

Leasing Wireframes (includes Melissa Data UX) v.11

WEBCHAMP 2 Application

Tue Mar 03 2015





Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Select Space to Lease

A The space originally reserved is not available:

Size	Features	Monthly Rent	Promotion
N' x N' Mini	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM \$N,NNN.NN Web 50% Off Every Month

B We have these spaces available instead:

Size	Features	Regularly C	You Pay	Promotion
<input type="radio"/> N' x N' Mini	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM \$N,NNN.NN Web	First Month Free
<input checked="" type="radio"/> N' x N' Mini	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM \$N,NNN.NN Web	50% Off Every Month
<input type="radio"/> N' x N' x N' Mini	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM \$N,NNN.NN Web	First Month Free

Back to Dashboard

Cancel Lease

Confirm Change

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria
When an overbooking situation exists and a substitution is needed, the PM can find a replacement via this page. Should there be multiple unavailable spaces the spaces and replacement areas would be stacked. Each space has its own list of substitute space options.

A UNAVAILABLE SPACES
This is the unavailable space that the customer reserved.

B AVAILABLE SPACES
These are the alternative spaces available with the similar (or better) size and features to what was initially reserved. The PM can select one space to proceed.

C REGULARLY/YOU PAY COLUMNS
The "Regularly" column will contain the current monthly rent for the product type (ProductSitePrice) while the "You Pay" column will contain the lesser of the monthly rent for the originally reserved product type OR the current monthly rent of the substitute product.



LEASING

A Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Select Space to Lease

This promo is not guaranteed pending customer confirmation.

Move-In Date: Sat 05/13/2014

*Space is eligible for future move in

Size	Space	Features	Monthly Rent	Move in Cost	Promotion	
<input checked="" type="checkbox"/> N' x N' x N' Mini	NNNN Re-Assign	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM Cylinder Floor #2	\$N,NNN.NN Web	50% Off Every Month

E Information Pending Customer Verification

B Back to Dashboard **C** Add Another Space **D** Cancel Lease **Confirm with Customer**

Notes				+ Add Note
Date	Time	Notes	Employee	
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.	

Script **Customer Screen**

Smile and say hello.

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E Verification Indicator Once the PM clicks Confirm with Customer, an indicator will show while the PM waits for the customer to confirm the information on the CFS. This applies to all screens in the leasing workflow with a confirm with customer step. In the event that the PM starts to edit the page, the "Information Pending Customer Verification" message will go away. To send the updated information to the CFS again, the PM will click "Confirm with Customer" after the edit(s) are made.

ANNOTATIONS

Acceptance Criteria

- Selected/assigned spaces show.
- Spaces are unchecked on page load.
- Space details and reserved or default promo show.
- At least one space must be checked to move forward in leasing.
- Unchecked space(s) won't be sent to the CFS for verification and won't be included in the leasing process.
- Any associated reservation notes show in Notes.
- If a space isn't assigned or the selected/assigned space is no longer available, 'Assign Space' button appears instead of Space number. If a space number is already assigned, a "re-assign" button will show to allow the PM to change the space number if desired.
- A modal showing available spaces for selection is displayed when 'Assign Space' or "Re-assign" are selected (see next page).
- Promotion is not selectable.
- Merchandise can be added at any time during the Leasing process.

Screen Elements

- A Process Step Indicator** identifies which part of Leasing the PM is on. This is non-clickable.
- B Back to Dashboard Button** This button saves any information entered on the lease (including any merchandise in the cart) and returns the PM to the dashboard, where the lease will show as an In Progress transaction. Note: prior to the customer look-up, the transaction in progress will not contain the name of the customer if the initiation of the lease was from a walk-in (from a reservation or customer account dashboard, we will already have the customer's name)
- C Add Another Space Button** allows PM to search for and select an additional space (see modal on page 4).
- D Cancel Lease Button** requires the PM to select a reason for the cancellation. If there is an underlying hold or an associated reservation, the hold or reservation is also cancelled with the rental.

LEASING

Assign Space

5' x 10' Standard Storage

Upstairs	Elevator	Non PTM
No Clim.	Inside	
Swing	No Drive Up	
Standard		

Space

A

<input type="radio"/> A101	<input type="radio"/> C203	<input type="radio"/> D124	<input type="radio"/> E133	<input type="radio"/> F124
<input type="radio"/> A234	<input type="radio"/> C204	<input type="radio"/> D126	<input type="radio"/> E126	<input type="radio"/> F126
<input type="radio"/> C239	<input type="radio"/> C205	<input type="radio"/> D128	<input type="radio"/> E128	<input type="radio"/> F128
<input type="radio"/> C108	<input type="radio"/> C206	<input type="radio"/> D129	<input type="radio"/> E129	<input type="radio"/> F129
<input type="radio"/> C109	<input type="radio"/> D115	<input type="radio"/> D130	<input type="radio"/> E130	<input type="radio"/> F130
<input type="radio"/> C111	<input type="radio"/> D119	<input type="radio"/> D132	<input type="radio"/> E132	<input type="radio"/> F132
<input type="radio"/> C113	<input type="radio"/> D120	<input type="radio"/> E108	<input type="radio"/> E333	<input type="radio"/> G108
<input type="radio"/> C115	<input type="radio"/> D120	<input type="radio"/> E109	<input type="radio"/> E334	<input type="radio"/> G109
<input type="radio"/> C117	<input type="radio"/> C122	<input type="radio"/> E110	<input type="radio"/> E335	<input type="radio"/> G201

Cancel

Assign Selected Space #

ANNOTATIONS:

A SPACE SELECTION

If available, PM selects a radio button and selects a space. if more than 5 spaces are available a new row is created - table will be across, not down.

50 results to display without scrolling. If there are more than 50 results, then scroll bar appears.

Add Space

Standard Storage

Vehicle Storage

Select Space Size Use Size Calculator

- 5' x 5' 25 Sq. Ft.  ?
- 5' x 10' 50 Sq. Ft.  ?
- 5' x 15' 75 Sq. Ft.  ?
- 10' x 10' 100 Sq. Ft.  ?
- 10' x 20' 200 Sq. Ft.  ?
- 10' x 25' 250 Sq. Ft.  ?
- 10' x 30' 300 Sq. Ft.  ?
- Locker  ?
- Wine Room  ?
- Music Room  ?
- Mailbox  ?

Search

3 Spaces Available

Size	Space	Features	Monthly Rent	Move in Cost	Promotion
<input type="checkbox"/> N' x N' x N' Mini	NNNN	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM Cylinder Floor #2	\$N,NNN.NN Property 50% Off Every Month
<input checked="" type="checkbox"/> N' x N' x N' Mini	NNNN	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM Cylinder Floor #2	\$N,NNN.NN Property 50% Off Every Month
<input type="checkbox"/> N' x N' x N' Mini	NNNN	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM Cylinder Floor #2	\$N,NNN.NN Property 50% Off Every Month

● Not Rent Ready / Maintenance Needed
L Indicates Locker

ANNOTATIONS

The PM can add spaces via this modal. Space sizes reflect only what current location has available - if a size isn't currently available, it will not appear.

A ADD SPACE
Adds this space to the lease. This modal is dynamic based on current space and feature availability.

Cancel

Add Space

A

Property #

Address, Property Phone Number

Jenny Brown

LEASING

Confirm Space > Contact Info > Lease Agreement > Payment Add Merchandise

Select Spaces to Lease

Move-In Date: Wed 05/10/2014

*Space is eligible for future move in

Size	Space	Features	Monthly Rent	Move in Cost	Promotion	
<input checked="" type="checkbox"/> N' x N' x N' Mini	NNNN Re-Assign C	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM Cylinder Floor #2	\$N,NNN.NN Web	50% Off Every Month
<input checked="" type="checkbox"/> N' x N' x N' Mini	Assign C	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up	Non PTM	\$N,NNN.NN Web	50% Off Every Month

Back to Dashboard
Add Another Space
Cancel Lease
Confirm with Customer

Notes + Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Select a date ✕

May 2014

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Script
Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria Move-in

- Calendar has non-selectable dates grayed out.
- When a date is selected, the calendar closes and the date appears beside the calendar icon.
- If the PM clicks on the calendar icon or selected date, the calendar opens up and the date can be changed.
- Move-In dates must be the same for all spaces being leased.
- If FMI window = 0, the calendar and FMI messaging do not appear.
- If multiple spaces are on the screen, any FMI date will apply to all spaces selected on that page.
- Note: The Confirm with Customer button is available if the CFS is up and connected and the customer is present (i.e. it is not an "offline" lease being entered) and save and continue is present when CFS (or customer) is not available.

A Screen Elements

- Calendar with selectable dates

B Format of Selected Date

- Calendar closes on date selection.
- Calendar Icon and date Format:
Sat 05/13/2014
- If calendar icon or date are clicked, calendar reappears.

C On click, the assign and the reassign button will launch a modal window to select a specific space.


Property #, Property Name, Property Address, Property Phone Number

1
Space Information

2
Contact Information

3
Lease Details

4
Terms & Conditions

5
Authorization

6
Payments

Move-In: MM/DD/YYYY

Space	Features	Monthly Rent
B233 5' x 10' Storage Space	Upstairs No Clim. Swing Standard	Elevator Inside No Drive Up
C155 5' x 10' Storage Space	Upstairs No Clim. Swing Standard	Non PTM Cylinder Floor #2

Confirm

ANNOTATIONS

- Acceptance Criteria**
- Space information appears on the screen for the customer to approve.
 - If the customer wants to change their move-in date (and FMI is available), the PM would update the date on the PM screen, and click Confirm with Customer to send the updated information to the CFS for confirmation by the customer.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

A Individual Lease Business Lease

Name: First M.I. Last

B Identification: Driver's License State Number Scan ID

Address: Street 1 Street 2

Int'l

C City State Zip Code

Phone: Mobile Text OK

Email: Email Address

No Email

On Active Military Duty?: Yes No

Tax Exempt?: Yes No

Back to Dashboard

Cancel Lease

Look Up Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

D Other ID Field States:

Passport	000000000
Military	000000000

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

- **Acceptance Criteria**
- When a lease is created from a reservation, any customer information associated with the reservation should pre-populate.
- After entering the customer's info, PM must click on Look Up Customer to see if the customer is already in the PS system to continue.

- A** **Lease Type Toggle**
- Should the user select Business Lease, the fields will update to the business lease contact fields (page 9)

- B** **ID Fields**
- ID Fields change depending on type of ID (e.g. Military and Passport do not have a state and can't be scanned).
- Dropdown defaults to Driver's License
- A Scan button only appears for Driver's license and if the state selected has IDs that have a magnetic strip that can be read by the scanner.
- Military ID is required for a Military Lease. However, the Military ID can be provided at the point of collecting the military information on a later step of the workflow.

- C** **Customer Name & Contact Info**
- Middle Initial and Street 2 are optional fields.
- Multiple Emails and Phone numbers can be entered. A minimum of one phone number and one email (unless the "no Email" box is checked) must be provided to move on to the next step.
- Mobile Phone Types have Text OK checkbox (default unchecked).
- Business/Office phone has Extension field which is optional (example on next wireframe).
- No Email checkbox (default unchecked) disables Email Field and removes the +Add option.

- D** **Other ID Field States**
- Additional ID options include Passport and Military.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

Individual Lease Business Lease

Name: First M.I. Last

Identification: Driver's License State Number Scan ID ?

Address: 12345 Smith St. Street 2

Int'l ?

Montreal QC QC H2Y 1S5

Canada

Phone: Mobile Text OK Preferred + Add

Work ext Preferred - Remove + Add

Email: bbb@ccc.com

Email Address Preferred - Remove + Add

On Active Military Duty?: Yes No

Tax Exempt?: Yes No

Back to Dashboard

Cancel Lease

Look Up Customer

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

International Address

If PM checks International Address:

- Email address becomes required (No Email checkbox disappears)
- Only a two- digit territory/provence code will be allowed to be typed in rather than the whole name of a provence such as Quebec (DB restriction)
- Zip Code changes to Postal Code and allows letters and numbers.
- Only U.S. phone numbers are allowed.
- Country dropdown appears defaulted to Select Country, prompting selection.
- Territory/province field is optional as not all countries use this.

Multiple Phone Numbers & Emails

- PM can click +Add beside the Phone or Email to create an additional entry row.
- Preferred radio buttons appear when multiple email address or phone numbers are entered.
- If multiple email addresses are entered, then the PM must set one as the Preferred.
- If multiple phone numbers are entered, then the PM must set one as the Preferred.
- Preferred buttons go away if there is only one phone number or email.
- The remove option appears when more than one email or phone number is entered. However, once there is only one email or one phone number left, the remove button will disappear again.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

Individual Lease Business Lease

Buisness Name:

Contact:

Identification:

Can this contact legally rent on behalf of the company?: Yes No

Address:

Int'l ?

Phone: Text OK [+ Add](#)

Email: [+ Add](#)

No Email

Tax Exempt?: Yes No

Tax Exempt Number: [Scan](#)

Back to Dashboard

Cancel Lease

Look Up Customer

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- For Business Leases, the Contact Person is the person executing the lease.
- Legal U.S. non-Military ID (license, passport, state ID) can be used.
- Department field is optional.
- Scanning of ID is not allowed on a business lease.

Ps Public Storage
Property #, Property Name, Property Address, Property Phone Number

Jenny Brown

LEASING

Confirm Space

Customer Information

Identifications

Name

Address

Phone

Email

Notes

Date	Time
11/8/13	11:00

Choose an account that matches or create a new customer/account

<p>Customer:</p> <p>Geetha M. Vivekaandamorthy Drivers License: CA A123456789</p> <p>Customer Type: Residential Lease</p>	<p>Account: 12345456</p> <p>12345 Smith St., Apt. 4B Los Angeles, CA 90001 Mobile: 323-221-2207 greatperson@yahoo.com</p>	<p>Property Number: 12345</p> <p>Space: B103, A5005</p>	<div style="background-color: #555; color: white; padding: 10px 20px; border-radius: 5px;">Use This Account</div>
<p>Customer:</p> <p>Happy People LLC. Geetha M. Vivekaandamorthy Drivers License: CA A123456789</p> <p>Customer Type: Business Lease</p>	<p>Account: 78922213</p> <p>781 Archer St. Los Angeles, CA 90210 Mobile: 323-221-2207 greatperson@yahoo.com</p>	<p>Property Number: 12345</p> <p>Space: A209</p>	<div style="background-color: #555; color: white; padding: 10px 20px; border-radius: 5px;">Use This Account</div>
<div style="background-color: #555; color: white; padding: 10px 20px; border-radius: 5px;">Create New Account</div>			
			<div style="background-color: #555; color: white; padding: 10px 20px; border-radius: 5px;">Create New Account</div>
<div style="background-color: #ccc; padding: 10px 20px; border-radius: 5px; display: inline-block;">Cancel</div>		<div style="background-color: #555; color: white; padding: 10px 20px; border-radius: 5px; display: inline-block;">Create New Customer</div>	

ANNOTATIONS

- **Acceptance Criteria**
- If Create New Customer is selected, the system will create a new customer record and a new account under that customer for this lease.
- When Customer Look up is clicked, the system serves up possible customer/account matches based on the customer information entered.
- No selection is defaulted so the PM must select one.
- Selecting an existing customer and choosing Create New Account creates a new account under the selected customer.
- If PM selects Use this Account, the space(s) being rented are added to the selected account.
- Clicking Cancel will take the PM back to the Customer Information screen where they can edit information, reattempt customer look up or hit Cancel Lease.
- If an existing account is selected and used, no edits are allowed - fields are overwritten and become non editable.

- **If an account not matching the lease type is selected:**
 - Error message (copy TBD) informs PM they have selected an Account (business or residential) not matching the Lease Type. Account Type must match Lease Type.

Scale: 1440 x 900. Not to actual scale.

Public Property # Property Name Property Address Property Phone Number Jenny Brown

Geetha M. Vivekaandamorthy

Past Due Balance: \$20.00 ?

This amount can be added to the the payment process at the end of the lease creation. Payment Type restrictions apply.

Pay Past Due Balance at Checkout
 Hold Lease and Pay Past Due Now
 Do Not Pay at This Time

Continue

Geetha M. Vivekaandamorthy

Past Due Balance: \$45.00 ?

This amount must be paid for the customer to be eligible for the promotion with this new rental. Payment Type restrictions apply.

Pay Past Due Balance at Checkout
 Hold Lease and Pay Past Due Amount Balance Now
 Don't Pay at This Time (No promotion will be available)

Continue

Geetha M. Vivekaandamorthy

Past Due Balance: \$8,276.52 ?

This amount must be paid for the customer to be able to rent this space. Payment Type restrictions apply.

Pay Past Due Balance at Checkout
 Hold Lease and Pay Past Due Amount Balance Now
 Cancel Lease

Continue

Geetha M. Vivekaandamorthy

Past Due Balance: \$8,276.52 ?

This amount must be paid for the customer to be able to rent this space. Payment Type restrictions apply.

Pay Past Due Balance at Checkout
 Hold Lease and Pay Past Due Amount Balance Now
 Cancel Lease

Cancellation Reason: Choose One... ▼

Employee ID

Continue

ANNOTATIONS

When an existing customer attempting to rent a new space owes Public Storage from a previous or current rental.

Acceptance Criteria

- Pay Past Due Balance at Checkout option adds the past due amount at checkout.
- Hold Lease and Pay Past Due Amount Balance option puts the lease on hold and takes PM to the customer's account dashboard to address the outstanding balance.

A Small Amount

- As per requirements, this customer does not have to pay past due to rent a new space and receive a promotion.
- Customer can choose to not pay or to have the amount added to the total during the payment step.
- Don't Pay at This Time option will continue leasing without adding the past due amount at the end.

B Medium Amount

- As per requirements, this customer can rent a space, but is not eligible for a promotion without paying past due.
- Don't Pay at This Time option will continue leasing without adding the past due amount, but the customer, as per requirements, won't receive any promotion with the rental.

C Large Amount

- Customer cannot rent a space without paying this past due amount. Once paid, customer is eligible for any promotions available.
- Cancel Lease option cancels the lease and ends the process.

Scale: 1440 x 900. Not to actual scale.

Public
Property # Property Name Property Address Property Phone Number
Jenny Brown

Geetha M. Vivekaandamorthy

Past Due Balance on Acct 123456: \$15.00

This amount is on another account belonging to this customer. It cannot be paid during this lease's checkout process. Payment Type restrictions apply.

Hold Lease and Pay Past Due Amount Balance Now
 Do Not Pay at This Time

Continue

Geetha M. Vivekaandamorthy

Past Due Balance on Acct 123457: \$45.00

This amount must be paid in advance for the customer to be eligible for the promotion with this new rental. Payment Type restrictions apply.

Hold Lease and Pay Past Due Amount Balance Now
 Don't Pay at This Time (No promotion will be available)

Continue

Geetha M. Vivekaandamorthy

Past Due Balance on Acct 123458: \$876.52

This amount must be paid in advance for the customer to be able to rent this space. Payment Type restrictions apply.

Hold Lease and Pay Past Due Amount Balance Now
 Cancel Lease

Geetha M. Vivekaandamorthy

Past Due Balance on Acct 123459: \$876.52

This amount must be paid in advance for the customer to be able to rent this space. Payment Type restrictions apply.

Hold Lease and Pay Past Due Amount Balance Now
 Cancel Lease

Cancellation Reason:

Employee ID:

Continue

ANNOTATIONS

If a balance is owed by customer on a different account than the one being used to create this lease, then the previous balance cannot be added to the total during checkout of this new lease.

Acceptance Criteria

- The PM will be informed of balance due and given options based on the amount owed limitations.
- Modal information and options differ based on the business requirements. See previous wireframe or requirements for various limitations depending on amount owed.
- Help text explains the criteria including any payment method limitations and payment requirements for the previous balances.

A Low Balance Owed Modal

B Medium Balance Owed Modal

C High Balance Owed Modal

D Cancel Lease modal.

- When the PM selects the Cancel Lease radio button, the Cancellation Reason dropdown and Employee ID field are made accessible. This cancels the lease as well as any underlying hold or reservation.

Scale: 1440 x 900. Not to actual scale.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

A Existing Account XXXXXX Selected ✓

B

Name: Geetha M. Vivekaandamorthy

Identification: Driver's License CA A123456789

Address: 12345 Smith St.
Los Angeles CA 90001

Phone: Home 323-972-1000

Email: user@company.com

On Active Duty Military

Tax Exempt ID: xxxxxxx

Back to Dashboard

Edit Customer Info

Cancel Lease

Confirm with Customer

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

- **Acceptance Criteria**
- If an existing account is selected:
 - A notification appears at the top of the screen.
 - The customer information cannot be updated here. It can be updated through Customer Account Dashboard if needed with the lease put on hold.
- If it is an existing account, Edit Customer Info and Confirm with Customer buttons replace the Customer Look Up button. If it is a new account, the Customer Look Up button becomes "Verify Customer Info".

Screen Elements

- A** Existing Account Notification
- B** Fixed, not-editable customer information fields (for existing accounts selected only). Remains editable for New Customers.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

New Account XXXXXX Created

Name: Geetha M Vivekaandamorthy

Identification: Driver's License State Number

Scan ID ?

Address: 12345 Smith St. 805

Int'l ?

Los Angeles CA 90001

! Address entered does not match. Choose preferred address:

Input: 12345 Smith Street #805 Los Angeles, CA 90000

Suggested: 12345 Smith Street Unit 805 Los Angeles, CA 90000

Use Selected Address

Phone: Mobile Text OK + Add

Email: Email Address + Add

No Email

Back to Dashboard

Cancel Lease

Verify Customer Info

A

[Error display text for error code]

- Correct address and re-verify
- Override and use the input address (Customer Verified)

Select

Script

Customer Screen

Smile and say hello.

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Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

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ANNOTATIONS

- Acceptance Criteria
- When Verify Customer Info is clicked, Melissa Data runs against the address and all phone numbers entered.
- Melissa Data lets the PM know if there are issues with either the address or phone number as specified in Melissa Data Requirements.
- PM can accept or override Melissa Data recommendations or edit the information manually and re-verify.
- Once Melissa Data process is complete, a message at the top lets the PM know the info is verified (See following wireframe).
- After Verify Customer Info (Melissa Data) is complete, PM will see the Confirm with Customer button which when clicked, will send the information to the CFS to be confirmed by the customer.
- All Melissa Data verified fields turn to green.

If there is an entry issue, the PM would correct the address in the fields on the screen, then hit "Verify Customer Info" again to re-run Melissa Data.

A

If the original entry is correct (as determined by the PM), PM would check "Override and use the input address (Customer Verified)" and click Select. The "Verify Customer Info" button would be replaced with "Confirmed by Customer" and Melissa Data would not be run again against the address. Please refer to global I.A. standard for full Melissa data handling rules.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

ANNOTATIONS

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

New Account XXXXXX Created

Name: Geetha M Vivekaandamorthy

Identification: Driver's License State Number Scan ID ?

Address: 12345 Smith St. 805

Int'l ?

Los Angeles CA 90001

Phone: Mobile 323 221 2207 Text OK + Add

! [Error display text for error code]

- Correct phone # and re-verify info
- Override and use the input phone #

Select

Email: Email Address + Add

No Email

Back to Dashboard

Cancel Lease

Verify Customer Info

Script

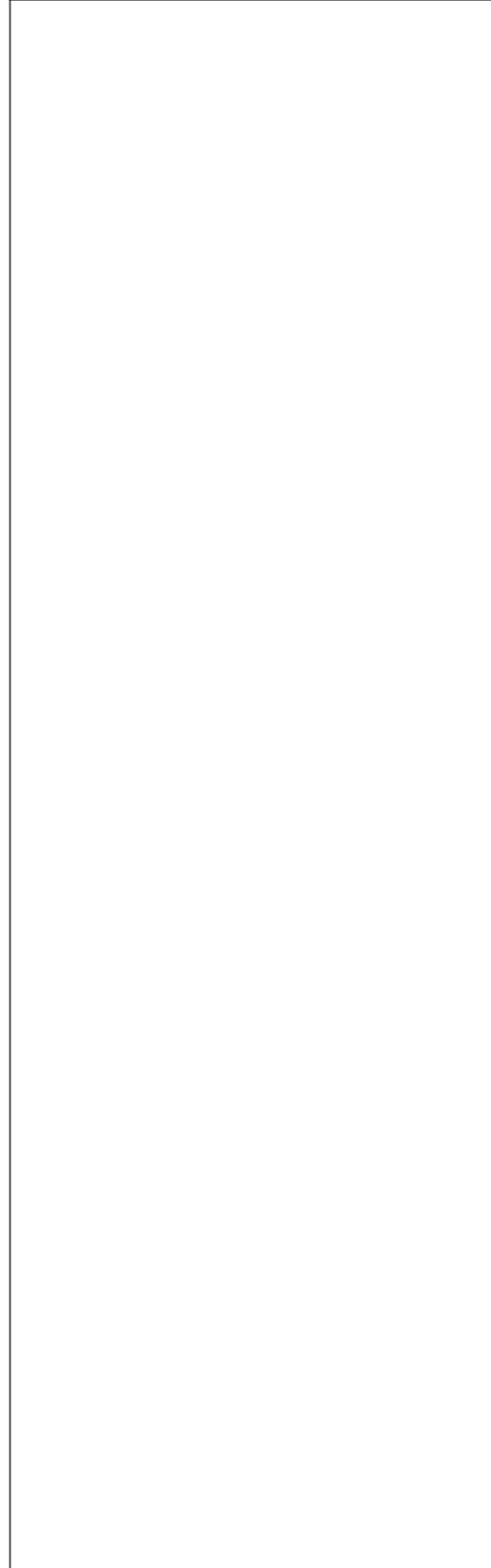
Customer Screen

Smile and say hello.

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Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Customer Information

A Contact Address and Phone Numbers Verified

Name:

Identification:

Address:

Int'l

Phone: Text OK

Email:

No Email

On Active Military Duty?: Yes No

Tax Exempt?: Yes No

Back to Dashboard

Cancel Lease

Confirm with Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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ANNOTATIONS

Acceptance Criteria

- When Melissa Data is complete, a message appears at the top of the screen.
- If any of the verified info is edited the verify Customer Info button reappears and the Confirm with Customer button does not show until re-verification is complete.
- Only fields changed will revert to the non-verified state.

A MESSAGING AREA

This is a messaging area, the account number is not carried through on every screen. Appropriate messaging, like verification appears here during the leasing process. Define standard for messaging text. (TBD)


Property #, Property Name, Property Address, Property Phone Number

✓

2

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Space Information
Contact Information
Lease Details
Terms & Conditions
Authorization
Payments

Geetha M. Vivekaandamorthy

Driver's License (CA) A123456789

12345 Smith St. Apt. 805

Los Angeles, CA 90001

(323) 221-2207
Mobile | Preferred | Text OK

(310) 555-1222
Home

(310) 555-1222 Ext. 223
Work

jjl@jessiesawesomesite.com
Preferred

funny@emailland.edu

Tax Exempt Number - 123456678

Confirm

ANNOTATIONS

Acceptance Criteria

- Customer's (or Business') contact information appears on the screen for the customer to approve.
- If the customer has changes, he asks the PM to correct the Information
 - PM corrects any information on their screen, then re-verifies the changes (if it is to address or phone number).
 - Once changes are verified, the PM will click "Confirm with Customer" and the CFS will refresh for confirmation.
- When the customer clicks Confirm, the CFS is put on hold until the next confirmation step is available.
- "Preferred" only appears beside phone numbers or emails if multiple are entered.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Emergency Contacts

Emergency Contact - B233

Use Existing Contact: New Emergency Contact

Name: Cindy M.I. Watts

Relationship: Select

Address: 12345 Smith St. Street 2

Los Angeles CA 90001

Phone: Mobile 323 221 2207

Email: hew@email.com

Authorized Access: B233

Customer declines to provide Emergency Contact

Back to Dashboard

Cancel Lease

Verify Emergency Info

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- Emergency Contacts selected from an existing account will be pre-populated and not editable.
- "Text OK" is **not** an option for Emergency or Authorized Access mobile phones.
- Only one Emergency Contact can be entered per space.
- If an Emergency Contact has "Authorized Access User" checked, that Emergency Contact is allowed authorized access of the space.
- PM can check "Customer declines to provide emergency contact." if the customer so declines.
- Verify Emergency Info button is replaced by Confirm with Customer once verification is complete.
- If a customer declines to provide an emergency contact, it is not shown on the CFS and Confirm with Customer will read Save and Continue.
- Melissa Data verification is run on the Emergency Contact as per the requirements. This follows Melissa Data steps as previously indicated.
- Use Existing Contact dropdown is conditional - it only appears if 1) the customer is an existing customer and 2) there is at least one existing emergency contact on the account already



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Emergency Contacts

Emergency Contact - B233, C244, D155

Use Different Emergency Contacts Per Space ?

Use Existing Contact: New Emergency Contact ▼

Name:

Relationship: Select ▼

Address:

▼

Phone:

Email:

Authorized Access: B233 C244 D155

Customer declines to provide Emergency Contact

Back to Dashboard

Cancel Lease

Verify Emergency Info

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- On page load, only one Emergency Contact section will show, covering all spaces being leased.
- If the customer is renting multiple spaces and the customer wishes to have different emergency contacts for each space, the PM can check "Use Different Emergency Contacts" box, allowing entry of different emergency access contacts by space.
 - If checked, an Emergency Contact section per space opens, pushing the page down.
 - The Emergency Contact at the top becomes the Emergency Contact only for the first space.
 - If unchecked after being checked, the additional space Emergency Contact sections close back up and only the top one (with any entered information remaining in it) is left on the screen. The help text for this question will state that any information perviously entered will be lost by unchecking Use Different Emergency Contacts Per Space.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Emergency Contacts

Emergency Contact - B233

Use Different Emergency Contacts Per Space ?

Use Existing Contact: New Emergency Contact

Name: Cindy M.I. Watts

Relationship: Select

Address: 12345 Smith St. Street 2

Los Angeles CA 90001

Phone: Mobile 323 221 2207

Email: hew@email.com

Authorized Access: B233 C244

Customer declines to provide Emergency Contact

C244 Emergency Contact

Use Existing Contact: New Emergency Contact

Name: John E Smith

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- When "Use Different Emergency..." is clicked, each space gets its own section and the title of each section specifies the space.
- When verifying Emergency Contact information, Melissa Data will run on applicable fields for all emergency contacts.
- Customer can decline to provide an Emergency Contact for any of the spaces.

Scale: 1440 x 900. Not to actual scale.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Emergency Contacts

Emergency Contact - B233

Use Different Emergency Contacts Per Space ?

Customer declines to provide Emergency Contact

C244 Emergency Contact

Name:

Relationship:

Address:

Phone:

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- When a customer declines to provide an emergency contact, the information area hides.



Property #, Property Name, Property Address, Property Phone Number

✓

2

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6

Space Information

Contact Information

Lease Details

Terms & Conditions

Authorization

Payments

Emergency Contact for A150

Cindy Walker
Sister
 54321 Smith St. Apt. 7
 Los Angeles, CA 00000
 (323) 555-7022
Mobile
 woohoo@whawahwhat.com

Emergency Contact for B233

John E. Smith
Brother
 321 Pico
 Los Angeles, CA 00000
 (323) 123-7098
Mobile
 woohoo2@whawahwhat.com

Confirm

ANNOTATIONS

- Acceptance Criteria**
- Emergency Contact for all spaces are shown one after another.
 - If there is a second line for address, it appears beside the first line for address.
 - Changes can be done via the PM's edit functionality.
 - Emergency and Authorized Access pages only appear if there are people listed in those roles for the space(s) being rented.
 - Scroll bar automatically appears below the step indicator if scrolling is needed.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Authorized Access Contacts

Name:

Phone:

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- If a work number is selected, an optional extension field appears.
- "Text OK" is **not** an option for Authorized Access mobile phones.
- Multiple Authorized Access Contacts can be entered (see requirements for maximum number).
- First Name, Last Name and Phone are required for any Authorized Access Contact entered.
- Authorized Access Contacts are not required.
- If no information is entered, the button is Save and Continue.
- If no contacts are entered, when the PM clicks Save and Continue, nothing goes to the CFS and the PM is taken to the next step of leasing.
- If an authorized contact is provided, then the Save and Continue button will read Confirm with Customer.
- If an emergency contact is also specified as an authorized access user on the previous step, that information (name and phone only) appears on this screen in case the customer requests the authorized access to be removed. However, these contacts are not editable on this screen.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Authorized Access Contacts

Name:

Phone:

Authorize for: B233 C244 D155

Add Authorized User

Back to Dashboard

Cancel Lease

Confirm with Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- If there are multiple spaces being rented at once, each Authorized Access Contact can be assigned by the checkboxes to any selection of the spaces.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Authorized Access Contacts

Name:

Phone:

Authorize for: B233 C244 D155

Name:

Phone:

Authorize for: B233 C244 D155

Add Authorized User

Back to Dashboard

Cancel Lease

Confirm with Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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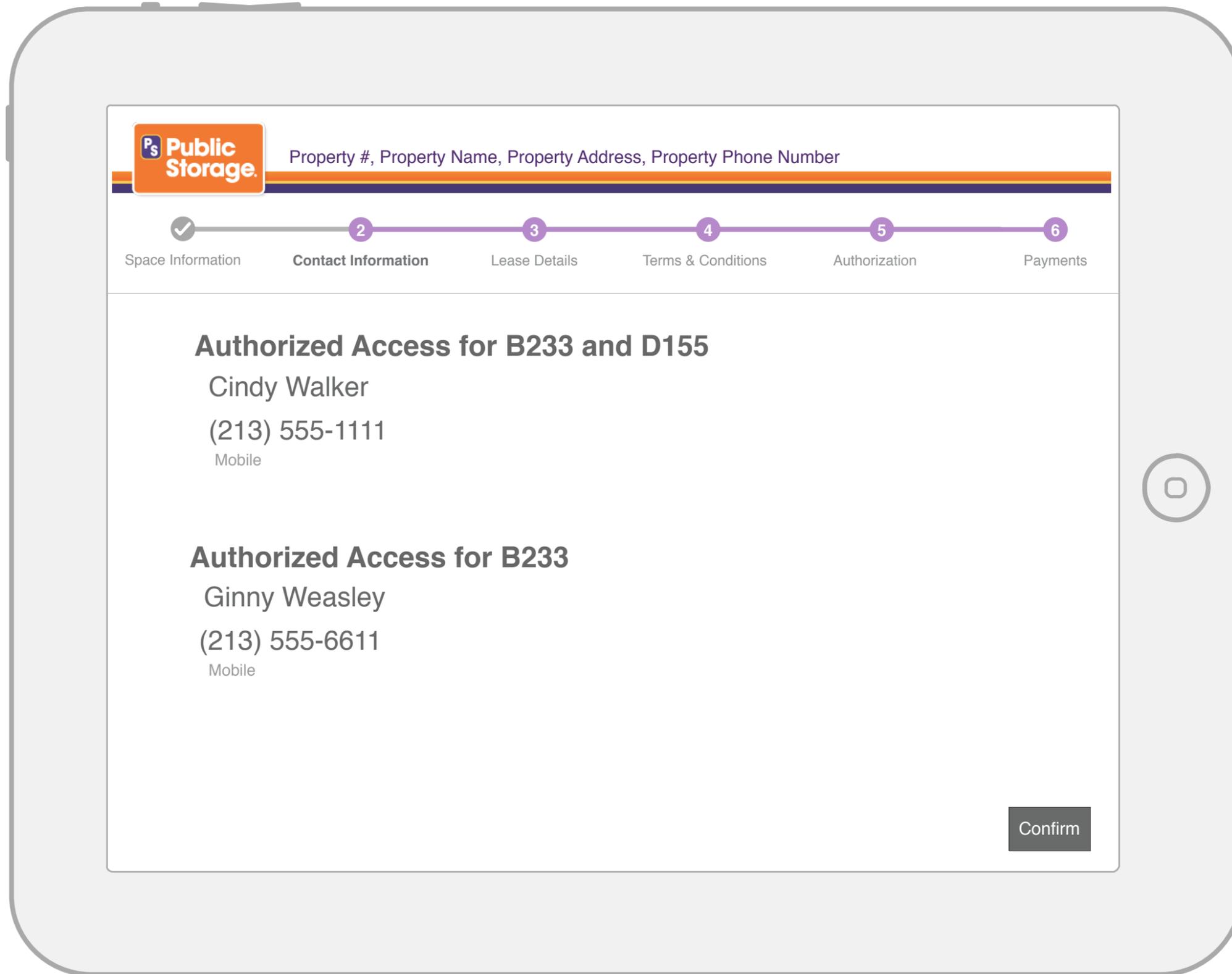
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ANNOTATIONS

Acceptance Criteria

- When the PM adds an additional Authorized Access via "+ Add Authorized User" button, a Remove Button appears beside Authorized Access Contact filled and empty fields on the screen.
- If there are multiple spaces being leased, each Authorized Access Contact has checkboxes for each of the spaces.
- If there's only one space being rented, the "Authorize for" checkboxes don't appear.



ANNOTATIONS

- Acceptance Criteria**
- Customer can confirm the Authorized Access Contact for a space.
 - Customer can request the PM edit or remove that contact if desired.
 - This screen only appears when the customer has specified Authorized Access contact(s) for a space.
 - All authorized access users are confirmed on this screen (with scroll bar if necessary). After the customer confirms, the CFS will show the screen saver until the next confirmation step.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment Add Merchandise

Eligible Promotions A ! Original promo no longer available

B233 (5' X 5' x 4')

B

None

C

Monthly Rent	Move-In Cost
\$N,NNN.NN	\$N,NNN.NN
- \$N,NNN.NN	\$N,NNN.NN
Sub Total	\$N,NNN.NN

Back to Dashboard

Cancel Lease

Save and Continue D

Notes + Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- A Conditional text appears if the original promotion is no longer available or an existing customer is not eligible to use a promotion.
- B Promotional dropdown menu persistently lists all available promotions with option to select None for no promotion unless there are not any promotion available.
- C When promotion is selected from the pulldown menu, the cost table changes to display the cost difference when the promotional value is applied.
- D Selecting the Save & Continue button, takes the user to the next step of the leasing process.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



ANNOTATIONS

LEASING

Confirm Space > **Contact Information** > Lease Details > Lease Agreement > Payment

Add Merchandise

Eligible Promotions ?

! Original promo no longer eligible

A233 (5' X 5' x 4')

None ▼

Monthly Rent	Move-In Cost
\$N,NNN.NN	\$N,NNN.NN
- \$N,NNN.NN	\$N,NNN.NN
Sub Total	\$N,NNN.NN

B155 (10' x 10')

50% off 1st Month Special - New ▼

Monthly Rent	Move-In Cost
\$N,NNN.NN	\$N,NNN.NN
- \$N,NNN.NN	\$N,NNN.NN
Sub Total	\$N,NNN.NN

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > **Lease Details** > Lease Agreement > Payment

Add Merchandise

Lease Questionnaire

B233 (5' X 5' x 4')

Storage Contents:

Select Type of Contents



Add Insurance?:

Yes

No



Is there a Lien on the Contents?:

Yes

No



Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- On page load, none of the items are defaulted to Yes or No. The PM must make a selection for each.
- The exception is if the space is parking only. Storage contents default to Vehicle/Vessel and Add Insurance defaults to No.
- PM can select options on this screen that will determine what additional information will be needed to create the necessary lease addendums.
- Lien on Contents question only shows if required by the state that this lease is for. Even if required for the state, if ONLY a vehicle/vessel is being stored, this will default to no.
- Unless Storage Contents is Vehicle/Vessel Only (and insurance defaults to No), the button will read "Confirm with Customer" as the PM will need the customer to confirm either insurance acceptance or declining insurance on the CFS.
- If further information is needed for the lease (for example military information or vehicle information), once the customer accepts/declines the insurance (or the Save and Continue button is pressed if applicable), the screen will advance to the appropriate next step in the workflow. If no further information is needed, the screen will advance to the Lease Agreement step.

Storage Contents Dropdown as Per the Requirements

- Default state is Select Type of Contents
- Household Goods
- Household Goods and Vehicle/Vessel
- Vehicle/Vessel
- Business Goods



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > **Lease Details** > Lease Agreement > Payment

Add Merchandise

Lease Questionnaire

B233 (5' X 5' x 4')

Storage Contents: ?

Add Insurance?: Yes No ?

Coverage:

Is there a Lien on the Contents?: Yes No ?

Back to Dashboard

Cancel Lease

Confirm with Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Add Insurance Acceptance Criteria

- If Add Insurance is selected Yes, a dropdown appears allowing the PM to select the coverage amount.
- Dropdown options should come from the database. Default is "Select".
- If Storage Contents for the space is "Vehicle/Vessel," Insurance defaults to no. Note, if "Household Goods & Vehicle/Vessel" is selected, insurance may be added because the Household Goods are coverable.
- if for any reason, insurance offerings are disabled at a property, the Insurance Yes/No radio buttons are replaced by a message stating "Insurance is not available at this time."



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Lease Questionnaire

B233 (5' X 5' x 4')

Storage Contents:

Vehicle/Vessel



Select Vehicle/Vessel Type

Add Insurance?:



Yes



No



Is there a Lien on the Contents?:



Yes



No



Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- If Vehicle/Vessel or Household Goods and Vehicle/Vessel is selected, the Select Vehicle/Vessel Type dropdown Appears. The dropdown contains:
 - Select Vehicle/Vessel Type (Default)
 - Motorized Vehicle
 - Non-Motorized Vehicle
 - Motorized Boat/Sea Vessel
 - Non-Motorized Boat/Sea Vessel
- If Type selected is Non-Motorized Boat/Sea Vessel, no further information is needed and the vehicle information screen will not be shown.
- Requirements specify what additional information is required depending on the selection in Storage Contents.
- **If Rental Space is a Boat Slip or an covered or uncovered parking space:**
 - Storage Contents is defaulted to Vehicle/Vessel
 - Vehicle/Vessel Type dropdown needs to be selected by the PM.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Lease Questionnaire

B233 (5' X 5' x 4')

Storage Contents: Select Type of Contents

Add Insurance?: Yes No

Coverage: \$14.00 (\$3,000 coverage)

Is there a Lien on the Contents?: Yes No

Lienholder: Enter Lienholder Name

Remove A

Description of Goods: Enter Description of Goods on Lien

Lienholder: Enter Lienholder Name

Remove A

Description of Goods: Enter Description of Goods on Lien

Add Lienholder

Back to Dashboard

Cancel Lease

Confirm with Customer

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

- Loan on Contents Section Acceptance Criteria**
 - Shows only if required, based on state laws.
 - If Yes, Lienholder and Description of Goods text boxes appear.
 - If different Lienholders cover different goods being stored, additional sets of the fields can be added via the "+Add Lienholder" button which adds an additional set of Lienholder and Description of Goods fields.
 - A Remove button will appear to the right of any Lienholder/Description sections once there is more than one.
 - If contents option Vehicle/Vessel is selected, the Lien on Contents question will not display because that info will be collected on the parking addendum. If Household Goods and Vehicle/Vessel is selected, the field will remain available as items other than the car may be under lien.
- "Remove" buttons should be displayed for each added Lienholder except when their is only one (do not display "Remove" button in this instance)

A

A

A

Scale: 1440 x 900. Not to actual scale.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > **Lease Details** > Lease Agreement > Payment

Add Merchandise

Lease Questionnaire

B233 (5' X 5' x 4')

Storage Contents: ?

Add Insurance?: Yes No ?

Is there a Lien on the Contents?: Yes No ?

A111 (10' x 10')

Storage Contents: ?

Add Insurance?: Yes No ?

Is there a Lien on the Contents?: Yes No ?

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria

- If multiple spaces are being rented at once, each space has its own fields to be filled in.


Property #, Property Name, Property Address, Property Phone Number

✓
Space Information

✓
Contact Information

3
Lease Details

4
Terms & Conditions

5
Authorization

6
Payments

Insurance for C322

I accept terms, coverage and conditions of this insurance policy from the Perfect Solutions Insurance Program (License #0371719).

\$3,000
Insurance Coverage

\$14.00 per Month
Insurance Premium

Terms & Conditions
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

ANNOTATIONS

Acceptance Criteria

- Customer can see the amount of insurance coverage and the monthly fee.
- Insurance can be edited by the PM if the customer requests. Upon save of changes by the PM, the CFS will update with the changed amount or decline of insurance.

Public Storage Property #, Property Name, Property Address, Property Phone Number

Space Information Contact Information **Lease Details** Terms & Conditions Authorization Payments

Insurance for D321

I decline insurance and will provide my own coverage.

Terms & Conditions
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Accept

ANNOTATIONS

- Acceptance Criteria**
- Decline Insurance terms appear for the customer to Accept
 - Insurance can be edited by the PM if the customer requests. Once the PM makes the change, they will click "Confirm with Customer" again to display the new insurance information for the customer to Accept which may affect which screen displays (with coverage or declining coverage).

Longer Statement option:

I **decline** Insurance Coverage from Storage Insurance Program through Willis Insurance Services of California, Inc. (License #0371719).



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Military Information

Customer Military Details

Birth Date: mm / dd / yyyy

Social Security: xxx-xx-0000

Deployment Date: mm / dd / yyyy ?

Military ID: XXXXXXXX

Military Branch: Select Military Branch

Military Unit: Battalion 55830 ?

Commanding Officer

Name: First Last

Rank: Rank

Phone: Select Type

Back to Dashboard

Cancel Lease

Confirm with Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

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ANNOTATIONS

Acceptance Criteria

- If a military ID was not initially provided on contact information, it needs to be added on this screen. If previously provided, it will show here and not be editable.

Military Branch Dropdown:

- Army
- Army Reserve
- Army National Guard
- Air Force
- Air Force Reserve
- Air National Guard
- Coast Guard
- Coast Guard Reserve
- Marine Corps
- Marine Corps Forces Reserve
- Navy
- Navy Reserve

PS **Public Storage**

Property #, Property Name, Property Address, Property Phone Number

✓

✓

3

4

5

6

Space Information

Contact Information

Lease Details

Terms & Conditions

Authorization

Payments

Active Duty Military

I agree that I will immediately notify Public Storage of any change in my duty status.

04/30/1994 <small>Birth Date</small>	xxx-xx-0000 <small>Social Security</small>
08/01/2014 <small>Deployment Date</small>	XXXXXXXXX <small>Military ID</small>
Marine Corp. Forces Reserve <small>Branch</small>	Battalion 55830 <small>Military Unit</small>

Commanding Officer

Anderson Meyhem
Major

(818) 555-1212
Mobile

Confirm

ANNOTATIONS

General Addenda Acceptance Criteria

- PM can edit information when requested for any customer specified information.

Military Information

- Information provided by the customer regarding his military status and his commanding officer appear for the customer to verify and accept.
- Accepted only once for all leases created in a flow.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > **Lease Details** > Lease Agreement > Payment

Add Merchandise

Fiduciary Information

Authorizer's Name:

Authorizer's Title:

Date Signed: Sat 05/11/2014

Print

Scan

Back to Dashboard

Cancel Lease

Confirm with Customer

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Acceptance Criteria

- In the case where the customer is also the "authorizer" then when the PM comes to this screen, the information will be pre-populated. The date signed will default to today's date. The print and scan buttons would not show - there is nothing to print or scan. The Confirm with Customer would show to trigger the CFS Fiduciary Information screen to display so that the customer can confirm.
- If the customer is NOT the "authorizer" this screen would load blank and the print and scan buttons would show. When the customer is not the authorizer, the letter, pre-populated with pertinent info from the Business Contact Info section (such as Contact Name, Business Name, etc.) can be printed. Once printed, the user would put the lease on hold using the "Back to Dashboard" button.
- Once the Letter is brought back by the contact, the PM can restart the lease at this point and enter any missing information (Authorizer's Name, Title and Date) not previously collected, as well as scan a copy of the signed document.
- The button would say "Save and Continue" like is shown on the next page.

A

A

Both the print and scan buttons open the standard OS dialog modal for their respective functions.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information

Select a date > Payment

Add Merchandise

Fiduciary Information

Authorizer's Name: Cindy

Authorizer's Title: Title

Date Signed: Thur 05/11/2014

Select a date

May 2014

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Print Scan

Preview X A

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

A Scanned Document After the doc is scanned, it appears in this location as a Preview link.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment **Add Merchandise**

Fiduciary Information

Authorizer's Name: Cindy

Yes No

Authorizer's Title: Title

Date Signed: Sat 05/11/2014

Print

Scan

Back To Dashboard

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	1:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Document Scan

Scanning this document will replace the existing document. Do you want to continue?

No

Yes

Script

Customer Screen

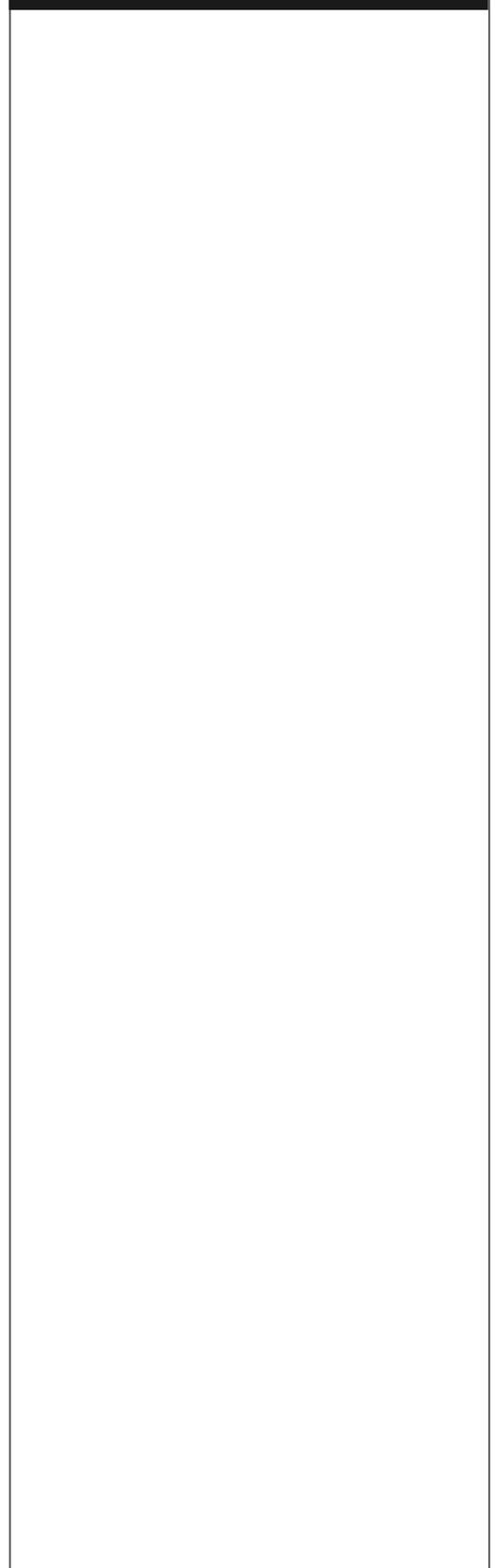
Smile and say hello.

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ANNOTATIONS





Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > **Lease Details** > Lease Agreement > Payment

Add Merchandise

Fiduciary Information

Authorizer's Name:

Yes No

Authorizer's Title:

Date Signed: Sat 05/11/2014



Print

Scan

Back To Dashboard

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	1:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Document Scan

Document is scanning.



Cancel

Script

Customer Screen

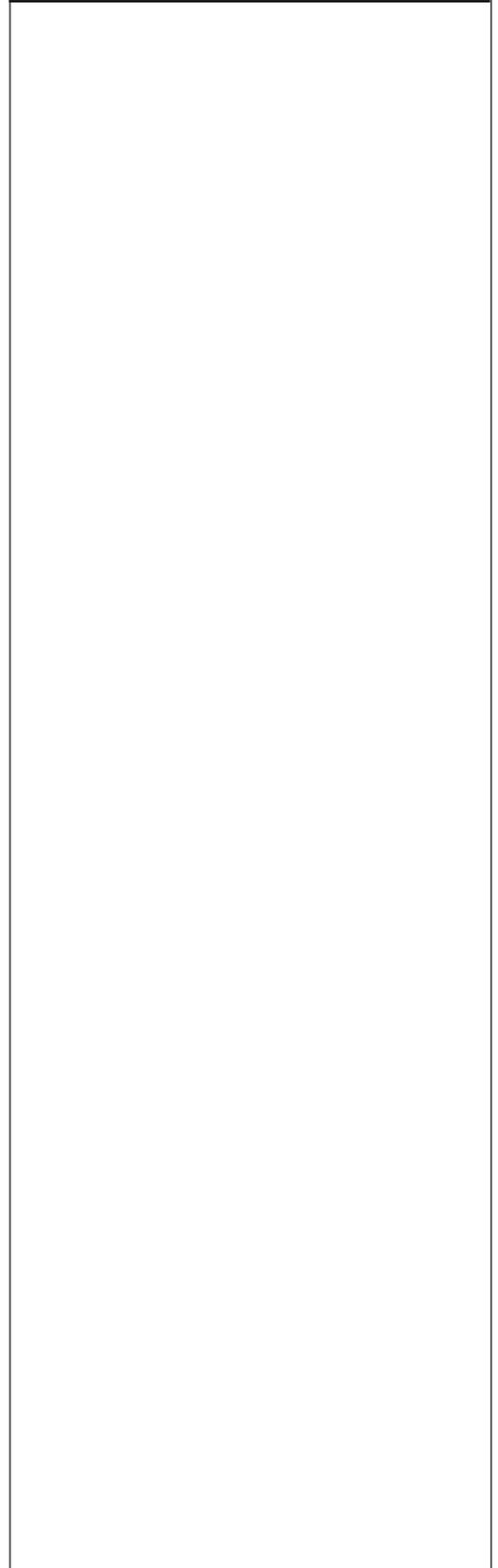
Smile and say hello.

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ANNOTATIONS




Property #, Property Name, Property Address, Property Phone Number

✓

✓

3

4

5

6

Space Information
Contact Information
Lease Details
Terms & Conditions
Authorization
Payments

Fiduciary Agreement

I represent and warrant that I am authorized by the Company to enter into this agreement on its behalf.

Cindy Walker
Authorizer

Founder, Owner, CEO, Lead Patch Designer
Title

Sally's Custom Eye Patches
Company Name

ANNOTATIONS

Acceptance Criteria

If an authorization letter was uploaded, this screen doesn't show.

If the customer is the authorized company person and can rent legally for the business, this screen appears for the customer to confirm that information.



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Vehicle Information

Vehicle - B201

Select Vehicle / Vessel Type [?]

Make: Make

Model: Model

Year: Year Made

Color: Color

VIN/Hull #: VIN / Hull Number

Length: Boat Length [A]

Owner & Lien Information

Registered Owner is Renter: Yes No [?]

Lienholder?: Yes No [?]

Legal Owner: First and Last Name [?][C]

Add Vehicle

Back to Dashboard

Cancel Lease

Save and Continue [B]

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Vehicle Type Dropdown

- Motorized Vehicle
- Non-motorized Vehicle
- Motorized Boat / Sea Vessel
- Non-motorized Boat / Sea Vessel

Help Icon Text beside Vehicle Type Dropdown will explain what the Vehicle Types mean:

- Motorized Vehicles are Car, Truck, Motorcycle, RV, etc.
- Non-motorized Vehicles are Campers, Trailers, etc.
- Motorized Boat or Sea Vehicle are sailboats with motors, motor boats, etc.
- Non-motorized Boats or Sea Vehicles are canoes, kayaks, etc.

If a non-motorized boat/sea vessel is chosen, then input fields are replaced with messaging stating: "Vehicle Information is not needed for this vehicle type."

Acceptance Criteria

- If multiple vehicles are being stored in the same space, the Add Vehicle button at the bottom will create an additional set of vehicle, owner and lien information fields below the first set of fields.

Screen Elements

- [A] Boat Length field only appears if the Boat Slip space type is selected.
- [B] If the only vehicle being stored is a "Non-motorized Boat/Sea Vessel" the button will read Save and Continue; otherwise it reads Confirm with Customer
- [C] This field is either Legal Owner (placeholder of "First and Last Name") if the answer to Lienholder? = "No" OR This field is either Lienholder (placeholder of "Lienholder Name") if the answer to Lienholder? = "Yes"



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Vehicle Information

Vehicle - B201

Select Vehicle / Vessel Type [dropdown] ?

Make: Make [text]

Model: Model [text]

Year: Year Made [text]

Color: Color [text]

VIN/Hull #: VIN / Hull Number [text]

Length: Vehicle Length [text] (highlighted with dashed blue border)

Owner & Lien Information

Registered Owner is Renter: Yes No ?

Proof of Ownership Scan

Lienholder?: Yes No ?

Legal Owner: First and Last Name [text] ? (highlighted with dashed blue border)

Add Vehicle

Back to Dashboard

Cancel Lease

Confirm with Customer

Save and Continue (highlighted with dashed blue border)

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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ANNOTATIONS

Acceptance Criteria if the Renter is the Registered Owner

- If the Renter is the Registered Owner, Proof of Ownership (title or registration) is required to be scanned.
- Once scanned, a preview link shows and can be clicked on to see it in a new tab.
- Either the Lienholder or the Legal Owner should be added.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Vehicle Information

Vehicle - B201

Select Vehicle / Vessel Type



Make: Make

Model: Model

Year: Year Made

Color: Color

VIN/Hull #: VIN / Hull Number

Length: Vehicle Length

Owner & Lien Information

Registered Owner is Renter: Yes No



Proof of Ownership Scan

Lienholder?: Yes No



Legal Owner: First and Last Name



Vehicle - B201

Select Vehicle / Vessel Type



Remove

Make: Make

Model: Model

Year: Year Made

Color: Color

Script

Customer Screen

Smile and say hello.

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A

- Acceptance Criteria if the Renter is the Registered Owner**
- Should Add Vehicle be clicked, another vehicle section will be added. The PM can remove the new vehicle via the Remove button.

Scale



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Vehicle Information

Vehicle - B201

Select Vehicle / Vessel Type



Make: Make

Model: Model

Year: Year Made

Color: Color

VIN/Hull #: VIN / Hull Number

Length: Vehicle Length

Owner & Lien Information

Registered Owner is Renter: Yes No



Registered Owner: First and Last Name

Owner's Authorization Scan



Lienholder?: Yes No



Legal Owner: First and Last Name



Add Vehicle

Back to Dashboard

Cancel Lease

Confirm with Customer

Script

Customer Screen

Smile and say hello.

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ANNOTATIONS

Acceptance Criteria Renter is Not the Registered Owner

- When PM selects No, Registered Owner name fields and authorization letter scan button appear.
- Once scanned, a preview link will display that when clicked will show the Owner's Authorization file in a new tab.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment

Add Merchandise

Vehicle Information

Vehicle - B201

Select Vehicle / Vessel Type



Make: Make

Model: Model

Year: Year Made

Color: Color

VIN/Hull #: VIN / Hull Number

Length: Vehicle Length

Owner & Lien Information

Registered Owner is Renter: Yes No



Proof of Ownership Scan

[Preview](#) X

Lienholder?: Yes No



Lienholder Name: Citibank



Add Vehicle

Back to Dashboard

Cancel Lease

Confirm with Customer

ANNOTATIONS

Acceptance Criteria

- If Yes is selected for the "Lienholder?" question, the Lienholder Name text box will show. If No is selected, the Legal Owner field will show.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.



Property #, Property Name, Property Address, Property Phone Number

✓

✓

3

4

5

6

Space Information

Contact Information

Lease Details

Terms & Conditions

Authorization

Payments

Vehicle Information for A322

Honda Civic Hybrid 2003
Make Model Year

Lavender
Color

12345678901234567
VIN

Cindy Walker
Registered Owner

Frank's Loansharking Service
Lienholder

□

Confirm

ANNOTATIONS

- Acceptance Criteria**
- If there are multiple vehicles being stored, each one will be displayed stacked one after the other (with scroll bar). The confirm button covers all vehicles.
 - Information is editable by PM if needed.
 - If the lessee is different then the owner, then the Registered Owner field will be visible.
 - Legal owner is displayed if it has been collected on the PM screen.
 - Lienholder displays only if there is a Lienholder.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > **Lease Agreement** > Payment

Add Merchandise

Review & Approve

Additional Addenda

Well-Water Addendum

Approved by Customer ✓

Rolling Ladder for B223

Lease Terms & Conditions

General Rental Info

Pending Approval ⋮

Premise Use/ Legal Compliance

Application Law / Jurisdiction / Venue

Insurance

Liability

Additional Charges

Customer Authorization

Pending Approval ⋮

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Acceptance Criteria

- Customer must agree to each category of legal information on the CFS as per the Leasing Requirements.
- PM can see the progress of the approvals.
- Once the Customer agrees to all the terms & conditions, that section becomes approved and they move to the Customer Authorization (signature) section.
- Lease Terms & Conditions are agreed to once for all spaces being leased in one transaction.

If the customer's lease requires one (or more) of the Well-Water or Rolling Ladder Addendum to be completed, those items would display here for the PM and on the CFS for the customer to indicate acceptance.


Property #, Property Name, Property Address, Property Phone Number

✓

✓

3

4

5

6

Space Information
Contact Information
Lease Details
Terms & Conditions
Authorization
Payments

Marion County Wellfield Protection Lease/Rental Addendum

Marion County Wellfield Protection Information

The Public Storage facility located at 6940 Shore Terrace Drive in Indianapolis, Indiana is situated within a designated Marion County Wellfield Protection Zone. As such, the use, storage and management of chemical products or the generation of wastes that can potentially contaminate the underlying groundwater are closely monitored by the county and controlled within this area to protect the city's drinking water supplies. As a tenant at this facility, you are being made aware of the sensitivity of this area in order to exercise an added degree of care and precaution in completing your work activities.

Please indicate your understanding and acceptance of the requirements of this notification by signing below and returning a copy of it to the facility manager for documentation.

ANNOTATIONS

- Acceptance Criteria**
 - Rolling Ladder and Well Water addendums (when applicable) will appear in this format to get customer acceptance of the terms of these addendums.
 - If information in the addenda is longer than the screen, it should appear in a scroll box. This is a global standard.

- Addendums Following this Format**
 - Well Water
 - Rolling Ladder

The screenshot shows a mobile application interface for Public Storage. At the top left is the Public Storage logo. To its right, there is a header area for "Property #, Property Name, Property Address, Property Phone Number". Below the header is a progress bar with six steps: Space Information, Contact Information, Lease Details, Terms & Conditions (highlighted in purple), Authorization, and Payments. The main content area is titled "General Rental Information" and contains a list of categories on the left: Premise Use, Application Law/Jurisdiction/Venue, Insurance, Liability, and Additional Charges. To the right of these categories are three checkboxes with corresponding text:

- I have inspected the space and the facility and found them satisfactory.
- Public Storage is not responsible for my goods.
- I will have access to the property and space during posted hours only.

 At the bottom left of the form is a blue link "View Full Lease Agreement", and at the bottom right is a dark grey "Accept" button.

ANNOTATIONS

Acceptance Criteria

- Each section of the Terms & Conditions (as defined in the requirements) appears on its own screen with an Accept button.
- On each screen of the Terms & Conditions, the customer must check to acknowledge each point before Accept can be clicked.
- Once all conditions in a section are checked and Accept is clicked, the customer is taken to the next screen.

PS Public Storage

Property #, Property Name, Property Address, Property Phone Number

✓
Space Information

✓
Contact Information

✓
Lease Details

4

5

6

General Rental Information ✓

Premise Use

Application Law/ Jurisdiction/Venue

Insurance

Liability

Additional Charges

Premise Use / Legal Compliance (Paragraph 5) ▶

- Only my personal property will be stored in this space.
- The total value of my goods in the space will not exceed \$5,000.
- No hazardous, flammable, explosive or perishable items will be stored.
- The space is not suitable for storage of heirlooms, precious, invaluable or irreplaceable items.
- Habitation and pets are not allowed in the space.
- The space will be empty, clean and my lock will be removed and my space will be empty and clean when I vacate.

[View Full Lease Agreement](#)

Accept

ANNOTATIONS

- Acceptance Criteria**
- Clicking on the Paragraph link displays relevant copy for this section.

Property #, Property Name, Property Address, Property Phone Number

✓

✓

✓

4

5

6

Space Information
Contact Information
Lease Details
Terms & Conditions
Authorization
Payments

General Rental Information ✓

Premise Use

Application Law/ Jurisdiction/Venue

Insurance

Liability

Additional Charges

Premise Use / Legal Compliance (Paragraph 5) ▶

Only my personal property will be stored in this space.

The total value of my goods will not exceed \$5,000.

No hazardous, flammable, explosive or perishable items will be stored.

The space is not suitable for storage of heirlooms, precious, invaluable or irreplaceable items.

Habitation and pets are not allowed.

The space will be empty, clean and My lock will be removed and my space will be empty and clean when I vacate.

[View Full Lease Agreement](#)
Accept All

ANNOTATIONS

Acceptance Criteria

- This example replaces the check boxes with one "Accept All" button.

[This alternate has not been approved by Legal at this time.]

Public Storage Property #, Property Name, Property Address, Property Phone Number

Progress: Space Information ✓ Contact Information ✓ Lease Details ✓ **Terms & Conditions 4** Authorization 5 Payments 6

General Rental Information ✓

Premise Use ✓

Application Law/Jurisdiction/Venue

Insurance

Liability

Additional Charges

Application Law/Jurisdiction/Venue (Paragraph 4) ▶

I understand Public Storage's limitation of liability is \$5,000.

[View Full Lease Agreement](#) **Accept**

ANNOTATIONS

- Acceptance Criteria**
- Clicking on the Paragraph link displays relevant copy for this section.


Property #, Property Name, Property Address, Property Phone Number

✓ Space Information
✓ Contact Information
✓ Lease Details
4 Terms & Conditions
 5 Authorization
 6 Payments

General Rental Information
✓

Premise Use
✓

Application Law/
Jurisdiction/Venue
✓

Insurance

Liability

Additional Charges

Insurance (Paragraph 6) ▶

- All personal property stored in the space is at my sole risk.
- I am required to maintain storage insurance for my goods stored in the space.
- Public Storage does not assume any risk for my goods.

[View Full Lease Agreement](#)
Accept

ANNOTATIONS

- Acceptance Criteria**
- Clicking on the Paragraph link displays relevant copy for this section.



Property #, Property Name, Property Address, Property Phone Number

Progress bar: 1. Space Information (checked), 2. Contact Information (checked), 3. Lease Details (checked), 4. Terms & Conditions (active), 5. Authorization, 6. Payments

- General Rental Information ✓
- Premise Use ✓
- Application Law/Jurisdiction/Venue ✓
- Insurance ✓
- Liability
- Additional Charges

Liability (Paragraph 7) ▶

Public Storage and its Employees are not responsible for any loss claim or damage to property or persons.

[View Full Lease Agreement](#) Accept

ANNOTATIONS

- **Acceptance Criteria**
- Clicking on the Paragraph link displays relevant copy for this section.

Property #, Property Name, Property Address, Property Phone Number

✓

✓

✓

4

5

6

Space Information
Contact Information
Lease Details
Terms & Conditions
Authorization
Payments

General Rental Information ✓

Premise Use ✓

Application Law/ Jurisdiction/Venue ✓

Insurance ✓

Liability ✓

Additional Charges

	Amount	Date Assessed
Late Fee	XX% of Monthly Rent	XXth of Month
Lien Fee 1	XX% of Monthly Rent	Xrd of Month
Lien Fee 2	XX% of Monthly Rent	Xst of Month
Lien Sale Fee	XX% of Monthly Rent	XXth of Month
Dishonored Check Charge	25.00 per check	XXth of Month

Additional Charges

[View Full Lease Agreement](#)

Accept

ANNOTATIONS

- Acceptance Criteria**
- Customer must accept the list of additional charges to proceed with the lease.
 - After the Additional Charges are agreed to, the Customer is taken to the Authorization Signature screens.
 - The amount may be either a percentage of monthly rent or a fixed dollar amount.
 - All grid data comes from the database. This data is F.P.O.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > **Lease Agreement** > Payment

Add Merchandise

Review & Approve

▶ Lease Terms & Conditions

Approved ✓

▼ Customer Authorization

B233 (5' x 5 x 4')

Customer Signature

Clear

Approve

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Acceptance Criteria

- Clear button deletes the signature in the case that the customer did not enter an appropriate, legible signature.
- The PM must approve the signature before they can continue with the lease.
- If multiple leases are being created, multiple signatures are required and must be approved by the PM individually.



Property #, Property Name, Property Address, Property Phone Number

Space Information Contact Information Lease Details Terms & Conditions **5** Authorization Payments

Lease Signature for C322

I have been given a copy of the lease and all addendums and have had the opportunity to review them prior to signing.

x _____

Please Sign Here

Clear Accept

ANNOTATIONS

Acceptance Criteria

- If multiple spaces are being rented, the customer signs for each space separately.
- After the signature for the first space is accepted by the customer and by the PM, the customer is taken to the signature screen for the next space, until all spaces are signed for individually.

Note: Apartment leasing will follow a similar process that maps to the leasing screens required. This includes displaying the Apartment Occupancy Agreement screen as rental agreement is shown.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > **Lease Agreement** > Payment

Add Merchandise

Review & Approve

▶ Lease Terms & Conditions

Approved ✓

▼ Customer Authorization

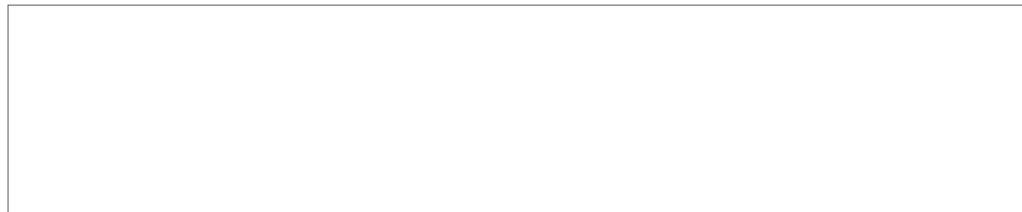
B233 (5' x 5' x 4')

Approved ✓



Customer Signature

C123 (10' x 10')



Customer Signature

Clear

Approve

Back to Dashboard

Cancel Lease

Save and Continue

Notes

+ Add Note

Date	Time	Notes	Employee
11/08/2013	11:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Multiple Leases Signature Acceptance Criteria

- Customer signs for each lease separately on the CFS.
- When the signature for a space is received and approved by the PM, it is noted as "Approved" on the screen
- When the signature is approved, the Approve button next to the signature disappears.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > **Payment**

B233 (5' x 10' x 4') Rental Fees		Due Now	Next Payment Due 12/01/2014
Monthly Rent		\$x,xxx.xx	\$x,xxx.xx
Promotion (50% Off 1st Month Special)		- \$x,xxx.xx	\$x,xxx.xx
Insurance (\$3,000 Coverage)		\$x,xxx.xx	\$x,xxx.xx
Prorate & Prepay	Prorate Only (paid through xx/xx/xxx) ▼	\$x,xxx.xx	\$x,xxx.xx
1-Time Administrative Fee		\$x,xxx.xx	\$x,xxx.xx
B233 Storage Space Subtotal		\$x,xxx.xx	\$x,xxx.xx

Merchandise

Merchandise [Add / Edit Cart](#)

A ▼ xx Avail. **B**

Lock for free	-\$x,xxx.xx	<input type="button" value="Remove"/>
10% off boxes	-\$x,xxx.xx	<input type="button" value="Remove"/>

C

Free mattress bag	-\$x,xxx.xx	<input type="button" value="Remove"/>
-------------------	-------------	---------------------------------------

Sales Tax \$x,xxx.xx

Merchandise Subtotal \$x,xxx.xx

Other Charges Previous Balance \$x,xxx.xx

Total \$x,xxx.xx

Payment Methods

▼ \$x,xxx.xx

+ Add Payment Method

Total Remaining \$x,xxx.xx

Script Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

>Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Acceptance Criteria

- If a space is in a state or region with parking or rental tax, that tax line appears below the promotion line.
- If a balance from a previous rental is included, it appears in the Other Charges section. If there is no Previous Balance, that section does not appear.
- Multiple payment methods can be used. See pages 64-68 for this functionality.
- For Credit/Debit or Checking payments, the PM is prompted to enroll the customer in Auto Pay. refer to correct page(s) in this deck.
- If there are no merchandise promotions available, the Select Promotion dropdown will not display. They can choose not to apply a promotion even if promotions are available.

Prorate & Prepay Amount

- Options are
 - None (default for anniversary billing)
 - Prorate Only (paid through xx/xx/xxxx) - this would only show for first of the month properties (default for 1st of the month)
 - Prorate Plus Prepay Through xx/xx/xxxx - this would only show for first of the month properties
 - Prepay Through xx/xx/xxxx - this only shows for anniversary billing properties
- Next Payment column date at the top adjusts based what option the PM selects in this field (prorate or prepay options push out the next due date)
- For properties on anniversary billing, prorate does not exist. That line item become Prepay only.

A The PM may apply multiple promotions based on what the customer is purchasing. The PM selects the desired promotion from the dropdown and hits apply, which adds the promotion to the order. If there are additional promotions available, the process would continue.

B The system will calculate the number of possible promotions available based on the specific merchandise in the customer's cart.

C The PM may apply coupons in a similar manner to promotions based on what the customer is purchasing. The PM types the coupon code and hits apply, which checks whether the coupon is valid, then adds it to the order.



Back to Dashboard

Cancel Lease

Submit



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > **Payment**

Add Merchandise

Script

Customer Screen

Cxxx Standard (5' x 10') Rental Fees

Due Now **Next Payment**
Due 04/01/2015

Monthly Rent	\$104.00	\$104.00
Promotion (1st Month \$1 Special)	-\$103.00	\$0.00
Insurance (\$3,000 Coverage)	\$14.00	\$14.00
Prorate & Prepay	Prorate plus Prepay Through 03/31/2015 A	\$445.35
1-Time Administrative Fee	\$22.00	\$0.00
Storage Space Cxxx Subtotal	\$482.35	\$118.00

Dxxx Standard (10' x 10') Rental Fees

Next Payment
Due 12/01/2014

Monthly Rent	\$150.00	\$150.00
Insurance (\$4,000 Coverage)	\$24.00	\$24.00
Prorate & Prepay	None A	\$0.00
1-Time Administrative Fee	\$22.00	\$0.00
Storage Space Dxxx Subtotal	\$196.00	\$174.00

Total Rental Fees

\$678.35

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

The PM will have the ability to select a paid through date (per space) — the first date in the list will be through the end of the second calendar month for first of the month properties (the prorate).

Example: if the customer is moving in on the 15th of November (at a first of the month property), the first paid through date will be 12/31/2014.

The customer will have the option to pay in advance for an additional 12 months over and above their first month.

Acceptance Criteria

- Each rental space has its own itemized section.
- Each space has its own prorate and prepay selection.

A

Scale: 1440 x 900. Not to actual scale.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

Merchandise & Other Charges

Merchandise Add / Edit Cart	\$17.65
Sales Tax	\$1.59
Previous Balance	\$24.00
Merchandise & Other Charges Subtotal	\$43.24

Coupon Codes

Enter Coupon Code

+ Add Additional Code

This area for payments will change out during the payment process, as detailed on the next screens.

Total \$86.48

Payment

A

Select Method ▼

\$86.48

Apply

Cash

\$X,XXX.XX

Remove

Visa XXXX

\$X,XXX.XX

Remove

B

Total Remaining

\$86.48

Back to Dashboard

Cancel Lease

Submit

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

The blue outline highlights the area that changes out for payments, as indicated on the next four pages.

A

The PM will select the payment type, then enter the amount for that payment type (defaults to full amount due or remaining amount due if other methods have already been added), and hits apply. Depending the payment type, more information may be required before the payment is applied (see next several pages for details).

B

Once a payment has been added, prior to hitting "Submit" the PM may remove a specific payment type/amount.

Select Payment Method

Payment		
Select Method ▼	\$131.24	Apply
Cash	\$X,XXX.XX	Remove
Visa XXXX	\$X,XXX.XX	Remove
Total Remaining	\$131.24	

ANNOTATIONS:

Payment Method Dropdown:

- Cash
- Money Order
- Check
- Traveler's Check
- Credit / Debit Card

- This dropdown may be limited if the lease is for an existing customer — either because they are paying a prior balance (no checks will be accepted) or because their account is flagged for no checks and/or no credit cards.

Manual Payment If card scan is not working, then user can enter payment manually.

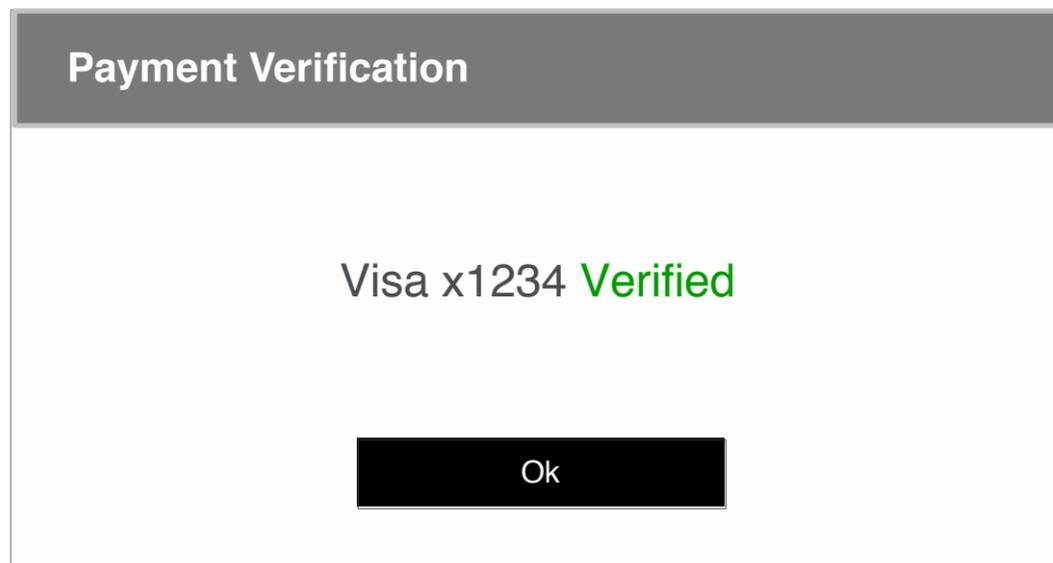
Payment

Credit/Debit Card ▼	\$118.00	Apply
Enter Credit / Debit Card		
Name On Card:		Scan
Credit / Debit Card Number:		
Expiration Date:	MM ▼	YY ▼
<input type="checkbox"/> Assign AutoPay?		
		Authorize
Total Remaining	\$118.00	

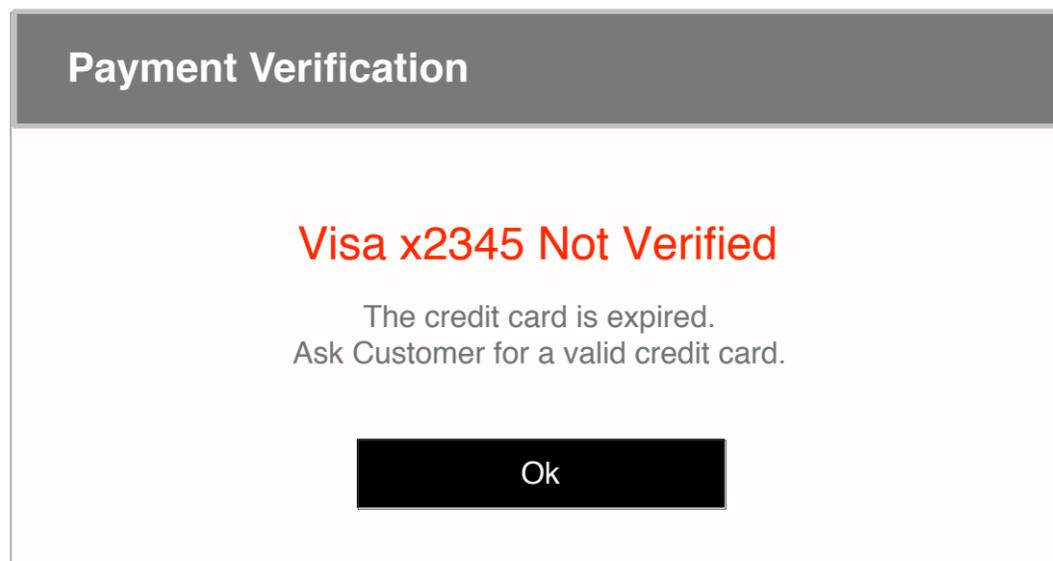
ANNOTATIONS:

Acceptance Criteria Credit / Debit Entry

- Fields appear for the PM to manually enter the payment info manually if needed or confirm scanned payment method.
 - There should be basic field validation when they're typed in, but the CC/ Debit verification is done via the Authorize button.
 - The month and year are entered via pulldowns.
 - The only payment type that gets authorized is credit/debit cards.
-
- **When Authorize is Clicked:**
 - For credit and debit cards, a hold authorization is run, resulting in an approved/disapproved response.
 - Modal message displays indicating whether or not the authorization is successful.



A

**ANNOTATIONS:****Acceptance Criteria**

- After credit/debit card authorization is complete, system will display one of these modals, indicating the results.

A If a credit or debit card isn't validated, this modal will pop up, prompting the PM to ask the customer for a valid credit card.

- Actual error messages to be written by copywriter based on errors returned by cc processing system.
- All PM is able to do is click OK and return to the screen below.
- The credit or debit card info will be removed.

- Once a payment line is verified:
 - That line's amount is subtracted from the Total Remaining.
 - Payment amounts are always editable until submitted — if a credit or debit card is changed, it will need to be reconfirmed.
 - Payment line shows the payment used, such as Visa and the last four digits of the card.

Payment

Check

Enter Credit / Debit Card

Enter Checking Account Info

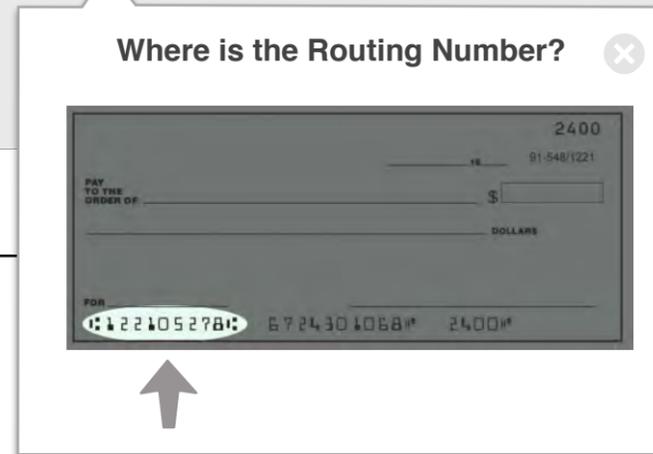
Bank Routing Number:

Checking Account Number:

Check Number:

Assign AutoPay?

Total Remaining



ANNOTATIONS:

If Checking Account is selected, a Scan Check button appears for the PM to click and scan (design follows the Scan Credit/Debit button). Check information may also be manually entered. NOTE: Check number must always be manually entered - not populated by the scan.

- Help text shows images indicating where the routing number and account number appear on checks.

ANNOTATIONS

- **Acceptance Criteria**
- After the PM has entered a payment method, if auto pay is selected, the CFS shows the Auto Pay addendum.
- The Auto Pay addendum displays the space number, payment method and legal text.
- Customer must enter a signature and click Accept.
- If multiple spaces are being assigned to auto pay, each are signed for and accepted separately.
- Credit/debit card numbers are obscured as per requirements.



Property #, Property Name, Property Address, Property Phone Number

Automatic Payment Authorization for C567

Visa xxxx xxxx xxxx 0987
Credit Card

I hereby authorize PUBLIC STORAGE to charge the above-referenced account automatically each month, either as a credit card transaction or an electronic debit entry to my checking account, and to apply said charge toward the monthly payment of the charges agreed upon in my Lease/Rental Agreement with PUBLIC STORAGE for the storage space number(s) stated above. I understand that I will remain responsible for monthly charges and additional late fees should there be insufficient funds or credit available or if my credit card is canceled or otherwise made unavailable for payment.

I understand that it shall remain my obligation to notify PUBLIC STORAGE in writing or verbally two (2) days in advance of my intent to terminate my tenancy. I further understand that if I vacate my space(s) without advising PUBLIC STORAGE, my credit card will be charged for the final balance due on the date that PUBLIC STORAGE becomes aware that I have vacated the storage space(s).

x _____

Clear Please Sign Here

Accept



ANNOTATIONS

Acceptance Criteria

- Example of checking account layout if a checking account is being used for Auto Pay.
- Checking account number is obscured as per requirements.
- Routing number is not displayed.



Property #, Property Name, Property Address, Property Phone Number

Automatic Payment Authorization for C567

xxxxx0000
Checking Account

I hereby authorize PUBLIC STORAGE to charge the above-referenced account automatically each month, either as a credit card transaction or an electronic debit entry to my checking account, and to apply said charge toward the monthly payment of the charges agreed upon in my Lease/Rental Agreement with PUBLIC STORAGE for the storage space number(s) stated above. I understand that I will remain responsible for monthly charges and additional late fees should there be insufficient funds or credit available or if my credit card is canceled or otherwise made unavailable for payment.

I understand that it shall remain my obligation to notify PUBLIC STORAGE in writing or verbally two (2) days in advance of my intent to terminate my tenancy. I further understand that if I vacate my space(s) without advising PUBLIC STORAGE, my credit card will be charged for the final balance due on the date that PUBLIC STORAGE becomes aware that I have vacated the storage space(s).

x _____

Clear Please Sign Here

Accept





Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Lease Details > Lease Agreement > **Payment**

Approve Signature

Visa x0000



Customer Signature

Approved ✓

Autopay B565 (5' x 5')



Customer Signature

Approved ✓

Autopay B666 (10' x 10')



Customer Signature

Clear

Approve

Back to Dashboard

Cancel Lease

Save and Continue

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

- When a customer signs for their payment, the PM must approve the signature before moving on. If the signature is not acceptable/legible, the PM will click clear, which will reset the signature box on the CFS for the customer to sign again.

Public Storage Property #, Property Name, Property Address, Property Phone Number Jenny Brown

Transaction Complete

Customer Name: **Geetha M. Vivekaandamorthy**
 Account: **M49847383**
 Space: **B233 (5' x 5' x 4')**
 Date: **08/25/14**
 Amount: **\$118.00**

Employee ID:

Ok

Transaction Complete

Customer Name: **Geetha M. Vivekaandamorthy**
 Account: **M49847383**
 Space: **B233 (5' x 5' x 4')**
 Date: **08/25/14**
 Amount: **\$118.00**

Change Due: \$2.00
 I have given cash change to the customer

Employee ID:

Ok

ANNOTATIONS

- A** After the Payment has been processed:
- At this point, the customer has signed for payment methods on the customer screen, if needed.
 - Pop-up window with Transaction info appears for User to enter employee ID and complete the lease.
 - User cannot exit the modal until entering ID and clicking OK.
 - If multiple spaces are paid for at one time, all spaces are indicated on the modal, each on its own line.

- B** If Change is Due:
- Transaction Complete modal shows the change due.
 - PM must check the box to confirm he has given the cash change to the customer.
 - On CFS, customer will verify they have received change due.

Scale: 1440 x 900. Not to actual scale.

Public Storage Property #, Property Name, Property Address, Property Phone Number

Jenny Brown

LEASING

Confirm Space > **Contact Information** > Addendums > Lease Agreement > Payment

Customer Information

Identification: Driver's License

Name: Jessie

Address: 12345 Smith St.

Los Angeles

Phone: Mobile 323 221 2207 Text OK + Add

Email: bbb@ccc.com No Email + Add

Back to Dashboard Cancel Lease Customer Lookup

Notes + Add Note

Date	Time	Notes	Employee #
11/08/2013	1:14 AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	53827

Your lease is complete!

Gate Code for B233: 45678
Please write down and give to customer.

Ok

Script Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

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Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

A When lease is submitted and complete, the user sees this modal. Selecting "OK" takes them back to the PM Dashboard.

The gate code is displayed on the modal for the PM to write down and distribute to the customer.

The gate code will also be displayed on the Customer Dashboard for future reference.



Property # _____ Property Name _____ Property Address _____ Property Phone Number _____

Jenny Brown

Buy Merchandise

Browse by

All

Locks

Boxes

PAKS

Tape

Covers

Misc.

Lock Type A (short mill)-NON PS

Description section

SKU #792
7 available

\$6.00

▲

1

▼

Lock Type B

Description section

SKU #549871
7 available

\$6.00

▲

0

▼

Lock Type C

Description section

SKU #549871
7 available

\$6.00

▲

0

▼

Lock Type D

Description section

SKU #549871
7 available

\$12.00

▲

3

▼

Cart

Lock Cyl (short mill)-NON PS	- 1 +	\$6.00	Remove
Lock Type D	- 3 +	\$36.00	Remove
Dish Kit	- 1 +	\$16.75	Remove
Subtotal:		\$58.75	Remove All

ANNOTATIONS

Items are organized by categories. Each category displays all available items in inventory at that specific location.

A PRODUCT SECTIONS
These radio buttons allow the PM to display the products one category at a time. The default section is All.

B ITEM INFORMATION
The item's name, short description, SKU, quantity in inventory and price are located here. (40 characters max per line.)

C SELECT ITEM
The user adds or subtracts the amount of an item they want to purchase via the up and down arrows. Up adds while down subtracts amounts. Alternately, the PM can type the number in the box.

D ITEM IMAGE
This is the picture of the item. All of the images are the same size.

E ADD ITEMS TO CART BUTTON
Selected items are added to the cart when the user presses this button. When this button is clicked the items in the above section zero out to avoid duplicates.

F CART
Selected items appear in this area. The user can see the number, price and cost of an item. The subtotal is also included. The user also has the option to remove all items from the cart. The user can add and subtract items in the cart.

G CLOSE BUTTON
The Close button closes the modal and saves the items in the system for checkout later in the process. The closing of this modal returns the user to the page of the lease flow from which it opened.

Scale: 1440 x 900. Not to actual scale.


Property #, Property Name, Property Address, Property Phone Number

✓
Space Information

✓
Contact Information

✓
Lease Details

✓
Terms & Conditions

✓
Authorization

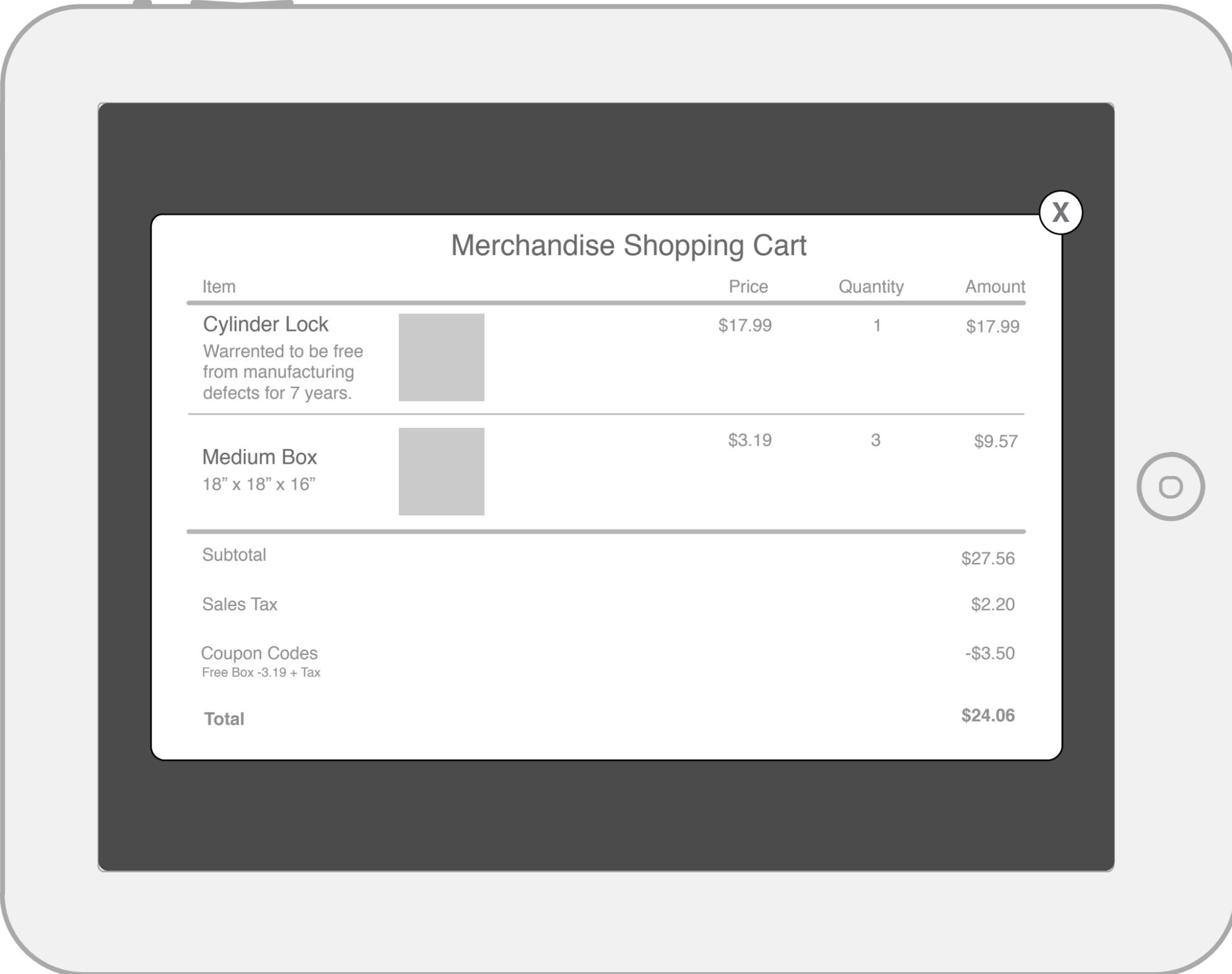
6
Payments

	Due Now
B233 Monthly Rent	\$104.00
Promotion (50% Off 1st Month Special)	- \$52.00
Insurance (\$3,000 Coverage)	\$14.00
Prorate & Prepay View Prorated Information	\$0.00
1-Time Administrative Fee	\$22.00
Merchandise View Shopping Cart	\$19.24
Previous Balance	\$24.00
Total Due	\$126.24

Next Payment
Due 12/01/2014

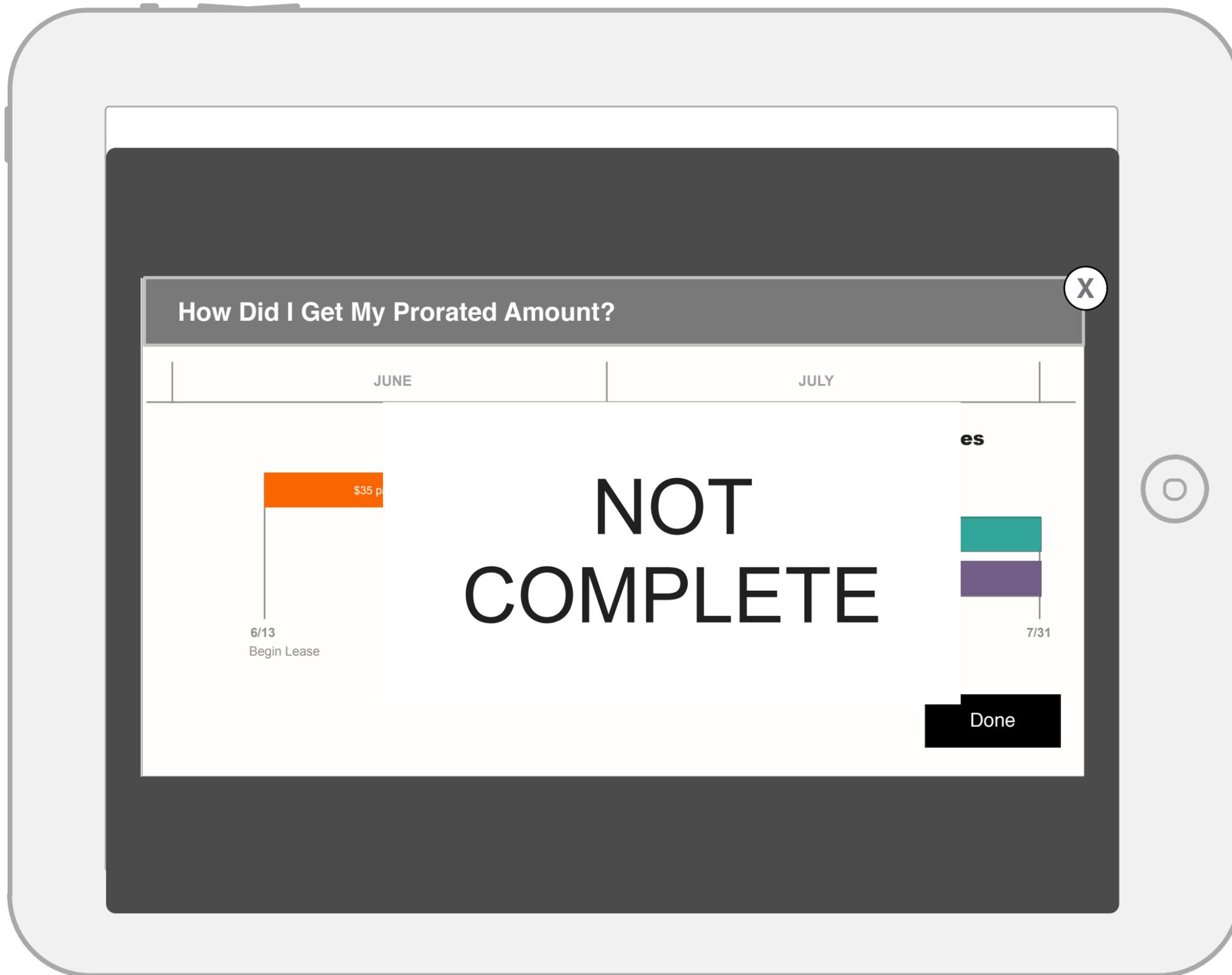
ANNOTATIONS

- **Acceptance Criteria**
- Customer sees itemized list of all charges on the payment screen.
- Monthly charges are separated by space.
- If the property has 1st of the month billing, the prorate and prepay line shows with a link to view the prorate modal. If the property has anniversary billing, the prepay line will only show if the customer is choosing to prepay future months.
- Merchandise and previous balance lines follow the space itemization(s) if they have amounts.
- The Merchandise Cart should be clickable so the customer can see a modal itemized with the items being purchased.
- Lines that don't apply (No taxes or no insurance options) are not shown.
- The customer presses the Accept button to proceed.



ANNOTATIONS

Merchandise Shopping Cart modal appears when the View Shopping Cart link is selected.
 Coupon codes and promos appear should there be any used in the amount tally.
 To close modal, user selects the x.



ANNOTATIONS

Prorate Modal appear when the View Prorated Info link is selected.

To close modal, user selects the x.



Property #, Property Name, Property Address, Property Phone Number

✓ ✓ ✓ ✓ ✓ 6

Space Information Contact Information Lease Details Terms & Conditions Authorization **Payments**

\$340.00
Amount

Visa 4321
Payment Method

I agree to pay the above amount according to my card issuer agreement.

x Please Sign Here

ANNOTATIONS

Acceptance Criteria

- Signatures are needed for all payment methods used requiring signatures.
- Payment signature screen indicates the payment method and amount being charged.
- Signature field has a clear button so the customer can sign and erase if necessary.
- Once Accept is hit for a signature, the PM must approve it before this screen will advance.
- If multiple payment methods requiring signatures are used, they appear in the order they were entered by the PM.
- Payment methods that don't require a signature don't show on CFS.

ANNOTATIONS

Acceptance Criteria

- If change is due, the customer is prompted to sign to confirm that they've received the cash change due to her.
- After confirming the change has been removed, the Print and/or Email Receipt Screen shows.
- If no change is due, this screen would not show.



Property #, Property Name, Property Address, Property Phone Number

Payment Complete. Thank you!

I have received the cash change indicated below.

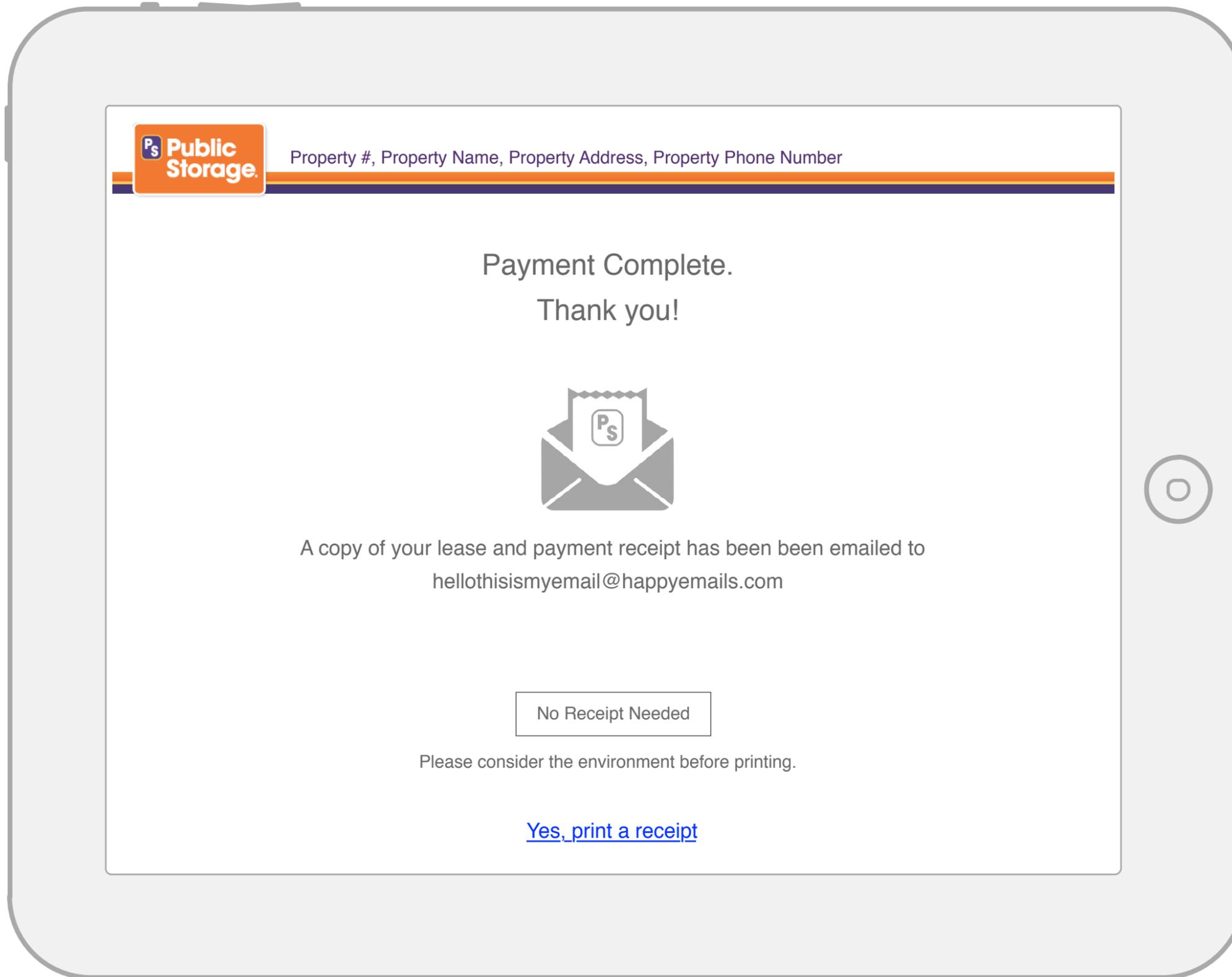
Cash	\$120.00
Amount Due	\$104.00
Change Due	\$16.00

x _____

Clear Please Sign Here

Accept





ANNOTATIONS

Acceptance Criteria

- The transaction receipt and associated documents are automatically emailed to the email on the customer's account (or Preferred email if multiple emails are on the account).
- The screen displays the email address the receipt and documents were sent to.
- The customer can click on Print Copies if a printed copies of the receipt and documents are desired.
- If "No printed copies are needed." (final text TBD during copywriter pass) is tapped, no receipt or documents are printed and the transaction is finished.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown

LEASING

Confirm Space > Contact Information > Terms & Conditions > Payment

Customer Information

Employee No.: 123456

Look Up

Name: Geetha M. Vivekaandamorthy

Identification: Driver's License State Number

Address: 12345 Smith St. Street 2

Los Angeles CA 90001

Phone: Mobile 323 221 2207 Text OK + Add

No Email

Email: jessiebessie@email.com + Add

Additional Occupants

Name: First Middle Init. Last

Phone: Select Type

Add Occupant

Pet Type: Quantity: + Add Pet

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Acceptance Criteria

- The employee is looked up when the DM enters the employee's ID.
- Only a DM may complete an apartment lease. The employee renting the apartment must exist as an active employee in the system.
- No Melissa data is used on Apartment Leases.
- Multiple Additional Occupants can be entered.
- First Name, Last Name and Phone are required for any Additional Occupant entered.
- Additional Occupants and pets are not required.

Back to Dashboard

Cancel Lease

Confirm with Customer

Scale: 1440 X 900. NOT TO ACTUAL SCALE.


Property #, Property Name, Property Address, Property Phone Number

1
✓
✓
✓

Contact Information
Terms & Conditions
Authorization
Payment

Contact Information

XXXXX
Employee ID.

Geetha M. Vivekaandamorthy

Driver's License (CA) 000000000

12345 Smith St.
Los Angeles, CA 90001

(323) 221-2207
Mobile | Preferred | Text OK

Additional Occupant

Cindy Walker

(323) 221-2207
Mobile

Dog	1
<small>Pet Type</small>	<small>Quantity</small>

Confirm

ANNOTATIONS

- Acceptance Criteria**
- The Property Manager information is displayed for the PM to accept.
 - If there is no additional occupant, then the Additional Occupant or Pets those sections will not appear.

PS Public Storage

Property #, Property Name, Property Address, Property Phone Number

✓
Contact Information

2

✓
Authorization

✓
Payment

Terms & Conditions

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Accept

ANNOTATIONS

- **Acceptance Criteria**
- This page displays the terms and conditions for the apartment lease. If the PM agrees they press Accept.
- All content is F.P.O.
- Authorization for the lease would show next (signature page).

NOTE: The DM would see a review screen similar to the one for a regular lease. It would include the T&C as they are accepted, as well as the lease authorization signature with the same functionality as the normal lease review page.



Property #, Property Name, Property Address, Property Phone Number



Jenny Brown



LEASING

Confirm Space > Contact Information > Terms & Conditions > **Payment**

Apartment Rental Security Deposit Fee	Due Now
Total	\$1000.00
Payment Methods	
Select Method ▼	\$500.00 <input type="button" value="Apply"/>
Visa XXXX	\$500.00 <input type="button" value="Remove"/>
Total Remaining	\$500.00

Back to Dashboard

Cancel Lease

Submit

Script

Customer Screen

Smile and say hello.

Consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit ab id aletasoich.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

ANNOTATIONS

Security Deposit Payment
See requirement document for specifics.
There is no rental fee.

Scale: 1440 x 900. Not to actual scale.

Public Storage Property #, Property Name, Property Address, Property Phone Number Jenny Brown

LEASING Confirm Space > Contact Information > Lease Details > Lease Agreement > Payment Add Merchandise

Customer Information

Individual Lease Business Lease

Name: First

Identification: Driver's License

Address: Street 1

Int'l ?

City

Phone: Mobile

No Email

Email: Email Address + Add

On Active Military Duty?: Yes No

Tax Exempt?: Yes No

Back to Dashboard Cancel Lease Look Up Customer

Notes + Add Note

Date	Time	Notes	Employee
11/08/2013	11:14AM	Morbi leo risus, porta ac consectetur ac, vestibulum at eros	Jeff H.

Are you sure you want to cancel your lease?

Select Reason for Cancellation

Employee ID:

No Yes

ANNOTATIONS

- When a user wants to cancel the lease, this modal will appear.
- A Cancel Lease Modal**
 - In order to cancel a lease, the PM needs to select a reason for the cancellation from a pulldown.
 - Once the PM has selected a reason, they enter their employee ID.
 - The PM can resume with the lease should they need to by selecting "No" to exit this modal without canceling the lease.

Scale: 1440 x 900. Not to actual scale.

2014-08-02 CH
v1 first delivery of final wireframes to go to developer for discussion.

2014-08-02 JMH
v2 updates based on dev notes.

2014-08-13 CH
v2 additional updates based on dev notes.

2014-08-29 CH
v2.1 updated with Richard's final decision on approval process flow and on international country fields.

2014-09-19 CH
v2.2 updated based on reordering of customer approval.

2014-10-08 JH
v3.2 massive update inclusive of payments and merchandise.

2014-10-24 DF
v3.2.2 Update to payment coupon apply annotation.

2014-11-11 DF
v3.2.3 Updated with revised Individual vs. Business lease.

2014-11-11 DF
v3.2.4 Updated with revised merchandise page and revised the promotions page (23).

2014-11-12 DF
v3.2.5 Revised Specials pulldown to remove price amount.

2014-11-13 DF
v3.2.6 Updated annotations for promotions.

2014-11-13 DF
v3.2.7 Updated promotion pulldown to be a text field.

2014-12-03 DF
v3.2.10 Updated and removed button greyed-out function.

2014-12-03 DF
v3.2.11 Updated via Katharine's comments.

2014-12-08 DF
v3.2.12 Updated via Jennifer's comments.

2014-12-08 DF
v3.2.13 - 14 Updated via Jennifer's comments.

2014-12-15 DF
v3.2.15 Updated via Ann's comments.

2014-12-16 DF
v3.2.16 Updated via comments and Back to Dashboard Modal added in.

2014-12-17 DF
v3.2.17 Updated with Cancel Lease Modal and fixed misc. items.

2014-12-18 DF
v3.2.18 Edit customer information function added.

2015-1-09 DF
v4 Revised after roundtable meeting at Public Storage

2015-1-19 RP
v4.1 Revised annotations, merged Leasing_CustomerFacingScreen deck.

2015-1-20 DF
v5 Revised document and added AutoPay Addendum and CFS pages to document.

2015-1-27 RP
v6 Revised Customer Leasing-Contact Info - Customer Look-up page. Corrected all post-proof reading edits.

2015-02-02 RP
v7 Updated per comments provided by RC/KM/JH.

2015-02-12 DF
v9 Updated:
- Removed cylinder and floor from features column.
- Modified add space section to show current space indicators.
- Moved No Email checkbox
- Removed second email field label.
- Removed scan ID from Business lease screen.
- Made identification fields in contact info editable.
- Added Melissa Data functionality per RC recommendation.
- Added Additional Authorized Access checkbox to Emergency contact page.

2015-02-12 DF
v9 Updated (CONT):
- Removed duplicate leasing addendum page.
- Moved help button on Questionnaire page.
- Deleted remove button from Leasing addendum screen (loans).
- Added placeholder text to form fields on military addendum.
- Made print button conditional on fiduciary addendum.
- Made space drop down conditional on multiple addendum screens.
- Changed lien holder radio button from 'no' to 'yes' on parking addendum page.
- Re-named Prorate and Prepay to Prorate plus Prepay (through xx/xx/xxxx)
- Moved Property manager authorization page after terms and conditions page.
- Revised modal layouts.
- Revised Question buttons
- Revised Prorate modal.
- Added Parking Addendum: Multiple Vehicles

2015-02-18 RCraig and KM
v10 Updated:
- Added back rental unit level features that had been incorrectly deleted in last round for product grid results that include a Space # - various pages
- Moved "Int'l" checkbox to the left on address form pages. Location in v9 leaves no place for error text for the City field - various pages
- Deleted duplicate field labels - Page 8
- Clarified modal header text and tweaked layout slightly - Page 10
- Fixed/altered annotations - Pages 3, 4, 5, 7, 8, 10, 14, 15, 18, 32, 43, 77 and others
- Fixed field label - Page 47
- Adjusted spacing of coupon line items & corrected some global standards issues - Page 61, 62
- Reverted to v8 style and corrected date issues - Page 77
- Added conditional element indicator p 3, 7, 8, 9 and others
- Add checkmark to space pg 3
- removed bolding on text pg 4
- fixed calendar icon position; fixed date highlighting in calendar pop-up pg 5
- removed extra artifacts pg. 8
- add missing element pg 14
- fixed inconsistencies with ID fields on various pages
- changed button text p 24
- Moved annotations from p 30 to p 29 (first version of the screen)
- added new help icon to pg 36
- moved preview link to match positioning on other pages pg 39
- fixed date inconsistency pg 39
- add description of promotion and coupon application functionality to pg 61
- corrected breadcrumb on page 83
- moved the security deposit payment signature screen to correct position in the flow
- added drop down arrow to cancellation reason modal pg 87

2015-03-02 RCraig and KM
v 11 Updated:
- add leasing version of the assign/re-assign space modal
- add conditional section to leasing review step for well-water and/or rolling ladder addendum acceptance