

Welcome to OpenPortal

I want to take a few minutes to introduce you to OpenPortal.

As an OpenTech Alliance customer, OpenPortal gives you the ability to manage all of our products from one central location. It provides you full control over all of your facility content for our INSOMNIAC Live! services. Changing facility hours, entering important custom notes for your facility or even administrative details have never been faster or easier to change and updated.

OpenPortal provides a reporting section for quick access to important statistics for one, or all of your facilities utilizing our INSOMNIAC Live! Call Center, Kiosk or Online services. These various reports will give you a wonderful overview of how our services are assisting your company. Be sure to explore OpenPortal and contact us if you have any questions.

****IMPORTANT****

Once you have successfully logged in and familiarized yourself with OpenPortal, please make sure to visit the sections below to provide us with all the information pertaining to your facility. This is how the call center will know how to interact with your customers.

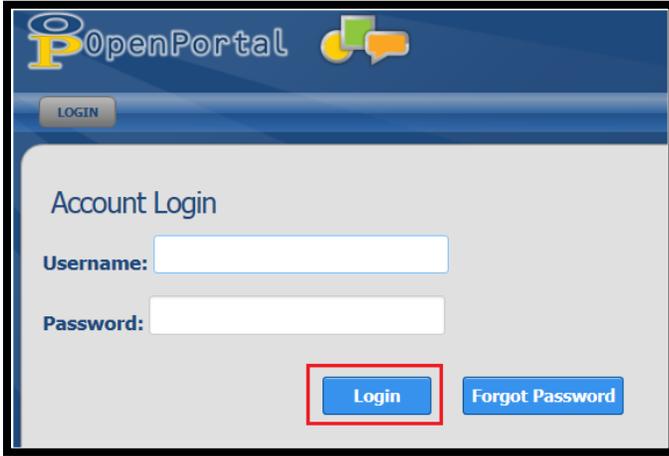
Important Sections:

- Facility Contacts, Discounts & Specials, Holidays & Facility Hours, Late Fees
- General Information – All questions need to be answered.
(These answers are how the call center knows about your facility operations)

Link to OpenPortal: portal.opentechalliance.com

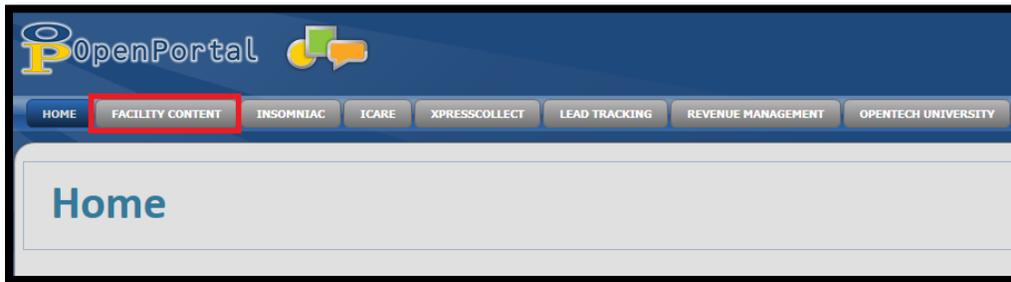
Login:

- a. Input your Username and Password. (Contact OpenTech if you require this)
- b. Click Login.

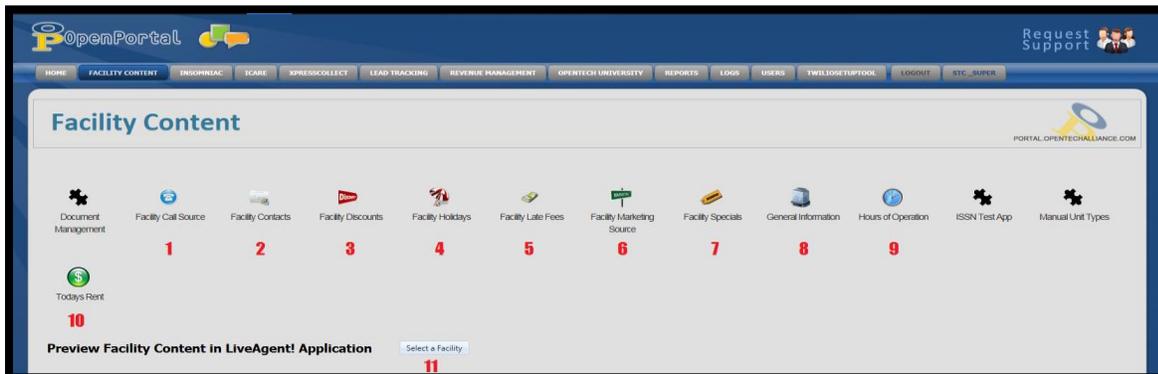


Once you are logged in:

- a. Click on *FACILITY CONTENT*.



- b. This is the area you will be visiting to enter data for you facility.



1. (Optional) Facility Call Source– This area shows you the call sources that have been setup for your facility. i.e. DID's
2. Facility Contacts – In this area you will be entering contacts for your company, after you create them you must assign them to the facilities.
3. Facility Discounts – Here you will be entering the discounts for your facility. For example: 10% Discount for Active Military.
4. Facility Holidays – Here is where you assign holidays to your facilities.
5. Facility Late Fees – Here you will be creating Late Fees for your account, much like contacts, then assigning them to your facilities.
6. (Optional) Facility Marketing Source – In this area you will be adjusting/creating marketing sources. For example: Website or Billboard
7. Facility Specials – If you choose to enter specials manually, this is the areas you do it in. Specials can be created for your account, as with Contacts and Late Fees, and then assigned to your facilities.
8. General Information – This areas is like a survey about facility details, there are about 200 186 questions. Some need to be answered others do not. For example: What are the competitive differentiators for the facility, which set the facility apart from the others?

Section Name	Completed	Awaiting Approval	Unanswered
Facility	95 %	0	1
Presentation	0 %	0	6
Solutions	0 %	0	25
Emergency	50 %	0	3
Tenant Info	10 %	0	18
Vehicle Storage	25 %	0	3
Directions	0 %	0	1
Landmarks	0 %	0	1
Email Confirmation	83 %	0	1
Total MoveIn Cost	0 %	0	2
Custom Facility Notes	20 %	0	20
Kiosk	96 %	0	1
Website	0 %	0	1
Totals		0	83

Quick note/suggestion – Change the number of questions per page to 50 (none of the pages have more than 50 per page), fill all of them out and then click Save All at the bottom of the page.

Select All Unselect All Edit All Save All Needs Answer: All Search

Previous Tab Next Tab

All Facility Presentation Solutions Emergency Tenant Info Vehicle Storage Directions Landmarks Email Confirmation Total MoveIn Cost Custom Facility Notes

Kiosk Website Finish

Page Number: 1 Questions Per Page: 50 [Showing 1 - 23 of 23 Questions]

1. What is the name of your facility?

Characters Remaining: 255

ANSWER NEEDED

Custom Facility Notes:

Select All Deselect All Edit All Save All Approve All Copy Answers Needs Approval Needs Answer All Search

All Facility Presentation Solutions Emergency Tenant Info Vehicle Storage Directions Landmarks Email Confirmation Total MoveIn Cost **Custom Facility Notes** Kiosk

Website Finish

1. **Would you like to display custom notes about the facility?**
Yes APPROVED

2. **Custom Facility Note 1:**
do NOT give customers TMC (total move-in costs).
Office will be closed today at 12pm and reopen regular office on Monday 12/23
Characters Remaining: 118 APPROVED

3. **Would you like to display a second custom note about the facility?**
No APPROVED

9. Hours of Operation – In this area you will enter the hours of operation. For example: Office Hours and Access Hours.

Custom Message

Start Date: 2/14/2020 7:00 AM Use this custom message to alert the storage counselors of a temporary closure for a specific date range.

End Date: 2/15/2020 1:00 AM

Message to Display: **2/14/2020-Office is closed today and will reopen normal business hour on Saturday**

Clear Save

Edit All Save All Copy Answers to Other Facilities

Office Hours

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
: : AM						
: : AM						
<input type="checkbox"/> Closed						
<input type="checkbox"/> Apt. Only						

Lunch Hours

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
: : AM						
: : AM						
<input type="checkbox"/> None						

Gate Hours

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
: : AM						
: : AM						
<input type="checkbox"/> Closed						
<input type="checkbox"/> 24 Hours						

10. (Optional) Today's Rent – In this area you can manually enter special rates for your units. For example: 10 X 10, Regular Price = \$100, Special Rate = \$95.
11. Preview Facility Content in LiveAgent! Application – You can use this feature to see the data that you have entered into OpenPortal the way that the storage counselors see it when they take calls.

For the Contacts, Late fees, and specials – You will need to create the “record” and then assign it to the facility as shown below

Your Account: RP Clark Group

Contacts

- New Contact
- Randy Clark

First Name: Last Name:

Home/Business Phone: Cell Phone:

Email: Gender:

Job Title:

Notify contact during a call center service interruption:

[Delete](#) [Save](#) [Assign Contacts](#)

Selected Facility: Pleasant Garden Road [Change Facility](#)

Select a Contact:

[Add New Contact](#) [Remove Contact](#) [Assign Contact](#)

Job	Name	Gender	Home/Business Phone	CellPhone	Email	
<input checked="" type="checkbox"/> District Manager	Randy Clark	Male	3367637860		pgrselfstorage@gmail.com	<input checked="" type="checkbox"/>
<input type="checkbox"/> Manager	Randy Clark	Male	3367637860		pgrselfstorage@gmail.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Assistant Manager						<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> First Emergency Contact	Randy Clark	Male	3367637860		pgrselfstorage@gmail.com	<input checked="" type="checkbox"/>
<input type="checkbox"/> Second Emergency Contact						<input checked="" type="checkbox"/>
<input type="checkbox"/> Third Emergency Contact						<input checked="" type="checkbox"/>
<input type="checkbox"/> Fourth Emergency Contact						<input checked="" type="checkbox"/>
<input type="checkbox"/> Fifth Emergency Contact						<input checked="" type="checkbox"/>

[Remove Contact](#) [Assign Contact](#)

In the “General information” section, please fill out each section:

Selected Facility: Pleasant Garden Road [Change Facility](#)

[Continue](#)

Section Name	Completed	Awaiting Approval	Unanswered
Facility	6 %	0	15
Presentation	0 %	0	6
Solutions	0 %	0	25
Emergency	0 %	0	5
Tenant Info	0 %	0	20
Vehicle Storage	0 %	0	4
Directions	0 %	0	1
Landmarks	0 %	0	1
Email Confirmation	50 %	0	3
Total MoveIn Cost	0 %	0	2
Custom Facility Notes	0 %	0	22
Kiosk	0 %	0	24
Website	0 %	0	1
Totals		0	129

[Continue](#)