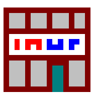
Simon Version 2 Information

Congratulations on downloading the finest mailbox rental and mail forwarding management system ever conceived. Simon is packed full of fine features and has more power than a speeding locomotive.

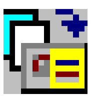
The following document contains all of the information that you need to get you going with Simon. Frankly, once you have your store's options set up in Simon, the rest of the Simon operations will be easy.

Setting Preferences.

Before you can do much of anything within Simon, you will need to set your store preferences, set mailbox rental pricing, and set up your box inventory. If you have any trouble understand what a particular option does, click on the yellow question mark button located on the tabbed page that you are working on to bring up a help screen that should answer your questions for you.



General Store Preferences. The image to the left shows the icon that you should click on the upper button bar to open the general store preferences area. The form that will appear has eight tabbed controls–General, Store Information, Invoicing, State Tax Rate & Taxability, Simon Priorities, Help, Security, and Credit Card Information. These are the options that you can set within Simon that are not specifically related to either mailbox rental and mail forwarding. For these two areas, we have separate preference areas as will be discussed below.



Mailbox Rental Store Preferences. The image to the left shows the icon that you should click on the upper button bar to open the mailbox rental store preferences area. The form that will appear has ten tabbed controls–Box Size/Type, Usage Level, Rental Duration, Mailbox Pricing, 1583A Info, Box Access & Fees, Identification Descriptions, Timings, Local Post Office, and Box Address. *See,* **Figure 3**. These are the options that you can set within Simon that are specifically related to mailbox rental. You will want to spend some time working with the options in this area as they are the most important to your store's mailbox rental system. For instance, you must make sure that you set your own box size/types, durations and the usage levels. Usage level is available, but you needn't use it. The standard usage level is set by default to Standard Usage and you may choose to just use this one usage level alone. Be this as it may, you do have the option of charging differently for boxholders who require more or less of your time. For instance, you can set up a business usage level whereby you can charge either more or less than someone who uses their box as a personal repository for their mail. Reciprocally, you

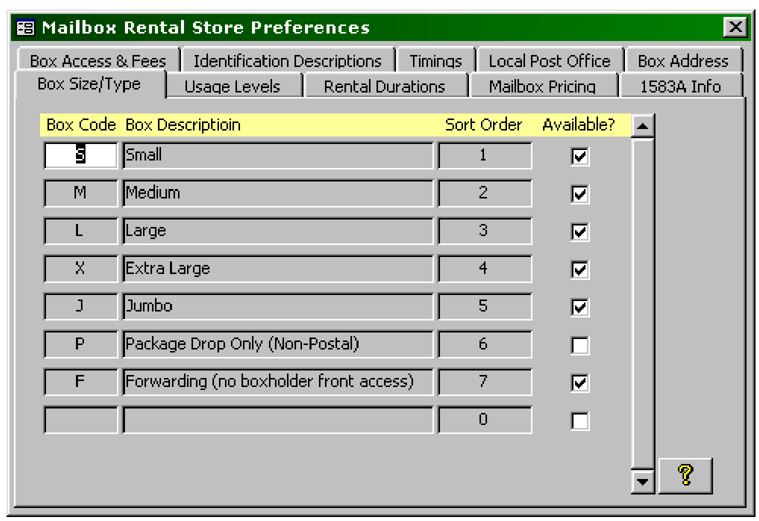
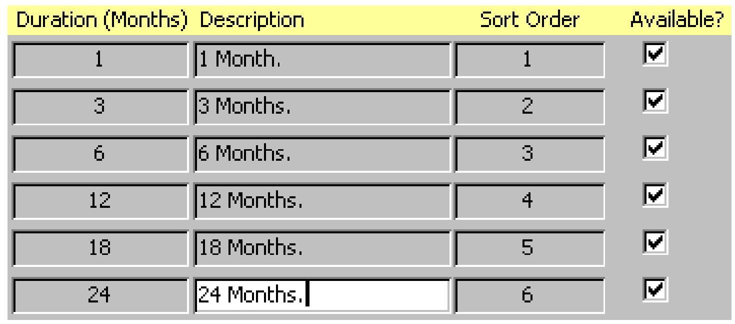


Figure 3. This page and the two following pages–Usage Levels and Rental Durations–are very important and must be done correctly before you can set your mailbox rental pricing structure.

may have someone who rents from you who does not get but a single piece of mail a year. You may want to cut this person some slack. Simon Version 2 can handle this for you.

In the Mailbox Rental Store Preferences area there are three tab controls where you can set the Box Size/Type, Usage Levels, and Rental Durations. After you have set these items for your purposes, you should go to Mailbox Pricing and select the button that will open a special mailbox pricing form. This form is a bit complicated to use but, after you get use to how it works, you will find it pretty simple.

Let’s take a hypothetical situation where we have all of the normal box sizes and an unusual box size we will call “Jumbo.” Go to the Mailbox Rental Store Preferences area, navigate to the Box Size/Type page and then create a new size type called “Jumbo.” *See,* **Figure 3**, to see an illustration of how you would create such a new box size. To create this new box size, place your cursor in the blank spaces under “Package Drop Only...”. Let’s add a box code of “J,” box description of “Jumbo,” sort order of 5 and change the sort numbers for “Forwarding...” and “Package Drop...” to 7 and 6 respectively, and set “Available?” as checked for “Forwarding...” and unchecked for “Package Drop...”. What this does for you is (1) sets a new box size called Jumbo, (2) makes “Package Drop...” unavailable as an option at your store, (3) changes the sort order so that Jumbo will appear in lists right below “Extra Large” and before “Forwarding...”.



Duration (Months)	Description	Sort Order	Available?
1	1 Month.	1	☑
3	3 Months.	2	☑
6	6 Months.	3	☑
12	12 Months.	4	☑
18	18 Months.	5	☑
24	24 Months.	6	☑

Figure 5. The standard durations set when Simon is first used is 1, 3, 6 and 12 months. We have set two new durations–18 and 24 months.

Let’s also go to the “Usage Levels” tab and check the “Business Usage” item as being available. Notice that there is one other check box relating to each usage level shown on this tabbed control page. This check box notes that one of the usage levels is set as the default value. Upon first using Simon, the default usage level is “Standard Usage.” What this means is that “Standard Usage” will be the options given when creating new boxholders. The default should be the usage level you will be using most often.

Finally, let’s add a new rental duration or two. Click on the “Rental Durations” tab, at the bottom of the list, after “12 Months.”, let’s add 18 months and 24 months. In the Duration field right below the 12, let’s type 18, in the Descriptions let‘s type “18 Months.” and Sort Order of 5 and check it as available. In the next line type 24, “24 Months.”, 6 as the sort order and make it available as well. *See, **Figure 5***. Now we should be able to set rates for jumbo boxes as either standard or business usage, with durations up to 24 months.

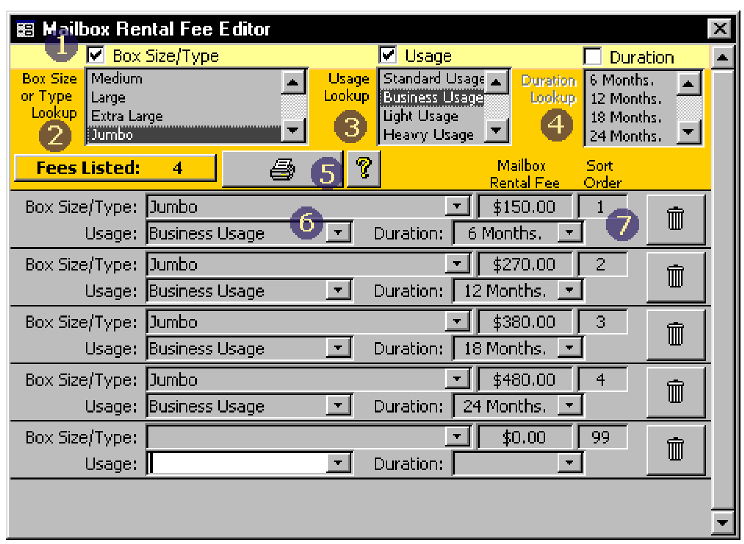


Figure 6. The Mailbox Rental Fee Editor is a bit complicated due to the complex nature of Simon mailbox rental pricing. Though this may be true now, once you get use to using this form, it will become easy.

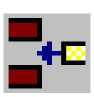
Mailbox Rental Pricing. As shown above, you must set up your box size/types, durations and usage levels before setting pricing. Once this information is set in the store preferences area, you are ready to set your rental pricing. Open the Mailbox Rental Fee Editor form by clicking on the **Preferences** menu item and choosing **Mailbox Rental Pricing**. The form as shown in **Figure 6** should appear. At the top of this form, in the yellow area adjacent to the bullet number 1, you will see check boxes that tell you which of the three lists will be available to make choices in. Let's say that you want to work on the Jumbo box rates fir business usage. Click on "Jumbo" in the first list as shown next to bullet 2, and click on "Business Usage" in the second list as shown next to bullet 3. Nothing will appear in the large grey area as no rates for the "Jumbo" box have been set yet.

Since these boxes are in great demand, we want to set only business usage rates for 6 through 24 months only.

In the Box Size/Type box type "j." Jumbo should appear without having to type the whole word. Tab down to the Usage box and type "b." Business Usage should appear without typing the whole phrase. Set the duration as 6 Months. Set the fee as $150.00, and the sort order as 1. We will do the same for the rest of the rates as shown in **Figure 6**. After doing all of this, you will have set rates for jumbo boxes for business users. Click on the printer button noted by bullet 5 to see all of the rates presently set up in your system. Close the Mailbox Rental Prices report by clicking on the close button at the top of the Simon window.

From the Mailbox Rental Fee Editor, you can also browse through the rates you have set for all of your box size/types, usages and durations simply by choosing what you want to see in the three list boxes at the top of the form in the gold area. For instance, click on small box size with standard usage using the first two list boxes. You will then see the prices for small boxes with standard usage. Easy enough.

Now, since we set rates for our "Jumbo" box, we will be able to add new boxholders and set them up in jumbo boxes and these rates will be used. Of course, you will have to have set jumbo boxes in your inventory of boxes.



Mailbox Inventory Setup. Since we do not have our "Jumbo" boxes physically set up within Simon, we will have to do so. The Box Number Creator can be found by clicking on the icon as shown to the left and then choosing the Box Number Creator as the tool of choice. As shown in **Figure 8**, the Box Number Creator is a rather busy form. This is how it works. Enter the box size/type in the box next to bullet 1. Drop down the list by clicking on the small down arrow button next to the box size window. Notice that "Jumbo" is there. This list is generated by the stuff you add in the Mailbox Rental Store Preferences area under the Box Size/Type tab. In this hypothetical situation, we need to add some "Jumbo" boxes to our box system so Simon will be able to rent them to our customers. In the box next to bullet 2 called "Lock Type," I have chosen combination lock entry as the lock type. You may not have combination locks on any of your boxes, but Simon can deal with combination locks just as well as key locks. Choose a starting number and an ending number in the boxes next to bullet 3. We will be adding a prefix to this number and we add this in the box next to bullet 4.

At the bottom of the screen, where bullet 5 is located, a preview message tells us that Simon will be creating Z type boxes with combination lock entry for numbers Z-2001 through Z-2040. If this is what you have in mind, click on the pencil button noted by bullet 6. If it is not correct, you can edit the stuff in the peach area again, or click on the button noted by bullet 7 to clear the settings.

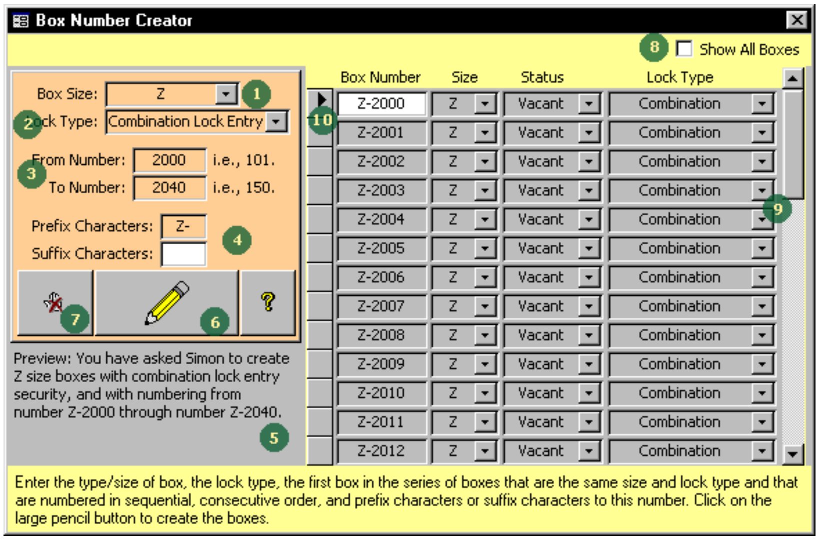
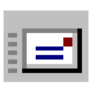
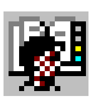


Figure 8. The Box Number Creator is a great tool for setting up your box numbers into the Simon system. Yes, Simon wants to know what boxes you have available so he can keep track of keys, warn you when your key tumblers need changing, or combinations need changing and which ones are occupied or vacant.

If you click on the pencil button, the list of new boxes will be generated and placed in the grey area. Review the list for correctness. You scroll up and down through the list using the scroll bar as noted by bullet 9. If anything is wrong, you can click on the small rectangle button next to the erroneous box (noted by bullet 10) and then hit the DELETE key on your keyboard to get rid of the problem box. If the boxes are correct, you can check the Show All Boxes check box (bullet 8) to show all boxes you have presently in the system.



Mail Forwarding Store Preferences. The image to the left shows the icon that you should click on the upper button bar to open the mail forwarding store preferences area. The form that will appear has two tabbed controls–Mail Forwarding, and More Mail Forwarding. These are the options that you can set within Simon that are specifically related to mail forwarding.



Adding Boxholders. Simon has two tools for adding boxholders to the system. One, is typically used when first creating your boxholder database because it is easy to use and does not require all of the data that would be needed by Simon to keep track of boxholder stuff. In fact, the boxholder builder was initially created so that new users to the Simon system could easily add their many current boxholders without having to spend an inordinate amount of time doing so.

The other tool is a wizard-like tool that will walk the user step by step through the process of adding boxholder information. This tool is best used in the normal operation of your mailbox rental business. Most certainly with new boxholders that you are just establishing in the Simon system. The advantages of this wizard-like tool is that it creates exact history and payment information and allows you to print invoices, 1583s, mailing labels and rear box tags, and all sorts of neat documents–things that the Boxholder Builder just does not do.

Boxholder Builder. What minimum amount of information do I need to setup my present boxholders? The items as shown in **Figure 11** should be filled in except the ones in red (these are optional).

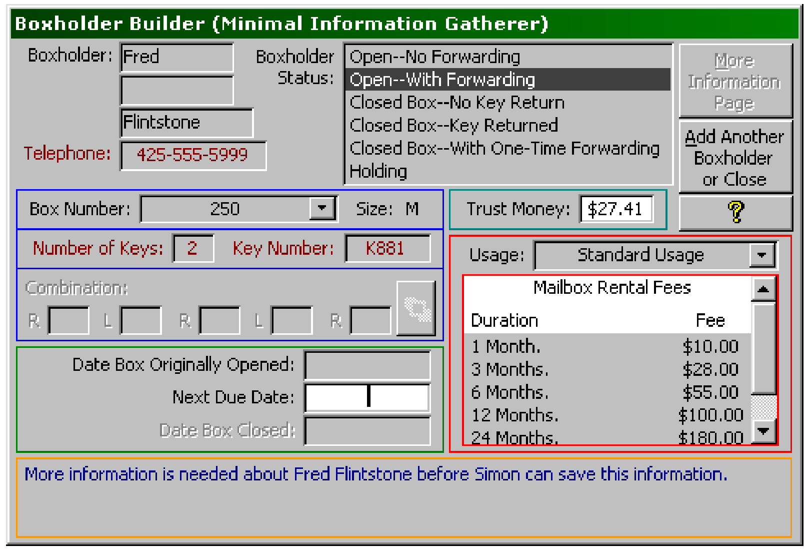


Figure 11. The Boxholder Builder is a great tool for setting up your current boxholders into the Simon system when you first start using Simon. The limitations are that the Boxholder Builder does not set up complete history for a boxholder and that the many reports you might want to create when setting up a box will not be available from here..

1) The boxholder first and last names,
2) The status of the box (Open–No Forwarding, Open–With Forwarding, *etc.*),
3) The box number that the boxholder occupies,
4) The date the box was originally opened, and
5) The date when rents are next due.

A few things to note here: a status such as Open–With Forwarding and any of the Closed Box statuses may require other bits of information, also, you may want to add your closed boxes using this tool (at least the closed boxes within the last 6 months), so that your postal quarterly report will conform to postal regulations as set forth in the domestic mail manual.

The Boxholder Builder requires just a bit of information for each boxholder to get them into the system, but you are nevertheless allowed to add as much information about a boxholder as you want. Once you have filled out the required information as shown in **Figure 11**, you can move to the more information page by clicking on the **More Information Page** button.

Boxholder Wizard. The Boxholder Wizard can be found by clicking on the icon as shown next to the heading Adding Boxholders on page 4, and then choosing the Boxholder Wizard in the box that will appear. Or, you can use the Simon Helper and choose Add New Boxholder at the top of the Mailbox Rental list.

The wizard will walk the user through step by step asking questions as it works its way through the process or opening a new box for rental. There are as many as 11 steps in this process but, if mail forwarding is not needed, two of the steps will be ignored. At the end of the wizard process, the user will be able to print an invoice for the transaction, 1583s for the boxholder and any other mail recipients other than immediate family members, credit card authorization form if the boxholder has opted to have his or her credit card used for making mailbox rental payment, rear box identification tag, mailing labels, marketing stuff. As a part of this process, precise history is added to this boxholder's record so that later on when you need to create a sales report, this transaction will be included.

Simon Helper. The Simon Helper is a menu where you can jump off to many Simon operations. In fact, there are more tools in this menu than you will ever use. *See*, **Figure 13**.

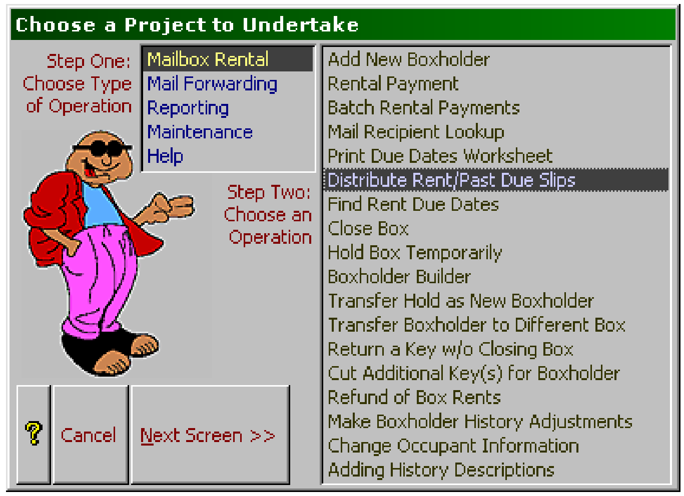


Figure 13. The Simon Helper window makes it easy to find specific operations that you need to perform.

To use the Simon Helper, you should make a choice in **Step One: Choose Type of Operation**, and then make a choice in **Step Two: Choose an Operation**. Once you have made your selections as noted above, you can click on the **Next Screen** button to start the process of performing the functions relating to the operation you have selected. Or, you can just double click on the selection you want in the **Step Two** box. Either method works the same way.

If you are unsure of what a particular operation does, just select the operation in **Step Two** and then click on the Help button (this would be the button with the yellow question mark).

Rent Due and Past Due Notices. You want to get paid for mailbox rental when boxholders are due. Right?!? This is how it is done. Simon will create rent due and past due slips that you can insert into the back of a mailbox or, if you ask nicely, Simon will create a letter instead. Why would you need a letter? In some cases, a boxholder may not visit your store to pick up mail and thus would never see a rent due or past due slip. Sending a letter is a better alternative in this case. Simon will also create a credit card payment report that you can use to charge mailbox rent to a boxholder's credit card if the boxholder has given you permission to do so. Simon knows all of this based on information you have given Simon in the past.

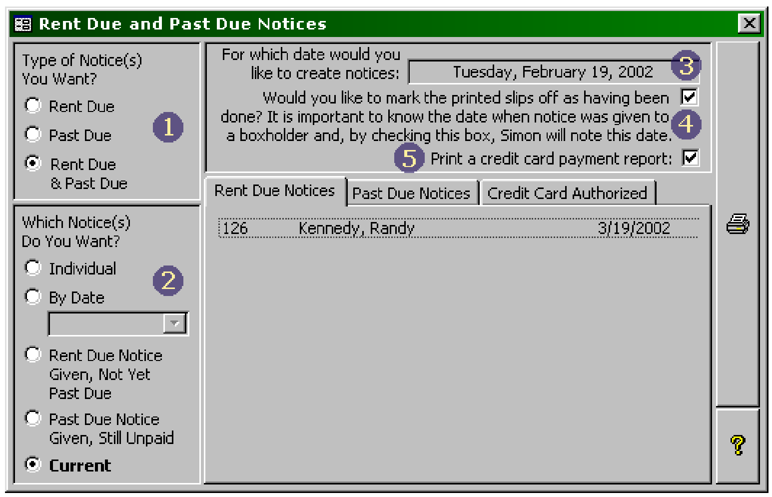


Figure 15. Rent Due and Past Due Notices has changed a lot. You will have much more control over how notices are given with Version 2.

The first area along the top, left shows what type of notices you want to create–rent due, past due or both. By default, when you open this form, both will be chosen.

In the area just below this area, you have five choices that you can make, with the default choice being "**Current**." *See*, **Figure 15**.

The "**Individual**" choice will create a rent due slip or letter for the boxholder you choose from the lists. This will be a notice that you delivered to this individual in the past (this is based on the date added to the history for that due item by checking the check box next to bullet 4).

The “**By Date**” choice will allow you to print notices that were given on a specific date that you select from the list of dates. Only dates where slips were distributed will be on the list (this is also based on the date added to the history for that due item by checking the check box next to bullet 4).

The “**Rent Due Notice Given, Not Yet Past Due**” choice will print notices just as it suggests. It will print only those rent due notices for those who have received notice at least once, but have not yet paid and are not yet past due.

The “**Past Due Notice Given, Still Unpaid**” choice will print past due notices just as it suggests. It will print only those rent past due notices for those who have received at least one “dated” past due notice, but have not yet paid.

The “**Current**” choice prints all rent due and past due notices (depending on your choice in the bullet 1 area), that have not yet been given the same type of notice.

The date box located at bullet 3 will be the date that will show up on the notice as the date when the slip/letter was distributed. This is also the date that will appear on the history record for the boxholder if you have bullet 4 checked. We suggest that you do have this date set in the boxholder record. To change this date, double click on the date box and choose a date from the calendar and then close the calendar.

Bullet 4 gives you the option of having the date set within the boxholder’s history so that you can tell when notice was given to the boxholder. We suggest that you do let Simon mark a record as having been given notice.

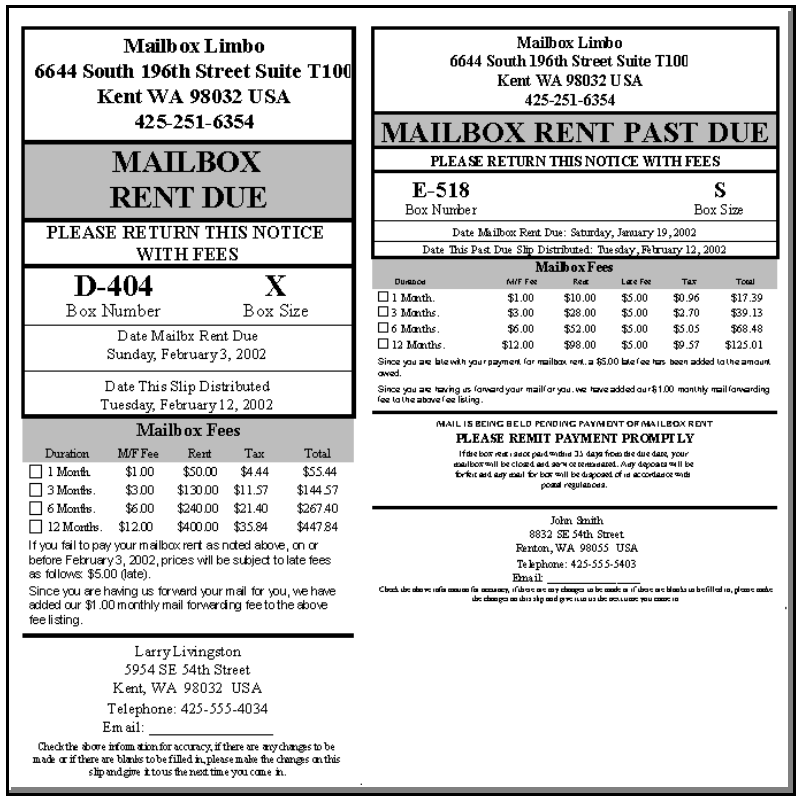


Figure 16. The Simon rent due and past due slips.

Bullet 5 is a feature that will print a report for those who have authorized you to just use their credit card to make mailbox rental payments. With this check box checked, a report will be printed that you can use as a reminder to charge their credit card. If you do not have any customers who are doing this, you will want to uncheck this item, though it is not necessary to do so–Simon will just not create a blank report.

Rent Due and Rent Past Due Slips. The rent due slips come three per page; and the past due slips come two per page. These slips give a lot of information as you will be able to see from **Figure 16**.

Making Batch Mailbox Rental Payments. Simon comes equipped with a tool for making a mailbox rental payment that uses the wizarding technique as seen in quite a number of the tools within Simon. There is also a batch payment tool as shown in **Figure 17**. This form is simple to use. Just add the box number in the box at the top of the form. You can type it in or select it from the drop-down list. The boxholder's name will appear at the top of the form, the size of the box, the usage level and the due date. You can choose a duration from the box where "6 Months." has been chosen. *See*, **Figure 17**. The term and the fee will appear in the gold area. By the way, you needn't choose from the list. If a duration is not available for the box, just type in a term and the fee you want to charge in the gold area. History will appear in the middle grey area with a totaling towards the bottom. When your payment is set in the area above, check or uncheck the "Invoice?" check box, depending on whether you want an invoice or not, and then click the "Post This Payment" button. That's it. You are ready to process another payment.

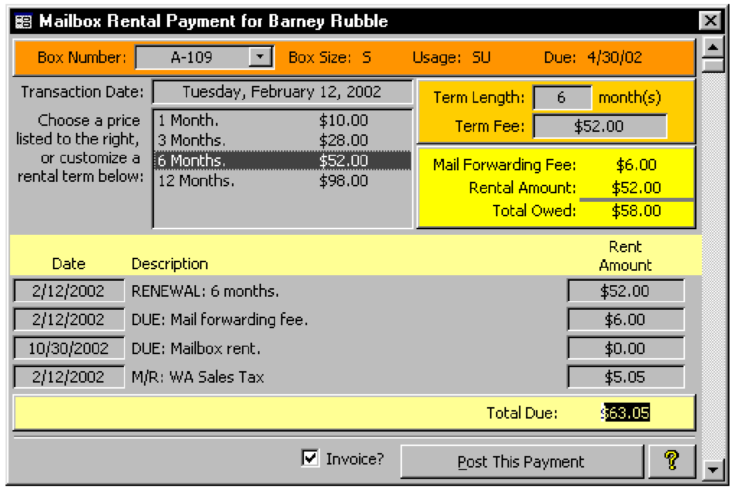


Figure 17. The Mailbox Rental Payment form is best used for making batch mailbox rental payments.

Mail Forwarding. Simon does a great job of keeping on top of mail forwarding processes for you. Once you have a person set up as needing forwarding, you will be able to run mail forwarding events easily and Simon will keep track of the moneys owed and the billings.

To set up a new boxholder as a client needing mail forwarding, you should answer the box status question in either the Boxholder Builder or the Boxholder Wizard as "Open–With Forwarding." If you answer this question as specified above, you will need to set certain information that is pertinent to mail forwarding only. For instance, you will need to let Simon know how much money this client is putting on deposit to be used as forwarding funds or, credit card information if the client will pay for forwarding by credit card. You will also need to enter the address where forwarded mail will be sent and how often mail forwarding will be accomplished. There is other information that might be needed, but this is the most important.

If the boxholder is already in the system and you need to change the client to a mail forwarding client, you should use the Close Box tool from the Simon Helper. There are five ways to close a box and the one you will want is the one that transfers a boxholder to a mail forwarding client. You can also find a tool under Mail Forwarding in the Simon Helper that will do this for you. This tool will suggest moving the client to a (F) forwarding box, but you are not obligated to do this. The other questions about funds and mailing address are asked using this tool as well.

After you have a client set up as a mail forwarding client, you can run through mail forwarding events whenever you feel that the client is set to receive his or her mail. You can do this by choosing "Forward Mail" from the Simon Helper. This is a wizarding tool that will walk you through several steps. The first step just wants to know for which client to forward mail. Choose the client from the list and then click on the Next Screen button to continue. The second step shows the mail forwarding information such as how often to forward their mail, special information regarding their forwarding, how addressing will be handled, the amount of fees or credit card information for this client. If you proceed to the next step, you will be ready to itemize their mail forwarding event.

When you get to Step 3 you should add the best title for this event in the text box at the top of the form. Choose the best fit for this event from the drop-down list. If you have set a fee for each mail forwarding event in the mail forwarding store preferences area, a listing will already be set for this in the history list just below. Add additional expenses or funds to the area below with the date ascribed to this item, the item from the list best describing the item and the income or cost. Once you have itemized the expenses and funds, you can click on the tax button at the top of the form to calculate taxes for the items in the list. *See,* **Figure 18**.

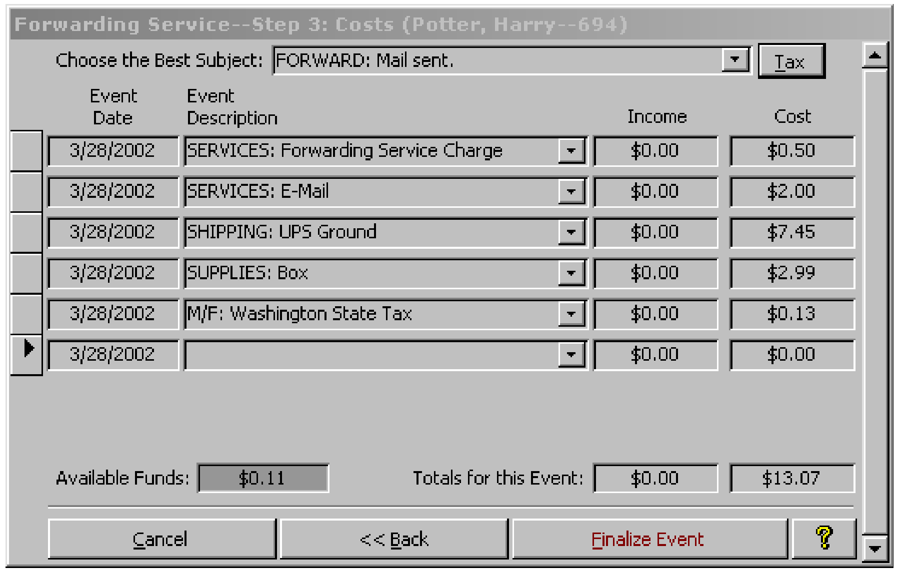


Figure 18. You should itemize all of the expenses that you will be charging for sending mail to a mail forwarding client. Notice above that the available funds for forwarding has dwindled down to 11 cents after this forwarding event.

After you have itemized the mail forwarding for this client, you should click on the Finalize Event button to complete the mail forwarding process. You may be asked about invoicing if you have the proper options set in the mail forwarding store preferences area. And, in the case shown in **Figure 18**, you may get a message about the lack of available funds and the invoice, if you are creating one, will reflect the fact that available forwarding funds is low.

Reporting. Simon comes equipped with tons of useful and interesting items you can print. I will not get into this. You can open any of the reports in preview mode so that you can see what they look like.

Things You Will Need Before Installing Simon

1. Name & Address of your Post Office.

2. Prices and Duration. (See: Mailbox Rental Store Preference & Mailbox Rental Fee Editor)

Use can use the below chart to help you organize your thoughts as to how you will be setting your rates and for the types of sizes and usages you will be using. There are examples of how you should proceed at the top in green and some blank areas where you can set your own sizes and your own durations, if you plan to create your own.

Usage	Duration Description	Duration	Small	Medium	Large	X-Large					Forwarding	Parcel Pick-up
Standard	**3 Months.**	**3**	**$30**	**$40**	**$50**							
Business	**3 Months.**	**3**	**$40**	**$50**	**$60**	**$70**						
Standard	**6 Months 1 Free.**	**7**	**$50**	**$60**	**$80**	**$90**						
Heavy	**24 Months 6 Free.**	**30**	**$240**	**$250**	**$260**	**$270**						
	1 Month.											
	3 Months.											
	6 Months.											
	12 Months.											
	___ Months.											
	___ Months.											
	___ Months.											

3. Create Box Number Database. (See: Mailbox Inventory Setup)

Simon insists that it know the boxes that can be rented at your location. By knowing this in advance, Simon can tell you which boxes are occupied and which are vacant, can keep track of the master key number and how many keys you have for a specific box and can remind you when a key tumbler or combination lock needs to be changed before renting again.

Starting Number	Ending Number	Size	Prefix	Suffix	Combination/ Key/Neither	What these setting will create
101	**150**	**Small**			**Key**	**Small key-entry boxes from 101 through 150**
500	**550**	**X-Large**	**C-**		**Combination**	**Extra large combination lock entry boxes from C-500 through C-550**
700	**720**	**Jumbo**		**-M**	**Key**	**Jumbo key-entry boxes from 700-M through 720-M**
800	**895**	**Forwarding**	**B**	**D**	**Neither**	**No front access forwarding boxes from B800D through B895D**

Simon Helper Layout

The Simon Helper is the menuing system within Simon where you can run most all mailbox rental, mail forwarding, utility and reporting operations. This tool can be found by clicking on the first button from the left at the top of the Simon window. The below is a summary of what each menu item entails. If you want more information about a particular menu item, you can go into Simon bring up the Simon Helper form, click on a menu item and then click on the yellow-question-mark button. This menuing system is organized as follows:

Step One: Mailbox Rental

Add New Boxholder .... System which allows you to fill in information for new boxholder (1583 compliant)
Rental Payment .... Step-through system for making single mailbox rent payment
Batch Rental Payments .... Add numerous rental payments without having to work thru numerous steps
Mail Recipient Lookup .... Search tool to help you find people or companies who are receiving mail at your store
Print Due Dates Worksheet .... A large report listing all of your mailboxes, due dates, fees, *etc*.
Distribute Rent/Past Due Slips .... Print rent and past due slips, and credit card payment report
Find Rent Due Dates .... Search tool for finding the next mailbox rent due date for any open box
Close Box .... Five step-through-system tools for closing a mailbox
Hold Box Temporarily .... Step-through system for holding a mailbox for a set number of days
Boxholder Builder .... One-step tool for initially setting up your boxholders
Transfer Hold as New Boxholder .... Customer rents mailbox after having it on hold
Transfer Boxholder to Different Box .... A current boxholder moves to a different mailbox
Return a key w/o Closing Box .... A current boxholder returns unneeded key(s)
Cut Additional Key(s) for Box holder .... A current boxholder needs additional key(s) cut
Refund of Box Rents .... Refund money for days not used for rent paid in advance
Make Boxholder History Adjustments .... Make boxholder history adjustments (set correct due dates and amounts)
Change Occupant Information .... Delete and update other mail recipient information
Adding History Descriptions .... Add your own history descriptions

Mail Forwarding

Forward Mail .... Add mail forwarding charges, and make deposits to boxholder's mail forwarding account
Open Mail Forwarding Client .... Initial setup for mail forwarding client
Cancel Mail Forwarding Client .... Closure of client's mail forwarding service
Change Boxholder to Forwarding Client .... A current boxholder wants to add mail forwarding service
Forwarding Mailing Labels .... Mail forwarding address mailing labels printed on Avery 5160 label sheet
Adjust Forwarding Orders .... For adjusting specific mail forwarding information

Reporting

Distribute Rent/Past Due Slips .... Print rent and past due slips, and credit card payment report
Print Due Dates Worksheet .... Listing of all mailboxes--sorted by due dates, box numbers or customer name
Sales .... Print sales reports and reprint invoices
Customer Information .... Print past and present customer history
Due Dates .... Print boxholder due date report by due date, boxholder name or box number
Closings .... Show all mailboxes to be closed sortable by box number, due date or boxholder name
Postal Quarterly Report .... Print Post Office quarterly reports according to the DMM standards
Individual 1583s .... Print blank & individual 1583 for past and present clients, boxholder or other mail recipients
All 1583s and 1583A .... Print blank and completed 1583 and 1583A form
Mailing Labels .... Print address label sheets for your present customers
Rear Box Identification Tags .... Print mailbox tag to identify a boxes mail recipients
Come to the Front Counter Slips .... A slip to notify customer to come to the front counter
Telephone Numbers List .... Print a list of primary boxholders' telephone numbers
Print Mailbox Rental Agreement .... Create, edit or print mailbox rental agreement
Boxholder Combination List .... Print a list of boxholders combination numbers
Boxholder/Occupant list .... Print a listing of all mail recipients
Vacant Boxes .... Print a list of all your vacant boxes
Closed Boxes .... Print a list of all your closed boxes

Maintenance

- Archive Closed Boxes .... Just in case the closed boxes was not archive
- Quick Setup .... A walk-through on how to setup your store information
- Mailbox Builder--Initial Setup .... Help to set up your mailbox numbering system
- Mailbox Builder--Add Banks .... Add new boxes to your present inventory
- Rotate Key Tumblers .... When someone failed to turn in their keys, need to change the lock
- Unclose a Closed Box .... Old customer returned-retrieve past history
- Undo a Rental Payment .... Able to delete payment made by mistake
- Undo a Mail Forwarding Procedure .... Able to delete mail forwarding procedure made
- Uncancel a Mail Forwarding Client .... Customer cancel mail forwarding
- Diagnostics Area .... Help to straighten out problems that may occur in the program
- Boxholder builder .... A quick and fast way to setup boxholders in your system
- Backup/Restore/Import/Export .... Back up and restore tool so you can protect your data
- Adding History Descriptions .... Adding your own history descriptions

Help

- Consult Help .... Use to look up help articles
- Show Reminders .... Remind you when things needs to be done
- Show Tip .... Show a Quick tip
- Create Your Own Tips .... Set up your own quick tips
- Reinstate Tips .... Reinstate your quick tips if you have turned them off
- Help Editor .... Create your own help articles

My First Simon Operation (beyond the initial options setup)

After you complete the initial options setup, including mailbox rental pricing and box number set up, you will want to do something more interesting with Simon. Well, the first thing you will want to do is add a customer. This paper will go through the steps for adding a fake customer from start to finish. Since your customers are probably already set up in your present system, I will also show you how to get your customers entered so that the due dates will happen as they should.

In some cases, it might be a good idea to reclaim all past history for each customer. If you want to do this, the approach would be to just date every operation you do as if you were doing it on the day it actually happened and proceed through the years for each customer. If you have tons of boxes and lots of customers that go back many, many years, this might not be practical. No matter how you want to do it, the following should help. At the end of this, we will go in and delete the fake customer just so you will know how you can do this as well. It is not typically a good idea to throw anything away, so deletions are discouraged in favor of just closing the customer's box.

Getting Started. The rest of this assumes that you have successfully completed the initial options setup and have all of your boxes and pricing in the system, If this is not done, or if you want to check your options, (1) click on the Store Preferences buttons to see how your system is set up (fifth, fourth and third buttons from the right on the top button bar). Make changes if necessary. Also, (2) click on the Box Number Editor (Second button from the right) to see if all of your boxes are there and they are all set to vacant. And, (3) open the Mailbox Rental Fee Editor to see that pricing is set for all sizes, durations and usages that you will be using at your store. The Mailbox Rental Fee Editor can be found by clicking on the menu item Preferences and then choosing Mailbox Rental Pricing. If all this seems in order, we are ready to work with Simon.

If the Simon Helper is not opened yet, click on the button that looks like Mr. Potatohead (first button from the left on the upper button bar). This will open the Simon Helper so you can see the many operations that you can do with the step-through format offered by Simon for many of the complicated operations you might want to do. Towards the top, right of the Simon Helper screen, you will see a small box with five blue text lines in it. This notes the different types of operations that you can select. Click on a few of these to see what happens in the window to the right. The operations for the five types are different. So, if you are in need of a report or something of that sort, you should click on "Reporting" above and choose an operation that fits what you need.

Click on the "Mailbox Rental" operations line in the "Step One" box and click on "Add New Boxholder" in the window adjacent to "Step Two". To add a new boxholder you can either double click on the line entitled "Add New Boxholder", or you can just select it like we just did by clicking on it and then clicking on Next Screen (or hit the key combination, Alt+N, as noted by the underlined capital N on the Next Screen button). Click on Next Screen to move to Step 1 if you haven't already done so.

Step 1: Transaction Date & Keys. After you have entered Step 1, you will notice that the date of the transaction is set at today's date. If you are doing this operation as the customer stands in front of you, you will leave this date set and ask them how many keys they want and what size of box they would like. You will leave the date set for today, and click the arrow on the box number combo box. This will show you a list of available boxes, the size of the box, and the number of keys available (if you have set up keys in the system). If you have not set up keys in the system, the number of keys will be zero. If you have set up keys in the system, the number will show the number of keys available. This is a great way to avoid overcutting keys as you can choose a box that has exactly the number of keys the customer wants. Choose the first box available on the drop-down list.

The box size will automatically be set to the size of the box as you have set in with the Box Number Editor. You will next add the number of keys the customer wants. If you have set up keys before starting, the exact number of keys in the system will appear in the Number of Keys box, though you can change this if you like. Give this customer two keys. If you have decided to enter the key numbers as engraved on the master key, you can enter this number now in the Key Number box. By doing this, auditing will be activated for this box. Eventually, if you do this key number bit on every box you rent, all keys will be in the system and you can then keep track of keys a bit easier.

In the middle of the form, you will want to set the usage level. The usage level is a pricing variance whereby you can set different pricing based on a boxholder's usage of the box. For instance, you can set a usage level and pricing thereto for those conducting business from the box. You could also use the usage level as a means to set a price increase for those renting boxes from this date forward, thus grandfathering in those who are set at the previous usage level. If you have using the Standard Usage level, leave this in the drop-down list box. Pricing for standard usage, for the box size as noted on the form above, is shown in the box with the pale yellow heading.

Lastly, you should let Simon know if this boxholder will require that due notices be given by letter, rather than the typical slip that you insert into the box. This is used when you know that the boxholder will not be entering the store to check his or her mail (mail forwarding clients come to mind immediately). Do not check this box for this sample.

One last item of interest for the "Date of This Transaction" box at the top of the form. If you want to change the date in this box, you can double click on the box to bring up a small calendar where you can select the date you want. The date will be added to this form when the calendar form is closed.

After this has been accomplished, you should click on Next Screen (or Alt+N).

Step 2: Customer Address Information. This screen has many boxes to fill out. If you are creating this as the customer waits, you can ask them, "What is your name?", if this is for a company, "What is the name of the company?", *etc*. Fill out the following fields. By the way, if you are unsure what information goes in which text box, look at the bottom, left corner for a description of the information that should be placed in the box where your cursor rests. Also, note that by tabbing from one box to another, the cursor will move in a uniform manner. Enter the following information:

First Name:	Fred
Last Name:	Flintstone
Company Name:	Bedrock Stone & Gravel Co.
Street Address Line 1:	3812 Stone Cutter Avenue
City:	Bedrock
State:	WY
Postal Code:	83112
Country:	USA (defaults to USA)
Telephone:	555-555-2349
Email:	fflintstone@bnl.com
Note:	Surly guy, with a very bad wardrobe. (this will not show up on the 1583, but is a good place to put notes about a boxholder.)

Some of these text boxes do require some type of entry (the info that is required on the 1583, for instance).

There are two check boxes on this form. The one adjacent to the client's name should already be checked. By having this checked, the invoice for this client will be addressed with his or her name as a part of the address. If the second check box is checked, the business name will be added as well. If you remove the check from the check box adjacent to the client's name, only the business address will be on the invoice.

Click on Next Screen.

Step 3: Status and Identification. You have two choices under Status. Choose Open–With Forwarding. The reason I want you to choose this one is because the other ignores several steps regarding mail forwarding. I would like for you to see the mail forwarding set up screens just so you know there is a difference in the operation of this Simon Helper operation. After making the selection from the drop-down list under Status, hit TAB to move to the ID information. Add the following information.

First ID:	FLINTSFD543JK
Expiration Date:	4/23/05
Description:	Driver's License (choose from list)

Second ID:	58923234
Expiration Date:	Leave Blank
Description:	Armed Forces (choose from list)

There is a report you can print later that will show you the boxholder's and spouse's, *etc*., whose ID is out of date in the event you want to make your clients resubmit ID when their ID is no longer valid. As far as I know, this is not a requirement by the postal service.

If this client has authorized your store to automatically make mailbox rental payments from his or her credit card, you can fill out the information in the bottom half of this Step 3. We are not going to do this as a part of this sample process.

Click on Next Screen.

Step 4: Spouse and Other Names. This is an area to add the spouse and all other names of people that might receive mail in the box. This area is reserved for immediate family of the boxholder and businesses owned by the boxholder. In accordance with the DMM, you cannot just add anyone to a box. Only immediate family members can be listed on the boxholder's 1583, and the information that we have been adding so far is information for the boxholder's 1583. Others will require separate 1583s and thus will have to be handled differently. Add the following information:

Spouse Name:	Wilma Granite-Flintstone (the tribulations of only have stone-related last names).
First ID:	FLINTSWM293GH
Expiration Date:	6/12/06
Description:	Driver's License (choose from list)

Second ID:	89345346
Expiration Date:	Leave Blank
Description:	Corporate ID

Click on the Other Names tab and add the following names:

First Name: Wilma
Last Name: Flintstone
Next Record
First Name: Wilma
Last Name: Granite
Next Record
First Name: Pebbles
Last Name: Flintstone
Next Record
Company Name: BSG Co.

A few things to note here. Each person or company must occupy a new record within this area. A new record is noted by the solid black line that separates one record from another. You can throw a record away here by clicking on the trash can button.

Click on Next Screen

Step 5: Business Information. Since Fred does business with the public, we will fill out this area:

Click on the “Yes” box towards the top. Notice that the address information will show up for the address given in Step 2. Of course, you can change this if the business address is different.

Business Street Address Line 1:	6945 Gravel Road
Business Street Address Line 2:	Suite 691
City:	Bedrock
State:	WY
Postal Code:	83112
Telephone:	555-555-2346

Click on the Other Business Information tab.

Kind of Business:	Stone Product Manufacturer
Firm Members:	Fred Flintstone, Barney Rubble
Registered Corporation:	Marble County, Wyoming, 1957

Click on Next Screen

At this point you may get a message telling you how many keys you will need to cut. If you have keys already in the key inventory for the box Fred will be renting, this message will not appear. Or, if it is a combination lock box or a box set for mail forwarding that has no front access, or if Fred does not want a key and prefers to bother your employees to get his mail.

Step 6: Occupant Information. If you have other people receiving mail in this box, this is where that information will go. We will add Barney and Betty Rubble as occupants on this box. I no, I no, occupants do not occupy the box but, for lack of a better, shorter name, we decided to use occupants. Add the following information:

First Name: Barney

Last Name:	Rubble

Notice that the address for Fred is entered, you can change this to:

Street Address Line 1:	1121 Dust Street
City:	Bedrock
State:	WY
Postal Code:	83112
Telephone:	555-555-1112

Click on the Identification tab and enter the below:

First ID:	RUBBLBA543ED
Expiration Date:	7/13/05
Description:	Driver's License (choose from list)

Second ID:	1231245
Expiration Date:	Leave blank
Description:	Armed Forces (choose from list)

Yes, Fred and Barney were war buddies. Click on the Other Names tab and enter the following information:

Bernard Rubble

Click on the Business Info tab and enter the following:

Click in the business "Yes" box and note that all of the business information from Fred's stuff is added. If you click on the Address Information tab, you will see that the company name is added. If this is a different business, you can change this, but the majority of the time, this will be what you want.

Click on the Business Address tab and notice that it is already filled out for you. This was done when the Yes box was clicked.

Go to the Address Information tabbed control, click on the big yellow pencil button to add another occupant.

First Name:	Betty
Last Name:	Rubble

Notice that the address for Fred is entered, you can change this to:

Street Address Line 1:	1121 Dust Street
City:	Bedrock
State:	WY
Postal Code:	83112
Telephone:	555-555-1112

Click on the Identification tab and enter the below:

First ID:	RUBBLBE654FW
Expiration Date:	11/19/05
Description:	Driver's License (choose from list)

Second ID:	176545
Expiration Date:	Leave blank
Description:	Armed Forces (choose from list)

Once you have added these two occupants, Simon will know that it needs to generate 1583s for both Barney and Betty. This is a requirement of the Domestic Mail Manual.

Click Next Screen

Step 7: Rental Information. On this screen, you will find the rates for the durations that you have set up for the specific box size/type and usage that you set in Step 1. You can either choose a duration from the list just below the gold area. Or, you can place the cursor in the Length of Rental Term box and enter your own duration for this box, along with the fee the boxholder will pay for the entire term. The rates will appear below to the left of these boxes along with any fees you charge for mail forwarding, initial mailbox setup and key deposits.

Click Next Screen

Step 8: Mail Forwarding Address Information. The information on this form is only available if Open–With Forwarding is chosen as an option. If you choose Open–No Forwarding, the next two steps will be passed over. On this page you will see all of the information from the Fred Address Information page (Step 2), since the majority of the time, this will be where the mail will be forwarded. You could edit this if the mail were to be forwarding elsewhere.

Click Next Screen

Step 9: Mail Forwarding Information. You have set some mail forwarding items in the Store Preferences area that will dictate how often the client wants mail forwarded and the amounts a client when certain things will happen such as when low fee warnings are generated. You can change this information, however. For instance, let's change the following:

Forwarding Frequency:	Quarterly (choose from list)
Today's Deposit:	$30.00
Low Warning:	$15.00
Replenish Amount:	$30.00

Credit card information is only necessary if the client has opted to have forwarding fees pulled from his or her card automatically.

Click Next Screen

Step 10: History. This is a listing of the history entries being made to Simon for this client. Simon keeps track of everything you do and the dates on which you do it. You can edit these, but typically they will be correct in accordance with the information you have added to Simon. If there is a problem with anything here, you might want to back up through the screens to fix the problem that may have happened , say, on Step 3. If everything seems correct,

Click Next Screen

Step 11: Finalization. This screen will show you all of the things you can print to get the box set up. If the boxholder has been dictating the information to you as you type it in, you can have the 1583s printed and signed right there. Go ahead and print all of this stuff so you can see how it works. Click on Finish. When it asks for special letters and things, just answer yes so you can see it all.

Pretty nice, huh! That is all there is to adding a new boxholder and, as you do more and more, the process could be accomplished in just a few minutes. Most of the other Simon Helper operations will follow the same wizard-like pattern of event (walking you through every aspect of setting something in action).

Setting Up Preexisting Boxholders In Simon. Like I suggested at the beginning of this paper, it would be preferable to set up each and every customer from scratch (going back through your paperwork and making every entry as it happened way back when). If, however, this seems a bit much, then you might wish to just start where you are–in the here and now. To do this, you can use the Boxholder Builder tool.

The Boxholder Builder requires that you input, at a minimum, this information:

Boxholder's First Name
Boxholder's Last Name
Boxholder Status
Assigned Box Number
Date Box Originally Opened
Next Due Date

If you set the boxholder status to something other than Open–No Forwarding, Simon may require additional information. Be this as it may, Simon will still only require the bare minimum of information to get your people into the system.

Removing Fred Flintstone's Mailbox Rental Record. Now that you have added this one bogus record, it might be a good idea to get rid of it for good. Go to the Simon Helper menu form. Click on the Mail Forwarding operations type (Step One) and then choose Cancel Mail Forwarding Client. Click on Next Screen.

Click on Fred's record from the list (should be the only one there), and then click on Next Screen.

From the Step 3: Cancel Mail Forwarding Service screen, leave everything as is and click on Next Screen.

Step 4 shows that entries will be made in history showing the refund of the key deposit and the refund of mail forwarding deposits. Click on Next Screen.

You needn't create a paper record for this transaction, but you might want to do a closed box slip just to see what it looks like, so uncheck the paper record check box and then click on Finish.

Click on Tools on the menu and then choose Box Number Tools. From the Box Number Tools form choose the Box Number Editor.

You will see that the first box you have in the system (the one you assigned to Fred), has been reset to Vacant. If you had added a Key Number in Step 1 of the operation we handled earlier, you will see the number imprinted in the Key Number box. You will also see that there are now keys available (the keys turned in by

Fred). Remove the Key Number information and set the Number of Keys to 0, if this information was entered only to see what would happen, but is not correct. Uncheck the Rotate check box if this is set.

Now we need to clean out the archive area because we want to get rid of Fred altogether. Normally, all of these steps are not necessary because real clients should remain in the archive indefinitely.

Bring up the Simon Helper and click on the maintenance operations item in the list. Choose Diagnostics Area from the list and click on Next Screen. A warning will appear. Answer Yes so you can continue. Click on Archived Boxholders.

Find Fred’s record, if necessary using the Customer ID drop-down list. There is a grey bar running the length on the left side of the screen for Fred’s record there. Click on this grey bar and it will turn a darker grey. Hit the delete key on your keyboard. A warning will appear, answer YES. Fred is now gone.

Conclusion. I hope this has all been helpful in giving you some insight in how all of this works. Have fun!

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