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About SiteWare

SiteWare is a facility operations platform that helps streamline inspections, audits, and operational workflows for self-storage businesses.

SiteWare – Customer Help Document

1. Overview

The **SiteWare add-on for Storeganise** connects your self-storage operations directly to the SiteWare facility operations platform.

Once the add-on is installed, SiteWare automatically synchronizes facility data and tenant activity from Storeganise, eliminating the need for manual data entry.

This integration enables storage operators to monitor facility activity, automate operational workflows, and manage inspections and audit tasks from a centralized platform.

Channel	Description
Real-time Webhooks	Instantly notify SiteWare when operational events occur such as tenant move-ins and move-outs
Scheduled Data Sync	Retrieves updated facility data from Storeganise at regular intervals

2. Prerequisites

Requirement	Description
Storeganise Account	A valid Storeganise account with at least one facility site configured
SiteWare Account	An existing SiteWare account or one created during installation
Marketplace Access	Access to the Storeganise Add-on Marketplace
Login Details	Email address and password for the SiteWare account

3. Installing the Add-on

3.1 Locate the Add-on

1. Log in to the **Storeganise Admin Dashboard**
2. Navigate to the **Marketplace or Add-ons section**
3. Search for **SiteWare**
4. Click **Install**

3.2 Setup Form

Field	Description	Example
First Name	User's first name	Mani
Last Name	User's last name	Kumar
Email	Email used to log in to SiteWare	mani@company.com
Password	Secure password	Minimum 8 characters
Phone Number	Contact number	9876543210
Country Code	Country dialling prefix	+91

After entering the required information, click **Confirm** to complete the installation.

4. What Happens After Installation

Step	Description
Operator Account Registered	SiteWare registers the Storeganise operator account
SiteWare Tenant Created	A new SiteWare account is created
Initial Data Import	Facility data such as sites, units, renters, leases, invoices, and payments are retrieved
Webhooks Activated	Real-time notifications are enabled

After setup is complete, you will receive a **welcome email from SiteWare** containing your login details.

5. Data Synchronization

Daily Data Sync

Data Type	Description	Used in SiteWare for
Sites	Facility locations	Facility dashboards
Units	Individual storage units	Walkthrough reports
Unit Types	Storage unit categories	Occupancy reporting
Renters	Tenant information	Lease tracking
Leases	Rental agreements	Lease reports
Invoices	Billing records	Financial summaries
Payments	Payment transactions	Revenue reporting

6. Real-Time Audit Tasks

Event in Storeganise	Task Created in SiteWare
Tenant Move-In Completed	Unlock Unit Move-In Inspection Task
Tenant Move-Out Completed	Lock Unit Move-Out Inspection Task

Each task includes:

- Unit ID
 - Site ID
 - Lease reference
 - Assignment date
 - Due date
-

7. Using SiteWare

Feature	Description
Audit Tasks	Manage move-in and move-out tasks
Occupancy Dashboards	Monitor facility occupancy
Walkthrough Reports	Conduct facility inspections
Lease Tracking	View lease history
Financial Summaries	Review invoices and payments

8. Troubleshooting

Issue	Solution
Welcome email not received	Check spam folder
Data not appearing	Wait for initial sync
Audit task not created	Verify move-in/out event
Account updates needed	Update profile settings

9. Support

Contact Method	Details
Email	support@siteware.com
