Entry Form and Master Sheet Guide

Use the entry form for one guided task at a time, or open the Google Sheet when you need to review and update several rows.

Entry form	Master sheet
Best for finding and editing one record, adding one new record, or moving one existing record to Archive.	Best for reviewing many rows, comparing tabs, sorting or filtering, and making several straightforward spreadsheet updates.

Choose only the task you need. Each labeled task is separate - you do not complete them all in order. For a move-out or new renter on an existing unit, use Task D.

TASK A Find and edit an existing record

Use this task when the record is already listed and you only need to correct or update it.

1 Sign in - no tab selection needed for searching

Go to **access.storageaz.com** and select **Sign in with Google**. Use your approved office account. The master sheet and instruction links appear after sign-in.

2 Search all working tabs

In **Find a record - all tabs**, enter part of a customer name, serial number, invoice, address, or other recorded detail. Select **Search**. Your Working tab selection does not limit the search. The list stays empty until you search.

3 Select a Matching records result to open it

Wait for the search to finish. Each result starts with its sheet name. Click the correct result under **Matching records**; that click opens its edit form and selects the correct tab. There is no separate Open and edit button. Use **Cancel search** if needed.

4 Edit the opened record

The selected record opens on the right side. Change only the fields that need attention. Open **Additional fields** when the information you need is not shown in the main section.

5 Save and confirm

Select **Save** and wait for the saved message. Search again to confirm the update. **Cancel** closes the form without saving. If the record changed since you opened it, reopen it and review the latest values before saving again.

TASK B Add one new record

Search first. For a new renter on an existing unit, use Change tenant / Move out (Task D).

1 Search before adding

Search all working tabs using the strongest identifier available, such as the serial or invoice number. Review any matches first to avoid creating a duplicate.

2 Choose the destination working tab

Under **Working tab (for adding records)**, select where the new record belongs. For towing movements, choose **Barnett Deliveries Pickups** or **Catalina Deliveries Pickups**. Bills and payments have their own tabs.

3 Select Add new

Select **Add new**. The blank form opens on the right. This is a separate task from selecting a result under Matching records.

4 Enter the known information

Use the dropdowns and date fields. Inventory now has Product Description, Location, and Size choices; rental Location remains an address field. Keep identifiers exact, including leading zeros and suffixes. Do not guess missing information.

5 Save the new record

Review the identifying fields, then select **Save**. Search for the new record once to confirm that it appears in the correct working tab.

TASK C Archive another completed record

For tenant move-outs use Task D, not this generic Archive button. Keep the Inventory unit.

1 Find and review the existing record

Select the correct **Matching records** result and check its sheet and identifiers. Do not archive Inventory just because a renter moves out. Returned rentals are now archived by the return workflow.

2 Select Move to Archive

Select **Move to Archive**. The button changes to a confirmation step; the first click does not move the record. Follow any warning shown by the app.

3 Confirm the move

Select **Confirm move to Archive** only after checking the record. It leaves its working tab, with original values retained in Archive. To view it later, open Archive in the master sheet; app search does not include Archive.

TASK D Change tenant / Move out

Reuse the same permanent Inventory unit. Keep each renter's rental history separate.

1 Find the unit or its current rental

Search by the unit number or renter name. Open the correct Inventory or rental result, then select **Change tenant / Move out**. Unsaved edits must be saved or discarded first.

2 Check the unit and outgoing renter

The form shows the Inventory unit, its status, its rental category, and the linked current renter. Confirm these are correct. If the link is missing or ambiguous, stop and resolve it; do not guess.

3 Choose the task

Choose **Move out only - make rental available**, **Move out and add new tenant**, or **Add tenant to available unit**. Use **Correct current renter name - same person** only for a spelling or name correction, not a different customer.

4 Enter the new renter's information, if applicable

Enter the new customer name, rental unit number, due day (1-28), and start date. Add their business, address and notes if needed. Size and rental category come from Inventory. Do not put the outgoing renter's balance or notes into the new rental.

5 Confirm the inspection

For a move-out or move-in, check **Inspection completed and passed** only after the unit has actually passed inspection. A name correction does not require this checkbox. If inspection is not done, use the ordinary Returned status workflow described below.

6 Review, then confirm

Select **Review tenant change**. Read the proposed updates and select **Confirm and apply updates** once. Wait for confirmation, then search again. Cancel before confirming leaves records unchanged. A changed record or expired review requires a fresh review.

What happens when you confirm

Move out only: the outgoing rental leaves its size tab and goes to Archive. Inventory keeps the same unit and Record ID, clears the current customer and rental date, and becomes Rental Available with a passed inspection.

Replace or add a renter: a new rental gets a new Record ID linked to the same Inventory unit. Inventory shows the new customer and Rental status. The new rental does not inherit any old balance, delinquency or notes.

Name correction: Inventory and the existing linked rental receive the corrected name. The rental ID, balance and history stay with that same person. Nothing is archived.

TASK E **Check linked records for this search**

Check matching units first. A full-inventory review is a separate, deliberate option.

1 Save the Inventory changes first

Inventory is the authority for current unit identity, customer, availability and size/category. Do not edit a different renter's name over an old rental. Use Task D for that change.

2 Enter the unit or name to check

In **Find a record - all tabs**, type a specific value, such as **115** or **Courtney Burke**. Select **Check linked records for this search**. You do not have to click Search first. The check uses the typed text, not the Working tab or an opened result.

3 Wait, or cancel the check

Watch the progress indicator. **Cancel check** stops waiting, discards late results and makes the controls available again. No records change. A blank search never starts a whole-inventory check. A timeout also leaves records unchanged.

4 Check the scope and both lists

The review names your search and counts the Inventory units checked. A broad name such as Burke can match more than one unit; use a more specific name or serial to narrow it. Only matching units and their linked rentals are included. Read Proposed updates and Needs your attention.

5 Confirm only after reviewing

Select **Confirm and apply updates** once to apply the listed proposals, or **Cancel** to leave them unchanged. Warnings are not applied automatically. Reopen the affected records afterward. Reviews expire in 10 minutes and stop if data changed. Do not edit rows while applying; a confirmed update cannot be cancelled.

When you really want to check everything

Open **Whole-inventory check**, select **Check all inventory**, and confirm the scope prompt. This ignores the search text. The review will say **ALL INVENTORY**. It prepares at most 20 safe proposals at a time; run it again for any stated remainder. Nothing changes until you confirm the proposals.

What Inventory controls - and what stays separate

Inventory: permanent unit links, current customer and size/category. AMS On Site means on-site; Field means portable. Ambiguous links or different renter names are flagged, not guessed. Use Task D for a new renter.

Rental details: due day, street address, unit-number alias, dates, notes and balances remain separate.
History/accounting: Archive, old renter details, towing invoices and payments are not rewritten. Archiving preserves a balance; it does not mark it paid.

The entry form does not keep a separate copy. Every saved edit, new record, and Archive move changes the same Google master sheet used by the office.

Using the master sheet directly

1 Open the master sheet

After signing in to the app, select **Open master sheet**. Use the bottom tabs to move between Inventory, rentals, the two towing-company movement sheets, billing, Archive, and Instructions. Use the same approved Google account.

2 Choose the correct tab and row

Find the tab that owns the record. Search or filter when helpful, then confirm the identifying information before changing any cell.

3 Edit ordinary cells

Click a cell and enter the correction; Google Sheets saves automatically. Use existing dropdowns. Do not change table names, column headings, Record IDs, formulas, or validation ranges. Reopen the record in the app to see sheet changes; an already-open form does not refresh itself.

4 Add a row carefully

Enter a new row in the correct prepared table and leave **Record ID** blank; the edit helper assigns it. Confirm the ID appears before searching in the app. Never copy an existing Record ID. Use **Add new** in the app if you are unsure or the ID remains blank.

5 Keep Inventory as the authority

Change current unit information in Inventory. In the app, type that unit's identifier and select **Check linked records for this search**. Use **Change tenant / Move out** for renter changes. Do not delete the Inventory unit or reuse an old rental row for a new customer. Bulk pastes do not run linked actions automatically.

6 Record uncertain information

Do not guess at questionable dates, serials, suffixes, customers, or legacy source details. Record the question or decision in **Source Review** so the original information remains traceable.

Quick rules

Always	Avoid
Search before adding. Keep exact IDs. Save one record at a time. Refresh or reopen when another employee may have edited the same row.	Renaming or deleting tabs. Changing headers or Record IDs. Editing the same record in the app and the sheet at the same time. Making up missing information.

If something does not work

Search or a linked-record check is taking a while

Watch the progress indicator and elapsed time. Use **Cancel search** while finding records or **Cancel check** while reviewing links. Both stop waiting and discard late results without changing records. They do not cancel an update you already confirmed. A long check or search shows a timeout rather than waiting indefinitely.

No matches, missing matches, or a warning

Try a shorter name or serial fragment and check spelling. Search covers all editable working tabs, but not Instructions, Archive, or the hidden old combined movements backup. A warning about an unread tab means the results are incomplete. If a tab has more than 100 matches, narrow your search. Do not add a duplicate to work around a search problem.

TASK F Reconnect after your sign-in expires

Use this separate task only when the app shows the sign-in-expired notice.

1 **Keep the original form page open**

The app keeps your unsaved form on this page, but disables editing until you reconnect. Do not refresh or close this page if you need those unsaved changes.

2 **Sign in again in the new tab**

Select **Sign in again** and use the **same Google account** you were using on the original page. Complete sign-in in the new tab.

3 **Return and select Reconnect**

Go back to the original page and select **Reconnect**. Review your form before saving. If another employee changed the record meanwhile, reopen it and carefully reapply your intended changes to the latest version.

A save failed or you are unsure it finished

Read the message before retrying. If the connection dropped during Save, search or check the master sheet first to see whether the change was saved. Do not repeatedly add the same record. For access, missing-sheet, or repeated errors, send the administrator the message and the task you were doing - never a password or Google client secret.

Two important workflow reminders

Returns before inspection: marking a linked rental Returned, or completing its pickup, now archives that rental and clears Inventory's current customer. The unit remains in Inventory as Inspection Required. After inspecting it, set Inspection Result to Passed; it becomes Rental Available.

Towing: Record physical delivery/pickup work in the appropriate towing-company sheet. **We Charged** is the customer charge; **Total Bill** is the towing company's charge to the business. Carrier Bills and Payments remain separate. Recording a payment here does not send money or update accounting software.