StorageMart

# Guidebook

**Easy. Clean. Service.**

Pompano Beach, FL

Kansas City, MO

Hillside, IL

Montréal, QC

# Hello.

Avon, CO

Jefferson City, MO


Miramar, FL

Elgin, IL

Vancouver, BC

Columbia, MO


Springfield, MO

We are so excited for you to join the world's largest, privately owned, self-storage company and look forward to what lies ahead for you at StorageMart.

**Welcome to the team.**

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# About Us

**To satisfy every customer with friendly service and a welcoming self-storage environment.**

StorageMart began in **1999** with a single store on Rangeline in Columbia, Missouri. Now, with **over 250 locations,** and more than 500 employees, StorageMart spans from coast to coast in the US and Canada and across the world to the UK. **Three countries,** and 13 million square feet later, StorageMart is the largest privately-owned, family-operated storage company in the world.

Led by the Burnam family, who have been in the storage industry for four generations, StorageMart is dedicated to providing easy, clean, and friendly service to every customer.

In addition, StorageMart is committed to giving back to the many communities it calls home through the **Store It Forward** program.


1999-present

# Notepad

This is a good place to write down your passwords, questions, contacts, etc.

## Contact List

# Tools & Resources

A snapshot of terms and tools you will use daily.

## 1 Rental Manager

Rental Manager is the “lead management system” for any “pre-customer” communications. Housed in StorageBook, Rental Manager communicates with Total Recall.

## 2 Total Recall

One of StorageMart’s systems, Total Recall, is used for any “post rental” communications with customers. Rental Manager transfers customer data into this system to be managed and this can be located in the Web Virtual Desktop.

## 3 Reports Center

Reports Center is found in Web Virtual Desktop and is the MAIN program used when managing each customer’s account. Reports from Report Center are used to track store business.

## 4 StorageBook

StorageBook is StorageMart’s internal website used by all StorageMart employees. StorageBook (sometimes referred to as SharePoint) houses tools such as “intranet”, UKG, ADP, and Help Desk.



Pictured **Jefferson City, MO**

## 5 UKG

UKG is StorageMart's program for everything Human Resources (time clock, benefits dashboard, pay stubs, time off, etc.).

UKG has a mobile app! Log in using the company access code and your StorageMart email.

## 6 Email

Personal StorageMart email address.

firstname.lastname@storage-mart.com

## 7 Web Virtual Desktop (WVD)

This system provides secure access to all programs and files for Total Recall and Reports Center.

## 8 Site Email

Email specific to each store (and separate from personal StorageMart emails) used to email vendors, follow-ups for inquiries, and customer issues.

S(StoreNumber)@storage-mart.com

## 9 ADP

ADP is StorageMart's 401 (k) management services provider.

StorageMart matches your contribution to help build your retirement fund!

## 10 OneDrive

OneDrive is a StorageMart's chosen cloud-based system for accessing, creating, storing, and sharing word documents, excel files, PowerPoint projects, and even email.

Accessing OneDrive can be done through StorageBook or office.com with your personal StorageMart email and password.

## 11 Help Desk

Help Desk is a tool employees can use to request support in the event of issues involving customer accounts, hardware/software issues, and any other general technical issues.

Help Desk tickets are submitted through the Help Desk link in StorageBook.

over 250 stores

# **StorageMart's**
# Processes Guide

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## Opening Your Store

1. Turn on your computer, sign in, and **clock in.**

2. Open all your Daily Operating Systems:
   - Total Recall
   - Reports Center
   - StorageBook
   - Rental Manager
   - Location Email
   - Personal Email
   - Gate System

3. Access Petty Cash - (Open)
   - Reports Center

4. Count Petty Cash - (Open)
   - Count piece by piece, and notate "Open" in notes

5. Print the Daily Sales Plan

6. Check Email/Voicemail

7. Open the Facility
   - Manage Closings/Collection in Rental Manager

8. Complete site walks (grounds & lock check)

9. Complete Bank Deposits
   - Every 10th, 22nd and the last business day of each month. (Unless over $1,000, then go immediately)

## Daily Paperwork

Your daily paperwork should be kept together to **file** at the end of each day. Below is a list of what should be included.

1. Daily Sales Plan

2. Daily Lock Check Report

3. Collections Worksheet
   - On applicable days of the week / month

4. Cash Drawer count

5. Undeposited Receipts Report

6. Finalized deposit

# **StorageBook Home Page** - Navigating Your Daily Resources

1

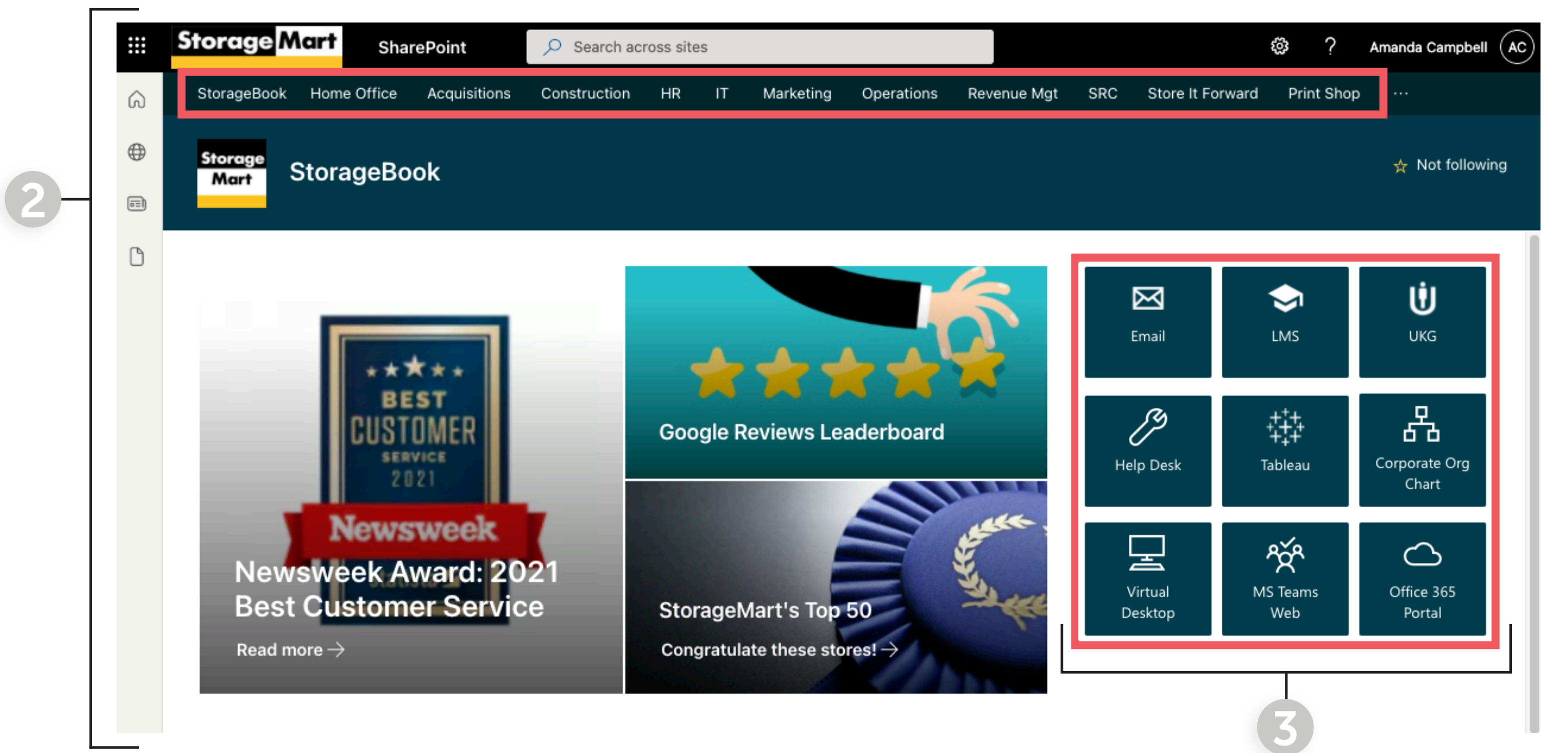
**First,** log into StorageBook (tkgstoragemart.sharepoint.com)

You will select your email (or type it in), followed by your password.


2

Once logged in you will see the **Dashboard + Department Tabs.**

This section will have department pages and quick links for conducting daily store business.




3

To begin your day, ensure you open these **quick links.**

UKG

Access your time clock and benefits.

Virtual Desktop (only on desktop)

- Report's Center
- Total Recall

Email

Access personal and site email.

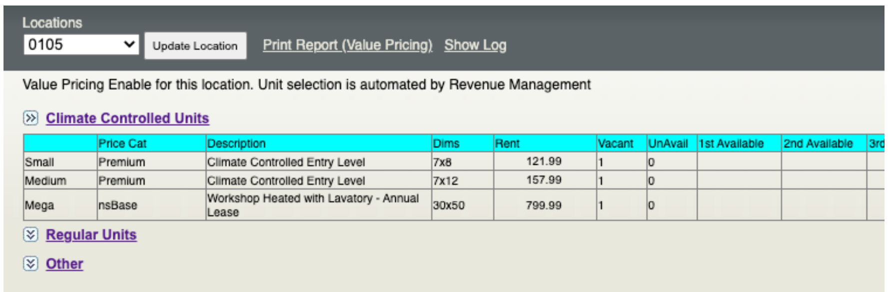
MS Teams Web

This will take you to the Microsoft Teams chats.

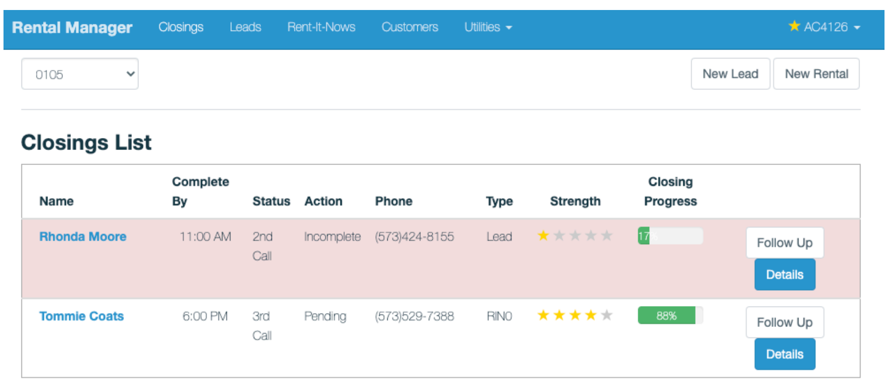
4 Then, scroll down to the right side of the page to find **Operations Links.**

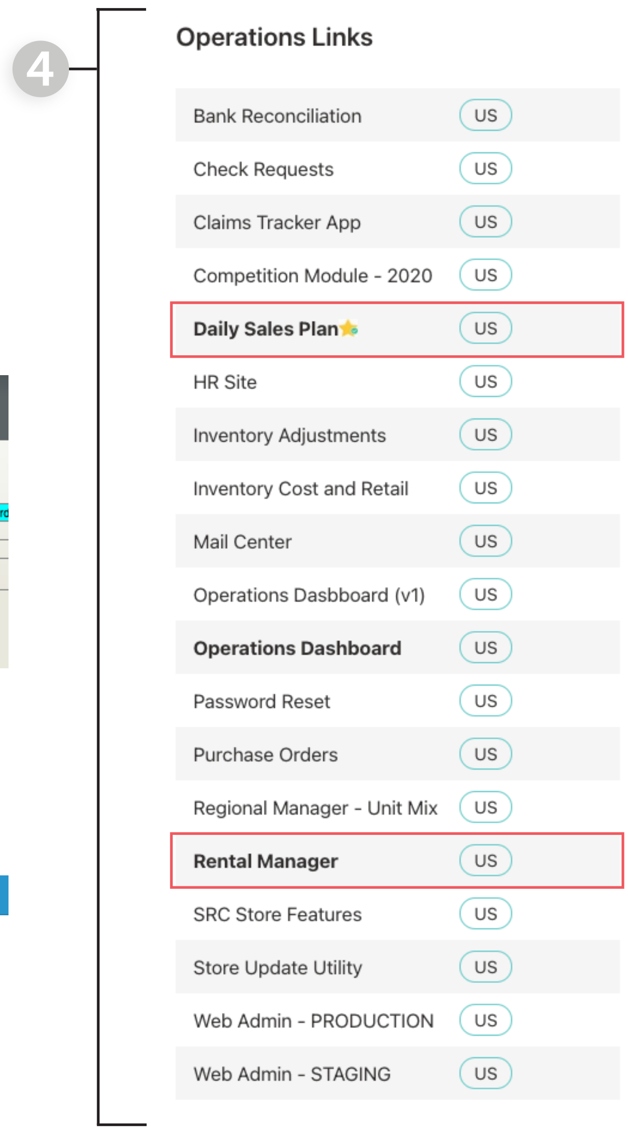
This column is for specific links and programs that are utilized daily such as:

-Daily Sales Plan




-Rental Manager



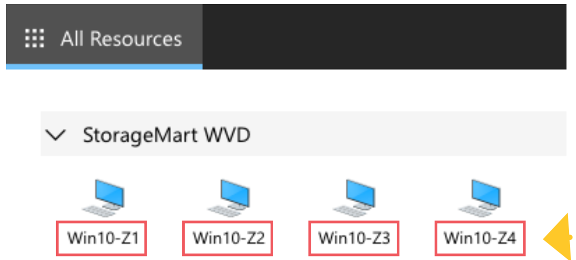

5 **To begin conducting store business, follow these steps:**

- **Step 1:** Log into StorageBook.
- **Step 2:** Navigate to the Quick Links panel.
- **Step 3:** Open UKG, Email, Virtual Desktop (on desktop), and Teams.
- **Step 4:** Scroll down on the homepage to the **Operations Links,** and open your **Daily Sales Plan,** and **Rental Manager.**

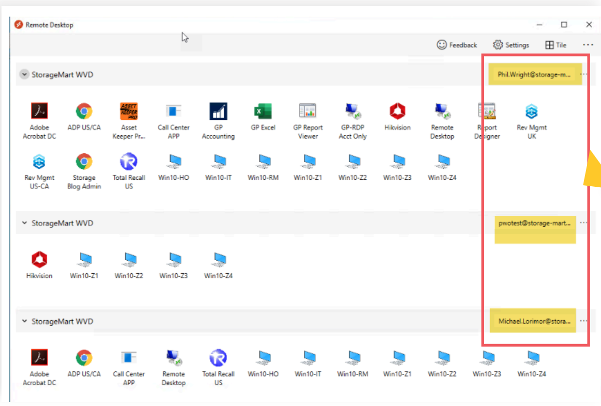
1 Select "**Virtual Desktop**". on your desktop.


2 Next, select the **correct zone** for your region.

**Z1** - Kevin Boggs
**Z2**- Phil Dewsbury
**Z3** - Alain Gingras
**Z4** - Dan Saunders




3 Then, select the **correct account**.




4 You now have access to **"Virtual Desktop"**.

notes



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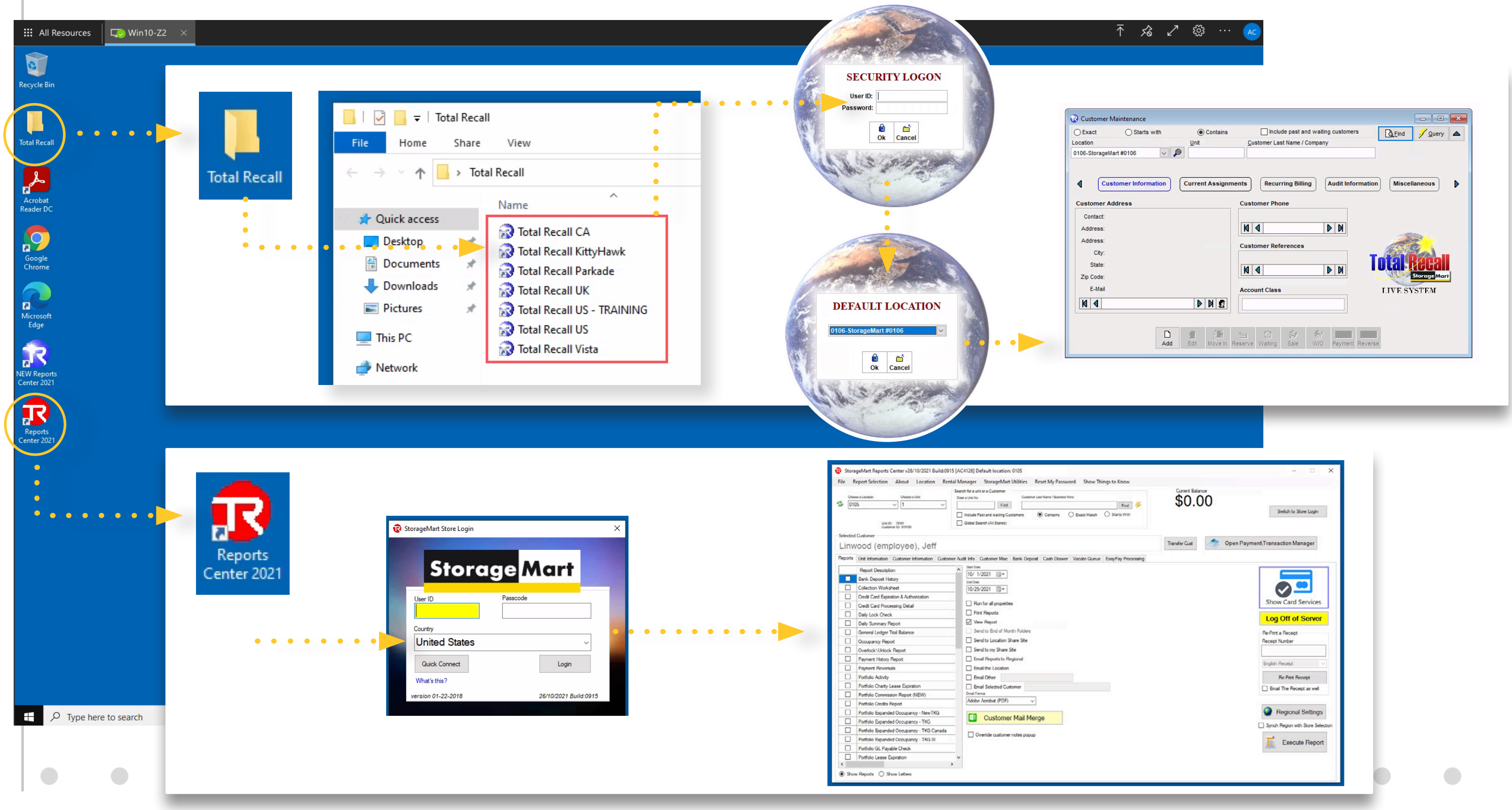
# Accessing Total Recall & Reports Center (in WVD)

1 Once in “**Virtual Desktop**”, select the two programs as outlined below and you now have access to: **Total Recall and Reports Center.**

LOGIN info for Total Recall and Reports Center:

**Your user ID is the first initial of your First and Last Name followed by the last four digits of your social security number. (ex: AB1234)**

Your password will be the same password you use to log into StorageBook.

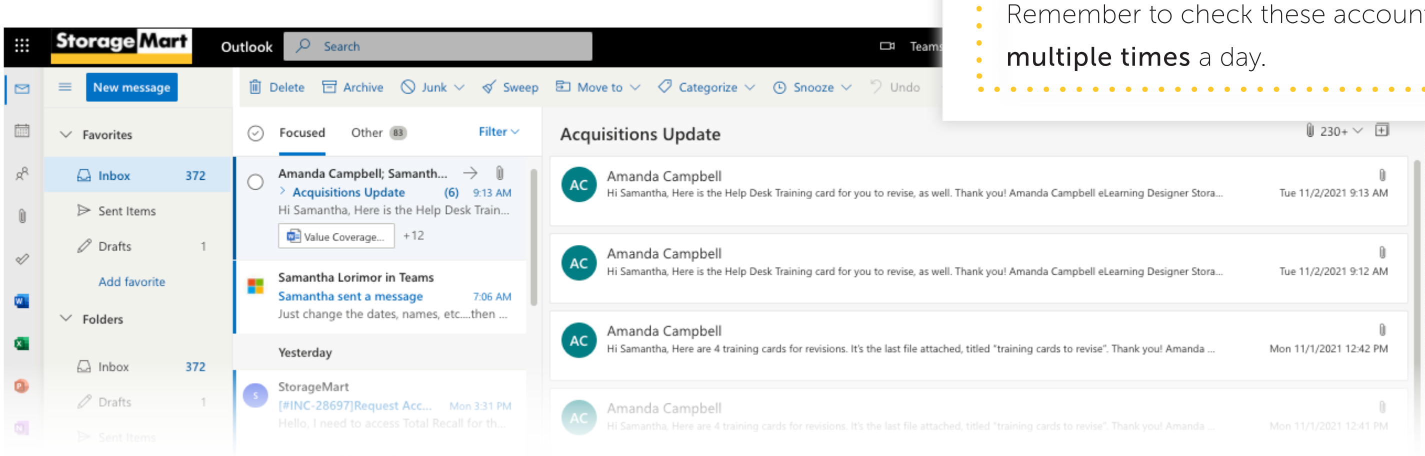


# Employee and Site Email System

1 To access your **EMPLOYEE email,** select **"Email",** on StorageBook's homepage.

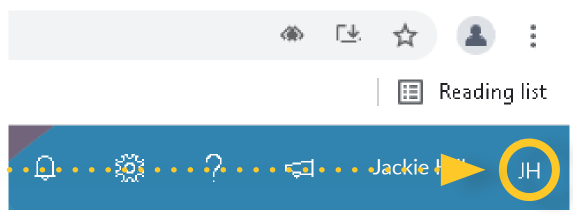

2 This will take you to your personal StorageMart inbox, which will be used for communicating with HR, Training, Operations, and your RM.

Remember to check these accounts **multiple times** a day.

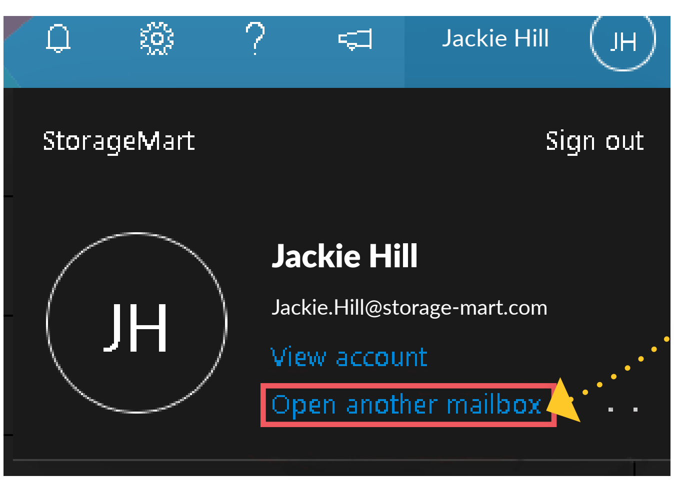



1 **Accessing a SITE email begins** by first logging into your personal email.

Once in your personal email, **click your initials in the top right corner.**

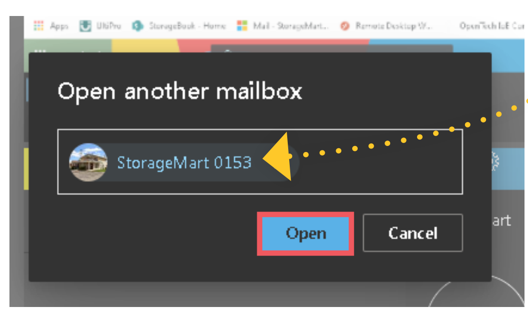



2 Next, select **"Open another mailbox".**




3 Finally, type in the relevant store's mailbox and click **"Open".**

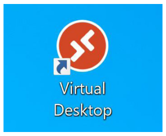
For example: **StorageMart 0153**



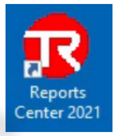

**In the instance of needing to assist another store,** managers can access any store's email, from another store.

# **Petty Cash** Open

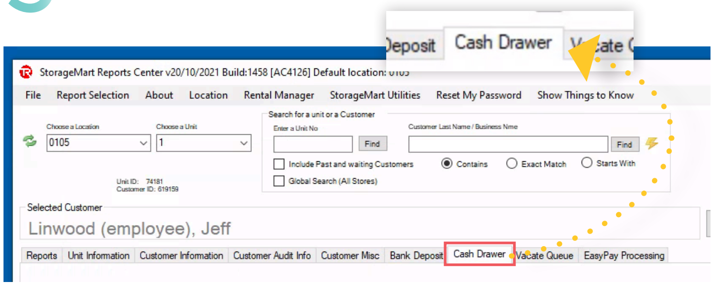
1 First, ensure that you are in **Virtual Desktop.**



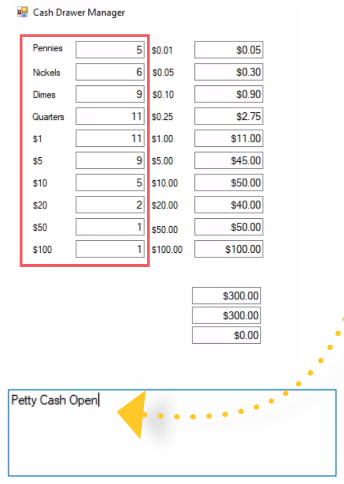

2 **Then,** log into **Reports Center.**




3 Next, select **cash drawer.**




4 Finally, fill in the amount **counting piece by piece** and save.




For example, you counted 11 quarters, so we type in 11, in the box next to the word "Quarters", not $2.75.

Note: Add **"Petty Cash Open",** to the manager note section.

5 When drawer is balanced, select the "Save" button, and **print your cash drawer count as part of your daily paperwork.**

notes

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# **StorageMart's** Daily Sales Plan

**StorageMart's Daily Sales Plan is:**

A price list that you can use to quote prices for customers that walk into your office or call your store.

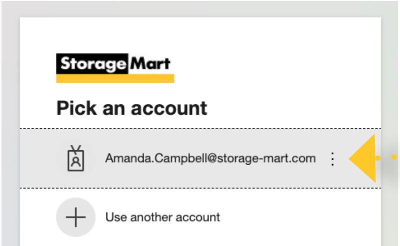
**This report shows vacant unit inventory,** with prices of each unit and any promotions that may be available for that unit type.

**Our prices can change from day to day,** so it's important to print a new daily sales plan each morning, or as needed.

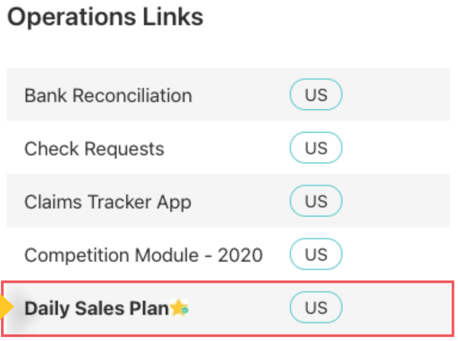
**Pro-tip:** in some instances prices can change during the day, so check your Daily Sales Plan multiple times over the course of the day.

## Accessing the Daily Sales Plan

1 **First,** log into StorageBook **(tkgstoragemart.sharepoint.com)**



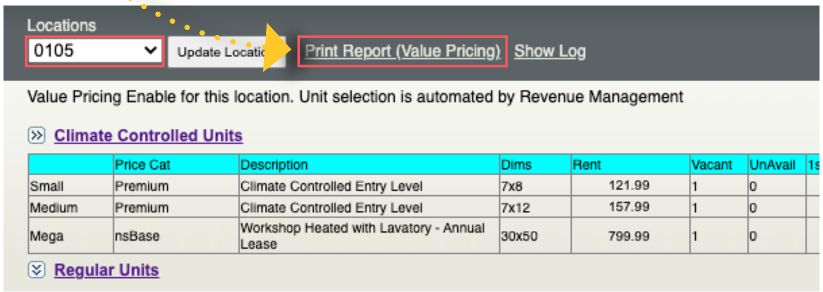

2 Then, scroll down to the right side of the page to find the **Operations Links.** Select the **Daily Sales Plan** link.




3 Once in the **Daily Sales Plan,** make sure the location in the top left corner of the screen is the location you are working at.

Click **Print Report (Value Pricing)** to bring up a printable version (the Best Value units will be highlighted).

Now, **print the plan** using the printer icon in the top right corner of the screen when the PDF appears.



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# StorageMart's Daily Sales Plan

Storagemart #0801
5979 Butterfield Rd
Hillside, IL 60162
(708)449-0384

## Daily Sales Plan

**Valid only for Thursday, September 9, 2021**

| Unit Type (Dims) | Pricing Type | Monthly Rate | Preferred Cust Rate | Approved | Rent Today: RIN | Rent Today: Paid to Date | Rent Today: Adv Purchase | Next Available Units |
|---|---|---|---|---|---|---|---|---|
| **Climate Controlled** | | | | | | | | |
| **Small** | | | | | | | | |
| 5x5-Climate Controlled [25 SF] | Best Value | ~~$132.99~~ | $112.99 | No Discount | $82.86 | 10/1/2021 | 15 days | #715 |
| 10x5-Climate Controlled [50 SF] | Deluxe | ~~$164.99~~ | $144.99 | First Month FREE w/ Prepay | $251.32 | 12/1/2021 | 30 days | #814 |
| 5x10-Climate Controlled [50 SF] | Deluxe | ~~$164.99~~ | $144.99 | First Month FREE w/ Prepay | $251.32 | 12/1/2021 | 30 days | #575, #441, #563 |
| 5x10-Climate Controlled [50 SF] | Best Value | ~~$144.99~~ | $124.99 | First Month FREE w/ Prepay | $216.65 | 12/1/2021 | 30 days | #433, #779, #652 |
| 5x10-Climate Controlled [50 SF] | Standard | ~~$124.99~~ | $104.99 | First Month FREE w/ Prepay | $181.98 | 12/1/2021 | 30 days | #919, #922, #611 |
| 5x15-Climate Controlled [75 SF] | Deluxe | ~~$178.99~~ | $158.99 | No Discount | $116.59 | 10/1/2021 | 30 days | #448 |
| 5x15-Climate Controlled [75 SF] | Best Value | ~~$156.99~~ | $136.99 | No Discount | $100.46 | 10/1/2021 | 30 days | #534 |
| 5x15-Climate Controlled [75 SF] | Standard | ~~$134.99~~ | $114.99 | No Discount | $84.33 | 10/1/2021 | 30 days | #970 |
| **Medium** | | | | | | | | |
| 10x10-Climate Controlled [100 SF] | Deluxe | ~~$219.99~~ | $199.99 | No Discount | $146.66 | 10/1/2021 | 27 days | #325 |
| 10x10-Climate Controlled [100 SF] | Best Value | ~~$200.99~~ | $180.99 | No Discount | $132.73 | 10/1/2021 | 27 days | #787, #437 |
| 10x10-Climate Controlled [100 SF] | Standard | ~~$172.99~~ | $152.99 | No Discount | $112.19 | 10/1/2021 | 27 days | #949, #490 |
| 10x15-Climate Controlled [150 SF] | Deluxe | ~~$312.99~~ | $292.99 | First Month FREE w/ Prepay | $507.85 | 12/1/2021 | 30 days | #370, #371 |
| 10x15-Climate Controlled [150 SF] | Best Value | ~~$283.99~~ | $263.99 | First Month FREE w/ Prepay | $457.58 | 12/1/2021 | 30 days | #381, #339, #341 |
| 10x15-Climate Controlled [150 SF] | Standard | ~~$242.99~~ | $222.99 | First Month FREE w/ Prepay | $386.52 | 12/1/2021 | 30 days | #666, #487, #703 |
| **Large** | | | | | | | | |
| 10x20-Climate Controlled [200 SF] | Best Value | ~~$367.99~~ | $347.99 | No Discount | $255.19 | 10/1/2021 | 7 days | #369 |
| **Mega** | | | | | | | | |

* RIN price does not include taxes, protection plan or administration fee.

**Valid only for Thursday, September 9, 2021**

Page 1 of 2
Ran:9/9/2021 11:29 am

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**1. Store Location**
Verify that you have printed the correct Daily Sales Plan.

**2. Vacant Unit Descriptions & Dimensions**
This will show you the square footage.

**3. Price Type & Monthly Rates**
Shows unit type and monthly rate.

**4. Weekly Quotes**
You will quote this weekly price to your customers.

**5. Discounts Offered**
This section displays the promotion offered on the unit.

**6. Dates of listed vacancies.**
Valid only for date listed. It's required that a new Daily Sales Plan is printed daily.

**7. "Rent Today" (RIN)**
This section will show you how much the customer will owe if moving in today.

**8. "Rent Today" (Paid to Date)**
This is the date the payment amount will take the customer to, when renting.

**9. Next Available Units**
Shows which units are ready to be rented next.

**10. Remember!** The RIN price on the Daily Sales Plan, does not include all fees associated to move in. You must calculate tax, value coverage, and the admin fee.

# **StorageMart Value Pricing** Overview

## Unit Designations

StorageMart's **unit classification** program for meeting each customer's specific needs. With **three unique tiers,** customer's can better identify what they **value** and **prefer** so that a manager can help them select the unit that best matches them.

### Deluxe

- The best available unit of **any type.**
- Closest to access gates, building doors, loading docks, and any other desirable place on site.
- For the customer who prefers **convenience** and **easy access.**

### Best Value

- The next best available unit, following deluxe.
- Closer to access points than the standard units, but further than Deluxe units.
- For the customer who prefers convenience at a great price **(who wants the "best value")**

### Standard

- **High-quality units**, in less desirable locations
- Furthest units away from access points, **but still** of high, StorageMart quality
- For the customer who prefers quality storage at a **budget friendly price** (for the customer on a budget with infrequent access)

## Daily Site Walk

At the **beginning & end** of your shift you should be following the **below** activities.

1 Checking for Move-Outs

- Completing security lock checks, ensure locks are latched and secure
- Use the Daily Lock Check Report to ensure all units have the correct corresponding lock

2 Looking for units that may have been tampered with.

4 Checking Auction tags, if necessary.

5 Ensuring that restricted areas are still locked, and doors are shut.

6 Documenting climate control temperatures

7 Documenting General Maintenance needs

- Including unit debris and landscaping issues.

**REMEMBER**

- This is done twice daily (for security and upkeep!)
- Bring your Daily Lock Check Report, pencil, and paper.
  - Note any issue you found on site and follow up on them.

# **StorageMart's** Daily Lock Check Report

**StorageMart #0105**
2403 Rangeline St
Columbia MO 65202

**Daily Lock Check**
**9/20/2021**

Page 1 of 3

| Unit | Status | Notes | Unit | Status | Notes | Unit | Status | Notes | Unit | Status | Notes |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Occupied | | 58 | Occupied | | 106 | Over Lock | | 153 | Occupied | |
| 1A | Maintenance | | 59 | Over Lock | | 107 | Occupied | | 154 | Vacant | |
| 3A | Occupied | | 60 | Occupied | | 108 | Occupied | | 155 | Occupied | |
| 3B | Occupied | | 61 | Vacant | | 109 | Occupied | | 156 | Vacant | |
| 4A | Occupied | | 62 | Occupied | | 110 | Occupied | | 157 | Lock Cut | |
| 5 | Occupied | | 63 | Occupied | | 111 | Occupied | | 158 | Occupied | |
| 08 | Occupied | | 64 | Occupied | | 112 | Occupied | | 159 | Occupied | |
| 09 | Vacant | | 65 | Vacant | | 113 | Occupied | | 160 | Occupied | |
| 10 | Over Lock | | 66 | Occupied | | 114 | Occupied | | 161 | Occupied | |
| 11 | Occupied | | 67 | Occupied | | 115 | Occupied | | 162 | Occupied | |
| 12 | Lock Cut | | 68 | Occupied | | 116 | Occupied | | 163 | Occupied | |
| 13 | Occupied | | 69 | Vacant | | 117 | Occupied | | 164 | Lock Cut | |
| 14 | Vacant | | 70 | Occupied | | 118 | Occupied | | 165 | Over Lock | |
| 15 | Vacant | | 71 | Occupied | | 119 | Occupied | | 166 | Occupied | |
| 16 | Occupied | | 72 | Vacant | | 120 | Vacant | | 167 | Occupied | |
| 17 | Occupied | | 74 | Occupied | | 121 | Occupied | | 168 | Occupied | |
| 18 | Occupied | | 75 | Occupied | | 122 | Over Lock | | 169 | Occupied | |
| 19 | Occupied | | 76 | Occupied | | 123 | Occupied | | 170 | Vacant | |
| 20 | Occupied | | 77 | Occupied | | 124 | Vacant | | 171 | Vacant | |
| 21 | Vacant | | 78 | Vacant | | 125 | Vacant | | 172 | Occupied | |
| 22 | Occupied | | 79 | Occupied | | 126 | Occupied | | 173 | Occupied | |
| 23 | Vacant | | 80 | Occupied | | 127 | Vacant | | 174 | Company Unit | |
| 24 | Occupied | | 81 | Occupied | | 128 | Vacant | | 175 | Occupied | |
| 25 | Occupied | | 82 | Occupied | | 129 | Occupied | | 176 | Occupied | |
| 26 | Occupied | | 83 | Occupied | | 130 | Occupied | | 177 | Over Lock | |
| 27 | Occupied | | 84 | Vacant | | 131 | Vacant | | 178 | Occupied | |
| 28 | Over Lock | | 85 | Occupied | | 132 | Occupied | | 179 | Occupied | |
| 29 | Maintenance | | 86 | Occupied | | 133 | Occupied | | 180 | Occupied | |
| 30 | Occupied | | 87 | Occupied | | 134 | Occupied | | 181 | Occupied | |
| 31 | Occupied | | 88 | Occupied | | 135 | Occupied | | 182 | Vacant | |

### 1. Store Location

Verify that you have printed the correct location's Daily Lock Check Report.

### 2. Date of Lock Checks

Valid only for date listed. You will need to print a new lock check report every day.

### 3. Unit Number

This will show you the number of the unit to locate the lock. The unit number is displayed here.

### 4. Status of Unit

This section will show you the current status of each unit's lock, and which ones may require action.

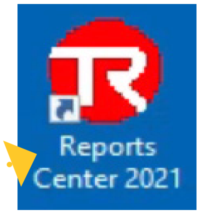
- Occupied (white)
- Vacant (yellow)
- Maintenance (green)
- Over Lock (red)
- Lock Cut (red)
- Company Unit (blue)

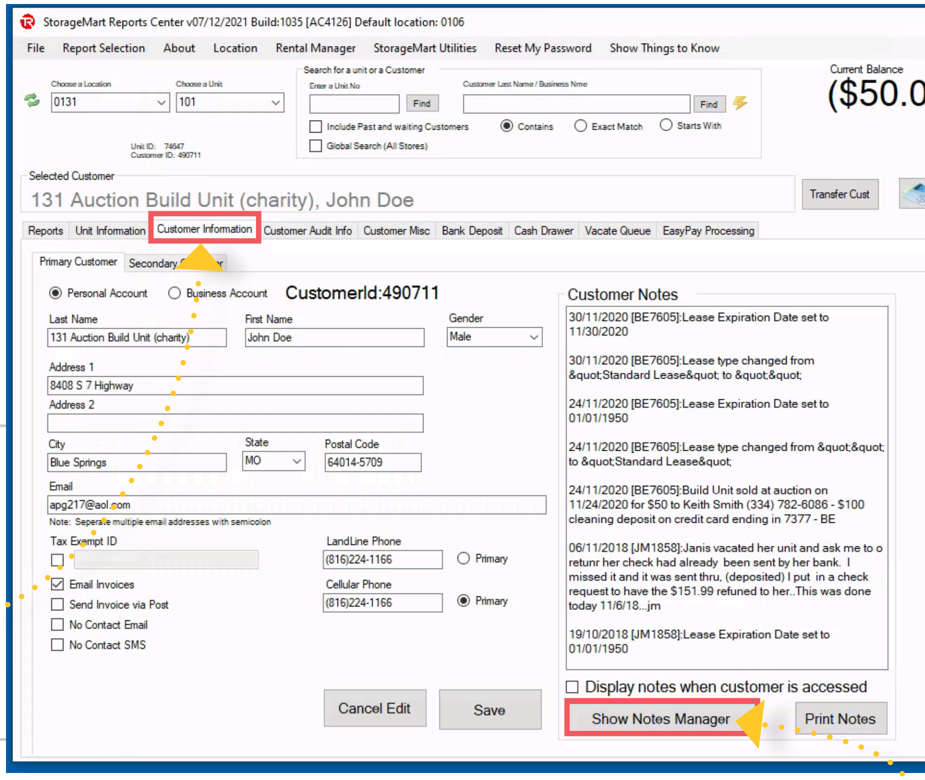
### 5. Notes

This is a good place to make any notes regarding the unit status or unit locks.

# Adding Customer Notes

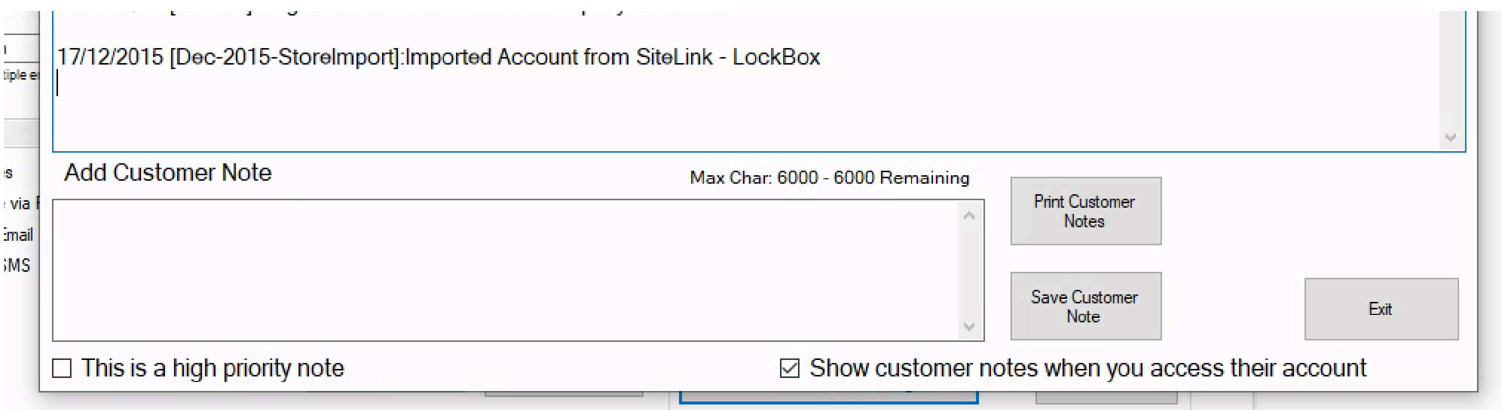
1 First, ensure you are logged into **Reports Center.**



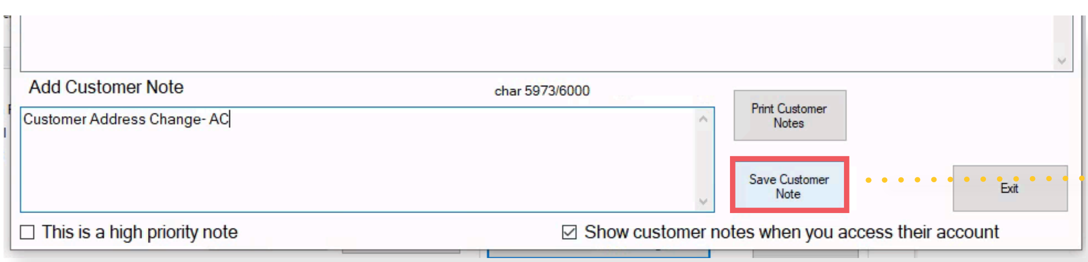



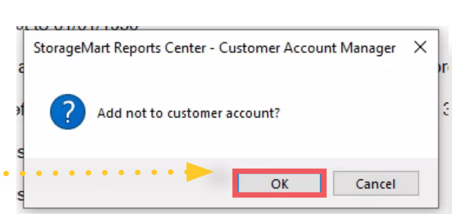

2 Locate your customer using the location bar at the top of the screen. Then, select the **Customer Information** tab

3 Next, select the **"Show Notes Manager"** tab. This will bring you to a new window for typing your note in.




4 Type out your note, then, click, **"Save Customer Note".** In the pop up window, select **"OK"** to complete the process.



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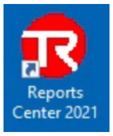
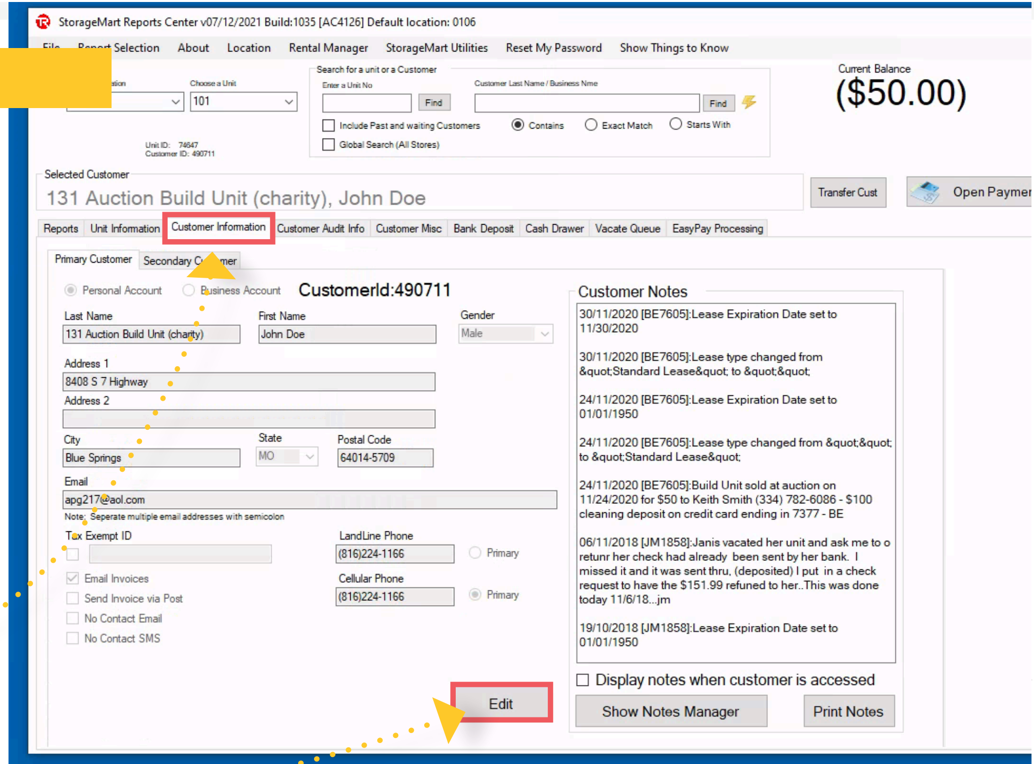
# Editing a Customer

1 First, ensure that you are logged into **Reports Center**.

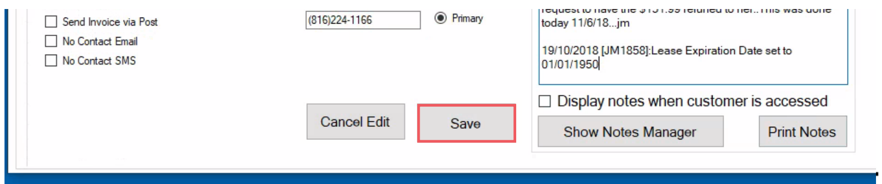



2 Locate your customer using the location bar at the top of the screen. Then, select the **Customer Information** tab

3 Then, click the **Edit** button.



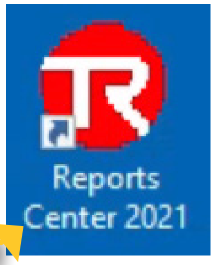

4 Update the necessary information and click the **"Save"** button that will appear after selecting "**Edit**".



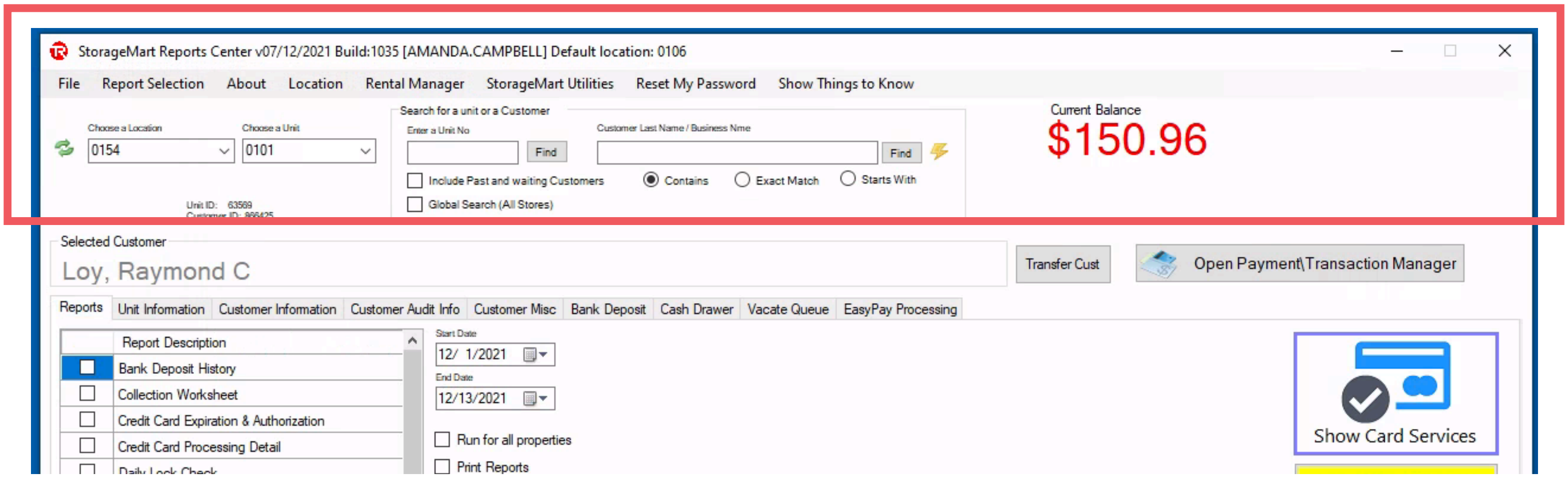

notes

# How to Take a Payment

1 First, log into **Report's Center.**

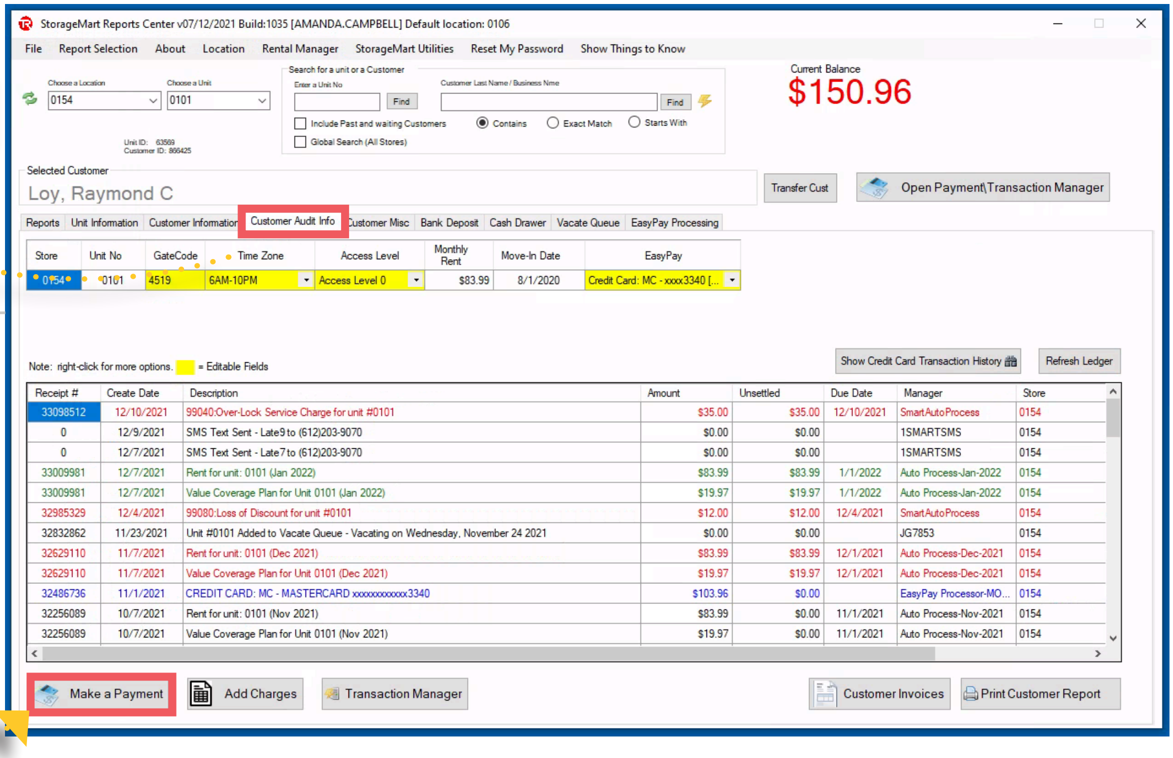



2 **Once in Reports Center,** select the Tenant that you would like to take a payment from by using the search box that is located at the top of the screen.




3 Now, select the **Customer Audit Info** tab.


4 Select the **"Make a Payment"** button, located at the bottom left of the screen.



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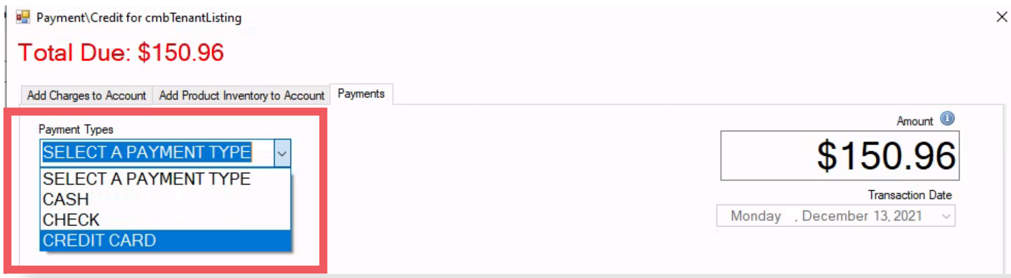
# How to Take a Payment

5 Next, select the **payment type** that the customer would like to use to make the payment.




6

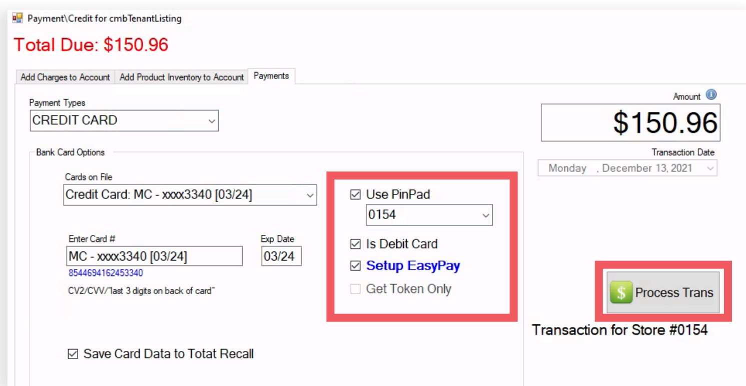
For this example, the customer has a credit card on file, which auto populated after selecting.

Confirm the **Site Number** is correct.

Check **"Is Debit Card",** if debit card.

Check **"Setup EasyPay",** to initiate autopay on card.

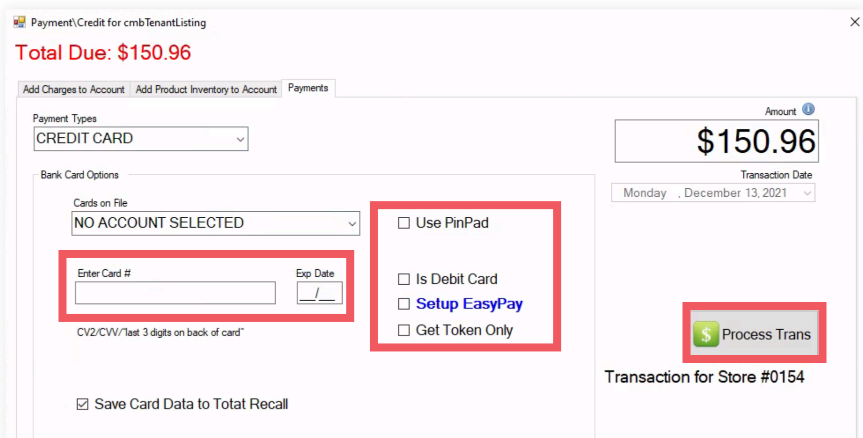
Finally, select **"Process Trans"** to complete the payment.




If the customer **does not have a card on file,** manually fill in the card or have the customer swipe/insert their card in the **Pin Pad by checking "Use Pin Pad"** (Confirm the Site Number is correct).

Now, check the applicable boxes:

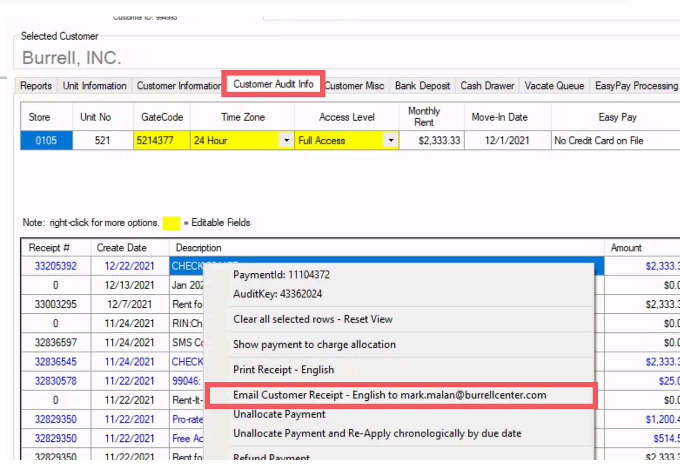
- **Is Debit Card**
- **Setup EasyPay**




Finally, select **"Process Trans"** to complete the payment.

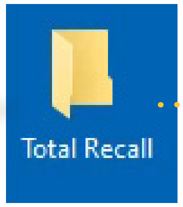
7 Email the receipt to the customer, unless otherwise requested.

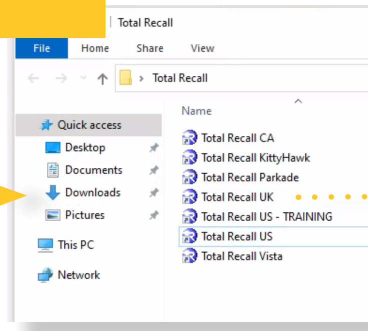
To email a receipt, find your customer in Reports Center and select the **Customer Audit Info** tab. Right click on the applicable charge. Select **"Email Customer receipt"**. On the next screen, click "Email Report" Email Report in the top right corner and follow the screen prompts, selecting "OK" to complete the process.



# **Counter Sales** (for an Existing Customer)

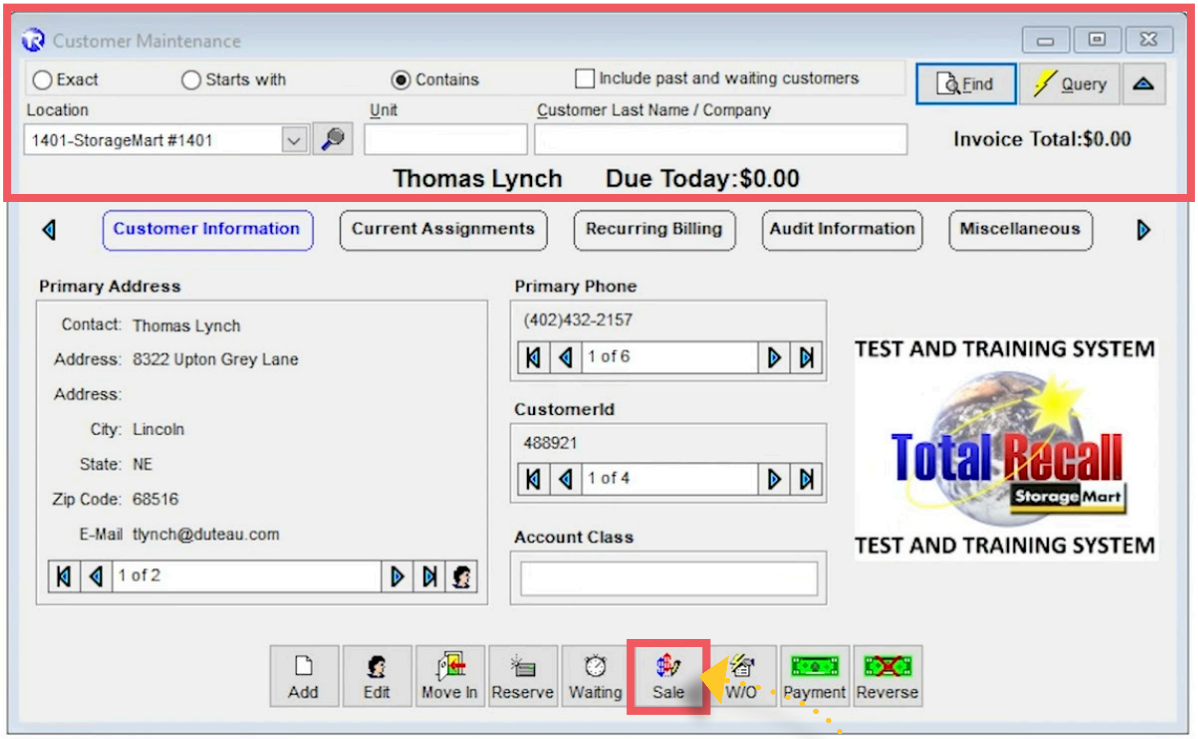
1 First, ensure you are logged into **Total Recall and have selected the correct location.**





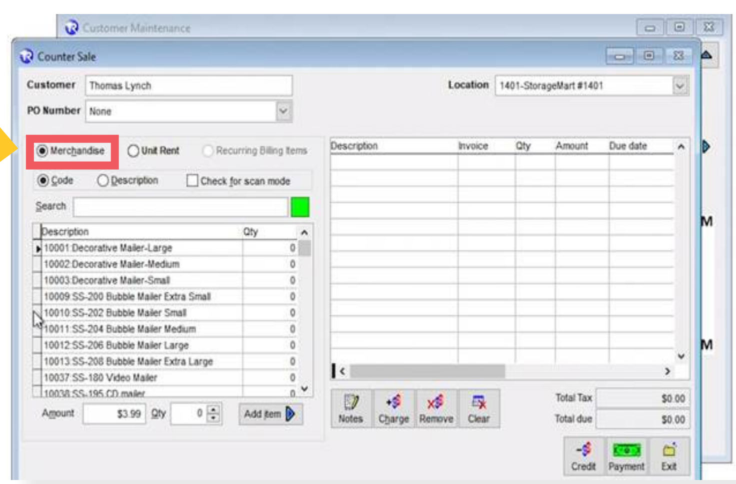
2 **Then,** select the correct customer's account to make the transaction.




3 Once the account is pulled up, select the **"Sale"** tab.

4 Now, select the bubble next to "**Merchandise**".

If there is a charge present **that the customer wishes not to pay** (such as rent, value coverage, or late fees), **remove this charge first using the "Remove"** button, and then add the merchandise charge.





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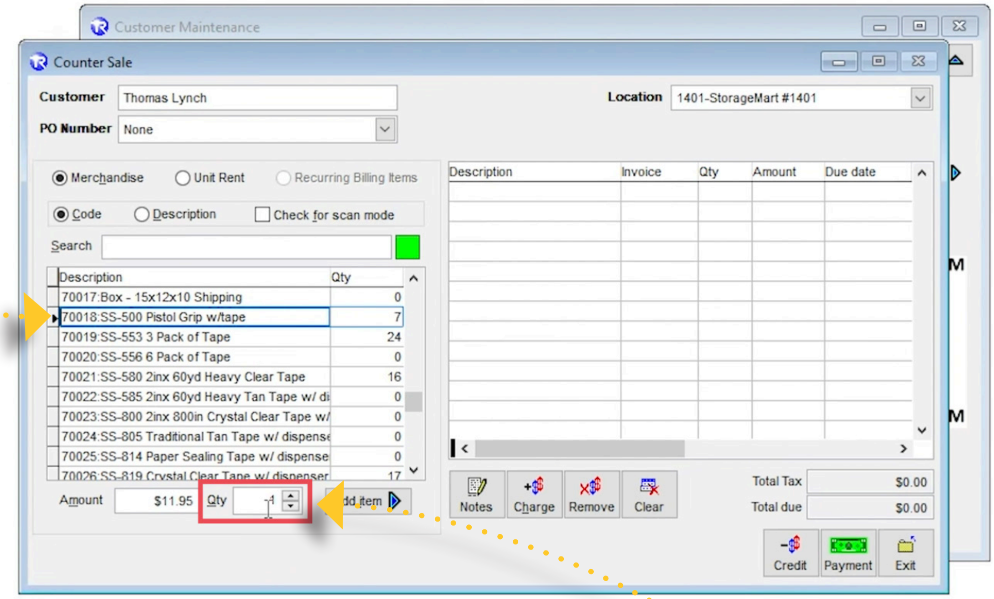
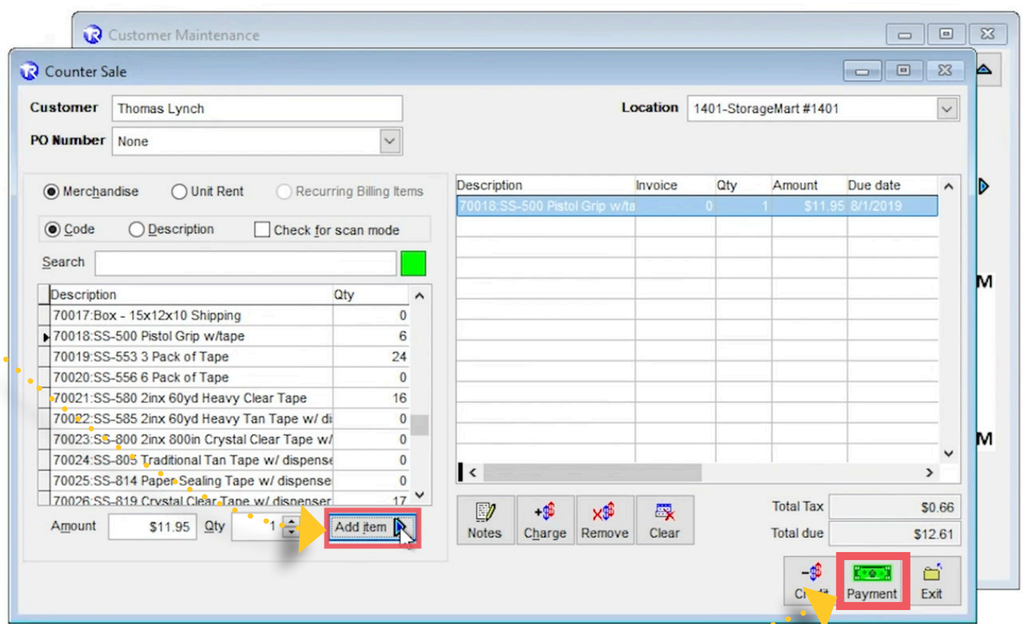
# **Counter Sales** (for an Existing Customer)

5 Select the item the customer wishes to purchase by clicking to the **left** of the item.




6 Select the correct quantity at the bottom of the screen

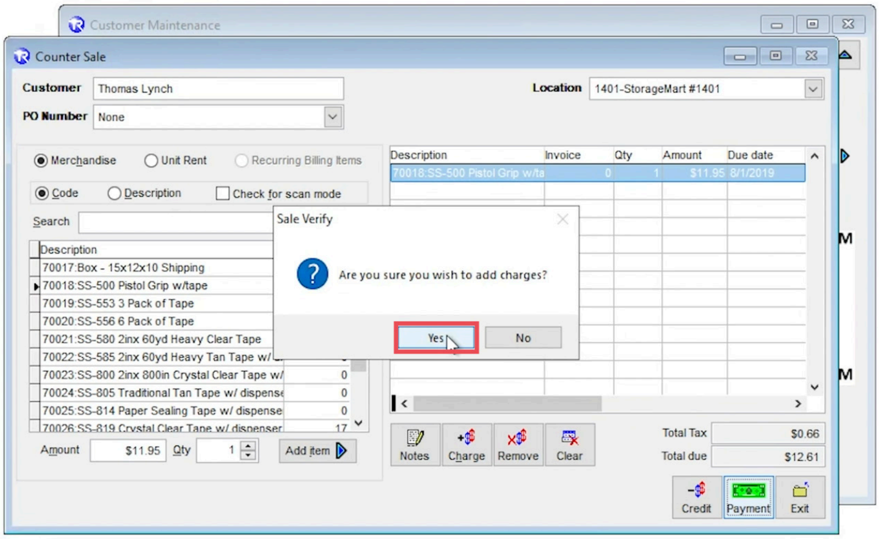
7 Once this is correct, press the **"Add Item"** button.




8 Once confirmed, click **"Payment"**.

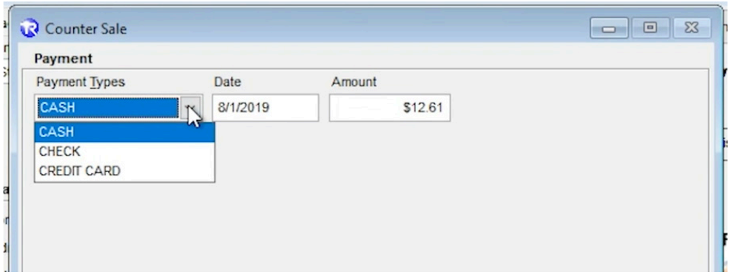
# **Counter Sales** (for an Existing Customer)

**9** A box will appear to confirm that you wish to add the charges. Click **"Yes".**



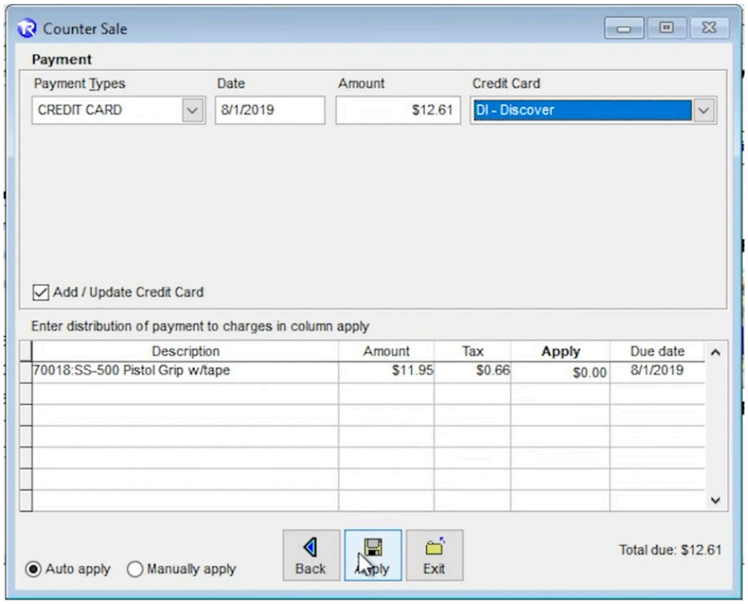

**10** Click the **Payment Types** drop down menu and select the payment type.

For this example we have selected CREDIT CARD.




**11** Next, select the correct card type. If the customer does not have a card on file, the customer will need to insert their card into the Pin Pad, and you will select **"Apply".** They can then remove their card.

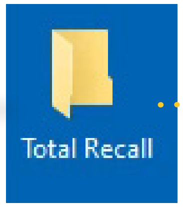
Then, click **"Yes"** on the pop up box to add the payment. Now complete the process on the Pin Pad, then select **"Exit",** followed by **"Yes"** on your screen, to complete the box.

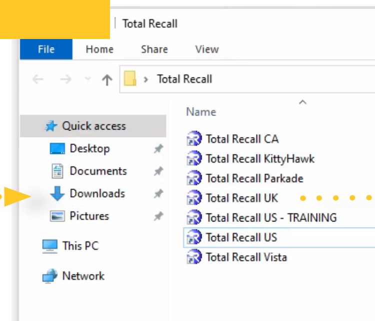



**12** Email the receipt to the customer, unless otherwise requested. If the customer requests a printed receipt, print 1 copy of the receipt in the "**Print Receipt**" window. Click **"Exit"**, and you are done.

# **Counter Sales** (for a Walk-In Customer)

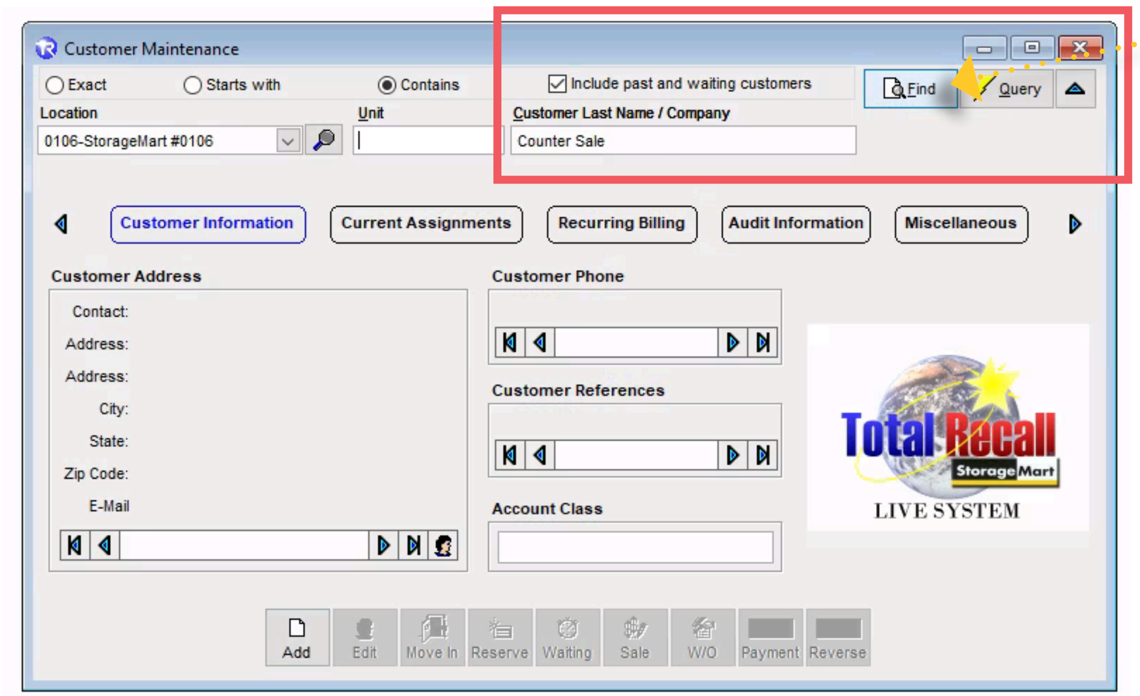
1 First, ensure you are logged into **Total Recall and have selected the correct location.**



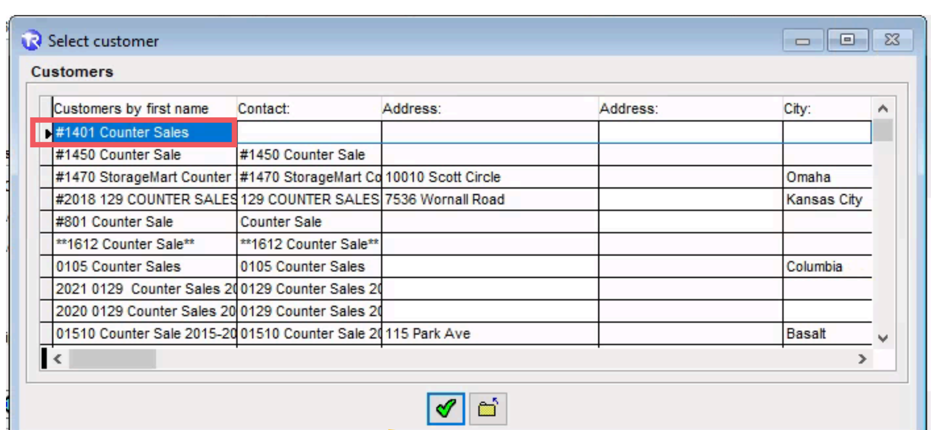





2 **Then,** using the search box labeled, **"Customer Last Name/Company,"** type **"Counter Sale".** Ensure the box is checked next to the **"Include past and waiting customers"** Then, click **"Find".**

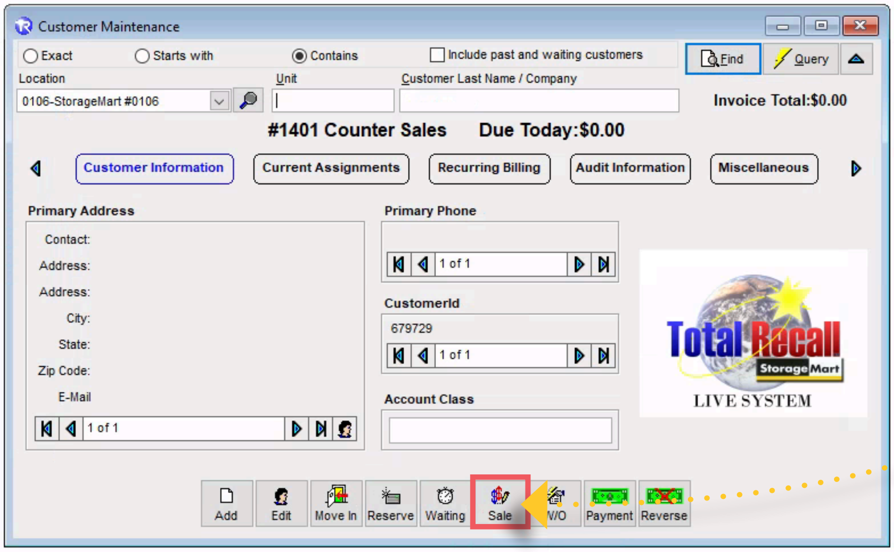



3 Once the account is pulled up, select the corresponding store number's **Counter Sales** customer. Then, select the green check box.



# **Counter Sales** (for a Walk-In Customer)

4 Once in the Counter Sale account, select the **"Sale"** button, at the bottom of the screen.

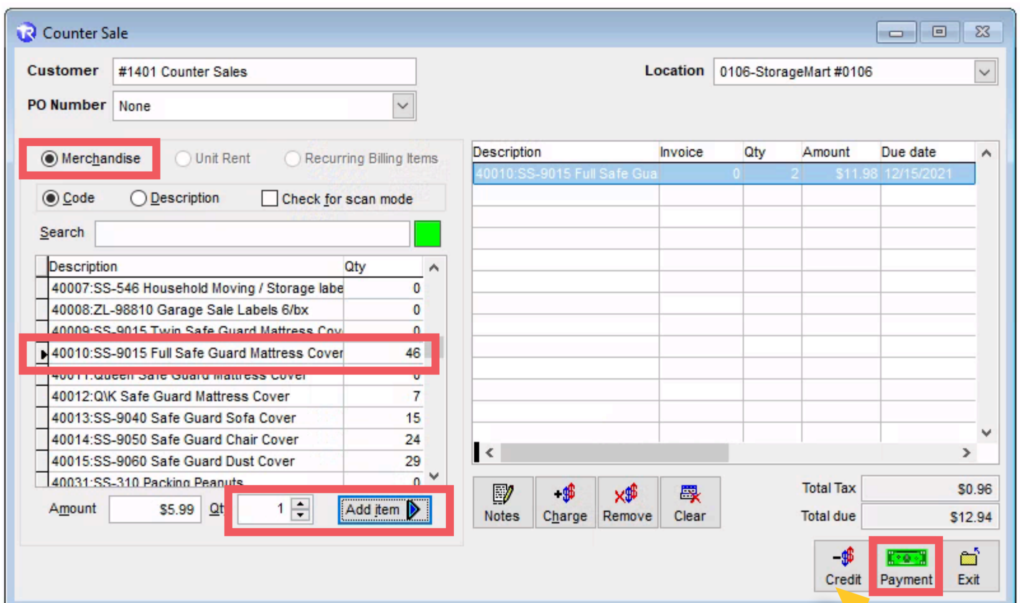



5

Now, select the bubble next to **Merchandise,** followed by the merchandise the customer is purchasing.

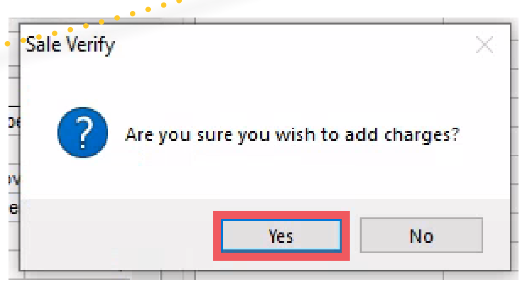
Then, select the item amount and click **"Add Item".**

If there is a "0" in the "Qty" column, this item is not available to add.




6 Once confirmed, click **"Payment".**

Then, "**Yes,**" in the pop up box.



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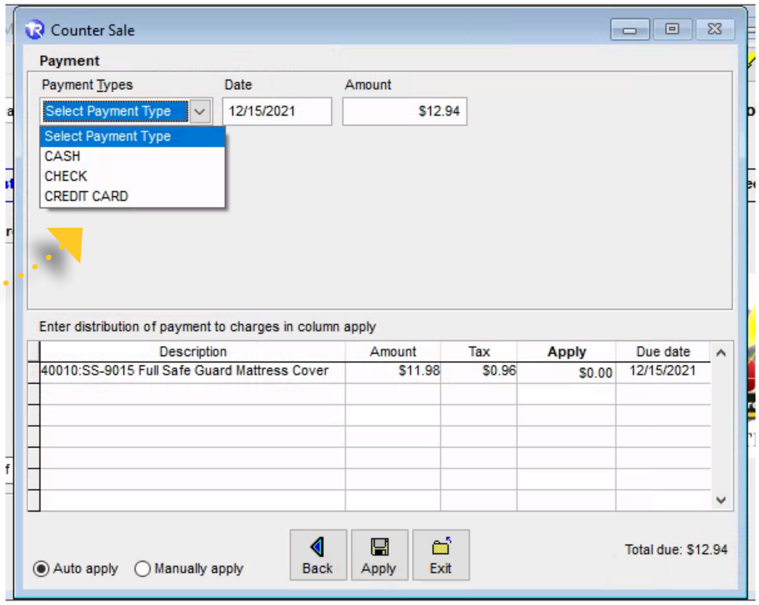
7 Click the **Payment Types** drop down menu and select the payment type.

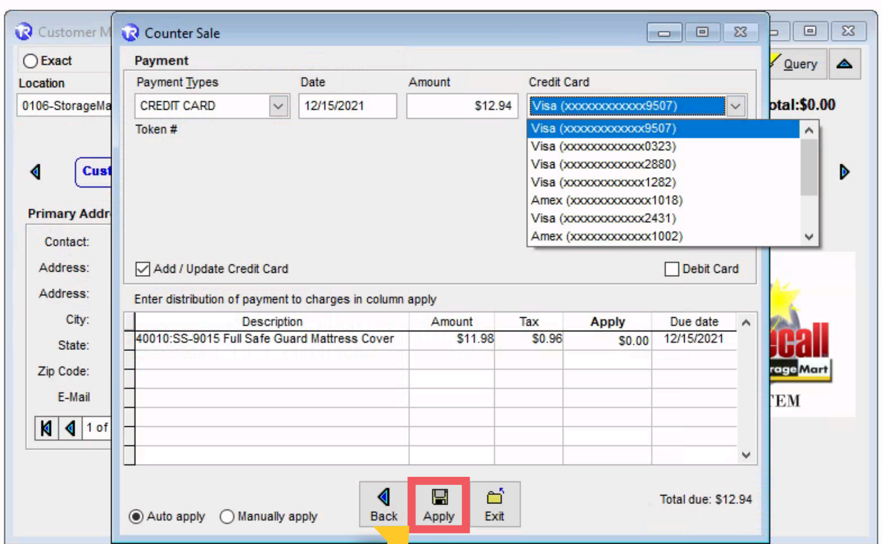



Note: **DO NOT** save the card number info in our system for a walk-in, counter sale customer.

8

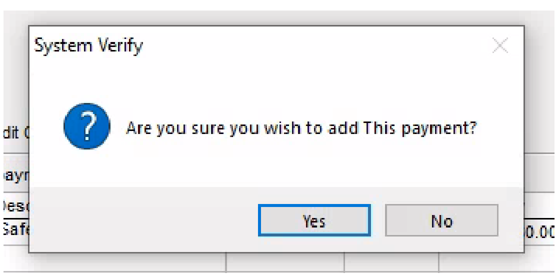
For this example, we will select **CREDIT CARD.**

Select the correct card type, insert the card into the Pin Pad, and select **"Apply".**




9 Then, click **"Yes"** on the pop up box to add the payment. Next, complete the process on the Pin Pad, then select **"Exit".**

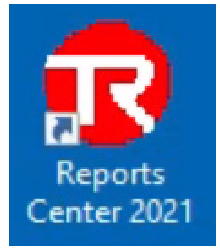
Now, select **"Yes"**, on your screen, to complete the box.



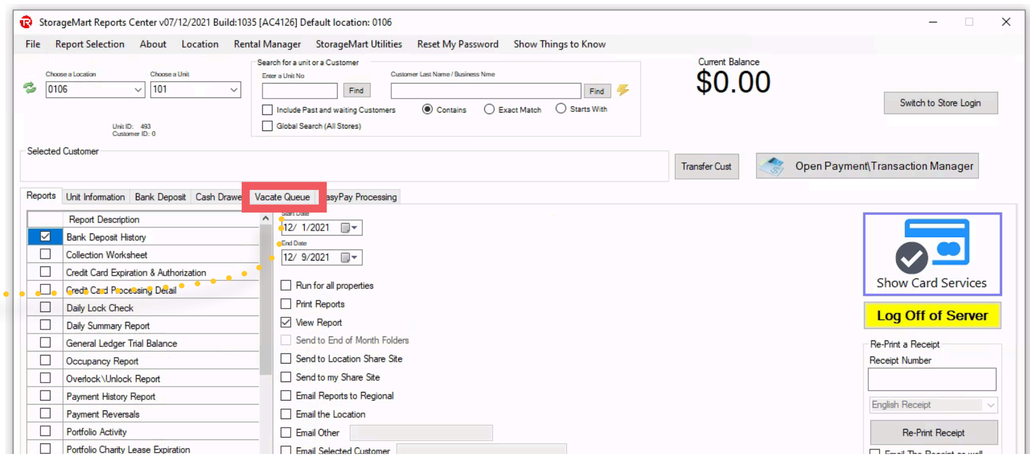

10 Email the receipt to the customer, unless otherwise requested. If the customer requests a printed receipt, print 1 copy of the receipt in the "**Print Receipt"** window. Click **"Exit"**, and you are done.

# Adding a Customer to the Vacate Queue

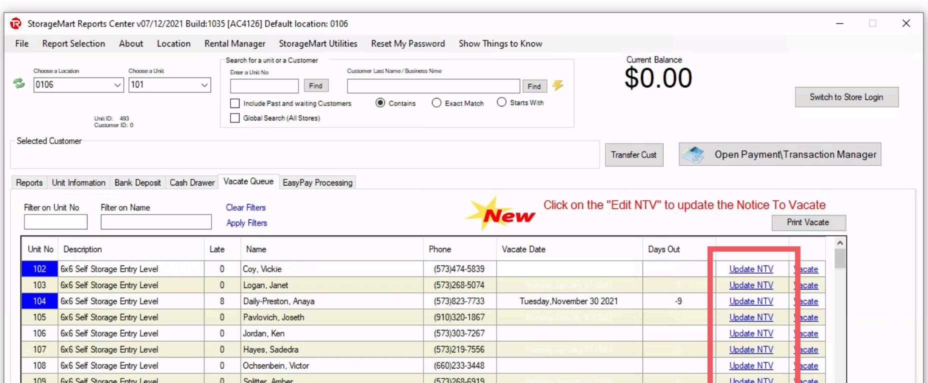
1 First, ensure you are logged into **Reports Center.**




2 Once in Report's Center, select the **Vacate Queue** tab.

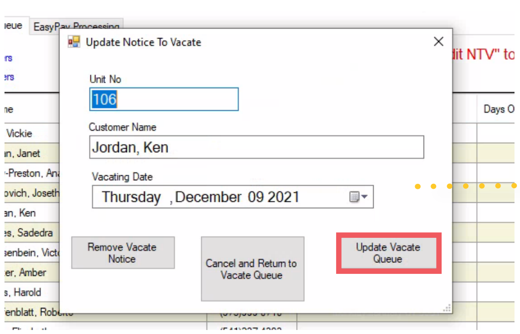



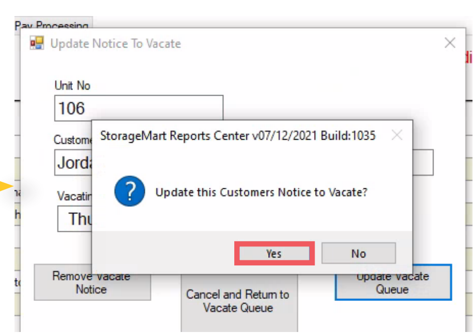

3 Click the **"Update NTV"** next to the customer you would like to add a vacate date to.





4 A window will pop up for selecting the specific move out date. Then, click, **"Update Vacate Queue".** In the pop up window, select **"Yes"** to complete the process.



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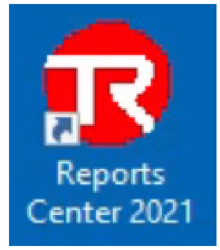
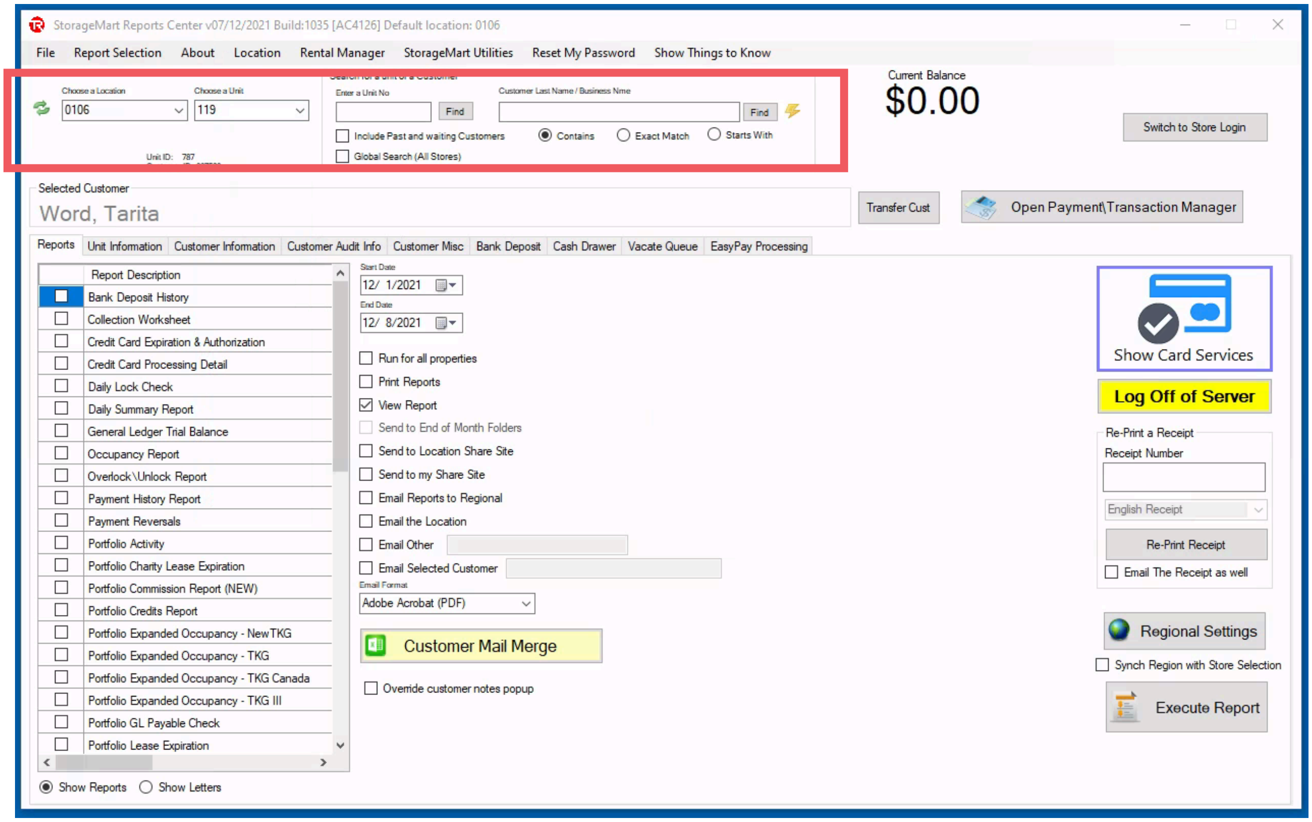
# Completing a Move Out

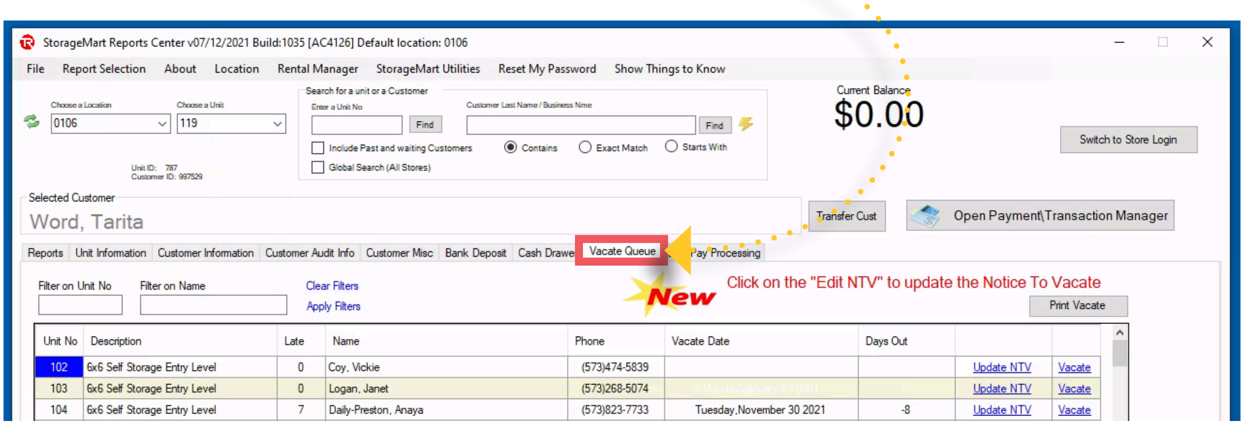
1 First, ensure you are logged into **Reports Center.**




2 **Then,** ensure that your location in the top left corner of the screen in correct.

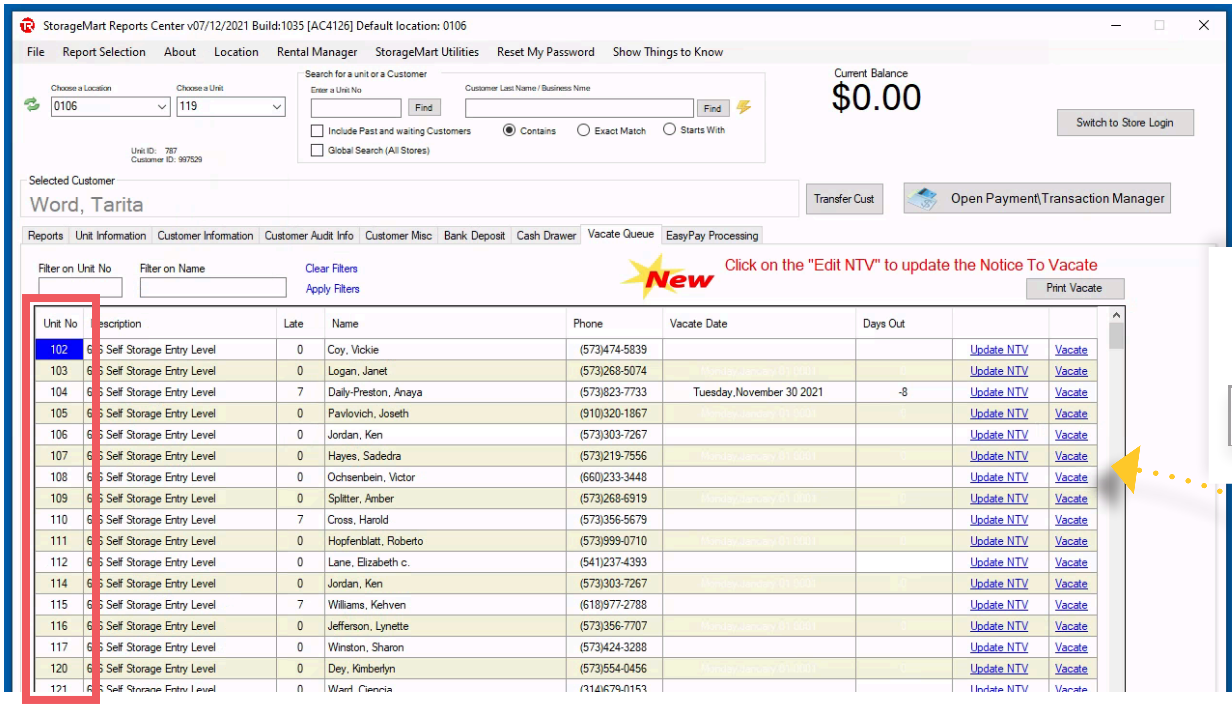


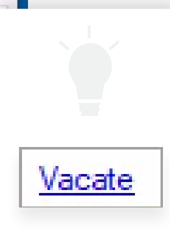

3 Once the account is pulled up, select the **"Vacate Queue"** tab.



# Completing a Move Out

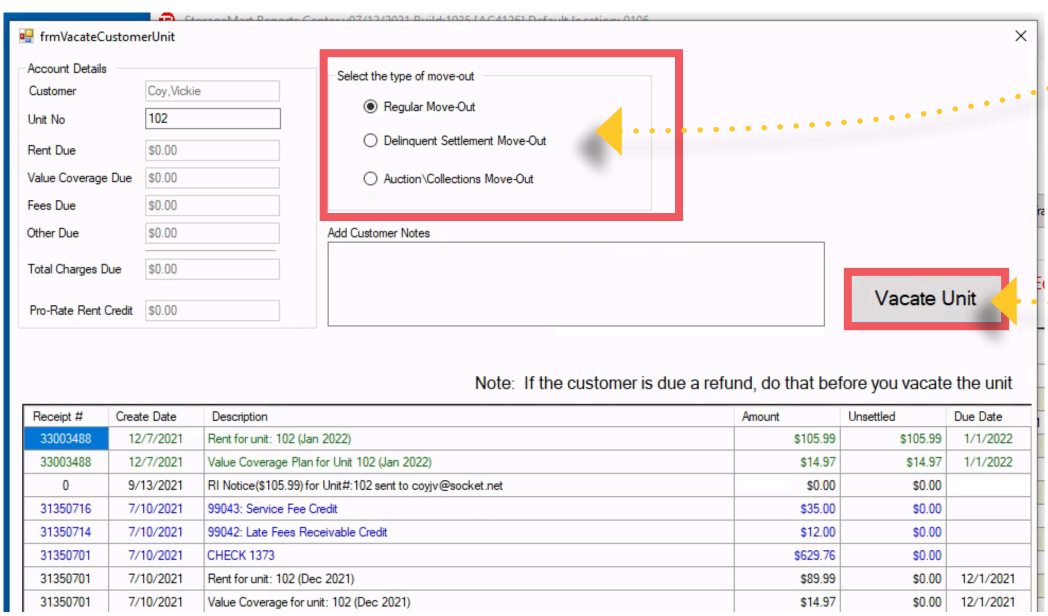
4 In the Vacate Queue, find the unit number you are vacating.




5 Once you have found the unit select the **Vacate** button to the right of the screen.

6 A window will appear with the customer and unit information.

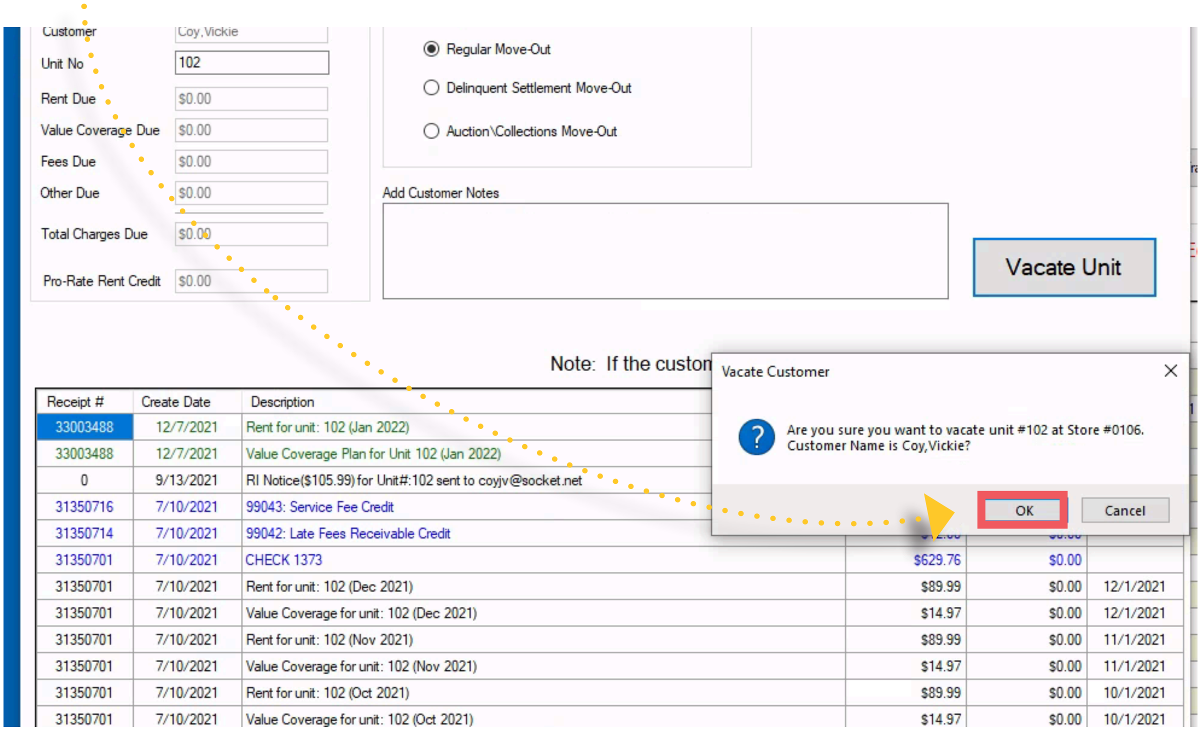



Make sure to select the **correct** type of move out.

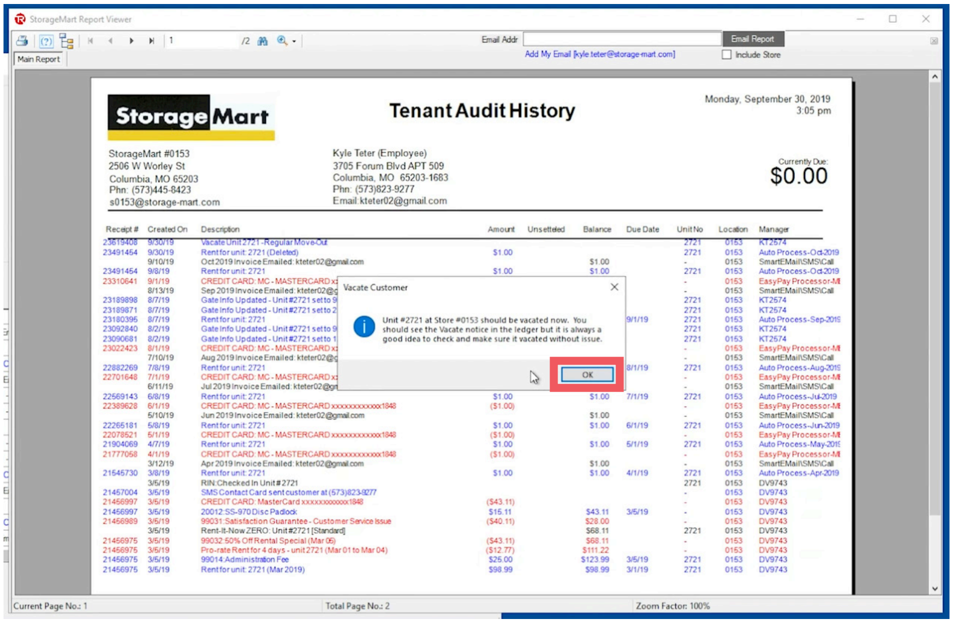
From here, select the **"vacate unit"** button.

# Completing a Move Out

7 Select OK, when the pop up box appears on your screen.



8 Select **"OK",** again, on the next screen.



## Final Daily Site Walk

1 Check on the cleanliness of the property.

2 Review status of all units.

3 Look for any debris and landscaping issues.

4 Look for facility and maintenance issues.

5 Create any notes on issues you found on site & follow up on them the next business day.

## **Closing Store** Tips

1 Clean the office.

2 Check the stock on merchandise in-store.

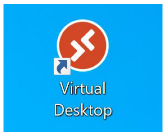
3 Turn off camera monitors and lights.
   - Excluding track lights

4 Lock the office door.

**REMEMBER,**
how you close determines how you open.

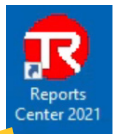
# **Petty Cash** Close

1 First, ensure that you are in **Virtual Desktop**

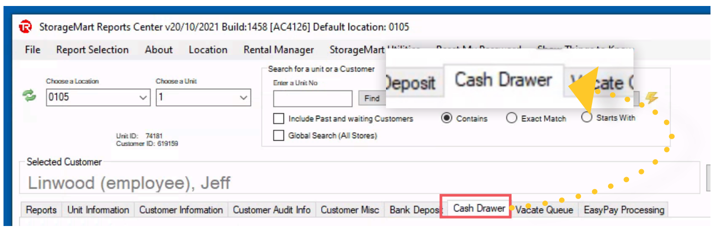



2 **Then,** log into **Reports Center.**

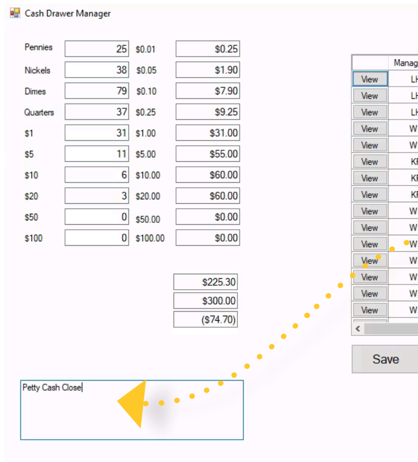
All petty cash funds must be counted and documented in Reports Center, each evening.




3 Next, select **cash drawer.**




4 Like opening, fill in the amount **counting piece by piece**.




For example, you counted 37 quarters, so we type in 37, in the box next to the word "Quarters", not $9.25.

Note: Add **"Petty Cash Close",** to the manager note section.

5 When drawer is balanced, select the "Save" button, and **print your cash drawer count and place it with your daily paperwork.**

# **Bank Deposits**

## 1 Four times to go to the bank:

- The 10th of the month
- The 22nd of the month
- The last day of the month
- Anytime you are over $1,000, in cash and checks combined

## 2 The Policy:

Every deposit must be made before 2 P.M.; no night deposits are allowed.

A validation stamp is required with or on the Deposit Slips.

A deposit at your local bank must occur on the last working day of every month, regardless of the amount.

All Deposit Slips must be filed with your daily paperwork.

## 3 Deposit Slips

On the day the deposit is made, Deposit Slips for the month must be scanned and emailed to **bank.deposit@storage-mart.com** from the store email address.

The subject must be titled:

"(Your Store Number)(Month)(Year)(Monthly Bank Deposit)"

For example: "0112 August 2021 Monthly Bank Deposit".

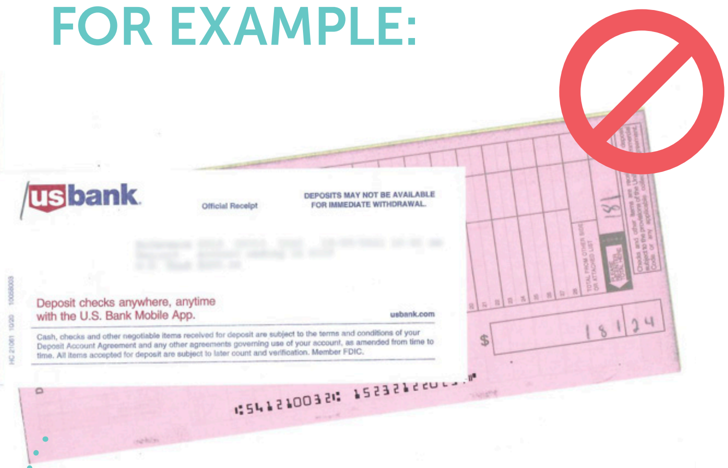
The document must be legible with the **validation stamp** visible.

If a scanner is unavailable, Deposit Slips **must be mailed to Home Office.**

# Reminders for Sending in Deposit Slips

**#1** When documenting and sending in deposit slips to bank.deposits@storage-mart.com **all deposit slips from the bank need to be visible.**

## FOR EXAMPLE:




These slips are overlapping, making for an **incorrect** submission.


Both slips are visible, this is a **correct** submission.

**#2** **Remember,** if you have an issue with bank deposits please create a **Help Desk ticket.**

**bank.deposits@storage-mart.com** emails

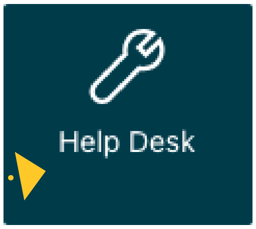
**ARE NOT CHECKED DAILY**

**#3** **YOU ARE NOT** to use petty cash funds **OR** personal funds in an attempt to correct a deposit.

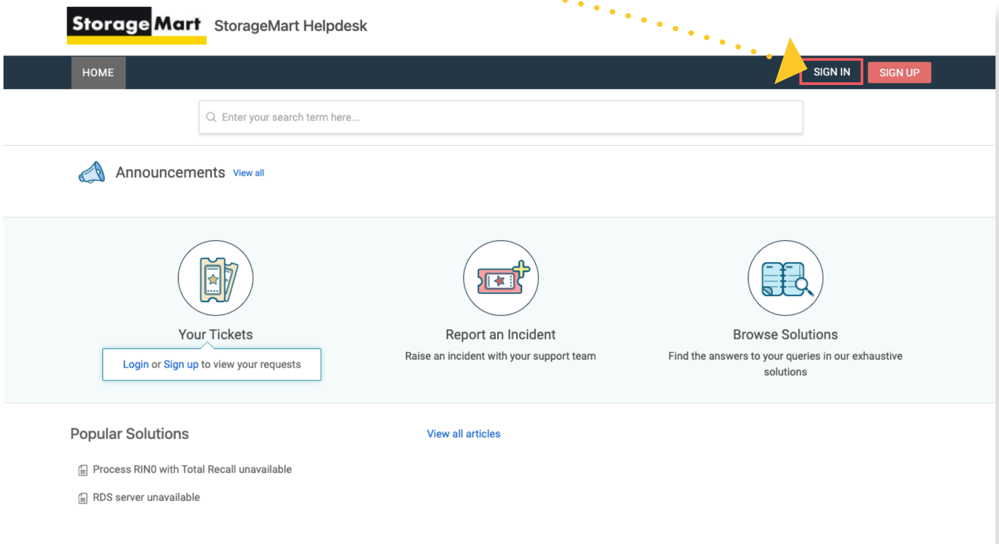
# **StorageMart** Help Desk

StorageMart's **Help Desk** is a ticketing system that allows you to contact each department for either technical help or various other issues.

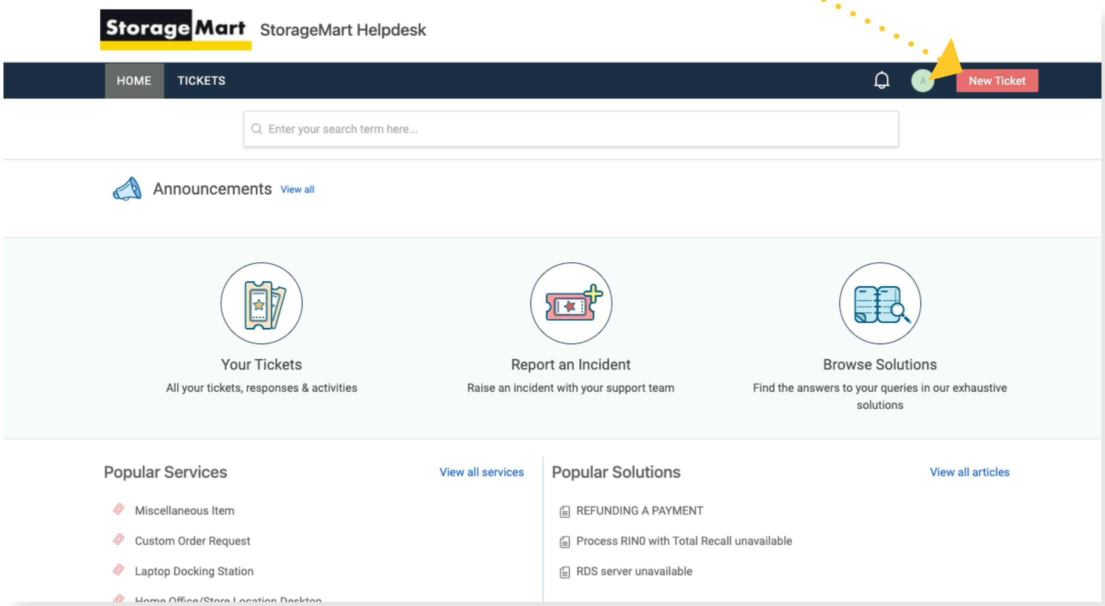
1 On StorageBook's homepage, select "**Help Desk**".



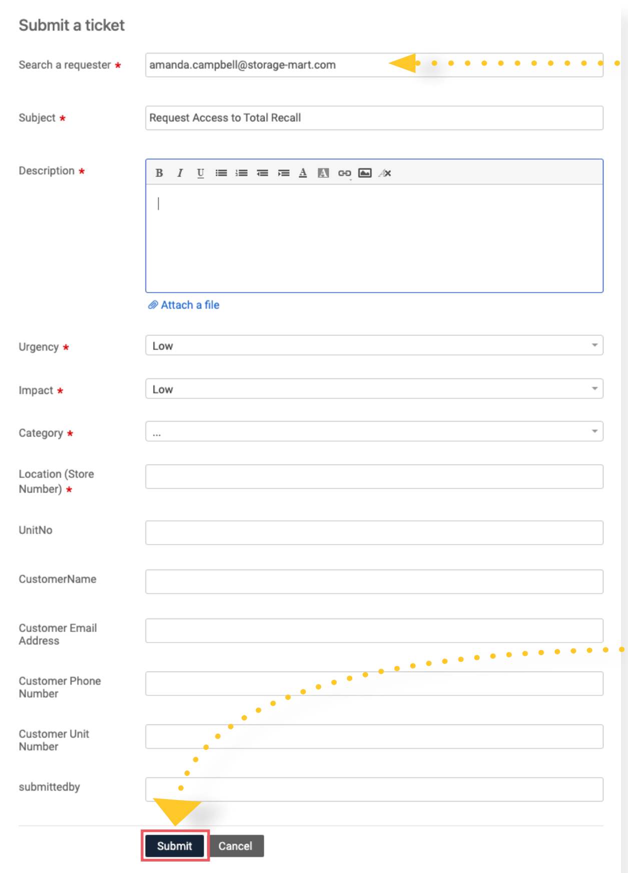

2 Next, select "**Sign In**".




3 Then, select the "**New Ticket**" button.



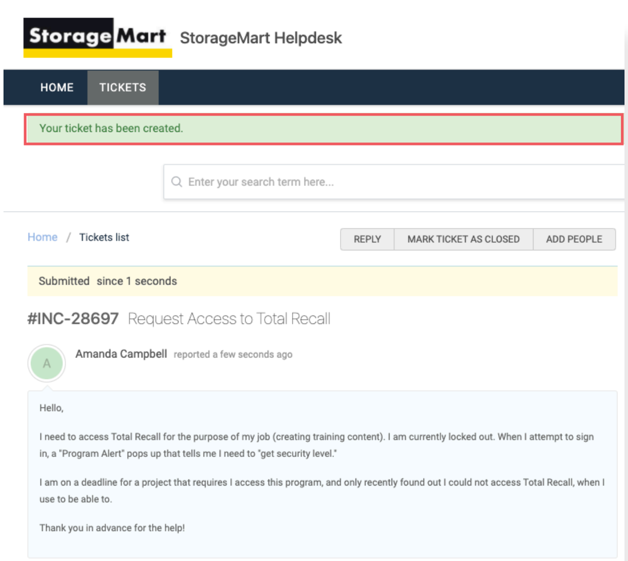
## 4 **Fill out the form**, ensuring you provide as much information as you can.



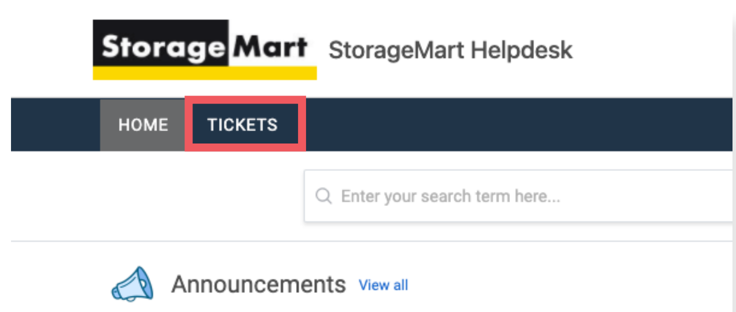

IMPORTANT: Use the "**Site Email**", when filling out the request form.

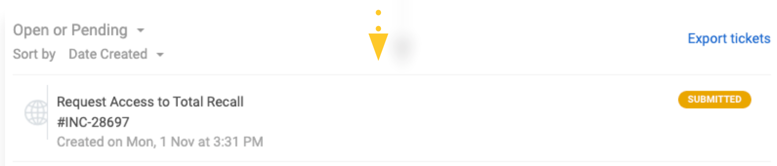
Once complete, remember to press "**Submit**" when you have completed the form at the bottom of the form.

## 5 You will be redirected to a confirmation page.




## 6 To view the status of your ticket(s), select **"Tickets"** on the top bar. You will see each ticket's status.



# **UKG** - Frequently Asked Questions

## #1

**Where can I find the UKG portal?**

**-** Through **Quick Links** in **Storagebook**


## #2

**Where can I find the time clock?**

**-** Under the **"Time Classic"** tab in the **Workforce Management** drop down menu.

## #3

**What if I need to reset my password?**

**-** Select **"Forgot your password"** on the home page of UKG. Then, follow the screen's prompts.

## #4

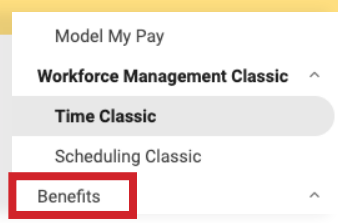
**How do I submit my time sheet?**


**-** Find **"My time sheet"** under the **"Time Classic"** tab. Select the **"Submit for approval"** button, on the bottom right corner of the time sheet.

## #5

**Where can I view my benefits?**

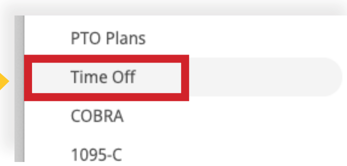
**-** Under the **"Benefits"** tab in the drop down menu on UKG's home screen.



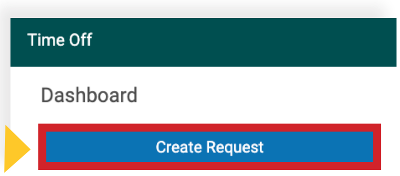

## #6

**Where can I view/request my time off?**

**-** Navigate to the **"Benefits"** tab and select **"Time Off"**, from the drop down menu.




Here you can view your **balances** and **create requests** for time off.

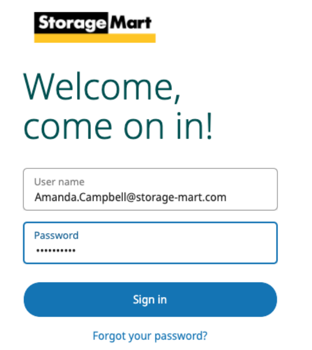


# **UKG** Signing In, Punching In/Out, Breaks & Lunch

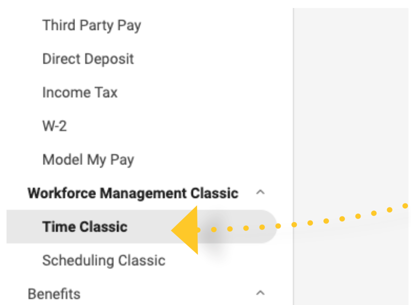
1 First, ensure you are logged into **StorageBook.** Then, select **UKG.**


2 **Next,** fill in your username and password and select sign in.

**(S.M. email address + personal S.M. password)**




3 Once **signed in,** select "**Time Classic**," under **Workforce Management Classic.**




4 You will be redirected to your **time clock**, where you will **check in...** Check In

...or **check out** for the day. Check Out

You will also see the options to **"Start Break,"** and **"Start Meal".**

# **Voicemail & Transfer** on RingCentral Telephone

## Checking VOICEMAIL

1 **First,** select message button (Click here)

2 **Next,** enter your PIN.

**Ex. store #0105 = 01050105#**

Note: the voicemail **PIN** is the store number **twice,** followed by the pound sign **(#).**

3 **Then,** follow the machine prompts to...

**LISTEN, SAVE** and **DELETE** messages

## TRANSFERRING

1 Press **transfer** button during your call.

2 **Next,** dial the extension or number to transfer the call.

3 **Then,** press the "**Send**" key to connect the call.

StorageMart **Guidebook**

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Any questions, please contact the Training Department
at _trainingdepartment@storage-mart.com

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