

Revision 3.07.00 Upgrade

Revision 3.07.00 was released on May 26, 2005. This revision makes a lot of minor adjustments to Simon as well as changing, in a major way, several important forms.

This upgrade is an absolute must for all Simon users, especially those who have had trouble opening some of the wizard forms.

The problems with the wizard forms for some users was because of an Active-X calendar (mscal.ocx) that we embedded into the forms. We decided to remove the embedded calendars because of these problems. As you will see when reading the information below, the solution to the calendar problem is much better than the embedded calendars we used up until revision 3.07.00.

How to Get Upgraded

As mentioned above, this revision is an absolute must for Simon users. If you are one of those who are hesitant to upgrade, please do not neglect to do this one. For those who have not upgraded to Version 3, and are still using Version 2, we will not do technical support for Version 2 anymore—you will be instructed to upgrade to Version 3. And, for good reason. If your computer should crash, you will find that installing Version 3 on a new computer, your data will not be compatible with this Version. So, get upgraded!

Below, you will find instructions on how to upgrade to revision 3.07.00. Also, there is an article on the web site in the 'PDF Library' that gives good advice and good general information on how to get upgraded. If you are a novice at upgrading, I would strongly suggest that you read both the information below and the article from the web site.

Step 1: Write down your current revision number: ____ . ____ . ____
Open Simon
Click on the [Help] menu located at the top of the Simon window
Click on [About this Software]

Step 2: Make a copy of the Simon folder. This will protect your data, and your previous Simon program in the event the upgrade goes south.
On your computer desktop, right click on [My Computer].
Choose [Explore] from the shortcut menu list (the Exploring window will appear—a window with a left pane and a right pane where you can move, copy and paste files and folders.
In the left pane of the Exploring window, click on the folder icon next to the [C:\] drive.
Now, look in the right pane of the Exploring window. Find the [Simon] folder.
Right click on the [Simon] folder.
Click [Copy] from the shortcut menu list.
Hover your mouse over any white space area in the right pane of the Exploring window, right click this white space to bring up the shortcut menu.
Click on [Paste].

You should see a dialog box appear copying the Simon folder and all files within this Simon folder. After this is finished, you should be able to locate a new folder called [Copy of Simon]. If you see a folder call [Copy of Simon], you are ready to move on to the next step. Let me explain why we have added this step. The revision process will make changes to the contents of the [Simon] folder. If something should go wrong and Simon will no longer function after doing the upgrade, you can throw away the [Simon] folder and then rename the [Copy of Simon] folder to [Simon] to get back to where you were before doing the upgrade. Pretty nifty, huh!?!

Step 3: Download the file or files from our web site to upgrade to Version 3.07.00.

Go to our web site: <http://www.bnl.com>.

Click on the [Revisions] button, located at the top of all of our web page in the B&L Associates Logo.

Click on the "Simon revisions can be found [Here]" link.

Please read the instructions on the web page that comes up. Depending on your revision number, which you wrote down above, the files you need will differ. See below:

If you are at revision 3.01.00 or later, download:

[s3_07_00.exe](#) (see, Example A below)

If you are at a revision older than 3.01.00, download:

[s3_01_00.exe](#)

[s3_07_00.exe](#) (see, Example B below)

If you are at any version 2 revision, for instance, 2.03.04, or 2.05.03, or 2.06.00, or 2.06.01, download:

[s_3.exe](#) (see, Example C below)

Example A

You are currently at Simon Version 3 at revision 3.01.00 or later

Click on the [[s3_07_00.exe](#)] file listing in the table.

Click on [Save]

Note: When the dialog box appears, you should see an area called Save In. Be sure to save this file in a location on your hard drive where you will be able to find it. Do not put this file on your desktop. Drop down the list and find a location, maybe [My Documents]. You can save the above file anywhere that you wish, just remember where you saved them because after the download is complete, you will need to find the file so that you can unzip it.

After you have saved this file to your hard drive, close all programs running including the Internet. Make sure Simon is closed.

Find the file on your hard drive.

Click on the file, [[s3_07_00.exe](#)]

Click on the [Unzip] button.

That should do it. Now open Simon.

Example B

You are currently at Simon Version 3 at revision 3.01.00 or earlier (Example: 3.00.00, 3.00.01 or 3.00.02)

Click on the [\[s3_01_00.exe\]](#) file listing in the table.
Click on [\[Save\]](#)

Note: When the dialog box appears, you should see an area called Save In. Be sure to save this file in a location on your hard drive where you will be able to find it. Do not put this file on your desktop. Drop down the list and find a location, maybe [My Documents]. You can save the above file anywhere that you wish, just remember where you saved them because after the download is complete, you will need to find the file so that you can unzip it.

Click on the [\[s3_07_00.exe\]](#) file listing in the table.
Click on [\[Save\]](#)

After you have saved this file to your hard drive, close all programs running including the Internet. Make sure Simon is closed.

Find the file on your hard drive.
Click on the file, [\[s3_01_00.exe\]](#)
Click on the [\[Unzip\]](#) button.
Click on the file, [\[s3_07_00.exe\]](#)
Click on the [\[Unzip\]](#) button.
That should do it. Now open Simon.

Example C

You are currently at Simon Version 2 (Example: 2.03.00 or later, or 2.06.00 or 2.06.01 etc.)

Click on the [\[s_3.exe\]](#) file listing in the table.
Click on [\[Save\]](#)

Note: When the dialog box appears, you should see an area called Save In. Be sure to save this file in a location on your hard drive where you will be able to find it. Do not put this file on your desktop. Drop down the list and find a location, maybe [My Documents]. You can save the above file anywhere that you wish, just remember where you saved them because after the download is complete, you will need to find the file so that you can unzip it.

After you have saved this file to your hard drive, close all programs running including the Internet. Make sure Simon is closed.

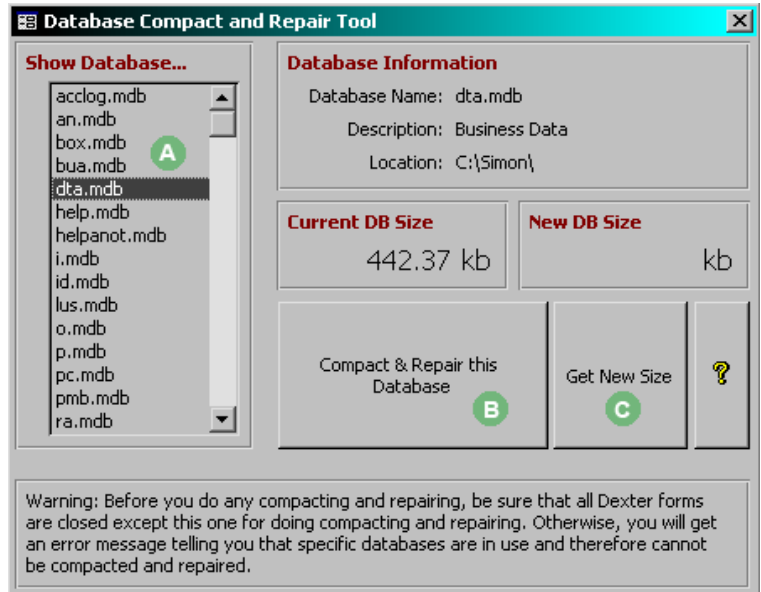
Find the file on the hard drive.
Click on the file, [\[s_3.exe\]](#)
Click on the [\[Unzip\]](#) button.
That should do it. Now open Simon.

After finishing these steps, you are up to our latest revision.

Revision 3.07.00 Changes

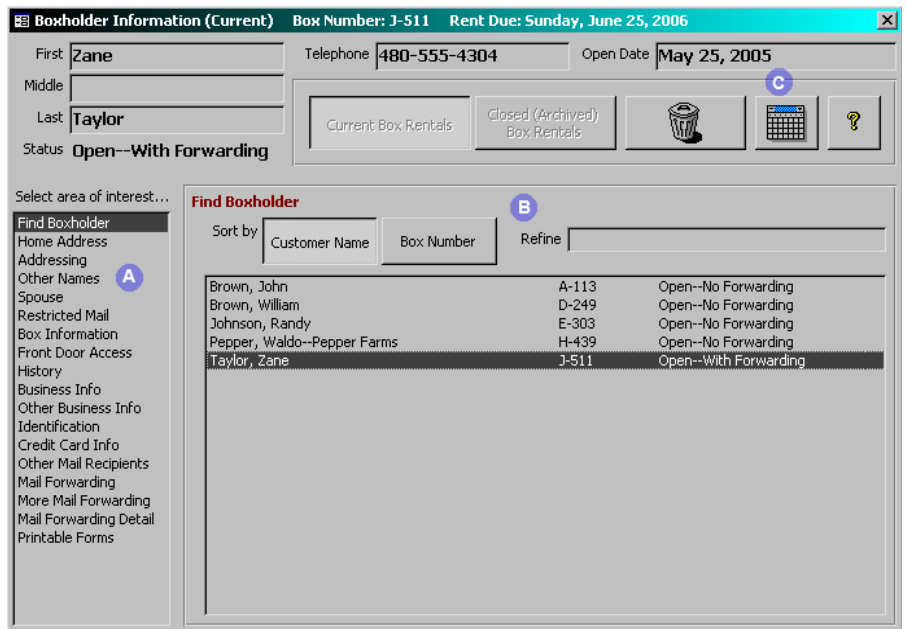
Before I discuss the actual changes made at revision 3.07.00, I want to mention one feature that was added a while back. This feature can be found by clicking on the Tools menu, and then choosing the Compact/Repair.

Upon opening this form, you will find a tool that will automate the process of compacting and repairing all of the databases within the Simon system, of which there are many. These databases can become bloated over time and should be compacted occasionally. This will improve performance and reduce the size of these databases significantly.



Also, if you should run into a problem where Simon is telling you that you have a database of an 'unrecognized database format', you will be able to use this tool to repair the offending database.

Once you have the Database Compact and Repair Tool opened, you should select the database you want to compact and repair from the list of databases shown in the illustration at bullet A. Then, click on the button at bullet B to compact and repair the database. Lastly, you can click on the button at bullet C to see how much the tool compacted the database, but this step is options since all it really does is find the database and check its size. Now, if you need more information



on how to use the tool, you can read the statement at the bottom of the form and also click on the question mark button to bring up a help screen.

Now, lets look at some of the changes made at revision 3.07.00. Remember, there were a lot of minor adjustments that I will not discuss here. Most of which will be unnoticeable to the user anyway.

Probably the most noticeable change will be the Boxholder Information form, which has changed considerably. The Boxholder Information form is a great

place to make adjustments to the information about your boxholders. Most of the major operations, such as opening a new boxholder, making payments, etc. But, the Boxholder Information form is an integral part of Simon since minor boxholder adjustments are inevitable.

You can open the Boxholder Information form by clicking on the second button from the left on the button bar at the top of the Simon window. When the form opens, you will see a form that looks like the form shown above. Of course, the client that appears will be one you recognize and the list of clients will be different.

The first thing you will do here is choose a client to work with. You will notice that the area where you make a client choice is much larger (not just a little yellow area at the bottom. You still have the same tools to refine and sort the list, the list is just bigger.

Now, this list will disappear when you click on a section in the list box shown at bullet A in the illustration. This is are the many areas of interest regarding the client you choose. The first item on the list, [Find Boxholder], is where you select the boxholder from the list as shown in the illustration.

Also, notice the new button at the top as shown near bullet C. By clicking this button, a calendar will appear where you can choose a date to replace the date in the [Open Date] box.

Even though the Boxholder Information form looks different, it pretty much does the same things that it did before, with a few exceptions.

There is a new area that can be found in the bullet A area called [Restricted Mail]. This is the area

Boxholder Information (Current) Box Number: J-511 Rent Due: Sunday, June 25, 2006

First: **Zane** Telephone: **480-555-4304** Open Date: **May 25, 2005**

Middle:

Last: **Taylor**

Status: **Open--With Forwarding**

Select area of interest... **Boxholder Restricted Mail**

Will this boxholder accept restricted mail at your business under the boxholder's name?

Spouse Restricted Mail

Will the boxholder's spouse accept restricted mail under this name?

Other Names Used Restricted Mail

Select Name from List

Paula Taylor, Daughter	Yes	Paula Taylor, Daughter
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Will restricted mail be allowed under this name?

Form 1583, Box 5 Entry

5. This authorization is extended to include restricted delivery mail for the undersigned(s)

Zane Taylor, Boxholder; Paula Taylor, Daughter

Boxholder Information (Current) Box Number: J-511 Rent Due: Sunday, June 25, 2006

First: **Zane** Telephone: **480-555-4304** Open Date: **May 25, 2005**

Middle:

Last: **Taylor**

Status: **Open--With Forwarding**

Select area of interest... **History**

History Description: **OPEN: 13 months.**

Date: **Wednesday, May 25, 2005**

Select history listing...

5/25/2005	M/F: AZ Sales Tax	
5/25/2005	FORWARD: Mail sent. (taxable)	
5/25/2005	M/R: AZ Sales Tax	
5/25/2005	FORWARD: Initial deposit.	
5/25/2005	FORWARD: Mail forwarding fee.	
5/25/2005	FUNDS: Mailbox Rental Setup fee.	
5/25/2005	OPEN: 13 months.	
6/9/2005	DUE: Mail forwarding.	Sent
6/9/2005	DUE: Mail forwarding.	
6/25/2006	DUE: Mailbox rent.	

Funds

	This Item	Totals
Mailbox Rental		
Fees	\$38.00	\$124.35
Deposits	\$0.00	\$0.00
Mail Forwarding		
Funds	\$0.00	\$40.00
Costs	\$0.00	\$15.17

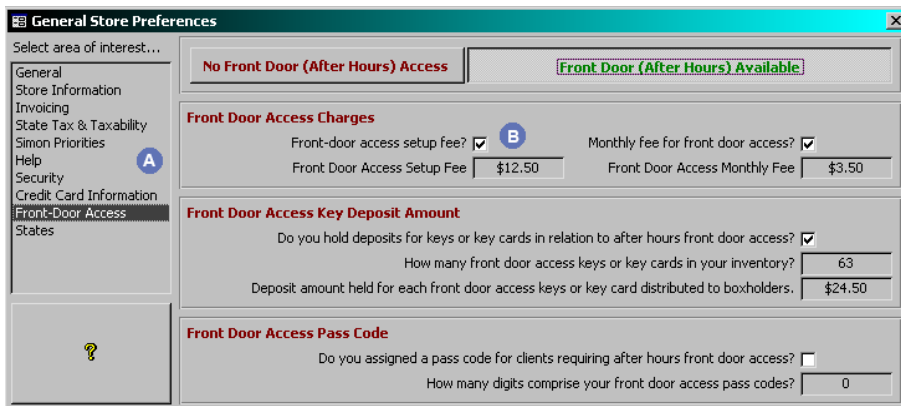
Status

where you should set whether a boxholder, spouse, or other names used, has authorized your business to accept restrict mail for that name.

Just check the check boxes that appear here to note that you do have authorization to receive restricted mail for the boxholder, spouse, or a specific other name. The names that will appear on the 1583 in box 5 are shown at the bottom of this area. See, illustration.

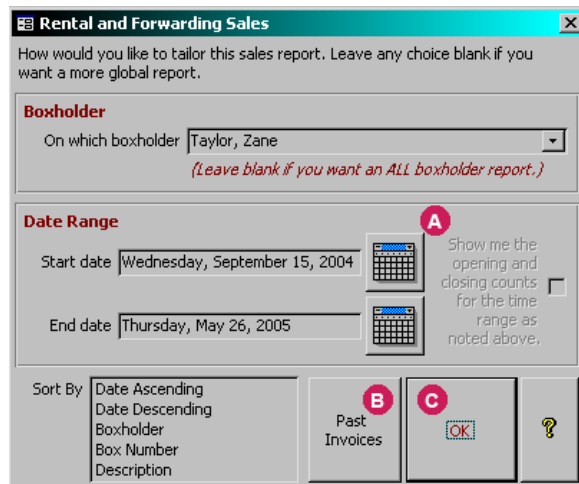
Another area on the Boxholder Information form that has changed quite a bit is the History area. This area is no longer simply a list of all of the history for a client. Now, what we have, is a list box showing the history listings. You will need to click on a history listing to see the funds for that history listing. Also, the funding categories that are disabled if funds should not be added to a specific box.

Lets look at the green bullets in the illustration. Bullet A is the list of areas that you can go to. Here, we are set to view the History area. Bullet B is a list of the history for the client, Zane Taylor. Bullet C is the Funds area. Note that only the Fees area is enabled, the other areas are disabled. The reason for this is that the [OPEN: 13 months.] history item is a mailbox rental fee area-not deposits or anything mail forwarding. Also note that the total funds collected and used are listed along the right edge of the Funds box. Bullet D is a calendar that can be used to change the [Date] box directly above the calendar button. Bullet E is a button that can be clicked to open the history listing that is selected in the history list. The form that will open when this button is click shows all of the history information collected for the history listing (there is a lot more information collected than just what is shown on the Boxholder Information form).



The Front-Door Access area of the General Store Preference area has changed somewhat. There is now a fee that can be charged when you open a box for someone who wants front-door access. This is a one-time fee and will not be charge except when the box is opened. This was requested by several clients. Well, here it is. See, bullet B.

By the way, since I had to modify this form, I decided to create a list to make area choices, rather than using the old tabbed control. This is a style choice I have made in several of our software titles that seems



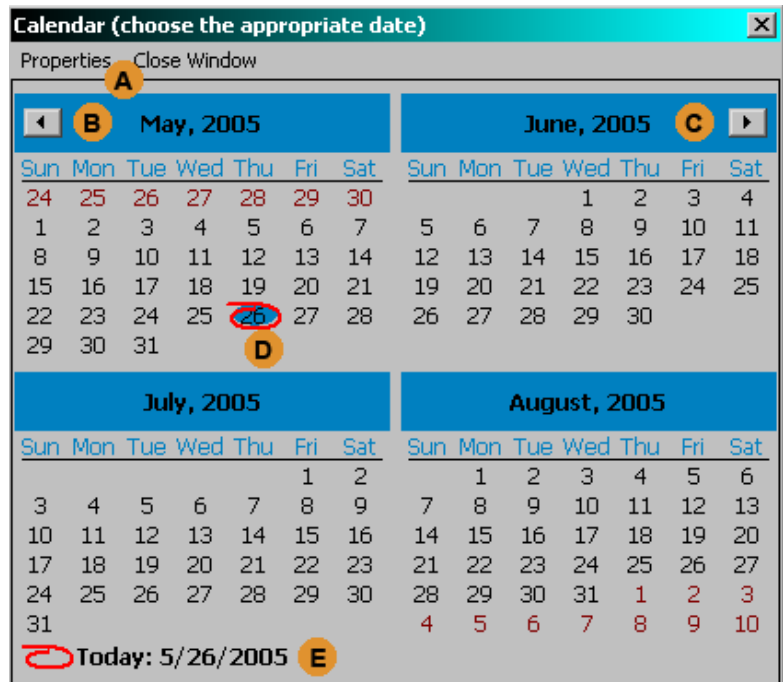
very popular and quite easy to use and understand. It takes up less room and looks cleaner. See, bullet A.

The Rental and Forwarding Sales form has changed design, but the features are unchanged. You can choose to print sales reports for individual clients, all clients, in sort orders as listed in the illustration and within a date range and, on some reports, you can also get a listing of how many boxes were opened during the date range.

Let's look at the red bullets. Bullet A shows two calendars that can be opened to change the Start date and the End date boxes. By the way, this calendar system is replacing the old embedded calendars that quite a few people were having problems with. This should cure all calendar problems. And, as an added benefit, the calendar that can be opened by clicking the calendar buttons is easy for you to define in a way you want to calendar to appear. And, can be used more often by us on forms that would not have fit a calendar in the past.

This is a picture of the calendar. When you first open the calendar, it will not appear like this. The calendar you see will be a one-month calendar. You can easily change the calendar design by setting the properties for your calendar by changing items in the Property areas. See, illustration orange bullet A.

Let's look at the orange bullets. You can click on the button next to bullet B to move back. In the case of my calendar here, clicking the button once will move me back in 4-month blocks. You can click on the button next to bullet C to move forward. In the case of my calendar here, clicking the button once will move me forward in 4-month blocks. Bullet D shows today's date as it appears when you set the property to circle today's date. You can also have today's date appear along the bottom. See, bullet E.



I will not be adding illustrations here, but the 'Add New Boxholder' wizard has been changed. The new look spreads out the information a bit so that it is not so cluttered. I think everyone will appreciate the beauty of the new 'Add New Boxholder' wizard.

I hope this helps.