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SOFTWARE

TSSA Forms Online User Manual

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Getting Started

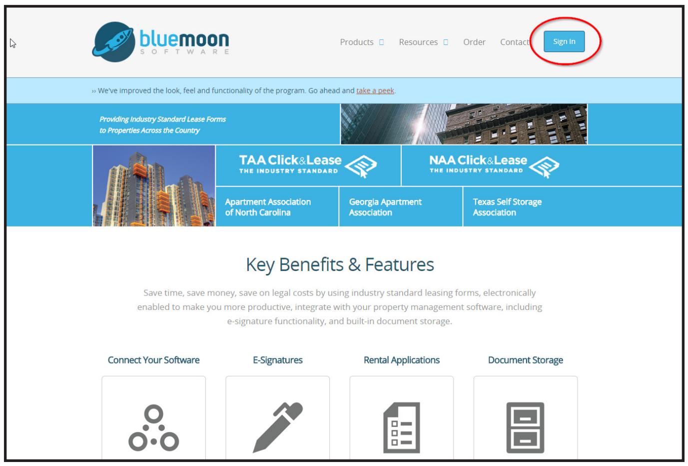
Logging Into TSSA Forms Online

All transactions made using TSSA Forms Online are protected by SSL encryption. In order to access your account, you must first log in using your License (Serial) Number, User ID, and password.

Follow these steps to log into TSSA Forms Online:

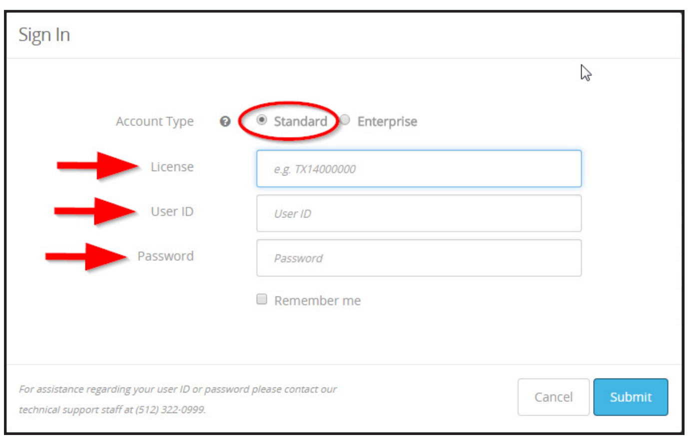
1. Open your web browser and enter the following address into the address bar: **www.bluemoonforms.com**.

2. On the homepage, click on the ***Sign In*** button.



3. Enter your License (Serial) Number, User ID, and password. For Account Type, verify that ***Standard*** is selected.

4. Once you have entered your login information, click the ***Submit*** button.



NOTE:
If the login information entered is not valid, the program will display the message:
The combination of License #, User ID, and password entered does not match our records.

5. If you are logging in for the first time, you will be required to accept a License Agreement before you can use TSSA Forms Online. If you do not accept the license agreement, you will not be allowed to continue. You may also be prompted to complete the Setup Wizard.

The Setup Wizard

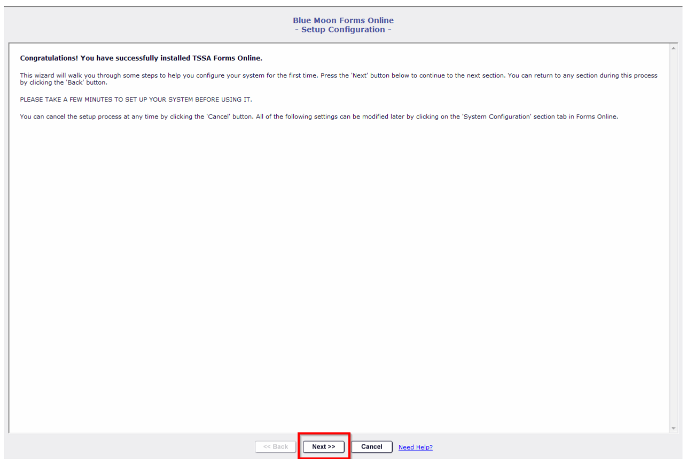
The first time you log in, the Setup Wizard will guide you through the process of configuring some settings for TSSA Forms Online. The Setup Wizard can be navigated by using the buttons located at the bottom of the screen.

Upon entering the wizard, simply click the ***Next*** button to begin entering configuration settings. If you do not wish to enter any settings at this time, click the ***Cancel*** button to exit the Setup Wizard.

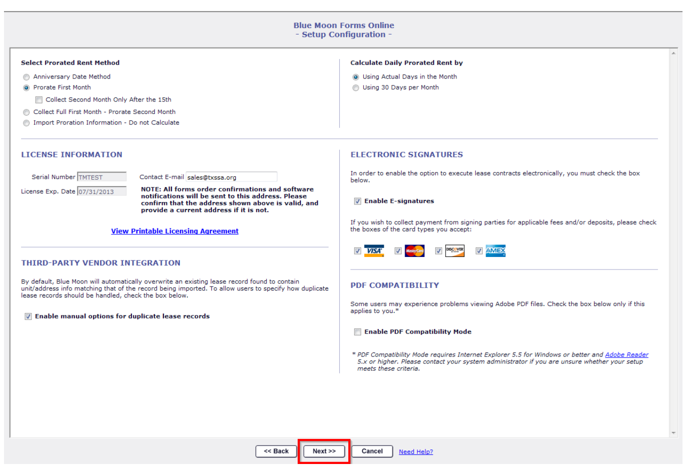
> ***NOTE:***
> All of the settings options contained in the Setup Wizard can be accessed at any time in the Settings portion of TSSA Forms Online.

Follow these steps to complete the Setup Wizard:

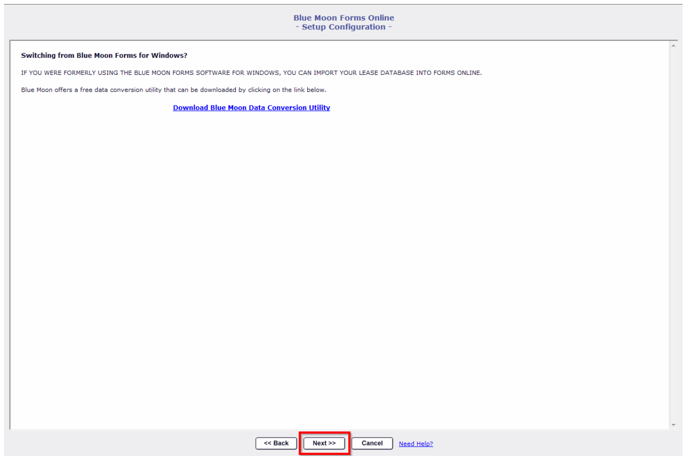
1. Read through the information on the first screen of the wizard, and then click the ***Next*** button.



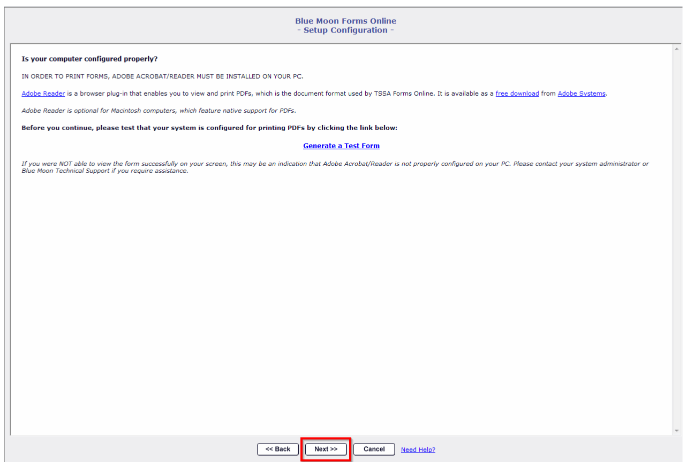
2. You will enter the Setup Configuration screen next. Make your selections for each setting and click the ***Next*** button.



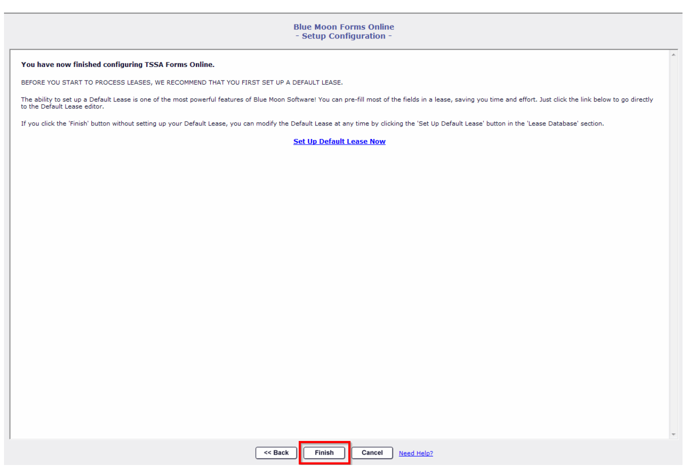
3. If you are a former TSSA Forms for Windows customer, and you have data that needs to be imported to TSSA Forms Online, click on the ***Download Blue Moon Data Conversion Utility*** link to run the conversion tool. Then, click the ***Next*** button.



4. In order to generate lease documents using TSSA Forms Online, you must have Adobe Acrobat installed. To ensure your system is configured to print PDF files, click on the ***Generate a Test Form*** link. Then, click the ***Next*** button.



5. You are now finished with the Setup Wizard. It is recommended you setup your default lease at this time. Click on the ***Setup Default Lease Now*** link, or click on the ***Finish*** button to setup the default lease at a later time.

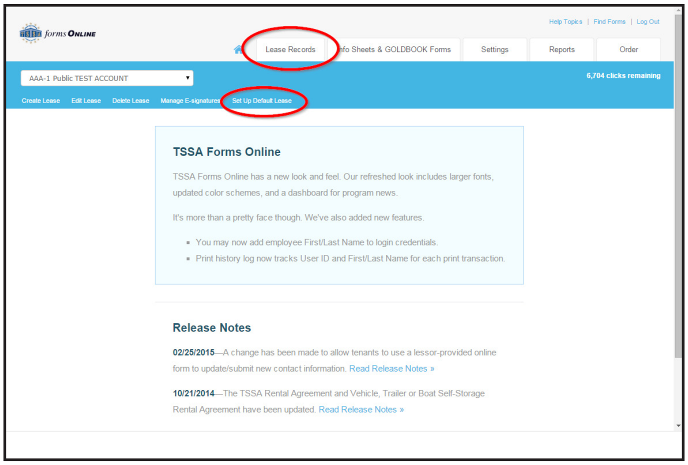


Setting Up the Default Lease

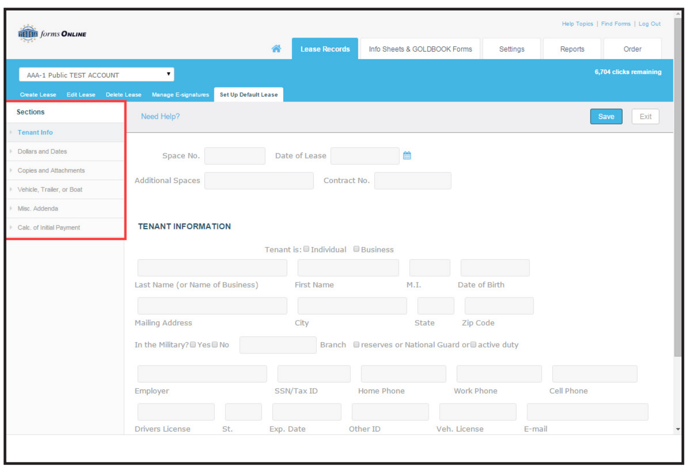
Before creating lease records, most users will want to set up a default lease, which can be used as a model to complete actual lease contracts. Setting up your default lease allows you to automatically fill in much of the lease including late fees, charges, reletting charges, etc.

Follow these steps to setup your default lease:

1. Once logged into TSSA Forms Online, click the ***Lease Records*** tab, then click on ***Setup Default Lease***.



2. The sections listed on the left side of the screen correspond to the various sections of the lease contract, including Tenant Info, Dollars and Dates, etc.



- Tenant Info – tenant's personal information
- Dollars and Dates – applicable fees and charges
- Copies and Attachments – special provisions and various attachments to be included
- Vehicle, Trailer, or Boat – vehicle, trailer, or boat information to be included
- Misc. Addenda – information for addenda and special instructions
- Calc. of Initial Payment – calculator for assessing initial payment due

NOTE:

Some fields are disabled because the information contained in these fields will typically be different for each lease. For example, you cannot enter any tenant information on the default lease, since this information would change for each tenant.

3. Click on each section of the lease and fill in each field with the appropriate information according to your facility's normal operating procedures.

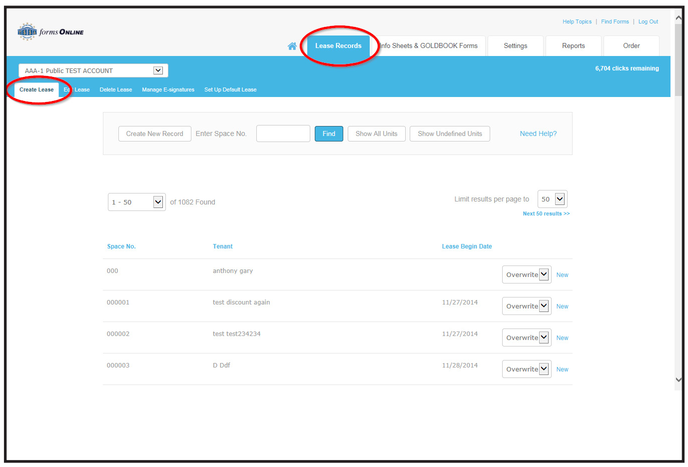
4. As you complete each section, click the ***Save*** button in the upper right corner of the screen. If you click the ***Exit*** button you will be prompted to save before exiting.

Working with Lease Documents

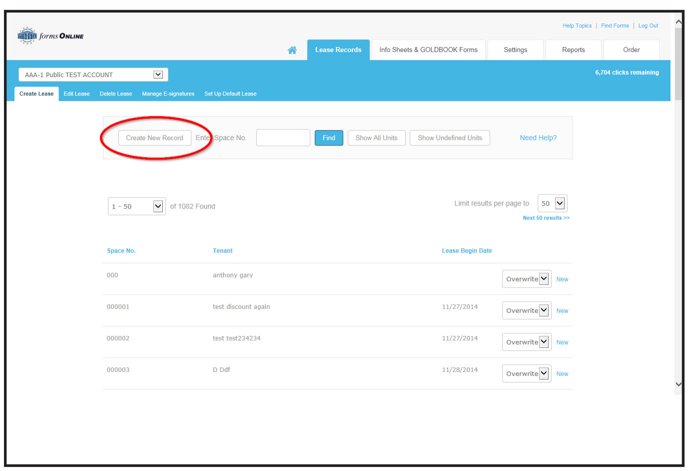
Creating a New Lease

Follow these steps to create a new lease:

1. With the ***Lease Records*** tab selected, click on ***Create Lease*** on the left side of the screen.



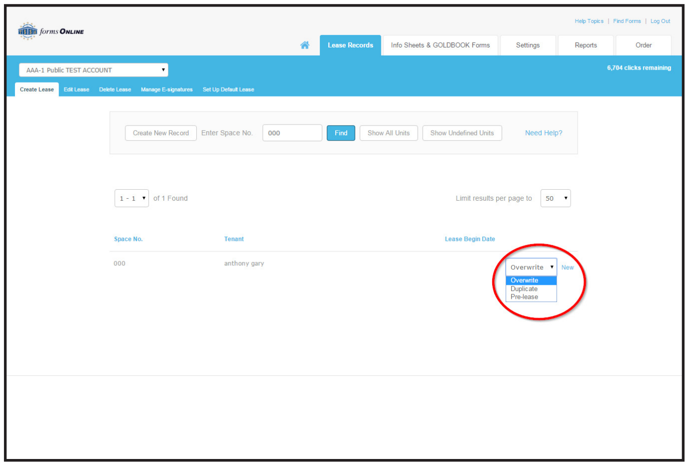
2. If the unit you are leasing has not been leased before you may click the ***Create New Record*** button and skip to step 5,



OR to determine if the unit you are leasing has a previous lease record, follow these steps:

- Enter the space number in the Enter Space No. field, then click the ***Find*** button to view previous lease records for this unit, OR
- Click the ***Show All*** button to view a list of all currently leased spaces, OR
- Click the ***Show Undefined Units*** to view a list of lease records where a space number has not been defined

3. If there is an existing lease record you have the following options:

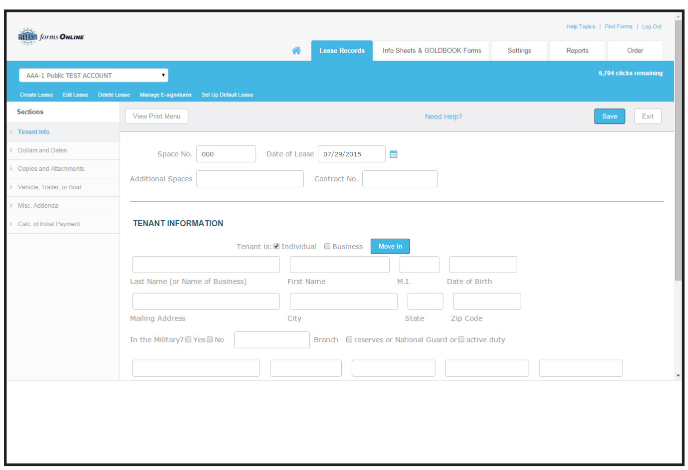


- ***Overwrite*** – you will overwrite the existing lease record with the new lease record
- ***Duplicate*** – you may create a new lease record for a unit without overwriting a previous lease record for that unit
- ***Pre-Lease*** – you will pre-lease a unit for which there is an existing lease record

NOTE:
There must be an existing lease record in order to create a pre-lease for a unit.

4. Select one of the options from Step 3, and click on ***New***. You will now enter the lease editor.

5. Complete each section of the lease and click the ***Save*** button in the upper right corner of the screen.



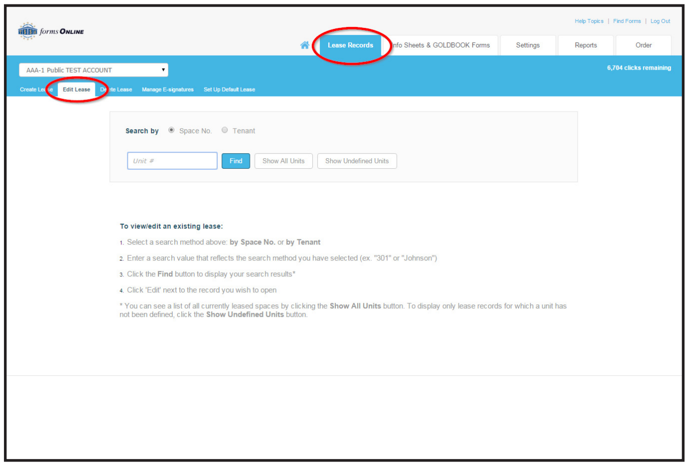
6. To view the Print Menu, click the ***View Print Menu*** button.

7. To exit the lease editor, click the ***Exit*** button.

Editing an Existing Lease

Follow these steps to edit an existing lease:

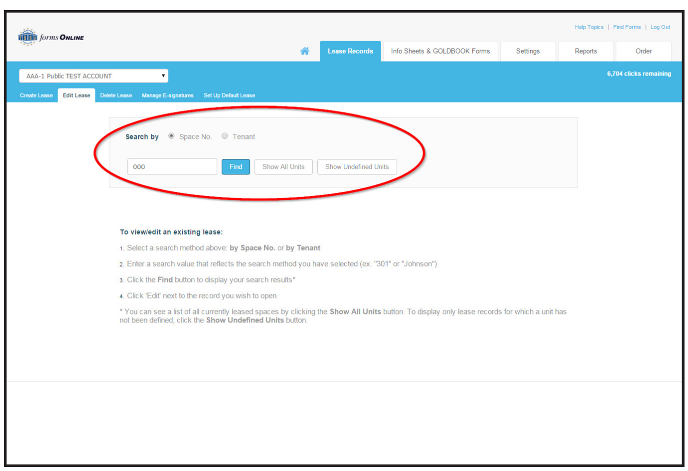
1. With the ***Lease Records*** tab selected, click on ***Edit Lease*** on the left side of the screen.



2. You may search for a lease record by the Space No. or Tenant. Select which option you prefer.

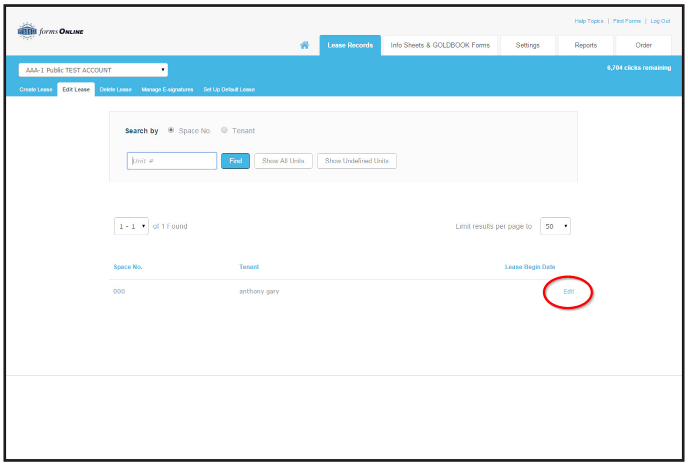
3. Enter either the space number or tenant's name in the Search by field, then click the ***Find*** button.

NOTE:
You may also use the ***Show All Units*** button to view the existing records for all units, or you may use the ***Show Undefined Units*** button to view the existing lease records where the unit is not defined.

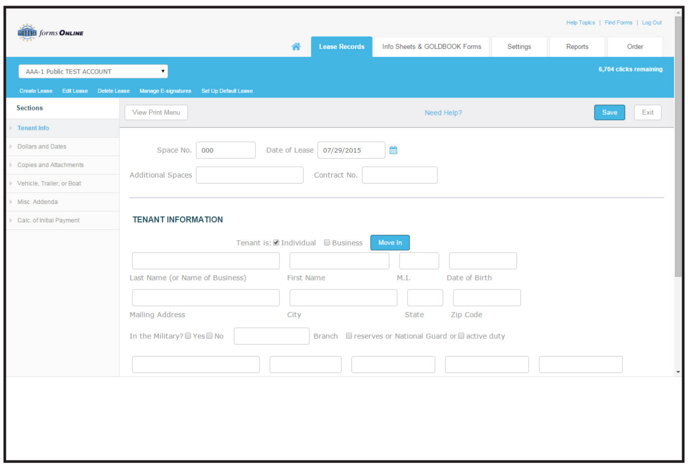


4. A list of lease records matching your search criteria will appear. By default, the amount of lease records that will display on each page is 50. If you would like to view more than 50 lease records per page, you can increase the amount by using the drop-down menu to the upper right of the results list.

5. Look for the lease record you want to edit, and click the ***Edit*** link to the right of the record.



6. Once you click the ***Edit*** link, you will enter the lease editor.



7. Click on each section of the lease along the left side of the screen and edit the tenant's information as needed.

8. As you complete each section, click the ***Save*** button in the upper right corner of the screen.

9. To view the Print Menu, click the ***View Print Menu*** button.

10. To exit the lease editor, click the ***Exit*** button.

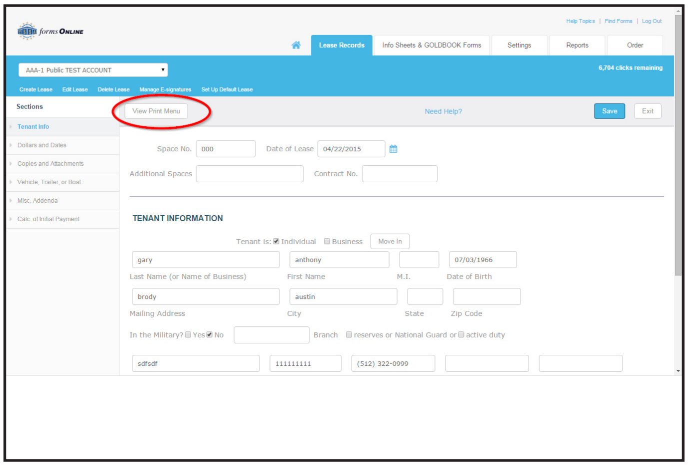
Printing a Lease

TSSA Forms Online allows you two options when attempting to print a lease: Preview or Print.

- The ***Preview*** button will generate a PDF file of the lease forms you have selected to print. The forms will have "Sample" stamped across them. Previewing the forms allows you to review the lease for any typos or errors. When you click the ***Preview*** button, you ARE NOT charged clicks.
- The ***Print Selected Forms*** button will generate a PDF file of the lease forms you have selected to print. The forms will NOT have "Sample" stamped across them since these are now considered the executed lease forms. When you click the ***Print Selected Forms*** button, you ARE charged clicks.

Follow these steps to print a lease package:

1. Once you have created a new lease record, or edited an existing lease record and saved your changes, click the ***View Print Menu*** button.



2. The Print Menu will appear. Check the box next to each form you would like to print.

NOTE:

Some forms may be disabled if the "Request ESignature?" option is checked. Uncheck this box and all forms should become available to print.

3. Click the ***Preview*** button to generate a sample PDF file. You will not be charged any clicks to preview the forms. Review the forms for any typos or errors.

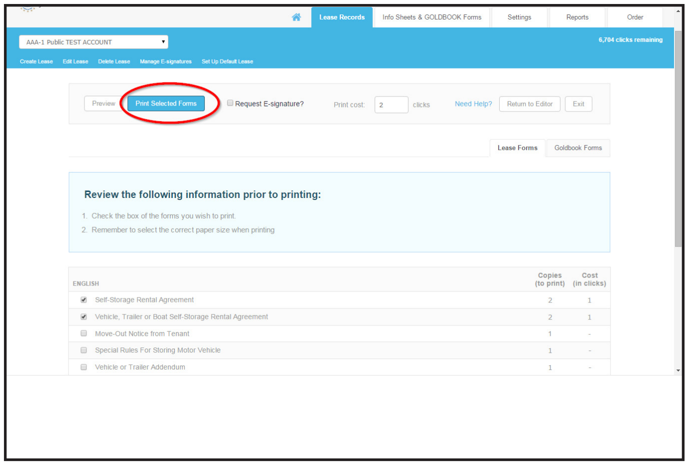
4. The cost to generate each form is listed on the right side of the screen in the ***Cost in Clicks*** column. The total clicks cost of your rental agreement appears in the ***Print Cost*** field.

NOTE:

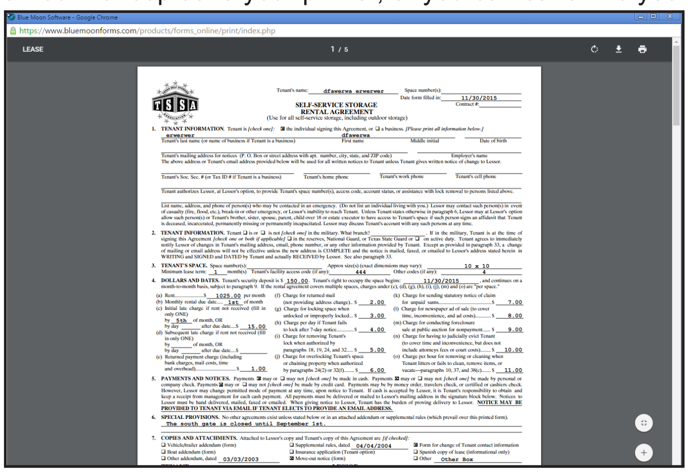
It is important to understand the information in the "Copies (to print)" column. This is the number of copies recommended you print. But, you still have to manually send this number of copies to your printer when you are printing the lease forms package.

For example, it's recommended you print two copies of the Self-Storage Rental Agreement. So, in the "Copies (to print)" column you will see "2". If you look at the "Cost (in clicks)" column, you will only be charged one click. When you generate the PDF file of the lease forms package and send it your printer, two copies will not automatically print out. You need to remember to change the number of copies to print to "2" when sending the file to your printer.

5. When you are ready to generate the final rental agreement, click the ***Print Selected Forms*** button.



6. A PDF file of your rental agreement will be generated. You can print the agreement by sending the appropriate amount of copies to your printer, or you can save it to your hard drive.



7. The print cost will be deducted from your clicks counter in the upper right corner of the screen.

About Pre-leases

What is a Pre-lease?

The Pre-lease feature allows you to lease an existing space before the term of the current lease expires. In effect, the database will maintain two lease records for the same space until the pre-lease replaces the current active lease.

Distinguishing Pre-leases from Active Leases

When viewing search results, “Pre-lease” will appear in red below the space number of any pre-lease records. When a pre-lease record is opened in the Lease Editor, “Pre-lease” will appear in red above the space number.

How do Pre-Leases work?

When you create a pre-lease, that record will be maintained in the database along with the active lease until the beginning lease date specified in the pre-lease. Once the beginning lease date of the pre-lease has been reached, you will be prompted to replace the expired lease record with the pre-lease the next time you attempt to edit the pre-lease.

You do not have to replace the original lease with the pre-lease when prompted to do so. However, you will be prompted every subsequent time you try to access the pre-lease in the TSSA Forms Online program. If you choose to replace the current lease, the pre-lease record will become the active lease, permanently deleting the expired lease it replaces from the database.

You also have the option to activate a pre-lease before its beginning lease date by clicking Activate next to the pre-lease record displayed in the search results screen. Activating a pre-lease replaces the current active lease with the pre-lease record.

> ***NOTE:***
> The “Activate” feature is only available for lease records returned during a search using the Edit Lease or Create Lease features.

Pre-lease Restrictions

You CAN’T...

- create a pre-lease for a record which has already been pre-leased
- pre-lease a pre-lease
- renew a pre-lease or any lease record that has been pre-leased

You CAN...

- create a pre-lease for a record which has not been pre-leased
- edit a pre-lease in the Lease Editor after it has been created
- edit an active lease in the Lease Editor without affecting its associated pre-lease
- activate a pre-lease before before the beginning date specified in the pre-lease

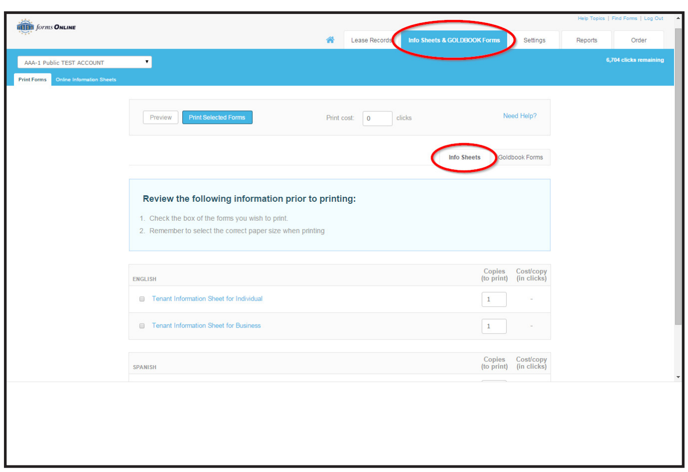
Info Sheets & Goldbook Forms

Tenant Information Sheets

TSSA Forms Online includes access to the Tenant Information Sheet.

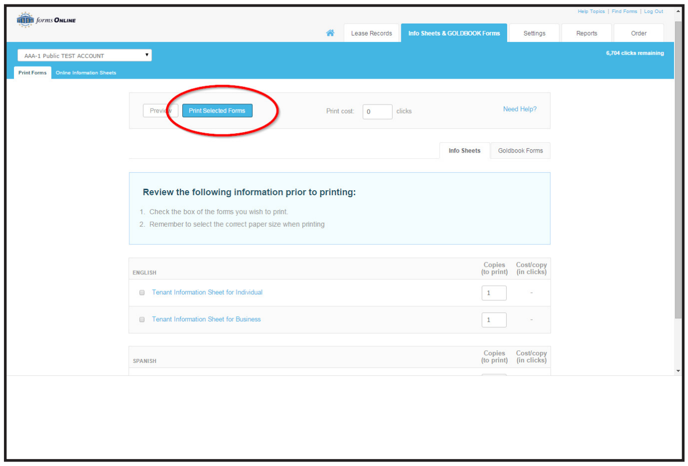
Follow these steps to print the Tenant Information Sheet:

1. When logged into TSSA Forms Online, click the ***Info Sheets & GOLDBOOK Forms*** tab. Then click on ***Info Sheets***.



2. Check the box next to each information sheet you would like to print.

3. Click the ***Print Selected Forms*** button. A PDF file of the form(s) will be generated.



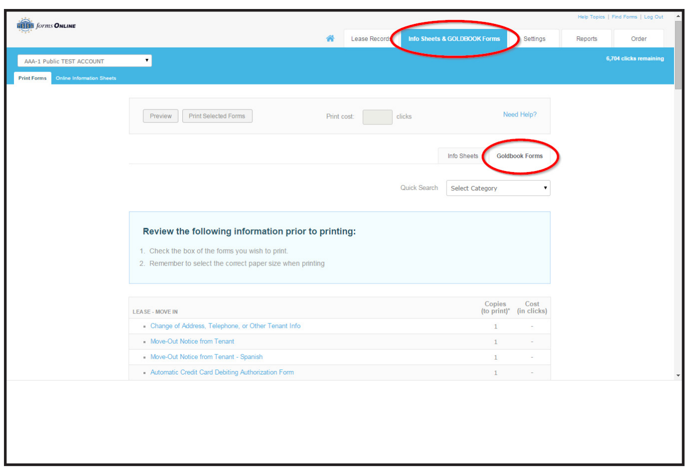
4. Send the file to your printer, and have the tenant fill out the form manually.

GOLDBOOK Forms

TSSA Forms Online provides access to various TSSA GOLDBOOK Forms available to print at no cost.

Follow these steps to print GOLDBOOK Forms:

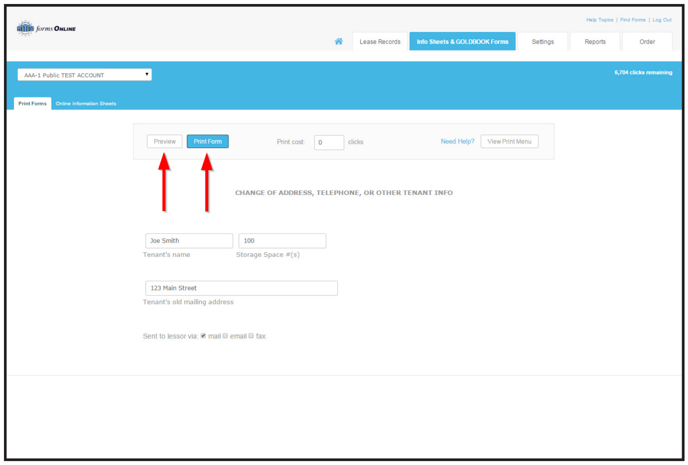
1. When logged into TSSA Forms Online, click the ***Info Sheets & GOLDBOOK Forms*** tab. Then click on ***GOLDBOOK Forms***.



2. The forms will be divided into categories. Click on the form you would like to generate.

3. The form you've selected will load on the next screen. Complete the fields with the appropriate information.

4. To preview the completed form, click the ***Preview*** button. If you are ready to print the form, click the ***Print*** button.



5. You can print the executed form by sending the appropriate amount of copies to your printer, or you can save the form to your hard drive.

6. To return to the list of GOLDBOOK Forms, click the ***View Print Menu*** button.

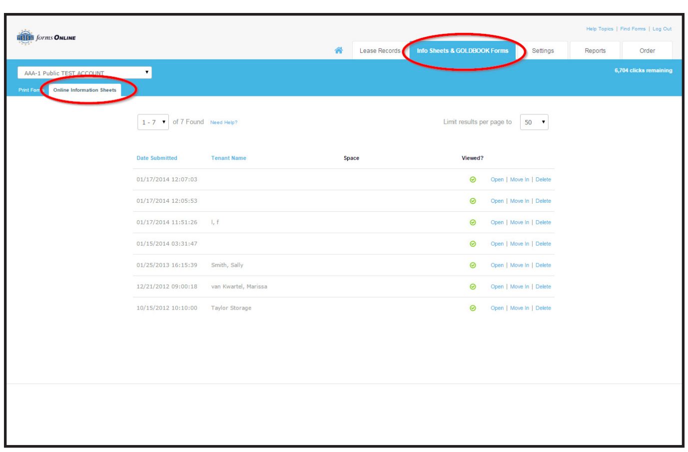
NOTE:
You may also print GOLDBOOK Forms when working with a lease record by clicking the ***View Print Menu*** button and clicking the ***GOLDBOOK Forms*** tab. When printing GOLDBOOK Forms from within a lease record, the forms will populate with the relevant tenant information. When printing GOLDBOOK Forms using the method above, the forms print out blank and must be completed manually.

Online Tenant Information Sheets

A link to the Online Tenant Information Sheet may be placed on your facility's website so prospective tenant's may apply online. When a tenant has completed an Online Tenant Info Sheet, an email notification will be send to your facility.

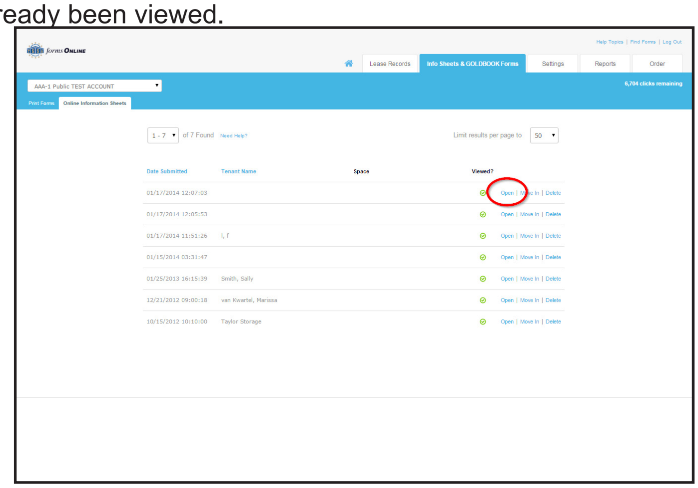
You can then manage the online tenant information sheets you've received when logged into TSSA Forms Online. You may review and print the info sheets, or actually move the tenant in upon approval.

Follow these steps to manage your Online Tenant Information Sheets:



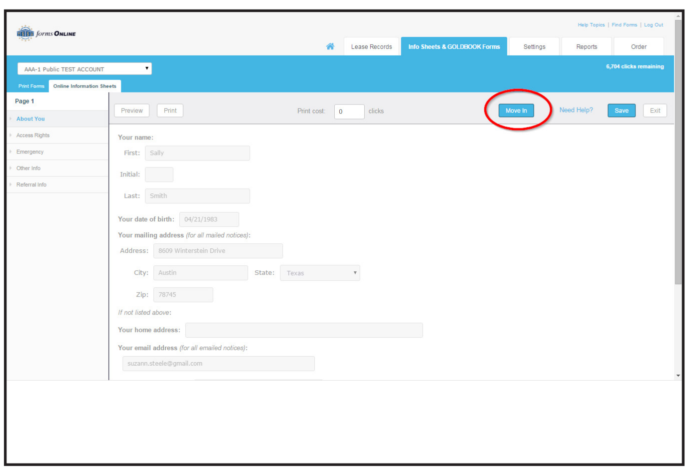
1. When logged into TSSA Forms Online, click the ***Info Sheets & Goldbook Forms*** tab. Then click on ***Online Information Sheets***.

2. The next screen allows you to view the online Tenant Information Sheets you have received. The following information can be viewed:
    - The date and time the tenant info sheet was submitted online
    - The tenant's name
    - A green checkmark will appear in the Viewed? column, if the info sheet has already been viewed.



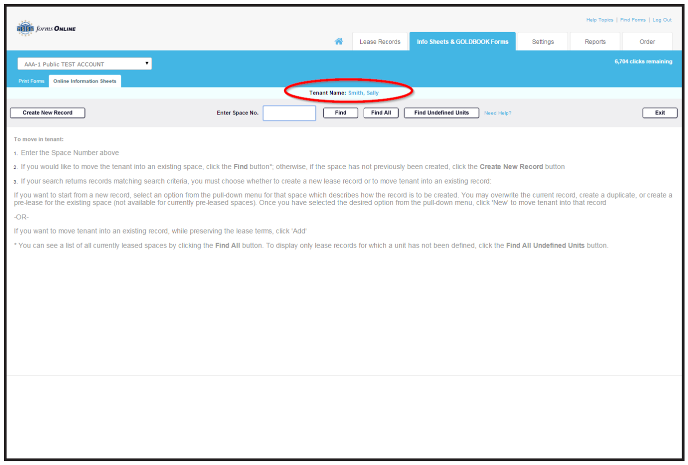
3. To open and view an information sheet, click the ***Open*** link next to the name of the appropriate tenant.

4. The info sheet will open. Click the ***Preview*** button to preview the completed info sheet. If you'd like to print the info sheet, click the ***Print*** button.



5. If you'd like to move the tenant into a space, click the ***Move In*** button. You'll have the option to include the information sheet with the rental agreement when you get to the Print Menu.

6. The Create Lease screen will appear. You may now create a new lease record for the selected tenant.



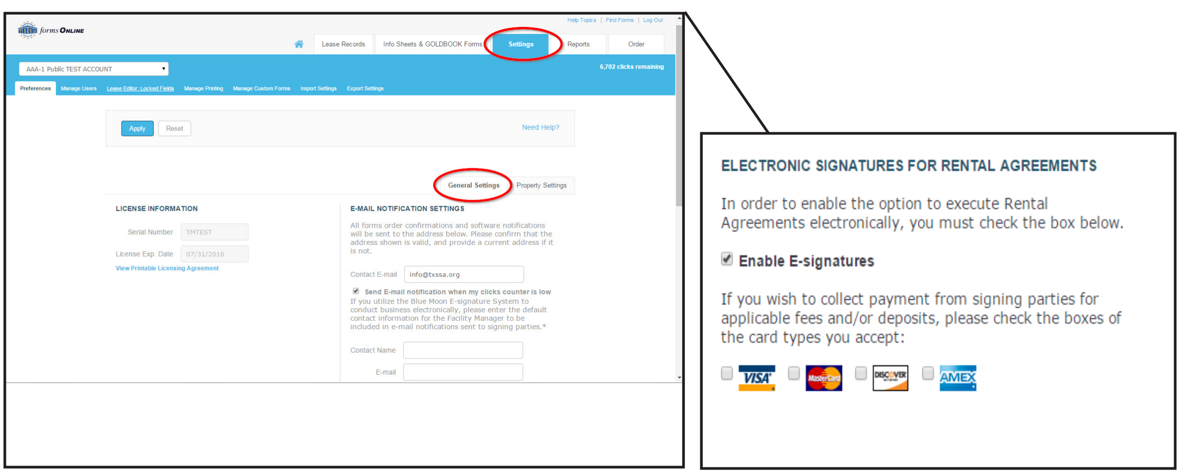
Electronic Signatures

Enabling the eSignature Feature

TSSA Forms Online provides the eSignature feature free of charge. eSignature allows you to email the rental agreement to the tenant, who is then able to electronically sign the agreement. Once a lease has been signed electronically, you will be able to retrieve the signed agreement online.

Follow these steps to enable the eSignature feature:

1. When logged into TSSA Forms Online, click the ***Settings*** tab.
2. Make sure you're viewing the General Settings and scroll down until you see the ***Electronic Signatures for Rental Agreements*** section. Check the box next to ***Enable eSignatures***.



3. If your facility accepts credit card payments for any applicable fees, select which credit cards are accepted by checking the box next to each type.

NOTE:
Blue Moon Software does NOT process any payment information. The credit card information will simply be collected, but your facility will need to process the payment according to your normal payment processing procedures.

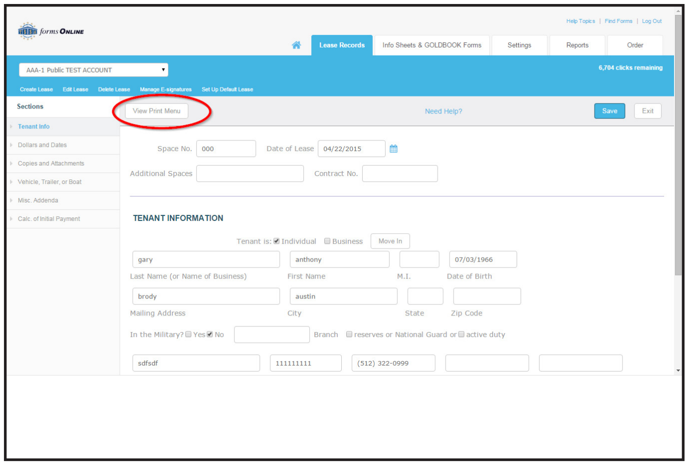
4. Scroll up to the top of the screen and click the ***Apply*** button to save your changes.

Requesting eSignature

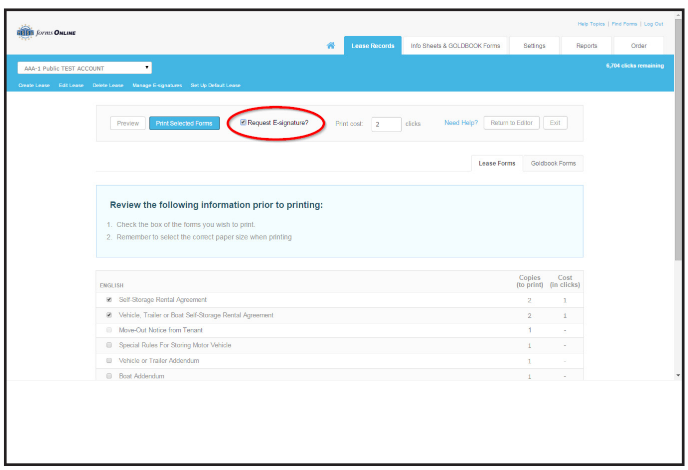
Once the eSignature feature has been enabled, you can collect signatures from tenants via email.

Follow these steps to request an eSignature for a rental agreement:

1. Once you have created a new lease record, or edited an existing lease record and saved your changes, click the ***View Print Menu*** button.



2. On the Print Menu screen, make sure the ***Request eSignature?*** box is checked.

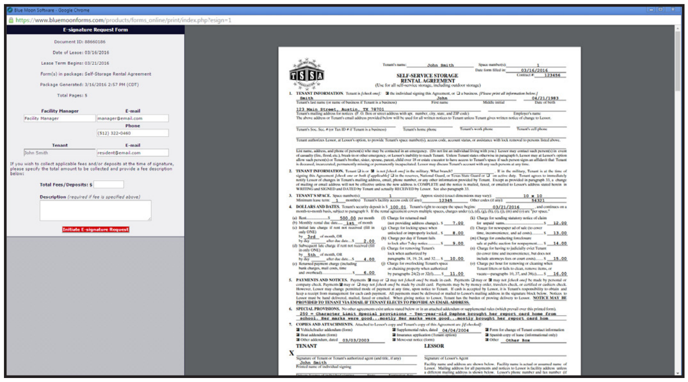


3. Select the forms you want to include with the rental agreement by checking the box next to each form.

NOTE:
Some forms may become disabled when the ***Request eSignature?*** box is checked. These forms require additional information from the tenant, so ESignature cannot be requested for these forms.

4. To preview the rental agreement, click the ***Preview*** button. If you are ready to print the rental agreement, click the ***Print Selected Forms*** button.

5. A PDF file of the rental agreement will be generated along with the eSignature Request Form. Complete the following information to initiate the ESignature request.



- Name of the Facility Manager
- Email Address of the Facility/Facility Manager
- Facility Phone Number
- Tenant's Email Address
- Any applicable fees or deposits you will be collecting
- Description of any fees/deposits you will be collecting

6. Once all the required fields have been completed, click the ***Initiate eSignature Request*** button.

7. You will receive a message stating the eSignature request has been initiated.

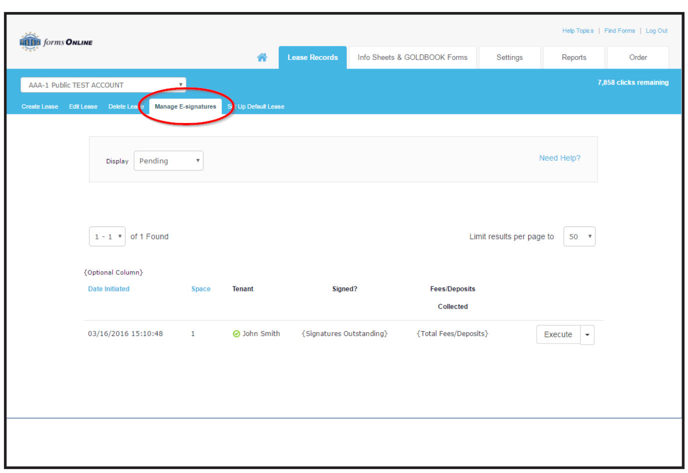
8. The tenant will be notified via email that you have requested they sign the documents via eSignature. Once the tenant has signed the documents electronically you will receive notification via email.

Managing eSignature Requests

Once you have been notified that a tenant has signed the rental agreement via eSignature, you can retrieve the signed documents online.

Follow these steps to manage eSignature requests:

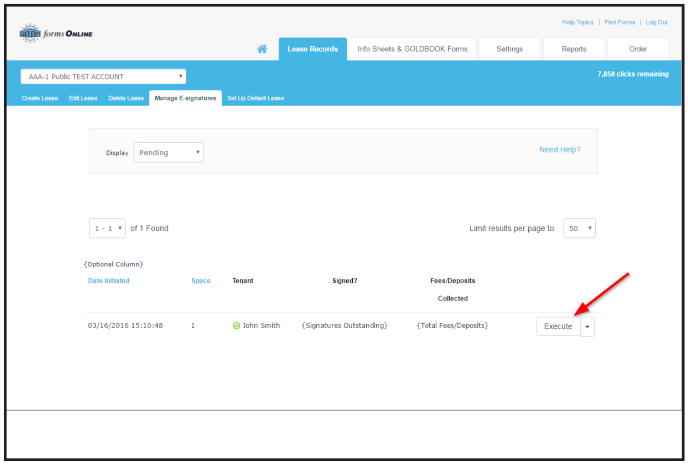
1. When logged into TSSA Forms Online, click the ***Lease Records*** tab, and then click on ***Manage eSignatures***.



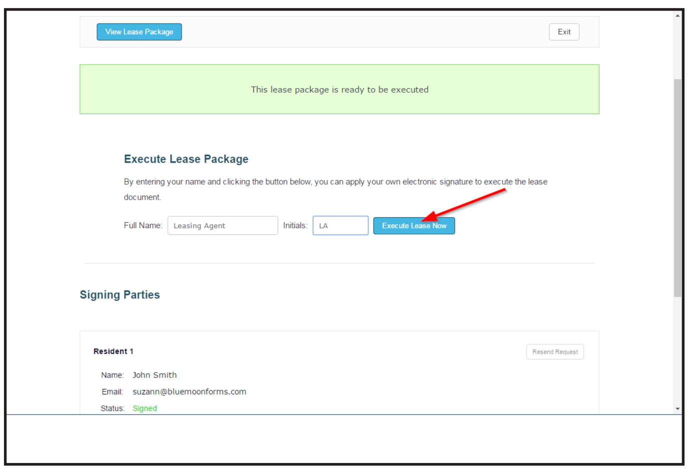
2. The Manage eSignatures screen will display any pending eSignatures. To view all eSignatures, select ***Entire History*** in the ***Display*** drop-down menu.

3. If the tenant has signed the rental agreement, a green checkmark will appear next to their name.

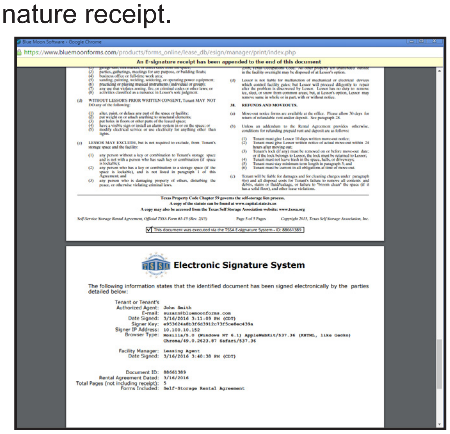
4. Click ***Execute*** to the right of the eSignature you wish to execute.



5. The following screen will display the signing parties of the agreement and the date and time the agreement was signed electronically. To apply your signature and execute the agreement, enter your name and initials in the fields indicated. Then click ***Execute Lease Now***.



6. Click the ***View Lease Package*** button to generate a PDF file of the executed forms. The last page will include the eSignature receipt.



7. You can print the executed agreement by sending the appropriate amount of copies to your printer, or you can save the agreement to your hard drive.

8. To exit the Manage eSignatures screen, click the ***Exit*** button in the upper right corner of the screen.

Important Information Regarding eSignature

Rental Agreements generated for eSignature are active for 30-day period from the time the documents are generated, but can only be signed by the tenant up until the start-date of the agreement.

For example, if an agreement is generated for eSignature on March 15, 2015, the documents will remain active in the program until April 15, 2015. If the agreement has a start date of April 1, 2015, the tenants only have until April 1 to sign the agreement. After April 1, if the agreement hasn't been signed, it is no longer active and a new agreement must be created for the tenant.

Pending documents can be viewed by the facility and tenant(s) as needed during this 30-day active period, after that they are permanently deleted from the Blue Moon server. Blue Moon advises all parties to print and/or save a copy of the documents prior to its expiration.

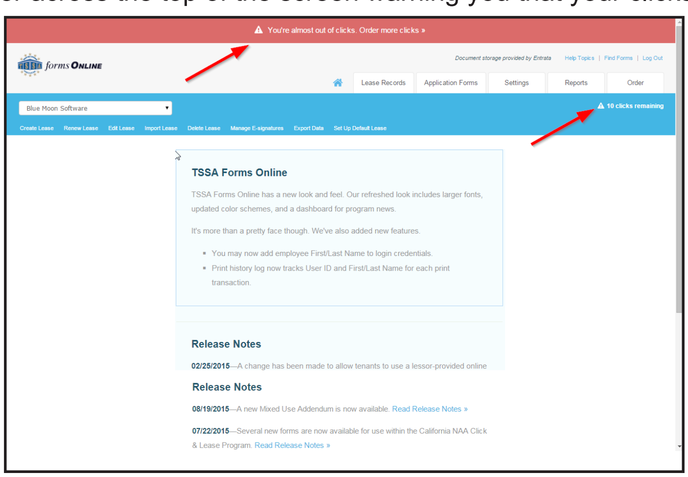
Please be sure that the contents of the rental agreement are complete and accurate prior to submitting for eSignature. If you need to change the contents of a rental agreement after it has been sent out for eSignature (but before it has been signed/executed), you should first delete the record from the Manage eSignatures section. Then you can modify the original lease record in the lease editor and request an eSignature again.

Once a rental agreement has been signed, the signatures collected are stored on a permanent basis (unless deleted by the user) in the program. If still within the 30-day active period, the entire agreement can be viewed. After the 30-day active period, only the eSignature receipt can be viewed.

Ordering Clicks

The number of clicks remaining on your counter is always viewable in the top right corner of your screen. It is important to remain aware of the amount remaining to avoid running out and disrupting service.

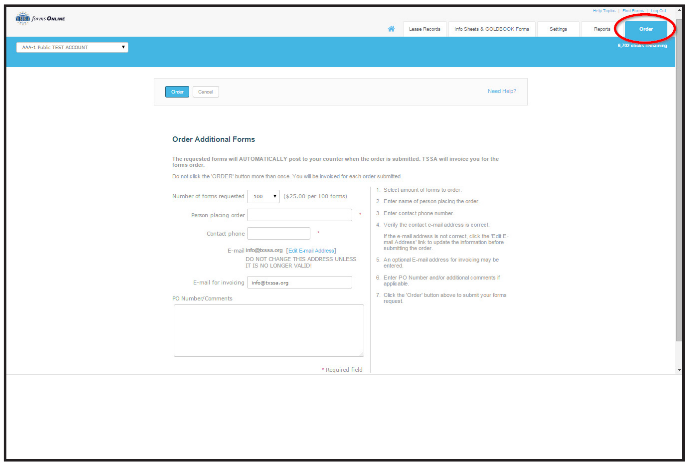
When the clicks counter gets low, a hazard symbol will appear next to the number of clicks remaining. You will also see a red banner across the top of the screen warning you that your clicks are low.



NOTE:
To receive an e-mail notification when your clicks counter is low, go to ***Settings > General Settings > E-mail Notifications***.

How to More Order Clicks

1. When logged into TSSA Forms Online, click the ***Order*** tab in the upper right corner of the screen.

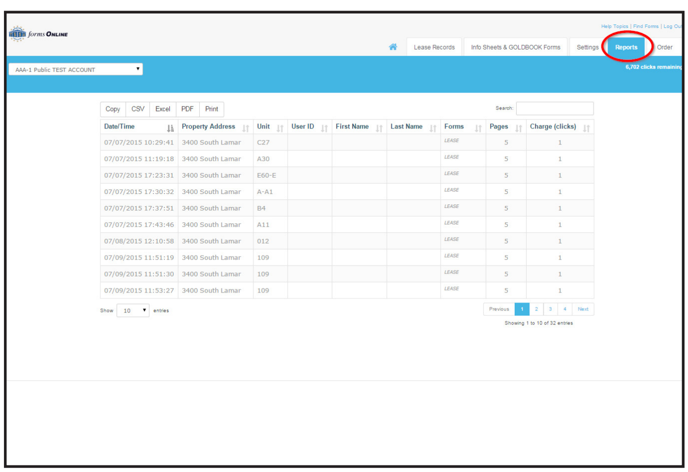


2. Complete the fields on the order form including:
   - Number of Forms Requested
   - Person Placing Order
   - Contact Phone Number
   - Email for Invoicing
   - PO Number/Comments (optional)

3. Click the ***Order*** button to complete your order. The clicks counter will automatically update. You'll receive an invoice for your order from TSSA.

Reports

You can view a list of print jobs for the previous 30 days by clicking the Reports tab when logged into TSSA Forms Online. You may view the date and time of each print transaction, what forms were printed, which user printed the transaction, and how many clicks were charged for the transaction.



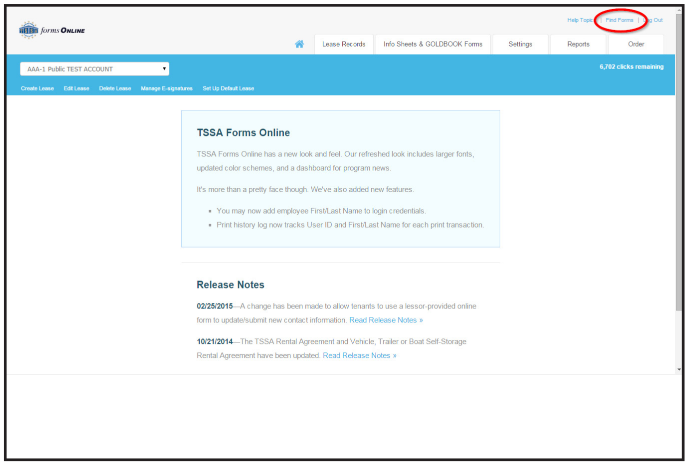
NOTE:
If at any point you have questions regarding a specific print transaction, contact Blue Moon Technical Support at 512-322-0999.

Available TSSA Forms

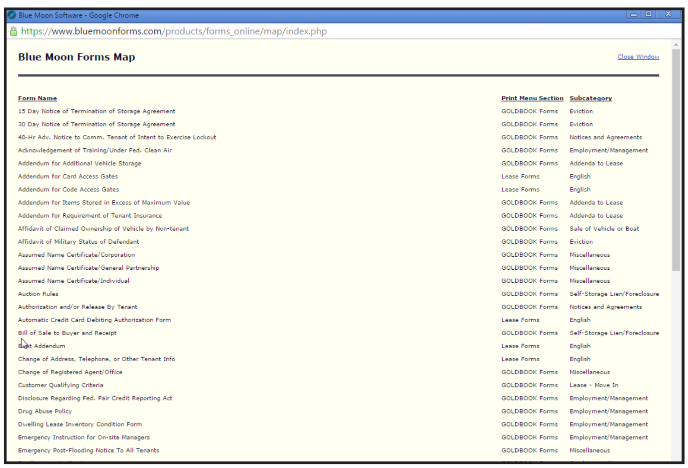
TSSA Forms Online includes a current list of available forms and their location in the program.

Follow these steps to view a current list of available TSSA forms:

1. When logged into TSSA Forms Online, click ***Find Forms*** in the upper right corner of the screen.



2. A new pop-up window will display a list of the available forms and their location in the Print Menu.



TSSA Prorate Calculations

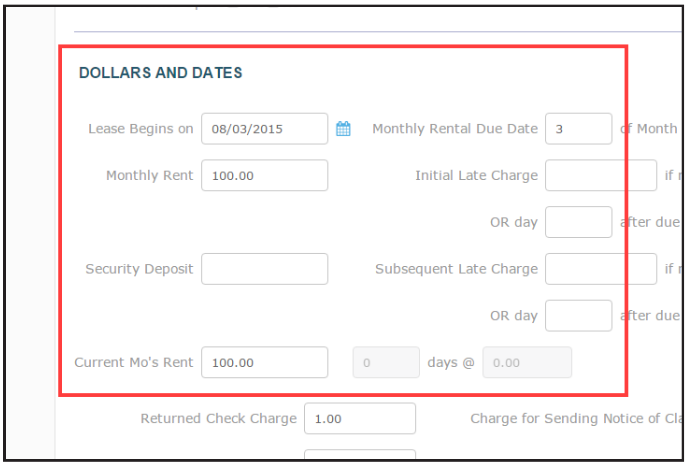
There are different methods for how proration can be calculated using TSSA Forms Online. This section will discuss the five different methods including:

- Anniversary Date Method
- Prorate First Month's Rent
- Prorate First Month and Collect 2nd Month (only after the 15th)
- Collect Full First Month and Prorate 2nd Month
- Import Proration Information (Do Not Calculate)

Anniversary Date Method

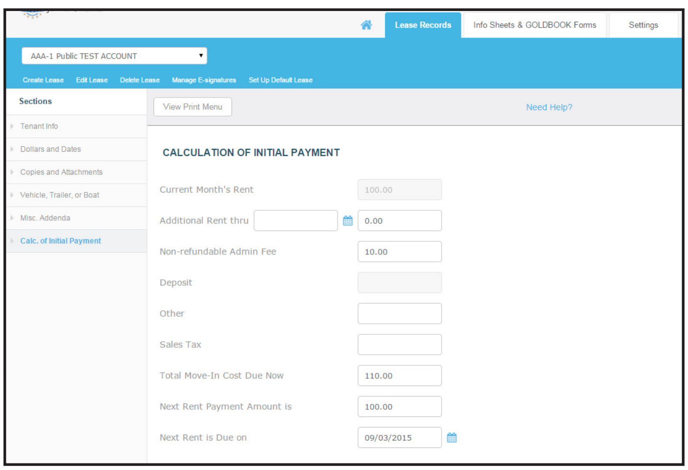
The Anniversary Date Method means that you will not have any type of prorate. Instead, the full monthly amount will be exactly the same each month and it will be due on the same day every month as the beginning date of the lease. Below is an example of what the settings may look like using the Anniversary Date Method of proration.

Dollars and Dates:



1. The Lease Begins On date is 8/3/2015.
2. The Monthly Rent is $100.00.
3. The Monthly Rent and the Current Mo’s Rent should be IDENTICAL.
4. You will NOT show any pro-rated amount.

Calculation of Initial Payment:

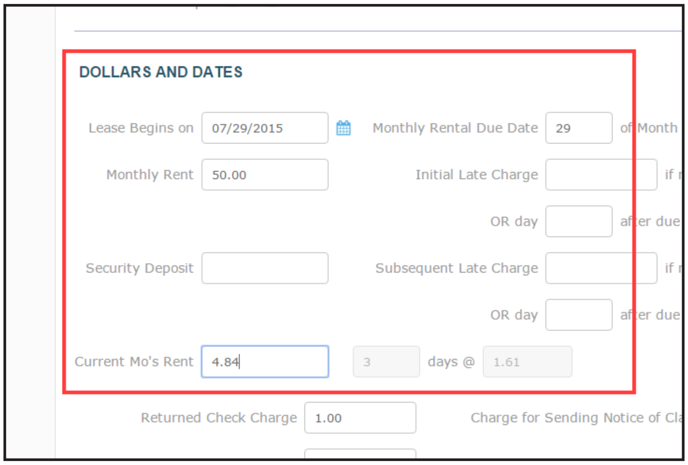


1. Current Month’s Rent should be IDENTICAL to Monthly Rent (in the Dollars and Dates section).
2. The DATE & AMOUNT for Additional Rent thru should be BLANK.
3. Next Rent Payment Amount should be IDENTICAL to Monthly Rent (in the Dollars and Dates section).
4. Next Rent is Due On should be exactly one month from the Lease Begins on date.

Prorate First Month

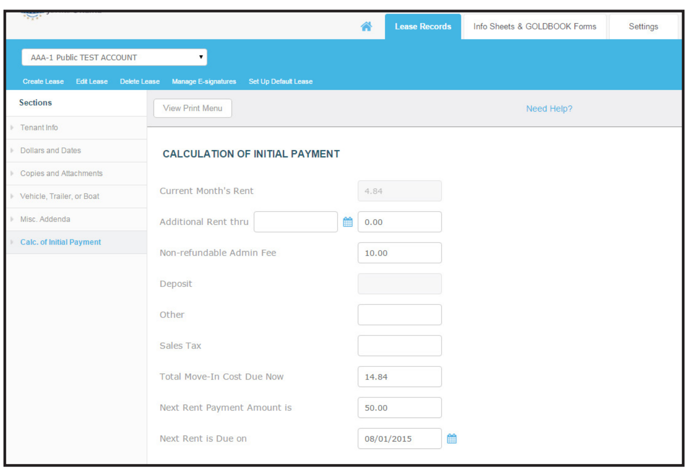
When using this method, dates and calculations will also be affected by whether you have selected prorate using actual dates in the month or prorate using 30 days per month in the TSSA Forms Online settings.Below is an example of what the settings may look like when using the Prorate First Month method and you are prorating using the actual days in the month.

Dollars and Dates:



1. The Lease Begins On date is 7/29/2015.
2. The Monthly Rent is $50.00.
3. The program is dividing the Monthly Rent ($50.00) by the exact number of days in the month (July has 31 days). The program includes TODAYS date as one of the prorated days. Now $50.00/31 is actually $1.612903225 but since our program only allows two places after the decimal point, it is rounded to read $1.61. So $1.61 x 3 days is really $4.83 which is NOT what is displayed in Current Mo's Rent. Instead, Current Mo's Rent displays the truer total of $1.612903225 x 3 days = $4.84.

Calculation of Initial Payment:

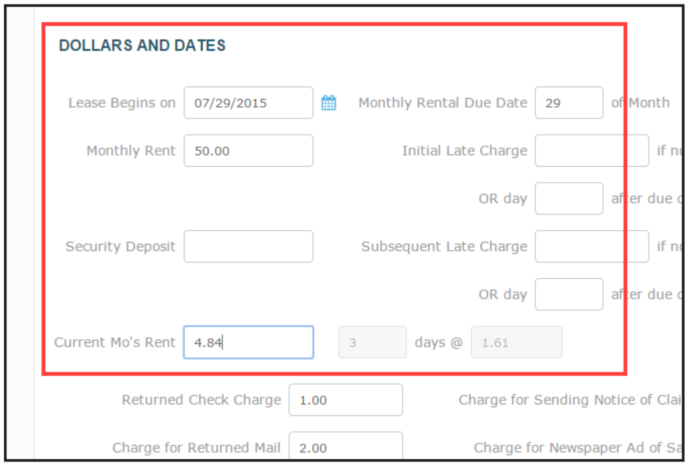


1. Current Month's Rent should pull directly from Current Mo's Rent (in the Dollars and Dates section). THIS IS THE PRORATED AMOUNT.
2. The DATE & AMOUNT for Additional Rent thru should be BLANK.
3. Next Rent Payment Amount should be IDENTICAL to Monthly Rent (in the Dollars and Dates section).
4. Next Rent is Due on should be the first day of the month following the Lease Begins on month.

Prorate First Month & Collect 2nd Month (Only after 15th)

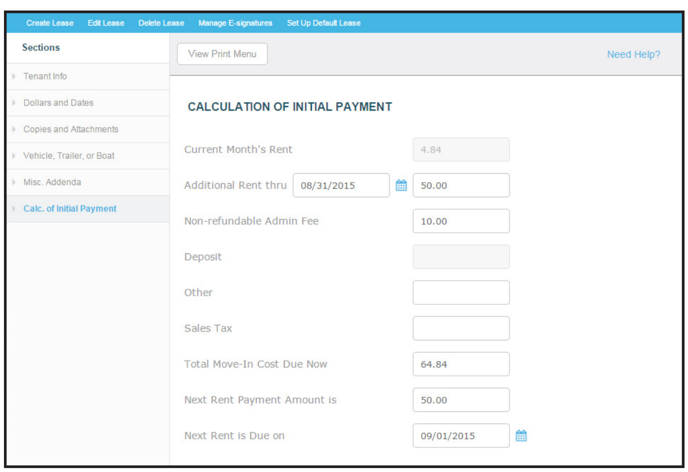
When using this method, dates and calculations will also be affected by whether you have selected prorate using actual dates in the month or prorate using 30 days per month in the TSSA Forms Online settings. Below is an example of what the settings may look like when using the Prorate First Month & Collect 2nd Month method and you are prorating using the actual days in the month.

Dollars and Dates:



1. The Lease Begins On date is 7/29/2015.
2. The Monthly Rent is $50.00.
3. The program is dividing the Monthly Rent ($50.00) by the exact number of days in the month (July has 31 days). The program includes TODAYS date as one of the prorated days. Now $50.00/31 is actually $1.6129032258 but since our program only allows two places after the decimal point, it is rounded down to read $1.61. So $1.61 x 3 days is $4.83 which is NOT what is displayed in Current Mo's Rent. Instead, Current Mo's Rent displays the truer total of $1.6129032258 x 3 days = $4.84.

Calculation of Initial Payment:



1. Current Month's Rent should pull directly from Current Mo's Rent. (in the Dollars and Dates section). THIS IS THE PRORATED AMOUNT.
2. Additional Rent thru should be the last day of the next month following the Lease Begins On month. Since the Lease Begins On date is 7/29/2015, the Additional Rent thru date should be 8/31/2015.

The Additional Rent thru amount should be IDENTICAL to Monthly Rent (in the Dollars and Dates section).

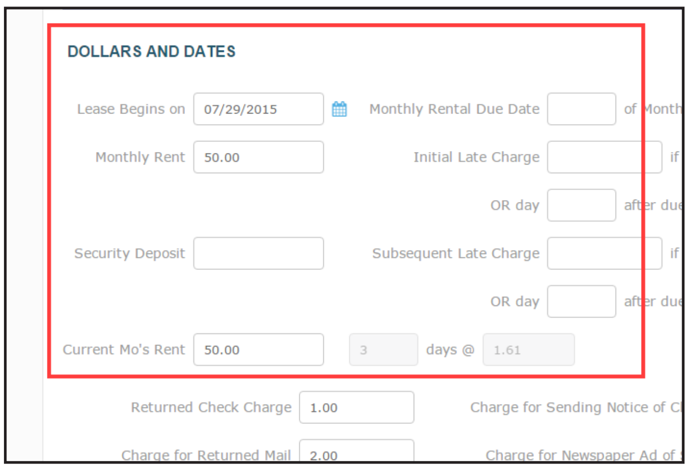
3. Next Rent Payment Amount should be IDENTICAL to Monthly Rent (in the Dollars and Dates section).

4. Next Rent is Due on should be the first day of the month following the Additional Rent thru month. So, the lease begins on 7/29/2015, the additional rent thru date is 8/31/2015, and next rent is due on 9/1/2015.

Collect Full First Month & Prorate 2nd Month

When using this method, dates and calculations will also be affected by whether you have selected prorate using actual dates in the month or prorate using 30 days per month in the TSSA Forms Online settings. Below is an example of what the settings may look like when using the Collect First Month & Prorate 2nd Month method and you are prorating using the actual days in the month.

Dollars and Dates:

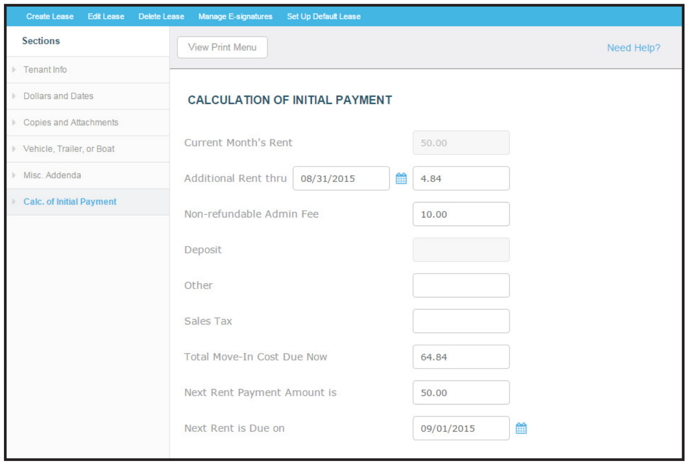


1. The Lease Begins on date is 7/29/2015.

2. The Monthly Rent is $50.00.

3. The Current Mo’s Rent should be IDENTICAL to Monthly Rent because you are only prorating the SECOND month’s rent which appears in the Calculation of Initial Payment section under Additional Rent thru.

Calculation of Initial Payment:



1. Current Month's Rent should be IDENTICAL to Monthly Rent under Dollars and Dates.
2. Additional Rent thru should be the last day of the next month following the Lease Begins on month. Since the Lease Begins on date is 7/29/2015, the Additional Rent thru date should be 8/31/2015. The Additional Rent thru amount IS THE PRORATED AMOUNT. The program is dividing the Monthly Rent ($50.00) by the exact number of days in the month (July has 31 days). The program includes TODAYS date as one of the prorated days. Now $50.00/31 is actually $1.6129032258 but since our program only allows two places after the decimal point, it is rounded down to read $1.61. So $1.61 x 3 days is $4.83 which is NOT what is displayed in Current Mo's Rent. Instead, Current Mo's Rent displays the truer total of $1.6129032258 x 3 days = $4.84.
3. Next Rent Payment Amount should be IDENTICAL to Monthly Rent (in the Dollars and Dates section).
4. Next Rent is Due On should be the first day of the month following the Additional Rent thru month. So, the Lease Begins on 7/29/2015, the Additional Rent thru date is 8/31/2015, and Next Rent is Due on 9/1/2015.

Import Proration Information (Do Not Calculate)

The Import Proration Information method means TSSA Forms Online will NOT make any prorate calculations. Instead, the calculations will all import into TSSA Forms Online from your property management software.

NOTE:
If there is an error in calculation, it will be from your property management software.

Settings

Administrative Access & Multiple Users

The System Configuration section of TSSA Forms Online contains options for configuring your software license. You can view general settings and property settings for your license as well as configure lease editor and printing settings, or manage user accounts and custom forms.

Administrative Access/Master User ID

By default, Blue Moon Software creates the Master User ID based on your TSSA Facility #. When your online account is created, an account activation email is sent to the address indicated on the order form submitted to TSSA. The person that receives the email will be asked to finish the account creation process by entering their First and Last Names, the User ID, and a password. This person will now be considered the Master user.

The person(s) with the Master login information has unrestricted access to all the features of the program. Most often, the person(s) with the Master login information will be accessing the Settings portion of the program to make any changes.

Access Levels Explained…

- ***Master*** – original User ID entered when the account was created; has full access
- ***Administrator*** – additional User ID created by Master user; has full access
- ***User*** – additional User ID created by Master or Administrator; has restricted access

NOTE:
The Master user will be marked with a red asterisk when viewing the User ID list in the Manage Users section of the program.

Multiple Users

TSSA Forms Online allows multiple users to login and work in the same account simultaneously. Any changes made to lease records are not always reflected in real-time. You should be aware of the following scenarios when multiple users are working in the same account simultaneously.

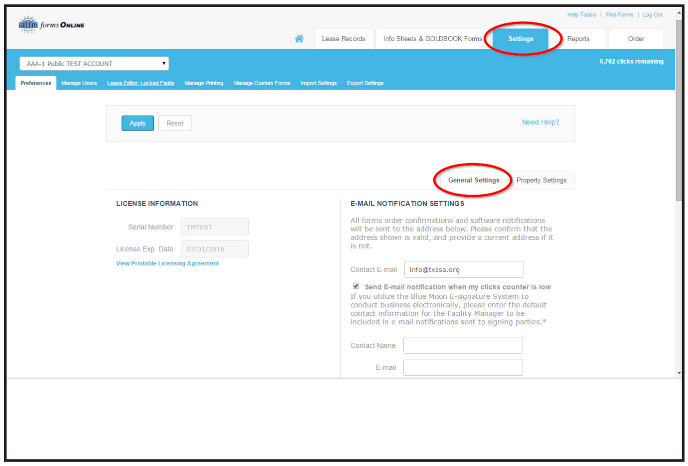
The number of clicks displayed in the clicks counter is not updated in real-time. This means that the clicks used by one user when printing, may not be reflected in the clicks counter for another user logged into the same account on a different computer, until the clicks counter has been refreshed.
The last changes saved take precedence over all previous actions. If two users are working in the same lease record simultaneously, any changes that User A has saved will be overridden by any changes User B saves after User A. Blue Moon Software recommends that only one user work in a lease record at a time.

Account Preferences

General Settings

When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***General Settings***.

General Settings houses the following settings/options:

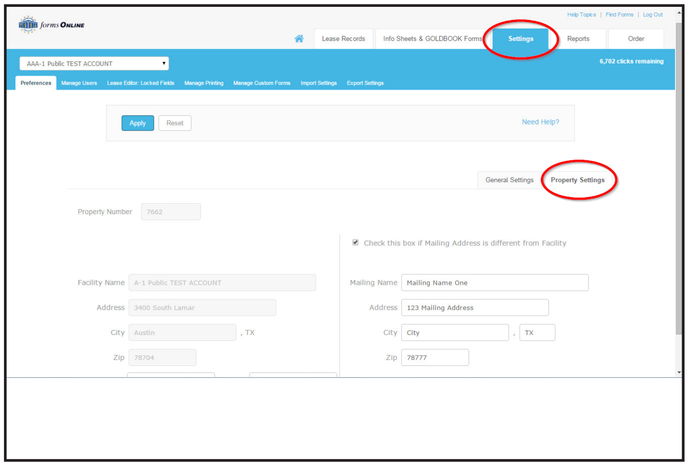


- ***License Information***
  Serial number and license expiration date are listed.
  View a printable version of your software license agreement.
- ***Email Notification Settings***
  Provide a current facility email address.
  Check the box if you would like to receive an email notification when the clicks counter is low.
  If you plan to use the eSignature feature, include the default contact info to be included in email correspondence.
- ***Prorated Rent Method***
  Select how your facility will prorate rent.
- ***Calculate Daily Prorated Rent By***
  Select how your facility will calculate daily prorated rent.
- ***Third-Party Vendor Integration***
  Enable manual options for when duplicate lease records occur when using a 3rd-party software.
- ***Electronic Signatures***
  Enable the E-signature feature.
  Select credit card types accepted as payment at your property (if any)
- ***Importing from Windows Forms Software***
  If you have converted from the Windows product to the Forms Online product, you may use the Blue Moon Data Conversion Utility to convert your Windows data over.

Property Settings

When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Property Settings***.

Property Settings houses the following information:



- ***Property Number*** – your property number may be needed for third-party vendor integration
- ***Facility Information*** – facility name, address, city, state, zip code, and phone/fax numbers
- ***Mailing Address*** – if your mailing address is different from the facility address, provide the info

Managing User Accounts

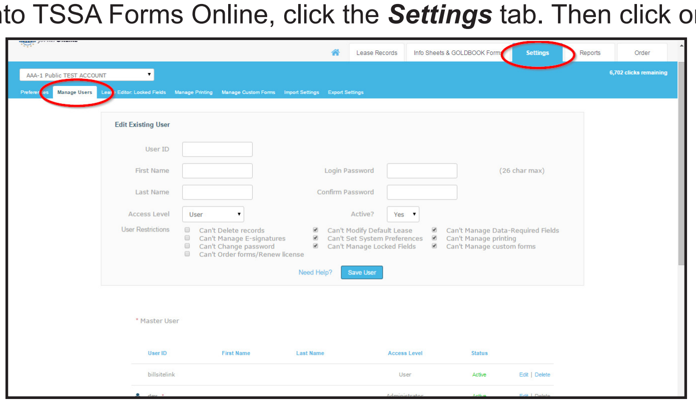
Any user with Master/Administrative login information may manage user accounts by adding new users, editing existing users, changing passwords, or assigning access rights to users. You should be aware of the following information regarding the Master User ID:

- The Master User ID cannot be deleted or deactivated.
- The Master User ID cannot be changed or renamed.
- Only a user logged in with the Master User ID can change the password for the Master User ID.
- The Access Level of the Master User ID cannot be demoted to "User."

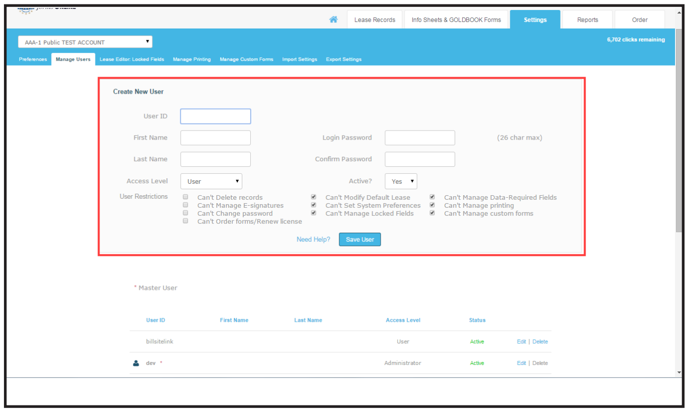
NOTE:
Additional User IDs given Administrative (full) access can delete other users excluding the Master User ID.

Follow these steps to create a new user account:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Manage Users***.



2. Enter a new and unique name in the ***User ID*** field. Complete all the fields in the ***Create New User*** section.



NOTE:

The User ID chosen should not match any of the existing User IDs listed in the bottom portion of the screen. Otherwise, the options for the existing account bearing the same User ID may be overwritten. It is NOT possible to have more than one account with the same User ID.

When creating a User ID there is a 20-character limit. Characters entered can only be letters and numbers. No spaces or symbols are allowed. User ID's are NOT case-sensitive, which means that "willows" is the same as "WiLLoWs."

3. Select an option from the ***Access Level*** drop-down menu. You may select from two options:

- ***User*** – allows you to customize what program features the user has access to
- ***Administrator*** – allows the user unrestricted access to all features of the program

If you have selected the "User" access level in Step 3, you may restrict the user's access in the following ways:

NOTE:

By default, the boxes next to the following four settings will not be checked.

- ***Can't delete records*** – the user cannot delete any lease records
- ***Can't manage eSignatures*** – the user cannot execute leases signed by eSignature
- ***Can't change password*** – the user cannot change their password, nor can Blue Moon Software reset the password for the user
- ***Can't order forms/renew license*** – the user cannot order additional forms/clicks, nor can they renew the software license

NOTE:

By default, the boxes next to the following six settings will be checked.

- ***Can't modify default lease*** – the user cannot make changes to default lease settings
- ***Can't set system preferences*** – the user cannot modify any system preferences
- ***Can't manage locked fields*** – the user cannot modify what fields are available/locked in the lease editor
- ***Can't manage data-required fields*** – the user cannot modify what fields require data in order to allow printing
- ***Can't manage printing*** – the user cannot modify which forms are available to print
- ***Can't manage custom forms*** – the user cannot modify which custom forms are available to print

NOTE:
A person assigned the “User” access level may access the ***Settings*** section of the program, but will only have access to certain program features based on the selections you make in Step 4.

4. Select whether to make the User ID you are creating active or inactive by selecting “yes” or “no” in the ***Active?*** drop-down field. If “no” is selected, the user will not be able to log into TSSA Forms Online.

5. Create and enter a password into the ***Login Password*** field.

NOTE:
When creating a password there is a 26-character limit. Characters entered can only be letters and numbers. No spaces or symbols are allowed. Passwords are case-sensitive.

6. Re-enter the password into the ***Confirm Password*** field.

7. Click the ***Save User*** button. The user account you have created will appear in the list of existing User IDs in the bottom portion of the screen.

NOTE:
The Master User ID will be marked with an asterisk in the User ID list.

Editing an Existing User Account

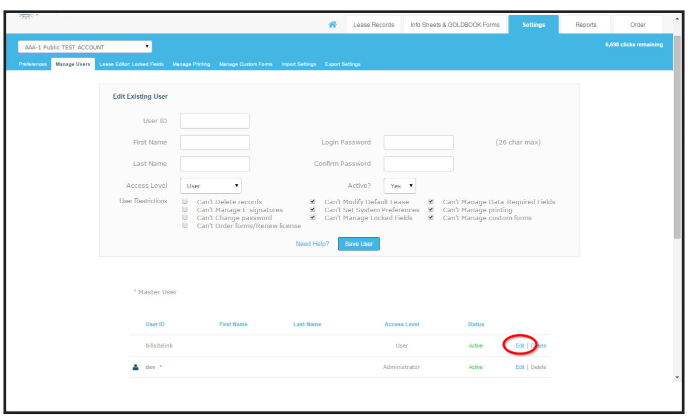
The Manage Users section can be used to make changes to a user account after it has been created. For instance, if a user account has been restricted from being able to order clicks, users with Administrative login information may lift that restriction by editing the user account.

Follow these steps to edit an existing user account:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Manage Users***.

2. Locate the user account you would like to edit in the bottom portion of the screen.

3. Click the ***Edit*** link next to that user account.



4. The fields in the ***Edit Existing User*** section will populate with the current settings for the selected user account.

5. You can then change the Access Level, change restrictions, or change whether the account is active or not.

6. You can change the password by deleting what is already in the ***Login Password*** field and entering a new password. Re-enter this password in the ***Confirm Password*** field.

7. After making the desired changes, click the ***Save User*** button.

NOTE:
The User ID for an account cannot be changed. If a new User ID is entered in the ***User ID*** field and the ***Save User*** button is clicked, a new user account will be created.

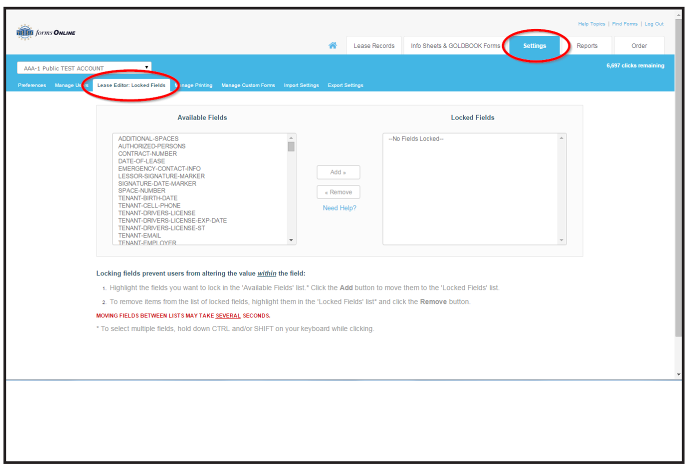
Lease Editor: Locked Fields

Users with Administrative login information may edit which fields in the lease editor are available to modify and which fields are locked for other user accounts.

NOTE:
User accounts (other than the Administrative user accounts) will be restricted from editing locked fields in the lease editor. Locked fields will appear grayed out signaling that they cannot be modified.

Follow these steps to manage locked fields in the lease editor:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Lease Editor: Locked Fields***.



2. The ***Available Fields*** window displays all the fields on the lease editor that can currently be modified.

3. To lock a field, select a field in the ***Available Fields*** window and click the ***Add*** button to move it to the ***Locked Fields*** window.

4. To unlock a field, select a field in the ***Locked Fields*** window and click the ***Remove*** button to move it to the ***Available Fields*** window.

NOTE:
To select multiple fields at once, press the CTRL key while selecting each field. Press the SHIFT key to select multiples fields in a row.

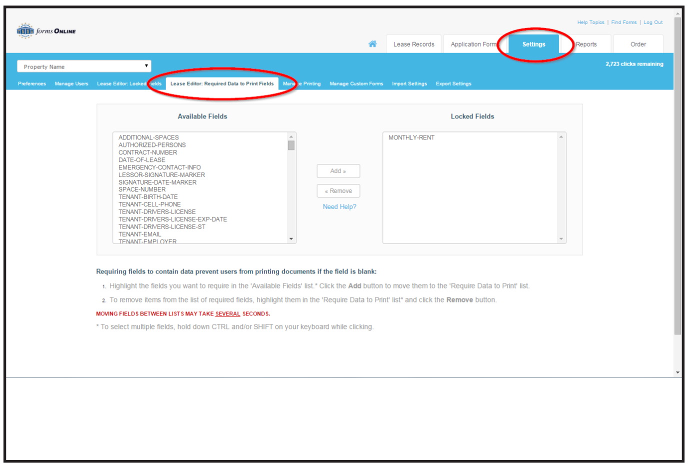
Lease Editor: Required Data to Print Fields

Users with Administrative login information can manage what fields require data input in order to allow printing. For instance, an Administrator can make the MONTHLY RENT field require data input so that any form that has a MONTHLY RENT field cannot be printed/generated without the RENT field completed.

NOTE:
When a field requires data, it will appear in the lease editor outlined in red and will be marked with an asterisk. The user will receive a message when attempting to print a form with missing data informing them the form cannot be printed until required data is entered.

To manage required data to print fields, follow these steps:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Lease Editor: Required Data to Print Fields***.



2. The ***Available Fields*** window displays all the fields on the lease editor that can be made to require data input.

3. Select a field in the ***Available Fields*** window and click the ***Add*** button to move it to the ***Required Data to Print*** window. Any field added in this manner will require data input before allowing a user to print any form including this field.

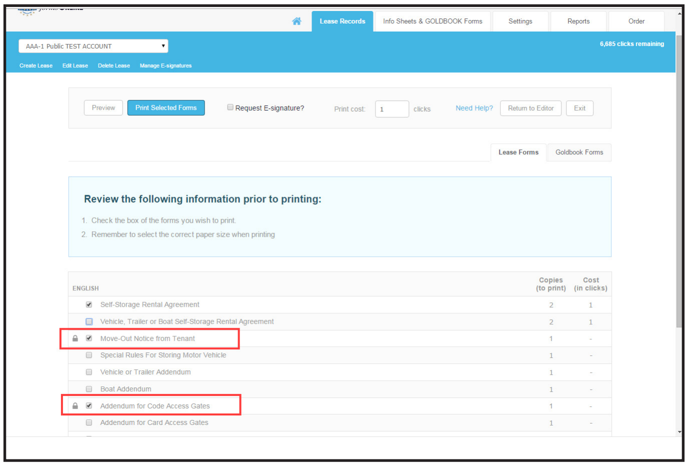
4. Select a field in the ***Required Data to Print*** window and click the ***Remove*** button to move it to the ***Available Fields*** window. Any field removed in this manner will NOT require data input before allowing a user to print any form including this field.

NOTE:
To select multiple fields at once, press the CTRL key while selecting individual fields. Press the SHIFT key to select multiples fields in a row.

Manage Printing (Print Menu)

Users with Administrative login information can manage what forms automatically print out as part of a rental agreement (locking forms in), or remove forms that appear in the print menu for other users (disabling forms).

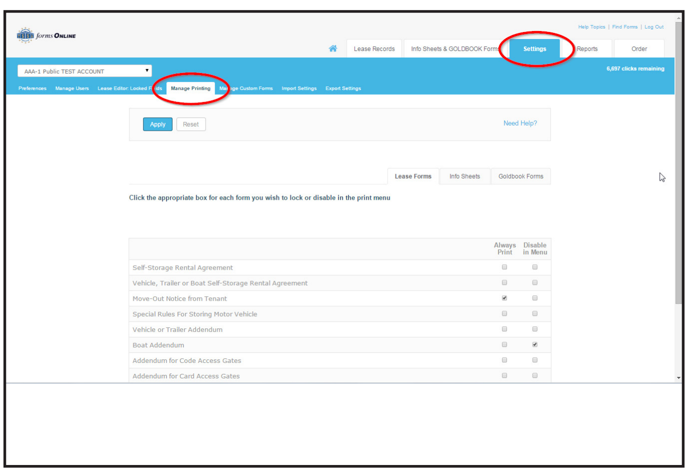
- Forms that are locked in as part of the rental agreement will appear in the Print Menu with a lock icon next to them (see below). This means that these forms will automatically be included any time a rental agreement is generated. These forms cannot be deselected or unchecked.



- Forms that are disabled in the Manage Printing section will not appear in the Print Menu at all when viewed by other non-Administrative users.

Follow these steps to manage printing:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Manage Printing***.



2. Check the box in the ***Always Print*** column next to the forms that you want to automatically include when generating a rental agreement package.

3. Check the box in the ***Disable in Menu*** column next to the forms that want to remove from the Print Menu altogether.

4. When you are done making your selections, click the ***Apply*** button.

5. To reset the selections to the last saved settings, click the ***Reset*** button.

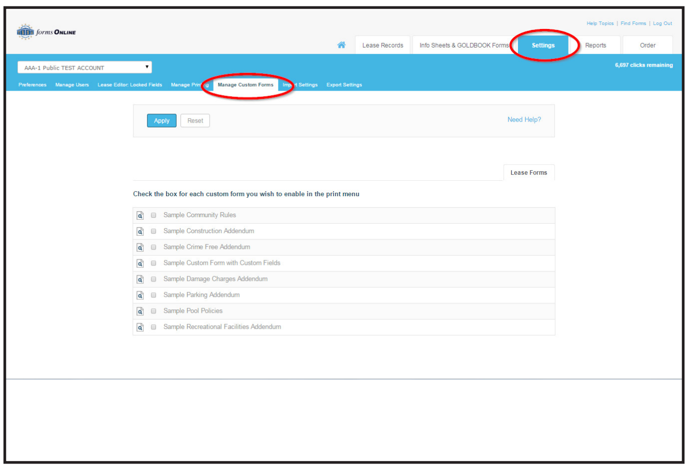
Manage Custom Forms

Some management companies require the ability to include custom forms in their rental agreement that are not found in the standard set of lease forms available via TSSA Forms Online. In these cases, Blue Moon Software can work with management companies to make these custom forms available in TSSA Forms Online for their portfolio of facilities.

Custom forms are management company-specific, meaning your management company must contact Blue Moon Software with custom forms requests. If your company has arranged for its own custom forms to be included in TSSA Forms Online, the forms must first be activated by a user with Administrative login information in order to be available for printing in the Print Menu.

Follow these steps to manage custom forms:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Manage Custom Forms***.



2. A list of the custom forms available will appear. To preview a form before adding it to the Print Menu, click the ***View*** icon to the left of that custom form.

3. To make a custom form available to the user in the Print Menu, check the box next to that custom form.

4. When you are done making your selections, click the ***Apply*** button.

NOTE:
Once a custom form has been enabled, you can then manage that form in the Manage Printing section by following the instructions in the previous section titled “Managing Printing”.

Importing & Exporting Settings

Users with Administrative login information can store the configuration settings to a file that can then be imported or exported. The settings that can be stored include:

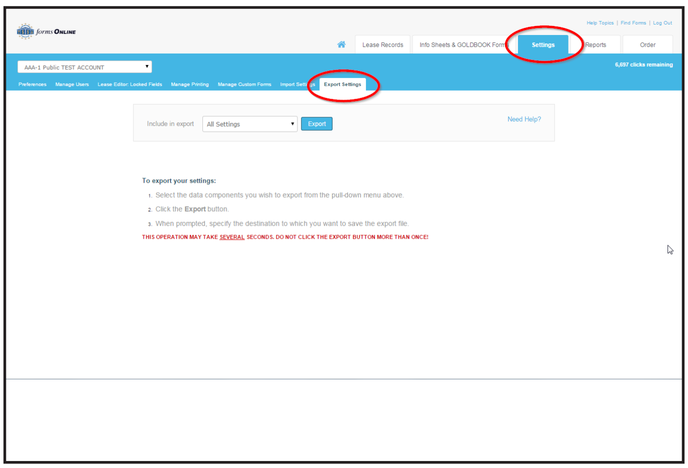
- system preferences
- locked lease fields, print menu settings, custom forms, etc.
- default lease settings

For example, if a management company has configured the account for Facility A, and they want to configure Facility B the exact same way, the company can export the settings from Facility A's license, and import them into Facility B's license.

Exporting Settings

Follow these steps to export the current settings of your TSSA Forms Online license:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Export Settings***.



2. Select which settings you would like to export from the Include in export drop-down menu. You can select from the following:
  - ***All Settings*** – system configuration and default lease settings will be exported
  - ***System Configuration Only*** – only the system configuration settings will be exported
  - ***Default Lease Only*** – only the default lease settings will be exported

3. Click the ***Export*** button. A dialog box will appear. Select a location to save the settings file.

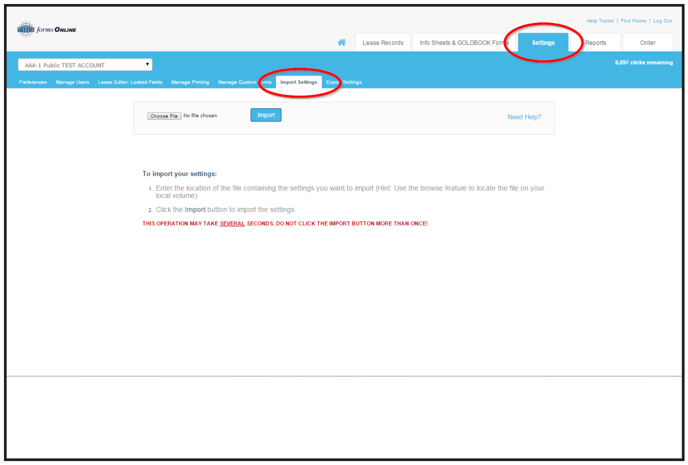
4. Once you have selected a location to save the file, click the ***Save*** button.

NOTE:
Do NOT modify the contents of the settings file!

Importing Settings

Follow these steps to import configuration settings for your TSSA Forms Online license from a file:

1. When logged into TSSA Forms Online, click the ***Settings*** tab. Then click on ***Import Settings***.



2. Click the ***Choose File/Browse*** button. A dialog box will appear. Locate the settings file you want to import and click ***Open***.

3. Click the ***Import*** button.

4. A warning dialog box will appear. If you are sure you want to proceed with the import, click ***OK***.

NOTE:
When a settings file is imported, all previous configuration settings will be overwritten, and this action cannot be undone. Please be sure you want to overwrite the existing settings before continuing!

5. When the settings file has been imported successfully you will receive a message. Click ***OK***.