Collector's Assistant

Version 10

User Manual

May 21, 2013

Overview

Sources of Information on Collector's Assistant

There are a number of sources of information regarding use of the Collector's Assistant.

- This Manual – this manual describes most functionality accessible within the Collector's Assistant
- Carlisle Website (www.carlisledevelopment.com)
    - Technical Support - Frequently Asked Questions – provides answers to many commonly asked usage questions, organized by category
    - Technical Support – Tips & Techniques – provides more indepth descriptions of some functions
    - Technical Support – Video Tutorials – provide brief videos which illustrate some common operational sequences

Organization of this Manual

This manual is organized in order so that topics of most interest to all new users are in the early chapters, followed by more advanced topics which are more likely to be of interest to user who have mastered the basic operations and wish to exploit some of the advanced functionality of the Collector's Assistant or customize their user experience.

Chapter 1 defines important terminology user throughout this manual.

Chapter 2 defines the major elements of the User Interface

Chapter 3 focuses on the essential tasks needed to catalog your collection.

The remaining chapters cover specific topics in greater detail such as printing, searching, setting user preferences and customizations.

What’s New in Version 10

Version 10 is data compatible with versions 8 and 9 and builds on this platform with the addition of substantial functionality:

- RealValue Pricing – The user may now specify rules to adjust the value in order to get a better sense of liquidation value. Rules may be defined based on value and scarcity
- How To – We have added a major new section under the Help Menu consisting of detailed instructions on a variety of functionality, both basic and advanced. This is intended to provide the best source of user instruction. The How To topics are user customizable using a text editor and also will be extended by us periodically. It will also be used to provide customized instruction.
- User Interface Enhancements – We have eliminated the Guide to Common Actions and replaced it with direct control buttons for the most commonly used functions (adding items, setting sort order, printing, searching.
- Automatic Repair – The Collector’s Assistant has the capability to repair a few of the more commonly occurring problems.
- Synchronization with mobile devices – During 2013 we will be releasing mobile versions of the Collector’s Assistant. Version 10 has the ability to synchronize data with mobile versions.
- URL associations with items in your collection – You may now save up to 10 URL’s per item in your collection and link to them directly on the internet.
- Database segment of US Medals - We have added a new database segment for medals issued by the US Mint and populated it with recent medal issues. We will be keeping it current going forward and over time we plan to add earlier issues.
- Standard Database Window is now visible in an abbreviated version (no pictures/values) so that it obscures less of the current collection.
- User Working Directory may be changed at any time.

Chapter 1: Terminology

There are a few basic terms which will be used throughout the manual. Please take a few minutes to review this terminology:

- Controls & Selection Area – this is located along the left portion of the Collector's Assistant window and enables the user to select their collections and also User Preference settings. Collections are organized into groups (initially all collections are in the group My Collections). At the top of the Controls Area are function button to access the most important functionality. A few of these buttons may be hidden in order to provide more vertical space for listing of the collections.

- Action Bar or Menu – located along the top of the Collector's Assistant, this is used to access most functions available within the Collector's Assistant. One choice on the menu "Guide to Common Actions" provides controls for manual data entry when required.
- Collection Display Window – When you select a collection, a new window will appear, displaying the contents of that collection. This window contains two major sections, divided by a horizontal splitter bar:
    - Collection Listing Grid – a columnar display containing 1 row per item in the current collection, with user customizable columns
    - Tabbed folders – used to display and edit all information for the item that is currently selected in the Collection Listing Grid.
- Dropdown or Choice List – these controls used widely throughout the Collector's Assistant are used to select from among a group of existing choices and/or enter new choices
- Status Bar – located at the bottom of the main Collector's Assistant window, the status bar displays the totals of the current collection or the Grand Totals of all collections.

Chapter 2: User Interface

The user interface of the Collector's Assistant consists of several major components:

- Action Bar/Menu – Located along the top border of the Collector's Assistant, the action bar (menu) provides access to most functions available within the Collector's Assistant. It consists of a static portion of choices which are always available as well as additional choices that appear when a collection is displayed.
- Controls Area – Located along the left hand border, this provides for selection of the collection to be worked with as well as user preferences. It also includes the most important function buttons.
- Windows area – the remainder of the interface consists of a large area in which windows will appear:
    - Collection display windows – each time you select a collection, a new window will open containing a display of that collection
    - Search results window – a window displaying items from all collections meeting search criteria
    - User Preference settings – each user preference area opens a window when selected
    - Specialized function windows – a number of other operations (Collector Tools, etc) will open new windows.
- Status Bar – displays collection totals at bottom of Collector's Assistant main window

Action bar/menu

Static Menu Choices

- Controls – determines the width of the controls area
    - Hide – controls area width set to 0 (hidden)
    - Show – controls area width set to default value
    - Expand – controls area width set to wide setting
    - Add Collection Grouping – new function in V9, allows user to create new collection groups
- View – determines what user data will be presented in controls area and also provides direct access to view standard databases if available for your collectible.
    - Database – opens a window with a collectible selector for those collectibles that are part of your Collector's Assistant package. Available databases include Coins (United States, World), Ancient Coins, Casino Chips, Paper Money (United States, World)
    - User: MyData – this is the default user
    - User: xxxx – additional users will appear if created

  Selecting a user will populate the collections group of the controls area, User: MyData is automatically created and selected on installation of the Collector's Assistant.
- File – accesses backup and restore and history sub menus
    - Backup & Restore – opens a window providing backup and restore functionality as well as move to a new computer functions.
    - History
        - Create history record – saves a summary of collection statistics (maximum frequency of once per month)
        - View history – tabular and graphical presentation of history records
    - Exit – closes the Collector's Assistant
- Find – access to search functions
    - New QuickSearch – displays the search window which allow the definition of adhoc or saved searches
    - Saved QuickSearch – accesses a submenu of previously defined searches
- Print
    - Current Collection – prints the current collections

- Current Collection – Selected Items – prints only the selected items in the current collection
- Selected Collections – Summary – prints 1 line of summary information for selected collections
- Selected Collections – Detailed – prints all items in a selected subset of collections
- All Collections – Summary – prints one line per collection with summary information
- All Collections – Detailed – prints all items in all collections
- Setup Printer – accesses print driver settings

- Collector Tools
  - Analyzer
  - Grading Assistant – accesses the Grading Assistant if available (separately purchased product)
  - Coin Type ID/Mint Mark Locator – gallery of US coin types by denomination with graphic overlays indicating position of mint marks.
  - Coin Variety Identification – gallery with graphic overlays of common coin varieties (small date, large date, etc)
  - Toned Coin Image Gallery – gallery of attractively toned coins
  - Insurance Planning – accesses function presenting blanket and individual item insurance information
  - Estate Planning – accesses function to manage heirs and estate allocations
  - (Only if Survival Manual installed) Survival Manual Tools
  - (Only if Top 100 Morgan Varieties installed) Top 100 Morgan Tools
  - Collector's Assistant-Bullion Content - generates a text file with the detailed bullion content of your collections.
  - (Only if Bullion Analyzer installed) Bullion Analyzer Tools
- Updates
  - Apply Value Update to All Collections – processes each item in every collection and applies the latest market values (used after downloading a new value update or importing items from another product)
  - Updates – Online updates (subscribers) – accesses online database and market value update subscriptions

    - Recalculate All Totals – assures that all calculated fields on all items in all collections are up to date
    - Change Path of Attached files – used to reconnect attached pictures and documents if they have been relocated to another location on your computer.
- Help
    - About – displays product version and contact information
    - Auto Repair – accesses diagnostics and auto repair functionality
    - How To - accesses new How To topics.
- Guide to Common Actions
    - Add Item to Collection – displays standard database or adds contents of the tabbed folders as a new item if "manual entry" is checked
    - Create New Collection – displays Guide to Common Actions so that user may create a new collection
    - Manual Entry – determines action of Add Item to Collection – normally unchecked causes standard database to display
    - Clear Fields on Add – for manual entry, causes tabbed folders to clear out after a new item is added
- Mobile Synchronization
    - Check for Mobile Data - used to see if updated data has been entered in a mobile device
    - Export to Mobile Device - used to provide a data update to a mobile version of the Collector's Assistant.

Dynamic Menu Choices – appear when a collection window is visible

- Collection – a group of functions which operate on the currently selected collection window
  - Save Sort Order – Associates the current selected column sorts as the default for the current collection. This sorting will automatically be set each time the collection is opened.
  - Select Listing Format-> - displays a submenu of existing listing formats, any of which may be selected. The listing format controls the content of the Collection Listing Grid
  - Totals - used to include/exclude a collection in the totals
  - Redisplay Collection – causes collection to redisplay with standard sort order selected, values and all totals updated
  - Print Preview – displays the current collection in the print preview window
  - Move Collection to Group – used to move a collection between collection groups
  - Delete Collection – deletes the selected collection
    - NOTE 1: this menu function is the only way to delete an entire collection within the Collector's Assistant. In fact, the collection is not actually deleted, rather it is moved into the folder History under My Collections. The collection may be recovered by using Windows My computer to relocate the file back to the My Collections folder.
    - NOTE 2: Right clicking on a collection name in the Collection group displays a context menu with two choices, rename and remove. The remove is temporary and the collection will be back when the Collector's Assistant is restarted.
  - Update Numismatic Data – processes all coins in the current collection updating the numismatic data with the most recent information in the standard database. This function should be run after downloading US Coin Database listing updates.
  - Export Data to Delimited Text File – places the selected items in the current collection listing grid in delimited format into the file c:\CollectorAssistant\MyData\CAExport.txt for export to MS Excel and a variety of other spreadsheets and databases.

    - Import Data from other Applications – displays the Import window which allows a user to bring in a tab delimited text file and import its contents as items in the current collection
    - Merge Coins with Standard Database – attempt to recognize imported or manually entered coins, and if identified merges them with the information in the standard database
- Item – a group of functions which operate on one or more items in a collection
    - Copy – marks one or more items for a copy operation
    - Paste – adds new items from the previous copy operation
    - Delete – deletes one or more selected items from the current collection
        - Note – this is the only means of permanently deleting items from a collection. Clicking on the Delete key on the keyboard will only temporarily remove items from the list. They will return when the Collector's Assistant is re-displayed.
    - Move Items – moves a group of selected items to a specified destination collection
    - Attach Document to Item – allows an RTF document to be used to populate the note field.
    - Modify Selected Items – used to make a common edit to a group of selected items.
    - Select All – highlights (selects) all items in current collection
    - Internet Links - used to attach or link to URL's associated with items in your collection.
- Values
    - Display Values Table – displays a table of grades and values for the currently selected item (Note – it is possible to have the values table always appear automatically)
    - Hide Values Table – hides the values table
    - Values Changed
        - By More Than Percent – highlights all coins whose value has changed by more than a selected percentage (green for increase, red for decrease)
        - By More Than Amount – highlights all coins whose value has changed by more than an absolute amount
        - Clear Highlights

    - Display Historical Values displays a tabular presentation, which may be graphed of the values trends for the currently selected coins
    - Hide Historical Values – hides historical values table and/or graphs
- Format Listing
    - Add/Remove Column – accesses listing format customizer with simpler UI for specific purpose of add/removing columns
    - Change Grid Settings – accesses listing format customizer with simpler UI for grid settings
    - Customize Listing Format – accesses listing format customizer with full functionality
- Undo – undo menu for undoing recent operations
    - Edits to Currently Selected item – undoes recent edits to one item
    - Remove most recently added items
    - Restore most recently deleted items
    - Restore most recently deleted collection

User Interface Settings that may be remembered

The following settings may be made by the user and permanently remembered until changed (Requires V8.1.1 or above):

- Size/Location of main Collector's Assistant window – automatically remembers any time borders are moved. Note-maximizing the window will not be remembered, so to have the window open as large as possible, move the borders out by dragging them when the window is NOT maximized

- Size of windows that appear as collections are opened.
    - Open a collection and adjust its size by dragging the borders

- Location of horizontal splitter bar in a collection window (separates tabbed folder from collection listing grid) and also whether or not market values table is displayed. - These will be remembered automatically when a Collection window is resized.

- On opening the Collector's Assistant, what collection groups will be expanded
    - All - all collection groups expanded
    - None – no collection groups expanded
    - Name of specific group (for example, My Collection) – only that group will be expanded, all others will be closed.

- Standard Database window size and whether or not Pictures/Values are displayed - set by displaying database and clicking on Save Window Settings

Note: Some setting changes will not take permanent effect until you exit and re-enter the Collector's Assistant.

Chapter 3: Cataloguing your collection

In the Collector's Assistant, collections are used to organize your items into logical groupings. For collections, consisting of several hundred items or less, all items might be grouped in one collection, but for collections consisting of thousands of items, it will usually be advantageous to group items in smaller collections.

For example, a coin collector might have collections such as Gold Coins, Morgan Dollars, etc. whereas a Book Collector might have collections named First Editions, Children's Books, etc)

There is no correct way to organize your items, rather you should choose an organization which reflects how you organize things.

There are three basic operations needed to catalog your collection:

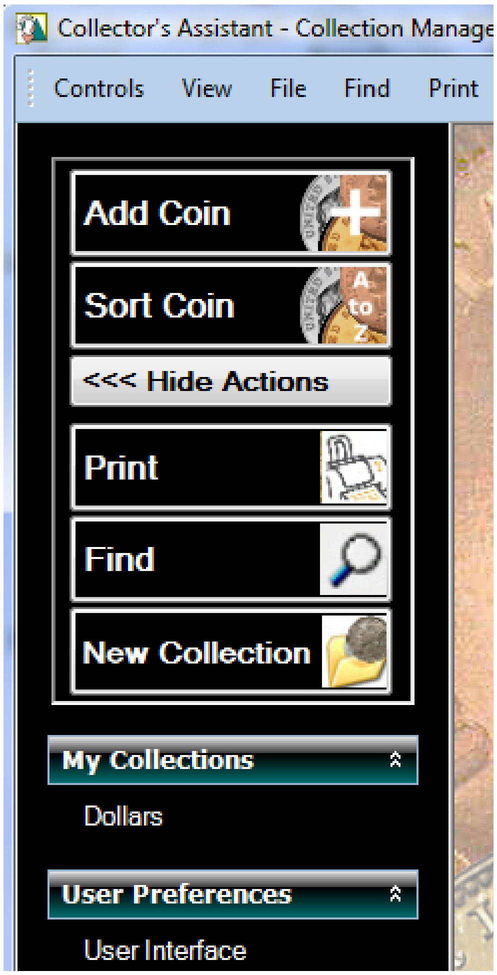
- Create a new collection
- Add Items to a collection
- Edit Information pertaining to an item already in a collection

Create a Collection

All controls required to create a new collection are located at the top of the Controls area at the left of the product.

- Click on "New Collection" button (you may need to click on Show Actions if it is hidden
- Select the collectible type (example, coins) in the dropdown provided (note – this step is not required for Collector's Assistant's containing only support for one collectible such as the Coin Collector's Assistant, in which case the dropdown will not be visible).
- Enter a name for the new collection
- Click on Enter
- If needed, you may create additional collections. When you are done adding collections click on the Done/Cancel button.

The collection will appear in the controls area under the grouping My Collections or under the currently selected collection group (if the user has added collection groups). In the illustration below, the user has added a collection group named Dollars.



Adding Items to a Collection

Once you have a collection, you will want to catalog the items that it will contain. There are two ways to add items to a collection:

- Copy items from one of our standard databases
- Manually enter items

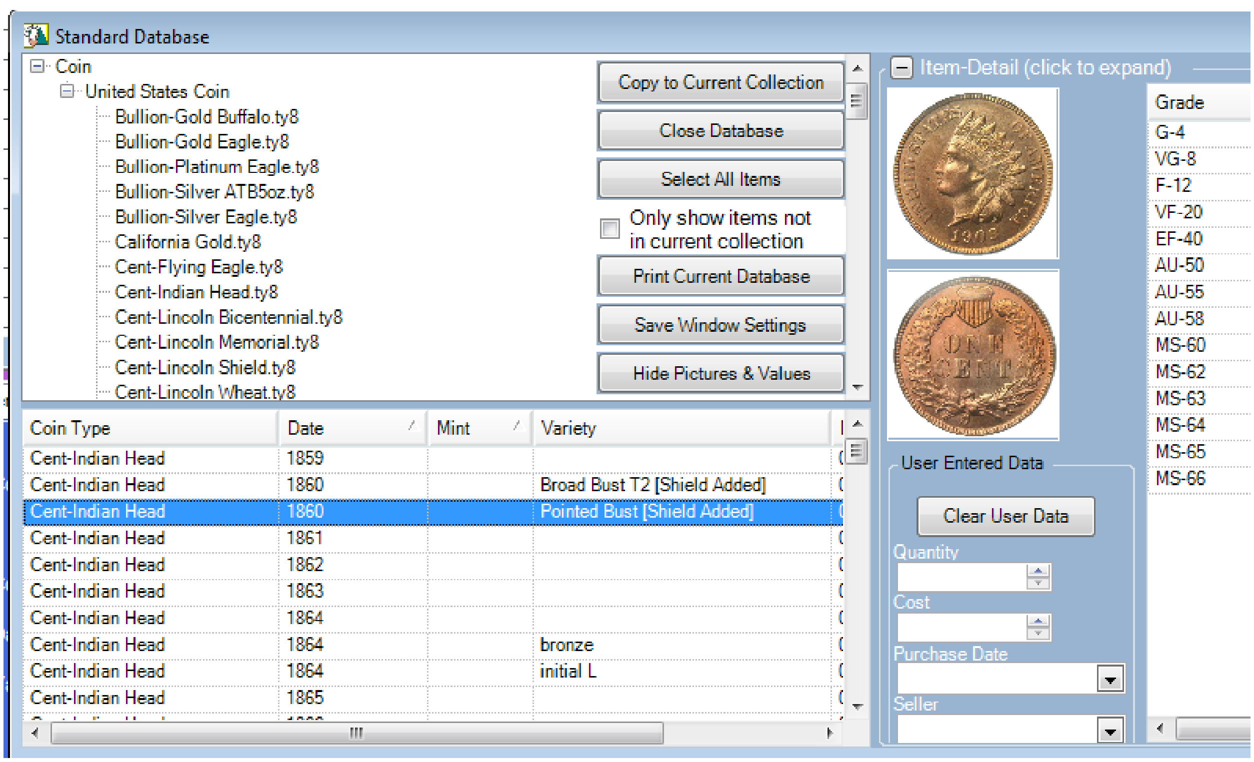
In general, if a standard database is provided, items should always be copied. For items which are not contained in a standard database, manual entry will be required.

- Copying Items from a Database:

- Select the collection in the controls area
- Click on "Add Coin" button located at the top of the controls area. This *will display the standard database*.
- Select the database category (such as Dollar-Morgan) *A list of items contained in that category will appear)*
- Select items (s) to copy and click on "Copy to Current Collection" button located within the Standard Database window.
- Repeat as needed and then Close the database window by clicking on the close icon in the upper right corner

Note – new in V9, is the ability to enter user data such as cost, grade, etc while the item is being copied from the database, as illustrated om the following illustration.

All coins added will have their fields populated with any user data. You may clear the user data fields by clicking on Clear User Data.



- Adding Items Manually

- Click on the “Guide to Common Actions” choice on the menu and check the preference “Manual Entry”
- Enter the desired information in the blue tabbed folders
- Click on “Add Coin” button.

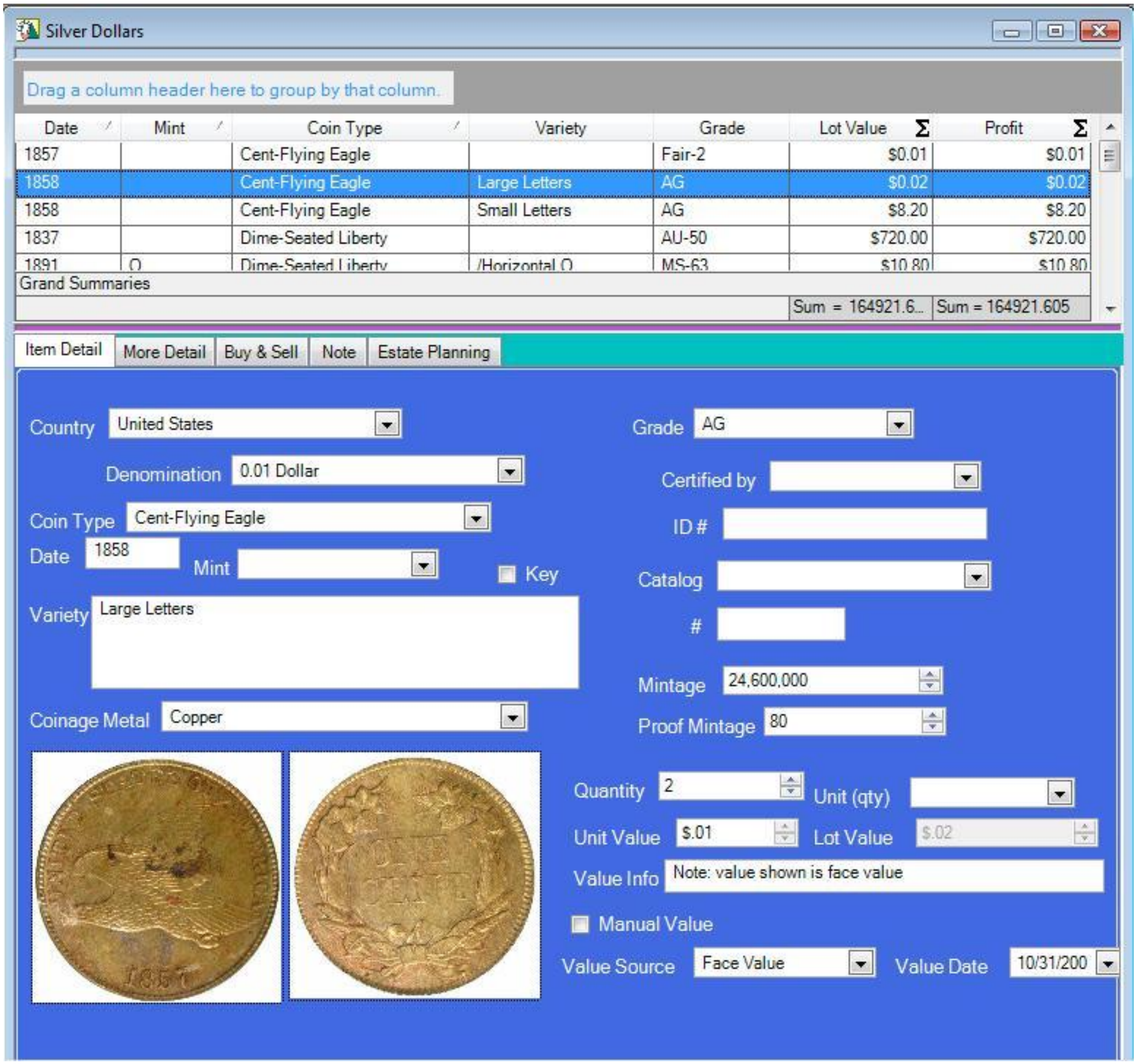
Note when adding items manually, there is a preference under “Guide to Common Actions” on the menu named Clear Fields on Entry which determines whether or not the information fields on the tabbed folders are cleared when an item is added. If you are adding different items, clearing may be most efficient. If adding very similar items, it might be best to leave the fields populated with the data for the last item.

There is a check box in the Standard Database window labeled Only Show Items not in Current Collection. If checked the database listing will be limited to items not existing in the current collection. The columns (Date, Mint, etc) displayed in the database listing are controlled by the listing format “Database” which may be user customized.

You may print the current database listing by clicking on Print Database.

Editing information about an item

Edits to an item in one of your collections are made by selecting it in the collection listing grid (which will populate the blue tabbed folders) and then editing the desired fields on the tabbed folders. Edits occur in real time.



Collection Groups

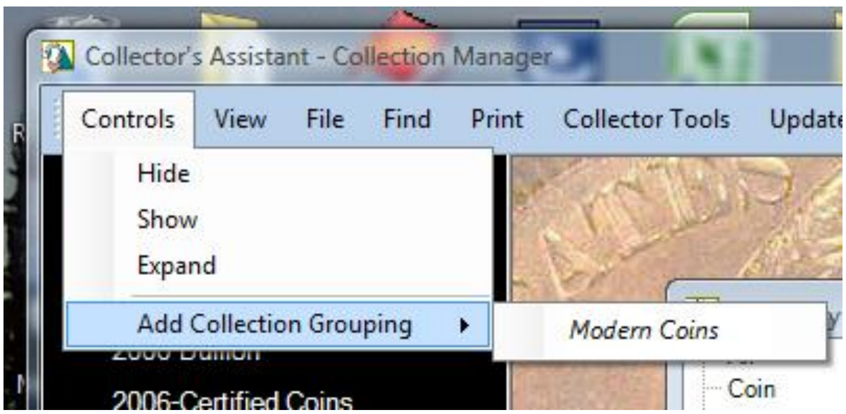
You may wish to organize your collections into groups. For example My Best Coin Albums, Sold Coins, etc. Each group will appear separately in the controls area and may be expanded or contracted. With respect to collection Groups:

- Each group maintains its own grand totals
- Collections may be moved between groups

- Items may be moved between collections in the current group (Note to move items from a collection in one group to a collection in another you must temporarily move the collection so it is in the same group)
- Unique inventory codes, if in use are assigned for each user without regard to what group a collection is located within.
- Cross-collection reports utilize the current selected group
- Find operations use the currently selected group

To create a collection group:

- Click on Controls->Add Collection Grouping
- Enter a name in the box provided and click on Add Collection Grouping



The new group will appear immediately above the User Preferences Group

You may Remove or Rename a collection group by right clicking on it and then clicking on Rename Group or Remove Group. You may only remove a group if it has no collections. If you wish to remove a group containing collections, you must first move all collections to another group or delete the collections.

Chapter 4: Display and Print Your Collections

The Collector’s Assistant contains extensive capability to view and print your collection data.

Collection Listing Grid

The Collection Listing Grid displays the currently selected collection in a spreadsheet like format consisting of one row per item. The user may control the content, grouping sorting, and formatting of the grid. When a new collection is created, no sort order is specified so new items will be added at the bottom and the items will appear in the order in which they are entered. You will probably want to set the sort order so that items appear as you would like.

Print button on Controls Area

If a collection is currently open, clicking on the Print button will immediately send it to the printer, otherwise the Report Manager will appear.

Grouping and Sorting

There are two ways you may specify how items are ordered within the Collection Listing Grid. Either by direct manipulation of the column headings or clicking on the Sort Coin button at the top of the controls area. Clicking on the Sort Coin button will provide dropdowns to select up to 5 sorts and 1 grouping as well as a Save button.

Grouping and sorting may also be accomplished by direct manipulation of the grid. You may drag a column heading to the area above the grid which will then cause all items sharing the same value to be grouped together.

Sorting is accomplished by clicking on a column heading. Multiple sorts can be accomplished by holding down the shift key as you click on column headings in the order in which sorting is to occur. You may save a sort by clicking on Collection->Save Sort Order.

Note - the order in which data is catalogued is not important. The sorting/grouping which may be changed at any time enables you to view and print the data in the desired order.

Format of Collection Listing Grid

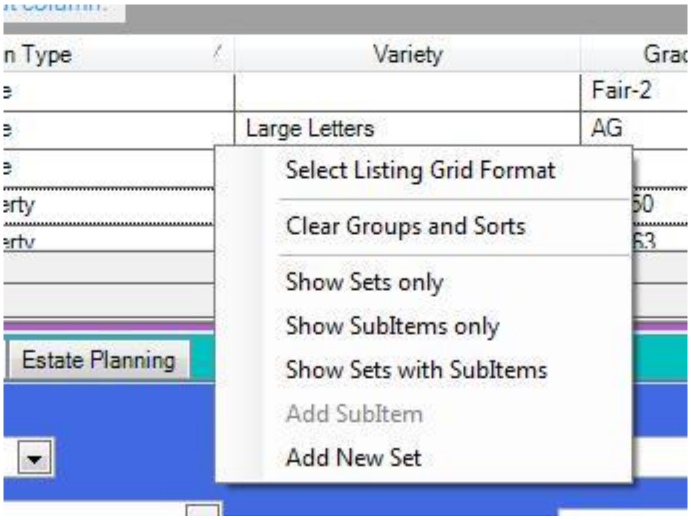
The format used to display the Collection Listing Grid determines:

- What information fields are included
- Column order and width
- Numerical formatting and text alignment
- Column text color
- Subtotal options

Collection Listing Grid Menu – accessed by right clicking on the grid or by clicking on Format Listing on the main menu

Right clicking on the Collection Listing Grid will display a context menu for manipulating the Collection Listing Grid:

- Select Listing Grid Format – displays a windows which can be used to select an existing listing format as well as modify or create new ones.
- Clear Groups and Sorts – Removes all assigned groups and column sorts – collection is then displayed in the order in which the items were added.
- Show Sets only – if the current collection contains sets (containers with multiple items) each set is represented by one row representing the aggregate information for the items it contains.
- Show subitems only – If the current collection contains sets, only the items in the sets are listed
- Show Sets with Subitems – each set is represented by a top row reflecting the entire set, followed by the individual items
- Add SubItem – opens the standard database in a mode in which items are added as children of the currently selected set.
- Add New Set – adds a parent lot with the expectation that individual subitems will be added later.



Collection Listing Formats

The customize listing format dialog allows the user to select and modify listing formats. Listing formats determine the contents and appearance of the Collection Listing Grid. Using this dialog, the user may:

- Add columns
- Delete columns
- Re-order columns
- Change Column Width
- Change Column color
- Change the font used for the entire grid
- Include subtotals at bottom of listing and at main sort changes
- Determine alignment and numerical format of text
- Specifies landscape mode when the format is used for printing
- Include a footer with page number
- Include a text page header including collection name and date

Changes made to a listing format affect all collections which use that format. The user may create and modify as many formats as they wish. Two formats are provided which may be customized but not deleted:

- Standard – the default format used for a newly added collection
- Database – the format used for a standard database

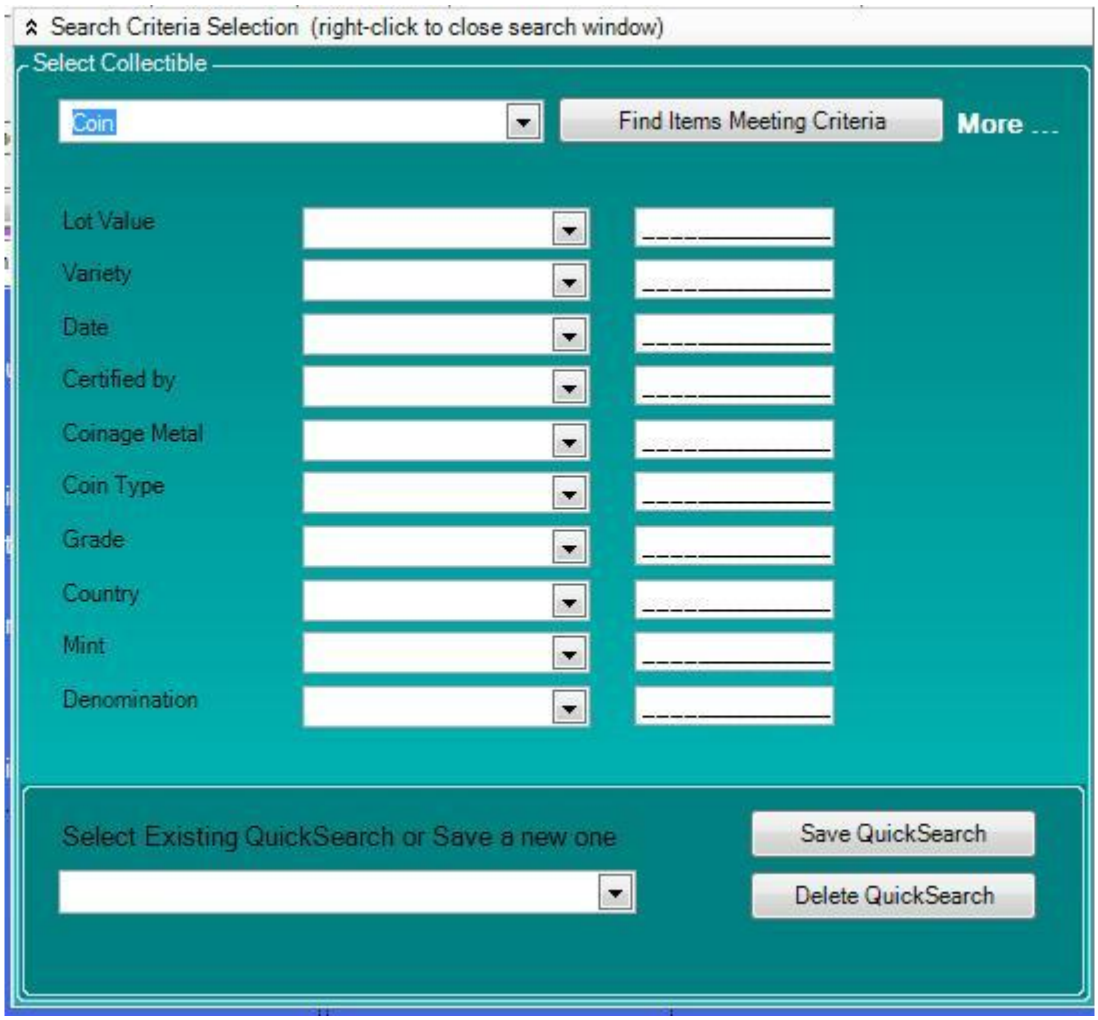
Right-clicking on the Customize Listing Format dialog hides this dialog when you have finished your customization.

Chapter 5: Find Item in Your Collections

The find function allows the user to specify a multi-parameter search and displays a single window containing all items from all collections meeting the specified search criteria

Searches may also be named and saved for reuse as QuickSearches.

Clicking on “Find” at the top of the controls area or Find->New Search on the menu displays the search windows. The first step is to select the collectible in the dropdown provided. This will populate the search frame with the information fields which have been identified as search fields.



The most common search fields are displayed. Additional search fields are displayed by clicking on “More…” You may include as many parameters as you want to include in the search criteria. Items that will be displayed must satisfy all search criteria. To include a parameter select the test to be used:

- > items greater than the entered value
- < items less than the entered value
- = items equal to the enteredvalue
- Between – items between two specified values
- Contains – strings containing the specified substring
- >= items greater than or equal to the specified value
- <= items less than or equal to the specified value

Most tests require entry of value, however when you select between, a second box will appear for the second value.

Once you have defined a search, you may save it for reuse. To do so enter a name for the search in the dropdown labeled "Select Existing QuickSearch or Save a New One" and then click on Save QuickSearch. Saved QuickSearched can be selected once the Search window is displayed or directly from the main Collector's Assistant menu where they will be listed under Find->Saved QuickSearches.

Once you have defined or selected your search criteria, click on the button "Find Items Meeting Search Criteria" to display the results.

Results will be displayed using the selected Listing Format including items from all collections meeting the specified search criteria. In addition, the leftmost column will be added to include the Collection Name so that you will be aware of where items are located.

Once the search results are displayed, you may:

- Print the results using Print->Current Collection
- Hide the parameter window by right clicking on it
- Manipulate the results grid by grouping or sorting the results. For example, dragging the Collection column heading to the group area at the top will group the results by collection.

Note for checkboxes, the parameter must be set to Yes for checked or No for not checked.

Chapter 6: User Preferences

Located at the bottom of the controls area on the left side of the Collector's Assistant is the Group User Preferences consisting of a number of user defined items:

- User Interface – settings which determine how the collection window will open as well as some features of the main Collector's Assistant window
- Printing – global printer margins and font selection
- Colors – used to set background colors for tabbed folders and controls area, may also be used to change font size of tabbed folders
- Values – automated value logic, currency formatting and precious metal spot values
- Choice Lists – maintenance of contents of all preloaded dropdown lists
- Users and Folders – used to add users and manage passwords
- Contacts – accesses a database of contact information for contacts of interest to the user. Includes direct hyperlinks to websites
- Inventory Code Management – activates automatic number assignment to each item catalogued
- Data Entry Screens – Customization – allows user to add, relocate, modify and delete information fields located on the tabbed folders
- Conversions (V5-V7) – brings in data from earlier versions of the Collector's Assistant

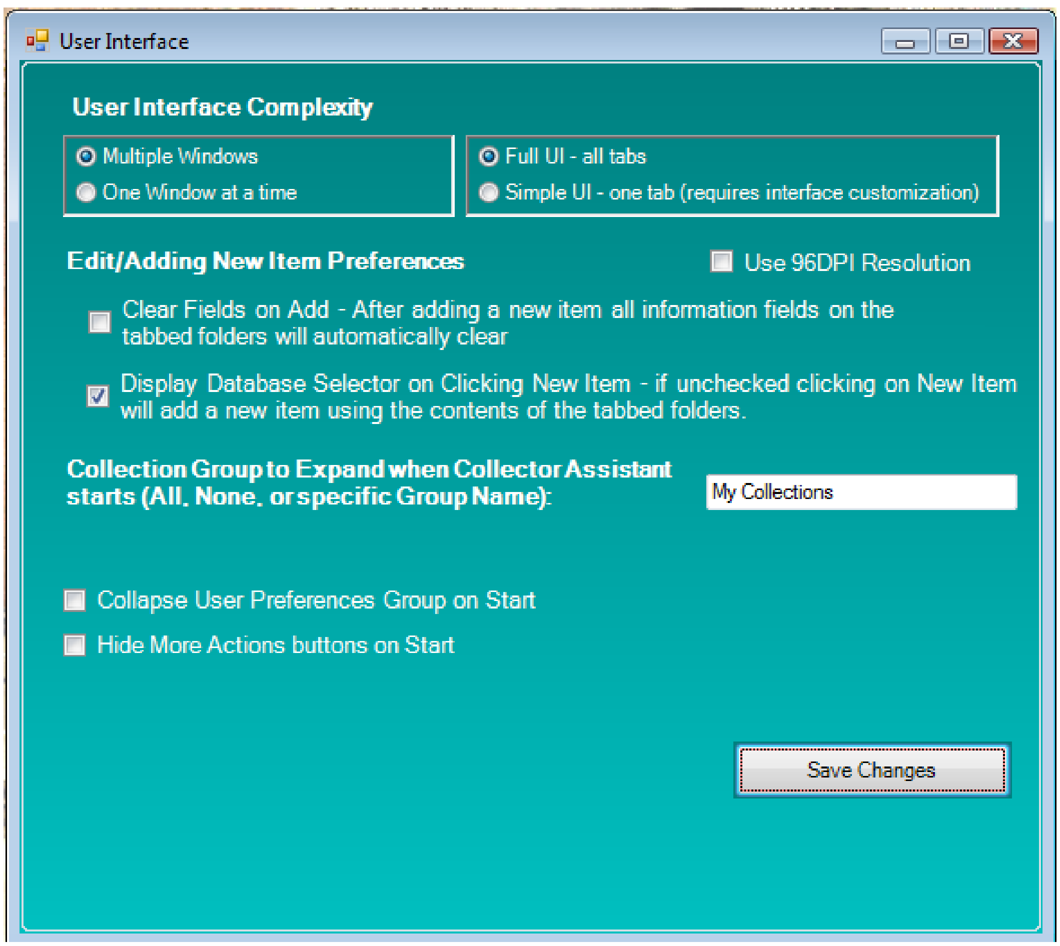
User Interface

User Interface Complexity – Determines if more than one collection window is displayed at one time and also if tabbed interface only has one tab. Note all users should start with the full UI. A one tab setting requires customization of the data entry fields to include the desired fields on one tab (contact Carlisle Development tech support)

Editing/Adding New Items - This section contains the preferences which set the default states of the preferences that affect the addition of items to a collection. There are two settings:

- Display Database Selector when clicking on Add New Item – determines whether you are normally addition new items by copying items from the database or manually entering them

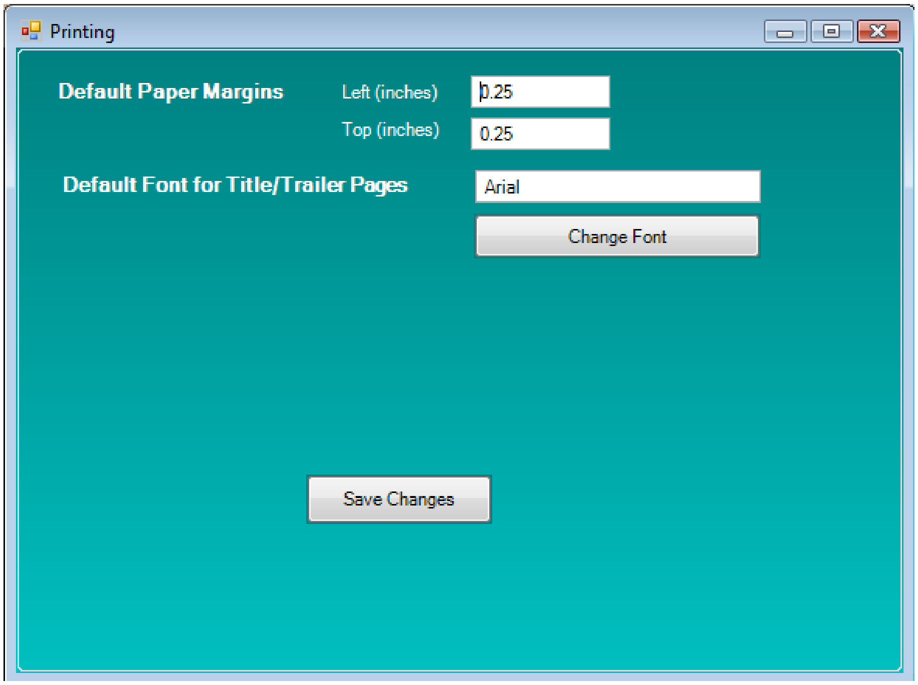
- Clear Fields on Add – determines whether all information fields on the tabbed folders are cleared after adding an item. When adding very different items, it is usually best to clear fields whereas, if you are adding items with many common fields it might be best to use the information from the last added item as a starting point for the next.
- What collection groups will be expanded when the Collector's Assistant is started (All, None, or a specific group – My Collections is the default)
- Two checkboxes (added in V10) allow you to determine if the User Preferences group opens in a collapsed state and also to Hide the More Actions buttons on startup.



Printer Settings

Sets the default global printer margins for all printed reports. You may set the left and top margins in inches. The defaults are .25" for both.

Default font to be used for title/trailer pages



Value Preferences

This section contains includes preferences related to the automatic value calculation algorithms as well as currency display format.

- Bullion Spot Prices – used to calculate bullion values for coins for which this is relevant. User may specify desired prices for gold, silver, Palladium and platinum. Bullion values are calculated in two cases. Most US gold and silver issues and coins in the World Bullion Gold and Silver databases.
- Automatic Value Option – the Collector's Assistant uses a 5-level value calculation.
    - User entered value – if the user checks the Manual Value checkbox for a coin, the user entered value always takes precedence and all other algorithms are not employed.
    - Exact Coin World grade match – if the user has not checked the Manual Value checkbox, if an exact grade match is found, the associated Coin World value will always be selected for Unit Value.

- Slightly Lower Numismatic Grade – if an exact match is not found for the user specified grade, and a suitable lower nearby grade has a value, this value will be used if the algorithm is enabled.
- Bullion Value – If a Coin World value is not available, either for the exact grade or a nearby lower grade, the bullion value will be used for some silver and gold US issues.
- Face Value – the final choice for all US coins if none of the earlier algorithms produce a value.

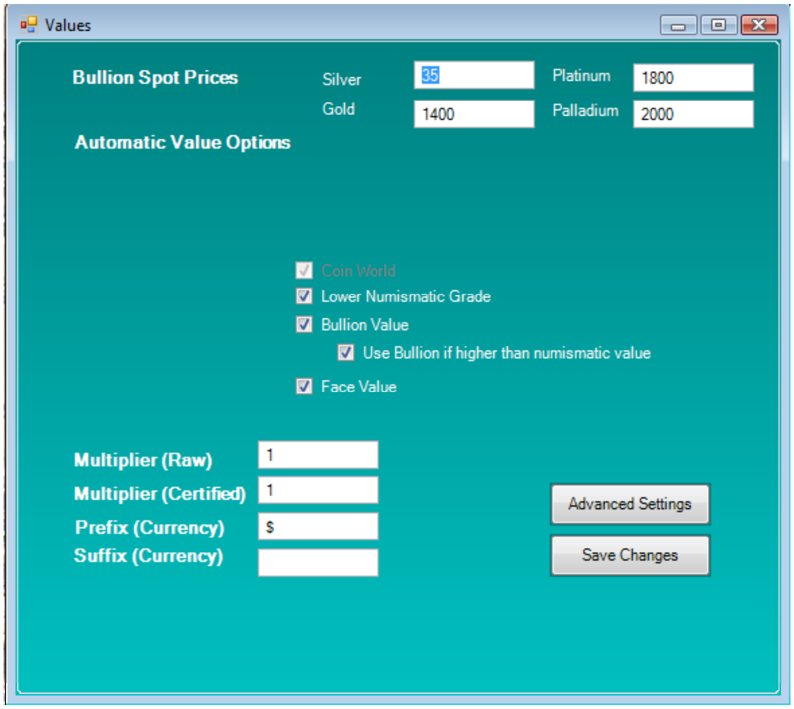
- Bullion value preference – to use bullion value if higher than Coin World.
- The checkboxes allow the user to globally disable the use of lower numismatic grade, bullion and/or face values. When the alternate values are used, the Value Info box of an item provides identification of the value algorithm used.
- Note - for users who installed the optional CDN values, additional checkboxes will appear allowing you to determine value precedence as it relates to Coin World vs CDN.

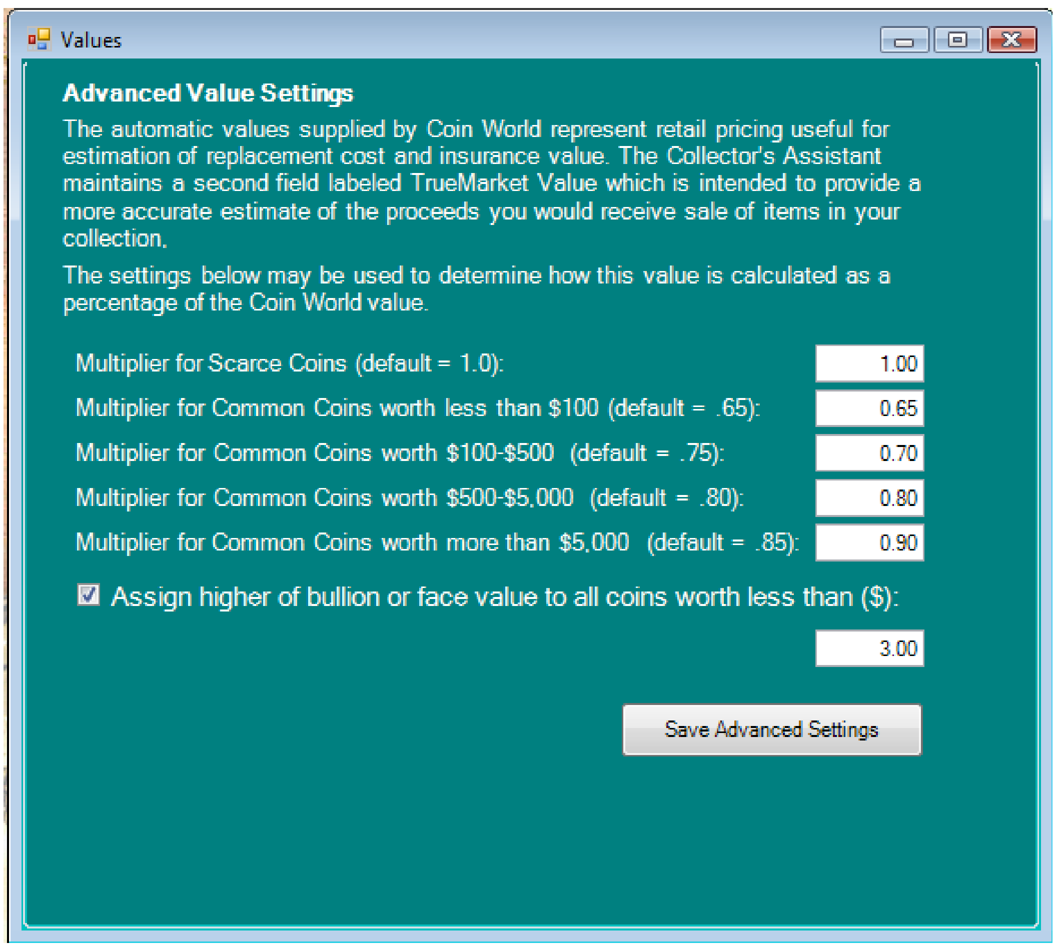
Currency Value Format

The user may specify prefixes and suffixes to be used for the display of currency fields. The default is the prefix "$" and no suffix.

To change any of the preferences, make the necessary selections and click on Save Changes.

Advanced Settings - This button takes you to the rules used to compute RealValue. You may specify individual multipliers for coins falling within certain value ranges and also multipliers for coins you define as scarce. You may also specify a threshold value below which coins will be valued at bullion or face. The results of these rules will be applied to the new RealValue field and not affect the Unit Value or Lot Value.


Values
Bullion Spot Prices
Silver
35
Platinum
1800
Gold
1400
Palladium
2000
Automatic Value Options
Coin World
Lower Numismatic Grade
Bullion Value
Use Bullion if higher than numismatic value
Face Value
Multiplier (Raw)
1
Multiplier (Certified)
1
Prefix (Currency)
$
Suffix (Currency)
Advanced Settings
Save Changes


Values
Advanced Value Settings
The automatic values supplied by Coin World represent retail pricing useful for estimation of replacement cost and insurance value. The Collector's Assistant maintains a second field labeled TrueMarket Value which is intended to provide a more accurate estimate of the proceeds you would receive sale of items in your collection.
The settings below may be used to determine how this value is calculated as a percentage of the Coin World value.
Multiplier for Scarce Coins (default = 1.0):
1.00
Multiplier for Common Coins worth less than $100 (default = .65):
0.65
Multiplier for Common Coins worth $100-$500 (default = .75):
0.70
Multiplier for Common Coins worth $500-$5,000 (default = .80):
0.80
Multiplier for Common Coins worth more than $5,000 (default = .85):
0.90
Assign higher of bullion or face value to all coins worth less than ($):
3.00
Save Advanced Settings

Choice Lists

All dropdown lists throughout the Collector's Assistant may be maintained in this section of the User Preference Area.

QuickAdd Mode – This preference determines what happens when a user enter information in a dropdown list which is not already present on the list of available choices.

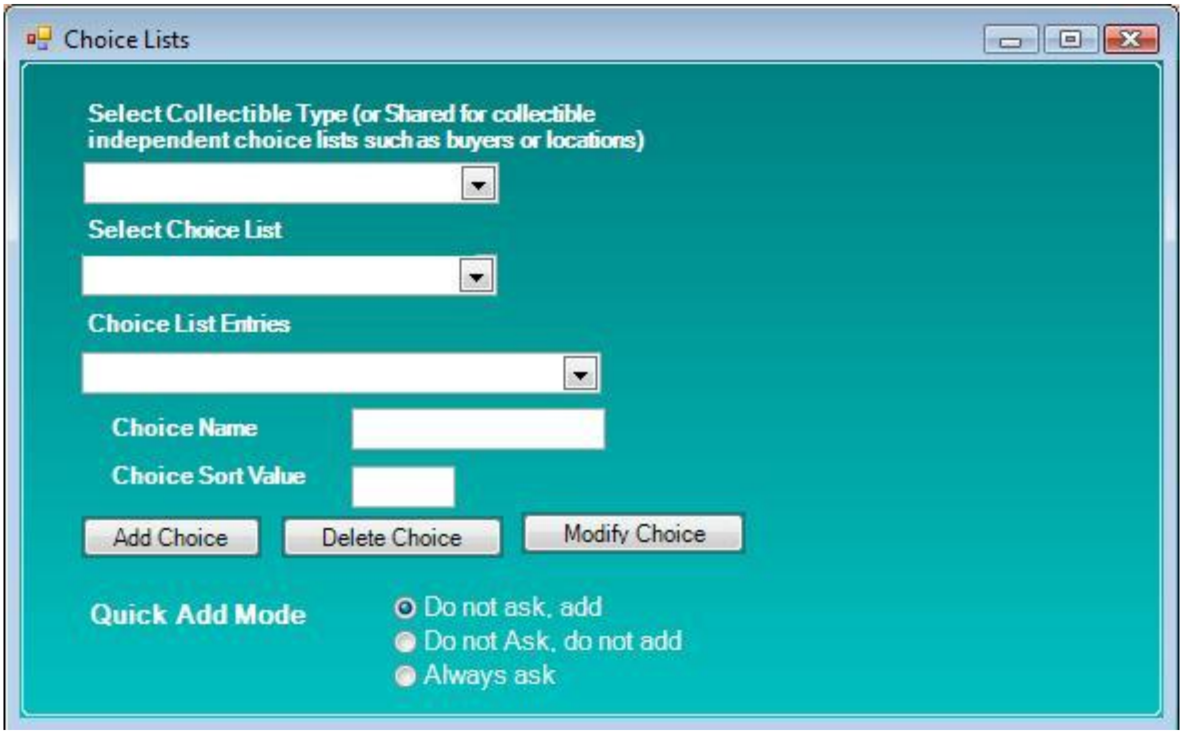
- Do not ask, add
- Do not ask, do not add
- Always Ask

The remainder of this section allows the user to add, delete and modify choices on any of the lists. Choice lists are organized by Collectible Type, for example choice lists such as Coinage Metal, Denomination fall within the collectible Coin. A special group of non-collectible specific choice lists falls within the category Shared. This includes buyers and sellers, locations and containers.

To modify a choice list, you:

- Select the Collectible Type or Shared – this will populate the Select Choice List dropdown with a list of the choice lists for that category
- Select the choice list to be modified – this will populate the choice list entries dropdown with the current choices.
- You may then:
  - Enter a new choice name and click on Add Choice
  - Select an existing choice and click on Delete Choice
  - Select an existing choice and modify its name or value and click on Modify Choice.

The Choice Sort Value is used for the purpose of sorting when an alphabetic or numerical sort will not produce the desired result. This is used within the Collector's Assistant for the Grade field. Each grade is assigned a value indicating its correct order and the value is the basis of sorting and also searching.

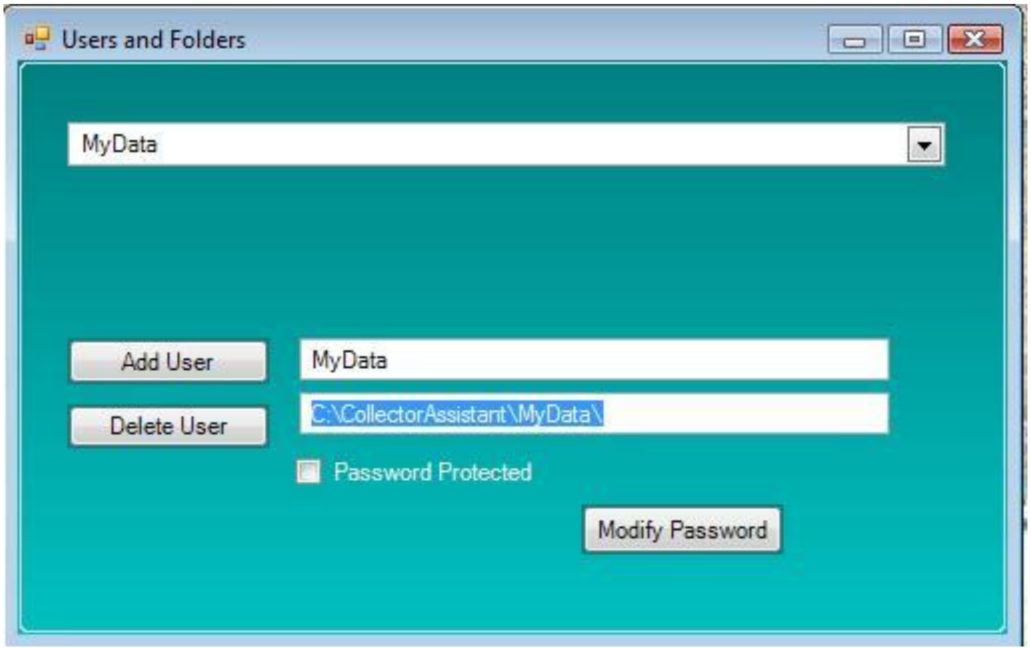


User and Password

On installation, a default user MyData is created and a single folder contains all user collection data. Some users will wish to password protect their files and others may wish to segregate their collections into different folders. For example, a family with several coin collectors might create several users.

To Add a new user: Enter a name for the user in the dropdown to the right of the Add User button and click on Add User. A new folder will be created and the entered user name will be added to the View choice on the main menu of the Collector's Assistant.

To set a password – select the user in the dropdown provided and then check the password protection checkbox, next click on Modify Password which will enable you to define the password to be used for this user.



IMPORTANT: All newly added user folders are created as subfolders to the installation folder of the Collector's Assistant (the default is C:\CollectorAssistant\). Having all user folders as sub-folders is strongly recommended as it enables full functionality of the PackNGo function for moving to a new computer and also full backup functionality.

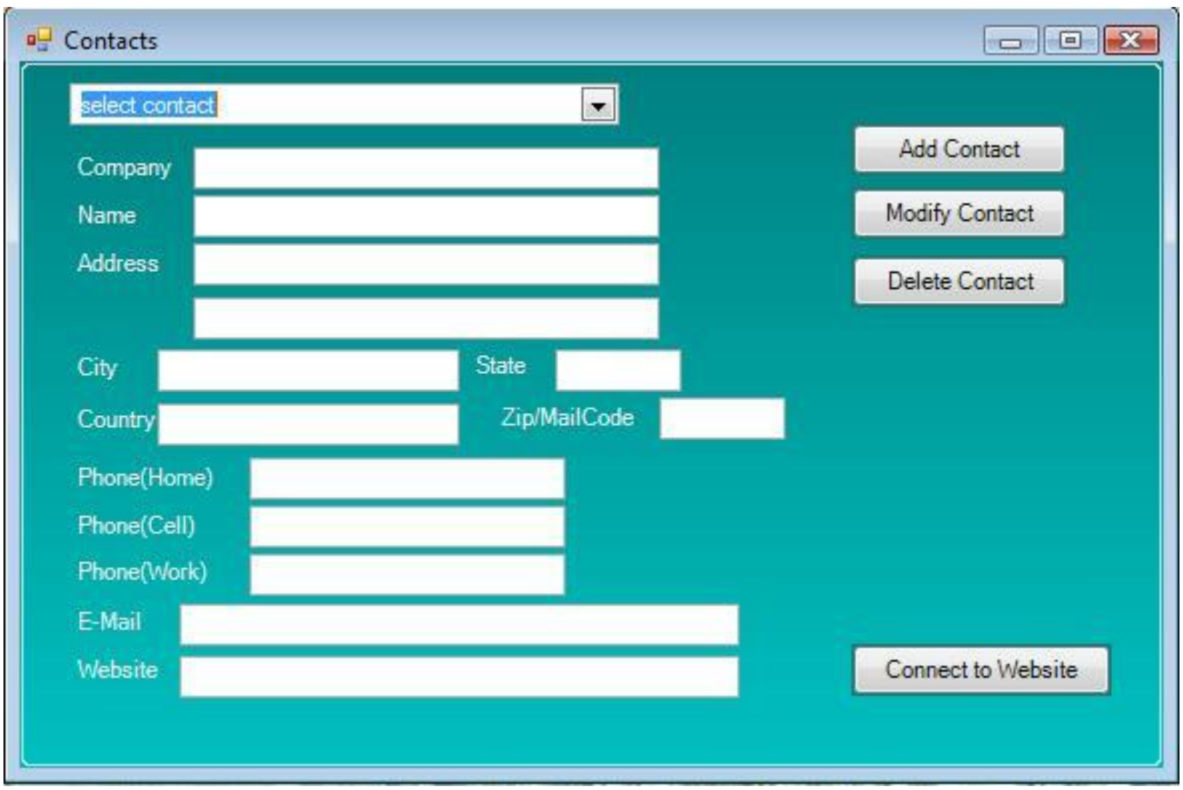
Some highly sophisticated users may wish to create user data folders in other locations. There is a procedure to allow for this with the understanding that the user will then need to backup such folders outside of the Collector's Assistant. The procedure below should only be used by users highly familiar with the creation and movement of folders using Windows My Computer

To create a new user with a folder on a different location, the following steps are required:

- *Enter the name for the new user (this will result in the working directory automatically generated under c:\CollectorAssistant*
- *Modify the working directory (for example by changing the drive from c: to d: and eliminating the portion of the path that is CollectorAssistant*
- *Click on Add New User*
- *Close the Collector's Assistant*
- *Move the subfolder that was added outside of the folder c:\CollectorAssistant\ to the intended location*
- *Start the Collector's Assistant, Select the new user and add your first collection. If you are not able to add a collection or see collections of other users listed, the connection the folder is not where expected. Make sure that the folder location corresponds exactly to the user working directory.*

Contacts

This section allows the user to maintain a database of useful contacts for their collecting interests. It is preloaded with a small number of industry sites. If web URL's are provided, you may directly display a website from within the Collector's Assistant by selecting the contact and clicking on the Connect to Website button. Use of the internet feature assumes the availability of Internet Explorer which is not installed by the Collector's Assistant installation.

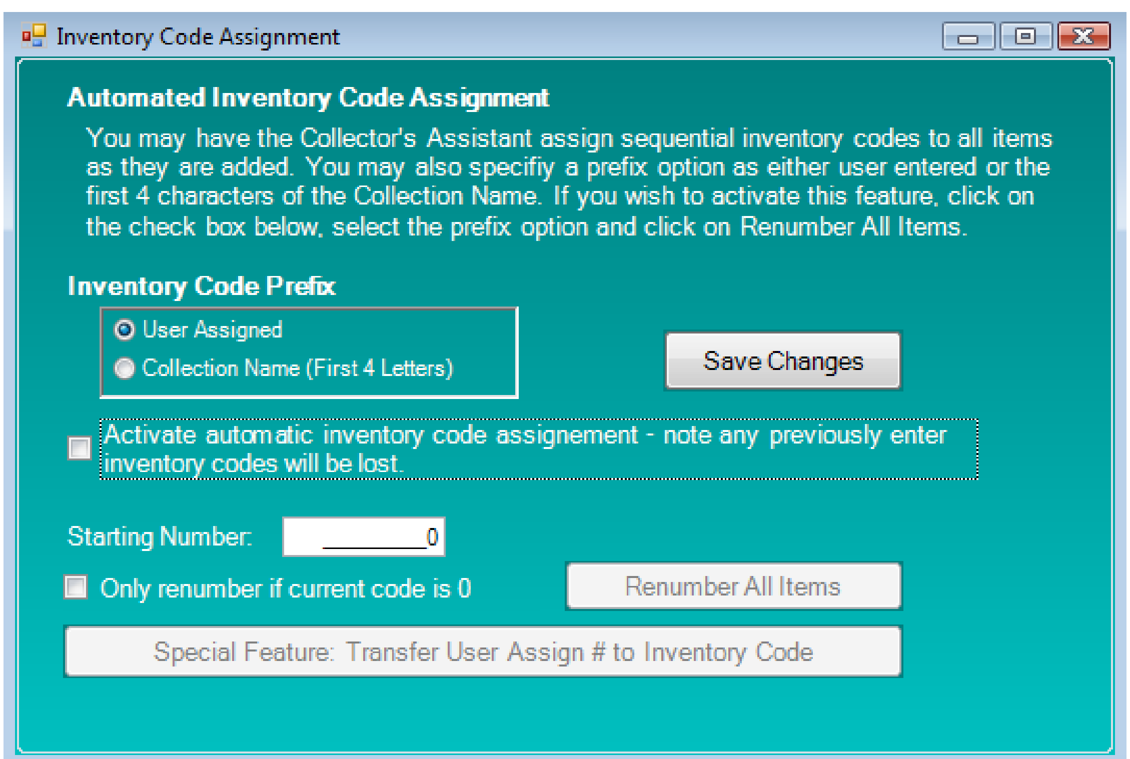


Inventory Code Number Assignment

Some users may wish to have the Collector's Assistant assign a unique number to each item in all collections. In this preference section, you may activate this autonumbering feature, while specifying the following options:

- Starting number – on activation, all existing items in all collections will be assigned a number, starting at the user specified values. Once this code is activated, newly added items will be assigned the next number in sequence.
- Prefix – the user may have no prefix, enter a manual prefix for each item, or have the Collector's Assistant automatically prefix the inventory code with the first four letters of the collection in which the item is located.

Note – once assigned numbers are not re-assignable, except for entry into the User Assign # field and use of the Transfer button. This feature provides a means by which a user may force the inventory code number of existing items by entering the desired values in the User Assign # field and clicking on Special Feature: Transfer User Assign # to Inventory Code. (note there is no checking for duplication or any other user errors). Deleted items will not result in reuse of the original numbers.



Data Entry Screen Customization

Using this facility, the data entry screens for a collectible may be completely customized. This is an advanced facility which requires some degree of comfortability with computers and software. For customers wishing to customize their screens who do not feel comfortable with computers, Carlisle Development offers a low cost customization service where many typical requests can be fulfilled for less than $25.

If you are running Version 8.1.3 or later, whenever the Data Entry Customizer starts it is in safe mode. In this mode the Modify Field and Delete Field buttons are disabled. While in this mode you may safely:

- Reposition fields by dragging their labels around
- Increase or decrease the distance between a label and the field to which it is attached
- Add/Delete/Relocate/Resize pictures
- Move fields between the first three tabs (Item Detail, More Detail and Buy and Sell
- Add new fields

You may leave Save Mode by unchecking the Safe Mode checkbox. This will activate the Modify Field and Delete Field buttons. IMPORTANT – You must not delete or modify fields provided as a part of the standard Carlisle Development interface. If you do not wish to use some of these fields, it is recommended that you drag them to the bottom of one of the tabs below the area that is normally visible. This can be accomplished by temporarily bring up the horizontal splitter exposing more of the tab, moving unwanted fields there and then restoring the splitter to its normal location.

Using the Customizer, you can:

- Add new information fields
- Reposition information fields
- Relocated information fields to other tabs
- Incorporate images on a tab
- Set the sort algorithm used for an information field
- Specify if an information field is included as a search parameter

- Specify if an information field is allowed for data entry while copying from the standard database

What defines an information field?

Each information field has several characteristics which must be defined:

- Field Label – this is the label to the left of the field which is also used in column heading, searches, etc.
- Type of Data – this is used to connect the information field to a portion of our database appropriate to the type of information to be stored. Available types include:
  - Strings of various sizes from 8-1024 suitable for all alphanumeric data
  - Integers
  - Currency – used for floating point numbers as wel
  - Date
  - Boolean – used for checkboxes
  - Calculated – fields which are populated based on a calculation of up to 4 other fields
- Data Entry Object – the type of control used to enter data
  - Textbox – suitable for all data entry
  - Choice List – provides for choices which are automatically or manually generated
  - Checkbox
  - Choice List-Linked, a choice list whose choices are dependent on the selection of a parent choice list
- Sort Type – For searches and sorts, this defines the sorting algorithm. Available choices are:
  - Alphabetic
  - Numeric
  - Assigned Value (for choice lists)
  - Special AD/BC – dating algorithm aware of AD/BC nuances
  - Special – US Coin Mint Mark – sorts based on common practice where both blank and “P” are recognized as Philadelphia and precede all other mints
  - Special – Mixed AlphaNumeric – sorts based on the numerical content of a mixed field. For example A100B would be assigned the value 100 for sort purposes

- Special –Grades – an algorithm specific to US Coin Grading
- Display Format – used for numerical fields
- Tab Assignment – fields may be placed on any of the available tabs
  - Item Detail – primary tab
  - More Detail – secondary tab
  - Buy/Sell – tab focused on transaction fields
  - Note – a large note
  - Estate – Estate planning fields

Common Customization operations

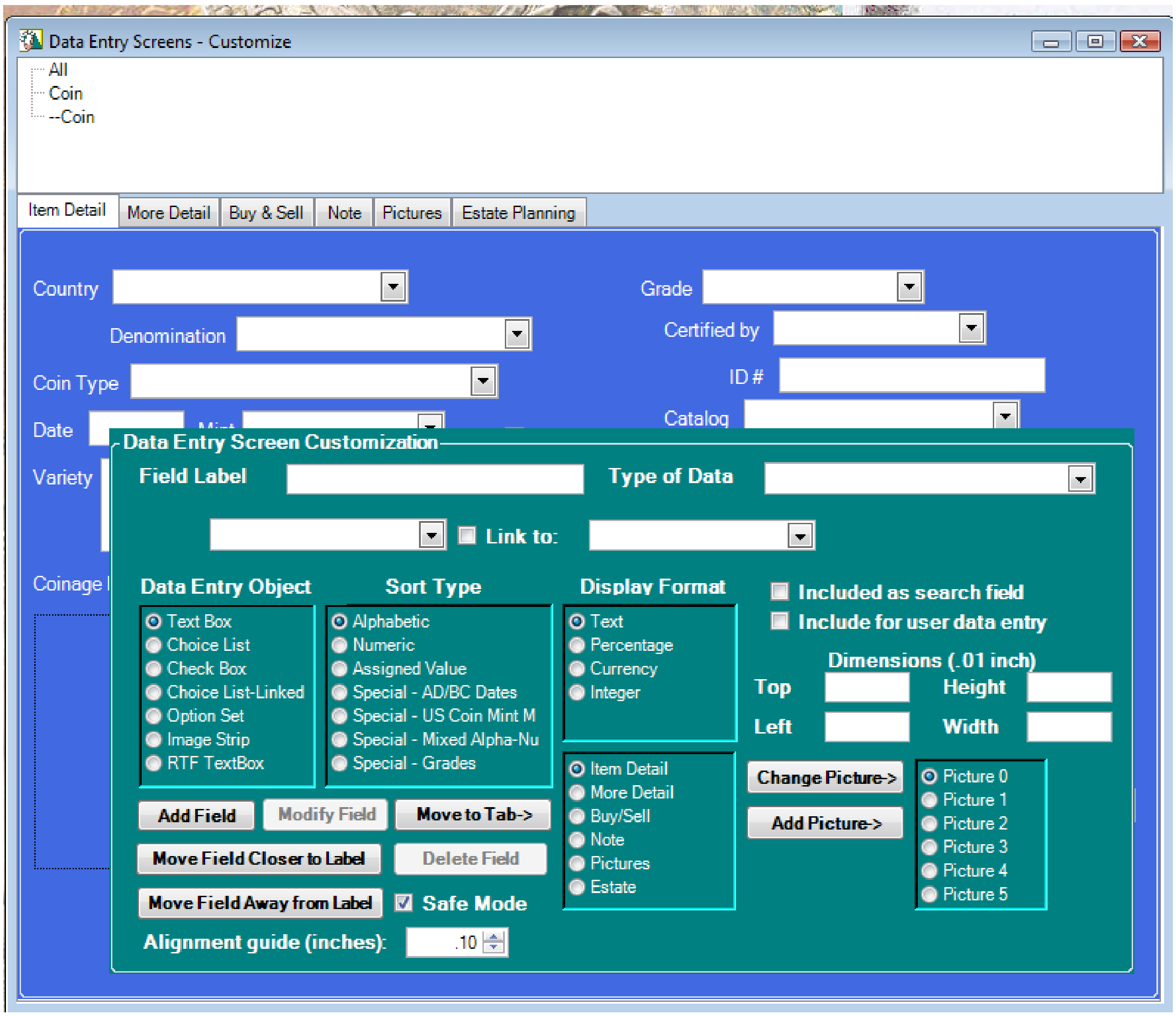
Note – for all move operations, you may specify a grid in inches (for example .10) to which all items will be aligned

- Reposition a field on its existing tab – click down on the label and drag it around. Let the mouse button up when you reach the desired position
- Relocate a field to another tab
  - Select the field by clicking on its label – the customizer should be populated with its information. Select the desired tab in the option button and then click on Move to Tab. (Note after moving, you will likely need to reposition some of the fields on the destination tab.
- Select the tab to customize by clicking on it normally
- Add a field by populating the form and then clicking on Add Field. The field will be added to the currently selected tab, placed in the middle, sometimes behind other fields. After addition it will be necessary to reposition the field and perhaps other fields as well.
- Delete a field, by clicking on its label and clicking on Delete Field. This operation should not be used for fields which contain data.
- Modify a field by selecting it, modifying its settings and clicking on Modify Field. NOTE – if you change the Type of Data, any existing collection data in this field will be lost.

Advanced Operations

- Calculated fields – these fields require specification of the algorithm to be used. Each algorithm is a mathematical calculation incorporating 1 to 4 other fields and operations such as "+", "-",”*” and "\". The user may not enter data directly into these fields. Note – any fields used for calculations must already exist. Also, if you modify these fields, you will need to redefine the calculated field.

- Pictures - you may place up to 6 pictures across the tabs.

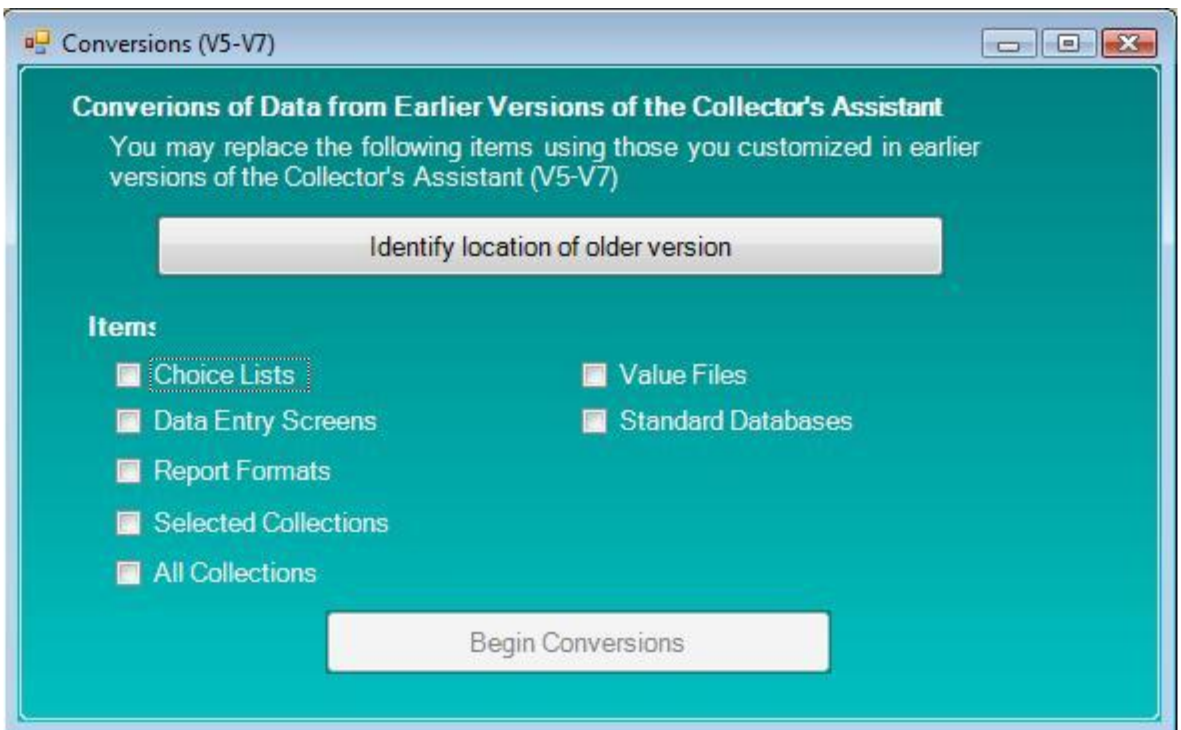


Conversions (V5-V7)

This section is used for more precise control of conversion of data from earlier versions and is not necessary for most users. The first time version 8 is run, it will search for older versions and if found, automatically convert their data.

For users with special conversion requirements, this section allows for individual conversion of:

- Choice Lists – On installation, the Collector's Assistant populates the standard Carlisle Development choice lists. If a user prefers to bring theirs forward from earlier versions, this function will bring them into V8
- Data Entry Screens – if the user has added data entry screens for new collectibles or customized data entry screens, this function will bring these into V8, overriding those supplied by Carlisle Development.
- Report Formats – override Carlisle's standards
- Selected Collection – if you wish to manually convert a single collection
- All Collections – used to convert collections not found on initial running of V8
- Value files – brings in old value files – not normally needed
- Standard Databases

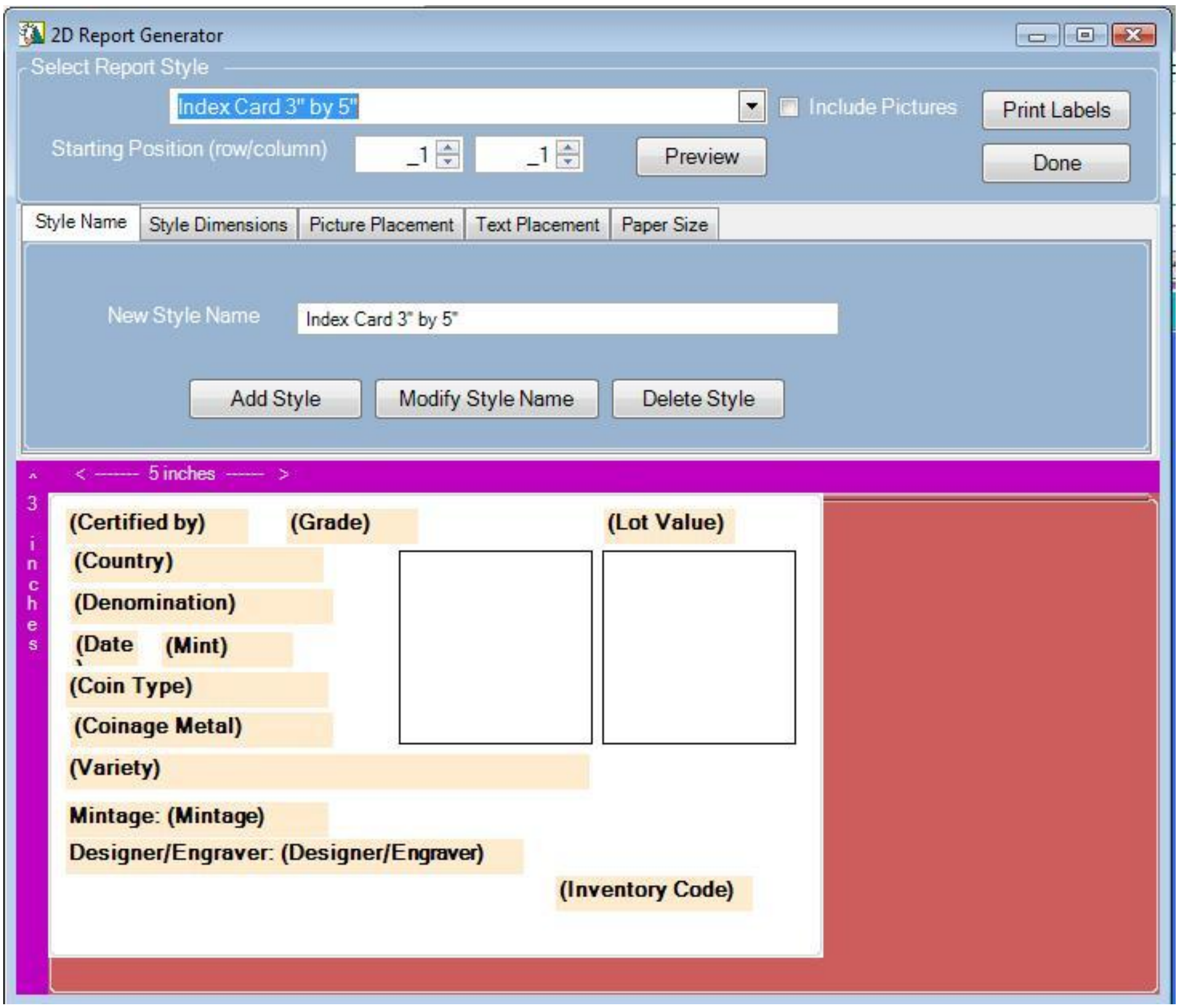


Chapter 7: Specialized Printed Reports

The Collector's Assistant contains a second report generator for reports other than columnar listings. This is used for such formats as flip inserts, index cards, multiline reports and picture catalogs.

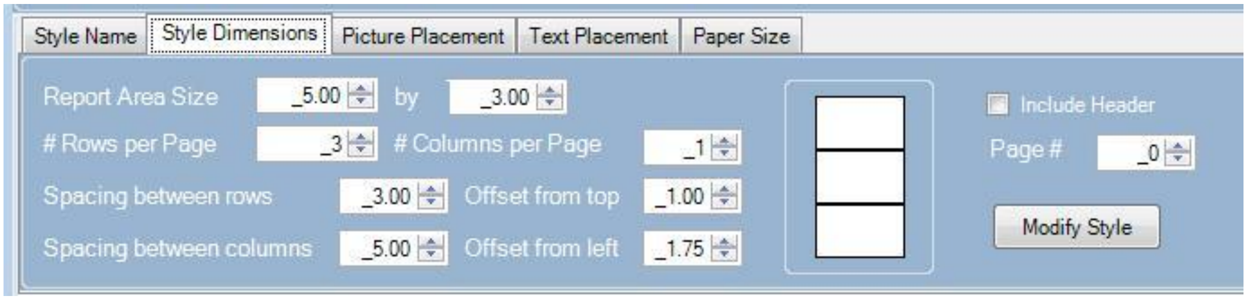
Each sheet of paper is divided into a number of rows and columns consisting of rectangular areas. Within each rectangular area, the information on one item will be presented. This area can contain any information fields as well as pictures.

The definition of a report format is referred to as a Style. A number of predefined Styles have been provided for common output media.



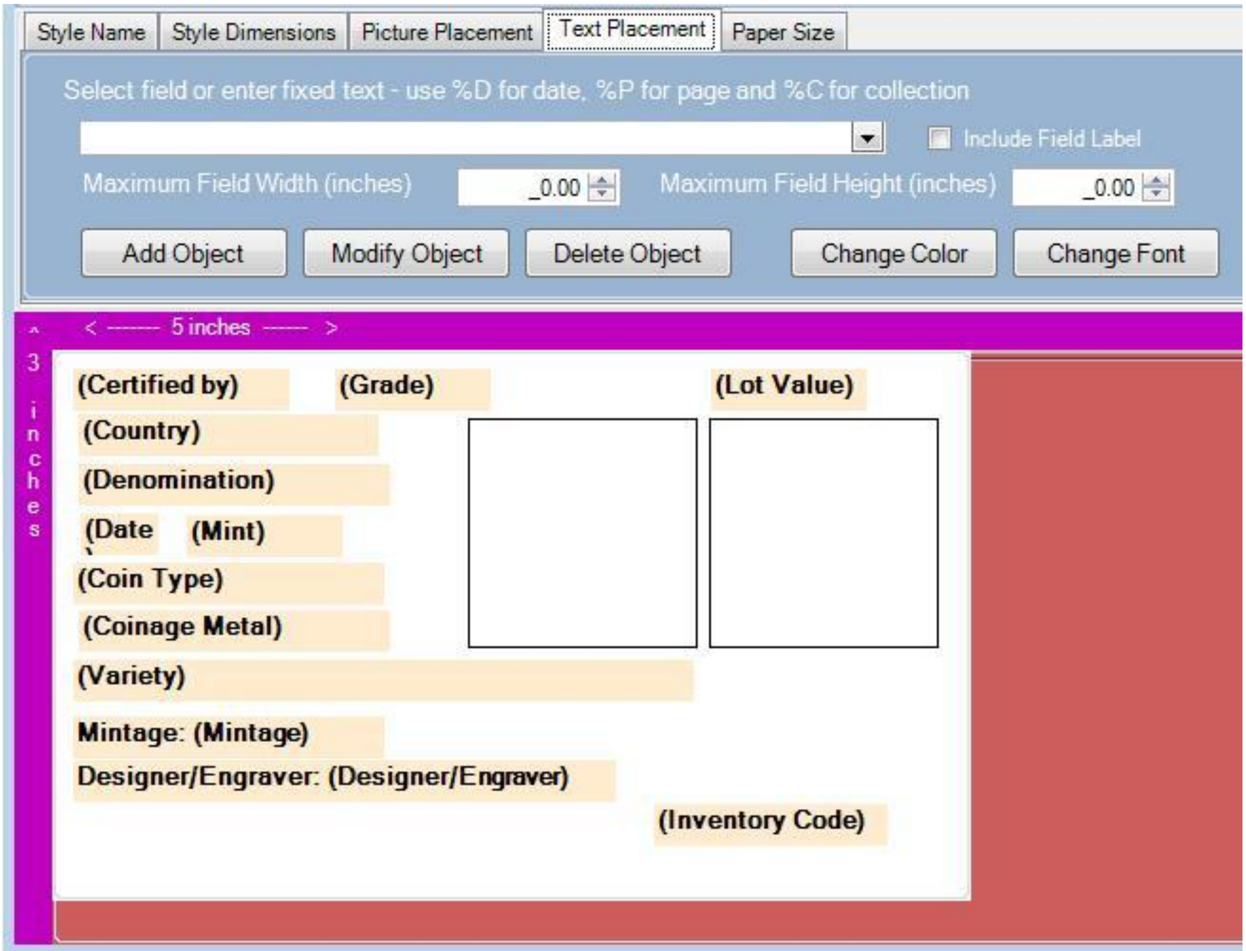
A report style defines both the content of a rectangular area as well as the layout of rectangular area on a larger paper format.

For example, a standard 8 ½ by 11” format consisting of three preperforated 5” by 3” index cards is one of the styles provided for most collectibles. Other examples are flip inserts, labels and picture catalog pages.



In the example shown there are 3 rows per page consisting of 1 column. The offsets and dimensions are specified in inches.

Once a style is defined, the rectangular area can be populated with any of the information fields and/or images for the current collectible.



The text placement tab allows the user to add information fields and alter the amount of space on the style to which any data will be limited. Fields may be repositioned by dragging their labels around.

Two kinds of objects can be added to this style, information fields (with or without their labels) and static text. Each object may be selected allowing the user to modify its font, color, width and height. A colored box shows the extent of the object, when presenting real data, any text outside of the box will be truncated.

Chapter 8: Customizing Data Entry Screens

The Collector's Assistant allows the user to customize the data entry folders used to enter information about an individual item. For each collectible the information fields are organized onto 3 tabs (Item Detail, More Detail and Buy/Sell). These tabs are completely customizable, though changes must be made with some care as data can be disconnected.

It is recommended that data entry screens be customized prior to the entry of major amounts of data. Also, prior to customization, a backup should be generated in the event it is necessary to undo the effects of an errant customization.

What can be customized?

- Location of information fields on tabbed folders
- Moving a field from one tab to another
- Deleting an existing field
- Changing the label, width, etc of an existing field
- Adding new information fields
- Defining the data type (string, numeric, date) of an information field
- Defining the display format of an information field

What customizations should be avoided?

- Modifying field populated by a standard database other then simple relocation onto another tab or repositioning on the current tab
- Changing the data type of a field which already contains user data as this data will be disconnected

What does the customization process actually do?

- The Collector's Assistant contains a large set of generic information fields. The Data Entry screen contains objects such as choice lists, check boxes, and text boxes which allow the user to enter information.
- The process of customization creates data entry elements and associates them permanently with a field in the database.

Customizing Data Entry Screens – Relocate or Reposition

To move an information field during the customization process, right click on its label and drag it around then let go of the mouse when you reach the desired location

To move an information field to another tab:

- Click on the label of the field to select it (its information will field the customizer)
- Select the tab to which it will be moved in the dropdown provided
- Click on the Move button
- Click on the tab to which the item was moved and reposition by dragging its label around

Customizing Data - Adding a New Field

Select the tab to which the item will be added

- Fill out the form:
  - Field Label (name of the field)
  - Type of Data (string of x characters, integer, date, etc)
  - Data Entry Object
    - Text Box – used for entry of all kinds of data
    - Choice List – user selects from predefined choices
    - Check Box – Used with type of data Boolean
    - Choice List-Linked – a choice list whose contents depend on the choice of a parent list
    - Option Set - a group of choices
  - Sort Type – selects among available sort algorithms
  - Display Format
  - Included as search field – adds this field to those available to the search function

- Click on Add Field (the field will be added to the center of the tab)
- Reposition the field by dragging the label around (if the field is not visible, it may be obscured by a large existing field occupying the center of the tab, you may need to relocate that field first)

Customizing Data - Changing the distance between label and associated entry object

Select the data entry object by clicking on its label

Click on either Move Field Closer to Label or Move Label Away from Field as desired. Each movement is about .1 inch.

Chapter 9: Backup and Moving to a New Computer

Clicking on File->Backup will display the backup and restore window. This window accesses four functions:

- Backup – all customer data is copied into a user specified destination drive and folder’
- Prepare for Move to Another Computer – packages all files, both program and data necessary to move to another computer in a way such that no additional updates will be needed and copies the package to portable media such as a memory stick or flash drive (1GB of free space is recommended on the portable media)
- Restore files from backup – used to copy individual collection files from a previously generated backup
- Load all files from another computer – this installs the prepackaged files onto a new computer, both programs and data.

Note: The Collector’s Assistant backup function will not overwrite a pre-existing backup. It is recommended that each time you do a backup you click on Make New Folder and enter a name that provides useful information regarding the backup such as Backup-May10-2010. Of course you may manually delete an earlier backup, however retaining old backups increases the likelihood that you will be able to recover from a data loss.

To use these functions:

- Click on Select Folder in which to place the backup which will bring up a file browser allowing you to select a destination.
- Select the function
- Click on Start Backup

Chapter 10: Collector Tools

The Collector’s Assistant includes a set of collector tools. Some are appropriate to all collectibles and some are specific to coin collecting.

Available tools include:

- Collection Analyzer (tabular and graphical presentation)
    - Buy/Sell Effectiveness - comparison of profitability as a function of seller
    - Want List – allows you to evaluate scenarios of acquiring wanted items given a budget limit
    - Storage/Insurance Risk – provides information regarding concentration of collectibles value as a function of location
    - History – provides summary trends of key collection data
- Grading Assistant – optional module separately purchased
- Coin image galleries
    - Coin Type Identification/Mint Mark Locator – displays all coins of a given denomination with a graphics overlay indicating mint mark location
    - Coin Variety Identification – displays magnified images of some common varieties (large date/small date, near, far, etc) with graphics overlays to point out the key features
    - Toned Coin Images – gallery of attractively toned images by type
- Estate Planning – allows you to set up your heirs and liquidation instructions as well as graphically view allocation by heir
- Insurance Planning – allows you to store blanket insurance information and also view individually insured items
- Survival Manual (only if installed)
    - Bullion Calculator
    - Crack-out Calculator
    - Grading Gallery
    - Grading History
    - Coin Viewing Animation
    - Image Gallery
- Top 100 Morgan (only of installed)
    - Varieties – displays the Top100 Morgan Varieties synchronized with the currently selected coin

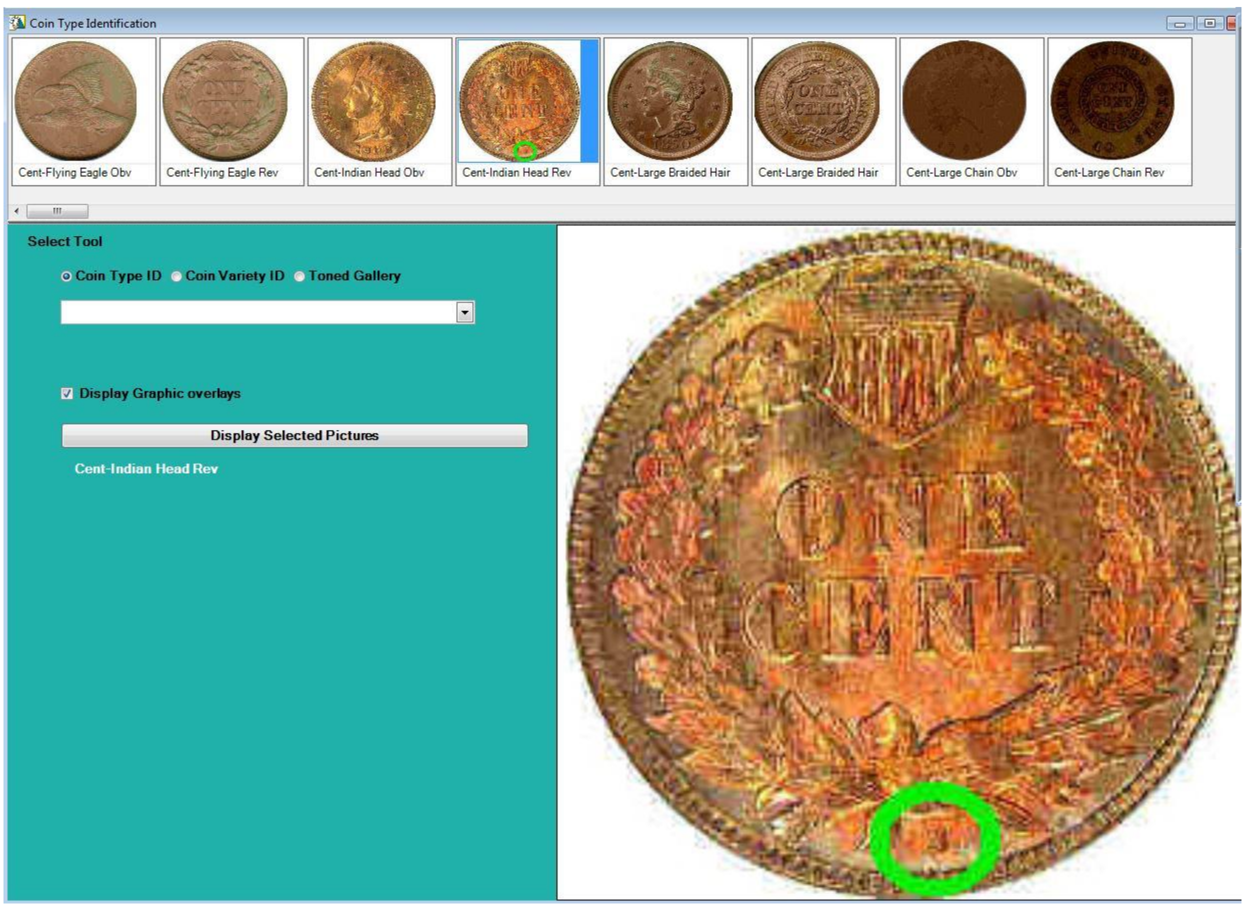
- Bullion Analyzer (only if installed) - this tool allows you to analyze the bullion content of your collection, view historical bullion performance and perform a variety of calculations relevant to bullion valuations.

Using the Collector Tools – Coin Image Galleries

Selecting any of these galleries will bring up an image viewing window with a strip across the top representing the selected image set.

You may magnify an image by selecting it which will place a copy in the larger box in the lower right portion of the window.

You may filter the displayed coins by selecting a denomination in the dropdown provided in which case, only the coins of the selected denomination will appear.



You can toggle the graphics overlay on/off by checking the checkbox labeled “Display Graphic Overlays”

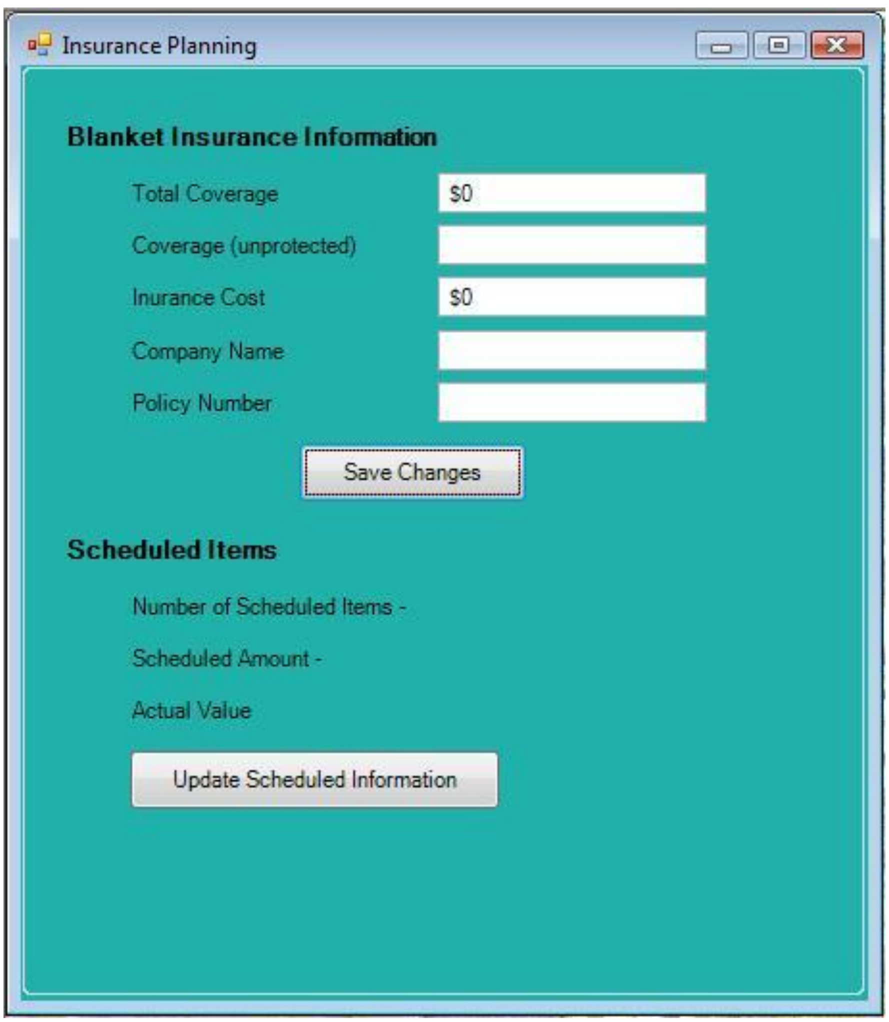
The option button allows you to move between the three galleries.

There is also a splitter bar between the image strip at the top and the controls at the bottom which may be adjusted.

Using the Collector Tools – Insurance Planning

Selecting this option will display a small window used to enter information about your insurance. You may enter and modify information about your insurance policy in the fields provided and then click on Save Changes.

To see the value and insurance amount of individually scheduled items, click on Update Scheduled Information. This will examine all items in all collections and total the values and insured values of all items with an insured value greater than 0.



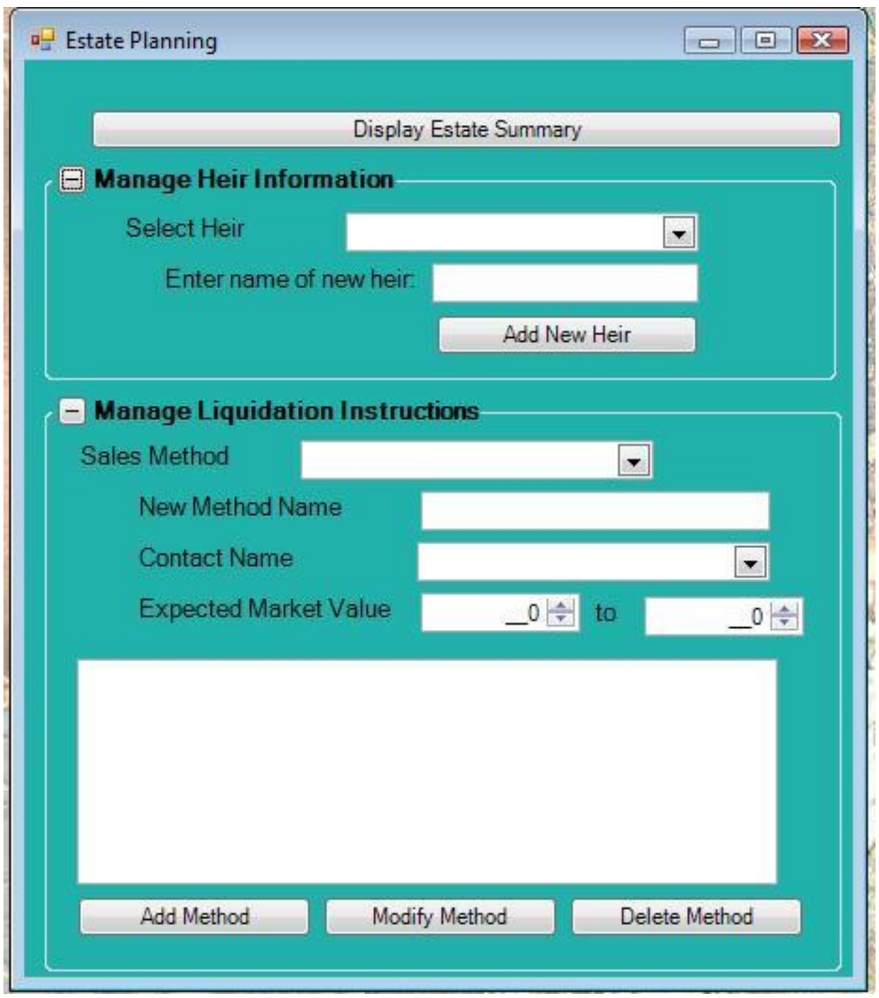
Using the Collector Tools – Estate Planning

The Estate Planning window provides controls to manage your heirs and provide guidance for liquidating your collection.

The top portion allows you to enter the names of your heirs, all of whom will appear on the dropdown on the estate planning tab.

The bottom portion allows you to enter disposition names and detailed instructions to be associated with items on the estate planning tab.

There is also a button Display Estate Summary which will display a table of heirs and allocated value which may then be graphed and printed as a pie chart.



Using the Collector Tools – Collection Analyzer

The collection analyzer tools provide you with information useful to evaluating your want list, storage risk and buying effectiveness. Data from across all items in all collections is aggregated to assist you.

Clicking on any if the analyzer tools will open an analysis window. Each analysis window contains a number of buttons and may contain some parameters to feed the analysis

Controls:

- Display Results – produces a table with the desired analysis incorporating parameters entered by the user
- Print – print the tabular results
- Graph Results – Displays another window with an appropriately selected graphic presentation of the tabular data.
- Analysis specific parameters
    - Want List
        - Budget – the amount of money available to purchase wanted items
        - What to display and in what order
    - Buy/Sell – no parameters
    - Storage
        - By Container or Location

Chapter 11: Report Composer

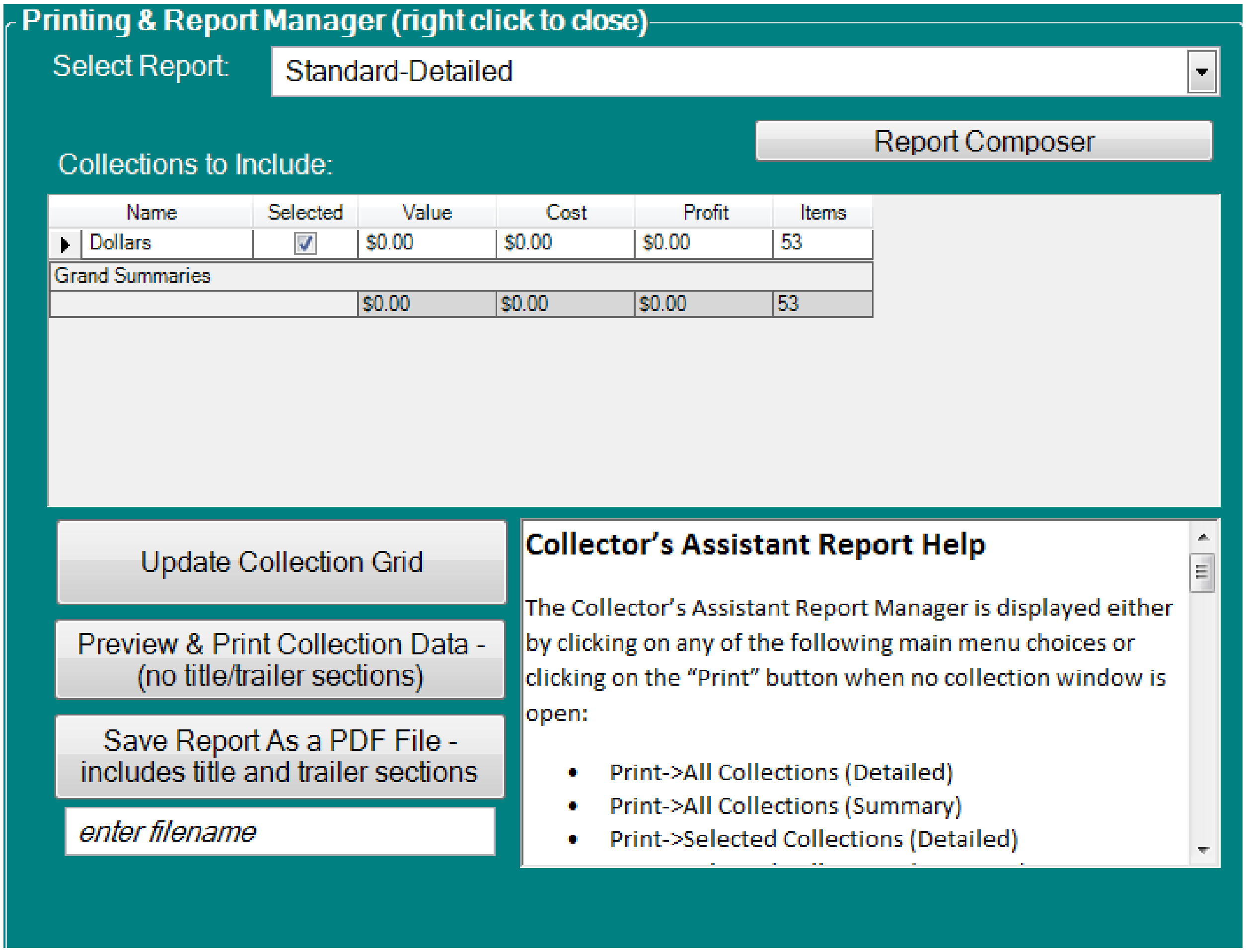
New to version 9 is the report composer. Enhancement of this feature will be a major focus of future versions.

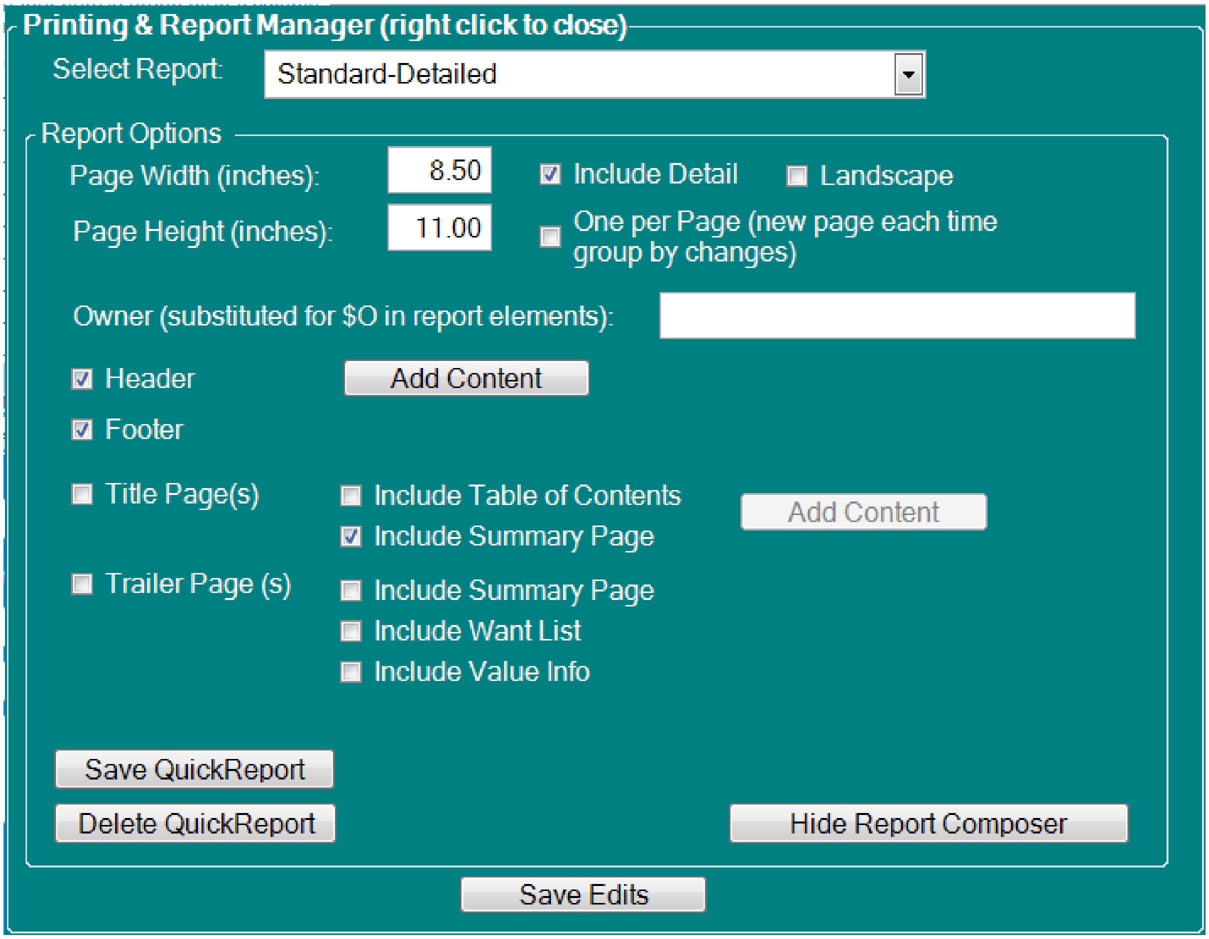
The Report Composer will appear either by clicking on any of the choices under the Print menu (other than Print->Current Collection) or if you click on the “Print” button at the top of the controls area, when no collection is open.

Clicking on any of the Print menu choices (All Collections or Selected Collections) will display the Printing and Report Manager. This may be used to select which collections will be included in the report and also to access the Report Composer. Clicking on Preview and Print Collection Data will display a preview window containing the selected data.

Clicking on Save Report as a PDF file will send the full output of the Report Composer to the filename specified and placed in the folder c:\CollectorAssistant\Reports\

Clicking on Report Composer will display the window allowing for user selection of reporting parameters.


Printing & Report Manager (right click to close)
Select Report:
Standard-Detailed
Report Composer
Collections to Include:
Name
Selected
Value
Cost
Profit
Items
Dollars
$0.00
$0.00
$0.00
53
Grand Summaries
$0.00
$0.00
$0.00
53
Update Collection Grid
Preview & Print Collection Data - (no title/trailer sections)
Save Report As a PDF File - includes title and trailer sections
enter filename
Collector's Assistant Report Help
The Collector's Assistant Report Manager is displayed either by clicking on any of the following main menu choices or clicking on the "Print" button when no collection window is open:
Print->All Collections (Detailed)
Print->All Collections (Summary)
Print->Selected Collections (Detailed)



The Report Composer allows the user to:

- Specify target page size
- Specify if detailed listings are included
- Specify landscape or portrait mode which is used for all portions of the report containing detailed listing grids
- Specify header and footer presence and content
- Specify content of title pages including presence of a Table of Contents and Summary Data
- Specify content of trailer pages including presence of summary data, want list and most valuable items list
- Specify if a new page will be used at the start of each collection for the primary detailed listings section of the report (Note-this will only function if you drag the column heading Collection to the group by area prior to generating the PDF file.

As mentioned the Report Composer will be an area of major enhancement for future release both through the addition of precanned reports and user defined sections, incorporating tables and graphs. We specifically welcome feedback with regard to additional report sections. Please contact support@carlisledevelopment.com with your ideas.

Chapter 12: Collectible-specific information (Coins, Paper Money, etc.)

- This section of the manual provide information specific to some of the more common collectibles for which the Collector's Assistant is used

Coins

Most information fields used on the standard data entry screens are self-explanatory, others are described here:

- Numismatic code – these may be used for any purpose but are commonly used for numbering systems employed for specific varieties (Breen, Judd, VAM's, etc)
- Date Range – the starting and last years a coin type was issued
- Certified By – certification company
- # - unique number assigned to a certified coin
- Catalog and #: some users make references to specialized coin catalogs for certain coins
- Inventory Code – used to enter or view a prefix to the automatic unique number assigned to each coin if this feature is activated

Coin Grade Designations

There are a variety of designations added to the end of coin grades which can greatly affect value. Common designations are:

- R, RB and B – used for color of copper coins (red, red-brown, and brown) – this designation is commonly needed for mint state issues
- DC and C – deep cameo and cameo used for many recent issues (note some certifiers use UltraCameo which is identical to Deep Cameo
- Varietal Designations such as F-full bell lines (Franklin Half Dollars)

Locating a coin in the database

Most circulating coins are easily located based on their denomination. For example; Nickel-Buffalo, Quarter-Statehood, etc. Special database categories include:

- Mint Sets, Proof Sets, and Prestige Sets – contain all annual government issued sets
- Bullion-Gold, Bullion-Silver and Bullion-Platinum – contain American Eagles, Gold Buffalo and UltraHighRelief St Gaudens
- Commemoratives and Commemoratives-Gold – Pre 1954 US Commemorative issues
- Commemorative Modern and Sets – US Commemoratives 1982 to the present. Commemorative Modern lists all coins individually. Commemorative Sets lists those items which are sold sets and represents an alternate way of cataloguing these items.

Coins – rolls and bags

The Collector's Assistant includes a special feature for handling rolls and bags. On the Item Detail tab, there is a field Units (Qty). This field contains such entries as Roll (40 coin) or Bag (1000 coin). If this field is not blank, the numerical portion is used as a value multiplier. For example, 3 50-coin rolls would be catalogued as Qty 3, Units of Qty Roll (50 coin). The Lot Value would be calculated as Qty * Numerical portion of Units of Qty * Unit Value.

Paper Money

Paper Money specific information fields which are not self-explanatory:

- Friedberg # - the standard numbering system used for identifying US Paper Money.

Chapter 13: Troubleshooting

The Collector's Assistant is designed to handle most unexpected error conditions. Should the Collector's Assistant behave in an unexpected way we would recommend the following steps:

For new installations, which have never worked properly after installation:

- Right click on the Collector's Assistant desktop icon
- Click on the Compatibility tab
- Check the box Run As Administrator
- Start the Collector's Assistant

If that does not resolve the issue, contact Carlisle Development Corp technical support using the contact information below.

For existing installations, which have previously been functioning

- Close the Collector's Assistant
- Restart the Collector's Assistant
- If the unexpected behavior no longer occurs, no further action is needed.
- If the unexpected behavior recurs, it is recommended that you contact Carlisle Development Corporation with a detailed description

Uninstallation/Re-installation is not recommended

Most unexpected behavior does not require reinstallation. This is usually a needless waste of your time. Prior to taking these steps it is recommended that you contact Carlisle Development technical support.

Further steps while awaiting a response from technical support

- Check to see if you are running the latest service pack
    - Click on Help->About. The exact version number and service pack level will be indicated. Visit the Carlisle website and verify that you are running the latest service pack and if not, install it.
    - You will also find a list of corrected defects
- View the FAQ section which may provide answers to your questions/issues

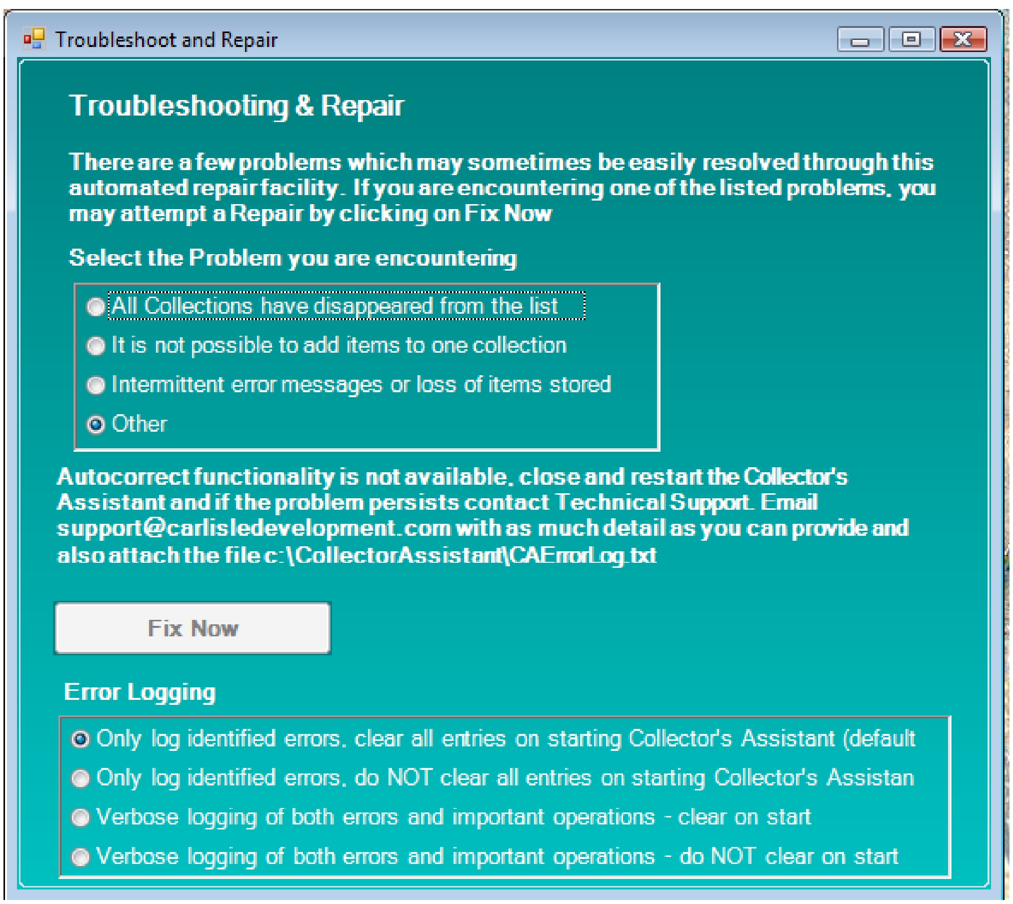
Auto Repair facility

Version 10 includes an automatic repair facility which can in some instances correct problems. It also provides checkboxes to produce additional diagnostic information which may be speed our ability to resolve a problem.

If you encounter a problem, click on Help->Auto Repair and see if your problem fits one of the three listed on the window that appears. If so click on Fix Now to see if the problem is resolved.

If not:

- Check one of the Verbose… settings under error logging
- Use the Collector's Assistant normally until the problem occurs
- Exit the Collector's Assistant
- Email the file c:\CollectorAssistant\CAErrorLog.txt to support@carlisledevelopment.com



Contacting Technical Support

Technical support may be requested via e-mail or telephone.

E-Mail Support

E-mail is the recommended method for obtaining technical support as responses are provided 7 days a week and it is the most effective way to communicate detailed information and provide corrections if needed. E-mail also eliminates issues caused by time zone differences.

E-mails should be sent to support@carlisledevelopment.com

Please describe your issue in detail as the more detailed description you provide, the more likely we can provide a targeted resolution in our initial response. E-mails without a detailed description result in a response requesting more information which delays the ultimate resolution of your issue. Also, for issues where a picture of what you are seeing may help, use the PrintScreen key on your keyboard to take a snapshot of your monitor which can be pasted into the e-mail or attached as a picture file.

Important – attach the file c:\CollectorAssistant\CAErrorlog.txt to your e-mail as it may contain information relevant to the problem.

Telephone Support (978-369-4908)

Telephone support is available from 9:00-5:00 EST Monday-Friday. In most instances you will reach a voice mail system. Please leave your name and telephone number along with information on your availability. We strive to return calls within 2 hours during our telephone support availability.

On request, we will try to accommodate scheduled calls at times other than our standard hours.

Appendix A – Altering the font size of the text on the tabbed folders

The text on all of the tabbed folders (labels on data entry fields and data entry fields themselves) is set to a point size of 10 and all of the screen designs are optimized for that size.

In Version 8.1.3, it is possible to adjust the font point size from 8 to 20, most typically to increase the text size. This is accomplished under the Colors choice under User Preferences. You can adjust the font size, Save Changes and then exit and restart the Collector's Assistant to have it take effect.

If you do increase the font size, it is likely that some of the labels will overlap with the fields to which they are attached and in some cases fields also may overlap.

If overlaps do occur, the data entry customizer must then be used (in Safe Mode) in order to reposition fields with adequate separation and also increase the distance between labels and their associated fields. This can usually be accomplished in a few minutes.

The required operations are found in the Data Entry Screen Customizer under User Preferences. After selecting a collectible in the tree, its data entry screens will display. You can then:

- Reposition a field by clicking down on its label and dragging it around
- Increase the separation between label and field by clicking on the label and then the button Move Field Away from Label

Appendix B – Requirements for bullion value calculations

Bullion values will be calculated for all items meeting the following criteria:

Coinage Metal field:

- Begin with Gold, Silver, Platinum or Palladium followed by fineness specified numerically. All of the following would work:
    - Silver .92
    - Gold 0.999
    - Platinum .95
    - Gold .999 Pure – Pure would be ignored

Weight:

- Begin with numerical value followed by word beginning with “o” or “O” for ounce and “g” or “G” for gram. All of the following would work:
    - 1 oz
    - 1.0 ounce
    - 1 O
    - 1g
    - 43.2Grams
    - 13.2gr