

Simon-Mailbox Rental & Mail Forwarding Management System, Version 2 Upgrade Notes

Finally, Simon V2 has arrived! It has taken a good deal of time getting all of the features and enhancements written into the Simon system (a lot longer than I had initially anticipated). I will outline below what we have done and give some information on how to get upgraded.

Warning: Do NOT attempt to upgrade without first reading this document.

Simon Version 2 Upgrade Requirements

You must have Simon installed on the machine that you want upgraded to Version 2 and the version of Simon presently running on this computer must be at revision 1.57, and running properly. If you need to find out what revision you are presently running, go into Simon and click on the **Help** menu and then choose **About This Software**. The revision number will be listed there along with the serial number of your software.

A window will appear that will tell you that you are at revision number 1.xx (the "xx" represents two numbers such as "53", "48", etc.). If you are at 1.57, or 1.57.00, you have met the requirement of being at revision 1.57. If the revision number is something other than 1.57, or a derivation thereof, as shown in the last sentence, you are at an older version than the last revision offered with version 1, and thus will need to get Simon up to date before upgrading to Version 2. If you are not at revision 1.57, follow the upgrading and unzipping instructions directly below. Any digits that appear in the revision number outside of the first three numerical digits are unimportant. For instance, if your software says you are 1.57.00 or 1.57.0, this is 1.57. You are ready to upgrade.

Before upgrading, you will also need to make sure that you have default mailbox rental pricing set up in the Preferences area. Go into Simon, click on the **Preferences** menu and choose **General Preferences**. Click on the **Mailbox Pricing** tab control and check to see if you have default rates set up there for all of the durations that you use at your store.

If you are indeed up to date with revision 1.57 and you have mailbox rental pricing as mentioned in the above paragraph, you are ready to upgrade to Version 2.

I am at a version prior to 1.56. What should I do?

If you are at a revision prior to 1.56, you will need to upgrade to 1.56 first. This is how it is done.

1. Close Simon, if the program is open.
2. Insert the new Version 2 upgrade CD into your CD reader on the computer where Simon is located. The Windows® autorun feature will automatically start the process by opening the B&L Associates Suite menu. If autorun does not start, you will need to navigate to the CD using Window Explorer and double click on the autorun.exe file.
3. Click on the **"Patches Folder"** item on the menu. A dialog box will appear showing you the patches folder on the CD.
4. Scroll through the list of files to find a file called **"s1_56b.exe"** or **"s1_56b"**. Once you find this file, double click on it.
5. A small dialog box will appear. Choose to Unzip. The 1.56 upgrade files will automatically be inserted into the "c:\simon" folder. If you have Simon installed somewhere other than the "c:\simon" folder, you should change the location where these files will be installed. Normally, you will not have to change anything, just hit Unzip.

6. Close the WinZip® dialog boxes. You are now upgraded to 1.56.
7. Leave the B&L Associates Suite menu open for the time being.
8. Open your Simon program and answer the questions that appear there. Check to make sure that Simon Version 1.56 is working as it should.
9. Close Simon once you are satisfied that everything is in working order.

I am at version 1.56. What should I do?

If you are at revision 1.56, you will need to upgrade to 1.57 before upgrading to Version 2. This is how it is done.

1. Close Simon, if the program is open.
2. Insert the new Version 2 upgrade CD into your CD reader on the computer where Simon is located. The Windows® autorun feature will automatically start the process by opening the B&L Associates Suite menu. If autorun does not start, you will need to navigate to the CD using Window Explorer and double click on the autorun.exe file.
3. Click on the "**Patches Folder**" item on the menu. A dialog box will appear showing you the patches folder on the CD.
4. Scroll through the list of files to find a file called "**s1_57.exe**" or "**s1_57**". Once you find this file, double click on it.
5. A small dialog box will appear. Choose to Unzip. The 1.57 upgrade files will automatically be inserted into the "c:\simon" folder. If you have Simon installed somewhere other than the "c:\simon" folder, you should change the location where these files will be installed. Normally, you will not have to change anything, just hit Unzip.
6. Close the WinZip® dialog boxes. You are now upgraded to 1.57.
7. Leave the B&L Associates Suite menu open for the time being.
8. Open your Simon program and check to make sure that Simon version 1.57 is working as it should.
9. Close Simon once you are satisfied that everything is in working order.

I am at version 1.57. What should I do?

If you are at revision 1.57, and everything is in working order, you are ready to upgrade to Simon Version 2.

Upgrading to Simon Version 2

We have supplied you with a CD which has the Simon Upgrade on it.

Close Simon and any other program you have running on your computer.

Insert the CD. The Windows® autorun feature will automatically start the process by opening the B&L Associates Suite menu so you can select the Simon Upgrade from the menu. If autorun does not start, you will need to navigate to the CD using Window Explorer and double click on the autorun.exe file.

Click on "Simon-Mailbox Rental & Mail Forwarding Program, Version 2 Upgrade." The install process will begin. Just follow the steps until it is complete. If you have installed Simon into a folder other than the "c:\simon" folder as suggested, you should tell the installer where your Simon program is located. This would be where Simon is running from, not necessarily where your data is located. You, more than likely, have installed Simon initially to the "c:\simon" folder, the data may be on your network.

A screen should appear when it is through telling you that the install process was successful and may suggest that you restart Windows. If this is the case, just go ahead and let the installer program restart Windows for you. Close the B&L Associates Suite menu window.

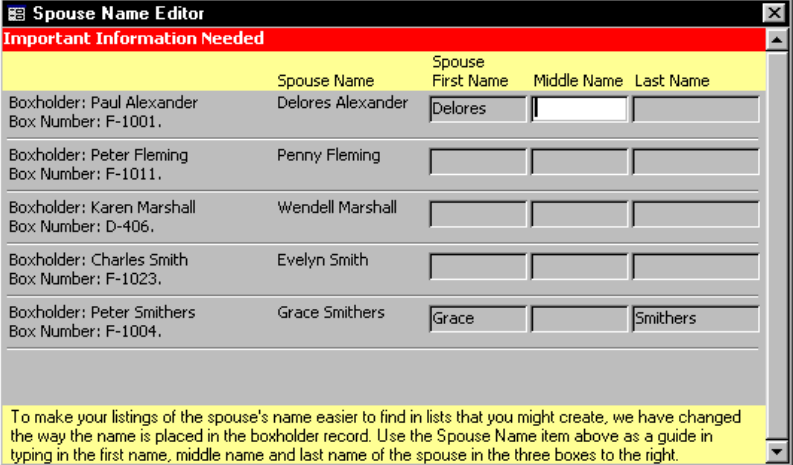
Opening Simon Version 2 For the First Time

When you open Simon Version 2 for the first time after upgrading, your data will be altered somewhat. Some new fields are added and a few new data areas are created. The reason for this is that in order to make certain new features work properly, we needed to keep more information about certain things, like the history kept for each client. We also had to create new tables to keep track of the other names that boxholders and other mail recipients might use when receiving mail. These adjustments will happen without a whole lot of work from you.

Be this as it may, certain areas will need your input to get things up to date. Hopefully, this will not take you too long to accomplish.

Spouse Name Editor

In Version 1, the spouse name was kept in one field. Silly me for writing it this way. Version 2 needed the name split out into first name, middle name and last name fields. This was done so that Simon can produce a better report of who might be receiving mail in a box. The way it was written in Version 1 would not allow proper sorting of mail recipients. When you open Simon for the first time after upgrading, you will be presented with a few windows where you can make these types of adjustments. One of the windows is called the Spouse Name Editor. You can scroll down through the list of spouses and retype the name in the fields on the right side of the form. See, **Figure 1**. By the way, those boxholders without spouses will not be included on this form. This should save you some time in getting this process done. By the way, this process will only have to be done this one time as Simon Version 2 will from now on use the three fields to keep spouse names.



The screenshot shows a window titled "Spouse Name Editor" with a red header "Important Information Needed". Below the header is a table with columns for "Spouse Name" and "Spouse" (subdivided into "First Name", "Middle Name", and "Last Name"). The table lists five boxholders with their names split into the three fields. A yellow note at the bottom of the window reads: "To make your listings of the spouse's name easier to find in lists that you might create, we have changed the way the name is placed in the boxholder record. Use the Spouse Name item above as a guide in typing in the first name, middle name and last name of the spouse in the three boxes to the right."

Boxholder: Box Number:	Spouse Name	Spouse		
		First Name	Middle Name	Last Name
Paul Alexander F-1001.	Delores Alexander	Delores		
Peter Fleming F-1011.	Penny Fleming			
Karen Marshall D-406.	Wendell Marshall			
Charles Smith F-1023.	Evelyn Smith			
Peter Smithers F-1004.	Grace Smithers	Grace		Smithers

Figure 1. The Spouse Name Editor is used to transfer the single fielded spouse name to the three available fields. You will have to do this manually since no program could accurately do this without introducing errors.

If for some reason you do not have time to work through all of the name adjustments that are required for Version 2, you can close these windows and reopen them later when you have more time. All of these name adjustment tools can be found by clicking on the **Tools** menu and looking under **Temporary Tools**.

Other Name Editors

The Spouse Name Editor is pretty straight forward. The two other name editors (one for other names that might be used by the boxholder and his or her immediate family, and the other for names that might be used by the "occupant"). Occupant is synonymous with other mail recipients (someone not a member of the boxholders immediate family but may receive mail in the box, thus requiring a separate 1583).

Just like the spouse name, the other names field was just one field. The difference is that a spouse has but one name, whereas the other names field may contain many names. In fact a spouse would be listed in the spouse field, but there is nothing that says that the spouse cannot be listed in the other names area too, as well as children that might receive mail and other names that they might go by, *i.e.*, a spouse may be named Peggy Marston, but may be listed in the other names field as Margaret Marston since she gets mail under that name as well.

The point is, the Spouse Name Editor deals with one name, where the Other Names Editors may consist of many names within the one field.

As shown in **Figure 2**, the boxholder is John Smith. As noted by bullet 1, he appears to have four children, Frank, Walter, Becky and Randolph. Bullet 2 shows the area where you will be adding the names of the other mail recipients. Bullet 3 shows the names after you have typed them in as they will appear on the 1583. And, last but not least, bullet 4 shows the buttons that you can click to move forward through the records, or backwards. Both the Other Names Editor and the Occupant Other Names Editor are similar in design, so I will not show the Occupant Other Names Editor here.

Once you have worked your way through all of the boxholders listed on the Other Name Editor form, you are finished and you will not have to ever do this again. This also holds true for the Spouse Name Editor. Once you are through with all of the other names, you will no longer have to do this as Simon will in the future only use the new fields to house the names of the other names and the spouses.

Usage & Mail Notice Editor

The Usage & Mail Notice Editor will appear the first time you enter Simon after upgrading, but you may not be able to do much with this form yet. It is here primarily just to remind you that it does exist. Why? Once you have set other usage codes for differing usages, you may want to use this form to set certain boxholders to use different rate scales.

Maybe an explanation of what I am talking about here will help you understand this evolution of Simon mailbox rental pricing.

With Version 2, you can set different rates based on three different criteria. Two of which will be no stranger to you. The size/type of box the customer is renting and the duration for which they want to rent said box. The third is the type of usage they will need. This is rather arbitrary, but you may want to give some thought on the types of box renters you have. Are the business box users costing you extra for all of the time your people need to service their needs. Or, do they use more of your other services to augment their extra costs. Would you like to set lower rates for business users to steer business users to your store? Usage, as you can see, may open up some interesting marketing opportunities for you.

By opening up mailbox rental pricing in the way we have, you are no longer limited to just setting rates for the four durations, 1 month, 3 months, 6 months and 12 months, that were available in Version 1. You can set your own durations any way you like.

Other Name Editor

Important Information Needed

Boxholder: John Smith
 Company: Frank Smith; Walter Smith; Becky Smith; Randolph
 Box Number: A-103

Other Names: (these are the names you have listed in the Other Names box for the listed boxholder)
 Frank Smith, Walter Smith, Becky Smith, Randolph Smith

First Name	Middle Name	Last Name	Company Name
Frank		Smith	
Walter		Smith	
Becky		Smith	
Randolph			

We have changed the way Simon keeps track of the names that might be receiving mail in any given box. Before it was simply one box that contained all names (see raised blue box above). This was problematic as you could not alphabetize a list of everyone receiving mail. You need to add the people and company names from the blue area to the area below the light green bar. Use the finger buttons to navigate to and from boxholder records. This is a one-time task.

Figure 2. The Other Name Editor and the Occupant Other Name Editor has to deal with the possibility that there might be more than one name that the boxholder, spouse, children, other mail recipients might use to receive mail.

Usage & Mail Notice Editor

A-101	Gary Lindquist--B&L Associ	SU	No
A-102	Jerry Smith	SU	No
A-103	John Smith	SU	No
A-104	Wendell Franks	SU	No
A-105	Quincy Smith	SU	No
A-106	Sam Schenker	SU	No
A-107	Randy Randolph	SU	No
A-109	Barney Rubble	SU	No
A-110	Patty Englehart	SU	No
A-124	Laurence Davidson	SU	No
B-201	Nancy Barnes	SU	No
B-202	Orson Welles	SU	No
C-301	James Johnson	SU	No
C-302	Denny Way	SU	No
C-303	Mike Smith	SU	No
C-304	Adam Albers	SU	No
C-305	Jimmy Smithers	SU	No

Boxholder Name **Gary Lindquist--B&L Associates**

Box Number **A-101**
 Box Size **5**

Mailbox Rental Fees

Duration	Fee
1 Month.	\$10.00
3 Months.	\$28.00
6 Months.	\$52.00
12 Months.	\$98.00

Usage Code **SU**

Check this box if this boxholder will need to have past due and rent due notices done by letter/mail.

Figure 3. The Usage & Mail Notice Editor can be used to change the type of usage at which a boxholder will be charged and will allow you to set whether or not rent due and past due notices should be done by letter, instead of slip.

Once you have told Simon that you want to set different usage levels for the durations and box size/types you have at your store, and then set pricing as outlined in the section below, you will want to revisit this form to adjust the boxholders to fit their needs.

As illustrated in **Figure 3**, bullet 1 shows a list of the boxholders you have at your store. Any boxholder on this list can be selected simply by clicking on the boxholder's name. Then, you will be able to change the usage for the boxholder and set whether or not they should receive a letter when rent is due or past due (if there is no check in the box, slips that you can put in their box are created when rent is due and past due). Bullet 2 shows the present rates for this boxholder. Bullet 3 is where you change the usage for the boxholder (you will have to set up different usages within the Preferences area before doing this since only Standard Usage (SU) is created by the upgrade process). Bullet 4 is where you can check the check box if a boxholder does

not check his or her mail by coming into your store and you want Simon to create rent due and past due notice letters, instead of slips.



Figure 4. Simon button bar layout.

Remember, if for some reason you do not have time to work through all of the Usage & Mail Notice Editor stuff, you can revisit it by clicking on the **Tools** menu and looking under **Temporary Tools**.

That's it for the tools that will appear upon first opening Simon after the Version 2 upgrade.

New Features and Enhancements

Simon has changed quite a bit over the years, but not nearly as much as it has changed with this Version 2. I will outline below what has been changed, added and enhanced. See, **Figure 4**. New button bar items will appear below in blue text.

New Tools on the Button Bar. The order in which the buttons appear on the button bar hasn't changed all that much. There are, however, a few additions. The buttons do the following:

1. Simon Helper. Used to bring up a launching pad for many different operations within Simon. We are all very familiar with this form.
2. Boxholder Information. A form that will allow you to view all information about any current boxholder. Most of this information is editable. There is a similar tool that you can find from the **Process** menu, under **Boxholders**, called **Boxholder Information (Archive)**, that will show you boxholders who have closed their boxes, and all of their information.
3. Add a New Boxholder. A form that will send you off to either the Boxholder Builder (minimal information gatherer) or the full-fledged add a new boxholder step-through wizard. The Boxholder Builder has been significantly modified.

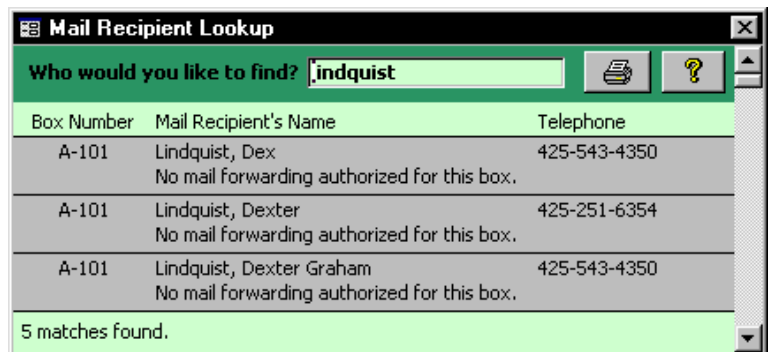


Figure 5. The Simon Mail Recipient Lookup form will help you quickly and easily find those mail recipients that you are unfamiliar with. Just type a term in the box at the top and tab out of the box to get a listing of those matching the criteria in the top box.

4. Rent Due and Past Due Notices. A form where you can generate rent due and past due slips, letters and credit card report and hold mail forms. This tool has been significantly modified.
5. Mailbox Rental Payments. A form where you can do multiple mailbox rental payments (batch operations). This is a new tool that was added by request. This form will be discussed in more detail on page 8.
6. Mail Recipient Lookup. A form that you can use to find unfamiliar mail recipients be they boxholders, spouses, children of the boxholder, other names used by same, other mail recipients with 1583s on file and other names they might use. See, **Figure 5**.
7. Mailbox Rent Due Date Lookup. This form will show you who a box is rented to, the date when rent is next due and if you have credit card authorization to automatically bill mailbox rents on their mailbox. See, **Figure 6**.
8. Sales Reports. Various sales reports menu. Sales reporting has changed somewhat to offer even more great information. Also, the invoicing has changed quite a bit to make it more accurate and definitely more sure footed.
9. Rent Due Dates Worksheet. These worksheets have been altered so that you will be able to create full worksheets or just worksheets of those due now or those who will be coming due real soon. You will also be able to sort these worksheets by due date, boxholder or box number.
10. Customer Due Dates Menu. This form will show you who is due, or soon to be due and will allow you to produce a report.
11. Mailboxes To Be Closed. This form will show you those boxholders who are past due. From this form you will be able to close their box or add a payment.
12. Customer History Report Menu. From here you will be able to create reports of a single customer's history or all history for all boxholders, present and closed.
13. Cut, Copy, Paste and Undo tools. These are the standard Windows® tools that you will find within most Windows® programs.
14. General Preferences. This form will allow you to set general options for running your mailbox rental business.
15. Mailbox Rental Preferences. This form will allow you to set mailbox rental options for running your mailbox rental business.
16. Mail Forwarding Preferences. This form will allow you to set mail forwarding options for running your mail forwarding business.

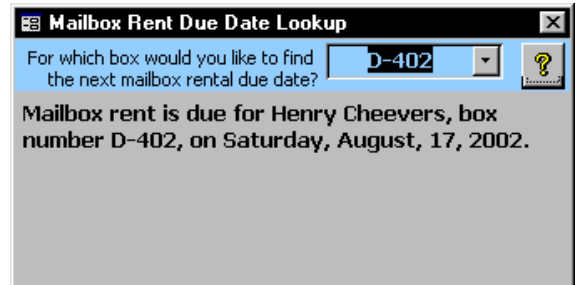


Figure 6. The Simon Mailbox Rent Due Date Lookup form will show you the date rent is next due for a specific boxholder. Simply find the box number in the combo box at the top of the form to bring up the next due date.

- Note:** All Simon options use to be on one preferences form. They have been broken down into three areas as noted above due to the breadth of options that are available to you. You will want to visit each of these forms to see what new options you can set for your business. For instance, you can set late fees based on how late the boxholder is with their rents. You have four levels of lateness you can set.
17. Box Number Tools. This button will bring up a menu where you can choose from three different box number tools.
 18. Help Index. This help index will show you hundreds of help articles that you can read to help you better understand how Simon works. You can also click on the yellow question mark button on most forms within Simon to bring up help for that specific form.

Sales Reports. The form that will appear when you want sales reports has changed significantly. You will now have much better control over the type and amount of data you want in a sales report and the duration for which to create the report. It was suggested that we add to this reporting system information about how many boxes were rented during a particular period, closed boxes, etc. We have done this. Also, the reports, such as this one, will come up in preview mode. If you decide that it is unnecessary to print the report, you can just close the preview window without printing the report. All reports within Simon will be done in preview first. To

print a previewed report, just click on the printer button on the button bar and then close the report.

Due Dates Worksheets. We have had a number of clients ask that they be able to create worksheets that only show currently due people. This is now possible. And, you can also sort the worksheet by due date, boxholder name and box number.

History and Mail Forwarding Detail History Description Modification. We have created a new tool called the History Description Editor where you can write up short history lines that you will be able to use when adding history manually to a customer's record. Of course, Simon will still use the history lines that it has always used, but now you can create special history descriptions. You can also make these history descriptions taxable. You will also be able to modify and delete the history descriptions you create, but not the default ones that Simon comes packed with.

Mail Forwarding Fees. You have always been able to charge a special mail forwarding fee above and beyond the mailbox rent. This was a monthly fee that was tacked on to the mailbox rent. This fee still exists, but we have also added a fee that you can charge each time you forward mail to a client. Look under **Mail Forwarding Preferences** for this.

Rent Due and Past Due Notices. For those of you who made suggestions about changing the way Simon does rent due and past due notices, you all owe me big time! The process for dealing with this aspect of Simon was very tedious and complex. I have added much more control over how this can be done. The choices noted in the box bulleted as 1 have not changed. Didn't need to be changed. However, the area noted in the box bulleted as 2 did need changing. You will now have five choices to make here, with the default choice still being **"Current."** See, **Figure 7.**

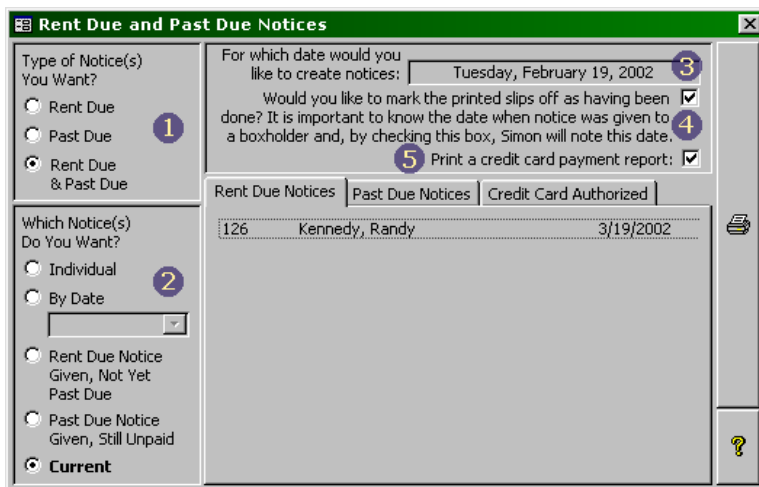


Figure 7. Rent Due and Past Due Notices has changed a lot. You will have much more control over how notices are given with Version 2.

The **"Individual"** choice has not changed. This choice will create a rent due slip or letter for the boxholder you choose from the lists. This will be the last notice you delivered to this individual (if you had the date added to the history for that due item by checking the check box next to bullet 4).

The **"By Date"** choice also hasn't changed. This choice will allow you to print notices that were distributed on a specific date that you select from the list of dates. Only dates where slips were distributed will be on the list. Of course, only slips that were marked as distributed will appear here. This is a good reason to always check the check box next to bullet 4 so the history is marked with the date notice was distributed.

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. In Version 1, you had no choice. This date was always set. We suggest that you do let Simon mark a record as having been given notice.

Bullet 5 works with a new feature we have added to Simon. You can set a boxholder as having authorized you to charge their credit card for mailbox rental payments. If you have a boxholder's record set in this way, you will be able to create a report of those who have given you authorization, so you can then process their card. If you do not have any customers who are doing this, you may want to uncheck this item, though it is not necessary to do so.

Rent Due and Rent Past Due Slips.

We have received quite a few requests that our rent due and past due slips be made bigger. We did just that. The rent due slip will be three per page, instead of six; and the past due slip will be two per page, instead of six. These slips will also give a lot more information as you will be able to see from **Figure 8**.

Making Batch Mailbox Rental Payments.

Several people requested that we create a form where "batch" mailbox rental payments can be made. See, **Figure 9**. This new 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 9**. 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.

Mailbox Limbo
6644 South 196th Street Suite T100
Kent WA 98032 USA
425-251-6354

MAILBOX RENT DUE

PLEASE RETURN THIS NOTICE WITH FEES

D-404 **X**
Box Number Box Size

Date Mailbox Rent Due
Sunday, February 3, 2002

Date This Slip Distributed
Tuesday, February 12, 2002

Duration	M/F Fee	Rent	Tax	Total
<input type="checkbox"/> 1 Month	\$1.00	\$50.00	\$4.44	\$55.44
<input type="checkbox"/> 3 Months	\$3.00	\$130.00	\$11.57	\$144.57
<input type="checkbox"/> 6 Months	\$6.00	\$240.00	\$21.40	\$267.40
<input type="checkbox"/> 12 Months	\$12.00	\$400.00	\$35.84	\$447.84

If you fail to pay your mailbox rent as noted above, on or before February 3, 2002, prices will be subject to late fees as follows: \$5.00 (late).

Since you are having us forward your mail for you, we have added our \$1.00 monthly mail forwarding fee to the above fee listing.

Larry Livingston
5954 SE 54th Street
Kent, WA 98032 USA
Telephone: 425-555-4034
Email:

Check the above information for accuracy, if there are any changes to be made or if there are blanks to be filled in, please make the changes on this slip and give it to us the next time you come in.

Mailbox Limbo
6644 South 196th Street Suite T100
Kent WA 98032 USA
425-251-6354

MAILBOX RENT PAST DUE

PLEASE RETURN THIS NOTICE WITH FEES

E-518 **S**
Box Number Box Size

Date Mailbox Rent Due: Saturday, January 19, 2002
Date This Past Due Slip Distributed: Tuesday, February 12, 2002

Duration	M/F Fee	Rent	Late Fee	Tax	Total
<input type="checkbox"/> 1 Month	\$1.00	\$10.00	\$5.00	\$0.96	\$17.39
<input type="checkbox"/> 3 Months	\$3.00	\$28.00	\$5.00	\$2.70	\$39.13
<input type="checkbox"/> 6 Months	\$6.00	\$52.00	\$5.00	\$5.05	\$68.48
<input type="checkbox"/> 12 Months	\$12.00	\$98.00	\$5.00	\$9.57	\$125.01

Since you are late with your payment for mailbox rent, a \$5.00 late fee has been added to the amount owed.

Since you are having us forward your mail for you, we have added our \$1.00 monthly mail forwarding fee to the above fee listing.

MAIL IS BEING HELD PENDING PAYMENT OF MAILBOX RENT
PLEASE REMIT PAYMENT PROMPTLY

If the box rent is not paid within 31 days from the due date, your mailbox will be closed and any contents removed. Any deposits will be forfeited and any mail for you will be disposed of at our discretion without postal regulations.

John Smith
8832 SE 54th Street
Renton, WA 98055 USA
Telephone: 425-555-5403
Email:

Check the above information for accuracy, if there are any changes to be made or if there are blanks to be filled in, please make the changes on this slip and give it to us the next time you come in.

Figure 8. The new Simon rent due and past due slips.

Late Mailbox Rental Payment Fees.

With Version 1, you could only set one late fee amount. In Version 2, you can set late fees based on how late the boxholder is with their mailbox rental payment. These late fees can be set from the Mailbox Rental Store Preferences area under timings. And, you can set the threshold days where the fees increase.

New Mailbox Rental Fee Structure.

Probably the biggest change we made was how fees are set for mailbox rentals. With Version 1, the fees were based on two factors. One, the size or type of box the customer is renting and, two, the duration for which they want to rent. Four durations were allowed and six sizes. In the preferences area you set the fees you want to charge for each size/type and duration. These fees are the default values that would be saved with each boxholders information. Once these fees are set for a boxholder, you could change the fees in the boxholder's record or leave them at the default value. This system would not, however, allow much flexibility in how rates are set at your store. So, we changed this fee structure dramatically.

In Version 2, you can set your own box size/types, durations and a new variable the usage level. It is available, but you needn't use it. But, 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 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 to use.

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 and create a new size type called "Jumbo." In the blank spaces under "Package Drop Only..." let's add a box code of "Z," box description of "Jumbo," sort order of 5 and change the sort numbers for "Forwarding..." and Package Drop..." to 6 and 7 respectively, and set "Available?" to yes by checking the box. Let's also go to the "Usage Levels" tab and check the "Business Usage" item as being available. Finally, let's add a new rental duration or two. Click on the "Rental Duration" tab, at the bottom of the

Date	Description	Rent Amount
2/12/2002	RENEWAL: 6 months.	\$52.00
2/12/2002	DUE: Mail forwarding fee.	\$6.00
10/30/2002	DUE: Mailbox rent.	\$0.00
2/12/2002	M/R: WA Sales Tax	\$5.05
Total Due:		\$63.05

Figure 9. The Mailbox Rental Payment form is best used for making batch payments.

Box Size/Type	Usage	Duration	Mailbox Rental Fee	Sort Order
Jumbo	Business Usage	6 Months	\$150.00	1
Jumbo	Business Usage	12 Months	\$270.00	2
Jumbo	Business Usage	18 Months	\$380.00	3
Jumbo	Business Usage	24 Months	\$480.00	4
			\$0.00	99

Figure 10. 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.

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.", soft order of 6 and make it available as well. Now we should be able to set rates for jumbo boxes as either standard or business usage, with durations up to 24 months.

Close the Mailbox Rental Store Preferences form and 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 10** 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 for 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 10**. 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.

The New Box Number Creator. Since we do not have our "Jumbo" boxes physically set up within Simon, we will have to do so. In Version 1 we had two tools for setting up box numbers. The first was used when initially setting up boxes, the second was used to add boxes to a preexisting system. The new tool does either task perfectly. No need for two separate tools to do this. This tool is called the Box Number Creator.

Some changes have been made to the way Simon does boxes. You are no longer limited to box "numbers." A Number being any number between 1 and several billion. You can now add prefix of suffix characters to the actual number. I had heard of this being done, though it is not particularly common. In any event, Simon can handle this eventuality now.

As shown in **Figure 11**, 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.

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.

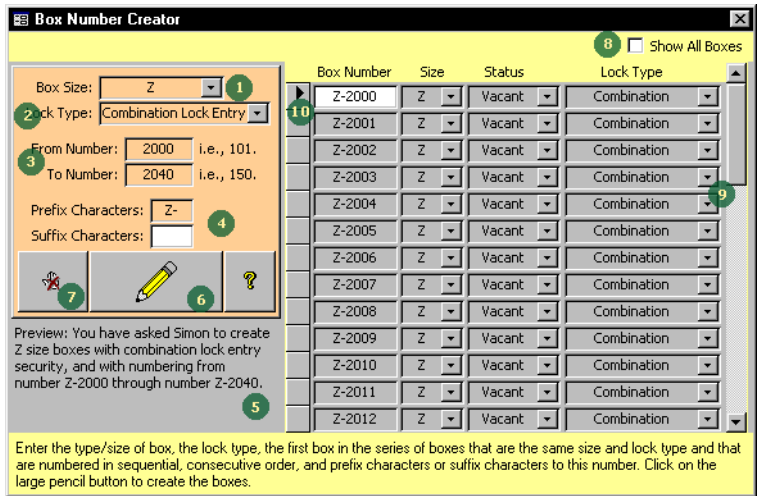


Figure 11. The Box Number Creator is a great tool for setting up your box numbers into the Simon system. Yes, Simon want to know what boxes you have available so he can keep track of keys, warn you when your key tumblers need changing, ro combinations need changing and which ones are occupied or vacant.

Rent Due and Past Due Notices By Mail. Each of your boxholder records can be set so that they will receive letter notice that their box is due or past due, rather than the simple slip that you insert into their mailbox. When you set up a new boxholder, you simply check the check box that asks you if you want notices done by letter. You can also set this option by going to Boxholder Information, look up the boxholder you want to set as getting a letter, navigating to the Box Information page and checking the appropriate check box.

Rent Due and Past Due Payment By Credit Card. You can now set a boxholders record to charge a boxholder's credit card for mailbox rental payment. When you create your notices, Simon will produce a report showing you who should be charged for box rents. After you have charged the card, you should go into Simon to make the actual payment for the boxholder so his or her record will be up to date.

That's about it. There are more changes that we made to Simon, but I do want to finish this documents so we can get Simon distributed. A few last minute things that might be helpful to you.

How To Move Large Files From One Computer To Another

It is not uncommon that you will have instances when you need to move large files from one computer to another. Our downloads for most of our programs are too large to be placed on a diskette. I would like to offer a recommendation that will save you money in the long run than having us supply you with a CD every time we upgrade. I would suggest that you invest in a portable Zip drive for moving large files from machine to machine. This is an external model that either comes with USB or parallel interface, or both. For older machines, I would suggest the parallel interface as not all computers are USB equipped. The parallel interfaced Zip drive uses a standard printer cable to plug directly into the same port where your computer's printer is connected.

Protecting Your Current Simon Program

There are two extremely important reasons for doing what I am about to outline. The first reason is so that if something were to go wrong with your attempt at upgrading, you can go back to using your prior-to-upgrading version of Simon until

we can help you get your upgrade fixed. I have tested this over and over again so there shouldn't be any problems unless you fail to follow the instructions herein.

1. Close Simon and any other programs you may have running.
2. On the desktop screen, RIGHT click on the My Computer icon.
3. A shortcut menu should appear, choose Explore from the shortcut menu. The two-paned Exploring window will appear.
4. Find your "C:" drive in the left pane and click on the folder icon next to it.
5. Find the "Simon" folder in the right pane and right click on the "Simon" folder icon.
6. Hold down the Control "CTRL" button on you keyboard while simultaneously hitting the "C" key (copy) and then (still holding down the CTRL button) the "V" key (paste). This will create a copy of the "Simon" folder called "Copy of Simon."
7. Find the "Copy of Simon" folder, RIGHT click on the "Copy of Simon" folder.
8. From the shortcut menu, choose to Rename. Type "SimonXXX" exchanging the "XXX" with the version you are upgrading FROM. For instance, if you are upgrading FROM revision number 1.53, rename the folder "Simon153."
9. Hit the ENTER key to make sure the new name holds.

Now, if things should go wrong when doing an upgrade, you can always go back to what you had before unzipping the files. This holds true with any upgrade within a version, such as an upgrade from 1.56 to 1.57. With a version change such as that which you will be doing when you move from 1.57 to 2.xx.xx, you will not be able to back up to 1.57.