www.clew-consulting.com
Email: sales@clew-consulting.com
Download at www.clew-consulting.com

Details Plus™/Details Plus 2™

Making the GoldMine® Details tab really useful!

Details Plus is the GoldMine standard add-on for anyone who uses GoldMine Details and is in use by tens of thousands of GoldMine users. Details Plus extends the power of the Details tab in many ways, giving you.

- Numeric, date and contact type fields
- Configurable screen layout and labels
- Stores data in standard GoldMine tables, no structure changes

- Five extra fields

- Default values
- Details Plus (original) works with older versions of GoldMine 4, 5, 6 and 7 as well as GoldMine Premium Edition 8.0.
- 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 (£24, about $39) per GoldMine user licence for Details Plus, (£30 about $48) for Details Plus 2
- Global edits
- Exports to common file formats

- Easily installed in a few minutes
- Automatic activation from GoldMine. Behaves as if it is part of GoldMine!

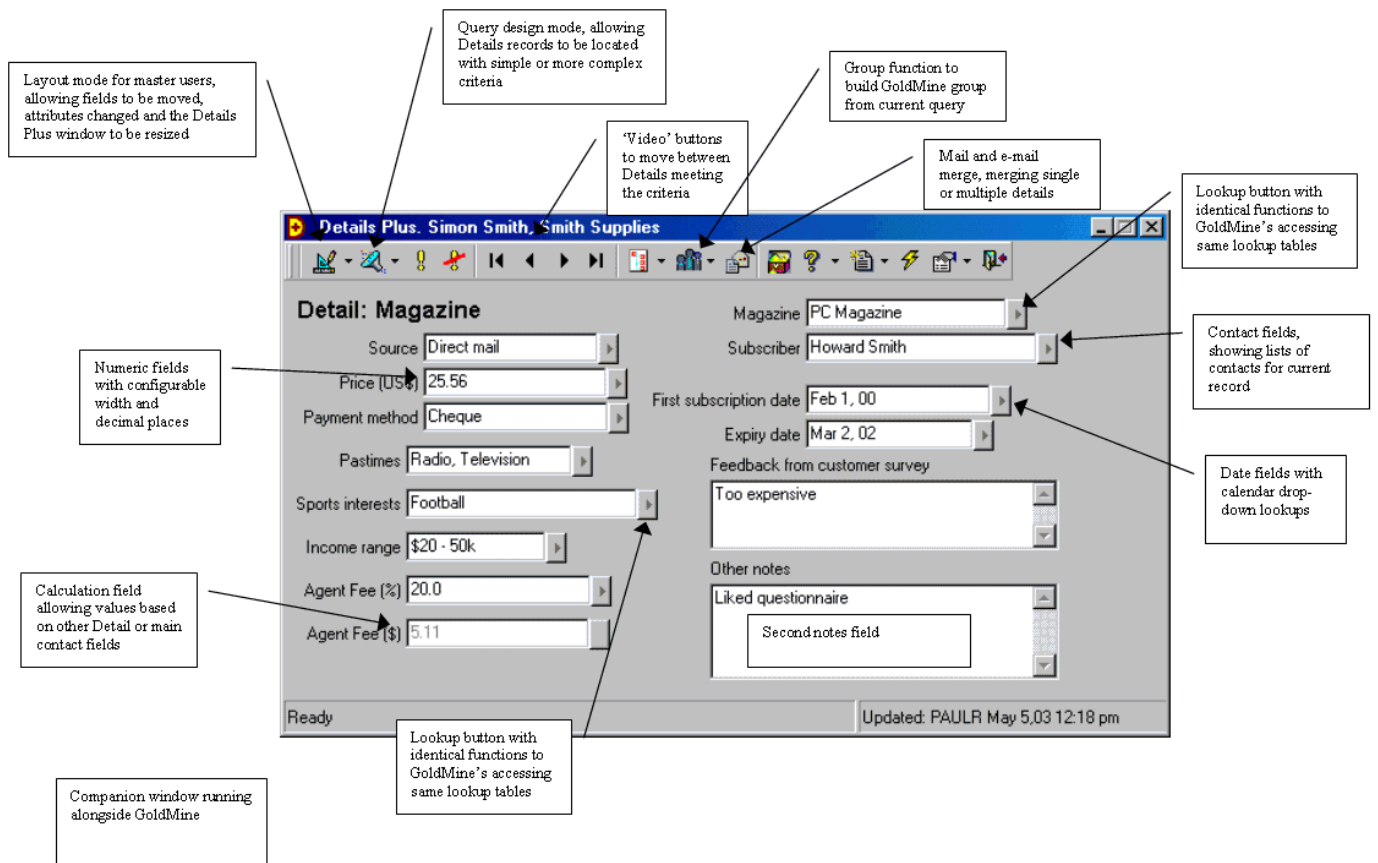**Details Plus 2** gives you all of the above with the following enhancements:

- Works only with GoldMine 6.7, GoldMine 7.x and GoldMine Premium edition (8.x and 9.x), GoldMine 2013, GoldMine 2014 and GoldMine 2015
- Uses newer COM interface instead of older Borland Database Engine or classic API – faster and simpler

- Runs as a plug-in in GoldMine 7.5 and Premium Edition and starts automatically

- Vista, Windows 7 and Office 2007, Office 2010 and Office 2013 compatible

The original Details Plus is now only available for existing sites which need new licences. All new sites should use Details Plus 2.

Details Plus was developed by Paul Redstone at Solica Consulting. In 2011 the CRM business was sold to Serversys and Solica clients transferred but in October 2012 Clew Consulting (owned by Paul Redstone) purchased the rights to Details Plus and other Solica Consulting add-ons from Serversys. Clew Consulting now provides support and new licence sales.

Details Plus™

The screenshot below shows Details Plus running as a separate program. Details Plus 2 can also run in this way.

Query design mode, allowing Details records to be located with simple or more complex criteria

Layout mode for master users, allowing fields to be moved, attributes changed and the Details Plus window to be resized

Group function to build GoldMine group from current query

'Video' buttons to move between Details meeting the criteria

Mail and e-mail merge, merging single or multiple details

Lookup button with identical functions to GoldMine's accessing same lookup tables

Numeric fields with configurable width and decimal places

Contact fields, showing lists of contacts for current record

Date fields with calendar drop-down lookups

Calculation field allowing values based on other Detail or main contact fields

Lookup button with identical functions to GoldMine's accessing same lookup tables

Companion window running alongside GoldMine

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/enterprise), GoldMine 5 (dBase and SQL), GoldMine 6 Business Contact Manager, both standard and corporate edition and GoldMine 7 (on MSSQL and Firebird). Some features are not available in GoldMine 4.

Details Plus 2 can also run as a plugin within GoldMine Premium Edition and 7.5. It can also run as a plugin in GoldMine 7 but some limitations in the GoldMine API for this version cause issues with autoactivation.

Details Plus™

The screen below shows an example of a plugin-running in GoldMine Premium Edition:

Details Plus™

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.

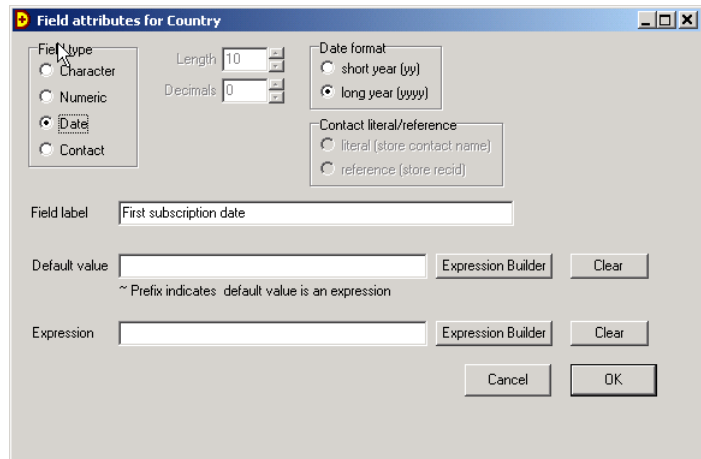You can also set it up to give F2 lookups in Notes fields.

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 or contact.

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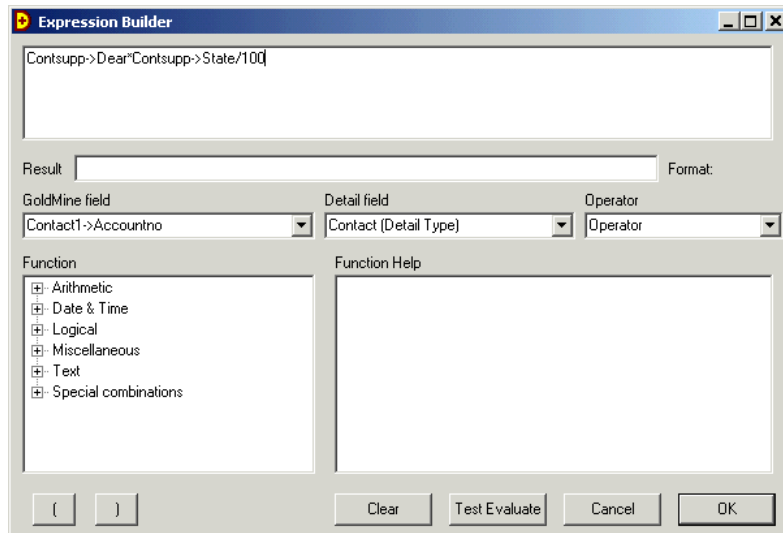
The size of the Details Plus window can also be changed.

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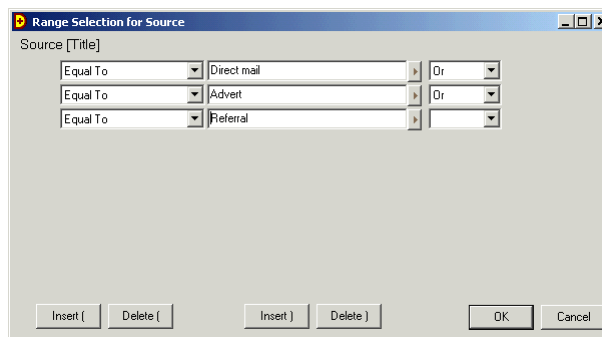
Details Plus™

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
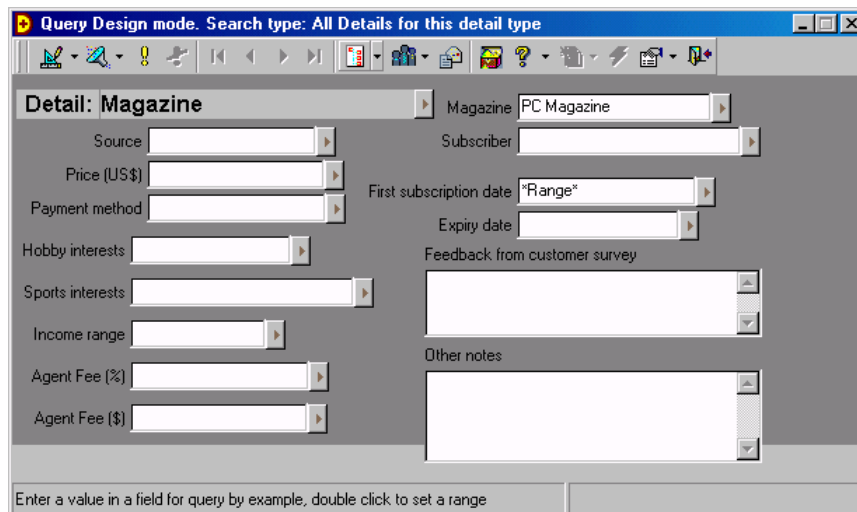
…or more sophisticated ranges can be specified – in this example subscription expiry between two dates
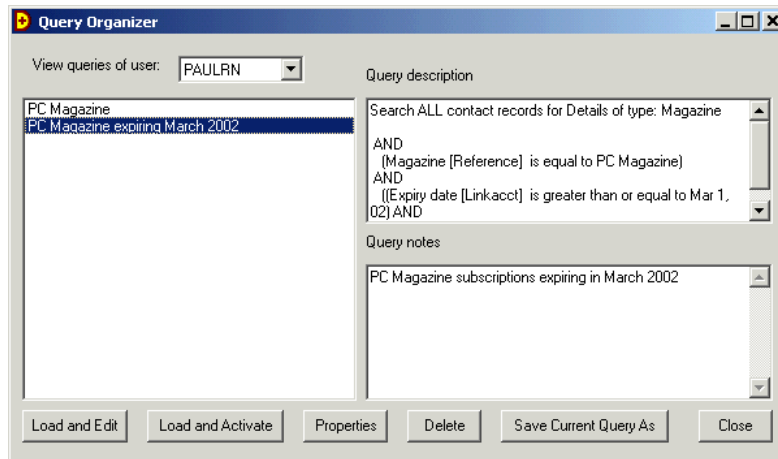
Once designed the query can be activated and the video buttons used to move to the next, previous first or last record. After each move, GoldMine is automatically positioned to show the particular contact and detail record.
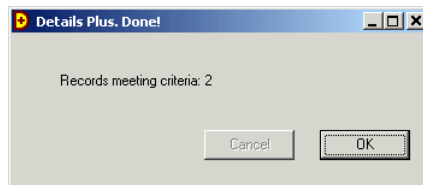
Details Plus™

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.
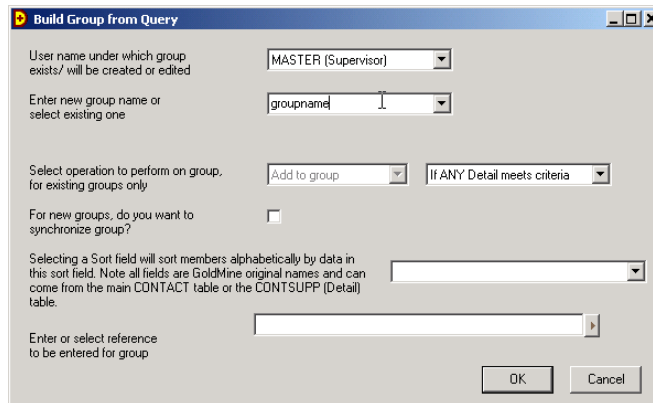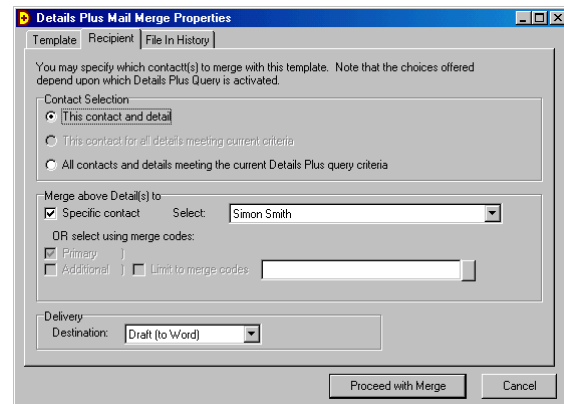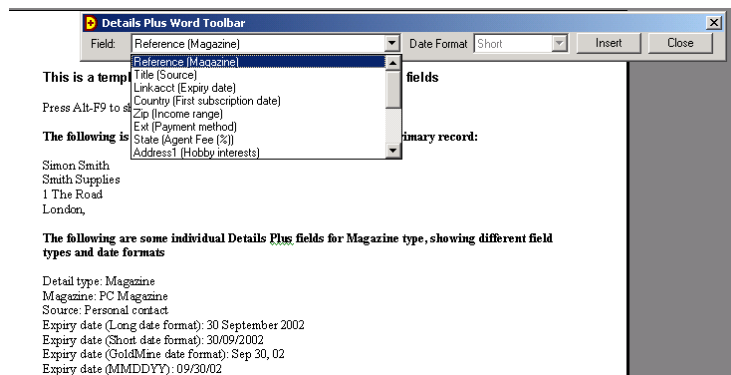
Details Plus™

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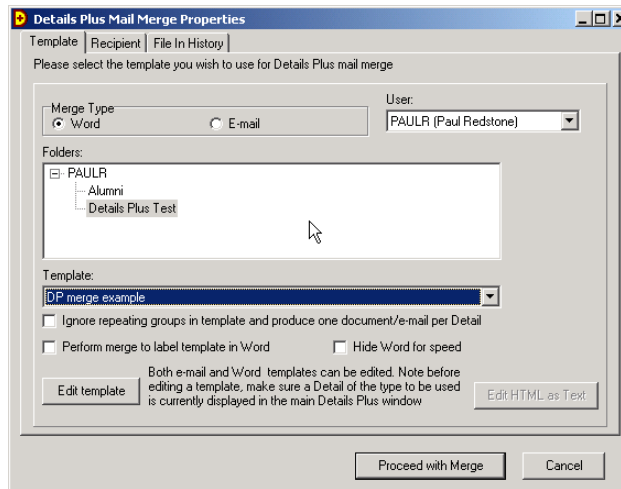
To design a template in Word you edit the GoldMine Word template from Details Plus using the Edit template button. This brings up Word but adds a floating toolbar which lets you insert Details fields into the template which the Details Plus merge will recognise.

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.

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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
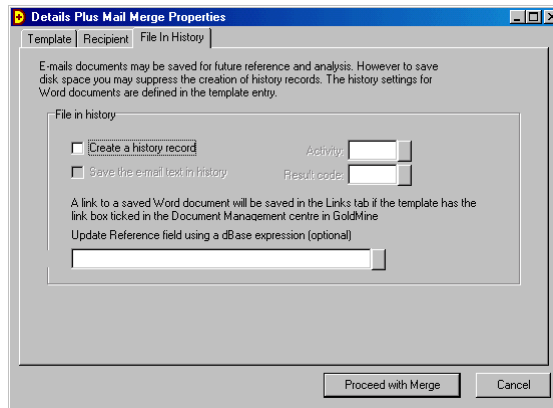
Editions

Details Plus is available in two versions: the original Details Plus and Details Plus 2 which has extra features. The differences are shown below.

Details Plus	Details Plus 2
Runs as separate executable only	Separate executable and (on GoldMine 7.5 and Premium Edition) as a plug-in.
Works with GoldMine 4,5,6 and 7 using older API/Borland Database engine	Runs with GoldMine 6.7 and above using COM interface
Only available for existing sites which already use it and need additional licences	Plug-in works within GoldMine itself with tighter integration, better autoactivation

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. Also auto-activation can 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! Details Plus can also be set to minimise to the System tray instead of the taskbar.

Details Plus 2 is more tightly integrated and is a separate tab or window within GoldMine, depending on whether GoldMine is running an tabbed mode (GoldMine Premium Edition only) or MDI mode.

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.

Details Plus™

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) and all versions of GoldMine Business Contact Manager 6 and 6.5 as well as GoldMine 7 and GoldMine Premium Edition 8.0, on both Firebird and MSSQL database platforms. When running with GoldMine 4, Details Plus 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. **Note that Details Plus 1 does not support lookups in extended fields properly in GoldMine 8.5 and will not run at all with GoldMine 9.0**

Details Plus 2 only runs on GoldMine 6.7, 7.x, Premium, GoldMine 2013, GoldMine 2014 and GoldMine 2015. It will only run as a plugin in GoldMine 7.5 and Premium. **Note that it cannot run as a plug-in with GoldMine 7.0 due to an issue with the GoldMine API.**

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.

How can I evaluate Details Plus? Download an evaluation copy from the Clew Consulting web site. This is fully functional but has regular warning messages.

Will Details Plus work with details shown in other tabs? Yes. 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 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 Clew Consulting 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 Clew Consulting for details.

Details Plus costs £24 (twenty-four pounds sterling) per user licence, which at current exchange rates is about $39. 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 2 costs £30 (thirty pounds sterling) per user licence which at current exchange rates is about $48. A Details Plus 2 licence will also work with Details Plus though there is normally no point in running the latter (unless you are running with a version of GoldMine prior to GoldMine 6.7).

Upgrades from Details Plus to Details Plus 2 are available at £6 (about $10) per user licence.

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. 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 e-mail to Clew Consulting in the UK.

Details Plus™

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.

Support

New versions and releases are currently free and expected to remain so, as with most of our other add-ons. E-mail support is also currently free and expected to remain so – simply e-mail support@clew-consulting.com. Telephone and remote support is now not free but is paid for on a per-incident basis. Please see our web site for details.

Evaluation

You can download a free evaluation copy of Details Plus at www.clew-consulting.com. This will work on any GoldMine system and PC and is fully functional but has warning messages which pop up to remind you to register. 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 Details Plus 2) or in file Order Form.doc. There is also a downloadable order form on our web site. Simply fill this out, giving details of your GoldMine licence number then e-mail to us. A PayPal invoice will be e-mailed to you. Once payment is made we'll e-mail you an unlock code and mail you a receipt. Order from your GoldMine reseller or from Clew-Consulting directly.