



# Simon--Mailbox Rental and Mail Forwarding Management System for Windows, Version 1

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Management System for Windows, Version 1

## User's Manual

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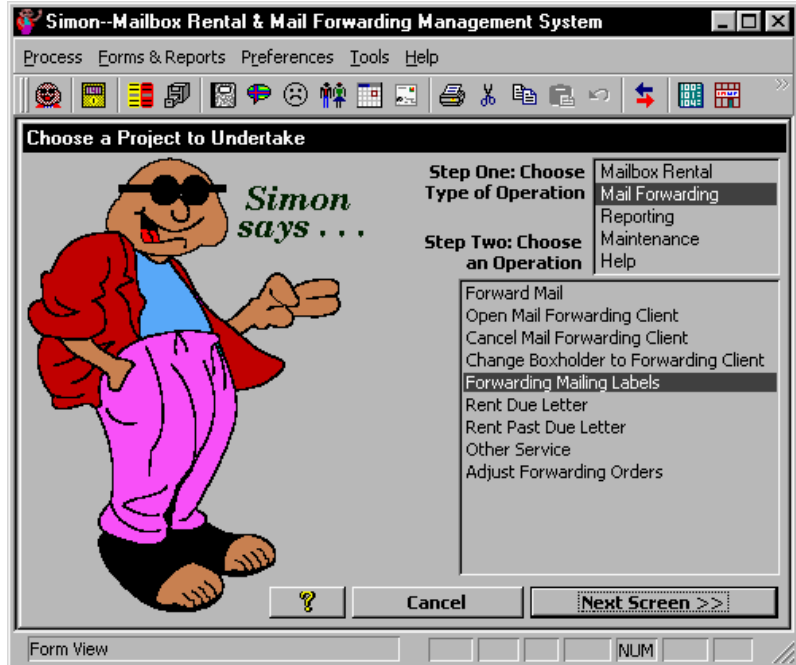
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## Chapter One: Getting Started

### System Requirements

To use the Simon–Mailbox Rental & Mail Forwarding Management system (hereinafter referred to as Simon), you must have the following minimum configuration:

- g IBM PC or compatible 486-66MHz or faster (recommend Pentium 200MHz).
- g Microsoft Windows 95 or later.
- g 16 MB RAM (recommend 32 MB, or better yet, 64).

### Installing Simon

More than likely, you have received a CD from us that you would like to install (probably a trial version since we do this quite a bit).

1. Exit any applications you are running including toolbars, memory management programs, screen savers, and virus protection programs.
2. Insert the CD-ROM into your CD drive. The Windows 95/98 autorun feature will cause the Normal Forms Suite installer screen to be displayed. If the Normal Forms Suite installer screen does not display, click the Start button on the Windows 95/98 desktop and choose Run from the menu. Type [CD-ROM Drive Letter]:\setup, and then click on OK.
3. From the Normal Forms menu click on the text line reading “Simon. . .”. The install program will start by giving you some options for installation. You will be asked into which folder to install the program. The **c:\simon** folder is offered and our best recommendation is to choose this folder, though starting with revision 1.52, you will be able to install Simon anywhere you choose. Installing to any other folder or hard drive will require Simon to relink the data databases with the program. This is an automatic process, but does require the system to work a bit harder (the one time it has to do the relinking).

**WARNING:** If you have Access 2000 installed on your computer and have it located in the folder that Microsoft suggested during installation, you will more than likely have problems installing Simon, or any of our programs. In order to avoid these problems, please read about the problem and follow the installation steps outlined on Page 73.

Also, the Normal Forms Suite installer menu works best if your monitor is set to handle more than the minimum 16 colors. If indeed you do have your monitor set for 16 colors, you will see an entirely white screen. Be this as it may, you should still be able to install any of the programs in the Suite by moving the mouse within the menu screen until you see the “Simon...” language and then click.

Once you have a registered copy of Simon, you will be able to go to our patches area on our Web site at <http://www.bnl.com/normalforms> to download patches for Simon. We will usually give you notifications by email when a patch is available, but this is not an absolute

certainty. If you want the best possible experience with Simon it is up to you to check the patches area for updates. These updates will not only fix problems that we find, and that clients find, but will also add new features that you will probably want. Like right now (May 18, 2000), we have a patch available (revision 1.55) that adds the ability to do rent due and past due notices as letters (rather than just slips), and expands the capability of the rent due and past due process, and adds a report on the vacant boxes in your system. To find out what revision your software is at, check under the Menu item and choose About... to show a dialog box that will contain the revision number and a few other important tidbits of information.

### **Patches and Safe Installation of These Patches**

The patches that we create for Simon are usually of a fairly innocuous sort. Typically, they cannot cause damage to your present Simon setup. However, there are times, and we do warn you when these times exist, that the patch is of the destructive type. Usually, when the patch will create new fields in your already existing data files. This is a bit dangerous at times, but if your system is set up with the proper files to do the work, they should work fine.

If however, your system does not have the correct files (now these are Windows files, not Simon files), running such a patch can leave things only sort of installed properly, but not complete and Simon may not like the new arrangements.

The best way to safeguard against such a mishap is to make a backup of the entire Simon folder before you unzip the patch files. Simple enough.

Here's how you do this. Double click on My Computer, double click on the C drive (or whatever drive you have located Simon when installing Simon). Find the Simon folder in the list of folder and single click on this folder—this will select the folder. Once it is selected, hold down the Control (Ctrl) button and hit C and then V. This will copy (C) and then paste (V) the folder. Now, you should find the “Copy of Simon” folder on the hard drive to make sure it is there. Once you have found it, you needn't do anything to it, you are just making sure that it is there for safety's sake.

Now, download the patch, or patches, and unzip them. This can be done by simply going to the Web site, find the patches you want and clicking on them one at a time. A few dialog boxes will appear and you should just have the files saved to your hard drive (somewhere where you can find them again). Once they are on your hard drive, find them with the My Computer tool (as you did about with the Simon folder), and double click on each file. A few more dialog boxes will appear and you should unzip them to the Simon folder (not the Copy of...). This should all have happened without incident. If you have run into an error up through this point, the file more than likely did not download properly. Go download the file again.

The first time you enter Simon after a download/unzip will be the test to whether things are working as they should. If you run into problems doing a few operations, give us a call. We will be able to determine whether there is a problem with the download or if the situation requires that you start over again.

If the situation requires that you go back to your old data, it is a simple matter to go back and set your system up as it was before the patches were installed.

Here is how you will do this, if the situation warrants it. Go back into My Computer, find the Simon folder and right click on it. A menu should appear with Delete listed therein. Click on Delete and answer yes. Simon has been deleted. Find the Copy of Simon folder. Right click on it. Choose Rename from the menu that appears. Type Simon as the new name and then hit enter. Copy of Simon is renamed to Simon and we are back to where we were before installing the patch.

Do give us a call if things do not go smoothly on this so that we can help you get matters resolved.

### **Uninstalling Simon**

You can uninstall Simon by using the tools provided with the Windows 95/98 operating system. Open the Control Panel, double-click on Add/Remove Programs, select Simon, and click Remove. After uninstalling Simon, go back to My Computer, navigate to the drive where Simon is located, find the Simon folder and delete it.

### **Opening and Configuring Simon For the First Time**

After you have installed Simon, double-click on the Simon icon to open it. This icon can be found by following Start/Programs/Simon... Please note that when you open the Simon group, you will see a lot of icons. All of these icons, except for the one called Simon, do repair functions to different parts of the Simon data package. Most of the time, you will not be using any of the icons within this group except the Simon icon. However, repairing will also compact a data file that seems to be getting too big for its britches. Of course, you won't know this unless you are willing to go into the Simon folder and look at the actual files: an.mdb, box.mdb, dta.mdb, *etc.*



If you have installed Simon to the default folder, you will be given a number of dialog boxes where you will be asked to set up Simon specifically for your store. If you have installed Simon to a folder other than the default folder, your database will have to relink the data storage database first. This will take a minute or two. If you have moved the data storage databases from the folder in which the main program is located (simon.mdb), you will have to browse and locate the data storage databases and relink. For information about this procedure see Chapter Seven: Linked Table Manager, starting on page 64. It's not particularly difficult or time consuming. After this has been accomplished, you will see a dialog box asking you to set up your store information. We call this area Quick Setup.

### **Simon Icon to the Desktop**

If Simon is becoming an integral part of your business and you want to add the Simon icon to your desktop, follow the directions below for Windows 95 and 98. The process is slightly different in both versions.

**Windows 95 Instructions:** Right click on the Start button. Choose Open from the shortcut list. A window will appear where you should double click on the Programs icon. Double click on the Simon icon. A window should appear showing you all of the repair tools and an icon to activate Simon. Hold down the Ctrl button while dragging the Simon icon onto the Desktop.

**Windows 98 Instructions:** Click on the Start button, navigate to Programs and then to Simon. Hold down the Ctrl button and drag the Simon icon onto the Desktop.

Holding down the Ctrl key guarantees that the icon is copied and not just moved to the Desktop. The reason I have added this information here is due to the fact that the Target line for this runtime program is rather difficult to type and just browsing from the Desktop to create an icon directly to the simon.mdb file will not work. You will have to follow the instructions above, or type an icky Target line. *See*, page 72, if you need to see a sample Target line.

## Quick Setup

The first thing you will see upon entering Simon for the first time is the Quick Setup tool. This tool will guide you through the set up of your store preferences. Simon has an enormous number of options you can set to tailor Simon for your business. It is recommended that you do a thorough job of setting up Simon for the simple reason that none of these options and settings are there just because we wanted to annoy you with question upon question upon question. These options do come into play somewhere along the line and a poorly thought out option may cause inconsistencies with the way you do business. I will try to give you the reasons behind these options in the sections below.

**Store Information.** The first screen that appears during Quick Setup is the Store

**Quick Setup--Store Information**

Enter your store information. This information will personalize the rent due slips and 1583A that this system will create for you. This information is also important for the future of this software as it might be used to personalize other forms that will be added to this system.

Store Information | Form 1583A Info

Owner Name & Title: Gary Lindquist  
 Store Name: Mailbox Limbo  
 Address Line 1: 6644 South 196th Street  
 Address Line 2: Suite T100  
 City: Kent | State/Province: WA | Postal Code: 98032  
 Country: USA  
 Telephone: 425-251-6354 | Facsimile: 425-251-6356  
 E-Mail Address: gary@bnl.com

---

**Quick Setup--Store Information**

Enter your tax rates in the tax rate table. Then, enter the tax rate that applies to any item in the history and forwarding detail descriptions tables.

Show tax rate table

Provide tax rates for items from which category:

History Descriptions  
 Forwarding Detail Descriptions

Code	Tax Name/Descriptions	Tax Rate
WCT	WA Combined Tax	0.11
WAS	WA State Sales Tax	0.08
WSS	WA State Services Tax	0.04
WAT	WA Transportation Tax	0.03
*		0

Place the tax rate code in the box next to the descriptions for which tax will be collected.

Buttons: Cancel, < Back, Next Screen >

**Figure 5:** As of revision 1.54, taxes will be automatically calculated for you. This is true of mailbox rental operation. Mail Forwarding operations will require the depression of the Tax button after itemizing the event.

Information page. See, **Figure 4**. This page will set up options specific to the store such as contact person name and title, store name, address, telephones, e-mail and URL. This information is important as there are a number of letters, forms, etc., that you will create with Simon that will need your store information just to make these items look nice. For instance, a letter should have a letterhead, and it will, if you answer the questions. There is also a tab on this page called Form 1583A Info. The information on this page is here due to the requirements by the U.S. Postal Service that you have a 1583A on file with them. If you fill this out, you can generate this 1583A form from Simon without having to fill in the information by hand. Once you have carefully addressed the text boxes on this page, click on Next Screen to move to the next Quick Setup screen.

### Store Information–Taxes.

The second screen that appears during Quick Setup is the store information taxation page. See, **Figure 5**. If nothing about your mailbox rental business, including the selling of boxes to mail forwarding customers, is taxable, then you should just click on Next Screen to continue on your way. If you are like most of us and are required to collect taxes for some portion of your mailbox rental and mail forwarding business, you should get your tax rates

ready and fill out this form. First, you will want to use the first screen that appears as shown in **Figure 5** to add all applicable tax rates. Of course, my example is overdoing it. You will probably just have one, although some states may have a services tax rate that is applicable to mailbox rental and forwarding fees (which are services. Simon does not, however, limit you on the number of different rates you can add, and, I guess, I wanted to illustrate this fact.

You should add a code to denote a particular tax rate. This code is a maximum of 3 digits. Under Tax Name/Description you should give a name for the tax. Keep it short as this line lands in the history and a long line may get truncated within history. Then add the tax rate as shown in **Figure 5**.

After you have entered the tax rates that are pertinent to your mailbox rental and mail forwarding business, you will want to assign these tax rates to the various history and forwarding detail items that will require taxes to be collected. If you click on the History Descriptions option button, you will see a list of all history items that Simon recognizes. Some do not have money connected to them—for instance, “DUE: Mailbox rent.” is not a history line that will show any funds attached to it. The below listing shows the items that you may or may not want taxes attached:

Mail Forwarding Detail Descriptions	Tax Rate
ADJUSTMENT	[Dropdown]
FUNDS: Additional Amounts	[Dropdown]
FUNDS: Initial Deposit	[Dropdown]
FUNDS: Other	[Dropdown]
FUNDS: Transfer from Key Deposit	[Dropdown]
REFUND: Other	[Dropdown]
REFUND: Return of Excess at Closing	[Dropdown]
SERVICES: E-Mail	WAS [Dropdown]

**Figure 6:** For both History Descriptions and Forwarding Detail Descriptions, you will need to set the tax rates that apply to the description, *i.e.*, RENEWAL: 6 months could be taxable under your jurisdiction.

**History Descriptions**

FUNDS: Box transfer fee.  
 FUNDS: Late Charge.  
 FUNDS: Mailbox Rental Setup fee.  
 FUNDS: Past due charge.  
 OPEN: 1 month.  
 OPEN: 3 months.  
 OPEN: 6 months.  
 OPEN: 12 months.  
 REFUND: Last rents.  
 REFUND: Partial rents.  
 RENEWAL: 1 month.  
 RENEWAL: 3 months.  
 RENEWAL: 6 months.  
 RENEWAL: 12 months.

**Forwarding Detail Descriptions**

SERVICES: E-Mail  
 SERVICES: Facsimile  
 SERVICES: Forwarding Service Charge  
 SERVICES: Mailbox Rental  
 SERVICES: Other  
 SUPPLIES: Box  
 SUPPLIES: Envelope  
 SUPPLIES: Other

Be sure to only add taxes to those history and forwarding items for which taxes will be collected. Adding a bunch of unnecessary entries here will slow Simon down a bit. You see, Simon will test each item that has a noted tax involved when processing a transaction.

**Store Options: Regarding Dates, Late Fees, etc.** This screen will deal with some of the requirements of your system such as the timings as to when to give rent due notices, past due notices and the timing when a box should be closed. For instance, you may want to give rent due notice 30 days prior to the due date, and past due notice on the date the rent is due, and box closure 35 days thereafter. *See, Figure 7.*

**Rent Due: How many days prior to the rent due date would you like to give first notice that rent is due?** Under normal circumstances, you will want to give boxholders 30 days of advanced notice that their box is coming up due. There is no set rule here, so you might give consideration to staying with a number of days less than the shortest time span you will rent a box. If you have a monthly rental fee, you may want to give boxholders only 20 days advanced notice.

That way, even with the one-month rentals, they will not instantly get notice that rent is due. If you allow one-month rentals, you should also print due slips much more often (weekly, for instance). The default

**Figure 7:** Store Options Regarding Dates and Late Fees.

for this option is 30 days.

**Past Due: Past due notices should be distributed how many days after the actual due date?** Legally, a boxholder is past due the day after the due date. If you feel generous, however, you may allow them a few extra days. The default for this option is 0 days. I guess I'm not so generous.

**Past Due: Check this box if you want to charge late fees on past due boxes.** It does help curb those who never seem to be able to get in to pay their mailbox rents on time. We did have this problem at our store, but the problem pretty much went away when we instituted late fees. The default for this option is Yes. By the way, when you are processing a payment for a boxholder, the Simon Helper tool that is used for making payments, will ask you if you want to charge your customary late fee on someone that is past due. Just because you set it here that you want to do this, doesn't mean it is written in stone and everyone who is late will get charged. You may want to forgive this charge for someone who has always been a great customer.

**Past Due: Late Fee on Past-Due Boxes.** If you set the above to charge a late fee, you should enter a late fee here. We found that \$5.00 was adequate to curb the tardiness problem without irritating the procrastinating boxholder too much. The default for this option is \$5.00. Like mentioned above, when processing a payment on a late box, you will be given a choice to charge this fee or not.

**Past Due: How many days past the due date should a box be closed due to non-payment?** We use to give 30 days for boxholders to get payment in to us after the due date. We have upped this to 35 days, however. Usually, but not always, a boxholder will not be coming back ever again if they wait this long. And, it does behoove you to get that box rented again as soon as possible. The reason we changed this to 35 days is because it is more of a hassle to reopen a box than waiting the extra days. The default for this option is 35 days.

**Hold: How many days will you hold a box open for a customer?** A not-so-rare occurrence at our store. Someone will call asking if we have boxes available. They say they will come down to get it within a day or two. We get their name, telephone number and any other information we can get from them. We tell them that we will hold the box for them for three days and then it will be opened up again for rental if they do not come in to claim the box. It's not exactly like locking someone in to getting the box, but I think that customers will be more likely to come in if they know you are holding a box open just for them. The default for this option is 3 days.

**Transfers: Will you be charging your boxholders for transferring from one box to another?** Overkill? I don't know, it could happen where you have a boxholder that wants to play musical chairs with his or her box. If you charge a fee, this will curb this fidgety person. The default for this option is Yes.

**Transfers: Transfer Fee?** If you do want a transfer fee on the books, you will need a fee to charge. You can, of course, override the fee at your convenience. The default for this option is \$5.00.

**Transfers: Will you refund unused amounts on transfers from a larger box to a smaller box?** Simple enough. If you will do refunds in this event, click in the check box to answer yes. The default for this option is No.

**Invoicing: Invoice Starting Number.** When invoices are generated, at what number would you like to start? Do not make the two invoicing numbers (the one below and this one) too close together. It might get a bit confusing in the future when they start running together. The default for this option is 10000.

**Mail Forwarding Invoicing: Invoice Starting Number.** When invoices are generated for mail forwarding events, what number would you like to start at? Do not make the two invoicing numbers (the one above and this one) too close together. It might get a bit confusing in the future when they start running together. The default for this option is 500000.

**Store Options: Regarding Addressing & Labels.** This screen will deal with addressing and labels issues. The first item deals with the address of your local Post Office. This is the address that will be placed on the 1583A form, so don't ignore it. The next area deals with the address you will use for your mailbox rental customers at your store. The addressing should not include a suite number, even if it is your own. This may cause some overzealous postal clerk to reinterpret the DMM rulings.

If you will be using a two line address for the boxholders, use lines 2 and 3. The buttons above the addressing fields will set the box number to the two locations that are legal and using the two designators that the Post Office allows. As of revision 1.55, there is a No Show designation for those who have mail delivered to their own post office box for distribution to their customers. In this scenario, the box number will not show at on labels, or any other document—it is only their to help find the person when you distribute mail. See, **Figure 8**.

The last item on the page wants a dollar figure for label sheets that you can produce for your boxholders. This is a fair revenue maker and also helps the boxholder notify people of their new address, and are just plain handy. You can market this service for a fee, though you should give the first label sheet to them for free. Just a suggestion.

These complimentary mailing label sheets are produced using the Avery label (size 5160), or an equivalent. After you complete the entire gamut of forms for this Quick Setup, you

**Quick Setup--Store Options: Regarding Addressing & Labels**

What is the address of your local post office?

Street Address: 552 Water Lily Road  
 City: Kent State: WA Postal Code: 98032

The address your boxholders use for their box can be set up several different ways. Please choose your way of doing this below. Remember, the box number line will be placed after Line 2, if you are using it this way, so leave Line 1 blank if your addressing does not require three lines.

**PMB 1234**

Line 1: \_\_\_\_\_ (optional, use 2 and 3 first)  
 Line 2: 6644 S 196th Street T100  
 Line 3: Kent, WA 98032

After the complimentary label sheet you may want to charge for labels-- your customers will ask about them. What price would you like for these label sheets? \$3.00

**Figure 8:** Store Options Regarding Addressing and Labels. Note that you can change the placement of the box number from on top of the address to the side, and change the "PMB" designation with a "#" sign simply by clicking on a few buttons.

should try running a set of labels on plain paper to make sure that the addressing you have set up on this page is correct. For more information about these labels, go to the section entitled "Mailing Labels", starting on page 41. The default value for mailing label sheets is \$2.00 per sheet.

**Box Rental Prices.** The next screen in the Quick Setup group will set your mailbox rental prices for each size and duration that you might offer your customers. Any size or duration you do not offer should be left at \$0.00. You will more than likely rent small, medium and large boxes and a forwarding service that is not based on having a boxholder visiting your store, and a package drop option that applies to non-postal mail and usually packages delivered and picked up at your store. You will be able to set 1-month, 3-month, 6-month and 12-month durations. These prices must be filled out so that Simon can put these default values into the boxholder tables when renting a new box. Of course, starting at revision 1.53, you will be able to make adjustments on the actual boxholder tables so that you can set up special circumstances for specific boxholders.

### Box Type & Key Deposits.

Up until revision 1.52, you only had a choice of setting up a key deposit amount on this page. Now, you will also be able to set up your combination lock information, if you rent boxes that have combination locks.

This system will allow you to set up a deposit amount charged per key that a boxholder requests, and also includes information on combination locks. See, **Figure 9**.

**Figure 9:** Combination and Key Information.

**Box Access is attained by what means?** Simple enough. How will the boxholder get into the box? You have three choices: key entry, combination lock entry or both keys and combinations. It is fairly uncommon, but you can still buy the combination lock mailboxes, so we have added this type into Simon, starting at revision 1.52. If you have combination locks in all of your boxes, or if you have combination locks in some, you should answer the questions that pertain to your particular situation.

**Total number of turns to open box.** You have three choices here: two, three or four. Normally, it takes three turns to open a box. For instance, go right to a certain number, head left to a certain number and then head right again to a certain number. This option is only available if you have answered that you have all or some combination locks.

**Combination start and end numbers.** If you look on the dial of the combination lock, what is the lowest number on the dial, and what number is the highest number on the

dial. Why do we bother with this? Well, there is a random number generator that you can use to set a combination. Saves some time and soul searching. This option is only available if you have answered that you have all or some combination locks.

**Combination lock instructions.** You can enter, briefly, instructions on how the boxholder should open his or her box. These instructions will appear on the invoice when a boxholder opens a new box. This option is only available if you have answered that you have all or some combination locks.

**The first turn of the combination.** It is either right or left–clockwise or counter-clockwise. This option is only available if you have answered that you have all or some combination locks. The first constructive turn of the dial will normally be to the right, but, I guess, I had to have both directions if I am wrong on this.

**Since you have chosen Both, what method represents the majority?** This option is only available if you have answered that you have both key and combination locks. By answering this question, you will be given the majority as the default value on new boxes added to the system.

**Please enter the deposit amount you will charge for each key a boxholder is requesting.** If a boxholder wants two keys, he or she should have to pay a deposit for both. Enter the dollar amount deposit you would like to charge for each key given out. Depending on the number of keys given to a boxholder, the fees will be based on this and will automatically be added when you open a new box, assigned extra keys to a boxholder, or refund keys.

**Mail Forwarding.** You will be given many options for mail forwarding. Most of the options are default values that will be used when creating a new mail forwarding client. These defaults can be changed when you create individual requirements for each mail forwarding customer. You should set up the values you would like to show up in the window when you first initiate mail forwarding for a customer. You can then adjust these values as you determine the needs

Figure 10: Mail Forwarding Options. Whoa! Three pages of options!

of the customer. Most of these options are self-explanatory, so I won't discuss each one individually. There is one item, however, on Mail Forwarding Page 2, the first item. This deals with the number of days after a boxholder closes a box, when the mail will be forwarded. The Post Office says 6 months, so it is default valued at 183 days. When you do a one-time forwarding setup using the close tool from the Simon Helper, the boxholder will be set

up as a closed box with one-time forwarding to happen down the road the number of days you enter here. If you leave it set for 183 days, six months down the road, the box will be due for mail forwarding, and it is time to close out the box formally from the system. By the way, the type of forwarding operation will create an entry on the Postal Quarterly Report as if the boxholder was closed on the date the box was closed with one-time forwarding. *See, Figure 10.*

**Form 1583 ID Descriptions.** The typical types of ID you take at your store when filling out a Form 1583 should be placed here. It would be a good idea to change the driver's license item to identify your state, simply by adding the two-digit state signifier in front of "Driver's License." If you are a store located close to a state border, you may want to add a driver's license item for the bordering state as well, or for any state that you get new boxholders from regularly. You should add items to this listing, if you take certain types of ID that is not on the list. The Post Office has a list of requirements in this regard, you may want to consult their list so that you stay within their guidelines.

**Simon Says Priorities.** When you get into the program there is a wonderful wizarding system that will lead you through almost any function that you might want to do with Simon—from making a rental payment to creating an additional key for a boxholder. On this form, *see Figure 12*, there is a box at the top where you should enter the Group Level name. By changing this name, you will change the listing at the bottom left. The reason we have created all of these groups is that there are too many projects to list in one window, thus making it far too difficult to find anything. The dialog you are presented with in *Figure 12*, allows you to change the order in which these projects appear in the Simon Helper window that you will be using in your everyday processing of mailbox rental and mail forwarding clients. You can also uncheck the check boxes along the right edge to shut any of the projects off if they are not relevant to your business. Make sure that all items listed have a number and that there are no

**Figure 12:** Simon Says Priorities. Note that there is a check in every check

Entry	Bank Number	Starting Number	Ending Number	Size	
		0	101	160	S
		2	300	332	M
		3	333	364	M
		4	400	424	L
			0	0	S

**Figure 11:** Initial Box Setup Form. Note that Bank Number 3 is set up with combination locks.

duplicates (under any given group) and that any projects you will not need have the check mark removed from the check box. By the way, there are duplicate numbers when you first enter this screen because it is showing you all listings for all of the groups. There should be no duplications once you make a selection in the Group Level box as it is showing you only those project descriptions for that specific Group Level.

## Box Number Builders

The Box Number Builder tool is used to set up your individual mailboxes into the system. If you had to do each box individually, this process would take quite some time. We did not want to put you through this so we have created two Box Number Builders for your use. The one you will use first will be for your initial setup of boxes at your store. *See, Figure 11.* The second tool will be used to add new banks of boxes to your present system. This will come in handy when you expand your business in the future by adding 500 new boxes!

The Box Number Builder has five items that you should use in creating your system: Entry (either key or combination locks), Bank Number, Starting Number, Ending Number and Size. The Entry item is used to denote whether the boxholder is using a key to enter the box or a combination lock. Just click on the correct button to make this denotation. The Bank Number is used as a way of identifying the banks in your system of boxes. This number is usually arbitrary, but you may have a system for making the bank number notation. Small boxes usually have 30 boxes per bank. If your first bank of boxes are small boxes, you will name the first bank as 1 or A with the starting number something like 101, the ending number as 130, and the size being S. Be sure that all banks are set up with boxes that are consecutively numbered and all the same size. After you have set all of your boxes into the text boxes, you should click on the Create Box Number Database button to create your mailboxes. All boxes start out as being vacant—and this is why you should use the other Box Number Builder for adding new boxes to a preexisting system. You will run into this other Box Number Builder when you need it, it is on the Simon Helper form. If you use the other builder, or if you just want to see it, you will notice that a dialog box will appear asking if you are create a new system or adding to your system. When the time comes, this tool will come in real handy. It does work almost identically to the system explained above, except it leave occupied boxes as they are, the other builder will change all boxes back to vacant (which is why we have two separate tools).

Once you have set up your boxes, you will be asked if you want to set up your boxholders. You will be given two ways of handling this. The quick tool (page 45) and the complete history tool (which is the same as the one for adding a new boxholder from the Simon Helper, page 27). These tools will be discussed elsewhere in this manual so I will not go into detail here.

## Quitting Simon

To quit Simon, select Exit from the File menu, or press the X in the upper right corner of your Simon window. If you are in the middle of a Simon Helper task, however, you should Cancel that task before exiting Simon. Otherwise, the data you were in the process of creating will be stuck in limbo and may cause problems when you try to do another task upon entering Simon again.

## **Online Help**

The aqua question mark on the button bar will lead you to the Simon online help screens. Many of the subjects that are discussed here will be discussed online as well. Subjects will be linked to the main help index by button which will allow you to go backward and forward through the help screens.

## **QuickTips**

After entering the system for the first time, all subsequent visits will start with a Quick Tip that will give you some small tip on using the system. These tips can be turned off and reinstated at your pleasure. You will also be able to delete tips that you don't want and add your own. What a novel idea!

## **Technical Support**

Technical support for this product is free to registered owners of the software for the first year. Registration is handled at the time of purchase and can be facilitated through the mail, from our Web site at <http://www.bnl.com/normalforms>, or by giving us a call. To get technical support, you can either write e-mail to [staff@bnl.com](mailto:staff@bnl.com), or by visiting the Web site and using our handy form to outline your problem, or you can call us at 425-251-6354. At the end of the first year (based on the anniversary date of purchase of Simon), you will be billed for an additional year of technical support. Of course, this is optional, but it does behoove you to do this because without technical support available to you, you will not be able to access the patches area, or call us without being charged for the privilege.



## Chapter Two: The Notorious Simon Helper

The Simon Helper can be opened by clicking on the first icon from the left side of the main Simon window. It looks kinda like Mr. Potatohead with a great big grin. Appropriate considering the fact that he indeed does look like Mr. Potatohead. *See, Figure 13.* The Simon Helper screen will also appear each time you open Simon, since it will be the starting place for most operations within this fine program.

When we first developed Simon, the Simon Helper was not even a glimmer in my baby blue eyes. But, even though it may not appear to be from someone standing on the outside of this business, the mailbox rental and mail forwarding business is a bit too complicated for an interface that will force the user to manually keep everything in order. The Simon Helper was added to give the interface a much more user-friendly flavor and to hide the complex nature of the operations from the user. Of course, contingencies were made with Simon to allow for complete control of the data. So, don't fear that we have hidden anything crucial from you—the Simon system is very open. *See, Diagnostic Area starting on page 78* for details on how to make manual adjustments.

The Simon Helper was added so that each operation within Simon can be done with walk-through screens. Even a novice can work through over 50 different operations without the least amount of trouble. Simon will ask all of the right questions to get you through even a fairly complicated operation such as renting a mailbox to a new customer, or doing a mail forwarding operation. So, let's look at the Simon Helper. By the way, I'm not going to spend an inordinate amount of time explaining each step of an operation here. After you try an operation or two with the Simon Helper you will see for yourself how wonderfully intuitive it is—it hardly needs explanation. Actually, I would like to run through one set of tools so that you can get a feel for Simon operations, and this tool will be the one for Adding a New Boxholder.



Figure 13: Simon Helper Main Form.

### Use of the Simon Helper Main Form

The main Simon Helper form is used to direct you to the operation you desire. All you need to do is choose a type of operation at the top, *i.e.*, Mailbox Rental, Mail Forwarding, Reporting, Maintenance, and Help. Then you will notice that the list of operations below changes to note operations that fit the type of operation you have chosen. Choose an operation from the list in the box below the type list and then click on Next Screen to proceed with the chosen operation, or you can double click on the item in the Operation list.

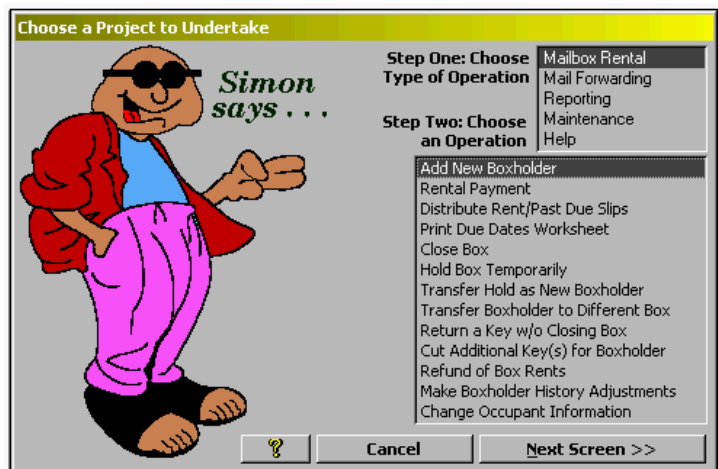
You can also choose the yellow question mark to view a help screen that will explain the operation that is selected in the operations window, and from there you can move forward with the operation. *See, Figure 13.*

As an aside I did want to say that the operations discussed below may not be an all inclusive list of operations. When we wrote the code for Simon, we wrote it so that we can write in new code and new operations whenever we get a suggestion that we feel will make Simon just that much better. We have added a dozen or more operations since we first introduced Simon and, I am fairly sure, there will be more in the future. This manual was written during Revision 1.55, so it is up to date as of May 18, 2000!

### Simon Helper Type: Mailbox Rental

By choosing this Type of Operation in the box at the top of the Simon Helper form, you will see a list of all operations that you might do pertaining to mailbox rental in the second list box on the form (there are only two list boxes on the form). This list does not include reporting types, except the distribute rent/past due slips operation, and the print due dates worksheet, which are both so closely related to standard mailbox rental operations that I had to add them here. The following is a listing of the Mailbox Rental operations that you might choose to do at your store.

**Mailbox Rental Operation: Add New Boxholder.** Simply put, this tool will help you run through the entire operation of setting up a new mailbox rental. You will be asked for names, addresses and telephone numbers of both boxholder and occupants, identification for all parties, the box number, key numbers, spouse, other names, business information--everything. Then it will offer to print 1583s, a mailbox label, mailing labels for the boxholder (with some very clever marketing help, I might add) and an invoice. This is a quick and easy way to set up a new box. This operation will also help set up a "new" boxholder to receive mail forwarding services, simply by setting the status as "Open-With Forwarding," rather than "Open-No Forwarding." The following images and steps will guide you through the entire operation.



**Figure 14:** Add New Boxholder is selected from the Simon Helper screen. Click on Next Screen to continue through the walk-through screens.

**Step 1: Transaction Date & Keys.** I guess the name is not quite as complete as it should be for as many things as will happen on this screen. The default date that will be placed at the top of this window is today's date. This makes it easier to deal with because most of your mailbox renting will happen the day that the customer comes into the store. You can, however, change this date to a different date and the system will understand that you are catching up, or adding people into the system that are already set up with a box at your store.

The next item to fill in is the box number. Choose a box from the drop-down list. Only currently vacant boxes will appear on this list and the listing in the drop-down list will show you how many keys are available for any particular box, or (if applicable) whether it is a combination lock box. It is nice that it will tell you how many keys are available in the back room for any particular box so if the customer wants two keys, you can find a box in the size he or she wants with that number of keys (saves you from having to cut unnecessary keys). Once you have chosen the box, the size, key information, combination information and the quoted rent fees will appear automatically. Any of this information that appears automatically can be changed. For instance, if you do not like the combination that appears here, click on the bar on the right side of the combination or, of course, you can type in your own. If you will be charging a different price than that shown in the quoted rent fees area, change it. As in this case, you can see that one month rental is not available. You can add the fees for one month rental here and it will become available for this customer only. If you do adjust the quoted rent fees and then decide to go back to the standard fees for this size box, click on the bar directly below the quoted fees boxes. Once you have finished here you should click on Next Screen to move forward in the process. By the way, moving back from any of these screens will not destroy information that is entered in the process; however, choosing Cancel will.

**Add a New Boxholder--Step 1: Transaction Date & Keys**

Date of This Transaction: 1/10/2000

Enter the Box Number, Key Number (if you keep this information), the number of keys given to this new boxholder, or lock combination.

Box Number: 134 Box Size: 5 Right: 36  
Left: 27  
Lock Combination: Right: 29

Quoted Rent Fees	1 Month	3 Months	6 Months	12 Months
	\$0.00	\$20.00	\$35.00	\$65.00

Rent fees quoted as a zero amount denotes an unavailable duration.

Cancel << Back Next Screen >>

Figure 15: Step 1: Transaction Date & Keys.

**Step 2: Customer Address Information.** This screen will be used to enter as much data about the customer and where he or she lives and how to communicate with this customer. Do note that there are very few labels on the boxes where you put in the information. There was just too much clutter on this page to allow for labels. If you need a reminder of what goes in which box, look at the bar along the bottom edge of the Simon main window. Simon will tell you what goes in which box.

**Add a New Boxholder--Step 2: Customer Address Information**

Enter the address information of the person applying for a mailbox. If you are unsure what information goes in each box, refer to the status bar at the bottom, left of this program window.

Fred Flintstone Date Opened: 1/10/2000

Bedrock Sand & Gravel Inc.  
5831 Pyroclast Avenue  
Suite R87  
Bedrock WY 58433 USA

Telephone: 555-555-5585 Fax Number: 555-555-5586

E Mail: ff@bsg.com

Note: Nice guy, though a bit course in his mannerisms. Don't let this turkey into the store without at least a pair of sandals as he seems to be shoeless.

Cancel << Back Next Screen >>

Figure 16: Step 2: Customer Address Information.

**Step 3: Status and Identification.** There are two options available from the status box: you are either opening the box without forwarding or you are opening the box with forwarding. Mail forwarding has been chosen so that you will see all of the screens available when adding a new boxholder. If I would have chosen the without forwarding option from the combo box list, we would have skipped several steps that were not applicable to non-forwarding boxes. After you have made a status choice, you should put in the two pieces of ID required by the Post Office. Your choices in the drop-down lists above the Description text boxes, will be the choices you listed when doing the quick setup, or under Store Preferences. Here, you see, I have taken Fred's Wyoming driver's license as ID and his Bedrock Sand & Gravel corporate ID. You should make a copy of both of these pieces of ID.

Figure 17: Step 3: Status and Identification.

**Step 4: Spouse Information.** Here you will enter information about the spouse of the boxholder, if the boxholder expects to receive mail for his or her spouse. If you do have a spouse listed as receiving mail in this box, for you to be able to accept this mail, you must get identification for the spouse, just as you would the boxholder. Otherwise, you, as an agent for the boxholder, will not be considered an agent for the spouse for mail receiving purposes. This ID should be copied as well. Notice that there is a tab page for Other Names. You should list any children of these two who might be receiving mail at your store, aliases that the boxholder, spouse, children or company might use. This is not the area where you will list other non-family members who might be receiving mail at your store. Other non-family members will be addressed in another step of this builder tool.

Figure 18: Step 4: Spouse Information.

**Step 5: Business Information.**

If you check the “Doing Business With the Public” check box at the top of this form, the address information as given in Step 2 will automatically be placed as the address of the business. This is not, however, always the case, so you will use this opportunity to edit this. The Other Business Information tab is where you place the other information about the business that you will place of form 1583. By adding it here, the information is automatically placed on Form 1583. If you are familiar with postal regulations in the past, the reference names box was once information the Post Office was interested in. Not anymore. We left this on here in the event you want to keep this type of information for yourself for those times a rather unsavory looking character should want to rent a box.

Figure 19: Step 5: Business Information.

**Step 6: Occupant Information.**

If there should be addition people, not closely related to the Flintstones using the box, you will add them here. Please note that a lot of information is kept on this occupant. Why is this? Because you are required by the Post Office to turn in a Form 1583 on these people, just like with the boxholder. In the case of the spouse, his or her information is a part of the boxholder's 1583. This occupant's 1583 will be in addition to the boxholder 1583 and thus is an entirely separate entity. When you add an occupant, the address information will be the same information as used for the boxholder. You can edit this information if it is different. The same goes for the business information. If you set this person as having a business, Fred's business information is added here. This can be edited as well. Please note that a spouse is not offered on the occupant information page. You should do a separate occupant page for a spouse to a mere occupant to a box. The pencil button will get you to a new occupant page. If you want to delete an occupant, just click on the grey bar along the left edge of the tabbed control (it will turn dark grey) and then hit the delete button on your keyboard. Note that there is a scroll bar along the right side of the

Figure 20: Step 6: Occupant Information.

form—this is for scroll through the occupants in the event you have more than one that you have entered.

### Step 7: Duration & Costs Information.

This is where you note the duration of time for which this boxholder will be renting the mailbox. Notice that there is a blank area right after the Standard Mailbox Rental Rates title. If you were giving one month rental for this box, the area would should this choice here. As it is, there is no one-month rental available. If you wanted to add one-month rental as a choice here for our dear friend Fred (though if he were truly a friend he would rent for a year!), you can go back (by using the Back

buttons) to Step 2 and add fees there for a one-month rental. In this case, however, he is truly a friend and will rent for a year. Just click on the button above 12 Months to choose it. The rental amount will be listed below and a mail forwarding fee, if applicable (and it is in this case).

Figure 21: Step 7: Duration & Costs Information.

### Step 8: Mail Forwarding Information.

This step is ignored when doing a non-forwarding box. By default, Fred's address information is added here. This was done because 90 percent of the time, a person will be having his or her mail forwarded to their home address. Actually, the percentage is probably well over 90 percent. Of course, if the mail is being forwarded elsewhere, you can make these changes here. There is a note box right below the email address. This is where you might want to add details that will help you to do this person's forwarding correctly. For instance, if Fred asked you to throw all junk mail away, rather than sending it along to him, this is where you should make note of this.

Figure 22: Step 8: Mail Forwarding Information.

**Step 9: More Mail Forwarding Information.**

Most of the information on this particular page will be filled out automatically depending on the variables that you have used when doing your initial setup or those that you set using Store Preferences. Anything on this page can be edited by you. Actually, you may want to direct the questions that are listed on the screen to the customer, so that he or she can tell what they would like. You can also

post the credit card information on this form if the customer will be having you charge his or her credit card when fees are due for mail forwarding.

Figure 23: Step 9: More Mail Forwarding Information.

**Step 10: Boxholder History.**

This page will show you a listing of what will be added to your new boxholder's history. Everything that has been done in the past steps has been itemized here. Notice that rent is due in a year's time and forwarding is due in fifteen days, just as you noted on the foregoing pages. There is no initial key deposit, because you did not issue keys to this customer and the date this box was opened and the

Here are entries made to this boxholder's history. Make corrections if necessary.					
Date	Description	Rent Amount	Deposit Amount	Forwarding Income	
1/10/2000	OPEN: 12 months.	\$65.00	\$0.00	\$0.00	
1/10/2000	OPEN: Initial key deposit.	\$0.00	\$0.00	\$0.00	
1/10/2000	FORWARD: Mail forwarding fee.	\$36.00	\$0.00	\$0.00	
1/10/2001	DUE: Mailbox rent.	\$0.00	\$0.00	\$0.00	
1/10/2000	FORWARD: Initial deposit.	\$0.00	\$0.00	\$50.00	
▶ 1/25/2000	DUE: Mail forwarding.	\$0.00	\$0.00	\$0.00	
*		\$0.00	\$0.00	\$0.00	

Figure 24: Step: Boxholder History.

duration of the rents is noted. Also, a line is added for the initial deposit on mail forwarding. This amount will be deducted from when forwarding operations are done in the future. You are allowed to make correction to this page, although, if there are mistakes that can be corrected by revisiting past steps, correction should be made by going back and correcting them. For instance, you could set the mail forwarding due date up a few more weeks, but if you want to make it monthly forwarding instead of twice a month, you should go back and do the correction on Step 9. Alternatively, if the customer just wants to have mail forwarded a couple of weeks later just this one time but still wants forwarding twice a month, make the correction on this history page.

Please note that the forwarding fee is not adjustable nor are the other fees on this form. To make these adjustments you should go back to make the adjustments except on the

mail forwarding fee, which is not adjustable at all unless you go to Store Preferences and temporarily change the fee there.

As an aside, if you are charging taxes for any item on this history page, taxes will show up here.

### Step 11: Recording

**Transaction.** Everything up to this point is being held in stasis until you click on the Finish button at the bottom. In other words, none of the information you have entered to this point is added to Simon until you click on Finish. At this point you will have to make a few decisions as to which reports you would like to print out. All are selected and, if you do not



Figure 25: Step 11: Recording Transaction. That's all there is to this Helper.

want a certain item printed, you should just uncheck the box. You can print out a nice invoice for the customer. This invoice will also show the combination and instructions on how to use the combination, if it is a combination lock. You can create 1583s for the boxholder/spouse and for all occupants that you have entered into Simon. You can create a nice label that you can tape to the back of the box so that the person adding mail to the box can easily see who belongs to what box. And, lastly, you can create mailing labels for the boxholder using the 5160 Avery label sheet. The last item will also add some marketing in hopes of maybe selling a few mailing label sheets to the boxholder. There is a handy mailing label creation tool available from the Simon Helper for creating labels later. That's it. You will not that most all Simon Helper operations will end with the last form containing a button that says Finish on it. After you click this button all information will be made permanent to the system. There will be dialog boxes that may appear asking you to put in certain types of paper during this printing stage. If you have asked for mailing labels, a dialog box will appear asking for your label sheet. Do remember to wait for the printer to stop printing before adding this sheet as the prompts for a certain type of paper may appear well before the printer is ready for that paper. Nothing I could do about this.

Please note that you do have a store option in your Store Preferences area where you can uncheck all reporting on this last page of all Simon Helper screens, rather than having them all checked. Go to Store Preferences, navigate to the General page and uncheck the check box just below the paper color settings.

This is how the Simon Helper walk-through forms work. Most of the walk-through steps run between 1 and 13 steps, and most are toward the shorter end of this spectrum.

**Mailbox Rental Operation: Rental Payment.** This tool is for making a mailbox rental payment for a boxholder. No, this is not the place to add mail forwarding funds for the client. For this, you should use one of the tools under the mail forwarding group. This tool will ask for the boxholder for which you would like to make the payment and the duration of the renewal. At the end of the routines, it will show you the entries that will be made to the boxholder's history, at which time, you can make edits. Fairly simple, really. Invoicing is offered at the end of this operation.

**Mailbox Rental Operation:  
Distribute Rent/Past Due Slips.**

As of revision 1.55, we have tried to give some added flexibility to this great tool for printing rent due and past due slips. One thing we have added is the ability to create a letter, rather than a slip. We have had some request on this since the slips are fairly small (six per page). You will, however, have to make the letter selection at the upper right to create letters each time you use this form. From this form, you will be able to print rent and past due slips together or separately. *See*, Type of Slip(s) You Want? in **Figure 26**. You can then either

(1) automatically print currently due or past due slips or letters (*see*, Current in **Figure 26**. Note: if slips have previously been generated for this boxholder for this due date, they will not be generated again using this option.), (2) reprint slips for past slip distribution dates (*see*, By Date in **Figure 26**. Note: will not reprint slips that have been paid.), or (3) print individual slips for the most current dates a slip was distributed to a specific boxholder (*see*, Individual in **Figure 26**).

A new feature as of revision 1.55 is the ability to reprint all past due slips for boxes that are still due. This will allow you to give your boxholders another chance to get their payments in to you. *See*, the button in the lower right corner with the bell in **Figure 26**. All of these options will ask you to load the appropriate paper for each slip type. I know that most of you prefer to use colored paper for different slips--we use goldenrod for rent due slips and red for past due slips. Also, when creating "Current" slips, an additional slip is created for the back of each boxes telling the person distributing mail not to distribute mail to past due boxholders. Pretty cool, huh? You should probably create Current slips or letters a couple of times a month at regular intervals, probably even more often if you rent boxes by the month. By the way, there are a number of buttons within Simon that are not readily apparent as to their purpose. Just hover your mouse cursor above the button momentarily and a "Tip" will appear that will give information about the buttons purpose.

**Figure 26:** Rent due and past due slips can be printed separately or together, current, by a date when slips were distributed in the past, individually by boxholder, or all slips still unpaid.

**Mailbox Rental Operation: Print Due Dates Worksheet.** If there are times in your store when you just cannot afford the time to enter Simon to make a rental payment, you can make entries on this worksheet and then enter the items later. This worksheet prints out all boxholder due dates from most current to least current. It allows ample room to make notations for rents paid, box closures, and new additions to your stable of boxholders (though it is a good idea to enter the last task into the computer right away so you can take advantage of the automated creation of 1583s, mailbox labels and mailing labels for the new boxholder, etc.).

**Mailbox Rental Operation: Close Box.** When a boxholder closes a box, or if you close a box for nonpayment of box rents, or if they just fail to ever return again, or if you want to set up a forwarding situation for the customer, or close a forwarding situation for a customer, this is where you can start. History is added for the boxholder and then the box is closed, or set up for mail forwarding. There are five different closing operations to choose from.

**Closing Operations: No Key Return.** This closing operation is used when the boxholder never comes back again. Has this ever happened to you?!? If, however, you have a return address for mailing forwarding for a specific boxholder, you will probably want to use the one-time forwarding closing, since the Post Office wants you to forward to a past boxholder at least once at the end of a six-month period. You should also use this type of closing if there will be no forwarding and the boxholder has a combination lock mailbox.

**Closing Operations: Key Return.** You will use this type of closing if you have a boxholder who returns some or all keys, but does not elect to give you a forwarding address. It happens.

**Closing Operations: One-Time Forwarding.** This closing operation is used when you will be sending the boxholder's mail to them after the required six-month period as prescribed by the U.S. Postal Service. The amount of time that Simon will wait to give you notice on this one-time forwarding is set by you in your store preferences. As a default, it is set at 183 days, which is six months.

**Closing Operations: Move to Mail Forwarding Only.** This closing operation is used when the boxholder no longer needs front access to a mailbox and just wants to have his or her mail forwarded. The boxholder could be on contract to work for a business out of town for a temporary term. If this boxholder is no longer in need of a front access mailbox, you may want to move this boxholder to an "F" mail forwarding only box. This will free up the box for another boxholder.

**Closing Operations: Cancel Mail Forwarding Service.** This closing operation is used when you will be canceling a mail forwarding client's services.

**Mailbox Rental Operation: Hold Box Temporarily.** If, perchance, someone should come in wanting a box, but failing to provide the correct identification or the proper funds for the transaction, you can set the box aside for them temporarily. The term you will hold a box open will be set by you in the store preferences area. The time period you will hold a box is set based upon the number of boxes you have available. For instance, if you are full up and can only afford to hold a box open for a day or two, so be it.

**Mailbox Rental Operation: Transfer Hold as New Boxholder.** Of course, when you are holding a box for someone who may, or may not, come back to rent the box, you need a tool not only to close the box (Close Box) if the person does not show, you also need a tool to add the person as a new boxholder. This tool does the latter. The Close Box tool will do the former.

**Mailbox Rental Operation: Transfer Boxholder to Different Box.** It happens but, hopefully, not very often. There are times when a boxholder wants to move to a different box. It may be because they want a larger box, or smaller box, or they may just not want to bend over anymore. This tool will transfer a boxholder to a different box and will make adjustments to their bill if they move from a box of different sizes. You can set whether or not you want to give refunds for movement to a smaller box.

**Mailbox Rental Operation: Return a Key w/o Closing Box.** If you should have a boxholder who has several keys that are no longer needed, he or she should be able to return them for a refund of deposits. This should do the trick.

**Mailbox Rental Operation: Cut Additional Key(s) for Boxholder.** A boxholder comes in and says that he or she wants another key for Billy. This tool will add the key to the system and will prompt for an additional key deposit.

**Mailbox Rental Operation: Refund of Box Rents.** Heaven forbid that you should ever have to refund box rents, but it could happen. For instance, if some boxholder has a legitimate gripe about your service and you feel that they might be justified, it may behoove you to refund and close their box. This tool will refund and close them down. You can also use this tool to refund box rents, partial or whole, but leave this boxholder open. There may be times when you feel that you might want to give someone the rest of their rents free due to some legitimate reason, but the boxholder was not angry enough to want to leave.

**Mailbox Rental Operation: Make Boxholder History Adjustments.** Sometimes, your history may have an entry or two that are inappropriate. This will allow you to delete or edit entries, or even add new entries. Of course, there is no automation here, so be careful how you use this. Please note that there is a small box along the left edge of each history entry. If you click on this box it will turn dark grey. If you hit the delete key at this point that entry will be deleted. If this history adjustment Simon Helper is not adequate for the problem you are trying to solve, you can use the Diagnostics Area as outlined starting on page 78.

**Mailbox Rental Operation: Change Occupant Information.** This operation will allow you to add, edit or delete occupant's from any boxholder's box.

### **Simon Helper Type: Mail Forwarding**

By choosing this type of operation in the box at the top of the Simon Helper form, you will see a list of all operations that you might do pertaining to mail forwarding. The below is a listing of the operations that are available.

**Mail Forwarding Operation: Forward Mail.** This operation will allow you to do any number of chargeable things for your mail forwarding client. You can send their mail and itemize the charges, send faxes, emails, make funds adjustments, *etc.*, though, if the operation is not related to the sending of their mail, you may want to choose the Other Service operation as outlined on page 37.

**Mail Forwarding Operation: Open Mail Forwarding Client.** This operation works a lot like the Add New Boxholder helper. There are a number of issues that must be addressed when setting up a forwarding client, including where to send the mail, how often, the minimum fees, and typical funds replenishment amount, amongst other things. This tool will get all of this set for you, and will open a box for this client.

**Mail Forwarding Operation: Cancel Mail Forwarding Client.** All good things must eventually come to an end. This tool will close down the mail forwarding client and close the box and make it available for rental again.

**Mail Forwarding Operation: Change Boxholder to Forwarding Client.** This tool will give you an opportunity to move a boxholder into a non-front access box, return keys, *etc.*

**Mail Forwarding Operation: Forwarding Mailing Labels.** This tool will create a sheet of mailing labels with the address for sending mail to a forwarding client. This tool uses the Avery 5160 or equivalent label.

**Mail Forwarding Operation: Rent Due Letter.** This tool will create a letter asking for payment of mailbox rent to a forwarding client. You see, most forwarding clients are not around and thus a letter is more appropriate than slipping a rent due slip into their mailbox.

**Mail Forwarding Operation: Rent Past Due Letter.** This tool will create a letter asking for payment of mailbox rent to a forwarding client after they have allowed their rents to become past due. It is a bit more direct.

**Mail Forwarding Operation: Other Service.** This operation will allow you to do any number of chargeable things for your mail forwarding client. You can itemize the charges, send faxes, emails, make funds adjustments, *etc.*

**Mail Forwarding Operation: Adjust Forwarding Orders.** This operation will allow you to adjust the forwarding information for a client—forwarding address, minimum funds, typical replenishments, credit card information, *etc.*

### **Simon Helper Type: Reporting**

By choosing this type of operation in the box at the top of the Simon Helper form, you will see a list of all reporting operations.

**Reporting Operation: Distribute Rent/Past Due Slips.** Choose this operation from the list and all rent due and rent past due slips will either be (1) automatically printed for you, (2) you will be able to print slips for past dates that you have previously distributed slips, (3) you will be able to print individual slips for the most current dates a slip was distributed, or (4) you can click on the button with the bell to reprint all slips or letters for those boxholders who have received their compliment of rent due and past due slips, but still have not paid. Of course, you will have to make a few choices. It will ask you to load the appropriate paper for each slip type. I know that most of you prefer to use colored paper for different slips--we use goldenrod for rent due slips and red for past due slips. Also, the Current tool will create slips for the back of your boxes telling the person distributing mail not to distribute mail to past due boxholders. Pretty cool, huh? You should probably do this a couple of times a month at regular intervals, probably even more often if you rent boxes by the month.

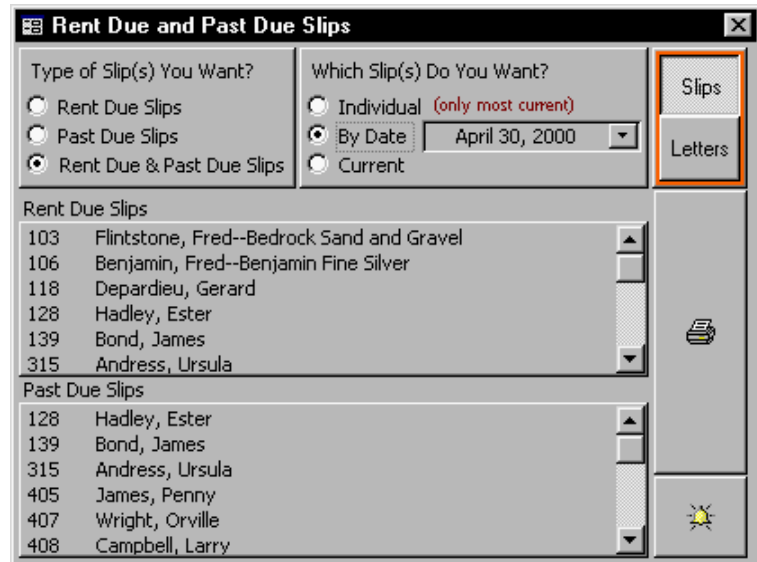


Figure 27: Rent Due and Past Due Slip Generator

Besides setting up a new boxholder, one of the most important operations you will do in regards to mailbox rental will be the issuance of rent due and rent past due slips or letters. This operation has been made fairly easy for you.

You can review the notices that are currently in need of issuance by reviewing the form that appears when you choose this item. This listing will show you which boxes are due or past due. There is also a button on the button bar to handle this process for you. See, **Figure 27**.

If you select the Print Box Due Slips item from the menu, or click on the appropriate button on the button bar, you will be shown a screen as illustrated above. As shown, there are quite a number with rents due, and another group listed as past due. Select the past due option and click the printer button to print just the past due slips. Before the printing is done, Simon will ask you to place the appropriate paper in the printer. The reason for this is that a lot of store owners want their slips on different colored paper. For instance, yellow for rent due and red for past due (hence, places more urgency on the past due notice). After the rent due slips are printed on the color you select for these slips, it will ask you to place the appropriate paper in the printer for the past due slips. These slips are printed six per page and should be cut out and slipped into the boxes. Note in **Figure 27**, that you do have an option in the upper right corner to print letters instead of slips. Letters are full page and does provide better visibility to your notices. After the past due slips are printed, tags will be created for insertion in the back of the box to remind you and your staff that mail for this box should be held awaiting payment.

When this procedure is complete, these boxes will be marked in the database as having been notified of their past due status. This helps when you have that boxholder come back saying they did not receive notice. Yeah, right!

The timings of when slips will be distributed to your boxholders is set in your Store Preferences area and should have been set up when you installed the program. *See*, Store options starting on page 16. Everyone has different ideas about when to give notices, so this is entirely up to you. Also, you can set up the color of paper to use within Store Preferences as well. It is much nicer to get a message saying “put the goldenrod paper in the printer”, rather than “put in the appropriate paper,” don't you think.

**This operation is entirely automatic and is only as accurate as the information in your database. We have made every attempt to automate most of the operations in this program, but some care must be taken on your part to assure that the information added to the database is correct. For instance a faulty date in the mailbox history on a particular client can mean that they will not receive notice that their box is due correctly, or a boxholder who is given a key but no entry was made to the Number of Keys field, no deposit return is addressed upon closing the box. Make sure that you understand the operations herein and audit your data for accuracy whenever possible.**

**Reporting Operation: Print Due Dates Worksheet.** If there are times in your store when you just cannot afford the time to enter Simon to make a simple rental payment, you can make entries on this worksheet and then enter the items later. This worksheet prints out all boxholder due dates from most current to least current. It allows ample room to make notations for rents paid, box closures, and new additions to your stable of boxholders (though it is a good idea to enter the last task into the computer right away so you can take advantage of the automated creation of 1583s, mailbox labels and mailing labels for the new boxholder, etc.).

This great worksheet should be printed out every now and then for those times when you just cannot get to the computer to deal with boxholders who come in to pay their rents. You can easily make entries on this worksheet to be added to Simon later.

The Worksheet has a lot of information printed on it to help validate a transaction. The box number, boxholder name and status of the box, the number of keys issued to this boxholder, the date rent is due and the fees charged by your store for the various durations for which you rent boxes. There are open boxes for each boxholder that has an upcoming due date: the date rent was paid, the new due date and, if the box is being closed, the date of closure and whether or not key(s) were returned.

The last column of the Worksheet is also a box that has as a heading an asterisk. This box is only used to sign off on the item in that row when the information for that item is transferred to Simon. A date or a check mark is sufficient here.

At the end of the Worksheet there are ten blank rows to be used to add entries that do not fit under any of the above listings, *i.e.*, new boxholders.

This Worksheet can be printed any time you want and it will be updated based on the information in your database.

**Reporting Operation: Sales.** Print sales reports for any set of dates you enter into Simon. You can also print reports for individual customers and individual boxes, and reprint invoices that have been printed in the past. See, **Figure 28**.

**Figure 28:** Sales Report.

**Reporting Operation: Customer Information.** Choose this item from the list and a menu will appear that will help you find information about your past and present customers.

**Reporting Operation: Due Dates.** By choosing this, a menu will appear that will give you some choices of how you would like your due dates reported.

**Reporting Operation: Closings.** If you choose this item, a list of boxes that are past the date you have set for when you will close boxes. At this screen, you will be able to print the list or even remove items from the list if they have paid but for some unknown reason still appear on the list (it is inevitable that someday someone will not get into the database as paid). On

Box Number	Box Size	Boxholder's Name	Date Rent Was Due	Past Due Notice Given	Rent Paid
183	S	Raymond Kelleroy	11/1/1999	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Figure 29:** Those Boxes to be Closed.

thing: just because someone is past due does not automatically mean they will show up on this list. If the boxholder has not received a past due slip yet, they will not show up on this list. Why is this? Well, if you try to close a box that has not been formally warned of their tardiness, they will assuredly come back and bite your head off. If you do keep up with the notices as you should, then they will appear here as they should and you will have documentation of the dates that rent due and past due slips were distributed.

If you know for a fact that Raymond Kelleroy, *see* **Figure 29**, has paid his box, then you can click on the “Oh yes it was paid!” button to add a payment for this fella. If you know that he hasn't paid, click on the red “X” button to close the box without key return.

**Reporting Operation: Postal Quarterly Report.** Every quarter, you are required by the Post Office to supply them with a report of boxholders, occupants and recently closed boxholders. This report can be generated anytime you wish, but is required on January 15th, April

15th, July 15th and October 15th of each year. If you go to the reminders page sometime in the vicinity of these dates (before), you will see a reminder that this date is approaching and that the report is due.

**Reporting Operation: Individual 1583s.** From time to time you may be required to print a new 1583 for a person. A dialog box will appear where you will be able to print a new 1583 for both closed and current boxholders and occupants.

**Reporting Operation: All 1583s and 1583A.** This tool will allow you to go in and print all 1583s for all current boxholders and occupants. You can also eliminate information from certain fields from all of the 1583s that will be printed, allowing you to get fresh information for these fields. From this form you will also be able to print blank or filled out 1583As, or a blank 1583.

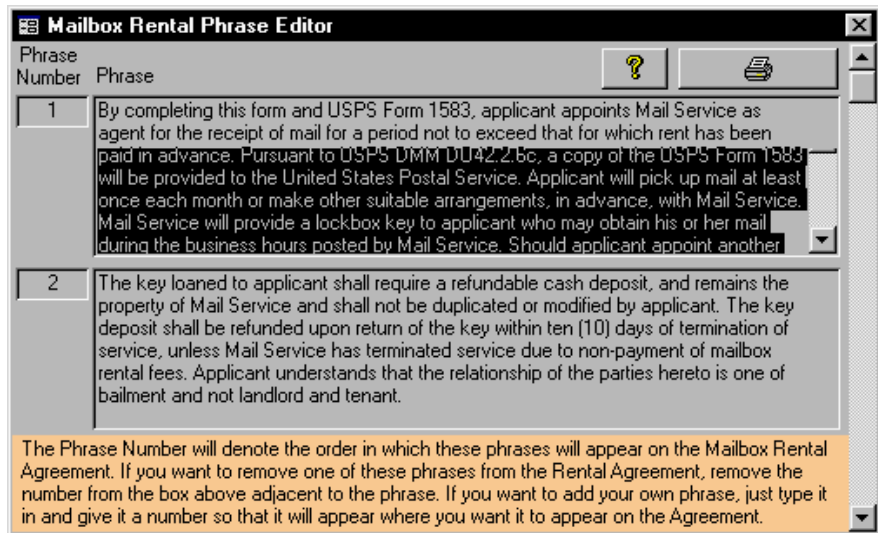
**Reporting Operation: Mailing Labels.** We provide our boxholders with a sheet of mailing labels when they first open a mailbox at our store. If they want additional sheets, we charge \$2.00 per sheet of 30 labels. The form that follows will allow you to create mailing labels for the boxholder, spouse or occupants, with or with company names, if you decide that you too can provide labels. This tool uses the equivalent of Avery 5160 labels. *See, Figure 30.*

Figure 30: Mailing Labels Form.

When you open a new boxholder, a marketing sheet will be printed, if you choose to do one, that will help you sell additional sheets to your boxholders.

**Reporting Operation: Rear Box Identification Tags.** This tool will create a label that you can tape onto the rear edge of your mailbox so that it is easier to identify the boxholder, and guests, when depositing mail into the boxes. You can print all currently open boxes, or you can print labels individually.

**Reporting Operation: Come to the Front Counter Slips.** This operation will simply create slips (six per page) that instruct your customer to come to the front counter. The slip is placed within their box and can be used to notify the customer that they have a package too large to be placed within their box or to let them know that they owe the store additional postage, fees, whatever.



**Figure 31:** The Mailbox Rental Agreement Phrase Editor can be used to tailor your own Agreement with your boxholders.

**Reporting Operation: Telephone Number List.** By choosing this item, you will be sent to a small form where you can print a list of all of your current boxholders with their box numbers, telephone and fax numbers and email addresses. This report can be printed alphabetically or by box number. It actually does more than just create a list of phone numbers, huh!?

**Reporting Operation: Mailbox Rental Agreement.** This tool is for creating a mailbox rental agreement. We have added a number of sections that can be kept, deleted or edited. You will be able to build your own sections for the rental agreement, if you have specific language that you like to use. *See, Figure 31.*

**Reporting Operation: Boxholder Combination List.** This Simon Helper item will create a listing of all of your boxholders who have combination locks, showing the box number, name of the boxholder and the combination used to access the contents of the box.

**Reporting Operation: Boxholder/Occupant List.** This Simon Helper item was added as of revision 1.54. There were several requests for a list of boxholders and occupants in alphabetical order so that this list could be referred to while distributing mail. The point is that not all boxholders and occupants are known to the store personnel. Maybe the boxholder or occupant only receives mail rarely and thus it may be difficult to locate the correct box to distribute to. This listing should help.

**Reporting Operation: Vacant Boxes.** This Simon Helper item was added as of revision 1.55. There were several requests for a list of vacant boxes.

### Simon Helper Type: Maintenance

By choosing this type of operation in the box at the top of the Simon Helper form, you will see a list of all maintenance operations.

**Maintenance Operation: Archive Closed Boxes.** The process of moving folks to archive is automatic, but you may want to run it manually by using this tool if you know you closed someone and they seem to appear nowhere. This, however, is highly unlikely.

**Maintenance Operation: Quick Setup.** When you first use Simon, a bunch of setup routines are run to help you get everything situated within the program. This tool will run through the setup routines again for you. If you would prefer to set these store options on a single screen, use the Store Preference tool instead of Quick Setup.

**Maintenance Operation: Mailbox Builder–Initial Setup.** This is an automated tool that will help you set up your mailboxes for the first time. The process of setting up the numbers would be difficult if you had to do this manually--this is quite easy with this tool. By the way, this is one tool that you will probably want to remove from the Simon Helper some-time after you have set up your boxes. By doing this, it will be nearly impossible to make the mistake of using this tool when adding new banks to your system. To remove this tool from the Simon Helper, go to Store Preferences, click on the Simon Priorities tab and uncheck the operation under Maintenance that mimics this item.

**Maintenance Operation: Mailbox Builder–Add Banks.** This is an automated tool that will help you set up additional mailboxes in the event you have more to add after your first installation. Do not use the initial setup tool (the other one) when adding new boxes. This will go through and reset all of the boxes to vacant. This particular tool will not do this to you.

**Maintenance Operation: Rotate Tumblers.** If (1) a boxholder leaves without giving you notice, if (2) the boxholder does not returning all of the keys, or if (3) the boxholder is vacating a box with a combination lock, you will need to rotate the tumblers in the box to prevent a past boxholder from breaking into the new boxholder's mail. This tool will help you keep the box numbers, key numbers and combinations accurate and secure.

**Maintenance Operation: Unclose a Closed Box.** There are times when a closed box should be reopened--the boxholder was very tardy in paying his or her fees and thus the box was closed in the interim. This tool will allow you to reopen the box and, if the same box is still available, will allow them to have the same box back; otherwise, they will be assigned a different box.

**Maintenance Operation: Undo a Rental Payment.** Naturally, it is always better not to make mistakes when entering data, but on occasion things do go awry. This tool, though not totally automatic, will help remove the last payment from someone's history.

**Maintenance Operation: Undo a Mail Forwarding Procedure.** If you want to reverse a mail forwarding procedure, you can use this tool. It is not totally automatic as you will have to remove some items from the history to complete the operation manually, but it is fairly easy to do.

**Maintenance Operation: Uncancel a Mail Forwarding Client.** There are times when a closed box should be reopened--the boxholder was very tardy in paying his or her fees and thus the box was closed in the interim. This tool will allow you to reopen the box and, if the same box is still available, will allow them to have the same box back; otherwise, they will be assigned a different box. The mail forwarding situation will also be reinitiated.

**Maintenance Operation: Set Lock Combinations.** Since you

have combination locks, this tool creates a place where you can quickly and easily set up the combinations that will be used for each individual lock. If you know the combinations you will be using, you can set them by hand. If you want to set them quickly and have no particular combination in mind, you can use the randomizer to do this for you. You can also go to a special page where you can reset the combination for a specific boxholder. Remember: setting a boxes combination will not effect the combination for a boxholder who occupies the box. You will need to change the combination for the specific boxholder. *See*, the tool for setting combinations on vacant boxes in **Figure 32**. Setting the combinations for vacant boxes in advance will move the combination to the box that is in the process of being rented to someone.

**Maintenance Operation: Diagnostics Area.** Sometimes things go awry and a fix must be made to the underlying structure of your data. This tool will help you do this. As for more information about how to use this tool, check the Diagnostics Area Chapter starting on page 78. You may also want to read the Chapter entitled Boxholder Data Structure to get a feel for how the data within Simon is structured. This Chapter starts on page 52.



**Figure 32:** Set Lock Combinations on Vacant Boxes. This tool also has a randomizer (the button to the far right), where all you do is click on the button a random numbers are generated for the combination.

**Maintenance Operation: Boxholder Builder.** Wow! Has this form changed since it was first introduced in revision 1.46. Well, it

needed to be changed as it was not as friendly as it should be—especially when it came to setting up closed boxes. This new boxholder builder will do it all for you. Setting up your boxholders when you first use Simon can be a difficult process—especially if you have hundreds of boxholders. This tool will allow you to set up box-

holders easily just by adding the names of your boxholders and the boxes they "occupy." You can also add additional detail with this form if you choose to do so.

**Figure 33:** The Boxholder Builder is a great tool for getting your closed and present boxholders into Simon without creating all of the history that may follow these people.

In order to comply with the U.S. Postal Service requirement of adding closed boxes for the six months prior to when the Postal Quarterly Report is due, you should add closed boxes within the last six months. This is easy with this new builder as it will ask for the closing date when your choice is to close the box. See, **Figure 33**.

For more information about the Boxholder Builder, please see Chapter Fourteen: The Boxholder Builder.

### Maintenance Operation: Backup/Restore/Import/Export.

This is an automated tool that will help you accomplish backup and restore operations. First, you will need to tell Simon what folder you want to export to or import from. Then you set the files you want to import or export. Pretty simple. Simon will then create comma-delimited text files of your data in very quick, very small files that you can look at with

**Figure 34:** The Backup/Restore/Import/Export tool will help you protect your data, or bring data in from an outside source.

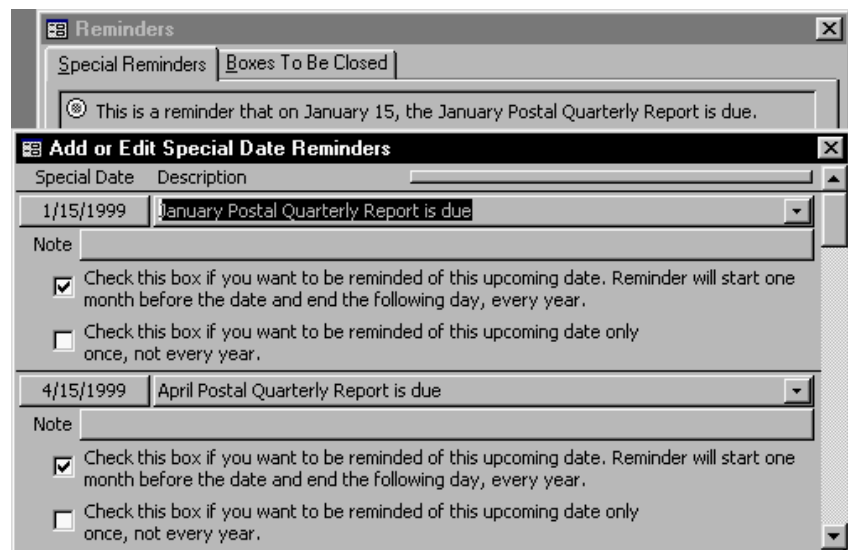
any text editor. More will be said about this wonderful tool in the chapter that starts on page 62.

### Simon Helper Type: Help

By choosing this type of operation in the box at the top of the Simon Helper form, you will see a list of all help operations, of which there are many.

**Help Operation: Consult Help.** This does exactly as its name suggests. There are quite a number of online help screens that will guide you through Simon operations. Check it out.

**Help Operation: Show Reminders.** Reminders are set up to help you remember important dates. When you get this program, only the dates when the USPS quarterly reports are in the system, plus a Christmas reminder from us. You, of course, can add your own reminders; otherwise, it wouldn't be very useful. This, of course, is not an area to be used for reminding of dates when a box should be closed. This information is too fluid for this tool to use. There are other tools in Simon to get this information for you.



**Figure 35:** The Reminders dialog box will post reminders for upcoming special dates like, as shown above, the date when the next Postal Quarterly Report is due. These reminders can happen every year or just for an upcoming date just once.

This reminders area is most useful when reminding you of dates that are coming up that are unrelated to the data in the system. The dates within Simon are already set up with their own reminders that are just as friendly and easy to use.

As you can see in **Figure 35**, the form behind the Add or Edit Special Date Reminders form shows a notice that the January Postal Quarterly Report is due. On or about March 16, 2000, another reminder will show up for the April Quarter Report. The form in front shows that these reminders will appear each and every year. Reminders can also appear for a single future date.

**Help Operation: Show Tip.** By running this item, you can run QuickTips without having to wait until you load the program, which is the normal means of viewing a tip. Tips are a part of quite a number of programs these days and are good for novice users. We have added a special feature whereby you can create your own tips, delete tips you don't want, or even edit all of those nasty typographical errors from my tips.

**Help Operation: Create Your Own Tips.** QuickTips come up when Simon is loaded each and every time, unless you have the audacity to turn them off. They are nice as reminders of how to do projects within Simon. If you want to add your own tips, you can do this. Just remember that the order in which they appear is adjustable by you and that the adjustment numbers must be unique for each tip and there must be no gaps in the numbering, *i.e.*, 1, 2, 3, 4, 5, 6, 7; not 1, 2, 3, 5, 6, 7, 8.

**Help Operation: Reinstate Tips.** You might find the QuickTips that come up when you enter Simon annoying. Shame on you! Just kidding. These tips can be disabled and then reenabled. Use this tool to turn them back on in the event you want them back again after having first turned them off.

## Chapter Three: The Boxholder Information Form

As wonderful as the Simon Helper is at doing your work for you, there are times when you will need to review information about a boxholder without using a helper to guide you on your way. The Boxholder Information form (the second button to the left on the button bar) should do the trick for you. The Boxholder Information form at one point was to be the main form for this program, with some crucial modifications. But, as I pointed out earlier in this manual, mailbox rental and mail forwarding management became too complex to work from a single form, such as this one. Thus, the Boxholder Information form has been relegated to a form where you can view your boxholder information and that's about all you will want to do with it.

Fred		Flintstone		Telephone	555-555-5585	1/10/2000
History	Business	Other Business Info		ID Information		
Home Address		Spouse		Other Names		
5831 Pyroclast Avenue				Note: Nice guy, though a bit course in his mannerisms. Don't let this turkey into the store without at least a pair of sandals as he seems to be shoeless.		
Suite R87						
Bedrock		WY				
58433		USA				
Fax Number		555-555-5586				
E Mail		ff@bsg.com				
Print Form 1583				Other Box Occupants		

**Figure 36:** The Boxholder Information form contains all of the information that you might have entered when opening the box. Most of this information is editable from here.

Most of the information on the Boxholder Information form can be edited. The only information that cannot be edited is the actual box information. If you need to change a key number, combination, or anything pertaining to the box, use a Simon Helper to guide you through this.

All of the information pertaining to the box can be found here except for a few behind-the-scenes items that can only be seen if you use the Diagnostics Area to make edits. Of course, the Diagnostics Area is much more powerful, but a lot more complicated. Read about the Diagnostics Area in its very own chapter starting on page 78.

**Print Form 1583 Button.** If you need to produce a quick 1583 for the boxholder, you can do this from here. It is already filled out with the information on this page. If you have added other occupants for this box, you will need to click on the Other Box Occupants button and print the 1583 for an occupant from the form that will appear after clicking on the button. If you have to make an adjustment to a boxholder's information and then reprint the 1583, this is the page on which to do it. Just make the necessary adjustments to the information and then print the 1583. If you are adding a spouse or children as mail recipients, you may also want to reprint the mailbox label from this page. What a deal!

By the way, there are a number of buttons within Simon that do not contain text to describe what the button does. This was done mainly to conserve space. Just hover the cursor over the button to read a description of what a particular button will do for you.

**Print Customer Address Label Sheet—Avery 5160 Button.** This is the button next to the Print Form 1583 button. This was too wordy for the button so I have a picture on the button that looks like 12 cells below a blue top. This button will print a customer address label

sheet with their box address as you have set it up in Store Preferences. Be aware that there is a much more powerful customer address label sheet tool in the Simon Helper. This tool will only print the address labels one way—with the boxholder name at the top, no company, no spouse.

**Print Mailbox Label Button.** By depressing this button after all of the information is added for the new boxholder and the occupants to the box, a label is created for the back side of your mailbox so you can more easily distribute mail. This label should be printed on plain paper, cut out along the dotted lines and then taped to the bottom, back edge of the box. Use your clear carton sealing tape. I have seen this done—looks great and will not peel off over time. The box number, names of the boxholder and all occupants, the date the box was opened and the telephone of the boxholder will be printed on this label. Try to align the darker block against the front edge of the box. This darker edge will give you the box number and the last name of the boxholder. This will help guide you when distributing the mail.

**Other Box Occupants.** If there are to be other people that will be receiving mail in a particular box, you should add them to the Other Box Occupant form. This form will default to the address you have added for the primary boxholder, but can be changed as needed. You will be able to add two IDs for these people, business information, all sorts of stuff. There is a button for adding another occupant if there will be more than one (the asterisk “\*”), and a button for printing a Form 1583\*.

\* This button should be used if this is a new occupant that is being added to a box that was opened some time ago. As a rule, 1583s are printed for all occupants and boxholders on a box at the time the box is opened. In some cases, a new occupant is added later and this button will print a 1583 for just this one person. There is also a Simon Helper to handle this for you.

**Box Information Tab Control.** Like I mentioned above, most of the information within the Boxholder Information form is editable. The information on the Box Information tab control cannot be edited, except for the quoted rent fees area. If you need to edit the size, key number or combination, you should do this from the Diagnostics Area. If you want to change the status of the box, the box number or the number of keys a boxholder has in his or her possession, you should use a Simon Helper tool to do this for you. The reason for this is that these three items are sensitive to the boxholder’s

History	Business	Other Business Info	ID Information
Home Address	Spouse	Other Names	Box Information

**Box Status** Open--With Forwarding

**Box Number** 134      **Size** 5

**Combination** Right 36   Left 27   Right 29

Quoted Rent Fees	1 Month	3 Months	6 Months	12 Months
	\$0.00	\$20.00	\$35.00	\$65.00

Rent fees quoted as a zero amount denotes an unavailable duration.

**Print Form 1583**      **Other Box Occupants**

Figure 37: The Box Information tab control on the Boxholder Information page.

situation at your store. If you arbitrarily go in and reduce the number of keys a boxholder has in his or her position without letting the proper Simon Helper tool handle this for you, when it becomes time to close the box, Simon may offer a larger key deposit refund than should be made. Also, if you change the status of the box without going through the proper steps, this client may no longer appear as a client within the Simon Helper. So, now you know why certain things are not editable from this form. But they are editable from the Diagnostics Area, and there are warnings about making changes there.

**Box Information (Archive).** As of revision 1.54, you can now browse through the archived ex-boxholders using a tool very much like the box information form. This new box information form for use with archived ex-boxholders can be found by choosing Process on the menu, then Boxholders, and then Boxholder Information (Archive). When it comes up, as illustrated in , it is very similar to the other boxholder information form, except it is limited to providing information on closed boxholders. Functionally it does much less since it is used primary to find people who are no longer at the store and thus few changes will need to be made here.

**Figure 38:** Another Boxholder Information form just for those who have closed their boxes in the past.



## Chapter Four: Boxholder Data Structure

This chapter will, hopefully, help you understand how data is kept within Simon. This may give you some insight into why things are done the way they are.

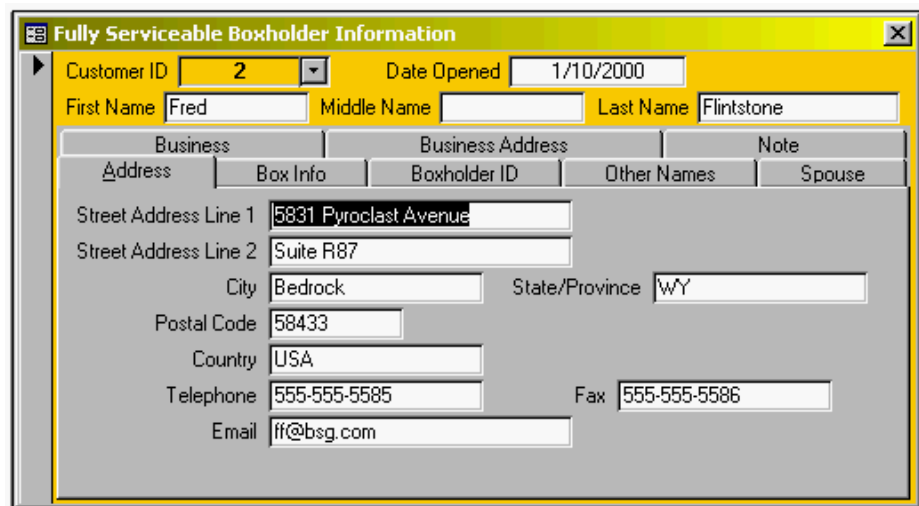
**Databases Explained.** Databases are written so that the data placed there can expand and contract with as few limitations as possible. Tables are the containers that hold the fields that keep specific items of data intact. For instance, a person's first name is a field. Some developers will just keep the entire name of a person in a field called, for instance, name, but this type of field will be difficult to work with when you want to organize the data in last name, first name order. If the name field is added and expressed in last name, first name order already, then this problem will be solved, but now you will have difficulty using a person's first name in a salutation to a letter, *i.e.*, Dear Mark. So, separating pieces of information into separate fields is important.

In essence, then, it behooves you to separate like information into separate fields so that the information can be easily ferreted out for some odd report you may want to create.

On a larger scale, the entire group of fields used in a database should be grouped into smaller groups of like information. For example, boxholder information should be separated into a different table, or tables, from box occupant information, or the history maintained about the box rental, *etc.*

The reason for this is simple, but not so easy to understand at first. You have a person who rents a mailbox from you. The information for this person is located in a table called boxholders. You have two other occupants in this box that are not related to the boxholder by marriage or as children of the boxholder. This information is stored in a separate table called occupants. The history of events that has taken place for this boxholder is stored in a separate table called history. The reason for these separate tables is because if you add fields for history in the boxholder table, only one item of history could be added for a boxholder, unless you are willing to add all of the boxholder data over and over again each time a history item is added. Not feasible. This would cause a huge amount of redundant information to be stored and thus making your database incredibly large.

So you have one boxholder, with two occupants, and thirty-five pieces of history for the box. How does the database keep all of this straight. The data's integrity is guaranteed by what they call primary and foreign keys. Simply put, each boxholder is given a unique value, say a number, and this number is used to note all connections to data



The screenshot shows a software window titled "Fully Serviceable Boxholder Information". The form contains the following fields and values:

- Customer ID: 2
- Date Opened: 1/10/2000
- First Name: Fred
- Middle Name: (empty)
- Last Name: Flintstone

Business		Business Address		Note	
Address	Box Info	Boxholder ID	Other Names	Spouse	
Street Address Line 1	5831 Pyroclast Avenue				
Street Address Line 2	Suite R87				
City	Bedrock	State/Province	WY		
Postal Code	58433				
Country	USA				
Telephone	555-555-5585	Fax	555-555-5586		
Email	ff@bsg.com				

**Figure 39:** Fully Serviceable Boxholder Information from the Diagnostics Area. Note that Fred Flintstone has a Customer ID of 2.

in other tables. For instance, Mark is boxholder number 593. This value is stored with Mark in the boxholder information table. Each occupant in Mark's box has a field that attaches to the boxholder table using this number. So, there is a field in the occupant table with 593 in it. All history items in the history table relating to Mark's box will have a field with 593 in it as well. These items are linked so that when you want to look at Mark's box history, the history will only show the items that contain a field with the number 593 in it. As you can see, the number of occupants can grow or contract based on occupants that have a 593, and history can grow forever based on the same theory. So, once a boxholder has been at your store for ten years and has 410 pieces of history, all of this history can be reported as belonging to him depending on the primary/foreign key relationship.

Simon is much more complex than this, but the theory works the same way. In fact, the relationships between boxholders, occupants, history, forwarding situations, all work just as outlined. If you go to the Diagnostics Area, you will see that each boxholder is assigned an ID number. As shown in **Figure**

History ID	Customer ID	Date	Description
6	2	1/25/2000	DUE: Mail forwarding.
5	2	1/10/2000	FORWARD: Initial deposit.
4	2	1/10/2001	DUE: Mailbox rent.
3	2	1/10/2000	FORWARD: Mail forwarding fee.
2	2	1/10/2000	OPEN: Initial key deposit.
1	2	1/10/2000	OPEN: 12 months.

This is used to note that a particular rent due bill was paid.  
 Rent Amount: \$0.00      Deposit Amount: \$0.00

This is used to note that a particular forwarding task has been accomplished.  
 Forwarding Income: \$0.00      Forwarding Cost: \$0.00

Is this item taxable?

**Figure 40:** Fully Serviceable History from the Diagnostics Area. By dropping down the History ID combo box list, you will see all of the entries for Fred. Of course, if you have a lot of boxholders, this list will contain information for all of your boxholders. The second column in the drop-down list denotes the Customer ID as assigned to Fred.

**39,** Fred Flintstone has been assigned the Customer ID of 2. This number is assigned to Fred by Simon and is guaranteed to be unique (only Fred will have this number). Pick a boxholder from the list and remember his or her number. If you close the boxholder table and open the history table, you will find a bunch of history items that are connected to this number. If you are familiar with this person's history, you will recognize the history items as truly belonging to this person. As shown in **Figure 40**, Fred has six history items.

Now, if you go to the Boxholder Information form (second button from left on the button bar), and locate this person by dropping down the Customer Lookup combo box at the top, you can go to the history page and find that this person's history is identical to what was displayed within the Diagnostic Area. That's how it all works.

Within Simon, there are quite a number of tables. Some are there just to keep track of the options you will be using in your store. When the option comes into play, *i.e.*, you are renting a box and Simon needs to know how much you charge for boxes, a prices table is accessed and the information within this table is used to set the fees that you will be charging for a specific size of box. Another example is that you are created a letter to a mail forwarding client stating that their mailbox rental fee is due. At the top of this letter is a letterhead with your store information listed. This information does not appear here because of how

smart Simon is, it is here because you entered this information into Simon after you installed it. The options you set in Simon will be used in some way or another, otherwise, I would not have asked the questions that I have asked the first time you entered Simon.

All tables built to house all of this information are located within databases. In Microsoft Access all tables are built into databases. In essence, any MS Access database can contain any number of tables that house data. The databases that comprise the Simon system house anywhere from one to twelve different tables, and there are sixteen databases in the Simon system. The forms that you view within Simon, like the forms shown throughout this manual, are loaded with code that acts upon this data in truly wondrous ways to mold your information the way you want it.

Smaller databases can get away with having all of the database code and data located within the same database. The only problem with this is that if we were to create a patch that fixes a problem with the program, we would have to send you a patch that will replace not only the code, but will replace your data as well. Not good when you have 700 boxholders in your system. The way to eliminate this problem is to separate the data tables from the code. So, Simon is built with databases that contain only data, and the main database called `simon.mdb`, that contains all of the forms, reports and code. Thus, when we have to replace code within Simon, we only mess with `simon.mdb`, and since none of your important data is located within `simon.mdb`, none of your data is in jeopardy of being wiped out.

**Simon Explained.** Simon is separated into a number of databases, sixteen to be exact. The file `simon.mdb` is the main source code for the program. Replacing this rather large file will not interfere with your data at all. We do replace the source code often, so having the data in this file with the source code would have been a huge programming blunder.

Some data that we use in Simon is changed regularly as well. So, this type of data will have to be separate from your store data. For instance, we have a separate database that keeps track of Simon Helper operations. The Simon Helper table keeps track of the group types, *i.e.*, Mailbox Rental, Mail Forwarding, Maintenance; the operations, *i.e.*, Add a New Boxholder, Rent Payment; the sort order of each operation (a number that will order the Simon Helper operations the way you want them, and a boolean data type (yes/no) for noting whether or not you want a specific operation listed on the Simon Helper form. If this information was located with your data, we would not be able to easily add new operations to the Simon Helper. Thus, when you suggest that we add a telephone list to the reports available under the Simon Helper, we would have difficulty trying to do what would appear to be a fairly simple programming feat.

We have split a lot of this information out into their own databases so that it will be simpler for us to expand features and add new elements to the Simon system without interfering with unrelated items. Hopefully, this system of building Simon will allow upgrades and such to be managed without having to create major overhauls to the entire system.

**Upgrade/Patch Engineering.** Upgrade/patch engineering can be fairly complicated. I would like to explain what would happen in a typical upgrade process.

For revision number 1.52, we had a suggestion from a client to add the ability to keep track of combination lock combinations and allow for their use in a more meaningful way. What I mean by this is, sure, Simon will work with combination locks before revision 1.52, but no information about combination locks is saved within the system. And, furthermore, those using combination locks will have to endure a bunch of key nonsense every time they try to do a Simon operation. We wanted to make the use of combination locks a good experience for those using them so we had to modify Simon quite a bit to handle it.

We also wanted to fix some problems we have found with the way the backup/restore/import/export tool works and to create a way for the data tables to relink to the source code table automatically. The import/export tool would only send backups to the default folder for your system which is probably My Documents. This is not at all what we had in mind when we wrote this feature, so we needed to upgrade its usability. The relinking tool, on the other hand, is necessary for those who want the data files located somewhere other than the c:\simon folder, *i.e.*, in a network where two or three Simon applications use the same data. The data would be located on a server and all instances of Simon on different computers would use the data that is located on the server computer. Also, we wanted to make it easy to run Simon from the D drive or anywhere else you want, and in any folder scheme that you want to use.

On the path to building all of these new tools and operations, a number of errors were addressed as well.

The combination lock problem did challenge us a bit. This addition would require that we add some new fields to the data tables where you will be, or have, added your store's boxholder information. This is a bit tricky since there is no way we want to mess with the data you have on your machines. We used some cute DAO routines to create some new options in the store options table. Options that were added are: what type of entry is used to your boxes (key/combination/both), if both what type represents the majority, how many turns of the dial necessary to enter the box, what direction is the first turn (right/left), combination instructions, combination lock start number and end number. These were the only options we thought were necessary to create a combination lock system.

Of course, fields would need to be added to the boxholder, boxholder archive, boxholder interim, and box tables to keep track of the entry type for a specific box and the combination (if indeed it is a combo lock) for a box.

Now that we have written the code for these fields to be created, we needed a way to add these fields to the appropriate tables once the patch is installed on your computer. We also had to deal with some hurdles regarding questions like, what if the fields already exist, *i.e.*, the version the client is running is revision 1.52 or later, or the patch had already been run once. We had to make sure that these fields were only added once. Actually, they can only be added once, but a fatal error will surely happen if Simon tries to copy new fields where they already exist. Even if MS Access were smart enough not to crash and ignore the error, we certainly wouldn't want Simon to have to grunt through all of these each and every time you entered Simon. Chug, chug, chug.

In order to deal with these problems, we had to add a special field to a table that resides in the Simon program database that keeps track of a simple number. The number "1" means the field setup routines should be run, the number "2" means the fields setup routines are not to be run. The patch will have the number set to "1" and any programs we send out on CD from now on will have the number set to "2" since we will have already added these fields to the appropriate tables. This takes care of the performance issue on startup.

We also added some error trapping code that would ignore all fields already in existence if the field setup routines are to be run. This code simply looks at the field and says "create it, ah no, it already exists, well just go create the next field," no muss no fuss.

New tools and code had to be added to Simon to use these fields otherwise what would be the point of adding all of this data if it were not going to be used. Quite a number of the items under the Simon Helper were modified to check to see if combination locks are in the box to be worked on. If so, other things happen.

The relinking tool and the import/export tool both required the addition of new fields. But these fields were added to new tables so there is no problem with interference with other data items. Tools were created so that you can import/export into any folder, drive, whatever, you want, just by telling Simon where you want to import/export.

The relinking tool was coded so that each table in the system (over forty of them) will be relinked to a specific folder or, if the data tables cannot be found where you have told Simon to look, Simon will ask you to find the file by offering a dialog box listing of your system. Cool!

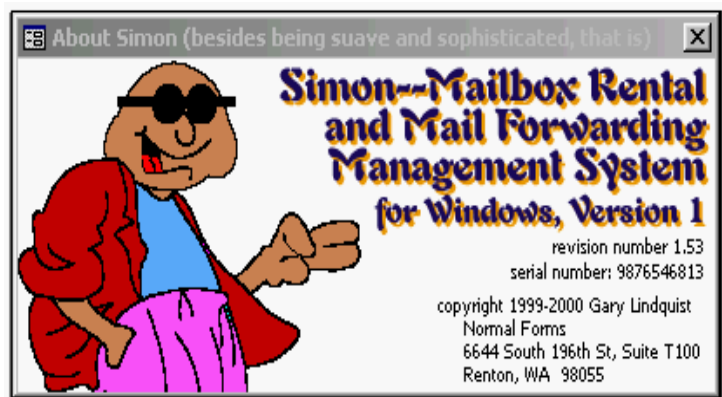
After all of this is complete, the fields need to be set to the values we want them to start at, and then the files need to be zipped down into compressed files and then an executable file must be created to make your lives easier.

The processes necessary to create this rather major revision took approximately 80 hours to accomplish (including debugging).

Some upgrades and patch routines can take less than an hour, but most will require an amount of time somewhere in between these to extremes.

Was this instructive?

**Upgrade/Patch Availability.** Just like any great program, to keep it in tip-top shape, we need to make adjustments now and then. We make these adjustments available to you by way of our Web site at <http://www.bnl.com/bss> in an area we call patches. If you want to keep up with all of the added features, error fixes, and program enhancements, you should visit the Web site and download any patches you do not have.



**Figure 41:** About this Software box for Simon notes that the revision number is 1.53.

When in Simon, go to the menu, click on Help, click on About this Software. A dialog box will appear where you can find out at what revision number Simon is operating. On your computer. As shown in **Figure 41**, this software is at revision 1.53. If your computer's revision number is equal to the latest patch number that is available for Simon, you are fine and need not download anything. However, if you are behind, you should read any instructions carefully and proceed with the download and installing of the patch or patches.

## Chapter Five: Mail Forwarding Operations

One truism can be said about your mail forwarding clients: they are a bonafide boxholder at your store. Therefore, they must be made a boxholder concurrently, or before, they become a mail forwarding client. Simon will create a boxholder as a mail forwarding client at the time the box is opened, or will change a non-mail forwarding boxholder to a mail forwarding boxholder any time after the box is opened. Simon Helper tools are available for either situation.

Some additional information is taken from the client if they want mail forwarding services. For instance, you will need to know the address where mail will be forwarded. Usually, they will want the mail forwarded to the same address as they list for their address as a boxholder, but this is not always the case. Thus, we have added fields in a different location to keep track of to where the client wants the mail forwarded. Also, you will need credit card information if they want the forwarding fees taken directly from their credit card. And, the initial deposit, minimum funds, typical deposit, frequency of forwarding, amongst other things, will be stored with the client.

### **Closed Box–With Forwarding**

When a boxholder comes in to close his or her box, one of the questions that should be asked is if he or she would like to have his or her mail forwarded. If this boxholder does wish this, then you will choose as status: Closed Box–With Forwarding.

This option is set automatically when you choose to do a one-time forwarding option from the close box under Simon Helper operations. The Post Office pretty much requires this at the end of six months after a box is closed. Of course, if you have no forwarding address to forward to, how can you do this. One-time forwarding will set a date in the future when forwarding should happen and, after you do forward the mail for this customer, you will be prompted as to whether the box should be closed, or not, after you accomplish this forwarding operation. Under store preferences, you can change the timings on this, but it is, by default, set for 183 days, which is a bit more than six months (just as the Post Office requires).

If this client wants your store to forward more than once and has paid a deposit to have mail forwarded for some time, then you will want to choose an option other than the one-time forwarding operation.

By the way, if you use the one-time forwarding operation, the boxholder will show up on the Postal Quarterly Report as a closed box, thus a boxholder wanting forwarding for an indeterminate amount of time, should not be designated as one-time.

### **Open–With Forwarding**

The “Open–With Forwarding” designation is used on a box that is set up for mail forwarding. You can set a box up for mail forwarding at opening of the box or any time thereafter. If a person wants mail forwarding for an indeterminate amount of time, this is the operation to choose. It is not a good idea to choose one-time forwarding unless it is fairly clear that one-time forwarding is exactly what the client will do.

## What the Heck's an "F" Box

When you initially use the Box Builder tool, or even if you use the Add Box Builder tool to add boxes later, you should consider adding a group of boxes with the "F" designator. These should be given numbers that are not associated with numbers that exist in your present front-access box system. These boxes are containers you will place in your back room where you can place mail for mail forwarding clients that do not need a front-access box. Why would you tie up a front-access box with someone's mail who has no use for it? Right?!? For most clients that are opening a box for mail forwarding, and for most of those wanting to change to a mail forwarding situation, they will not need front access to the mailbox. In these cases, there is no need to tie up one of your expensive front access boxes just for mail forwarding. You should use a forwarding numbered box in these cases. If the client needs front access as well, then use a regular front-access box. You can set a different pricing structure for the "F" type box, also.

## Mail Forwarding Frequency Choices

Daily	This sets up the forwarding service to happen on a daily basis. You will be notified daily that forwarding is needed.
Twice a Week	This sets up the forwarding service to happen twice a week. Every three days you will be notified that forwarding is needed.
Weekly	This sets up the forwarding service to happen every week. Every seven days you will be notified that forwarding is needed.
Twice a Month	This sets up the forwarding service to happen every other week. Every fifteen days you will be notified that forwarding is needed.
Monthly	This sets up the forwarding service to happen every month. Every 30 days you will be notified that forwarding is needed.
Quarterly	This sets up the forwarding service to happen every three months. Every 90 days you will be notified that forwarding is needed.
As Necessary	This sets up the forwarding service to happen randomly. Every ten days you will be notified that forwarding is needed. Of course, you will not have to forwarding until you get ready to do so.
One-Time	This sets up the forwarding service to happen once. The date to notify you that forwarding is needed is set in your Store Preferences. After the mail is sent, a message box will appear asking if it is time to close this box. If so, this will happen pretty much automatically.
Customer Will Call	This will notify you that forwarding is due, but action should not be taken until customer calls. Simon assumes in this case that the customer will keep you informed of when to forward mail.

Of course, if mail forwarding frequency needs to be changed a few months down the road, this can easily be done by going to the Simon Helper and choosing to change forwarding orders.

The "one-time" frequency choice is unique in that it will spawn a message asking if it is time to close the box after each time the mail is sent out. Actually most entries made in this system, and many of the automatic entries made by the system, can be altered at your pleasure.

When you choose to run a Forward Mail operation from the Simon Helper or the one called Other Service, you will first be asked to choose the mail forwarding client from the list. Once you have done this, you will move to the next screen. This screen shows the information on the forwarding order and the amount of funds available for forwarding. Go to the next screen, unless you want to change the forwarding orders. The next screen is where you choose the subject at the top of the dialog box and then itemize the income and cost items. Move to a blank item so the amounts at the bottom will be correct and then finalize the event. See Figure 42.

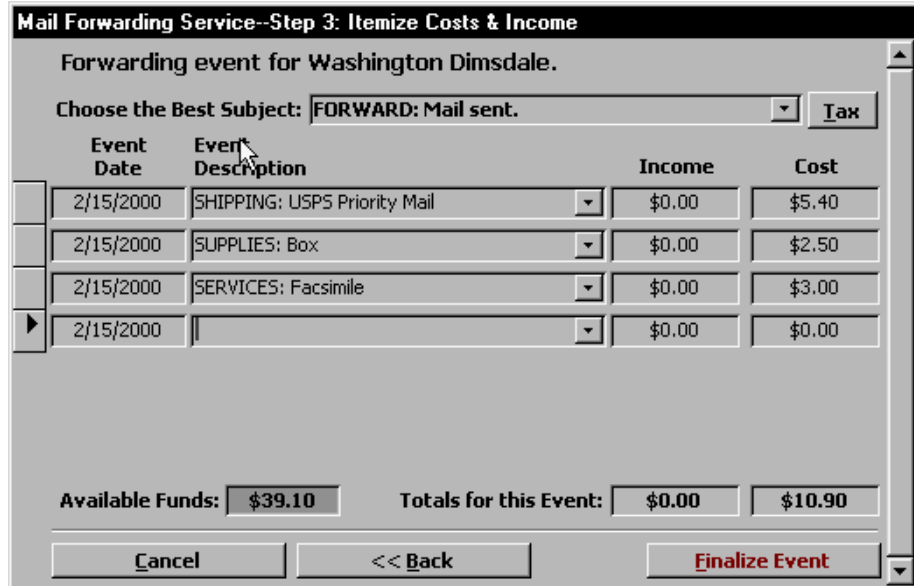


Figure 42: The Mail Forwarding Event screen allows you to itemize the costs or income derived from mail forwarding. The Finalize Event will complete the process and, depending on options set in Store Preferences, may invoice the event.

### Mail Forwarding Taxes

After you have added the detail for which you will be billing the customer, you should click on the Tax button, or Alt+T, to calculate taxes for the items in the list that require your collection of tax. See, Figure 43. Of course, if you have not set up Simon to deal with your tax issues, you can add taxes manually or not add taxes at all. If you would like to have Simon calculate taxes for you, this can be done from Store Preferences using the same interface as illustrated on Page 15.

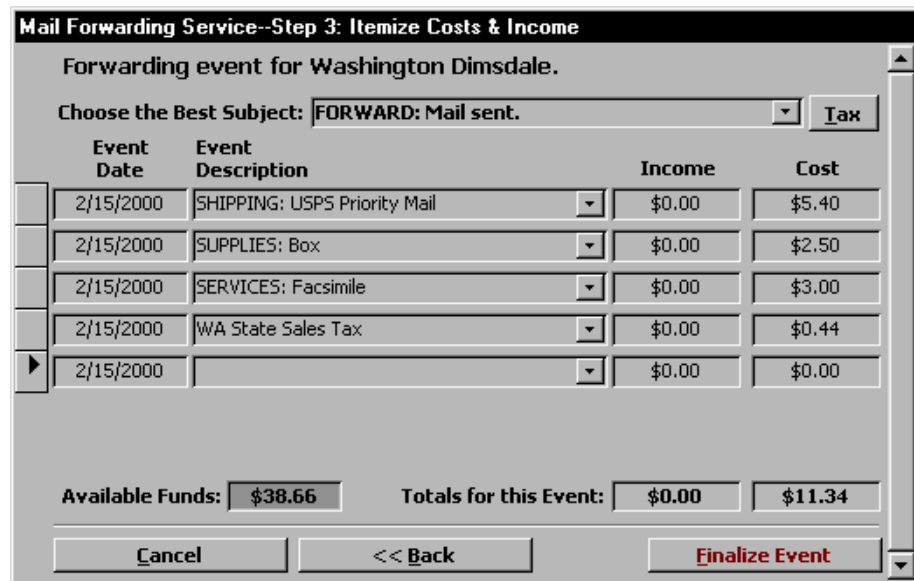


Figure 43: Adding tax is simply a matter of clicking the Tax button towards the top of this form.

**Finalize Event**

When you click on Finalize Event, you might see a dialog box asking if you would like to invoice this event. This message box may not appear depending on the options you have set in the Store Preferences area.

If you have chosen to invoice this event, an invoice will be printed for the client. This invoice should be sent to the client along with his or her mail. If the funds are low for the customer, a dialog box will ask if you want to make notice to the client that they are low on funds. If you want to give notice on this invoice, a nice message will be posted to the invoice.

The Finalize event will add an item to your history for this client and another due date for forwarding.

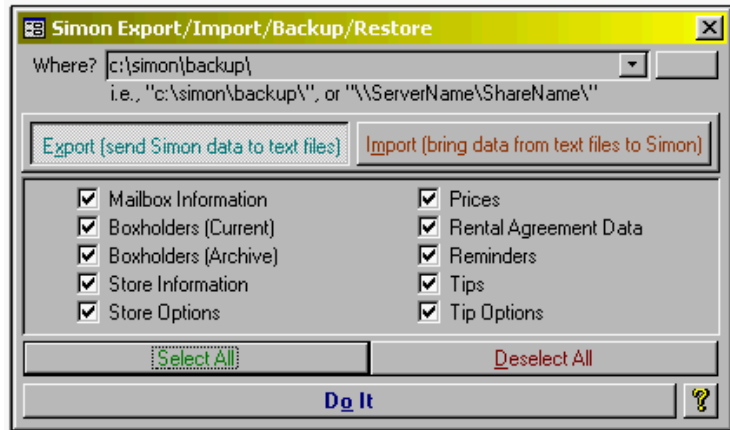
## Chapter Six: Backup and Restore Data

The backup/restore/import/export tool, is available from a button on the button bar and from the Simon Helper. This tool was revised with revision number 1.52 and is a much more valuable tool as it sits right now.

### Backup/Export Operation

Backing up your data occasionally is a very important step to maintaining your system and insuring that you will always be able to get your data back if something were to go wrong with your data in the database data tables. Even though this is highly unlikely, having to retype all of your data into Simon again is something that should be avoided. You should make a schedule for backups and stick to this schedule. Hey, it only takes a few seconds.

To bring up the dialog box that will guide you through the backup/export operation, you can either choose the button with the blue left arrow and the red right arrow, or by navigating to the Maintenance operations using the Simon Helper and then choosing Backup/Restore/Import/Export and then clicking on Next Screen. See, **Figure 44**.

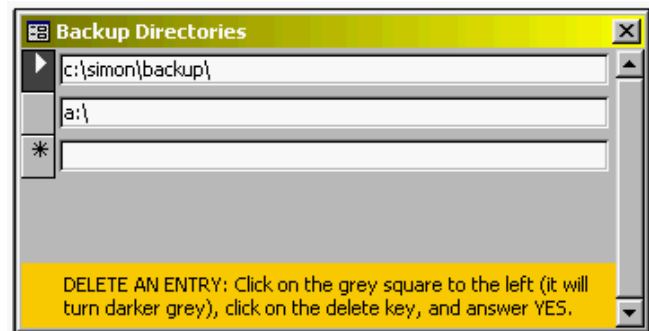


**Figure 44:** The wonderful Simon Export/Import/Backup/Restore tool can be used to make backups of your system, to import in information to Simon, to restore data after a fatal crash.

The dialog box that will appear has a combo box at the top where you will either drop down a list of the places you backup your data, or if there is a location where you want to create your backups not on the list, type in the new item and it will appear on the list the next time you enter the combo box. Make sure that you use the proper syntax when typing in a new location. The following “\” is an absolute necessity.

After you have set an Export location, be sure the “Export (send Simon data to text files)” button is depressed, choose the data files that you would like to backup by clicking on any of the little check boxes by the name of the data type, or choosing Select All.

Once you have made your choices, you should click on the “Do It” button. The process is complete and will only take a few seconds. Check in the folder where you supposedly send the data to make sure there are text files there and that they are dated with the correct date. If the text files are not there or the date is wrong, then the files were probably sent elsewhere. Check to see if they are located elsewhere on your computer. If the syntax you used in the “Where?” box is faulty, your data will not be exported. If the combo



**Figure 45:** From here, you can delete unwanted backup directories.

box at the top of the screen has an item, or items, that are incorrect, you can remove them by clicking on the button located just to the right of the combo box at the top. A dialog box will appear where you will be able to delete any unwanted items from the list of available export locations. After the dialog box is on the screen, just click on the little grey rectangle to the left of the item you want to delete, hit the delete key on your keyboard and answer YES to the question that will appear. *See, Figure 45.*

By the way, there are a number of buttons within Simon that either have an image or nothing on them at all, such as the button just mentioned for editing the backup locations list. If you are unsure of the purpose for a specific button, just hover the cursor over the button and a message will appear that will tell what the button does.

The files that are created by this process are comma-delimited text files. These types of files can be read by most programs on the market today that work with export/import capabilities, so you should be able to use the data possibly in other programs.

### **Restore Operation**

In the event your database becomes irreparably damaged, you may have to reinstall Simon and then restore a fresh backup copy of your data from these comma-delimited text files.

Before doing this, you should try to repair the database first. You can run the repair utilities by double clicking on the repair icons in the Simon folder in the Start menu. Usually a database that has been corrupted can be repaired using these tools. Before restoring from a backup, attempts should be made to recover the data in this manner.

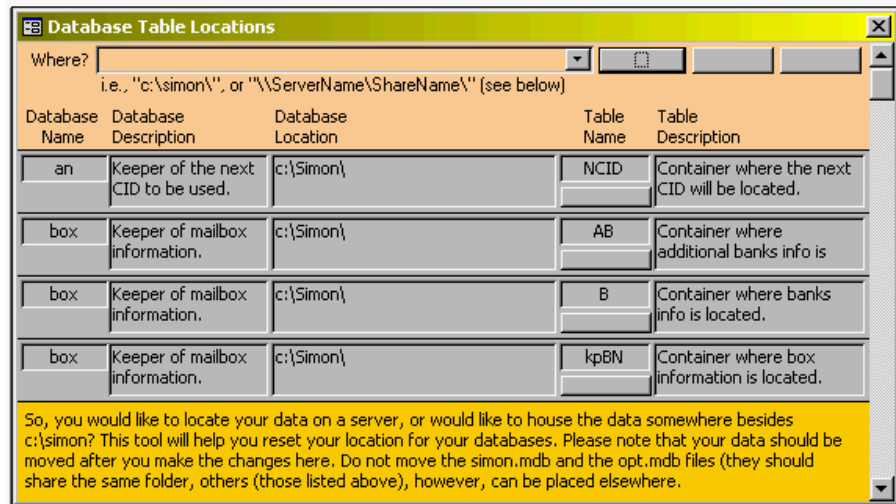
Please be aware that attempting to import/restore data back into a system that is working properly and the data is clearly fine, will replace the data with what is in the backup files. This data may be older than the data already in the system and there is no turning back from this. So, do be careful and do not restore information back unless you are sure that the backup is fresher or your only option to getting your system running again. If in doubt, make a copy of your entire Simon folder and name it something else. This way you guarantee that if something were to go wrong, you can always delete the Simon folder and rename the backup folder you just created to Simon and all will work as it should.

There is another use for the backup and restore feature. You might be using Simon at the store, and adding clients at home using Simon there. You can backup the Simon data to a diskette or two, restore the data at home using the import feature, and then exporting it back to diskette for return to the store. Please do be careful using this tool however. It would not hurt to make backups of all of your \*.mdb files to a safe location on your hard drive before attempting this.

## Chapter Seven: Linked Table Manager

If you have installed Simon into a folder somewhere other than where the install program suggests, the first time entering Simon, the program will have to go out and find the data. This is simple when the data is in the same folder with the `simon.mdb` file. When installing Simon from the CD, the install program will not have it any other way. If the data is indeed in the same folder with the main program file, `simon.mdb`, the relinking is automatic.

If you do decide to have the data files in a separate folder away from the program file, or if you are setting up a network situation, you will have to use the Linked Table Manager to reestablish the data links from the Simon program. The Linked Table Manager can be found from the menu under **T**ools, **L**inked Table Manager, or click on the button that looks like chain links.



**Figure 46:** The Linked Table Manager can get your network situation set up in a snap.

Please be aware that if you move all of the data files (all files with the `.mdb` extension, except the `simon.mdb`), it is a good idea to keep the `opt.mdb` file in the same folder with the `simon.mdb` file. If you will be setting up a network situation, you will always need the `simon.mdb` located in a folder on each workstation.

By the way, there are three buttons at the top of this form next to the combo box entitled "Where?". The button closest to the combo box will set the Database Location in the below table to whatever is set in the combo box. The middle button, will bring up a dialog box where you can edit or remove database locations that are wrong or are no longer needed. And, the last button in the list will automatically relink the data database in the below table to the locations as noted in the Database Location text boxes.

### Setting Up a Network Situation

You should install Simon on each machine that is connected to your network. Remember, each machine that you install Simon on does require a separate license. After installing Simon on each network machine, enter each application and go to the Linked Table Manager. Once you are in the Linked Table Manager, type or select (using the combo box) the location where your networked data files can be found. Once you have entered the location into the combo box at the top of the form, click the button next to the combo box to tell Simon to look for everything there. Notice that the Database Location boxes in the chart below will show the new address.

If you really feel adventurous, you could also locate certain databases elsewhere. Do you see the grey button below the Table Name in **Figure 46**? This button will set that specific database to whatever location is in the "Where?" box at the top. So, you could set the "Where?" box for one location and then click on some of the Table Name buttons, change the "Where?" box to a different location and then click on the button for some of the other Table Names. Doing this is fine and Simon will find and relink all of these databases fine. Though I can't imagine why anyone would do this.

Close Simon and then go to either My Computer or the Windows Explorer and navigate to the folder where the Simon program is installed on the workstation. Delete all of the .mdb files, except the simon.mdb and the opt.mdb files.

Now, assuming that all of the data files are set up on the server as they should already be, in the locations where the workstation can find them, you can reenter Simon on the workstation and the links will be set up automatically to the new networked location. If you have mistyped the network location, Simon will not be able to find them and will bring up a dialog box asking you to go find them. You will be able to browse for the file that it asks for. Once you have found that file that it could not locate, it should be able to find the rest, provided that they are all located in the same folder.

You can do the same thing with each workstation on the network.

Each time you install a new patch to Simon, the relinking process will take place, which will require that you choose the server location from a dialog box. After you do the re-linking, you should check within the Linked Table Manager to make sure that the server location is properly located there.

### **Automatic Relinking of Data Tables**

Remember that third button (the one to the far right of the three at the top)? You can use this button to automatically relink all of your data tables to the Database Locations as noted in the below table. This, of course, will only work if you know for a fact that the data is actually present in this new location.

This tool is infinitely valuable for those who might want to install Simon at home and work on the data for several different stores from the same Simon installation.

To do this, you will add folders to your hard drive for each store that you own, *i.e.*, c:\Store153, c:\Store179, c:\Store421, c:\Store613. Then you will add the data database files (all the .mdb files except the simon.mdb and the opt.mdb files) for each store to these folders.

After you have all of the data databases set up for each store in the appropriate folder, you should make sure that all of the data database files in the Simon folder are deleted, except simon.mdb and opt.mdb.

Now the first time you enter Simon after this, you will be asked to locate the data databases. Just choose the correct file for one of the stores. We will go in to set up each store

after we get into Simon. By the way, the dialog box that comes up asking you to locate the data files is asking for a specific file, usually "an.mdb." Be sure to choose this file when you have located the proper folder.

Once you have located the file, you will enter Simon because Simon will be able to locate the rest of the tables based on your one choice, unless you have the data files spread out all over the place, which you won't under this scenario.

Open up the Linked Table Manager. You should see that all of the Database Locations are now set for one of the stores of the four we added. Type "c:\Store153\" in the "Where?" box and hit tab. Be sure to add the trailing "\". This store is now a part of the list so you will be able to retrieve it easy the next time. Do the same thing for the other three stores.

Choose any one of these stores in the "Where?" box and then click on the button closest to the "Where?" combo box. You will notice that this store location is now listed under Database Locations, though it is not relinked yet. Click on the farthest button to the right of the "Where?" combo box. This will take a few seconds to relink to this new store's data. That's it. You will now be working with this store's information.

If you want to change stores just go the Linked Table Manager, add the new store location to the "Where?" box, click on the nearest button and then the farthest button from the combo box. It's done.



## Chapter Eight: Database Repair

If, God forbid, your system should crash while Simon is open, you may have to repair the data databases. In fact, if your system should crash while Simon is open, do make a point to repair the database upon opening it the next time. What are the symptoms to look for when data is corrupt. Well, simply, you will get an error message that certain data cannot be found. If you are sure that the proper file is located in the correct folder, the obvious diagnosis is that the data is not being recognized and, thus, corrupted.

To repair your database, be sure Simon is closed, go to the Start menu, Programs, Simon. There are a dozen or so repair tools in the Simon folder there. Run the ones that seem to be connected to the errors. Do include the Repair Simon to the list of repairs to be made. For instance, if box information is not being found, then repair the Boxes database. Alternatively, if customer information appears not to be found, repair Your Data. Try to run Simon again and, hopefully, Simon will run as it should. The repair tools in this folder cannot cause any damage of their own, so don't worry about running them, they are fine anytime, even if your data is okay.

In some cases there is no way to repair a broken database. This should not, however, worry you too much, if you have been good about backing up your data every time you make changes. If the database cannot be repaired, go to the Database Backup and Restore section starting on page 62, and run a restore of the backed up information you should have on hand. You should be doing a backup every day.



## Chapter Nine: Database Compacting

As you work with this database, you may notice that, over time, the database file sizes will tend to grow beyond what you feel is justified for the amount of data housed in the database. This is true due to the fact that data added and deleted, moved, etc., will not release space back as available space unless you compact. Compacting should be done once a month, depending on the amount of work you do in this program. If you have a very busy mailbox rental business, you may want to do this more often.

Compacting can easily be done by clicking on the Start button, Programs, Simon and then using each repair tool there. As part of the repair function, the compact operation is done automatically.

**You should close Simon before compacting the databases.**



## Chapter Ten: Troubleshooting

Hopefully, I will be able to spend a little time adding some information that might help you get Simon to work for you if you should run into problems. We are fairly certain that few problems exist, so the listing here might be a little on the short side. If you are having problems with Simon, you should let us know so we can fix them. You can reach us by email at [staff@bnl.com](mailto:staff@bnl.com) or by calling us at 425-251-6354. We will typically have a patch available to fix legitimate problems within a few days if you report them. Some problems, however, may take a little longer than this. If you report a problem, we will let you know when a fix is available. If we are unaware of a problem, obviously, it will not get fixed.

By the way, we are very responsive to our clients when they need our help, so don't feel like you are putting us out—you are actually helping us create a better program and we are thankful for that.

**Cannot find system.mdw file.** This is a known problem with installations where you have MS Access 2000 installed on your computer. MS Access 2000 relocates the system.mdw file so that it can no longer be found. On newer installations of Simon, a special tag is added to the end of the target line that opens Simon and all of the repair tools. This added tag to the target line fixes the problem by letting Simon know exactly where to find the system.mdw file.

The command line behind the icon to open Simon can be found by right clicking on the Start button, click on Open. A window will appear. Double click on the Programs folder icon, double click on the Simon folder icon and right click on the icon that opens the Simon Program. A shortcut menu will appear, choose Properties and click on the Shortcut tab. In the dialog box a target line will have something like one of the below:

```
"C:\Program Files\Microsoft Office\Office\msaccess.exe" /runtime "C:\Simon\simon.mdb"  
"msaccess.exe" /runtime "C:\Simon\simon.mdb"  
"C:\NormalForms\Dex\msaccess.exe" /runtime "C:\Simon\simon.mdb"
```

The line should be edited by adding the following to the end of the line:

```
/wrkgrp "<drive where Simon is located>:\<folder where Simon is located>\system.mdw"  
example: /wrkgrp "c:\simon\system.mdw"
```

This is what one of the entire lines might look like:

```
"msaccess.exe" /runtime "C:\Simon\simon.mdb" /wrkgrp "c:\simon\system.mdw"
```

Be sure that a space is placed before the forward slash. This extra line will locate the work-group file for the runtime version of Access, which is running Simon for you. One little caveat: the system.mdw file may not be located in the Simon folder. You should go find the system.mdw file (usually in the c:\windows\system folder) and make a copy of this file and drop it into the Simon folder.

**Cannot find <any file except above> file.** It depends on what the file is. You may want to call us about these messages. But first, you should make sure that the data files are where Simon expects them. If you have recently moved the data files, try moving them back. If the

files are where they should be, try repairing the databases that seem relevant to the error message. See the repair operations area in this manual, starting on page 68.

**Cannot install Simon on a system with Access 2000 installed.** Since Access 2000, and really Office 2000 for that matter, is becoming much more prevalent, I thought it might be a good idea to outline problems that might arise because of this type of installation. Simon, and all of the other programs in our Suite are Access 97 applications. And, the fact that Microsoft cannot seem to keep themselves straight on how things should be done to keep legacy software running, this issue is of great concern to use. Honestly, Access 97 is a better developer's platform and thus working out these issues is for everyone's benefit.

If you have Office 2000 installed on your computer in the default folders that they suggest, Office 2000 will overwrite your Office 97 applications, or at least, give our runtime program a faulty msaccess.exe file to attach itself to.

Our programs are setup as Microsoft runtime programs what will use resources that are already available on your system if at all possible. If you have Access 2000 on your machine, our programs will reference the msaccess.exe file from Access 2000 to run our programs, which, since ours are Access 97 programs, will not work. There is also an issue with the hatten.ttf file and the fact that you may not have license to use it in our programs.

If you have a problem getting our programs to install and work for you, you should delete the simon folder, or any of our other folders and then follow the below directions carefully.

1. Find the msaccess.exe and hatten.ttf files using Find Files and Folders and rename them to something other than their present names. This is done temporarily so that our install program will not find them and thus will avoid the problems that occur when Access 2000 resides on your computer before installing our programs.
2. Install the programs from our program suite that you want on your system.
3. Rename the msaccess.exe and hatten.ttf files to their former state.

This should do it. If this does not work for you, you should call us to get this straightened out.

**Why is it that I have to set up all of my mailboxes within Simon before I can add boxholders to the system? My old software didn't require this.** We could have written Simon to just build your boxes as you added new people to the system, but we had a different plan in mind. First, you would not be able to tell at a glance how many vacant boxes you have without knowing how many boxes exist. Also, we wanted Simon to be able to audit the number of keys you have available for each box, or the combination that you will assign to a box. And, with the box builder tool, we have created a way to add or create your boxes painlessly. Just like a lot of what we have done with Simon, we did discuss alternatives before continuing up the garden path.

**Other Problems.** Any problems we don't know about will not be addressed here. Some problems that we have found have been fixed. You should check our Web site to make sure that

you have patched all of the problems that we are aware of. If you are up to date with everything, you should let us know of the problem you are having because we probably are unaware of it, or it is too complicated to add here and will require a call from you to us to work through the difficulty.



## Chapter Eleven: Frequently Asked Questions

What can I say, the reason there are so few FAQs here, and the reason the troubleshooting section is so bare, is that there are few things that are not already available and easy to use with Simon. Be this as it may, I will try to add a few things here that I have been asked about.

**Question: I have a boxholder that I charge the medium price for his small box due to the large amount of mail he receives. Is there a way to charge extra without changing his box to a medium box?**

Answer: As of revision 1.53, you are able to set the prices for mailbox rental for each and every boxholder any way you want to. You can do this as you add a new boxholder using the Simon Helper, or you can change the rates anytime you want later on.

If, however, you have a version prior to revision 1.52, you can change the mailbox size by going to the Diagnostics Area for the boxholder in question.

**Question: I have a boxholder who opened a box on Tuesday and closed it on Wednesday and I would prefer to purge said boxholder from the system rather than having them show up as a closed box on the Postal Quarterly Report. How can I do this?**

Answer: This is an instance where we did not build a specialized Simon Helper to do the task for you automatically. In order to do this, you should go to the Fully Serviceable Data Area within the Diagnostic Area from Maintenance in the Simon Helper. You should find the client in the Boxholders area. Write down the Customer ID. It will be a number that will float along with all of the data belonging to this boxholder, as explained in the Chapter entitled Boxholder Data Structure starting on page 52. After you have noted the Customer ID, click on the grey bar along the left edge of the Boxholders window. It should turn darker grey. Hit the Delete key and delete this boxholder. Close the Boxholder form. If this boxholder had forwarding orders, this information will have to be deleted as well using the Customer ID as a guide to which entries to delete. After this is done, click on the Box Information button on the button bar (aqua button with 1s and 0s on it), find the box that this boxholder occupied, set it back to Vacant. This will have purged this boxholder, all of his or her information and has set the box back to being vacant.

**Question: I have a boxholder who does not show up as having a rent due date in the system. What can be wrong here?**

Answer: It happens. The remedy is fairly straight forward. Let me first explain the problem. As a person's history grows within Simon he or she will probably have many rent due dates that have come and gone. Simon keeps track of all of these due dates by posting a message to each boxholder's history, *i.e.*, DUE: Mailbox rent." Simon also keeps track of the dates payments were made.

When rent is paid on a box, the most current due item in history is "checked" as having been paid and then a new listing in history is made with the next due date listed based on the number of months the boxholder has just paid for. The problem here is that there is no "unchecked" history item stating rent is due for this boxholder.

The easiest way to fix this problem is to click on the second button from the left (it looks like a gold mailbox), navigate to the boxholder in question and then open the history tab control on the page. You should then, using the combo box at the top of the history tab control, list all history items (not just the current history items), choose Mailbox Rental History from the drop-down list. What you are looking for is the rent due item for the date you

Date	Description	Rent	Dep	Forw +	Forw -
1/26/2000	FUNDS: Key deposit forfeiture.	\$5.00	(\$5.00)	\$0.00	\$0.00
1/26/2000	REFUND: Key deposit.	\$0.00	(\$5.00)	\$0.00	\$0.00
1/26/2000	CLOSED: With key return.	\$0.00	\$0.00	\$0.00	\$0.00
2/24/2000	DUE: Mailbox rent.	\$0.00	\$0.00	\$0.00	\$0.00
5/1/2000	FUNDS: Late Charge.	\$10.00	\$0.00	\$0.00	\$0.00
5/1/2000	RENEWAL: 3 months.	\$20.00	\$0.00	\$0.00	\$0.00
5/24/2000	DUE: Mailbox rent.	\$0.00	\$0.00	\$0.00	\$0.00
* 5/3/2000		\$0.00	\$0.00	\$0.00	\$0.00

**Total Rentals, Deposits and Forward** \$0.00

**Figure 47:** As you can see, previous “DUE: Mailbox rent.” statements are checked and the one most current is unchecked. Every boxholder should have one unchecked due date message with all other due date messages checked. The same holds true for mail forwarding due messages..

think the rent should be due. If it is there, it is most likely “checked” as being paid. The check box right next to the history description is the correct check box. If you hover the mouse pointer over each check box, you will see a message indicating its purpose.

Now, if there is no unchecked mailbox rent due items in the list and no mailbox rent due item specifying the date when rent is due, you will have to create one by putting the cursor in the date box for the next available blank item and adding the date when mailbox rent is due and adding “DUE: Mailbox rent.” from the list of available descriptions. The list can be seen by clicking on the small down arrow button at the end of the blank description line.

Another problem very similar to this one can occur. This problem manifests itself as more than one listing for a particular boxholder in the Make Rental Payment item. In this case there may be more than one “DUE: Mailbox rent.” item that is unchecked. There should only be one unchecked item, but there must be one.

As an aside, if you want to delete an item from the history that is erroneous, just click on the small grey rectangle next to the history item in question (it should turn dark grey), and then hit the Delete key on your keyboard and answer Yes to the question about deleting it.

## Chapter Twelve: Diagnostics Area

To round out a wonder system, we knew that there had to be a way to work with those rare, extraordinary problems that surface now and then. Sure, the Simon Helper will get you through just about any situation, but what if things go awry. What if your data gets messed up due to a run time error right in the middle of a crucial process. It happens. The Diagnostic Area should be powerful and deep enough to help you fix any problem that might occur.

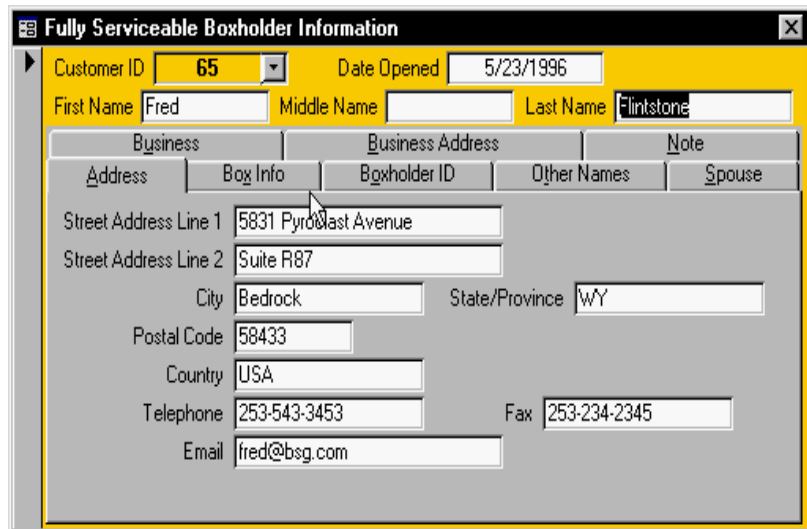
There is a warning that comes up before you enter this area. The point is that you should know what you are doing before trying to edit data from this area.

### Fully Serviceable Data Area

The fully serviceable data area can be used to rearrange data simply by attaching data where it should belong, instead of where it should not. From this area, you will also see some fields that you will not see anywhere else in Simon. For instance, in the History form you will see a full description of what certain check boxes mean when they are checked. If you are having problems with data, and you have called us for technical support, many times we will suggestion that we go to the Fully Serviceable Data Area to make an adjustment here or there to fix something that is not functioning properly.

For example, say that Fred Flintstone is showing up two or three times in the Forward Mail list under the Simon Helper. Chances are, there are two Forwarding Due items that are both unchecked. At all times, if a client is a mail forwarding client, he or she will have one, and only one, Forwarding Due statement that is unchecked. The ones that have a check mark by them denotes that this forwarding event has taken place and is no longer important, except as a record that this one was done.

If you need to check this situation, you should first go to the Customer form to find out what Customer ID Fred Flintstone has. Let's just say that he is Customer ID 65. Now you will want to close the Customer form and open the History form. Drop down the list under the term History ID to find listings for Customer 65 with "DUE: Mail Forwarding" as the description. The Forwarding Due statement that has the latest date is probably the one you want to leave intact. Check the one right before it (with the next latest date) to see if the check box with the label "This is used to note that a particular forwarding task has been accomplished" is unchecked. If it is unchecked, check it. See, **Figure 49**. Close the History form and go back to the Simon Helper to see if the dual listings are now just one. Should be fine now. Now what if there



The screenshot shows a software window titled "Fully Serviceable Boxholder Information". The form contains the following fields:

- Customer ID: 65 (dropdown menu)
- Date Opened: 5/23/1996
- First Name: Fred
- Middle Name: (empty)
- Last Name: Flintstone

Below these are several tabs: Business, Business Address, Note, Address, Box Info, Boxholder ID, Other Names, and Spouse. The "Business Address" tab is active, showing:

- Street Address Line 1: 5831 Pyroblast Avenue
- Street Address Line 2: Suite R87
- City: Bedrock
- State/Province: WY
- Postal Code: 58433
- Country: USA
- Telephone: 253-543-3453
- Fax: 253-234-2345
- Email: fred@bsg.com

**Figure 48:** Fred Flintstone is customer number 65.

were three? Then follow the same operation but check back to see which ones are not checked.

Why would Simon mess up on this. Well, it shouldn't, but if a forwarding operation is interrupted before completion by a run time error, then the operation may not have finished to the point where the check mark is placed in the box.

From this scenario we can make an assumption about how Simon determines what is placed on the list of when forwarding is due for any particular client. First they must have a forwarding due item in the history and it should be unchecked. If there are more than one unchecked, then we will have two listings. So, it chooses the listing based on unchecked forwarding due items.

So, if a forwarding client does not show up on the list at all. Then, it follows, that there are no forwarding due history lines that are unchecked. You will have to add one.

This holds true for mailbox rental due items as well. If they do not show up on the list as having rent due, but you know they are still an open client, then check to see if they have a mailbox rent due line that is unchecked.

What if you add an occupant to Joe Barnes' mailbox, but this person does not show up under Joe Barnes. Go to the Customer form within the Diagnostics Area and find out what Customer ID Joe Barnes is. He is 342. Close the Customer form and open the Occupant form. Drop down the listing under the Occupant ID. See if this lost person is listed there. If this person is there then bring up his or her record. Check the Customer ID. Is it 342? I suspect not! In fact, I know it isn't. Change it to 342. Now this occupant is listed under Joe Barnes. If it had another Customer ID attached to it, it was probably listed under some other client.

Now that wasn't too bad!

Sometimes the problems that arise are more confusing than this, and the problems outlined above are probably a bit confusing to you, just not to me. Hey, I wrote this program so little seems that confusing to me.

The screenshot shows a window titled "Fully Serviceable History". It contains the following fields and checkboxes:

- History ID: 1236
- Customer ID: 65
- Date: 12/22/01
- Description: DUE: Mail forwarding.
- Has notice been given that their box is due?
- When? [ ]
- Has a past due notice been given that their box is due?
- When? [ ]
- Invoice Number: 0
- Invoice Subject: [ ]
- This is used to note that a particular rent due bill was paid.
- Rent Amount: \$0.00
- Deposit Amount: \$0.00
- This is used to note that a particular forwarding task has been accomplished.
- Forwarding Income: \$0.00
- Forwarding Cost: \$0.00
- Is this item tax?
- Tax Code: [ ]
- Tax Rate: [ ]

**Figure 49:** One of the errant history items shows that DUE: Mail Forwarding is unchecked even though it was accomplished with a DUE: Mail Forwarding listing later on in the month that is also unchecked.

## Synchronization Problems

I can pretty much say ignore this area entirely. I doubt that data will ever get out of sync again.

When we first introduced Simon, we had determined that data could not get out of sync, but we added this tool just in case it should happen. Several of those using the initial version had synchronization problems so we wrote code to resync each and every time a new boxholder is added. Since then, sync problems have not appeared at all.

What is a synchronization problem, you might ask. A bit complicated, but I will try to explain. Data is not added to Simon until you click on the Finalize button at the end of a Simon Helper operation. For instance, when you make a payment, nothing is added to the actual boxholder's history until you click on Finalize on the last step of this Simon Helper operation. We did this so that if you had to abort an operation before you finished, you would not have to go clean up the mess of data that was added prematurely. This is called transaction processing. Transaction processing is actually the very best way of handling these types of operations, but it does create a whole new level of complexity to a program.

A scenario based on making a payment, however, would not cause synchronization problems at all. It is a fairly innocuous routine that can easily be completed or aborted without much ado, since the boxholder has been assigned an ID long before we ever got to the point of adding a payment, and this synchronizing ID will not be changed anywhere within Simon, not even at the closing of a person's box.

The problem lies with adding a new boxholder or hold situation. This is where a new boxholder is added to the system, and given an ID number.

All new boxholder information, history, forwarding orders, occupant information is added when the Finalize button is pushed and the occupant, forwarding and history has to synchronize to the boxholder information that does not, as of yet, have a Customer ID assigned to it. Problem. How does this number get assigned and all items in all those nasty tables get synced up. Well, a number has to be arranged for in the customer table and then all of the other data has to be told that this number is the number to use.

This was not done very cleverly in the first release, but the problem has been fixed.

As mentioned above, the synchronization area is really not necessary anymore, but the Fully Serviceable Data Area is very valuable.



## Chapter Thirteen: Package Only Services

When setting up your mailboxes initially, or if you want to add mailboxes later down the road, you do have a choice for a “P” type box. These “P” type boxes are for a unique package only delivery service that you can provide your customers. This package only delivery service will do a quasi 1583 that you should not give to the Postal Service since you will not be offering mail delivery services from the Post Office, only UPS and FedEx and other carrier delivery.

The reason this package service might be something to try is the fact that some people only want to use your services for an infrequent delivery to them of packages. No postal services can be accepted, though. If they will need postal services as well, a regular mailbox will have to be used and regular fees charged, since the all important postal forms are required.

The package delivery service does not require this postal intervention, since no postal deliveries will be accepted for this customer.

The paperwork is very much similar with that provided to the Post Office, but this is done for your protection, not to have the Postal Service interfering with your business.



## Chapter Fourteen: Boxholder Builder

Fitting that one of the first tools you may use with Simon is saved as the last chapter in this manual. Of course, reference has been made throughout this Manual about this tool, but it did deserve further mention in its own chapter after the completion of upgrades to it in revision 1.54.

If you were familiar with this tool prior to revision 1.54, you will notice that it now does everything for you as far as setting a box up with the proper status. In fact, it will close a box, store it in archive and not set the box number that it once used as occupied. This is a far better tool than it once was.

**Figure 50:** The new improved Boxholder Builder will make introducing all of your closed and present boxholders to Simon a snap.

The following is a listing of what is found on the Boxholder Builder form, what is required, what is optional, and how changes are made.

**Boxholder.** When you open and Boxholder Builder and when adding a new boxholder with the Boxholder Builder, your cursor will start in the first box at the top. This is where you should add the boxholder's first name. The next box is for the middle name and the last box is for the last name. Only the first and last names are required. Middle name is optional.

**Telephone.** The older Boxholder Builder manifestations required a telephone number. After revision 1.54, it is no longer necessary.

**Boxholder Status.** There are six choice in the boxholder status area. These are the same six choices you have when adding a new boxholder using the Simon Helper tools, *i.e.*, setting up a new mailbox rental client or mail forwarding client, holding a box for someone, or closing a box. A choice here is required and different things will happen depending on your choices here. For instance, if you choose Closed Box–No Key Return, a box will appear that

**Figure 51:** Closing a box will require adding the date the box was closed and the next due date is disabled because it is not germane to the process.

requires the date that the box was officially closed. You must add a date here or you will not be able to complete the operation. Notice that the More button does not become available

until all of the appropriate boxes on this form are filled out. And, the appropriate boxes change depending on the operation you are doing, and the type of box you are working with. You will also notice that, when closing a box, the Next Due Date box is no longer necessary. See **Figure 51**. If you are working through the Boxholder Builder and it seems like you just cannot get the More button to become enabled, there must be some important piece of information you are not giving to Simon. For instance, if you do not give a close date on a box, how can Simon close it, if you do not give a next due date, how can Simon set up a box. In the latter case, Simon must know when to set a history item stating when the next due date is. Without this information, this box will not ever be billed for rents.

**Box Number.** Depending on the type of box you are working with, certain things will happen. If it is a keyed box, the box size, number of keys given and the key number will appear. You needn't adding any key information into the system, but if you are keeping records on the number of keys given to the boxholder, it would be a good idea to add this here. If the box has a combination lock, the box size, combination boxes and the randomizer will appear instead. You need to enter the combination for the box in the boxes provided. Also, the prices will appear in the Quoted Rent Fees area. This is editable in case you charged differently from the default prices in Simon. See the long and narrow grey button below the rent fees, this will reset what you have entered in the rent fees area back to the defaults.

**Date Opened and Next Due Date.** As mentioned above, the Next Due Date is not always necessary, but the Date Opened is always required.

**More...** This button will take you to a page containing all information about the boxholder that does not appear on this page. This is specifically for adding more information in the event you are opening a box with mail forwarding, which does require additional information. You can also use this area to add more information about this rental if you choose to do so. This button will not become available until everything necessary is filled out on the main form as outlined above.

**Add Another Boxholder or Close.** This button will simple allow you to stop adding new people or go on to another. Of course, you will not be able to move on until you have successfully completed all of the required information on the form.

Date	Description	Rent	Dep	Forw +	Forw -
5/1/1998	OPEN: Unknown Duration.	\$0.00	\$0.00	\$0.00	\$0.00
12/13/1999	CLOSED: No key return.	\$0.00	\$0.00	\$0.00	\$0.00

**Total Rentals, Deposits and Forwarding:** \$0.00 \$0.00 \$0.00 \$0.00

**History edits cannot be made on this Box Builder form. The reason for this is that the history information here is too fluid to be changed. Your changes may not take effect, so we wouldn't want you to waste your time trying to edit what may not survive. If you need to edit the history later, do so from the Simon Helper, or the Boxholder Information form.**

**Figure 52:** Similar to the Boxholder Information form as far as the tabbed form, this will allow you to add more information about the subject of the Boxholder Builder operation you are undertaking.

**The Question Mark.** This will take you to a help file that, maybe not so eloquently as this Manual, explains how the Boxholder Builder works.

**Where You Go When You Click More...** Always if you are adding a boxholder with mail forwarding, will you go to this form to at least add the mail forwarding Initial Deposit so you will be able to start working with Simon and have all of the deposit amounts in place correctly. Of course, history will not be added to Simon simulating all of the mail forwarding transaction done in the past. The Boxholder Builder will simply set the amounts present held for the client and you can start from there. For other Boxholder Builder operations, this area is optional. You can see that the box in **Figure 52** was opened on May 1, 1998 and the box was closed on December 13, 1999. Also notice that there is no page for mail forwarding shown here. This page is only available when the box is being opened with mail forwarding. After all information is completed on this page, you can click on back to go back to the main page.

If all is completed, you can click on Add Another Boxholder or Close to add another client or close the Boxholder Builder.



## Chapter Fifteen: Simon Specifications

I thought it might be a good idea to create a chapter for specifications on the Simon program, and will grow this chapter when we think of things that might be useful here. There are few limitations. The specifications are as follows:

Maximum number of boxes you can set up  
in Simon

Unlimited



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