

Migrating from RentPlus to Centershift Preparing for Implementation Part 2

Presented by
Michael Richards

President, Hi-Tech Smart Systems, Inc.

centershift



RentPlus

Self Storage Management Software

Preparing for Implementation Part 2

centershift



RentPlus

Self Storage Management Software

Preparing for Implementation Overview

- Part 1
 - Training
 - Accounting Software
 - Web Site Preparation
 - STORE Installation
 - Setup of the Organization
- Part 2
 - Site Setup
 - Final Preparations
 - Conversion Day
 - Managing the Changeover and its Impacts on the Organization

Preparing for Implementation Important Web Pages

- Main Centershift-RentPlus Information
www.hitechsoftware.com/rentplus/rentplus_centershift2.htm
- Webinars and other Documentation
www.hitechsoftware.com/rentplus/centershift_rentplus_webinars.htm
- On-Line Demonstration
www.hitechsoftware.com/rentplus/centershift_demo.htm

centershift



RentPlus

Self Storage Management Software

Preparing for Implementation Site Setup

- Site Identification
- Site Revenue Classes / GL Interface
- Retail – Site Items / Purchase Order
- Fees and Services
- Insurance Coverage Groups
- Site Rules
- Site specific letters (if any)
- Delinquency Schedule for site (Org level setup)
- Data is collected 1-2 weeks prior to conversion for letters setup and Data Integrity Check (if applicable)

Preparing for Implementation

Critical Site Rules

- Auto Reconcile Cash/Cash Drawer
- Mailing Central/Local
- External Integration (eStore)
- Accounting Method Set (Cash/Accrual)
- Credit Card Processing Rules
- Custom Letter Templates Set
- First of Month Rentals Pivot Date (New Rental)
- Partial Payment Rules Set

Preparing for Implementation

Final Preparations

- Gate setup
 - is gate software upgrade needed?
- PPI account setup (if applicable)
- Users/Permissions site specific setup
- Training is complete
- Web site changes ready (if applicable)

Preparing for Implementation

Pre-Conversion Resources

- Account Manager
 - Individual assigned right after agreement is signed
 - Single point of contact for all matters before and after conversion
 - Assists you through the training process
- Implementation Manager
 - Individual assigned to your account
 - Assists in Organization and Site Setup pre-conversion
 - Does the conversion of data from RentPlus to Store
 - Assists with post-conversion verification of data
- Customer Portal

centershift



RentPlus

Self Storage Management Software

Preparing for Implementation Conversion Day

- If not RentPlus Online then data will be collected the night before and sent to Hi-Tech. Hi-Tech will export the data and send to Centershift overnight.
- Centershift will import the data into the site that has been prepared

centershift



RentPlus

Self Storage Management Software

Preparing for Implementation

Conversion Day (continued)

- No live system for first few hours
- Stop RentPlus processing (instructions online)
- Try to Use RentPlus 'Read-Only'
 - If you do any data entry it will have to be redone in Store. Keep track of what you do and be very careful especially with card payments.

Preparing for Implementation Conversion Day (continued)

- When conversion is completed, your Implementation Manager will contact you to notify you that the site is ready.
- Login to Store and get started!

Preparing for Implementation

Conversion Day (continued)

- Post-Conversion Checklist
 - Verify Site Status is set to LIVE
 - Spot-check a number of past due and prepaid accounts
 - Verify that gate codes and keypad or time zones were converted properly
 - Verify that card processing is active
 - Verify other various settings

Preparing for Implementation

Conversion Day (continued)

- Post-Conversion Checklist (continued)
 - Run and verify Rent Roll report
 - Run and verify Autopay Detail report
 - Input un-converted data:
 - Reservations
 - Prospects
 - Tasks
 - Out-of-service Units
 - Vendors (if necessary)

Preparing for Implementation

Conversion Day (continued)

- Post-Conversion Checklist (continued)
 - Set Gate Controller and default settings
 - Verify gate interface is working
 - Check Retail Quantities on Hand (Adjust as necessary)
 - Initialize cash drawer value
- Turn off necessary features in RentPlus
 - Card processing, gate interface, etc.
 - See Instructions Online
- Hi-Tech will disable the site's Paycenter account

Preparing for Implementation Conversion Day (continued)

- Be prepared!
- Be organized!
- Have extra staff available if possible

Preparing for Implementation Managing the Changeover

- Organize
- Train
- Test
- Prepare

Preparing for Implementation

End of Part 2

Thank you!

For more information, visit

www.hitechsoftware.com

centershift



RentPlus

Self Storage Management Software