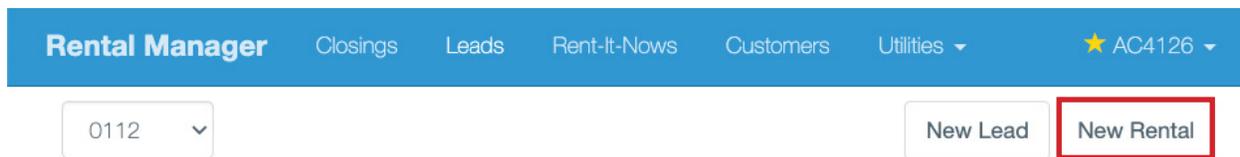


E-Signatures & Paperless Rentals

In this guide, you will learn StorageMart's process for **Walk-In Paperless Rentals**.

Part 1: MIM Module (Walk-In)

1 First, select "New Rental," on the far right of the screen of Rental Manager.



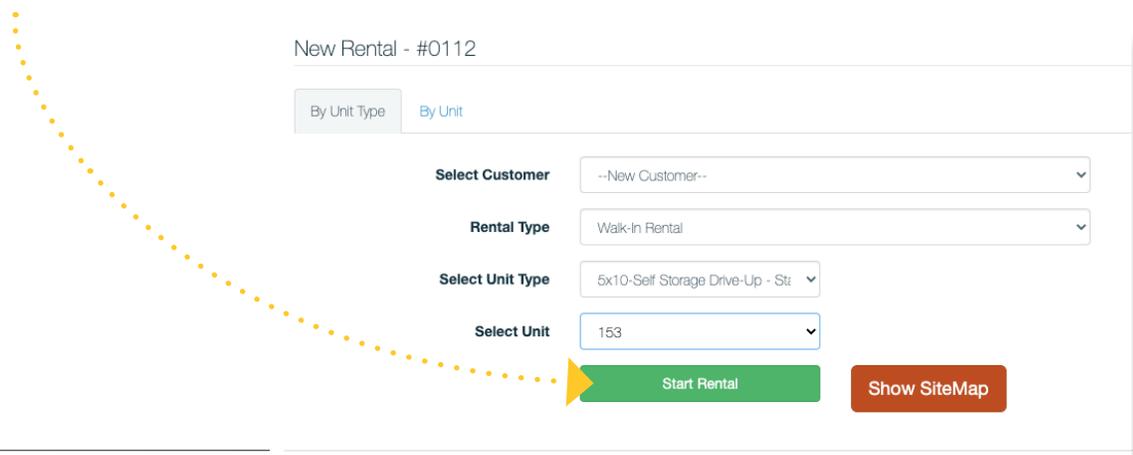
If the customer is already a lead, find the customer in the system, select "Details",



and then, "Rent Unit".



2 Complete the **New Rental** form with the customer.
Then, click "Start Rental."

A screenshot of the 'New Rental - #0112' form. The form has two tabs: 'By Unit Type' (selected) and 'By Unit'. Below the tabs are four dropdown menus: 'Select Customer' with '--New Customer--', 'Rental Type' with 'Walk-In Rental', 'Select Unit Type' with '5x10-Self Storage Drive-Up - Str', and 'Select Unit' with '153'. At the bottom of the form are two buttons: a green 'Start Rental' button and a red 'Show SiteMap' button. A yellow arrow points from the 'Start Rental' button back to the 'Start Rental' button. A yellow dotted line starts from the top left of the form and curves down to the 'Start Rental' button.

3 You will be taken to a page to **fill in** the customer's details.

Account Type
Personal

First Name
Amanda

Last Name
Campbell

Address
215 N Stadium Blvd

Address 2
Address 2

Zipcode
65203-1160

State
Missouri

City
Columbia

Landline Phone

Cellular Phone
 (573)449-0091

Email Address
amanda.campbell@storage-mart.com

Tax Exempt
 Tax Exempt Number

Birthdate
11/12/1993

Gender
Female

Move-In Date
11/11/2021

StorageMart #0112
4000 S. Providence Rd
Columbia, MO 65203

MOVE-IN KEY: 0112-167079
VERSION 14102021 R1555

UNIT INFORMATION

Rental Type: Walk-In Rental

Type: Self Storage Drive-Up

Size: 5x10

Pricing: Standard

Rate: \$79.99

Due Today: \$78.33

Unit No.: 153

Discount: No Discount

Move-In: Thursday, November 11, 2021

CUSTOMER INFORMATION

Name: N/A

Address: N/A

Phone:

Email: N/A

CustomerId: 0

Next

Ensure the customer uses a **Mobile Phone Number and Email Address** they can access right away when filling out the customer's rental paperwork



➤ Then fill in the **Secondary Contact Information** page.

Secondary Customer Information

StorageMart #0112
4000 S. Providence Rd
Columbia, MO 65203

➤ Enter the **Gate Code** information and add an **authorized user**. By now your customer's information has been saved to Total Recall.

Access Control Interface

StorageMart #0112
4000 S. Providence Rd
Columbia, MO 65203

➤ Then, select the customer's Value Coverage Plan.

Value Coverage Plan Options

StorageMart #0112
4000 S. Providence Rd
Columbia, MO 65203

➤ Finally, select any applicable inventory and click next.

Inventory Items

StorageMart #0112
4000 S. Providence Rd
Columbia, MO 65203

4 Now, confirm the all the details, take the payment, and select "Complete Rental".

	Amount	Tax	Total
RENT			
Rent for unit: 153 (Nov 2021)	\$79.99	\$0.00	\$79.99
Pro-rate Rent for 10 days - unit 153 (Nov 01 to Nov 10)	-\$26.66	-\$0.00	-\$26.66
Rent Total	\$53.33	\$0.00	\$53.33
VALUE COVERAGE PLAN OPTION			
Value Coverage Plan for unit: 153 (Nov 2021)	\$0.00	\$0.00	\$0.00
Value Coverage Plan Total	\$0.00	\$0.00	\$0.00
MISCELLANEOUS			
Administration Fee for unit: 153	\$25.00	\$0.00	\$25.00
Misc Total	\$25.00	\$0.00	\$25.00
Totals	\$78.33	\$0.00	\$78.33

Summary

Total Savings: \$26.66
Recurring Month Charge: \$94.96
TOTAL PAYMENT DUE: \$78.33

Payments ADD PRE-PAID MONTH(S) 0

Payment Method: Cash Amount: 78.33

Complete Rental

Note: If the move-in does not process, Press F5 to refresh the page in case there was some error when the page loaded

StorageMart #0112
4000 S. Providence Rd
Columbia, MO 65203

MOVE-IN KEY: 0112-167079
VERSION 14102021 R1555

UNIT INFORMATION

Rental Type: Walk-In Rental
Type: Self Storage Drive-Up
Size: 5x10
Pricing: Standard
Rate: \$79.99
Due Today: \$78.33
Unit No.: 153
Discount: No Discount
Move-In: Thursday, November 11, 2021

CUSTOMER INFORMATION

Name: Amanda Campbell
Address: 215 N Stadium Blvd
Phone: (573)449-0091
Email: amanda.campbell@storage-mart.com
CustomerId: 989699

Back

Part 2: Document Manager

1 On this screen you will send the customer their lease to eSign.

Sending the lease via Mobile SMS "text" is the preferred method.

➤ You **MUST** ask for explicit consent to send the customer their lease via Mobile SMS.

Once you have selected how you will send the documents for eSignature, click

Send Documents.

Document Manager

Would you like to send a digital lease to this customer for signing? If not, just click next to continue with the last steps of the rental process.

How will we send the documents for eSignature?

Email Documents to monte.ellis@storage-mart.com

Mobile SMS to (573)424-4725

Send Documents

StorageMart #0105
2403 Rangeline St
Columbia, MO 65202

MOVE-IN KEY: 0105-192960
VERSION 22032022 R1711

UNIT INFORMATION

Rental Type: Advanced Rental
Type: Self Storage Drive-Up
Size: 5x10
Pricing: Economy
Rate: \$56.99
Due Today: \$47.39
Unit No.: 148
Discount: No Discount
Check-In: Tuesday, March 22, 2022

CUSTOMER INFORMATION

Name: Monte McTest
Address: 10220 SW 25th St
Phone: (573)424-4725
Email: monte.ellis@storage-mart.com
CustomerId: 1078453

Next

2 This is the email the customer **NEEDS** to open to be able to sign their lease if **E-MAIL** has been selected.

Welcome to StorageMart! - Your rental documents are ready to sign - Unit #153



StorageMart <no-reply@email.storage-mart.com>

To: Amanda Campbell

StorageMart

Sign your Rental Agreement
Your rental is almost complete!

Click "View and Sign Documents" below sign your rental agreement and complete your rental.

View and Sign Documents

Account Details
Unit #153
5x5 Self Storage Drive-Up
Amanda Campbell
215 N Stadium Blvd
Columbia, MO 65203-1160

StorageMart
4000 S. Providence Rd, Columbia, MO 65203
(573)442-0811

This is the text message the customer **NEEDS** to open to be able to sign their lease if **Mobile SMS** has been selected.

Welcome to StorageMart!
- Your rental documents are ready to sign for Unit #153. Click the link below sign your rental agreement and complete your rental.

<https://docs.storage-mart.com/sign?r=618e9ffecc516142e98ebc51>

3 The customer will now need to sign their lease agreement on **their mobile device**.

1 STORAGE MART VALUE COVERAGE AGREEMENT - US

A JURY TRIAL. YOU ARE ALSO GIVING UP YOUR RIGHT TO PARTICIPATE IN A CLASS-ACTION OR OTHER COLLECTIVE ACTION LAWSUIT OR ARBITRATION.

Yes, I accept and agree to the terms of this Agreement.

Click to Sign

Customer Signature
StorageMart

Owner Signature
SMARTCO TRS, INC.

Signature

You need to complete 2 required fields.

Start



2 MISSOURI SELF-SERVICE STORAGE FACILITY RENTAL AGREEMENT

Rotate screen to sign

You need to complete 2 required fields.

Start



3 app.pactsafe.com

Clear Type Draw Change Font Done Signing

Amanda Campbell

The customer needs to **click the box to sign**.

The customer **can only sign their lease agreement** with their phone in **landscape orientation**. See **Page 9** for the **Orientation Guide**.

4 MISSOURI SELF-SERVICE STORAGE FACILITY RENTAL AGREEMENT

LIENHOLDER OR SECURED PARTY _____

LAST KNOWN ADDRESS: _____

IN WITNESS WHEREOF, the parties hereto have executed this agreement on the date first above written

StorageMart "OWNER" SIGNATURE:
StorageMart

Amanda Campbell "CUSTOMER" SIGNATURE:
Amanda Campbell

You need to complete 1 required field.

Next



5 STORAGE MART VALUE COVERAGE AGREEMENT - US

GOVERNING LAW AND RULES: The arbitration must be brought within the time set by the applicable statute of

Rotate screen to sign

You need to complete 1 required field.

Next



6 app.pactsafe.com

Clear Type Draw Change Font Done Signing

Amanda Campbell



The customer will follow the green button until they get to "Agree".

7 11:15 AM 100%
app.pactsafe.com

STORAGE MART VALUE COVERAGE AGREEMENT - US

Yes, I accept and agree to the terms of this Agreement.

Amanda Campbell

Customer Signature
StorageMart

Owner Signature
SMARTCO TRS, INC.

Signature

By clicking "Agree", you are indicating that you understand and agree to MISSOURI SELF-SERVICE STORAGE FACILITY RENTAL AGREEMENT, and STORAGE MART VALUE COVERAGE AGREEMENT - US

Agree

4 Once you have sent your documents to the customer, you will see a series of pop-ups stating the following:

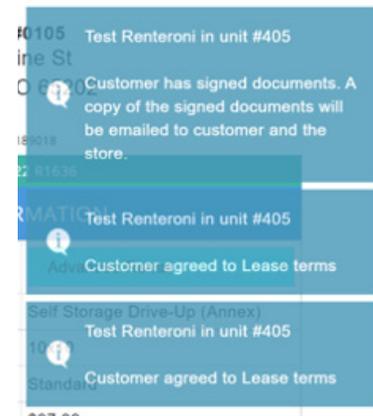
➤ **“The documents have been sent to the customer to digitally eSign.”**



➤ **“The customer is viewing the documents.”**



➤ **“The customer has eSigned all portions of the digital lease.”**

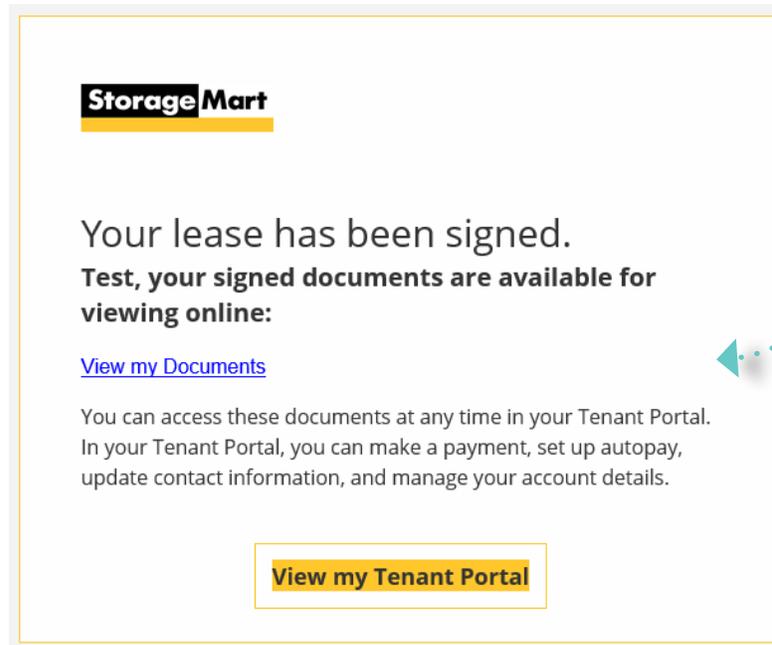


After the customer signs their lease and receives their confirmation email you will continue to click **“Next”** to complete the rental process.

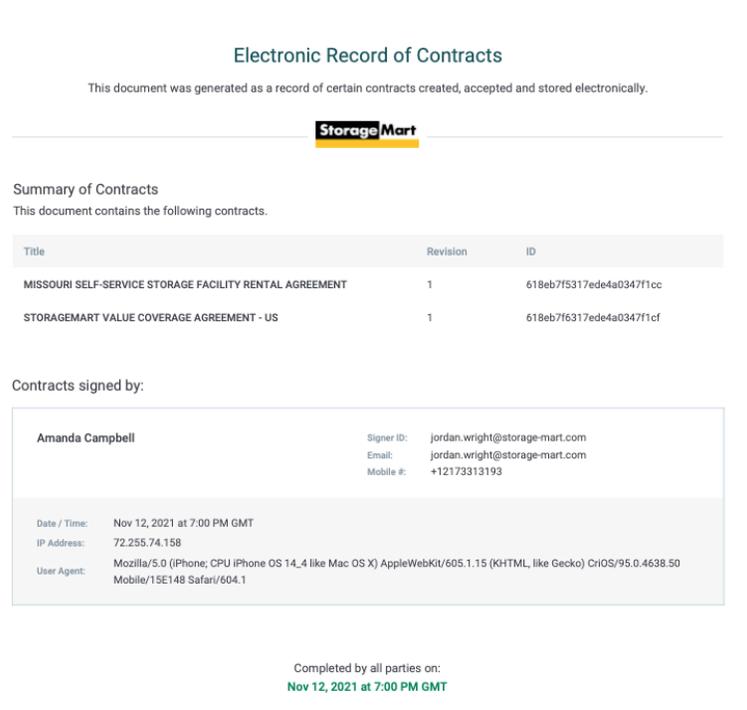


Part 3: Final Steps

- 1 The customer will receive this email with their **signed documents**.



- 2 The manager will receive this email, with the customer's **signed documents** and will need to print and store page 1 of this document in the customer's file.

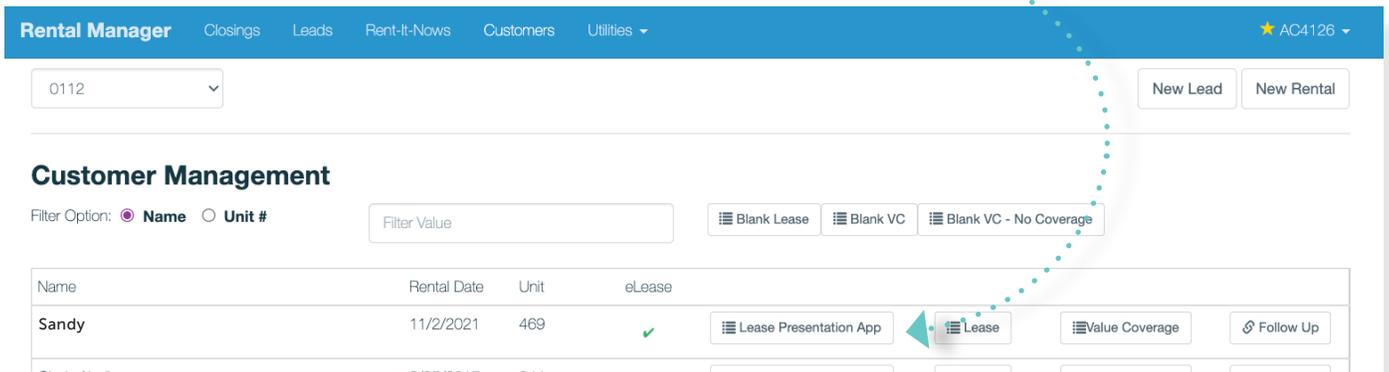


Part 4: Troubleshooting Lease Errors

1 If the customer needs to update lease information after their initial lease signing, you will need to go to the **"Customers"** tab in Rental Manager and re-issue the contract.



2 Find your customer, and select the **"Lease Presentation App"** button next to their name.



3 Now, edit the customer information as needed.



Remember, you must select **"Save Changes"** before sending the corrected lease to the customer to sign.

Document Presentation

Location: 0112, Unit No: 469, GateCode: 123456, Check-In Date: 11/02/2021, Monthly Rate: \$117.99

Value Coverage Plan: No Value Coverage, Communication Type: E-mail (selected), Mobile SMS

Primary Contact Information: Last Name: Sandy, First Name: [blank]

Account Type: Commercial (selected), Personal

Email: storage@gmail.com, Primary Phone: (123)456-7891, Cellular Phone: (789)654-3211, DOB: 01/01/1900, Gender: Female

Address: 123 E Storage Drive, City: Columbia, State: Missouri, Postal Code: 65203-9336

Tax Exempt: [checkbox] Tax ID Number, Email Invoice: [checkbox]

Active Military: [checkbox], Commander Name: [blank]

Military Unit Address 1: [blank], Military Unit Address 2: [blank], Military Unit City: [blank]

Military Unit State: Select State, Military Unit Postal Code: [blank]

NOTICE: You must save any changes to this form before sending for signature or printing. Otherwise those changes will not be reflected in Total Recall or any document.

Clear Cache

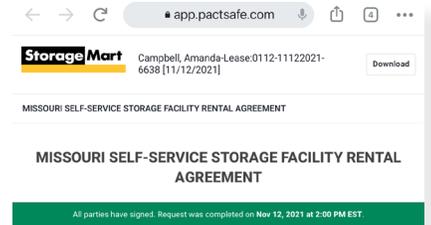
Orientation Guide

iPhone

1. Swipe **up** from the bottom of your screen to open Control Center.

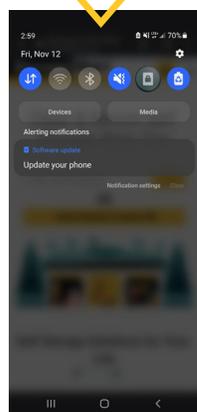
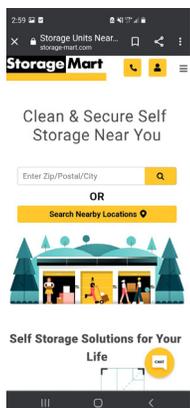


2. Tap the **Portrait Orientation** Lock Button to make sure that it's off. Turn your phone sideways.

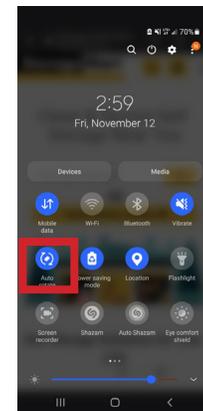
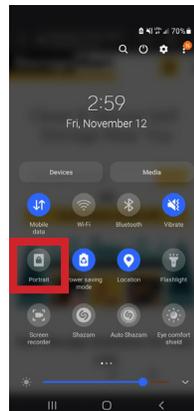


Android

1. Swipe **down** from the top of your screen to open the Notification Panel.



2. Tap the **Portrait** to switch to **Auto Rotate**.



3. Turn your phone sideways.

