



Storage
Commander

Self Storage Owner's Guide to Switching Software Systems

Switching self-storage software is a big move. Although it's usually the best choice for your business, it can be tough to switch without missing a beat. That's what this checklist is here for! To help you plan, execute, validate, and optimize a seamless migration process.

WHY PROPER DATA MIGRATION MATTERS

When switching to new software, you have to move years of critical data safely and accurately. Otherwise, your business will be at risk.

What can go wrong?

- Data corruption or loss
- Incomplete tenant histories or billing errors
- Disrupted operations or customer service headaches
- Security gaps or compliance issues

When done correctly, you'll have no issues.

What does success look like?

- 99%+ accuracy in transferred records
- No missed payments, no lease disruptions
- Every user trained and ready to go on day one
- Complete reconciliation of unit inventory and tenant access

COMMON CHALLENGES OF SWITCHING SOFTWARE

Even though the benefits are significant, switching software can come with a few bumps. Here's what to watch for:

- **Data mix-ups:** Your old records might not match the new system's format, leading to messy imports.
- **Downtime worries:** You can't afford for operations to pause during the transition.
- **Team resistance:** Change is tough, especially if your staff isn't fully trained or bought in.
- **Tenant confusion:** If the switch isn't seamless, your customers might feel the disruption.

PLANNING AND PREPARING FOR MIGRATION

A successful switch starts with a solid plan. Pre-migration prep helps you avoid surprises, keeps your team on the same page, and makes sure your vendor knows exactly what matters most to you.

Set Goals

Determine what matters to your business and communicate those goals with your vendor. For example:

- Make sure tenant balances, gate codes, and payment history are accurate
- Minimize downtime—especially during business hours
- Preserve lease records and unit occupancy history
- Keep tenants in the loop during the transition
- Ensure your team is confident using the new system on day one

Take Inventory

Make a list of everything you'll be migrating: customer info, unit details, payment records, and anything else tied to your day-to-day operations.

Clean Up Your Data

Now's the time to get rid of anything you don't need. Don't move junk from one system to another.

- Archive or delete inactive tenants
- Remove duplicate customer entries
- Clear out old notes or alerts
- Confirm balances and flag anything that looks off

Back Up Data

Always save a full copy of your current data just in case you need to reference it later.

Make a Plan

Work with your vendor to map out every step. Know your migration date, who's doing what, and how the process will unfold. Your migration plan should include:

- The date and time of your switch
- Roles and responsibilities (for your team and theirs)
- What data is being moved—and what's staying behind
- Whether the system will be offline and for how long
- When and how your team will be trained

DATA SECURITY AND COMPLIANCE

Protecting data is critical when switching software. A secure migration keeps your business compliant and your tenant information safe from threats.

Use Secure Connections

Make sure your vendor uses encrypted protocols like TLS or SSL when transferring data. These protect sensitive information from being exposed or stolen during the move.

Limit Access

Only trusted team members should handle the migration. This might include your site manager, corporate IT lead, or operations lead.

- Set temporary passwords for anyone accessing sensitive data.
- Use role-based access controls to limit permissions.

Ask Vendor for Documentation

Get the entire process in writing. Here are the key documents to request:

- Migration summary report: This lists the migration date, responsible parties, and what data was transferred
- Validation checklist: Confirms successful transfer of key data like tenant records, unit details, and account balances.
- Access log: Tracks who accessed your data and when.
- Backup confirmation: Verifies your data was safely backed up before anything was moved.
- Security protocols overview: Explains the steps taken to keep your data safe (encryption, limited access, etc.)

TESTING AND VALIDATION

Test a small set of data before you dive into a full migration, test a small set of data first. This step helps you catch errors early and protects you from data loss, glitches, or disruptions down the line.

Run a Sample Migration

Pick a small batch of data from one location to see how it works in the new system.

- Verify that data is compatible.
- Spot any formatting issues or missing fields.
- Solve issues before running a full migration.

Double-Check Data

Once the sample data is loaded, check it for accuracy. Compare what shows up in the new system with your original records. Flag any mismatches, missing info, or weird formatting before moving forward.

- Tenant names and contact info
- Unit numbers and occupancy status
- Move-in/move-out dates
- Balances and payment history
- Access codes and gate activity (if applicable)

Involve Your Team

Have team members use the new system as they would on a normal workday. Ask for feedback on:

- Ease of use and how well it matches their workflow.
- Whether they can see the data they need.
- System performance (loading times, access to key features).

Review & Adjust

Share the test results with your software provider and work together to fix any issues. If needed, rerun the test to confirm that everything is resolved. Only move forward when

- The data checks out
- Your team feels confident
- You're comfortable with how everything works.

ENSURING A SMOOTH MIGRATION PROCESS

This is where all your prep work pays off. A smooth migration comes down to three things: extract, transform, and import – with a lot of communication in between.

Extract Your Data

This step usually involves help from your current vendor. You'll want to pull everything that matters:

- Tenant records
- Lease agreements
- Unit status and availability
- Payment history
- Gate access logs

Match Data to New Software Format

Your new software may organize things differently. Your new software provider will usually handle this with you. Just make sure you double-check that nothing important gets lost in translation. Common adjustments include:

- Switching date formats (e.g., MM/DD/YYYY to DD/MM/YYYY)
- Splitting full names into first and last
- Renaming fields to match your new system

Import Your Data Into the New System

Plan the import during off-hours if you can so your team and tenants aren't interrupted. Let your staff know ahead of time if there will be downtime, and stay in close contact with your vendor as the import begins. The fewer surprises, the better.

Monitor the Process Closely

Assign someone on your team to keep a close eye on things while the data is being imported. Ask your vendor for live updates or a post-migration report that summarizes what was imported and what, if anything, needs a second look. Keep notes of anything unusual, keeping an eye out for:

- Failed or missing records
- Mismatched info
- Slowness or errors

POST-MIGRATION BEST PRACTICES

The first few weeks after migration are critical for catching errors, supporting your team, and keeping tenants in the loop.

Compare Reports

Run side-by-side reports in both the old and new systems to verify that everything transferred correctly. Look for red flags like missing tenants, incorrect balances, or units that show as vacant when they shouldn't be. Involve site managers or regional leads. They'll spot inconsistencies fast because they know the day-to-day details.

Train Your Team

Once your data's in, your staff needs to know how to use the new system efficiently. Provide cheat sheets, how-to checklists, or FAQs they can reference on the fly. Offer hands-on training for critical tasks like:

- Move-ins and move-outs
- Payment processing
- Lease changes or renewals
- Reviewing gate access logs

Keep Tenants Informed

Let tenants know what to expect, even if the changes are minor. Use email, text, signage, or a message on your customer portal to spread the word. And make sure your front-line team is ready to walk tenants through anything new.

Monitor System Performance

Encourage your staff to report glitches, slowdowns, or anything that feels "off." Keep track of those issues and escalate them to your vendor with as much detail as possible. Schedule weekly check-ins (internally and with your vendor) for the first 2-4 weeks to review performance and stay ahead of any hiccups.

MIGRATION TIMELINE

A migration timeline helps break down the process into manageable steps and keeps everything on track. Here's what to expect:

Week 1-2: Get Ready

- Define your goals.
- List what you're migrating.
- Clean up and back up your data.

Weeks 3-4: Test the Waters

- Set up a test migration.
- Get feedback from staff.
- Finalize your migration plan.

Weeks 5-6: Make the Switch

- Extract, convert, and import your data.
- Monitor the process and troubleshoot.
- Train your team and notify tenants.

Week 7+: Post-Switch Support

- Review reports for accuracy.
- Offer extra training.
- Stay in touch with your vendor for help.

SWITCHING IS EASY WITH STORAGE COMMANDER

At Storage Commander, we're here to help every step of the way. Our tools are designed to simplify data migration, ensure smooth software transitions, and provide you with ongoing support. Explore our knowledge base for helpful resources, or contact us directly for personalized assistance.