

Simon Version 3 Upgrade

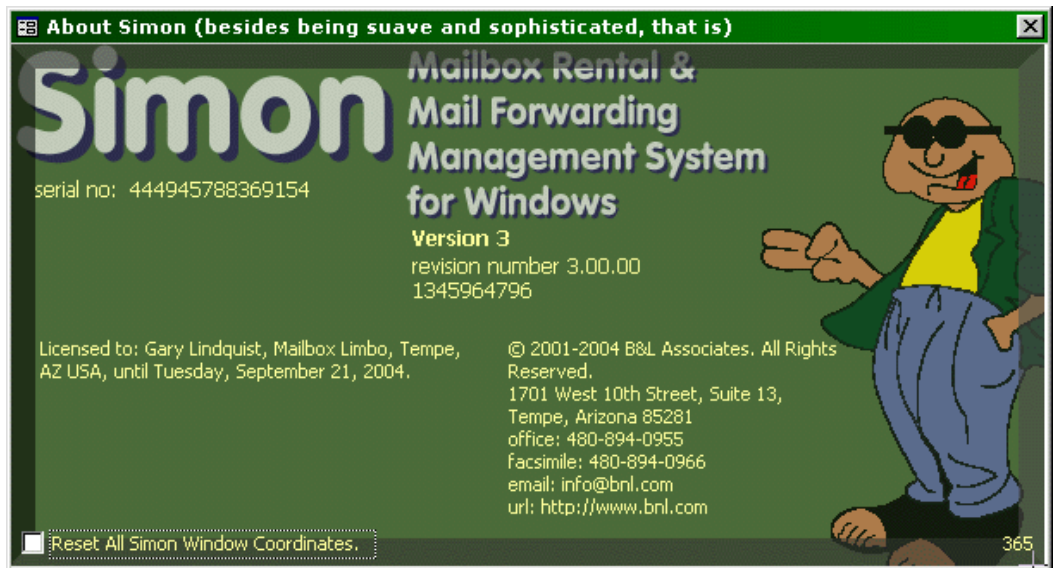
A lot of changes were made to Simon Version 2 to bump it up to Version 3.

Originally, I anticipated that this project would move up to revision 2.08.00. But, it became much more complex and many more features were added. So, we decided that the changes warranted an entire new version. This version changes has taken more than a year to get together. Wow!

Here is a fairly comprehensive list of the changes and improvements which have been made:

1) Most all forms, and some of the reports, have been enhanced and beautified. The forms use in Simon will now take advantage of large system monitors that can use display resolutions of 600x800, or higher. **If you are using Simon on an old beater of a computer, you will have to upgrade your computer system to one that can handle a monitor of a larger size than those silly 14-inch monitors, and a display adaptor that can set screen resolutions of at least 800x600. Now, now, let's not get all testy about this, we are only asking that move up to 1990 standards.**

2) Adds package tracking so that you can keep track of packages sent to mailbox clients, when packages are picked up by clients, etc. This tool will remind you when clients come in to do mailbox rental business at your counter that they have a package in the backroom. This tool will create the appropriate notices



that you have a packaging waiting for someone and will create a disclaimer that a client should sign when they pick the package up declaring that they will hold your business harmless for damages to the package.

3) Adds after-hours, front-door access key auditing. Also pass code distribution for front-door access. Forms were added and changed so that you can add and remove keys from clients using front-door access as well as mailbox keys. These keys and deposits are audited similarly to how you audit mailbox keys.

4) Improves the Boxholder Information form to give more control over the information therein. You can now delete boxholders from this form and move directly to the archived clients by simply clicking a button. Just a much better feel to this vital area. Also, you will be able to get a more complete picture of client history right from the Boxholder Information form. **After distributing this Version 3, I did come up with a few more interest ideas for the Boxholder Information form that I will incorporate in the next revision.**

- 5) Adds a preference setting wizard that will go through the more important preference setting in a number of coordinated steps. And, a tool to check and understand how setting timings affects how rent due and past due notices are distributed. The Preference Wizard will help those getting the trial version to fill in their business preferences. The tool for checking timing settings will help the new user understand how Simon figures out when to send notices.
- 6) Hugely improves the reminders area so that it will be easier for users to set reminders for such things as rent due and past due notice distribution dates. You should use this tool. It is quite powerful and handy.
- 7) Upon opening Simon, the user will be notified of
 - (a) boxes that need to be closed due to non-payment of rents,
 - (b) hold boxes where the potential client never came back to rent the box, and
 - (c) mail forwarding that needs to be done for a client.

Also, upon opening Simon, you will be notified if certain business preferences are not set. Some preferences need to be set so that Simon can help run your mailbox rental business. In the case where some preferences are not set, the Preference Wizard will appear when you first open Simon.

- 8) Better auditing of moneys upon closing a box. Whatever happens to funds when a client abandons a box. These funds are now kept in archive with the closed box. If the boxholder comes back in, you will be able to access the fees and ask for payment. Or, if the ex-client comes in to open a box, you will be notified that they have had a box in the past and will be charged these fees.
- 9) When adding new boxholders, Simon will let you know if someone has rented before and will allow you to use old data to fill in the forms, and will let you know if moneys are collectable from this client due to the closing of their box due to non-payment of rents. You will be able to charge all, a portion, or forgive the debt.
- 10) The rental agreement is now printable at the time you rent a box and is customized specifically for that client. Also, the Mailbox Rental Agreement Phrase Editor will make it easier for you to make adjustments to your Agreement. **If you had made edits to your rental agreement in Simon, you will have to rework this as the tables controlling the information for the rental agreement have been changed.**
- 11) Setting taxes will be easier due to changes to tax preference items. **You will have to reset your taxable history listings. But, it is vastly easier to do so now with Version 3.**
- 12) Relicensing forms have been vastly improved to make relicensing Simon even easier.
- 13) A lot of additional error trapping. What this means is that Simon will ‘catch’ errors prior to errors appearing on the screen. Believe me, it would be impossible to catch them all, but a lot of them are trapped now.
- 14) Daily work product reporting has been added. This is a simple reporting tool that shows all of the Simon activity that has been done during a given day.
- 15) Compact and repair tool will make compacting and repairing your databases much easier and can now be done from within the Simon program. These are important tools that can repair those hideous ‘unrecognized database format’ errors that appears rarely, but can be devastating.
- 16) Backup warning upon exiting Simon. This warning will only appear if you close Simon using the Process, Exit direction of closing the program. If you click on the “X” button in the upper right cornering this warning will not appear.
- 17) Mailbox Rental Fee Editor vastly improved. When your mailbox system has millions of possibilities on how you set fees, it does follow that the tool for setting these fees is complicated. We have improved this tool so that it is very easy to set rates.

18) 1583 replaced with new April 2004 version. Yes, the Postal Form 1583 has been revised earlier this year. We have added the changes and have reformatted Simon somewhat to handle this.

This is an amazing upgrade to an already great program. Most of the changes made were in code. There are so many improvements that are transparent to the user.

There are also many changes that esthetically improve the usability of the interface. For instance, for those who have hundreds or thousands of boxes rented, you will find that all of the forms where you have to find clients from a list will have a refine box above the list that you can use to put in search criteria to reduce the list of clients to only those that fit the criteria you give Simon. This will help out immensely.

We have spent an enormous amount of time just beautifying Simon. Version 3 is certainly a beautiful program by any Windows program standard. We did more than just beautify, We did add quite a few exciting new features.

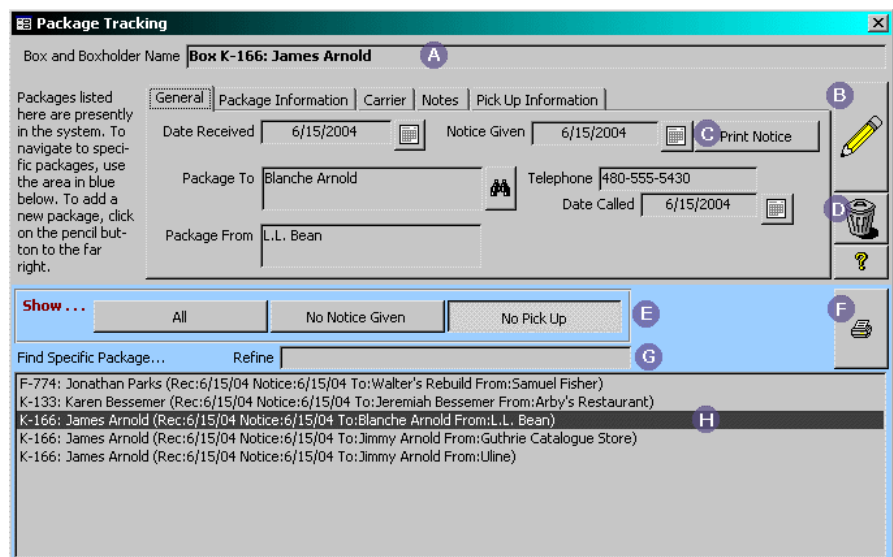
Package Tracking. Probably the most important added feature to Version 3 is the ability to audit packages that come into your business for delivery to your mailbox customers.

You can keep a lot of information about the packages that come into your business for mailbox clients, which will help protect your business against damage claims by your mailbox clients, missing package claims, *etc.* The image to the right shows the Package Tracking form.

You can do all package tracking operations from this form. Please note that there are several areas that are not visible on the Package Tracking form and I hesitate to add so many pictures to this document. Believe me, WordPerfect would not approve of such an image-heavy document anyway. Just be assured that all questions pertinent to the package have been asked and answered on this form.

The below 'bulleted' list will match up to the lettered bullets in the Package Tracking image.

- (A) When you click on the add a new package button (Bullet B), you will be able to choose which mailbox the package belongs to from a list of all of your boxholders. Once you make a boxholder selection to add to a new package in the system, the box number and name of the primary boxholder will appear in this box.
- (B) This button is the 'add a new package' button. Like mentioned above, a form will appear with a listing of all of your boxholders.



Click on the appropriate boxholder to select this boxholder. The box number, name of the boxholder, and telephone number will be added to this Package Tracking form to get you started on the auditing of the package.

(C) Once you have entered all of the information about the package that you intend to enter, you should click on this button to print a notice to insert into the boxholder's box to notify them that they have a package to pick up. Today's date will automatically be entered into the box next to this button. This notice will have ample information about the package to help identify it in the backroom when the client comes by to pick it up.

(D) You can delete packages from the package tracking system by clicking on this button. It is, however, best to leave packages in the system and let them follow the course of arrival, waiting for pickup, pickup. This way, you will be able to retrieve information about the package if need arises in the future.

(E) You can change the makeup of the list box at bullet H. You can show

- 1) all packages in the system,
- 2) those where the boxholder has not been given notice yet that they even have a package to pick up, and
- 3) packages that have not been picked up yet.

(F) You can print a listing of the packages that need to be picked up.

(G) You can use this tool to refine the listing of boxholders at bullet H. Enter a term in the Refine box and then hit the tab key to have Simon refine the bullet H list box only to show those packages that fit the criteria you entered in the Refine box.

(H) In order to bring up a specific package in the upper grey area of this form, you will need to click on the listing here.

Something interesting that is not shown in the image above is on the 'Pick Up Information' tabbed control (see above image). When someone picks up a package, you can have them sign a disclaimer that will protect your business if the contents of the package are damaged.

24-Hour, Front-Door

Access.

24-hour, front-door access has been added to Simon. You can now set deposits for keys and collect and refund these deposits when opening and closing a mailbox rental situation. Since setting some as using your front-door access services is rather seamless, it seemed more fitting to show an image of the preference setting for front-door access, rather than how it appears when opening or closing a box, or even how changes can be made to a clients access privileges.

The screenshot shows a 'Preferences Wizard' window with the title 'Front Door Access'. It contains several settings for front-door access:

- Do you offer after hours, front door access at your business? Two radio buttons are present: 'No Front Door (After Hours) Access' (labeled A) and 'Front Door (After Hours) Available' (selected).
- Do you charge a monthly fee for front door access? Front Door Access Monthly Fee: \$1.00 (labeled B)
- Do you hold deposits for keys or key cards in relation to after hours front door access? How many front door access keys or key cards in your inventory? 82 (labeled C)
- Enter the deposit amount you will charge for each key a boxholder is requesting. \$30.00
- Do you assigned a pass code for clients requiring after hours front door access? How many digits comprise your front door access pass codes? 0 (labeled D)

At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

The below 'bulleted' list will match up to the lettered bullets in the image above.

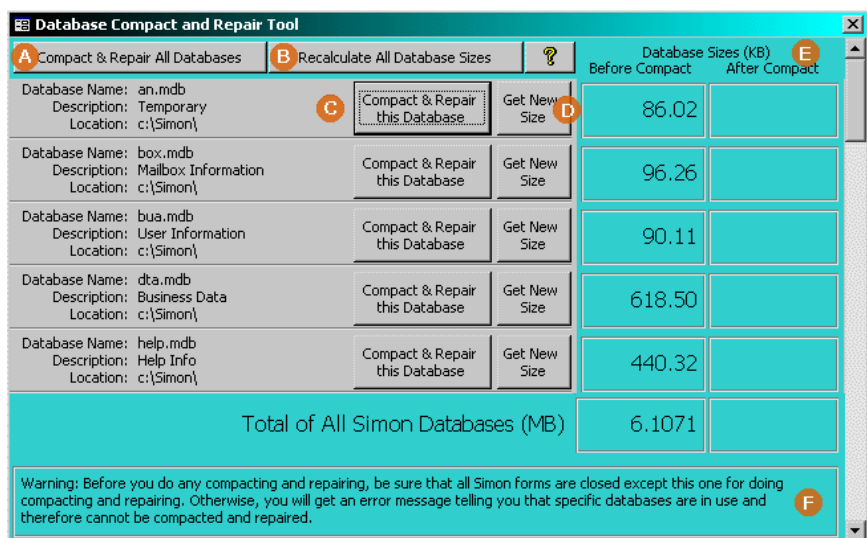
(A) By clicking on one of these two buttons, you will be telling Simon whether you offer, or do not offer, 24-hour, front-door access privileges. When you remove front-door access privileges, any options set for front-door access will be removed from the items in bullets B, C, and D.

(B) You can tell Simon that you want to charge a monthly fee for using your front-door access services. This fee will be payable along with mailbox rental fees.

(C) If you use keys, or key cards, you can tell Simon this. You can tell Simon how many keys, or key cards, are in your inventory to distribute to your clients and how much you want to charge as a deposit for outstanding keys, or key cards.

(D) If you use pass codes to gain access after hours, you can enter the number of digits in the code so Simon can randomly generate numbers for you. Of course, you can always enter the pass codes by hand.

Compact and Repair Tool. In the past, to compact or repair Simon databases, you had to go out of Simon and do it from the icons located in the Simon folder typically found in the Start/Programs area. This worked most of the time, but we did not have repair tools for each and every database and sometimes the ones we had did not work properly. This is all in the past. This new compact and repair tool can be used from within the Simon program. You can repair a single database, or all of them at once.



Why would you want to do this? Several reasons. If your computer were to crash while using Simon, a database could be damaged. You would get a message stating that a specific database is of an 'unrecognized database format.' In this case, you could simply go into this tool and repair the specific database mentioned in the error box.

Another reason is that database files become bloated over time. Space released from the system when you remove data from a database is not recovered and thus there are blank spaces in the database where data once resided. To recover this space, you can run the compact and repair all databases occasionally. Simon will run a bit faster if you do this.

The below 'bulleted' list will match up to the lettered bullets in the image above.

(A) By clicking on this button, you will be telling Simon that you want to compact and repair all databases one after another.

- (B) By clicking on this button, you will be telling Simon that you want to recalculate the size of all database one after another.
- (C) By clicking on this button, you will be telling Simon that you want to compact and repair this specific database.
- (D) By clicking on this button, you will be telling Simon that you want to recalculate the size of this database.
- (E) The area below this bullet will be filled out after you click on bullet B or bullet D.
- (F) This is simply a warning telling you to close all forms within Simon before compacting and repairing. Since data fills some of the forms within Simon, compacting and repairing cannot be done when data is in use. This form, however, does not use data from any of the Simon databases, so it does not effect the compacting and repairing of databases.

Boxholder Information Form. Most of the forms used in Simon have been beautified, but the Boxholder Information form has been revised to be much more powerful. One thing of note is that the Diagnostics Area has been removed because you can do all Simon tasks with the other forms that exist.

The below 'bulleted' list will match up to the lettered bullets in the Boxholder Information image.

(A) The box number shown in the Boxholder Information form will appear in the title bar. Also note that this is a current box, rather than a archive box. Yes, you can show current and archived boxes using this same Boxholder Information form!

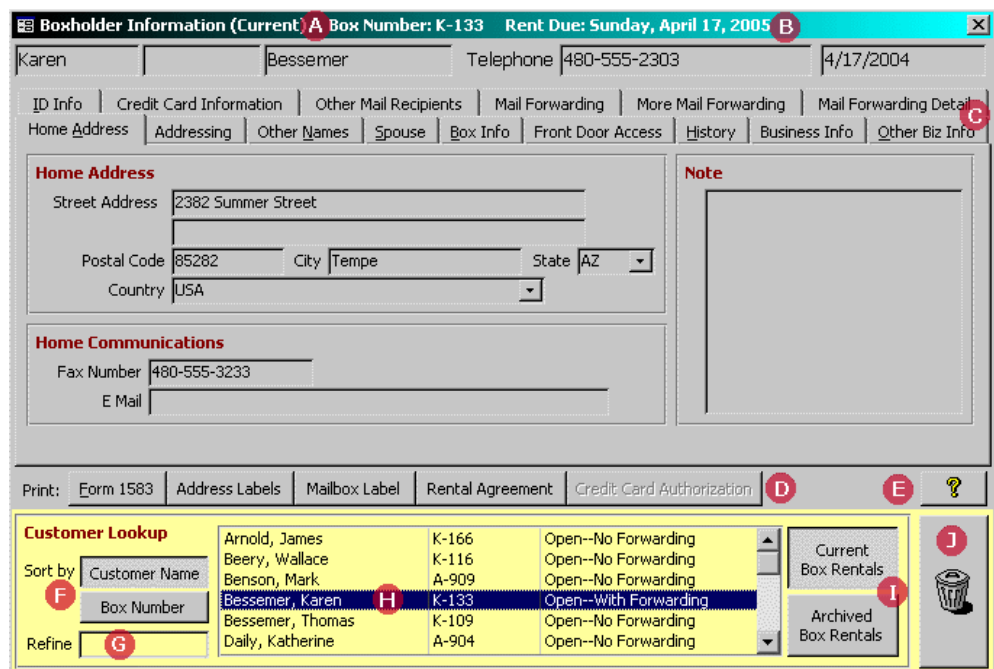
(B) The rent due date will appear in the title bar as well.

(C) The tabbed control in the middle of the Boxholder Information form contains all information about a boxholder.

(D) By clicking on any of these buttons, you will be able to print any of these reports for the boxholder. (E) Most forms within Simon have this button. By clicking on this button context-sensitive help will appear. This is help specifically on how to use this form.

(F) You can sort the list box at bullet H either by customer name or box number.

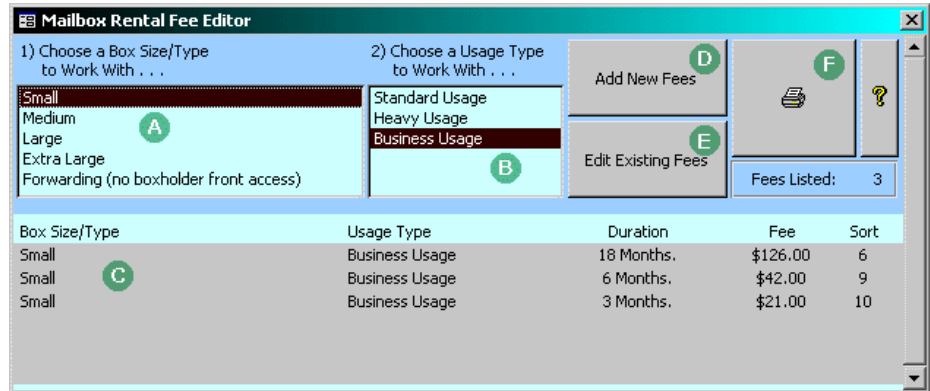
(G) You can refine the list box at bullet H only to show those boxholders who fit the criteria you entered in the Refine box.



- (H) Simply click on a listing in this list box to bring up the client you want to view.
- (I) You can toggle from current boxholders to those boxholders who no longer have a box at your business (archive).
- (J) You can delete boxholders from Simon from this form now. Though, it is warned against. The record for that client is gone, if you do, with no way to recover it.

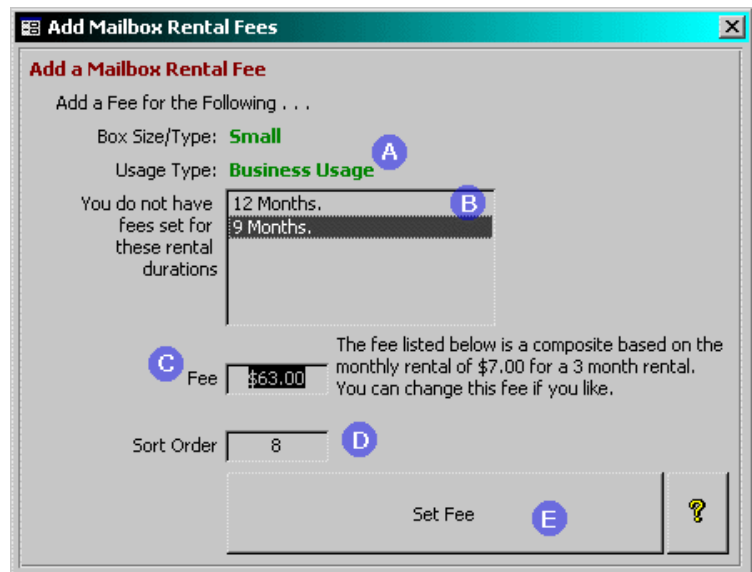
Mailbox Rental Fee Editor.

Another form that needed revision desperately. Since Simon allows you to set an almost unlimited number of different rental situations (over 6 million possibilities), the fee editor was unnecessarily complicated. We have finally found a solution to this dilemma. Check this out!



The below 'bulleted' list will match up to the lettered bullets in the Mailbox Rental Fee Editor image.

- (A) After opening this form, you should click on the box size/type you want to look at, or work with.
- (B) After opening this form, you should click on the usage type you want to look at, or work with.
- (C) A listing of the durations and fees set for the noted box size/type and usage type.
- (D) If not all durations are represented in the list at bullet C, you will be able to click on this button to add new fees. When the form appears for adding new fees, only those durations not represented will be available for setting fees. Simon does not allow you to set two fees for the same box size/type, usage type and duration. This would be considered ambiguous since Simon would not be able to figure out which fee you intend to use, since they would both be for the exact same situation.
- (E) If there is at least one fee listed in the area at bullet C, you will be able to click on this button to edit the existing fees.
- (F) You can print a report of all of the fees presently set up in Simon.



To add new fees, you should click on the 'Add New Fees' button.

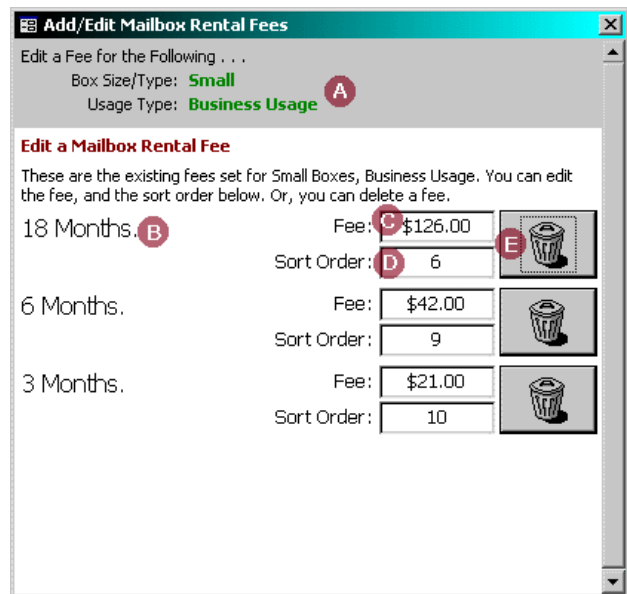
The below 'bulleted' list will match up to the lettered bullets in the Add Mailbox Rental Fees image.

- (A) Shows which box size/type and usage type you are working with.
- (B) To set a new fee, click on the duration you want to add to the box size/type and usage type shown at bullet A.
- (C) Once you click on the duration to which you want to add fees, a fee will appear that is based on the monthly rental for the shortest duration you have already set fees for to date. This way you will be able to discount the fee in the box at a rate you feel is appropriate for longer durations. In essence, it is always best to start adding fees for the shortest duration first so that Simon can help you determine rates, if you do not know what you will be charging in advance.
- (D) A sort order will be automatically generated based on the sort order for box size/type, usage type and duration set when you set these items in the Mailbox Rental Preferences area. Of course, you will be able to change this sort order if you like.
- (E) Click on this button to set the fee shown in the areas above.

To edit existing fees, you should click on the 'Edit Existing Fees' button.

The below 'bulleted' list will match up to the lettered bullets in the Edit Mailbox Rental Fees image.

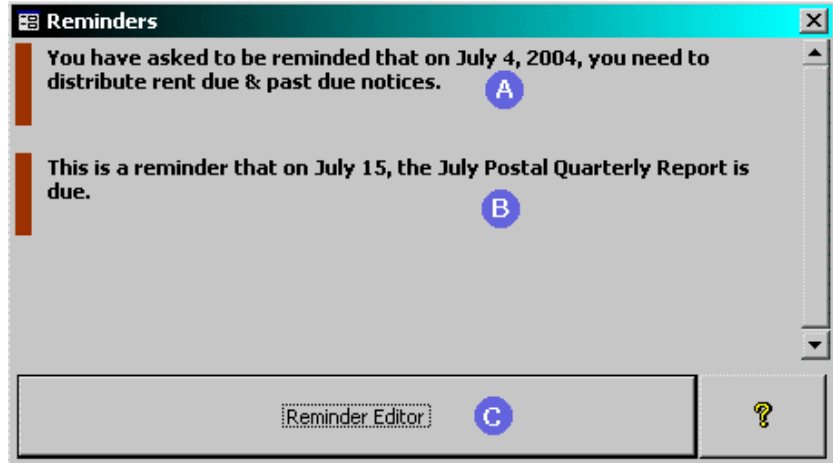
- (A) Shows which box size/type and usage type you are working with.
- (B) Shows the length of rental for size/types and usage types shown at bullet A.
- (C) You can edit the mailbox rental fee listed here.
- (D) You can edit the sort order listed here. The fee with the smaller sort number will appear at the top of the lists of fees.
- (E) You can delete this fee by clicking on this button. Please note that there will be no warning dialog box appearing if you click this button—the fee will just disappear. If you want it back, you will have to go into the Add a Fee area to add the fee back.



Reminders. Reminders appear automatically when you open Simon. The reminders system was certainly underpowered. You should be able to use the reminders area to set reminders that you can use too, rather than just a simple reminder that postal quarterly reports are due. It was always available for your use, but the interface was difficult to understand and use. Check this out!

The below 'bulleted' list will match up to the lettered bullets in the Reminders image.

(A) This is a reminder that on July 4th you want to distribute rent due and past due notices. This is what would be considered a one-time reminder that would be set several years, months, or weeks, in advance to spring up for the one day in the future when that date arrives. You will be able to tell Simon how many days in advance you want the reminders to start hitting the screen.



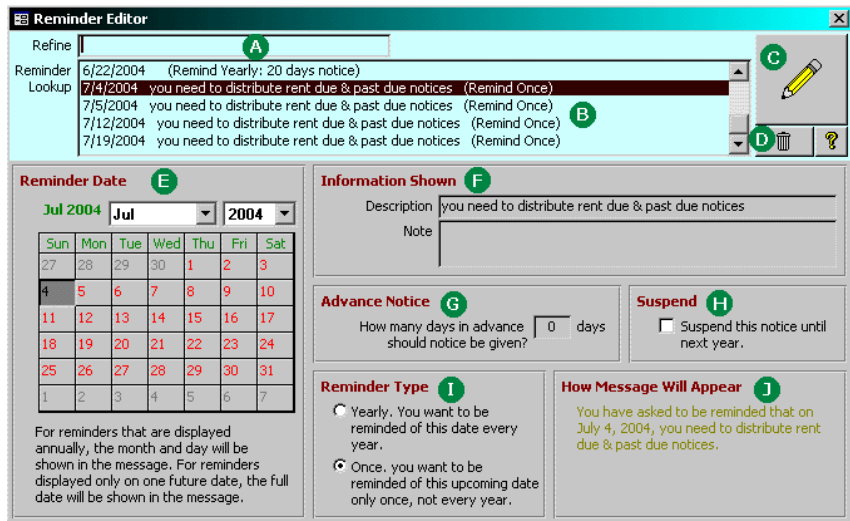
(B) This is the standard reminder that the July postal quarterly report is due on July 15th. This would be considered a yearly reminder that is set for a date in the past and will keep reminding year after year. Again, you will be able to tell Simon how many days in advance you want the reminders to start hitting the screen.

(C) Click on this button to open the Reminder Editor. The Reminder Editor will allow you to set new and unique reminders for anything you want.

To edit or add reminders to the Simon system, you should use the Reminders Editor. This tool can be reached from the Simon Helper, from the menu at the top of the Simon window, from the Reminders form, *etc.*

The below 'bulleted' list will match up to the lettered bullets in the Reminder Editor image.

(A) If you have scores of reminders set up in the system, you can use the Refine box to refine the list at bullet B to only show those reminders that fit the criteria you enter.



(B) Click on the reminder listing to view or edit it.

(C) You can click on this button to add new reminders to Simon. After clicking on this button, a form will appear with a list of default reminders that you might want to add to Simon reminders. For instance, one-time reminders for distributing rent and past due notices.

(D) You can delete the selected reminder.

(E) Select the date the event you want to be reminded of is scheduled. Please note that 'yearly' reminders can be set to a date in years past since the reminder will appear each year even if the year was 1997!

- (F) Enter the description and maybe a note that describes the reminder. A sample of the actual reminder content will appear at bullet J.
- (G) Enter the number of days you want advance notice that a date is approaching.
- (H) You check this box to suspend a reminder if you have already done it. Don't forget to uncheck it after the date of the reminder.
- (I) You can set reminders to happen every year or you can set the reminder to happen only once on or before a future date.
- (J) This is a sample of how the reminder will appear when the date arrives.

In bullet C above, default reminders are mentioned. The below form will allow you to set up your own default reminders that you can use to fill in the blanks when you add new reminders using the Reminder Editor.

The below 'bulleted' list will match up to the lettered bullets in the Reminder Defaults image.

(A) If you have scores of reminder defaults set up in the system, you can use the Refine box to refine the list at bullet B to only show those reminder defaults that fit the criteria you enter.

(B) Click on the reminder default listing to view or edit it.

(C) Enter the description and maybe a note that describes the reminder default. A sample of the actual reminder default content will appear at bullet G.

(D) Enter the number of days you want advance notice that a date is approaching.

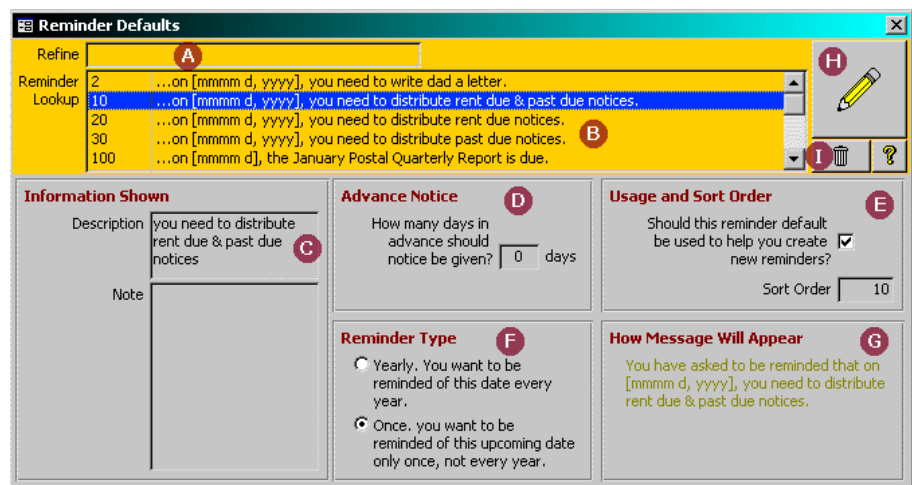
(E) If you do not want to use a particular reminder default (or, simply, it should not appear in the list when you click the add button in the Reminder Editor), uncheck this box. You can set the sort order so it appears in the list of defaults when you click the add button in the Reminder Editor.

(F) You can set reminders to happen every year or you can set the reminder to happen only once on or before a future date.

(G) This is a sample of how the reminder default will appear when you click the add button in the Reminder Editor.

(H) Add a new reminder default.

(I) Delete the selected reminder default.

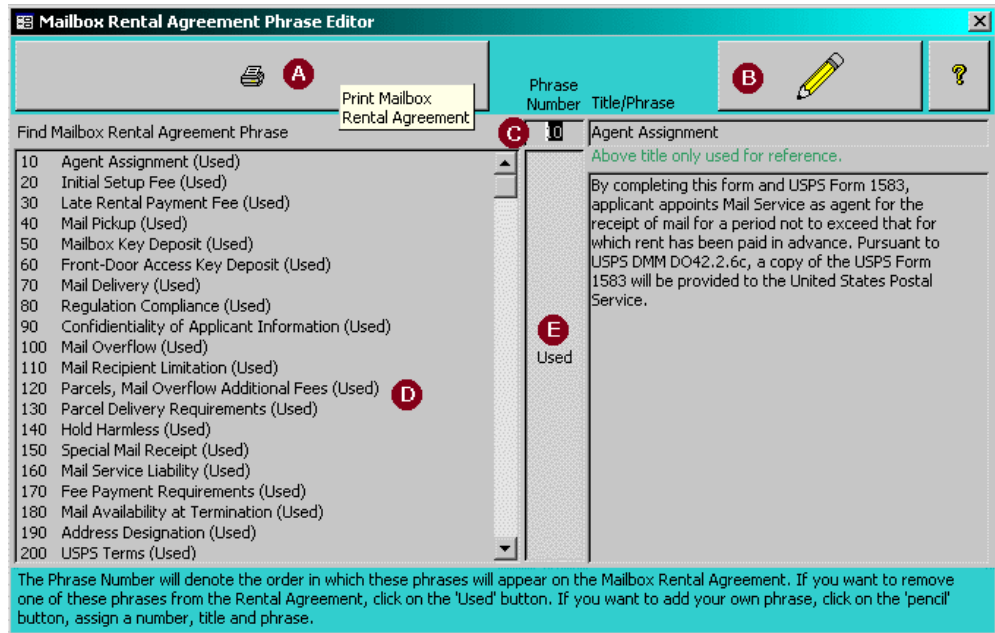


The information you add here will either appear to describe a default choice, or will fill the Reminder Editor with information that will be used in the new reminder.

Rental Agreement Phrase Editor. The Mailbox Rental Agreement Phrase Editor has been changed a lot. We wanted to improve this tool along with the user having the ability to individually print the rental agreement for each client when adding a new boxholder.

The below 'bulleted' list will match up to the lettered bullets in the Mailbox Rental Agreement Phrase Editor image.

(A) You can print the rental agreement by clicking this button. This rental agreement works with the chosen phrases as expressed by the bullet E choice as to whether it is being used or not, and sorted by the choice made at bullet C. This print out of the rental agreement is not specifically formatted for an individual client. If you want a rental agreement for a specific client, go to Boxholder Information and print it there.



(B) You can add a new phrase by clicking on this button. A new blank listing will appear where the Title and Phrase are blank. You should add a title and the actual phrase and then set a phrase number so that it falls somewhere between two phrase that already exist. Do not give it the same phrase number as one that already exists. Make sure it is set as Used; otherwise, it will not appear in the completed rental agreement.

(C) You should set the Phrase Number so that it falls between phrases on the list at bullet D where it will appear in the final document.

(D) By clicking on a phrase listed here, you will bring up that phrase to either view or edit.

(E) You can click on this button to toggle to "Used" or "Not Used". I think this is self-explanatory, like most everything else in Simon.

Well, that is the extent of what has been changed in Version 3. Most of the other changes are cosmetic and behind the scenes.

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
Transfer Hold as New Boxholder Customer rents mailbox after having it on hold
Boxholder Builder One-step tool for initially setting up your boxholders
Transfer Boxholder to Different Box A current boxholder moves to a different mailbox
Change Front-Door Access Changes a boxholders front-door access requirements
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
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

Step One: 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
Adding History Descriptions Add your own history descriptions

Step One: 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
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
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

Step One: Maintenance

Package Tracking Package auditing system
Quick Setup A walk-through on how to setup your store information
Box Number Creator Help to set up your mailbox numbering system
Daily Work Products What has been done during a specific day
Rotate Key Tumblers When someone failed to turn in their keys, need to change the lock
Undo a Rental Payment Able to delete payment made by mistake
Undo a Mail Forwarding Procedure Able to delete mail forwarding procedure made
Set Lock Combinations Set individual lock combinations and all lock combinations
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
Compact and Repair Databases Compacting and repairing Simon databases
Linked Table Manager Set data locations
Adding History Descriptions Adding your own history descriptions

Step One: Help

Consult Help Use to look up help articles
Show Reminders Remind you when things needs to be done
Reminder Editor Edit and add reminders
Reminder Defaults Edit and add default reminders that can be used to build reminders with the Reminder Editor
Show Tip Show a Quick tip
Create Your Own Tips Set up your own quick tips
Help Editor Create your own help articles

My First Simon Operation (beyond the initial options setup)

After you complete the initial options setup using the Preference Wizard, including mailbox rental pricing and box number setup, you will want to do something more interesting with Simon. Well, the first thing you will want to do is add a boxholder. 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 using the Preference Wizard 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. 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 business. 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 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. Click on Next Screen to move to Step 1 of the 'Add a New Boxholder' wizard if you haven't already done so.

Step 1: Transaction Date and Keys. After you have entered Step 1, you will notice that the date of the transaction is set at today's date. This will be apparent from looking at the calendar in the upper, left corner. If you are doing this operation as the customer stands in front of you, you will leave this date set and ask the customer 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 are 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 teal heading.

If the client wants 24-hour, front-door access, you should set these items here.

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.

After this has been accomplished, you should click on Next Screen.

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. 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
Postal Code:	83112 (city and state will be filled out automatically)
City:	Bedford
State:	WY
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, ID and Credit Card. 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 a requirement by the postal service, but I am pretty sure they are usually relaxed on this requirement.

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 having 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
Corporate Officers: Fred Flintstone, Barney Rubble
Firm Members: Fred Flintstone, Barney Rubble (will fill out automatically)
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 other mail recipients on this box. 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 address 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 DMM.

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.

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 9: 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 10: 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 Boxholder Information. Find the Fred Flintstone record and select it. Click on the trash can button and answer the various questions to get rid of Fred.

You will see that the first box you have in the system (the one you assigned to Fred), has been reset to Vacant.

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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