

STORAGE COLLECTIONS

Signup Checklist – SiteLink Integration

Congratulations on making the decision to use the Storage Collections system to stop your managers from spending days calling to reduce your receivables and bad debt.

The following steps need to be completed in order to get your account configured and to begin calling and texting. After this set-up process is completed your calls and text messages can be automatically deployed when the site manager runs the Storage Collection reminder and processes the past-due tenant file. This configuration process must be completed by someone who has administrator privileges in SiteLink and access to the Corporate Control System.

1. Sign the contract and pricing agreement and return to Storage Collections
2. Log into the Corporate Control Center of SiteLink
3. Click Corporate Users and Rights -> then Users
 - a. Click Add
 - b. User Name: “StorageCollections” (No spaces)
 - c. Password: Please create a unique password - 10 characters or less
 - d. Type same password again
 - e. Select: Password never expires
 - f. Do not change logon times
 - g. Be sure the boxes next to all days of the week are checked
 - h. Under “Permitted Sites” Check the “All Sites” box
 - i. Under “Permitted Rights” Check the following boxes:
 - API Aggregator – allows passing of information to and from Storage Collections
 - Site Management – allows Storage Collections to set site specific credentials

The screenshot shows the 'Users Edit' window for a user named 'StorageCollections'. The window is divided into several sections:

- Permitted Sites (Select One or More):** A table with columns 'Right' and 'Description'. The 'All Sites' right is checked, with the description 'Can access all sites in a corp...'. Other rights listed include 'Call Center Access ...', 'RNL', and 'test'.
- Permitted Rights:** A table with columns 'Right', 'Type', and 'Description'. The 'Site Management' right is checked. Other rights include 'API Aggregator', 'API All Reports', 'API Insurance Reports', 'API Regular', 'Accounting Export', 'Bad Debt Write Off', 'Bulletin Board', 'Corporate Administrator', 'Dashboards', 'Promotions', 'Refund Management', 'Revenue Management', 'SiteLink Search', 'Tenant Management', 'Users and Rights', 'Web Template', and 'All Reports'.
- User Information:** Fields for 'User Name' (StorageCollections), 'Password' (masked with ****), 'Confirm Password' (masked with ****), and 'Email Address'. A 'Disabled' checkbox is present and unchecked.
- Password Policies:** Radio buttons for 'Password never expires' (selected), 'Password must be changed monthly', and 'Password must be changed every 3 months'.
- Log-On Allowed Days:** Checkboxes for days of the week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. All are checked.
- PCI Security Lockout Status:** Radio buttons for 'Unlocked - This user has permission to Log On' (selected) and 'Locked Out - This user has outstanding security violations and cannot Log On until set to Unlocked'.
- Log-On Allowed Times:** Start time is 00:00 and End time is 23:59. Labels 'Day start = 00:00' and 'Day end = 23:59' are present.

Buttons for 'Refresh', 'Print', 'Selection' (All, Clear), 'OK', and 'Cancel' are also visible.

4. Email Todd@StorageCollections.com with the username and chosen password for your account. We will also need your four character corporate code for login purposes.
5. Create the “Storage Collections” reminder process
 - i. Multiple Events can be set-up
 - ii. Each Event **MUST** contain the name **Storage Collections** or it will NOT work
 - iii. Repeat this event every rent period **MUST** be checked
 - iv. Number of days past due is at your discretion and can be changed at any time
 - v. Prerequisite Event should be used when multiple reminders are created, use the drop down to select the prior event that must process before the tenants can appear in the subsequent event. Be sure to set the days after prerequisite event occurs days to one or two days less than the number of actual days between events.

Edit Past Due Events

Storage Collections Event Name

Days past due when this event occurs

Fee

Letter

Print additional letter using Alternate Address (Printing and Mail Service)

Applies to Lease Type

Residential

Commercial

Applies to Billing Type

Weekly

Monthly

Past Due Delivery Method

Forced delivery methods in addition to tenant defaults.

Print

Labels

E-Mail

Options

Used at this site

Display this event on the reminders list

Repeat this event every rent period (requires days past due <= 28 days)

Prerequisite Event Before This Event Can Occur

Prerequisite Event

Days after prerequisite event when this event occurs

6. You have provided voice and SMS message templates by signing and acknowledging the attached documents.
7. Your company's automated messages can be recorded by the professionals at Storage Collections, or someone on your staff may record them if Text-To-Speech is not being used for the entire message content.

8. If not already mentioned, we suggest that you modify the terms of your lease (in the software for all locations) to include a section detailing the Consent to Contact. Storage Collections has some suggested language below that you can add to your contact. We highly recommend that you contact your legal counsel to have them draft something similar or modify the supplied language.

SAMPLE OR SUGGESTED CONTRACT LANGUAGE

COMMUNICATION WITH OCCUPANT: You recognize that You and We are entering into a business relationship. As such, to the extent that any Federal or State law prohibits Us from contacting You by phone, fax, text, email or social media, You hereby provide, as a part of this Rental Agreement, written consent to phoning, faxing, e-mailing, texting and using social media to contact You with business related communications, including automated calls or texts. **If Occupant has provided the Owner with an electronic address, the Owner may communicate with Occupant on any written notices authorized or required under this Agreement or by applicable law via electronic mail.**

9. The last step is to educate your managers on what Storage Collections will do and why you are using the solution. The letter on the following page can be sent to them as a good explanation of what Storage Collections will do. Send this out via email and if you would like to host a short conference call to educate the site managers on how Storage Collections will work we are happy to arrange this for your staff. The calls last approximately 20 minutes and can be scheduled on any weekday. Please contact Todd Sheffer at Todd@StorageCollections.com or 813-992-1031 to schedule a training call.

Attention Site Managers,

Our company recently implemented a service offered through SiteLink that allows us to use the latest technology to help influence our past-due tenants to pay in a timelier manner. The solution is called Storage Collections and it will allow us to improve our service and management of the property in the following ways:

- We will be able to make collections calls outside of our normal office hours if desired, and allow the tenant to “press 1” to access our automated payment gateway.
- We will be able to send automated SMS text messages to our customers asking them to pay and click-thru to our automated payment gateway.
- We will be able to warn tenants of their impending auction as the messages will become more serious the closer they get to auction (assumes the 30+ day message is activated)

This system has been proven to reduce the number of units that go to auction, to improve the timeliness of payments, and to provide an added utility that integrates with our software to run a modern self storage business. It is likely that in the beginning some of your customers will be surprised by the calls or text messages. The tone of the messages goes along with how far past due each customer’s account is at the time. If you get any complaint calls we ask that you dissolve the situation and most importantly clarify that we simply need them to make payment and clear their outstanding balance. To ensure we have a history of the phone and text messages being deployed there is a note automatically added to each of the tenant accounts detailing the result of each call. If there is ever a need to research if/when/or how often a tenant was called or text messaged please review the notes within the tenant’s account. Because this system is using the tenant’s telephone number information it is vital that we gather landline and mobile phone numbers from all of our tenants and enter them accurately. It is also important that we do not put letters or text in the phone number fields. If we know that the tenant’s phone number(s) are invalid we need to have them update their information and promptly change this information within SiteLink.

Any concerns about technical issues with the automated messages should be directed to Storage Collections. Their phone number is 877-825-5504 ext. 2 and their email address is support@storagecollections.com.