

How to Upgrade to Simon Version 3

Go to the B&L Associates web site at <http://www.bnl.com>.

The main page of the B&L Associates web site will appear.



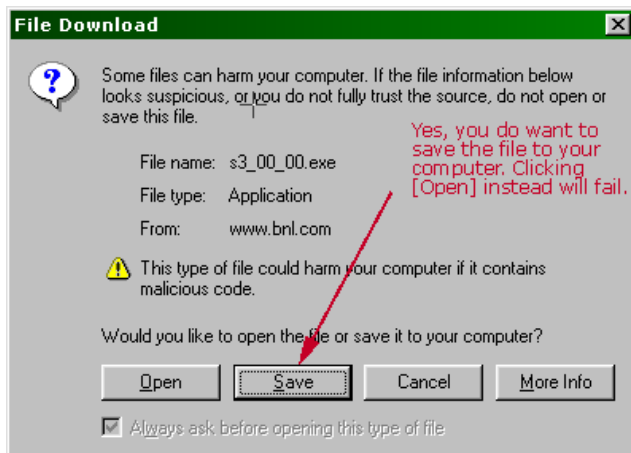
At the top, you will see a [Revisions] button. Click on this button.

On the Revisions page, you will see a link to the Simon Revisions area. Click on this link. A page will appear with a link to the file that you want to download to upgrade from Version 2 to Version 3. There may be more than this one file on this page from downloading, but you will only want to do this one file as shown in the screen capture.



Once you click on the [s_3.exe \(3.8MB file\)](#) link, you will get a dialog box that starts the process of downloading the file. This dialog box will vary in size, shape and content depending on the browser you use. The examples I show below will be for the Microsoft Internet Explorer Version 6.0.

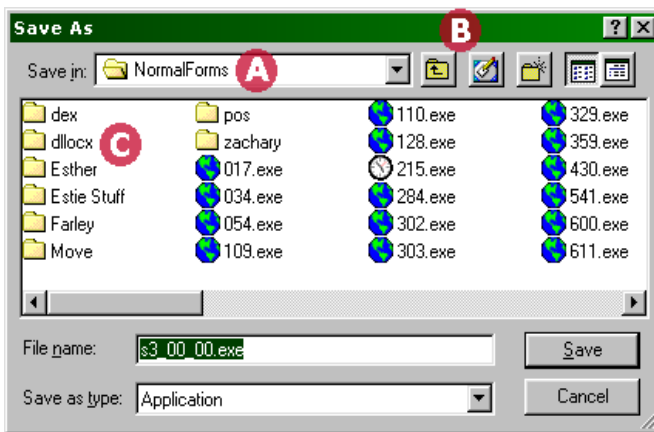
It is absolutely imperative that you click on the button that will allow you to save the file to your computer.



Like I mentioned above, the terminology may be different depending on the browser you are using, and the look of the window may vary as well, but you must save this file to your hard drive, or at least somewhere on your computer so that you can unzip the file properly. See, the image with the File Download title bar,

If you fail to handle this properly and decide to Open the file, your upgrade will fail—guaranteed.

When you click the Save button, another dialog box will appear.



This dialog box will ask you to where you want to save the file. In other words, on your hard drive, is there any specific folder where you want to drop this file.

I would suggest that you create a special folder on your hard drive where you can save all of the downloads you get from the Internet.

This will save you from always having to hunt down files, which can be a total pain!

Anyway, once you get the 'Save As' dialog box up on the screen, you should use the combo box at the top to find the location where you want to drop the download file. Sometimes it is already set to the correct location, other time you may be able to get close to where you want to drop the file and then double click on folders (bullet C) to get to the exact location you want.

See, bullet A in the image to see the combo box where you can select a location or a starting off point.

The actual [Simon] folder is not a good place to drop your download files.

You can also click on the button below and to the left of bullet B to back up to higher levels in the folder tree.

You can also double click on the folders next to Bullet C to open one of these folders.

Once your folder is listed in the 'Save in' box denoted by bullet A, you can click on the Save button to download the s_3.exe file to this location.

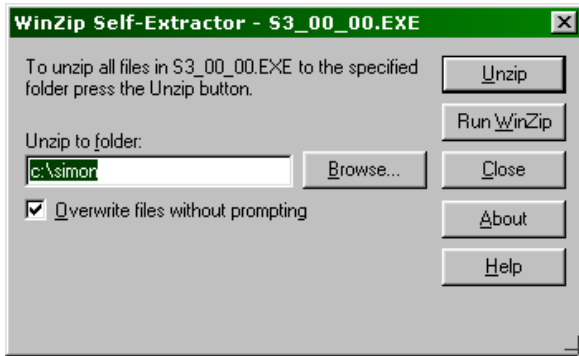
The download process may take a few minutes or much longer depending on the speed of your Internet connection. We use DSL here and it does not take long at all.

Once the file is downloaded, close your Internet connection since you will not be needing it for the rest of the process of upgrading to Simon Version 3.

Gary Note: Make absolutely sure that Simon is closed before you continue with the unzipping of the s_3.exe file. If you have Simon open when you do this, there will be a sharing violation (though you won't be told this). A sharing violation is simple an error whereby the unzip tool could not unzip a particular file because the file is in use by another application. If Simon is open, obviously at least one file is in use—simon.mde. Thus, the upgrade will not take place.

Another good rule of thumb is to make a copy of the entire Simon folder on your hard drive before unzipping. By doing this, you can always go back to the old Simon application if something goes horribly wrong.

You will need to find the file entitled **s_3.exe** on your hard drive in the location where you told your browser to place it. This is the file you just downloaded from our web site. Double click on this file. The WinZip Self-Extractor window will appear.

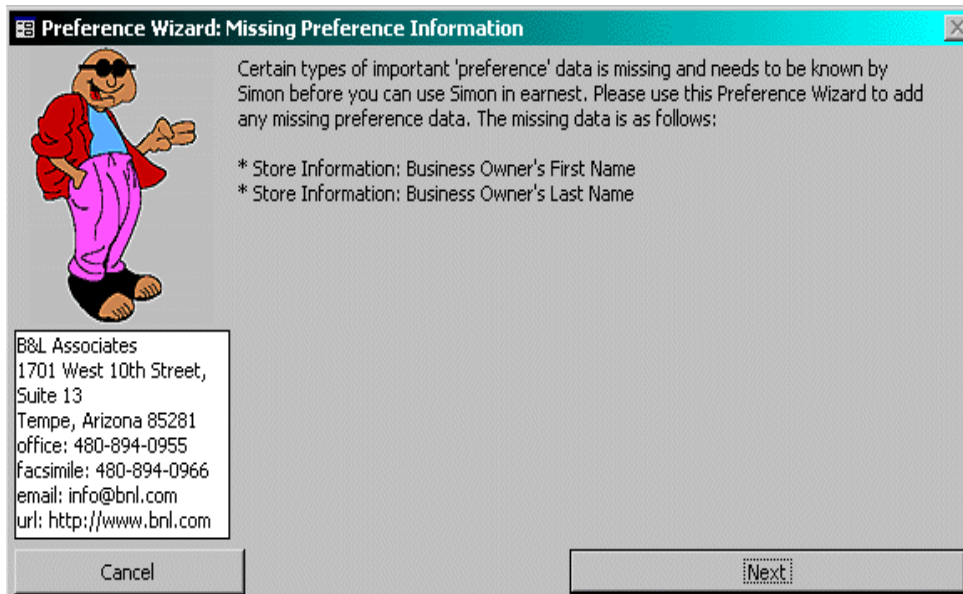


This is an automated tool that will extract the Simon files and drop them into the appropriate folder for you. All you need to do is click on the [Unzip] button to extract the files.

The process of extraction will occur and after a short time, you will get a message telling you that 12 files were extracted. You should answer OK, and then close the WinZip Self-Extractor. At the time when this article was written there were 12 files in this download. It is possible that later on, there might be more, but never less.

Once you have done this, you are finished with the upgrade process.

Now you are ready to open Simon.



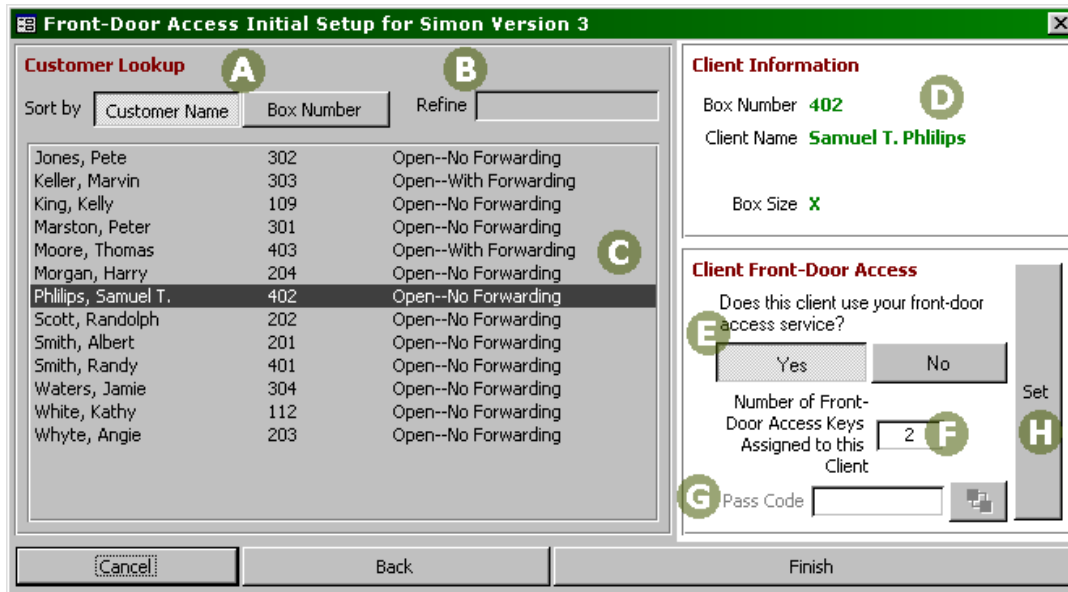
Several new windows will appear when you open Simon. You will need to read these carefully so you know what has taken place. One window that will surely appear will tell you that certain preference information is missing and needs to be added to Simon. This information is the owner's first and last name. We had to split out this information when we wrote Version 3 and could not recover it. This window is a variation on the Preference

Wizard that helps new users set up their business preferences. As you can see in the image, two items are listed as missing. If you click on the Next button, you will move through the Preference Wizard, and will be able to add missing data. After you have entered the missing data, you can close the Preference Wizard window.

Also of note is that, if you use Simon to tax fees and such, you will have to reset which history items will be taxable. The process for doing this has changed somewhat and, hopefully, will be easier to use. Those history items that have nothing to do with taxes will no longer be listed in the tax preferences area, and you will be able to select all and deselect all when adding or removing history taxability.

You can set your taxes using the Preference Wizard as well. The tax stuff will be a few pages past the area where you add the owner's first and last names.

Another window that will appear is the Front-Door Access Wizard. Since 24-hour front-door access services have been added at Version 3, I thought it wise to create a tool that will allow you to go in and add front door access preferences and then set your clients that use front-door access. This tool will add key deposits and such to the client record. I have added bullets to the Front-Door Access Initial Setup for Simon Version 3 image and will comment on each below.



A) You can sort the listing of clients either by customer name or box number.
 B) You can refine the list down to only show customers who fit the criteria entered in the Refine box. For instance, if you want to see only those with the last name of 'Smith,' enter 'smith' in the box and hit the tab key to list only those with smith in their

name. Now, 'Goldsmith' and Joe's Gunsmith shop will appear too, but this tool will help out immensely especially for those of you who have hundreds or thousands of clients.

C) This is a list of your clients, or a partial list based on choices made in the Customer Lookup area above. You should click on a client to work with their data. The client's name, box number and box size will appear in . . .

D) Shows client information. Make sure the client you want to work with is shown here before making changes in the Client Front-Door Access area.

E) Select Yes or No as to whether this client uses your front-door access services. This will start off as being set to No.

F) Set the number of front-door access keys, or key cards, you have issued to this client. Deposits made by the client will automatically be entered into the client record as long as you told Simon in the prior step to this one, that you have key/key card deposits.

G) Enter their pass code if you use them. The button next to the Pass Code box will generate a pass code, but you probably won't use this here.

H) Once the information about front-door access is set correctly, click on this button.

Another dialog box that might appear upon opening Simon will warn you if you have boxholders who have not paid rent and are past the point where you should close their box. This same warning box will tell you of mail forwarding clients that are due to have mail forwarded. Other warnings may appear here as well.

I hope you enjoy the changes to Simon!