

INSOMNIAC StoreTracker™

Units, Field Status, Walkthroughs & Automatic Workflows

Customer Guide Last Updated: June 2026

What is a Walkthrough and Why Does it Matter?

A walkthrough or daily lock check is the process of physically walking your property to verify units are secure, locks are in place, and conditions are documented. Every operator runs this a little differently — some check every unit daily, some focus on units approaching their billing cycle, some do it weekly. The standard varies but the goal is always the same — verify the property is up to standard and catch issues before they become problems.

The challenge with traditional lock checks is that the information stays on paper, in someone's head, or in a separate report that never connects back to the work that needs to happen. StoreTracker solves that by giving your team a digital platform to log what they find in the field — and automatically creating the next steps when something needs attention.

Field Status vs Unit Status - What's the Difference?

Understanding this distinction is key to getting the most out of StoreTracker.

	Unit Status	Field Status
Source	Your PMS	Your team - logged in StoreTracker
What it reflects	Official tenancy — Rented, Vacant, Reserved	Real-time on-site condition observed during a walkthrough
Example	Occupied	Occupied - No Lock
Who updates it	PMS automatically	Your facility manager or team member

Your PMS tells you a unit is occupied. Field Status tells you the lock is missing, the door is damaged, or the unit was recently vacated and needs a clean-out. That real-time detail

lives in StoreTracker and is visible to your entire team including district managers and operations.

Term	What It Means
Field Status	The real-time condition of a unit as observed on-site
Unit Status	The occupancy status reported by your PMS
Field Action	A task automatically created when a Field Status change meets a configured trigger
Field Action Trigger	A rule that defines when a Field Action should fire based on Unit Status, Last Field Status, and New Field Status

Navigating to Units

From the Dashboard select **Operation > Units** from the left navigation menu. Select a facility to pull all units from the Property management system.

The screenshot shows the StoreTracker interface with the 'Units' page selected. The left navigation menu includes Dashboard, Operation, Daily Tasks, Task Search, Sites, Units (selected), Assets, Reports, Task Reports, Unit Reports, Asset Reports, Scan Reports, Employee Reports, Scheduled, Settings, Tasks & actions, Sites & units, Vendors, Team Members, and Sign out. The main content area displays 'Units : Listing 601' with a table of units. The table has columns for Site, Unit ID, Size, Status, Field Status, Tenant, Move In, and Actions. The left sidebar contains filters for Quick Search (Unit ID or Global ID, Tenant name), Sites (1 selected), Unit Statuses (0 selected), and Field Statuses (0 selected). The right sidebar contains 'About Units' and 'Tips'.

Site	Unit ID	Size	Status	Field Status	Tenant	Move In	Actions
Demonstration Facility (8800) -- OpenTech Alliance Inc	100	Self Storage 5.0 X 5.0 CC Inside	Rented	No Lock	Malvina Spencer	04/23/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	101	Self Storage 5.0 X 5.0 CC Inside	Rented	No Lock	Marty McFly	05/19/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	102	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Online Testrentals	02/28/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	103	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Arturo Lopez	01/24/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	104	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Online Testrentals	02/28/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	105	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Bradley Litman	03/03/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	106	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Marty McFly	06/06/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	107	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Marty McFly	07/14/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	108	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Marty McFly	08/29/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	109	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Jorge Becerra	06/12/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	110	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Ernest Gehring	06/26/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	111	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Marty McFly	07/14/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	112	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Marty McFly	07/14/2025	✕
Demonstration Facility (8800) -- OpenTech Alliance Inc	113	Self Storage 5.0 X 5.0 CC Inside	Rented	—	Marty McFly	07/14/2025	✕

The Units Page and Filters - The Units page is built with multiple filter options, so it fits the way your team actually works, not the other way around.

Filter	What it does
Quick Search	Look up a unit by ID, unit number, or tenant name

Sites	Filter to one or more of your properties
Unit Statuses	Filter by PMS status - Rented, Reserved, Vacant
Field Statuses	Filter by on-site condition your team has logged — No Lock, Recently Vacated, etc.
Paid Through Date	Surface units where the tenant's paid through date is on or before a selected date — useful for billing cycle lock checks
Move In Date	Filter by tenant move in date for additional context

Opening a Unit Record

Click the **Unit ID** or unit number to open the unit record. From here you can see everything about that unit in one place:

- Unit size and rate
- Unit Status from your PMS
- Current Field Status
- Current tenant name
- Move in date and paid through date
- Balance and access code
- Full scan history
- Open and completed tasks tied to this unit

All tenant and unit data is pulled directly from your PMS — no double entry required.

Unit Details : OpenTech Alliance Inc : 100

Unit: 100
Size: Self Storage 5.0 X 5.0 CC Inside
Rate: Standard \$24.50 Web \$25.00 Walk In \$0.00
Unit Status: Rented
Field Status: No Lock

Current Tenant: Malvina Spencer
Move In / Paid Through: [04/23/2025] — [04/22/2025] (409 Days Late)
Planned Vacate Date:
Rent / Balance: \$24.50 / \$47.99
Access Code: 16144 (Denied)

Unit Scans (2) | Open Tasks (2) | Completed Tasks | Tenants (1) | Lock Combos | Unit Info View Requests

Listing 2 of 2

Scan Date/Time	Employee	Field Status	Notes	View	Action(s) Taken	Planned Vacate	NS
06/03/2026 -- 9:33:39 AM	Facility Manager	No Lock	Still no lock.				*
06/03/2026 -- 9:33:11 AM	Facility Manager	No Lock	Will call tenant by EOD.				*

+ Add New Scan

Print | Email | Export

About unit scans
View scan history for this unit within a date range.

Tips

- Set the date range and click Search to load scans.
- Check "Field Actions Only" to filter by scans with field actions.
- Click "Add New Scan" to manually add a scan record.
- Units marked with * in the NS column were not physically scanned.

Logging a Field Status Update

When you find something during your walkthrough — a missing lock, a damaged door, a recently vacated unit — log it here.

How to add a scan:

1. Open the unit record
2. Click **Add New Scan**
3. The Unit ID, Unit Status, and Last Field Status are pre-filled
4. Select the **New Field Status** from the dropdown
5. Add a note if anything needs to be documented — for example "Lock missing, unit appears occupied"
6. Click **Save**

The update is logged immediately with your name, a timestamp, and the new field status. Your DM can see this in real time.

The screenshot shows the 'Unit Details' page for 'OpenTech Alliance Inc : 100'. A modal window titled 'Add New Unit Scan' is open in the center. The modal contains the following fields:

- UNIT ID: 100
- SYSTEM STATUS: Rented
- LAST FIELD STATUS: No Lock
- NEW FIELD STATUS: No Lock (dropdown menu)
- NOTES: Enter notes (optional)...

At the bottom of the modal are 'Save' and 'Cancel' buttons. In the background, the unit details page shows a table of scans with columns 'Scan Date/Time', 'Employee', and 'Field Status'. A blue arrow points to the '+ Add New Scan' button at the bottom left of the page.

Mobile app: If your team is using the StoreTracker mobile app field status can also be updated from the field directly. See the StoreTracker Mobile Guide for more information.

Automatic Workflows — Field Action Triggers

This is where StoreTracker saves your team the most time. When a field status change meets a configured trigger condition StoreTracker automatically creates a task so nothing falls through the cracks.

Example — Missing Lock:

Step	What Happens
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Manager walks Unit 101 during lock check	Lock is missing
Manager logs Field Status as No Lock in StoreTracker	Update saved with timestamp and employee name
StoreTracker evaluates configured trigger rules	Trigger condition is met
Tasks are automatically created	Filter by on-site condition your team has logged — No Lock, Recently Vacated, etc.
Paid Through Date	Place Overlock on Rented Unit and Notify Affected Tenant appear as open tasks on the unit
Team completes the tasks	Tasks marked complete — full record of what happened and when

Example — Unit Vacated:

Step	What Happens
Tenant moves out — PMS updated to Vacant	Unit Status changes to Vacant in StoreTracker
Manager confirms lock is removed during lock check	Manager logs Field Status as Recently Vacated
StoreTracker detects the trigger condition is met	A clean-out task is automatically created
Team completes the clean-out	Task marked complete — unit ready for next rental

Field Action Triggers are configured by your StoreTracker administrator in **Settings > Tasks & Actions > Field Action Triggers**. If you need a new trigger added or an existing one adjusted contact your administrator.

Avoiding duplicate tasks: Triggers can be configured to not fire again within a set number of days. This prevents the same task from being created repeatedly if the same field status is logged multiple times in a short window.

Unit Details : OpenTech Alliance Inc : 100

Unit: 100 [Edit Unit Info](#)

Size: Self Storage 5.0 X 5.0 CC Inside

Rate: Standard \$24.50 Web \$25.00 Walk In \$0.00

Unit Status: **Rented**

Field Status: No Lock

Current Tenant: [Malvina Spencer](#)

Move In / Paid Through: [04/23/2025] — [04/22/2025] (409 Days Late)

Planned Vacate Date:

Rent / Balance: \$24.50 / \$47.59

Access Code: 16144 (Denied)

Unit Scans (2) **Open Tasks (2)** Completed Tasks Tenants (1) Lock Combos Unit Info View Requests

Listing 2

Task	Unit Status	Field Status	Priority	Request Date	Request By	Status	Due Date	Assigned	Vendor	Complete	Skip	View	Notes
☐ Place Overlook on Rented Unit	Rented	No Lock		06/03/2026 -- 9:33:40 AM	Facility Manager	New				☒	☐		
☐ Notify affected tenant	Rented	No Lock		06/03/2026 -- 9:33:40 AM	Facility Manager	New				☒	☐		

[+ Add](#) [Select All](#) [Clear All](#) [Print](#) [Email](#) [Export](#)

About open tasks
Open tasks assigned to this unit. Tasks can be completed or skipped directly from the grid.

Tips

- Click the green check to mark a task as complete.
- Click the red X to skip a task (requires a reason).
- Use checkboxes to select tasks, then Print, Email, Export the selection.
- Click "Add" to create a new task for this unit.

Finding and Completing Tasks Generated by Field Status

Once a field action trigger fires the tasks it creates are visible in two places:

On the unit record:

- Open the unit and click the **Open Tasks** tab
- Hit the **checkmark** to quick complete or the **X** to skip — skipping requires a reason
- For a detailed update click the **View image icon** then **Task Details** to add notes, reassign, or update status

In Task Search:

- Go to **Operation > Task Search**
- Filter by site, task item, or status to find tasks across multiple units or properties
- Useful for your DM or training manager to see what is open or completed across the board

Task Details : Place Overlock on Rented Unit

Task Information and Notes

Category : Lock Check

Task Item : Place Overlock on Rented Unit

Site : OpenTech Alliance Inc

Unit : 100

Status : New

Priority : 0 :

Request Date : 06/03/2026 -- 9:33:40 AM

Request By : Facility Manager

Assigned : System

DATE/TIME	BY	PROGRESS NOTES
No notes yet.		

[Edit](#) ☐ Edit Notes [Open Task Details](#) [Print](#) [E-mail](#) [Cancel](#)

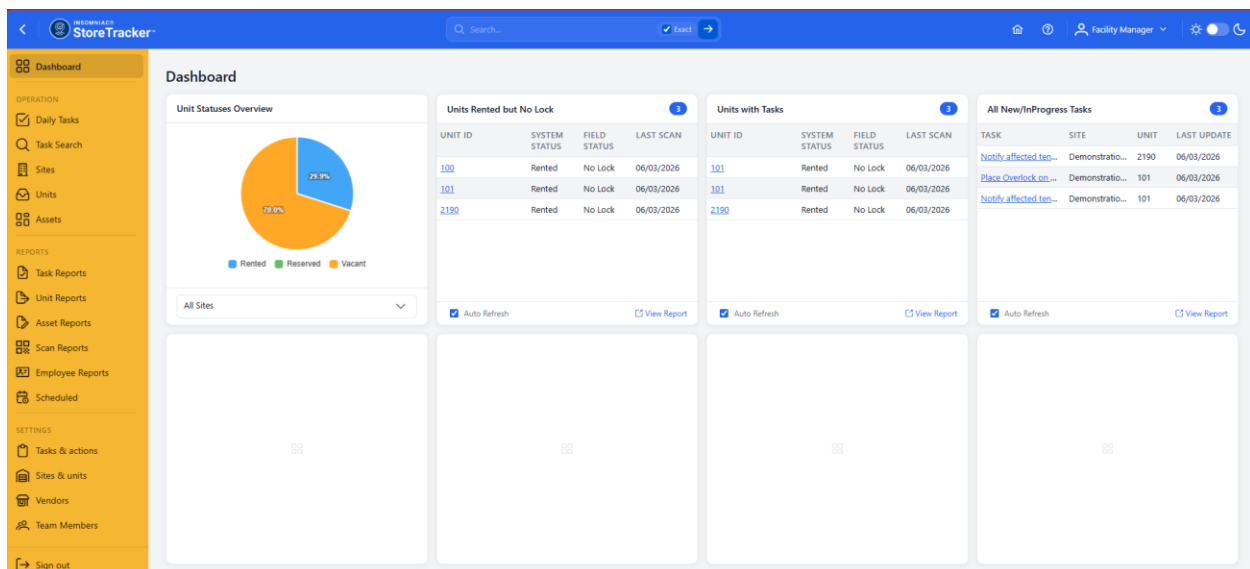
How it All Rolls Up to the Dashboard

Everything your team logs in the field rolls up to the Dashboard automatically. No additional reporting needed.

From the Dashboard you can see:

- Units scanned in the last week with their current field status
- Active tasks across your facility
- Tasks completed in the last 30 days
- Past due tasks that need attention

Your DM and operations team have this same view across all their properties in real time.



I want to...	Where to go
Run my billing cycle lock check	Operation > Units > filter by Paid Through Date
Look up a specific unit	Operation > Units > Quick Search
Log a field status update	Operation > Units > open unit > Add New Scan
See tasks created from a field status	Operation > Units > open unit > Open Tasks tab
Find tasks across multiple units	Operation > Task Search
See field activity on the dashboard	Dashboard > Units Scanned in the Last Week

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