

Collector's Assistant for the Mac User Manual

Version 5.0

Updated June 1, 2023

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Whats New in Version 5

New features and enhancements

Functionality additions incorporated in version 5 are a direct result of feedback received from our user community in response to a survey of version 1, 2,3 and version 4 users.

New features and enhancements

- Bullion Analyzer functionality now included in Collector's Assistant
- Export to Windows version of Collector's Assistant
- Move collections between groups
- Keyboard commands for cop/paste text and print
- Improved picture attachment
- 2023 US Coin Listings and Values
- Modify All - multiple coin editing for selected fields
- Significantly improved main screen enhances user experience for both new and experienced users
- Robust ability to undo inadvertent deletion of a collection
- Additional tooltips and user help
- Additional total options

With the release of version 5 we now believe we have a robust offering on the Mac OS/X platform and future enhancements will be largely driven by customer feedback. We welcome your feedback and suggestions as user feedback is our starting point for establishing user interface priorities. Please email your suggestions to support@carlisledevelopment.com

Introduction & Organization of the Manual

This manual is organized into the following sections:

- Getting Started - addresses terminology used in this manual and the few basic functions necessary to get started cataloguing your collection
- Basic Functions - functions that most users will want to use as their cataloguing process continues
- Advanced Functions
- Other Topics

In addition to this manual, there are several other sources of usage assistance including:

- How To help topics accessed from the Collector's Assistant Help Menu
- Tips & Techniques section of Carlisle website
- Frequently Asked Questions section of Carlisle website

If you are not able to find answers to your questions using the above resources, contact technical support via email: support@carlisledevelopment.com

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Section 1: Getting Started

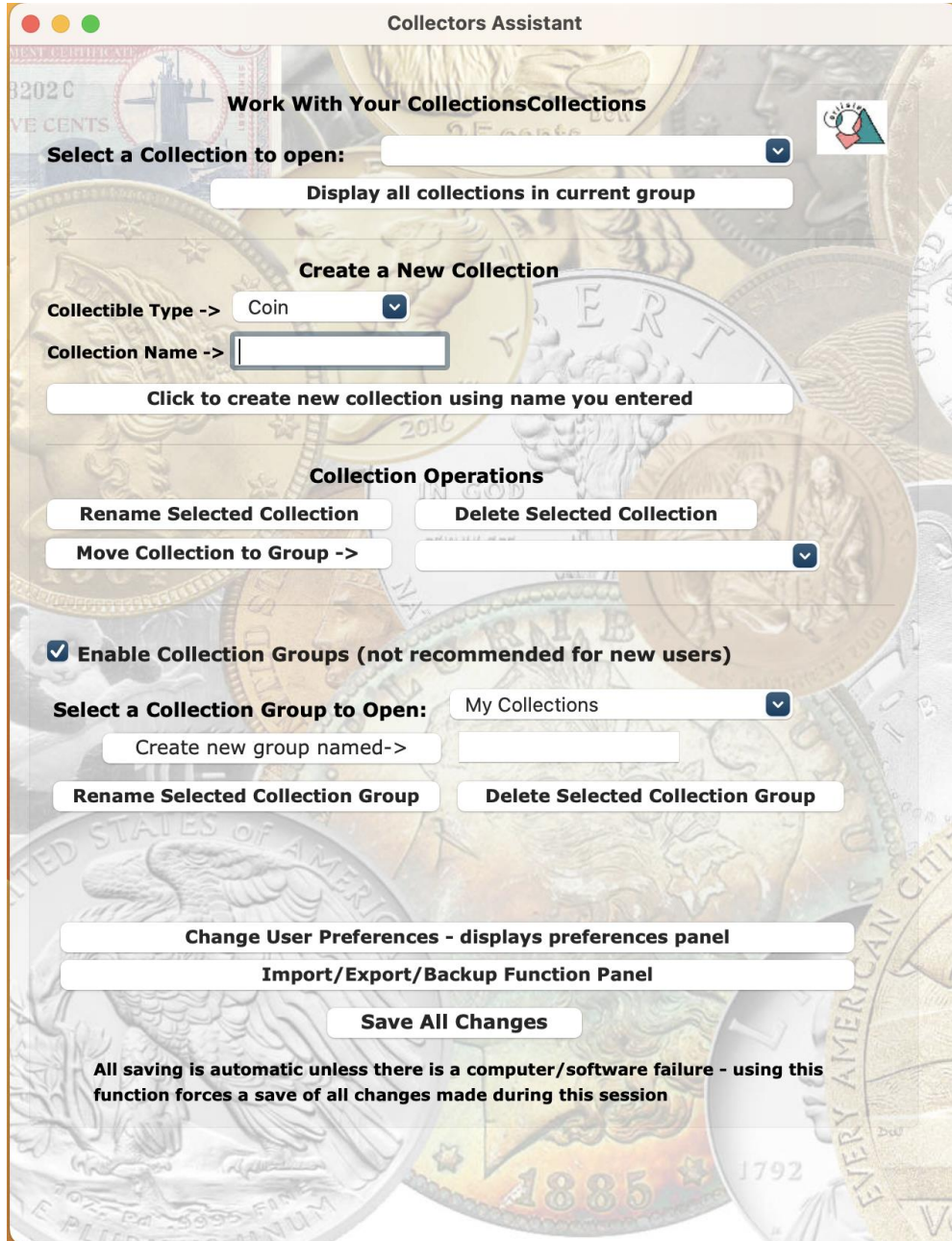
Section 1 includes 4 chapters:

- Chapter 1: Concepts and Terminology - very important information that you need to productively use Collector's Assistant and follow the remainder of this manual
- Chapter 2: Creating a collection
- Chapter 3: Adding coins to a collection
- Chapter 4: Editing information about a coin in your collection

The three basic functions covered in chapters 2-4 are all that is needed to catalog your coins. These should be mastered first.

Chapter 1: Concepts and Terminology

When the Collector's Assistant starts, the Collector's Assistant **controls area** (depicted below) always appears and remains accessible until the Collector's Assistant is closed.



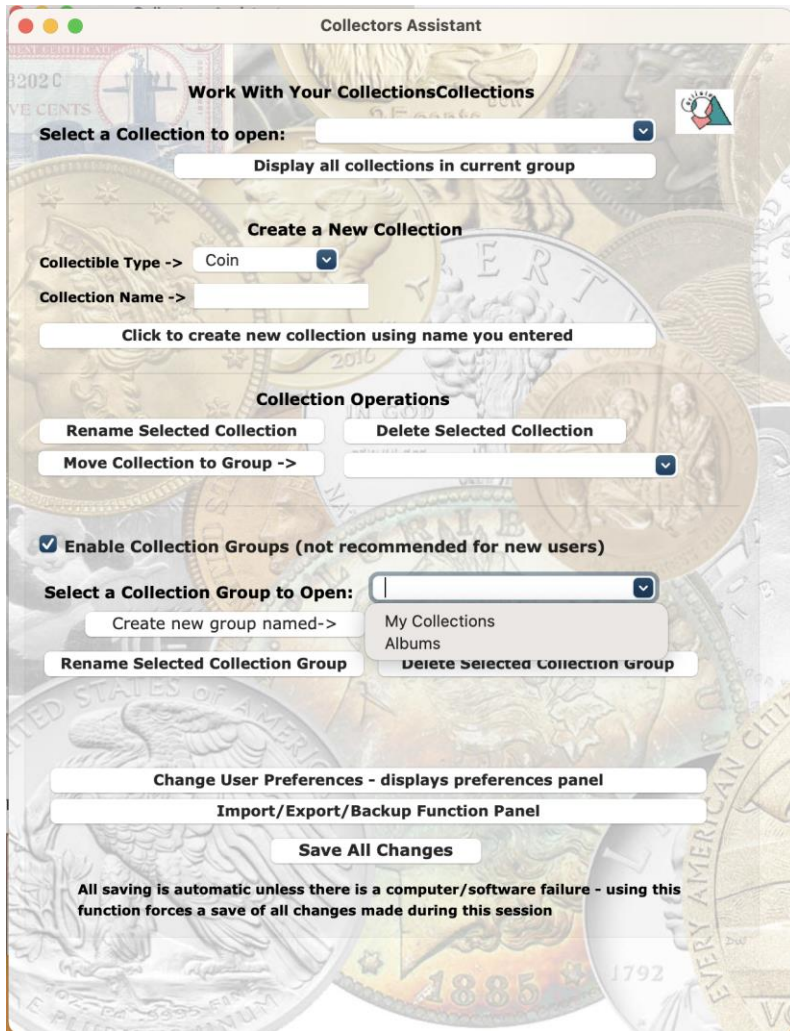
The controls area is used to access all of your collection data as well as perform

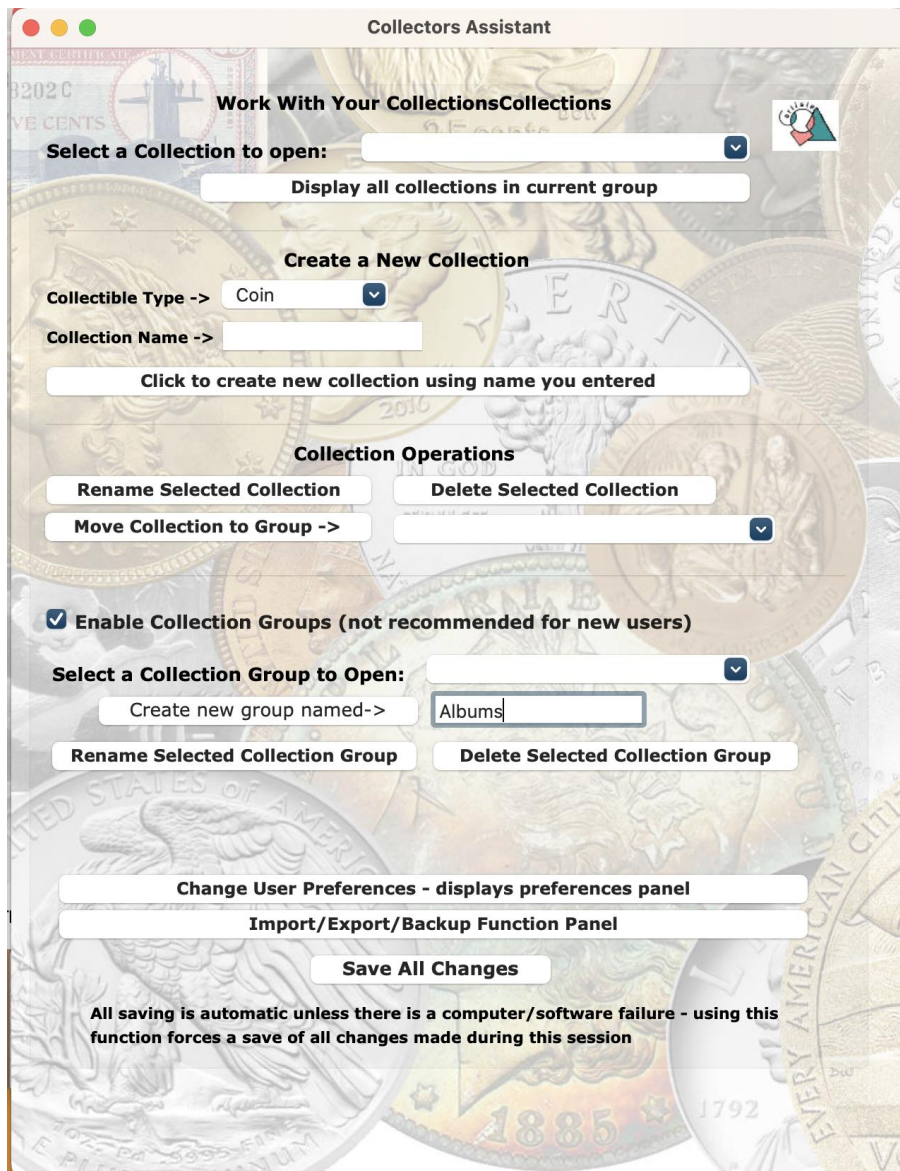
other administrative functions such as backups and setting user preferences.

It is divided into two sections, one for creating and selecting collections and collection groups and a second for additional operations which will be discussed in separate help sections.

The Collection Groups area is for advanced users and is initially hidden. It may be activated by checking the box "Enable Collection Groups". By default all collections are initially created in the collection group My Collections. After you are familiar with Collector's Assistant, you may want to employ Collection Groups in order to organize your collections. It is not recommended that new users activate this area.

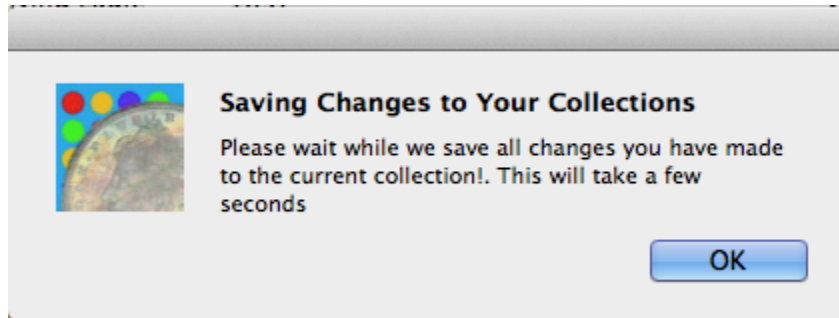
The illustration below illustrates the activation of Collection Groups and creation of a new group named Albums.





It also includes a “Save All Changes” button at the bottom. As you work with your data in Collector’s Assistant, edits are saved in real time to the memory of your MAC and also permanently to your disk drive. There are a few exceptions and clicking on Save All Changes will assure everything is saved when you conclude a session. The Collector’s Assistant automatically triggers a save to disk operation whenever you close a collection with pending changes and also when you try to exit the Collector’s Assistant normally. When these autosaves occur you will receive an alert message (depicted below) as it usually takes a few seconds for the

save operation to complete.



Collections and Collection Groups

All of your coins are stored in collections, which are intended to organize them into logical groupings that are easy to work with and consistent with how you collect. In some instances you will have many collections and wish to further organize them into Collection Groups. On installation, the Collector's Assistant has one Collection Group named "My Collections"

When you start the cataloguing of your collection it is a good idea to give some thought as to how you would like to organize it.

For example, your collection might consist of a group of coin albums which house individual coin types, several boxes of certified coins and a container of silver bullion items as well as a separate collection of World Coins.

For such a collection, you might create a Collection Group named "Coin Albums" and create a new collection for each album with a name that corresponds to the name on the album. You might create a second collection group named Certified Coins with appropriate collections, a third collection group named Other which contained collections named "World Coins" and "Silver Bullion"

Once you have created your initial collection(s), you are then ready to start adding coins, which is covered in a separate help topic.

Once a collection exists it will appear in the "Select a Collection to open" dropdown and may be opened by clicking on it. You may also display a window containing all coins in all collections in the current collection group by clicking on the button

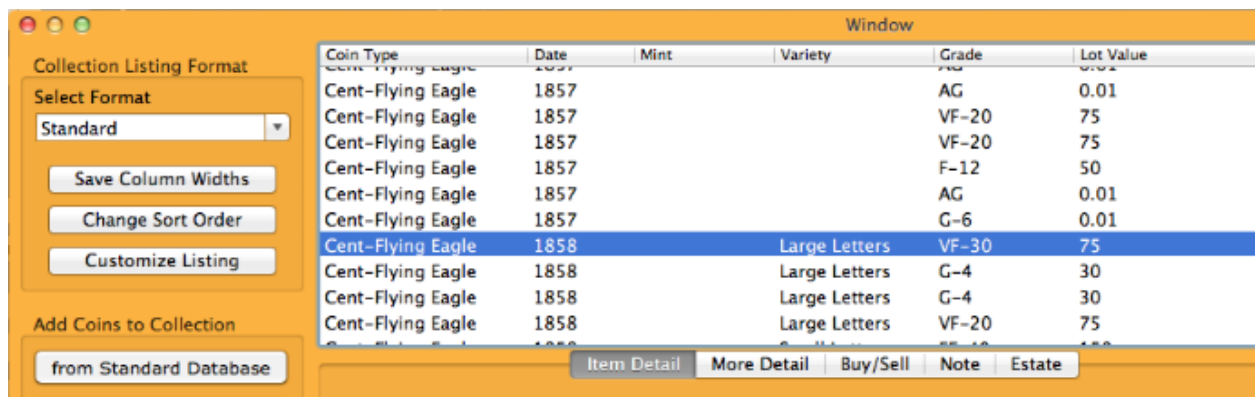
"Display all collections in current group".

Glossary of Terms used in Collector's Assistant

Collector's Assistant - Controls Area - that is the screen depicted above used to access your collections

Collection Windows - the screen which displays when you select a collection to work with - initially with an orange background.

Collection Listing Grid - the top portion of the Collection Window which lists all coins in the current collection.



The screenshot shows a software window titled "Window" with an orange background. On the left, there are two control panels. The top panel, "Collection Listing Format", includes a "Select Format" dropdown menu set to "Standard", and three buttons: "Save Column Widths", "Change Sort Order", and "Customize Listing". The bottom panel, "Add Coins to Collection", has a button labeled "from Standard Database". The main area is a table with columns: "Coin Type", "Date", "Mint", "Variety", "Grade", and "Lot Value". The table contains 12 rows of data, with the 7th row highlighted in blue. At the bottom of the window, there are several tabs: "Item Detail", "More Detail", "Buy/Sell", "Note", and "Estate".

Coin Type	Date	Mint	Variety	Grade	Lot Value
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			F-12	50
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			G-6	0.01
Cent-Flying Eagle	1858		Large Letters	VF-30	75
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	VF-20	75
Cent-Flying Eagle	1858		Large Letters	VF-20	75

Tabbed Folders - the lower portion of the Collection Window which presents all detailed information for the currently selected coin and also where it may be edited.

This contains 5 tabs entitled Item Detail (shown below), More Detail, Buy/Sell, Note and Estate. To the right of the tabs is a table of grades and values.

The screenshot displays the 'Mercury Dimes' software interface. On the left, there are three main sections: 'Collection Listing Format' with options like 'Standard' and 'Save Column Widths'; 'Add Coins to Collection' with options like 'from Standard Database'; and 'Coin Operations' with buttons like 'Copy Selected Coin'. The main area features a table of coin data:

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00
Dime-Mercury	1919	D			\$0.00

Below the table are tabs for 'Item Detail', 'More Detail', 'Buy/Sell', 'Note', and 'Estate'. The 'Item Detail' tab is active, showing a form with fields for Country (United States), Denomination (0.1 Dollar), Coin Type (Dime-Mercury), Date (1917), Mint (D), Variety, Grade (EF-40), Certified By, ID #, Quantity (1), Unit Value (45), and Lot Value (45). There are also images of the coin.

One important feature of the grade table is that it can be used to populate the grade, unit value and calculated fields (lot value, profit). Click on a grade in the table will update those fields for the currently selected coin in your collection.

Window

Coin Type	Date	Mint	Variety	Grade	Lot Value
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			F-12	50
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			G-6	0.01
Cent-Flying Eagle	1858		Large Letters	AU-55	300
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	VF-20	75

Collection Listing Format
 Select Format: Standard
 Save Column Widths
 Change Sort Order
 Customize Listing


Add Coins to Collection
 from Standard Database
 from Manual Entry on tabs

Coin Operations
 Copy Selected Coin
 Delete Selected Coin
 Move Coin to Collection->
 Print Current Collection

Current Collection Totals
 Value: \$ 860.04
 Lots: 15
 Items: 15
 Cost: \$ 0.00
 Profit: \$ 860.04
 Update Totals

Item Detail More Detail Buy/Sell Note Estate

Country: United States
 Denomination: 0.01 Dollar
 Coin Type: Cent-Flying Eagle
 Date: 1858 Mint:
 Variety: Large Letters

Grade: AU-55
 Certified By: RFG
 ID #:

 Quantity: 1 Units (Qty): coin (1)
 Unit Value: 300 Manual Value
 Lot Value: 300
 Value Info: Note: value shown is for a lower grad
 Value Source: Coin World (low) Date: 2010

Grade	Value
C-4	30
VG-8	40
F-12	55
VF-20	70
EF-40	145
AU-50	250
AU-55	300
AU-58	375
MS-60	385
MS-62	575
MS-63	800
MS-64	1750
MS-65	4500
MS-66	7000
PF-60	4500
PF-62	7000
PF-63	7500
PF-64	14000
PF-65	27500
PF-66	42000

More Detail Tab (content shown below)

Item Detail	More Detail	Buy/Sell	Note	Estate
Empire	<input type="text"/>			
State	<input type="text"/>			
Ruler	<input type="text"/>			
Numismatic Code	<input type="text"/>			
Code 2	<input type="text"/>			
Date Range	<input type="text" value="1878"/> To <input type="text" value="1921"/>			
Catalog	<input type="text"/> # <input type="text"/>			
<input type="checkbox"/> Scarce	<input type="checkbox"/> Key			
<input type="checkbox"/> Part of Government Set				
Value Change	<input type="text" value="85"/>			
Bullion Value	<input type="text" value="27.055"/>			
Coin World Ask	<input type="text" value="27.055"/>			
CDN Ask/Bid	<input type="text" value="75"/> / <input type="text" value="82"/>			
Actual Weight	<input type="text"/>			
Detailed Condition	<input type="text"/>			
Pop-PCGS	<input type="text" value="0"/>			
Pop-NGC	<input type="text" value="0"/>			
Old Value	<input type="text"/>			

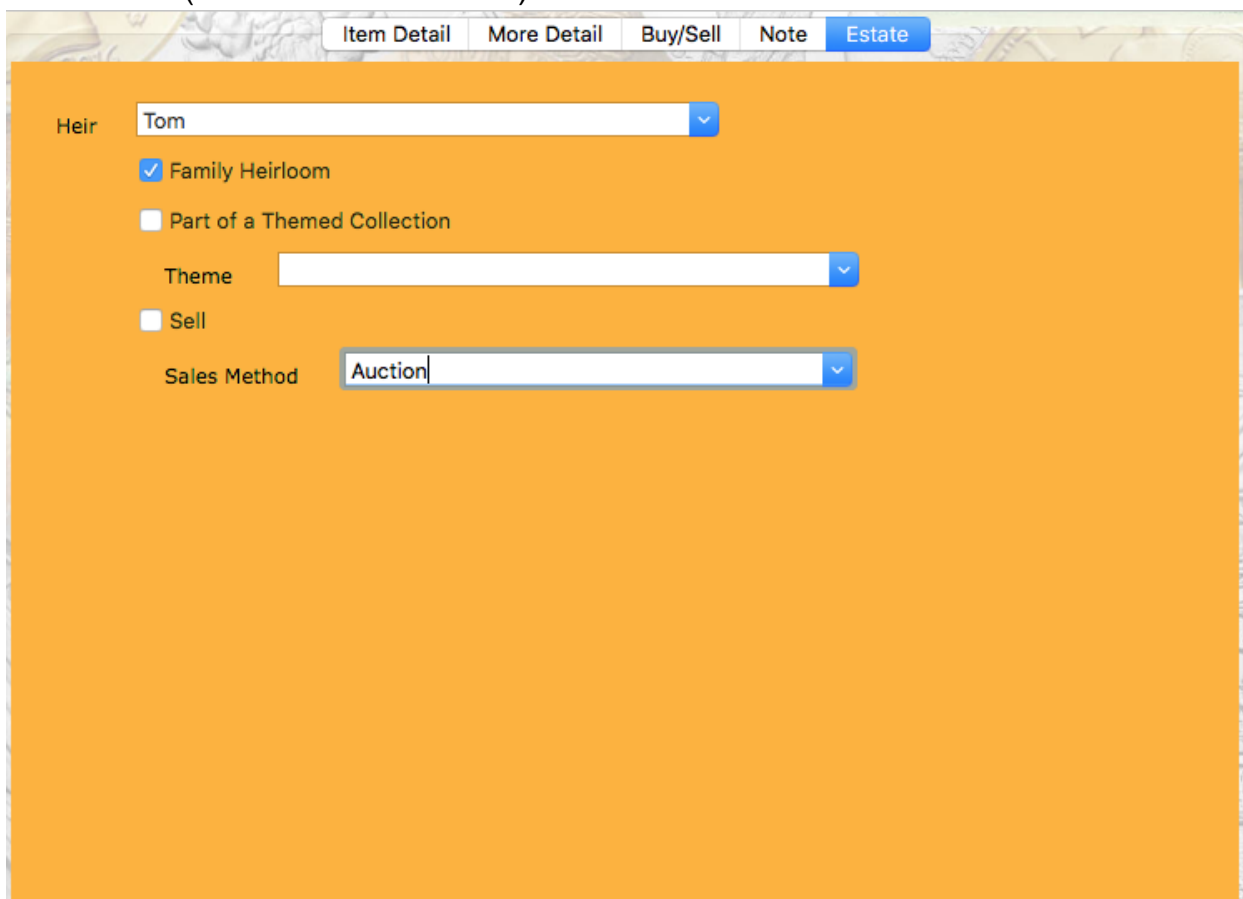
Buy/Sell tab (content shown below)

LIOR-Morgan 1885 MS-511 \$5000

Item Detail More Detail Buy/Sell Note Estate

Cost	100	Unique Coin ID	253583488
Seller	ABC Coins	Inventory Code	
Purchase Date	12/30/1899	Location	
Profit	-15	Container	
<input type="checkbox"/> Sold		Insured For	0
Sold Amount	0	User Assign #	0
Buyer			
Sale Date	12/30/1899		
Realized Profit	0		

Estate Tab (content shown below)



The screenshot shows a web interface with a navigation bar at the top containing tabs: "Item Detail", "More Detail", "Buy/Sell", "Note", and "Estate". The "Estate" tab is selected and highlighted in blue. Below the navigation bar is a large orange panel containing several controls:

- A label "Heir" followed by a dropdown menu showing "Tom".
- A checked checkbox labeled "Family Heirloom".
- An unchecked checkbox labeled "Part of a Themed Collection".
- A label "Theme" followed by an empty dropdown menu.
- An unchecked checkbox labeled "Sell".
- A label "Sales Method" followed by a dropdown menu showing "Auction".

VERY IMPORTANT - saving and protection of your data

As you work with your collection, adding coins and making edits, all changes are saved instantly to local memory and also to disk. We recommend periodically clicking on the "Save All Changes" button located at the bottom of the controls area. We would advise periodically clicking on it after a significant amount of changes are entered and also if you are leaving your computer unattended for a while.

VERY IMPORTANT - backup of your data

The Collector's Assistant provides two means of backing up up your data. Both may be directed to a location of your choosing. We strongly recommend use of a USB flash drive and discourage sole reliance on internet backups, clouds and or connected drives.

Backup - the backup function copies the entire database file in current use. This does not currently provide for restoration of individual collections, though it is

expected to support partial restoration in future updates. This will also backup any user attached images.

Export - the export outputs a csv file (comma separated text file) containing your collection data. It is possible to recover individual collections and records from this file. **WE VIEW THE EXPORT AS THE MOST ESSENTIAL BACKUP OF YOUR DATA.**

We recommend periodically generating both a full backup and collection export to a USB flash drive as the best means to guard against data loss.

VERY IMPORTANT - What to do if you encounter unexpected results

Do not uninstall and re-install the Collector's Assistant. Contact Carlisle Development Technical support for assistance. The best way is to send a detailed description of the problem via email to support@carlisledevelopment.com Emails are responded to 7 days per week during extended hours. The more detail you can provide the quicker your issue will be resolved.

You may also call 978-369-4908, however you will most likely need to leave a voice message and receive a callback. Generally calls are returned Monday-Friday 8:00-5:00 est.

Installation Keycode

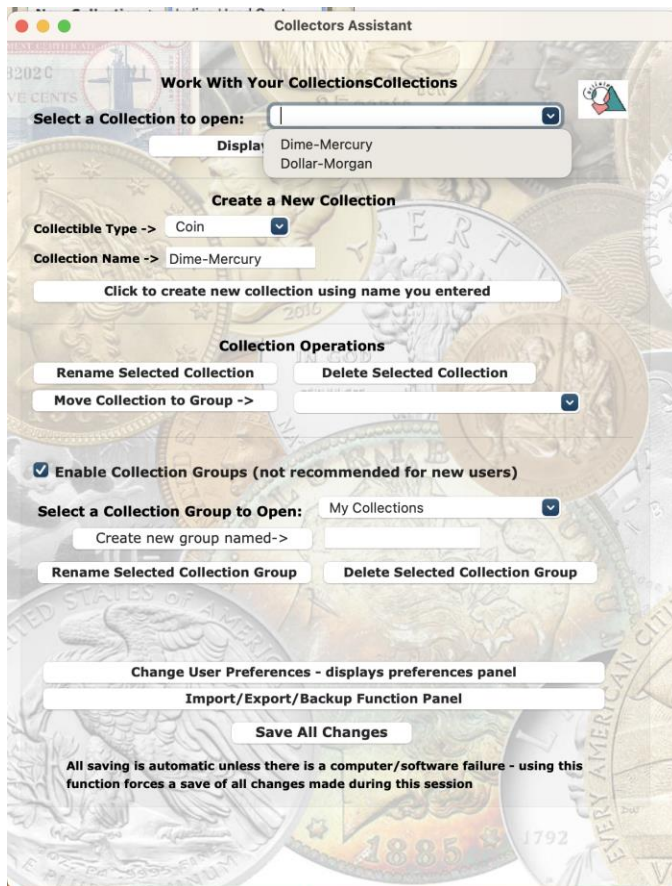
When you ran the Collector's Assistant for the first time, you had to enter your installation keycode supplied by Carlisle Development Corporation. This keycode determines what features are activated and available for use. In the initial release the only optional feature is the United States Paper Money database, but as the year progresses additional databases and add on functions will become available. If you purchase any of these new functions you will receive an updated keycode which may be entered by clicking on the Collector Assistant main menu choice followed by Enter New Activation Code on the submenu that appears.

Chapter 2: Creating a New Collection

In order to catalog your collectibles, you must create one or more collections. A collection is a container for items in your collection. Some users create one collection containing all items (for example US Coins) whereas others create many collections each housing a logically grouped subset (for example, Silver Dollars, Morgan Dollars, etc).

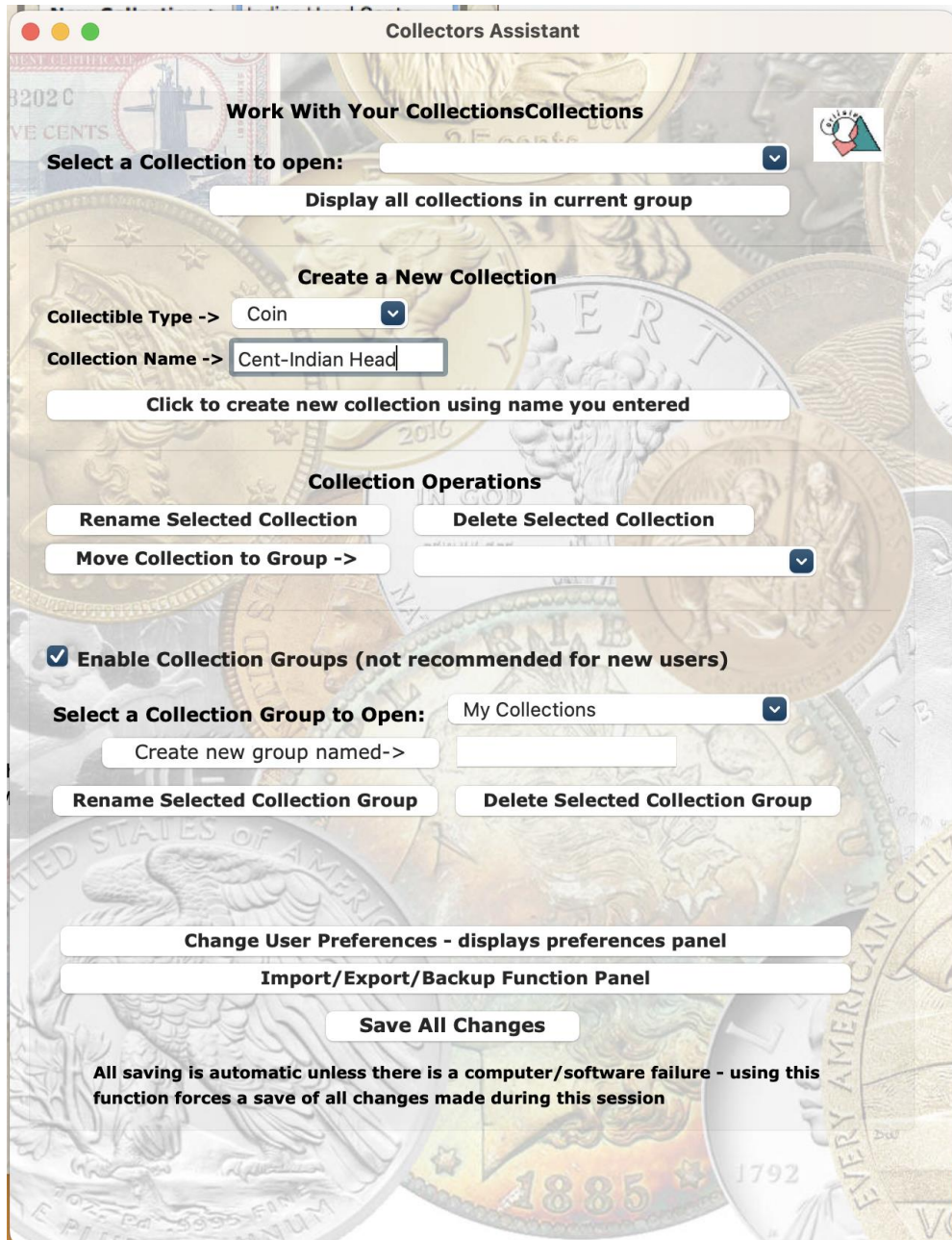
Each collection belongs to a collection Group to assist in keeping things organized. On installation there is one collection group named "My Collections".

The image below indicates that we have selected the Collection Group "My Collections" which currently contains two collections (Dime-Mercury and Dollar-Morgan. We are about to add a new coin collection so we first select "Coin" in the collectible drop down. (note - the collectible determines the data entry fields, reports etc which are appropriate for the selected collectible)

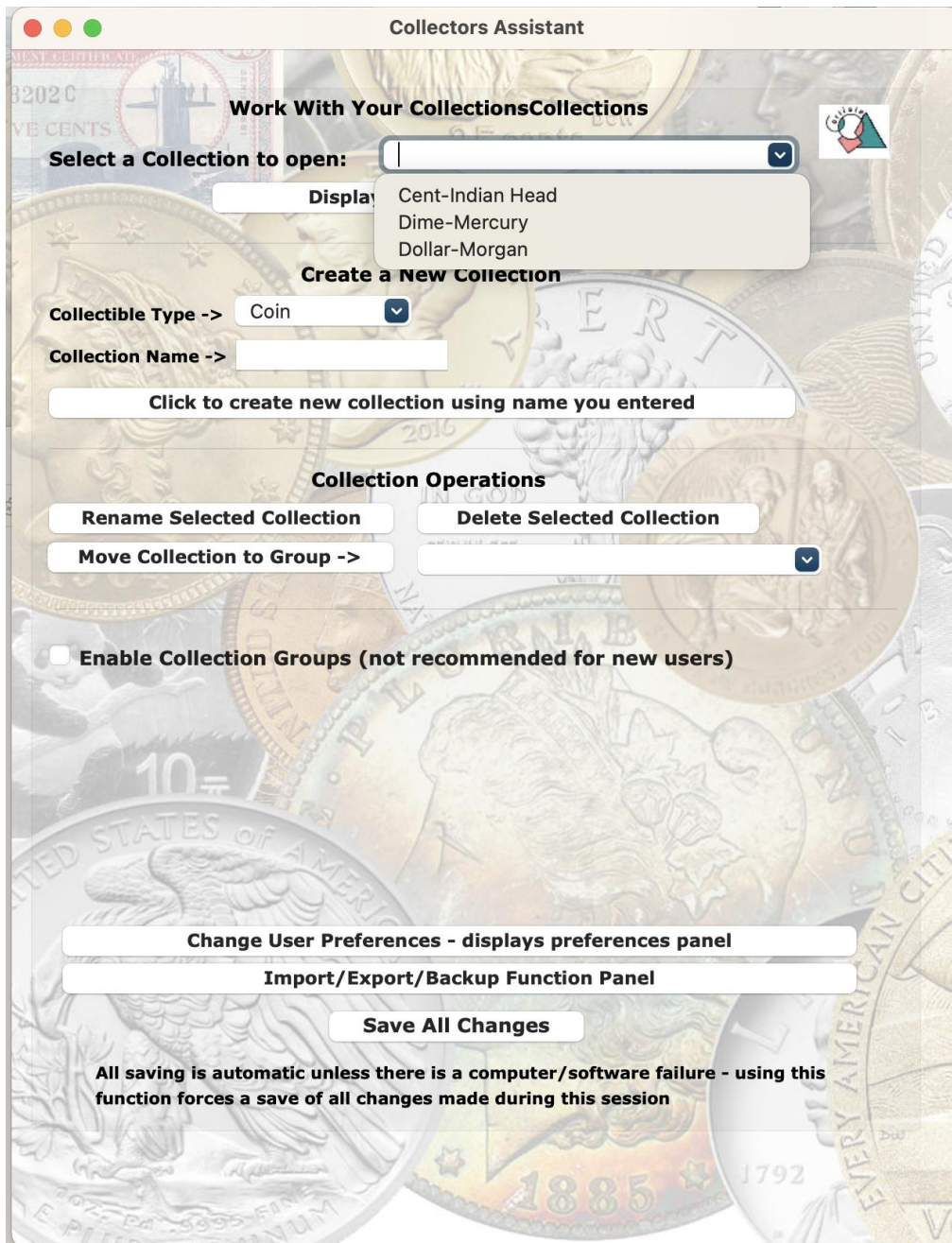


After selecting the collectible "Coin", we then enter the name for the new collection

(Cent-Indian Head in this example) and click on the button "New Collection->"



The result is that the new collection "Indian Head Cents" has been added to the My Collections group and is now ready for us to add coins.



Notes

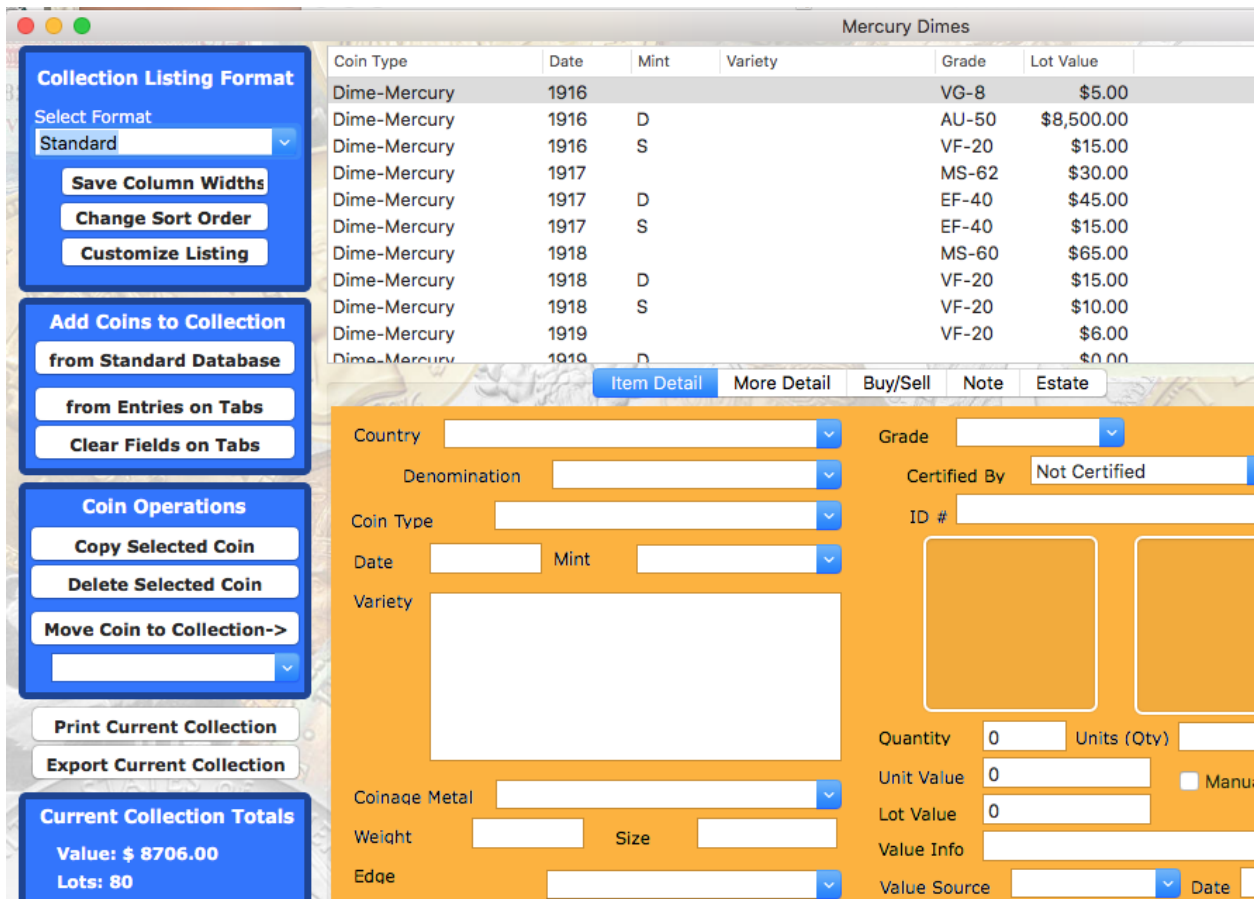
Collections should mirror your collection, there is no "right" way to do it. Common approaches for coins include separate collections for each coin type, denomination, country. Others might be organized into Certified Coins, Albums, etc.

Chapter 3: How to Add Items to a Collection

When a collection is created, the type of collectible for the collection is set. If you have a version which only supports one Collectible such as Coin or Autographs, the type is set automatically, otherwise you select the type when creating the collection.

For collections of type Coin, Paper Money (Currency) or Casino Chip, the preferred way to add items is to copy them from the standard database. For collections of other types items must be manually entered. You may also manually enter items that are not in one of our standard databases.

The illustration below depicts the standard Collection Viewing window. A collection named Mercury Dimes is open currently containing a group of Mercury Dimes. In order to add additional dimes from the standard database, you first click on the button "from Standard Database" in the section labeled "Add Coins to Collection" along the left.



Once this button is clicked, the standard database window appears in front of your collection. It is used to select the coins to be added. We have selected the category Dime-Mercury which resulted in a list of coins starting with 1916. We then selected the 1917D and 1918S and may then add it to our collection by clicking on "Copy Selected Coins to Collection->".

The screenshot shows a software interface for managing a coin collection. The main window displays a table of 'Mercury Dimes' with columns for Coin Type, Date, Mint, Variety, Grade, and Lot Value. A secondary window, titled 'United States Coin Database', is overlaid on top. This window has radio buttons for 'United States', 'Euro Coin', and 'World Coin Types', and a dropdown menu for 'Select Coin Type or Country' set to 'Dime-Mercury'. Below this is a detailed table of coins with columns for Coin Type, Date, Mint, Variety, Denomination, and Coinage Metal. The 1917D and 1918S coins are highlighted in blue. At the bottom of the secondary window is a button labeled 'Copy Selected Coins to Current Collection'.

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00
Dime-Mercury	1919	D			\$0.00

Coin Type	Date	Mint	Variety	Denomination	Coinage Metal
Dime-Mercury	1916			0.1 Dollar	Silver
Dime-Mercury	1916	D		0.1 Dollar	Silver
Dime-Mercury	1916	S		0.1 Dollar	Silver
Dime-Mercury	1917			0.1 Dollar	Silver
Dime-Mercury	1917	D		0.1 Dollar	Silver
Dime-Mercury	1917	S		0.1 Dollar	Silver
Dime-Mercury	1918			0.1 Dollar	Silver
Dime-Mercury	1918	D		0.1 Dollar	Silver
Dime-Mercury	1918	S		0.1 Dollar	Silver
Dime-Mercury	1919			0.1 Dollar	Silver
Dime-Mercury	1919	D		0.1 Dollar	Silver
Dime-Mercury	1919	S		0.1 Dollar	Silver
Dime-Mercury	1920			0.1 Dollar	Silver
Dime-Mercury	1920	D		0.1 Dollar	Silver
Dime-Mercury	1920	S		0.1 Dollar	Silver
Dime-Mercury	1921			0.1 Dollar	Silver
Dime-Mercury	1921	D		0.1 Dollar	Silver
Dime-Mercury	1923			0.1 Dollar	Silver

Notes

You add coins by selecting the category, then the type or country and the select coins on the detailed list and click on "Copy Selected Coins to Current Collection"

You may add as many coins to each collection as you wish. You may also add the same coin multiple times, for instance if you have two identical coins with different grades of costs, etc.

There is no restriction as to what coins can be added to a collection. If you wish to add a Mercury Dime to a collection you named US Quarters, you may do so.

The standard database is organized by coin types (Dollar-Morgan, Nickel-Buffalo, etc) to assist you in easily locating coins. There are also a few special categories that are less obvious as to content. These include:

- Mint Sets, Proof Sets and Prestige Sets - contain the respective standard US Mint issue sets
- Bullion-Silver Eagle - silver bullion coins (American Eagle Design) from 1986-present
- Bullion-Silver ATB 5oz - silver 5 oz America The Beautiful coins from 2010-present
- Bullion-Gold Eagle - gold American Eagle bullion coins from 1986-present
- Bullion-Gold Buffalo - gold American Buffalo (also 2009 UHR Saint) from 2006-present
- Bullion-Platinum Eagle - platinum American Eagle bullion issues from 1997-present
- Commemoratives - Silver commemorative issues from 1892-1954
- Commemoratives Gold - Gold commemorative issued form 1892-1954
- Commemoratives Modern - all commemorative issues from 1982-present

Chapter 4: Editing information about an item in your collection

You may change information in any of the information fields at any time. **(NOTE – we do not allow editing of the fields populated by our standard database as these are shared by all copies of the coin. For manually entered coins this is also a shared record if you copy the coin, so in general manually entered coins should be entered individually from the tabs – clicking on From Current Tabs always creates a new unique coin, whereas copy/paste results in shared numismatic data)**

To do so:

First, select the item to be edited (in the example below we have clicked on the 1917 Mercury Dime, indicated by the highlight)

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00
Dime-Mercury	1919	D			\$0.00

Then on the tabbed folders below (Item Detail, More Detail, Buy/Sell, etc) enter the changes in any information field. In this example we identify PCGS as the certifier

Once you complete editing a text field or make a selection in a choice list, the change will immediately be saved in memory and the collection listing and totals

updated if they are affected.

The screenshot displays a software interface for managing a coin collection. At the top, a window titled "Mercury Dimes" contains a table with the following data:

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00
Dime-Mercury	1919	D			\$0.00

Below the table, the "Item Detail" tab is active, showing the following information for the selected coin:

- Country: United States
- Denomination: 0.1 Dollar
- Coin Type: Dime-Mercury
- Date: 1917
- Mint: D
- Variety: (empty field)
- Grade: EF-40
- Certified By: PCGS
- ID #: (empty field)
- Quantity: 1
- Unit Value: 45
- Lot Value: 45

The interface also features several utility panels on the left:


- Collection Listing Format:** Select Format (Standard), Save Column Widths, Change Sort Order, Customize Listing.
- Add Coins to Collection:** from Standard Database, from Entries on Tabs, Clear Fields on Tabs.
- Coin Operations:** Copy Selected Coin, Delete Selected Coin, Move Coin to Collection->
- Print Current Collection**
- Export Current Collection**
- Current Collection Totals**

You may also magnify and change the pictures by right clicking on either on the Item Detail tab

Dollar-Morgan	1880		MS-60	\$50.00
Dollar-Morgan	1880	O	MS-60	\$85.00
Dollar-Morgan	1881	S	MS-60	\$50.00
Dollar-Morgan	1882	S	MS-60	\$52.00
Dollar-Morgan	1883		MS-60	\$50.00
Dollar-Morgan	1885		MS-60	\$50.00

Grade	
G-4	24
VG-8	33
F-12	37
VF-20	38
EF-40	39
AU-50	42
AU-58	75
MS-60	100
MS-62	200
MS-63	350
MS-64	1500
MS-65	16000
MS-63D	2000
MS-64D	7250

Item Detail
More Detail
Buy/Sell
Note
Estate





Window

Change Picture

Grade MS-60

Certified By

ID #

Quantity 1 Units (Qty)

Unit Value 85 Manual Value

Lot Value 85

Value Info

Value Source Coin World Date 2014

Real Value 55.25 CAC

Grade Attributes 0

Notes:

1) Items that are copied from our database will not allow the editing of preloaded information such as Coin Type, Date, Mint, Variety, etc. These fields may be edited for manually entered coins.

Section 2: Basic Functions

Section 2 includes 6 chapters providing instruction on functions you will most likely want to use as you progress with cataloguing of your collection.

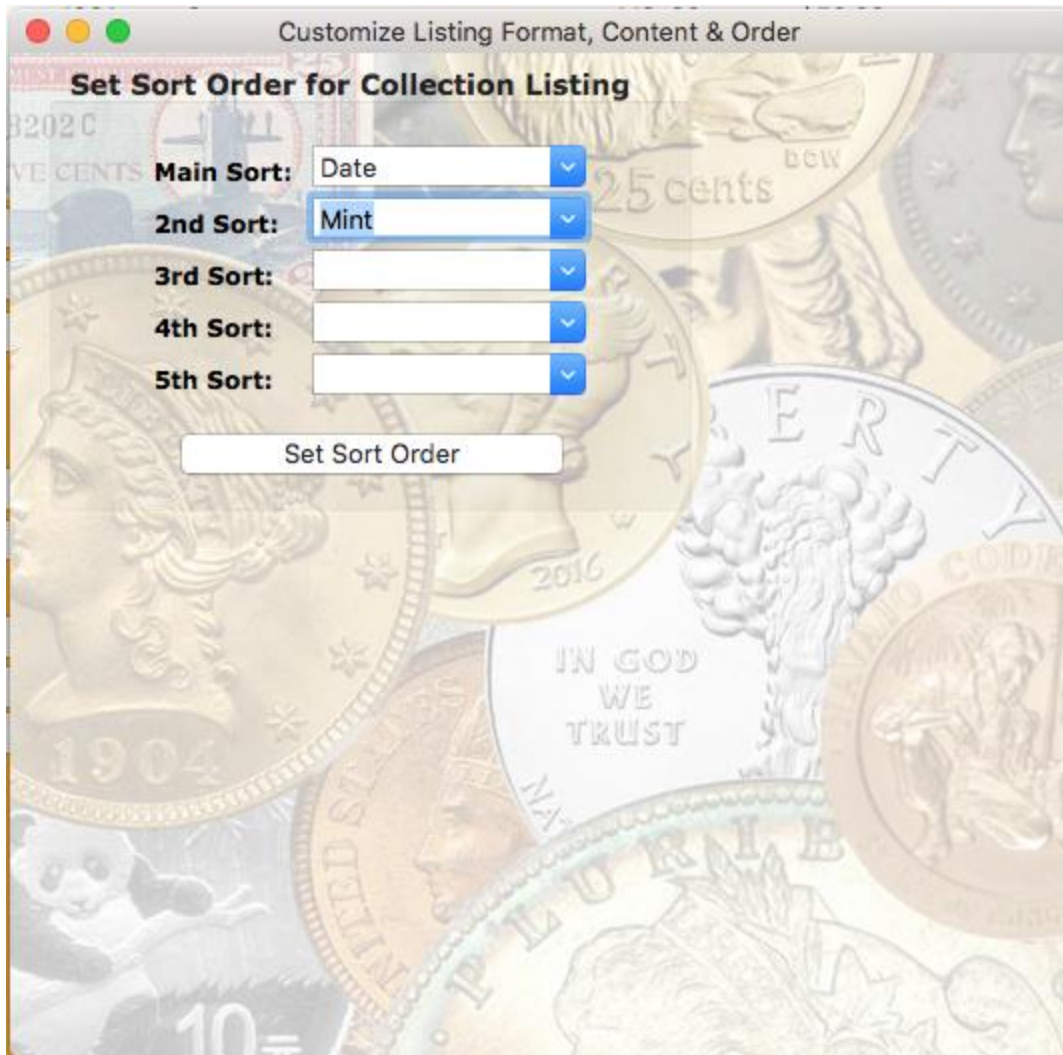
- Chapter 5: How to Setup the Order in which items are displayed in the Collection Listing grid
- Chapter 6: How to Customize the Collection Listing Grid
- Chapter 7: How to Print the Current Collection
- Chapter 8: How to Delete coins in your Collection
- Chapter 9: How to Move coins from one collection to another
- Chapter 10: Update the Values, Calculated information fields and collection totals
- Chapter 11: Want Lists
- Chapter 12: Finding Coins Meeting a Specific Criteria

Chapter 5: How to Setup the Order in which items are displayed in the Collection Listing grid

The order in which coins are displayed in the Collection Listing Grid may be changed at any time by specifying up to 5 information fields on which to base the sort.

Sort order is determined by clicking on the "Change Sort Order" button which displays the window "Customize Listing Format, Content and Order."

The illustration below depicts the selection of "Date" as the main sort and "Mint" as the second sort, resulting in a typical ordering of coins of a single type. You may use any information fields for the purpose of sorting. For example Grade, Certified by, Lot Value, Coinage Metal are all typical sortings

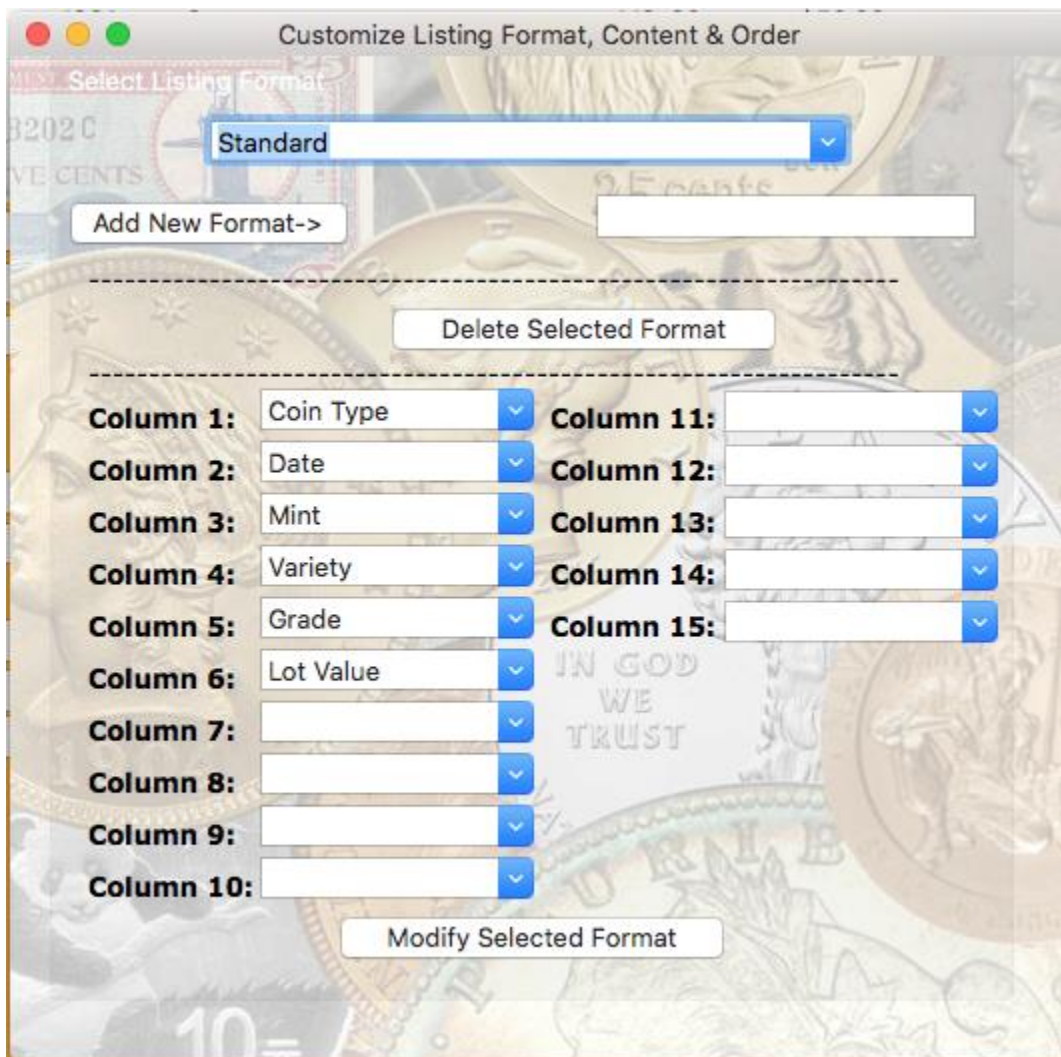


Chapter 6: Customize the column content of the Collection Listing Grid

You have complete flexibility as to the column content of the collection listing grid. The content is controlled by a listing format. You may create and modify listing formats while any collection is displayed by clicking on the button "Customize Listing" along the left side of the Collection Window

At the top of the column format customizer is a dropdown which can be used to select an existing listing format as well as an Add New Format-> button which allows you to create new formats.

A Listing format contains up to 20 columns, each of which may be assigned any information field.

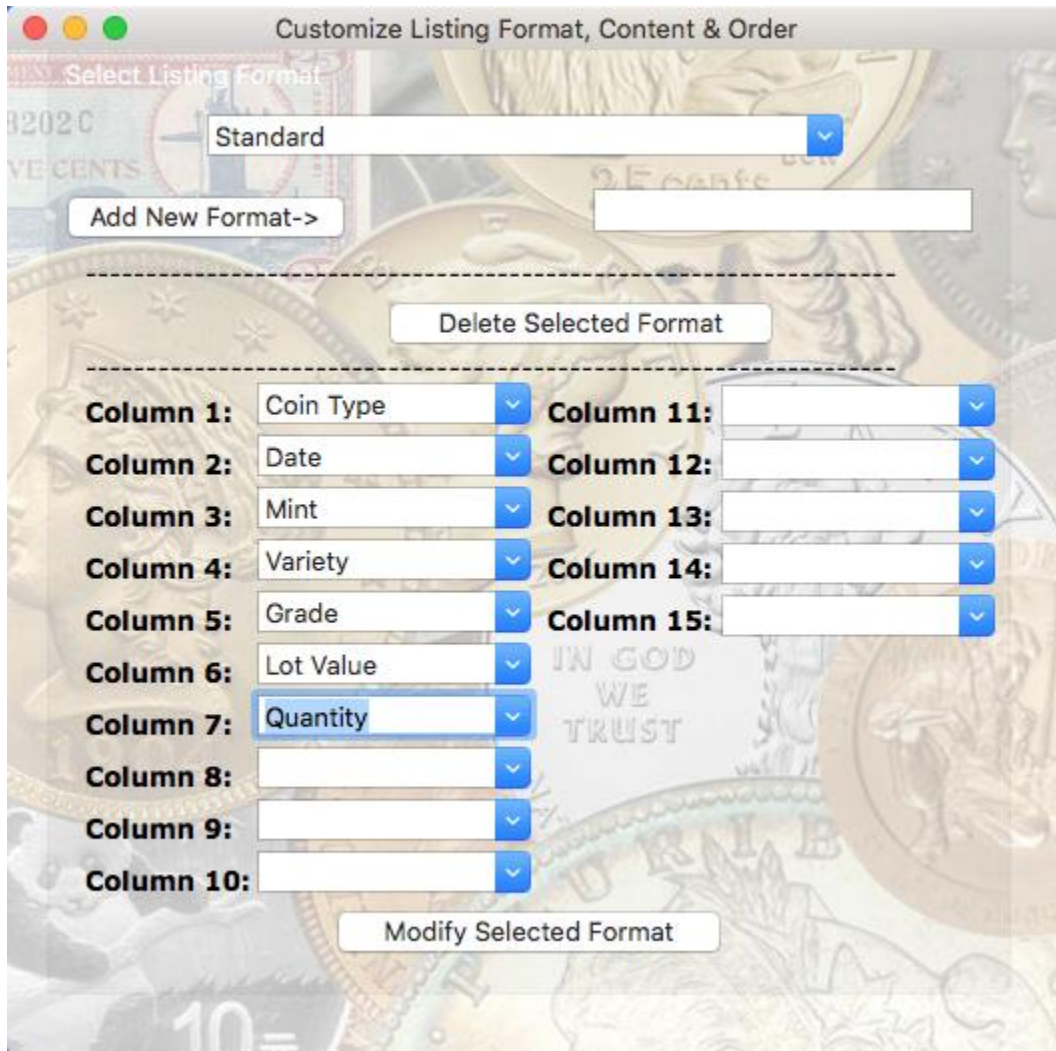


To Modify an existing format:

Select the desired format - the column selectors will present the currently assigned fields

Change any desired column selectors - in this example I have added Quantity as column 7

Click on "Modify Selected Format"

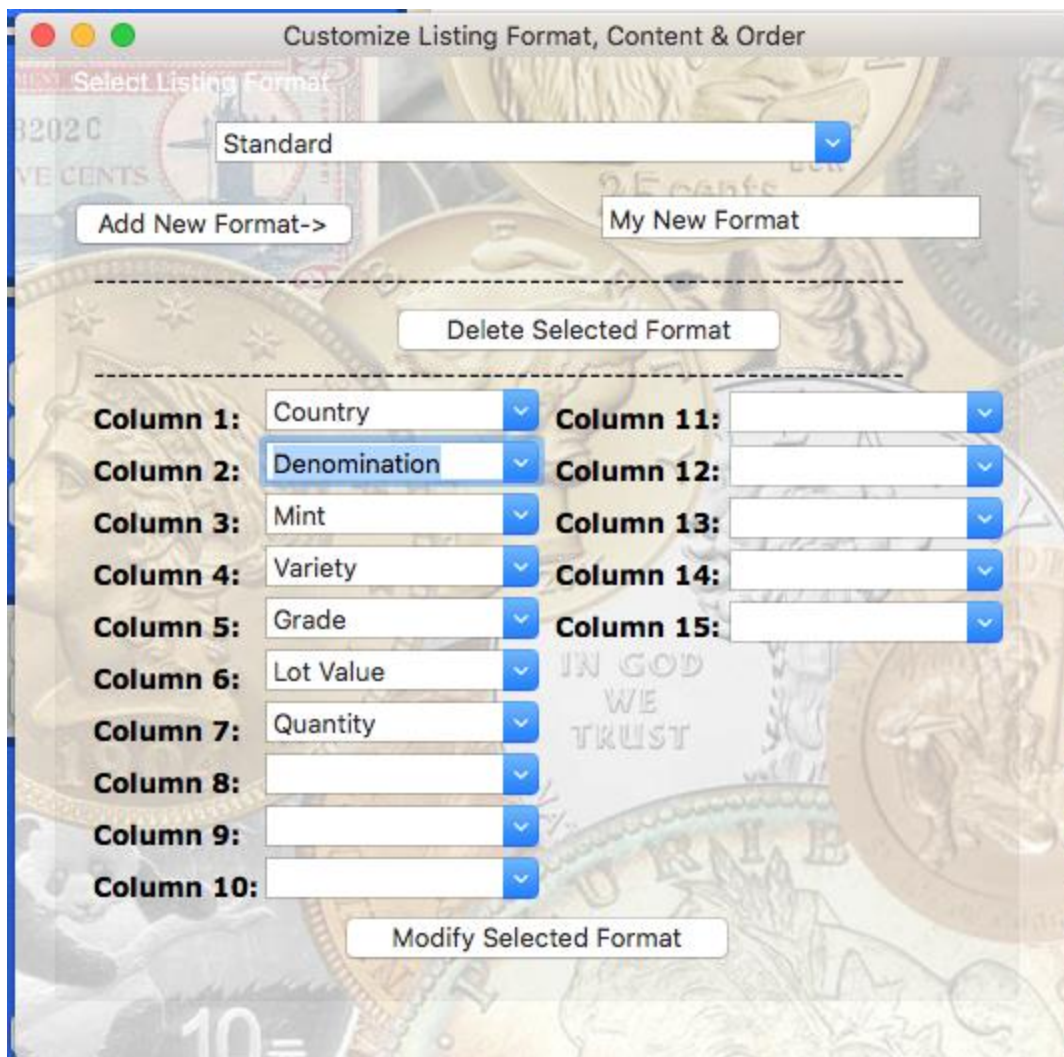


To create a new format:

Enter a name for the new format in the box to the right of the "Add New Format" button

Make your desired column selections

Click on "Add New Format"



Notes:

You may create as many listing formats as you like

If you inadvertently create a format you no longer need, you may select it and then click on "Delete Selected Format"

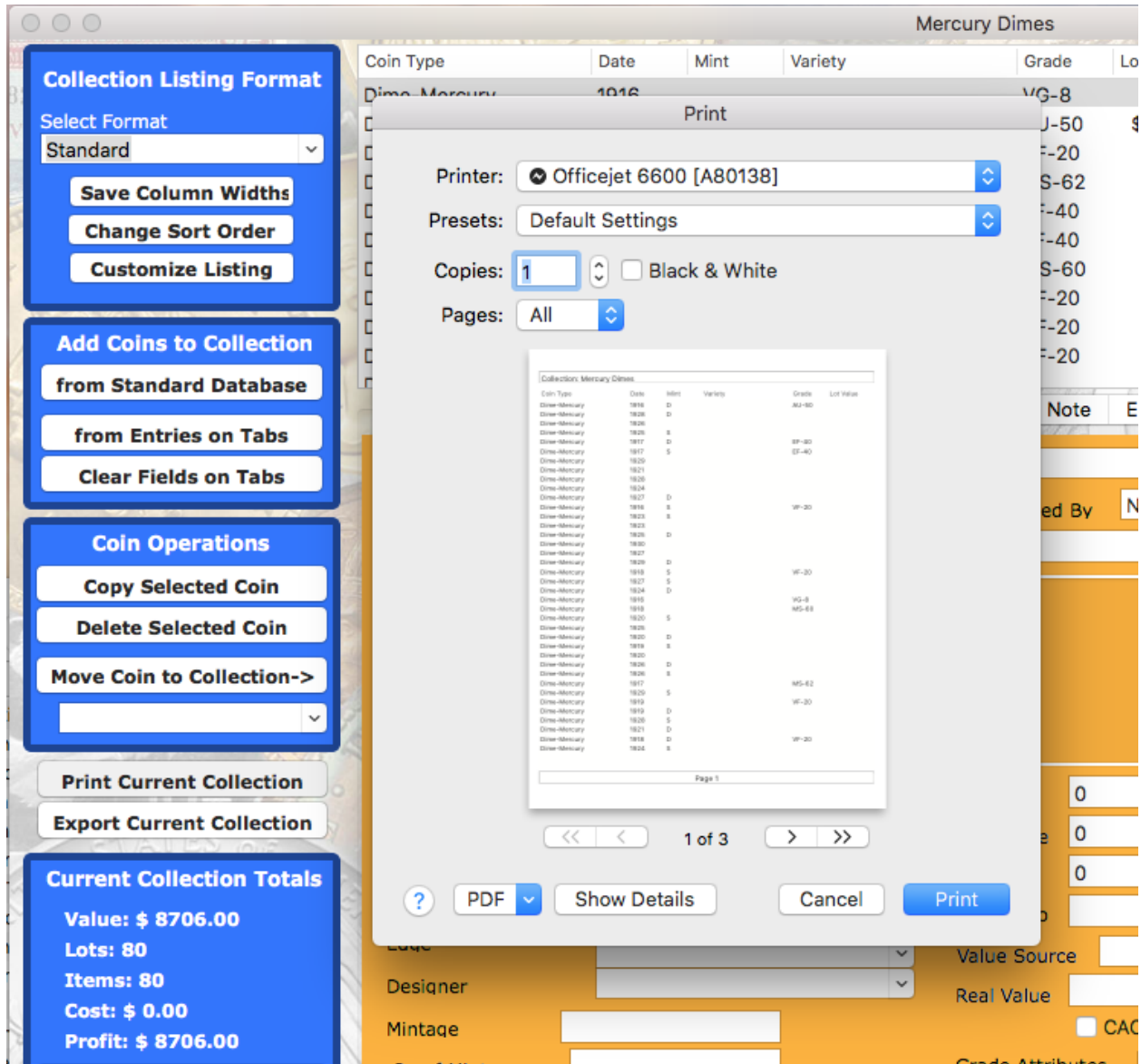
The format "Standard" is assigned to any new collection so this must not be deleted and it is likely you will want to customize it to your preferred common listing.

You may find it useful to create a separate Listing format for printed reports since they are subject to paper size limitations, whereas while viewing you are able to scroll the window.

Chapter 7: How to Print the Current Collection

Printing the current collection listing is a very common operation which may be easily accomplished.

Open the collection you wish to print and then click on the "Print Current Collection" button along the left side of the Collection Listing. - this will display a print dialog allowing you to select the printer and other print parameters.



If the desired printer is the default selection, just click on "Print" and your report will be sent to the printer. You may also adjust any of the printer parameters prior to printing.

Chapter 8: How to Delete an Item in one of your collections

At times you may want to delete items in your collections, either because the item was inadvertently added to your collection or you may have sold the item.

Permanent Deletion of an Item

To delete an item in a collection, you select it and then click on the button "Delete Selected Coin". In the example below we have selected the duplicate 1917 to be deleted.

The screenshot displays a software interface for managing a coin collection. The main window is titled "Mercury Dimes" and contains a table of coins. The table has columns for Coin Type, Date, Mint, Variety, Grade, and Lot Value. One row, representing a 1917 Dime-Mercury with MS-62 grade and a lot value of \$0.00, is highlighted in blue. To the left of the table is a sidebar with several functional sections: "Collection Listing Format" (with a dropdown set to "Standard" and buttons for "Save Column Widths", "Change Sort Order", and "Customize Listing"), "Add Coins to Collection" (with buttons for "from Standard Database", "from Entries on Tabs", and "Clear Fields on Tabs"), "Coin Operations" (with buttons for "Copy Selected Coin", "Delete Selected Coin", and "Move Coin to Collection->"), "Print Current Collection", and "Export Current Collection". At the bottom left, a "Current Collection Totals" box shows a value of \$8706.00, 80 lots, and 80 items. Below the table, there are tabs for "Item Detail", "More Detail", "Buy/Sell", "Note", and "Estate". The "Item Detail" tab is active, showing a form for the selected coin with fields for Country (United States), Denomination (0.1 Dollar), Coin Type (Dime-Mercury), Date (1917), Mint, Variety, Grade (MS-62), Certified By, ID #, Quantity (1), Unit Value (30), Lot Value (30), Value Info, Value Source (Coin World), Real Value (19.5), Coinage Metal (Silver), Weight (2.5g), Size (17.91mm), Edge, and Designer (Weinman/Barber). A small image of the coin is shown in a circular frame.

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917			MS-62	\$0.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00

After clicking on the "Delete Selected Coin" button the 1917 no longer appears on the list of coins in our collection.

The screenshot shows a software application window titled "Mercury Dimes". On the left is a sidebar with several sections of buttons:

- Collection Listing Format:** Includes a "Select Format" dropdown (set to "Standard"), "Save Column Widths", "Change Sort Order", and "Customize Listing" buttons.
- Add Coins to Collection:** Includes buttons for "from Standard Database", "from Entries on Tabs", and "Clear Fields on Tabs".
- Coin Operations:** Includes buttons for "Copy Selected Coin", "Delete Selected Coin", and "Move Coin to Collection->" with a dropdown menu.
- Print/Export:** Includes "Print Current Collection" and "Export Current Collection" buttons.
- Current Collection Totals:** A button at the bottom of the sidebar.

The main area contains a table of coins:

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00
Dime-Mercury	1919	D			\$0.00

Below the table are tabs for "Item Detail", "More Detail", "Buy/Sell", "Note", and "Estate". The "Item Detail" tab is active, showing a form with fields for Country, Denomination, Coin Type, Date, Mint, Variety, Grade, Certified By (set to "Not Certified"), ID #, Quantity (0), Units (Qty), Unit Value (0), and Lot Value (0). There are also input fields for Weight and Size.

You may delete multiple item by performing a multiple selection operation using the command-click

Chapter 9: How to Move an item from one collection to another

At times you may want to re-organize your collections by moving items from one collection to another.

Move an Item from one collection to another

To move an item in a collection.

- Select the item to be moved
- Select the destination collection in the dropdown box below “Move Coin to Collection->” along the left
- Click on “Move Coin to Collection->”

The screenshot shows a software window titled "Window" with an orange background. On the left, there are two main sections: "Collection Listing" and "Coin Operations".

Collection Listing: Includes a "Select Format" dropdown set to "Standard", and buttons for "Save Column Widths", "Change Sort Order", and "Customize Listing".

Coin Operations: Includes buttons for "Apply Changes to Current Coin", "Delete Selected Coin", "Copy Selected Coin", "Move Coin to Collection->", and a dropdown menu. Below this is the "Add Coins to Collection" section with buttons for "from Standard Database" and "from Manual Entry on tabs", and a "Print Current Collection" button at the bottom.

Table: A table with columns: Coin Type, Date, Mint, Variety, Grade, and Co. The data is as follows:

Coin Type	Date	Mint	Variety	Grade	Co
Dime-Mercury	1924	D			Sil
Dime-Mercury	1924	S			Sil
Dime-Mercury	1925				Sil
Dime-Mercury	1925	D			Sil
Dime-Mercury	1927	D			Sil
Dime-Mercury	1928				Sil
Dime-Mercury	1928	D			Sil
Dime-Mercury	1928	S			Sil

Item Detail View: Shows fields for Country (United States), Denomination (0.1 Dollar), Coin Type (Dime-Mercury), Date (1927), Mint (D), Variety (empty), Grade (empty), Certified By (Not Cer), ID # (empty), and a coin image. Below the image are fields for Quantity (1), Unit Value (0), Lot Value (0), Value Info (empty), and Value Source (empty). At the bottom, there are fields for Coinage Metal (Silver .900), Weight (2.5g), Size (17.91mm), Edge (empty), Designer (0), Mintage (4,812,000), and Proof Mintage (empty).

Chapter 10: Totals of the currently displayed collection - How to Update Totals, Values and Calculated Fields

When a collection window is opened, the lower left corner contains a section named "Collection Totals".

This displays the total value, lots, items, cost and profit of the currently selected open collection. This information is typically updated in real time as edits are made to the data, but in some instances there will be a need to update all coins in the current collection.

Coin Type	Date	Mint	V
Dime-Mercury	1916		
Dime-Mercury	1916	D	
Dime-Mercury	1916	S	
Dime-Mercury	1917		
Dime-Mercury	1917	D	
Dime-Mercury	1917	S	
Dime-Mercury	1918		
Dime-Mercury	1918	D	
Dime-Mercury	1918	S	
Dime-Mercury	1919		
Dime-Mercury	1919	D	

Current Collection Totals

Value: \$ 8706.00
 Lots: 80
 Items: 80
 Cost: \$ 0.00
 Profit: \$ 8706.00

Update Totals
 Update All Values
 Show All Collection Totals

Item Detail

Country:
 Denomination:
 Coin Type:
 Date: Mint:
 Variety:
 Coinage Metal:
 Weight: Size:
 Edge:
 Designer:
 Mintage:
 Proof Mintage:

There are two buttons located below the totals:

Update Totals - click on this button to recalculate the totals to be sure they are up to date. In some instances they will not be up to date for some coin operation. When in doubt, click on this button which response almost instantly.

Update All Values - this button processes all coins in the current collection as follows:

- If the Manual Value checkbox is checked, the unit value is left alone
- If the Manual Value checkbox is NOT checked, it will look up the assigned grade for each coin and enter the Coin World value into the Unit Value field
- If no Coin World value is found, it will calculate a bullion value for gold, silver, platinum and palladium coins for which weight and coinage metal are specified. The spot prices for bullion value calculations are maintained by the user under User Preferences.
- If no Bullion or Coin World Value is found, the face value for US Circulating coins only.
- After setting Unit Value, the Lot Value will be updated to $\text{Quantity} * \text{Unit Value}$
- After calculating Lot Value, the Profit will be calculated as $\text{Lot Value} - \text{Cost}$.

Once all coins are processed, the Update Totals function is automatically called.

Note - the Update All Values button will take a few seconds to complete processing depending on the size of the collection.

Notes:

- In order to pick up a value in the Coin World table, the grade must match perfectly with an entry in the table. For some coins suffixes are needed such as R (Red), DC (deep cameo), etc. The easiest way to assure a match is to select the grade directly in the values table.
- A few base grades are automatically matched to their precise grade as existing in the table. These include:
 - AG will match AG-3
 - G and Good will match G-4
 - VG and Very Good will match VG-8
 - F and Fine will match F-12
 - VF and Very Fine will match VF-20
 - EF and Extra Fine will match EF-40
 - AU and Almost Unc will match AU-50
 - Unc will match MS-60
 - Proof will match PF-65

If you are looking a collection listing of all coins in all collections in the current group, then the totals will be for all coins in all collections.

You may also display a report containing the totals of all coins in all collections in all collection groups with subtotals and grand totals. Click on Show All Collection Totals and a new report will display which may be viewed and/or printed

Group	Collection	Items	Value	Cost	Profit	Lots
Albums	Indian Cents					
Albums	Lincoln Cents					
Albums	~ subtotal	0	0	0	0	0
My Collections	Mercury Dimes	80	8706	0	8706	80
My Collections	Sample Collection	41	30487	100	30387	42
My Collections	test	0	0	0	0	0
My Collections	~ subtotal	121	39193	100	39093	122
~ grand total	~ grand total	121	39193	100	39093	122

Figure 1 contains a summary report of all collections in all groups, ordered by groups and collections. At the end of each group is a subtotal for the group and at the end of the entire report a grand total

Chapter 11: Display/Print a Want List

Standard want list reports may be generated for viewing or printing based on user identified parameters including:

- Quantity = 0 - includes coins which the user has added to a collection but for which the quantity field is 0
- Grade field is blank - includes coins which the user has added to a collection but for which the grade field is left blank
- includes coins which the user has added to a collection named Want List
- Want lists are directly added from the Want List choice on the main menu and may be generated from the current open collection or across all collections

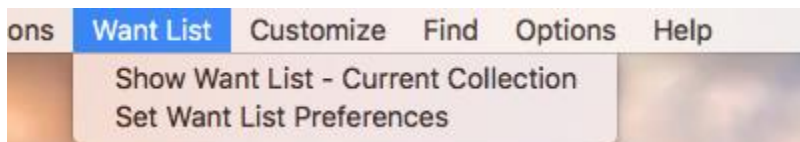


Figure 1 illustrates the Want List portion of the main menu.

Clicking on Show Want List - current collection will display the coins meeting the want criteria in the current collection or if you display all collections in the current collection group, all coins wanted in the current collection group.

Clicking on Set Want List Preferences will display the User Preferences pane, shown in figure 2.

The lower left portion allows the user to select the criteria which will identify coins which are wanted. There are three choices, a blank Grade field, 0 in the Quantity field or the Want checkbox is checked if present in the user interface

Collector's Assistant - User Preferences

Colors

Listing Background

Tabbed Folders

Controls Area

Database Window

Printer Scale (default 1.0)

Printer Margins

Top Bottom

Left Right

Printer Row Height (10-20):

Printer Font Points (usually row ht-1):

Printer Orientation

Portrait

Landscape

System

Automatic Backup (Enabled)

This is master system (Enabled)

System ID

Want List - Coins to be Included

Grade is blank

Quantity is 0

Want checkbox is check

Coin & Currency Values

Silver

Gold

Platinum

Palladium

Value Alternates (Enabled)

Bullion If Higher (Enabled)

RealValue Calculation Multipliers

CAC (default = 1.15)

Scarce Coins (default = 1.0)

Common worth < \$100 (.65)

Common worth \$100-\$500 (.75)

Common worth \$500-\$5000 (.85)

Common worth > \$5000 (.9)

Use Bullion or Face if worth < (

Chapter 12: Find Coins Meeting a Particular Criteria

Find - predefined searches

A number of common searches may be directly initiated from the main menu of Collector's Assistant. These are accessed from the Find menu

Available Searches

- Date
- Grade
- Value
- Certifier
- Country
- Denomination

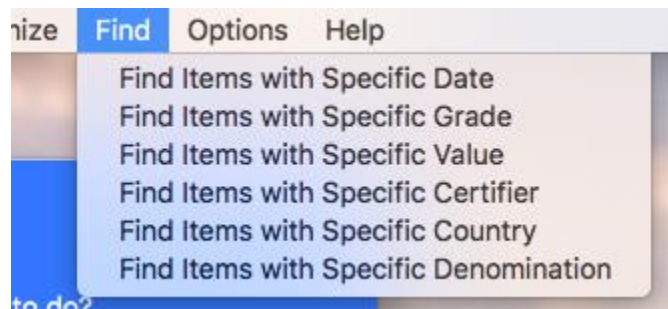


Figure 1 depicts that Find submenu of the main menu, selecting on of the choices will produce a small window in which you can enter the parameters for the selected search

Section 3: Advanced Functions

Section 3 includes 6 chapters providing instruction on functions you will most likely want to use as you progress with cataloguing of your collection.

- Chapter 13: Copy a coin already in your collection
- Chapter 14: Setup Collection Groups
- Chapter 15: Manually enter a coin that is not in our database
- Chapter 16: How to Print All Collections in the Current Selection Group
- Chapter 17: How to Produce Reports as PDF Files
- Chapter 18: Customizing the User Interface
- Chapter 19: Attaching your own pictures to coins in your collections
- Chapter 20: Advanced Value Functions
- Chapter 21: Customizing Data Entry Screens
- Chapter 22: Graphical Analysis
- Chapter 23: Collector Tools – Coin ID/Mint Mark Location

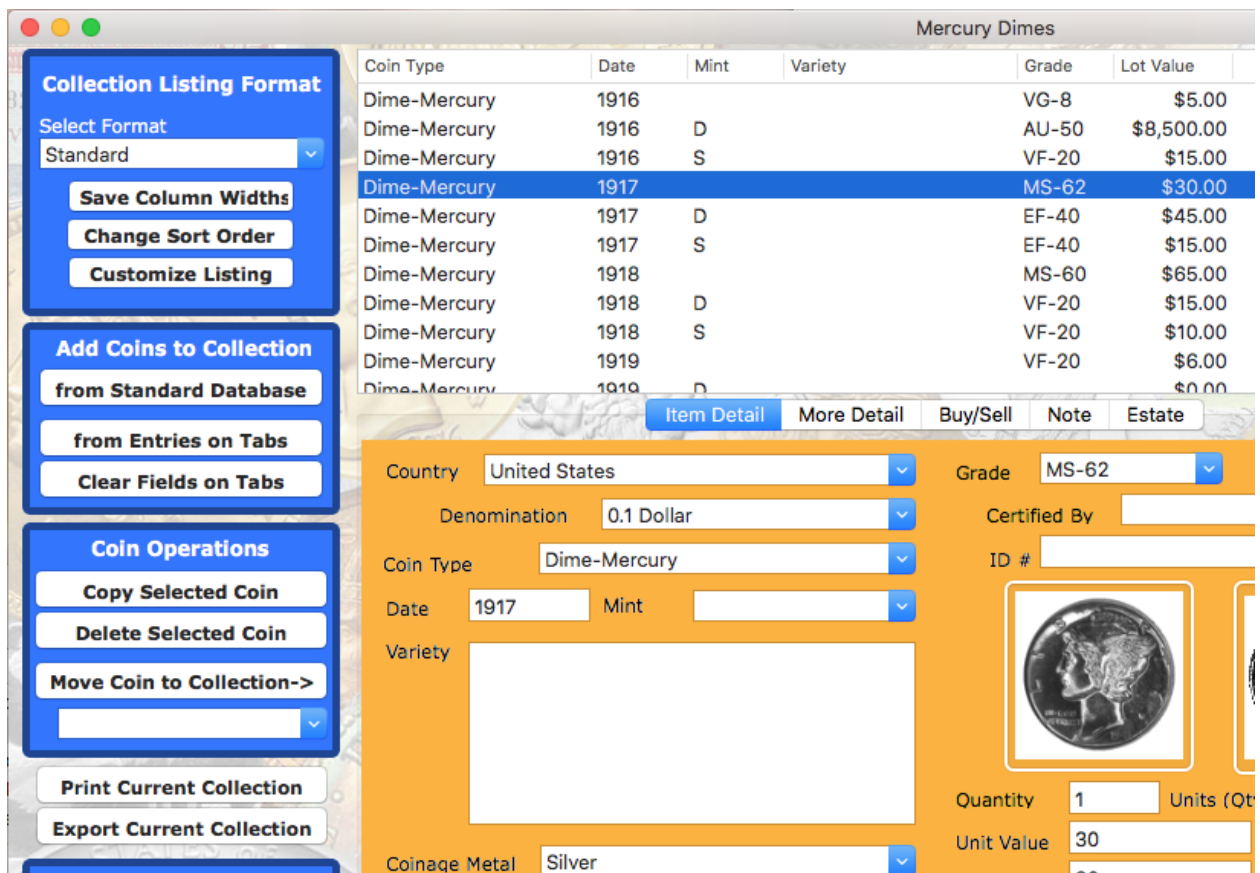
Chapter 13: Copy a coin which is already in your collection.

You may have several identical coins (Coin Type, Date, Mint and Variety) which are in different conditions, purchased at different prices, etc. In that case you may copy an existing coin and then modify the fields that are different

The illustration below depicts the standard Collection Viewing window. A collection named Dimes is open currently containing a group of Mercury Dimes.

We have selected the 1917 Philadelphia (no mint mark) to be copied.

To make a copy of this coin we need only click on "Copy Selected Coin"



As you can see a second copy of the 1917 Philadelphia dime has been added.

Mercury Dimes

Coin Type	Date	Mint	Variety	Grade	Lot Value
Dime-Mercury	1916			VG-8	\$5.00
Dime-Mercury	1916	D		AU-50	\$8,500.00
Dime-Mercury	1916	S		VF-20	\$15.00
Dime-Mercury	1917			MS-62	\$30.00
Dime-Mercury	1917			MS-62	\$0.00
Dime-Mercury	1917	D		EF-40	\$45.00
Dime-Mercury	1917	S		EF-40	\$15.00
Dime-Mercury	1918			MS-60	\$65.00
Dime-Mercury	1918	D		VF-20	\$15.00
Dime-Mercury	1918	S		VF-20	\$10.00
Dime-Mercury	1919			VF-20	\$6.00

Collection Listing Format
 Select Format: Standard
 Save Column Widths
 Change Sort Order
 Customize Listing

Add Coins to Collection
 from Standard Database
 from Entries on Tabs
 Clear Fields on Tabs

Coin Operations
 Copy Selected Coin
 Delete Selected Coin
 Move Coin to Collection->
 Print Current Collection
 Export Current Collection
 Current Collection Totals

Item Detail More Detail Buy/Sell Note Estate

Country: [Dropdown] Grade: [Dropdown]
 Denomination: [Dropdown] Certified By: Not Certified
 Coin Type: [Dropdown] ID #: [Text]
 Date: [Text] Mint: [Dropdown]
 Variety: [Text Area]
 Coinage Metal: [Dropdown]
 Weight: [Text] Size: [Text]
 Quantity: 0 Units (O): [Text]
 Unit Value: 0
 Lot Value: 0

Notes:

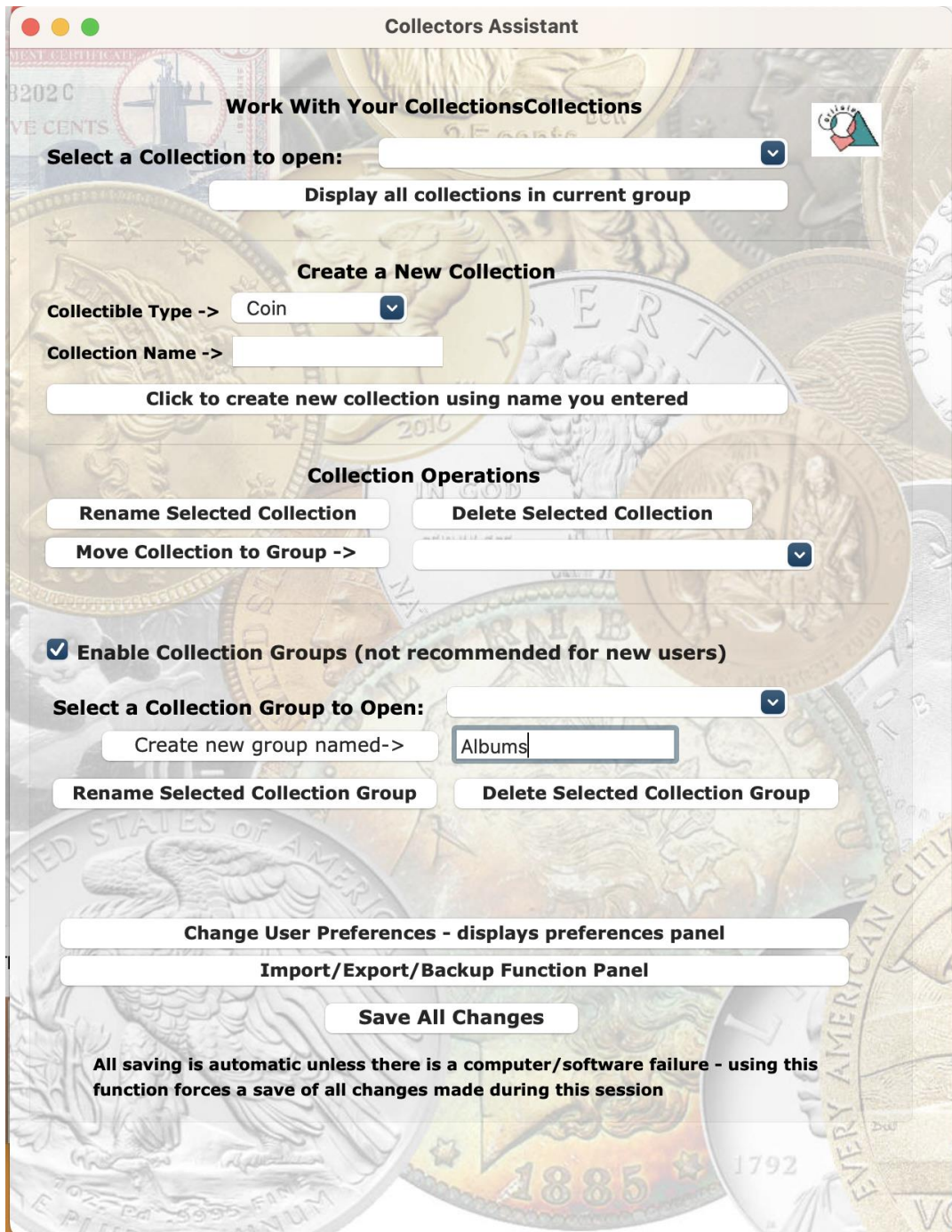
You may copy a coin as many times as needed.

Do not alter the Coin Type, Date, Mint or Variety of a copied coin as the values table and numismatic data will still apply to the original coin as copied from the database. Only identical coins should be added by copying an existing one.

Chapter 14: How to Setup Collection Groups

As you catalog your collection, you may find an increasing number of collections which you would like to organize into groups. On installation, all collections you create are placed in the default Collection Group “My Collections”.

You may add your own collection groups. For example you might place all of your coin albums in a Collection Group named “Albums” or perhaps you might place your Paper Money collections in a Collection Group named “Paper Money” and your coin collections in a Collection Group named Coins.



You may create as many collection groups as you need. You may add new collections to any existing collection group. You may also move collections between collection groups and coins between collections in any group.

Collection groups are created using the Collector's Assistant controls area. The illustration below shows the controls area as we prepare to add a new Collection Group named "Coin Albums". To do so, you enter the name of the new group in the entry field to the right of the "New Group->" button and then click on the "New Group->" button.

The new group is added to the drop down listing all available Collection groups as shown in the diagram below. This drop down is also used to select the current collection group in order to access its collections.

Chapter 15: How to manually add an item that is not in our standard database.

All United States coins and paper money should be entered from our standard database, by clicking on "from Standard Database" in the "Add Coins to Collection" section along the left.

In some cases, you may wish to catalog items that are not in our database. This might include tokens, ingots, private mint issues, etc.

To do so, you first open the collection to which the coins will be added.

The screenshot shows the 'Indian Head Cents' collection management interface. On the left, there are several sections: 'Collection Listing Format' with a 'Standard' format selected and buttons for 'Save Column Widths', 'Change Sort Order', and 'Customize Listing'; 'Add Coins to Collection' with buttons for 'from Standard Database', 'from Entries on Tabs', and 'Clear Fields on Tabs'; 'Coin Operations' with buttons for 'Copy Selected Coin', 'Delete Selected Coin', and 'Move Coin to Collection->'; 'Print Current Collection' and 'Export Current Collection' buttons; and 'Current Collection Totals' showing 'Value: \$ 0.00', 'Lots: 0', 'Items: 0', 'Cost: \$ 0.00', and 'Profit: \$ 0.00'. The main area features a table with columns for 'Coin Type', 'Date', 'Mint', 'Variety', 'Grade', and 'Lot Value'. Below the table are tabs for 'Item Detail', 'More Detail', 'Buy/Sell', 'Note', and 'Estate'. The 'Item Detail' tab is active, showing a form with fields for 'Country' (United States), 'Denomination', 'Coin Type' (Civil War Token), 'Date' (1861), 'Mint', 'Variety' (USS Monitor), 'Grade', 'Certified By' (Not Certified), 'ID #', 'Quantity' (0), 'Units (Qty)', 'Unit Value' (0), 'Lot Value' (0), 'Value Info', 'Value Source', 'Date', 'Real Value' (0), and 'CAC' checkbox. The 'Coinage Metal' is set to 'Bronze'.

Once the collection is open, click on the button "Clear Fields on Tabs" which will empty the tabbed folders and also unselect any coin currently selected in the collection. You may then enter the information in the information fields on the tabbed folders.

After we enter the desired information, we clicked on "from Manual Entry on Tabs"

which added the highlighted item to our listing.

Manually added items enjoy full functionality of the Collector's Assistant with the exception that values must be entered by the user as well as any desired numismatic data.

The Collector's Assistant will calculate bullion value for manually added items containing Gold, Silver, Platinum or Palladium as long as the coinage metal and weight are entered in the formats below:

Coinage Metal: Gold, Silver, Platinum or Palladium followed by the fineness:

examples: Gold .9999, Platinum .995, Silver .9216

Weight: a number followed by a word beginning in "o" or "O" for troy ounce and "g" or "G" for grams

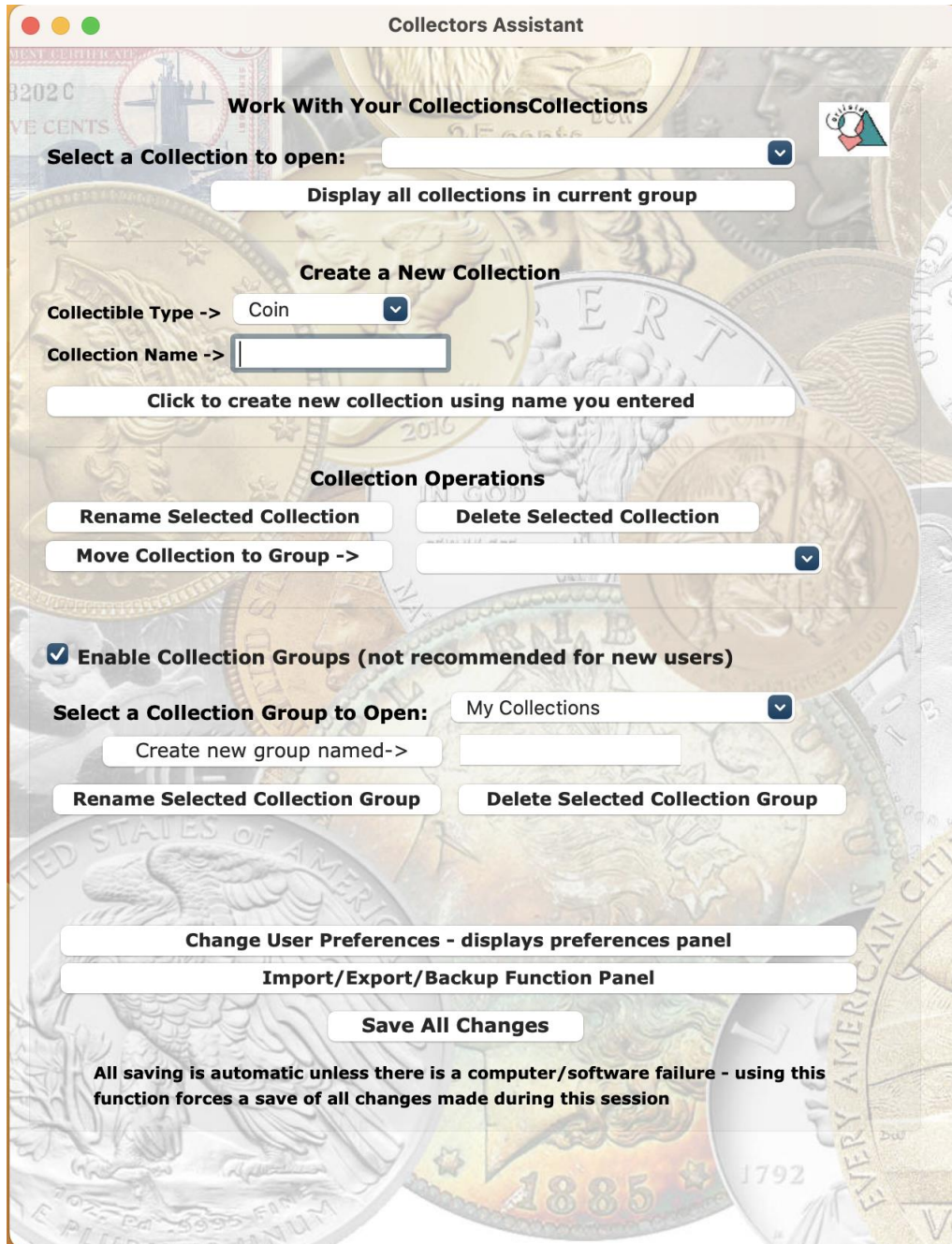
examples: 1 oz, 33.3 grams, 33.3 g, .5 ounce

Chapter 16: How to Print All Collections in the Current Selection Group

You may wish to view and print a collection listing including all or selected coins in the current collection group. This is easily accomplished in a manner similar to printing the Current Collection.

First select the group (My Collections is selected in the illustration below).

Next click on Display All Collections in current group



This will display a collection listing containing all coins in all collections. (Note - we have added the column "Collection" to the listing format so that we can see which coins are in which collection. We have also specified a 3-level sort (Collection, Coin Type and Date)

Of course, once displayed, you may use any listing format, sorting and filtering that you need.

Coin Type	Date	Mint	Variety	Grade	Lot
Cent-Flying Eagle	1856				
Dollar-Trade	1874			MS-60	\$
Dollar-Trade	1875			MS-60	\$
Dollar-Morgan	1878	CC		MS-60	
Dollar-Morgan	1879			MS-60	
Dollar-Morgan	1880			MS-60	
Dollar-Morgan	1880	O		MS-60	
Dollar-Morgan	1881	S		MS-60	
Dollar-Morgan	1882	S		MS-60	
Dollar-Morgan	1883			MS-60	

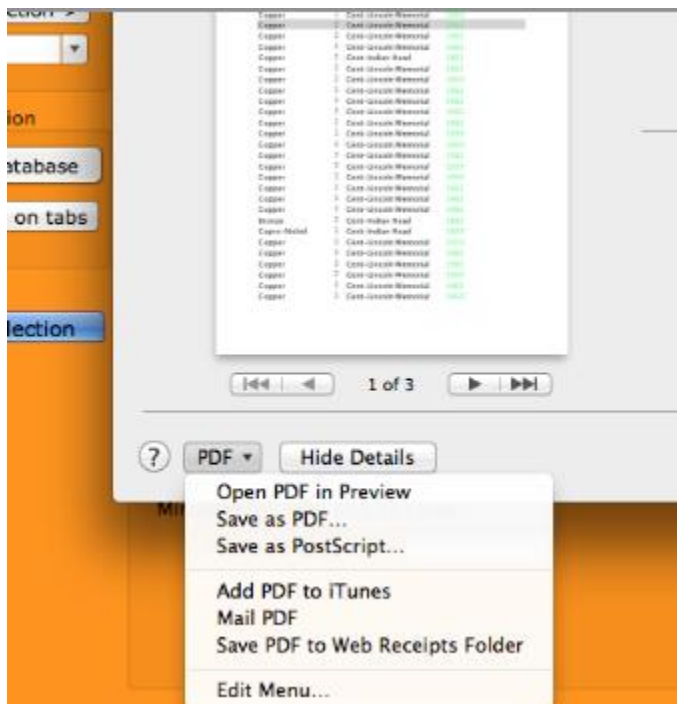
Once the listing contains the desired coins, formatting, sorting and filtering, click on the Print->Current Collection button to display the print dialog.

Chapter 17: How to Produce Reports as PDF Files

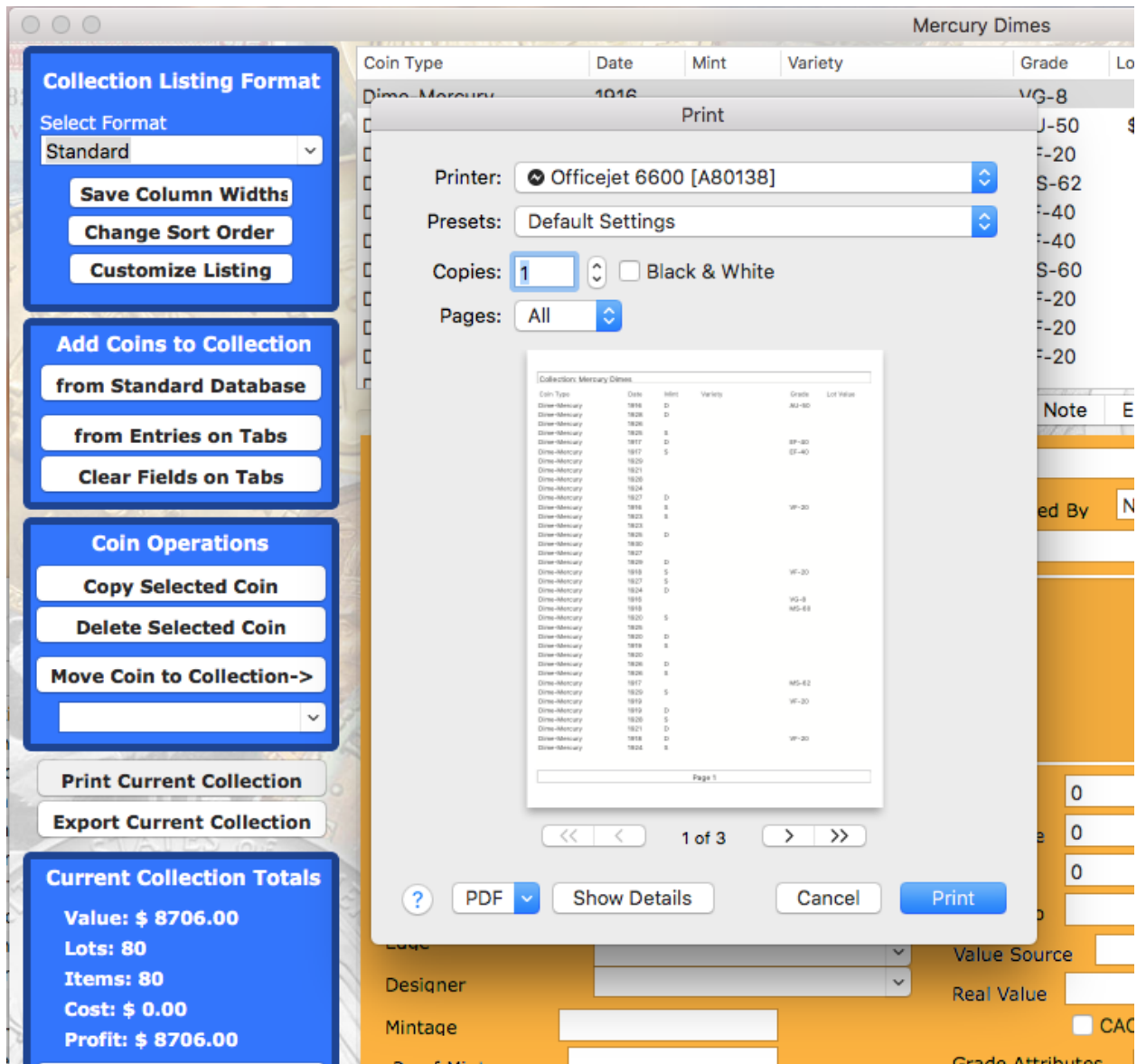
You may wish to output reports as PDF files for a variety of reasons. PDF files can be viewed and printed by a variety of third party programs. Thus you could email a PDF file to someone who could then print or view it on their computer. A very powerful use of PDF files is making your collection data viewable on mobile devices such as tablets, eBook readers and smartphones, all of which can handle them.

Creating a PDF file

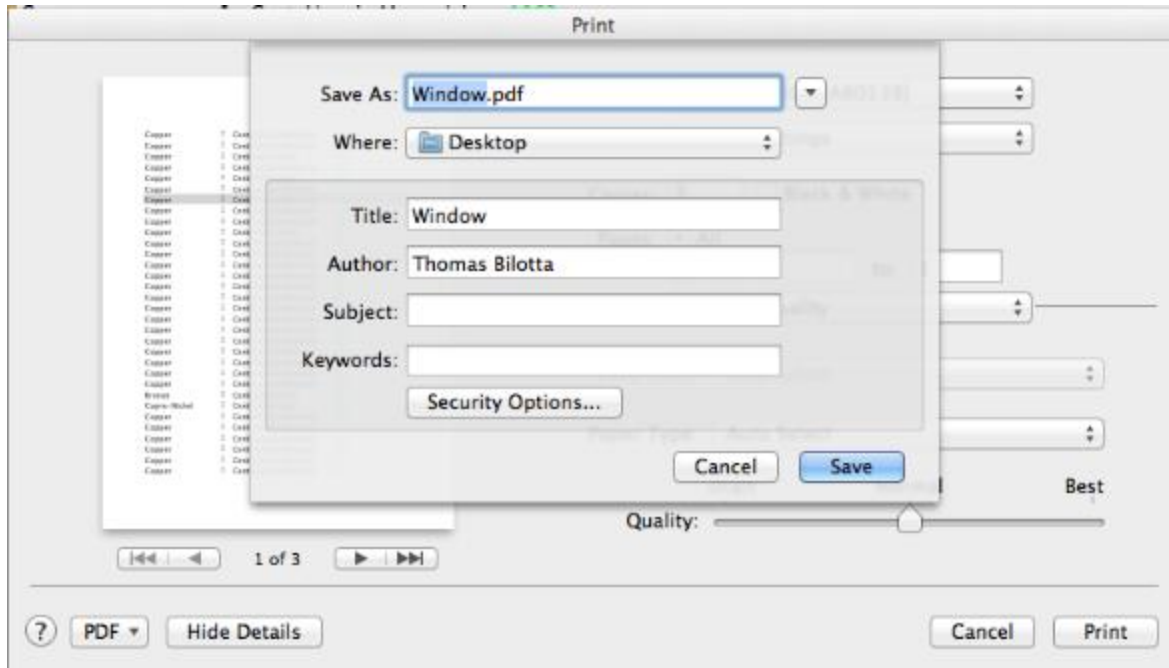
Open the collection you wish to print and then click on the "Print Current Collection" button along the left side of the Collection Listing. - this will display a print dialog allowing you to select the printer and other print parameters.



Click on the drop down in the lower left corner labeled "PDF" and you will have a number of options. Select "Save As PDF" and you will then be able to specify the location and file name of the PDF report file.

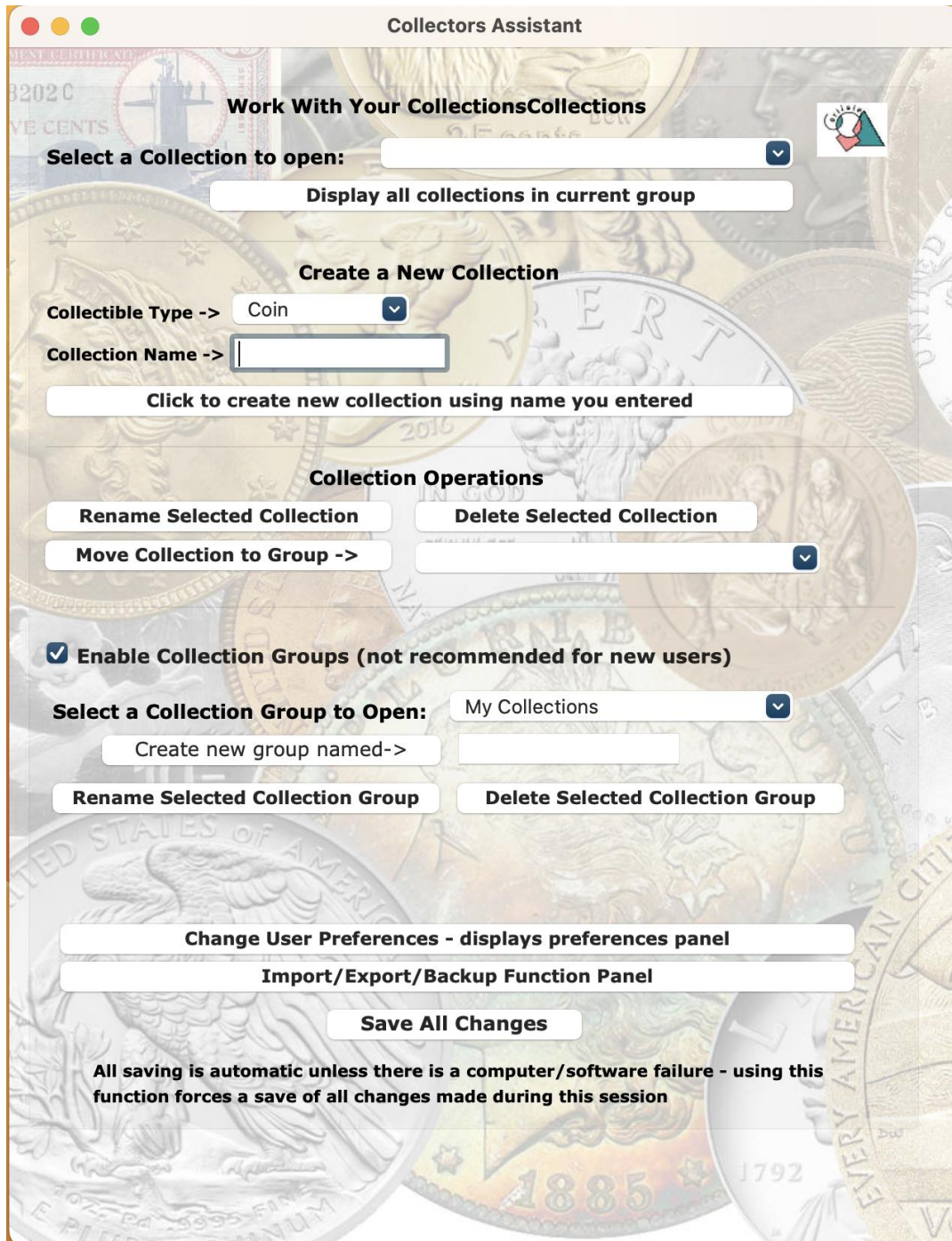


Enter the name of the file and select the desired destination and then click on "Save"

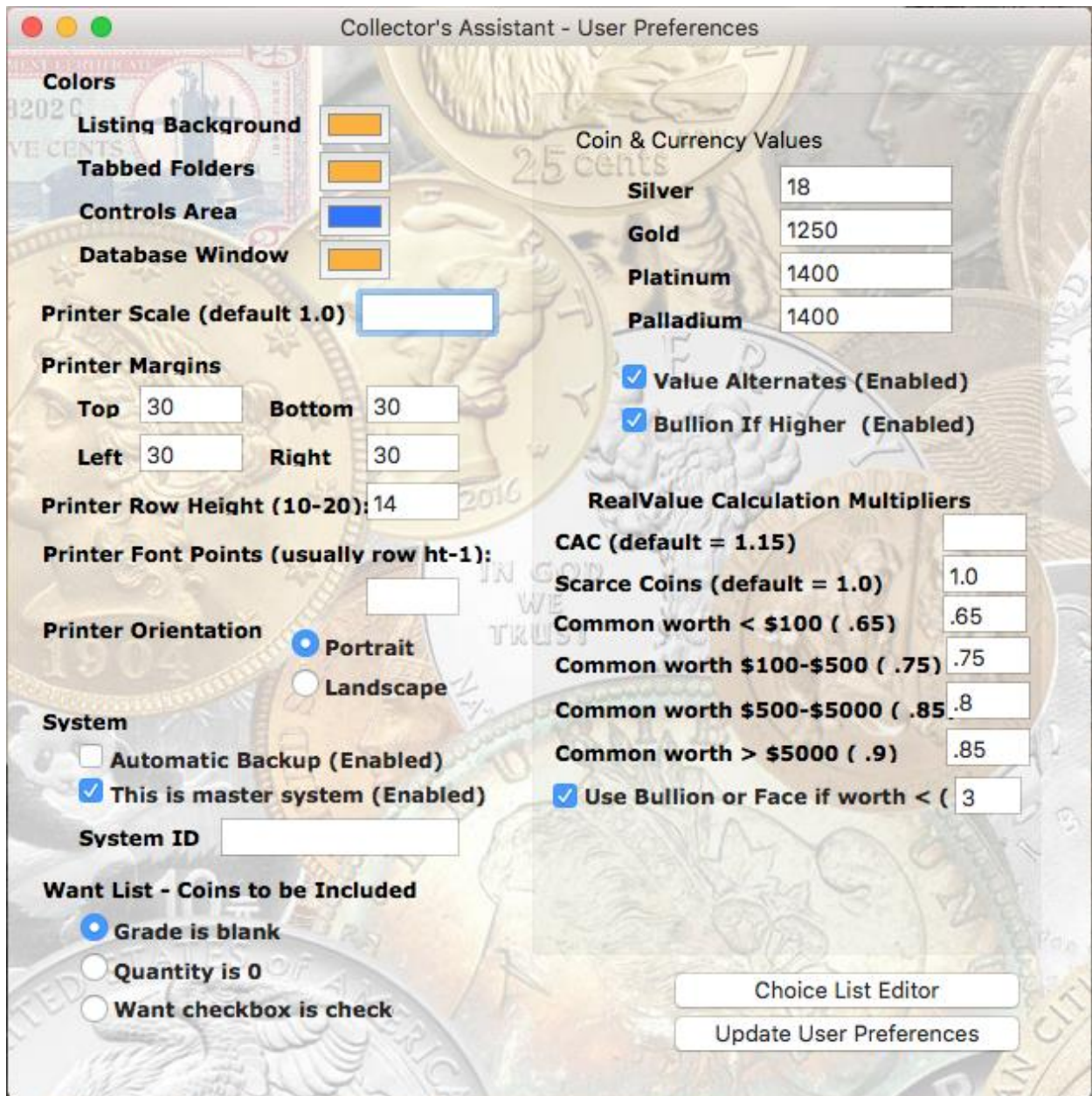


Chapter 18: Customizing the User Interface

There are many ways to customize the appearance and behavior of the User Interface. To do so you will want to display the User Preferences window by clicking on the button labeled "Change User Preferences" at the bottom of the Collector's Assistant controls area.



Once displayed, there are a variety of customizations you may make to the user interface



Window Sizes

Collector Window – The location and size of the Collector’s Assistant window used to display the currently selected collection you are working with.

Database window – The location and size of the standard Database window which

appears allowing you to add items from one of our standard databases

Colors

Listing Background - the color appearing in the background of the spreadsheet-like presentation of your data

Tabbed Folders - the background color of the tabbed folders (Item Detail, More Detail, Buy/Sell, Note and Estate)

Controls Area - the background color of the Collector's Assistant controls area which is always present

Database Window - the background color of the database window

System Identification

If you are running Collector's Assistant on multiple devices this field can be used to assist you in knowing the source of import and export data files

Printer Margins

Margins used for all print operations to account for printers which cannot print on the entire paper or to allow for hole punching, etc

Value Preferences

For coins and paper money, these preferences can affect value calculations

Spot prices for Gold, Silver, Platinum and Palladium - used for all coin bullion value calculations

Values Alternate and Bullion Values checkboxes - if Coin World values are not available for the current coins, determines whether or not Bullion and or Face Value may be used in its place for the Unit Value field

RealValue calculation settings

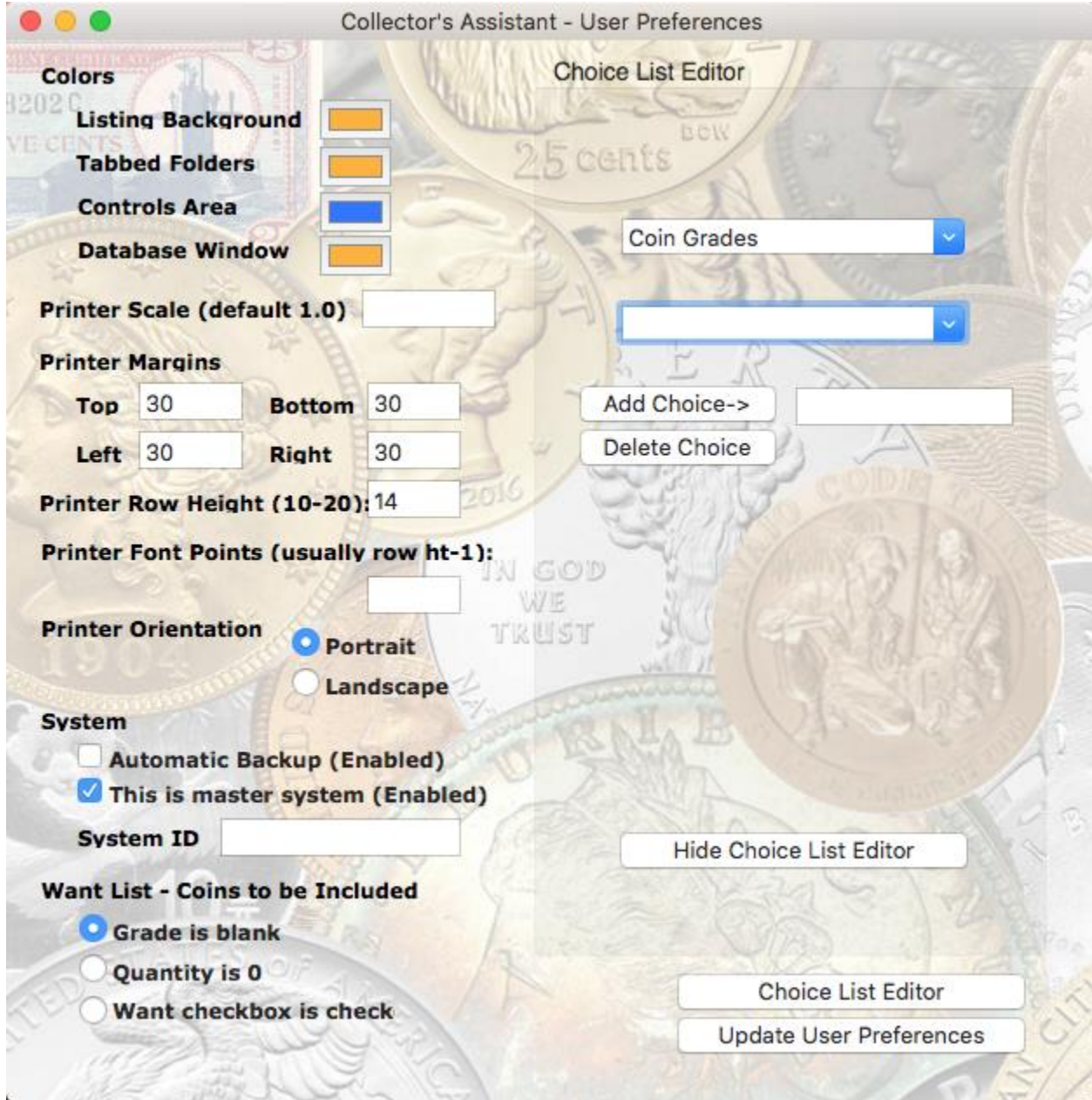
Want List Preferences

The basis for which a coin will be defined as wanted

Choice List Editor

In addition to setting preferences you may click on Choice List Editor which will enable

you to add and delete entries for all dropdown lists appearing in the Collector's Assistant user interface



Chapter 19: Attaching your own pictures to a coin in your collection

You may wish scan pictures of your own coins and attach them to coins in your collection which will then appear instead of our stock images.

The recommended image format is .jpg files. You may scan these or download them from the internet. All that is required is that you know where the picture is stored on your Mac.

Once you have a picture to attach, select the coin in your collection and click on the obverse or reverse image which will display it at greater size in a separate window.

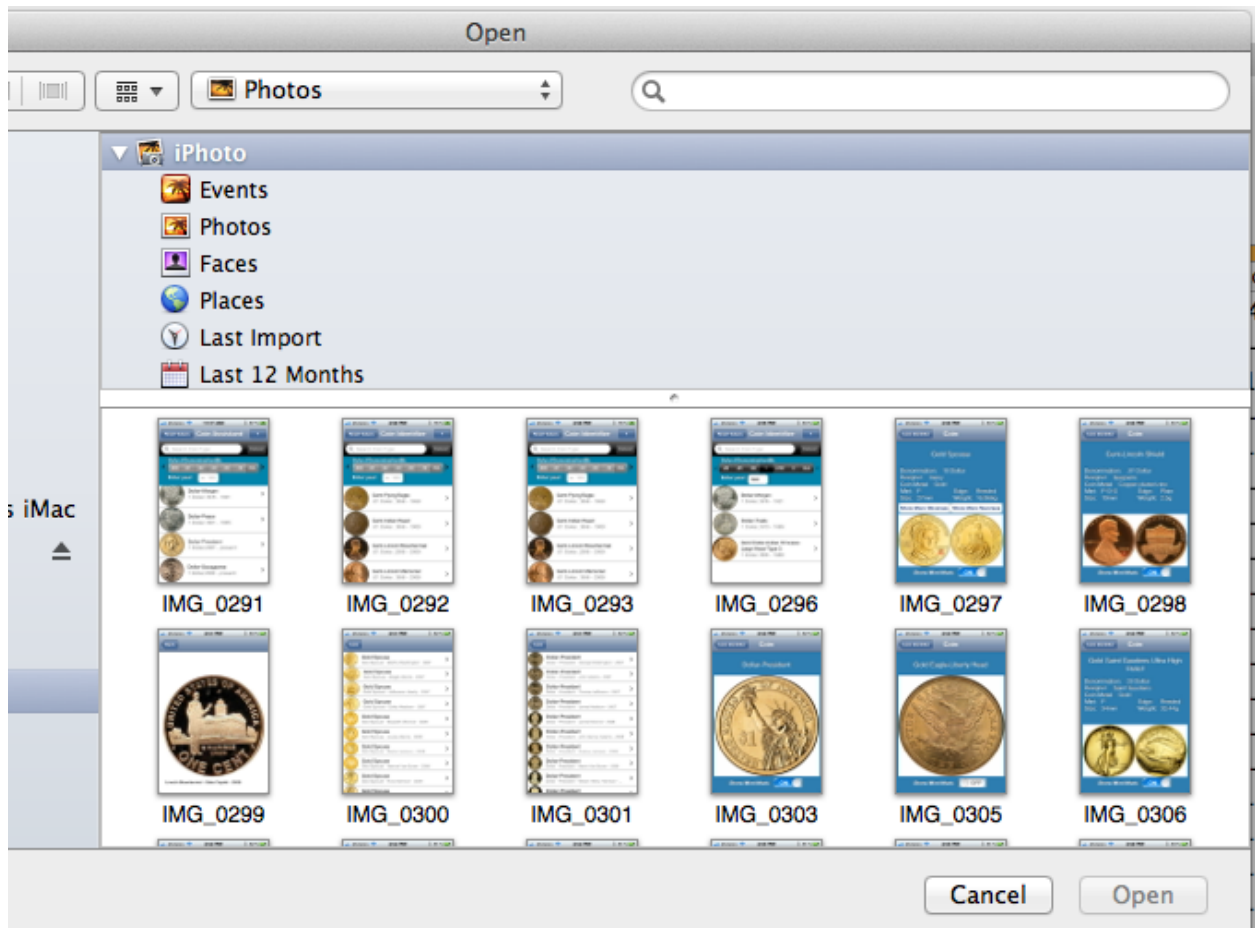
The screenshot shows a software interface for managing a coin collection. A 'Window' dialog box is open, displaying a large image of a 1857 Flying Eagle Cent coin. The background shows a table of coin listings and a detailed form for editing a coin's information.

Coin Type	Date	Mint	Variety	Grade	Lot Value
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			F-12	50
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			G-6	0.01
Cent-Flying Eagle	1858		Large Letters	VF-30	75
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	C-4	30
Cent-Flying Eagle	1858		Large Letters	VF-20	75

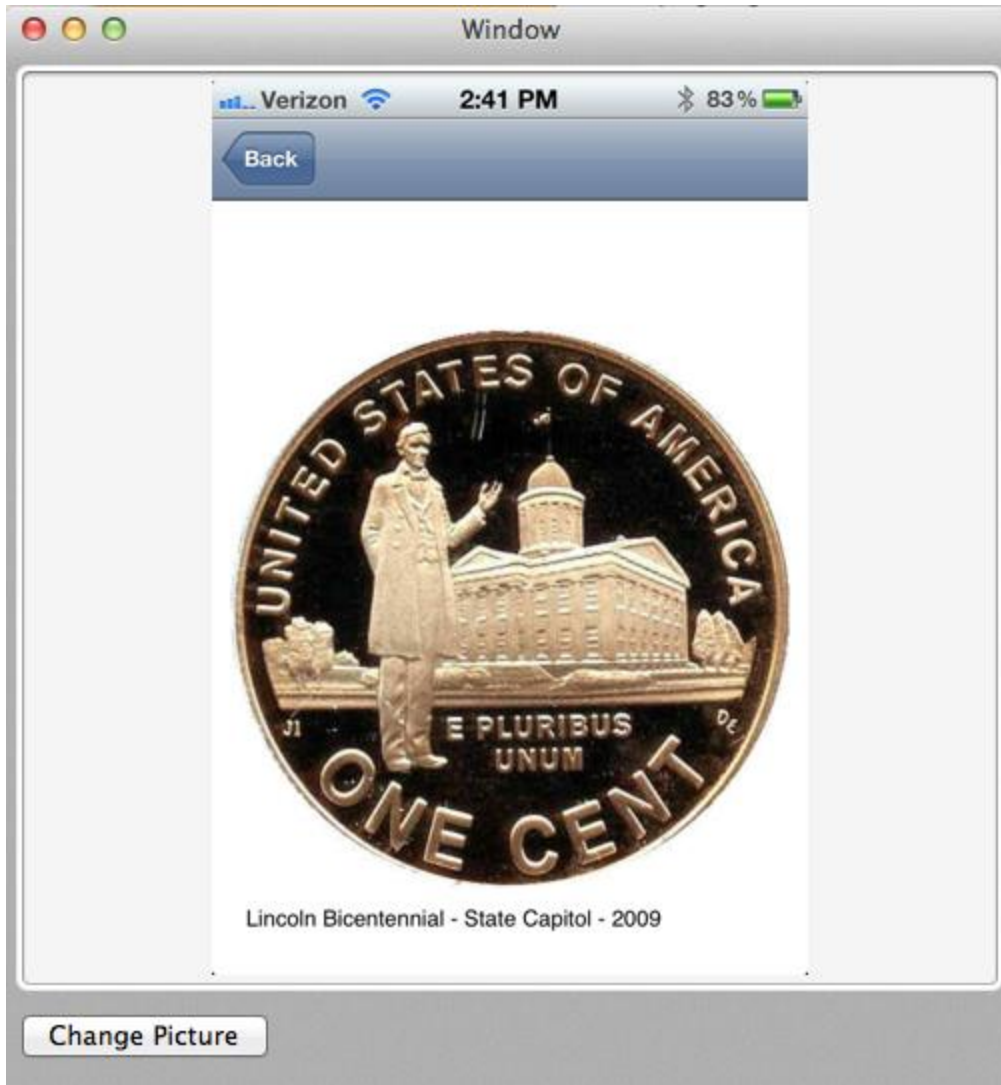
The detailed form for editing a coin includes the following fields:

- Grade: AG
- Certified By: RFC
- ID #
- Quantity: 1
- Units (Qty): coin (1)
- Unit Value: 0.01
- Lot Value: 0.01
- Value Info: Note: value shown is face value
- Value Source: Face Value
- Date: 2010

Next, click on the “Change Picture” button which will display a system browser allowing you to navigate to and select the picture.



Once you select the picture, it will appear in the magnified window



Then close the magnified window and select the coin again which will display the new picture.

Window

Coin Type	Date	Mint	Variety	Grade	Lot Value
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			VF-20	75
Cent-Flying Eagle	1857			F-12	50
Cent-Flying Eagle	1857			AG	0.01
Cent-Flying Eagle	1857			G-6	0.01
Cent-Flying Eagle	1858		Large Letters	VF-30	75
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	G-4	30
Cent-Flying Eagle	1858		Large Letters	VF-20	75

Item Detail More Detail Buy/Sell Note Estate

Country: United States Grade: AG

Denomination: 0.01 Dollar Certified By: RFG

Coin Type: Cent-Flying Eagle ID #: _____

Date: 1857 Mint: _____

Variety: _____

Coinage Metal: Copper

Weight: 4.666g Size: 19.3mm

Edge: _____

Designer: Gobrecht/Longacre

Mintage: 17,450,000

Proof Mintage: 485

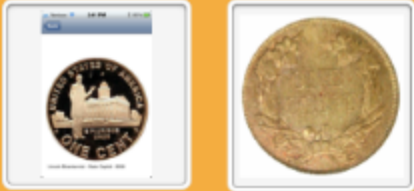
Quantity: 1 Units (Qty): coin (1)

Unit Value: 0.01 Manual Value

Lot Value: 0.01

Value Info: Note: value shown is face value

Value Source: Face Value Date: 2010



Note in this example, we did not take care to crop the picture prior to attachment. For coins, you should crop the images prior to attachment so that they will appear round and fully utilize the available area. Pictures may be of any size and B/W or color.

Pictures that are attached are copied into the Collector's Assistant container so that they will remain accessible and may be backed up by Collector's Assistant.

Chapter 20: Advanced Value Functions

Two new functions related to valuation have been added to version

Value Change tracking

A new information field Value Change has been added to the data entry screens. This calculated field is updated whenever the user applies a value update to all coins in all collections as a result of a market value update received from Carlisle Development. This new field may be added to listings for viewing or printing in order to assist you in identifying coins which have changed in value. The field is also available for sorting and filtering

RealValue Calculation

The values provided as a part of Collector's Assistant are Coin World retail values intended to identify replacement cost and/or insurance valuation. You may wish to estimate the proceeds of selling a coin (liquidation value). Version 2 provides a new field RealValue which uses a set of user parameters to calculate an estimated liquidation value.

The RealValue can:

- Adjust the retail value by a multiplier which is based on the range of values in which the retail value falls
- Adjust the retail value by a special multiplier if the coin has been identified as Scarce
- Set a threshold below which a coin will be valued at the higher of bullion or face value. This handles the case where low value coins are dominated by transaction costs.

The settings are adjusted using the screen illustrated below.

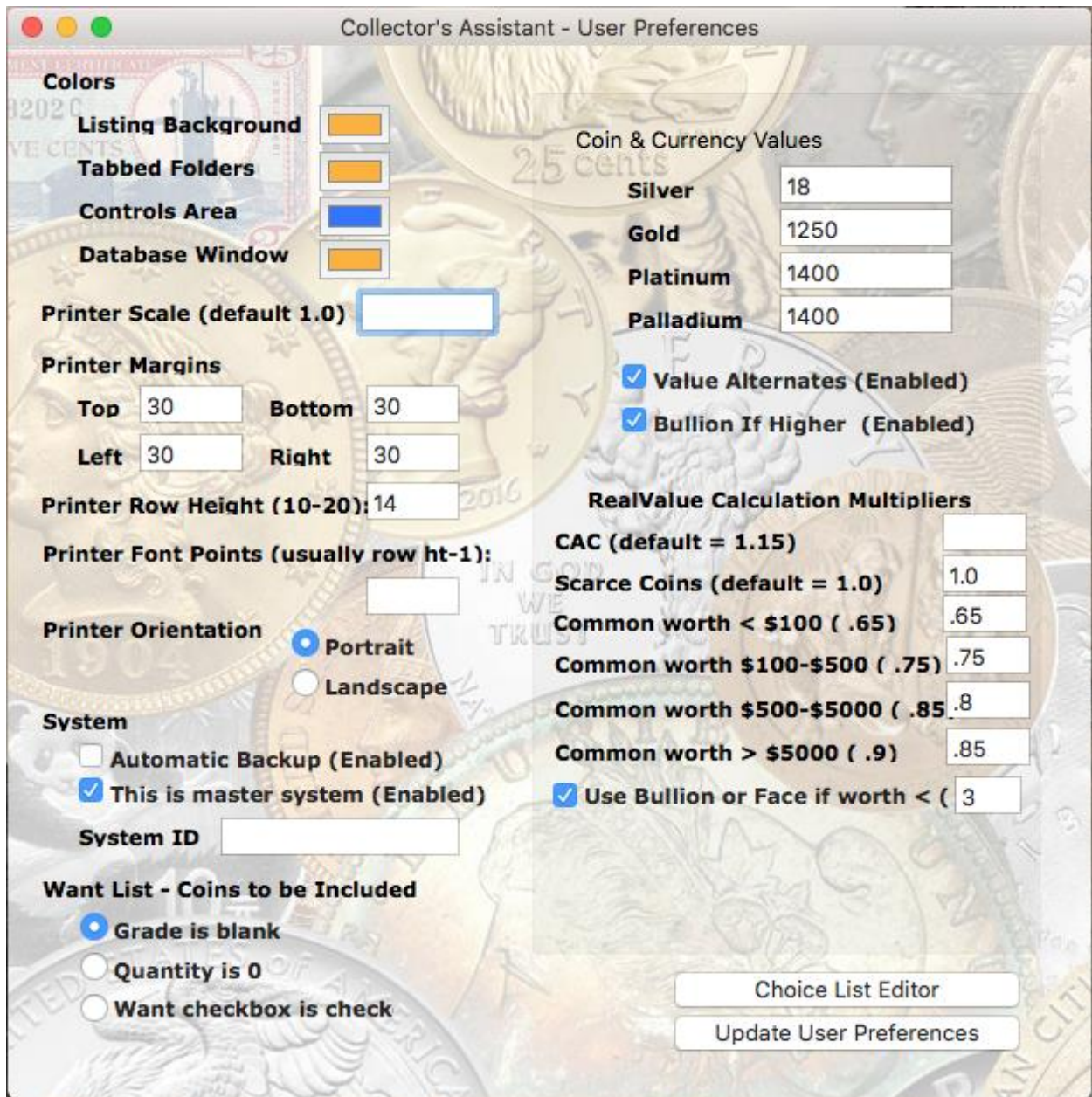


Figure 1 illustrates the User Preferences screen. The right hand portion provides values related preferences including the settings for the RealValue calculations

Coins that are identified as Scarce have their own multiplier (1.4 in the example shown), The user may then specify multipliers, usually less than 1.0 to be applied based upon what value range the retail value fall in. In the example shown, coins with a retail value of \$100-\$500 would be downrated by 20%.

Coins worth less than a user specified amount (\$5 in this example) would return the higher of bullion and face

Chapter 21: Customizing Data Entry Screens

Customization of Data Entry Screens

The standard interfaces of Collector's Assistant are quite extensive but there may be instances where a user has some additional information they would like to maintain.

In these cases, the user may add up to 10 information fields of their own definition including numeric or textual data.

These fields appear on the More Detail tab of the data entry folders.

Customization is accomplished by clicking on ,, on the main menu which will display a window with the layout of available custom fields. The user may then assign labels to these fields which will result in their addition to the user interface in the location shown.

User added fields enjoy the full functionality of the Collector's Assistant and may be included in listings and used for sorting and/or filtering.

On completion the collectibles interface is exported to a file CollectiblesCustomization.csv which may be reimported in the event of a system problem.

Figure 1 depicts the standard More Detail tab for the collectible coin showing three fields (Pop-PCGS, Pop-NGC and Old Value) from a previous customization. We have clicked on Customize->Data Entry Screen Customization displaying the yellow panel with the customizable portion of the More Detail tab

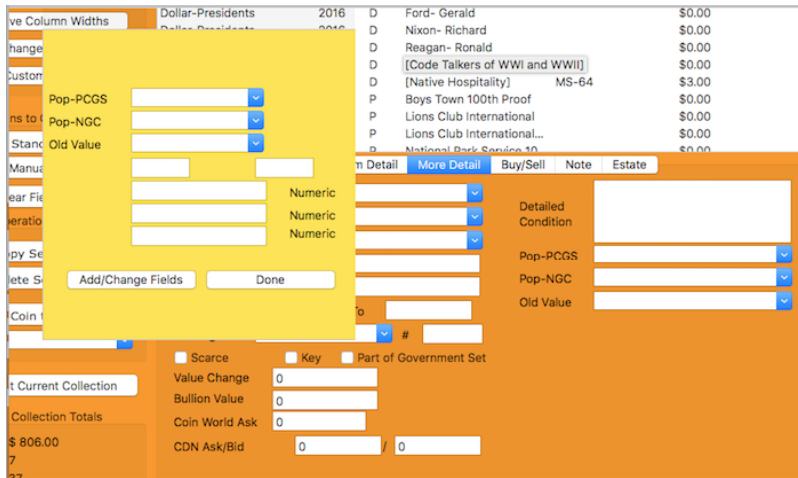


Figure 2 illustrates our modifications to the custom fields, renaming some and adding some new ones. After making our edits we click on Add/Change fields. Note the three bottom fields are numeric and the remaining fields hold text data

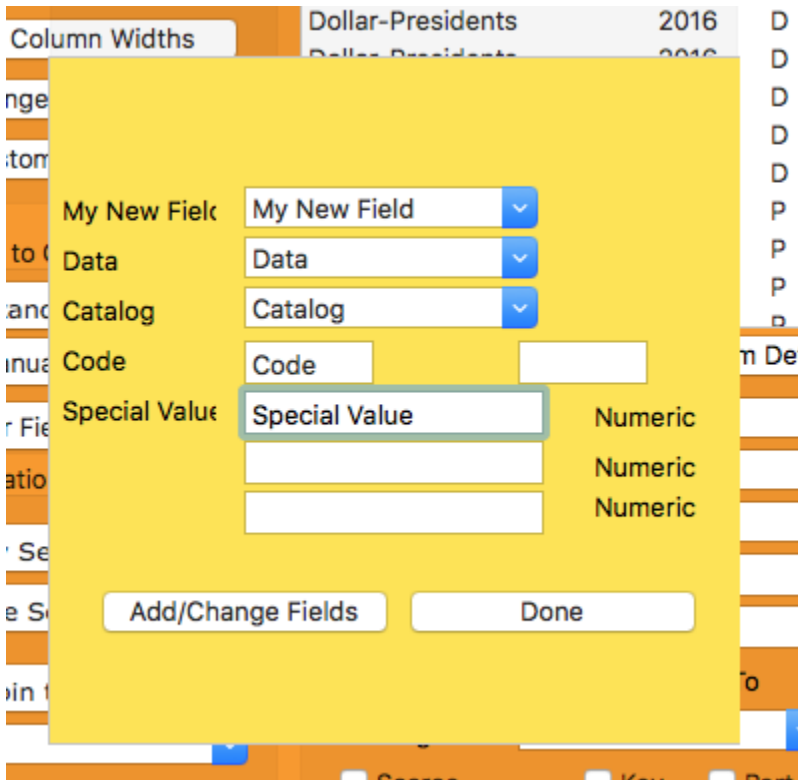
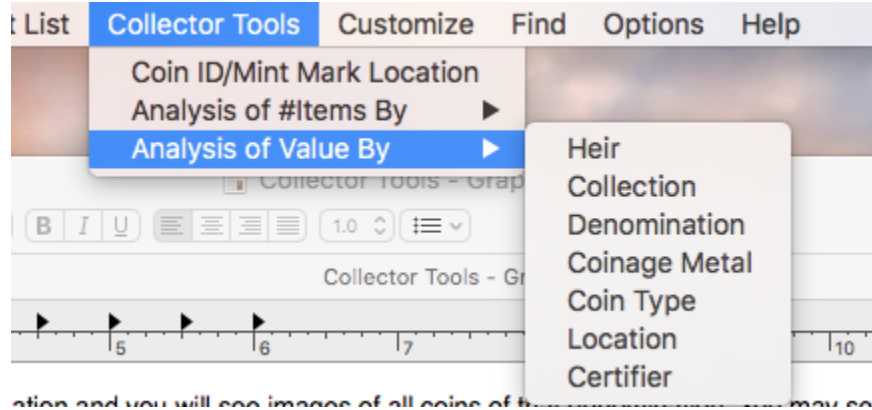


Figure 3 - illustrates the resulting More Detail tab.

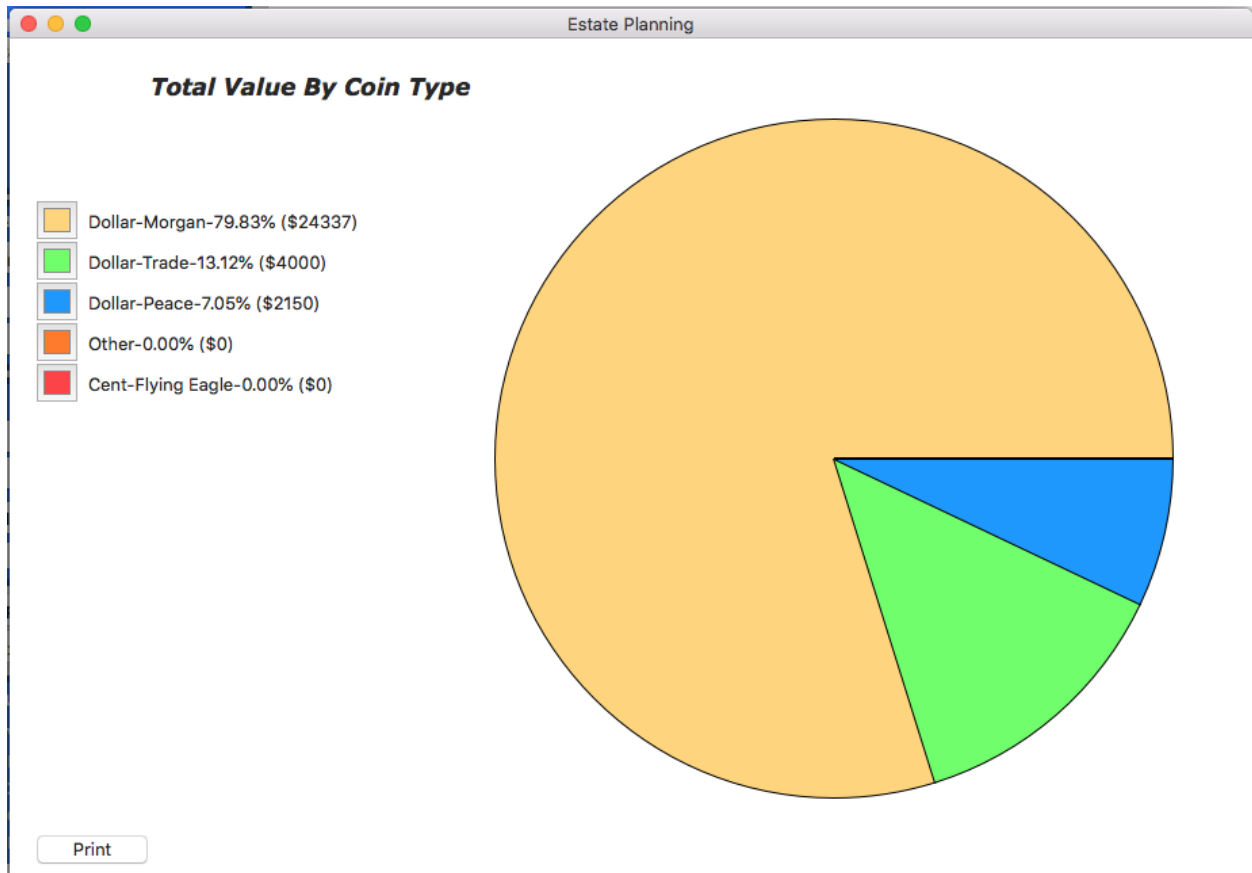
Item Detail		More Detail	Buy/Sell	Note	Estate
Empire	<input type="text"/>				
State	<input type="text"/>				
Ruler	<input type="text"/>				
Numismatic Code	<input type="text"/>				
Code 2	<input type="text"/>				
Date Range	<input type="text"/> To <input type="text"/>				
Catalog	<input type="text"/> # <input type="text"/>				
<input type="checkbox"/> Scarce	<input type="checkbox"/> Key	<input type="checkbox"/> Part of Government Set			
Value Change	<input type="text" value="0"/>				
Bullion Value	<input type="text" value="0"/>				
Coin World Ask	<input type="text" value="0"/>				
CDN Ask/Bid	<input type="text" value="0"/> / <input type="text" value="0"/>				
		Detailed Condition	<input type="text"/>		
		My New Field	<input type="text"/>		
		Data	<input type="text"/>		
		Catalog	<input type="text"/>		
		Code	<input type="text"/>		
		Special Value	<input type="text"/>		

Chapter 22: Graphical Analysis

Click on Collector Tools and then select Analysis of # Items or Values and you will see a list of parameter. Select one.



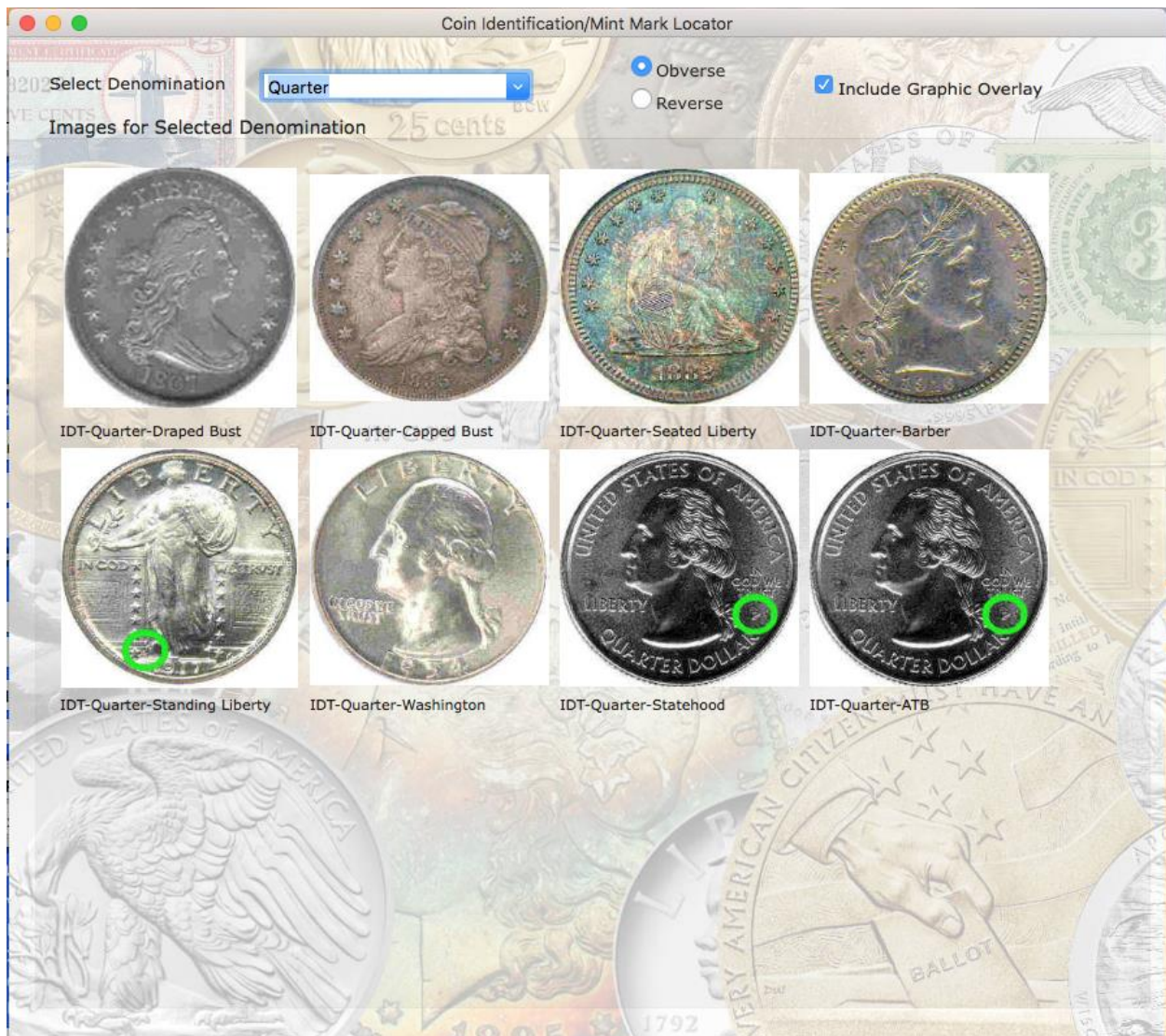
In this example we selected Coin Type and the pie chart illustrates the value by Coin Type. In this case Morgan Dollars account for almost 80% of our collection value.



Chapter 23: Coin ID/Mint Mark Locator

Click on Collector Tools then Coin ID/Mint Mark Locator on the Collector's Assistant Main menu and the Coin ID/Mint Mark Locator tool will display

It is organized by denomination and displays all coin types of the selected denomination. You may display obverse or reverse and include a graphic overlay showing mint mark location.



Section 4: Other Topics

Section 3 includes 6 chapters providing instruction on functions you will most likely want to use as you progress with cataloguing of your collection.

- Chapter 24: How to Export your collections
- Chapter 25: How to Backup your Collections and Customizations
- Chapter 26: How to Import Collections
- Chapter 27: Installing Updates to Collector's Assistant
- Chapter 28: Troubleshooting

Chapter 24: How to Export up your collections

Collector's Assistant supports two separate export mechanisms.

The first exports a comma separated file in the format needed if the data is to be transferred to Collector's Assistant Mobile Viewer on the iPad or iPhone..

The second export produces a comma separated columnar file containing the most commonly used information fields (date, mint, coin type, grade, cost, etc) . This file is human readable and also may be directly viewed in most spreadsheets and other programs allowing you to utilize your data in other programs.

Export of the file needed for CA Mobile Viewer

Below is the main Collector's Assistant control area which is always present. At the bottom is a button entitled "Import/Export/Backup Collections". Clicking on this button will expand the controls area to the right.

The expanded screen contains an option button to select backup, import or export. Select backup as shown below.

To create the export:

- click on the "Export All Collections" button
- the Finder will appear allowing you to select the folder in which the backup will be placed.
- navigate to the desired folder, select it and click on Open

The file CAAllCollectionsFromMac.csv will be placed in the destination folder and may be used for import into Collector's Assistant Mobile Viewer if needed



Export of the file which may be shared with other programs

- open any collection or click on Display All Collections
- Click on the button “Export Current Collection” -
- the Finder will appear allowing you to select the folder in which the backup will be placed.
- navigate to the desired folder, select it and click on Open

The file CACollectionExport.csv will be placed in the desired destination. This file may be directly opened using MS Excel as well as other programs supporting comma separated files.

Other Considerations

If it becomes necessary to use your backup to replace files, this must be done with great care as restoring files is not simply the opposite of backing them up.

Backing up is a completely safe operation.

Restoring files causes replacement of files used by the current installation with older files. Therefore since older data will be in use it is essential that only necessary data is restored.

To export your collections:

- click on the "Export All Collections" button
- the Finder will appear allowing you to select the folder in which the exported data file will be placed
- navigate to the desired folder, select it and click on Open

The file CAAllCollectionsFromMac.csv will be placed in the selected folder

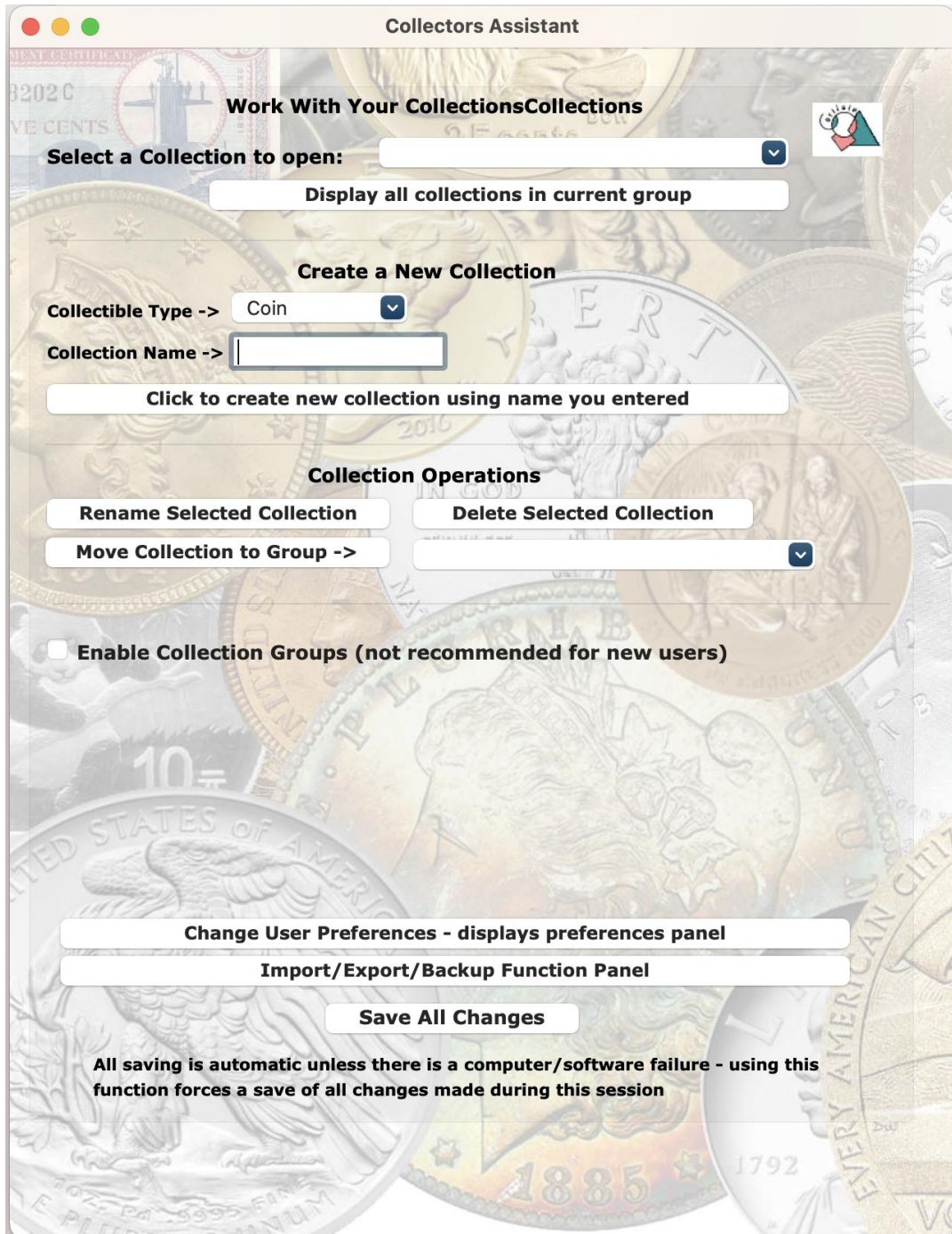
Chapter 25: How to Back up your collections and customizations

It is important to frequently backup your collections to assure you are protected against data loss. Carlisle Development recommends a regular backup process with the following guidelines

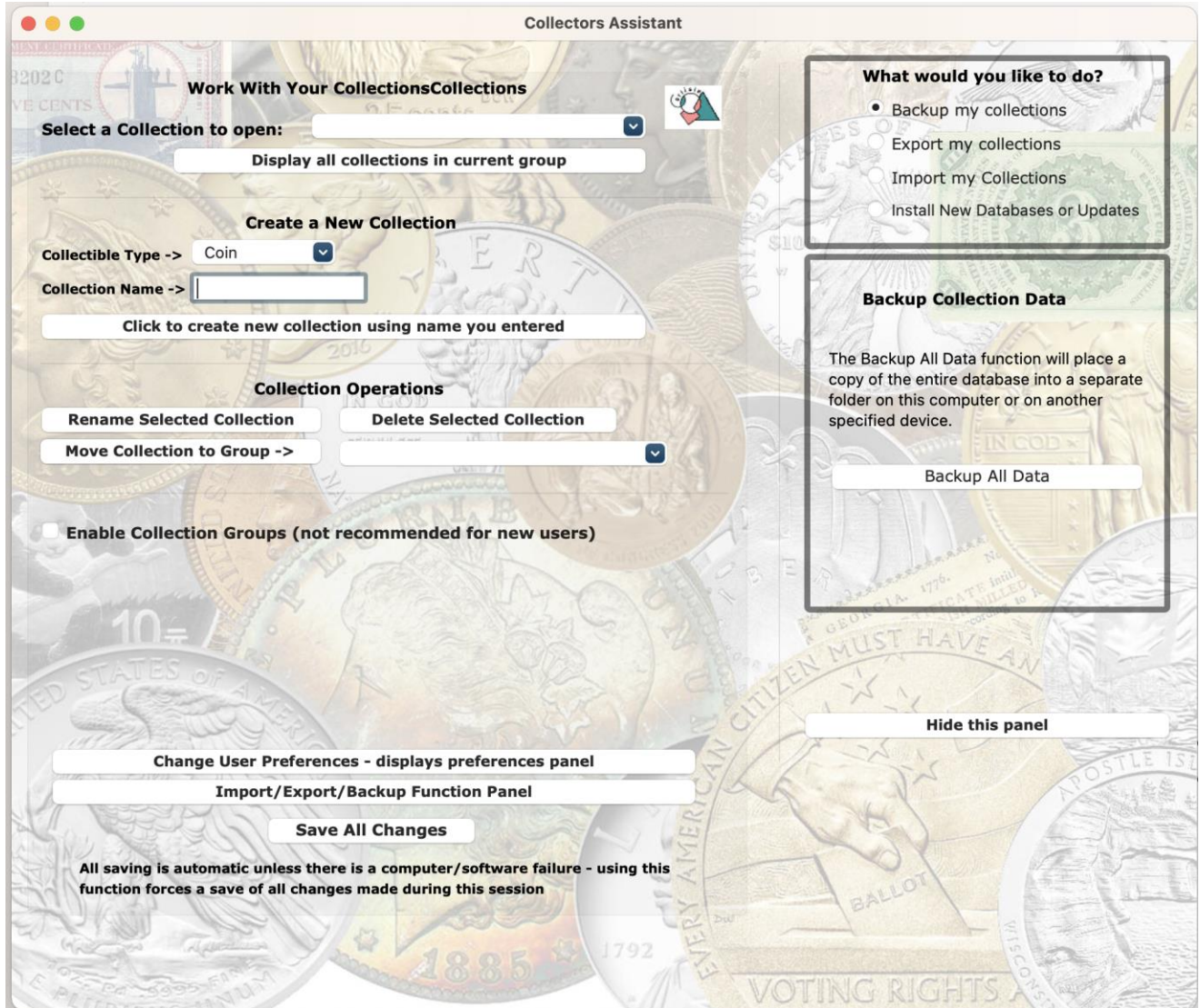
- Use a USB stick or flash drive as your primary backup media – a typical stick could hold 100+ backups.
- Always create a new folder for each backup, keeping old backups – this will provide the greatest protection against data loss in the event you are not immediately aware of a problem that has occurred.
- When creating a new folder for the backup, use a meaningful and informative folder name such as BackupJun13-2013 - this will enable you to quickly identify the most recent backup and also find older backups if needed
- CD is not recommended as a backup device as data to a CD is typically buffered in local disk space and written to the CD on ejection. In some cases, improper ejection and or other computer issues can cause the CD write not to occur, providing you with no indication of a problem
- We recommend backing up monthly (or immediately after major editing/additions)
- If you are using an automated online backup capability it is important that you understand what it is actually doing. For example is it backing up the critical Collector's Assistant files? How often does it back them up? How long are older backups kept? How do you recover files from the backup? Use of automated backups without a complete understanding of how they really work often leads to an unpleasant surprise when they are needed.

Backing up your data

Below is the main Collector's Assistant control area which is always present. At the bottom is a button entitled "Import/Export/Backup Collections". Clicking on this button will expand the controls area to the right.



The expanded screen contains an option button to select backup, import or export. Select backup as shown below.



To create the backup:

- click on the "Backup All Data" button
- the Finder will appear allowing you to select the folder in which the backup will be placed.
- navigate to the desired folder, select it and click on Open

The folder in which the backup is to be placed must already exist prior to the backup operation. This folder will be populated with all files and folders needed to recreate the current state of your Collector's Assistant. This includes a complete copy of the database file as well as user added images and other customizations

Other Considerations

If it becomes necessary to use your backup to replace files, this must be done with great care as restoring files is not simply the opposite of backing them up.

Backing up is a completely safe operation.

Restoring files causes replacement of files used by the current installation with older files. Therefore since older data will be in use it is essential that only necessary data is restored.

To restore a backup you will need access to hidden files and folders.

Chapter 26: How to Import Data into your collections

The data import facility is primarily available as a 1-time import of data from Collector's Assistant Windows version. It is not intended for import of data from CA Mac or other programs.

The data to be imported is supplied in a comma separated file generated by Collector's Assistant. It contains a list of coins to be added including information as to which collection and or collection group to which they belong.

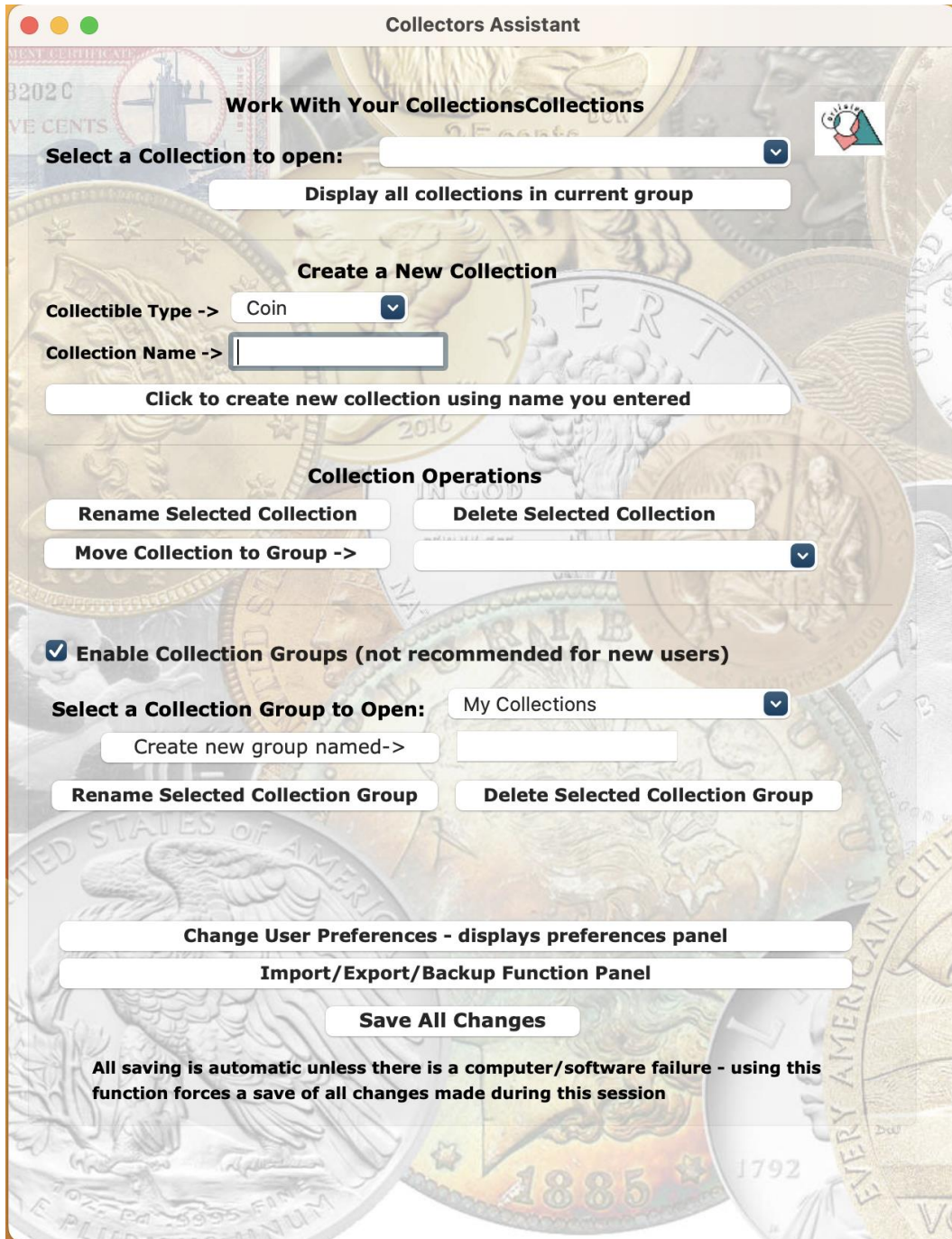
At the beginning of the import, the file is pre scanned to determine all collections which contain coins which are referenced by this file. **ONLY COLLECTIONS** referenced by this file will be affected. For example, if you currently have two collections on this Mac named Morgan Dollars and Peace Dollars and the imported file contains coins belonging to Peace Dollars and a new collection Eisenhower Dollars, the existing Morgan Dollars collections would not be affected.

In this example:

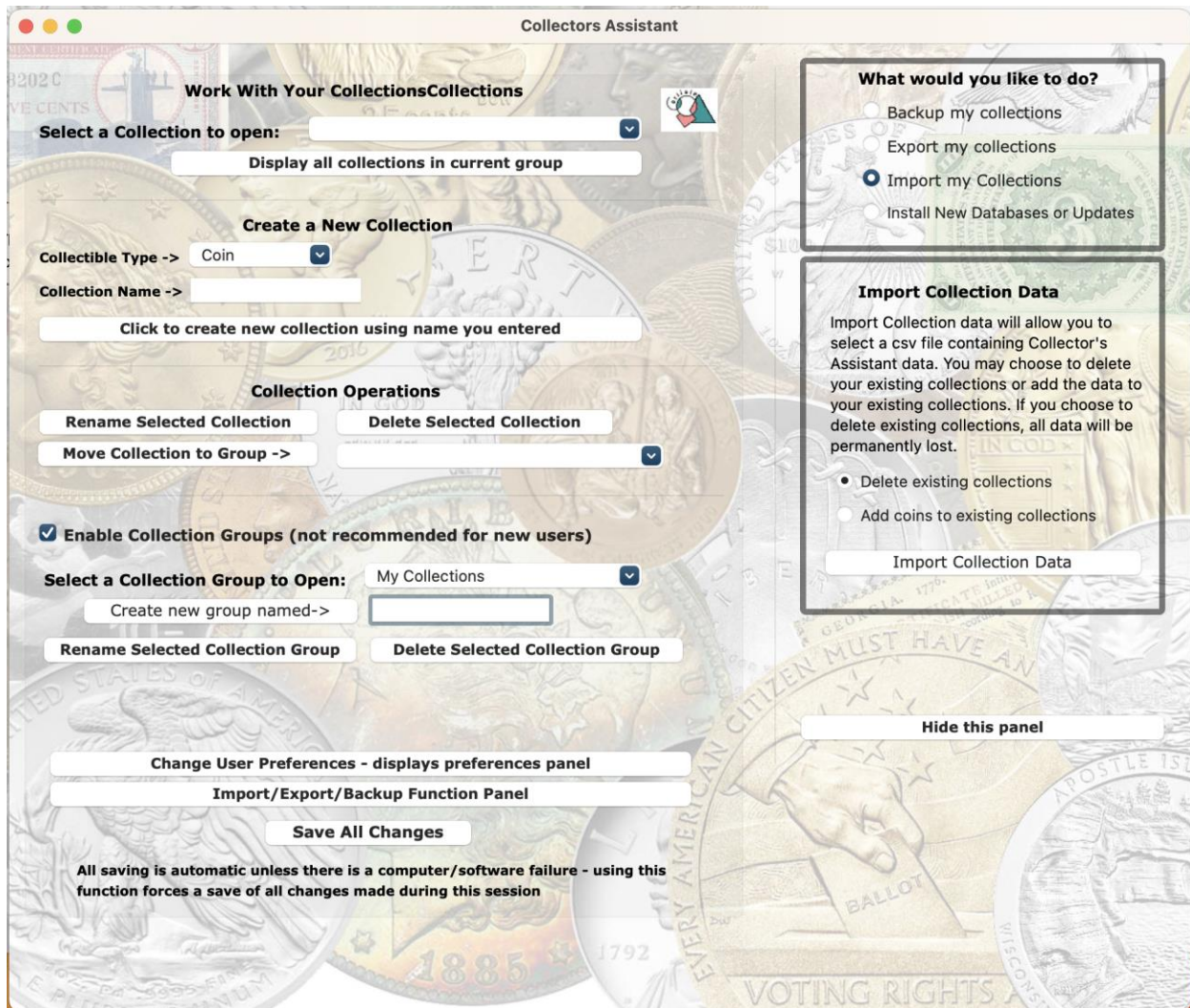
- The Morgan Dollars collection would not be affected
- The Eisenhower Dollars file would be added
- The Peace Dollars would either be replaced with the coins in the imported file or the coins would be added to the existing Peace Dollar collection depending on your selection of the option prior to starting the import.

Importing collection data

Below is the main Collector's Assistant control area which is always present. At the bottom is a button entitled "Import/Export/Backup Collections". Clicking on this button will expand the controls area to the right.



The expanded screen contains an option button to select backup, import or export. Select "Import My Collections" as shown below



Importing collection data:

- select either Delete Existing Collections or Add Coins to Existing Collections. If you select Delete Existing Collections, any collections references by the imported file will be deleted and completely replaced by the coins in the file. If you select Add Coins to Existing Collections, the coins in the file will be added and all existing data preserved.
- click on "Import Collection Data"

Other Considerations

Since you may be replacing a substantial amount of data, it is strongly

recommended that you backup your existing installation BEFORE importing data.

It is generally best to keep things simple and establish a "master" relationship such that one of your Collector's Assistants always serves as the primary data source and exports it out to other Collector's Assistant. Use of multiple devices without a clear "master" can result in difficulty keeping things straight.

Chapter 27: Installing Updates to Collector's Assistant

If you subscribe to our internet update program you will occasionally receive files intended to update listings and/or market values. The email sent from Carlisle Development will incorporate install instructions.

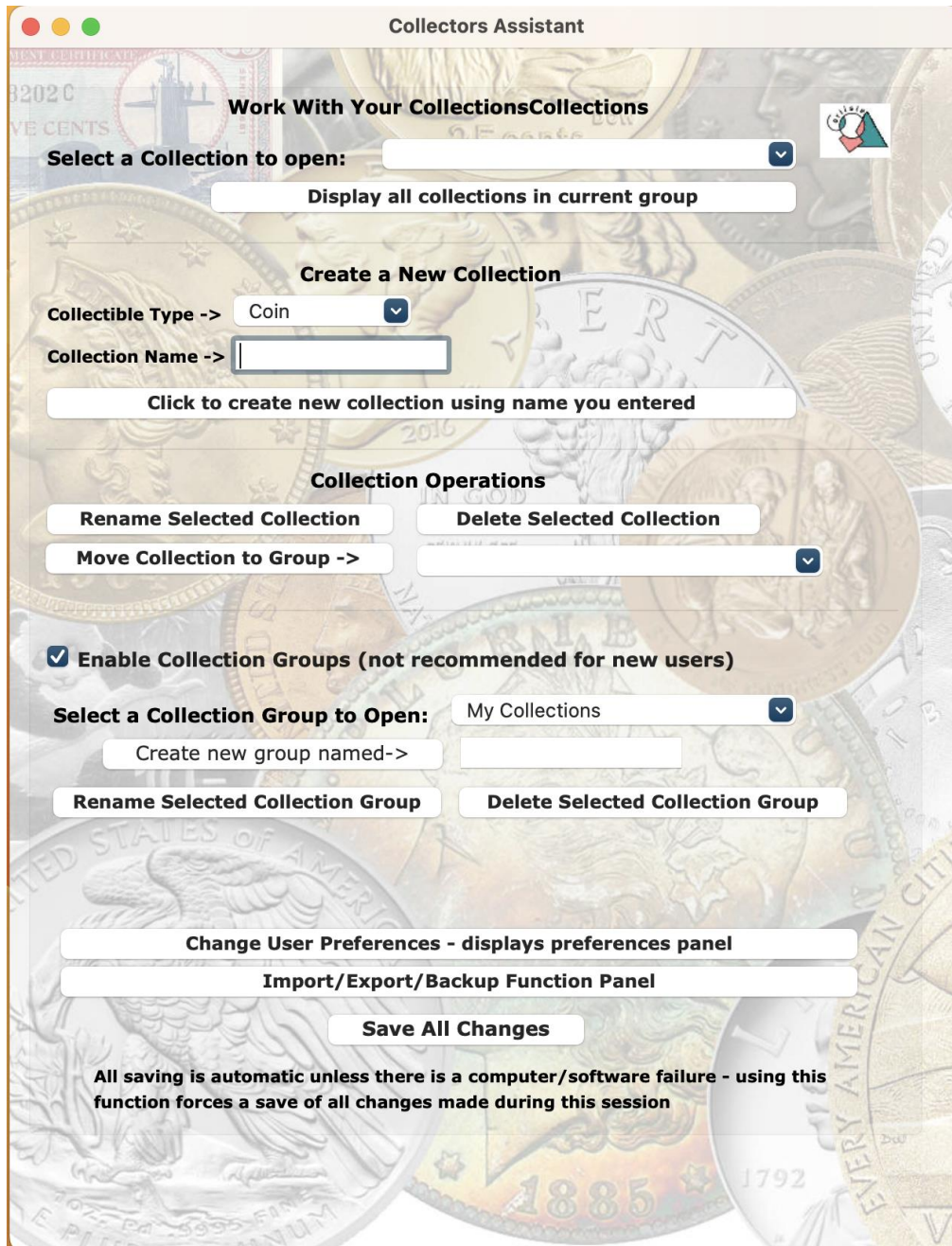
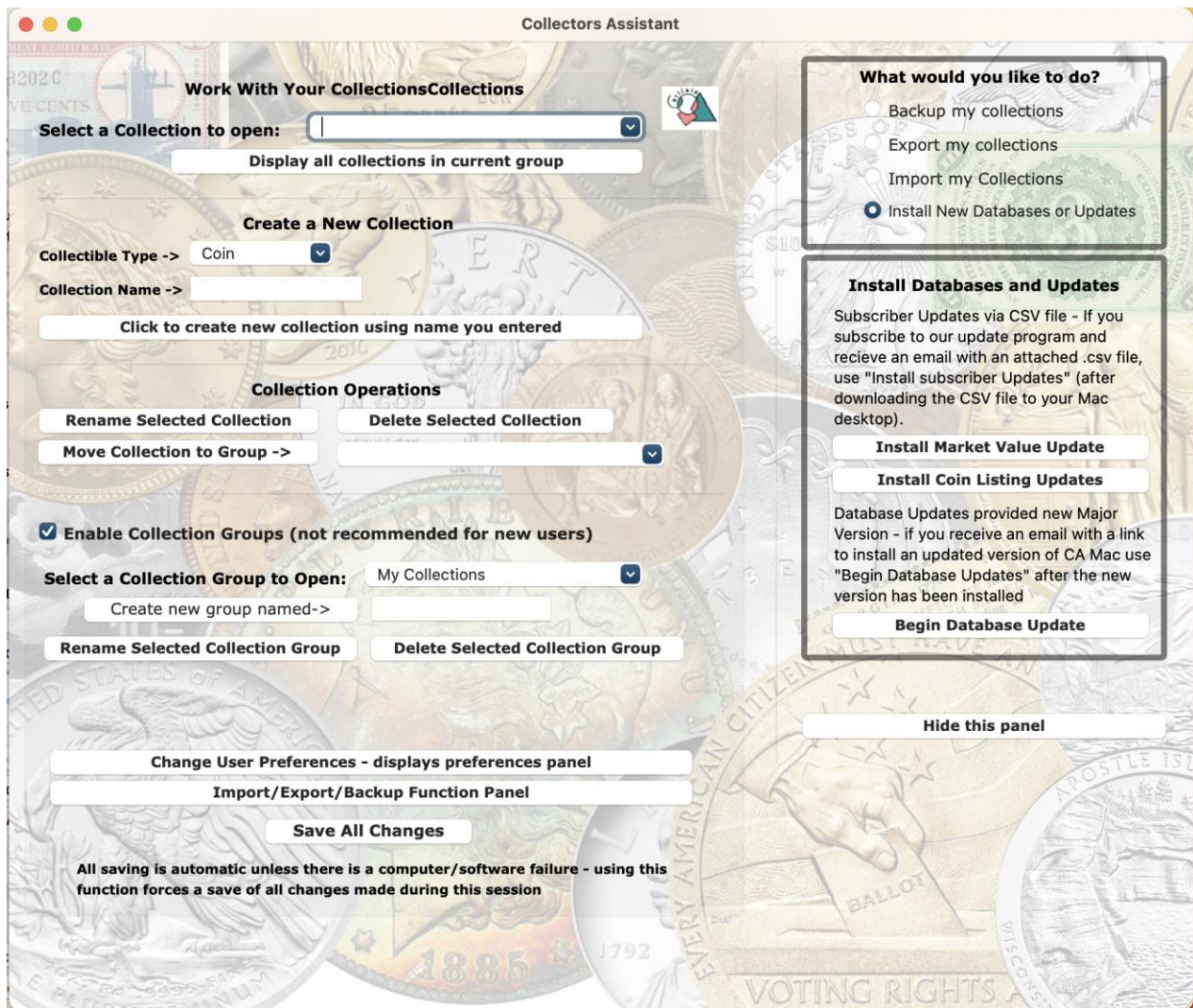


Figure 1 illustrates the main Collector's Assistant window, click on Import/Export/Backup Collections to display the function panel below



Click on Install New Database Updates to display the panel used to install the files. Note this panel can also be directly reached from the Options choice on the main menu

Depending on whether you received a file containing coin listing updates or market value updates you should click on Install Market Value Updates or Install Coin Listing Updates. You will then be directed to locate the file which you downloaded from the email. Once located the update will begin usually taking 5-15 minutes.

The Begin Database Update choice is used to apply database updates received with a major new version of Collector's Assistant for Mac OS/X such as version 2 which includes 2017 data.

Chapter 28: Troubleshooting

Collector's Assistant has robust error handling intended to prevent unexpected system exits. Should you encounter an unexpected exit, most likely restarting the Collector's Assistant will allow for normal operation. (You may, however, have lost edits made since the last autosave or "Save All Changes" function).

If you restart and are not able to proceed normally, we would advise the following:

- Do not reinstall - this is very seldom necessary and usually a waste of time (an exception is when you experience an obvious major system crash, lightning strike, etc).
- Send an email to Carlisle Development tech support (support@carlisledevelopment.com) The email should be as detailed as possible with regard to what you were doing when the crash occurred and what you are no longer able to do.

The more detailed information you provide, the quicker response you will receive. A message with the content "Help" will result in a response requesting detailed information resulting in a delay in resolution of your problem.

For other issues which arise when you believe Collector's Assistant is mis-operating, we again recommend an email to tech support with detailed description of the issue.

Tech support is also available via phone at 978-369-4908, however this is a callback line which will usually require you to leave a voice message to which we will respond during 8:00-5:00 EST Monday-Friday. Email responses occur 7 days per week over extended hours and will result in the quickest response to your issue.

Restore from Backup

If you believe you have a need to restore your data from a backup we recommend email contact to Carlisle Development with a detailed explanation of why and also how recently you generated a backup and CSV export. Usually surgical restore operations, which require a detailed understanding of the situation, will result in minimum loss of recent changes.

Chapter 29: Modify All

A new choice Edit Operations has been added to the main menu. This has three subchoices.

Copy/Paste text – both supported by the standard keyboard shortcuts (cmd-c and cmd-v)

And a new function call Modify All which allows common edits to a group of selected coins.

To modify more than one coin, select multiple coins using cmd-click or shift-click which will cause all fields in all tabs to be blank. Then enter data in any field for which you want to change all coins and click on Edit Operations then Modify All. There is no undo on this function so it is advised to take a backup before use. This is available only for certain information fields: grade, certified by, seller, buyer, purchase date, detailed condition, note, container, location, sale date, value date, value source, value info,