

Details Plus™

From Solica Consulting

Making the GoldMine® Details tab really useful!

Details Plus is the **award winning*** add-on for GoldMine in use by thousands of GoldMine users. Details Plus extends the power of the Details tab in many ways, giving you

- Numeric and date fields
- Configurable screen layout and labels
- Stores data in standard GoldMine tables, no structure changes
- Five extra fields
- Fully sync aware
- Calculated fields
- Powerful search and query facilities
- Builds GoldMine groups from queries
- Merge detail data into Word documents and e-mails, either of single records or full multi-detail mail merges
- Inexpensive (about \$37 per GoldMine user licence)
- Easily installed in a few minutes
- **New. Automatic activation from GoldMine. Behaves as if it is part of GoldMine!**

The annotated screen shot below illustrates many of these features.

* Winner 2001 Best New GoldMine Integration, awarded by FrontRange Solutions Inc

Details Plus™

Details Plus runs alongside GoldMine providing all of the above functions, with a total of 4 extra normal fields (3 for GoldMine 4) and one extra notes field. Details Plus stores the extra data in fields in the Contsupp table not used for details. It dynamically refreshes from the current GoldMine record and uses the same lookup data. Details Plus is fully sync aware and works with GoldMine 4 standard, GoldMine 4 Enterprise, GoldMine 5 and GoldMine Front Office 2000 Sales and Marketing, though some features are not available in GoldMine 4.

Key Features

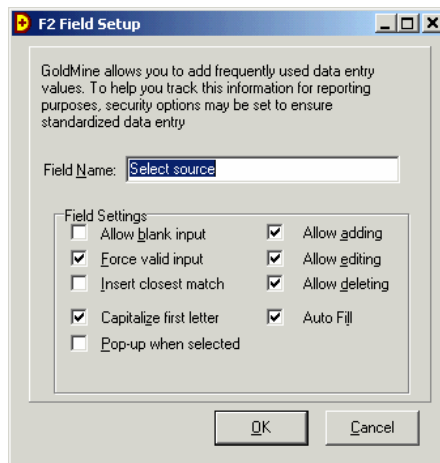
Details Plus has almost all the normal functionality you'd expect in GoldMine including Pop-up lookups, F2 pop-ups, lookup setup facilities and much more. Making changes to these settings in Details Plus is the same as changing them in GoldMine – the settings are still stored in GoldMine tables.

You can also set it up to give F2 lookups in Notes fields.



Source: Personal contact
 Price (\$): 49.90
 Payment method: Cheque
 Interests: Radio

Direct mail
Personal contact
 Referral
 Web site
 Lookup window...



F2 Field Setup

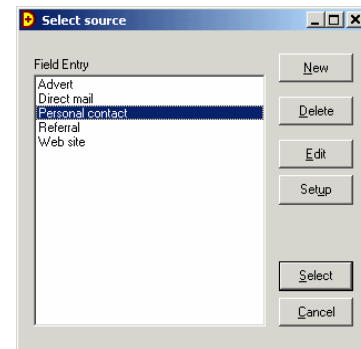
GoldMine allows you to add frequently used data entry values. To help you track this information for reporting purposes, security options may be set to ensure standardized data entry.

Field Name: Select source

Field Settings:

<input type="checkbox"/> Allow blank input	<input checked="" type="checkbox"/> Allow adding
<input checked="" type="checkbox"/> Force valid input	<input checked="" type="checkbox"/> Allow editing
<input type="checkbox"/> Insert closest match	<input checked="" type="checkbox"/> Allow deleting
<input checked="" type="checkbox"/> Capitalize first letter	<input checked="" type="checkbox"/> Auto Fill
<input type="checkbox"/> Pop-up when selected	

OK Cancel



Select source

Field Entry

- Advert
- Direct mail
- Personal contact**
- Referral
- Web site

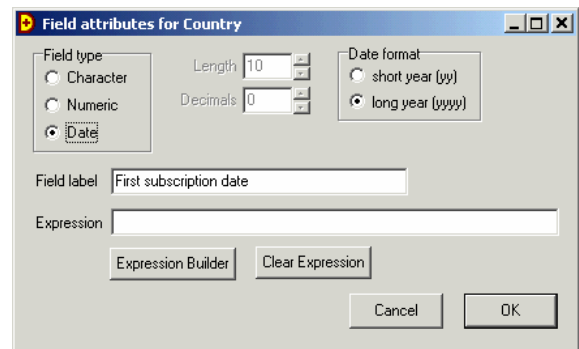
New
Delete
Edit
Setup
Select
Cancel

Details Plus allows field attributes to be sent in a layout mode accessible to master users only. Fields can be set to be of various lengths (up to the maximum permitted by the GoldMine field), and of type character, numeric or date.

In layout mode fields can be dragged to new locations, their labels and lookup-buttons automatically moving as well. Field widths can also be changed and field heights for notes fields.

The size of the Details Plus window can also be changed.

Each different Detail type can have a different layout, field attributes and window size, making a highly configurable system.



Field attributes for Country

Field type: Character Numeric Date

Length: 10
Decimals: 0

Date format: short year (yy) long year (yyyy)

Field label: First subscription date

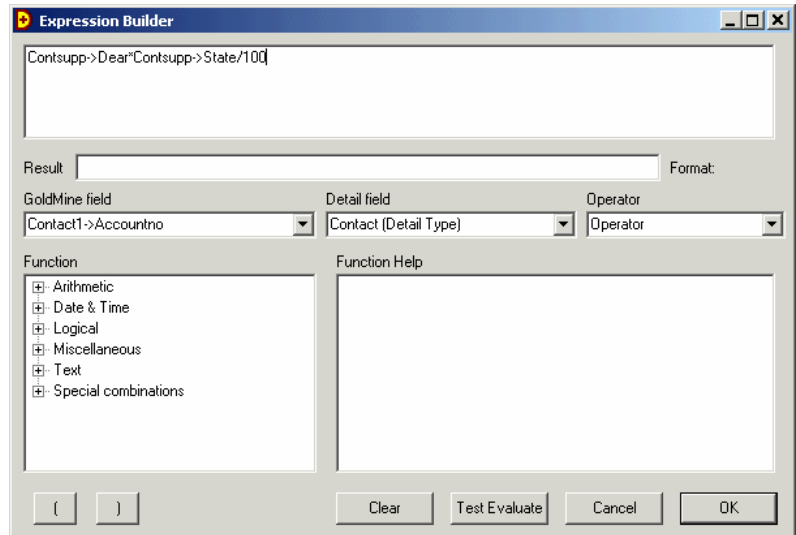
Expression:

Expression Builder Clear Expression

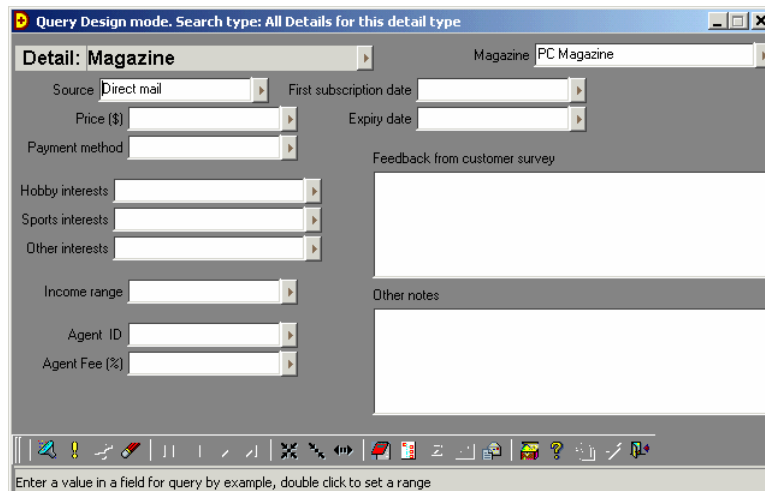
Cancel OK

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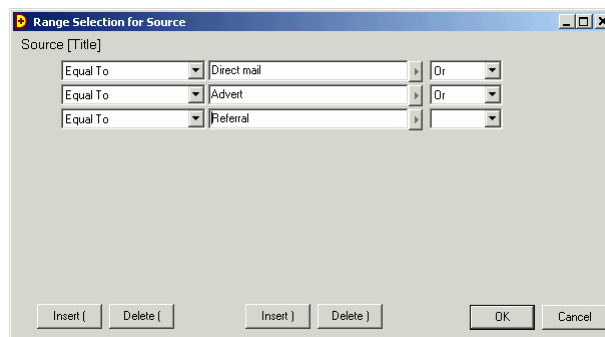
Calculated fields set up with the aid of an Expression builder allows field values to be automatically calculated whenever the Detail is viewed or changed



In Query Design mode, queries can be designed by simply entering the examples of the values you want to search for – in this example all Magazine details with reference 'PC Magazine' and Source of 'Direct mail'... are included



...or more sophisticated ranges can be specified – in this example subscription expiry between two dates

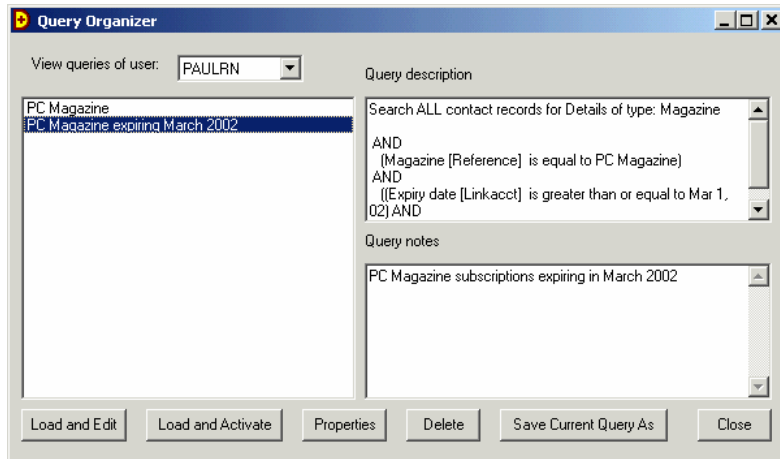


Once designed the query can be activated and the video buttons used to move to the next, previous first or last record. After each move, GoldMine is automatically positioned to show the particular contact and detail record.

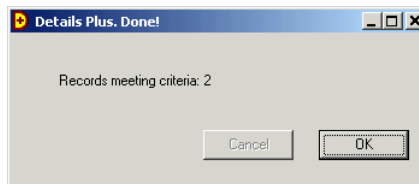


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Details Plus lets users store, load and edit queries, similar to Filters in GoldMine, using a new query management window

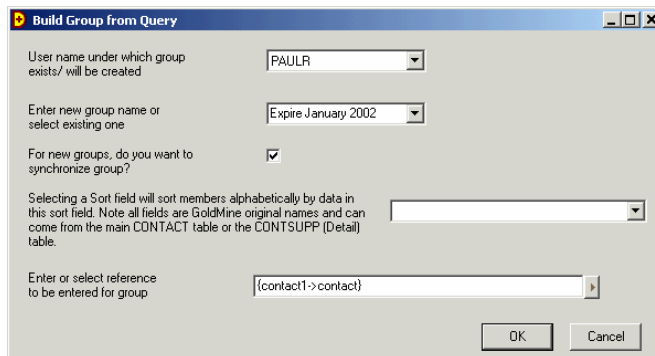


It is also easy to count records meeting the criteria – just click on the Count button and the number of records is counted.

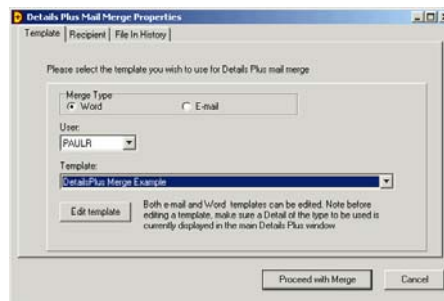


You can also build GoldMine groups from queries! Simply create and activate a Details Plus query, click the group icon, specify which group you want to create or add records to, then go. Details Plus scans records and builds a group *in GoldMine* which can immediately be used for mail merge, group schedule etc.

Added in response to many user requests, this feature is easy to use and adds a capability previously only possibly using unwieldy SQL queries.



Details Plus also lets you merge to both Word and e-mail, producing one document or e-mail per Detail which meets the query criteria! This takes three steps.



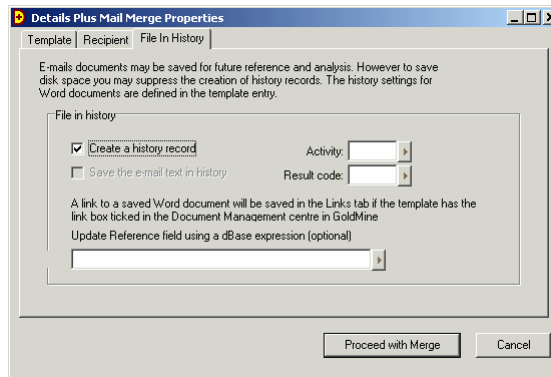
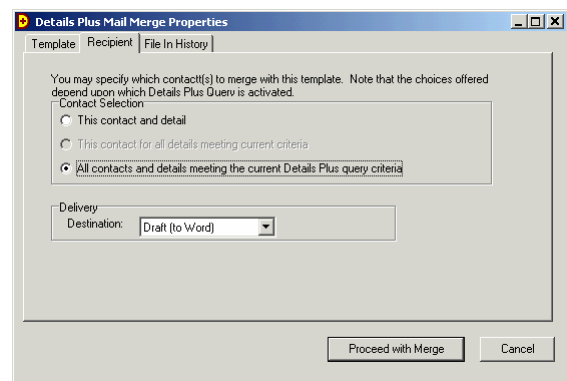
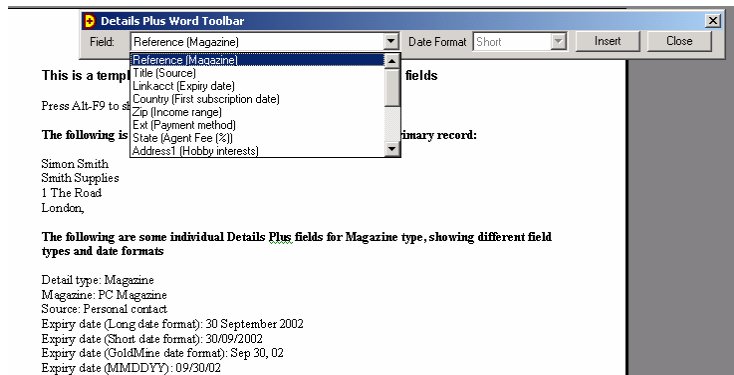
Details Plus™

To design a template in Word you edit the GoldMine Word template from Details Plus using the Edit template button. This brings up Word but adds a floating toolbar which lets you insert Details fields into the template which the Details Plus merge will recognise.

E-mails templates are designed in a similar way

The second step in a merge is to select the subset of data to whom you wish to send the e-mail. This can be a single detail record only, or all within a Details Plus query (which also takes into account any filters and/or groups active in GoldMine). The type of merge, the template to use and the subset to target are specified from within Details Plus.

The final step is to do the merge. As within GoldMine (though with a little more flexibility) you can specify whether you want history records, activity codes and result codes



Common Questions

Where does Details Plus hold the additional field data? These are stored in fields in the Contsupp table such as Dear, Fax, MergeCodes and (not for GoldMine 4) Address3. These fields are used for other types of Contsupp record such as additional contacts but are not used for GoldMine Details data. Details Plus accesses these using standard GoldMine procedures.

Where does Details Plus hold the lookup data for the additional fields? In the GoldMine Lookup table using the same conventions used for Fields 1 to 8 on the Info tab.

How does a user switch between the Details Plus window and GoldMine? Any normal Windows technique can be used, such as clicking on the program icon on the taskbar. The Alt-Tab combination is particularly useful as it allows users to switch between the two. Each time focus passes to the Details Plus window it checks the currently selected Detail and, if necessary, refreshes the data. Also in Details Plus, a button switches back to GoldMine. **New to 1.5.1, auto-activation can**



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be enabled. Bringing up the Detail editing window in GoldMine automatically closes it and switches to Details Plus. Clicking the close button in Details Plus switches back to GoldMine. Details Plus behaves like it is part of GoldMine!

Where is the field position, type and label data held? Details Plus uses a Windows settings/configuration file called by default DetailsPlus.ini which holds data such as field types and positions. A command line option allows other settings files to be selected.

Which versions of GoldMine are compatible with Details Plus? Details Plus works with GoldMine 4 (both Standard and Enterprise), GoldMine BCM 5.x and GoldMine Sales and Marketing (all versions). **New with version 1.2.10, Details Plus is officially certified by FrontRange Solutions Inc for GoldMine 5.x and GoldMine Sales and Marketing.** GoldMine versions 5.5.10424 and above are recommended. It will also work with GoldMine BCM6.

GoldMine 4 does not have full functionality in that e-mail merges are not available. Also in GoldMine 4 not all GoldMine security features may be respected by Details Plus.

Is Details Plus sync aware? Yes. All field and lookup data is stored in GoldMine tables and all changes automatically synced. The only file not automatically synced is the Details Plus settings file. If necessary, this can be linked into the InfoCenter so that it does sync.

Does Details Plus work on networks? Configuration to work on networks is easy. Just like GoldMine, Details Plus can be placed on a network drive and shared by all users. Some special setup options simplify network deployment.

What happens if a future version of GoldMine provides access to the currently unused fields or uses them for other purposes? Details Plus provides access to the additional fields in essentially exactly the same way as GoldMine accesses the current Info tab fields. If GoldMine is changed, it is likely to use the same methods for these new fields. It is possible that some changes could be required for Details Plus and in this case a new version, with data conversion utilities if required, will be released. We cannot, of course, guarantee that Details Plus will work with future versions of GoldMine, but given that the additional fields are used for functions such as additional contacts, it is unlikely that major changes will be made.

How can I evaluate Details Plus? Download an evaluation copy from the Solica web site at www.solica.com/details.htm.

Will Details Plus work with details shown in other tabs? Yes. In previous versions extended Detail tabs could be manually designated as part of the configuration. **New to 1.5.1 Extended Detail tabs are automatically detected.**

Will Details Plus run on laptops? Yes. Installation is easy using Details Plus install with various options such as auto-configuration and optional registration codes embedded in settings files designed to make it easier for the GoldMine reseller or administrator. Details Plus automatically obtains most parameters it needs from the running GoldMine. Support is also provided to help system administrators to develop special installation kits allowing pre-configured Details Plus to be installed with a simple batch file.

Will Details Plus deal with international versions of GoldMine? Yes, labels can be changed to most characters. However all standard fields and messages are currently in English. This may be changed in a future release

Licensing and Pricing

Details Plus is licensed in a similar way to GoldMine and normally the same number of licences must be purchased as the GoldMine licence. On a multi-site GoldMine system it is the total licence count at the central site which matters, but Details Plus can then be used at all sub-sites and undocked sites. The Details Plus unlock code enforces these restrictions, so if you are buying more GoldMine licences, contact Solica at the same time for a new licence code. Details Plus is also unlocked for one particular GoldMine master licence number only, though in the event that you change these we'll provide a new unlock code.

Some larger installations may require Details Plus to be run only at some sub-sites or undocked users. In this case special sub-site licences may be able to be purchased which will be cheaper, though less flexible than buying one overall licence. Please contact Solica for details.

Details Plus costs £24 (twenty-four pounds sterling) per user licence, which at current exchange rates is about \$37. Payment is required at time of order and is by credit card, so the billed amount will be converted to your local currency on your bill.

Details Plus™

For simplicity and given the low price, we do not discount on quantity, but a 200 user licence currently allows an unlimited numbers of users (so the maximum price is £4800 afterwards). For UK purchasers VAT is charged (and for EU users if a VAT number is not quoted).

Reseller terms are available to approved GoldMine resellers.

Licences can be purchased via faxed, telephone or written orders to Solica in the UK, quoting a valid MasterCard, Visa or American Express number, with the order form included in the evaluation kit. Please do not e-mail credit card numbers as we cannot currently accept these for security reasons.

New versions, but not necessarily new releases, will be produced and will be able to be downloaded from the web site. If substantial enhancements are made we may declare it a new release and reserve the right to charge an upgrade fee, but this is not expected to occur.

Evaluation

You can download a free evaluation copy of Details Plus at www.solica.com. This will work on any GoldMine system and PC for 10 days and is fully functional. It can be converted to a full version by simply purchasing an unlock code – the evaluation and full version software are the same.

Ordering

The Details Plus evaluation contains an order form, accessible via Start |Program Files|Details Plus or in file order.txt. There is also a downloadable order form on our web site. Simply fill this out, giving details of your GoldMine licence number and a credit card, then fax to our offices. We'll e-mail you an unlock code and mail you a receipt. Order from your GoldMine reseller or from Solica directly.

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