when you are finished.

REPORT SCHEDULER:

For more information on the Report Scheduler, please see the Overnight Report Scheduling section of this manual.

EMAILING REPORTS

Express provides the ability to e-mail any report to your home office, QuikStor Technical Support, or any other e-mail address you desire.

These documents will be sent out either when you process your Outbox manually, or when overnights occur (if you have this setting enabled).

You will need to set up the following items before reports will process and send correctly.

INTERNET SETUP

First, confirm that you have your Internet settings correctly setup. Please see the *Internet Setup* section to setup your Internet parameters. During that setup can also choose whether to have the Outbox process during overnight processing or not.

SITE SETUP

Set your Site Settings to always Preview Reports and Notices. That option can be found at File -> Site Setup -> Printing tab. Make sure "*Reports and Notices Only – Preview before printing*" is checked. Click Save & Exit once that is properly set up.

EMAILING THE REPORT

Select the report that you would like to email by either going to the Reports menu, or by pressing the Preview button in the Report Selector. When the Preview of the report is displayed, click on the email button. You will see three available options:

1. **Email** – allows you to enter the email reciepient of your choice
2. **Email Home Office** – this will automatically enter the home office email address that you entered under Internet Setup -> Reports on Demand
3. **Email QS Support** – this will automatically enter the QuikStor Technical Support email address of support@quikstor.com

Depending on which option you choose, enter in the email address you want to send to and click the Send button. A message will come up letting you know the message is in your Outbox. If you have selected to process your Outbox during overnight processing, then the message will send when your overnight processing runs. If you want to send it sooner, or don't have that option set, you can manually send the messages in your Outbox by selecting Tools -> Email -> Outbox, and clicking the Send Now button in that window.

tip If you are using the Outlook Integration module your email will automatically be sent and processed through Outlook as soon as you click the Send button.

DAILY REPORT

Below is a breakdown of each report in this section:

DAILY REPORT (E-N)

Without a doubt this is the most important report to obtain a snapshot of your facility! Many people in the industry call the exclusive Daily Report in Express the, “5 Minute Manager” because it is literally that quick to see how your facility did that day.

This is a detailed, yet simple, report showing all of the activities from the previous day. Typically the Express computer is left on overnight, with the Express program running, and shortly after midnight the daily report is printed automatically. If the report is not run overnight, it should always be run first thing the following morning.
The first section of this report shows all the cash, check, and credit card payments and totals, then a grand total of all collections. Any manager discretion transactions made are also detailed. Then the total collections to date for this month and the previous months to the same day are detailed.

The next section is a summary of the day’s Move-Ins and Move-Outs, prior year collections, current occupancy status, and aged receivables. Next is a list of any delinquency notices sent, and how many of each. Following this is a detail of any transactions made in the petty cash system, plus the current balance of the petty cash account. All damaged or otherwise unavailable units are listed below this. Lastly, if there are any daily notes, they will be printed at the bottom of the report.

DAILY REPORT FOR A DATE RANGE (E-N)

The same report as above, but also provides a date range option if you want to review data over several days.

OCCUPANCY AND COLLECTION REPORT BY UNIT TYPE (E-N-1)

This report shows you a breakdown, by unit type, of the percentages of occupied versus vacancies. It shows you a percentage based on units, rent, and square footage. On the right column there it also shows the prior year collections received from each unit type.

TRIAL BANK DEPOSIT (E-R-O)

This report is identical to the actual bank deposit, except that it may be run any number of times during the day without resetting the marker determining the start of the report. It is a wise decision to run this report before running the actual bank deposit to determine if your deposit matches your actual collections.

You can also run this report from the main Express screen by clicking on the  icon.

CREDIT CARDS TO BE DEPOSITED (E-R-O-1)

This report shows a list of credit cards to be deposited. The report will show the unit, payment date, name, amount, and authorization number.

Collections

This category concerns money collected. Below shows a breakdown of each report category in this section:

DAILY ANALYSIS (E-R-E)

You can select the desired date range for this report. It will then show you, in date order, the day's collection, running total for the month, the number of vacancies, the total rent for the vacancies, the vacant square footage, and the total receivables separated by cash, checks, credit cards and checks/cash.

COLLECTION DETAIL (E-P)

This report provides a detailed account of your collections for a given time period.

COLLECTION DETAIL FOR ALL TENANTS (E-P-A)

Start by selecting the desired date range and sort order (Payment date, unit, or last name). This report will then list all of the payments made during the specified time frame, sorted in the selected order. Listed fields will be the payment date, unit, tenant's last name, Paid-to-Date, total amount of the payment made, and the breakdown of the categories which made up that payment, including rent, monthly charges, late fees, insurance, security deposit, administration, cut locks, credit, sales tax, and inventory.

COLLECTION DETAIL FOR EXISTINGTENANTS (E-R-J)

This is the same as the "Collection Detail for All Tenants" listed above, except this will only calculate existing tenants.

CASH-ONLY COLLECTION DETAIL (E-R-4)

This report lists all of the cash collections for a given time period.

COLLECTION/DEPOSIT (E-Q)

Start by selecting the desired date range.The report will display the following information:

Summary of your actual collections: Rent, monthly charges, late charges, security deposits, administration fees, locks, miscellaneous charges, credit, sales tax, and inventory collections made during the time period you selected

Rental analysis: Totals of scheduled rent, rent collected, future rent, current rent, past due rent, and free rent given

Unit efficiency analysis: Totals of possible rent, possible occupancy, current rent, rent for occupied units, and rent for vacant units

Delinquent notice analysis: Totals of each notice sent, the number of units advertised, and NSF totals

Vacancy & Receivables analysis: Totals for vacant units, vacant rent, vacant square feet and receivables

MONTH-END ANALYSIS (E-R-M)

This report totals the monthly collection versus Actual Rent, number of vacant units, amount of vacant rent, amount of vacant square feet and the total receivables for the current month

PERCENTAGE OF INCOME BY CASH, CHECK, AND CARDS (E-R-F)

Shows the percentage of collections by cash, check or credit card. It may be printed for any date range. Included is the number of transactions, the amount by category, and the percentage by category.

COLLECTIONS SINCE THE FIRST (E-R-G)

This report calculates the total number of payments and amount of money collected since the first of the current month. The information is categorized into the number of payments and dollar amount for each payment type (cash, check and credit card).

REVENUES COLLECTED PER UNIT (E-R-I)

This report will calculate, in unit order, the total revenues taken in on each unit for a given time period. It will display the tenant's name, their current balance, their Paid- to-Date, and the total revenues.

DAILY ANALYSIS FOR POSTINGS AND COLLECTIONS (D-P-C)

This report shows the posted rent and collections for each day in a defined date range. In includes the start of day receivables and end of day receivables for each date. Both the posted and collected rent sections are broken down into categories such as rent, rent tax, monthly charges, etc. A summary of all posted and collected rent for the defined time period is shown at the bottom of the report.

NON-TENANT INCOME (N-T-I)

This report will show all non-tenant purchases during a given time period. It will separate out the payment method for the transaction, transaction date, and sales tax paid.

REMOTE PAYMENT REPORT (P-O-E)

This report shows any payments made away from the site. This includes payments made online via eCommerce, SmartClient payments made from the home office, and Call Center payments.

ANNUAL REVENUE AND OCCUPANCY REPORT (R-I-O)

This report shows annual revenue, move-ins, and move-outs categorized in columns by each month of the year. It provides a quick snapshot of of these key indicators year after year, broken down by individual month so you can gauge how your facility is doing compared to previous years or months. At the bottom is a Quarterly Income summary, again broken down by year and months. There are totals for each section in the far right column.

MONTHLY POSTED AND COLLECTED RENTS (M-C-R)

This report shows shows, for each tenant, the amount of rent posted and the amount of rent collected for a full month. Totals are provided at the end.

Credit Card / Checking Account

This section is where you will find reports concerning credit card and checking account usage at your facility:

MASTER LIST OF TENANTS WITH AUTO CC BILLING (E-J-C)

This report will shows all tenants that are currently setup on auto billing via a credit card. It will display the tenant name, unit number, Paid-to-Date, last 4 digits of the credit card number, expiration date, and card type.

MASTER LIST OF TENANTS WITH AUTO DEBIT (E-J-C-1)

This report is similar to the credit card report above, except it shows all tenants on auto billing using their checking account.

CREDIT CARDS TO BE CHARGED FOR A DATE RANGE

This report can be sorted in the following ways:

- Paid-to-Date (E-R-1)
- Unit (E-R-1-U)
- Last Name (E-R-1-L)
- Credit Card Number (E-R-1-C)

Once the report is run, you will be able to see which tenants are scheduled to be charged that are paying with their credit cards.

BANK ACCOUNT TO BE CHARGED FOR A DATE RANGE

This report can be sorted in the following ways:

- Paid-to-Date (B-A-1)
- Unit (B-A-1-U)
- Last Name (B-A-1-L)
- Account Number (B-A-1-A)
- Bank Number (B-A-1-B)

Once the report is run, you will be able to see which tenants are scheduled to be charged that are paying with their checking account.

CREDIT CARDS AND BANK ACCOUNT DETAILS (E-R-2)

This report details all of the successful transactions, including authorization numbers from the bank or processor.

CREDIT CARD DETAIL REPORT (E-C-D)

This report shows all credit card transactions, whether they successfully were processed or not. It will show the card type, tenant information, and last four digits of the card number.

CREDIT CARD SUMMARY REPORT (E-C-S)

This report provides a summary of all credit card transactions and provides a nice breakdown of how many cards were successfully processed, failed, fraud, etc.

CHECK SUMMARY REPORT (E-B-S)

This report provides a summary of all check transactions

LIST OF CREDIT CARDS ABOUT TO EXPIRE (E-J-C-2)

This report works in various ways depending on which credit card integration you have. Due to PCI compliance regulations, certain information is not available directly in the software. Below is a breakdown of each integration and how this report is available:

- *Yapstone* – the report is available in Express
- *Plug N' Pay (Non-PCI Compliant version)* – the report is available in Express
- *Plug N' Pay (PCI Compliant version)* – expiration date information is not provided by Plug N' Pay so this report is not available.

CREDIT CARD TRANSACTIONS BY TYPE (T-C-C)

This report shows you a breakdown of your credit card transactions based on card type: MasterCard, Visa, Discover, and American Express. A total of all categories is then shown on the bottom of the report.

Vacancy/Occupancy

This section is where you will find reports concerning the vacancy & occupancy of your facility:

UNIT SUMMARY (E-S)

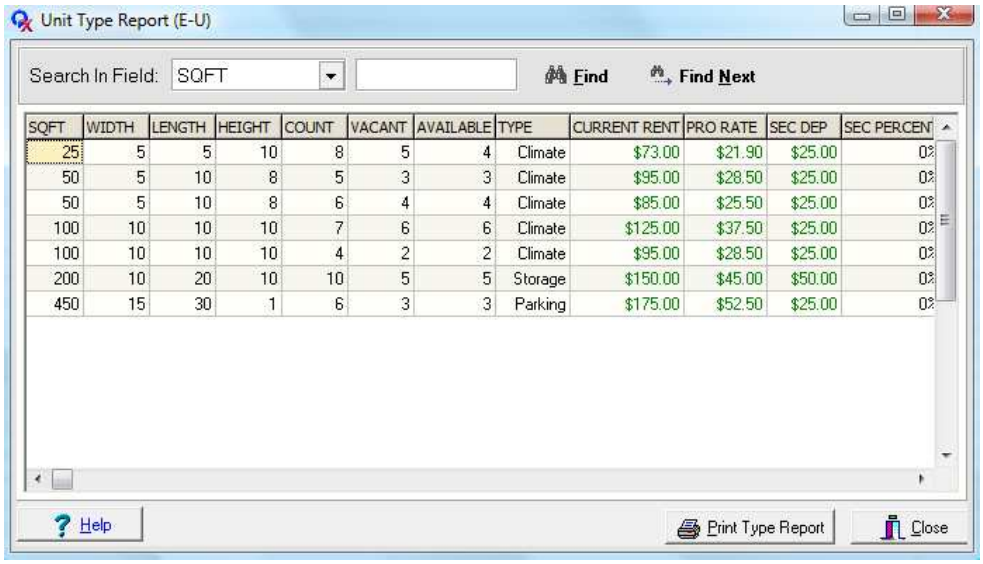
This report displays a summary of your unit types. Units are listed in order by size, including the number of units, floor, location, door type, height, scheduled rent, daily rental rate, total rent possible, total square feet and rent per square foot. Also listed are the totals for the possible monthly and annual income, average rent per square foot and per unit.

UNIT SUMMARY BY UNIT TYPE (E-S-1)

The same as the E-S report, except this categorizes the summary by unit type

UNIT TYPE REPORT (E-U)

This selection brings up a window (see below) showing a breakdown of all unit types in a detailed format. You may search a specific value or print the report.



SQFT	WIDTH	LENGTH	HEIGHT	COUNT	VACANT	AVAILABLE	TYPE	CURRENT RENT	PRO RATE	SEC DEP	SEC PERCENT
25	5	5	10	8	5	4	Climate	$73.00	$21.90	$25.00	0%
50	5	10	8	5	3	3	Climate	$95.00	$28.50	$25.00	0%
50	5	10	8	6	4	4	Climate	$85.00	$25.50	$25.00	0%
100	10	10	10	7	6	6	Climate	$125.00	$37.50	$25.00	0%
100	10	10	10	4	2	2	Climate	$95.00	$28.50	$25.00	0%
200	10	20	10	10	5	5	Storage	$150.00	$45.00	$50.00	0%
450	15	30	1	6	3	3	Parking	$175.00	$52.50	$25.00	0%

ALL UNIT TYPES REPORT (E-U-A)

This report provides a detailed breakdown of each unit type and which tenants are currently renting those unit types.

RENT AND VACANCY SCHEDULE (E-F-A)

This report provides a list of all of your unit types, in order of their size. It also provides the unit type, the monthly rent (basic and with rent tax), the daily rent (basic and with rent tax), the number of vacant units of that size, the floor they are on, the door type, whether they are inside or outside units, and the height of the units.

UNIT LIST BY TYPE REPORT (E-U-D)

This report shows a list of all units by type, which units fall into that type, and how many are currently available.

VACANCY BY TYPE (E-A)

This shows the number of vacancies, listed by the type of unit. The columns show the unit size, the type of unit (Storage, Parking, etc.), the scheduled rent, which floor the unit is on, whether the unit has inside or outside access, the type of the door, the height of the unit, total number of such units, the number occupied, the number vacant, and what percentage of that type is vacant.

VACANCY LIST (E-C AND E-D)

This lists the vacant units individually in order by size (E-C) or by unit (E-D) depending on which sort option you choose. It shows the unit number, size, type, monthly rent, date vacated, days vacant, height, floor, inside or outside, and door type.

VACANCY LIST WITH NOTES (E-C-N)

This report shows all vacant units as well as any manager notes entered

THREE AVAILABLE (E-E)

Rather than look up the available units in various sizes several times throughout the day, you could choose this report, which will show you up to three vacant units from each type, all at the same time. If there are only one or two units available in a particular size, then that's all the report will show. And, if there are no units available in a particular size, then you won't see any listing for that size.

The first column shows you the unit size, followed by the type, monthly rent, pro-rated rent, the unit numbers available, floor, door type, and whether the units are inside or outside.

TENANTS WHO HAVE VACATED (E-F-C)

This shows tenants who have vacated and any monies still owed. In unit order, the report lists the unit, full name of tenant, move-in date, move-out date, security deposit, and their balance upon vacating. At the end of the report are the number of vacancies, the number of vacancies with balance due, and the total amount owed.

TENANTS WHO HAVE VACATED WITH A BALANCE (E-F-C1)

This report provides a list of tenants who have vacated while still owing you money. In addition to providing those former tenants unit numbers, it also lists there move-in and move-out dates, the security deposit, and what their balance is. At the bottom of the report are the total number of tenants who have vacated during that date range, the total number of tenants who vacated owing you money, and the total amount of money owed by those tenants.

MOVE-IN USING SPECIALS (M-S-P)

This report displays all move-ins that used a Special, and which special was used. It displays the move-in date, scheduled rent, amount paid, source, user, and if relevant the vacate date.

EXPECTED MOVE-OUTS (E-F-G)

This report shows current tenants who have given notice that they are vacating. Information includes date of move-out, unit, name, Paid-to-Date, unit size, balance, and security deposit.

MOVE-IN ANALYSIS (E-L-N)

This report will show the move-ins for a given time frame, listing move-in date, unit number, size, last name, scheduled rent, actual rent, and discount (the difference between the scheduled rent and actual rent). Several totals are listed at the bottom of the report, including total rents, number moved in, number moved in with discount, and number moved in at scheduled rent.

MOVE-IN ANALYSIS EXPANDED (E-L-N-1)

This same as the E-L-N, but includes more details on specials and "free stuff" given during a move-in.

MOVE-IN & MOVE-OUT ANALYSIS (E-F-D)

After you select the time period desired, this report will print in unit size order, an analysis of the move-ins and move-outs that have taken place during that date range. Listed is the number of each unit type, unit size, inside or outside, door type, unit height, rent, number of move-ins, the number of move-outs, and the

net by unit, dollar, and square feet. Totals for the move-ins, move-outs, and each of the nets are at the bottom of the report.

MOVE-IN & MOVE-OUT ANALYSIS EXPANDED (E-F-D-1)

The same as the E-F-D, provides a detailed breakdown of move-ins and move-outs for a specified time period. Each move-in and move-out includes a row of details pertaining to the transactions to provide an easy-to-read snapshot. Totals are shown at the bottom of each section.

MOVE-IN USING SPECIALS REPORT (M-S-P)

This report will produce, using a date range, a report showing all move-ins that were completed using a defined Special. The report includes Unit, Name, Unit Size, Move-In Date, Scheduled Rent, Amount Paid, Source, User, and Vacate Date (if the tenant moved-out).

UNIT EFFICIENCY REPORT (E-T)

This report will produce, in unit-type order, an efficiency report for each of the unit sizes. Included in the report is the location, door type, unit height, floor, total units of this size, vacant units of this size, percent vacant of this size, scheduled rent for size, possible total rent for size, rent for occupied, rent for vacant and current actual rent for size.

UNIT EFFICENCY REPORT BY UNIT TYPE (E-T-1)

Same as the E-T but categorized by unit type

UNIT EFFICENCY REPORT BY UNIT SIZE (E-T-2)

Same as the E-T but categorized by unit size

OCCUPANY ANALYSIS REPORT (E-F-E)

This report provides you with a detailed analysis of your occupancy. It gives you totals for vacant and occupied units and percentages. The calculations are based on number of units, scheduled rent, square footage, floor, type of door, inside or outside, and units larger than or equal to a 10x10.

CONTRIBUTION TO RENT BY SIZE (E-R-L)

This report calculates the total rent for each unit type, listing the types in size order. The report displays the unit size, whether it's inside or outside, the door type, the floor those units are on, the height, the number of units of that type, the scheduled rent, the total rent for that unit type, and the percentage of your total possible rent provided by that unit type. At the very top of the report is your total scheduled rent.

RENT ANALYSIS BY SQUARE FOOT (E-R-C)

This report is used to calculate the rent per square foot for the entire site and for each of your unit types. The top of the report gives the total square footage, the total monthly rent, and the average rent per square foot. Below that, the unit types are listed by size. Also listed is the scheduled rent, unit type, square footage, door type, floor, whether the units are inside or outside, the rent per square foot, the percent of

vacant units of that type, the actual deposit per square foot and has the totals on the bottom of the report of each of the fields.

RED LOCK AND DAMAGED CHECKLIST (E-Y-I)

When you run this report, a cut off date is displayed. It will then ask if you want to include damaged units in the report. This report will list the red-locked tenants and/or damaged units on your facility. Included are their current paid-to-date, rent, balance, size, type, height, floor, inside or outside, door type, door width, and the status.

VACANCY, RED LOCK AND DAMAGE CHECKLIST (E-B)

Lists all vacant units and all red locked units in order by unit number. For the red locked units, it shows the tenant's last name and Paid-to-Date. For the vacant units, it shows the date the unit was vacated.

DAMAGED/RESERVED UNITS (E-Y-H)

When you select this report, a sort order menu will come up. Select either by date or by unit. This report will list all damaged units on site, the date it was marked as damaged and any notes you have entered for that unit. It will then list all reserved units on site, the date they were reserved, who they were reserved by and the amount paid at reservation.

LIST OF RESERVED UNITS (E-Y-H1)

You can sort this report by reserved date, unit or by last name. This report will list all of the reserved units in order by unit number. It also shows the future tenant's last and first name, date reserved on, date held until, security deposit, and admin fee.

ONLINE RENTALS AND RESERVATIONS (O-R-R)

This report will produce, by date range and source, a report that shows you all reservations and rentals that occurred via online sources, such as eCommerce, an online listing company like Sparefoot.com, etc. You can filter which source you want to display for targeted reports. The report shows the unit, unit size, tenant name, reservation date, move-in date, move-out date, source, and point of entry. A summary at the bottom with the total number of reservations and rentals is included.

ONLINE/INTERNET CONVERSIONS (O-R-R)

This report will produce, by date range and source, a report that shows all online reservations that converted to rentals. The report shows the unit, unit size, tenant name, reservation date, move-in date, move-out date, source, and point of entry. A summary at the bottom with the total number of conversions is included.

Delinquency

The sad truth is that some tenants just do not pay their rent on time. Most of them just need a late notice as a reminder, but there are others who become so delinquent that you have to send them Preliminary Lien Notices or Lien Sale Notices. You will probably want to have this work done automatically by Express, but there will be cases that you will want to give special attention. Below is a breakdown of those reports along with a brief description.

DELINQUENTS LIST (F-B)

This will display the names and status of all delinquent tenants.

At the top of the report is a summary of all delinquent units and the total amounts of money owed. The delinquent tenants are then printed out in order of the date they are paid up to, with the most delinquent tenant at the top. It will display the unit number, size, Paid-to-Date, last name, phone number, total owed, and what action, if any, has already been taken. You will notice that in the "Action" column there are abbreviations that stand for the different actions that have been taken.

DELINQUENT RENTS LIST – AUCTION PLANNING (F-B-1)

Similar to the F-B report, it shows total owed along with last paid dates.

ACTIONS NEEDED (F-A)

This report lists each unit needing a delinquency action. In unit order, the name, paid-to-date, action needed, last action, amount owed and last paid date are shown. Following that are totals of the actions needed, and totals of each type of action needed.

WHEN WILL DELINQUENCY ACTIONS SHOW UP ON THE ACTIONS NEEDED (F-A) REPORT?

The *"Actions Needed"* report shows you what actions need to happen when, based on your Delinquency settings. The F-A report looks like this:

Report on Delinquent Actions Needed (F-A)
QuikStor Security & Software.....Since 1987, Van Nuys
Compiled on January 22, 2010 at 11:56 AM

UNIT	SIZE	NAME	PAID TO	ACTION NEEDED	LAST ACT.	SENT ON	BALANCE	LAST PAID
11	5 x 5	Calderon	01/01/10	First Late Charge			76.65	12/29/09
22	10 x 20	Akopyan	12/01/09	First Late Notice	1LC	12/30/2009	325.00	
26	10 x 10	Levitt	12/01/09	First Late Notice	1LC	12/30/2009	209.50	

There are 3 action(s) needed.
They are broken down as follows:

1 First Late Charge	1LC	7	0
0 Second Late Charge	2LC	1	0
0 Third Late Charge	3LC	1	0
2 First Late Notice	1LN	7	0
0 Second Late Notice	2LN	1	0
0 Third Late Notice	3LN	0	0
0 Pre-Lien Notice	1CERT	45	15
0 Lien Sale Notice	2CERT	60	15
0 Cut Lock	CUTLK	82	0
0 Advertising	ADV	100	0

Following Units were already Advertised:

To determine when items will show up on the above report, go to **Tools** -> **Support** -> **Print Delinquency Settings**. This will print a report that looks similar to this:

Active Delinquency Settings
QuikStor Security & Software.....Since 1987
Compiled on January 22, 2010 at 12:02 PM

Settings Last Modified on 12/2/2009 at 5:55 PM

Notice	Days	Amount	Flat Rate	Percent	Expires	Required	Send to Alternate	Print	Min. Amt	Max. Amt	Recuring
First Late Charge	7	10.00	Y					N/A			Y
First Late Notice	7		Y					Y			
Pre-Lien Notice	45	15.00	Y		15	Y	Y	Y			
Lien Sale Notice		30.00	Y		15	Y	Y	Y			
Cut Lock		25.00	Y					N/A			
Advertising		50.00	Y					N/A			

This report shows you your delinquency settings. Each step in the Actions Needed report shows what is due, but has not yet been done. So in this case, if for some reason the First Late Notice was not printed for a unit during overnight processing, but it is more than 7 days past the paid-to-date (note the 7 in the Days column after First Late Notice), the F-A will show a First Late Notice for that unit. Pre-Lien is calculated the same way – in this case, 45 days after a tenant's paid-to-date, assuming the Pre-Lien hasn't been processed, that will show up on the F-A.

Lien Sales are due when the Pre-Lien expires. In this case, the Pre-Lien expires after 15 days (the 15 is listed in the "Expires" column), so adding that to the amount of time for the Pre-Lien to become due, which is 45, you can see that the Lien Sale Notice will be due on the 60th day after a tenant's paid-to-date.

Advertising fees are due after the Lien Sale expires. Again, the "Expires" column shows that the Lien Sale expires after 15 days – so adding 15 to the 60 we had from the step above, we see that Advertising is due on the 75th day after a tenant's paid-to-date.

Each step will be shown on the F-A ONLY when the previous step is completed. So if a tenant is 60 days past their paid-to-date, but they haven't yet received a First Late Notice, that will be all the F-A shows.

To change any of these numbers, go to **File** -> **Delinquency Setup** and adjust them for each applicable fee and notice.

NOTICES SENT (F-C)

This report shows all the delinquency notices that have been sent out during a given time period. The report will show you the date the action was taken, unit number, tenant's last name, type of action, date the action expires, what the customer's paid-to-date is, and the balance owed.

LATE CHARGES - BY UNIT OR LAST NAME (E-R-N1)

.
Tenants should pay for fees before rent, but there may be cases when you allow them to pay for rent first. You will want to run this report periodically to discover who is current in rent, but still has outstanding balances in other fees. You may display tenants in unit order or alphabetically by last name. The unit number, tenant's name, paid-to-date, late fees, other fees, and balance will display.

RED LOCKS TO PUT ON (E-Y-R)

This report allows you to print the list of red locks to put on for the day. Usually this report prints during overnight processing. However, if you have misplaced it or need another copy, you may use this report. Listed on this report are all units that have become late and should be over locked. The information provided by this report includes the unit number, type, rent, tenant, paid-to-date, balance, height, floor, inside or outside access, and door type.

RED LOCKS TO TAKE OFF (E-Y-J)

This report provides a list of red locks that need to be taken off. The tenant's current paid-to-date, balance owed, and a description of their unit are included.

CURRENT BUT OWED FEES (E-R-N)

Tenants should pay for fees before rent, but there may be cases when you allow them to pay for rent first. You will want to run this report periodically to discover who is current in rent, but still has outstanding balances in other fees. You may display tenants in unit order or alphabetically by last name. The unit number, tenant's name, paid-to-date, late fees, other fees, and balance will display.
At the bottom of the report will be the total for the number of units, and the total of each category of fee owed.

COLLECTION LOG (E-R-Z)

This report gives you a list of customers who are currently delinquent, listed by unit. Also provided for each unit is the size, paid to date, name of the tenant, phone number, and the amounts owed in rent, late fees, any credits, and other charges. The final two columns are the total amount owed, and the most recent action posted to the account. Below each delinquent tenant, four date lines are printed, in order to keep track of when this tenant was notified or reminded of their delinquency.

FRIENDLY REMINDER CALLSHEET (E-K)

This sheet provides you with delinquent tenant information that you can use as a reminder callsheet. There are date spaces available so that you can write in the dates that you call the delinquent tenant.

ADDRESSES FOR CERTIFIED NOTICES SENT (E-Y-Z)

This report provides you a list of tenant addresses that had notices sent within a specified date range. This is sorted by date, and provides the columns of unit, action, name, address, city, state, zip, and number.

ADDRESSES FOR NOTICES SENT WITH A CERTIFICATE OF MAILING (E-Y-Z-1)

This is a form that will list all delinquent tenants (and alternates) that should get a late notice that can be sent with a Certificate of Mailing versus certified mail.

LATE CHARGES WAIVED REPORT (L-C-W)

This report shows you a list of all tenants that are setup to have late charges waived

Billing

This section contains reports that concerning the billing for your site. Below is a breakdown of each report and a brief description of each.

UPCOMING BILLS TO BE SENT - BY UNIT, PAID-TO-DATE OR LAST NAME(E-L-K)

Generates a list of all upcoming bills – can be sorted by unit, paid-to-date, or last name.

BILLS SENT FOR ANY TIME PERIOD (E-L-M)

This report generates a list of bills sent for a specified date range. The report will display the date, unit, name and current paid-to-date of the tenant.

BILLING STATUS - BY UNIT OR NAME (E-L-A)

This report shows the billing status of all tenants. The report displays unit, last name, billing status, whether the bill is printed, e-mailed or both, paid-to-date, next bill date, rent, and tenant's current balance.

Tenant

This section contains reports concerning the tenants at your facility. Below is a breakdown of those reports and a brief description of each.

MASTER LIST OF ALL TENANTS (E-J)

When you select this report, a sort order menu will display, including a checkbox on whether or not to include vacant units. Once the sort order is selected, this provides a complete list of all tenants.

MASTER LIST OF ALL TENANTS – BY UNIT TYPE (E-J-1)

Same report as the E-J sorted by unit type

TENANTS ACCOUNT BALANCE REPORT (E-J-2)

This report shows a balance report for each of your tenants

MONTHLY CHARGES FOR ALL TENANTS (E-R-P)

This report will list all of the monthly charges in the order you specify – unit, last name, or paid-to-date. The report will list both the charge amount and the running totals.

MONTHLY CHARGES FOR A GIVEN TIME PERIOD (E-R-Q)

This report will list all of the monthly charges for the time-period you specify. All the various categories will have a total at the end of the report.

LIST OF TENANTS WHO MOVED OUT (E-L-H)

This report will print in unit order, including full name, customer number, date moved out, date moved in, number of days occupied and the balance owed.

LIST OF ALL TENANTS WHO HAVE PREPAID (E-Y-Q)

This report lists each tenant who has paid rent beyond the current month. Printed on this report are the unit number, tenant's name, paid-to-date, and how much rent was paid for the next four months and beyond.

LIST OF ALL TENANTS WHO HAVE PREPAID ACTUAL (E-Y-Q-3)

This report is only available for sites that are setup as Strict First of the Month. This report lists each tenant who has paid rent beyond the current month. This shows the actual rent amount that they are ahead. Printed on this report are the unit number, tenant's name, paid-to-date, and how much rent was paid for the next four months and beyond. At the bottom it provides a total for each column, and then a grand total of prepaid rent.

LINKED UNITS (E-Y-P)

This report lists all of the linked units in your system. You may have linked units because you have rented more than one unit to the same tenant. Displayed on this report are the unit number, tenant's last name, and which units are linked.

TENANTS GETTING A RENT CHANGE (E-L-P)

This report will show all upcoming monthly rent changes by unit number or last name. Columns included are unit number, unit type, last name, paid-to-date, rent raise date, current monthly rent, new monthly rent effective on the rent raise date, and the change in rent (the difference between the current and new rent). Totals at the bottom of the report include the number of occupied units, the units to be raised, and the total increase or decrease in rent.

ESCROW LIST OF ALL TENANTS (E-Y-L)

This list displays, in unit order, all of your current tenants and how much they owe or are owed. The list provides the unit, size, name of the tenant, paid-to-date, monthly rent, and current debit or current credit. The totals for debit and credit are at the bottom of the report.

FUTURE RENT INCOME (F-R-I)

This report shows you the current rent and any increases or decreases to the future monthly rental income.

LIST OF TENANTS A MANAGER WOULD LEAST LIKELY RENT TO AGAIN (D-L-R)

If you have had tenants that were problematic in the past, this report will show you which tenants they are including any monies still owed, NSFs, certified notices, and move-out date. This list is populated if a former tenant meets one of three criteria: 1) their balance is higher than their rent, they have three or more NSF checks, or a certified notice was applied.

TENANT EMAIL ADDRESS (T-E-A)

This report shows a list of not only all of the tenant's email addresses, but shows other common contact information including home phone, work phone, and cell phone. You can also view former tenant email addresses

Inventory

This section provides reports dealing with your inventory. Below is a breakdown of the various reports it contains with a brief description of each.

CURRENT INVENTORY (E-Y-M)

This report lists the current items held in inventory, how many are in stock, and any notes made in reference to each.

INVENTORY TRANSACTIONS - BY TIME OR ITEM (E-Y-N) & (E-Y-O)

This report lists all transactions for inventory, whether payments or direct changes to the amount of stock on hand. You choose the date range for the report. The columns of information printed are the transaction date, unit number or inventory change, tenant's name, sales tax, and the inventory item.

QUARTERLY INVENTORY SALES (Q-I-S)

This report provides you with a quarterly breakdown for the year of all of your inventory sales. The information and the quarterly time period is based off of what you select as your start date. This report provides you with the starting and ending dates of each quarter, the inventory sales, sales tax, total for that quarter, and then on the bottom of the report is a total of the inventory sales for the year.

INVENTORY ITEMS TOTALED BY ITEM (F-R-E-D)

This report shows a breakdown, but item, of stock and transaction involving each item. It then totals per item.

Exceptions

This category provides a breakdown of exceptions in rent that you may have at your site. Below is a list of the various reports and a brief description.

FREE RENT (E-R-K)

This report details any free rent provided, in date order, for a specified time period. The report includes the unit, tenant name, days of free rent, and the amount of free rent.

TENANTS PAYING LESS THAN SCHEDULED (E-V)

This report will produce a list of tenants paying less than your current scheduled rent. In unit order, the type of unit, location of unit, door type, floor, scheduled rent, last name, tenant's current rent, amount under schedule and date of last rent raise are displayed. Following are the totals for scheduled rent, current rent and amount under scheduled rent.

TENANTS PAYING LESS THAN SCHEDULED BY UNIT TYPE (E-V-1)

This report will produce a list of tenants paying less than your current scheduled rent. In order by unit type this report gives you the columns of unit, the type of unit, location of unit, door type, floor, scheduled rent, last name, tenant's current rent, amount under schedule and date of last rent raise are displayed. Following are the totals for scheduled rent, current rent and amount under scheduled rent.

TENANTS PAYING MORE THAN SCHEDULED (E-Y-1)

This report will produce a list of tenants paying more than your current scheduled rent. In unit order, the type of unit, location of unit, door type, floor, scheduled rent, last name, tenant's current rent, amount over schedule and date of last rent raise are displayed. Following are the totals for scheduled rent, current rent and amount over scheduled rent.

TENANTS NOT DUE ON THE 1ST (E-L-I)

This report will display, in unit order, a list of tenants not due on the first of the month. Information includes unit size, last name, paid-to-date, rent, security deposit and balance due.

RENT CHANGES (E-1)

This report will print in unit order a list of the tenants who have not received a rent raise up until a specified end date. Information displayed includes unit, name, size, last raise, rent, prior rent, raise, move-in date, paid-to-date, last action, and balance. This report can be printed in landscape view for easier auditing.

MANAGER ACTIVITY (E-Y-A)

This report lists all manager discretion for a specified time period. The report, in date order, will display the following information - unit number, credit or debits of rent, credit or debit of late charges or other fees, total money debited or credited and the reason for the discretion.

REPORT ON ALL REFUNDS (R-E-F)

This report will provide you a list of all refunds that have occurred within a specified date range. This report provides you, in date order, a list of the units, name/description, receipt, total, rent, other, prior paid-to-date, current paid-to-date, balance and type (refund).

FREE RENT AUDIT (E-R-K-A)

Similar to the E-R-K (Free Rent Report), this report provides an audit on free rent given.

LIABILITIES DETAIL REPORT (L-D-R)

This report provides a detailed list of your liabilities

LIST OF ALL TENANTS WITH NSF CHECKS (E-N-F)

This report provides a list of any tenants that have given your facility an NSF check. The report includes the tenant name, number of NSF checks given, NSF amounts, and associated NSF charges.

Operations

This category contains reports having to do with the operations of your site. Below is a breakdown of each report.

FACILITY SUMMARY REPORT (F-S-R)

This report provides all of the most important day-to-day information about your site in a simple one page report. You can specify a date range and see a complete breakdown of all collections by payment type (cash, check, CC) and payment category (Rent, Late Fees, Inventory, etc.). You can also see how many units were rented/vacated, current outstanding collections, credit/free rent given.

ACTUAL DEPOSITS (E-R-Y)

This report lists all actual deposits for a specified time period, categorized into cash, check, and credit card totals.

BANK DEPOSIT BY CREDIT CARD TYPE (E-R-Y-2)

Displays a breakdown of transactions that were deposited in the bank by credit card type.

ANALYSIS OF LENGTH OF OCCUPANCY (E-L-G)

This report provides an analysis of how long current and former tenants have stayed at your facility. It provides totals for each and categorizes them from less than a month to more than three years.

REPORT ON NOTES (E-W)

This report will print out all of your daily notes for a specified time period.

FACILITY REVIEW / WALK-AROUND FORM (E-Y-W)

This is a form that you can use when performing a physical walk around of your facility.

LIST OF ALL UNITS (E-Y-G)

This report will print a list of all units, in unit order; include the size, height, floor, location, and door type.

AMOUNTS OWED (E-R-D)

This report will tally all the rent, late charges, other charges, credits owed and the total owed. Following that will be a total of all the currently held security deposits.

LENGTH OF OCCUPANCY (L-O-C)

Similar to the E-L-G report, this provides a summary of your occupancy duration with further categorization for given months.

WAITING LIST (W-L-R)

This report provides a list of customers who are currently waiting for a unit of a certain size to become vacant. In addition to the person's name, this report will also list their home phone number, work phone, date they came in, date they need the unit by, and the minimum & maximum sizes they will rent.

PHONE CALL LIST (E-F-H)

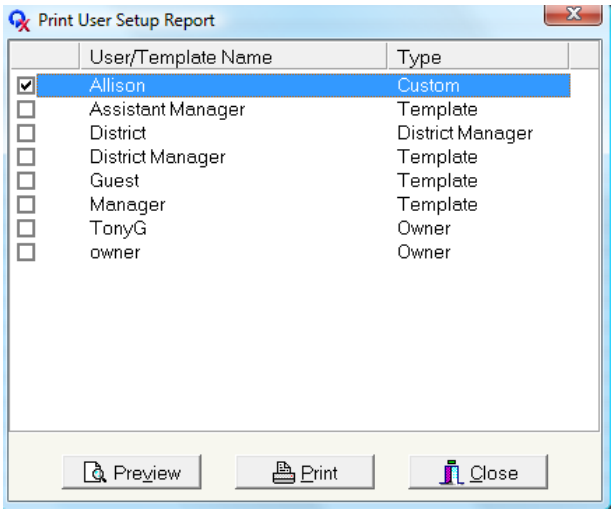
This report will print the current list in the Phone Calls list menu.

SITE NOTES FROM CALENDAR (S-N-C)

This report will print any notes that you have entered into the calendar, as well as any debits, credits, paid-to changes, or voided payments during that time.

USER SETUP REPORT (U-S-R)

You can select a specific user or group from the list and then preview or print all of the user settings for them



TRUCKS USED DURING A MOVE-IN (M-T-U)

This report tracks if a truck was used as part of the move-in process. For example, if your facility offered a free truck as part of the move-in incentive, you can mark Yes or No in the move-in form (under the Miscellaneous tab" as to whether or not a truck was used. The data is shown in this report to see how effective your truck promotion actually is. On this report you will find the date, unit number, size, tenant name, profile, source, and status.

Monthly Charges

This category contains all of the reports dealing with the monthly charges acquired for your site.

INSURANCE ACTIVITY REPORT (E-Y-K)

This report is only used if you collect insurance from your tenants and have an Insurance module activated in Express. This is an insurance statement that you can provide for a tenant of premiums paid.

INSURANCE ACTIVITY REPORT FOR A DATE RANGE (E-Y-K-1)

This report contains all of the same information as the Insurance Activity Report. The only difference is when you click on this report, you can enter in a date range.

INSURANCE ACTIVITY REPORT (E-Y-K-2)

The report shows all transactions for insurance made for the time period you select. Included at the bottom of the report are totals for amounts collected and tenants currently paying for insurance coverage

TOTAL MONTHLY CHARGES (E-R-W)

This report gives you an itemized listing of your monthly charges, and the revenue generated by these charges during a given time period. It also provides you with the average monthly income from these charges.

DETAILS ON MONTHLY CHARGES (E-R-W-1)

This report will show you information for all of the monthly charges tenants have incurred for the selected date range. This report is separated by each specific monthly charge that your site has setup, which then gives you a list in date order of these charges.

Gate Activities

This category provides you reports on gate and alarm activity at your facility. Below is a list of the various types of reports and a brief description about each of them.

PLEASE NOTE 

activity will only be displayed in Express if you are using a QuikStor access control system, such as the Guardian Series. All other gate integrations are one-way and no feedback is provided by the gate system to Express. Because of that, these reports only apply to QuikStor gate integrations.

LIST OF ALL GATE CODES (E-Y-S)

This report will print all tenant gate codes. When you select this report, the option comes up to print the list with or without occupied units that have no keycodes. You may sort it by unit, name, keycode, or keycode zone.

LIST OF GATE CODES FOR A SELECTED UNIT (E-Y-Y)

This report will print all gate codes for a selected unit

GATE ACTIVITY (E-Y-C)

This report provides you all gate and wireless door alarm activity for the selected time period. The report is sorted by date order and includes the following columns unit number, tenant's last name, admittance check, date, time of attempt, and the which keypad the the code was used at. At the bottom there is a summary showing total attempts made, admitted, exits, denied, and unknown.

GATE ACTIVITY FOR UNIT (E-Y-E)

Select a tenant from your unit list on the main screen. The report will display activity for the selected tenant only.

Marketing Reports

For a complete review of marketing graphs and reports, please see the **Marketing section** earlier in this manual.

Make a Bank Deposit (E-M)

Use this to print a bank deposit at the end of each day, which you may take to the bank the following day. Prior to printing this report, you may wish to print a Trial Bank Deposit to verify that your deposits match your collections. The trial report may be run any number of times, but when the real bank deposit is run, it cannot be run again. The reason for this is that after running the bank deposit, a marker is set in the deposit record so that all transactions from this point until the next bank deposit are included on that next bank deposit.

All the cash, checks and credit card income that have been collected will appear on this deposit. Make sure the printer is ready when you select this report. More than one copy may be set to print, so you can keep one or more for your records.

You can always print another copy later of the bank deposit by going to Browse Data -> Bank Deposits, and clicking the Preview Bank Deposit Report button.

Frequently Asked Questions

HOW TO SEARCH

Finding information quickly is crucial to running an efficient business. In Express there are various tools and windows that allow you to quickly sort or search for the data you need.

For the purposes of this example, let's say that we want to find all tenants that were charged an ADMIN FEE.

Go to Browse Data -> Payments

A window will come up that looks like this:

CREDIT CARD TYPE	RENT	RENT TAX	INS	LATE	LIEN FEE	CUTLOCK	ADVERTISE	ADMIN FEE	INVENT
	$73.00	$3.65	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$95.00	$4.75	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$95.00	$4.75	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$50.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$15.00	$0.
	$90.03	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$15.00	$0.
	$73.00	$3.65	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$73.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$73.00	$3.65	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
	$95.00	$4.75	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.

There are two quick and easy ways to find the information you seek:

1. **Search Field** – use the search fields at the top of the box to quickly select the column of information you are looking for. Then, if you know the value, enter that in the box on the right. For our example, I selected ADMIN FEE and the value of $15.00. You will see that the program took me to the appropriate column and the first value matching my search criteria. You may click the *Find Next* button until you find the exact record you are looking for.
2. **Column Sort** – you can click any column heading and that will sort the data by that column. So in our example we are searching under ADMIN FEE to see which tenants were charged. When you click the column header it will sorted the lowest to the highest amounts.

You can use this process on any of the Browse windows to find the information that you are looking for.

WHAT'S THE DIFFERENCE BETWEEN A STATEMENT AND A BILL?

A statement is a snapshot in time of that account. It shows exactly where the account is at the moment it is calculated. If you want to know how much is owed *at this moment*, you want a statement. In Express, you would want to use the Complete Tenant Report (E-I), which can be found at Reports -> Tenant. This serves the same function as a traditional statement – showing not only a snapshot of where the account is at this moment, but also how it got there.

A bill shows how much the tenant *will* owe the next time rent is accrued. You send a bill in advance of the rent being due, so the tenant knows how much to pay and when to pay it. As that is the case, the rent shown on a bill will always be for a date range AFTER the date it is being printed, as well as after the tenant's Paid-to-Date.

I RECEIVED A MESSAGE ABOUT BACKDATING. WHAT DO I DO?

If you receive the message below it means that your computer date has been changed to a point in the past. Either the date was set forward and you just fixed it, or it was set correctly and you just moved it back. In both cases you will receive the following message:

Express is designed to protect against backdating, as it causes major database integrity errors. If you received the above error, you should:

- Move the computer date to today's date, or
- Keep the computer date as today, restore your database to the backup made on what the computer thought was today's date, and re-enter all transactions and changes made in the database between the date that the computer thought was today (probably yesterday or the day before) through current.

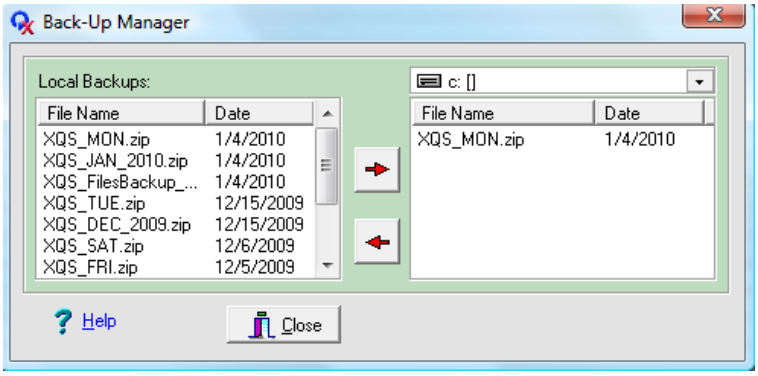
For example, if today is August 23 and you discover that the computer thinks it's August 24, you will need to fix the computer date, restore the database to the one made on "August 23," (which is actually August 22)

and put in all the transactions that happened between the time the backup was made on August 22 and right now.

HOW DO I TRANSFER MY QUIKSTOR EXPRESS DATA TO ANOTHER COMPUTER?

The first step is to backup your dataset from the current computer so that it can be moved to your new computer data off the first computer.

Go to **File** -> **Backup Database**. Express will tell you that the database has been successfully backed up. Then go to **File** -> **Backup Manager**. The Backup Manager will look like this:



Under "Local Backups", look for the file associated with today's date. Click on the down arrow ( ) next to C: and select the disk drive you wish to send the backup to. Click on the right arrow button ( ) and it will send the backup to that drive.

The second step is to copy your data from the back-up drive to your new computer. The process is essentially the same, but in reverse.

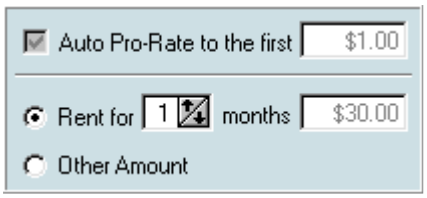
It is highly recommended to install the same version of Express on the new computer that you are currently running on the old one. You can then update, if desired, after the data transfer has been successfully completed.

Go to **File** -> **Backup Manager** and choose the drive where you data is located. Select the backup and click the left arrow button ( ). Express will copy the backup onto your new hard drive.

Go to **File** -> **Restore Database**, select the same backup you just copied and click Restore. When this is finished, close Express. When you open it again, you may need to run overnight processing. Once that is complete you are done with your data transfer!

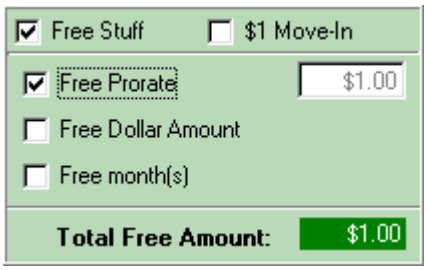
WHY DOES EXPRESS AUTO PRO-RATE AT THE END OF THE MONTH?

Whether you are an Anniversary Site, a Strict 1st of the Month Site, or a Partial Payment site, you will find that move-ins require a Pro-Rate on the 29th, 30th, or 31st of the month. This is because not all months *have* a 29th, 30th, or 31st, and having a Paid-to-Date (PTD) on that date makes paying one month's rent a tricky process. If my PTD is January 30, for example, and I pay for one month, what will my new PTD be? There is no February 30. So rather than complicating the process with moving Paid-to-Dates, Express will force a pro-rate to the 1st of the month on move-ins for those dates.



Note that the option to undo the Auto Pro-Rate is not selectable during these dates during a move-in.

If you wish to waive the pro-rate fee for a tenant, just put a checkbox in the “Free Stuff” and “Free Prorate” boxes. Note that the Paid-to-Date will still be the first of the upcoming month – doing this is essentially giving them however many days remain of the current month free.



PRINT SCREEN IN WINDOWS

They say a picture is worth a thousand words. If you have a question for QuikStor Technical Support, providing a “screenshot” of what you are seeing on your screen can be invaluable and streamline the support process. The easiest way to do this is to perform the “Print Screen” function in Windows.

Each version of Windows is a little different, but all keyboards have a “Print Screen” button that when pressed will capture the current image(s) on your computer screen.

Next, open the “Paint” program on your computer and paste the captured screenshot into the program by holding the <CTRL> key and pressing the ‘V’ key. You can also go to Edit -> Paste in the Paint program.

You can then save the image in .jpg format and email it directly to the QuikStor Support Technician that you are already working with, or to support@quikstor.com.

Please keep in mind that this is a Windows function, it is not a QuikStor function. If for any reason this does not work properly you will need to contact your computer vendor or Microsoft directly for assistance.

Still have questions? Call us!

QuikStor Technical Support Department
1.800.321.1987 Support Line
1.818.501.5785 FAX
Support @quikstor.com

Glossary Of Terms

Actions	Shortened term for late actions.
Alternate	Additional contact person filed in a tenant's records.
Anniversary Site	This means that a tenant's paid-to-date is the anniversary of the date that they moved in on. An anniversary does not force a pro-rate on move in, but it does not accept partial month's payments either.
Auto Credit Card Billing	This allows you to be able to have a tenant's credit card automatically charged for their monthly rent during the overnight processing.
Backup	Procedure used to compile data into a single file onto the hard drive and/or external storage media. Having a backup of your data is crucial in case of hardware failure!
Bills	Another word for invoices. Used to notify tenants when their rent is due. Not to be confused with Statements.
Card swipe	Any card with a magnetic strip used to gain access through a gate (QuikStor Access Control Systems only). You can also swipe credit cards to make payments in the office or a driver's license (if your state supports magnetic stripes) to easily copy tenant information into Express.
Certified Letters	Delinquency notices (normally lien sale notices) requiring a certified signature upon delivery to tenants in severe delinquency status. Pre-liens are considered certified in some states, so for simplicity, QuikStor considers them to be certified. Initial and secondary late notices are not considered for this category. Express will not print certified letters during overnight processing on Saturday or Sunday.
Credit (manager deposit)	Used to record monies added to the cash drawer in non-traditional means. Also recorded on the bank deposit.
Credit (tenant)	Applies specified credit amount to a specified category.
Database	Term specifies the file that contains all of the data for your site that has been input into the QuikStor Express program.
Debit (manager deposit)	Used to record monies removed from the cash drawer in non-traditional means. Also recorded on the bank deposit.
Debit (tenant)	Applies specified debit amount to a specified category.
Delinquent	A delinquent account is a receivable for which payment has not been received by the due date. In the case of Express, this means that if a tenant's paid-to-date has passed and they have not paid their rent, they are considered delinquent.
Export	Process of sending data from one program to another.
Future free rent	Rent credit applied for a selected tenant on a future date as specified.
Gate code	Same as a keycode. A numerical sequence of numbers (no greater than nine

digits) entered on a numerical gate keypad to gain access to a facility.

Gate Hours Refers to the Hours of operation that your gate will allow access.

Inventory Merchandise items on hand.

Invoices Another word for bills. Used to notify tenants when their rent is due. Not to be confused with Statements.

Keycode Same as a keycode. A numerical sequence of numbers (no greater than nine digits) entered on a numerical gate keypad to gain access to a facility.

Late charges Group of delinquency charges consisting of charge type "lc." Certified delinquency charges are not considered late charges (see *other charges*).

Linked units Associates multiple occupied units for concurrent tracking of payment, delinquency, and billing processes.

Monthly charges Recurring charges as applied to a tenant(s) account appearing on their monthly bill. Rent tax is considered a monthly charge (although rent itself is *not* a monthly charge).

Non-standard payment Used to post a partial payment. This also specifies any payment made that is applied to specific categories, other than rent.

Non-Tenant Purchase A purchase of inventory or other charges by someone other than a tenant at your site.

Notices Term for all delinquency notices. Billing/invoices are not considered to be notices.

Other charges Group of charges consisting of certified/delinquency, NSF, and manually added.

Overnight processing Automatic daily procedure run by QuikStor Express that processes maintenance routines, program functions, and updates data records.

Paid-to-Date This is the date that a tenant's rent is next due. The important thing to note is that the tenant has not yet paid for their paid-to-date. Meaning if someone is paid to 12/1/10, they have not yet paid for 12/1 so they must pay for 12/1 when they come in. This is the key difference between a Paid-to-Date and a Paid-Through-Date.

Partial Payments Implies payments made by tenants at your site, towards their amount due, that is not the entire amount of the outstanding balance.

Partial Payment Site A site that accepts partial month's payments. New tenants may or may not be pro-rated to the 1st of the month.

Pay-at-the-gate (PATG) Included with the QuikPay credit card module allowing delinquent tenants to pay their outstanding balance at the entry gate keypad using their credit card (QuikStor Access System Only).

Profile Security identification specifying which menu options are accessible for a program user.

QuikPay Add on module allowing instant processing of credit card payments. Tenants

	with auto credit card billing enabled have their credit card account automatically debited each month during overnight processing. This feature is included with Express Professional and is optional in Standard. QuikPay is not available with Express Lite.
Receipt	Printed when a payment is applied. Shows the amount of the transaction that just took place..
Recurring	Delinquency setting, if made active, posts the associated action's late charge each month a tenant remains delinquent until the past due balance is paid.
Red Lock	Delinquency status indicating placement of a company lock on a unit to prevent tenant entry until past due balance is paid.
Restore	Procedure used to reload a data backup. Note that this overwrites current data!
Scheduled rent	Standard rent rate for a specific size/unit type.
Selected unit window	Provides detailed information for a selected unit from the unit-listing window.
Skip tenant	Delinquent tenant who vacated their unit without prior notification to the facility manager.
Source	Marketing category used to identify how tenants heard about the facility.
Statement	Used to show the current amount owed on a customer's account. Not to be confused with bills or invoices.
Strict First of the Month Site	Implies that all tenants at your site are due on the first of every month. A Strict First of the Month Site requires pro-rates to the 1st of the month during a move-in, and does not accept partial payments.
Tail Lock	Refers to a tenant who has been locked inside the facility because they did not enter their gate code at the entrance keypad. You enable this to educate tenants to always enter their gate code and force them to see the manager when they don't.
Transfer	Process of moving an active tenant from one unit to another.
Under schedule	Monthly rent rates for tenants who are below the scheduled (standard) rent rate for their units' associated size.
Unit listing window	Displays all units for a specified sort type.
Unit Types	User defined specification for a set group of units. (e.g. 5 x 5, 10 x 10, etc.)
User	Individual security account containing corresponding name, password, security level, and profile. The currently active user is displayed on the program title bar.
Variable	Pre-defined data source that inserts the associated value or text into a selected notice/letter automatically. Variables are indicated by surrounding [[ ]] bracket symbols while in the word processing edit window.
Walk-around	Inspection of all units on a facility.

INDEX

A

Actions Needed 199
When will delinquency actions show u p on the Actions Needed Report? 199
Activating QuikStor Options 68
Actual Deposits.....205, 206
Addresses For Certified Notices Sent 201
Advertising.....161
Amounts Owed 206
Apply Cut Lock/Advertising/Late Charges 161
Archive Database.....179
Archive Data 180
Extract Archive.....180
Assign Categories..... 32
Auto CC Billing Without QuikPay 83
Auto Prorate to End of Month.....211

B

Backdating Error Message.....210
Backup.....166
Names 164
Backup Database.....163
Sending A Backup To QuikStor.....163
Backup Manager.....165
Backup Non Database Files.....166
Bank Deposit 159, 209
Billing Setup..... 67
Billing Status.....202
Bills Sent For Any Time Period 202
Browse Data.....169
All Transactions 169
Bank Deposits Made.....169
Former Tenants 170
Payments.....169
Phone Calls.....171
Vacancy.....170
Waiting List 170

C

Calendar.....172
California Law Late Charge Setup 63
Card Ready..... 80
Cash Collection Detail.....191
Categories 32
Change Info 151
Change Paid To.....150
Change Payment Method 147
Change Selected Units Type 157
Check Verification.....120
City Analysis 182, 183

Collection Detail 191
Collection Detail Report 191
Collection Log 201
Collection/Deposit 191
Collections Since The 1st 192
Credit Card Processing 80
Credit Cards To Be Charged For A Date Range 202
Current But Owed Fees Report 201
Current Inventory 203
Custom Labels 153
Custom Letter 154
Cut Lock 161

D

Daily Analysis 191
Daily Report 190
Damaged Units 159
Damaged/Reserved Units 198
Data Entry 19
  What To Do After Final Processing 22
Delinquency Setup 35
  Late Charges Max 36
Delinquent History 156
Delinquent Tenant Move-Out With Balance 145
Delinquent Tenant Transfer 127
Delinquents List 199
Demographics Report 183, 184
Destinations Setup 66

E

Email 174
  How To Email Bills, Notices And Receipts 174
  Why Didn't My Express E-Mail Process During Overnights? 175
Emailing Receipts 121
Escrow List Of All Tenants 203
Expected Move Outs 142
Expected Move-Outs 196
Express Gate 102
  Gate Functions i nQuikStor Express 103
  Gate Setup 103
  On Site List 105
  Reports 104
Extract Archive 180

F

Facility Review/Walk Around Form 206
Former Tenant Payment 125
Free Rent 204
Free Rent To Existing Tenants 121
Frequently Asked Questions 209
  Backdating Error Message 210

How Do I Get My Express Data To Another Computer?....211
How To Search 209
What's The Difference Between A Statement And A Bill? 210
Why Does QSX Auto Pro Rate At The End Of Month?....211

G

Gate Activity....208
Gate Activity For Unit 208
Gate Setup....103
Gates
Express Gate 102
Third Party 106
GETTING STARTED 16
Knowing Your Way Around QSX 72
What To Do After Final Processing 22
Glossary Of Terms....214
Graphs....181
Tenant Sources Graph....181
Unit Efficiency Report Graph 181

H

How To Get Help
Help Videos.... 71
On Screen Help 72
How To Search 209
How to Send A Backup To QuikStor 163
How To Set Tenant For Auto Credit Card Billing 82
How To Waive Or Remove Unwanted Fees....162

I

Installing QuikStor Express From The Install CD 18
Insurance....115, 151
Insurance Is Always Paid With Rent....136
Insurance Setup....134
Send All Pre and Cancel Letters 151
Send Pre-Cancel Letter....151
Start/Cancel Insurance....136
Insurance Activity Report 207
Insurance Activity Report For A Date Range....207
Internet Setup 57
Where do I find my info? 63
Inventory Purchase....157
Inventory Setup.... 64
Inventory Transactions....204
Invoices 152

K

Key Codes
Upload All Key Codes 173
Knowing Your Way Around QSX 72

L

Labels 153
Late Charges 36, 161
Late Charges-By Unit or Last Name 200
Late Notices 152
  Customize 176
Letter 154
Liens
  Customize 176
  Printing 152
Link/Unlink 129
Linked Unit Payment 123
Linked Units 203
List Of All Gate Codes 208
List Of All Tenants Who Have Prepaid 202
List Of All Tenants Who Have Prepaid Actual 202
List Of All The Units 206
List Of Reserved Units 198
List Of Tenants Who Moved Out 202
List Of The Gate Codes For Unit 208

M

Make A Different Payment 119
Make A Different Payment With Credit 122
Manager Activity 205
Manager Daily Debit/Credit 160
  Allocate Credit/Debit 160
Mark Unit Damaged/Undamaged 159
Marketing 181
  City Analysis 182, 183
  Demographics Report 183, 184
  Miles From Site 183
  Profile Breakdown 182
  Zip Code Analysis 183
Marketing Tenant Sources 183
Master List of All Tenants 202
Miles From Site 183
Month End Analysis 191
Monthly Charges 114, 130
  Rent Tax 132
Monthly Charges For A Given Time Period 202
Monthly Charges For All Tenants 202
Monthly Rent 114
Move Out
  Transfer Credit To Linked Unit 145
Move-In 111
  Financial Details 114
  How To Do A $0 Move-In 116
  Rent Payment 115
  Tenant Details 111

Move-In & Move-Out Analysis....196, 197
Move-In Analysis....196
Move-Out....144
Delinquent Tenant With Balance....145
How To Prorate A Move-Out....144

N

Names Of Backups....164
Non Tenant Purchase....157
Notes....142
Notices Sent....200
NSF Check....147
NSF Receipt Shows Less Than Tenant Was Charged....148

O

On Site List....105
Outbox....173
Overnight Processing....168
Overnight Report Scheduling....100

P

Payment....119
Choose Payment Method....115, 120
Former Tenant Payment....125
Free Rent To Existing Tenants....121
Linked Unit Payment....123
Make A Different Payment....119
Make A Different Payment With Credit....122
Payment History....156
Percentage Of Income By Cash, Check And Cards....192
Phone Call List....206
Phone Calls....171
Plug N' Pay....80
Post All Rents....163
Practice Tasks....78
Print All Bills....161
Print All Notices....161
Print Bill For Tenant....152
Print Notice For Tenant....152
Print Screen In Windows....212
Profile And Source Defaults....65
Profile Breakdown....182
Profile List....30
Prorate A Move Out....144

Q

Quarterly Inventory Sales....204
QuickBooks....79
QuikPay
How To Set Tenant For Auto CC Billing....82
QuikPay Direct....80

QuikPhoto 91
QuikStor Data Entry 19

R

Raise/Lower Rents 139
Change Rent For Individual Unit 139
Change Rent For Unit Type 140
Change Scheduled Rent 140, 141
During Move In 114
Return Scheduled Rent 142
Recommended Windows Settings 16
Red Locks To Put On 200
Red Locks To Take Off 201
Refunds 150
Rent And Vacancy Schedule 195
Rent History 156
Rent Payment 115
Rent Tax 132
Report On All The Refunds 205
Report On Notes 206
Report Selector 173
Reports 185
Billing 201
Billing Status 202
Bills Sent For Any Time Period 202
Upcoming Bills To Be Sent 201
Collections 191
Cash Collectoin Detail 191
Collection Detail 191
Collection Detail Report 191
Collection/Deposit 191
Collections Since The 1st 192
Daily Analysis 191
Month End Analysis 191
Percentage Of Income By Cash, Check And Cards 192
Revenues Collected Per Unit 192
Daily Report 190
Delinquency 198
Actions Needed 199
When will delinquency actions show u p on the Actions Needed Report? 199
Addresses For Certified Notices Sent 201
Collection Log 201
Current But Owed Fees 201
Delinquents List 199
Late Charges By Unit or Last Name 200
Notices Sent 200
Red Locks To Put On 200
Red Locks To Take Off 201
Exceptions 204
Free Rent 204
Manager Activity 205

Report On All The Refunds 205
Tenanst Paying Less Than Scheduled 204
Tenants Not Due On The 1st.....205
Tenants Paying Less Than Scheduled By Unit Type 204
Tenants Without Rent Raises.....205
Gate Activities 208
Gate Activity.....208
Gate Activity For Unit 208
List Of All Gate Codes.....208
List Of The Gate Codes For Unit 208
Inventory 203
Current Inventory 203
Inventory Transactions 204
Quarterly Inventory Sales 204
Make A Bank Deposit.....209
Monthly Charges.....207
Insurance Activity Report 207
Insurance Activity Report For A Date Range 207
Total Monthly Charges 208
Operations 205
Actual Deposits 205, 206
Amounts Owed.....206
Facility Review/Walk Around Form.....206
List Of All The Units.....206
Phone Call List.....206
Report On Notes 206
Site Notes From Calendar 206, 207
Waiting List 206
Tenant.....202
Credit Cards To Be Charged For A Date Range.....202
Escrow List Of All Tenants 203
Linked Units 203
List Of All Tenants Who Have Prepaid 202
List Of All Tenants Who Have Prepaid Actual.....202
List of Tenants Who Moved Out 202
Master List Of All Tenants 202
Monthly Charges For A Given Time Period 202
Monthly Charges For All Tenants 202
Tenants Getting A Rent Change.....203
Tenants Paying More Than Scheduled 203, 204
Vacancy/Occupancy 194
Damaged/Reserved Units 198
Expected Move-Outs.....196
List Of Reserved Units 198
Move-In & Move-Out Analysis 196, 197
Move-In Analysis.....196
Rent And Vacancy Schedule.....195
Tenants Who Have Vacated.....196
Tenants Who Have Vacated With A Balance 196
Three Available 196
Unit Efficiency Report.....197

Unit Summary 194, 195
Unit Type Report 197
Vacancy By Type 195
Vacancy List 195
Vacancy, Red Lock and Damaged Checklist 198
Reprint All Receipts For A Date Range 126
Reprint Lease Addendum 118
Reprint Receipt 126
Re-Print Rent Raise Letters 142
Required Fields Setup 65
Reserve Unit 109
Un-Reserve 110
Restore 167
Restore Database 166
Restore Non Database Files 166
Revenues Collected Per Unit 192

S

Scheduling 100
Search 209
Setting Up Late Fees 35
Site Notes 172
Site Notes From Calendar 206, 207
Site Setup
Credit Card 32
Source List 30
Statement vs. Bill 210
Support
Print Screen 212
System Recommendations 16

T

Tax Exempt 113
Tenant Credit 137
Tenant Debit 137
Tenant Delinquent History 156
Tenant Information 151
Tenant Payment History 156
Tenant Rent History 156
Tenant Sources 183
Tenant Sources Graph 181
Tenant Transaction History 155
Tenants Getting A Rent Change 203
Tenants Not Due On The 1st 205
Tenants Paying Less Than Scheduled 204
Tenants Paying Less Than Scheduled By Unit Type 204
Tenants Paying More Than Scheduled 203, 204
Tenants Who Have Vacated 196
Tenants Who Have Vacated With A Balance 196
Tenants Without Rent Raises 205
Third Party Gates 106

Three Available 196
Total Monthly Charges 208
Training Mode 72
Transaction History 155
Transfer 126
  Delinquent Tenant 127
  How Are The Tenant's Transfer Numbers Calculated? 128
  Undo Transfer 128
Transfer Credit To Linked Unit Upon Move Out 145
Transfer Database To Another Computer 211

U

Undamaged Units 159
Undo Delinquency Action 152
Undo Late Notice 152
Undo Move-Out 146
Undo Transfer 128
Unit Efficiency Report 197
Unit Efficiency Report Graph 181
Unit Setup 19, 39
Unit Summary 194, 195
Unit Type List 30
Unit Type Report 197
Un-Reserve Unit 110
Upcoming Bills To Be Sent 201
Upload All Key Codes 173
User Setup 36

V

Vacancy By Type 195
Vacancy List 195
Vacancy, Red Lock and Damage Checklist 198
Variance List 30
Void Payment 146
  Not Made Today 147

W

Waiting List 170, 206
Waive Late Fees 162
Why Does QSX Auto Pro Rate At The End Of Month? 211
Word Procesing 176

Z

Zip Code Analysis 183