

INSOMNIAC StoreTracker™

Daily Tasks & Task Management

Customer Guide Last Updated: June 2026

What Are Tasks in StoreTracker?

Tasks are the core unit of work in StoreTracker. They give your team a clear, trackable record of what needs to get done and give leadership real-time visibility into what is getting done without anyone having to send a report or make a phone call.

Tasks in StoreTracker fall into two categories:

Type	Description
Daily Tasks (Repeating)	(Repeating)Your daily operational checklist auto-generates every morning for your team
One-Off Tasks	Ad hoc tasks created manually for a specific need unit repair, vendor follow-up, inspection, etc.

Daily Tasks - Your Team's Daily Checklist

Your daily checklist is configured during onboarding and auto-generates every morning based on your facility's operational workflows. Your team does not need to create these, they appear automatically and are ready to complete.

How to access your daily tasks:

- Log into StoreTracker
- Select **Operation > Daily Tasks** from the left navigation menu
- Your checklist for today will be listed — each item tied to your site and ready to action

How to complete a task:

For a detailed update select the **View** icon then open **Task Details**. From here you can update the status, add notes, assign an employee, or assign a vendor. Save when done — the update is logged with your name and timestamp automatically.

Dashboard

OPERATION

Daily Tasks

Task Search

Sites

Units

Assets

REPORTS

Task Reports

Unit Reports

Asset Reports

Scan Reports

Employee Reports

Scheduled

SETTINGS

Tasks & actions

Sites & units

Vendors

Team Members

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StoreTracker

Search...

✓

Event

→

Facility Manager

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☰

Daily Tasks

Listing 4 of 4

Select Site...

TASK	SITE	UNIT	PRIORITY	REQUEST DATE	REQUEST BY	STATUS	DUE DATE	COMPLETE	SKIP	VIEW	NOTES
■ INSONMNIAC Self Storage - Mo (2)											
☐	Inspect Gate	03 -- INSONMNIAC Self Storage - Mo		06/02/2026 - 11:55:11 AM	System	New		☒	☐	🔍	
☐	Inspect Keycards	03 -- INSONMNIAC Self Storage - Mo		04/08/2026 - 9:00:22 AM	System	New		☒	☐	🔍	
■ QA Site (2)											
☐	Inspect Gate	faked -- QA Site	1	05/04/2026 - 9:23:57 AM	kaley qa	New		☒	☐	🔍	05/04/2026 - 9:23:57 AM (kaley qa) : aaaaaaaaaaaaaaaaaa
☐	Inspect Gate	faked -- QA Site	1	05/04/2026 - 9:35:00 AM	kaley qa	New		☒	☐	🔍	05/04/2026 - 9:35:00 AM (kaley qa) : Task updated.

+

Add New Daily Task

📄

Export

💡 About Daily Tasks

Daily tasks are recurring tasks assigned to your sites. Complete or skip them each day as needed.

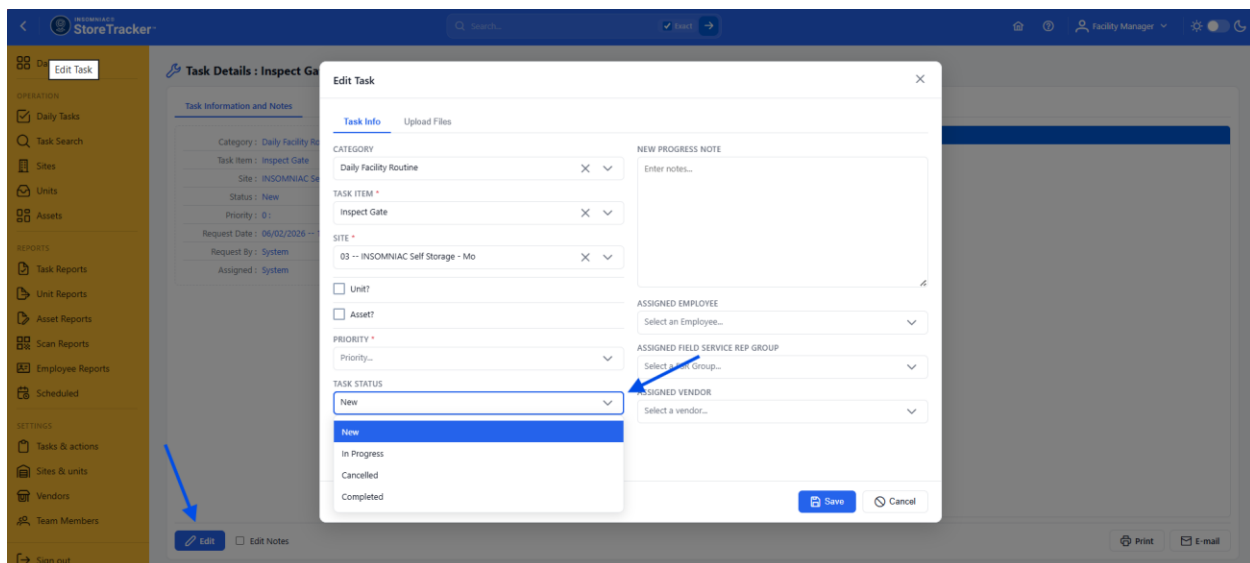
💡 Tips

- Use the site dropdown to filter tasks for a specific site.
- Click the green check on a row to complete a single task instantly.
- Click the red X on a row to skip a single task -- provide a reason.
- Use checkboxes to select multiple tasks, then Complete or Skip them in bulk.
- The site header checkbox selects every task at that site.

Daily Tasks : Listing 4 of 4

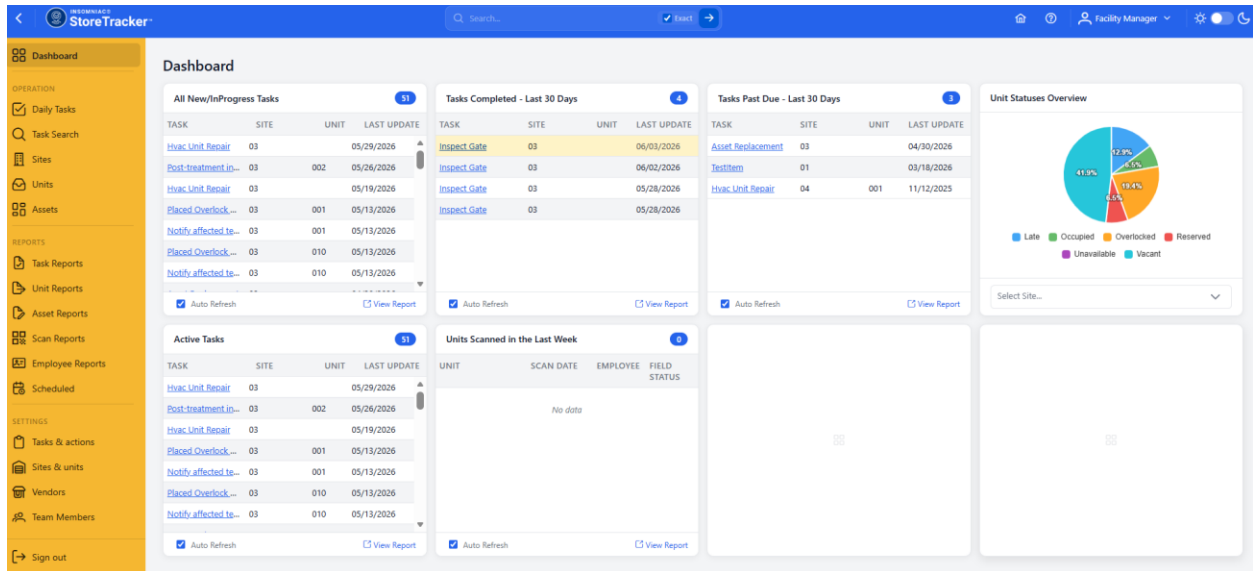
Select Site...

TASK	SITE	UNIT	PRIORITY	REQUEST DATE	REQUEST BY	STATUS	DUE DATE	COMPLETE	SKIP	VIEW	NOTES
INSOMNIAC Self Storage - Mo (2)											
☐	Inspect Gate	03 -- INSOMNIAC Self Storage - Mo		06/02/2026 -- 11:55:11 AM	System	New		☒	☐		
☐	Inspect Keypads	03 -- INSOMNIAC Self Storage - Mo		04/08/2026 -- 9:00:22 AM	System	New		☒	☐		View
QA Site (2)											
☐	Inspect Gate	fakeid -- QA Site		1	05/04/2026 -- 9:23:57 AM	kaley qa	New	☒	☐		05/04/2026 -- 9:23:57 AM (kaley qa) : aaaaaaaaaaaaaaa
☐	Inspect Gate	fakeid -- QA Site		1	05/04/2026 -- 9:35:00 AM	kaley qa	New	☒	☐		05/04/2026 -- 9:35:00 AM (kaley qa) : Task updated.



Status	What it means
New	(Repeating)Your daily operational checklist auto-generates every morning for your team
In Progress	Ad hoc tasks created manually for a specific need unit repair, vendor follow-up, inspection, etc.
Complete	Task is done logged with employee name and timestamp
Cancelled	Task was not applicable or was intentionally skipped with a reason

What your DM and leadership see: Every completed task is visible in real time on the dashboard and in reports. No additional reporting is needed from your team the data is already there.



Task Search - Finding Any Task

Task Search is how you find any task — past, present, or completed — across your facility or portfolio.

How to get there:

- Select **Operation > Task Search** from the left navigation menu

How to search:

1. Select your **Site** — required
2. Select a **Task Item** if you want to narrow to a specific task — optional
3. Select your **Report Type** — defaults to New/In Progress
 - a. Completed and Cancelled searches require a date range
4. Click **Search**

Task Search

Search Options | Saved Reports (0) | Report Subscriptions (4)

SITES 1 SELECTED

Select site group...

☐ Select All

☐ 01 -- INSONMIAC Self Storage - Phoenix

☒ 03 -- INSONMIAC Self Storage - Mo

☐ 04 -- INSONMIAC Self Storage - Lisa

☐ 05 -- INSONMIAC Self Storage - Jordan

☐ 06 -- INSONMIAC Self Storage - Jorge

☐ 07 -- INSONMIAC Self Storage - James

☐ 08 -- INSONMIAC Self Storage - Kelly

☐ 09 -- INSONMIAC Self Storage - Bob

☐ 10 -- INSONMIAC Self Storage - Shari

☐ aaaa -- aaaaaa

☐ faked -- QA Site

TASK ITEMS 40 SELECTED

Select Task Category...

☒ Select All ☐ High Priority

☒ Call Auction Winner

☒ Ceiling Repair

☒ Confirm Installation of Asset

☒ Coordinate billing adjustments

UNIT STATUSES 0 SELECTED

☐ Select All ☒ Include Site Tasks

☐ Late

☐ Occupied

☐ Overlocked

☐ Reserved

FIELD STATUSES 0 SELECTED

☐ Select All

☐ Recently Vacated

☐ Ready to Rent

☐ No Contact 90 Days Customer

☐ Scheduled for Unit Transfer

PROGRESS 0 EMPLOYEES SELECTED

Progress Type...

☐ Select All Employees

☐ Lisa Keller

☐ aaa kaley

☐ Andrew Fishburn

REPORT TYPES & OPTIONS

☒ New / Progress No Date Range

☐ Completed

☐ Cancelled

EMPLOYEES 0 SELECTED

☐ All Employees

☐ Lisa Keller

☐ aaa kaley

☐ Andrew Fishburn

SORT BY

SORT BY: Selected Date Type DIRECTION: Descending

Additional Options | Reset | Search

About Task Search

Search for tasks across all your sites using multiple filter criteria. Save frequently-used searches as reports for quick access.

Tips

- Select sites, task items, and statuses to narrow your search.
- Use "Report Types" to search New, Completed, or Cancelled tasks with date ranges.
- Click "Additional Search Options" for priority, vendor, and employee filters.
- Save your search as a report to quickly run it again later.
- Subscribe to scheduled emails to receive reports automatically.

Who uses Task Search:

- Facility Managers - to check on outstanding items
- Training Managers - to verify team activity
- District Managers - to review what happened at a location on a specific day
- Operations Teams - to monitor workload and completion across properties

Tips:

- Results are sorted in descending order by date
- You can also find open tasks for a specific site by navigating to **Sites** and selecting **Open Tasks** from the site record

Creating a One-Off Task

For anything outside your daily checklist — a unit repair, a vendor task, an ad hoc inspection — you can create a task manually.

How to create a task:

1. Go to **Operation > Task Search**
2. Click **Add New Task**
3. Select the **Task Category** and **Task Item** from the dropdowns — both are required
4. Select the **Site**
5. If the task is unit-specific, select the unit number in the **For** field — leave blank if not unit-specific
6. Assign to an **Employee**, **FSR Group**, or **Vendor** as applicable
7. Fill in any additional details — due date, notes, priority

8. Click **Save & Close**

Add Task [X]

Task Info Upload Files

CATEGORY
Categories... ▼

TASK ITEM *
Select a Task Item... ▼

SITE *
Select a Site... ▼

☐ Unit?

☐ Asset?

PRIORITY *
Priority... ▼

TASK STATUS
New ▼

EXPECTED COMPLETION DATE
mm/dd/yyyy [Calendar Icon]

NEW PROGRESS NOTE
Enter notes... [Text Area]

ASSIGNED EMPLOYEE
Select an Employee... ▼

ASSIGNED FIELD SERVICE REP GROUP
Select a FSR Group... ▼

ASSIGNED VENDOR
Select a vendor... ▼

Save **Cancel**

Note: Task Categories and Task Items must be configured in Settings before they appear in the dropdown. If you don't see what you need contact your StoreTracker administrator.

Task Notifications

When a task is created or updated StoreTracker keeps the right people informed automatically.

Notification Type	How it works
Email Notification	Assigned employee, FSR group, or vendor receives an email when a task is created or updated
Manual Email	Send a real-time update to anyone directly from StoreTracker — no email group required
Scheduled	Set up saved report filters to be emailed automatically on a schedule

Email Groups	Add multiple recipients to a distribution group via Settings > Email Groups — no limit on recipients
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To set up email groups: Navigate to **Settings > Email Groups** — add any team member or external contact. Email groups are useful for notifying multiple people at once without assigning them individually to each task.

Task Reports

Once your team is using StoreTracker consistently your reports become one of the most valuable tools for leadership.

How to access:

- Select **Reports > Task Reports** from the left navigation menu

Available report types:

Report	What it shows
Tasks Reports	Completion status, task type, assigned employee, and date
Asset Reports	Asset condition history, maintenance activity, and open asset tasks
Employee Reports	What each team member completed, when they checked in, and how many tasks they actioned
Scheduled	Saved report templates set to automatically email to your team on a defined schedule

Key features:

- Filter by date range, site, employee, or task type
- Save report templates for recurring use
- Schedule reports to be emailed automatically to your DM or leadership team
- Pin frequently used reports to your dashboard for quick access

I Want to...	Where to go
Complete my daily checklist	Operation > Daily Tasks

Find a specific tasks	Operation > Task Search
Create a new task	Operation > Task Search > Add New Task
See what my team completed	Reports > Task Reports > Field Rep Activity
Setup automated reports email	Reports > Scheduled
Add someone to tasks notifications	Settings > Email Groups

Questions or Issues?

Reach out to your StoreTracker specialist during your onboarding period. After that your long-term support contact is the OpenTech Alliance support team.

Support: support@opentechalliance.com **Phone:** 602.749.9370