

Simon Boxholder Information Form

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 Information form is one of the most useful single forms within Simon. This area can be used to make changes to a boxholder's information. Most of the information for a boxholder can be changed here. The exception is information that requires the exchange of money, or information that will change the overall status of a boxholder. For these exceptions, there are wizard operations that you should use. For instance, if you want to give an additional key to a boxholder, you will want to use the wizard build for this operation, namely, the [Cut Additional Key(s) for Boxholder] wizard.

This article will only deal with the Boxholder Information form, however. To open this form, you will click on the second button from the left on the Simon button bar. There are other ways to open this form, but this is the most convenient. By the way, the Boxholder Information form will not open if you do not have at least one boxholder client entered in the system. You see, the Boxholder Information form is not meant as a way to add boxholders to the Simon system. Only as a way to edit existing information. Thus, there is no reason to open this form if you do not have at least one boxholder to edit.

Find Boxholder	Sort by	Refine
Brown, Jim	A-108	Open--No Forwarding
Lansdorf, Kenneth	A-114	Open--No Forwarding
Sawyer, Wanda	A-116	Open--No Forwarding
Brown, John	A-117	Open--No Forwarding
Gundsfield, Paula	A-118	Open--No Forwarding
Brown, William	D-249	Open--No Forwarding
Johnson, Randy	E-303	Open--No Forwarding
Pepper, Waldo--Pepper Farms	H-439	Open--No Forwarding
Taylor, Zane	J-511	Open--With Forwarding

If you have a client in the Simon system, open the Boxholder Information form.

At the top of the Boxholder Information you will see the name of the boxholder, telephone number, date opened and the status of the box. You can edit all of these items except the status of the box. Changing the status of the box may require additional fees, so you cannot change this here. Also, at the top are several buttons. The two buttons (at the top) to the farthest left allow you to view current box rentals and closed (archived) box rentals. If you do not have any archived records, this button will not be available.

The trash can button can be used to delete a boxholders record. We recommend that you only delete records when necessary. Closing a box can be done using the close wizard tool and should be done this way, rather than through deletion. This way, a closed boxholder's record will still exist in the archive area and will never be deleted.

If you click the calendar button a calendar will appear. This calendar can be used to change the date a box was opened. This will not change the history listings for the boxholder, only the date listed directly above the button.

The yellow question mark button can be clicked to bring up help for the usage of this form.

The [Select area of interest...] list is used to navigate through the information for a boxholder and to open the area to find boxholders, and print forms for boxholders such as the 1583, box labels, etc. We will use this list in a few minutes to look at client data for a specific client.

To the right of the list is the area that will change depending on which item in the list is selected. In the case as shown in the screen capture above, you see the [Find Boxholder] area. All of your boxholders will be listed here. If you click on a client listing here, their record will appear. You can change the way the list is sorted by either clicking the [Customer Name] button or the [Box Number] button. If you list is extremely long, you can also refine the list to only show what appears in the [Refine] box. Simply enter something in the [Refine] box and then hit the Tab key on your keyboard to active the refinement. The list will then only show records that contain the [Refine] box phrase.

Choose a boxholder from the list so we can go view the information for that boxholder.

Now, click on the [Home Address] listing in the [Select area of interest...] list.

The area to the right of the list should now show the home address, home communications and note boxes. All of this information can be edited. Most of this information is necessary if you plan to create a 1583 form for this client.

The note field at the bottom of this area can be used to make remarks about this client. This information is not used on the 1583 form.

Now, click on the [Addressing] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

On occasion you will need to contact a client by mail, or create mailing labels for a client. If you will be sending mail to a client, or creating mailing labels for a client, you will want to make sure the stuff in this area is entered correctly.

Add a check in the first check box to show the boxholder's name with the home address when addressing to a client.

If you check the second check box, you will be adding the boxholder's company name and changing the address to the business address.

The two boxes below the Addressing area shows how addressing will look to the boxholder's given address, and the address as shown using your box addressing.

Now, click on the [Other Names] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

The screenshot shows a software window titled "Boxholder Information (Current)" with a subtitle "Box Number: H-439 Rent Due: Sunday, June 25, 2006". The main area displays the boxholder's details: First name "Waldo", Telephone "480-555-4934", Open Date "May 25, 2005", Middle name (empty), Last name "Pepper", and Status "Open--No Forwarding". Below this are buttons for "Current Box Rentals", "Closed (Archived) Box Rentals", a trash can icon, a calendar icon, and a help icon. A "Select area of interest..." menu is open, listing options like "Find Boxholder", "Home Address", "Addressing", "Other Names", "Spouse", "Restricted Mail", "Box Information", "Front Door Access", "History", "Business Info", "Other Business Info", "Identification", "Credit Card Info", "Other Mail Recipients", and "Printable Forms". The "Other Names" section is active, showing a list of "Other names boxholder, spouse, children of the boxholder, or company use to receive mail?". A note states: "Do not add a company name to the same line as a person (keep them as separate records)". A "Select Name from List" box contains "Wally Pepper, BH AKA". To the right, there are input fields for "First" (Wally), "Middle", "Last" (Pepper), and "Description" (BH AKA). A checked checkbox indicates "Restricted mail accepted under this name." Below these is a "Company" field and a trash can icon. At the bottom, it says "Other names as shown Wally Pepper, BH AKA on postal 1583:".

If you are familiar with the Domestic Mail Manual's (DMM) requirements for doing a mailbox rental business, you will know that you are allowed to add a boxholder's spouse and children to a boxholder's 1583 form. This area allows you to add the children's names to the boxholder's box. There are no limitations to the number of other names you can add here. You can also use this area to add aliases that a boxholder might be receiving mail under. You can also use this area to add aliases that the boxholder's spouse might be receiving mail under.

Add the other name, a description of the person (i.e., BH AKA, Spouse AKA, minor child).

You can add other company names here as well.

You can also note by checking in the restricted mail check box that restricted mail can be received under this name.

If you want to add names to the list, you should first click on the pencil button. If you want to delete a listing, make sure the listing is selected in the list and then click on the trash can button.

Now, click on the [Spouse] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

If the spouse of the boxholder will be receiving mail in this box, you will want to list the spouse here. Enter the spouse's name in it entirety (do not leave the last name off just because you think it is unnecessary because the spouse is married to the boxholder. If you do this, it will be impossible for Simon to help you find this person when trying to figure which box a person's mail should be distributed to.

You should add identification information for the spouse in adherence to the Domestic Mail Manual.

The screenshot shows the 'Boxholder Information (Current)' window for Box Number H-439, with a rent due date of Sunday, June 25, 2006. The boxholder's name is Waldo Pepper, telephone 480-555-4934, and the open date is May 25, 2005. The status is 'Open--No Forwarding'. The 'Select area of interest...' list on the left includes 'Spouse' and 'Spouse Identification #1' and '#2'. The 'Spouse's Name' section has fields for First, Middle, and Last (Pepper). The 'Spouse Identification #1' section has an Identification # of 960568435, an expiration date of Wednesday, December 19, 2007, and a description of 'Driver's License'. The 'Spouse Identification #2' section has an Identification # of 34563456, an expiration date field, and a description of 'Armed Forces'.

You should add an expiration date for any identification that has such a date. You can use the calendar to choose this date or, of course, you can just type in the date.

Now, click on the [Restricted Mail] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

Simon needs to know if the boxholder, spouse or other names used will be able to receive restricted mail. In accordance to the DMM, the post office is not suppose to delivery restricted mail to your store for a client if they do not agree to receive such mail. The truth is that most post offices do not adhere to this. But, if you were to have a 'by the book' postmaster, you may run into problems if you do not set this up correctly.

The screenshot shows the 'Boxholder Information (Current)' window with the 'Restricted Mail' section selected. The 'Boxholder Restricted Mail' section has a checked box for 'Will this boxholder accept restricted mail at your business under the boxholder's name?'. The 'Spouse Restricted Mail' section has a checked box for 'Will the boxholder's spouse accept restricted mail under this name?'. The 'Other Names Used Restricted Mail' section has a table with one row: 'Wally Pepper, BH AKA' with a 'Yes' checkbox and the name 'Wally Pepper, BH AKA'. Below this is a checked box for 'Will restricted mail be allowed under this name?'. The 'Form 1583, Box 5 Entry' section has a text area with the text: '5. This authorization is extended to include restricted delivery mail for the undersigned(s) Waldo Pepper, Boxholder; Jill Pepper, Spouse; Wally Pepper, BH AKA'.

If you use the Boxholder Wizard to help you set information into the system, the wizard will help you pose questions to the boxholder who will probably be standing right in front of you.

Checks in the check boxes will tell Simon to allow restricted mail. When printing the 1583, note will be made for those who agree to receive restricted mail.

Now, click on the [Box Information] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

This area shows the box status, box number and size, access information, usage type and notices information. Most of this information cannot be changed. You can, however, change the usage type and the type of notice given to this client.

To change the box status you can use the close operations to do so. For instance, if you want to change the status to [Open-with Forwarding] you can change this status with the close operations. Other box status are closings and can be done there also.

The screenshot shows the 'Boxholder Information (Current)' window for Box Number H-439, with a rent due date of Sunday, June 25, 2006. The boxholder's name is Waldo Pepper, and the box is currently 'Open--No Forwarding'. The 'Box Status' section shows 'Open--No Forwarding'. The 'Box Number Information' section shows 'Number H-439' and 'Size X'. The 'Usage Type' is set to 'Business Usage', and the 'Mailbox Rental Fees' table is displayed below it. The 'Rent Due and Past Due Notices' section has a checked box for 'Check this box if boxholder will require past due and rent due letters sent through the mail, rather than mailbox-insertable slips.'

Duration	Fee
24 Months (2 free).	\$262.00
12 Months (1 free).	\$202.00
6 Months.	\$111.00

You can change the box number by transferring a boxholder to a different box. There is a wizard where you can do this. You can add or subtract keys using the appropriate wizards for this.

You can change the usage type by dropping down the usage type list and choosing a different usage type. The fees shown below the aqua area should change to different rates.

You can check or uncheck the rent due and past due notices check box to tell Simon that when rents are due, or past due, to give notice by slip, or by letter (and a slip).

The screenshot shows the 'Boxholder Information (Current)' window for Box Number H-439, with a rent due date of Sunday, June 25, 2006. The boxholder's name is Waldo Pepper, and the box is currently 'Open--No Forwarding'. The 'Front Door Access' section shows 'This boxholder uses this service?' checked and '# of Keys/Cards' set to 2.

Now, click on the [Front Door Access] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

This area shows the front door access situation you have set up for this client, if indeed you do front door access at your business.

You cannot change this information here. There is a wizard that you can use to change this information.

Now, click on the [History] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

History is something that Simon does very well indeed. Every aspect of mailbox rental will appear in history.

If you give additional keys to a boxholder, entries will be made to history.

If you transfer a boxholder to a different box, entries will be made to history.

When a client makes payment of rents, entries will be made to history.

A list of all history for a boxholder will appear in the [Select history listing...] list. To look at a specific history item, click the listing in this list. The history will appear above and to the right. You can add and delete history by clicking the pencil and trash can buttons respectively.

There is more history information available, but most of the time you will not need to see it. If, however, you do need to see a more complete listing for a specific history listing, you can select the specific history item and then click on the [...] button.

Now, click on the [Business Info] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

If this boxholder is conducting business with the public, you should check the Yes check box.

You should also fill out the information for the business directly below. Most of this information is entered on the client's 1583 form.

Now, click on the [Other Business Info] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

If this boxholder is conducting business with the public, you should also enter the information on this page. This information is also entered on the client's 1583 form.

Now, click on the [Identification] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

The Domestic Mail Manual requires that you keep identification information for the boxholders who will be receiving mail at your business. One of the pieces of ID must be picture ID. And, you should also keep photocopies of the ID at your business.

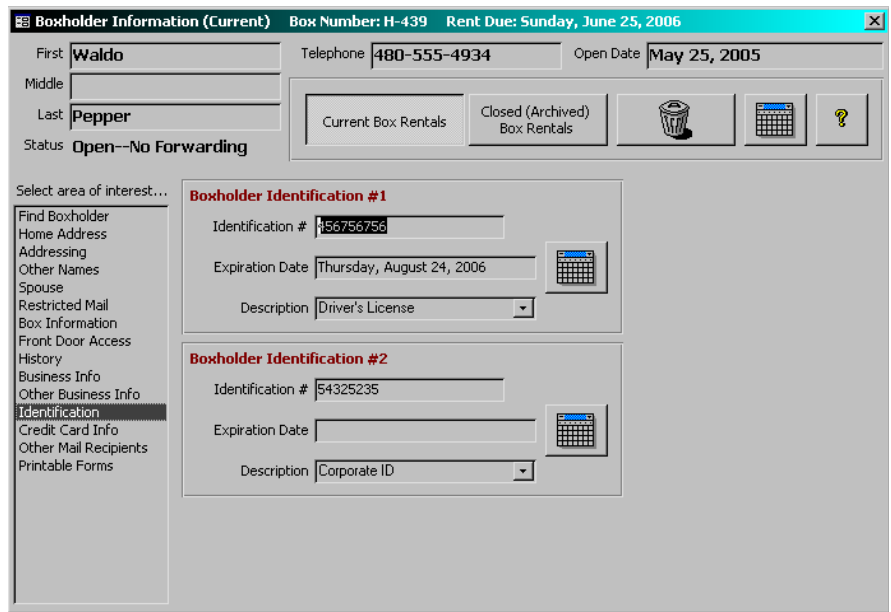
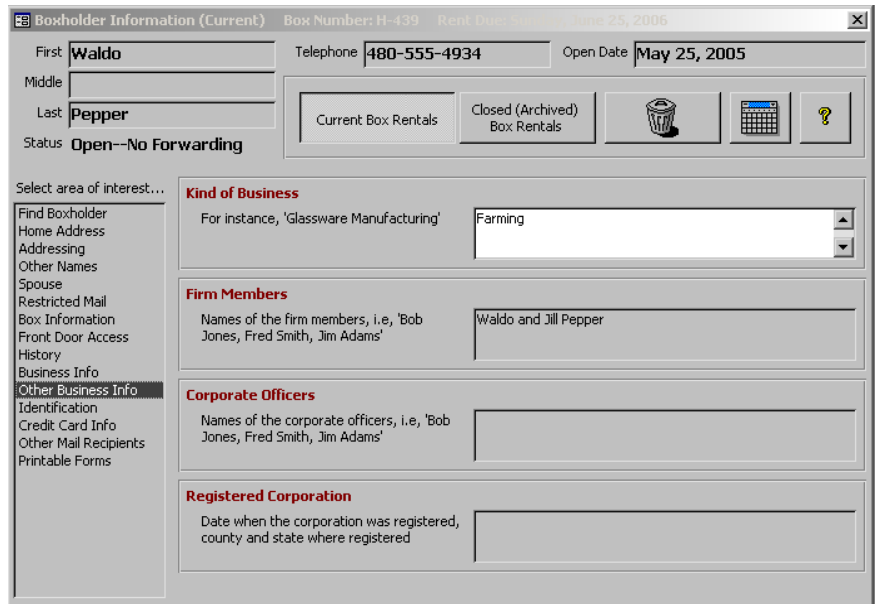
As you can see, there is room in this area for two pieces of identification. Enter the ID number, the expiration date, and the ID description for each piece of ID you take.

You can click on the calendar button to bring up a calendar where you can choose the expiration date from a calendar. The description field has a drop down list that you can use to choose the appropriate ID. This list is generated from a list in the preferences area that you can change if you want to remove or add different identification types that you want to accept at your business. Please be aware of what types of identification the post office will accept before you add to this list. The post office does not accept certain types of ID.

Now, click on the [Credit Card Info] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

This credit card information area is available if, for some reason, you need to keep a credit card number available for mailbox rental. You should enter the credit card type, credit card number and expiration date in this area. If this credit card will be used to pay future mailbox rent, you should check the check box here and enter the number of months that this client has authorized box rental when future rents are



due. And, if this client has given you any stipulations for use of this credit card, you should outline these stipulations in the Credit Card Usage Note box.

Now, click on the [Other Mail Recipients] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

The Domestic Mail Manual (DMM) states that the boxholder's spouse and children can be listed on the boxholder's 1583 form. Simon give ample room for this under 'Spouse' and 'Other Names.'

If, however, you have mail recipients for a box that are not members of the boxholder's immediate family, i.e., friends, business associates, family not a part of his or her immediate family, you should enter these people here. These people will require separate 1583 forms submitted to the postal service. If you add these people here, Simon will be able to generate the appropriate 1583s for these individuals.

As you can see in the screen capture, there is one other mail recipient in the sample mailbox. If you click on 'Harry Dennison', a form will appear showing his specific rental record. This record is subordinate to the actual boxholder's record and, because Simon is so beautifully crafted, there is no limit to the number of other mail recipients you can have in this boxholder's box.

You can also add new 'other mail recipients' from the Boxholder Information area.

If you click on the pencil button, a new 'blank' record will appear where you can add the new 'other mail recipients' information.

Now, click on the [Printable Forms] listing in the [Select area of interest...] list.

The screenshot shows the 'Simon Boxholder Information (Current)' window for Box Number H-439, with a rent due date of Sunday, June 25, 2006. The boxholder's name is Waldo Pepper, with a telephone number of 480-555-4934 and an open date of May 25, 2005. The status is 'Open--No Forwarding'. The 'Select area of interest...' list on the left includes 'Credit Card Info', which is currently selected. The main content area is divided into two sections: 'Credit Card Information' and 'Credit Card Used to Pay Mailbox Rent'. The 'Credit Card Information' section has fields for 'Credit Card Type', 'Credit Card Number', and 'Credit Card Expiration Date' (with an example of 1107). The 'Credit Card Used to Pay Mailbox Rent' section includes a checkbox for 'Check this box if we have permission to automatically charge their credit card when box rents become due.', a field for 'How many months will you be charging for when rent comes due in the future?', and a 'Credit Card Usage Note' field.

This screenshot shows the same 'Simon Boxholder Information (Current)' window, but with 'Other Mail Recipients' selected in the 'Select area of interest...' list. The 'Other Mail Recipients' section displays a list with one entry: 'Harry Dennison'. To the right of the list is a text area containing a note: 'The Domestic Mail Manual (DMM) states that the boxholder's spouse and children can be listed on the boxholder's 1583 form. Simon gives ample room for this under "Spouse" and "Other Names." On the other hand, other mail recipients are those people who will be receiving mail in this specific mail box who are not a part of the boxholder's immediate family, i.e., friends, business partners, non-immediate family members. These people will require separate 1583 forms submitted to the postal service. If you add 'em here, Simon will be able to generate the appropriate 1583s for 'em.' A pencil icon is visible next to the text area, indicating that a new record can be added.

There are a lot of forms that you can print relative to your boxholders. In this area a few of the more important forms are listed and are printable right from here.

Form 1583. If you edit boxholder information using this Boxholder Information form, you can create a new 1583 for this client by clicking on the first button in this area. This Form 1583 will incorporate any new information you have added before printing this form.

Address Labels. You can create address labels for your clients here also. This address label is printed on a 1 inch by 2.6 inch Avery-type address label form. They are nice for return addresses. There is also a marketing note that you can put in the boxholder box, along with the nice address label sheet that might help generate some additional revenue for future address label sheets the client might request.

Mailbox Label. This is a label you can attach to the back of the mailbox to help whomever is sorting and distributing mail find the correct box for distribution. There are instructions on the mailbox label form on how to attach it to the box.

Rental Agreement. You can produce a rental agreement for boxholders. This rental agreement uses phrases that you can modify using the Mailbox Rental Agreement Phrase Editor that can be found by clicking on the Forms & Reports menu, Mailbox Rental Agreement, Phrase Editor.

Credit Card Authorization. This is a form that you should have clients sign if they are authorizing the use of a credit card to pay for future mailbox rental payments by credit card.

The screenshot shows a software window titled "Boxholder Information (Current)" with a box number of J-511 and a rent due date of Sunday, June 25, 2006. The form contains the following information:

- First Name: Zane, Middle: [blank], Last Name: Taylor
- Telephone: 480-555-4304, Open Date: May 25, 2005
- Status: Open--With Forwarding
- Buttons: Current Box Rentals, Closed (Archived) Box Rentals, [trash icon], [calendar icon], [help icon]
- Left sidebar menu: Find Boxholder, Home Address, Addressing, Other Names, Spouse, Restricted Mail, Box Information, Front Door Access, History, Business Info, Other Business Info, Identification, Credit Card Info, Other Mail Recipients, Mail Forwarding (highlighted), More Mail Forwarding, Mail Forwarding Detail, Printable Forms
- Mail Forwarding Addressing section: Send To: First (Zane), Middle ([blank]), Last (Taylor); Company ([blank]); Street Address (4484 SW 155th Street); Postal Code (85201), City (Mesa), State (AZ); Country (USA)
- Mail Forwarding Communications section: Telephone (480-555-4304), Facsimile ([blank]), Email ([blank])
- Addressing section: How will this client's address appear when doing invoices and other documents. Use Name, Use Company Name
- How address will appear section: Zane Taylor, 4484 SW 155th Street, Mesa, AZ 85201

There are three additional areas that we have not yet discussed. These three areas will only appear if the boxholder is set up to use your mail forwarding services (status is set to 'Open-with Forwarding').

If you have a mail forwarding client, you can click on 'Find Boxholder', and click on this mail forwarding client. Now, you will see these three areas appear in the list.

Now, click on the [Mail Forwarding] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

The Mail Forwarding Address listed here will be the address where you will be sending/forwarding this client's mail.

Will also want to add communications information here as well. This is handy if you need to contact this client at the address where the mail is to be sent. As you are aware, mail forwarding is often done when a client is out of the area and not at their local address. You will need to be able to communicate with this client occasionally.

You can set whether to use a company name, or client name, or both when addressing the mail forwarding package.

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...

- Find Boxholder
- Home Address
- Addressing
- Other Names
- Spouse
- Restricted Mail
- Box Information
- Front Door Access
- History
- Business Info
- Other Business Info
- Identification
- Credit Card Info
- Other Mail Recipients
- Mail Forwarding
- More Mail Forwarding**
- Mail Forwarding Detail
- Printable Forms

Mail Forwarding Service Started Wednesday, May 25, 2005

Mail Forwarding Frequency **Twice a Month**

Credit Card Funding

Card Type: Check here if you have permission to do each mail forwarding event by credit card.

Number:

Expiration: example: 1107

Forwarding Orders:

Trust Funding

Initial Deposit	\$40.00	Typical Deposit	\$40.00	Available Funds	\$21.33
		Minimum Balance	\$10.00		

The address as it will appear on the mail forwarding package label will appear in the bottom, right corner of this area.

Now, click on the [More Mail Forwarding] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

This area shows the date when mail forwarding services were started. This date can be modified by clicking on the calendar button to reset the date.

Reminders for mail forwarding are generated based on the mail forwarding frequency you set in the Mail Forwarding Frequency box. Simply put, when you do a mail forwarding event for this client, Simon will look at the frequency and then set the next date for mail forwarding to a date at the appropriate interval in the future. The exception is when you set the frequency to 'will call' or 'when necessary', in which case Simon sets a date in the future beyond the norm just because Simon figures that you will need notice in the event this client is ignored for an extended period of time.

If mail forwarding will be accomplished with payment done by credit card, you should let Simon know this. You can check the appropriate check box, enter the credit card information, and any forwarding orders (i.e., no bulk mail). Simon will then not keep track of mail forwarding funds in lieu of the credit card information you provide.

If, on the other hand, you are being sent funds for mail forwarding, you should make arrangements with the client for funding in the area at the bottom of this area. Simon will keep track of what has been spent and when deposits are made to mail forwarding funding.

Now, click on the [Mail Forwarding Detail] listing in the [Select area of interest...] list.

The area to the right of the list should change to what appears in the screen capture.

Simon keeps track of your mail forwarding event transactions. This area shows all of the supplies, services and fees associated with each mail forwarding event.

You can click on an item in the list to see exactly how this item effects the funding.

You can add new listings here and delete listings as well.

When mail forwarding events are done, a listing for the mail forwarding event is added to the regular box history as well. The difference is that this listing is itemized, the 'History' listing is cumulative.

There is a lot of information that Simon gathers for you. Actually, you have to type most of it in, but Simon does help a bit.

The Boxholder Information form is primarily used when you have added a new client using the Boxholder Builder, or the Boxholder Wizard, and then, maybe later on, you need to make changes to a client's information. The Boxholder Information form is also a great place to review a client's information, or just to get, say, a phone number so you can call them. In any event, it would be a good idea to familiarize yourself with this form.

The screenshot shows a software window titled "Boxholder Information (Current)" with a subtitle "Box Number: J-511 Rent Due: Sunday, June 25, 2006". The window is divided into several sections:

- Client Information:** Fields for First Name (Zane), Middle, Last Name (Taylor), Telephone (480-555-4304), and Open Date (May 25, 2005). The status is "Open--With Forwarding".
- Navigation:** Buttons for "Current Box Rentals", "Closed (Archived) Box Rentals", and icons for a trash can, calendar, and help.
- Select area of interest...:** A list of menu items including "Find Boxholder", "Home Address", "Addressing", "Other Names", "Spouse", "Restricted Mail", "Box Information", "Front Door Access", "History", "Business Info", "Other Business Info", "Identification", "Credit Card Info", "Other Mail Recipients", "Mail Forwarding", "More Mail Forwarding", "Mail Forwarding Detail" (highlighted), and "Printable Forms".
- Mail Forwarding History:** A table showing a list of transactions. The description is "FUNDS: Initial Deposit" and the date is "Wednesday, May 25, 2005".
- Funds Summary:** A table showing the cumulative effect of the transactions on the funds.

Select forwarding history to view...	
5/25/2005	M/F: AZ Sales Tax
5/25/2005	SERVICES: E-Mail
5/25/2005	SUPPLIES: Box
5/25/2005	SHIPPING: UPS Ground
5/25/2005	SERVICES: Forwarding Service Charge
5/25/2005	FUNDS: Initial Deposit
6/17/2005	SHIPPING: USPS First Class
6/17/2005	SERVICES: Forwarding Service Charge

Funds	This Item	Totals
Mail Forward Charge	\$0.00	\$18.67
Mail Forward Funds	\$40.00	\$40.00
Available Funds		\$21.33