Storeganise

OPERATOR GUIDE · V1

Getting the most from the Storeganise AI Connector

A practical guide to turning your live data into analysis, actions, and ready-to-send writing.

Read-only | Live data | Runs on a schedule

Built on the Model Context Protocol

storeganise.com

THE AI CONNECTOR GUIDE

What's inside

The heart of this guide is a library of ready-to-use prompts, organised by area of your business — each one written to analyse, predict, draft, or recommend an action. An advanced section at the end shows how to make your best ones run on their own.

SECTION 01

What the AI Connector is

The AI Connector links your Storeganise account to the AI tools you already use, like Claude and ChatGPT. Once it is connected, your AI assistant can read your live operational data: sites, units, unit types, rentals, invoices, payments, customers, move-ins, move-outs, valet orders, jobs, and the system audit trail.

You ask in plain English and get answers from your own numbers in seconds. The point is not to look up a figure you can already see in your dashboard. The point is to put that data to work: spot what is changing, predict what happens next, decide what to do, and draft the message that does it.

This guide is not about set-up, which takes a few minutes and is covered step by step in the **help doc**. It is about what to ask once you are connected, and how to get from a useful one-off answer to reports and checks that run on their own.

THREE THINGS TO KNOW

It is read-only. It can read and analyze your data, but it cannot change anything in Storeganise. It will never edit a record, move a tenant, message a customer, or adjust a price.

It uses your live data, so every answer reflects the state of your account at the moment you ask.

You stay in control. You choose the AI tool, you create the access key, and you can revoke it whenever you want.

SECTION 02

What it can do for you

Your dashboard already shows you the numbers. The connector is for the questions a dashboard cannot answer in one click:

Analysis that ends in a recommendation. Not "here is occupancy by site" but "here is which site needs attention and the three things to do about it."

Prediction. Which tenants are likely to leave next month, which unit types are about to run out of space, where revenue is heading.

Writing built from real data. Rate-increase letters, overdue follow-ups, lien notices, and move-out confirmations, drafted with the actual tenant, unit, and balance pulled from your account.

One picture from many sources. A full customer history (rentals, invoices, payments, and system actions) gathered into a single answer before a difficult call.

Reports that did not exist before. Revenue per square foot, churn by month, payment-reliability patterns, custom cross-site benchmarks.

Governance and oversight. A factual audit of who changed what, with the unusual activity flagged for you.

The test for a good prompt: if the answer is a single number you could read off a dashboard, the connector is underused. Ask it to compare, predict, prioritize, draft, or recommend the next action. That is where it earns its place.

One limit worth keeping in mind: the connector finds, analyzes, and drafts. It does not act inside Storeganise, and it does not send anything to customers. A person reviews and sends. For pricing, financial, or legal output, treat what it produces as a strong draft and check it before you act.

SECTION 03

Getting connected

The AI Connector installs as an Add-on in your Storeganise account, set up for you by the Storeganise team, so **contact us** to get started. Once it is installed, connecting takes a few minutes:

1. Create a read-only API key in `Main Settings > Developer > API Keys`. Set the role to `api`, then select the permissions the connector should have. This step matters: the role on its own grants no access, so the AI can only read the data whose permissions you tick. Most operators select all permissions for full read access, but you can be granular and leave some data out if you prefer.

2. Add Storeganise as a custom connector in Claude, or a custom app in ChatGPT, using the URL `https://mcp.storeganise.com/mcp`

3. Sign in with your Storeganise domain and key, then turn the connector on in your chat.

TWO THINGS THAT SAVE SUPPORT TICKETS

Keep the role as the read-only `api` key — it is all the connector needs, and keeps your access tight — and remember to select your permissions, since an `api` key with none ticked can read nothing. Keep the key private. Full step-by-step instructions for both Claude and ChatGPT, including plan requirements and troubleshooting, are in the **help doc** and under `Main Settings > Add-ons > AI Connector`.

SECTION 04

Try these first

Three prompts that show what the connector does that a dashboard cannot. Run them, then explore the library by area.

What needs my attention today

```
Across all my sites, what are the three things that most need my attention
today, and what would you do about each? Look at overdue accounts, move-outs,
vacant units, and anything unusual in the data.
```

A briefing, with judgment

```
Give me a morning briefing across every site: occupancy, overdue invoices, and
today's moves. Then tell me which single number you would worry about most and
why.
```

Know the tenant before the call

```
Pull the complete history for [customer name or email]: rentals, invoices,
payments, and system actions. Summarize the current status and flag anything I
should know before I speak to them.
```

> Ready for more? The prompt library that follows is organised by area of your business — revenue, collections, occupancy, customers, and operations. Copy, paste, and change the details in [brackets].

THE PROMPT LIBRARY

Useful prompts, organised by area of your business

Copy any prompt, paste it into Claude or ChatGPT with the connector switched on, and change the details in [brackets]. Each one does real work — it analyzes, predicts, drafts, or recommends an action. The more context you give, the sharper the result.

Revenue & pricing · Collections · Occupancy & churn · Customers · Operations

SECTION 05 · PROMPT LIBRARY

Revenue and pricing

Find the money you are leaving on the table, then draft the change.

Rate-increase opportunities, ranked by impact

```
Using my live data, find my rate-increase opportunities. For every unit type above
85% occupancy across all sites, compare the current rate to the rest of my portfolio
and to how quickly these units fill. Recommend a specific new rate for each, show the
monthly and annual revenue it would add, and rank them by impact. Flag any where a
rise is risky because turnover is high.
```

Draft the rate-increase letter

```
I am raising the rate on [unit type] at [site]. Using the live rental data, draft a
rate-increase notice for the affected tenants: explain the change, the new rate, the
date it takes effect after their required notice period, and a line that values their
custom. Give me a warmer version for tenants who have been with me over a year.
```

Below-market tenants and what to do about them

```
List active rentals paying more than 10% below the current listed price for their
unit type, grouped by site, with the gap and how long they have been on the old rate.
Recommend which to bring up to market now, which to phase in, and which to leave
alone, with your reasoning for each.
```

Local market check

```
Find the storage facilities within 5km of [my site]. Pull their unit sizes,
advertised prices, climate-control options, and Google review scores. Compare them to
my live pricing and occupancy, then recommend three specific pricing moves and tell
me what their reviews suggest I could win on.
```

Add a competitor or web connector alongside Storeganise. Competitor data comes from the web, not Storeganise; the connector compares it against your live pricing and occupancy.

Raise rates with care: the data showing you can raise a price does not always mean you should. Frequent or aggressive increases can cost more in churn and goodwill than they earn. Use the connector to spot the opportunity, then apply your own judgment on timing and how far to push.

Collections and cash flow

Turn an overdue list into this week's priorities, with the follow-ups already drafted.

This week's collections priorities

```
Using my live data, run a collections review across all sites. Group overdue invoices by age
(1-7, 8-14, 15-30, 31+ days). For each account show the tenant, site, unit, amount, days
overdue, whether the unit is overlocked, and their payment history (usually reliable, or a
repeat pattern). Sort each group by amount owed, largest first. For the 15-30 and 31+ day
accounts, recommend a specific next step: a call for first-time late payers, a formal notice
for repeat offenders, lien preparation for 31+ days with no response. Total the overdue
balance and show it as a percentage of monthly revenue. Present it so a site manager can act
without further analysis.
```

Draft the follow-ups

```
For my accounts 14 or more days overdue, draft a follow-up for each stage: a friendly
nudge at 14 days, a firmer reminder at 30, and a formal pre-lien notice beyond that. Pull
the tenant name, unit, and balance from the live data, keep the relationship intact, and
include a clear way to pay. Do not send anything; prepare them for me to review.
```

Lien notice sequence

```
For unit [X] at [site], whose tenant is [N] days overdue by [amount], draft a three-stage
notice sequence from the live account data: (1) a formal overdue notice with the amount
and a payment deadline, (2) a lien notice referencing self-storage lien law for
[location], and (3) a public sale advertisement draft. For each, flag the jurisdiction-
specific details I must verify before sending, such as delivery method, notice periods,
and mandatory wording.
```

Drafting aid, not legal advice. Check every notice against the law in your jurisdiction before sending.

Chase failed payments

```
Show payments that failed or were declined in the last 30 days, grouped by site, with the
amount and customer. Draft a short, friendly message for each asking them to update their
card, and tell me which to prioritize by value.
```

SECTION 07 · PROMPT LIBRARY

Occupancy, churn and retention

Predict who is about to leave, then build the play to keep them.

Predict who is likely to leave

```
Using my live data, identify the tenants most likely to move out in the next 30 to 60
days. Base it on real signals: a recent run of late payments, payment reliability
getting worse, a recent downsize to a smaller unit, length of stay, or notable
changes on their account in the audit trail. Rank them by churn risk and by the
monthly revenue at stake, and for each explain the signal you spotted.
```

Build the retention play

```
For my ten highest-risk tenants, recommend a specific retention action for each,
based on why they look at risk: a check-in call, a loyalty rate, a downsize offer, or
fixing a service issue. Then draft the outreach message for the three highest-value
ones.
```

Turn long vacancies into a plan

```
List units vacant longest by site and type. For anything empty over 30 days, tell me
whether the problem looks like price, demand, or unit readiness based on comparable
occupancy, and recommend a specific action: drop the rate, run a promotion, or
convert the space. Draft a short promotion for the worst offenders.
```

What the move-out data is telling me

```
Show move-ins and move-outs over the last 90 days by month and site, calculate the
net occupancy change, and tell me which sites and unit types are losing tenants
fastest. What pattern do you see, and what two things would you test to slow it?
```

Customer communications and front desk

Everything you need before a conversation, and the document that follows it.

The full picture before a call

```
Pull the complete history for [customer or email]: rentals, invoices, payments, and
system actions. Summarize where things stand and flag anything I should raise or
avoid before I speak to them, such as an overdue balance, a recent rate change, or an
upcoming renewal.
```

Move-out confirmation and handover

```
Tenant [name] in unit [X] wants to move out on [date]. Using their live rental data,
draft (1) a move-out confirmation that states their paid-to date, any balance still
owed, and what 'clean and empty' requires, and (2) a short internal note for the team
on re-rent readiness.
```

Explain a clause in plain English

```
A tenant has asked about this clause in their rental agreement: [paste clause]. They
are asking because [context]. Write a clear reply under 150 words that accurately
reflects the clause, answers their actual question, and ends by noting that for
formal interpretation they should consult a lawyer. Separately, flag any wording I
should check with my own legal advisor, and keep that flag out of the tenant-facing
version.
```

Win back a recent move-out

```
List tenants who moved out in the last 60 days. Tell me which are worth approaching
based on how long they stayed and why they likely left, and draft a short, warm win-
back message offering [incentive].
```

SECTION 09 · PROMPT LIBRARY

Operations and oversight

The checks that keep you in control across every site.

Governance audit

```
Using my live data, produce a governance audit for the last 30 days. Group
significant actions by type: rate changes (unit, who, old and new rate), invoice
adjustments or write-offs, overlock and unlock actions, manual move-outs, access
permission changes, and failed jobs. Flag anything unusual: rate reductions outside a
bulk change, write-offs above [amount], actions outside working hours, unresolved
failures, or one user account making a disproportionate number of manual changes.
Present it factually; I will draw my own conclusions.
```

Month-end review, written for me

```
Using my live data, write my month-end review for [month]: revenue, payments
collected, outstanding balance, occupancy, and net move activity by site, plus the
three things most worth my attention next month. Write it as a one-page summary I can
forward to my partners.
```

Revenue per square foot

```
Calculate revenue per square foot for each
site from active rentals and unit
dimensions, rank the sites, and tell me
where to focus to lift the lowest
performers.
```

System health check

```
Are there any failed background jobs or
sync errors in the last 7 days? Show what
failed, why, and which ones need action
before they affect customers or billing.
```

SECTION 10

Tips for getting the best results

The single biggest thing you can do is give the connector context before you lean on it. Ask it something important with no background and it can fill the gaps with guesses. Give it a short brief about how your business runs and the answers become ones you can act on.

GIVE IT CONTEXT FIRST

Save a short business brief as a skill or project and let the connector read it every time. Cover your sites and what makes each one different, your unit types and pricing logic, your policies (notice periods, late fees, access hours), and what a good answer looks like to you. The connector reads your live data, and the brief tells it how your business actually works.

A FEW MORE HABITS THAT PAY OFF

1. **Ask for the action, not the number.** End prompts with "what should I do about it?" or "draft the message." That is where the connector beats a report.
2. **Be specific about scope.** Naming a site, a period, or a unit type makes answers faster and more accurate, especially on large portfolios. Start narrow, then widen.
3. **Ask for the format you want.** "Give me a ranked table," "keep it to five bullets," or "write it as a one-page summary I can forward."
4. **Build it in the chat, then save it.** Get a prompt working how you like, then ask: "Turn that into a reusable skill I can run every week." That is the bridge from a one-off question to an automatic report.
5. **Chain your questions.** The connector keeps context within a conversation. Start broad ("which sites need attention?"), then drill in ("now draft the overdue follow-ups for that site").
6. **Ask it to show its working.** "Which records did you base that on?" helps you trust and verify. Even heavy users check the numbers against the dashboard now and then.
7. **Review before you act.** For pricing, financial, or legal output, treat it as a strong draft. You make the decision and you send the message.

ADVANCED · MAKE IT REPEATABLE

Turn your best prompts into reports and checks that run on their own

The prompts so far are useful one at a time. The real value comes when you stop running them by hand. To make it concrete, we take one prompt — the collections review — and follow it all the way: from a question you type, to a skill your team shares, to a process that runs itself and reaches across your other tools. All of it using Claude's Cowork mode.

- From a prompt to an automatic report
- Repeatable processes worth setting up

SECTION 11 · ADVANCED

One prompt, all the way up the ladder

Take the collections review from the prompt library. On its own it is a strong prompt. Followed up this ladder, it becomes a process that runs your weekly collections for you.

Each rung takes a little setup once and a lot less effort every week after. The top rungs come alive in **Claude's Cowork mode**, which can run tasks on a schedule, build files, and pull several tools into one workflow — all without you in the chair.

A little more setup once	A lot less effort every week

1

Rung 1 · Ask

You type the collections review when you need it and read the result. It is already useful — the catch is that you have to remember to run it, and so does everyone else.

```
Run a collections review across all sites. Group overdue invoices by
age, show each account's balance, days overdue, payment history, and
overlock status, and recommend a next step for the worst accounts.
```

2

Rung 2 · Save it as a skill

Save that prompt once as a **skill** called "Collections review." Now anyone on the team triggers the same review with a short phrase and gets the same structured pack every time — follow-ups drafted, nothing missed, no re-explaining.

Example · "Collections review"

Type "collections review" and get the full prioritized list back, with a drafted follow-up for each account.

3

Rung 3 · Schedule it COWORK

In Cowork mode, set that skill to **run on its own**. Every Friday at 8am it pulls the latest overdue accounts, ranks them, drafts the follow-up for each, and posts the pack to your collections channel for the team to review and send. Nobody has to remember Friday.

Example · "Friday collections pack"

The pack lands in Slack before the team sits down, calls and notices already drafted.

4

Rung 4 · Watch it live COWORK

Cowork can turn the same data into a **live collections board** you bookmark. Open it any time and it refreshes: total outstanding, overdue split by age, the worst accounts, and what percentage of monthly revenue is at risk right now.

Example · "Live collections board"

The weekly pack tells the team what to do; the board tells you where things stand between packs.

5

Rung 5 · Connect everything COWORK

Add Stripe and Xero alongside Storeganise and the same process gets sharper. Before it drafts a single chase, it checks what has actually been collected in Stripe and reconciled in Xero — so you never chase a tenant who has already paid — and flags failed card payments to fix at the same time.

Example · "Your whole billing picture"

One process spanning Storeganise, Stripe, and Xero, so every chase reflects what is genuinely outstanding right now.

Where Cowork comes in: rungs 1 and 2 work in any Claude or ChatGPT account. Rungs 3 to 5 — where the review schedules itself, becomes a live board, and pulls in Stripe and Xero — are what Cowork adds on top. The same five rungs work for any prompt in this guide, from churn watch to the month-end review.

SECTION 12 · ADVANCED

Repeatable processes worth setting up

Concrete starting points. Set each up once and it runs on the cadence shown and lands where you work. All of them prepare and draft only, so anything customer-facing is yours to review and send.

1. The 7am briefing

DAILY

The three things that need attention across every site, with a suggested action for each.

Slack or your inbox

2. Friday collections pack

WEEKLY

Overdue invoices grouped by age, high-priority accounts flagged with payment history, and a draft follow-up for each, ready to review and send.

Shared folder or Slack

3. Auto month-end review

MONTHLY

Revenue, collections, occupancy, and net moves by site, written as a one-page summary in a branded PDF.

Emailed to you and partners

4. Churn watch

WEEKLY

A ranked shortlist of tenants showing at-risk signals, with a suggested save action and a draft message for the highest-value names.

Your customer team

5. Pricing radar

WEEKLY

Unit types flagged to raise or to promote, with a recommended new rate and the revenue impact, plus a scan of nearby competitor pricing where available.

Short recommendations list

6. Live portfolio dashboard

ALWAYS ON

A bookmarked page that refreshes occupancy, revenue, receivables, and churn every time you open it.

Lives in your browser

7. Reconciliation watchdog

MONTHLY

Storeganise against Stripe and Xero, discrepancies and miscoded entries only.

Pings only if mismatched

8. Governance audit

WEEKLY

Significant changes grouped by type, with anything unusual flagged for review.

You or your finance lead

9. Vacancy-to-marketing trigger

WEEKLY

Units empty longest, with a diagnosis and a draft promotion for anything over your threshold.

Your marketing channel

10. Capacity & expansion forecast

ON DEMAND

Waiting list and occupancy trend combined with local market data to project when you will run out of space and when to add capacity.

A planning summary

11. End-of-day exceptions check

DAILY

Failed jobs and unusual audit-trail activity.

Quiet unless it needs you

12. Lease-up tracker

WEEKLY

For a new or ramping site, occupancy against target with a simple on-track or behind call.

Your project channel

Coming with this guide: a ready-made AI Connector onboarding skill and starter pack, so your team can drop these processes in and have them running on day one.

SECTION 13

Your data stays yours

A quick reassurance for you and your team, since the connector reads real operational data.

The connector is **read-only**: it can read and analyze, never create, edit, or delete.

It **does not store your data**. The server reads it only when you ask a question.

Under the API terms of Anthropic and OpenAI, **API-submitted data is not used to train models** by default.

All traffic is **encrypted** (HTTPS and TLS), and you can **revoke or rotate your key** in Storeganise at any time.

You can use **Claude only** if you prefer not to use OpenAI.

For detailed compliance questions (GDPR specifics, SOC 2, penetration tests, named sub-processors, countersigned DPAs), contact the Storeganise team.

SECTION 14

Get started today

1. Connect the AI Connector to Claude or ChatGPT (a few minutes, see the **help doc**).
2. Run a prompt that ends in an action: try *"Across all my sites, what are the three things that most need my attention today, and what would you do about each?"*
3. **When it works, save it as a skill, then schedule it in Cowork.** That is the point where the connector starts working for you instead of waiting on you.

Storeganise is the first self-storage software you can talk to. The operators getting the most from it are not looking up numbers — they are asking what to do and getting the answer, the analysis, and the draft in one place. You can do the same, starting with your next conversation.

WANT MORE?

- Setup, plan requirements, and starter prompts: **help doc**
- The story behind the AI Connector: **storeganise.com/blog/ai-connector**
- More ready-to-use prompts: the Storeganise AI prompt library in the app
- Questions or a demo: **storeganise.com** or hello@storeganise.com

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