WinSen Property Manager
Site Customization Guide

Introduction

This Site Customization Guide provided with your WinSen Property Manager software, and its companion document, the **WinSen Property Sentinel Site Customization Guide**, consists of a series of forms which will need to be completed, detailing your Site Information, e.g., site name and address, days to overlock, late fees to be charged, unit sizes and rates, unit mix, etc. The information will be needed to customize the software for your facility. Please note that this information can easily be changed at any time after the initial setup.

The Site Customization Guide will assist you in gathering this required information and making certain key decisions as to how you will operate your facility with WinSen Property Manager. It is also a convenient place to store all of the necessary data.

Entering the information contained herein will normally be accomplished by Sentinel Systems Corporation. However, you may elect to input this information yourself. In either case, the **Startup** section at the back of the WinSen Property Manager manual will greatly assist you in the Site Customization and Startup process.

Section 1 - Site Name

This section defines basic information about your facility, e.g., name, address, etc., and information about how your site will operate. Please record the required information in the spaces provided.

Facility Identification...the basic description of your facility. This information will be printed on reports and tenant notices.

Name   _____
Address   _____
               _____
City   _____
State   _____ Zip _____
Telephone_____
Manager's Name _____
Site E-Mail Address_____

Rate Charge Method...this establishes the default Rate Charge Method (RCM) for the charging of rents. "First of the Month", means the rent is due on the first of each month. "Anniversary" RCM means the tenant's rent is due each month on the same day of the month they moved in. The "28 Day Cycle" option means rent is due every four weeks. "2nd Month Pro-rate" means that a full months rent will always be collected on a move-in, with the "pro-rated" portion of rent due on the first of the following month, after which the rent will always be due on the first. "By the Week" means rent is paid on a weekly basis, while "By the Day" means rent is paid daily. Tenants can be assigned a different RCM on an individual basis regardless of which option is selected.

> **First of the Month**
> **Anniversary Date**
> **28 Day Cycle**
> **2nd Month Pro-rate**
> **By the Week**
> **By the Day**

Interface...WinSen Property Manager has the capability of automatically communicating with certain gate control systems. Move-ins, move-outs, transfers, make late and pay up will be transmitted as appropriate for action by your gate control system. Select the appropriate choice:

> **None**
> **Property Sentinel**
> **Remote Sentinel**
> **Remote Keypads/Cardreaders**
> **Remote PS3**
> **WinSen Property Sentinel**

Tax Rates...WinSen Property Manager calculates and posts two kinds of taxes...Use tax and Sales tax (GST and PST in Canada). Use tax is normally associated with rental revenues and sales tax with the sale of items such as locks, packing materials, etc. Enter the appropriate tax percentages. If no tax applies, enter "0.00".

Sales tax percentage _____ %
Use tax percentage _____ %

Section 2 - System Dates

Charge And Close Dates...these are used by the system to keep track of important operational and financial dates. Since you are just beginning the process of customizing the software for your facility, these dates are not critical at this time. You can estimate when you think you might be finished installing all your current tenants, and fill in the dates accordingly, or you can just skip this part for now. After you have completed entering your current customers, you will come back and adjust these dates to reflect your "on-line" date. Refer to the **Startup** section of the manual for further information.

Last Charge Date_____
Next Daily Close_____
Next Weekly Close (optional)_____
Next Monthly Close_____
Next Quarterly Close (optional)_____
Next Yearly Close_____

Section 3 - Late Cycles/Fees

Late Cycle Schedule...the Late Cycle Schedule is a table that tells the system when to charge late fees, and when to print notices to delinquent tenants. The charges and notices are independent of each other. For example, you can have a late fee charged without sending a notice, and vice versa. Up to five separate late fees and/or notices can be setup. Not all need be used.

The Late Cycle Schedule has five rows, each denoting a cycle in the late fee/notice process. Each row has five columns designating specific information as follows:

Type of fee specifies the kind of late fee to be assessed. Five choices are available:

1. **None** - No late fee will be assessed.
2. **Fixed Charge** - A specific dollar amount is to be charged.
3. **Percent of Rent** - A specified percentage of the monthly rent is to be charged.
4. **Fixed Charge per day** - The specified late fee is charged each day the tenant is late. This late fee will continue until the tenant pays and their paid-to-date is advanced beyond the current date.

   Note: When using a daily late charge option you can establish a one time fee initially, e.g., a $10.00 initial fee and have it followed by a daily fee. Subsequent one-time fees may then be assessed in addition to any daily fees. For example, if you establish an initial fee of $10.00 on the 6th late day, then implement a daily charge of $1.00 on the 7th day late, the tenant will be charged the $10.00 on the 6th day and then an additional $1.00 each day thereafter. Should you elect to add another one-time fee of $10.00 on the 20th day late, the tenant would be charged $11.00 on the 20th day late and $1.00 per day thereafter.

5. **Percentage of past due rent** – A specified percentage of the past due rent is to be charged.

Schedule specifies whether the late fee is a "rotating" or "one-time only" charge. A "rotating" late fee will be repeated each month the tenant is late, while a "one time only" fee will be charged only once, unless the fee is a "daily fee". If the late fee is rotating, the "Days" number for this cycle must be less than or equal to 30, since the charge is "monthly oriented" (it starts over each month).

   Note: In order for a "daily fee" late fee to continue until the tenant pays their rent, you should set the "Schedule" for that late fee to "One Time Only." If it is set to "Rotating", the number of days late for the late fee calculation is started over each month. This will cause the

daily late fee to not be charged during the first part of each month.

Amount designates the amount of the late charge. If this late fee is a fixed fee, this represents a dollar amount, e.g., **<5.00>** indicating $5.00. If this late fee is a percentage of rent, then the number represents a percentage of the unit rate, e.g., **<5.00>** indicating 5.00%. If this late fee is a fixed charge per day, then the number represents the daily late fee.

Days indicates how many days will pass after the rent is due before a late charge will be assessed. For example, if 5 is entered, then five full days will pass before a late charge is posted to the tenant's account. Thus, if a tenant is due on the first, they would be assessed a late fee on the sixth by the Daily Charger.

   Note: this number means "days late", not the day of the month. A 5 in this field indicates 5 days late, not the 5th of the month.

Notice defines on what day a late notice will be printed. If 5 is entered, then the **Daily Charger** will queue up the appropriate late letter to be printed as it processes your accounts on the morning of the fifth day late.

For purposes of the Site Customization Guide, the following symbols represent the **Type of Fee** and the **Schedule**:

Type of Fee:
- **N** None.
- **$** A fixed dollar amount.
- **%** A percentage of the rent.
- **D** A daily charge.
- **%R** A percentage of the past due rent.

Schedule:
- **R** Rotating charge (starts over each month).
- **O** One time only charge.

Enter the required information in the table provided:

Late Cycle Schedule					
Cycle	Type	Schedule	Amount	Days	Notice
1					
2					
3					
4					
5					

Days to Overlock...This number instructs the system when to overlock a tenant and place them on the Lock/Unlock list. If you have a compatible gate access system, WinSen Property Manager will send a signal to deactivate the tenant's gate code after the number of days specified. As in Late Cycle Schedule above, this is the number of days late, not the day of the month.

Days to Overlock_____

Days until Automatic Lien...the system has the capability of placing delinquent tenants into "lien" status automatically if desired. This number specifies how many days late a tenant should be when this occurs. On the specified day, the system will place the tenant into "lien" status and assess your pre-defined lien charges to the unit. If you do not want to use this feature, enter "0".

Days until Automatic Lien _____

Days until "Welcome" and Thanks Letters...the system can print a "welcome" letter to your tenants after the specified number of days from movein, if desired. It can also print a "thank you" letter to your tenants after the specified number of days from move-out. Enter "0" if you do not want to print these letters.

Days until "Welcome" letter_____

Days until "Thanks" letter _____

NSF fee...this is the non-sufficient funds fee to be assessed to a customers account when there is a returned check posted.

NSF Fee _____

Administration fee and Transfer fee...The system will assess a non-refundable administration fee on move-ins if need be. It can also charge a transfer fee (your charge for transferring a tenant from one unit to another).

Administration fee amount_____
Transfer fee amount _____

R.V. Storage per-Foot Rate...this is the amount that you charge per-foot for R.V. storage. The R.V. length is set up for each tenant during movein. Enter "0.00" if you do not charge "by the foot" for R.V. storage.

R.V. storage per-foot rate_____

Minimum Balance to Charge Late Fees…This allows you to not charge a delinquent tenant late fees when their balance is less than this amount. If set to a non-zero number, the system will not charge late fees to a delinquent tenant if their balance is less than this number. Otherwise, late fees are charged based on your late cycle schedule and the tenant's paid to date.

Min. Bal. to Chg. Late Fees _____

Section 4 - Printer Setup

This section relates to printers, e.g., receipt printers, report printers, etc. Each of the printer options will have a drop down list (they cannot be listed here since each installation will vary) containing all printers you have setup within your Windows installation.

If you are running WinSen on a network, you should check the printer setups on each workstation. If a given printer is not defined, WinSen will use the Windows default printer. This setup may be done before or after you have installed the Site Customization Disk.

When you are ready, go into the Printers tab in Site Setup under Maintenance, and choose the appropriate printer as follows:

Receipt Printer...the system will print receipts for all transactions (if desired). This selection defines which printer you wish to use for this purpose.

Report Printer...this selection identifies the printer you wish to use for printing reports.

Contract printer...denotes the printer where you want to print contracts during a move-in or transfer.

Letter printer...indicates the printer where you want to print late letters and mailings.

Formfeed after receipt...check this box to cause the system to send a formfeed to the printer after printing a receipt, causing it to advance to the top of the next page. This option would be used if you are printing receipts on a parallel report printer. If you are printing receipts on a serial receipt printer, do not enable this option.

Use report for receipts and Receipt report name...WinSen Property Manager has the capability of using a user-defined format for printing receipts. If you have setup a user-defined receipt format, check this box and enter the Receipt report name - the name of the file containing your custom format. For more information, consult the documentation for "Crystal Reports".

Section 5 - General Options

This section relates to a number of general options and settings within the system.

Ret. Check Rollback...this option controls how the Paid to Date will be adjusted when a returned check is posted to a tenant's account. There are three choices: **Automatic**, **Manual**, or **None**.

1. **Automatic**...the system will divide the returned check amount by the unit rate to arrive at the number of months to roll back the paid-to-date, then will automatically roll it back. The system operator cannot access the "Months to roll" field in the returned check dialog box. When the returned check is paid, the paid-to-date will be rolled forward in the same manner.
2. **Manual**...the operator can access the "Months to roll" field noted above, and can change it from the default value if necessary. The default value will be calculated by dividing the returned check amount by the unit rate, the same as above. When the returned check is paid, the system operator will be prompted for the number of months to roll the paid-to-date forward.
3. **None**...the paid-to-date will not change when a returned check is posted or paid.

Method to roll Paid to Date when Returned Check is Posted:

> **Automatic**
> **Manual**
> **None**

Use Tax Rate From...this option controls where the system will get the tax rate to be charged on rent. There are two choices:

1. **Configuration**...the system will use the use tax rate that was configured in Section 1 to calculate tax charged on rent for all unit sizes.
2. **Size Codes**...the system will use the tax rate that is individually defined for each size code in the Size Codes section later in this guide. This allows you to have different tax rates for different types of storage. For example, if your state charges a different tax rate on outside storage than on inside storage, you would have a size code defined for each type of storage, with the corresponding tax rate.

The normal choice for this option is "Configuration".

Get use tax rate from:

> **Configuration**
> **Size Codes**

Print Ledgers...the system has the capability of printing lien and moveout ledgers which provide a printed history of all information stored in the system regarding that tenant/unit. Since the system retains the record when a tenant is moved out, printing these ledgers is optional. Select your choice:

> **Print at the close**
> **Print at time of moveout**
> **Never print**

Prorate Rent to the...this option allows you to specify the rounding method to use when the system prorates rent, for example during a movein. You can have the system round off these amounts to the nearest:

> **Penny (0.01)**
> **Nickel (0.05)**
> **Dime (0.10)**
> **Quarter (0.25)**
> **Half-dollar (0.50)**
> **Dollar (1.00)**

Notes, Reminder, and Picture Options…these options control what happens when a unit with notes, reminders, or pictures is moved out. There are three choices for each: **Keep with tenant**, **Keep with unit**, or **Prompt**. If setup to "Keep with tenant", the notes/reminders/pictures will be associated with the moved-out tenant record. If set to "Keep with unit", they will stay with the now-vacant unit, and the next tenant to be moved in. If set to "Prompt", the system will ask which option you wish to use during the moveout process.

Notes Options	Reminder Options	Picture Options
Keep w/tenant	**Keep w/tenant**	**Keep w/tenant**
Keep w/unit	**Keep w/unit**	**Keep w/unit**
Prompt	**Prompt**	**Prompt**

Tracking Number On Receipt...this option will cause the "tracking number" for a tenant to print on customer receipts.

> **Yes**
> **No**

Alternate Receipt Format...if this option is enabled, the system will print receipts in a format designed to fit into "window" envelopes. This would be useful if you mail receipts to your tenants.

> **Yes**
> **No**

Alternate Bank Deposit Log...this option causes the system to print the amounts collected for rent, late fees, security deposits, and other charges on the "bank deposit log" when you perform a close. Otherwise, only the totals are printed.

> **Yes, print alternate bank deposit log**
> **No**

Detail Miscellaneous Accounts...this option allows you to choose whether or not you wish this additional information printed on the transaction log. If enabled, each misc. charge, credit, and monthly charge account entry will be printed on the log. Otherwise, only the total amount will be printed.

> **Yes, detail miscellaneous accounts**
> **No**

Prompt for 2nd Contact Letter...this option will cause the system to prompt you to "Print 2nd Contact Letters" when you print your late letters and mailings. The "2nd contact" letters are intended for the alternate contact listed for each unit, if any, and are worded differently from the primary notices. If this option is not selected, the system will not prompt you, or print the 2nd contact letters. Otherwise, the operator will have the option to print them or not. Select "No" if you do not wish to print these additional notices.

> **Yes, prompt for 2nd contact letters**
> **No**

Generate Random Passcodes...the system has the capability to generate a random passcode when assigning a tenant if desired.

> **Yes, generate random passcodes**
> **No**

Advance Bill-Date On Payment...this option will cause the system to advance the "next bill date" by the same number of months as the "paid to date" is advanced when you post a payment. For example, if a tenant pays six months worth of rent, the "bill date" for that tenant would be advanced by six

months as well. If you do not send bills to your tenants, this option has no effect.

Yes, advance bill date on payments
No

Require Proof Edit Reconciliation...selecting this option requires that a successful proof edit be accomplished prior to each Daily Close. This option is **HIGHLY RECOMMEND-ED**. By doing a proof edit, you assure that your transactions have been entered properly before actually closing. Mistakes are much easier to correct if they are caught before the close. If this option is not selected, the Proof Edit can still be run but is not required.

Yes, require a proof edit before the close
No

Require Backup Before the Close...This option will require that a backup of your database be done before the close can be performed. Normally, backups are done after the close, but can be done beforehand if desired.

Yes, require a backup before the close
No

Allow View/Edit Rate Change...selecting this option would allow the system operator to change a tenant's unit rate within the View/Edit function. Changing rates in this manner will post a type 60A transaction to the tenant's account.

Yes, allow View/Edit rate changes
No

Allow View/Edit change to Type of Late Charge...selecting this option would allow the system operator to change the type of Late Charge and Notice treatment for each individual tenant. This allows you to exempt selected tenants from late fees and/or late notices.

Yes, allow View/Edit change to type of late charge
No

Allow Rate Change on Move-in...if this option is enabled, the unit rate can be changed during the move-in process. Otherwise, the unit rate cannot be changed during a move-in.

Yes, allow rate change on move-in
No

Auto Lockout of Tenant when Ret. Check is posted...this option will cause the system to deactivate a tenant's gate code automatically (if you have a compatible gate access system) when a returned check is posted, regardless of the Paid to Date. If this option is not selected, the system will use the Paid to Date after the return check transaction to determine if the tenant should be locked out.

Do you wish to lock out tenants automatically when a returned check is posted?

Yes
No

New Tenants are non-taxable...this option establishes the default taxable status for new tenants. When enabled, the system assumes that each new tenant is tax exempt. This would be useful if the majority of your new tenants are exempt from taxation.

New tenants are non-taxable
New tenants are taxable

Refund Rent on Moveout...if enabled, any prepaid rent on a tenant's account will be refunded during a moveout. Otherwise, the system will not automatically refund prepaid rent on moveouts. In either case, the system operator can change the amount of rent to be refunded during a moveout if necessary.

Yes, refund prepaid rent on moveout
No

Print Charger Reports…This option defines whether you wish to print the **Daily Charger** report each morning when the **Daily Charger** is run. If the report is not printed, you can reprint it in "End of Period Processing" if necessary.

Yes, print Charger reports
No

Auto Print Notices with Charger…When selected, this will cause the system to automatically print the late letters and other notices for the day when the **Daily Charger** is run. Otherwise, late letters and other notices are printed in the "Late Letters & Mailings" option under the Main Menu.

Yes, print letters automatically with Charger
No, letters will be printed in Late Letters & Mailings

Automatic System Catchup… This option allows the manager to "catch up" the system when the rental office has been closed for 1 or more days. If this option is enabled, when the system detects one or more missed daily chargers and closes, it prompts the manager if they would like to "catch up the system" for the missed days. If the manager chooses to do so, the system will run the chargers and automatically print the late letters & notices for the appropriate days, then advance the next daily close date to today's date.

This option allows the manager to update the system database without having to change the site computer date (which can cause incorrect logging of gate & alarm activity).

If the missed close(s) are monthly or yearly the "Catch Up" option does not apply. In this case you must set the computer date to the day when the monthly or yearly close was supposed to be done, run the appropriate close and backups, then set the date back to today's date and continue the day's work.

Yes, enable the Auto System Catchup option
No

Include Current Month in Prepaid Rent Calculations…this option lets the site designate whether or not they wish to have the current month included when calculating prepaid rent. If selected, prepaid rent for the current month will be included on reports that show this number, otherwise only whole months of prepaid rent are included.

Do you want to include the current month in prepaid rent calculations?

> Yes
> No

Display Find Dialog Automatically…this option will cause the "Find Unit" dialog to be displayed automatically when you first open either of the View/Edit forms. This saves you the step of pressing the Find button when you wish to find a unit.

> **Yes, display the find dialog automatically**
> No

Allow Cancellation of Closed Transaction…this option controls whether a transaction that has already been closed may be canceled or not. If it is checked, the system will allow a closed transaction to be canceled but will warn you that it is already closed and canceling or changing it will not affect the close that was already done. Otherwise, it will not allow the closed transaction to be canceled.

> **Yes, allow a closed transaction to be canceled**
> No

Use ICVerify for Credit Card Processing…this option will cause the system to interface with ICVerify during credit card transactions, automatically processing the credit card transaction. ICVerify is a program written by ICVerify, Inc., which allows automatic processing of credit cards via modem. To use this feature, you must have the proper arrangements with an authorized financial institution, and the ICVerify program. For more information, contact SSC.

Note: If you have the ICVerify program and the proper arrangements with your financial institution, the system will process autobill transactions automatically during the System Charger by passing these transactions to the ICVerify program. It will also process credit cards automatically in the Paid By Window.

> **Yes, use ICVerify for credit card processing**
> No

Section 6 - Auction Information

This section allows you to specify where and when you hold auctions of tenant's goods when they have become seriously delinquent. This information, along with the following "lien charges" is used when placing tenants into "lien status", either automatically by the Daily Charger, or manually by the system operator.

Auction Location

Name _____
Address _____
City _____
State_____Zip _____
Phone_____

Date of next auction (if known)_____
Time of next auction (if known) _____

Section 7 - Lien Charges

This section allows you to enter up to ten lien charges, along with a brief description of the charge, to be assessed to seriously delinquent tenants when their unit goes into "lien status". This information, along with the preceding "Auction Information" is used when placing tenants into "lien status", either automatically by the Daily Charger, or manually by the system operator.

Lien Charges	
Description	**Amount**
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Section 8 – Inventory Accounts

This section is used to specify the accounts to be used when inventory items are sold or received. Inventory accounts are used in conjunction with inventory items for inventory control. Inventory items are linked to inventory accounts. When an inventory item is sold, the description for the linked account will be printed on the receipt and the transaction log, and the sales amount is allocated to the specified account. This allows you to have as little or as much inventory item detail as you need on the closing reports. For example, you could have five different types of boxes specified as inventory items, and have all five of them linked to an inventory account named "boxes". Then when any of those items are sold, "boxes" will be printed on the receipt and on the transaction log. You could also setup an account for each type of box if you need that much detail on the closing reports.

Note: specific details on all inventory transactions are available through the Inventory Control Reports regardless of how many inventory accounts have been set up.

Thus, setting up inventory control is a two step process. First the inventory accounts are specified. Then the inventory items are input, with the appropriate linked account number.

Inventory accounts can have an account number ranging from 7001 to 7999. The default inventory account is **#7001 – Merchandise Sales**. Thus, if you specify no additional inventory accounts, all inventory items sold will be allocated to this account.

The data entered here will appear on the Trial Balance report when items linked to an account are sold. Up to 999 accounts are allowed. Space has been provided for ten accounts. If you need more accounts, copy the following table.

Account Number...each Inventory Account must have a unique account number between 7001 and 7999. The default account, "7001-Merchandise Sales" is already entered in the following table, as well as suggested account numbers for the next 9 accounts. If you wish to change the default account number, cross it out and write in your preferred number between 7001 and 7999. The accounts will appear on the trial balance in account number order.

Description...for each account, enter a brief description, e.g., "Locks", "Boxes", "Packing Material", etc.

Type of Tax...enter the type of tax to be charged during a transaction involving an inventory item linked to the account.

- **N** No tax.
- **S** Sales tax (PST in Canada).
- **U** Use tax (GST in Canada).
- **B** Both taxes.

Inventory Accounts		
Acct #	**Description**	**Type of Tax**
7001	Merchandise Sales	
7010		
7020		
7030		
7040		
7050		
7060		
7070		
7080		
7090		

Section 9 – Inventory Items

Use this section to enter your inventory items. Space has been provided for up to 32 different inventory items. Duplicate the following page if you need more. For each item, enter the following information:

Item Number...your internal item number. You can use any number you wish. Many of the inventory reports are sorted by this field.

Description...enter a description of the item, e.g., "Disc lock", "Small box", etc.

Vendor...enter the name of the vendor who supplies you with the item (optional).

Part Number...enter the vendor part number for this item (optional).

Reorder Point...enter the reorder point. The inventory reports will indicate that it is time to reorder when the quantity on hand falls to or below this number.

Retail Price...enter the per item retail price.

Linked Account Number...from the table in the preceding section, enter the account number to be used when items are sold.

Inventory Items						
Item Number	Description	Vendor	Part Number	Reorder Point	Retail Price	Linked Account Number

Section 10 - Charge Accounts

Charge accounts are used for one-time charges to a tenant's account such as cleaning or dumpster charges. This section is used to specify these accounts.

The data entered here will appear on the Trial Balance report and in the "Misc. Charge" windows used during customer transactions, e.g., move-ins, payments, transfers, etc. Up to 999 accounts are allowed. Space has been provided for ten accounts. If you need more accounts, copy the following table.

Account Number...each Charge Account must have a unique account number between 3001 and 3999. Default numbers are already entered in the following table. If you wish to change the default account number, cross it out and write in your preferred number between 3001 and 3999. The accounts will appear on the trial balance in account number order.

Description...for each account, enter a brief description, e.g., "Cleaning fee", "Dumpster charge", etc. This description and the above account number will appear on the Trial Balance report.

Type of Tax...enter the type of tax to be charged during a transaction involving a given Charge Account.

- **N** No tax.
- **S** Sales tax (PST in Canada).
- **U** Use tax (GST in Canada).
- **B** Both taxes.

Charge Accounts		
Acct #	**Description**	**Type of Tax**
3010		
3020		
3030		
3040		
3050		
3060		
3070		
3080		
3090		
3100		

Section 11 - Credit Accounts

The Credit accounts are used for one-time credits to a tenant's account. Coupons for rent discounts, non-profit discounts, employee discounts, etc., are examples. There are up to 999 accounts available and they can be designated in any manner you desire.

The data entered here will appear on the Trial Balance report and in the "Misc. Credit" windows used during customer transactions, e.g., move-ins, payments, transfers, etc.

Account Number...each Credit Account must have a unique account number between 6001 and 6999. Default numbers are already entered in the following table. If you wish to change the default account number, cross it out and write in your preferred number between 6001 and 6999. The accounts will appear on the trial balance in account number order.

Description...for each account, enter a brief description, e.g., "Rent Discount", "Late Fee", etc. This description and the above account number will appear on the Trial Balance report.

Type of Tax...enter the type of tax to be credited during a transaction involving a given Credit Account.

- **N** No tax.
- **S** Sales tax (PST in Canada).
- **U** Use tax (GST in Canada).
- **B** Both taxes.

Credit Accounts		
Acct #	**Description**	**Type of Tax**
6010		
6020		
6030		
6040		
6050		
6060		
6070		
6080		
6090		
6100		

Section 12 - Monthly Charge Accounts

The Monthly Charge Accounts are used for recurring charges, to be billed and due with the rent, on a tenant's account. Electricity, late access, billing fees, etc., are examples. There are up to 999 accounts available and they can be designated in any manner you desire.

The data entered here will appear on the Trial Balance report and in the "Monthly Charge Account" windows used during customer transactions, e.g., move-ins, payments, transfers, etc.

Account Number...each Monthly Charge Account must have a unique account number between 2001 and 2999. Default numbers are already entered in the following table. If you wish to change the default account number, cross it out and write in your preferred number between 2001 and 2999. The

accounts will appear on the trial balance in account number order.

Description...for each account, enter a brief description, e.g., "Electricity", "Late Access", "Billing" etc. This description and the above account number will appear on the Trial Balance report.

Type of Tax...enter the type of tax to be charged during a transaction involving a given Monthly Charge Account.

- **N** No tax.
- **S** Sales tax (PST in Canada).
- **U** Use tax (GST in Canada).
- **B** Both taxes.

Monthly Charge Accounts		
Acct #	**Description**	**Type of Tax**
2010		
2020		
2030		
2040		
2050		
2060		
2070		
2080		
2090		
2100		

Section 13 – System Accounts

This section is used to designate the type of tax, if any, to be charged on revenue accounts such as rent, late fees, transfer fees, etc. The actual tax rates were established earlier in Section 1. In the following table, list the type of tax to be charged on each system revenue account. If you do not have to charge tax on these accounts, you can skip this section.

- **N** No tax.
- **S** Sales tax (PST in Canada).
- **U** Use tax (GST in Canada).
- **B** Both taxes.

System Accounts		
Acct #	**Description**	**Type of Tax**
1001	Rent	
1002	Transfer Fee	
1006	NSF Fee	
1007	Late Fee	
1008	Lien Charge	

System Accounts		
1009	Auction Revenue	
1012	Insurance Premium	
1013	Administration Fee	

Note: assigning tax to account 1009, Auction Revenue, will cause the system to charge the designated tax on revenue collected during Lien Sales.

Section 14 - Advertising Categories

WinSen Property Manager tracks the reasons why your tenants rent from you. This can be extremely valuable in assessing the value of your marketing programs. You can designate the categories you use and they can be changed at any time. An "Advertising Effectiveness" report is available from the Report Menu and can be viewed on the computer screen or printed at any time.

In the table, enter a brief description of each advertising category you would like to use:

Advertising Categories	
Number	**Description**
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Section 15 - Size Codes

In this section, you will need to establish a "Size Code" for each different size unit that your facility has. These size codes will be used in the following section when you enter your units to designate what size that particular unit is. For each different size or type of unit you have at your facility, fill in the following information:

Size Code...a code which represents a specific size unit at your facility. It can be up to two characters in any combination you desire. The normal method is to start at A, representing your smallest unit size, and proceed in alphabetical order from there.

Description...this describes the dimensions of units of this Size Code. You can type the data in any desired format. For example, the entry might be "10 X 10 AC" indicating that the unit is 10' by 10' in size and is air conditioned. Up to 30 characters are allowed.

Rate...the standard rate for this size unit.

Deposit...the security deposit required for a unit of this size.

Tax Rate...this is the tax rate charged on rent for units of this size code. This field is provided for cases where different tax rates are assessed on different types of storage. The system will use this tax rate if you designated this in "Section 5 - General Options".

Area...the area for units of this size code. The number may represent square feet, square meters, etc.

Space has been provided for up to 28 size codes. If you have more than that, copy the following page and number it "12A", "12B", etc.

Size Codes

Size Code	Description	Rental Rate	Deposit Amount	Tax Rate	Area

Section 16 - Units

You will need to record all of the units at your facility to be included in your WinSen Property Manager software system. For each unit, enter the following information:

Unit Number...the unit number. Alpha-numeric numbers are allowed (for example, "A01"), and up to five characters are allowed. Begin by entering the lowest unit number and proceed in ascending numerical order.

Size Code...enter the size code that corresponds to the unit as recorded in "Section 15 - Size Codes".

Interface Number...this is the "Access Interface Number": the unit number that will be sent to certain gate systems when there is a transaction involving the gate, e.g., move-in, move-out, lockout, re-admit, and passcode change. If your unit numbers are numeric only, it will be the same as the unit number, and you can write in "same as unit number". However, if you have alpha-numeric unit numbers (e.g. "A01"), there are two options for assigning the interface number:

1. The alpha character can be substituted with its numeric position in the alphabet. Thus, unit A01 would have an interface number of 101, B01 would be 201, D99 would be 499, and so on.

2. It can be only the numeric portion of the unit number. For example, unit A01 could be assigned an interface number of 1. However if you also have a unit B01 this scheme will not work, because the interface number for that unit would also be 1, and the interface numbers must be unique.

Walk Order...this is the order in which you will normally "walk" the site that is most efficient and that ensures that all units have been reviewed. This is also the order your Manager would walk the site if he/she were overlocking or unlocking units. The walk order may be the same as the unit number or it may be different. If it is the same as the unit number, write in "same as unit number".

Space has been provided for up to 368 units. If additional space is required, duplicate page 18 and number it "18A", "18B", etc.

UNITS								
Unit Number	Size Code	Interface Number	Walk Order Number		Unit Number	Size Code	Interface Number	Walk Order Number

UNITS

Unit Number	Size Code	Interface. Number	Walk Order Number	Unit Number	Size Code	Interface Number	Walk Order Number

UNITS

Unit Number	Size Code	Interface Number	Walk Order Number	Unit Number	Size Code	Interface Number	Walk Order Number

UNITS

Unit Number	Size Code	Interface Number	Walk Order Number	Unit Number	Size Code	Interface Number	Walk Order Number

UNITS

Unit Number	Size Code	Interface Number	Walk Order Number	Unit Number	Size Code	Interface Number	Walk Order Number

UNITS

Unit Number	Size Code	Interface Number	Walk Order Number	Unit Number	Size Code	Interface Number	Walk Order Number

Section 17 - Customer Storage Insurance Plus

WinSen Property Manager has the capability of automating your counter top insurance program. This offers several significant advantages for your facility.

First, it allows your tenants to receive insurance coverage "on the spot". No waiting, no forms to mail in, no confusion.

Second, the premium rates are normally lower and are paid monthly (instead of quarterly) along with their rent.

Third, it gives you another opportunity to assure that they know you are not responsible for their goods, you only rent them space. Offering your tenants the option of insuring their goods can significantly reduce the site's liability in the event of damage or loss.

And fourth, the Insurance Carrier (**Deans & Homer**) will pay you an administrative fee for handling these transactions...and the system does the work.

You must be approved by **Deans & Homer** prior to implementing the "CSI +" program, and we must "hard code" your site number and their premium rate table in your software system.

An application is enclosed. To apply for the "CSI +" program, please mail it directly to **Deans & Homer** at the address indicated on the application.

Section 18 - Copies of Notices

WinSen Property Manager comes with a complete set of late & lien letters, billing letters, movein contract, transfer contract, etc. Since the late letters and other documents supplied with the system are not specific to a location, we cannot guarantee that the letters are applicable for every locality or that they meet local legal requirements. You may need to have them modified to meet your local legal requirements.

The "generic" letters can be customized for the facility, either at the site using the Crystal Reports program, or by Sentinel Systems as part of the "Site Customization and Site Setup". If desired, send us a copy of your letters along with the **Site Customization Guide**.

Customized Letter Policies

Please note the following guidelines concerning the customization of late letters by Sentinel Systems:

1. The contracts, late letters, and other mailings provided with WinSen Property Manager are examples only but may be used as starting points for customizing your letters.

2. A one-time customization of the letters and contracts, **which are included with WinSen (listed below)**, will be done at no charge (except for the cost of shipping and handling), as long as they remain **one** 8½" x 11" page in length. Additional or larger pages will be done at the prevailing hourly rate.

3. This one-time, no-charge customization process must be done within 60 days of the shipping date of the software.

4. "Other" letters (not included with WinSen), which need to be created or customized to work with WinSen, will be done at the prevailing hourly rate, and should be submitted on 3½" floppy disk in one of the following formats:

   > Microsoft Word (Version 6.0 or higher)
   > Microsoft Works (Version 3.0 or higher)
   > Wordperfect (Version 5.0 or higher)
   > ASCII Text

5. After the initial 60 day period, all customization of letters and contracts will be at the prevailing hourly rate.

Following is a list of notices for your use as a check list of what to include (please check those that you have included in this package):

> **Late Notices (up to five)**
> **Second Contact Late Notices (up to five)**
> **Partial Payment Notice**
> **Returned Check Notice**
> **Rate Change Notice**
> **Pre-Lien Notice**
> **Final Lien Notice**
> **Lease Agreement (Including TMSA contract)**
> **Transfer Contract**
> **Pre-Lease Agreement/Letter**
> **Pre-Lease Forfeiture Notice**
> **Insurance Policy Cancellation Notice**
> **Monthly, Quarterly, Semi-Annual and Annual Billing Statements**
> **"Thanks" Letter (for recently moved out tenants)**
> **"Welcome" Letter (for recently moved in tenants)**
> **Others (Please see Customized Letters Policy above)**

Section 19 - Computer Hardware Requirements

Minimum computer requirements:

- **IBM PC or 100% Compatible**
- **Pentium processor or higher**
- **Microsoft Windows 3.1, 95, 98, NT 4, or 2000**
- **32 MB RAM**
- **1 GB hard drive**
- **40 MB free hard drive space**
- **VGA Monitor**
- **1 Floppy Disk Drive**
- **Windows compatible printer**
- **Mouse**

Who do we call if we have questions?

Name _____

Telephone (_____) _____

Return your completed site customization guide to:

<div align="center">

Sentinel Systems Corporation
1620 Kipling Street
Lakewood, CO 80215
(800) 456-9955   (303) 242-2000
Fax (303) 242-2011
http://www.SentinelSystems.com

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We will send you back a self-installing Site Customization Disk containing the information on this Guide. Please note that shipping and handling charges for the Site Customization Disk will be assessed in accordance with your account terms.