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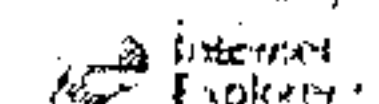
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(57) Abrégé/Abstract:

An automated self-storage reservation and management system is disclosed. The system enables customers to make a reservation for a self-storage unit, view a map for a storage facility, enter or update customer information, make a payment, view payment history and print receipts. Facility personnel can utilize the system to manage inventory and client accounts, generate reports, track sales, vacancies and delinquencies. The automated system preferably includes a communications feature that enables facility personnel to communicate with each other or with customers regarding customer accounts. Upon the occurrence of a predetermined event, the system automatically generates notices to customers or facility personnel.



Abstract

5 An automated self-storage reservation and management
system is disclosed. The system enables customers to make a
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15 or facility personnel.

5

AUTOMATED SELF-STORAGE
RESERVATION AND MANAGEMENT SYSTEMField of the Invention

10 The present invention relates generally to an automated reservation and management system, and more particularly, to a system that manages reservations, inventory, rentals, payments, vacancies and other aspects of a self-storage facility.

15

Background of the Invention

In operating a self-storage facility, facility personnel are required to track inventory, reservations, customer contracts, payments, delinquencies and various other aspects of the business. In typical storage facilities, much of the rental transaction is conducted through use of pre-printed forms that are manually filled out and stored in file drawers. To facilitate the operation of a self-storage facility, it is desirable to provide a comprehensive self-storage reservation and management system that enables the user to access information regarding storage units and customers, process rental transactions, generate management analysis information and reports, and to automate the self-storage rental transactions to the extent possible.

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Summary of the Preferred Embodiments

The automated self-storage system of the present invention includes features for use by self-storage customers and features for use by self-storage personnel. The features available for use by each type of user can vary depending on the access that the system administrator grants to each type

35

of user. In a preferred embodiment of the invention, the customer can use the system to make a reservation for a room, view a site map, update contract information, provide alternate contact information and authorized access information, view room or payment history, purchase insurance, authorize automatic credit card payments, make a non-recurring payment, and print historical and current receipts. The storage personnel can preferably utilize the automated system to perform all of the above functions plus other point of sale transactions and management functions. For example, the automated self-storage system enables the user to view an inventory menu for a specified facility, and to manage room inventory by adding or removing rooms, changing the room size or description, or indicating whether a room is damaged. The system also enables the user to manage room rates by increasing or decreasing the rates for all rooms of a particular size or description. To track the effects of the rate change, the system provides facility utilization information that calculates the percentage change in revenues as a result of the change in rates.

The automated self-storage system provides point of sale support by enabling the user to rent rooms, transfer customers from one room to another, move a customer in or out, view key information about customers prior to allowing access to facility or room, and track sales of retail items. In a preferred embodiment of the invention, the automated system enables a customer to manage multiple rental transactions on the same contract, and arrange different payment options in connection with each rental transaction. For example, a customer may have four rental units, one that is paid for using automatic credit card payments, another that is invoiced monthly, a third that is paid using a check and a fourth that is invoiced quarterly. The due dates for the payments can be controlled by the user to fall on the same date or any other

specified date. When automatic payments are designated, the system interfaces with a credit card authorization system to collect scheduled payments.

5 Because the information pertaining to inventory, rental, sales, and payments are provided in a centralized system, the user is able to run various management reports to assess the status of the business of the self-storage facility. For example, audit reports are provided to detect or prevent intentional theft and to identify unintentional errors in
10 entering payments, fee waivers, and write-offs. The facility personnel can also view all open contracts, reservations, expiring credit card reports, cash summaries, and customer rent roll reports.

15 In a preferred embodiment of the invention, the system enables the storage facility personnel to communicate with a customer by sending a message or a note to the customer's account. In the event that a customer is delinquent, the system automatically sends the customer a letter requiring action. The system also generates customer letters when the
20 rental rate on the customer's rental unit is scheduled to change or if the customer is subject to an eviction notice.

The operation of the automated self-storage system is preferably controlled, at least in part, by a set of business rules created for the application. The business rules are
25 completely customizable and are based on the needs, requirement and preferences of the user or facility, and on various local, state and federal regulations. Through customization of the business rules, a user can instruct the system to provide certain services, to send particular form
30 letters to clients, to apply payments on a specified date and to customize the operation of other features of the system.

It is envisioned that the automated storage system of the present invention can be used in connection with a network of storage facilities, wherein the user can access information

regarding remote facilities and can perform management or rental functions without being physical present at the facilities. Accordingly, depending on a user's level of authorization, the user can perform all of the functions described herein for any number of facilities, either remotely or while present at the site.

Other objects, features and advantages of the present invention will become apparent to those skilled in the art from the following detailed description. It is to be understood, however, that the detailed description and specific examples, while indicating preferred embodiments of the present invention, are given by way of illustration and not limitation. Many changes and modifications within the scope of the present invention may be made without departing from the spirit thereof, and the invention includes all such modifications.

Brief Description of the Drawings

The invention may be more readily understood by referring to the accompanying drawings in which:

FIG. 1 depicts a preferred embodiment of the login capture of the present invention;

FIG. 2 depicts a preferred embodiment of the system menu of the present invention;

FIG. 3 depicts a preferred embodiment of the customer type feature of the present invention;

FIG. 4 depicts a preferred embodiment of the customer information search feature of the present invention;

FIG. 5 depicts a preferred embodiment of the customer search results of the present invention;

FIG. 6 depicts a preferred embodiment of the customer information feature of the present invention;

FIG. 7 depicts a preferred embodiment of the contact feature of the present invention;

FIG. 8 depicts a preferred embodiment of the emergency contact information capture feature of the present invention;

5 FIG. 9 depicts a preferred embodiment of the authorized access capture feature of the present invention;

FIG. 10 depicts a preferred embodiment of the authorized access list of the present invention;

10 FIG. 11 depicts a preferred embodiment of the room search feature of the present invention;

FIG. 12 depicts an exemplary list of available rooms provided by the automated system of the present invention;

15 FIG. 13 depicts a preferred embodiment of detailed rental information generated by the automated system of the present invention;

FIG. 14 depicts a preferred embodiment of the room selection feature of the present invention;

FIG. 15 depicts a preferred embodiment of the security code capture of the present invention;

20 FIG. 16 depicts a preferred embodiment of the automatic payment plan list of the present invention;

FIG. 17 depicts a preferred embodiment of the credit card information feature of the present invention;

25 FIG. 18 depicts a preferred embodiment of the automatic payment credit cards list of the present invention;

FIG. 19 depicts a preferred embodiment of the invoice cycle option of the present invention;

FIG. 20 depicts a preferred embodiment of the fees summary feature of the present invention;

30 FIG. 21 depicts a preferred embodiment of the sales item selection feature of the present invention;

FIG. 22 depicts a preferred embodiment of the room selection feature of the payment capture function of the present invention;

FIG. 23 depicts a preferred embodiment of the summary of fees due generated by the automated system of the present invention;

5 FIG. 24 depicts a preferred embodiment of the cash payment capture of the present invention;

FIG. 25 depicts a preferred embodiment of the check information capture of the present invention;

FIG. 26 depicts a preferred embodiment of the coupon payment capture of the present invention;

10 FIG. 27 depicts a preferred embodiment of the credit card payment capture of the present invention;

FIG. 28 depicts a preferred embodiment of the money order payment capture of the present invention;

15 FIG. 29 depicts a preferred embodiment of the updated fees due summary of the present invention;

FIG. 30 depicts a preferred embodiment of the ledger feature of the present invention;

FIG. 31 depicts a preferred embodiment of a rental agreement of the present invention;

20 FIG. 32 depicts a preferred embodiment of the customer information search feature of the present invention;

FIG. 33 depicts a preferred embodiment of the location finder feature of the present invention;

25 FIG. 34 depicts a preferred embodiment of a list of cities of a selected region generated by the automated system of the present invention;

FIG. 35 depicts a preferred embodiment of a list of storage facilities located within a selected city, generated by the automated system of the present invention;

30 FIG. 36 depicts a preferred list of available rooms at a specified storage facility, generated by the automated system of the present invention;

FIG. 37 depicts a preferred embodiment of the move-in capture feature of the present invention;

FIG. 38 depicts a preferred embodiment of the contract/reservation search engine of the present invention;

FIG. 39 depicts a preferred embodiment of a list of rooms associated with a specified customer, generated by the automated system of the present invention;

FIG. 40 depicts a preferred embodiment of a room selection list generated by the transfer capture feature of the present invention;

FIG. 41 depicts a preferred embodiment of a room selection list generated by the transfer capture feature of the present invention;

FIG. 42 depicts a preferred embodiment of the balance due calculation generated by the transfer capture feature of the present invention;

FIG. 43 depicts a preferred embodiment of a list of reports generated by the automated system of the present invention;

FIG. 44 depicts a preferred embodiment of a room inventory database of the present invention;

FIG. 45 depicts a preferred embodiment of a facility utilization report generated by the automated system of the present invention;

FIG. 46 depicts a preferred embodiment of a messenger feature of the present invention;

FIG. 47 depicts an exemplary list of letter templates available through the letter generation feature of the present invention;

FIG. 48 depicts a sample letter template in the letter generation feature of the present invention;

FIG. 49 depicts a sample set of business rules to govern the automated features of the self-storage management system of the present invention.

Like numerals refer to like parts throughout the several views of the drawings.

Detailed Description of the Preferred Embodiments

The automated self-storage reservation and management system 10 of the present invention provides customers and personnel of self-storage facilities access to information and tools that facilitate the making of reservations, payments, creation and management of accounts, generation of various reports and other tasks that were previously either not available to users or were far more difficult to accomplish.

In a preferred embodiment of the invention, as shown in Figure 1, a user can login to the system using a secure login capture 12. The system 10 may provide different levels of access to system users depending on the user's authorized security level. For example, owners, managers, and employees (hereinafter "self-storage personnel") may have broader access to the management features of the system, such as report generation. In contrast, self-storage customers may have limited access to the reservation and account management features of the invention. The level of access provided to the customers and self-storage personnel can vary and is controlled by a system administrator.

The self-storage system of the present invention may have more than one login capture to accommodate self-storage customers and self-storage personnel. In the embodiment shown in Figure 1, the login capture 12 is a business sign on provided for self-storage personnel. In a preferred embodiment of the invention, customers can be provided with a separate customer sign on page. In another embodiment of the invention, the system 10 provides a general login capture for all users.

The login capture 12 prompts the user for a login identification 14 and a password 16. Upon entry of the requested information, the login capture 12 verifies the login identification 14 and password 16 and if authorized, provides the user access to the system.

In a preferred embodiment of the invention, as shown in Figure 2, the automated self-storage system includes a move in capture 20, a reservation capture 30, a payment capture 40, a move out feature 50, a contract review feature 60, a transfer capture 70, an open contracts report feature 80, an authorized access report feature 90, and a report list 100.

The move in capture 20 enables the user to set up new move in contracts for customers. Upon activating the move in capture 20, the system prompts the user to choose a customer type 201, as best shown in Figure 3. In a preferred embodiment of the invention, the customer type is selected from one of the following: business 202, corporate 203, individual 204 or system use 205. In a more preferred embodiment of the invention, the individual 204 selection is provided as the default selection.

Figure 4 depicts the customer information search feature 210 that is activated upon selection of a customer type. The search feature 210 enables the user to search for a particular customer by entering identifying information pertaining to the customer. For example, in the embodiment shown in Figure 4, the user is prompted for the first name 212 and last name 214 of the customer. If the customer type 201 had been a business, the customer's identifying information could be the business name or account number. Upon entering the customer's information, the system provides the customer search results 216, as shown in Figure 5, which is a list of customers matching the customer identification information entered in the search feature 210. The customer search results 216 preferably includes the name, address, and telephone number of the customers to assist the user in identifying each customer. If the customer for which the user is searching is found in the system, the user can select the customer by simply activating a customer selection key 217. If the customer is new and has not yet been entered into the

system, the customer may be added by selecting the customer add key 218.

5 If the customer add key 218 is activated, the system prompts the user for customer information 220, as shown in Figure 6. In a preferred embodiment of the invention, the system prompts the user for the customer's name 221, address 222, phone number 223, social security number 224, driver's license number 225, employer information 226, email address 227 and tax exempt information 228.

10 As best shown in Figure 7, the system preferably includes a contact feature 230 that prompts the user to identify the person(s) who should be notified in case of fire, flood, burglary or break-in. To create a new contact, the add contact key 232 is activated. Upon activation of the add
15 contact key 232, the system preferably prompts the user for emergency contact information, as shown in Figure 8. Emergency contact information preferably includes the name 233, telephone number 234, address 235 and email address 236 of the contact. In the event of an emergency, the system
20 provides convenient access to the emergency contact information.

In addition to emergency contact information, the contact feature 230 prompts the user for the identity of person(s) having authorized access, as shown in Figure 9. The
25 authorized access information 240 preferably includes the name 241, telephone number 242 and address 243 of each authorized user. As shown in Figure 10, the system tracks individuals with authorized access to the facility. The authorized access list 244 may be amended by deleting existing
30 authorized contacts, adding new contacts or modifying the authorized access information 240 for an authorized contact. The system preferably includes a delete feature 245, add feature 246 and edit feature 247 for facilitating the modification of the authorized access information.

In a preferred embodiment of the invention, as shown in Figure 11, the automated self-storage system has a room search feature 250 that enables the user to search available rooms.

In the embodiment shown in Figure 11, the room search feature 250 includes a room number search 252, product type search 254 and a room size search 256. If the room number of the desired storage facility is known, the user can enter it in the room number search 252. Alternatively, the user can search storage facilities by product type 254, such as crates, rvs, split levels, or by room size 256. To view a list of all available rooms, the "all" feature 258 may be selected from either the product type menu 255 or the room size menu 257.

Figure 12 depicts an exemplary list of available rooms 260 generated by the automated system. The list 260 preferably includes the room number 261, size 262, product type 263, description 264 and rate 265. To rent a room, the desired room is selected from the list of available rooms 260.

Upon selection of the room, the system prompts the user for detailed rental information, as shown in Figure 13. A "Next Bill Date" feature 266 enables the user to select the date on which the next rental bill is issued. This feature is particularly useful if a customer has several rentals and seeks to consolidate the billing date for all rentals. As a default, the "Next Bill Date" will be one month from the date of rental. If the vacate date is known, it can be entered in the vacate date capture 267. If the rental is for an unspecified length of time, the vacate date capture 267 can be left blank. The system preferably provides the user with a list of services 270 that are available in connection with the rental. For example, in the embodiment shown in Figure 13, the list of services 270 includes insurance coverage 271, access card replacement 272, promotional discounts 273, and dumpster services 274. If a customer wishes to purchase insurance, the insurance coverage 271 is simply selected from

the list of services 270. The system preferably also includes a user alert 275 that notifies the user of various policies and regulations in connection with the rental.

In a preferred embodiment of the invention, as shown in Figure 14, the room selection process can be repeated to rent multiple rooms in the same transaction. In the embodiment shown in Figure 14, four rooms of varying types, sizes, and prices have been selected. The list of selected rooms 280 can be modified by using the delete 282 and add 283 features. It is not necessary to begin a new transaction for each rental. All rental transactions can be entered on a single contract. The customer information is entered once and can be used repeatedly without requiring the user to re-enter the information.

The automated self-storage system preferably includes a security code capture 285, as shown in Figure 15. The security code capture 285 enables the user to enter a password 286 in connection with each rental unit. The password 286 is then used as the security code to open the access gate to the rental unit. The customer may have the same password in connection with each of the customer's rental units. Alternatively, different passwords can be used for each unit. The passwords are preferably numeric. The automated self-storage system of the present invention preferably interfaces with the facility security gate system. Upon selection of the password, the automated self-storage system communicates with security gate system to enable customers to proceed through the gates upon providing the correct password at the gate. In a preferred embodiment of the invention, if a customer's account is delinquent, the system interfaces with the security gate to deactivate the client's access.

Upon selection of the rental units and associated services, the automated self-storage system provides the user with the opportunity to make payment arrangements. In a

preferred embodiment of the invention, as shown in Figure 16, the system includes an automatic payment capture 400. The automatic payment capture 400 enables the user to automatically pay the fees associated with a rental unit by charging the monthly rate to a credit card. The automatic payment capture 400 can be applied to any combination of rental units. For example, in the embodiment shown in Figure 16, rooms 1525 and 1685 have been designated for the automatic payment plan. One advantage of the automated system of the present invention is the ability to rent multiple rooms on the same contract and apply different payment types and different due dates to each rental. Accordingly, if desired, the automatic payment capture 400 can be applied to all rental units or none of the rental units.

The automatic payment capture 400 prompts the user for credit card information 401, as shown in Figure 17. The credit card information 401 preferably includes the card type 402, account number 403, expiration date 404 and name on card 405. In a preferred embodiment of the invention, as shown in Figure 18, additional credit cards may be added to the list of auto payment credit cards 410 by using the add key feature 412. As best shown in Figure 16, a credit card identifier 414 is provided in association with each rental unit that is selected for the automatic payment plan. The credit card identifier 414 provides the account number of the credit card that is authorized to be charged in connection with the rental unit. The same credit card can be used for all rental units or different credit cards may be used for each unit.

For rental units that have not been linked to the automatic payment feature, the system provides the user with an invoice cycle option 415 as shown in Figure 19. The invoice cycle option 415 enables the user to select a billing cycle for each of the rental units that are not linked with the automatic payment feature. For example, in Figure 19, a

monthly billing cycle 216 is selected for room 1670 and a quarterly billing cycle 217 is selected for room 9898. In a preferred embodiment of the invention, the user can select a monthly, quarterly, semiannual or annual billing cycle.

5 In addition to automatic payment and invoice billing options, the automated self-storage system of the present invention preferably enables the user to make non-recurring payments. As shown in Figure 20, the system preferably includes a fees summary feature 420 that lists the outstanding
10 charges in connection with an account. The fees summary feature 420 includes the due date 421 for each charge, the rental unit 422 with which the charge is associated, the amount of the fee 423, any associated tax 424, a description of the fee 425, and the total 426. Upon viewing the fees
15 summary feature 420, the user can select the payment feature key 430 to apply a payment toward the outstanding bill. The system preferably includes an add future feature 432 that enables the user to add future charges to the fees summary feature 420.

20 It is envisioned that the system of the present invention will manage all features of the customer's account and enable the customer to make payment arrangements for all goods and services purchased. In this regard, if a customer purchases goods that are on sale at the storage facility, the cost of
25 the goods may also be added to the fees summary feature using the sales items function 434. By activating the sales items function 434, the system provides the user with a list 436 of sales items available at the storage facility, shown in Figure 21. The item 437 being purchase is selected list 436. If
30 desired, the sales item can be associated with a particular rental unit 438. Upon selection of the desired sales items 437, the price is added to the fees summary feature 420.

In a preferred embodiment of the invention, a payment can be made by activating the payment feature key 430, shown in

Figure 20. Upon activation of the payment feature key 430, the system provides the user with a list of the customer's rooms 440 for which payment can be made, as shown in Figure 22. The user can select the specific room 442 toward which payment is to be made. If desired, all rooms can be selected. In the embodiment shown in Figure 22, three of the four available rooms are designated for payment. Upon selection of the rooms to which payment should be applied, the system provides the user with a summary of the fees due 444 for the particular rooms selected, as shown in Figure 23. A balance due 446 is provided indicating the total payment that is due for the selected rooms. The user can select the payment type 450 that is to be used to settle the account. In a preferred embodiment of the invention, the payment type 450 can be credit card, cash, money order, coupon or check. The system of the present invention can preferably apply payment of any type specified above, or a combination of payment types specified above, to the outstanding balance.

As shown in Figure 24, if a cash payment 452 is selected, the user enters the cash amount that is collected in the amount collected capture 454. The system automatically calculates the change due 456 and preferably provides the user with the option of applying the change as a credit to the account by activating the credit feature 458.

As shown in Figure 25, if payment is made by check, the check information capture 460 prompts the user for the check type 461, check number 462, bank number 463, account number 464 and amount of the check 465. If payment is made with a coupon, the coupon information capture 466, shown in Figure 26, prompts the user for the coupon type 467, coupon number 468 and the amount collected 469. For credit card payments, a credit card payment capture 470, shown in Figure 27, prompts the user for the card type 471, account number 472, account holder's name 473, expiration date 474 and amount to be

charged 475. For money order payments, a money order information capture 476, shown in Figure 28, prompts the user for the order number 477 and the money order amount 478. The system automatically calculates any change 479 that is due and gives the user the option to apply any change as credit to the account by activating the credit feature 458. The customer selects the manner in which the payment is made. The system captures information pertaining to the type and amount of payment and updates the database to reflect the payment.

In a preferred embodiment of the invention, as shown in Figure 29, after applying the payment, the system provides the user with an updated fees due summary 480 that lists the charges that remain outstanding. The system also provides the user with a summary of payments collected 482. In the embodiment shown in Figure 29, the payments collected feature 482 indicates that a payment of \$221.49 was made by money order number 1234. A summary of the customer's account may also be obtained by activating the ledger feature 490 of the system. The ledger feature 490, as best shown in Figure 30, provides an account history for a specified contract. In a preferred embodiment of the invention, the ledger feature 490 includes a listing of all charges 491, payments 492, reversed charges 494 and fee waivers 495. The ledger feature 490 also indicates the charges which have been paid in full 496 and provides the balance due 497 on the account. The ledger feature 490 can be organized as desired by the user. For example, in a preferred embodiment, the ledger feature includes a sort feature 498 that enables the user to sort the entries in ascending or descending order. The ledger feature 490 can be further modified to show charges pertaining to a particular room 499 or to show charges for a particular time period 500.

In a preferred embodiment of the invention, the automated self-storage system generates a rental agreement 600, shown in

Figure 31. The rental agreement 600 preferably lists the customer information 220, alternate contact information 230, authorized contact information 240, list of selected rooms 280, list of selected services 270, credit card payment information 401, payment history 491 and any notes 601 pertaining to the account. The rental agreement 600 can be customized to add information or delete information as desired by the user. Furthermore, the headings of the rental agreement 600 are preferably hyperlinked such that activation of the heading provides additional information regarding the subject matter of the heading. By way of example, by activating the customer information heading, more detailed customer information is provided. The hyperlinked headings are preferably highlighted in some manner. In the embodiment shown in Figure 31, the hyperlinked headings are shown with an upward arrow, indicating that additional information is available by activating the heading. The rental agreement can be modified by the user to update customer, payment, or rental information. Upon updating the agreement 601, the information is updated in the system's database to ensure that all related records are updated.

The foregoing description pertains to the tasks associated with moving a customer into a rental unit. These tasks include selecting an appropriate room, providing customer information, including emergency contact and authorized access contact information, making payment arrangements, and creating a rental contract. The automated self-storage system 10 of the present invention can perform these functions individually or in any combination. It is not necessary that the steps described herein be performed in the order described.

In a preferred embodiment of the invention, the automated self-storage system 10 includes a reservation capture 30, shown in Figure 2, for making a new reservation for a customer

or modifying an existing reservation. Upon activation of the reservation capture 30, the customer information search feature 210 (shown in Figure 32) is called. If the user seeks to modify an existing reservation, the identity of the customer is entered. Upon entering the customer's information, the system provides customer search results 216, as shown in Figure 5. If a new reservation is being made, a location finder feature 301 is provided, as shown in Figure 33. In a preferred embodiment, the location finder feature 301 is in the form of an interactive map. The user is prompted to select the region 302 in which a storage facility is sought. Alternatively, a region or specific entity can be entered manually. Upon selection of a region 302, the system provides a list of cities 303 (shown in Figure 34) within the selected region that provide storage facilities. The user is prompted to choose a city from the list provided. Upon selection of a city, the system provides a list of storage facilities 304 (shown in Figure 35) within the selected city. The user can then choose a storage facility from the list provided. As shown in Figure 36, the system preferably provides the user with a list of rooms 306 located at the selected storage facility. The list 306 preferably indicates the size 307 of each room, the type of room 308, the floor on which the room is located 309, the elevator level 310, the climate control feature 311, the square footage 312, the number of vacant rooms 313, the occupancy rate 314, and the monthly rental rate 315. In a preferred embodiment of the invention, the system provides the user with a map of the storage facility indicating the location of each rental unit on the map.

Upon selecting the desired unit, the system prompts the user for the move-in date 320, as shown in Figure 37. If the rental unit is available for the move-in date specified, the system preferably prompts the user for customer information,

as previously described. For confirmed reservations, payment can be made using the various payment features described above.

5 Referring to Figure 2, the payment capture feature 40 of the automated self-storage system enables the user to apply a customer's payment toward an existing balance or a future payment. As shown in Figure 38, upon activation of the payment capture feature 40, a contract/reservation search engine 41 is invoked. The user can search existing contracts
10 by any variable including contract number 42, storage unit number 43, customer identification 44, receipt number 46 or other identifying information. Once the desired contract is found, the system invokes the fee summary feature 420 (shown in Figure 20) for the selected customer, which indicates the
15 outstanding charges in connection with the account. After reviewing the charges, a payment can be applied against the charges by activating the payment feature key 430. Payment can be made by cash, check, money order, coupon, or credit card as described in greater detail above.

20 Referring to Figure 2, the move out feature 50 of the present invention enables the user to review contracts and move out existing customers. Upon activating the move out feature 50, the system invokes the contract/reservation search engine 41 to assist the user in finding the customer or
25 contract that is to be moved out. Once the desired customer or contract is found, the system provides a list of rooms 501 associated with the selected customer or contract, as shown in Figure 39. A move out function key 502 is provided to activate the move out feature. Upon selection of the move out
30 function key 502, the system is updated to indicate that the customer has moved out of the room selected. The system will update the inventory database to reflect the room is now vacant. The customer's contract will reflect that the transaction has been closed. In a preferred embodiment of the

invention, the system confirms that outstanding charges on the room have been paid prior to completing the move out function.

Referring to Figure 2, the contract review feature 60 enables the user to review and modify information on an existing contract, record a payment or move in a customer with a confirmed reservation. Upon activating the contract review feature 60 and selecting a customer, the system displays the rental agreement 600 of the selected customer, as shown in Figure 31. As discussed above, the user is able to review and modify the customer information 220, alternate contact information 230, authorized contact information 240, list of selected rooms 280, list of selected services 270, credit card payment information 401, payment history 491 and any notes 601 pertaining to the account.

The transfer capture 70, shown in Figure 2, allows the user to transfer a customer from one room to another. As shown in Figure 40, upon identifying a customer, the transfer capture 70 provides the user with a list of rooms 701 currently occupied by the specified customer from which the customer can transfer. The user can select one or more rooms from the list 701 provided. Upon selection of the room(s) to be transferred from, the system provides the user with a list of vacant rooms 702, shown in Figure 41, into which the customer can transfer. As best shown in Figure 42, upon selection of the room(s) to be transferred into, the system calculates the prorated rent (or credit) due 703 for the room(s) that are vacated and the prorated rent due 704 for the room(s) that are to be occupied. When the transfer is completed, the system automatically updates the contract to reflect the room transfer, and updates the room inventory database.

Referring to Figure 2, the open contracts report feature 80 enables the user to view a list of all active, open contracts. Each item on the open contract list can be

hyperlinked to the corresponding rental agreement 600 to provide more detailed contract information, if needed. The authorized access report feature 90 enables the user to confirm the identity of the person(s) that the customer has authorized to access the rental unit. The report list 100, provides the user with a list of reports 100, shown in Figure 43, that are available to the user.

The automated self-storage system of the present invention provides storage facility personnel with information and tools necessary to manage a self-storage business. In a preferred embodiment of the invention, the system includes a room inventory database 801, as shown in Figure 44, that lists all available rooms for the facility, and the room number 802, room size 803, room description 804, occupancy status of the room 805, and the rental rate 806 for each room. In a more preferred embodiment, the system displays a map (not shown) depicting the layout of the facility and the location of each room. If new rooms are created, eliminated or changed, the user can update the inventory database 801 to reflect the modification.

As shown in Figure 45, the automated system preferably includes a facility utilization chart 810 that provides revenue and occupancy information for a particular facility. In a preferred embodiment of the invention, the facility utilization chart 810 identifies the rooms by size 811, the square footage 812 for each room, the number of rooms 813 within the facility that are of the specified size, the number of occupied rooms 814, vacant rooms 815, the percentage of the specified rooms that are occupied 816, the current rate 817, the new rate 818, current potential income 819, new potential income 820, current revenue per square foot 821, new revenue per square foot 822, current occupancy income 823, new occupancy income 824, and the occupancy income percentage change 825. To change the rate for a room, the user can enter

a new rental rate 818. The system automatically calculates the values of the other variables in the facility utilization chart 810, enabling the user to evaluate the effect of a new rate on revenue.

5 In a preferred embodiment of the invention, the system includes a messenger 850, as shown in Figure 46, to facilitate communication between system users. To send a message to another user, the a recipient 852 is identified and a message is typed into the text box 854. The message can be
10 transmitted to other facility personnel or to a customer. The system will deliver the message to the intended recipient and the recipient will be informed of the message upon logging into the system.

 The system preferably includes a letter generation
15 feature 860, shown in Figure 47, to further facilitate communication with customers by generating letters. The letter generation feature 860 includes templates for various types of letters to customers. For example, in the embodiment of the invention shown in Figure 47, the system includes
20 letter templates for various stages of delinquency, autopayment notice, eviction notice, lien sale notice, auction sale results, invoicing, overpayment, underpayment, partial payment, rate change notice, room number change, sale and seizure notice, and tax change notice. In a more preferred
25 embodiment of the invention, a customer letter is generated upon the occurrence of a predetermined event. For example, the system can be adapted to generate a delinquency letter when the customer is five days late on payment of the rental fee due. A sample template letter 870 is shown in Figure 48.
30 The sample template letter is an auction notice for notifying a customer that the items in the self-storage unit will be auctioned.

 In a preferred embodiment of the invention, business rules are provided to the system to govern the automated

features. A sample list of business rules 880 is shown in Figure 49a-e. The business rules 880 govern the type of letter that is generated for each type of event and the date on which the letter should be generated. For example, as shown in Figure 49c, the business rules require that a first late notice letter 881 be sent for the first stage delinquency. Furthermore, the business rules state that the letter is to be sent two days after the account is late 882. Similar rules are provided for other types of letters.

Business rules may be set to control various automated features of the invention. For example, business rules can be set for governing the services that will be offered through the system (e.g., invoicing, credit card payments, etc.), the charges for various services, reporting options and any other automated feature of the invention. The business rules can be modified in accordance with business policies, user preferences and local, state and federal regulations.

In a preferred embodiment of the invention, the system has an auction organizer feature. Under certain conditions, storage facilities may be entitled to conduct a lien sale of the contents of a storage unit and use the proceeds of the sale to settle the balance of a past due accounts. Prior to conducting such a sale, appropriate notice must be provided to the customer. The contents and timing of the notice are typically governed by state laws. In a preferred embodiment of the present invention, the auction organizer feature of the automated system stores the notice requirements for each jurisdiction and generates a letter providing the appropriate notice to the customer. The auction organizer feature sets the date for the lien sale in accordance with the laws of the jurisdiction. Upon setting the date, the auction organizer feature searches the system for other delinquent accounts that are eligible for lien sales, to evaluate the possibility of consolidating lien sales for multiple accounts. The auction

organizer feature preferably notifies the local facility personnel of the upcoming lien sale and alerts them to the last date by which other accounts can be consolidated in the lien sale.

5 After the lien sale, the proceeds from the sale are credited to the balance on the outstanding account. The system preferably generates a letter to the customer reporting the results of the lien sale, the amount raised by the sale, and any balance remaining on the account.

10 In summary, the automated self-storage system 10 of the present invention enables customers to make a reservation for a room, view a site map, update contract information, alternate contact information and authorized access information, view room or payment history, purchase insurance,
15 authorize automatic credit card payments, make a non-recurring payment, and print historical and current receipts. Storage facility personnel can preferably utilize the automated system to perform all of the above functions plus other point of sale transactions and management functions. For example,
20 the automated self-storage system enables the user to view an inventory menu for a specified facility, and to manage room inventory by adding or removing rooms, changing the room size or description, or indicating whether a room is damaged. The system also enables the user to manage room rates by
25 increasing or decreasing the rates for all rooms of a particular size or description. To track the effects of the rate change, the system provides facility utilization information that calculates the percentage change in revenues as a result of the change in rates.

30 The automated self-storage system provides point of sale support by enabling the user to rent rooms, transfer customers from one room to another, move a customer in or out, view key information about customers prior to allowing access to facility or room, and track sales of retail items. When the

customer selects a gate access code, the system preferably interfaces with the gate security system to provide access to the customer upon entering the correct gate access code. In a preferred embodiment of the invention, the automated system enables a customer to manage multiple rental transactions on the same contract, and arrange different payment options in connection with each rental transaction. The due dates for the rental payments can be controlled by the user to fall on the same date for all units or on different dates specified by the user. When automatic payments are designated, the system interfaces with a credit card authorization system to collect scheduled payments.

Because the information pertaining to inventory, rental, sales, and payments are provided in a centralized system, the user is able to run various management reports to assess the status of the business of the self-storage facility. For example, audit reports are provided to detect or prevent intentional theft and to identify unintentional errors in entering payments, fee waivers, and write-offs. The facility personnel can also view all open contracts, reservations, expiring credit card reports, cash summaries, and customer rent roll reports.

In a preferred embodiment of the invention, the system enables the storage facility personnel to communicate with a customer by sending a message or a note to the customer's account. In the event that a customer is delinquent, the system automatically sends the customer a letter requiring action. The system also generates customer letters when the rental rate on the customer's rental unit is scheduled to change or if the customer is subject to an eviction notice.

The operation of the automated self-storage system is preferably controlled, at least in part, by a set of business rules created for the application. The business rules are completely customizable and are based on the needs,

requirement and preferences of the user or facility, and on various local, state and federal regulations. Through customization of the business rules, a user can instruct the system to provide certain services, to send particular form letters to clients, to apply payments on a specified date and to customize the operation of other features of the system.

It is envisioned that the automated self-storage system of the present invention can be used in connection with a network of storage facilities, wherein the user can access information regarding remote facilities and can perform management or rental functions without being physical present at the facilities. Accordingly, depending on a user's level of authorization, the user can perform all of the functions described herein for any number of facilities, either remotely or while present at the site.

In a preferred embodiment of the invention, the automated self-storage system is available to users on a computer network having at least one computer-server for communicating with the users. Communication with the users is preferably carried out using a browser program on a computer-terminal at a location remote from the computer-server.

The embodiments described above are exemplary embodiments of an automated self-storage reservation and management system. Those skilled in the art may now make numerous uses of, and departures from, the above-described embodiments without departing from the inventive concepts disclosed herein. Accordingly, the present invention is to be defined solely by the scope of the following claims.

What is claimed is:

1. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

an inventory information capture having information pertaining to self-storage units;

a customer information capture having information pertaining to customers; and

a reporting feature in communication with the inventory information capture and the customer information capture, wherein the reporting feature includes a revenue report.

2. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

an inventory information capture having information pertaining to self-storage units;

a customer information capture having information pertaining to customers; and

a rental transaction feature in communication with the inventory information capture and customer information capture, wherein the rental transaction feature creates a rental agreement using information from the inventory information capture and the customer information capture, and wherein the rental agreement involves a plurality of self-storage units.

3. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

an inventory information capture having information pertaining to self-storage units;

a customer information capture having information pertaining to customers; and

an automatic payment feature in communication with the inventory information capture and customer information capture, the automatic payment feature having a credit card information capture to receive information regarding a credit card to be charged, wherein the automatic payment feature periodically applies rental charges to the credit card.

4. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

an inventory information capture having information pertaining to self-storage units;

a customer information capture having information pertaining to customers;

a rental transaction feature in communication with the inventory information capture and the customer information capture; and

an inventory management feature in communication with the inventory information capture, wherein the inventory management feature enables the user to modify the information pertaining to self-storage units.

5. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

an inventory information capture having information pertaining to self-storage units;

a customer information capture having information pertaining to customers;

a rental transaction feature in communication with the inventory information capture and the customer information capture; and

a rate setting feature in communication with the inventory information capture, wherein the rate setting feature communicates a rental rate to the inventory information capture.

5

6. The automated self-storage management system of claim 2 wherein the customer information capture includes an authorized access identifier.

10

7. The automated self-storage management system of claim 2 wherein the customer information capture includes an emergency contact identifier.

15

8. The automated self-storage management system of claim 2 wherein the customer information capture includes a payment history.

20

9. The automated self-storage management system of claim 2 wherein the customer information capture includes a credit card identifier.

25

10. The automated self-storage management system of claim 2 wherein the plurality of storage units comprises a first storage unit and a second storage unit, an automatic payment feature applied to the first storage unit, and an invoicing feature applied to the second storage unit.

30

11. The automated self-storage management system of Claim 2 comprising a transfer feature that transfers a customer from an occupied room to a vacant room.

12. The automated self-storage management system of claim 11 comprising a fee calculator that calculates a

prorated rent for the occupied room and a prorated rent for the vacant room.

5 13. The automated self-storage management system of claim 1 wherein the reporting feature includes an audit report.

10 14. The automated self-storage management system of claim 1 wherein the reporting feature includes a cash intake report.

15 15. The automated self-storage management system of claim 1 wherein the reporting feature comprises data configured to be exported to an external financial database.

 16. The automated self-storage management system of claim 2 wherein the inventory information capture comprises a map.

20 17. The automated self-storage management system of claim 1 wherein the reporting feature comprises a receipt for self-storage transactions.

25 18. The automated self-storage management system of claim 1 wherein the reporting feature comprises a vacancy report.

30 19. The automated self-storage management system of claim 1 wherein the reporting feature comprises a facility utilization report.

 20. The automated self-storage management system of claim 2 further comprising a communication feature configured to allow communication between users.

21. The automated self-storage management system of claim 2 further comprising a letter generation feature.

5 22. The automated self-storage management system of claim 21 wherein upon occurrence of a predetermined criteria, the system generates a customer letter.

10 23. The automated self-storage management system of claim 22 wherein the letter pertains to an overdue fee.

24. The automated self-storage management system of claim 22 wherein the letter pertains to a rate increase.

15 25. The automated self-storage system of claim 22 wherein the letter pertains to an eviction.

26. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

20 an inventory information capture having information pertaining to self-storage units;

a customer information capture having information pertaining to customers; and

25 an auction manager feature in communication with inventory information capture and customer information capture.

30 27. The automated management system of claim 26 wherein the auction manager comprises a customer notifier that generates a notice to customers regarding an auction.

28. The automated management system of claim 26 wherein the auction manager comprises a facility notifier that

generates a notice to a plurality of facilities regarding an auction.

5 29. An automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

 an inventory information capture having information pertaining to self-storage units;

10 a customer information capture having information pertaining to customers; and

 an auction manager feature in communication with inventory information capture and customer information capture, wherein the auction manager comprises a customer notifier that generates a notice to customers regarding an
15 auction and a facility notifier that generates a notice to a plurality of facilities regarding an auction.

 31. An automated self-storage management system for enabling a user to conduct self-storage transactions, the
20 system comprising:

 an inventory information capture having information pertaining to self-storage units;

 a customer information capture having information pertaining to customers;

25 a rental transaction feature configured to create a rental agreement using information from the inventory information capture and the customer information capture, wherein the rental agreement involves a plurality of self-storage units, and

30 a reporting feature in communication with the inventory information capture and the customer information capture, wherein the reporting feature includes a revenue report.

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company?

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Internet
Explorer

FIG. 1

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User...
Change Password
Room/Truck Chart
Storage Messenger
Storage Note Pad
Training

Management...
Inventory Menu
Site Menu
Management Menu

Other Links...
U-Haul Dealer
U-Haul GM

Miscellaneous...
Program Feedback
Meet The Team

WebSelfStorage - MOJIBI, KATHY

Support Phone Number 1 877-626-4455



000 000 000 000
New Customer
20 000 000 MOVE IN
30 0000000 RESERVATION
Existing Customer
40 000 x 00000 TAKE A PAYMENT
50 000 00 MOVE OUT
60 000 100000 VIEW CONTRACT
70 000000 TRANSFER
Lookups
80 000 100000 OPEN CONTRACTS
90 x000000 AUTHORIZED ACCESS
x00000
'00 00000 000 REPORT LIST

[Log Out](#)

FIG. 2

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Customer Type

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Choose A Customer Type ~ 201

- 202 ☐ Business
- 203 ☐ Corporate
- 204 ☒ Individual
- 205 ☐ System Use

Cancel contract

(Access Key B)

next

(Access Key X)

FIG. 3

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Customer Search Engine

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
3	210	Search Customer Information					
212	214						
First Name:		Last Name:					

Enter At Least One Field Before Beginning Search

Cancel Contract	Back	Find
(Access Key C)	(Access Key F)	(Access Key K)
Advanced search		
(Access Key A)		
Main		
(Access Key M)		

FIG. 4

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Individual Customer Results

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
Individual Customer Results							
☒	JOE SMITH	(310)555-1212	123 PENNY LANE	LOS ANGELES	CA	90066	
☒	JOEL SMITH	(702)558-5119	803 ZINNIA CIR	HENDERSON	NV	89015	
☒	JOEY SMITH	(480)227-6676	249 E SCOTT AVE	GILBERT	AZ	85234	

☒ = Selects The Customer

Back Add
(Access Key: B) (Access Key: A)
Main
(Access Key: M)

F16.5

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Customer Information

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
	220	IMPORTANT, Please Verify Customer's Information!					
Individual Customer Information							
221	First Name:		JOE		Last Name:		SMITH
222	Address:		123 PENNY LANE			Apt No:	
	Address2:						
	City:		LOS ANGELES	State:	CA	Zip:	90066
223	Home Phone:		(310)	555	1212	Ext:	
	Work Phone:		()			Ext:	
224	SS# or Secondary ID:				CC Expiration Month/Year: /		
225	Driver Lic. or State ID:				State:	Exp Date: /	
226	Employer Name:				Phone: () -		
227	E-Mail Address:				JSMITH@AOL.COM		
228	Tax Exempt ☐ Number:						

Required Fields

Cancel Contract (Access Key C)	Back (Access Key B)	neXt (Access Key X)
Main (Access Key M)		

FIG. 6

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Alternate Contact List

Page 1 of 1

Customer **Contact** ²³⁰ Access Users Room Gate Access Payment Plan Invoicing Payment

To Assure Notification In Case Of Fire, Flood, Burglary or Break-In

Click The ADD Button To Create A New Contact

²³² **Add**
(Access Key A)

Cancel contract

(Access Key C)

Back

(Access Key B)

Main

(Access Key M)

FIG. 7

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Individual Alternate Contact

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

To Assure Notification In Case Of Fire, Flood, Burglary or Break-In

233 { First Name:
Last Name:

234 Phone No: () - Ext:

235 { Address:
City: State: Zip:

236 E-Mail Address:

Required Fields

(Access Key B) (Access Key S)

FIG. 8

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Authorized Access Individuals

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
240 ~ Authorized Access Individual							
241	First Name:						
	Last Name:						
242	Phone No: () - Ext:						
243	Address:						
	City: State: Zip:						
Required Fields							
BackSave (Access Key: B) (Access Key: S)							

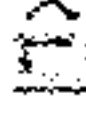
FIG. 9

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Authorized Access Individuals

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
247 245	244	Authorized Access Individuals					
✓	✓	NAME	PHONE	ADDRESS	CITY	STATE	ZIP
✓	✓	JOE SMITH					
✓	✓	JANE SMITH					

 = Edits The Individual's Record  = Delete The Individual's Record

Add
(Access Key: A)
246

Cancel contract
(Access Key: C)

Back
(Access Key: B)

neXt
(Access Key: X)

Main
(Access Key: M)

FIG. 10

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Selected Rooms

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
----------	---------	--------------	------	-------------	--------------	-----------	---------

250 Available Rooms

Input The Desired Room # Add

252 (Access Key: A)

- or -

Select A Product Type 254

258 All
255 CRATE
RV
SPLIT LEVEL

Display list

(Access Key: D)

Select A Room Size 256

257 All
5X4X6
5X5X5
20X15X10

View list

(Access Key: V)

Type Room Number, Select Product Type, Or Select Room Size

Cancel contract Back

(Access Key: C) (Access Key: B)

FIG. 11

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Select Storage Room

Page 1 of 1

260

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

261 262 263 264 265

Select The Desired Room From The List Below

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
☐ 1525	5X4X6	CRATE	56 COVERED NOCLIMATE	\$180.00
☐ 1670	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16.00
☐ 189	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16.00
☐ 193	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16.00
☐ 195	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16.00
☐ 197	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16.00
☐ K0002	20X15X10	RV	99 STREET NOCLIMATE	\$17.00
☐ 1655	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1656	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1657	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1658	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1659	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1664	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1665	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1666	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1667	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1668	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1669	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1673	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1674	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1675	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1676	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1677	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1678	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1679	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1681	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1683	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1684	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1688	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1689	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18.00
☐ 1672	25X25X10	RV	1 STREET NOCLIMATE	\$44.95
☐ 9898	25X25X10	RV	1 STREET NOCLIMATE	\$44.95

☐ = Selects The Room

Back

(Access Key B)

FIG. 12

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Bill Date - Vacate Date - Room(s) Selected

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Input The Next Bill And Expected Vacate Date

Next Bill Date: 3 / 19 / 2002 206

Edit Date If Customer Request A Different Bill Date

Vacate Date: / / 207

Leave Blank If Vacate Date Is Not Known

Select Services To Be Attached To This Room

ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
1525	5X4X6	CRATE	56 COVERED NOCLIMATE	20	3/19/2002	\$180.00

IMPORTANT CUSTOMER ALERT:

If customer has not elected the SafeStor Protection they must READ and SIGN the Self-Storage Insurance Addendum. A copy of the signed addendum must be retained in their file.

☐ Check that Addendum has been completed

[Need Addendum form? Click to print](#)

DESCRIPTION

☐ SAFESTOR \$10,000

☐ SAFESTOR \$15,000

☐ SAFESTOR \$4,000

☐ ACCESS CARD REPLACEMENT

☐ \$10 DOLLAR DISCOUNT

☐ 1 MONTH FREE

☐ 20% SYSTEM MEMBER

☐ COLLEGE PROMOTION

☐ DUMPSTER 1/4TH

☐ DUMPSTER 1/4TH

☐ DUMPSTER 1/4TH

AMOUNT

\$18.00

\$24.00

\$6.00

\$10.00

(\$10.00)

(100.00)%

(20.00)%

(\$10.00)

\$16.75

\$17.50

\$19.00

Required Field

Back

Save

(Access Key: B) (Access Key: S)

FIG. 13

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Selected Rooms

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Available Rooms

Input The Desired Room #

Add

(Access Key A)

or -

Select A Product Type

All
CRATE
RV
SPLIT LEVEL

Display list

(Access Key: D)

Select A Room Size

All
5X5X5
20X15X10
20X20X8

View list

(Access Key: V)

Selected Room And Services Information

280	282	283	ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
			1525	5X4X6	CRATE	56 COVERED NOCLIMATE	20	2/19/2002	\$180.00
						RECURRING SERVICES			AMOUNT
			ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
			1670	5X5X5	CRATE	1 COVERED NOCLIMATE	25	2/19/2002	\$16.00
						RECURRING SERVICES			AMOUNT
			ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
			1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	400	2/19/2002	\$18.00
						RECURRING SERVICES			AMOUNT
			ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
			9898	25X25X10	RV	1 STREET NOCLIMATE	625	2/19/2002	\$44.95
						RECURRING SERVICES			AMOUNT

Type Room Number, Select Product Type, Or Select Room Size

⊕ = Add Services To Room ⊖ = Delete A Room And/Or Services

Cancel contract

(Access Key: C)

Back

(Access Key: B)

neXt

(Access Key: X)

F16.14

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Gate Access Security Codes

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

285

7

Gate Access Security Codes

PASSWORD	ZONE	ROOM	SIZE	PRODUCT	DESCRIPTION
286	1	1525	5X4X6	CRATE	56 COVERED NOCLIMATE
	1	1670	5X5X5	CRATE	1 COVERED NOCLIMATE
	1	1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE
	1	9898	25X25X10	RV	1 STREET NOCLIMATE

Required Fields

Cancel Contract

Back

neXt

(Access Key: C)

(Access Key: B)

(Access Key: X)

716.15

10/087, 193

Credit Card Auto Payment Plan

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Credit Card Auto Payment Plan List

USE THIS CREDIT CARD

VISA,4321321321321,05/02

None

VISA,4321321321321,05/02

None

ROOM	SIZE	PRODUCT	DESCRIPTION
1525	5X4X6	CRATE	56 COVERED NOCLIMATE
1670	5X5X5	CRATE	1 COVERED NOCLIMATE
1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE
9898	25X25X10	RV	1 STREET NOCLIMATE

Required Field

Add a credit card

(Access Key: A)

Cancel contract

(Access Key: C)

Back

(Access Key: B)

neXt

(Access Key: X)

FIG. 16

10/087,193

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
Auto Payment Credit Card Information (401)							
CARD TYPE	ACCOUNT NUMBER	EXP DATE	NAME ON CARD				
VISA	4321321321321	05 / 02	Joe Smith				
402	403	404	405				
Required Fields							
Back				Save			
(Access Key: B)				(Access Key: S)			

FIG. 17

10/08/1993

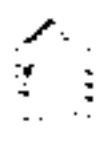
Auto Payment Credit Cards

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

410

Auto Payment Credit Cards

	CARD TYPE	ACCOUNT NUMBER	EXP DATE	NAME
 	VISA	4321321321321	05/02	JOE SMITH

 = Edits Credit Card Information  = Deletes Credit Card Information

412  Add
(Access Key A)

 Back
(Access Key B)

FIG. 18

10/087, 193

Invoice Billing

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

215 Choose Invoice Billing Cycle

BILLING CYCLE	ROOM	SIZE	PRODUCT	DESCRIPTION	WAIVE FEE
Auto Pay Room	1525	5X4X6	CRATE	56 COVERED NOCLIMATE	☐
216 MONTHLY	1670	5X5X5	CRATE	1 COVERED NOCLIMATE	☐
Auto Pay Room	1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	☐
217 QUARTERLY	9898	25X25X10	RV	1 STREET NOCLIMATE	☐

Required Field

(Monthly= \$2.00 Quarterly= \$10.00 Semiannual= \$15.00 Annual= \$20.00)

Back

neXt

(Access Key: B) (Access Key: X)

FIG. 19

10/087, 193

JOE SMITH -- Fee's Due

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
421 DUE	422 ROOM	425 DESCRIPTION	Fees Due				420 423 424 426 TOTAL
2/19/2002	1525	RENT			\$180.00	1 \$6.30	\$186.30
2/19/2002	1685	RENT			\$18.00	1 \$0.63	\$18.63
2/19/2002	9898	RENT			\$44.95	1 \$1.57	\$46.52
2/19/2002	1670	RENT			\$16.00	1 \$0.56	\$16.56
Balance Due:							\$268.01

☐ = Waives Fees

432 Add future (Access Key: A)	430 Take payment (Access Key: T)	434 Sales Items (Access Key: S)	Write-off (Access Key: W)
Ledger (Access Key: L)		Main (Access Key: M)	

FIGURE 20

10/087, 193

Add Sales Item

Page 1 of 1

Sales Item Selection Page

Select A Room To Add A Sales Item Too

	ROOM	SIZE	PRODUCT	DESCRIPTION
438	☐ 1525	5X4X6	CRATE	56 COVERED NOCLIMATE
	☐ 1670	5X5X5	CRATE	1 COVERED NOCLIMATE
	☐ 1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE
	☐ 9898	25X25X10	RV	1 STREET NOCLIMATE

Select The Sales Item To Add Below

	PART NO.	DESCRIPTION	QTY	RATE
436	☒ 100	COOL LOCKS	0	\$50.95
	☐ 101	REAL MUD PIES	499	\$5.00
437	☐ 102	PYTHON SNAKES	3	\$299.95
	☐ 103	CAN OPENERS	100	\$19.95
	☐ 104	1 FREE HAND CAR WASH	1	\$59.95

Cancel

Save

FIG. 21

10/087,193

Select Room(s) To Take A Payment

Page 1 of 1

440

442

Select Room(s) To Take A Payment					
ROOM	SIZE	PRODUCT	DESCRIPTION	PAID THRU RATE	
☒ 1525	5X4X6	CRATE	56 COVERED NOCLIMATE	2/19/2002	\$180.00
☒ 1670	5X5X5	CRATE	1 COVERED NOCLIMATE	2/19/2002	\$16.00
☒ 1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	2/19/2002	\$18.00
☐ 9898	25X25X10	RV	1 STREET NOCLIMATE	2/19/2002	\$44.95

Check The Box Of The Room or Rooms For Which You Are Taking Payment

Back neXt
(Access Key: B) (Access Key: X)

FIG. 22

10/08/2003

Fee's Not Collected

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
444 Fees Due							
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
2/19/2002	1670	RENT	\$16.00	1	\$0.56	\$16.56	
2/19/2002	1525	RENT	\$180.00	1	\$6.30	\$186.30	
2/19/2002	1685	RENT	\$18.00	1	\$0.63	\$18.63	

Balance Due: \$221.49

IMPORTANT CUSTOMER ALERT:

If customer has not previously purchased SafeStor remind them that U-Haul does not insure their goods. Ask them about *SafeStor*

If customer is electing to discontinue SafeStor coverage they must READ and SIGN the Storage Insurance Addendum requesting a waiver. A copy of the signed Storage Insurance Addendum (waiver) must be retained in their file. [Need Addendum form? Click to print.](#)

Select Payment Type 450

Payment Type: CREDIT

Required Field

Back

neXt

(Access Key B) (Access Key X)

F16 23

10/08/193

Cash Payment

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

452 ~ Cash Payment

Cash Amount	
Amount Collected:	
Total Due:	\$221.49
Change:	0.00
☐ Apply Change As Credit To Account	

458

454

456

Required Field

Back Cancel Save
(Access Key: B) (Access Key: C) (Access Key: S)

FIG. 24

10/08/2003

Check Payment

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing **Payment**

460 ~ Check Information

Customer's Check	
461 — Check Type:	Choose v
462 — Check Number:	Amount: 4685
463 — Bank Number:	Account Number:

464

Required Fields

Back	Cancel	Save
------	--------	------

(Access Key: B) (Access Key: C) (Access Key: S)

FIG. 25

10/08/1993

Coupon Payment

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

466 ~ Coupon Payment

Coupon	
	Total Due: \$221.49
467 ~ Type:	Choose
468 ~ Coupon Number:	
469 ~ Amount Collected:	

Required Fields

Back	Cancel	Save
(Access Key B)	(Access Key C)	(Access Key S)

FIG - 26

10/087,193

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

470 ~ Credit Card Payment

Credit Card		
471	Card Type:	Choose ▾ Total Due: 5221.49
472	Account Number:	
473	Name On Credit Card:	
474	Expiration Date:	/
475	Amount Collected:	

Required Fields

Back	Cancel	Save
------	--------	------

(Access Key B) (Access Key C) (Access Key S)

FIG. 27

10/087,193

Money Order Payment

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing **Payment**

476

Money Order Payment

Money Order	
477	Order Number:
478	Amount Collected:
	Total Due: \$221.49
479	Change: 0.00
458	☐ Apply Change As Credit To Account

Required Fields

Back	Cancel	Save
(Access Key: B)	(Access Key: C)	(Access Key: S)

Fig. 28

10/087,193

JOE SMITH -- Fee's Due

Page 1 of 1

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
480 ~ Fees Due							↑
DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL	
2/19/2002	9898	RENT	\$44.95	1	\$1.57	\$46.52	
Balance Due:							\$46.52

U = Waives Fees

Add future	Take payment	Sales Items	Write-off
(Access Key: A)	(Access Key: T)	(Access Key: S)	(Access Key: W)

482 ~ Payments Collected

TYPE	NUMBER	EXP. DATE	AMOUNT
MO	1234	1	\$221.49

490 ~		Total Paid:	\$221.49
Ledger	Main		
(Access Key: L)	(Access Key: M)		

FIG. 29

19/087,193

JOE SMITH - Room/Payment History

Page 1 of 1

470

Room/Payment History

Contract No 990019 00000000 Customer: JOE SMITH

500 Show Me 490 Order 199 Show Rooms Balance Due 497 \$46.52

60 Days Ascending ALL

PAID	DUE	THRU	ROOM	DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE	
491	✓	2/19/2002	3/18/2002	1670	RENT	\$16.00	1	\$0.56	\$16.56	\$16.56
	✓	2/19/2002	3/18/2002	9898	RENT	\$44.95	1	\$1.57	\$46.52	\$63.08
	✓	2/19/2002	3/18/2002	1525	RENT	\$180.00	1	\$6.30	\$186.30	\$249.38
	✓	2/19/2002	3/18/2002	1685	RENT	\$18.00	1	\$0.63	\$18.63	\$268.01
492	\$	2/19/2002		MONEY ORDER				(\$221.49)	\$46.52	

\$ = View Payment Detail ✓ = Paid In Full ○ = Reversed Charge = Waives Selected Fee

496 494 495 497

Take payment Main

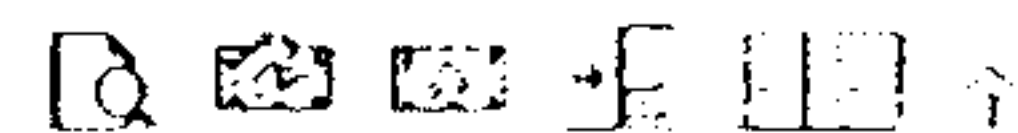
(Access Key: T) (Access Key: M)

FIG. 30

10/087, 192

WebSelfStorage

RENTAL AGREEMENT



CONTRACT BALANCE DUE: \$46.52

ACCOUNT TYPE: INDIVIDUAL

CONTRACT NO: 990019-00000000

Customer Information									
First Name JOE	Last Name SMITH	Driver's License Number	State	Expiration Date					
Street Address 123 PENNY LANE		City LOS ANGELES	State CA	Zip 90066	Social Security Number				
Home Phone (310)555-1212	Work Phone	Employer's Name			Employer's Phone				
Alternate Contact									
Last Name SMITH		First Name JOE		Home Phone					
Street Address		City		State	Zip				
Authorized Access Person(s)									
Last Name SMITH	First Name JOE	Last Name SMITH	First Name JANE	Last Name	First Name				
Room Information									
Room	Size	Status	Autopay	Bal Due	Moved In	Next Due	Access Code	Invoice Billing	Rate
1525	5X4X6	CURRENT	YES	\$0.00	2/19/2002	3/19/2002	32	NO	\$180.00
1670	5X5X5	CURRENT	NO	\$0.00	2/19/2002	3/19/2002	43	MONTHLY	\$16.00
1685	20X20X8	CURRENT	YES	\$0.00	2/19/2002	3/19/2002	54	NO	\$18.00
9898	25X25X10	DELINQUENT	NO	\$46.52	2/19/2002	2/19/2002	65	QUARTERLY	\$44.95
Services									
Description	Start Date		Room	Next Due		Amount			
Credit Card Payment Plan - Optional									
Room	Size	Type	Card Number			Expiration Date			
1525	5X4X6	VISA	4321321321321			05/02			
1685	20X20X8	VISA	4321321321321			05/02			
Room/Payment History									
Pay Date		Receipt Number		Type	Number	Auth Code		Amount	
2/19/2002 7:07:02 PM				MIO	1234			\$221.49	
Notes									

Cancel contract

(Access Key: C)

FIG. 31

10/087,193

Customer Search Engine

Page 1 of 1

Customer	Location	Room	Move In Date	Payment
8	210			

Search Customer Information

First Name: Last Name:

Enter At Least One Field Before Beginning Search

Clear Reservation (Access Key C)	Find (Access Key F)	sKip (Access Key K)
Advanced search (Access Key A)		
Main (Access Key M)		

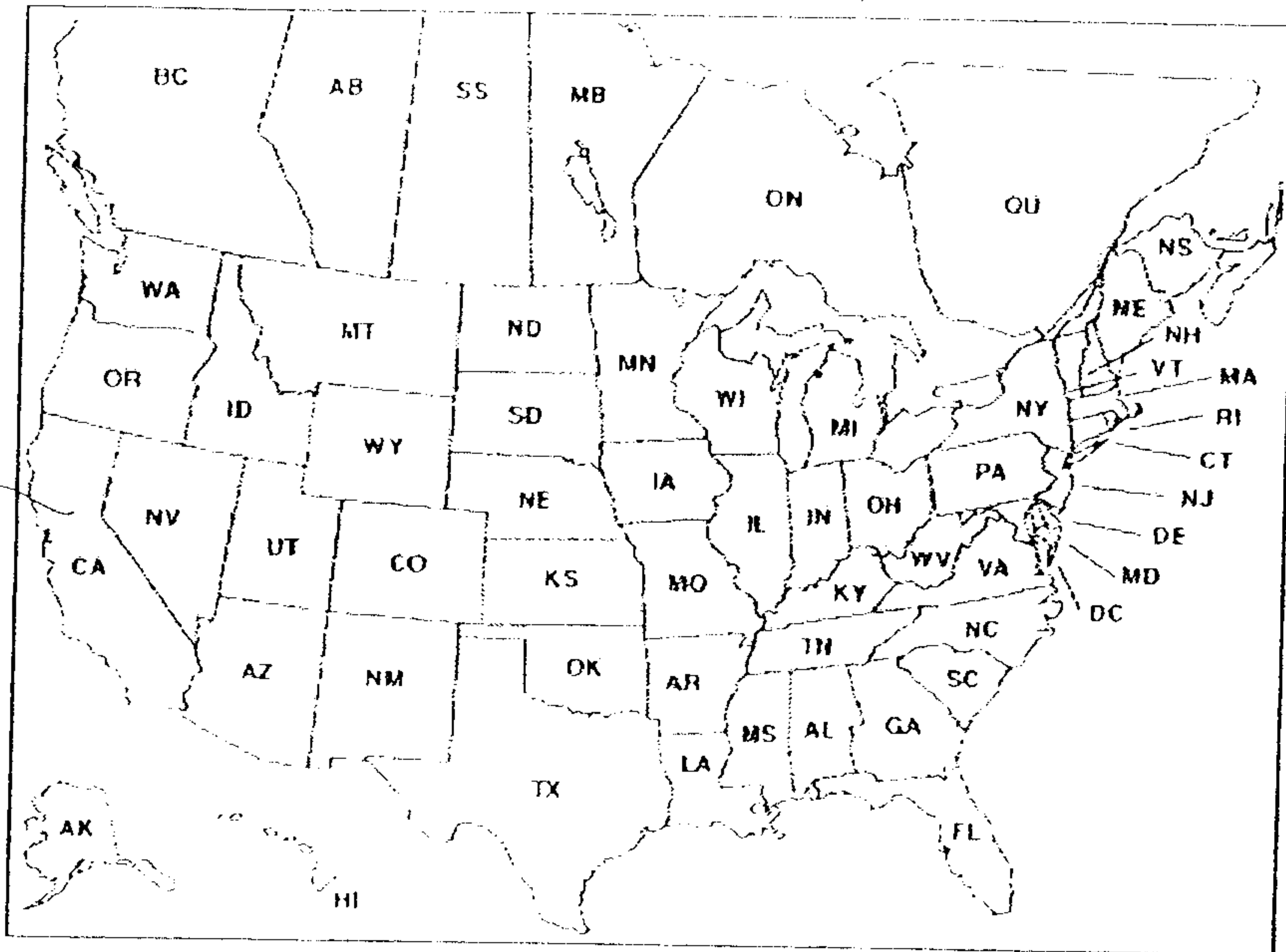
FIG. 32

10/087,193

301 Customer Location Room Move-In Date Payment

Key In The Entity/State or Select The State To Choose A Location Below

Entity: or - State:



Clear reservation

(Access Key C)

Back

(Access Key B)

neXt

(Access Key X)

Main

(Access Key M)

FIG. 33

10/087, 193

Customer	Location	Room	Move-In Date	Payment
303	CA - Choose A City From The List Below			
	<u>ALTADENA</u>	<u>ANAHEIM</u>	<u>BAKERSFIELD</u>	
	<u>BARSTOW</u>	<u>BELMONT</u>	<u>BURBANK</u>	
	<u>CANYON COUNTRY</u>	<u>CARLSBAD</u>	<u>CATHEDRAL CITY</u>	
	<u>CHATSWORTH</u>	<u>CHICO</u>	<u>CHULA VISTA</u>	
	<u>CITY OF INDUSTRY</u>	<u>CORONA</u>	<u>COVINA</u>	
	<u>DUBLIN</u>	<u>EL CAJON</u>	<u>EL CENTRO</u>	
	<u>ESCONDIDO</u>	<u>FONTANA</u>	<u>FREMONT</u>	
	<u>FULLERTON</u>	<u>GARDEN GROVE</u>	<u>GARDENA</u>	
	<u>GLENDALE</u>	<u>GLENDORA</u>	<u>INGLEWOOD</u>	
	<u>LA HABRA</u>	<u>LANCASTER</u>	<u>LEMON GROVE</u>	
	<u>LIVERMORE</u>	<u>LODI</u>	<u>LONG BEACH</u>	
	<u>LOS ANGELES</u>	<u>LOS ANGELES NORTH</u>	<u>LYNWOOD</u>	
	<u>NORTHRIDGE</u>	<u>OCEANSIDE</u>	<u>ONTARIO</u>	
	<u>PASADENA</u>	<u>POMONA</u>	<u>POWAY</u>	
	<u>REDWOOD CITY</u>	<u>RIALTO</u>	<u>ROSEMEAD</u>	
	<u>SACRAMENTO EAST</u>	<u>SACRAMENTO WEST</u>	<u>SAN BERNARDINO</u>	
	<u>SAN CLEMENTE</u>	<u>SAN DIEGO</u>	<u>SAN FRANCISCO</u>	
	<u>SAN JOSE</u>	<u>SANTA ANA</u>	<u>SANTA BARBARA</u>	
	<u>SANTA ROSA</u>	<u>SEPULVEDA</u>	<u>SPRING VALLEY</u>	
	<u>STOCKTON</u>	<u>TUSTIN</u>	<u>UKIAH</u>	
	<u>VACAVILLE</u>	<u>WESTMINSTER</u>	<u>WHITTIER</u>	

Clear Reservation

(Access Key C)

Back

(Access Key B)

Main

(Access Key M)

F16.34

10/087,193

Storage Locations

Page 1 of 1

304

Customer	Location	Room	Move-In Date	Payment
NORTHRIDGE, CA - Choose A Location From The List Below				
%OCC	ENTITY	NAME	ADDRESS	PHONE
☒ 96 88% ☐	711085	U-HAUL NORTHRIDGE	18160 PARTHENIA ST	(818)993-7470

☒ = Entity Does Accept Remote Reservations ☐ = Entity Does Not Accept Remote Reservations

Clear Reservation

Back

(Access Key: C)

(Access Key: B)

Main

(Access Key: M)

F16.35

10/087, 193

Available Rooms

Page 1 of 1

Customer Location Room Move-In Date Payment

Selected Rooms

SIZE PRODUCT FL ELEV CLIMATE BONUS SQ.FT. RATE
2 10X5X9 INTERIOR 0 STREET CLIMATE 50 \$84.95

Move-In Date: 3/1/2002

Available Rooms

room/truck equivalency chart

306
307 308 309 310 311 312 313 314 315
SIZE PRODUCT FL ELEV CLIMATE BONUS SQ.FT. VACANT % OCC RATE
4X10X9 INTERIOR 0 STREET CLIMATE 40 0 100% \$69.95
4X10X12 INTERIOR 3 STREET CLIMATE 40 0 100% \$69.95
5X5X9 INTERIOR 1 STREET CLIMATE 25 0 100% \$74.95
5X5X9 INTERIOR 3 STREET CLIMATE 25 0 100% \$64.95
5X10X9 INTERIOR 0 STREET CLIMATE 50 0 100% \$84.95
5X10X9 INTERIOR 1 STREET CLIMATE 50 0 100% \$99.95
5X10X9 INTERIOR 2 STREET CLIMATE 50 1 99% \$84.95
5X10X12 INTERIOR 3 STREET CLIMATE 50 6 95% \$84.95
9X8X9 INTERIOR 0 STREET CLIMATE 72 0 100% \$89.95
10X5X9 INTERIOR 0 STREET CLIMATE 50 1 90% \$84.95
10X5X9 INTERIOR 2 STREET CLIMATE 50 0 100% \$84.95
10X5X12 INTERIOR 3 STREET CLIMATE 50 0 100% \$84.95
10X10X9 INTERIOR 0 STREET CLIMATE 100 4 95% \$149.95
10X10X9 INTERIOR 1 STREET CLIMATE 100 0 100% \$164.95
10X10X9 INTERIOR 2 STREET CLIMATE 100 1 98% \$149.95
10X10X12 INTERIOR 3 STREET CLIMATE 100 5 91% \$149.95
10X15X9 INTERIOR 0 STREET CLIMATE 150 0 100% \$204.95
10X15X9 INTERIOR 1 STREET CLIMATE 150 0 100% \$219.95

(Room Size Dimensions are in Width x Length x Height Format)

Clear Reservation

Back

neXt

(Access Key: C)

(Access Key: B)

(Access Key: X)

F16. 36

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Page 1 of 1

Reservation Date

Customer Location Room Move-In Date Payment

Selected Size

SIZE	PRODUCT	FLOOR	ELEV	CLIMATE	BONUS	SQ.FT.	RATE
10X5X9	INTERIOR	0	STREET	CLIMATE		50	\$84.95

Input The Move-In Date

Date: / /

32.0

Required Fields

Cancel

Save

(Access Key: C) (Access Key: S)

116-37

10/08/97, 192

Lookup A Contract

Page 1 of 1

Contract/Reservation Search Engine

Type: View Cancelled Contracts: ☐

Contract Number: ⁴²

Storage Unit: ⁴³

First Name: Last Name:

Phone Number: () -

Credit Card Number: ⁴⁴

Business Name:

Corporate Account #:

System Use Entity Number:

Receipt Number: ⁴⁶

Reservation Cancellation#:

Required Fields

Enter At Least One Field Before Beginning Search

Back

Find

(Access Key B) (Access Key F)

FIG. 38

10/087193

Selected Rooms

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Available Rooms

Input The Desired Room #

Add

(Access Key: A)

- or -

Select A Product Type

All
CRATE
RV
SPLIT LEVEL

Display list

(Access Key: D)

Select A Room Size

All
5X4X6
5X5X5
5X5X8

View list

(Access Key: V)

Selected Room And Services Information

	ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
501	179	5X5X8	SPLIT LEVEL	2 STREET NOCLIMATE	25	1/27/2002	\$91.00
502				RECURRING SERVICES			AMOUNT

⊞ = Add Move Out Services To Room ⊞ = Move Out Of Room / Delete A Service

Back

(Access Key: B)

FIG. 39

10/087,193

Transfer Out rooms available

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment
701



Select A Room And Any Service(s) To Transfer Out

ROOM	SIZE	PRODUCT	DESCRIPTION	BALANCE	RATE
☒ 195	5X5X5	CRATE	1 COVERED NOCLIMATE RECURRING SERVICES	\$0 00	\$16 00

\$ = Takes Payment ☒ = Selects Room

Main
(Access Key M)

FIG. 40

10/087, 193

Transfer in rooms available

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Select A Room From The List Below To Transfer In

ROOM	SIZE	PRODUCT	Transfer Out Room DESCRIPTION	RATE
195	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16 00

702

Transfer In Rooms Available				
ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
☐ 131	5X5X8	SPLIT LEVEL	2 STREET NOCLIMATE	\$91 00
☐ 1668	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18 00
☐ 1672\	25X25X10	RV	1 STREET NOCLIMATE	\$44 95
☐ 1684	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18 00
☐ 1685	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18 00
☐ 1688	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18 00
☐ 1689	20X20X8	SPLIT LEVEL	1 STREET NOCLIMATE	\$18 00
☐ 179	5X5X8	SPLIT LEVEL	2 STREET NOCLIMATE	\$91 00
☐ 189	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16 00
☐ 197	5X5X5	CRATE	1 COVERED NOCLIMATE	\$16 00
☐ 25689	6X6X654	CRATE	ASD COVERED NOCLIMATE	\$59 00
☐ TESTX03	5X4X6	CRATE	56 COVERED NOCLIMATE	\$180 00

☐ = Selects Room

Back

(Access Key B)

F16-41

10/087,193

Transfer out and transfer in room balances

Page 1 of 1

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Balance of Transfer Out And Transfer In Rooms

Transfer Out Room

ROOM SIZE	PRODUCT	DESCRIPTION	RATE	QTY	TAX	ADJUSTED CREDIT
195	5X5X5 CRATE	1 COVERED NOCLIMATE	\$16.00	0.12	\$0.07	(\$1.99)
Adjusted Room Credit:						(\$1.99) ~ 703

Transfer In Room

ROOM SIZE	PRODUCT	DESCRIPTION	RATE	QTY	TAX	ADJUSTED CHARGE
Add Future Months By Changing the Quantity For The Room [New Qty = 0.12]						
131	5X5X8 SPLIT LEVEL	2 STREET NOCLIMATE	\$91.00	0.12	\$0.38	\$11.30
Adjusted Room Charge:						\$11.30 ~ 704
Balance Due:						\$9.31

Transfer room

(Access Key T)

Cancel contract

(Access Key C)

Back

(Access Key B)

F16.42

10/08/2003

Report List

Page 1 of 1

Storage Report List

Audit Reports

Auto Payment Customers

Cash Drawer Summary

Collection Worksheet

Current Open Contracts

Downloaded Reservations

Expiring Credit Cards

Facility Utilization Summary

Failed Auto Payments

Invoicing Customers

Lock Action

Move Out

Nightly Batch Letters

Nightly Batch Status

No Show Reservations

Rent Roll

Rooms Available

Rooms With Adjusted Rates

Rooms To Auction

SAFESTOR Coverage

Security Access Codes

Security Access In/Out

Unit Mix

Unit Price List

Walk Around

Who Is Logged In

Click On An Underlined Title To View The Report

Close

FIG. 43

10/087, 193

Room Inventory -- 990019

Page 1 of 3

FIG 44

Room Inventory

Entity: 990019

801

802

803

1 100 | 101-200 | 201-300 | 301-400 | 401-432 | All

804

805

Date: 2/26/2002

806

ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
0001 2X2X2	3 STREET HEATED	OCCUPIED		\$33.00
001 1X1X2	1 COVERED NOCLIMATE	OCCUPIED		\$4.00
002B 1X1X2	1 COVERED NOCLIMATE	OCCUPIED		\$4.00
0922 5X5X8	2 STREET NOCLIMATE	OCCUPIED		\$91.00
1 9X9X9	6 STREET NOCLIMATE	DELINQUENT		\$120.00
1001 5X5X8	2 STREET NOCLIMATE BONUS	LIEN		\$91.00
1003 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
1004 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
1005 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT	318, 327	\$91.00
1006 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
1007 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
1008 5X5X8	2 STREET NOCLIMATE BONUS	OCCUPIED		\$91.00
1009 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
100A 2X2X2	3 STREET HEATED	OCCUPIED		\$33.00
100CM 5X4X6	56 COVERED NOCLIMATE	DELINQUENT	101PR, 102PR	\$180.00
100X 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
101 5X5X8	2 STREET NOCLIMATE BONUS	OCCUPIED		\$91.00
1010 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
1011 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
101X 5X5X8	2 STREET NOCLIMATE BONUS	LIEN		\$91.00
102365 2X3X4	1 STREET NOCLIMATE	DELINQUENT		\$61.00
102X 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
103X 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
105X 5X5X8	2 STREET NOCLIMATE BONUS	OCCUPIED		\$91.00
106X 5X5X8	2 STREET NOCLIMATE BONUS	OCCUPIED		\$91.00
107 5X5X8	2 STREET NOCLIMATE BONUS	DELINQUENT		\$91.00
108X 5X5X8	2 STREET NOCLIMATE BONUS	DAMAGED		\$91.00
109X 5X5X8	2 STREET NOCLIMATE BONUS	DAMAGED		\$91.00
11 7X27X7	1 STREET CLIMATE BONUS	OCCUPIED		\$120.00
111 10X10X11	11 STREET NOCLIMATE	DELINQUENT		\$16.00
11111 2X2X2	3 STREET HEATED	DELINQUENT		\$33.00
1112 4X3X4	1 STREET NOCLIMATE	DELINQUENT		\$61.00
1113 5X5X5	2 COVERED NOCLIMATE	DELINQUENT		\$61.00
1114 5X20X10	1 STREET NOCLIMATE	DELINQUENT	157, 2112	\$90.00
113 5X20X10	1 STREET NOCLIMATE	DELINQUENT		\$90.00
114 10X20X8	1 STREET NOCLIMATE	OCCUPIED		\$16.50
115 10X10X8	1 STREET NOCLIMATE	DELINQUENT		\$20.00

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Set Rates And View Facility Info By Sizecode

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Facility Utilization For Entity 990019 By Sizecode

Size	Facility Utilization				New Rates		Rate Change Reason		822	823	824	828
	811	812	813	814	815	816	817	818				
	Sqft	#	Occ	Vac	%	Rate	New	Rate	819	820	821	825
	Rm	Rms	Occ	Vac	%	Rate	New	Rate	Per	Per	Per	Per
	Inc	Inc	Sqft	Sqft	Inc	Inc	Inc	Inc	Inc	Inc	Inc	Inc
\$ 1X1X1 S C NOC BONUS	1	2	2	0	100.00%	\$35.00	0.00		\$70.00	\$0.00	\$35.00	\$0.00
\$ 1X1X100 C NOC	1	3	3	0	100.00%	\$170.00	0.00		\$510.00	\$0.00	\$170.00	\$0.00
\$ 1X1X21 C NOC	1	8	8	0	100.00%	\$4.00	0.00		\$32.00	\$0.00	\$4.00	\$0.00
\$ 1X1X99 99 C NOC BONUS	1	3	3	0	100.00%	\$110.00	0.00		\$330.00	\$0.00	\$110.00	\$0.00
\$ 2X2X2 S S NOC	4	5	5	0	100.00%	\$4.00	0.00		\$20.00	\$0.00	\$1.00	\$0.00
\$ 2X2X23 S HEA	4	15	15	0	100.00%	\$33.00	0.00		\$495.00	\$0.00	\$8.25	\$0.00
\$ 2X3X41 S NOC	6	4	4	0	100.00%	\$61.00	0.00		\$244.00	\$0.00	\$10.17	\$0.00
\$ 2X4X61 C NOC	8	0	0	0	0.00%	\$4.00	0.00		\$0.00	\$0.00	\$0.50	\$0.00
\$ 4X3X41 S NOC	12	5	5	0	100.00%	\$61.00	0.00		\$305.00	\$0.00	\$5.08	\$0.00
\$ 5X4X656 C NOC	20	10	9	1	90.00%	\$180.00	0.00		\$1,800.00	\$0.00	\$9.00	\$0.00
\$ 5X5X52 C NOC	25	5	5	0	100.00%	\$61.00	0.00		\$305.00	\$0.00	\$2.44	\$0.00
\$ 5X5X51 C NOC	25	40	38	2	95.00%	\$16.00	0.00		\$640.00	\$0.00	\$0.64	\$0.00
\$ 5X5X82 S NOC BONUS	25	67	64	3	95.52%	\$91.00	0.00		\$6,097.00	\$0.00	\$3.64	\$0.00
\$ 5X5X82 S NOC	25	85	84	1	98.82%	\$91.00	0.00		\$7,735.00	\$0.00	\$3.64	\$0.00
\$ 5X5X1555 C NOC BONUS	25	0	0	0	0.00%	\$16.00	0.00		\$0.00	\$0.00	\$0.64	\$0.00
\$ 5X8X10751 C NOC	40	0	0	0	0.00%	\$60.00	0.00		\$0.00	\$0.00	\$1.50	\$0.00
\$ 5X10X851 C NOC	50	0	0	0	0.00%	\$10.00	0.00		\$0.00	\$0.00	\$0.80	\$0.00
\$ 5X20X101 S NOC	100	0	0	0	0.00%	\$90.00	0.00		\$0.00	\$0.00	\$0.90	\$0.00
\$ 6X6X66 S NOC	36	0	0	0	0.00%	\$9.00	0.00		\$0.00	\$0.00	\$0.25	\$0.00
\$ 6X6X8105 CLI BONUS	36	0	0	0	0.00%	\$60.00	0.00		\$0.00	\$0.00	\$1.67	\$0.00
\$ 6X6X8666 C NOC	36	0	0	0	0.00%	\$120.00	0.00		\$0.00	\$0.00	\$3.33	\$0.00
\$ 6X6X654 ASD C NOC	36	0	0	0	0.00%	\$59.00	0.00		\$0.00	\$0.00	\$1.64	\$0.00
\$ 7X5X121 E CLI	35	4	4	0	100.00%	\$16.00	0.00		\$64.00	\$0.00	\$0.46	\$0.00
\$ 7X27X71 S CLI BONUS	189	0	0	0	0.00%	\$120.00	0.00		\$0.00	\$0.00	\$0.63	\$0.00
\$ 12X12X121 C NOC	144	0	0	0	0.00%	\$16.99	0.00		\$0.00	\$0.00	\$0.12	\$0.00
\$ 20X15X1099 S NOC	300	0	0	0	0.00%	\$17.00	0.00		\$0.00	\$0.00	\$0.06	\$0.00
\$ 20X20X81 S NOC	400	0	0	0	0.00%	\$18.00	0.00		\$0.00	\$0.00	\$0.05	\$0.00
\$ 20X25X99 S NOC	500	0	0	0	0.00%	\$19.00	0.00		\$0.00	\$0.00	\$0.04	\$0.00
\$ 25X25X101 S NOC	625	0	0	0	0.00%	\$44.95	\$0.00		\$0.00	\$0.00	\$0.07	\$0.00
\$ 65X6X96 C NOC	390	0	0	0	0.00%	\$100.00	0.00		\$0.00	\$0.00	\$0.26	\$0.00
Summary	4231	256	249	7		\$3,069.44	\$0.00	\$18,647.00	\$0.00	\$393.42	\$0.00	\$18,071.00
									Reset		Update	

\$ = View Rate History For Sizecode

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852

3. Type Your Message Below. Click SAVE When Ready To Send

Enter Data In These Fields

Select An MCO Or Type An Entry Click Ok To Display The List of People Working At This Entry

Back

Save

854

FIG. 46

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860

Letter Templates For California

2ND STAGE
4TH STAGE DEL
AUCTION RESULTS
AUTOPAYMENT
EVICTON NOTICE
INVOICING
LATE NOTICE
LIEN SALE
OPTION LETTER
OVERPAYMENT
PARTIAL PAYMENT
RATE CHANGE
ROOM # CHANGE
SALE AND SEIZURE
TAX CHANGE
UNDERPAYMENT

Click Underlined Title To View Letter

[Previous](#)

[Add](#)

[Replicate](#)

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Letter Template

Fields	Letter Name: LIEN SALE	Entity Printable ☐
AUCTION	<<EntityLabel>>	
AuctionDate	Date: <<TodayDate>><div align=center>LIEN	
AuctionProcTot	SALE</div>	
AuctionResScrip		
CUSTOMER	<<CustomerLabel>>	
CustAddress	Dear <<CustomerName>>,	
CustomerLabel	Your right, as occupant, to use and access storage	
CustomerName	room #<<RmNumber>> has been terminated, and the	
DATE	contractual landlord's lien contained in the Self-	
InvoiceDate	Storage Rental Agreement has been imposed.	
LastPayDate		
NewRateEffDate		

Input a Valid WebSelfStorage Entity.

Entity: [View](#)

Type Letter In Text Area Above.

Double-Click The FIELD NAME In The List On The Left To Add It To The Letter

Required Information

[Previous](#)

[Delete](#)

[Save](#)

FIG. 4 8

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880
}

Site Business Rules For 990019 3

FIG. 49A

☐ Deactivated Entity

Rent Rules	
What letter do you want to use for room number changes?	ROOM # CHANGE
Rent applied on:	MOVE IN DATE (ANNIVERSARY)
If calendar day is used, what day of the month do you want charges posted?	1
Would you like to provide invoice billing to your customers?	Yes
If yes, how many days before due date do you want to create the invoice?	40
Do you provide monthly billing?	Yes
If yes, how much will you charge for billing on a monthly basis?	\$2.00
If yes, what letter do you want to use?	INVOICING
Do you provide quarterly billing?	Yes
If yes, how much will you charge for quarterly billing?	\$10.00
If yes, what letter do you want to use?	INVOICING
Do you provide semiannual billing?	Yes
If yes, how much will you charge for billing on a semiannual basis?	\$15.00
If yes, what letter do you want to use?	INVOICING
Do you provide annual billing?	Yes
If yes, how much will you charge for billing on an annual basis?	\$20.00
If yes, what letter do you want to use?	INVOICING
Require the user to collect a vacate date from the customer?	No
Does location allow prorating Move-Ins?	No
Reservation Rules	
Allow the taking of reservations?	Yes
Allow the taking of REMOTE reservations?	Yes
How many days after expected move in do you want a reservation to no show?	90
How many days in the future will you allow a reservation to be made?	30
What reservation confirmation letter is used?	INVOICING
Green/Set Low Occupancy % - Okay to Make Reservations	0
Green/Set High Occupancy % - Okay to Make Reservations	96
Yellow/Set Low Occupancy % - Caution Making Reservations	97
Yellow/Set High Occupancy % - Caution Making	

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f16.49B

Reservations	98
Red Set Low Occupancy % - Do Not Make Reservations	99
Red Set High Occupancy % - Do Not Make Reservations	100
Do not allow reservations for a sizecode when available rooms are below this number.	1
How many days should quote be held before purging?	1
Customer Rules	
Is tax-exempt status available for tenants at this facility?	No
Do you charge an administration fee?	No
If yes, is it required?	Yes
If yes, is it reversible?	Yes
If yes, what is the administrative fee amount?	\$50.00
Move In Rules	
Do you require that new tenants provide an alternate contact?	Yes
Do you require addresses to be collected on alternate contacts?	No
Disable password prompt when saving a contract?	Yes
Do you allow business customer types?	Yes
Do you allow corporate customer types?	Yes
Do you allow individual customer types?	Yes
Do you allow system use customer types?	Yes
Payment Rules	
Do you allow customers to autopay their rooms?	Yes
If yes, what letter do you want to use for auto payments?	AUTOPAYMENT
Auto Authorization	
Are you running a credit card authorization system?	Yes
If yes, what type of credit card system are you running?	VERISIGN
What type of check system are you running?	NONE
Payment Types	
Do you accept cash?	Yes
Do you accept business checks?	Yes
Do you accept cashier's checks?	Yes
Do you accept personal checks?	Yes
Do you accept traveler's checks?	Yes
Do you accept coupons?	Yes
Do you accept American Express credit cards?	Yes
Do you accept Discover credit cards?	Yes

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Do you accept MasterCard credit cards?	Yes
Do you accept Visa credit cards?	Yes
Do you accept money orders?	Yes
Do you allow system use accounts?	Yes
Do you accept U-Haul Corporate Accounts?	Yes
Over/Partial Payment Rules	
Do you want to create an overpayment letter when customer overpays?	Yes
If yes, what day do you want to create this letter?	DAY OF PAYMENT
If yes, what letter do you want to use for this overpayment?	OVERPAYMENT
Do you want to create a partial pay letter when customer under pays?	Yes
If yes, what day do you want to create this letter?	Ten Days before next Payment
If you use one partial payment letter, which should it be?	PARTIAL PAYMENT
Rate Change Rules	
Do you want to apply rate changes to rented rooms?	Yes
If yes, how many day's notice must you give the customer before changing their rates?	1
If yes, at the time of move in, for how many days do you guarantee the current rate?	20
If yes, what letter do you want to use for rate change letters?	RATE CHANGE
Delinquency Rules	
How many delinquency steps do you use, not including Lien?	5
Miscellaneous Delinquency Rules	
Should services be dropped when a customer is delinquent?	Yes
Which delinquency schedule do you want to use?	DELINQUENCY FEES
Rate Percentage Rules	
If delinquent and room rent is less than \$ 40 charge this amount \$ 75	
If delinquent and room rent is between \$ 41 and \$ 100 charge this amount \$ 45 or 20 % of the rent, whichever is greater.	
If delinquent and room rent is greater than \$ 100 charge this amount \$ 60 or 50 % of the rent, whichever is greater.	
First Delinquency	
Number of days late before creating first delinquency letter and applying late fee?	2
What is the first late fee charge?	\$10.00
What letter is sent for the first delinquency?	1ST LATE NOTICE

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F16.49D

Second Delinquency	
Number of days late before creating second delinquency letter and applying late fee?	15
What is the second late fee charge?	\$1 00
What letter is sent for the second delinquency notice?	TEST ETTER 4
Third Delinquency	
Number of days late before creating third delinquency letter and applying late fee?	20
What is the third late fee charge?	\$0 00
What letter is sent for the third delinquency?	1ST LATE NOTICE
Fourth Delinquency	
Number of days late before creating fourth delinquency letter and applying late fee?	23
What is the four late fee charge?	\$1 00
What letter is sent for the fourth delinquency?	1ST LATE NOTICE
Fifth Delinquency	
Number of days late before creating fifth delinquency letter and applying late fee?	26
What is the fifth late fee charge?	\$0 00
What letter is sent for the fifth delinquency?	1ST LATE NOTICE
Lien Sale Notification	
Number of days late before a customer is in lien status?	30
What is the lien sale notice fee?	\$50 00
What letter is sent for the lien sale notification?	LIEN SALE
Auction Rules	
How many days after lien sale notice can the contents of the room be auctioned?	30
What letter do you want to use for auction-notification letters?	AUCTION NOTICE
Does your auction letters need to be printed manually?	Yes
What time is an auction usually held at this location? (including a.m./p.m.)	7 00 a.m.
What letter do you want to use to notify customers of their new balance after goods sold at auction?	INVOICING
Gate Access Rules	
What security gate access system do you use?	PTI FALCON
What is the default time zone value for the security gate system?	1
What is the name of your server machine?	STORAGE-IIS
Tax Rules	

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Fl6-49E

What is your STORAGE tax rate percentage?	035
What letter do you want to use for STORAGE tax rate changes?	TAX CHANGE TEST ONLY
What is your RETAIL tax rate percentage?	10
} Reporting	
For Facility Utilization Report how many delinquency steps do you use, not including Lien?	3
Number of days late before entering first step?	3
Number of days late before entering second step?	15
Number of days late before entering third step?	0
Number of days late before entering fourth step?	0
Number of days late before entering fifth step?	0
Number of days late before entering Lien?	30
↑ Miscellaneous	
Does this location Print Letters to Alternate Contact?	Yes
What is the Manager Name you want printed on Letters?	chris bierman
Use Site Maps?	Yes

Previous

Save

Replicate



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