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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 2 works with GoldMine 6.7, GoldMine 7.x and all versions of GoldMine Premium edition including 8.x, 9.x, 2013 and all later versions up to at least GoldMine 2019 and probably later versions.
- Runs as a plug-in in GoldMine 7.5 and GoldMine Premium Edition and starts automatically
- 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
- **Now free**
- 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!

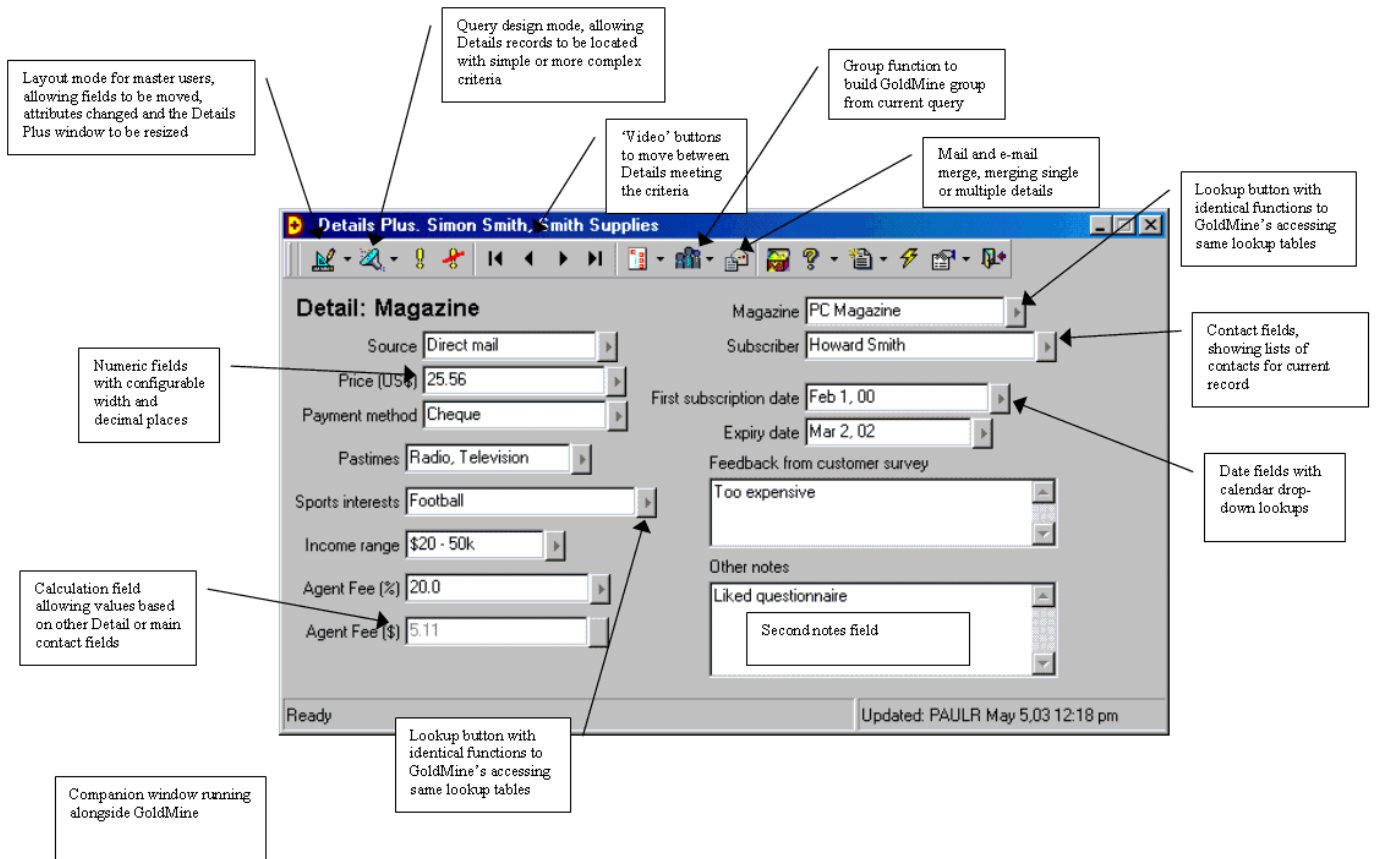
Details Plus 2 was first released in 2008 and superseded Details Plus 1. Details Plus 1 is now only available when existing users need to purchase additional licences.

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™

Details Plus 2 can run as a separate executable but when running on GoldMine 7.5 or all version of GoldMine Premium Edition can also run as a plugin. In this mode it normally starts automatically when GoldMine is run and is manifest as a tab within GoldMine. The screen layout is the same for both versions.

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



Details Plus 2 runs alongside GoldMine providing all of the above functions, with a total of 4 extra normal fields and one extra notes field. Details Plus 2 stores the extra data in existing fields in the CONTSUPP table which are not used by GoldMine for detail records. It dynamically refreshes from the current GoldMine record and uses the same lookup data. Details Plus is fully sync aware.



Details Plus™

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

The screenshot shows the GoldMine Premium Edition interface with the Details Plus plugin running. The main window displays the contact details for Sarah Smith, with the Details Plus plugin showing a magazine subscription record. The interface includes a menu bar (File, Edit, Go To, Tools, Actions, Schedule, Complete, Web, Window, Help) and a toolbar with various icons. The contact name 'Sarah Smith' is visible in the top navigation bar. The Details Plus plugin displays the following information:

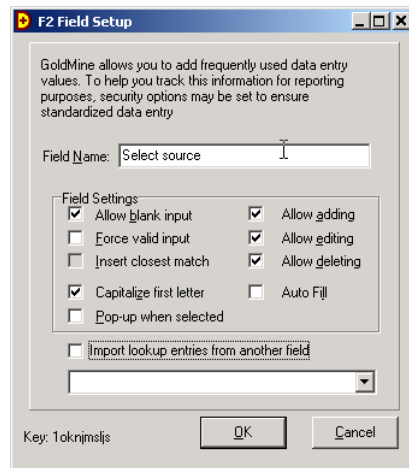
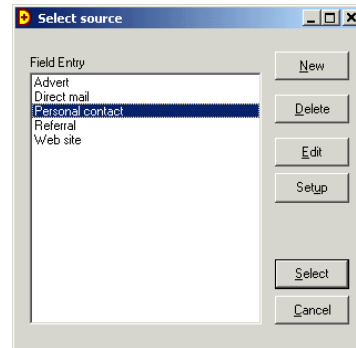
Detail: Magazine	
Magazine	PC/Computing
Source	Web
Subscriber	Simon Smith
Price (US\$)	60.00
Payment method	Credit
First subscription date	Apr 28, 07
Expiry date	Apr 26, 08
Hobby interests	Stamp collecting
Sports interests	Soccer
Income range	30-50\$K
Agent Fee (%)	9.3
Agent Fee (\$)	5.58
Feedback from customer survey	Likes magazine, would like earlier delivery
Other notes	

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.

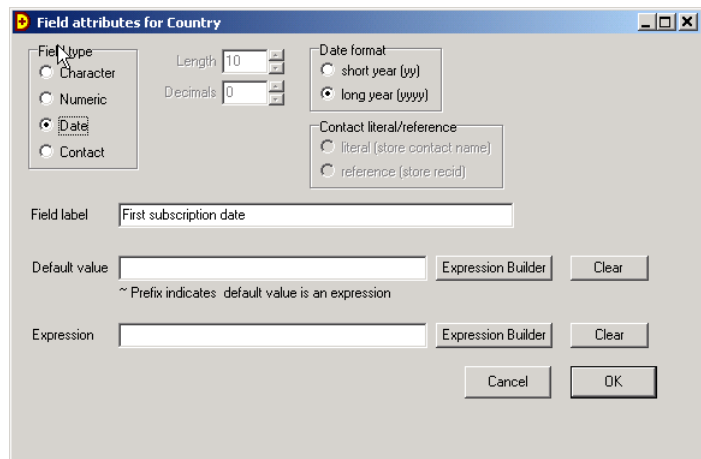




Details Plus allows field attributes to be sent in a layout mode accessible to master users only. Fields can be set to be of various lengths (up to the maximum permitted by the GoldMine field), and of type character, numeric or date or contact.

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.

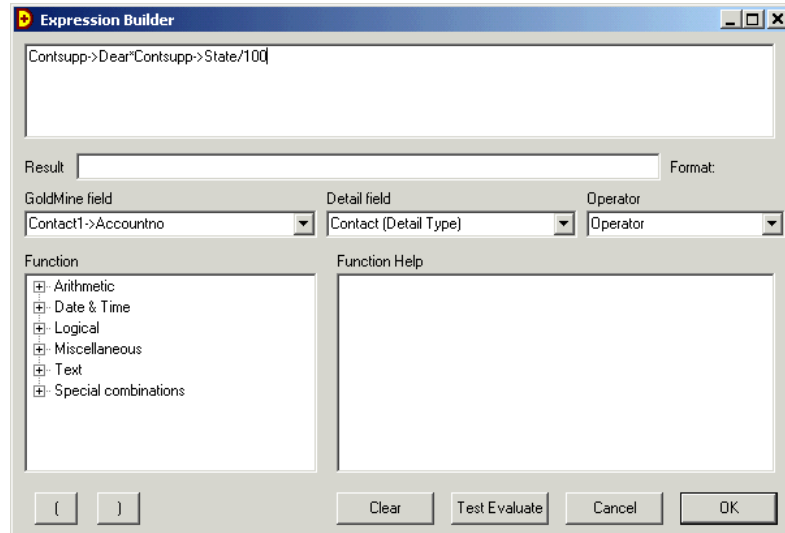
The size of the Details Plus window can also be changed.

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

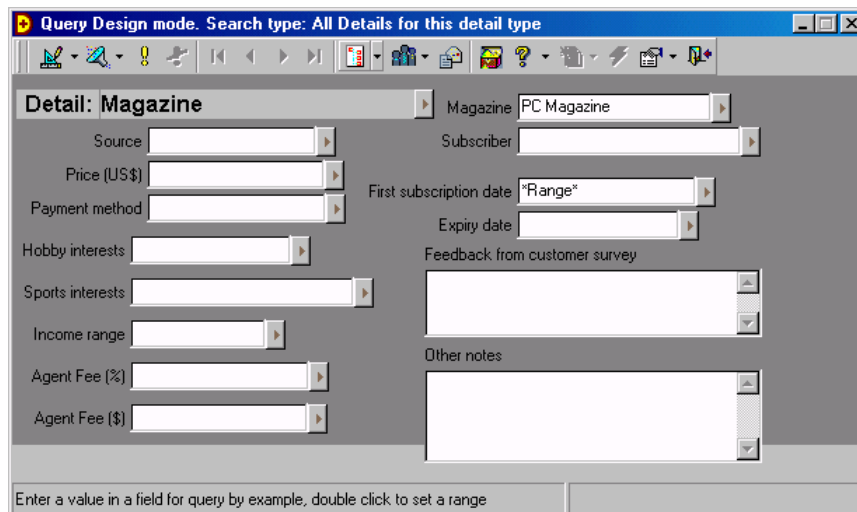


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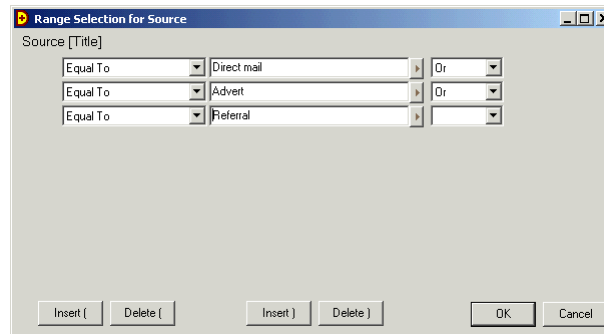
Calculated fields set up with the aid of an Expression builder allows field values to be automatically calculated whenever the Detail is viewed or changed



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’ and Source of ‘Direct mail’... are included



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

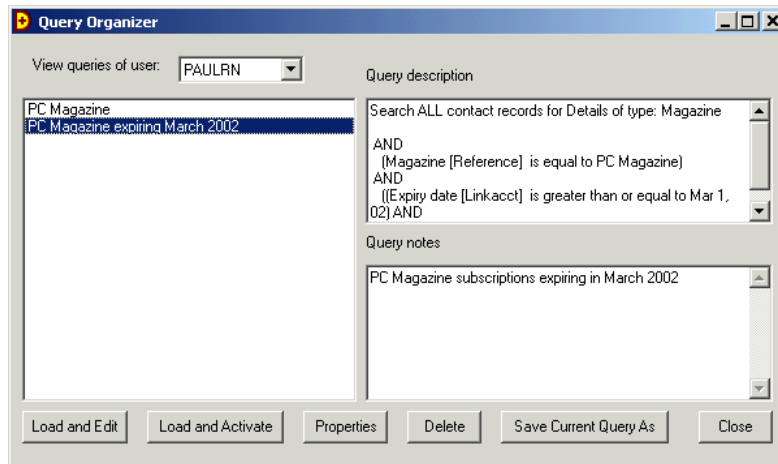


Once designed the query can be activated and the video buttons used to move to the next, previous first or last record. After each move, GoldMine is automatically positioned to show the particular contact and detail record.

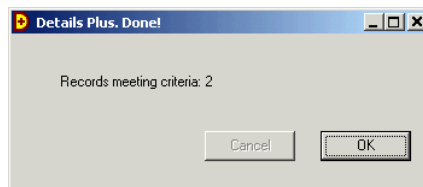


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Details Plus lets users store, load and edit queries, similar to Filters in GoldMine, using a new query management window

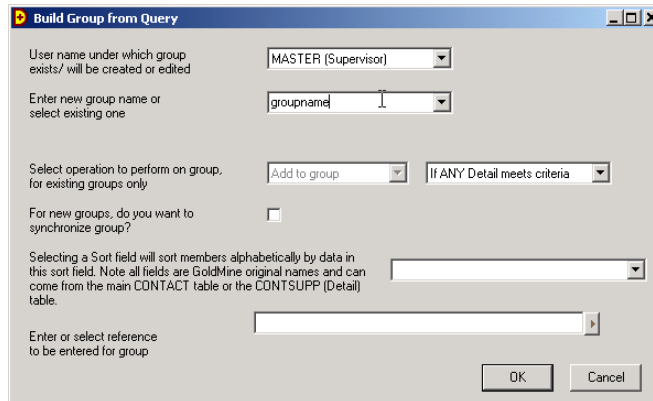


It is also easy to count records meeting the criteria – just click on the Count button and the number of records is counted.



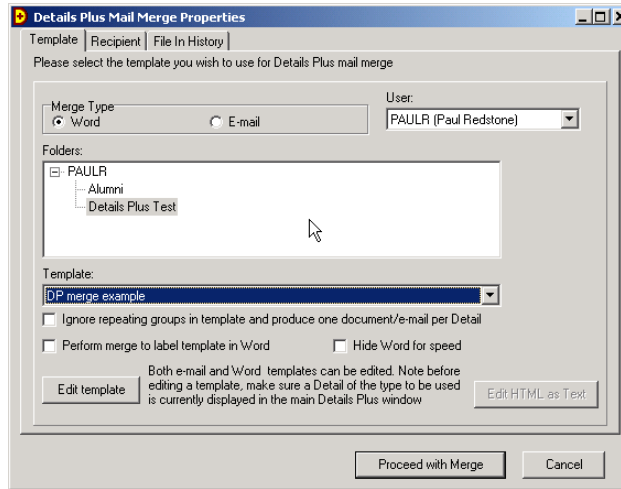
You can also build GoldMine groups from queries! Simply create and activate a Details Plus query, click the group icon, specify which group you want to create or add records to, then go. Details Plus scans records and builds a group *in GoldMine* which can immediately be used for mail merge, group schedule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

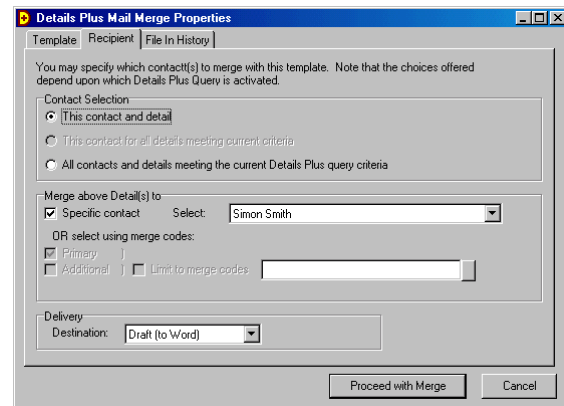
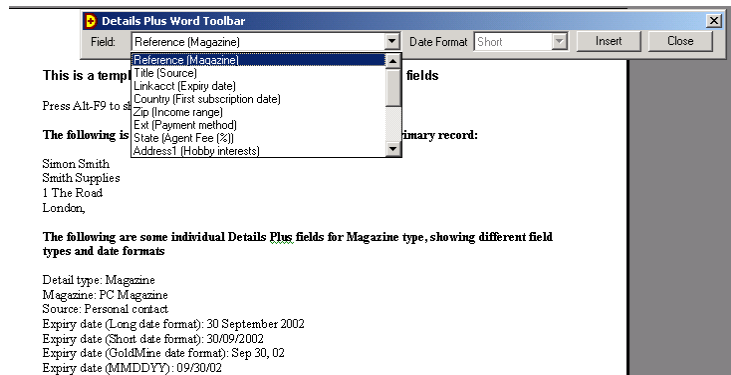
Details Plus also lets you merge to both Word and e-mail, producing one document or e-mail per Detail which meets the query criteria! This takes three steps.



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

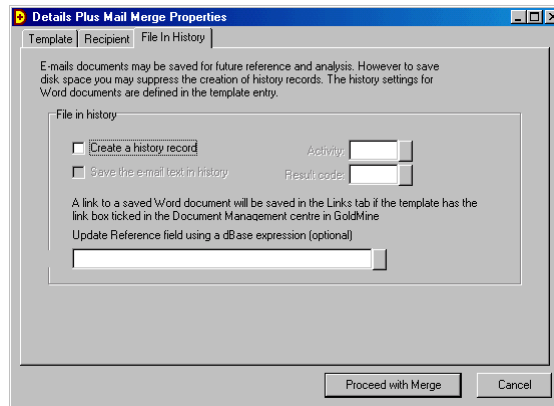
The second step in a merge is to select the subset of data to whom you wish to send the e-mail. This can be a single detail record only, or all within a Details Plus query (which also takes into account any filters and/or groups active in GoldMine). The type of merge, the template to use and the subset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





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 2 hold the additional field data? These are stored in fields in the CONTSUPP table such as Dear, Fax, MergeCodes and 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.

Where is the field position, type and label data held? Details Plus uses a Windows settings/configuration file called DetailsPlus.ini which holds data such as field types and positions.

Which versions of GoldMine are compatible with Details Plus? GoldMine 6.7, GoldMine 7.x and all versions of GoldMine Premium edition including 8.x, 9.x, 2013 up to at least GoldMine 2019.

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? Details Plus used to have an evaluation mode in which it would run with warning messages. As it is now free there is no need for this. Just download and install.

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 in English.

Limitations

Details plus can export detail data to CSV, XLS or dBF format. A change in Excel may mean that opening an XLS file gives a warning about a corrupt file. We have been unable to fix this – Details Plus uses a component for the export which is no longer updated. You can simply accept the prompt to open the file and it works fine.



Details Plus™

Licensing and Pricing

Details Plus is now free. Should you wish you can make a donation to Clew on our web site.

Support

New versions and releases may be released if required to cope with changes in GoldMine or other systems, but this is not guaranteed. Support by e-mail will generally be free but for more involved support we may want to levy charges which will be agreed in advance.

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