

Simon Boxholder Builder Information

This article was written at Simon revision 3.07.02 on July 27-28, 2005. It is possible that, in the future, this Boxholder Builder tool will change somewhat. So, the screen captures and maybe even the instructions may not be entirely up to date. In any event, this article will still be quite helpful.

The Boxholder Builder is a tool that you can use to enter information about your boxholders. Unlike the Boxholder Wizard, the Boxholder Builder is used primarily when you want to get your people into Simon fast (for instance, when you first start using Simon and want to just get your people into the system).

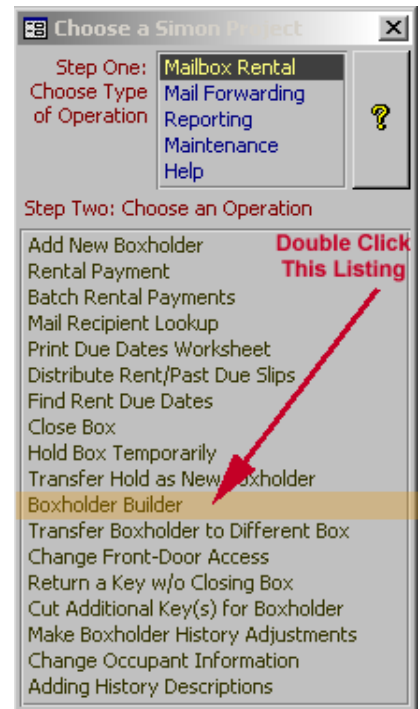
Under normal conditions, after you have all of your past clients listed in Simon, you will want to use the Boxholder Wizard to enter your new boxholders since there is a lot more functionality in this tool and the information gathered about the client is complete.

The Boxholder Builder is about as close as we could come to creating a way to import your data from other mailbox rental programs into Simon. We regret this. You see, if the other mailbox rental programs were built the same way as Simon, we could write code to import in your data. However, none of the other mailbox rental programs come close to the sophistication of Simon and the data kept for these other programs does not meet our demanding requirements on how mailbox and mail forwarding data should be kept. For instance, the other programs do not keep transaction history for your clients. This would seem to me to be essential, but the other programs are just not capable of this. Thus, it would be impossible to import such flawed data into Simon. The Boxholder Builder, however, should help you enter your client data fast and efficiently.

This document will only deal with usage of the Boxholder Builder. Frankly, the Boxholder Wizard is self-explanatory and thus does not need to be reviewed. Maybe I will write a separate article regarding the Wizard in the future. I would like to do this very much.

This document also assumes that you have all of your preferences set. This includes your mailbox pricing and your mailbox list. Setting your preferences is essential.

When you opened Simon for the first time, the Preference Wizard was started and would allow you access to all preferences necessary to operate Simon in a meaningful way. There are a lot of preferences to set and Simon is very helpful in this process. If you want to run the Preference Wizard again you can click on the first button from the left (the Simon Helper), go to the [Maintenance] area and double click on [Quick Setup]. Be sure to click on the buttons that lead to the mailbox pricing area and the mailbox number setup area. You can also review your preference settings by clicking on the [Preferences] menu item, choosing [Preferences] from the list and visiting the three areas listed there.



Now, let's look at the Boxholder Builder, and let's enter some people into your Simon program. Now, I am going to use fake names. You can add your people using the methods I will simulate here.

Click on the first button to the left on the button bar at the top. Double click the Boxholder Builder from the task list.

First, let's analyze the Boxholder Builder form by viewing the screen capture.

In the orange box you will see three buttons that move you to three different areas where you will have to enter data about a client. The first area is the one you see in the first screen capture. Here, you will want to enter the name of the client, the telephone number (optional), the box status and trust money if it is a mail forwarding client.

Along the right edge of the form there are two buttons. The top button will allow you to close this form. If you have all of the required information entered for a client, this client information will be recorded and you can either close the Boxholder Builder or start a new boxholder record. The second button is a help file that will tell you a lot of what is being written here, but without the pretty pictures.

In the yellow area at the bottom of the form, you will see a message that will help guide you through the process of entered client data. The text will turn green when you have entered the necessary information for Simon to finalize the record.

Go ahead and enter client data for Step 1: Boxholder Information & Box Status.

First Name: **Paula** (as suggested above, you may want to just add a client rather than using the information I am using here.)

Last Name: **Gundsfeld**

Telephone Number: **480-555-3943**

Status: **Open--No Forwarding** (this means that the box is presently open and they do not need your mail forwarding services.)

Every item you enter will change the contents of the yellow box. Like I said above, when you finally have enough information for Simon to finalize this client's record, the text will change to green and you will be told that your information is complete for this client.

Now, click on the [Step 2: Box Number & Key/Combination Information] button. This will move you to Step 2 (the area in the middle of the form will change to show box information).

This area allows you to set up the box for the client. Some of the information will only be available under certain conditions. For instance the Number of Keys Returned area is only available if the box status you choose in Step 1 is a close status.

Now, let's enter information regarding a box.

First, drop down the list of boxes and choose a box from the list. Please do not just type in the box number since Simon is aware of which boxes are already rented and will not allow you to rent a box that is already rented. Second, if you have given this client keys, enter the number of keys for Simon can record this information. You can also add front door access information based on preference settings you have for front door access. This will vary based on your front door access situation.

Once you have entered information in all of the boxes in this step you are ready to move to the next step. By the way, the [Key #] field is optional.

The screenshot shows the 'Boxholder Builder (Minimal Information Gatherer)' interface. On the left, there are three step buttons: 'Step 1: Boxholder Information & Box Status' (highlighted in orange), 'Step 2: Box Number & Key/Combination Information' (highlighted in orange), and 'Step 3: Important Dates & Usage Level'. Below the buttons is a cartoon character of a man in a red jacket and sunglasses. The main form area contains the following fields:

- Box Number:** A dropdown menu showing 'A-118' and a 'Size 5' label.
- Keys/Combination:** Fields for 'Mailbox:', '# of Keys' (set to 2), and 'Key #' (set to K787).
- Front Door Access:** A checkbox labeled 'Client has 24-Hour Front Door Access to Business' which is checked. Below it is a '# of Keys' field set to 2.
- Number of Keys Returned:** Fields for 'Mailbox Keys' (set to 0) and 'Front Door Access' (set to 0).

At the bottom of the form, a yellow banner reads: 'More information is needed about Paula Gundsfeld before Simon can save this information.' On the right side, there is a vertical button labeled 'Add Another Boxholder or Close' and a question mark icon at the bottom.

Now, click on the [Step 3: Important Dates & Usage Level] button. This will move you to Step 3 (the area in the middle of the form will change to show box information).

Enter the date when this box was first opened for this client and the date when the box rents are next due.

Also enter the usage level if you are using different usage levels for your box rentals. You will know what this is all about if you had set your preferences using the Setup Wizard. Once you have entered all of the data mentioned above for this type of box status, you will have finished this client. Notice at the bottom

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- Important Dates:** Fields for 'Date Box Originally Opened' (Saturday, July 13, 2002), 'Next/Most Current Due Date' (Wednesday, July 13, 2005), and 'Date Box Closed'.
- Usage Level with Example of Fees:** A dropdown menu for 'Usage Level' with 'Standard Usage' selected. To the right is a table titled 'Mailbox Rental Fees':

Duration	Fee
24 Months (2 free).	\$62.00
12 Months (1 free).	\$48.00
6 Months.	\$26.00

At the bottom of the form, a yellow banner reads: 'Paula Gundsfeld's record is complete. Simon will now be able to track this client for you. If you want to add more information about this client, use the Boxholder Information form after finishing with the Boxholder Builder. You should now click on the 'Add Another Boxholder or Close' button to either add another boxholder, or close this Boxholder Builder.' On the right side, there is a vertical button labeled 'Add Another Boxholder or Close' and a question mark icon at the bottom.

of the Boxholder Builder, the text message changes to green and tells you that all necessary information has been entered and that you are ready to start a new boxholder, or close.

Click on the [Add Another Boxholder or Close] button. A message will appear asking if you want to do another or close the Boxholder Builder. Close the Boxholder Builder.

Pretty simple, huh?!?

Now, let's click on the second button from the left at the top of the Simon window. This brings up the Boxholder Information form.

You can use the find tool to locate the client you just entered. Then you can choose an item listed in the [Select area of interest...] list to show you information about this client. As you will see, the information for this client is quite incomplete. The Boxholder Builder does not gather much information (just what is necessary to get you started). You can add information about this client using this Boxholder Information form. For instance, if you want to add address information for this client, you can add it here.

Customer Name	Box Number	Status
Brown, Jim	A-108	Open--No Forwarding
Brown, John	A-117	Open--No Forwarding
Brown, William	D-249	Open--No Forwarding
Gundsfield, Paula	A-118	Open--No Forwarding
Johnson, Randy	E-303	Open--No Forwarding
Lansdorf, Kenneth	A-114	Open--No Forwarding
Pepper, Waldo--Pepper Farms	H-439	Open--No Forwarding
Sawyer, Wanda	A-116	Open--No Forwarding
Taylor, Zane	J-511	Open--With Forwarding

Pretty amazing stuff, huh?!?