



Modern Storage Executive

Modern Storage Executive was created to...

1. Fill a need in the industry for software with reliable accounting, flexible reporting and full support for the weekly rental system.
2. Provide more analytical functions for analyzing the wealth of historical data our customers have collected over the years.
3. Automate as many day-to-day operations as possible, leaving the staff available for other duties, and reducing staffing requirements.
4. Make the simplest, most concise self-storage management system on the market – keeping the amount of time required for a new user to learn the system to an absolute bare minimum.
5. Provide maximum control to facility owners and managers in terms of system and user security.
6. Give maximum control to those who are managing multiple facilities at a distance.
7. Allow facilities currently using the monthly system to fully realize the potential of the weekly system.

This brochure will introduce you to our system and outline all of the features that make *Modern Storage Executive* the best solution for your facility. If you have any questions, feel free to give us a call – our representatives will be happy to answer them for you.

Our commitment

Our customers are our first priority. If you need a feature that we don't have, want custom modifications tailored to your business needs or just need another report, we're here for you! Just call us, and we'll be happy to discuss your requirements. No other vendor offers this level of flexibility.

Benefits

The benefits of using *Modern Storage Executive* are numerous, but here are some of the most important:

- ❖ The latest features, the latest technology
- ❖ High speed data access
- ❖ Full Internet and Windows XP support
- ❖ Flexibility (in both operation and reporting)
- ❖ Accurate accounting
 - Accrual-based A/R accounting.
 - No transaction is ever removed from the transaction history. Reversals simply enter countering transactions. This ensures that no data is ever discarded.
 - Automatically charges rent, late fees (scheduled and cyclical) and insurance
 - Automatically generates late letters and invoices
 - Handles surcharges and discounts on an individual unit basis
 - Supports the following payment types: credit cards (VISA, MC, Amex, Discover, etc.), cash, cheques, debit cards, EFT and Internet payment
 - Discounts can be automatically removed by the system on a specified date
 - Pricing is on a per-unit basis for maximum flexibility
 - Supports Daily, Weekly, Monthly and Yearly charge periods
 - Any-day billing
 - Customers can switch between charge periods at any time (pro-rated)
 - Multi-rate pricing – each unit can have a different daily, weekly, monthly and yearly price
 - Multiple rental unit types including indoor, outdoor, parking, RV Parking, boat slips, boat racks, cold storage, mailbox, warehouse and offices. Should you require new types, we can easily add them.
 - Unprecedented tax flexibility. Unlike other systems which require updates to keep up with tax rates and rules, *Modern Storage Executive* offers a completely user-configurable tax system.
 - Unlimited number of user-defined taxes
 - Configurable rate
 - Configurable applicability (rent, insurance, services, products)
- ❖ Historical Integrity. No historical financial or customer data is ever completely deleted from the system. Normally, keeping such a large volume of data would slow down the system over time, but *Modern Storage Executive* simply moves redundant data to an overflow database. This method enables all historical information to be kept indefinitely without compromising system performance.

- ❖ Scalable architecture
 - *Modern Storage Executive* uses a custom data abstraction layer, which makes it simple for us to switch to alternate database interface technologies if necessary. At present, we support Microsoft ADO (default interface), ODBC, Borland BDE and direct Microsoft SQL Server.
 - Transactions. All database accesses are grouped into logical transactions, thereby ensuring that all operations that are part of a given function (e.g. payment) will be posted to the database, or the entire transaction is cancelled. This ensures data integrity in the event of a hardware/power failure.
 - Multiple sites can be operated from a single computer
 - Multi-site operation via Microsoft SQL Server via... Local Area Network (LAN), Wide Area Network (WAN – Leased line, ISDN, DSL, Satellite, modem), Internet or dial-up VPN. When using WAN/Internet linkup with MS SQL, any site can be administered from any location. All sites can be administered from a centralized head-office.
 - Multi-site operation via Microsoft Terminal Services
 - *Modern Storage Executive* was developed with Microsoft Windows 2000 Server Terminal Services in mind.

Basic Features

- ❖ Move-in
 - Support for configurable 6/12 month discounts
 - Inventory sale can be made during move-in
 - Inventory sale details included on single receipt
 - Supports security deposits
 - Prints receipts and use agreements
 - Post-dated move-ins – you can move a customer in, take their initial payment, print a contract, and have *MSE* begin charging rent on a date you specify
 - Can invoice the initial payment rather than requiring it up-front (great for corporate/government customers)
- ❖ Move-out
 - Supports reversal of last period's rent (for leniency on customers who are overdue when moving out; configurable)
 - Supports prorated refund of charged rent
 - Bailiff move-out feature automatically reverses late fees and records move-out as a bailiff sale
 - Security deposits can be applied to final amount due (configurable)
 - Prints receipt, customer financial history, complete details and customers ledger notes for filing

- ❖ Payment
 - Customer can pay for 6/12 months and receive configured discount
 - Tracks customers' cheque numbers for easy backout in case of NSF
 - Payments can be made on multiple units simultaneously
 - Inventory sales can be made on every payment
 - Customer financial history available from payment screen
 - Insurance information can be changed during payment (configurable)
 - Automatically removes overlock for delinquent customers paying at least full amount due

- ❖ Backout – allows charging back of NSF cheques/declined credit cards/bounced EFT, etc. + bank fees + service fees, etc.
 - A list of all cheques the customer has issued is also shown, along with cheque numbers, to reduce errors and increase productivity.
 - Prints NSF letter to mail to customer

- ❖ Insurance Adjustment – allows users to change customers' insurance rates between periods.
 - Charged insurance is pro-rated and refunded, and then charged back at the new rate.

- ❖ Prorate feature
 - Allows the user to change the customers' rental type (daily, weekly, monthly) and alter their paid-to date at the same time.
 - Charged rent is pro-rated and refunded, and then charged back to the selected date.
 - Also useful for converting customers between weekly/monthly systems.

- ❖ Add Charge – A new charge can be added to a customer's account at any time, simply and easily with this option.

- ❖ Unit Transfer – Move customers between units simply and easily with the *Modern Storage Executive* Unit Transfer feature.
 - Charged rent is pro-rated, the customer is moved into their new unit, and the new unit is then pro-rated and charged up to the same date. This makes upsizing simple, and means a transfer from one size to another is as simple as a small adjusting payment.
 - Charged insurance is also pro-rated.
 - The process is as simple as picking the source and destination units, and then performing a payment.

Advanced Features

- ❖ Reversal System – a feature unique to our software! In case of operator error, *Modern Storage Executive* permits reversal of almost all important system functions. Reversals are carefully logged, so you don't have to worry about anyone reversing something undetected. Reversal completely restores the customer and unit back to their previous states.
 - Everything is reversed, including;
 - Transactions are given countering transactions (but not erased!)
 - Inventory quantities and totals are restored
 - Receipts are reversed
 - Customer and unit information is restored
 - Gate codes are restored (for move-outs)
 - Move totals are restored
 - Features that can be reversed include:
 - *Move-in*
 - *Move-out*
 - *Payment*
 - *Backout*
 - *Add Charge*
 - *Unit Transfer*
 - *Balance Transfer*
 - *General Adjustment*
 - *Rental Type/Date change*
 - *Merchandise Return*
 - *Insurance Adjustment*, and more!
 - Like all *Modern Storage Executive* features, access to the Reversal System can be controlled on a per-user basis.

- ❖ Ledger system. Provides a place for users to enter notes about each customer.
 - The system tracks each individual entry in the ledger separately, including date and time written, and the author.
 - Notes can be purged by date should the database grow too large.
 - It is also possible to print the ledgers by date for all customers.
 - This allows you to see all of the ledger activity on a day-by-day basis. The advantage is that you can pro-actively ensure your employees are making delinquency calls.
 - Changes to phone numbers and customer names are automatically recorded in the ledger.

- ❖ Documents System
 - Enables users to create, print and mail merge their own custom documents
 - Full rich-text editor including fonts, styles, justification and cut & paste
 - Documents can be exported to, and imported from MS Word

- No more API codes to learn like older programs – *Modern Storage Executive* provides a pull-down list of all available fields that can be mail-merged and inserts them for you
- Simple mail-merge, just pick the customers and go
- Enables you to edit your own use agreement/contract and letters

- ❖ **Advanced Reporting System**
 - Uses Crystal Decisions' Crystal Reports for reporting, which is fully integrated into the program.
 - Creating your own reports is not overly complicated, and can be done using Crystal Reports. (License required)
 - Over 70 reports, with new ones continually being created which can be automatically installed via *Update Executive* over the Internet.
 - Reports can be viewed or printed, or viewed and then printed.
 - A copy of any report can be added to the Archive at any time.
 - All reports can be e-mailed directly from the program.
 - Many reports have drill-down features, which enable users to see the underlying data that composes the reports. This feature alone can save you hours of work. For example, if you view the Price Variance Report, and find that a given size has a unit that is extremely discounted, you can drill-down on that size, and immediately know which unit it is, rather than searching through the Unit Status Report or manually looking through the units.
 - Number of copies is independently selectable on each report.
 - All reports can be exported to Adobe Acrobat (PDF), MS Excel, MS Word, HTML (3.x and 4.x), text, Rich Text Format (RTF)

- ❖ **Report Package System.** A *Report Package* is a bundle of pre-defined reports that site staff can print by selecting a single menu option. This reduces workload and ensures that the site staff prints the correct reports.
 - An unlimited number of reports can be added to each 'package'
 - Packages can be printed, archived, or e-mailed
 - Reports included in Daily, Weekly and Monthly Close features are all *Report Packages* which can be edited and changed at will

- ❖ **Archive System.** The Archive System allows you to save copies of reports for later printing. Some reports can only report on current data (not historic), and this feature enables you to see what the state of a given report was on any date you wish.
 - Reports can be archived manually at any time by the operator
 - Report packages can be automatically archived by the charger at month's end
 - Other files (e.g. Word documents, Excel spreadsheets) can be saved to the archive for later retrieval and editing

- All archived reports are saved in Adobe PDF (portable document) format, which can be viewed and printed with the Acrobat Reader program (free from <http://www.adobe.com>). If the machine has the web option installed, reports can be viewed directly from the Internet with any machine that has Internet Explorer and Acrobat Reader installed. Reports can also be archived in RTF (Rich Text Format) if desired, although the best results are obtained with PDF.
- Reports contained in the archive can be easily printed or e-mailed.

- ❖ Inventory System
 - Supports fees as inventory items (e.g. administration Fee)
 - Items can be flagged as *Auto Add*. So, for example, the system can automatically add a Lock to the shopping basket on every new Move-in. (Or an admin fee can be added to every move-in automatically)
 - Tracks in-stock quantities, re-order amounts, month and year-to-date profits on a per-item basis
 - Unlimited inventory items
 - Merchandise Return feature enables customers to return unused inventory for a refund (configurable).

- ❖ Advanced Price Change.
 - Prices can be changed by unit, by size and by unit type
 - Prices can be changed immediately, on a specified date, when a customer becomes due, or when the unit is vacated
 - Surcharges/Discounts can be automatically removed when a new price takes effect
 - Options to only print letters/only change prices
 - Special on-line backup can be automatically performed before the price change is effected, thus protecting the user against accidental errors.

- ❖ Corporate customer support. This allows for using only the last name as a “Company Name” field to make various documents more professional. Eventually, a different delinquency system could apply to corporate customers.

- ❖ Company units. These units are never charged and don’t appear in statistical reports (such as *Unit Performance*, *Price Variance*, etc.), thus throwing off totals. These units are also immune from price changes.

- ❖ Late Fee System
 - Allows for up to 4 configurable late fees and letters
 - Additional configurable bailiff fee and letter
 - Support for cyclical late fees (e.g. late fees charged every X days after a customer has become delinquent)

- ❖ Customers can have multiple units without having to re-enter the customer's address/contact information for every unit.
 - To avoid confusion, a separate balance and history is maintained for each individual unit
- ❖ Multi-unit payments. One payment can be distributed to multiple customer units.
- ❖ Balance Transfer is simple and highly traceable. It will also set over/unlock, delinquency, and paid-to dates for both source and destination units depending on post-transfer balances.
- ❖ Payment receipts include information about charges since the customer's last payment + charges for this payment (e.g. # of weeks entered on payment screen) + inventory sale details on the same receipt (no more separate inventory sale receipts). More importantly, the charges and credits sections of the receipt always balance, thereby reducing customer confusion (and staff headaches), and providing a more readable yet accurate receipt than any other system.
- ❖ Pre-lease Overview. The *Modern Storage Executive* pre-lease/reservation system allows your employees to capture information about potential customers who have called to request units.
 - Users can move customers in directly from their pre-lease information, which allows for statistical tracking of conversion rates.
- ❖ Delinquency Overview. This overview acts as a central location where your employees can view delinquent customers, phone them, and enter the information they gather during that call into the customer's ledger.
 - Payments can also be made from the Delinquency Overview, should a customer decide to make a payment over the phone with his/her credit card.
 - Notes can easily be entered into the customer's ledger.
- ❖ Reminder Overview. Enables you to enter reminders into the system for pre-selected dates, and those reminders will pop-up on that day. Excellent for helping staff remember important events.
- ❖ Advanced User Security System. Instead of using security levels, each user can be given *security keys*, where each key controls access to a given system function. Utilizing this method, you can see at a glance which features particular users have access to.
 - Over 60 system functions can be granted or denied on a per-user basis
- ❖ Multi-site option. Allows the user to host multiple databases on a single system and switch between them with ease. This is an excellent feature for operators who manage two sites from a single location.

- ❖ New backup system.
 - Uses integrated high-speed industry standard PKZIP-compatible compression (no hassles with external programs)
 - Supports floppy, ZIP and Jaz disks, and USB storage devices (HDD/Flash)
 - On-line backup. In addition to the standard backup, a copy of the backup can be kept on the local hard drive, or on another network station. This provides an extra layer of protection against faulty backup media. The on-line backup can keep a copy of the last backup done, or up to seven days (and every month) worth of backups (transparently to the user!).
 - Automated backups. Both ZIP and On-line backups can be scheduled to occur late at night when nobody is using the system.
 - Internet Backup. The system can be set up to allow the user to send a backup to a remote FTP server. Once this feature is configured, it is completely transparent to the user.
 - Ultra easy-to-use – just click and go.

- ❖ Internal e-mail system.
 - Users can send each other e-mail, which allows staff to notify each other of important events – even if they never actually work on the same day.
 - The system can also send Internet e-mail, so there's no need for staff to learn how to use Outlook/Express for sending mail
 - Coming soon: Support for receiving Internet e-mail, eliminating the need for Outlook/Express and curtailing the chances of contracting e-mail viruses
 - Security and Access Interface. Complete security system integration with *Modern Access* equipment and other systems.

- ❖ Accounting Interface. *Modern Storage Executive* can export financial transactions to leading accounting systems.
 - Transactions from a given date range can be exported.
 - Transactions since the last export can be exported.
 - System can export all transactions during the specified period, or only a summary.
 - *Chart of Accounts* enables users to define a custom translation between internal *Modern Storage Executive* accounts and accounts in the external accounting system.
 - Supported accounting systems include;
 - Simply Accounting
 - QuickBooks
 - MYOB
 - Platinum
 - Great Plains
 - PeachTree
 - Timberline
 - NAVision
 - Comma Separated Values (CSV)