

EzCoin for Windows

Version 2.0



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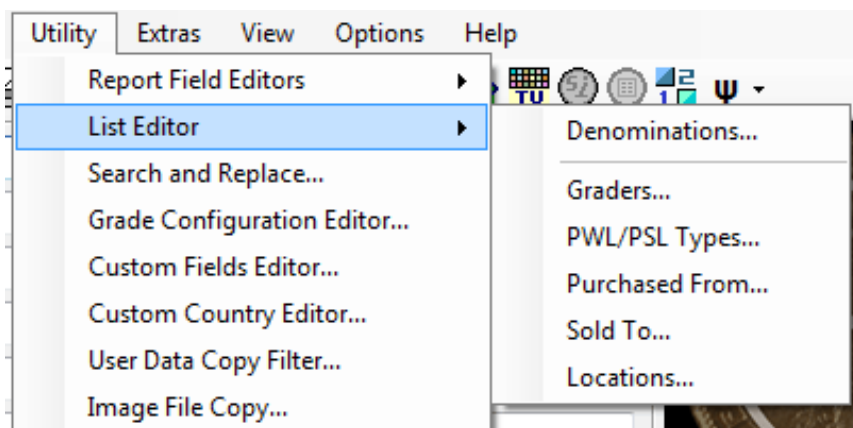
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Introduction

Welcome!

Thank You for purchasing EzCoin. Should you have any suggestions, questions, or comments please write to us at the address on the front of this package. If you have any requests for enhancements that would be nice to have., please let us know and we will try to incorporate any useful ideas into future releases. That's how EzCoin has grown to be the mature product that it is.

If you like EzCoin, please tell your friends about us. Dealer inquiries are welcome. If you find any errors or omissions in the documentation, please let us know. We're here to help.

There are many new features in this release of EzCoin. For those of you who are upgrading from a previous version, please read the quick start guide or the following section on Importing from prior versions of EzCoin.

http://www.pcvu.com/DEMOS/ezcoin/QT/EzC2_QSG.pdf

Please note our E-mail address is mariost@shaw.ca or ezcoin@ezstamp.com. It is the fastest and easiest way to get help if you need it (other than Reading the Manual). Our web site is located at www.stamptools.com and you can also reach us at (705) 254-6201

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I wish to thank my family for enduring the 2 years of continuous work that has gone into this version of EzCoin. My wife Paula, my children Theo, Sarah & Erinn have all contributed in many ways from testing, proofing and their encouragement. Their love and encouragement and most of all, their patience with me, has been of immense value in keeping me going.

EzCoin v2.0 is a significant achievement, and my thanks to all of the beta testers, especially Wayne, Daryl & Bruce, for their hard work and efforts to achieve the goal. It has been great working with you all! Thank you very much for all your help and support! The feedback from everyone has been extremely positive and much appreciated.

To Alan, my great friend, who has gone beyond the call of duty and friendship during the re-write of EzCoin, I thank you with all my heart. Alan's countless hours, revisions, drafts and most of all his absolute desire to deliver the best, have been a great inspiration. His professionalism, knowledge and expertise are everywhere in EzCoin. No detail was too small to overlook. Without Alan, v8.0 could not have taken place.

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System Requirements

Operating System Support

	Windows XP	Windows Vista	Windows 7	Windows 8
32-bit	✓	✓	✓	✓
64-bit	✓	✓	✓	✓

Note: As Windows XP is no longer supported by Microsoft, SoftPro can't ensure the reliable operation of EzCoin within this operating system if enhancements or extra features are added to the application in the future which will require Windows Vista at minimum. It's recommended to install EzCoin on at least the Vista platform, to ensure ongoing support from both SoftPro/EzCoin and Microsoft/Windows.

RAM	As much system memory as needed to comfortably run EzCoin within your installation of Windows. A minimum of 1 GB is required, but 2 GB or more provides the best performance
Video	EzCoin is designed to run at a minimum resolution of 1024 x 768 pixels, with a minimum of 256 colors. Higher resolutions are recommended for using the secondary support windows, such as the Coin List and Thumbnail Viewer.
Disk Space	Approximately 75 MB of hard disk space is required for Canada & USA country files. An additional 150 MB of disk space is required to copy pre-supplied images to your system's local disk drive (this is optional but recommended). Additional pre-supplied country files and custom country files will require additional space.
CD/DVD	A CD, DVD, or BluRay disc drive is required for installation.
Third Party Software	Adobe Acrobat reader or a compatible PDF document viewer is required to view the printable version of the manual. FREE Software downloads are available from www.adobe.com
Additional	An online connection to the Internet is required to access the Free updates feature of EzCoin. An Internet browser is required to use the eLook™ feature. EzCoin makes use of Microsoft database technology to store country data and EzCoin configuration settings. This software is installed by the EzSetup application to the EzCoin installation path.
Printer	A Windows compatible printer and associated driver software must be installed on your system to print reports. EzCoin can print reports in color with images, if your printer supports color output.
Microsoft .NET Framework	EzCoin was built using the Microsoft .NET Framework, version 2.0. Your installation of Windows must have at least version 2.0 of the framework installed (Vista and Windows 7/8 generally have this installed by default). EzCoin is compatible with higher versions (3.x and 4.x) of the framework. Free downloads of the framework can

	be found on the Microsoft website at www.microsoft.com
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Additional Online Help

Our website will be regularly updated with the latest information about updates, additional modules and databases and other pertinent information.

We will be providing online video tutorials to guide you through the different tasks in EzCoin from how to backup and restore, how to add your own images and varieties and may other topics.

We also have the Quick Start Guide available on our site at

http://www.pcvu.com/DEMOS/ezcoin/QT/EzC2_QSG.pdf

This guide describes the basic functions and features what you will use on a regular basis and gives you an overview of some important features.

We also maintain a FAQ (Frequently Asked Questions) page on our site.

The **Tips of the Day** feature can be accessed anytime from the **Help** menu in EzCoin.

Support, Questions and Comments

Technical Support: Many of the most commonly asked questions about our products are available on our website in the FAQ (Frequently Asked Questions) or Support pages at <http://www.StampTools.com>.

If you still have questions after having read the product manuals, guides or on-line help, please contact us. We welcome any questions, comments or suggestions you may have about our products. Customer service and prompt attention to your needs is a priority at SoftPro.

Telephone / Fax 705-254-6201

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Sault Ste. Marie, Ontario
Canada P6A 0B2

Questions / Support ezcoin@ezstamp.com

Priority Remote Support

We are also pleased to offer **Priority Remote Support** to our customers so that we can Securely Remote into your PC & assist you in solving problems or questions you may have. This can also be used as a training session to demonstrate how to perform certain functions or simply if you would like us to use our expertise to train you to use our software more effectively.

Here's how it works.

- Contact us and ask for **Priority Remote Support**. We will set up a time , usually right away. You MUST have internet access to use this service. Once the Remote Control Software is installed on your PC, you will be provided with a user ID & password for this session. We will need these codes to initiate the session
- We will contact you via phone or email, & then we will take control of your PC to solve issues or demonstrate what you need help with. You will be able to watch everything we do and ask any questions that you may have. You can close the connection at any time.
- Is this safe and secure? Absolutely. The entire connection is encrypted and safe and used by large corporations worldwide.
- To initiate a **Priority Remote Support** session, please call us at 705-254-6201 or email us at <mailto:techsupport@ezstamp.com>
- Then click on the link below to begin the remote control session. Once initialized, you will see a partner ID & a password (auto generated).

<http://get.teamviewer.com/SoftPro>

Click on the above link to begin after you have contacted us

Additional Online Help

Our website will be regularly updated with the latest information about updates, additional modules and databases and other pertinent information.

We will be providing online video tutorials to guide you through the different tasks in EzCoin from how to backup and restore, how to add your own images and varieties and may other topics.

We also have the Quick Start Guide available on our site at

http://www.pcvu.com/DEMOS/ezcoin/QT/EzC2_QSG.pdf

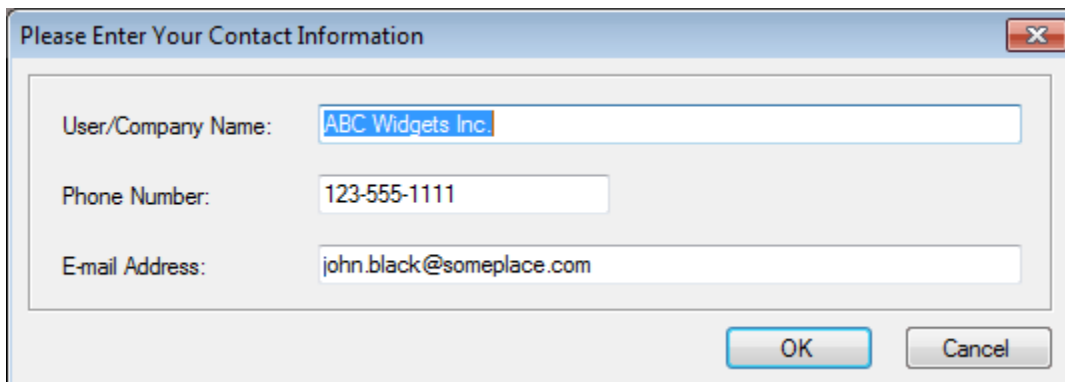
This guide describes the basic functions and features what you will use on a regular basis and gives you an overview of some important features.

We also maintain a FAQ (Frequently Asked Questions) page on our site.

The **Tips of the Day** feature can be accessed anytime from the **Help** menu in EzCoin.

Filling Out Contact Information

It's recommended that you fill out your contact information accurately so that we can better assist with supporting any issues you may encounter when using EzCoin. If you need to update contact information, it can be accessed from the send email screen via the **Change Contact Info** button.



You should enter valid name, phone number and email address when prompted.

EzSetup – Installing or Removing EzCoin

EzCoin is provided on one or more CD, DVD or BD discs. Unless the disc is purely for image files, it will come with an installation program named EzSetup.exe. Trial and downloadable versions of EzCoin will contain this application as part of a self-extracting archive, which can be found in the location you chose to extract the files to.

Trial Versions and EzCoin Activation

EzCoin is provided as a trial (demo) version and a release version. Trial version setup is functionally identical to the release setup. In fact the setup programs are identical. The only difference is in the setup package file which EzSetup references. Once you install a trial version of EzCoin, you can convert it to a release version with an activation code. However, EzSetup should always be used to install the necessary application files, as it can automatically detect what files need to be updated/installed based on the setup package contents.

Cumulative Installations

EzSetup has the ability (which is the default installation setting) to update an existing installation of EzCoin on your system. For example, if you have 2 discs, one for Canada and one for USA, each disc's setup package will contain all the core application files for EzCoin, plus country files for Canada (on the Canada disc) and USA (on the USA disc). Each installation disc will contain all EzCoin core files. Country files are specific to each disc however. When EzSetup installs core files from the disc, it will detect what version of each file is currently installed on your system, and only install or replace any files which are newer.

Country Update vs. New Install

When choosing a country file to install, EzSetup will check if that country is currently installed on your system. If the country data on the installation disc is newer than what is currently provided, EzSetup will place an update file (i.e. Canada.upc) into the Setup folder of your EzCoin installation path. This represents pre-supplied data/pricing information and will be applied to your country file(s) the next time you run EzCoin. If EzSetup detects that your country file is already up to date, no new information will be installed for that country. If the country file doesn't exist, EzSetup will install a new SDF (Country files have an SDF extension) file into the DB folder where EzCoin is installed.

Running EzSetup

To start EzSetup, simply run the EXE directly from the disc (or from the self-extraction location for downloadable installation packages). A multi-step setup wizard will be provided. Simply follow the on-screen instructions and click the **Next** button as needed until you reach the option to click on an **Install** button. Use the Previous button to step backwards in the setup wizard. Click **Cancel** to close EzSetup. When the installation is completed, you will see a final window with two checkbox options, one for placing a shortcut to EzCoin on your Windows Desktop, the other to view the Read Me text file.

Most of the wizard screens are self-explanatory. However, the following screens have information of importance to determine how best to perform the installation.

Existing v2.x EzCoin Installation - Image Copy and Location



If there is no current version of EzCoin (Version 2) installed, the default location will be as above. Use the Browse button to choose a different installation path.

There is a checkbox option named **Install Coin Images with Countries**. Each pre-supplied country file will contain an image file library (with a file extension of .IMG) which contains all of the pre-supplied coin images. This file can be copied to the EzCoin installation path (and will be stored in the Images subfolder) by checking this option. As EzCoin images are represented as JPEG images, the amount of extra storage space is minimal - it's recommended to keep this option checked, as it will improve performance when retrieving image information.



EzSetup will detect any existing installation of EzCoin, as long as it is based on version 2.x, and provide 4 setup choices. *Note: EzCoin version 1.x is not directly supported by version 2. You must export country data from version 1 for use in version 2, and install version 2 separately from the older versions.*

1. **Install and Update as Needed.** This is the default option and the safest, providing a cumulative setup of your existing installation. EzSetup will only install or update new files as needed and leave any existing up-to-date information as is.
2. **Clean EzCoin Installation.** This option will remove all EzCoin core data files, leaving only country files intact. Only choose this option if you are sure you want to perform a “fresh” EzCoin installation, yet preserve any active country data.
3. **Full Installation.** This option will remove every EzCoin file from the installation path, including country files. **Note:** You will NOT be able to recover deleted files from this installation option.
4. **Remove EzCoin.** This option uninstalls EzCoin from your system.

Country File Selection

Each installation disc will have one or more country files available to install. Check country files from the available list to install. If the country is already installed,

EzSetup will detect if the installed version needs any supplied data/pricing updates from the disc. By default, EzSetup preselects every country file available.

Installation to Existing Folders

EzSetup will allow you to install to any existing directory on your system. If EzSetup detects non-EzCoin files in that directory, a warning prompt will be displayed.

EzSetup will not remove existing files or folders, unless they conflict with any file or folder reserved for use exclusively by EzCoin. It's recommended that you install EzCoin to the default installation path provided by the setup wizard. If you wish to install to another location, please make sure that the location contains only EzCoin v2.x files or is empty. EzSetup will not recognize installations of EzCoin prior to or later than version 2.x.

Windows Vista/Windows 7/Windows 8 and User Access Control (UAC)

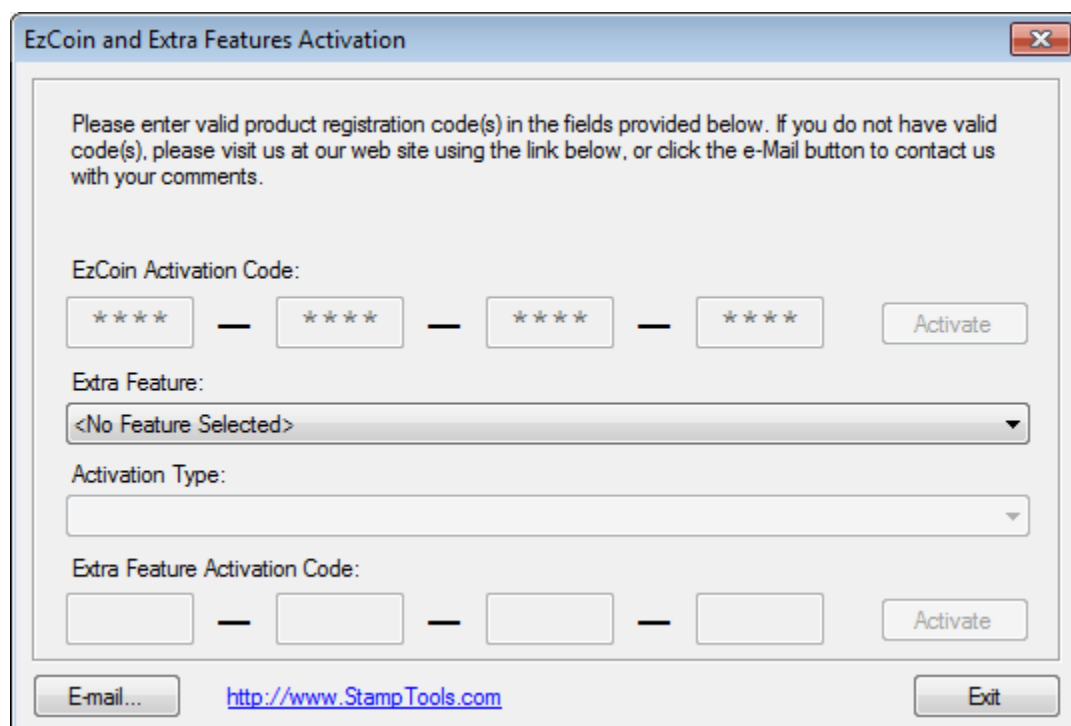
EzSetup and EzCoin are safe applications in the sense that they will not try and perform any privileged actions which would otherwise violate user access control policies on your system. EzSetup deploys shortcuts and files under the ownership of the current user logged into Windows. If you have multiple users logged into your PC who need to use EzCoin, you will need to create shortcuts for each additional user from within EzCoin.

You should not install EzCoin into the Program Files area of Windows when using Windows Vista, Windows 7 or Windows 8. This may cause UAC issues due to restricted access rights defined for that area. EzSetup's default installation path will not point to Program Files. Note that if an existing v2.x EzCoin installation is detected by EzSetup, the default installation path will automatically switch to where EzCoin is installed.

EzCoin Activation

A fresh installation of EzCoin will run under Trial/Demonstration mode. This will be indicated in the title bar of the application as “Unregistered”. You can only open trial versions of country files contained the *DemoDB* folder where EzCoin is installed.

Activation is done using a 16 character activation code. There may be additional activation codes for extra features which SoftPro may provide in future releases of EzCoin. All activation code types are entered using a single window within EzCoin. Choose the **EzCoin Activation** option from the **Help** menu.



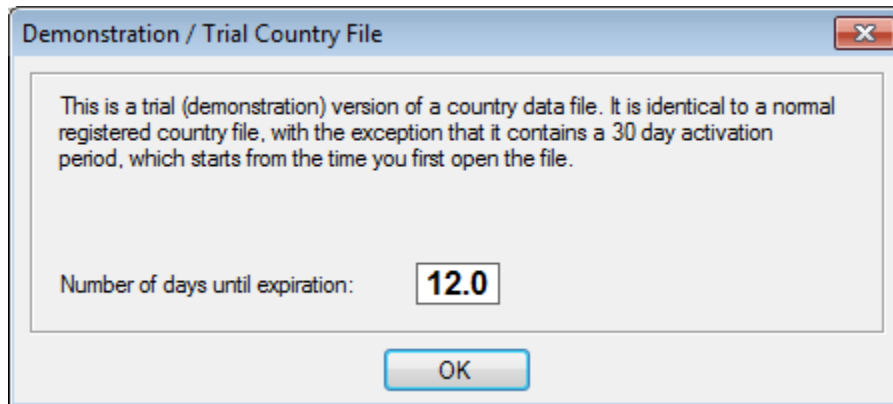
The activation code is entered in 4 parts of 4 characters each, in the top set of input fields. Note that if EzCoin is already registered, the input fields and Activate button will be disabled as shown in the screen example above.

Enter all 16 characters (without dashes) and then click on the **Activate** button to the right of the 4 text box fields. At this point EzCoin will be registered.

Extra features use a dropdown list with a choice of activation types. The activation process is the same for these codes. Just use the second Activate button for the selected feature.

Both a SoftPro web URL link and email button are provided in the activation window.

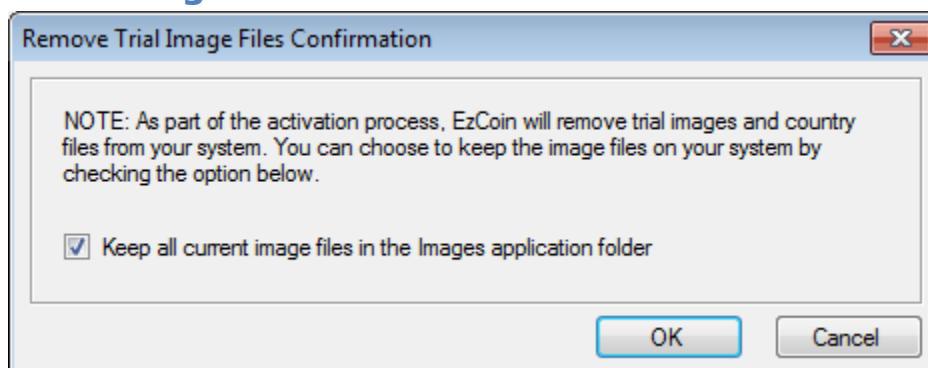
Trial Version Expiration



Demo versions of country files will have a 30 day time limit for which they can be used, after which the usage allowance will expire. You should not use EzCoin demo versions as a fully registered versions of a country for this reason. The 30 day window allows you time to evaluate EzCoin and assess if it's capabilities will meet your needs.

The above dialog window will pop up to warn you on the number of days left. You may extend the usage for a demo country by submitted a request to SoftPro.

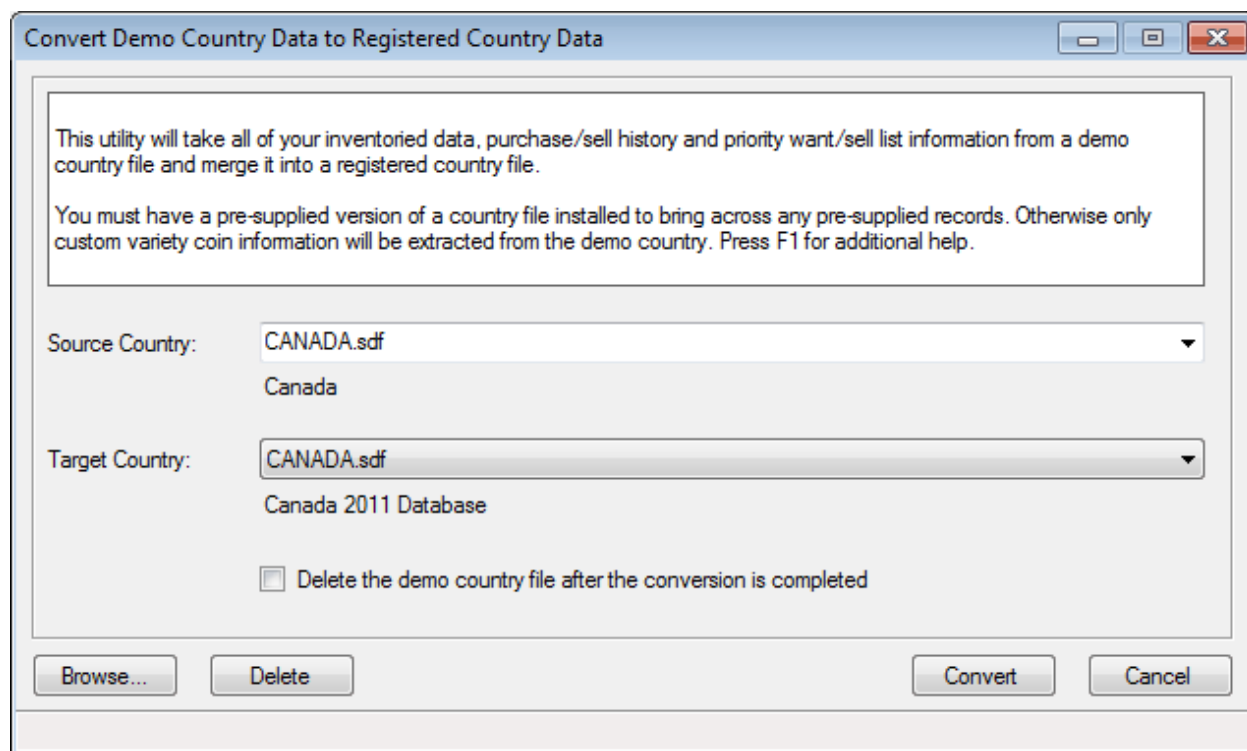
Trial Image Data Removal on Activation



When activating a trial version of EzCoin, you will be presented with the above confirmation dialog for custom image links. If you've linked any custom image files to a trial country file, you can choose to retain those images for the equivalent release version of the same country files.

Converting a Demo/Trial Country to a Release Version

Once you have registered EzCoin with an activation code, you will no longer be able to access the trial versions of country files stored in the **DemoDB** subfolder. If you have any coin information from the demo country which you want to add to the release version of the same country, use the **Convert Demo Country** option from the **County Data File Utilities** submenu.



Source Demo Country

The source country drop down will list all trial country files stored in the **DemoDB** subfolder of EzCoin's installation path.

You can select a country from this folder, or choose to select one from any other location using the **Browse** button. You will not be able to convert a release country using this utility.

Target Release Country

The target country drop down list contains all release country files you have with your version of EzCoin. Unless a target country file exists, you will not be able to perform the conversion.

Conditions for Trial Data Copy

There are some additional restrictions/requirements for the conversion to be aware of.

- The target country must have been initialized, which is done by simply opening the country file in EzCoin at least one time.
- The target file must have the same country of origin. For example, you can't add trial coin information for Canada into a USA target country file - they must both have Canada as the country of origin.
- If the source demo country file contains pre-supplied coin information from SoftPro, then it will only be migrated into the release country if it also contains pre-supplied coin information. If the target country is a custom format with no pre-supplied coin data, then only custom variety coin information can be migrated to the release country. To avoid this restriction, ensure you have purchased a release country from SoftPro and select that country file as the target file.
- Any matching coin records in the target country file have precedence. If you have an inventoried coin in the target country with the same 5 key fields (Denomination, Year, Type/Reign, Variety, Mint Mark) as an inventoried coin in the source demo country, then the coin information will not be added to the release country.
- Priority want lists, sell lists, purchase history and sell history records are merged together, even for the same coin record, as long as the grade information is different. For example, if the grade VG exists in the PWL for a given coin in the target country and a grade EF exists in the PWL for the same coin in the source demo country, the end result will be EF and VG grades in the PWL for the coin record. For purchase/sell history, coin records will not be copied over to the release country for the same coin record if both the grade and purchase/sell date are the same. If the dates are different and the grades the same, the coin record will still be copied to the release country.

Deleting the Demo Country After Conversion

Check the Delete Demo Country option to have the file removed from the **DemoDB** folder after the conversion has completed.

If you don't check this option, you can manually remove the file using the **Delete** button after selecting the country from the source file drop down list.

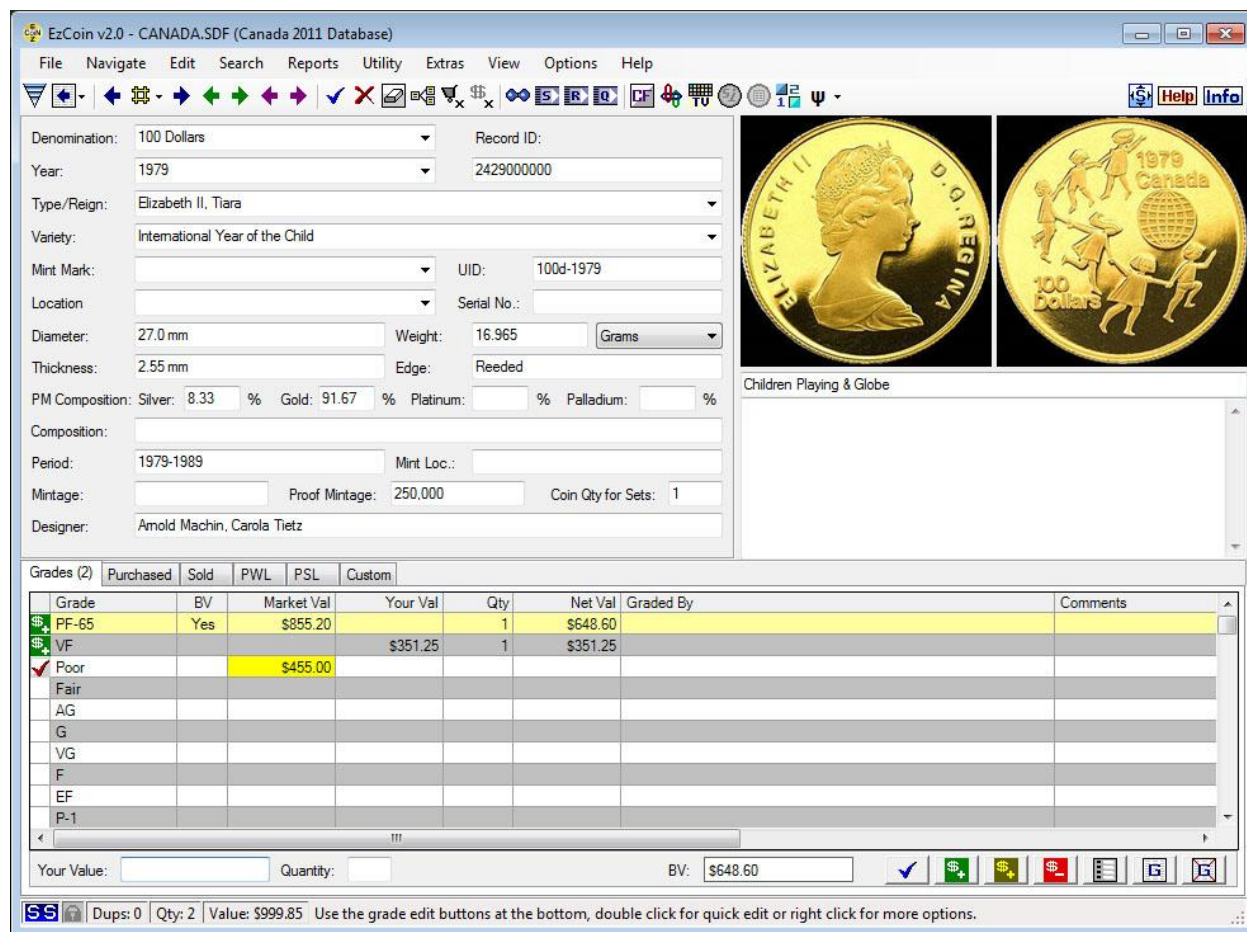
Automatic Backup

The original target release country will be backed up into the **Backup/Temp** subfolder of the EzCoin installation path. There is no restore from backup option available for this type of conversion. You can only restore the file manually by copying it back to the DB folder. If you choose to do this, make sure to run the

Recalculate Country Totals after you open the original file to adjust any currency/quantity values for the grand totals reports.

EzCoin Overview

This section summarizes the various components which make up the main EzCoin window. You can access this help topic from the EzCoin application by clicking on the Help button on the right side of the main toolbar. An example of the main window is shown below.



Menu Bar

The menu bar provides all of the options available within EzCoin. The shortcut keys associated with each menu item can be customized to use any set of shortcuts you need.

File	Navigate	Edit	Search	Reports	Utility	Extras	View	Options	Help
1	2	3	4	5	6	7	8	9	10

1	The File menu contains options for opening and closing country files, performing backups and restorations, and various utilities such as file merging and supplied data updates.
2	The Navigate menu contains options for browsing coin records, including

	Bookmarks, Tags, and Coin Lists to manage groups of records.
3	The Edit menu contains all the basic tools to manipulate the coin record data, including quick mode edit features and rapid multi-entry.
4	The Search menu contains basic search options in EzCoin including eLook™ and Power Search.
5	The Reports menu contains additional searching and report options. The Search and Report menus together provide all of the reporting capabilities within EzCoin. The Grand Totals reports and report profile customizations are also available in this menu.
6	The Utility menu contains various options used to maintain and edit country file information.
7	The Extras menu contains additional features of EzCoin. As new special features are added to EzCoin, they will appear in this menu. Some of these features may require a specific country file to be opened, or require an additional activation code to be purchased.
8	The View menu contains the options to view additional windows of information, such as the Thumbnail viewer or the Coin List. These windows are supplementary to the main EzCoin window and can be dragged and resized around the main window.
9	The Options menu contains items which allow you to customize EzCoin at the application or country file level. The general preferences item contains most of the application customization points in EzCoin.
10	The Help menu contains items to access the context-sensitive help topics, tips of the day, product activation and miscellaneous assistance features within EzCoin.

Tool Bar

The tool bar provides access to the most frequently used features of EzCoin. A shortcut button configuration tool is available which will allow you to assign additional buttons to a secondary window which can be displayed in any position alongside the main EzCoin window.



1	<p>The leftmost icon in this group is the EzCoin Drill Down feature, used to find coin records using a separate window with filtering of the 5 primary key fields (Denomination, Year, Type/Reign, Variety and Mint Mark), using real time preview of the matching records.</p> <p>The second icon in the group allows for quick recall of the most recent 8 coin lookups where more than 1 matching coin record was found. Selecting an item from the popup menu will automatically run the report view and place the selection cursor at the last coin record selected, if applicable.</p>
2	The blue arrows are used to step backwards and forwards through all coin

	records in the country, both pre-supplied records from SoftPro and inventoried records in your collection. Hold down CTRL to step to the first or last record.
3	The # symbol between the blue arrows is used to select the stepping method between the next and previous available coin records.
4	The green arrows are used to step through inventoried records only. Pre-supplied non-inventoried records are skipped. For custom countries without pre-supplied data from SoftPro, the green and blue arrows will perform the same function.
5	The violet arrows are used to step through the contents of the active Navigation List. These lists can be generated from any search or report within EzCoin.
6	The blue checkmark is used to add new coin records or save changes to existing coin records, based on the coin information currently displayed in the main EzCoin window.
7	The red "X" icon will remove the current record from your inventory. If the coin record has pre-supplied information from SoftPro, this will cause the coin record to revert back to a pre-supplied status with the removal of any inventoried information or customizations.
8	The eraser icon will clear the current fields on screen. By default only inventoried or customized data is cleared (priority want/sell list data and pre-supplied fields are not erased). To clear the entire screen of data, hold down CTRL while clicking the icon.
9	Click this icon to duplicate the current coin as a new record. The duplicated coin is based on the 5 primary key fields (Denomination, Year, Type/Reign, Variety and Mint Mark). The bottom status bar will include new information to indicate a duplicate coin status.
A	Click this icon to add the selected grades to the Priority Want List. Hold down CTRL while clicking to use the alternate method of addition. The 2 methods used (based on a general preference setting) will be <i>Quick Add</i> (no pop up dialog) or <i>Normal Addition</i> (dialog with options to select grades, set quantity and type to buy). You don't have to select any grades to add the coin to the PWL – in this case the PWL entry will be indicated as "Any Grade" in reports.
B	Click this icon to add the selected grades to the Priority Sell List. As with the PWL, there are two modes of addition based on whether the CTRL key is held down while clicking on the icon.
C	Click on this icon to provide a quick report of all pre-supplied data for the country (<i>EzBrowse</i>). Hold down CTRL to provide a report of all inventoried records (<i>EzInventory</i>).
D E F	These 3 icons will run the most recent search or report for the following: <ul style="list-style-type: none"> • S: Last option run from the Search menu. • R: Last option run from the Reports menu. • Q: Last QuickStats report. The toolbar icons make it easy to re-run the same report type multiple times.
G	Click this icon to show or hide the custom user fields window.
H	The image links icon is used to access the image links editor, allowing you to

	view or modify the coin images for the obverse and reverse sides.
I	This icon shows the thumbnail image viewer based on the current stepping sort order.
J	This icon will only be enabled when Special Notes and Information is available in the pre-supplied data. When enabled, click the icon to view this information.
K	If there are special pre-supplied notes for a coin record, this icon will be enabled. Click on it to view additional notes about this coin.
L	Click this icon to view the current image in the image comparison window. As you navigate to new coin records, the image comparison window will retain the current image.
M	This icon presents a drop down list of special characters which can be used in place of the shortcut key combinations which normally must be used to insert special symbols.
N	If you have alternate obverse and reverse images associated with a coin record, then this button will become visible. Click the button to show the alternate images, or Ctrl+Click to reset back to the original images.
O	This button allows you to save any modifications to pre-supplied coin information without adding the coin to your inventory. Note that any supplied country updates from SoftPro can change these customizations.
P	Provides a quick help link to the EzCoin main application summary.
Q	This icon will present a dialog window containing summary statistics for the current open country file.

Coin Details

This area of the main application window contains the basic coin details information. The image preview area and the coin details/comments panes share the same horizontal band of the main window. You can drag the vertical separator between these two areas to reallocate space between them.

Coin Key Fields and Attributes

Denomination:	Half Cents	PCGS #:	
Year:	1804	1063	2
Type/Reign:	Draped Bust		
Variety:	Plain 4, Stemless		
Mint Mark:		UID:	hc-1804-1 3
Location		Serial No.:	
Diameter:	23.5 mm	Weight:	5.44 Grams
Thickness:		Edge:	Plain
PM Composition:	Silver: % Gold: % Platinum: % Palladium: %		
Composition:	Copper 4		
Period:	1800-1808	Mint Loc.:	
Mintage:	1,055,312	Proof Mintage:	
		Coin Qty for Sets:	1
Designer:	Robert Scot		

1	<p>A unique coin record for a country is identified by 5 key attributes:</p> <ul style="list-style-type: none"> • Denomination • Year • Type/Reign • Variety • Mint Mark <p>At least one of denomination or year must be present for a coin to be saved. Duplicates of the coin record are allowed, but will still have the same 5 key attributes for each duplicated record.</p> <p>To search for an existing coin record, press ENTER while positioning in any of the 5 key fields. If more than one matching coin is found based on the combination of the 5 fields, a report view will be displayed with all matching records.</p> <p>To perform a Drill Down search, click on the Drill Down button or hold the Ctrl key while pressing ENTER.</p>
2	A country in EzCoin can have up to 4 pre-supplied catalog

	<p>numbering systems, plus an additional 4 user-defined numbering systems. Only one of these numbering types is available on the main screen at any given time. Alternate catalog numbers are optional and are not needed to uniquely identify a coin record.</p> <p>To set the current numbering system, click on the label above the input field to display a popup menu with available choices. Note that each custom numbering system can be labeled as you see fit. Pre-supplied catalog numbering systems can't be renamed.</p> <p>To search on an alternate catalog ID, enter it in the field and press ENTER. There are no partial ID matches allowed.</p>
3	<p>The UID, or Universal Identification Code, is a unique shorthand notation for any pre-supplied coin record. You are free to use any notation for custom UID values, but you will not be allowed to change the pre-supplied versions for any coin record. To perform a UID lookup, enter a complete or partial UID value in the field and press ENTER. If multiple matches are detected on a partial UID field, a report window will be displayed with all matching coin records.</p>
4	<p>This is the primary coin attribute area, divided into pre-supplied coin attributes and those which can only be associated with inventoried records. For a custom country file, all fields are associated with inventoried records.</p> <p>Specific details on these fields is summarized in the next section</p>

Pre-Supplied Coin Attributes

The following fields can be pre-supplied by SoftPro for any country file which is purchased. For custom countries, all fields are custom information. Pre-supplied information is kept as a copy within a country file. You may modify the pre-supplied information, or add to it for any field attribute which is not supplied for a given coin record. Keep in mind, pre-supplied information may be subject to updates with paid supplied country updates each year, in which case your customizations to these fields may be discarded during an update patch.

Diameter	Coin dimension, free format text.
Weight	Coin weights are expressed using one of 5 standards: <ul style="list-style-type: none">• Grams• Troy Ounces• Avoir Ounce

	<ul style="list-style-type: none">• Pennyweight• Grains <p>When entering a weight, make sure to use the correct unit of weight from the dropdown list. Note that when you change a weight unit for an existing weight value, EzCoin will attempt to do a weight conversion of that value, which may result in small rounding errors - ensure that you manually update the weight in this case.</p>
Thickness	Coin dimension, free format text.
Edge	Coin edge type, free format text.
Composition	<p>Compositions are generally expressed in free format text, as percentages of metal types. The composition can also contain special notes about the composition.</p> <p>Precious metal compositions should NEVER be placed in the free format field. Always place the percentage of Silver, Gold, Palladium or Platinum in the appropriate input field.</p> <p>Also note that the weight of the coin and the precious metal composition percentages will determine the bullion value of the coin.</p>
Period	This is the period for which the coin was in active circulation.
Mintage	This is the quantity of coins issued for mint and proof mint types.
Designer	Free format text for the designer of the coin.
Notes	Any special notes or description for this coin will appear underneath the image preview area. These are pre-supplied notes only. Any custom comments you wish to attach to a coin record will be in addition to this.
Coin Quantity for Sets	<p>This is a new attribute in EzCoin Version 2. For coin records which are represented by a physical set of multiple coins, this field will contain the number of coins in the set.</p> <p>On reports, you can display the inventoried grade quantity (i.e. grade MS-65 with quantity 2 plus MS-60 with quantity 3 = Quantity of 5 for the coin record).</p> <p>Or, you can display the set coin quantity. For example, a set with a coin quantity of 6 where you inventory grade MS-63 with quantity 3 will result in a report coin quantity of 18.</p>

Overriding Pre-Supplied Values

If you change a value for a pre-supplied field, you will see the background color of that field change to reflect it is now different from the pre-supplied value. This color coding is a visual cue to inform you of pre-supplied changes. EzCoin provides reporting capabilities to also identify these types of changes.

Inventoried Coin Attributes

The following fields are not provided by SoftPro and are associated with inventoried records only. For users of EzCoin Version 1, you will find that many of the old inventory attributes have moved to the grade level, such as buy and sell information, to allow attributes to be associated with the individual grades and not the coin record itself.

Location	The location field can exist at both the main coin record and also for individual grades. When importing from EzCoin Version 1, you will have the option to import to either or both locations. A utility is also available to migrate locations between the primary and grade level.
Serial Number	The serial number is a general purpose cross reference field.
Comments	<p>Comments can be up to 4,000 characters in length in EzCoin Version 2. In EzCoin Version 1, comments could be up to 16,000 characters in length. Due to how comments are used in advanced searches and reports in version 2, you will not be able to import comments from version 1 which are longer than 4,000 characters.</p> <p>Comments appear below the notes and image area on the right pane of the main EzCoin screen. You may resize the comments area by dragging the space between the image preview and comments area. You can also choose to show the comments in their own separate window to make maximum use of available preview image area.</p>

Tabbed Spreadsheet Data Grids

Depending on the country opened, and on some general preference options to show additional tabs of data, this area will contain spreadsheet-style data grids for the following coin information:








- Available and Inventoried Grades
- Purchase History
- Sell History
- Priority Want List Entries
- Priority Sell List Entries
- Custom Field Entries

Click any tab to show the grid view for the respective information type. The fields which appear in the grid view for the Grades tab can be reordered or removed from the grid altogether using the Field Settings for Grade Data menu option.

The labels for each tab will have a numeric value enclosed in parenthesis to indicate the number of records associated for that data type (i.e. **Custom (3)** indicates 3 custom field values for the coin record).

The grades tab is slightly different from the other grid views in that it contains status icons on the left side of each record.

Each status icon indicates a specific state for the grade, as follows.

	The grade is part of your inventory.
	The grade is in the Priority Want List.
	The grade is in the Priority Sell List.
	The grade is part of your inventory and in the PWL.
	The grade is part of your inventory and in the PSL.
	The grade is in both the PWL and PSL.
	The grade is part of your inventory, in the PWL and also in the PSL.

In addition, a red checkmark ✓ symbol indicates a grade which has a pre-supplied market value from SoftPro, or for when you have assigned a custom market value.

If no status icon is shown, then the data row represents a grade that is available to be inventoried, with no other specific attributes or price information.

Market Values, User Values and Bullion Values

Any grade can be inventoried based on one of 3 values:

- The market value or pre-supplied price is the current value of the coin for the associated grade, in the currency as per the country conversion rate defined.
- The user value is a special one-time override of the market value. You are free to set a user value for any grade for any coin, but be aware that when you choose to do this, market values will no longer be used to calculate the net inventoried value for the coin record for that grade. If a market value doesn't exist, it's recommended that you assign a market value over a custom user value. Unlike EzCoin version 1, you are allowed to assign or change market values for grades.
- The bullion value is only applicable if 2 conditions exist: First, the coin must have at least a percentage of one of the 4 precious metals defined. Second, the coin must have a value weight greater than 0. When these 2 conditions exist, the bullion value will be shown below the grade data grid to the right of the market value.

If the bullion value is greater than the market value, the market value in the data grid for that grade will be shaded with a yellow background color. This means the precious metal content value exceeds the current market value.

You can choose to inventory a grade as it's bullion value and it will be shown in the data grid at the very top row shaded with a gold background color, with the **BV** column containing the word **Yes**.

Selected Grade Information

Below the grade grid are status attributes for the selected grade and a set of shortcut buttons to the right of this information.

Your Value: <input type="text" value="\$1,600.00"/>	Quantity: <input type="text" value="2"/>	Market Value: <input type="text" value="\$1,575.45"/>	BV: <input type="text" value="\$843.76"/>
1	2	3	4

1	<p>This field is present so that you can override and enter a price for any single grade (i.e. on a grade by grade basis). This is NOT your cost, but your override of the supplied market value for any specific grade that you have selected in the Grades window.</p> <p>You MUST first select a grade by highlighting the row and then enter your value and click on the green \$+ icon to accept your entry. This is NOT is a pre-supplied field.</p> <p>It's recommended that you enter a custom Market Value for any grade where a pre-supplied value doesn't exist, and only use the User value to explicitly lock in a price which can't be changed even by a supplied country data update patch.</p>
2	<p>This field is used to enter the quantity of the coins you own for a specific grade that you have selected. The default value is 1, but you may change it to reflect the quantity you own. Please note that you can enter a value of zero (0) and still record this grade as inventoried. This is NOT is a pre-supplied field</p>
3	<p>This is the EzCoin market value for the associated grade. This value may be provided by SoftPro for pre-supplied countries, but not every grade for every coin may have a pre-supplied market value. You may override this value if you choose to.</p> <p>Also note that you can set a Price Lock on any coin so that supplied data updates will never alter these values. (See the price lock icon at the bottom left portion of the Status Bar. This is a pre-supplied field.</p>
4	<p>If the coin contains a valid weight and at least one of the 4 precious metals as a composition percentage, then it's current bullion value is displayed here. This is the value for a single coin, regardless of grade type.</p>

Grade Shortcut Buttons



1	This is the same as the blue checkmark in the main application toolbar, used to add the record to your inventory.
2	<p>Use this button to commit the data you have entered for the selected grade (i.e. qty, your value, dates, comments etc.). This does NOT save the record to the country file yet. It just accepts the entries for that selected grade.</p> <p>You can select multiple grades at one time and add them all collectively with a single click on this button.</p> <p>To actually SAVE the record to file, you must left click on the Save Record Icon (blue checkmark) or Right Click in the Grades Area and select ADD and SAVE from the Pop Up Menu.</p> <p>A general preferences option can be enabled to allow you to auto add grades when you click the blue check icon to save the record. It performs the function of the Blue Check button and the \$+ button in one step.</p> <p>Hold down the Ctrl key while clicking the button to show a dialog allowing for entry of additional grade information, such as buy/sell details, comment and location information.</p>
3	This button will save the selected grade as a bullion valued coin, ignoring the market price. Since bullion value is based on metal content and not grade, the bullion value is the same for any grade you select.
4	<p>Use this button to remove the selected grades from your data (i.e. qty, your value). To CLEAR ALL fields for the Grades, hold down Ctrl while clicking the button.</p> <p>This does NOT remove the record from your inventory, just the selected grades. To remove the entire record/coin from your inventory, you must click on the RED X on the main EzCoin tool bar. You can select multiple grades at a time and remove them at the same time. You may also remove grades by selecting the grades and then RIGHT clicking in the grades area, then choose the Remove Selected option from the popup Menu.</p>
5	Use this button to bring up the quick edit grade edit window. In this window you can edit any of the dates, prices and comments for a single grade at a time. Compare this to the Grades quick Editor icon which allows for editing multiple grades and the associated details all at the same time.
6	<p>Use this button to allow editing of multiple grades in a spreadsheet-type editor. You can make changes to the data for any of the grades listed.</p> <p>Any changes you make can be undone within the current editing session. Once the window closes, changes cannot be undone.</p>

	This provides a quick way to make multiple changes to multiple grades in one convenient window. An option available in the Preferences Menu allows you to auto-save the coin record. In this mode, once you save the data in the Quick Edit window (click on the Apply Changes Icon), the grade information is automatically saved to file.
7	If you have selected a grade or multiple grades, you can click on the Grades Deselect Icon to deselect the grade. This does NOT clear any data, but just deselects the grades in the grid.

Purchase/Sell History Shortcut Buttons



1	Add a new transaction to the purchase/sell history.
2	Remove selected records from the purchase/sell history.
3	Edit the selected record in the purchase/sell history.
4	Perform a quick edit on the purchase/sell history using a spreadsheet view.
5	Edit/review the complete purchase/sell history for the country.

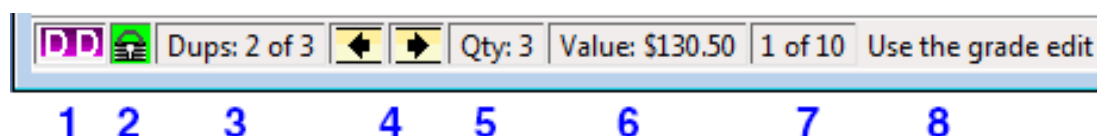
Priority Want/Sell List Shortcut Buttons



1	Add a new record to the priority want/sell list.
2	Remove selected records from the priority want/sell list.
3	Edit the selected record in the priority want/sell list.
4	Perform a quick edit on the priority want/sell list using a spreadsheet view.
5	Edit/review the complete priority want/sell list for the country.

Status Bar







The bottom of the main EzCoin window contains a status bar with several elements. Not all of these elements will be visible, depending on the current open country file opened, the state of the current coin record, or any special background tasks currently running.



1	This is the current record status. See below for a list of all status types.
2	If you enforce pricing locks on a coin record, this icon will be enabled. Price locks prevent EzCoin from applying price changes when new pre-supplied country updates are applied.
3	If duplicate coin records are created on the same coin record, this status area will indicate the current and total number of duplicate records.
4	Use these arrows to navigate between the duplicate records. Note that by default the green arrows will navigate the duplicate records as well. These supplementary arrows are useful when you disable duplicate record stepping on the green arrows.
5	The total quantity of coin grades inventoried on this record.
6	The total value of the inventoried grades.
7	If a navigation list is active, this status indicates the current and total number of records in the list.
8	The remaining area is used for hint messages on menu options and progress messages for operations which take several seconds or more to complete.

Coin Record Status Indicator

The bottom left icon in the main EzCoin window contains a status icon for the current coin record.

	There is no country file opened, or no current coin record shown in the main window.
	EzCoin is busy performing a background task and can't be interrupted.
	The record is pre-supplied data and has not been added to your inventory.
	The record is part of your inventory and is based on pre-supplied data.
	The record is part of your inventory and is a custom variety, or you are working with a custom country file. For a custom country file, you will never see the blue or green status icons, only this one or the duplicate status icon for inventoried records.
	The record is one among a set of duplicate coin records based on the primary 5 coin attribute fields.

Context Sensitive Popup Menus

The following areas on the main window have special popup menus by right or left clicking within the area or on a specific label.

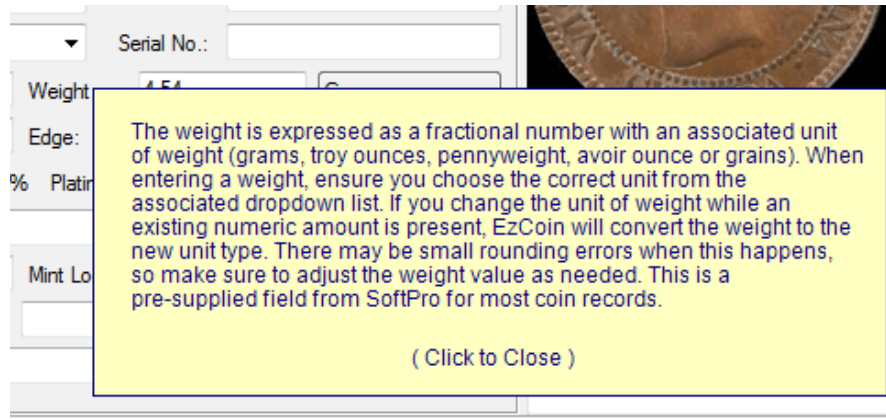
- Right click within the data grids in the bottom tabbed area to show a popup menu with specific options related to the grid type (i.e. right clicking within Grades will give you grade-specific options).
- Left click the Alternate Catalog ID label above the input field customization options.

Context Sensitive Quick Help

Most of the buttons in the main EzCoin window and labels which are associated with input fields have context sensitive quick help.

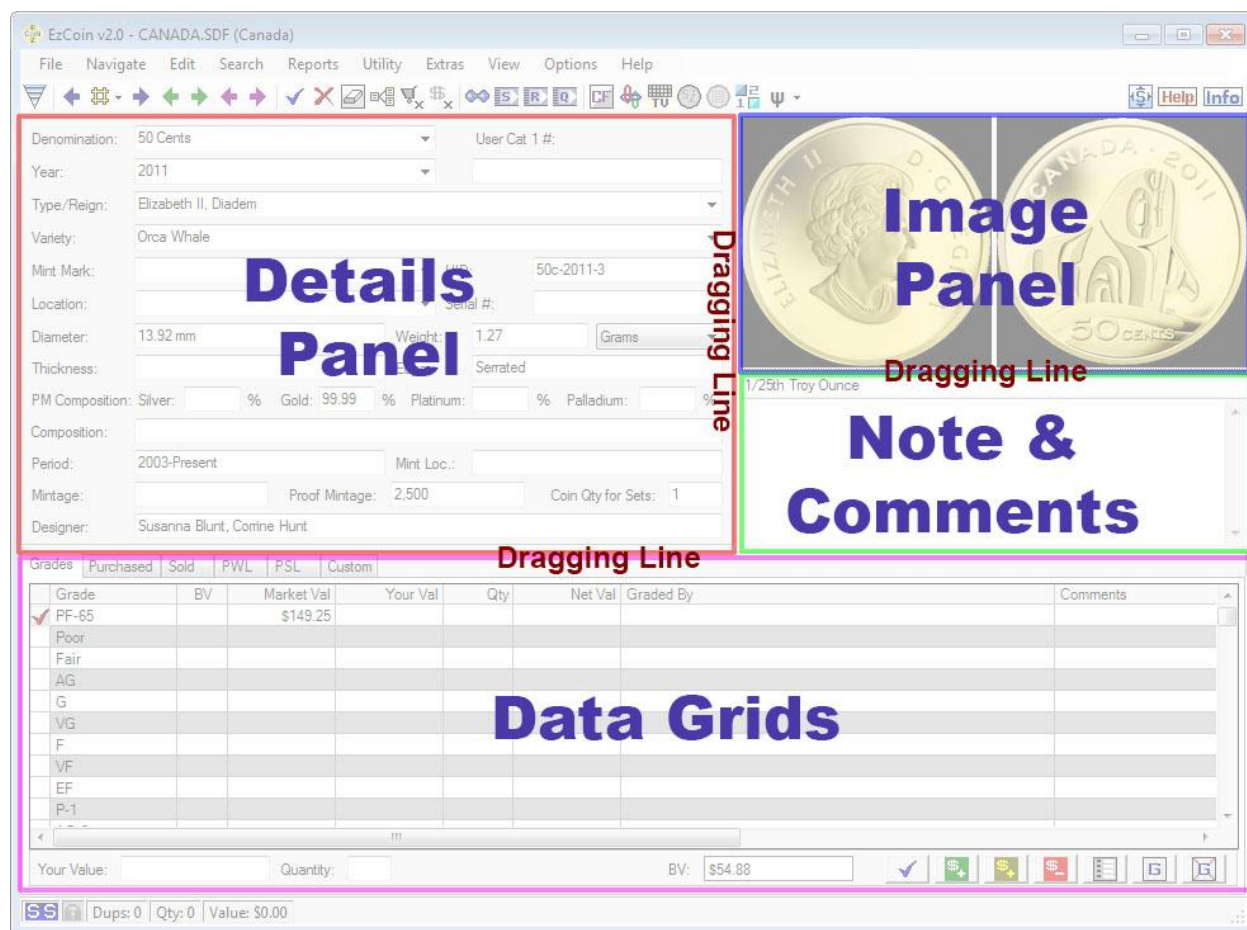
Simply right click on a label or button and a small window will appear with a short description of what that button or label means.

For example, right clicking on the **Weight** label will show the following popup help topic:



Resizing Panels in the Main Window

If you have a large high resolution display, you can increase the size of or resize the primary areas in main EzCoin window. The main details panel in the upper left area has a minimum height which can't be made smaller, to avoid hiding key coin fields. Aside from that, the main window has the following configuration:



There are 3 invisible lines separating the 4 sizeable areas in EzCoin. To make the details panel larger (which makes the image & notes/comments areas smaller), click in the area between the panels and drag to the right while holding the mouse down. Similarly, you can click and drag between the image panel and the notes/comments panel to allocate a different size ratio between those two areas.

The data grids area can be made smaller or larger vertically by click-dragging in the area between the top 3 panels and the data grids.

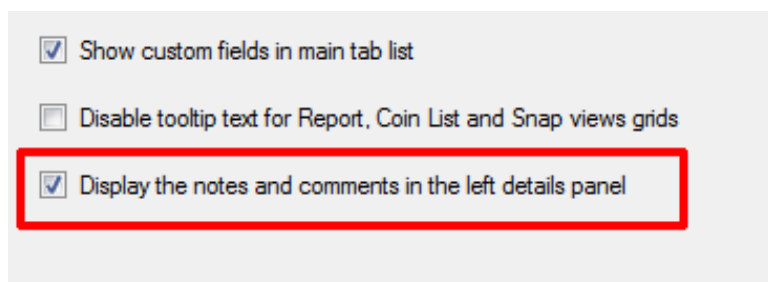
Note that with a large display area, there can be a lot of unused space between the details panel and the data grid on the left. If this is the case, then use the preferences option to move the notes and comments to the details panel, as described in the next section.

Alternate Display Mode for High Resolution Monitors

EzCoin was designed with a default main window size to accommodate a minimum screen size of 1024 by 768 pixels. With the common format of wide screen 1080P (1920 x 1080) or higher resolutions in today's computer displays, EzCoin provides a

generate preference option to take advantage of this, by moving the coin notes and comments fields from underneath the image area to the left details pane, appearing underneath the Designer field. This provides more useable space for larger coin images.

To enable this mode, go to the EzCoin coin **General Preferences** dialog and choose the **Display** tab. Check the option as shown below:

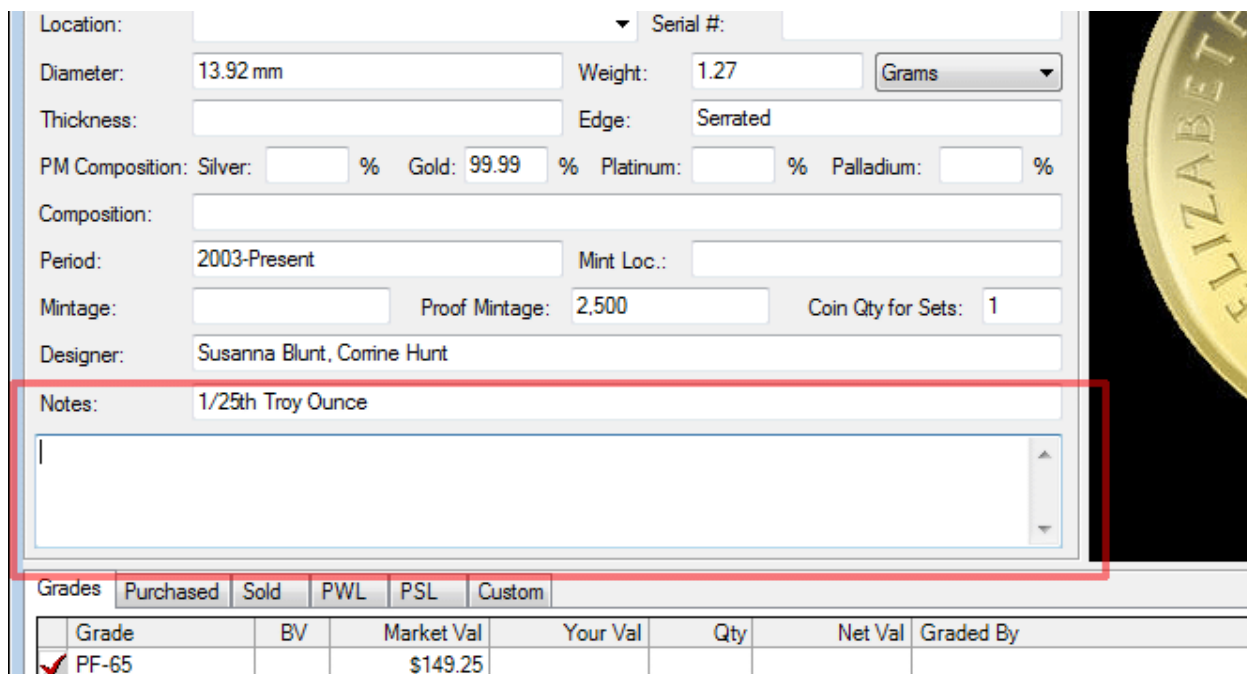


☒ Show custom fields in main tab list

☐ Disable tooltip text for Report, Coin List and Snap views grids

☒ Display the notes and comments in the left details panel

This will now place the notes and comments fields on the left details panel at the bottom.



Location: Serial #:

Diameter: Weight:

Thickness: Edge:

PM Composition: Silver: % Gold: % Platinum: % Palladium: %

Composition:

Period: Mint Loc.:

Mintage: Proof Mintage: Coin Qty for Sets:

Designer:

Notes:

Grades	Purchased	Sold	PWL	PSL	Custom	
Grade	BV	Market Val	Your Val	Qty	Net Val	Graded By
✓ PF-65		\$149.25				

Data Grid Fields

The following tables summarize the fields which can appear in each data grid. Note that the PWL/PSL data grids are turned off by default. You can enable them using the EzCoin general preferences. The custom field tab will not appear unless you have assigned custom fields to the country file.

Grade Grid Fields

Field	Description
Grade Name	The name of this grade, i.e. MS-65. Grades can be pre-supplied from SoftPro or custom ones which you create. The grade list is based on the country file, and can be filtered to only show grades you may be interested in.
Bullion Value	If a coin was inventoried as a bullion value based on precious metal content and a valid weight, this field will be shown in the "BV" field with the value "Yes". In addition, the row in the grid will be shaded with a yellow background color.
Market Value	The price of the grade, either a pre-supplied value or one which you assigned, expressed in the current currency format and conversion rate assigned to the country. If the bullion value of a coin exceeds the market value, this field will be shaded in yellow to indicate this condition.
User Value	You can choose to override any market value for any grade. By default no user value will be applied to any inventoried grade.
Quantity	Quantity can be a value from 0 and up to a maximum of 99,999,999. A grade can be inventoried with zero quantity.
Net Value	This is quantity * the user value/bullion value/market value.
Coin Qty	The total coins associated with a single grade. This value is the grade quantity multiplied by the Coin Set Quantity (which normally is 1 coin for non-set records) to result in the total number of physical coins.
Comments	You may enter any text comments to associate with a grade. Unlike version 1 of EzCoin, comments can be associated with both the coin and the individual grades.
Location	You may enter an optional location to associate with a grade. Unlike version 1 of EzCoin, location information can be defined at the coin level and grade level.
Graded By	You may enter an optional value for who graded the coin. Version 2 of EzCoin assigns this information on a per grade basis.

Purchase History Grid Fields

Field	Description
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Field	Description
Grade Name	The name of the grade purchased. Since purchase history is transactional, the grade may appear more than one time in the data grid. Note that EzCoin allows you to specify "Any Grade" as a reference if you are unsure of the actual grade.
Quantity	Quantity of coins purchased can be a value from 0 and up to a maximum of 99,999,999.
Purchase Date	When the coin was purchased. This value can be empty, but it's recommended you assign a date so that a chronological transaction report can be generated properly.
Purchase Price	The amount paid for the coin(s). You should enter the total purchase price, as EzCoin doesn't allow you to set itemized prices for a transaction (i.e. if you purchase 3 coins on the same transaction and wish to itemize 3 different prices, then you will need to enter this information as 3 transactions).
Purchased From	Who the coin(s) were purchased from.
Comments	You may enter any text comments to associate with the transaction.

Sell History Grid Fields

Field	Description
Grade Name	The name of the grade sold.
Quantity	Quantity of coins purchased can be a value from 0 and up to a maximum of 99,999,999.
Sell Date	When the coin was sold. This value can be empty.
Sell Price	The amount of the sale.
Sold To	Who the coin(s) were sold to.
Comments	You may enter any text comments to associate with the transaction.

Priority Want List Grid Fields

Field	Description
Grade Name	The name of the grade you want. This can be set as "Any Grade" if you are just interested in adding the coin itself to the priority want list.

Field	Description
Buy Quantity	The quantity of coins you wish to buy.
Type to Buy	A general category or comment to associate with the record.
Market Value	This value is not something which can be changed in the grid. EzCoin simply carries over the grade's market value to the PWL grid for reference.
Net Value	A calculated value which represents the potential cost of buying coin(s) based on the current market value.

Priority Sell List Grid Fields

Field	Description
Grade Name	The name of the grade to sell.
Sell Quantity	The quantity of coins you wish to sell.
Type to Sell	A general category or comment to associate with the record.
Market Value	Market value for the grade.
Net Value	A calculated value which represents the potential sale value.

Custom Fields Data Grid

Custom fields only have 2 columns: The field name and it's corresponding value. Each custom field with a value for the coin will be represented as a single row in the grid. You can choose to show the custom field list in a separate window for easier access (from the EzCoin **View** menu).

Coin Information Relationships

EzCoin doesn't automatically maintain the relationships between the following 5 sources of grade information:

- Inventoried grades
- Purchase History
- Sell History
- Priority Want List
- Priority Sell List

For example: If you wanted to purchase a grade of MS-65 for a coin, you would add it to the Priority Want List.

If you then purchased this coin for the same grade, you would add it to the purchase history, your inventory, and then remove it from the PWL.

If you then decided you no longer wanted this coin, you would add it to the Priority Sell List.

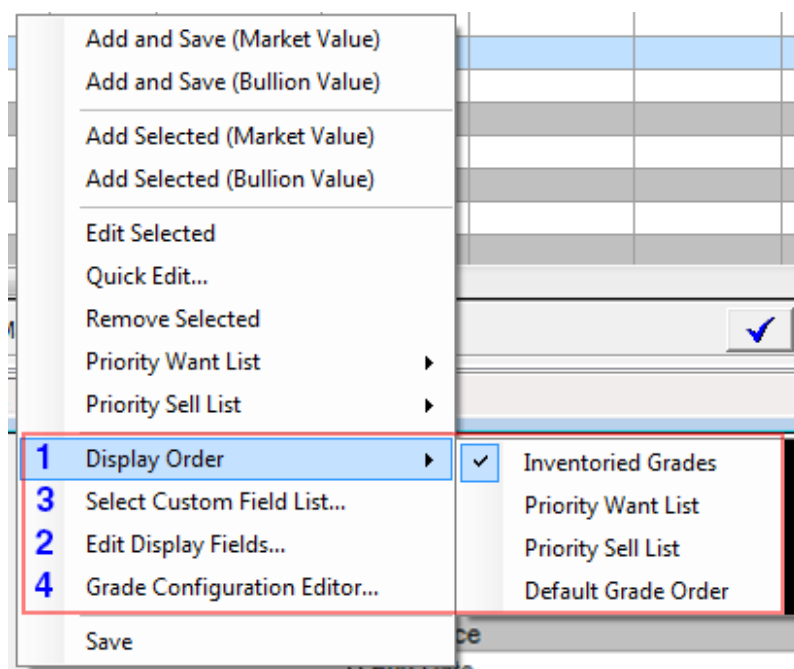
Once you sold the coin, you would remove it from your inventory and the PSL, and add it to the sell history.

You would need to manage this sequence of activities manually - EzCoin isn't an inventory management system.

Customizing the Grades Data Grid Field List

Inventoried grades can contain many fields of information, creating a wide grid which can require a lot of left and right scrolling to see every column of data. In addition, country files can be assigned several dozen grade classifications which you may not require for a given country. For these reasons, EzCoin provides several customizations on how to display the grade data.

You can access these options either from the **Utility** or **Options** items in the main menu, or by right clicking in the grades data grid to see the following popup menu:



1	The display order determines which grades appear before others in the data grid.
2	The choice of which grade fields to show across the data grid can be chosen with this option.

3	The editor used for item 2 above has a custom file export option. This will generate template files which can be switched out by choosing this menu option, allowing for quick swaps on the fields in the data grid.
4	The master grade configuration editor defines what grades are visible in the data grid and on reports.

Setting the Grade Display Order









The default display order (Inventoried Grades) is based on the following priority:

- A grade which is assigned to your inventory as a bullion value.
- A grade which is assigned to your inventory based on market value.
- Grades assigned to the priority want or priority sell list.
- Any grade which has a market value or user value (indicated by the red checkmark icon).
- Any remaining grades, sorted by the master grade configuration for the country.

Choosing the priority want or sell list order will bump PWL/PSL grades to the top of the grid.

Choosing Default Grade Order will place the grid in the grade order set for the country. This last option may be useful for editing grade data as a whole using the quick editor feature.

If none of the 4 items in the menu appear with a checkbox to the left of the item name, then the grade order is based on a specific column you chose to sort on. Sorting by column (in ascending or descending order) is achieved by simply clicking on the header label.

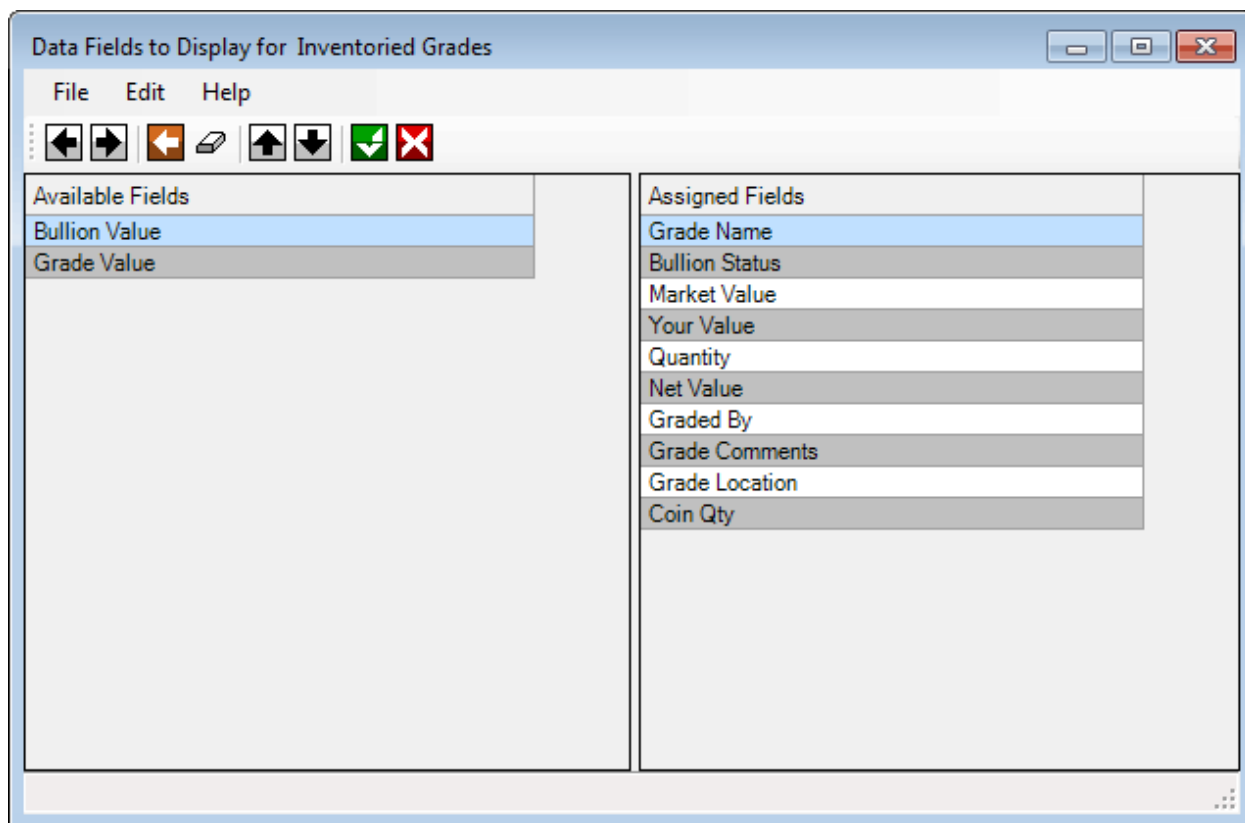
	Grade	BV	Market Val	Your Val	Qty	Net Val	B
	AU-50		\$1,575.45	\$1,600.00	2	\$3,200.00	
	MS-60		\$2,092.75		1	\$2,092.75	
	VF-20	Yes	\$637.80		1	\$843.76	
	MS-63		\$4,177.20				
	G-4		\$233.35				
	VG-8		\$371.15				
	F-12		\$478.85				
	EF-40		\$1,044.65				

In the example above, the Net Value is sorted in descending order. A column sort order is indicated by the reversed coloring on the column's label.

To clear the column sort order, hold down **Ctrl** while clicking the column label.

Editing the Fields to Display

If you want to add or remove fields from the data grid (this only shows/hides fields, it doesn't remove the data from the country file), choose the Edit Display Fields menu option to show the following editor.



The left side of the editor shows fields available to assign to the data grid. The right side shows currently assigned grade fields.



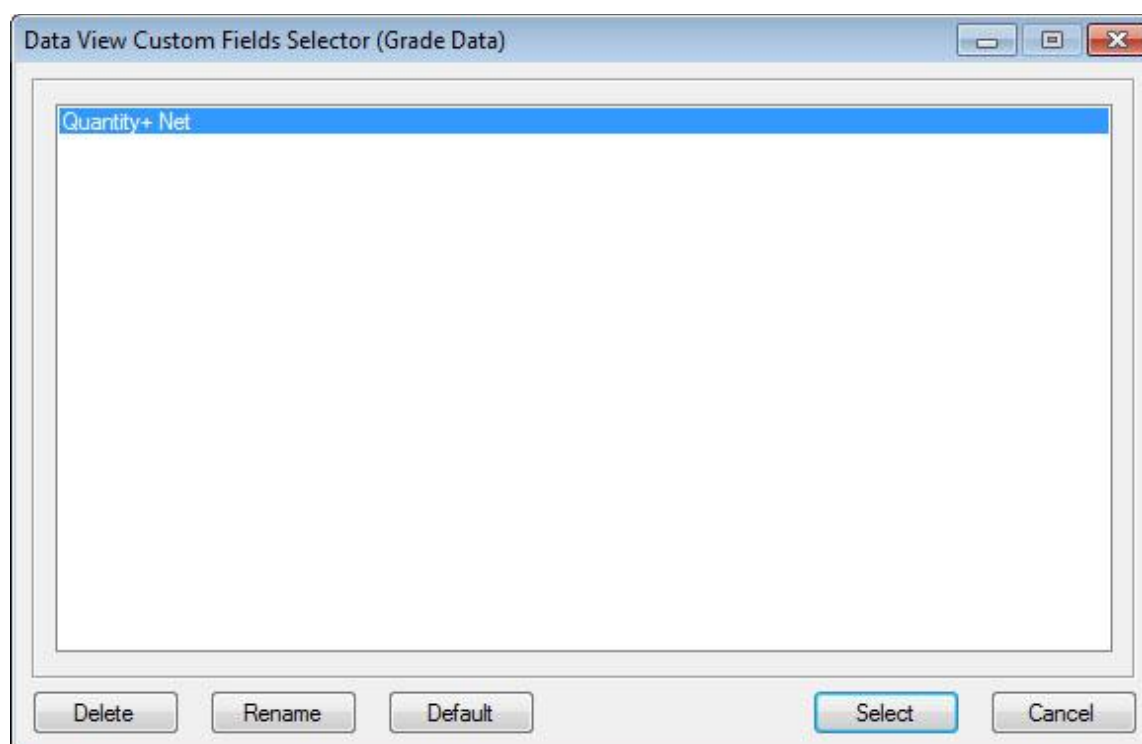
1	To remove fields from the right side, select them and click on the left arrow, or right click in the grid.
2	To add fields from the left side to the right, select them and use the right arrow button, or right click on the left-side list. You can assign fields one at a time by double clicking the field in the list.
3	Click on Undo to reset the field assignments to the previous saved copy.
4	Click on the eraser button to clear all assigned fields.
5	To reorder the fields, select the ones you want to move in the assigned list, and use the up and down arrow buttons. Hold down the Ctrl key to move the selected items to the start or end of the list.

6	Click on the save button to assign the field list to the grade grid in the main EzCoin window.
7	Click on cancel to discard any changes.

Custom Field Assignment Templates

The assigned list of fields can be exported to a custom fields file, using the **Save Custom File** menu option. Simply enter a description for this file and it will be saved to the **User** subfolder of EzCoin with an extension of .FGRD.

To assign a custom field list for the grades data grid, right click anywhere in the grid area and choose **Select Custom Field List** the from the popup menu.



Use the **Default** button to reset the grade fields in the data grid to the default list which was in effect before assigning any custom field file.

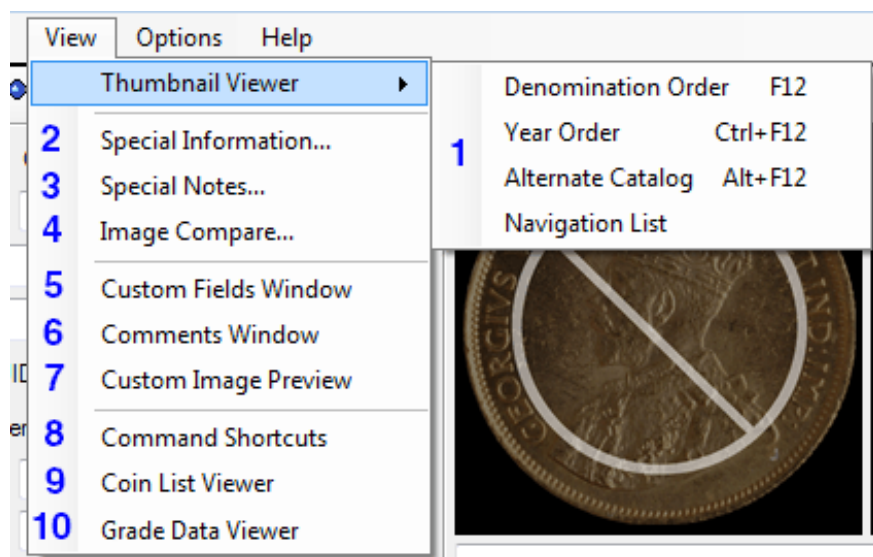
Use the **Delete** button to remove custom field files.

Use the **Rename** button to change the name of the field file.

Click on **Select** or double click an entry in the list to use the custom field list.

Support Windows

You can display additional secondary windows which support information contained in the main EzCoin window. These secondary windows are displayed (or hidden) by selecting options from the **View** menu. Some of these items are popup dialog windows, which must be closed before the main window can be accessed. Other window types can be sized and positioned around the main window, and will remain on your screen until you close or hide them. When the latter types of windows are visible, a small checkmark icon will appear to the left of the menu item name.

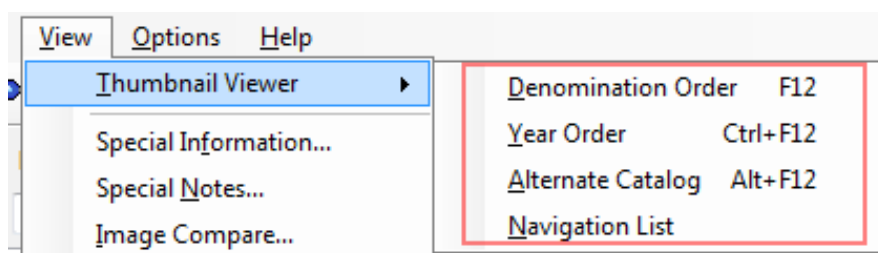


1	The thumbnail viewer provides a grid of images which can be resized and configured to contain up to 14 rows and 14 columns of coin images on screen at one time. There are 4 methods for displaying the images.
2	The special information window is only available for specific coins and specific country files – it's not available for custom countries or custom coin varieties.
3	Special notes is pre-supplied additional information for specific coin records by country. Both special notes and special information are only available when the 2 corresponding buttons in the main EzCoin toolbar are displayed in an enabled state.
4	The image comparison window displays coin images in a separate window from the main EzCoin image area, allowing you to compare two similar coins on screen at the same time.
5	Custom fields are extensions you can make to any country file, to save additional data for coin records.
6	EzCoin provides a small area below the coin image area for comments. You can hide this area and opt for a sizeable window for holding the coin comments.
7	Custom fields can include image link field types. You can display these secondary images in a separate window, which is what this item is for.

8	If you would like to extend the toolbar button commands to a secondary window, this would be the one to use. Many of the options in the main EzCoin menu can be attached to a shortcut button window for convenient access.
9	The Coin List viewer is a small data grid viewer for coin records. You can use this viewer as a mini-browser from coin records obtained from bookmarks, tag lists, searches and reports.
10	The data grids at the bottom of the EzCoin window can contain many fields of information, which can result in frequent horizontal scrolling to see the fields of interest to you. You can display the vertical view window to show one record of data from selected rows in the data grids in a top-down manner, allowing you to see most, if not all of the field data at one time.

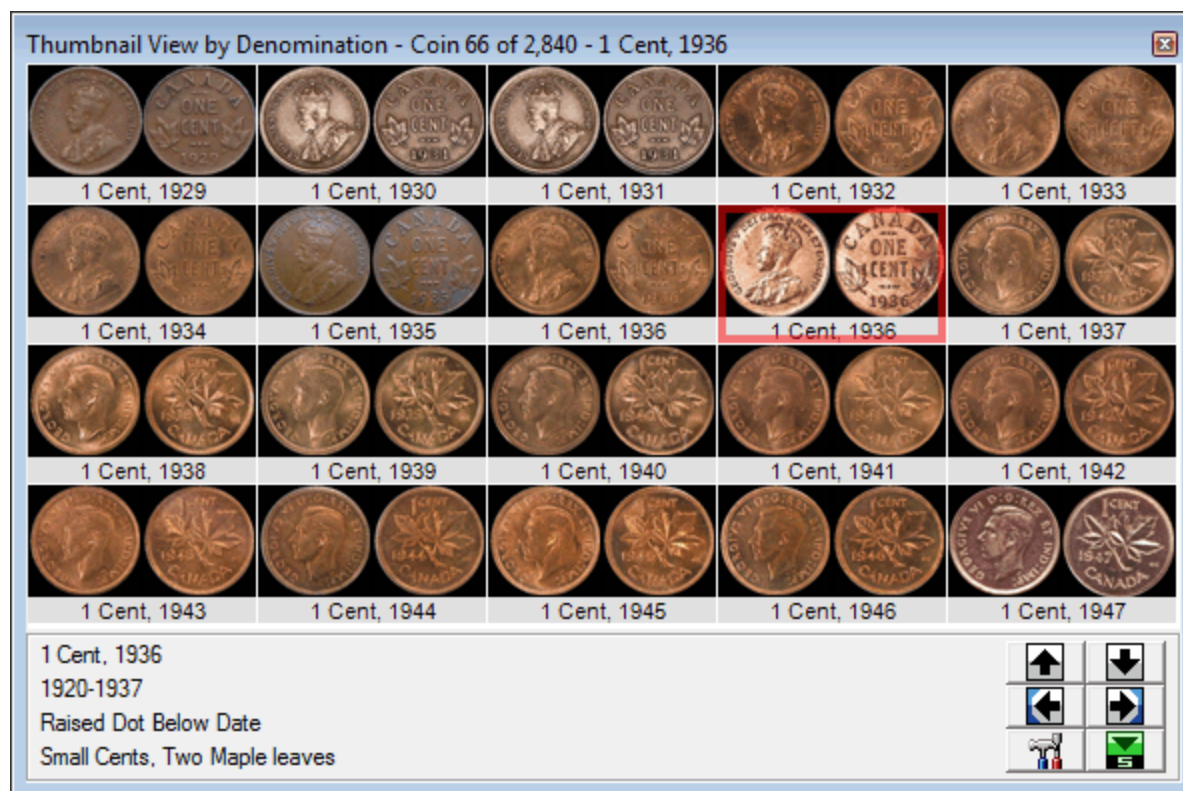
Thumbnail Viewer

The thumbnail viewer provides a convenient grid of coin images. The grid is displayed using one of 4 display methods, accessible from the **View** menu.



- **Denomination Order:** The default display method will show images ordered by denomination, then by year, starting with the current coin record shown on the main screen.
- **Year Order:** The sort order will be by year, then denomination.
- **Alternate Catalog ID:** Only coin records which are inventoried based on the current catalog ID selected in the main EzCoin window will be displayed. There can be up to 8 (4 user and 4 pre-supplied) alternate numbering systems in EzCoin for which you can associate with coin records. Note that coins which don't have a catalog ID value assigned will be skipped over.
- **Navigation List:** You build navigation lists generally from searches and reports. You can show all the coin images which are part of the active list.

An example of the viewer window is shown below:



The number of rows and columns can be configured from the EzCoin general preferences. Up to 14 columns and 14 rows can be used. The window itself can be resized. Once you release the mouse button when dragging the window to a new size, all of the coin images will be adjusted to fill the new dimensions, while maintaining the proper image proportions.

The bottom of the window shows basic summary information for the selected coin. If you move the mouse over any coin in the grid, the information will change accordingly. You can "lock" a coin record and display it in the main EzCoin window by simply clicking an image. A selection rectangle will appear around the image you clicked on.

If you wish to lock an image in the viewer but NOT change the coin record in the main window, right-click the image.

To close the viewer and select a coin for the main window at the same time, either double-click an image, or select the image, then click on the show ("S") button at the bottom right of the viewer window.

To navigate pages of images, use the up and down arrow icons, or press the cursor up or down arrows on the keyboard (**Note:** keyboard shortcuts for thumb viewer navigation only work when the viewer is the active window in EzCoin).

To move the selection rectangle along the current page of images, use the left and right arrow keys on the keyboard.

To move to the first or last page of images, use the left and right arrow icons, or press the Home or End keys on the keyboard.

Clicking the preferences button will display the preferences tab for thumbnail viewer customizations.

Missing Images

The viewer will show the primary coin images only. When images are not available for a given coin number, the position in the grid will be shown as a blank square.

Image Display Speed

EzCoin will build each page of images one coin at a time. As the image page is building, you can do other things in EzCoin, or even close the viewer while the images are being painted.

The time to display a page of images depends on a few things:

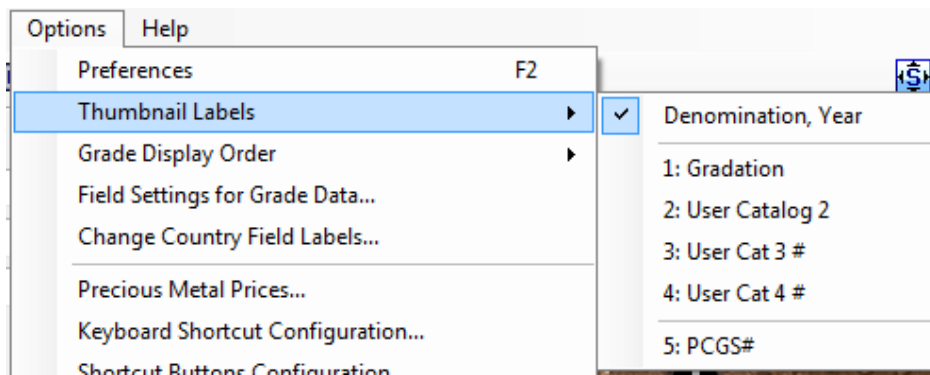
- If the images are being accessed from CD/DVD disc (images copied to your local disk drive will display significantly faster).
- The image display quality (a low quality setting will result in faster rendering).
- The performance level of your system.

Single Row Mode

You can right click any area in the information pane at the bottom of the thumb viewer window to collapse the viewer into a single row of coin records. To restore the original number of rows, simply right click on the information pane a second time.

Alternate Labels

The default text which appears below each image pair is the Denomination and Year. You can choose to show alternate information by choosing the label method from the **Options** menu.



Note that the label text is based on current settings for the country file. Pre-supplied catalog ID values may also be assigned to the thumbnail viewer if pre-supplied by SoftPro. The example above shows PCGS for USA.

Image Comparison

This option displays coin images in a secondary window which can be sized and positioned independent of the main EzCoin window. An example of this window is shown below.



The comparison window has a few toolbar options available.

The number buttons display the primary or alternate image set for the coin record. The title bar of the compare window will show which of these images is active. The Denomination and Year are also shown in the title bar, with the type and variety in the information bar below the images.

The image compare represents the coin record which the image is associated with, not necessarily the one currently visible in the main EzCoin window.

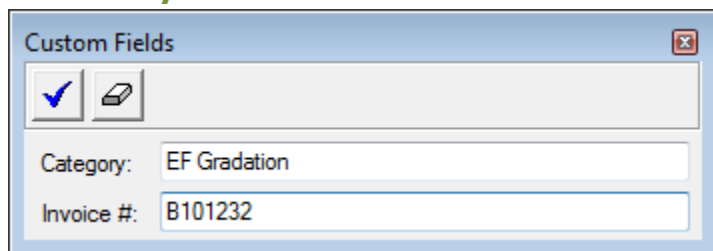
The swap button (black/white arrows) will exchange the coin record in the image compare with the one in the main screen.

The orientation button (black and white boxes button) will swap the coins between a horizontal and vertical orientation, and will also swap the window width and height at the same time. This orientation will be saved to your EzCoin general preferences after the application is closed.

Custom Fields

You can choose to show custom fields as a secondary window which can be resized and dragged alongside the main window, and/or place the fields as a data grid tab in the main window using a general preferences option. An example screen of each type is shown below. For details on defining custom fields, refer to the editor in the **Utilities** help section.

Secondary Custom Fields Window



You can resize this window as small or as large as needed. If the window is smaller than the number of fields, scroll bars will automatically appear.

To show the secondary window, use the **Custom Fields Window** option under the **View** menu.

Main Window Data Grid Tab

Grades	PWL	PSL	Custom (2)	
	Field Name		Field Value	
1	Category		EF Gradation	
2	Invoice #		B101332	

To enable the Custom fields tab in the main window use the Preferences option (under the **Display** tab) to enable it.

Custom Field Image Preview

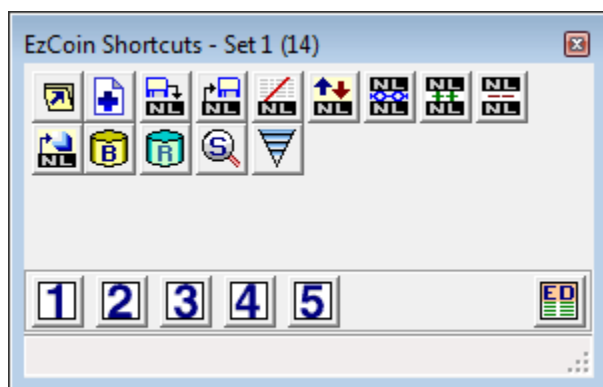
If you have defined a custom field as an image link data type, you can see a preview of the image by CTRL + Clicking the ellipsis (...) button to the right of the image link field in the custom fields window (normal single clicking provides a browser window to locate an image file).

If you are using the custom fields data grid view in the main EzCoin window, you can show the image by simply selecting the image field in the grid. If the custom image preview window isn't displayed, you can enable this from the **View** menu or by right clicking in the data grid and choosing the show option from the popup menu.

Custom images retain their current image until you decide to preview another image, even if you change to another coin or close the country file.

Command Shortcuts

If you have created custom shortcuts for the EzCoin main menu commands, you can show this customized button window by choosing the **Command Shortcuts** option from the **View** menu.



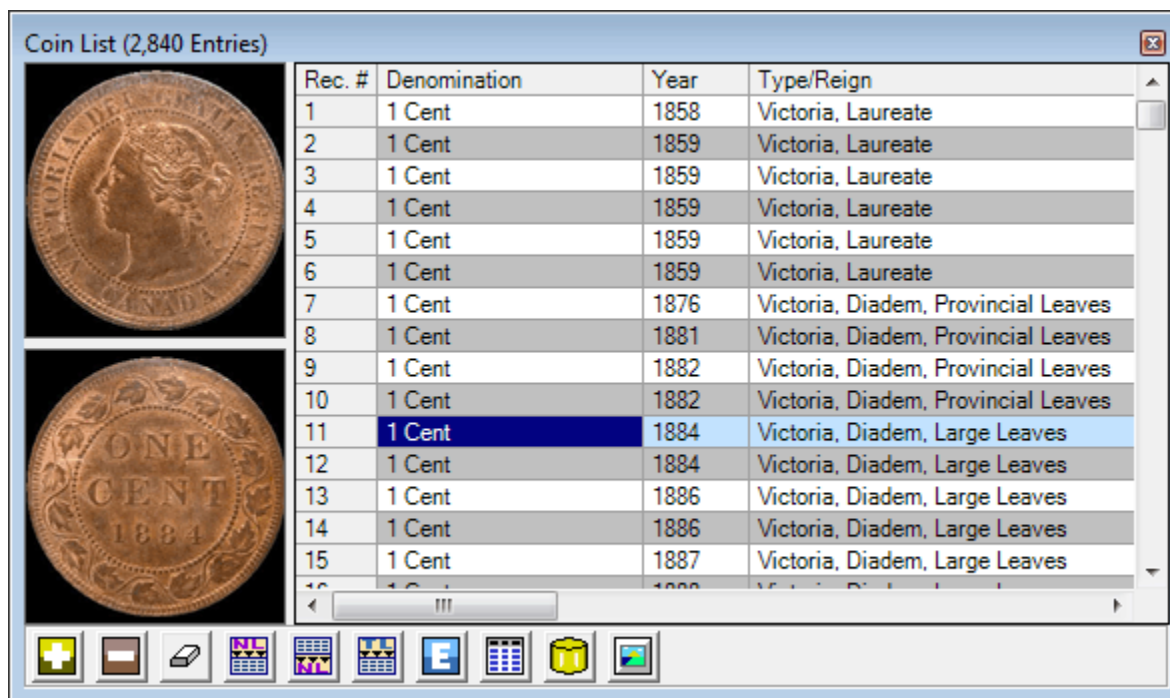
This window can be positioned or resized as needed. There is a minimum allowable size for this window; however there is no restriction on how large or how many buttons you want to put on it. As you resize the window, the buttons will automatically rearrange themselves to fit the window width.

If you hover the mouse cursor over a button, its help hint message will appear in the status bar at the bottom. The title bar shows the current button set you are using, and the total number of buttons active in this set.

To change to a different button set, click one of the numbered buttons at the bottom. You can use up to 5 different sets of shortcuts. If you want to swap to additional shortcut button configurations, or edit the current button sets, click on the shortcut buttons at the bottom right. Refer to the shortcut button editor help for more details on customizing the buttons for this window.

Coin List Viewer

The coin list viewer is a special window which can co-exist with the main EzCoin window. You can drag this window to any position on your screen and resize it as needed to fit within your workspace. When you run EzCoin for the first time, the window is hidden from view. Use **the Coin List Viewer** option from the **View** menu to show or hide this window. A typical coin list would appear similar to the following example.



The coin list window has 3 basic components: An optional image preview pane, a data grid to show some basic fields of data (this can be customized), and a toolbar with a handful of options.

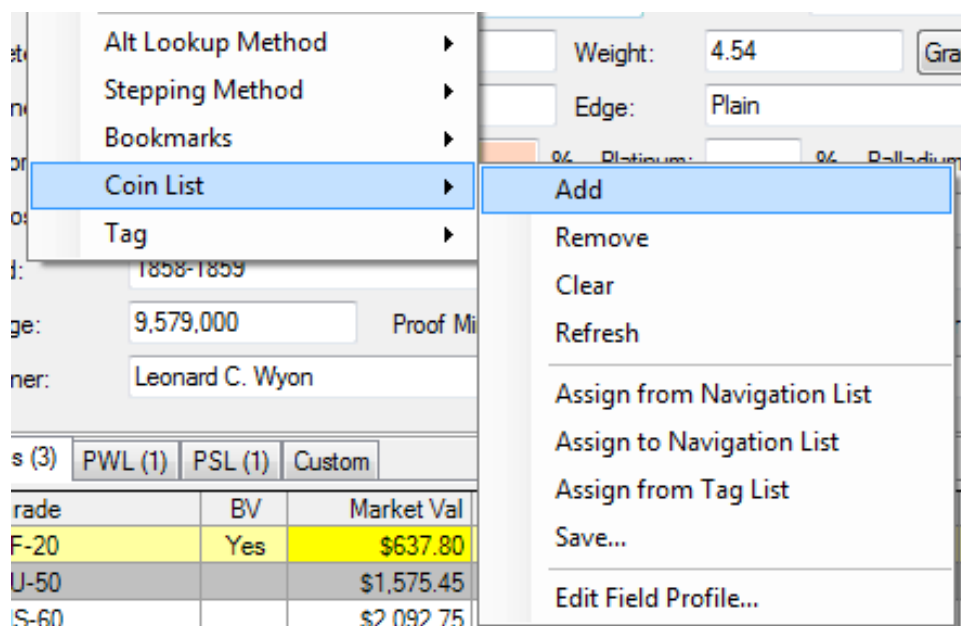
Toolbar Options



1	Add the current coin to the end of the coin list.
2	Removes the most recent coin added, or if you've selected one or more specific records in the list, only the selection will be removed. This does not remove the record from your inventory.
3	This clears all records from the coin list.
4	The active navigation list will be transferred to the coin list. Whatever records were in the coin list before the transfer will be lost.
5	This option transfers the coin list to the active navigation list. The contents of the existing navigation list are discarded.
6	The contents of the current tag list are transferred to the coin list, replacing the existing list.
7	The coin list will be saved to a navigation list file.
8	The fields within the coin list can be edited to show more, less, or different coin attributes. The field profile editor is used to configure the fields to be used in viewer. Only the primary coin attributes can be added as fields to the coin list viewer.
9	Since the coin list maintains its own internal connection to the country file using special files to contain a copy of the coin records, these files will not contain any records you may delete from the main EzCoin application. You can use this option to refresh the coin list as needed.
10	The left side of the coin list window can show an image pane area, similar to what the report viewer shows. Use this button to show or hide the image pane.

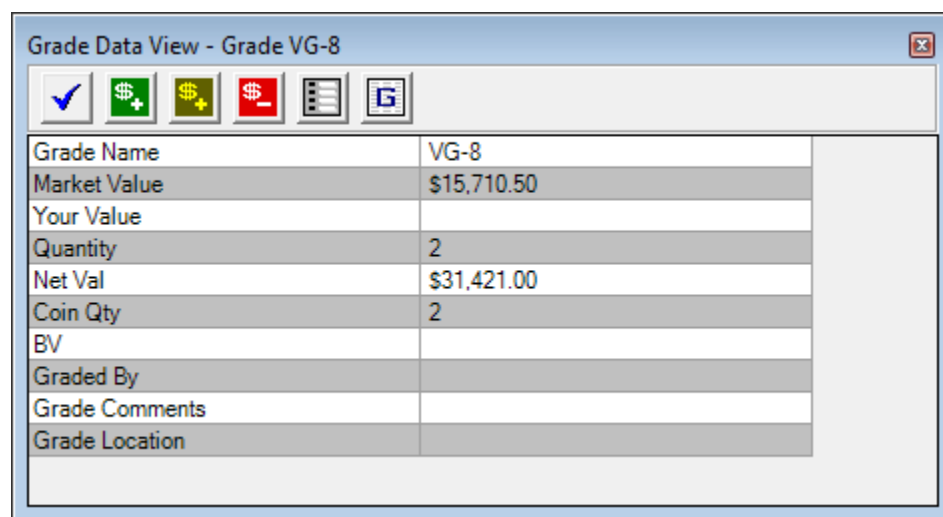
Menu Options

The coin list options are all contained under the **Coin List** option in the **Navigate** menu. These options mimic the buttons in the coin list viewer window.



Grade Data Viewer

This window shows a vertical presentation format for the current selected row in the Grades tab of the main EzCoin window. The window can be displayed using the **Grade Data Viewer** option under the **View** menu.



The window is a very simple design. It shows the same fields as in the main data grid, but oriented using a top down list. You can resize this window to show as many fields as needed. As you select new rows in the main window data grid, this view will always be updated at the same time to show the selected row's field data.

You can edit the data by double clicking anywhere within the vertical field list.

The buttons across the top of the window mimic the functionality of similar buttons in the main EzCoin window under the grades data grid.

Comments

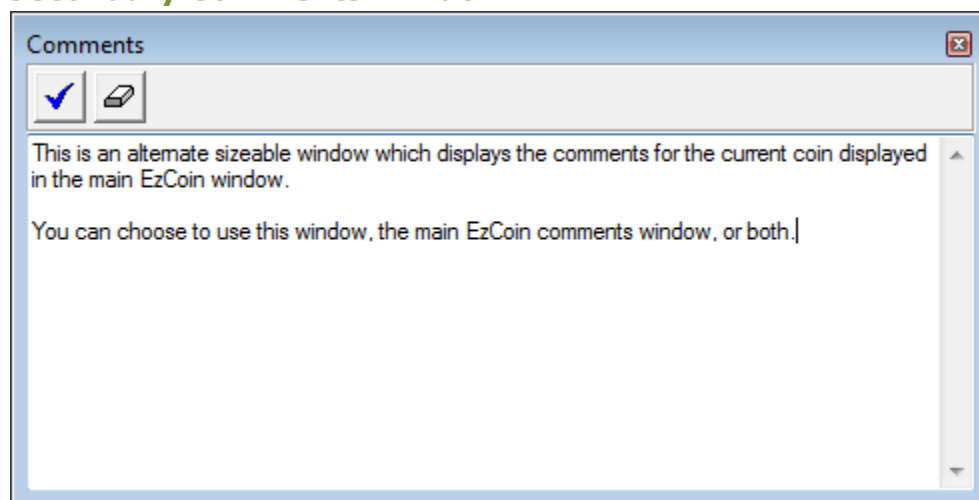
Comments are shown as a small window below the coin images and the coin description. The images and comments share the same vertical space within the main EzCoin window. You can click + drag the area between the images and comments to reallocate the shared space. If you drag downward to completely hide the comments window, then you will need to use the alternate comments window to view them.

Main Window Comments Area



You can display the comments in a secondary window using the **Comments Windows** option from the **View** menu.

Secondary Comments Window



Use the blue checkmark button in the comments window to save your coin changes. The eraser icon will clear the current comment text.

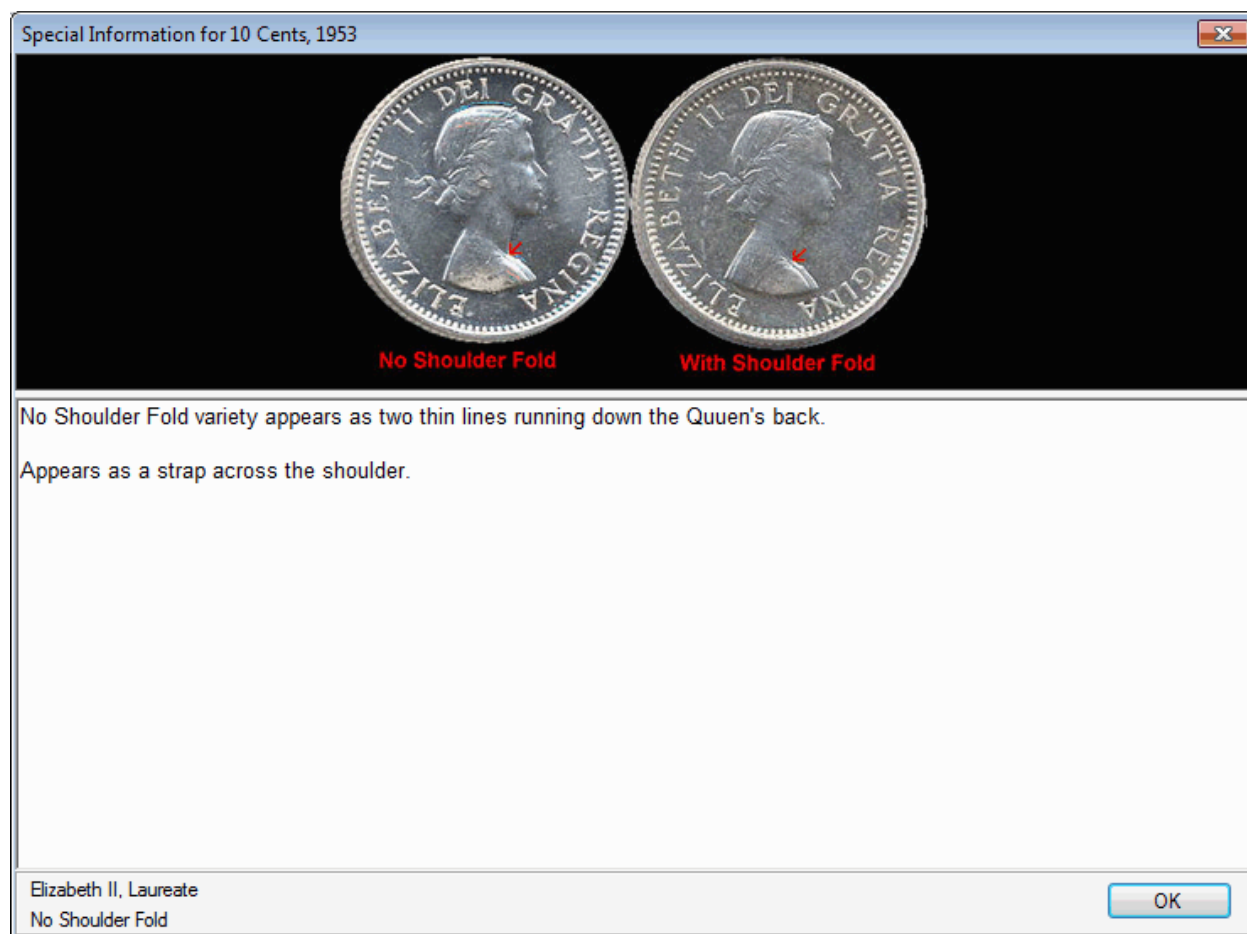
Special Notes and Information

For pre-supplied country files, SoftPro may provide additional information for some coin records, in the form of comments or images to convey this information. You can determine if special information is available based on the status of 2 icons in the main toolbar window.



The special information and notes buttons will be enabled when the associated type of information is present for the current coin on screen.

Simply click on one of these buttons to show the information.



Special information windows may have images or text comments. Special notes will only contain text comments.

Working with Country Files

EzCoin uses a single database file to store each country. These files are located in the DB folder in the EzCoin installation file and have an extension of .SDF. Country files supplied by SoftPro will contain pre-supplied coin information, and will need to be initialized for first-time use. When opening a country file for the first time, you will be asked to confirm a one-time configuration of the file. This task is relatively quick and is required before you can use the file.

Trial (Demo) and Release Country Files

Trial versions of EzCoin can only work with demonstration versions of country files. A trial country has a limited activation period (approximately 30 days) and will only contain a limited subset of pre-supplied coin information and images. In addition, some of the more advanced features of EzCoin will not be available with the trial version.

Once you register EzCoin, release versions of country files can now be used. However, trial versions will no longer function with a registered EzCoin. Trial country files can't work with a registered EzCoin and registered versions of EzCoin can't open trial country files.

Converting a Trial Country to Release

If you have inventoried information into a trial country file and wish to import this into a Release version, you can do so using the Secure Export feature. Simply open a trial country BEFORE you enter an activation code for EzCoin. Then choose the Secure Export option to save all your inventoried data to a ZIP archive file. After activating EzCoin, open the release version of the same country file as the trial version. Then use the Secure Import option to load of the trial data into the country file. **Note:** You will NOT be able to export the data *after* activating EzCoin, since a demo country can't be opened with the release version of the application.

Opening a Country File

There are a few ways in which to open a country file:

- Choose **Open** from the **File** menu. This will provide a standard Windows file open dialog pointing to the DB folder (or DemoDB for the trial version of EzCoin). Select any SDF file from the list and click the Open button.
- Use the **Open with List** option from the File menu to show a window with a list of country files, their country names (country identity of origin) and their descriptions. This window will also show the current build version of the country as well as an image of the country's flag.

- Use the **Recent Files Open** submenu to access the most recent countries opened. EzCoin maintains a list of the last 4 country files opened.
- Enable a general preference option to automatically open the country file which was previously opened when you closed the EzCoin application.

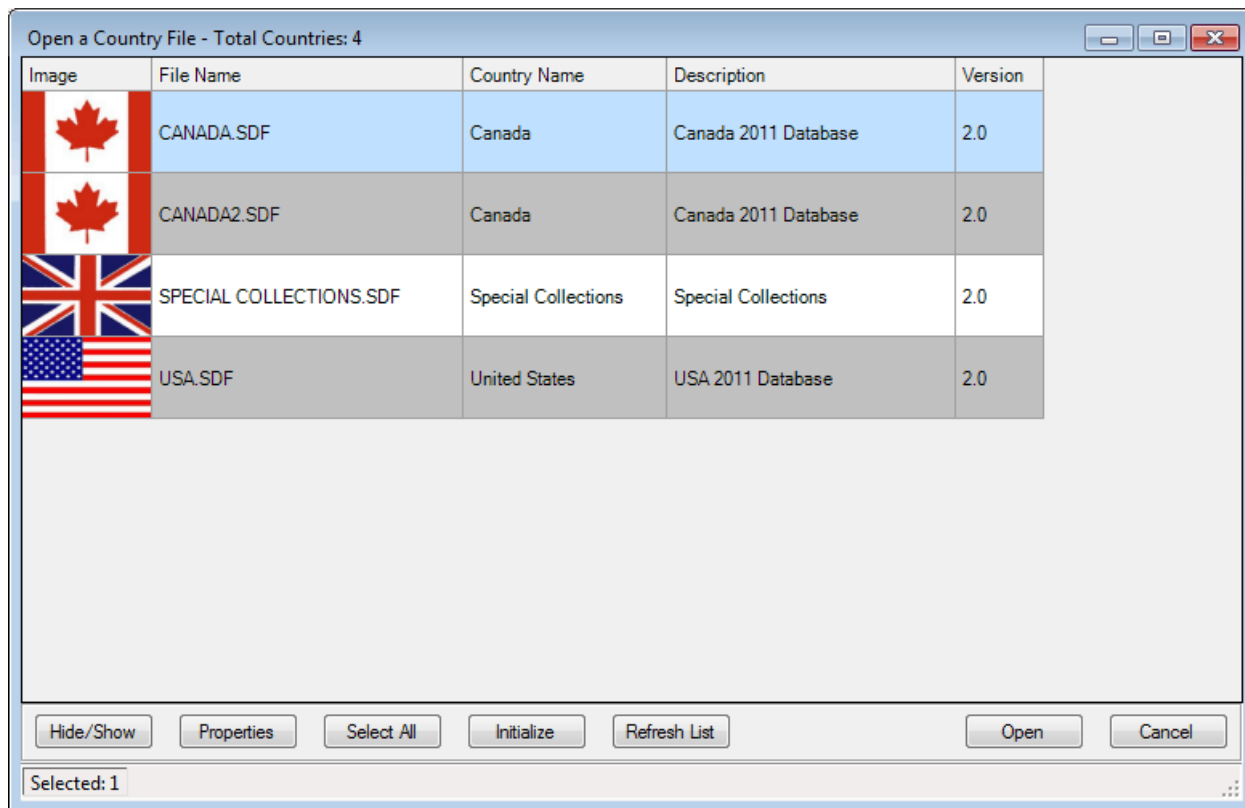
Automatic Backup and Restoration

A general preference option determines if EzCoin will automatically create a backup of your country file if it can be successfully opened. EzCoin will make a 100% copy of the SDF file in the Backup folder.

If for any reason a country file could not be opened, EzCoin will attempt to automatically restore the previous backup copy if it's available.

EzCoin Country File Browser

The Open with List option along with many other functions in EzCoin which require selection of country files will share a common browser window.



The list shows the country of origin (Country Name), description, file name, and build version. All current country files are on version 2.0 of the file format.

The action button to the left of the Exit button will vary depending on the EzCoin option you select (the example screen is for Compacting a country file).

The 5 buttons on the left are shared for all options which use this browser.

Click **Hide/Show** to change the visibility of country files on this window. You will be shown a selection of choices:



Un-opened country files are pre-supplied from SoftPro and have never been accessed from EzCoin. You can show/hide these types of files, show all countries in the DB folder, or hide the currently selected countries in the list.

Click on **Properties** to see statistical information for the selected country.

The **Initialize** button allows you to configure all selected countries for first time use. Normally, this activity is performed one time as you open each country file.

EzCoin maintains an *installation registry* for all country files. If for some reason, you have manually removed or added country files directly within the DB folder of EzCoin, then they will not appear in the registered list. The **Refresh List** button will examine each country file and update the country registry if needed.

Double clicking any row in the list can be used as a shortcut for the action button. For a file open action, double clicking the row will open the associated country file.

A country which has never been opened at least one time will show un-initialized in the list. Until you open the file, EzCoin will not show any details about the country in the list, unless you choose the **Refresh List** or **Initialize** options.

Closing a Country

To close a country, you can choose the **Close** option from the **File** menu. However, a country file will automatically be closed when you open another country, and also when you close the EzCoin application.

Creating a New Country

If you want to create a new country, use the **New** option from the **File** menu.

Create a Custom Country File

Data File Name:

Country Reference:

Description:

Currency Conversion Factor: Currency Decimal Places:

Currency Symbol: ☐ Place currency symbol to the right ☒ Include this File in Grand Totals Reports

Source for Grades and Denominations:

Grades:

- Poor
- Fair
- AG
- G
- VG
- F
- VF
- EF
- P-1

Denominations:

- 1 Cent
- 3 Cents
- 5 Cents
- 10 Cents
- 20 Cents
- 25 Cents
- 50 Cents
- 1 Dollar
- 2 Dollars

Denominations... Grades... Labels... Create Cancel

Data File Name	This is the actual file name the country will be created as. The .SDF extension is not required to be entered here. EzCoin will default the country file name if you choose a country reference from the dropdown list. You will not be allowed to create a country file if the name is already in use.
Country Reference	All custom and pre-supplied countries are provided in this dropdown list. You can choose any of them from the list, or create a custom country reference by simply entering a new text value in the dropdown field.
Description	The description is pre-populated when choosing a country reference from the dropdown list. To enter a new description, enter any text value of your choosing.
Currency Factor	The default currency conversion rate is 1.0, which means the country defaults to U.S. Dollar (USD) currency values,

	which is how pre-supplied country prices are provided. If you set a new conversion rate, EzCoin will automatically adjust prices and values as needed on screen and in printed reports. Internally, the currency is always stored in U.S. dollars.
Currency Decimals	The number of decimal places for the fractional part of the currency value. The default value is 2, which corresponds to cents in U.S. dollars.
Currency Symbol	The currency symbol is an arbitrary text value, which can be placed to the left or right of the currency value. The default value is the U.S. currency dollar (\$) symbol, and is placed to the left. You can use more than one character for the symbol and it can include spaces.
Include in Grand Totals	Check this option to include this country in the grand totals reports. If not checked, EzCoin will exclude it from the report.

Country Labels

Click the **Labels** button to define custom labels for the 4 alternate catalog ID values, serial number and location fields. EzCoin will assign default label text for you should you choose not to customize them.

Grade and Denomination Source

You will need to assign a grade list and denomination list for any custom country. If you want to use grades and denominations from an existing country file, choose an SDF file from the dropdown list.

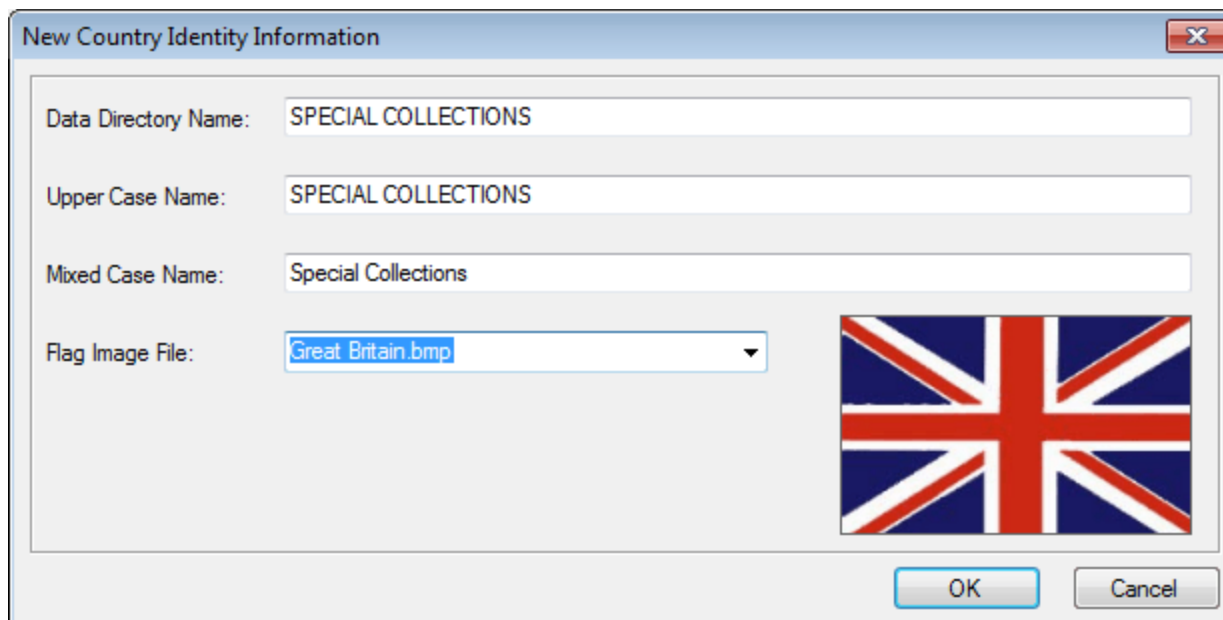
To assign grades or denominations from an exported data file, you the **Grades** or **Denominations** buttons.

You will need to export a grade configuration to a grade (.GRD) file to use the Grades button.

You will need to export a denominations configuration to a denominations (.DEN) file to use the Denominations button.

Custom Country Creation

If you enter a Country reference which isn't in the current dropdown list of available supplied/custom countries, then a second window will be displayed, requesting additional information before the file can be created.



The screenshot shows a Windows-style dialog box titled "New Country Identity Information". It contains four text input fields and a dropdown menu. The first three fields are labeled "Data Directory Name:", "Upper Case Name:", and "Mixed Case Name:", each followed by a text box containing "SPECIAL COLLECTIONS", "SPECIAL COLLECTIONS", and "Special Collections" respectively. The fourth field is labeled "Flag Image File:" followed by a dropdown menu showing "Great Britain.bmp". To the right of the dropdown menu is a small image of the Union Jack flag. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

This window provides the basic information needed to register a new country type with EzCoin. The identity doesn't have to be a physical country per se; any type of naming convention of your choice will work.

The data directory name uniquely identifies the country, and determines the folder name for custom images.

The upper case and mixed case names are usually the same.

The flag/image dropdown list contains all files installed under the Images\~~Flags subfolders in the EzCoin installation path. If you intend to create custom flag images, you need to adhere to the proper dimensions for the small (80 pixels width by 50 pixels tall) and large (176 x 110) files. Each file must have the same name, and be located in their respective Small/Large subfolders.

Once a country file is created, you can open it in EzCoin. The file will not have any coin information in it. As a custom country format, you are responsible for populating the data. If you want to make use of pre-supplied country information in a new country file, you can use the duplicate or merge utilities.

Importing Data from Prior Versions of EzCoin

If you have a previous version of EzCoin with the Version 2 Export menu option, you can export all of your inventoried data to a special archive file with an extension of .EZ2. Use the Import from Prior EzCoin option from the File menu in EzCoin 2 to populate the data into an existing country file.

Import Country from EzCoin Version 1

Country Name: Canada

Description: Canada 2011 Database

Original File: Canada.dat Inventoried Records: 1,623

How to copy the coin Location field in new EzCoin:

☒ Main Location and Grade Locations ☐ Main Location Only ☐ Grade Locations Only

☒ Link this country with pre-supplied data if available ☒ Copy user values to market values if empty

☒ Preserve your custom grade values from version 1 ☒ Copy custom images to EzCoin Version 2

Custom Image File Location: F:\Images\EzCoinV1

Pre-Supplied Source: CANADA.SDF

New File Name: CANADA.SDF

New Description: Canada 2011 Database

Open File... Import Cancel

CANADA

Use the **Open File** button to browse for a version 1 export file. If the archive contents are validated without error, the following information is displayed at the top:

- Name of the country of origin
- The country file description
- The original EzCoin version 1 data file the export was created from
- The number of inventoried coin records

Below this information are some import options.

Location Copy	EzCoin version 2 contains location fields for both the primary coin record and for individual grades within the same coin record. When importing the location field, you
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	will need to indicate how this field is copied.
Link Pre-Supplied	If the country of origin can be referenced to any installed pre-supplied country in EzCoin version 2, then entries will appear in the pre-supplied dropdown list and the pre-supplied checkbox option will be enabled and checked by default. Uncheck this option to create a custom country. If no pre-supplied data can be matched based on country name, you will not have any linking option.
Copy Custom Images	<p>Check this option to copy all custom images from version 1 of EzCoin to version 2. Note that this feature is just a simple shortcut to physically make copies of all image files from their version 1 location for version 2. You will need to set the path for version 1 images if you choose this option.</p> <p><i>Please read the section at the end of this help topic regarding image links between version 1 and 2 of EzCoin.</i></p>
Preserve Custom Grade Values	This option determines if you wish to keep any custom grade values for pre-supplied coin records in version 2 which contain the latest market value prices. If you preserve your custom values, then your version 1 prices will supersede the latest version 2 pricing from SoftPro. If this option is not checked, then custom values are only retained if there are no pre-supplied prices for version 2 grades, or for any record which is a custom variety.
Market Value Assignment	<p>Unlike EzCoin version 1, you are permitted to define or change a market value for any grade, with the understanding that any pre-supplied value from SoftPro could potentially replace it on a data patch.</p> <p>Since many grades may lack pre-supplied values, the market value should be populated whenever possible, as opposed to strictly using the user value field. When you check this option, any user value will copy over to the market value for any coin grade <u>where a market value doesn't currently exist</u>.</p>
New File Name	The file name will be set based on the version 1 file name and/or the pre-supplied country file source. See the notes below on importing into an existing file versus creating a new file.

New Description	If you want to customize/change the description for this country, enter a new value in this field.
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New Versus Existing Country

If you import into an existing version 2 country file, all customizations and inventoried information are discarded.

If you choose to install into a new country file, with the pre-supplied link option, all pre-supplied version 2 information will be merged with your inventoried coin data into the new file.

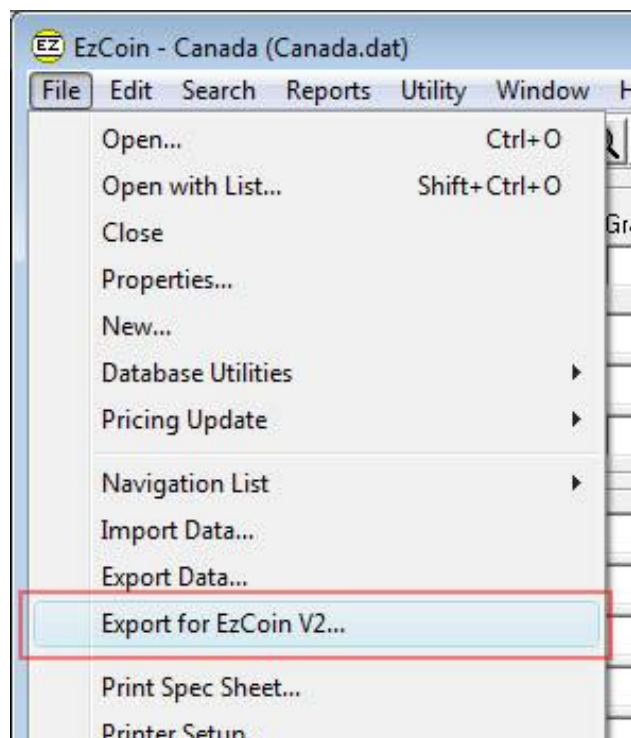
Note that you may not import pre-supplied version 1 coin data into version 2. EzCoin version 1 pre-supplied information is not compatible with version 2. If you need the pre-supplied version 2 data for a country, you will need to purchase the country file data with EzCoin.

Adding Version 1 Inventoried Data to Version 2 Data

If you have inventoried coin records to the target version 2 country file and wish to add version 1 data on top of this, you can't do this directly through the import utility. You will need to import version 1 data into a new country, and then use the country file merge utility to combine the 2 files together.

Exporting from EzCoin Version 1

The latest version of EzCoin version 1 will contain a menu option to export the current open country as a special archive file.



If you don't see the Export for EzCoin V2 menu option in version 1 of EzCoin, you will need to download the latest version from SoftPro.

Selecting this menu option will display a small dialog window.



Click on the **Export** button and you will be prompted to enter a file name. An extension of .EZ2 will automatically be added to the file name, and it will be saved by default to the **ExpEz2** subfolder of EzCoin.

This will be the file used for the import option in EzCoin version 2.

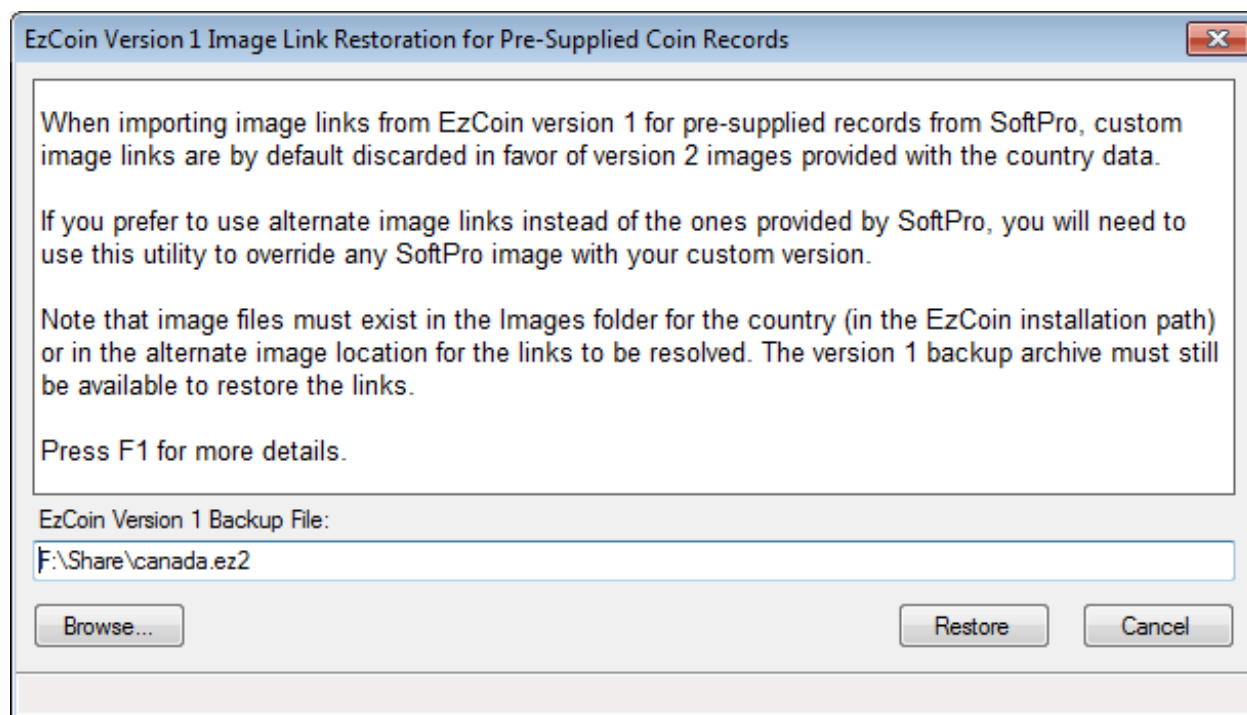
Pre-Supplied Image Link Restoration

By default, image links (the file name references to images stored in a pre-supplied library from SoftPro or image files stored on your PC) for pre-supplied coin records will be set to EzCoin Version 2 file names.

This may produce unwanted results if you've overridden the images with your own custom versions. The ideal way to override pre-supplied images is to put files with identical names into the Images subfolder in EzCoin using the Image Link utility. EzCoin will always take a custom image file with the same name as a pre-supplied image.

However, if you used a different file name in version 1 of EzCoin, you will lose the custom link when using the import utility. For this reason, a separate Image Link Restoration option is provided (**File** menu, **Export and Import, Restore Image Links from Version 1**).

Make sure the country file is opened for image link restoration. Choose the menu option to see the following screen.



Use the **Browse** button to select a version 1 backup file (.EZ2 extension).

Click on Restore to restore all custom image links for pre-supplied coin records. Note that custom variety coin records will already have the correct image links and will be unaffected.

EzCoin will generate a log file of any restored links.

Note that you should have chosen the copy image files from the EzCoin Version 1 Import Utility, so that the actual image files will be located in the correct folder.

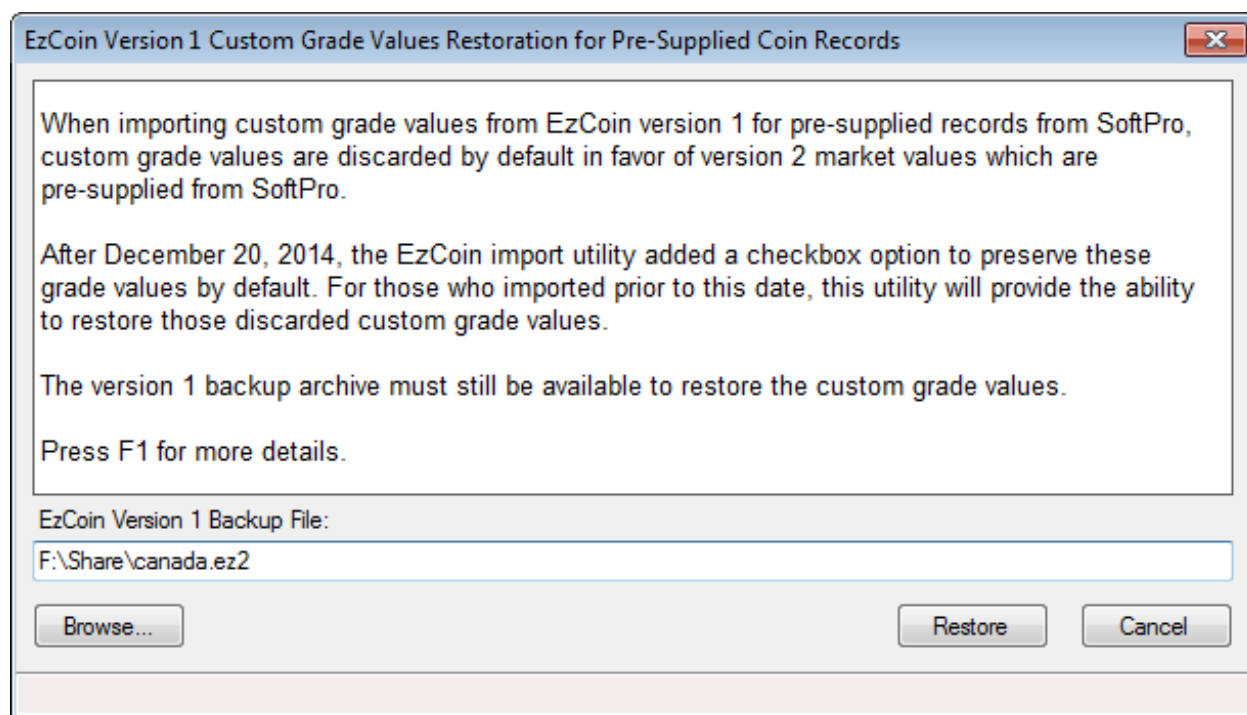
Restoring or Removing Version 1 Custom Grade Values

The initial release of EzCoin version 2 didn't provide an option to preserve custom grade values from version 1, for any coin records which are pre-supplied in version 2 from SoftPro with the latest market prices. In effect, your custom values would have been superseded by default with the latest version 2 market prices from SoftPro.

It's important to provide you the choice to remove or keep these version 1 custom prices. As such, after December 20, 2014, the Version 1 import option had the Preserve Custom Grade Values option added, which is reflected in this help topic.

For users who have already imported their version 1 coin data into version 2 prior to December 20, 2014, a separate utility has been added to the **Export and Import** options under the **File** menu named **Restore V1 Custom Grade Values**.

Make sure the country file is opened for grade value restoration. Choose the menu option to see the following screen.



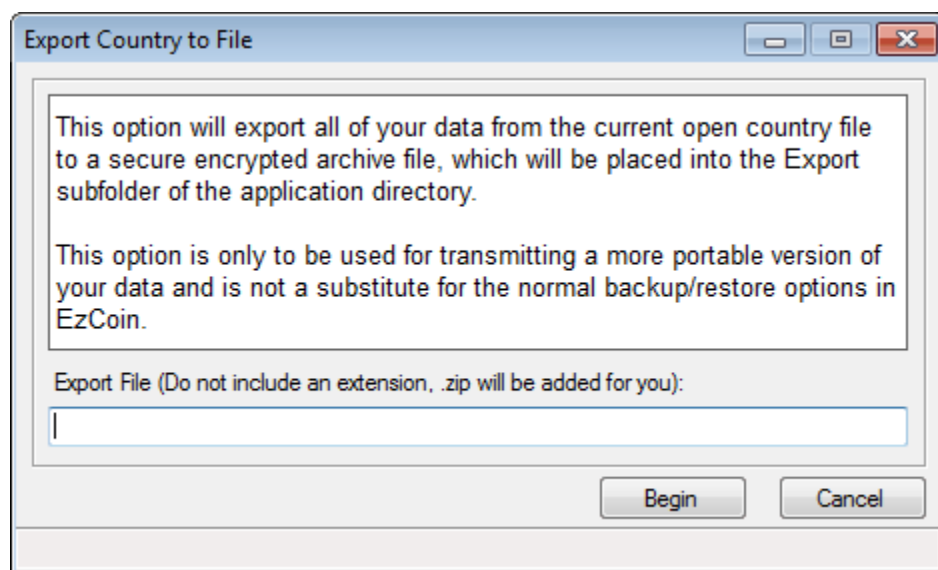
Use the **Browse** button to select a version 1 backup file (.EZ2 extension).

Click on Restore to restore all custom grade values for pre-supplied coin records. Note that custom variety coin records will already have the correct custom grade values and will be unaffected, as will any coin grade values where there is no associated version 2 pre-supplied market value.

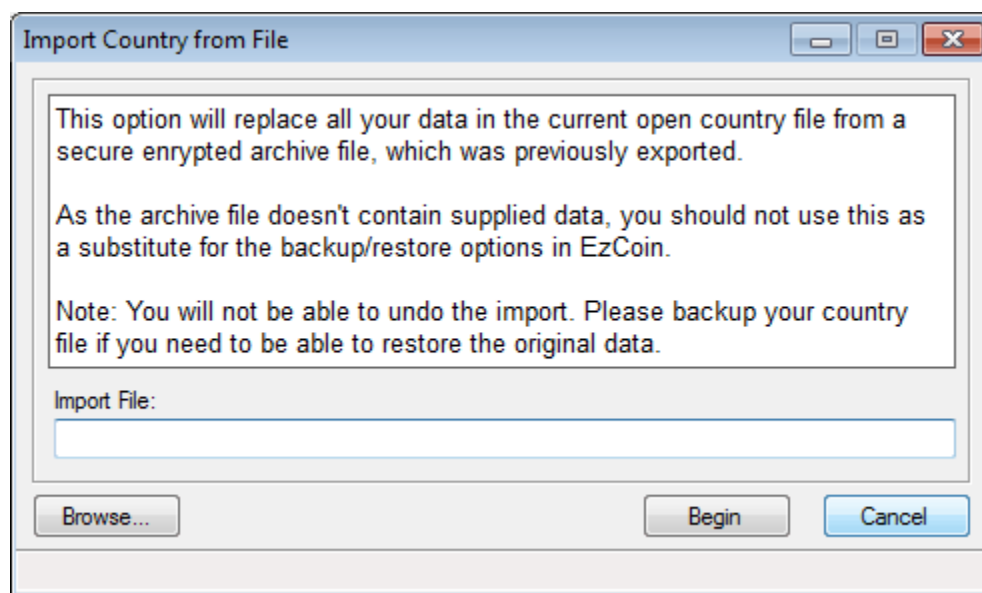
EzCoin will generate a log file of any restored values.

Secure Import and Export

This is available from the Export and Import option under the File menu. A secure export is a special encrypted portable ZIP archive of your inventoried coin information. It's not intended to be used as a replacement for the archival backup process in EzCoin. Secure data exports are designed to take a snapshot of your country data for troubleshooting or data transfers between multiple systems. The ZIP archive will be much smaller than the SDF file equivalent.



For any open country file, simply enter the name of a file and click the **Begin** button. The files are saved to the Export folder in the EzCoin application path.

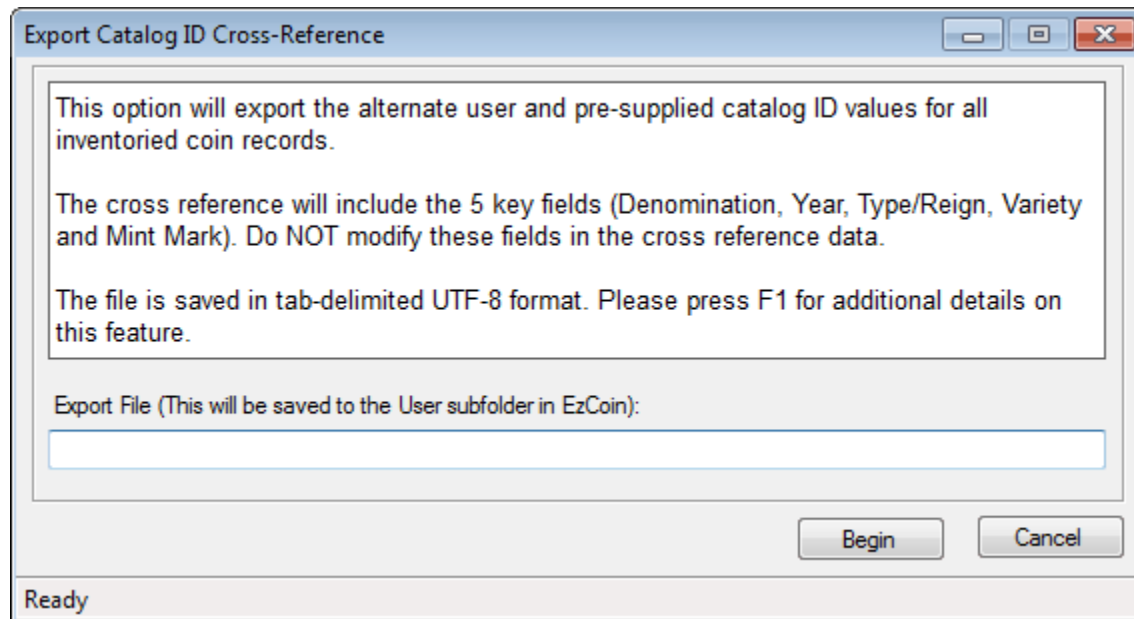


For importing the data back into the country file, use the **Browse** button to locate an export file (default location will be the Export folder), then click the **Begin**

button. Note that EzCoin will close the country file before importing, as the file can't be opened during the restoration process.

Cross Reference Import and Export

Cross reference export and import options are available from the **File** menu under the **Export and Import** submenu. This is an advanced feature which allows you to review and revise the alternate catalogue ID data using a tool external to EzCoin such as Microsoft Excel.



Since it's possible that data values may contain characters with special accents to support multi-lingual text, the export files are always saved in UTF-8 format.

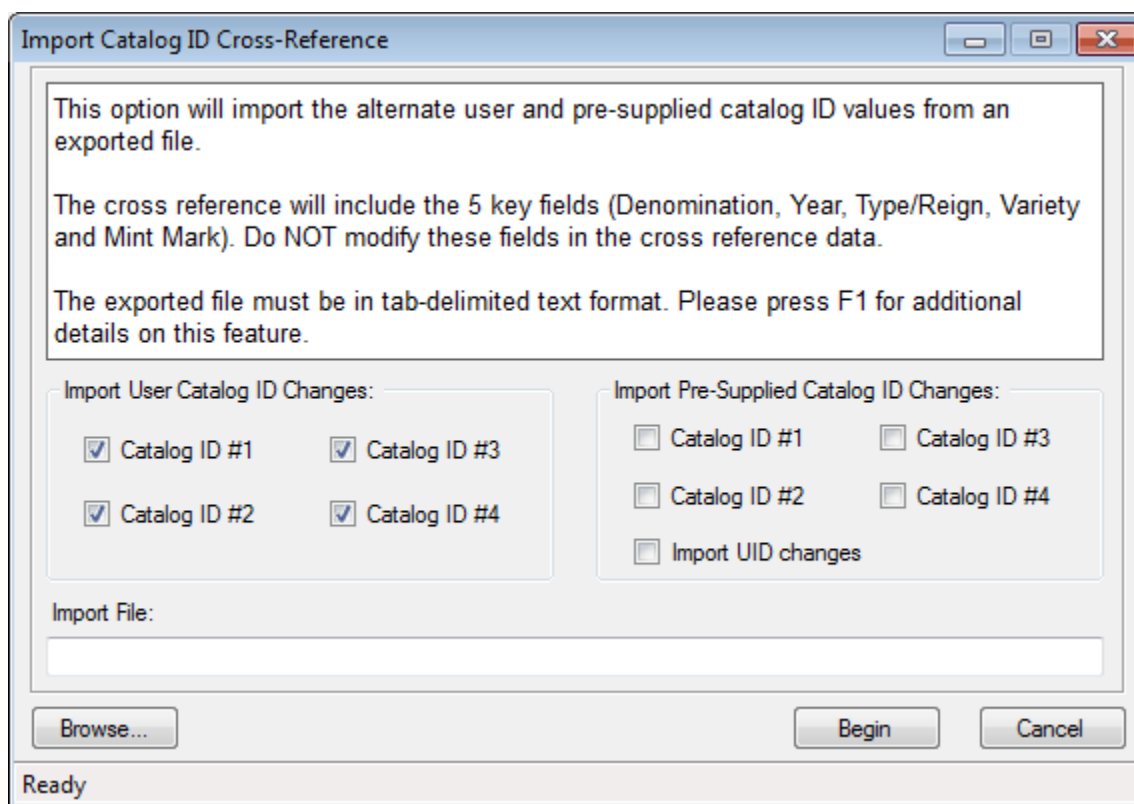
The fields exported will be the following, and the first row in the data represents the field labels, which must never be changed, or you will never be able to re-import the data.

- Denomination
- Year
- Type/Reign
- Variety
- Mint Mark
- UID
- Supplied Cat ID 1, 2, 3, 4 (Only if pre-supplied number is defined)
- User Cat ID 1
- User Cat ID 2
- User Cat ID 3
- User Cat ID 4

The export file will only contain inventoried records. If you import to something like Excel, which prompts you to set the type of data for each column, please make sure all columns are treated as text fields, and not converted to numbers.

You must not change the 5 key fields (Denomination, Year, Type/Reign, Variety, Mint Mark), as this data is used to match the coin record when importing. If you modify a UID or pre-supplied catalog ID value, be aware that any supplied data updates from SoftPro with data in this fields will replace your version of this data.

When you are ready to import the cross reference back into EzCoin, choose the import option from the menu.



Use the checkbox fields to selectively choose which ID numbering system to import. Note that this feature does not create a country file backup.

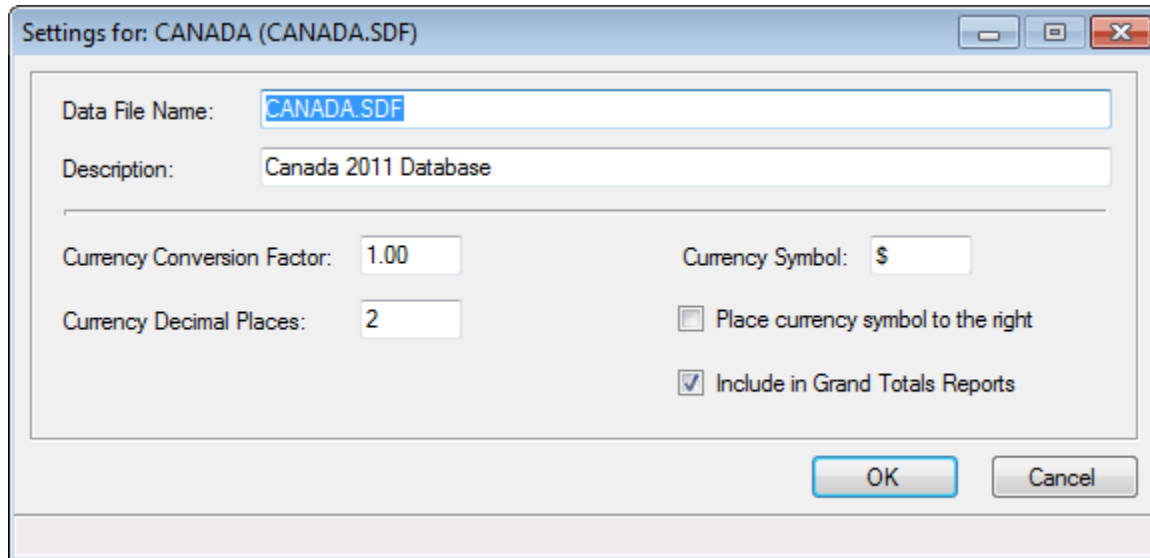
It's recommended you retain the original export file unaltered, so that you can always restore the cross reference data if needed from that backup.

A Note About Saving From Excel

When saving changes to text export files from Excel, ensure that you always choose the "Save As" option and not simply "Save", as this may alter the content of file to be different than what was exported. Either save the file as Unicode format or Tab-Delimited text as a new file to ensure special characters are preserved.

Country File Settings

This option in the **File** menu allows you to change some basic settings for the current open country file.



You can change the same basic information which is available when creating a new country. Refer to the country file creation topic in this manual for a summary of the various settings in this window.

You can change the data file name as long as it's not in use by any other country file.

Changing the currency conversion factor will automatically result in price and value recalculations for the country file when you close the dialog window.

Country File Properties

This option is available in the **File** menu and also by clicking the **Info** icon in the top right corner of the EzCoin main window. It will display basic summary statistics for the current open country file.


Properties for Country File - CANADA.SDF (Canada 2011 Database)

Data File Name: CANADA.SDF

Country Name: CANADA

Description: Canada 2011 Database

Image Folder: CANADA File Size: 7,327,744



Created On	Thursday, March 31, 2011
File Type	Supplied
Pricing as Of	Monday, May 12, 2014
Data Version	2.0
Include in Grand Totals Report	Yes
Alternate Supplied Catalog 1	PCGS#
Alternate Supplied Catalog 2	None
Alternate Supplied Catalog 3	None
Alternate Supplied Catalog 4	None
User Catalog Label 1	Grading
User Catalog Label 2	User Catalog 2
User Catalog Label 3	User Cat 3 #
User Catalog Label 4	User Cat 4 #
Denominations	31
Currency Format	Rate: 1.00 Decimals: 2 Symbol: \$

Flag Image... OK

Basic information is displayed in a scrollable spreadsheet view.

Note that you can change the flag image for any country file after it's been created. You must choose from an existing flag image or create one yourself.

Country File Utilities

This submenu under the **File** menu contains several important options for maintaining and supporting the data contained in your country files. Some of these options require a country file to be opened, and others will prompt you to close the country file for proceeding.

Supplied Data and Pricing Updates

When SoftPro issues supplied data and pricing updates for country files, they are provided as special files which are transparently applied to the read-only pre-supplied repository inside the country file.

An EzCoin country file consists of two parts (let's call them Parts A and B):

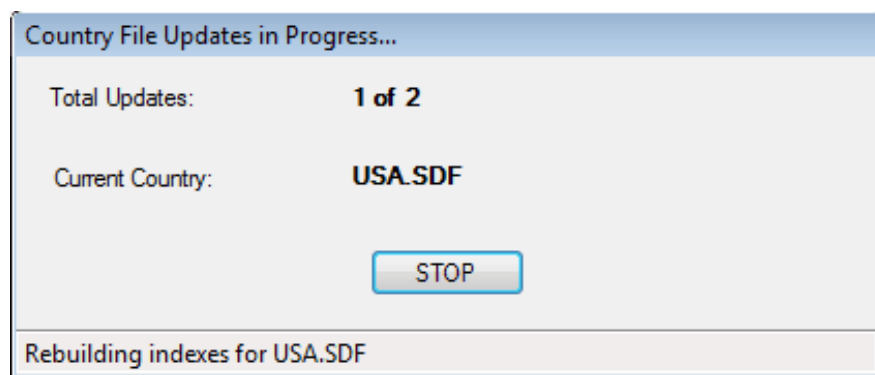
- Part A is a read-only copy of all pre-supplied coin information and prices. This is how new country files are provided on the original EzCoin CD/DVD media.
- Part B is a copy of all of the same information as in Part A, PLUS any additional inventoried information you add. Almost all of the pre-supplied information, including prices, can be modified, and this is all saved in the second part of the file.

When supplied updates are applied to a country file, EzCoin will only make the updates to the read-only copy (Part A) of the file. Your inventoried data and the modifiable pre-supplied data (Part B) are left intact. A pre-supplied update will synchronize the Part A data to the Part B data.

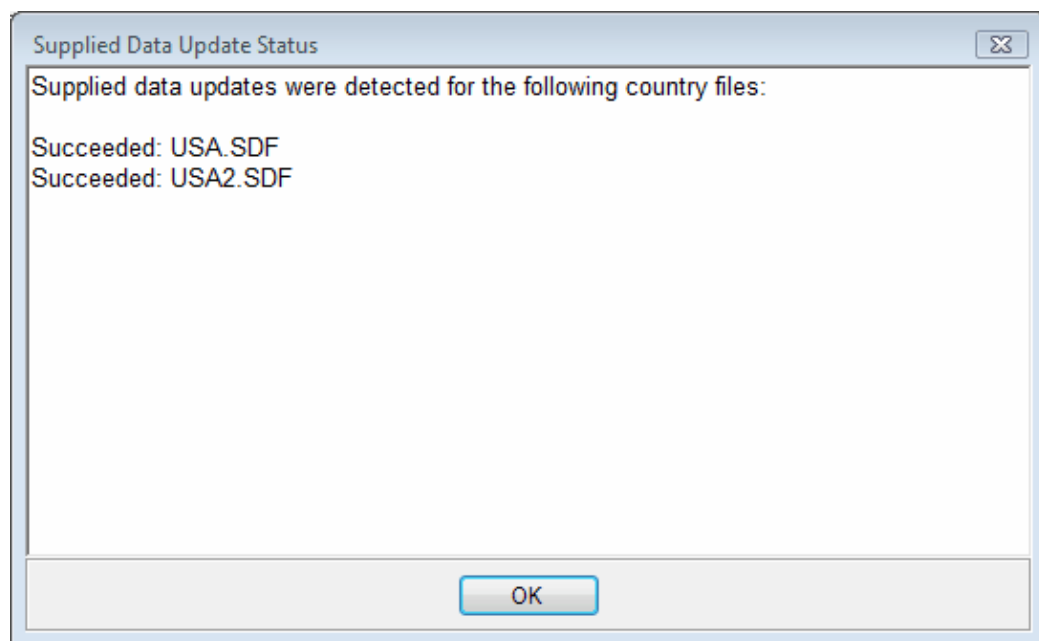
EzUpdate and Supplied Data Updates

The EzUpdate application is used to apply supplied pricing and data updates to EzCoin. The update application itself doesn't have any functionality to work with country files – that capability is exclusive to EzCoin. What EzUpdate does is place country update files into the EzCoin application path, to prepare them for import the next time you run EzCoin.

When EzCoin starts with pending updates (there can be multiple country files pending, EzCoin will handle all of them in order), you will see a small dialog window appear, which you will not be able to cancel (but you can click STOP and the process will stop AFTER the current file has been updated).



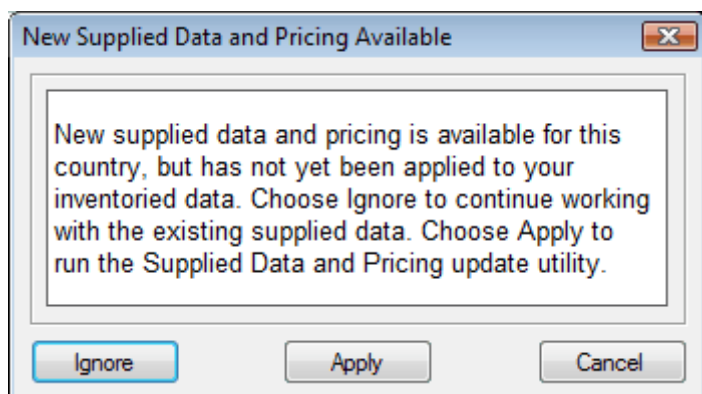
EzCoin will apply updates to every country file which has pre-supplied data attached to it, even if the country is duplicated into more than one file. Once this process is completed, a summary dialog window will appear.



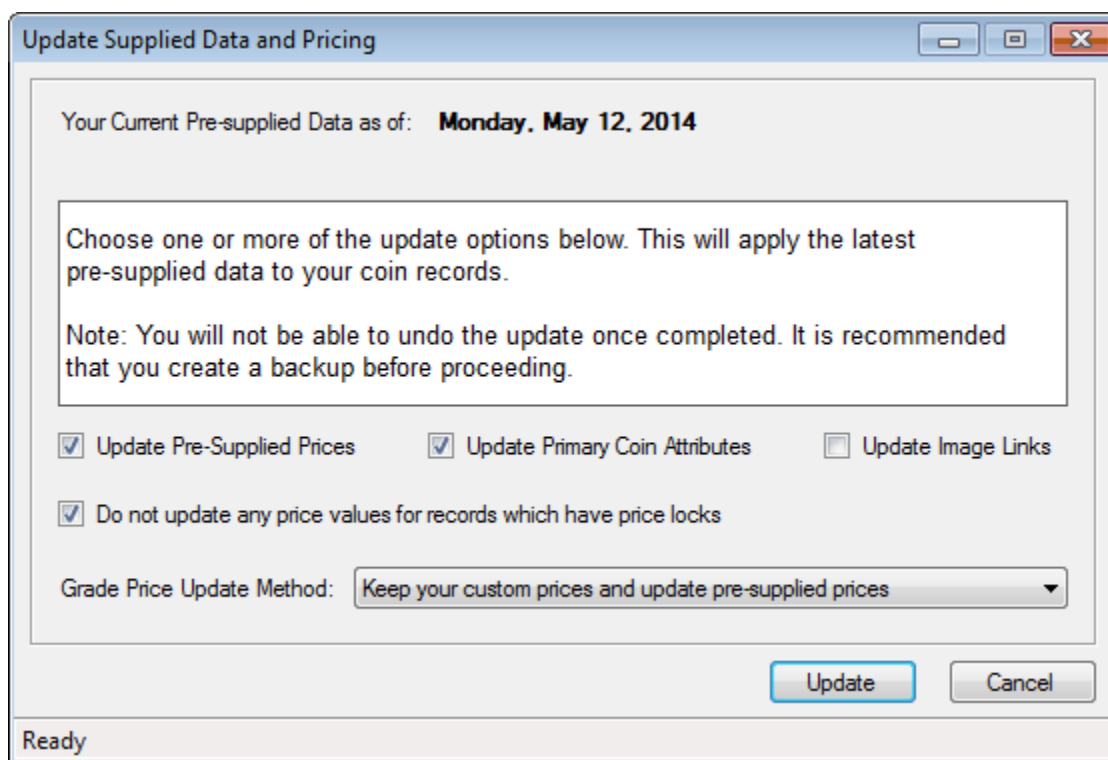
This dialog indicates which country files had supplied data updates applied. At this point, your inventoried data has NOT been affected, nor have any customizations you've made to pre-supplied records been touched. Only the read-only pre-supplied data repository in the country file has been updated.

EzCoin and Supplied Data Effective Dates

Each supplied data update has an effective date assigned to it. When you open a country file which has had a supplied data update applied to it, EzCoin will check the current data's effective date to see if new updates have been applied to the read-only copy of the coin information. If a newer date is detected, a small warning dialog will appear:



You can choose to ignore this dialog, cancel, or apply the update. Clicking **Ignore** turns off the nag dialog for this country – you will not get nagged again for this update. Clicking **Cancel** will skip the update process, however you will once more be nagged with this dialog the next time you open the country. If you click **Apply**, the supplied data and pricing update window will be shown. This is the same as choosing the similar named option from the **Country Date File Utilities** submenu.



The top of the window shows the current pre-supplied effective date of your copy of the coin data, and the effective date of the read-only copy of the same data. If your data is up-to-date, only one date will be shown – you can still re-apply the update, even if it's not needed.

The checkbox options allow you to choose what pre-supplied data to update.

Pre-Supplied Prices	All pre-supplied grade market values will be updated. Any custom grade market values associated with a pre-supplied coin record and its associated grades will replace your customized market value.
Primary Coin Attributes	Denomination, year, type/reign, variety, mint mark, pre-supplied alternate catalog ID values, period, mintage, designer, mint location, edge, weight, thickness, composition, description. If pre-supplied information for any of these attributes is blank for a coin record, your existing customized values will be left intact.
Image Links	Your custom image links are replaced with the pre-supplied image links. If EzCoin doesn't provide an image link, your custom links will be left intact.

Zero Price and Blank Data in Pre-Supplied Data

If SoftPro doesn't provide a price (i.e. market value for MS-65 for a coin) or data value (i.e. Designer or Thickness) for a given coin record, then no update is applied. That is, EzCoin will not try and write zero prices or empty data values to your copy of the pre-supplied data. A valid coin attribute has to be pre-supplied to be included in the update process.

Price Locks

The option named *Do not update any price values for records which have price locks* is used to control updates for coin records which you have applied a price lock to. EzCoin will leave the pre-supplied prices alone for any price locked records.

Grade Price Update Method

There are 3 available choices for how to update grade prices:

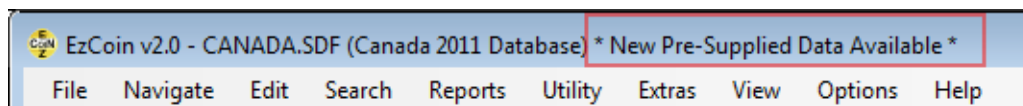
Keep your custom prices and update pre-supplied prices: Any price overrides you made on a per grade basis (i.e. you entered a value in the **Your Value** field in the main EzCoin window) will be left intact.

Zero out your custom prices and update pre-supplied prices: Any custom price override values you applied to coin records will be lost. This in effect will restore the market value of every grade back to pre-supplied values, with the latest effective pricing available.

Zero out your custom prices and retain current pre-supplied prices: This option basically resets the pricing structure for EzCoin to the default state you would get if the country were brand new, albeit with the existing pricing. The latest effective prices would exist only in the read-only repository of the country file.

Update Reminders

If you chose to ignore the dialog which warns you of pending updates when you open a country file, you can still see if new pricing is available by looking at the EzCoin main window title bar.



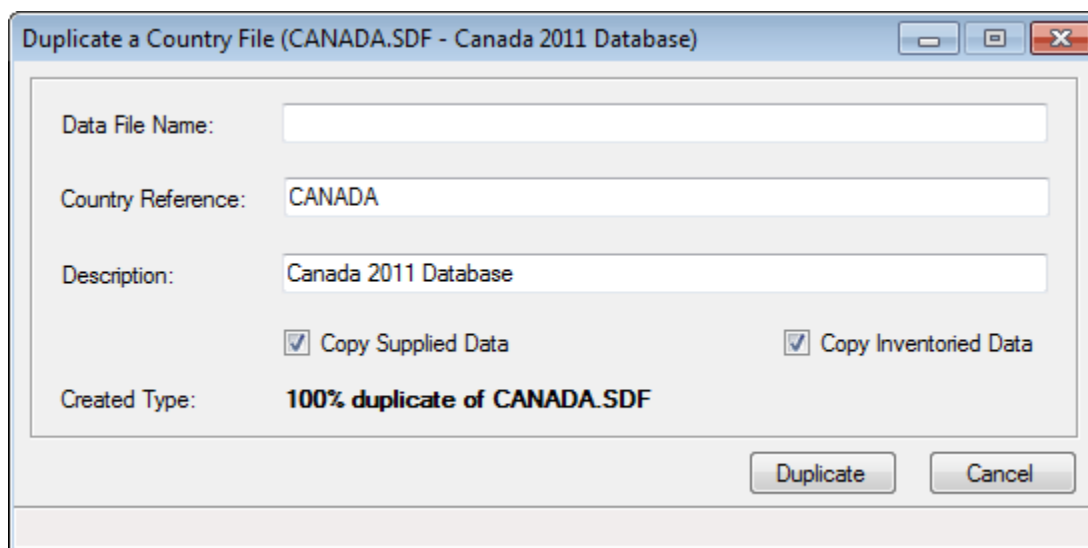
Automatic Backups

A general preference option is available in EzCoin to perform an automatic country file backup before applying a supplied data update. This option is enabled by default.

Note: Normal EzCoin archival backups only save your inventoried records. Since you may change pre-supplied data without adding a coin to your inventory, EzCoin will also include pre-supplied customizations in any backup archive. Supplied updates will always replace customizations of this type, if a value is not blank in the update data.

Duplicating a Country

You can make a copy of the current open country file with the duplicate country option.



When duplicating the country, you will provide the following information:

- The new file name, which can't be the same as any existing country file.
- The Country Reference is not modifiable – it's just there for your reference.

- The description is taken from the current country file. You can modify this as needed for the duplicated file.
- If you check the Copy Supplied Data option, then all pre-supplied information is copied into the duplicated file. If not checked, you will be creating a custom country file, which will no longer be part of supplied data updates.
- If you check the Copy Inventoried Data option, then all your inventoried information will be preserved in the duplicated country. The combination of these two checkbox options determines the type of duplicate file you are creating. Check both to make a 100% identical copy of the original file.

Merging Country Files

The merge utility allows you to combine one country file into a second file, or combine 2 files into a new third file.

Merge Two Country Files

Source Country: E:\SoftPro\EzCoin\EzCoin\bin\Debug\DB\CANADA2.SDF
Canada 2011 Database

Target Country: CANADA.SDF
Canada 2011 Database

If a coin record from the source country exists in the target country, then:
RECORD EXISTS: Append the source country record as a duplicate

If the coin record in the source country is not in the target country, then:
NEW RECORD: Add the record from the source country file

If supplied data exists, then:
Supplied Source: Use the supplied data which already exists in the target country

☐ Before merging countries, exclude all duplicate records from the source country file

Source and target will merge to Canada3.SDF

☒ Merge source + target into a new country file

Browse... Merge Cancel

Source and Target Files

The source country is always the file which information is taken from. It will not be altered in any way, and it can exist in the EzCoin DB folder or from any location on your system. Use the Browse button to locate a country SDF file, or choose one from the drop down list. The list will only show SDF files registered with your copy EzCoin.

The target file must always be in the EzCoin DB folder. You can choose any country file as long as the country of origin is identical. For example, you can't merge Canada and USA together, as they are not the same country of origin.

By default, EzCoin will merge the source file *into* the target file. The target country will contain the contents of both files (based on the merge attributes). If you want to merge the source and target to a brand new country file, check the *Merge into new country file* option at the bottom and you will be prompted for a new name and description for this file.

Record Exists Options

These options are applicable when a coin record number exists in both files based on the unique combination of the 5 primary coin fields: Denomination, Year, Type/Reign, Variety, and Mint Mark.

Append the source country record as a duplicate: If the coin record exists in both the source and target files, the source record will be set as a duplicate and the target's record will remain as the primary record.

Insert the source country record ahead of the existing record: This option makes the source record the primary one – the matching target record is duplicated.

Overwrite the target country's record from the source file: For matching coin records, the source record will replace the matching record in the target file.

Skip the source country record and don't add it: For matching coin records, the source record is ignored and the record in the target file is left as is.

New Record Options

These options are applicable when the coin record doesn't exist in the target file.

Add the record from the source country file: Add the source file record as a new coin record, which may or may not be a custom variety.

Skip the source country record and don't add it: The source file's record is ignored.

Supplied Data Exists Options

These options are only applicable if either the source or target files contain pre-supplied coin information. If both files are custom countries, this dropdown list is disabled.

Select a source and target file first: This appears in the list if you haven't selected both files. It's not really an option, just a visual cue.

No supplied data exists in either file: Both files are custom countries, therefore no choice will exist.

Erase the supplied data in the target country (Custom country): This option will result in a custom country – all pre-supplied information is discarded and supplied updates can no longer be applied to it.

Use the supplied data from the source country file: All pre-supplied data from the source file is copied to the target file. If any pre-supplied data already exists, it's discarded.

Use the supplied data which already exists in the target country: Pre-supplied information which already exists in the target file is left intact.

Excluding Duplicate Records

If you check this option, then all duplicate records in the source file are ignored. For example if a coin record exists 3 times in the source file for these key values:

- Denom.: 1 Cent
- Year: 1882
- Type: Victoria, Diadem, Provincial Leaves
- Variety: Obverse 1
- Mint Mk.: H

The main record is kept and the 2 duplicate records are skipped. Any existing duplicate records in the target file are left as is.

By default, EzCoin will merge the source file *into* the target file. The target country will contain the contents of both files (based on the merge attributes). If you want to merge the source and target to a brand new country file, check the *Merge into new country file* option at the bottom and you will be prompted for a new name and description for this file.

Record Exists Options

These options are applicable when a Scott/Catalog number exists in both files.

Append the source country record as a duplicate: If the Scott/Catalog numbers exist in both the source and target files, the source record will be set as a duplicate and the target's record will remain as the primary record.

Insert the source country record ahead of the existing record: This option makes the source record the primary one – the matching target record is duplicated.

Overwrite the target country's record from the source file: For collisions on Scott/Catalog number, the source record will replace the matching record in the target file.

Skip the source country record and don't add it: For matching Scott/Catalog numbers, the source record is ignored and the record in the target file is left as is.

New Record Options

These options are applicable when the Scott/Catalog number in the source file doesn't exist in the target file.

Add the record from the source country file: Add the source file record as a new Scott/Catalog number.

Skip the source country record and don't add it: The source file's record is ignored.

Supplied Data Exists Options

These options are only applicable if either the source or target files contain pre-supplied stamp information. If both files are custom countries, the dropdown list is disabled.

Select a source and target file first: This appears in the list if you haven't selected both files. It's not really an option, just a visual cue.

No supplied data exists in either file: Both files are custom countries, therefore no choice will exist.

Erase the supplied data in the target country (Custom country): This option will result in a custom country – all pre-supplied information is discarded and supplied updates can no longer be applied to it.

Use the supplied data from the source country file: All pre-supplied data from the source file is copied to the target file. If any pre-supplied data already exists, it's discarded.

Use the supplied data which already exists in the target country: Pre-supplied information which already exists in the target file is left intact.

Excluding Duplicate Records

If you check this option, then all duplicate records in the source file are ignored. For example, if Scott #500 exists in the source file as a main record and has 2 duplicate records, then main record is kept and the 2 duplicates are skipped. Any existing duplicate records in the target file are left as is.

Removing Country Files

When you open a country file in EzCoin, the file will be "registered". What this means is that EzCoin keeps a record of the file, how it's used and accumulates statistics on it for the purpose of grand totals reports and supplied data updates.

If you remove country files outside of EzCoin, you remove the file without removing it from EzCoin's country registry. EzCoin can usually adjust for this, but it's recommended that you use the built in functionality to remove country files you no longer need.

The remove country option uses the standard country list browser window. Select the countries you want to remove then click on the **Remove** button. **Note:** You will not be able to get the deleted files back unless you have a backup to restore from.

Backups and Restoration

EzCoin uses special ZIP format archive files to create backups of your data files. There are also automated backups, which simply copy a country file to a special subfolder in the EzCoin application path.

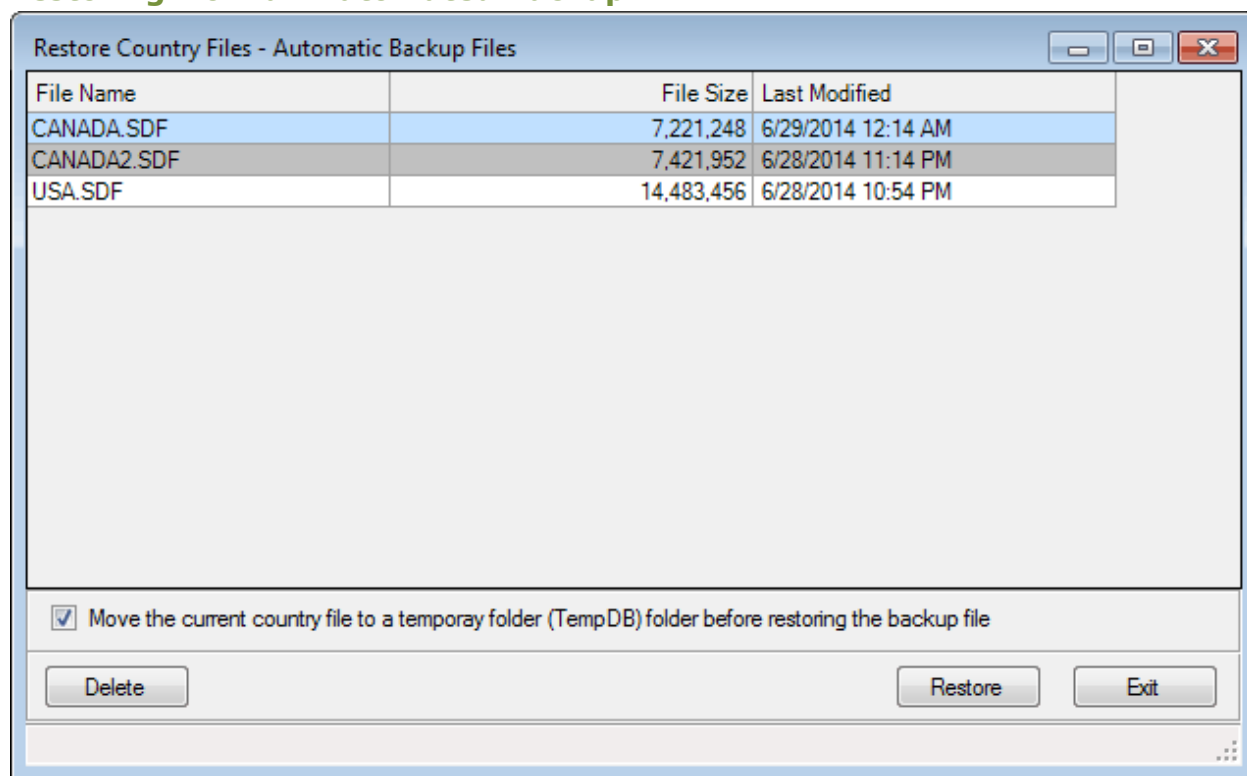
Automated Backups

The automated backup processes in EzCoin simply take the current SDF country file and copies it to another backup location. Preference options can disable some of these automated backups.

The following processes in EzCoin can have automated backups. Use the **Restore SDF Files** option under the country data file utilities submenu to restore these files.

Auto Backup	Automatic backups are performed every time you open a country file.
Merges	These backups take place just before you merge two country files together.
Supplied Updates	When you apply a supplied data/pricing update, the country is backed up before the update commences.
Imports	Importing from previous versions of EzCoin will create a backup before starting.

Restoring from an Automated Backup



This window will appear when you choose one of the 4 Restore SDF File options. Each type of backup stores the SDF files in a unique subfolder under Backup in the EzCoin application path.

The list shows the file name, size, and date/time of modification. To restore a file, select it and then click on Restore. Note the checkbox option at the bottom. The restore can back up the current file to the TempDB folder. There is NO provision to restore a backup from this folder. If you need to restore anything from TempDB, you need to manually copy the file back to the DB folder.

Restoring from Outside EzCoin

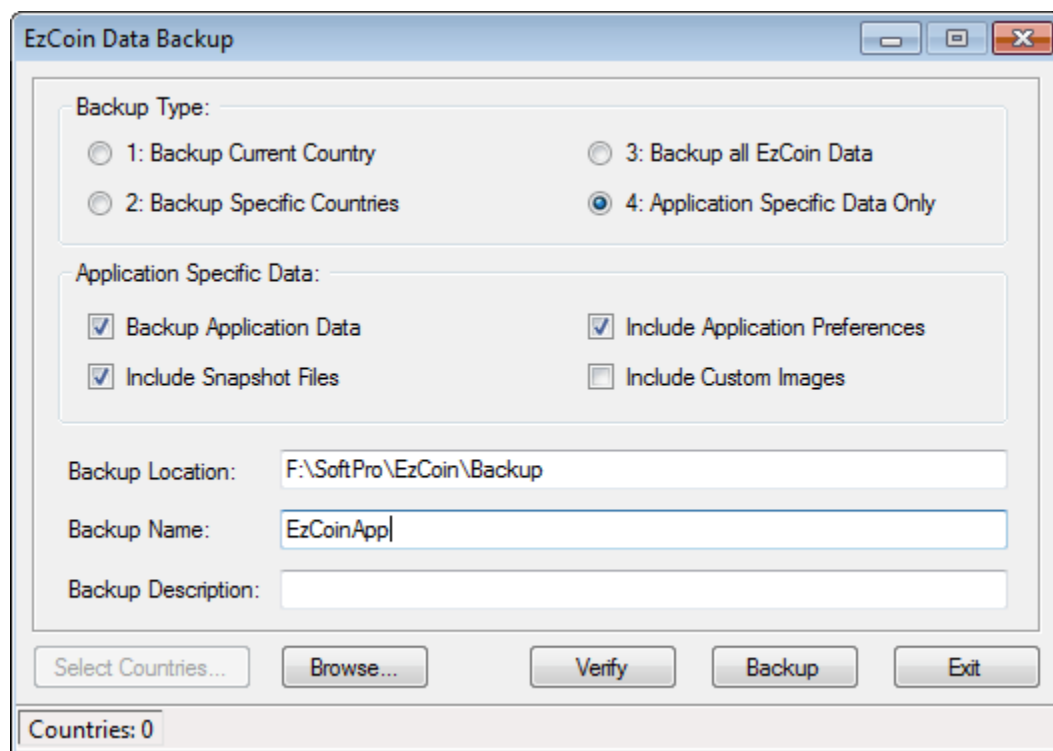
If you manually copy an SDF file into the DB folder outside of the application, the country file registration will not be accurate and grand totals reports will not be correct. If you ever do manual restorations like this, always perform a grand totals recalculation.

Removing Automatic Backup Files

If you wish to reclaim some disk space and no longer need specific backup files, select them from the list and click on the **Delete** button.

Archival Backups

This is the recommended method by which you should backup your data. This option is available as **Create Backup** from the country data file utilities submenu.



Backup Type

Current Country: This will create a backup of the current open country file only. Country backup archives contain only inventoried coin attribute data and any customization/configuration information.

Specific Countries: Use the **Select Countries** button to select one or more countries to backup.

All EzCoin Data: This option creates a backup of all non-country specific EzCoin data, which can include the following:

- Configuration settings for all dialog windows.
- General Preferences.
- Report Profiles.
- Default Search Conditions for Reports.
- Custom Search Export Files.
- Any files you have saved to the User folder in EzCoin.
- Custom Grade Group Filter Files.
- Navigation Lists.
- Custom Categories.

- Custom lists (PWL/PSL types, graders, buyers and sellers).
- Report Field Customizations.
- Snapshot Files.

Application Specific Data: This is a subset of the All Data option which is based on the checkbox options which appear in the backup window.

Application Specific Data

There are 3 types of application specific data, which can be selected when choosing this type of backup.

Application Data: Country registry, graders, PWL/PSL types, buyers and sellers, which are all contained in the EzCoin.sdf application configuration file.

Application Preferences: EzCoin general preferences are stored in a special file named EzUser.cdt. This file is always updated whenever you close the application. Check this option to include it in the backup.

Snapshot Files: Check this option to backup the contents of the Snapshots folder.

Custom Image Backups

The installation path of EzCoin contains a folder named Images. If you store custom image files under this folder, EzCoin can archive them to backup. The way image backups work is based on the type of backup. For open country or selected country backup types, only the image files associated with the country are included in the backup. For the other two backup types, the entire contents of the Images subfolder is backed up.

Backup Location, Name and Description

The default location to save the archive to is the Backup folder in the EzCoin installation path. Use the **Browse** button to set a different backup path. The backup name and description can be any text values of your choosing.

Backup Verify

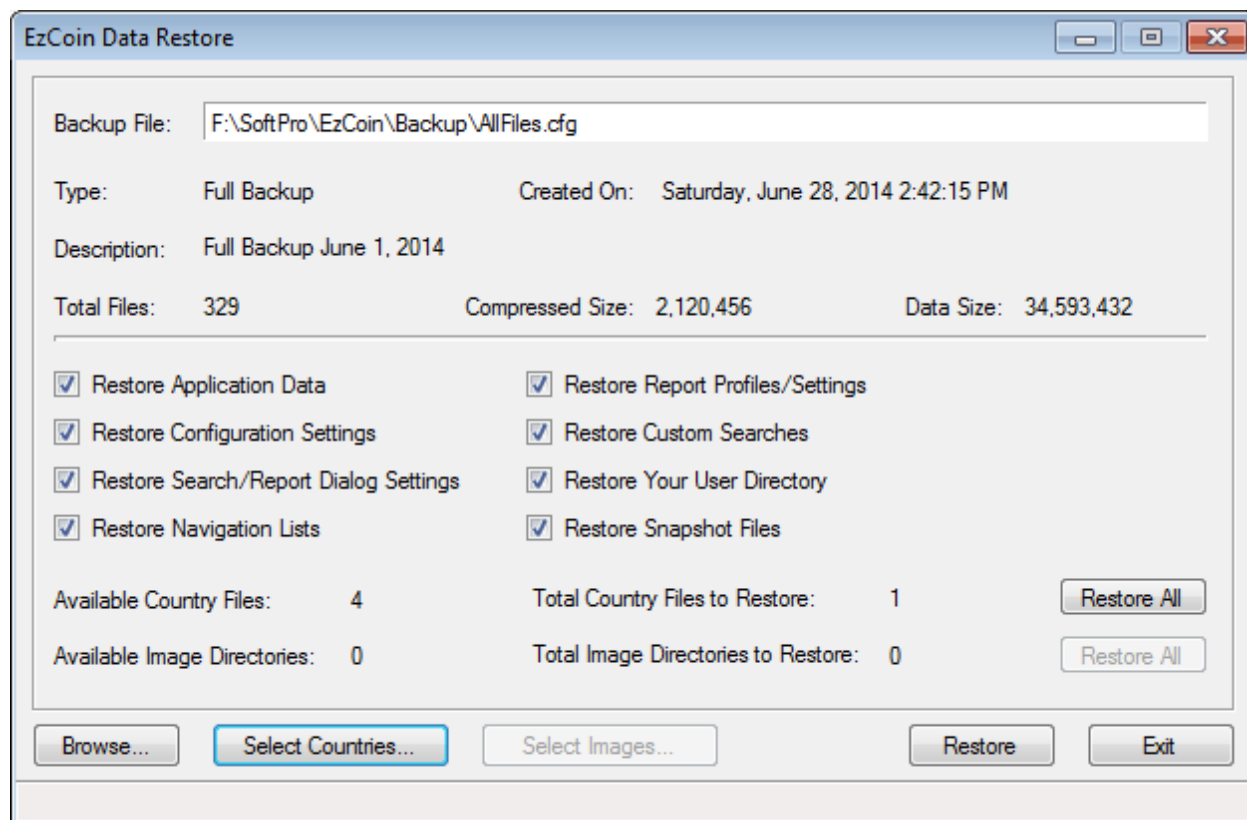
Use the **Verify** button to check the amount of data to backup, and to also ensure the files to be backed up are without error.

Backup File Format

All archive backups are saved as 2 files, one with a .CFG extension and the other with a .ZIP extension containing all of the backup data. You can't restore from backup without the .CFG file. You can open the .ZIP file, but you will not be able to restore any data to SDF-type files without using EzCoin. All of the other data files in the archive are stored as they exist in the EzCoin installation path and its various subfolders.

Restoring from Backup

Use the **Restore from Backup** option to restore all or part of a backup archive.



The restoration window allows you to selectively choose what data to restore from a given archive file.

Use the **Browse** button to select an archive configuration (.CFG) file. EzCoin will locate the associated .ZIP file and validate its contents before allowing you to choose the restoration options.

The top of the window is summary information for the contents of the archive, including its type, backup date, description, number of files and size.

The checkbox options allow you to select which items in the archive to restore. If items associated with a checkbox options are not actually in the archive file, the checkbox option will be grayed out.

If country or image files are contained in the archive, then the **Select Images** and **Select Countries** buttons will be enabled, allowing you to restore the country file data and/or the image files associated with the country. The **Restore All** buttons simply select every country or image file directory available in the archive.

Once you start a restoration, it can't be undone. If a restoration did not complete 100%, you can attempt the restoration again. EzCoin will resume the restoration from where it was halted.

Country file restorations are intelligent. If any error happens during a country file restoration, all changes made to it are rolled back and the file is left as it was before the restoration started. However, EzCoin data file restorations can't be rolled back. Once files are replaced from backup, they are changed for good.

IMPORTANT: If any Application settings have been restored from any backup, you will need to restart EzCoin in order for these changes to take effect.

Verification, Repair and Compaction

These options are available under the country data file utilities as **Verify**, **Repair**, and **Compact**. EzCoin uses Microsoft SQL database technology for the country file storage format, and as such, these utilities make use of built in features within this platform to handle the work. As a side effect of this, all 3 of these features can take several seconds or more to complete for a single country file, during which time EzCoin will not be able to respond to your input (i.e. you can't cancel the request).

All 3 options make use of the standard country list browser window.

- Verification will open selected country files and check them for any internal database errors. If any errors are detected, use the repair option to attempt to fix them, or make use of data backups to restore from. EzCoin contains extensive error handling and detection methods to keep your country files in good working condition, which should prevent errors from ever happening.
- The Repair option will attempt to fix a county file which can't be opened by EzCoin. The repair process is part of the Microsoft database product, so the effectiveness of the data repair can't be documented. If you still can't open the country file after a repair, or critical data has gone missing, or the repair fails, then you will have to restore from a backup archive.
- The Compact option will attempt to reclaim unused space within the SDF file. EzCoin has an automated compaction timer built into each country file, which can be configured using the general preferences.

Version Upgrades

Country files contain a highly optimized structure for storing coin records, configuration and customization options. If future updates to EzCoin involve additions of new features which require extending the country file structure, it will be necessary to ensure your existing files are kept up-to-date. Each country file has a build number, which is indicated in the country file list browser window. This is also shown in the properties window as the Data Version attribute, which is currently build version 2.0.

If the file structure changes, a new build number will be issued in the EzCoin application. When you attempt to open a country file which has an older build version (i.e. out-of-date), you must upgrade the country file to the latest build version.

The option **Update Version** in the country data file utilities submenu is provided for updating your country file's structure to the latest format.

Currently, version 2.0 is the only build format, and as such, the update option will simply inform you that the country file is up-to-date.

Note: EzCoin version 1 files can't be upgraded using this feature. You must export the version 1 data from the older version of EzCoin, and then import it with version 2.

Resetting a Country File

This option is intended only for restoring a country file to a pre-supplied un-initialized state. All customizations and inventoried coin information will be discarded, leaving the file the way it was when you first installed it from the EzSetup application. Be aware that you will not be able to get the data back once you reset the country.

EzCoin Cloud Backup & Restore

The Cloud backup feature is a new option available from the **Extras** menu. This type of backup stores the files remotely on a Cloud server. There are some differences between normal backups and Cloud backups which are summarized below. It's recommended that you continue to rely on your local backups as the primary method to safely store your collection data.

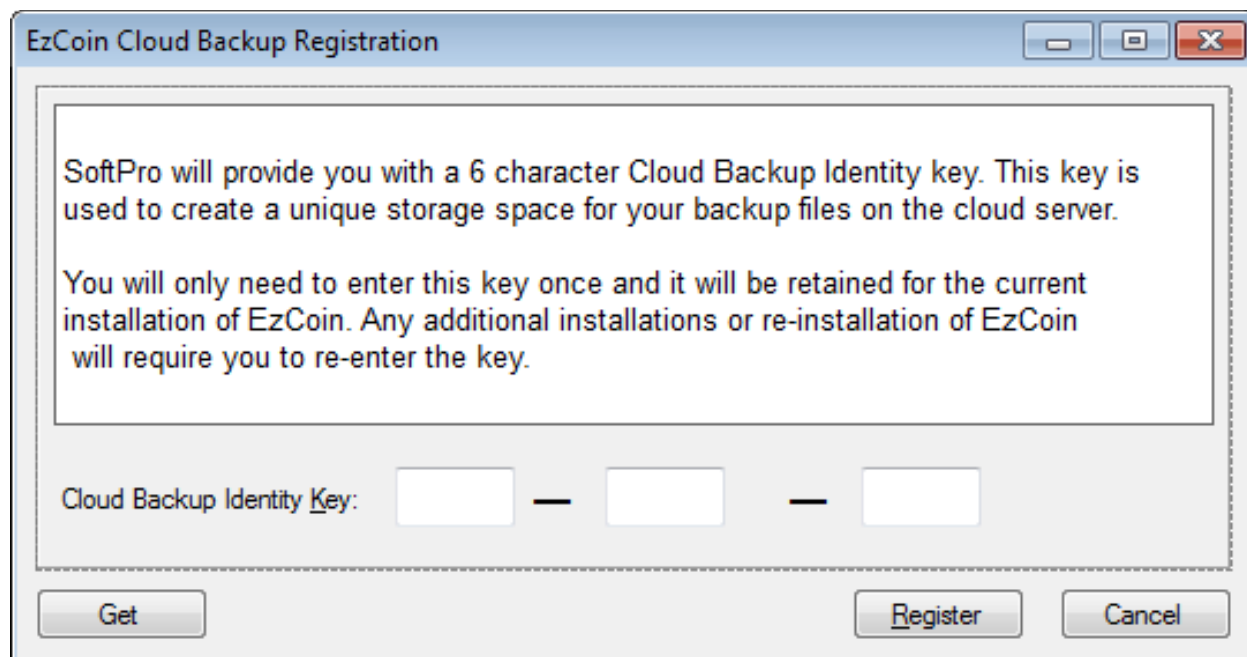
Cloud Backup vs. Local Backup

Given that the Cloud backups must be stored on a remote server shared with other EzCoin users, there are some limitations with this type of backup to ensure capacity on the server is sufficient, and that the backup process is streamlined for ease of use.

- Only 1 backup of a country file's data can be store on the Cloud server.
- Country backup files are segregated for efficiency in selective backups and restorations.
- No options are allowed to choose what to backup. Each country is backed up as complete inventoried data (excluding pre-supplied information which hasn't been customized).
- Application data is always transparently backed up with any country file. There are no options to choose what type of application data to backup. All data is backed up, with the exceptions listed below.
- Supplied & Custom images and snapshot files are not saved to the Cloud server. These items can be quite large, making file transfers slower and require significantly more capacity than the normal backup data.
- As data must be moved into and out of the Cloud server, backups will never be as fast as the local file backups in EzCoin. The speed of Cloud backups is dependent on your Internet connection speed, the Cloud provider's bandwidth, and your PC's performance level.

Registering for Cloud Backups

Under the **Cloud** submenu in **Extras**, choose the item **Register for Use**. This will show a dialog as follows.



The Cloud Identity key is a 6 character code used to reserve space on the Cloud server for your backups. The key and registration process is a one-time process - simply contact SoftPro to obtain a Cloud backup key. Then enter the key into the fields in this dialog to complete the registration. A minimal fee applies (\$10)

Re-Registration and Multiple Keys

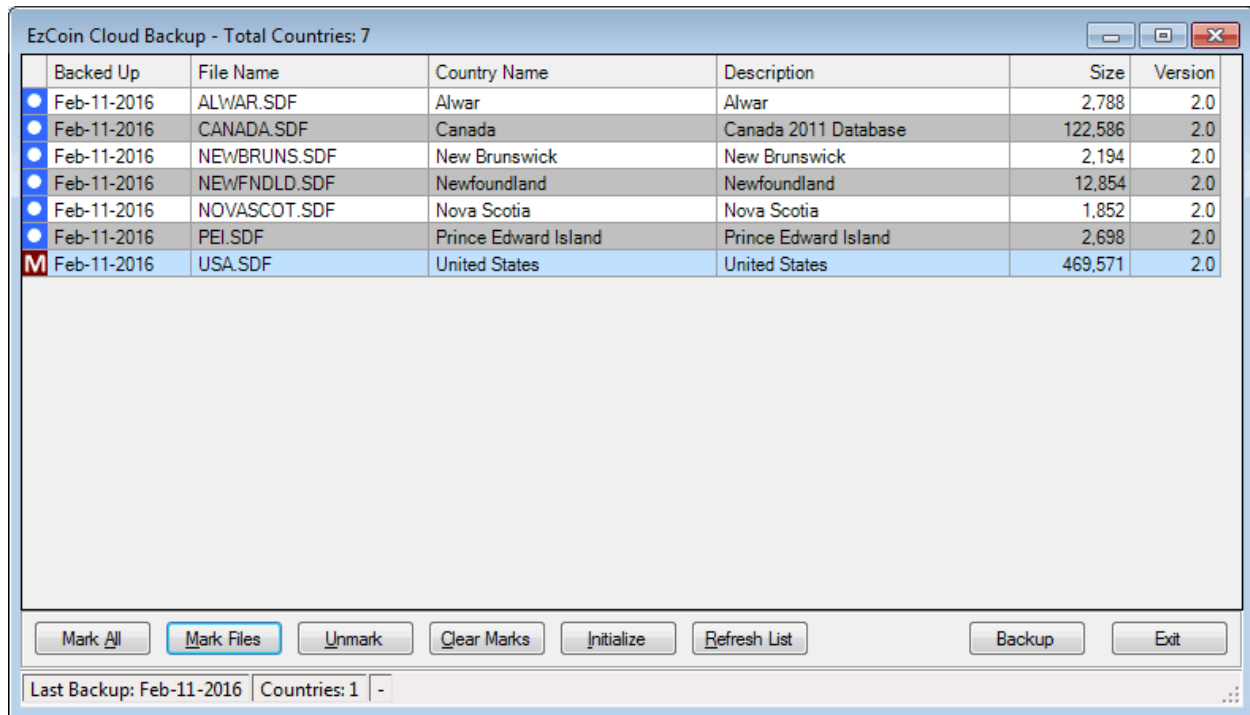
A Cloud key reserves one area on the server for your backups. The key is stored locally with the installation of EzCoin. If you install multiple copies of EzCoin, or re-install the application for any reason, you will need to re-register with the key again.

Important Note: You should never perform backups or restorations from 2 different installations of EzCoin at the same time, even if the application resides on different PCs. As there is only one set of backup files on the server, attempting to access them at the same time from multiple copies of EzCoin can result in errors or potentially lost backup data.

That being said, if you have multiple installations of EzCoin and prefer to keep separate Cloud backups, you can request an additional Cloud Identity key to use for a different copy of EzCoin. This allows you to keep the backups completely separate from each other. Note that SoftPro may restrict the number of additional keys which may be issued.

Cloud Backups

Choose the **Backup** option from the **Cloud** menu. This will present the following dialog window. Note that there will be a brief delay before this dialog appears, as EzCoin will need to check the server for backup contents and perform some basic integrity checks on the data to ensure everything is valid.



The list presented is identical to the one you see using the **Open With List** menu option to select country files to open. If you have hidden any countries from the list when using the Open With List option, then they will also be hidden in the Cloud backup list.

Each item in the list will have an icon displayed to the left, which can be any of the following:

	Blank means no backup exists on the cloud server.
	The entry is marked for backup. You will need to mark files for backup using the marking buttons at the bottom of the dialog.
	There is a valid backup file on the server.
	When a backup has been completed, the icon will change to the green checkmark to indicate success.

Selecting Backup Data

To backup just the application data, don't mark any country files and click on the **Backup** button. This will transfer the application data to the Cloud server.

To backup countries, select the ones you wish to backup, and use the **Mark Files** button. To backup all countries, use the **Mark All** button.

Initialize and Refresh

The Initialize and Refresh buttons serve the same purpose as in the Open With List dialog.

The **Initialize** button will apply a first-time initialization to all selected countries. Note that opening any country file in the main EzCoin window will also perform this function automatically for you. The Initialize button is primarily intended for those users with many country files for which initialization can be accommodate for all files with a single click. Note that initialization for dozens of countries can take several minutes to complete.

The **Refresh List** button will check all country files for description and version details if they haven't been opened yet.

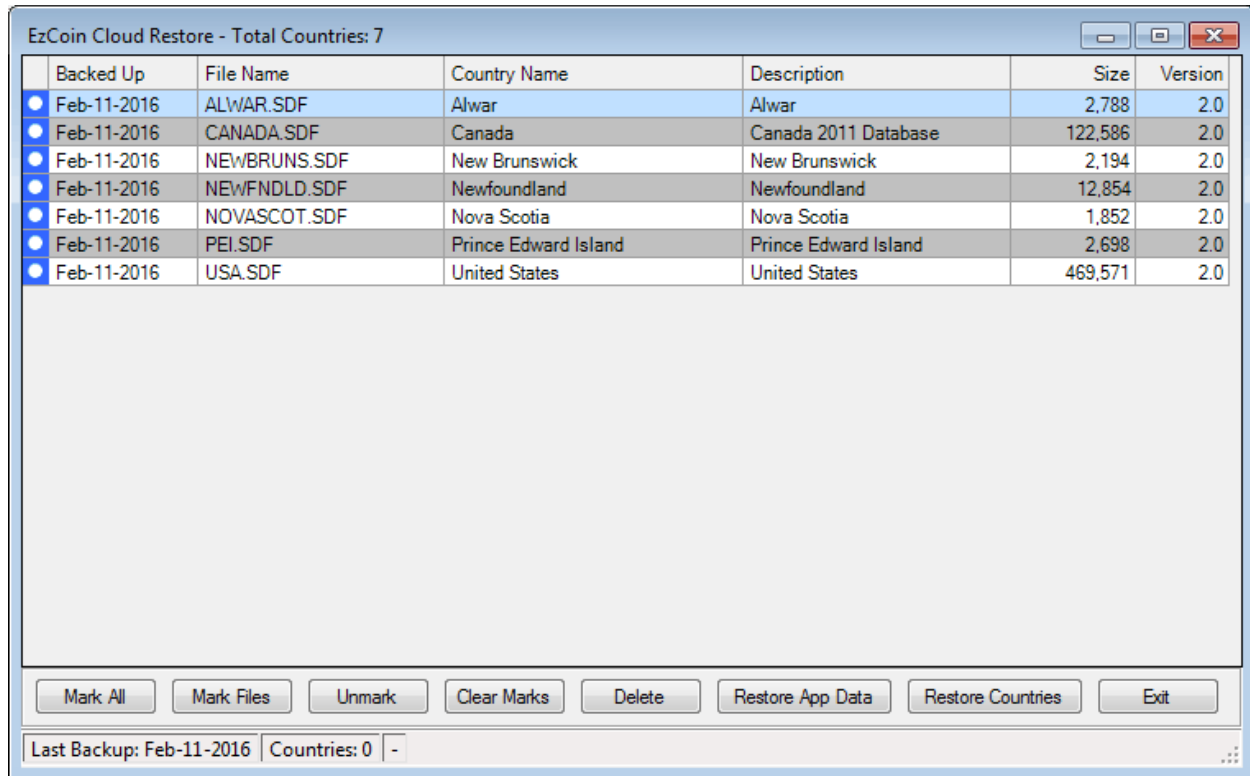
Starting a Backup

When you are ready to start the backup, click on the Backup button. As each backup is made to the server, the icon status will change to a green checkmark.

Note that the version and file size information are not updated in the dialog until a backup resides on the server.

Cloud Restoration

Choose the **Restore** option from the **Cloud** menu. This will present the following dialog window. As with the backup option, there will be a brief delay before this dialog appears while EzCoin checks the server for backup contents.



The cloud restoration dialog shows the same basic list of country files, with one notable difference: Only files residing on the Cloud server are displayed.

There are additional icon states for the restoration list:

	The entry is marked for backup. You will need to mark files for restoration.
	There is a valid backup file on the server AND there is also a local matching file with the same country identity.
	The backup file on the server has a country identity that doesn't match the local country installed in EzCoin. You will not be able to restore from this backup unless you rename the local country file to something else.
	The restore was completed from the server without error. This only appears once you click on the Restore button.
	A server backup exists but no local file with the same name exists in the EzCoin application folder. See the section below to understand how restoration works without a matching country file in EzCoin.

Restoring Without a Matching Country File

Similar to local backups in EzCoin, the backup information only contains inventoried records, customizations made to pre-supplied data, or any coin attributes not associated with pre-supplied information.

When restoring custom countries from backup, there is no difference between restoring to a country file which already exists in EzCoin, or for when a file doesn't exist, as the backup file contains 100% of the country data.

For pre-supplied countries from SoftPro, pre-supplied pricing, image links, and other pre-supplied coin attributes are not backed up, unless you have changed their pre-supplied values to create customized records.

If you restore a local or Cloud backup file to EzCoin and the country isn't already installed, you will end up with a custom country restoration without pre-supplied data (non-inventoried coin records will not exist in the restored file).

For this reason, always ensure you have the pre-supplied country files re-installed before performing and restoration. If for some reason, you don't do this, then you will need to merge the pre-supplied data into the restored file from a copy of the pre-supplied country file. If you run into this scenario and are unsure of how to proceed, contact SoftPro for assistance.

Starting a Restoration

There are two buttons available for restoration. **Restore App Data** will only restore application backup data - no countries are restored. **Restore Countries** will always restore application data first, followed by the countries which are marked.

As each restoration is made from the server, the icon status will change to a green checkmark.

Resuming Backups or Restorations

Since Cloud backups require an Internet connection, there is always a remote possibility that a connection can be dropped during a file backup or restoration. EzCoin has auto-recovery capabilities to restore any prior backup of country or application data if the backup session was ended unexpectedly.

For restorations, a lost connection will result in no lost data, but you will be required to manually select the files to restore which were not completed.

EzCoin maintains a log file for backups and restorations, which can be found in the application's **User** folder as file names **CloudRestore.log** and **CloudBackup.log**. These log files are plain text format and indicate the status of each file backed up or restored, and any error conditions that may have been encountered.

Assigning a Country to Import Pre-Supplied Data

If you attempt to restore from a country which is not already in EzCoin and the backup references pre-supplied coin information from SoftPro, you will be provided a dialog window to assign pre-supplied information from an alternate installed country.

Responsibility for Data

By using SoftPro's Cloud Backup module, You acknowledge and agree to take full and sole responsibility for all files and data transferred, and to maintain all appropriate separate local backup of files and data stored on our cloud servers. SoftPro will not be responsible for any data loss of your uploaded data from your account under any circumstances.

SoftPro does not assume any liability whatsoever for actual, direct or indirect losses or for losses incurred due to the unavailability of use or data losses in connection with the use of SoftPro's Cloud Backup services.

It is good backup practice to have multiple backups of your data. SoftPro suggests a 3 tier backup solution.

1. Backup to your hard drive
2. Backup to a physical external drive or Flash/USB Drive
3. Cloud Backup

Should any one fail for any reason, you will have alternate methods of data recovery.

Cloud backups & What to Use them For

Cloud backups give you extreme flexibility for restoring data across several devices. One of the most important is the ability to Synchronize laptops/tablets & PC's. Imagine being on the road or travelling & you forgot to bring your EzCoin backup on your flash drive. With Cloud backups, you can restore your cloud data onto your laptop & enter your coins or purchases. Then do a cloud backup when you are done. When you get home, you can do a Cloud Restore to your desktop & continue where you left off. With cloud backups, your data is available to you anywhere you have an internet connection. Your data is extremely secure in our cloud service. All EzCoin cloud data uses AES-256 bit encryption. The cloud backup is intended to be an extra layer of data protection for your data. You should still continue to do local EzCoin backups to your hard drive & an external drive/flash drive.

Restoring Backups Without Installed Countries

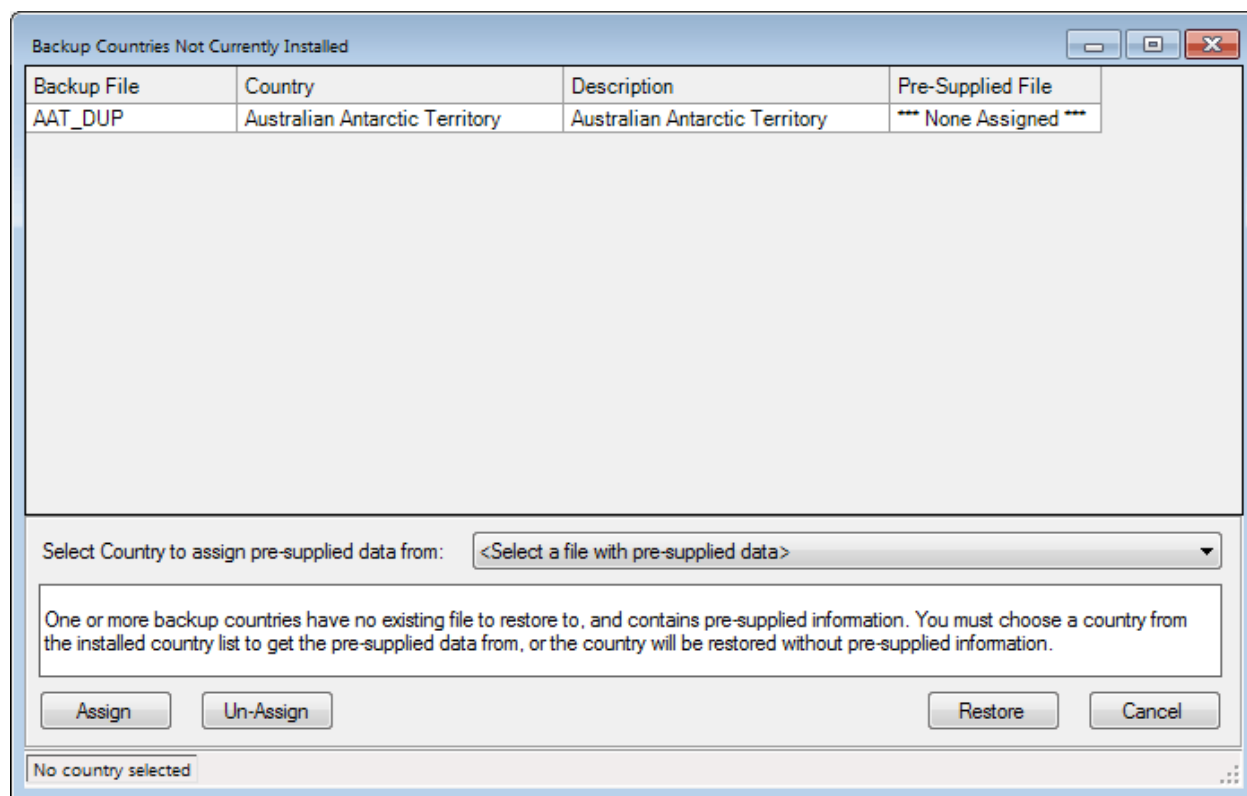
When restoring from either local or Cloud backup files, EzCoin will check the countries which are being restored to see if they have references to pre-supplied coin data from SoftPro.

Backup archives only contain your customizations to a country file, plus any inventoried coin data not provided by SoftPro. When restorations are made from a backup, EzCoin will look for the country file with the same name to see if it's already installed. If the country file is present, EzCoin will merge pre-supplied information in the installed version and replace all of your custom/inventoried information from the backup archive.

Since the backup archive doesn't contain the pre-supplied coin data, it's important to have the ability to import that information from a compatible country which is already installed.

EzCoin will provide you with a special dialog window to assign an installed country with pre-supplied coin information to use as the source when restoring a country from backup.

An example of this dialog window is shown below.



For a backup file to appear in the list, it must meet the following conditions:

1. The backup country must not be custom. If the country was not associated with pre-supplied data from SoftPro at the time of backup, it will not appear.
2. The country is not already installed with the same file name in the **DB** subfolder of the EzCoin application path.

Assigning a Country to Import Pre-Supplied Data

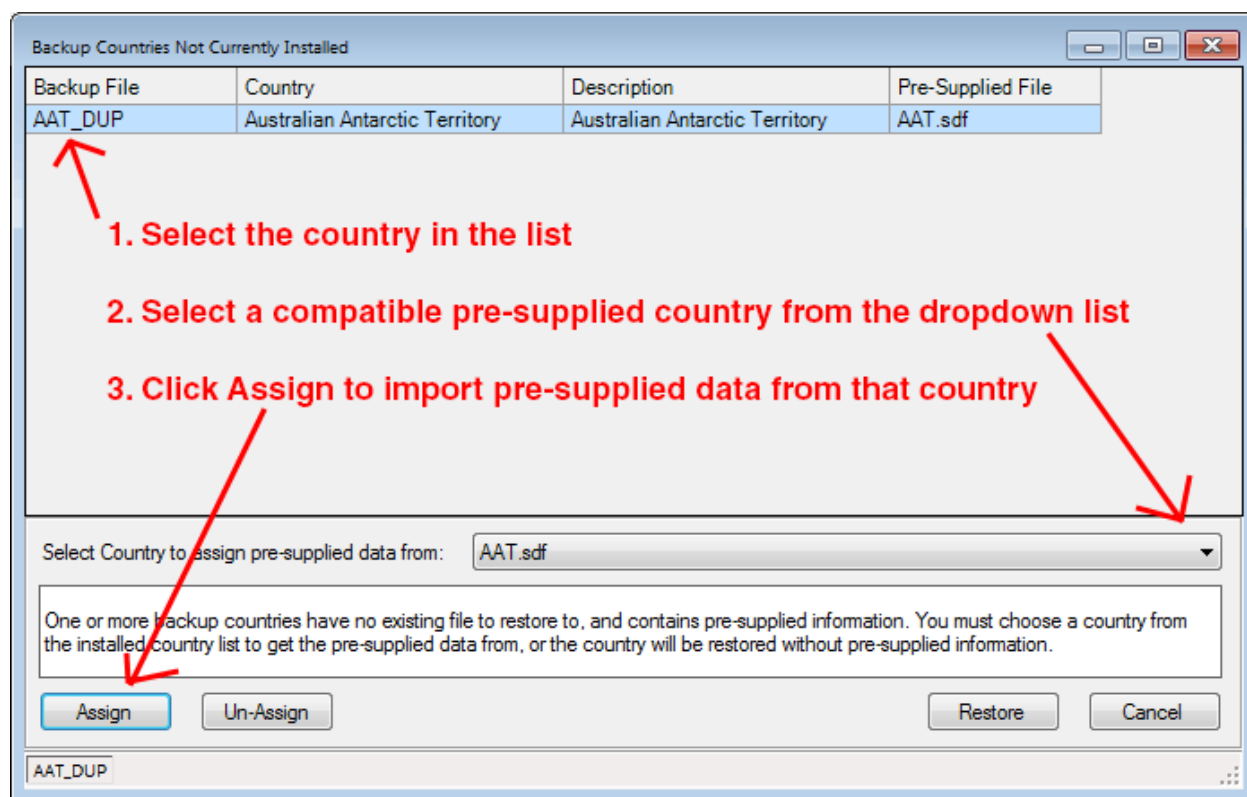
To assign pre-supplied coin information to a backup country, follow these steps.

1. Select the country from the list.
2. Select a compatible country from the drop down list.
3. Click on the **Assign** button. Use the **Un-Assign** button to remove the pre-supplied association.

A compatible country is one which is based on the same country of origin, and contains pre-supplied coin information from SoftPro. For example, you can choose USA for any backup country which is based on the country United States, as long as the installed version of United States contains pre-supplied information.

You may choose to restore any country without pre-supplied information. However, a warning will be given asking you confirm your decision. In this case, the country will be restore as a custom format, and no pre-supplied coin data will exist after the restoration is completed.

An example of a pre-supplied assignment is shown below.

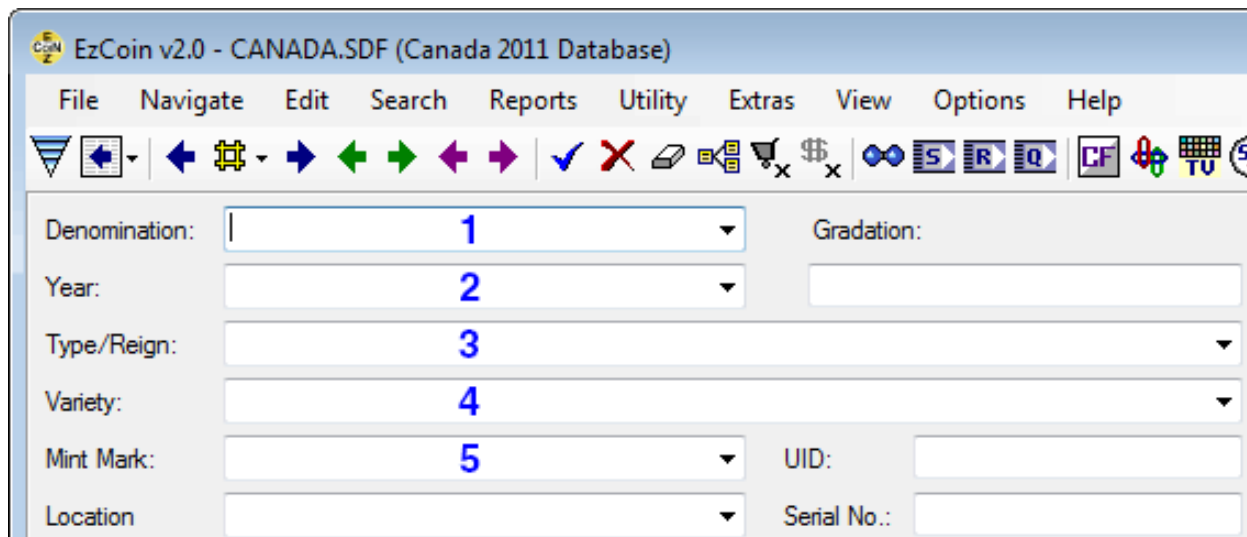


Navigation

Finding Coin Records

Primary Key Lookup

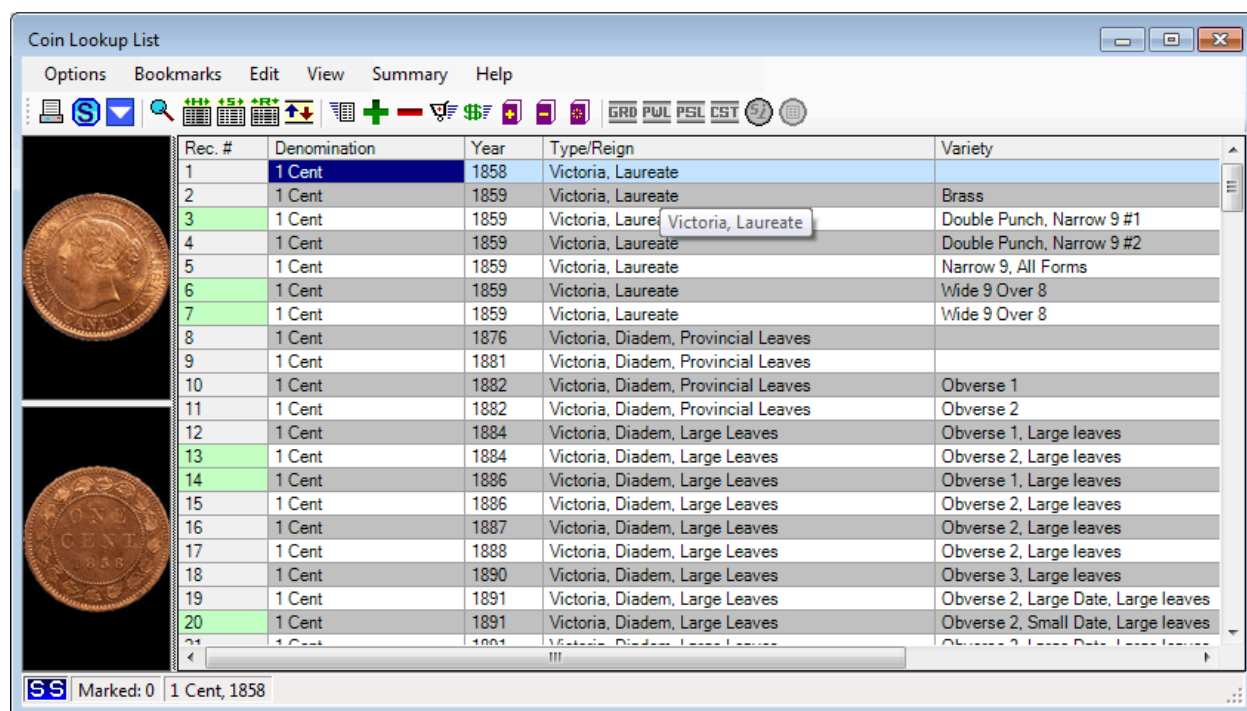
The easiest way to find a coin record is to enter values into one or more of the 5 key fields in the top left section of the EzCoin main window and press the ENTER key within one of those fields. Dropdown lists are provided for each of these fields.



The screenshot shows the EzCoin v2.0 - CANADA.SDF (Canada 2011 Database) main window. The window has a menu bar with the following items: File, Navigate, Edit, Search, Reports, Utility, Extras, View, Options, and Help. Below the menu bar is a toolbar with various icons. The main area of the window contains several input fields for searching. The fields are: Denomination (dropdown menu with '1' selected), Year (dropdown menu with '2' selected), Type/Reign (dropdown menu with '3' selected), Variety (dropdown menu with '4' selected), Mint Mark (dropdown menu with '5' selected), Gradation (text field), UID (text field), and Serial No. (text field). The fields are numbered 1 through 5 in blue text.

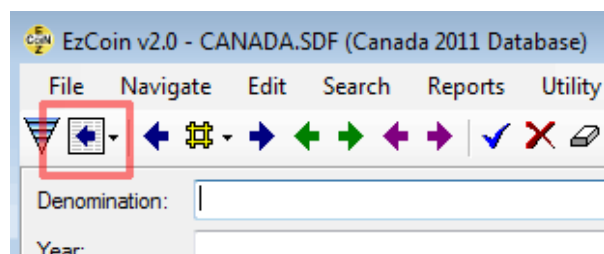
The 5 key fields are Denomination, Year, Type/Reign, Variety, and Mint Mark. A coin record's uniqueness is determined by the combination of these 5 fields. You are not permitted to use partial values for any of these fields (Power Search can be used for that type of lookup).

If multiple matching records are detected based on the 5 fields, a pick list window will appear using the standard EzCoin Report Viewer window:



You can simply double click any coin entry in the list to select it into the main EzCoin window.

Note that the most recent 8 lookups using this window can be recalled quickly using the popup menu items from the main EzCoin toolbar, as indicated below.



Coin Not Found and Custom Varieties

If a coin can't be found based on the 5 key fields, you will be informed that the coin record can't be found. If you wish to create a custom variety from these 5 key fields, click on the button with the Blue checkmark to add this variety to your collection.

Drill Down Mode

This feature can be enabled by holding down the **Ctrl** key while pressing ENTER in any of the 5 key fields of the main EzCoin window. You don't have to populate any of these 5 fields to start a drill down search. A window will be displayed with filtering options:

EzCoin Record Drill Down Filter

Denomination: **Total Matches: 378**

Year: ☐ Sort by Year

Type/Reign:

Variety:

Mint Mark:

Denomination	Year	Type/Reign	Va
25 Cents	1870	Victoria	Na
25 Cents	1870	Victoria	Wi
25 Cents	1871	Victoria	
25 Cents	1871	Victoria	
25 Cents	1872	Victoria	
25 Cents	1874	Victoria	
25 Cents	1875	Victoria	
25 Cents	1880	Victoria	Na
25 Cents	1880	Victoria	Na

For any combination of the 5 key fields shown, all possible matching records will be shown. When you have a coin record selected, click on the **Choose** button (or double click the record in the data grid) and it will be displayed in the main EzCoin window.

As you select a value from one of the 5 drop downs, the other 4 fields will automatically be filtered to show all possible coin combinations. The selected field will be locked from being changed - you are basically forming an "anchor" point, a field which determines the available values for the remaining fields.

Once you select a value from one of the remaining fields, it too will be locked down and further filter fields. For example:

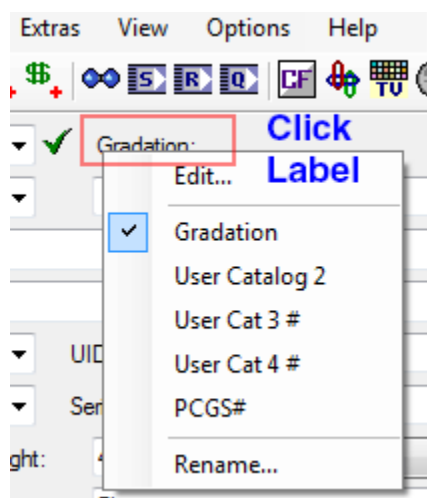
- Choose a year. It will be the anchor for the remaining 4 fields. The dropdown values will show all possible values for coins based on the year chosen.
- Choose a variety. It will be the anchor point for the remaining 3 fields, which will further be filtered to show a smaller number of possible coins.
- Once you have chosen a unique combination of the 5 fields, the match count will sit at 1.

Click on the **Reset** button to clear all 5 key fields and start a new drilldown filter. You are free to enter partial text string in any field, which can be completed by clicking the down arrow button on the right of the associate drop down list.

Check the **Sort by Year** option to display matching records in year order. Otherwise they are displayed in denomination order.

Alternate Catalog ID Lookup

To the right of the Denomination field is an input field with an alternate catalog ID label above it. There are up to 4 pre-supplied alternate numbering systems for a country file and up to 4 user catalog ID numbering formats available.

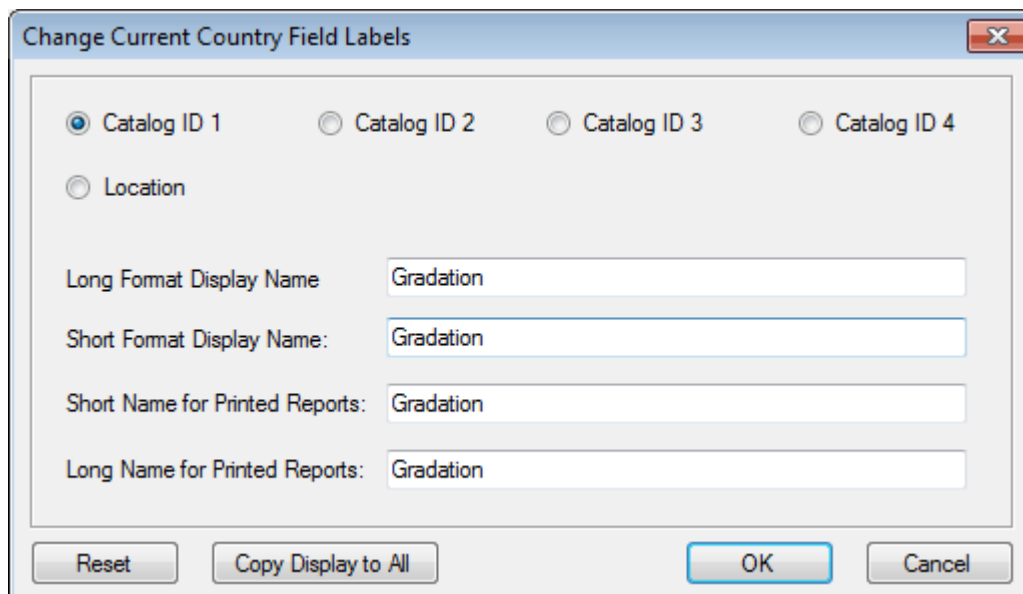


Not every pre-supplied country issued by SoftPro will have alternate numbering systems. If one is available (such as PCGS for USA), it will appear when you left click on the label above the input field.

The first 2 catalog ID values can come from EzCoin version 1 import files. The 3rd and 4th user values are new to EzCoin version 2. Pre-supplied catalog ID values will appear below the user versions in the popup menu.

To perform a lookup on an alternate catalog ID value, make sure you have selected the correct type from the popup menu, as only one numbering system can be active in the main EzCoin window.

You can rename the labels for the 4 user catalog ID numbering formats by choosing the **Rename** option from the popup menu. This will present the same dialog as the *Change County Field Labels* item from the EzCoin **Options** menu.

A dialog box titled "Change Current Country Field Labels" with a close button (X) in the top right corner. It contains five radio buttons: "Catalog ID 1" (selected), "Catalog ID 2", "Catalog ID 3", "Catalog ID 4", and "Location". Below the radio buttons are four text input fields, each with the label "Gradation": "Long Format Display Name", "Short Format Display Name:", "Short Name for Printed Reports:", and "Long Name for Printed Reports:". At the bottom are four buttons: "Reset", "Copy Display to All", "OK", and "Cancel".

Change Current Country Field Labels

☒ Catalog ID 1 ☐ Catalog ID 2 ☐ Catalog ID 3 ☐ Catalog ID 4

☐ Location

Long Format Display Name: Gradation

Short Format Display Name: Gradation

Short Name for Printed Reports: Gradation

Long Name for Printed Reports: Gradation

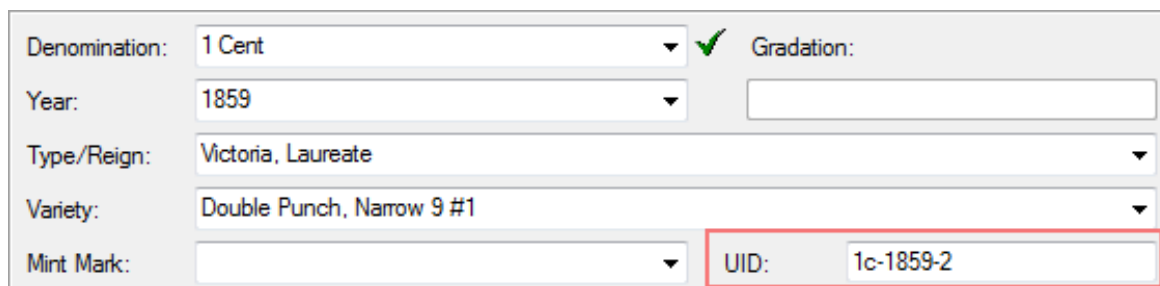
Reset Copy Display to All OK Cancel

Searches and Reports

Any of the search and reporting options in EzCoin provide comprehensive search conditions to locate coin records easily. Power Search is perhaps the best choice to search for coin record with unique properties, as it can partially match on almost any field in a coin record.

UID (Coin Unique Identifier) Lookup

To the right of the Mint Mark field is an input field with the label of **UID**. The unique ID value is assigned for all coin records for pre-supplied coin records. It's an optional field for any custom country files or custom variety coin records.

A form for entering coin record details. It includes fields for Denomination (1 Cent), Year (1859), Type/Reign (Victoria, Laureate), Variety (Double Punch, Narrow 9 #1), and Mint Mark. To the right of the Mint Mark field is a field labeled "UID:" containing the value "1c-1859-2". A red rectangle highlights the "UID:" label and its value.

Denomination: 1 Cent ✓ Gradation:

Year: 1859

Type/Reign: Victoria, Laureate

Variety: Double Punch, Narrow 9 #1

Mint Mark: UID: 1c-1859-2

A UID value is a shorthand notation for a coin record. You are free to assign any value to the UID for a custom country as a cross reference lookup, and for any custom variety coins. This is not a mandatory field and may not be present for all coin records.

When performing a UID lookup, enter the complete UID value or just a portion of it (i.e. **1c** is acceptable) and press the ENTER key while still positioned in the UID

field. If more than one matching record is found, a list of matching records will be presented from which you can choose from.

UID and Alternate ID Uniqueness

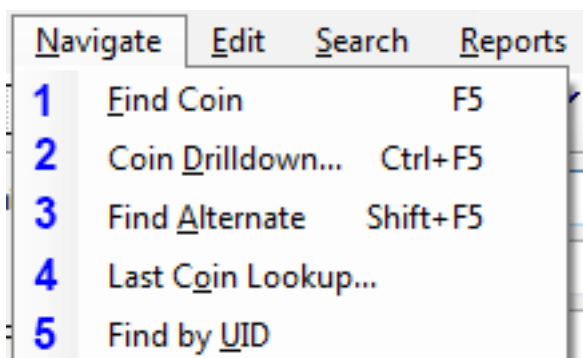
UID and alternate ID values are unique but not mandatory. Each coin record based on the combination of the 5 key fields (Denomination, Year, Type/Reign, Variety, and Mint Mark) can be associated with only unique UID and alternate ID values.

For example, 1c-1796 can't be used for 2 different combinations of the 5 key fields.

This behavior is different than EzCoin version 1, which basically allowed you to put anything into UID and alternate ID fields, which in turn could potentially cause issues with reporting and navigation of coin records.

Menu Shortcuts

All of the find options are also available from the **Navigate** menu and may also have shortcut keys associated with them.



Stepping to Next and Previous Records

There are 3 pairs of colored arrows in the EzCoin toolbar. The color determines how you can step forwards and backwards through the coin records.

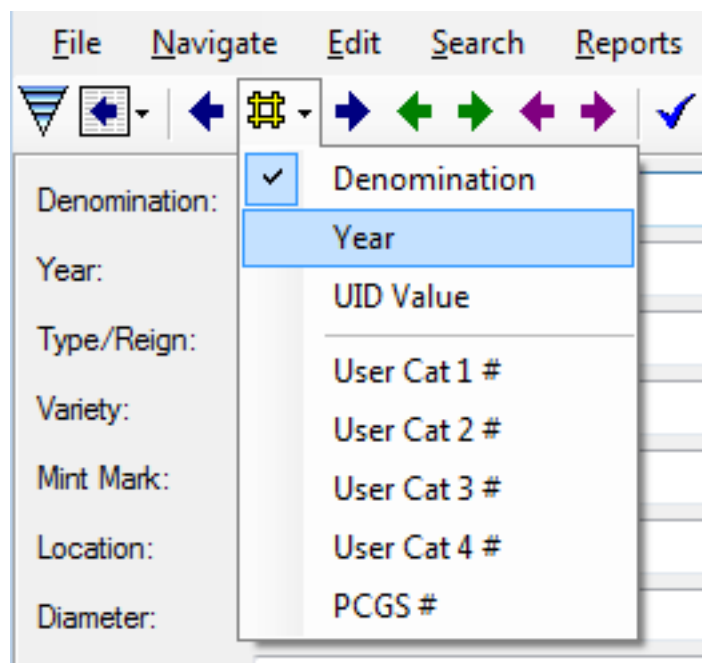
Blue	Step through all coin records (pre-supplied and inventoried) using the current stepping sort order. The # icon between these 2 arrows defines the stepping sort method (see below).
Green	Step through coin records which are inventoried. Any non-inventoried pre-supplied records are skipped. For custom country files, the blue

	and green arrow buttons perform the same.
Violet	Step through records in the active Navigation List. Navigation lists can be created from most searches and reports, bookmarks, coin lists or tag lists.

If you hold down the CTRL key while clicking on any arrow button, you will automatically step to the first or last record based on the associated stepping method.

Setting the Stepping Method

Click on the # icon between the 2 blue arrows to set the stepping method which will be used when you navigate using the blue or green arrow buttons.



If SoftPro has provided pre-supplied alternate numbering formats for a country file, they will also appear in this popup menu. The above example shows the 7 available stepping types which are always available for every country file plus PCGS for USA.

Denomination is the default stepping method, and will display all records present in the country file, in denomination, year order.

Year will display all records in year, denomination order.

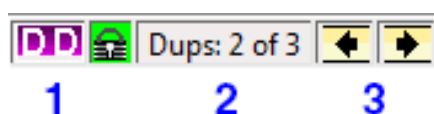
UID will display records in unique identifier order. Any coin records which have no UID value will be skipped over.

The **User Catalog ID** options are for your alternate catalog numbering systems. If you have no alternate numbering system attached to the selected numbering format for a coin record, then the record will be skipped over.

Note that violet arrow buttons have only one fixed stepping method. The navigation list stepping is based on the sort order of the navigation list, which is usually the same order as a report or search which was used to create it.

Stepping & Duplicate Coin Records

When coins are duplicated on the same key fields (Denomination, Year, Type/Reign, Variety, and Mint Mark), you will notice 3 things at the bottom of the EzCoin window in the status bar.



1. The coin status icon changes to the violet “DD” symbol.
2. The current and total number of duplicate records for the current coin record is shown in the status bar.
3. The 2 yellow arrow icons are used to step back and forth between the duplicate records.

In addition to using the yellow arrows for stepping between records, the blue and green arrows in the toolbar will take duplicate records into account. If you want to ignore duplicate record stepping mode on the blue and green arrows, a general preference option can be used to disable this default behavior (*Include duplicates when using navigation stepping methods*).

Automatic Back-stepping when Deleting Records

A general preference option (*Step to previous supplied on inventory deletions*) will cause EzCoin to step backwards to the previous pre-supplied coin record when you delete a record from your inventory. This is enabled by default.

Stepping with Pending Coin Changes

By default, EzCoin will warn you when you attempt to step away from the current coin record if you have made any changes to the data. This warning can be disabled from the EzCoin general preferences.

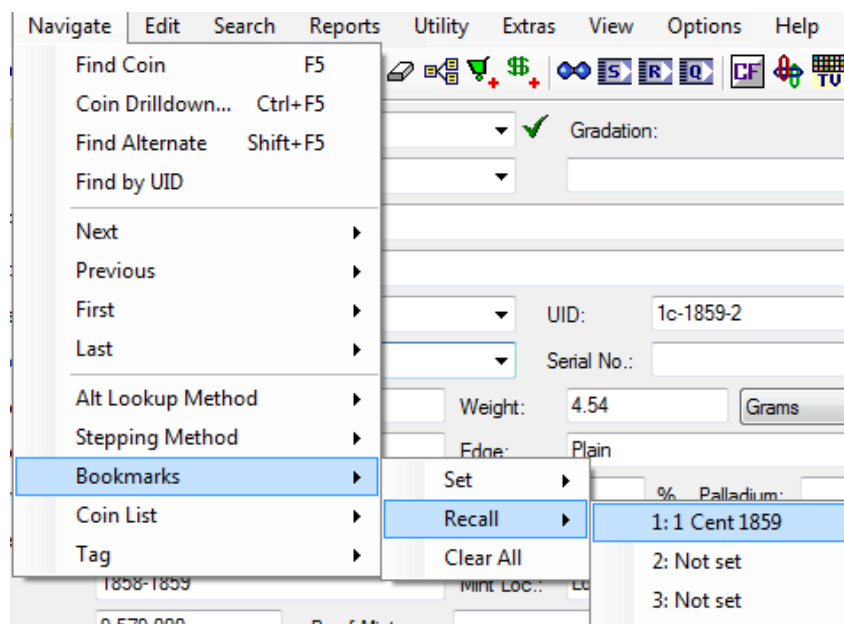
Navigation Menu Options for Coin Stepping

All of the navigation options in EzCoin can be found under the EzCoin main **Navigate** menu. Default shortcut keys have been defined for the most frequently used options. You can customize the keyboard shortcuts for other options as needed, or attach menu options to a customizable tool button window which extends the default EzCoin toolbar.

Menu Item	Shortcut	Description
Next Supplied Coin	Ctrl + Up	Equivalent to clicking the right blue arrow.
Next Inventoried Coin	Ctrl + Right	Equivalent to clicking the right green arrow.
Next Coin in List	Ctrl + Page Up	Equivalent to clicking the right violet arrow.
Next Duplicate		Equivalent to clicking the right yellow arrow icon in the status bar.
Previous Supplied Coin	Ctrl + Down	Equivalent to clicking the left blue arrow.
Previous Inventoried Coin	Ctrl + Left	Equivalent to clicking the left green arrow.
Previous Coin in List	Ctrl + Page Down	Equivalent to clicking the left violet arrow.
Previous Duplicate		Equivalent to clicking the left yellow arrow icon in the status bar.
First Supplied Coin		Equivalent to clicking the left blue arrow while holding down CTRL.
First Inventoried Coin		Equivalent to clicking the left green arrow while holding down CTRL.
First Coin in List		Equivalent to clicking the left violet arrow while holding down CTRL.
Last Supplied Coin		Equivalent to clicking the right blue arrow while holding down CTRL.
Last Inventoried Coin		Equivalent to clicking the right green arrow while holding down CTRL.
Last Coin in List		Equivalent to clicking the right violet arrow while holding down CTRL.
Lookup Method		Equivalent to clicking the label to the left of the Alternate Catalog ID text input field.
Stepping Method		Equivalent to clicking the # icon between in the 2 blue arrows in the toolbar.

Setting Bookmarks on Coin Records

EzCoin will allow you to bookmark up to 8 coin records per country file. Bookmarks are accessed from the **Navigate** menu under the bookmark submenus.



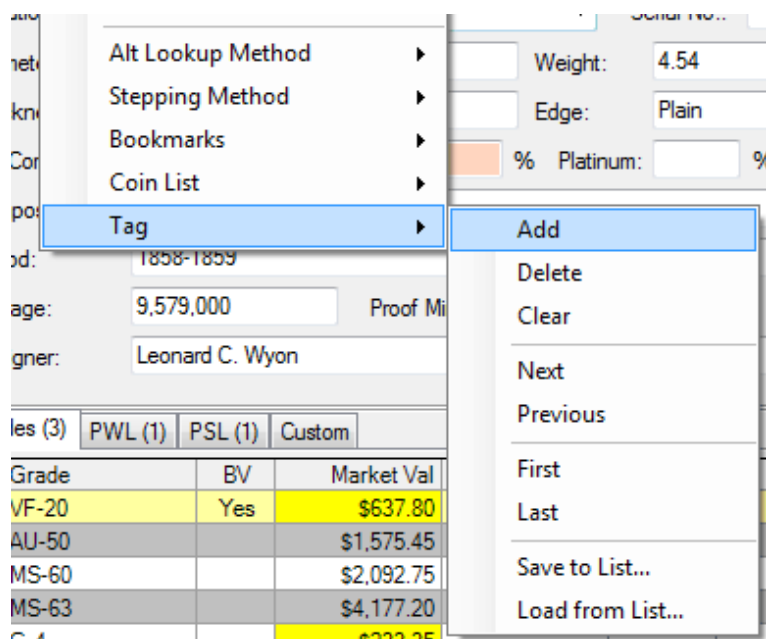
There is one submenu for setting the bookmarks, and one for recalling them. Use the Clear All option to remove all current bookmarks. If you expect to make frequent use of the bookmark option, you should assign the bookmark options to the shortcut button window or attach shortcut keys.

Bookmarks are saved to the country file, and therefore will be retained even when you close EzCoin.

If you need to make use of more extensive bookmarking on coin records, consider using tags, coin lists or navigation lists. All of these methods require you to export the lists to file if you intend to retain them after closing EzCoin.

Tagging Coin Records

The Tag option under the Navigate menu provides you with an easy method to create record lists which have an unlimited size. A tag list can be transferred to a navigation list, which can in turn be applied to an ad-hoc report or displayed in the thumbnail viewer.



A tag list is identical to a navigation list, and is in fact the only way outside of searches and reports to build a navigation list. The tag list was designed to allow you to interactively create a navigation list one coin record at a time.

No default shortcut keys or toolbar buttons are assigned to tag list functions. If you intend to make frequent use of the tag list feature, you should create shortcut buttons or keys for easier accessibility.

Adding and Removing Records

Use the **Add** option to add the current coin record displayed in the main EzCoin window to the end of the current tag list. Use the **Delete** option to remove the current record from the list. Deletions will have no effect if the current record isn't already part of the list.

Navigation of the Tag List

Use the **Next**, **Previous**, **First** and **Last** options to step through the tag list.

Loading, Saving and Transferring Lists

The **Load from List** and **Save to List** options recall and store tag lists in the navigation list file format. As such, the tag and navigation lists are 100%

interchangeable allowing you to run reports and thumbnail views from tagged records.

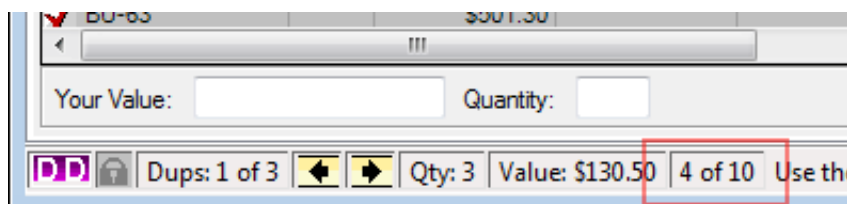
The Coin List viewer works with navigation and tag lists as well. You can transfer the tag list to the coin list, or a navigation list to a coin list. Refer to the Coin List help section for more details.

Navigation Lists

Navigation lists are collections of coin records for a given country file. A list contains a collection of coin records based on the 5 key fields (Denomination, Year, Type/Reign, Variety, and Mint Mark), and a duplicate coin status value.

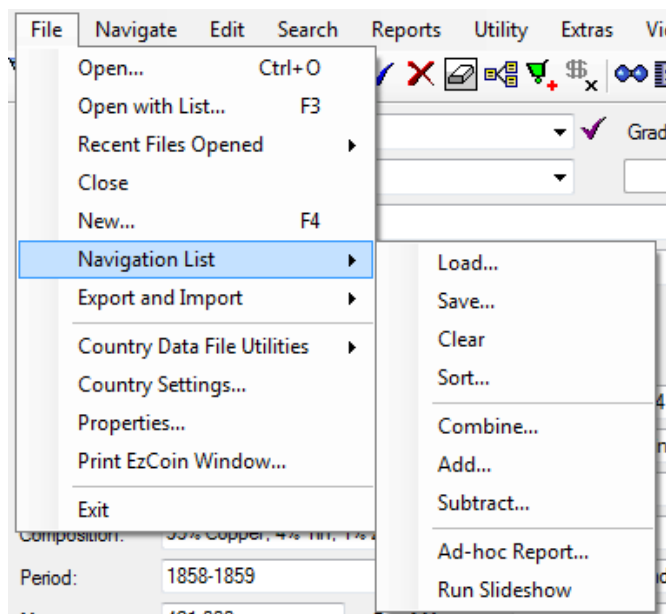
The primary source for a navigation list is from a search or report. All EzCoin searches and reports create an internal navigation list file which in turn is used by the report viewer to display the search results. The main EzCoin window supports an *active* navigation list, which can be assigned from any search or report, or you can create the list interactively using the coin list viewer or options under the Tag menu.

When a navigation list is active, you can use the violet arrow buttons to step through the list. The status bar at the bottom of the EzCoin window will indicate an active list when the list status is displayed, showing the current and total records in the list.



Loading and Saving Lists

An active list can be loaded or saved using the **Navigation List** options under the **File** menu.

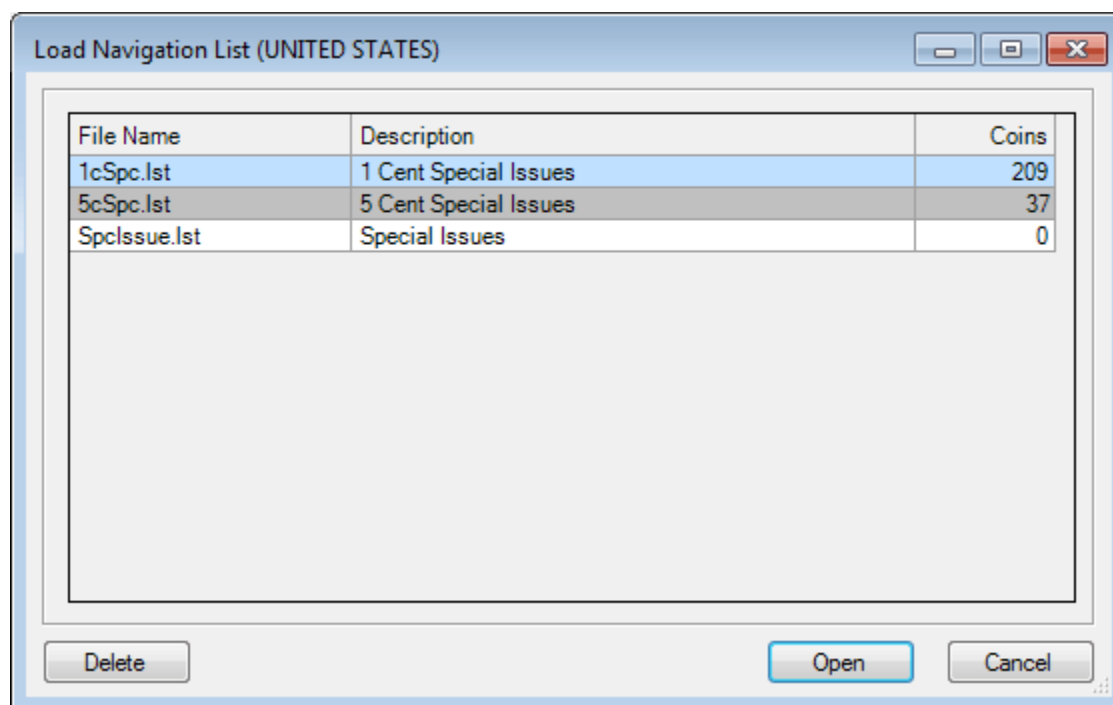


A list can't be loaded except for the country file for which it was saved from. For example, a list file for Canada is not compatible with a USA country file.

Lists will automatically be adjusted when loaded, to account for deleted records. If you added a coin record to a saved navigation list file and then deleted that record, loading the list from file will exclude that record.

When saving a navigation list to file, you will be prompted for a file name and description. The list file will always be saved under the country name's subfolder, within the Lists folder of the EzCoin installation path. The files will have an extension of .LST.

When loading a list, the country subfolder will be checked for list files and their names, descriptions, and total coin record counts will be shown as in the dialog window below.

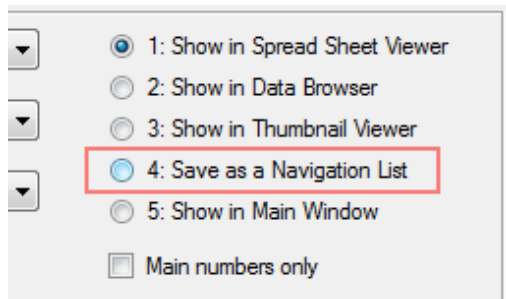


Use the **Delete** button to remove selected lists permanently. There are no backup list files, so choose your deletions carefully.

You can also double click on any list file to open it.

Assignments from Reports and Other Sources

1. Reports and searches provide the option to send the coin records directly to the active navigation list, as the following screen fragment from the Quick Stats 1 Report shows.



2. A coin list can be transferred to the active navigation list, or exported to file.
3. The report viewer provides the ability to assign the report results (or bookmark sections of the report) to the navigation list. Bookmarked records within the viewer can also be saved to file.
4. Tag lists can be saved to file and then loaded as a navigation list.

Creating a Slideshow

Choose the **Run Slideshow** option to cycle through the list by showing each coin record on the main EzCoin screen for a period of time. The amount of time to show each coin record is controlled by a general preference option (default is 5 seconds). The slideshow will automatically cancel the next time you run any menu option from the main menu. While the slideshow is running, the title bar of the main application window will indicate this with the text (*Slideshow*) appearing after the country file name.

Sorting Lists

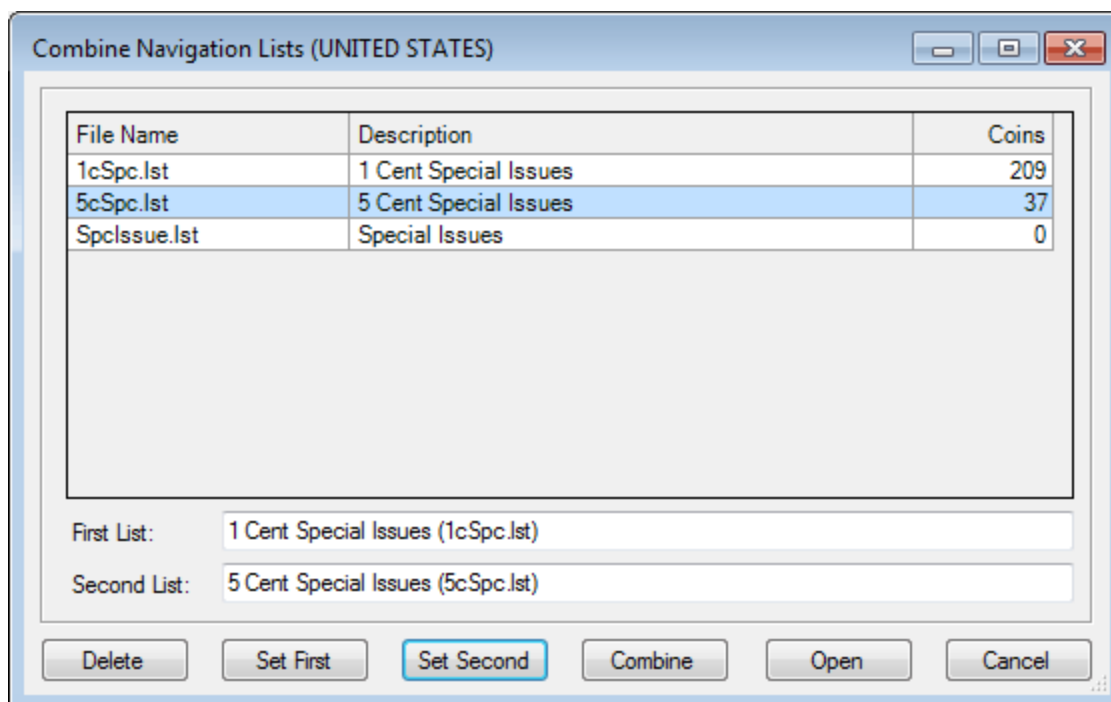
Choose the Sort option to reorder the coin list on any of the primary attributes. The sort dialog window is identical to the one used for report profiles, allowing for up to 5 field levels, in ascending or descending order per field.

Combining and Editing Lists

Similar to combining reports together to create custom coin record result sets, you can combine 2 navigation lists together in the exact same way.

Add	Coin records from the first list are combined to with the second list, such that the records unique to both lists are all that remains. Duplicate entries are not created.
Subtract	Subtracts all coin records from the first list which match on the same 5 key fields from the second list.
Combine	Takes all primary key fields from both lists and discards any records which are not common to BOTH lists.

The combine list dialog window is shown below.



Select a list from the data grid and click on **Set First**. Select the second list and click on **Set Second**. Then click the **Combine** button (this button will change to **Add** or **Subtract** depending on the type of combination you chose from the menu).

Click on the **Combine** button and you will be prompted for a name and description for the list which will contain the combined coin records.

The **Delete** and **Open** buttons work the same as in the Load list dialog window.

Ad-hoc Reporting and Editing

There are two methods for editing the contents of the active navigation list. You can transfer the list to the Coin List viewer and then remove unwanted records. You can also run an ad-hoc report by choosing the **Ad Hoc Report** option from the Navigation List submenu.

There is no provision to reorder individual records within the list, other than applying a sort order.

Editing Coin Information

Coin Record Attributes

Primary coin details are organized in the top left section of the window, including most pre-supplied values.

The upper right section of the window is for image views, which can show the primary or alternate reverse/obverse images.

The bottom half of the window contains the data grids for secondary coin attributes. The data grids are tabbed for easy access. Simply click a tab to view the inventoried status for the associated data type.

Additional windows are available which can be shown alongside the main EzCoin window. These windows are available from the **View** menu, for the following:

Custom Fields	A country file can be assigned additional data fields for your inventory, using whatever naming conventions and data types you need.
Comments	EzCoin by default reserves a small space below the coin image area and above the data grids to allow for comments to be added to any coin record. If you would like more space to view/enter comments, a secondary window can be displayed and resized accordingly.
Grade Data Viewer	The grades data grid can contain many fields, requiring horizontal scrolling to see all of the record. EzCoin allows you to show a selected record from the data grid in a vertical format using the special viewer options in the View menu.

Saving Coin Records to Your Inventory







With pre-supplied country files, all records will initially not be part of your inventory and will need to be saved to add them. For custom country files you create, there will initially be no records whatsoever.

When saving a record, the minimal amount of information required is the denomination – all other attributes are optional. This is under the provision that the combination of the 5 key fields (Denomination, Year, Type/Reign, Variety, and Mint Mark) is unique for a given coin record.

Saving a record to your inventory can be accomplished in multiple ways:

- Click on either of the blue checkmark buttons. There is one in the toolbar at the top and a second one in the grades toolbar at the bottom beneath the data grid. Some of the floating secondary windows may also contain a blue checkmark button.
- Use the shortcut key (default is Ctrl + S) or choose the **Save** option from the **Edit** menu.
- The [report viewer](#) has the ability to add records using either [Rapid Multi Entry](#) or Quick Inventory methods.
- Rapid Multi Entry is also available from the Edit menu.
- Auto-saving options are available from the [Grades Quick Edit](#) window for grade data.
- Auto-saving can be enabled when adding grades to the active coin record. Auto-saving features are intended for bulk data entry and are disabled by default.
- Use the Duplicate record feature to make a 100% copy of the current coin record displayed in the main EzCoin window.
- The [EzImport](#) feature will import all inventoried records from EzCoin version 1 (you must have the latest EzCoin version 1 with the Export for EzCoin 2 menu option installed).

You can determine the status of an inventoried record by checking the status icon at the bottom left corner of the EzCoin window.

	There is no country file opened, or no current coin record shown in the main window.
	EzCoin is busy performing a background task and can't be interrupted.
	The record is pre-supplied data and has not been added to your inventory.
	The record is part of your inventory and is based on pre-supplied data.
	The record is part of your inventory and is a custom variety or part of a custom country file.
	The record is one of two or more duplicate coins based on the 5 key fields (Denomination, Year, Type/Reign, Variety, and Mint Mark).

In addition to this indicator, a small colored checkmark will appear to the right of the Denomination dropdown list at the top of the main EzCoin window with one of 3 colors:

Green	The record is part of your inventory and is based on pre-supplied data.
Violet	The record is one of two or more duplicate coin records.

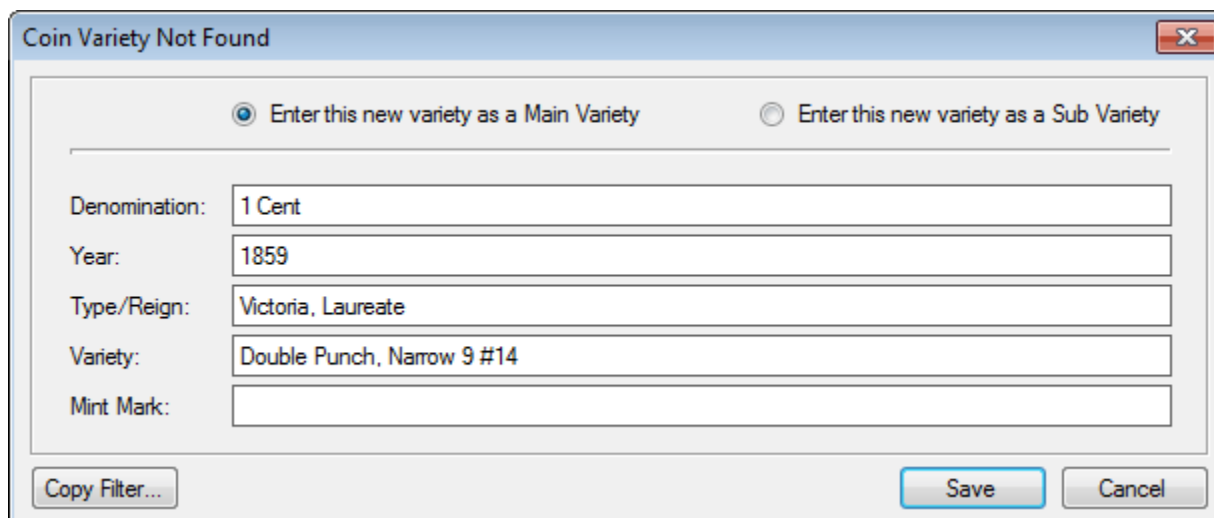
Red	The record is part of your inventory and is a custom variety or is part of a custom country file.
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Saving Pre-Supplied Records

Call up any pre-supplied coin record and simply click the blue checkmark button to save it to your inventory. You are free to modify existing pre-supplied fields before saving. EzCoin will keep a permanent copy of all pre-supplied data for every record, allowing for easy restoration if you changed a field by accident.

Saving Custom Varieties

To save a pre-supplied record under a custom variety, call up any supplied record and modify any of the 5 key fields to form a unique combination that doesn't currently exist. Then click the blue checkmark button to save the record. This will display a dialog window.

A screenshot of a Windows-style dialog box titled "Coin Variety Not Found". It has a close button (X) in the top right corner. Inside the dialog, there are two radio buttons: "Enter this new variety as a Main Variety" (which is selected) and "Enter this new variety as a Sub Variety". Below these are five text input fields with labels: "Denomination:" (containing "1 Cent"), "Year:" (containing "1859"), "Type/Reign:" (containing "Victoria, Laureate"), "Variety:" (containing "Double Punch, Narrow 9 #14"), and "Mint Mark:" (which is empty). At the bottom left is a button labeled "Copy Filter...". At the bottom right are two buttons: "Save" and "Cancel".

You will be asked to confirm the record as a main variety or sub-variety, after which the record will now be marked as a custom type, even if it was based on pre-supplied data. If any pre-supplied data existed, it will now be treated as custom information and no longer associated with pre-supplied data updates from SoftPro.

Duplicating a Record

A coin record can be duplicated with a 100% identical copy by clicking on the duplicate button in the toolbar. When a given coin record based on the 5 key fields has been duplicated, the status bar at the bottom of the EzCoin window will show the current and total number of duplicate records.

Saving Pre-Supplied Customizations

If you want to change any pre-supplied information without adding a record to your inventory, the special icon to the left of the Help button in the toolbar can be used.



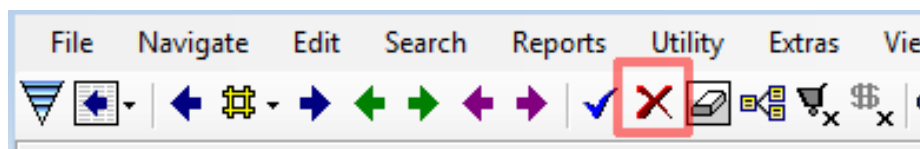
This will save any changes you make to the following pre-supplied values:

Period	Mintage/Proof Mintage	Designer
Mint Location	Weight	Thickness
Edge	Description	Diameter
Composition	Record Coin Quantity	Grade Market Values

The record will not be saved to your inventory. Note that if the record is already in your inventory, this icon will behave exactly the same as clicking on the blue checkmark save icon.

Removing Records from Your Inventory

The red X icon adjacent to the blue checkmark in the toolbar is used to remove the current displayed coin record from your inventory.



How the record is removed depends on whether the coin record is part of the pre-supplied data provided by SoftPro, or is a custom variety. For custom country files, the records are always treated as custom varieties.

- Custom variety records are deleted and will no longer be available in the country file.
- Pre-supplied records will be returned back to pre-supplied status – all custom changes to supplied fields and any of your own data (i.e. grades, comments, location, etc.) will be discarded, leaving only the pre-supplied field information.

Purchase/Sell History and Priority Lists

You will not be able to remove a custom variety coin if there is any information saved in the Priority Want List, Priority Sell List, Purchase History or Sell History for the coin record based on the 5 key fields. You will need to remove the entries from those lists first.

Removing Duplicate Records

If the displayed coin record is a duplicate (i.e. not the first record in a set of duplicated records), it will also be removed, as a duplicate record is considered to be a custom variety even if it's based on a pre-supplied coin record.

Clearing Field Information

The eraser icon in the toolbar allows you to clear all fields which are not pre-supplied values, which includes:

Comments	User Catalog ID values
Inventoried grades	Custom image links
Price locks	Location
Serial number	Custom field values

Clearing the fields does NOT save the record changes to the country file. You must still click the blue checkmark button to commit the changes.

If you want to clear everything in the main EzCoin window, hold down CTRL while clicking the eraser button.



Click = Clear

+Ctrl = Clear All

These 2 clear field options are also available in the **Edit** menu as **Clear Fields** and **Clear Screen**.

Editing Grade Data

EzCoin uses the bottom half of the main window to show a set of tabbed data grids, containing records for secondary coin information. The first data grid is used for displaying inventoried grade status, and also the status of any grade if it's part of the priority want or priority sell list.

Grades (2)		Purchased (2)	Sold	PWL	PSL	Custom		
	Grade	BV	Market Val	Your Val	Qty	Net Val	Graded By	
\$+	Fair	Yes	\$1,211.43		1	\$1,473.26		
\$+	PF-65		\$1,967.30		1	\$1,967.30		
	Poor							
	AG							
	G							
	VG							
	F							
	VF							
	EF							
	P-1							

Your Value:
 Quantity:
 Market Value:
 BV:

Each of the tabs will show a record count in parentheses to the right of the tab label. This is the number of records of the associated type which are assigned to the current coin record.

The status icon indicates each grade's inventory/PWL/PSL state, according to the icon types shown below.

\$+	The grade is part of your inventory.
\$+	The grade is in the Priority Want List.
\$+	The grade is in the Priority Sell List.
\$+	The grade is part of your inventory and in the PWL.
\$+	The grade is part of your inventory and in the PSL.
\$+	The grade is in both the PWL and PSL.
\$+	The grade is part of your inventory, in the PWL and also in the PSL.

If a data row is shaded in light yellow (this color can be changed in the EzCoin preferences), then the grade was inventoried based on its bullion value (precious metal content for gold, silver, platinum and palladium).

If a market value column's cell is shaded in yellow only, it indicates that the bullion value of the coin (regardless of grade) is greater than its current market value.

If the grade row shows a simple red checkmark ✓, this indicates a market value has been assigned to the grade, but the grade itself has not been inventoried.

Grade Status Area

Details below the grid are based on how many grades are currently selected in the data grid itself. The table below summarizes these input fields.

Your Value	EzCoin normally applies a market value to any grade, when available. Market values can be pre-supplied from SoftPro or in
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	<p>the case of custom countries, must be supplied by you.</p> <p>You can override a market value price by entering a value into this field and it will be considered the “absolute” price for the grade. The market value will be ignored when calculating Net Value, which will now be <u>Your Value * Grade Quantity</u>.</p> <p>Unless you have a reason to lock a price for a grade into a value of this type (i.e. to prevent SoftPro updates from replacing customized market values from updates), you should always use the market value field to set a price.</p>
Quantity	<p>The number of items for the selected grades which will be part of your inventory. A value of 0 is acceptable. Note that this quantity is not the quantity of physical coins in your inventory. Each grade has a Coins Quantity for Sets value associated with it (normally this is 1). The physical coin quantity is the quantity in this field * the Coin Set Quantity.</p>
Market Value	<p>This field only appears when a single grade is selected in the data grid. The market value can be modified or entered (if none is present) by simply entering a new price in this field.</p> <p>If you erase the contents of this field and a pre-supplied market value exists, EzCoin will restore the original pre-supplied value.</p> <p>Always enter prices based on the currency conversion rate you've assigned to the country file.</p>
Bullion Value (BV)	<p>If the coin contains a precious metal composition, and also a valid weight, EzCoin will calculate the bullion value based on the current precious metal price values assign to the country and display it in this field.</p> <p>If the coin has no precious metal content or a missing/invalid weight, the bullion value will not appear. This value can't be modified, and it would be the same value for any grade inventoried.</p>

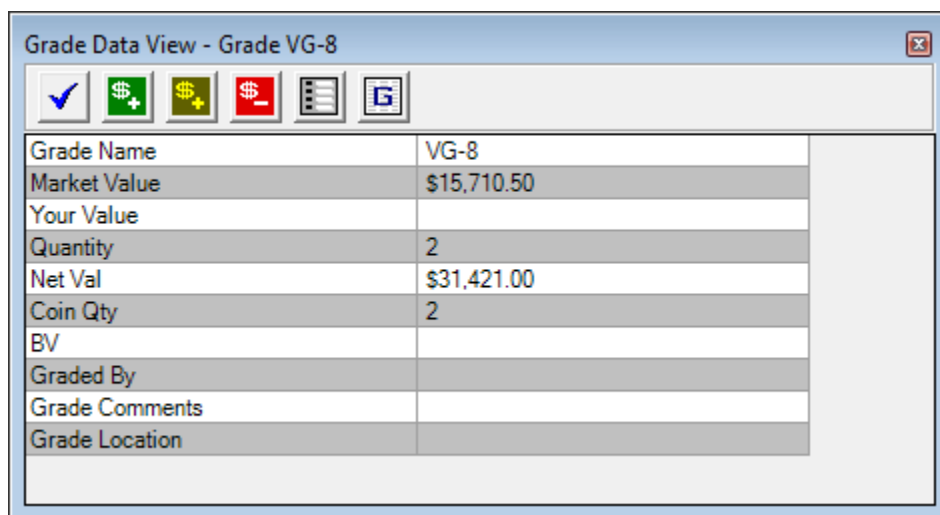
Filtering the Grid Fields

The grades data grid can contain many fields, some of which may not be of interest to you for displaying in the main EzCoin window. If you want to only show a subset

of the fields for a data grid, you can filter out the ones you don't want to show. Refer to the help topic under **Options** for the item *Field Settings for Grade Data*.

Using the Vertical Grade Display View

As an alternative to filtering the data grid fields, you can show the fields for the current selected row in the data grid in a secondary window. Use the **Grade Data Viewer** item under the **View** menu to display this secondary window.



This window can be dragged and resized as needed. It will always show the current selected record for the active data grid.

Selecting and Saving

EzCoin provides a small toolbar within the grades tab area to assist with adding and removing grade information.

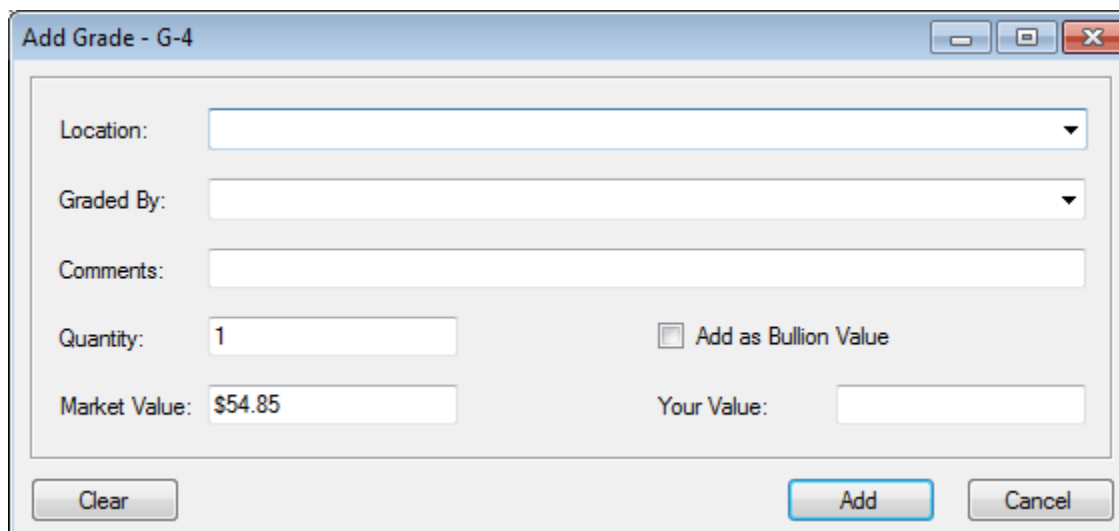


1.	The blue checkmark button provides the same shortcut functionality as the one in the top toolbar. It will save all changes for the current coin record to the country file.
2.	The green \$+ button will add the selected grades to your inventory, using the current quantity (and Your Value if entered). Changes are not saved to the country file until you click the blue checkmark. Note that EzCoin has a general preferences option to auto-select and add grades when you click on the blue checkmark. This option basically is the same as clicking the \$+ and blue checkmark button in one step.
3.	The yellow \$+ button will add the selected grades as bullion valued items.

	The net value will now be based on the bullion value of the coin, not the market value of the grade.
4.	The red \$- button will remove selected grades from your inventory. If the grade isn't currently part of your inventory, this option will have no effect.
5.	This option will display the single grade edit window (see below), allowing you to change all the field values for the grade. You can only select one grade at a time to use this option.
6.	This option will display the quick edit window for all grades, in a spreadsheet format.
7.	Given that EzCoin has options to auto-commit selected grades when saving, you may want to ensure that grades are not selected when working with other data such as the coin details fields. This button simply de-selects all grades in the data grid.

Adding Grades with Detailed Attributes

If you hold down the Ctrl key while clicking either the green or yellow \$+ buttons, a dialog will be displayed allowing you to enter any of the available grade attributes at one time.

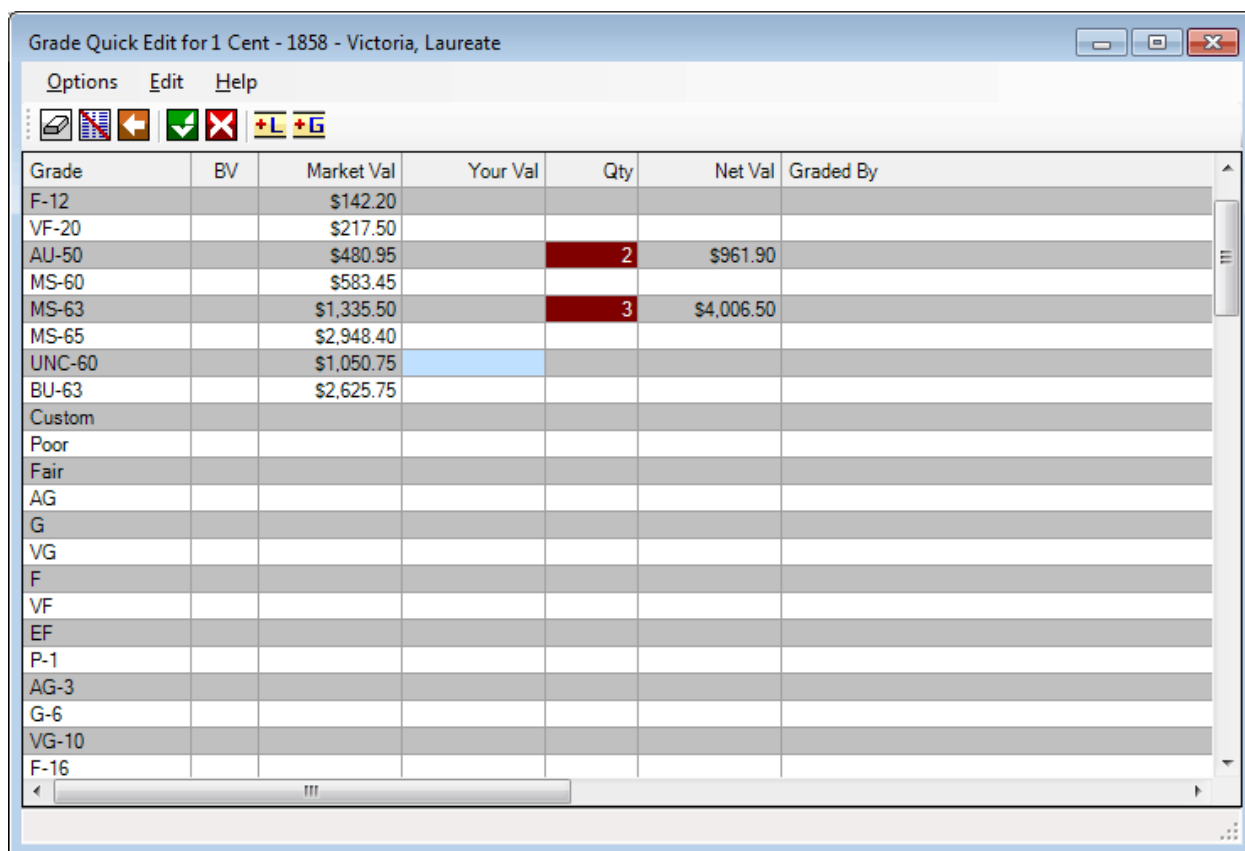


This shortcut avoids the need to use the quick edit or single edit options after adding the grade to your inventory.

This dialog is also used to edit a single grade record which is already part of your inventory.

Quick Editor for Inventoried Grades

The grade tab in the main EzCoin window has a shortcut button for quick edit window, allowing you to modify all of grade records at one time. The quick edit option is also available from the popup menu when you right click within the data grid area. You can also double click any area of a data grid to enter Quick Edit mode.



The title bar indicates the denomination, year and type/reign for the current coin record.

There is a small toolbar window below a menu of options, with the remainder of the window being the spreadsheet editor.

Changing the values in the grid is done by simply moving the selection cursor to any cell, and typing in a new value (F2 can be used to initiate edit mode, but pressing a valid key will also start edit mode). Once in edit mode, enter a new value, and press ENTER to commit the change, or press ESC to cancel. Clicking with the mouse on any area outside the cell being edited will behave as if you hit the ENTER key. New changes will be reflected by a different background color for the data cell.

Some fields can't be edited as they contain information which is read-only, such as the grade name or the net value. The cells will be color-coded to indicate if a field is read-only.

Grid Display Order

A general preference option can be used to set the grid display order to match the data grid row order in the main EzCoin window. This option is enabled by default. For example, if MS-65 is the first grade in the main EzCoin window, then it will also be the first grade in the quick editor grid. If this option is not enabled, then the grid order will use the EzCoin pre-defined sort order for grade data.

Grid Fields

If you have filtered any fields in the data grid in the main EzCoin window, then they will also be filtered out in the editor. If you need to edit fields which you have turned off, use the single grade edit mode instead.

Toolbar Options



1.	Clear all of the data cells for the selected record (i.e. location, graded by, etc.).
2.	Remove all inventoried grade information for the coin record.
3.	Undo all changes since you started the edit session.
4.	Save changes.
5.	Cancel all changes and exit the editor.
6.	Use a pick list window set the grade location.
7.	Use a pick list window to set the graded by value.

Options Menu

Apply	Apply all changes and exit the editor. By default, EzCoin will not save changes to the country file until you click the blue checkmark icon from the main window. If you want to auto-commit changes to the country file directly from the quick edit window, a general preference option can be enabled for this.
Exit	This option will exit the editor without saving any changes you may have made.

Edit Menu

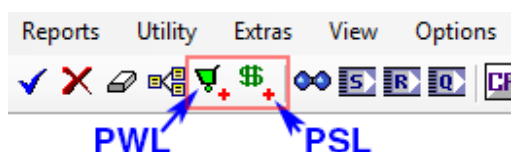
Undo	This option will undo every change you made to all records.
Clear	Erases all field data for the selected grade.
Clear All	Erases all field data for all grades in the grid.
Pick Lists	<p>Pick lists are used to choose from a set of existing values for the following information:</p> <ul style="list-style-type: none">• Graders• Location <p>Pick lists will show a popup window with a list of choices.</p>

Priority Want and Sell Lists

Priority want and sell lists are used to identify grades which you would like to buy or sell. The PWL/PSL system is designed to work with grades; however you can add any coin record to the list even if you don't select a grade. In this case EzCoin will identify the PWL/PSL entry as *Any Grade*, meaning you want to add the coin to the list and don't care which grade it is you wish to sell or buy.

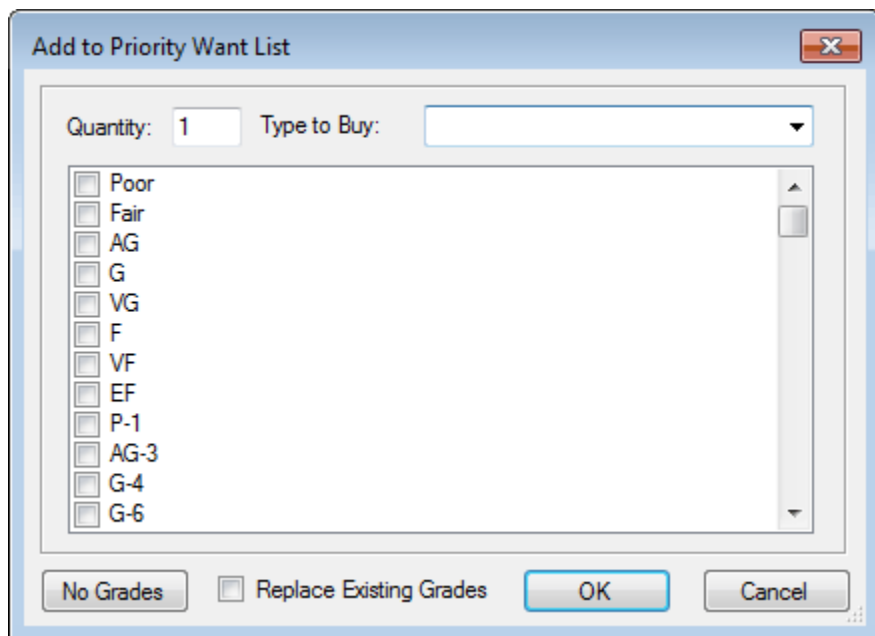
Adding Grades with the Main EzCoin Toolbar

To add specific grades to the PWL or PSL, select them in the grades data grid and click on either the PWL or PSL buttons in the main toolbar.



When the PWL or PSL buttons are shown as above, this indicates the coin and/or 1 or more of its grades are part of the want or sell list. Otherwise, the button icons will remain in a grayed out status.

EzCoin provides quick PWL/PSL modes or the standard (default) interactive mode. For interactive mode, a dialog window will be displayed with options.



You can enter a Quantity and Type to Buy/Sell value for all selected grades. The checkbox list will reflect the current grade selection in the main EzCoin window. You

can refine this selection by checking or un-checking any of the grades in the list. Use the **No Grades** button to clear the selection.

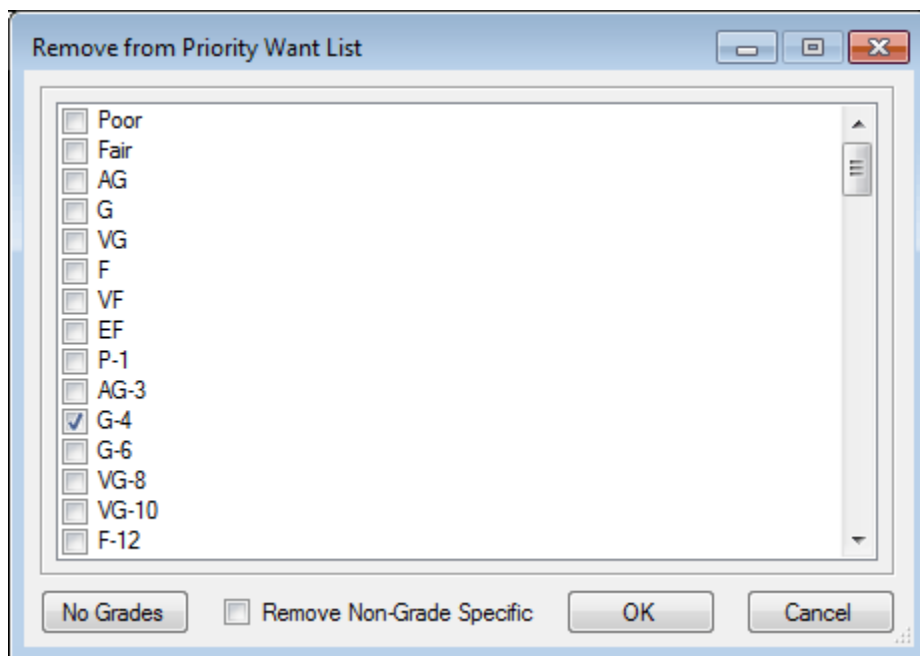
The **Replace Existing Grades** checkbox determines how any existing PWL/PSL entries are affected. If this option is checked, then any existing PWL/PSL entries are removed and replaced with only the new values in the checkbox list. If you leave this option unchecked, then the grades you check will be added to what is already present in the record.

If no grades are selected, this will result in a PWL/PSL entry displayed in the reports grade column of **Any Grade**.

The Type and Quantity values are applied to the selection. If you want to use different type or quantity values on a per grade basis, you must add them one at a time, and ensure that the Replace Existing option is NOT checked.

Removing Grades and Clearing the List

To remove entries from the PWL/PSL, hold down CTRL while clicking on the PWL or PSL button in the toolbar. The dialog window displayed allows for removal of one or more grades from the associated list.



The checkbox list will reflect the selection of grades in the main EzCoin window. Use the **No Grades** button to clear the checkbox list. The removal of entries is directly tied to the checkbox selections in the list. If you selected every grade, this removes all entries from the PWL/PSL, even if the grade wasn't originally part of the list.

The **Remove Non-Grade Specific** option is designed to allow removal of PWL/PSL entries which had NO grades in the list to begin with (i.e. the PWL/PSL entry for the coin record is shown as "Any Grade"). This option, if checked, will ensure that a generic PWL/PSL entry without grade information is properly removed from the list.

PWL/PSL Auto-Save and Inventoried Status

An important thing to note about the PWL/PSL system is that records do not have to be inventoried to be part of either list. These lists are maintained separately from the inventoried grade information. The blue checkmark buttons are not used to save PWL/PSL entries. Instead, when you click on the PWL/PSL buttons in the toolbars to add a PWL/PSL entry, the information is automatically saved to the country file in the associated list.

PWL/PSL Quick Entry Modes

A general preference option can be enabled for PWL/PSL quick entry. When enabled, you will no longer be provided any dialog window to enter a type, quantity or grade selection list. The selected grades will be added to the PWL/PSL without a type value and with a quantity of 1. All existing entries for the coin record will be replaced with the new selection.

You can still use interactive mode to show the options dialog windows by holding down the **SHIFT** key when clicking the PWL/PSL buttons in the toolbar.

The quick entry modes also apply to removing entries when CTRL clicking the PWL/PSL buttons (hold down **CTRL + SHIFT** to bring up the remove options dialog window if quick mode is enabled).

PWL/PSL Menu Options

The Edit menu provides PWL/PSL submenu options to add, remove and clear entries. If quick entry mode is enabled, you will once again need to hold down the SHIFT key while selecting the menu item to display the add/remove dialog windows.

Adding PWL/PSL Entries from Data Grids

You can add PWL and PSL tabs to the main EzCoin window as data grids for display and quick edit the list entries. The tabs can be enabled from the EzCoin general preferences. As with any of the data grids in the main window, you can right click on the grid for a context-sensitive popup menu with common options which are also available from the main menu, or double click the grid for quick edit mode. The PWL/PSL data grid tabs will also have their own toolbar for options.

Quick Edit Mode

The Quick Edit option under the Edit menu contains submenu choices for using the spreadsheet editor for PWL/PSL entries.

Editing the Type List

When you add new entries to PWL/PSL, you can choose the type to buy/sell from a dropdown list of pre-supplied values. However, you can also type new custom text strings in the dropdown edit field and your custom types will be added to the existing list. A list editor is available for PWL/PSL types from the **List Editor** option under the **Utility** menu.

Type values are generic notes you can attach to any PWL/PSL entry.

Priority Want/Sell List Toolbar Options

An alternate method of working with the PWL/PSL lists is by using the toolbar which appears below the PWL/PSL data grid tabs.



1	Add to the PWL/PSL using an alternate dialog window than the one you would see using the buttons on the main EzCoin toolbar.
2	Remove selected records from the PWL/PSL. The selection is not in the grades tabs grid, but rather then selected records in the PWL/PSL tabs.
3	This button will present a dialog window for editing a single selected PWL/PSL record in the data grid.
4	This is a shortcut to the PWL/PSL Quick Edit mode.
5	This is a shortcut to for viewing/editing the PWL/PSL for the country, not just the specific coin record. Refer to the Editing Lists via Searches help topic for more information.

Adding/Editing from the PWL/PSL Toolbars

The single record mode for adding and editing PWL/PSL entries is slightly different than the versions provided from the main EzCoin toolbar.

Purchase and Sell History

The purchase and sell history maintain an historical record of coin transactions. The information in the history is independent of your inventoried grades, and also the priority want and sell lists. Transactions are based on the date you make a sale or purchase, and can include multiple transactions for the same coin and same grade of that coin. There is in effect 5 separate lists of graded coins in EzCoin:

- The Priority Want List is the list of coins (by grade) for which you want to purchase.
- The Purchase History is the list of coins which you have purchased.
- The Grade Inventory represents the coins that are currently in your collection.
- The Priority Sell List is the list of coins for which you want to sell.
- The Sell History is the list of coins which you have sold.

When you add or remove coin grades for anything except the Grade Inventory, the list changes are automatically saved to the country file. Only inventoried grade records are associated with the blue checkmark button in the EzCoin main window's toolbar.

As with the Priority Want/Sell Lists, you can add coins to purchase/sell history without specifying a grade, for which they will appear in the list as "Any Grade". Purchase and sell history also maintain some additional attributes for a transaction besides the grade:

- Quantity of coins purchased/sold (the quantity can't be zero).
- The price of the purchase or sale (the price can be zero, but it can't be empty).
- The purchase or sell date (the date can be empty, but should be provided to allow for transactional reports by date).
- The party for which you sold to or purchased from.
- Any specific comments to attached to the transaction.

Purchase/Sell History Toolbar Options



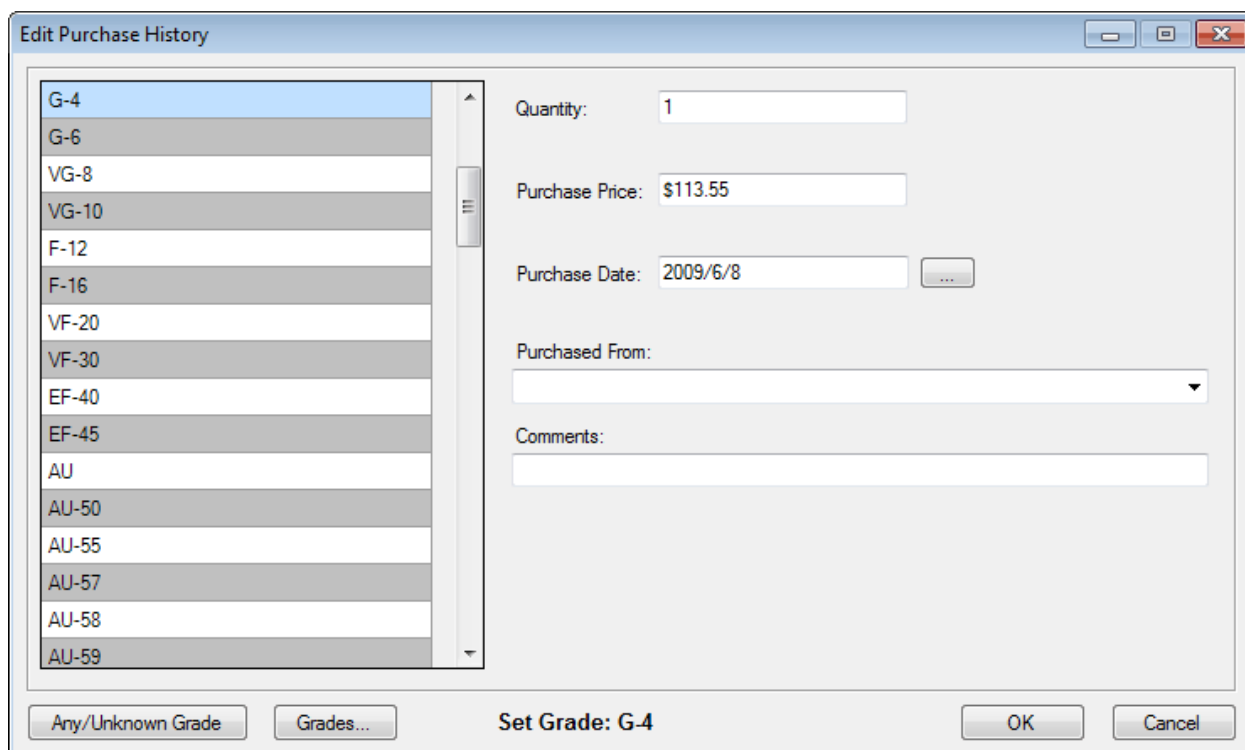
These options appear in the Purchased/Sold tabs of the EzCoin main data grid area. Unlike the PWL/PSL lists, there are no buttons for purchase/sell history in the EzCoin main toolbar.

1	Add a transaction to the history.
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2	Remove selected records from the transaction history.
3	This button will present a dialog window for editing a single selected transaction in the data grid.
4	This is a shortcut to the history Quick Edit mode.
5	This is a shortcut to for viewing/editing the transaction history for the country, not just the specific coin record. Refer to the Editing Lists via Searches help topic for more information.

Adding or Editing Transactions

The add/edit button options will show a dialog window like the one below.



The **Any/Unknown Grade** button is used to assign/add a record without choosing a grade from the list on the left. If you click on the **OK** button, a grade must be selected from the list.

Use the **Grades** button to create a filtered list of grades to choose from. This will create a smaller grade list on the left in the dialog window, which can make selecting grades from specific subgroups easier by avoiding scrolling the list up and down to find the correct grade.

The purchase/sell date provides a quick pick calendar popup dialog using the "..." button to the right of the date field.

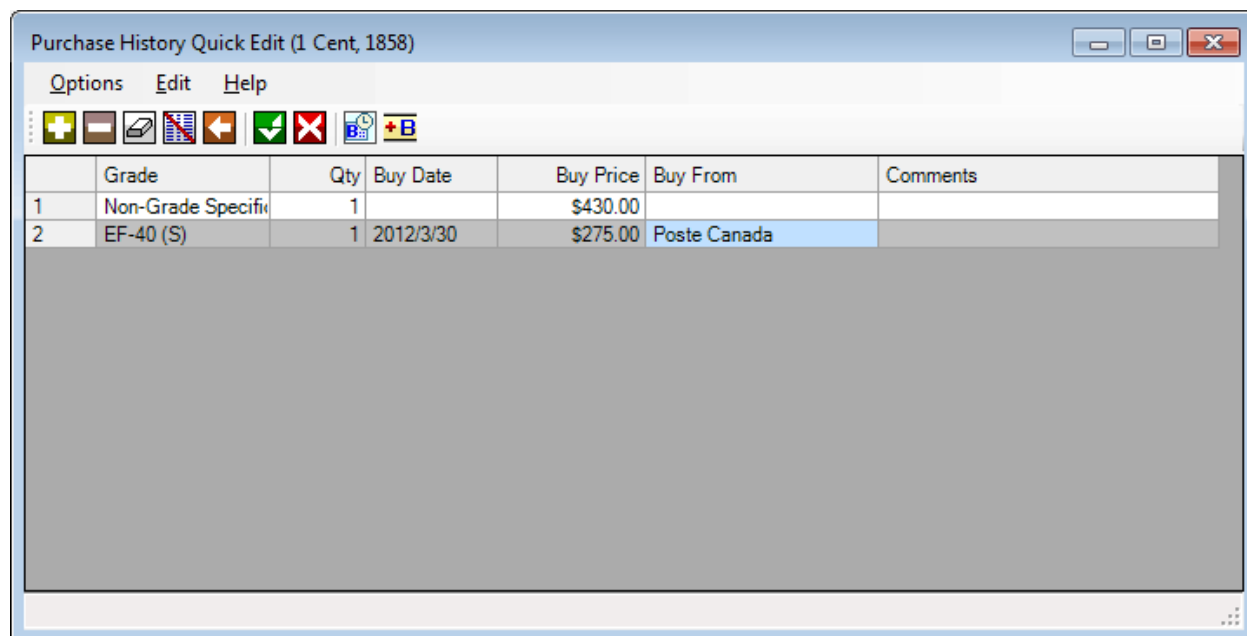
Quick Edit for Priority Lists and Purchase/Sell History

These spreadsheet editors are slightly different from the one used for inventoried grades.

The quick editor for grade information presents all available grades for the current country as a fixed number of data rows in the editor window. You can't add or remove records from this grid.

PWL/PSL/Buy/Sell editing allows for record additions and removals. The editor window looks similar to the grade editor, with some changes to the toolbar, which are summarized in the table below.





The quick edit window works like a typical spreadsheet editor. Select a cell and press F2 to start editing the cell, or simply start typing some text. Use ENTER to commit your cell changes (or click on a different cell), or press ESC to cancel the edit.

Grade information is based on a drop down list accessed directly from the cell in the grid. You can only choose an existing grade from this list, or choose the first item from the list which assigns a *Non-Specific Grade* to the record. This type of record indicates you have no preference for a specific grade, just the coin record itself.

For the type to buy or sell, or who a coin is purchased from/sold to, you can enter any text value, or access a pick list window, using any of the following methods:

- Double click the cell
- Use the shortcut key
- Choose the option from the menu
- Click on the toolbar icon

The market and net values for PWL/PSL lists are not modifiable. They are for display purposes only to indicate the net value of the graded item in PWL/PSL based on current market value. For buy/sell history, all values can be modified.

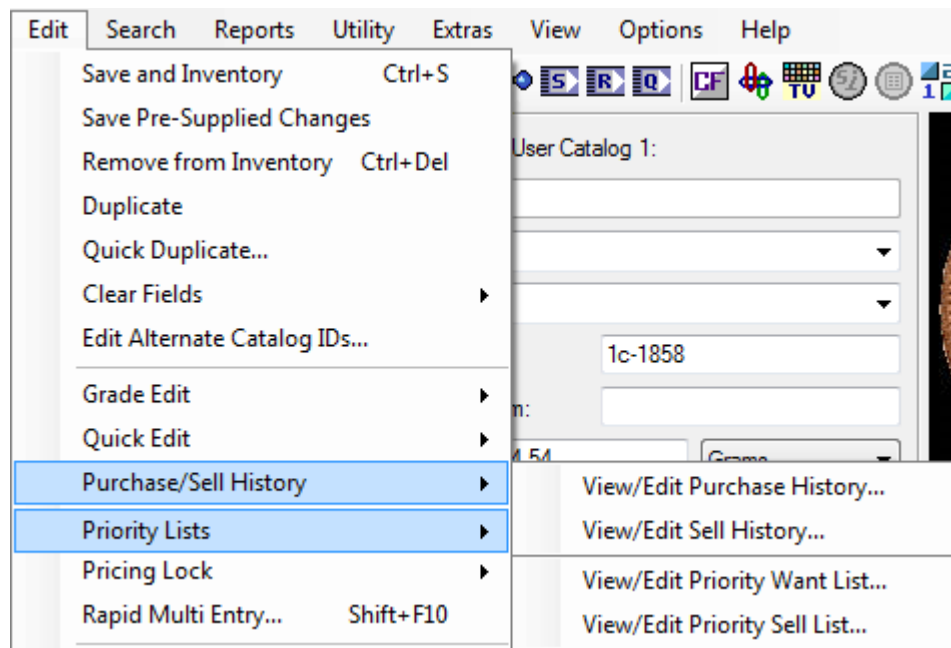
The toolbar contains several options, which can vary based on the type of coin information you are editing.



1.	Add a new record to the list.
2.	Remove the selected records.
3.	Clear the selected row of information (i.e. type to buy/sell, comments, dates).
4.	Clear all data rows of information.
5.	Undo all changes since you started the edit session.
6.	Save changes.
7.	Cancel all changes and exit the editor.
8.	<p>These are shortcut buttons for data pick lists (type to buy/sell, purchased from, sold to), which can also be accessed from the Edit menu or the Ctrl + P shortcut key.</p> <p>For buy/sell history an additional button to set the date of purchase or sale will appear. This will present a popup calendar window to choose a date. You can also use the Ctrl + D shortcut key.</p>

Searching Priority Lists and Purchase/Sell Transactions

These options are available from the toolbars within their respective data grid tabs of the main EzCoin window (PWL, PSL, Purchased, Sold) and also from the **Edit** menu.



Choosing these options will provide a simple filter for showing all coins, or a subset of the complete list for the country. The Purchase History and Priority Want List filter windows are shown below.

Review/Edit Your Purchase History

From Date: ... To Date: ...

Buy Quantity: Any Quantity ☐ Case-Sensitive

Buy Price: Any Price ☒ Exact Match

Comments:

Bought From:

Denomination: Year: to

Type/Reign:

Variety:

Mint Mark: Sort By: Purchase Date

☒ All Transactions ☐ For Inventoried Coins ☐ For Non-Inventoried Coins

All Grades

Matches: 0

For purchase/sell history, you can set a date range which is based on when the coins were purchased/sold. When left blank, all dates will be matched, including coins which have no assigned date in the list.

The buy/sell quantity has drop down list which allows for some basic types of operations:

- Any quantity
- And quantity greater than the value you enter.
- Any quantity less than the value.
- Any quantity equal to the value.
- Any quantity greater than or equal to the value.
- Any quantity less than or equal to the value.

The buy/sell price has the same set of operations as quantity.

Comments, purchased from/sold to are general text filters. If you check the **Exact Match** option, then your input values must match completely against the record in the list. If unchecked, then the value you enter only has to appear as part of the overall text data for the field.

Check the **Case-sensitive** option to force all text input fields to match upper/lower case letters exactly.

The 5 key fields (denomination, year, type/reign, variety and mint mark) work the same as in other reports and searches in EzCoin.

Purchase and sell history results can be sorted by one of 4 methods:

- Date of the sale/purchase
- Denomination
- Year
- Grade

Use the **Grades** button to filter the list to specific grades. Note that once you select a grade subset, any coins that were added with a specific grade (i.e. they appear on reports as "Any Grade"), they will no longer be visible.

The 3 radio buttons at the bottom are a master filter against the list. The default value of **All Transactions** displays all coins which match the search criteria.

Choosing the **For Inventoried Coins** option will only show transaction history against coins which are currently part of your inventory.

The **For Non-Inventoried Coins** option will only show transactions for coins which are NOT part of your inventory. For custom coin varieties and custom country files, this option should not be used, as it will never show transactions.

Click on **Reset** to set all inputs fields to blank values, which will result in the complete list being displayed.

Click on **Find** to start a search. If any matches are detected, they will appear in the status area at the bottom left corner of the window. Click on **Show** to display the results.

Review/Edit Your Priority Want List

Buy Quantity: Any Quantity ☒ Exact Match ☐ Case-Sensitive

Type to Buy:

Denomination: Year: to

Type/Reign:

Variety:

Mint Mark: Sort By: Denomination

☒ All Priority List Items ☐ For Inventoried Coins ☐ For Non-Inventoried Coins

Reset Grades... All Grades Find Show Cancel

Matches: 0

The search filter window for Priority Want/Sell Lists is much simpler than purchase/sell history.

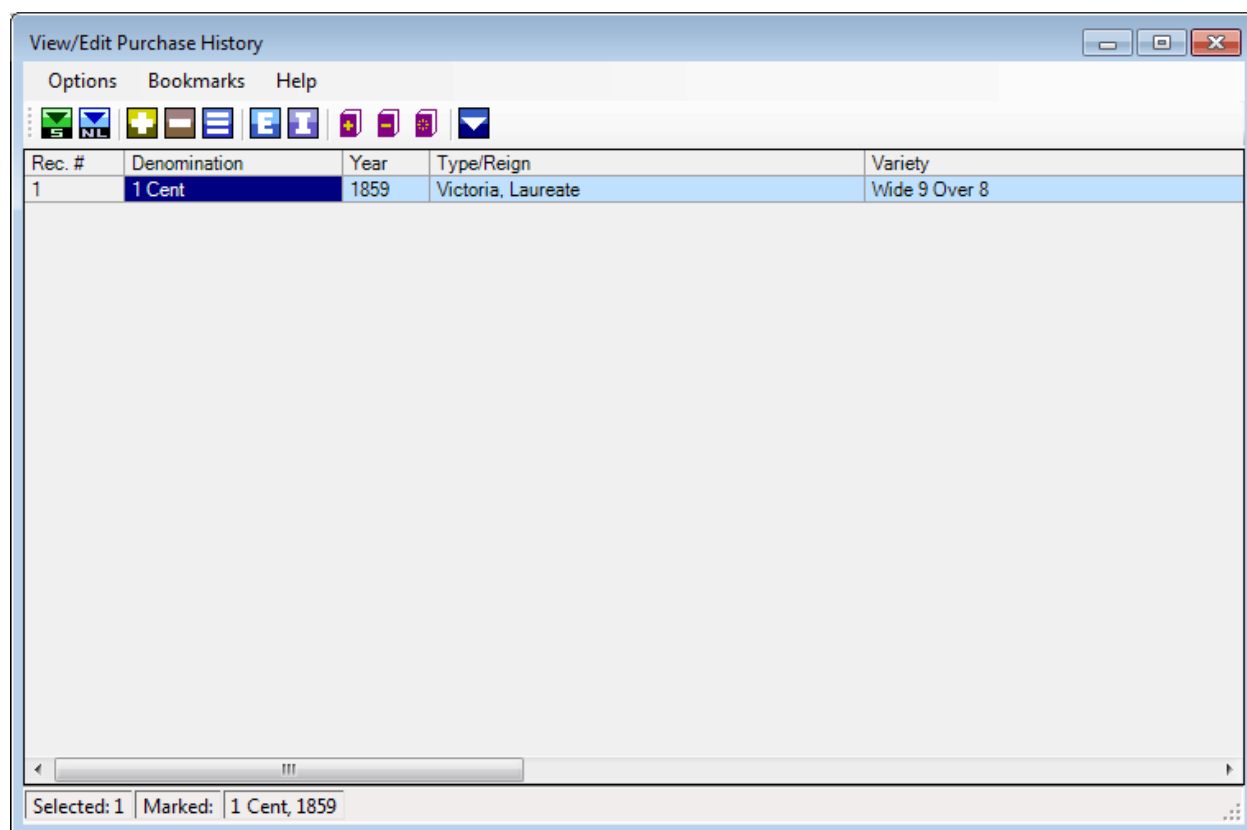
You only have quantity and type (to buy or sell) fields related to the records in the list. The remainder of the window is for the 5 key coin fields.

As there is no purchase or sell date, the sorting options will not include dates.

The 3 radio buttons at the bottom work exactly like they do for Buy/Sell transactions and are used to filter the search results based on coin inventoried status.

Viewing the Results

Matching coin records in the list will be displayed in a generic list window, shared between all 4 list types.



It's important to note that the results are not reports and can't be printed. If you need to view results as a report, you can run the options from the Search/Report menus for these list types, or transfer the results to a navigation list, then transfer that list to an ad-hoc report.

The columns which appear will be fixed for each type of view and may not be changed.

Regardless of the list type, the first 5 fields will always be:

- Denomination
- Year
- Type/Reign
- Variety
- Mint Mark

The remainder will be based on the search type as follows:

Priority Want List	Priority Sell List	Purchase History	Sell History
Grade	Grade	Purchase Date	Sell Date
Quantity to Buy	Quantity to Sell	Grade	Grade
Type to Buy	Type to Sell	Quantity	Quantity
		Purchase Price	Sell Price

		Purchased From	Sold To
		Comments	Comments

Toolbar Options



Note: All of these options are also available from the menu and most of them have keyboard shortcuts.

1	Show the coin record for the selected entry in the main EzCoin window.
2	Transfer the bookmarked coins (or all coins if none are marked) to a navigation list in the main EzCoin window.
3	Add a new record to the list.
4	Remove marked or selected records from the list. If you choose to bookmark records in the list, then they will take precedence over selected records.
5	Edit the selected record.
6	Export the list to file.
7	Import the list from file.
8	Bookmark the selected records. Hold down Ctrl to bookmark all records.
9	Delete selected records. Hold down Ctrl to invert the bookmarks. Note: You will not be able to undo the deletion once confirmed.
A	Clear the bookmarks.
B	Close the window.

Adding and Editing Records

When you choose to add or edit a record in the list, you will be provided with a dialog window like the one for Purchase History as shown below.

Add to Purchase History

Denomination: 1 Cent Year: 1859

Type/Reign: Victoria, Laureate

Variety: Wide 9 Over 8

Mint Mark: <Blank> Search...

Quantity: 1 Purchase Price: \$113.55

Purchase Date: 2009/6/8 ... Coins: 1

Purchased From: Canada Post

Comments:

Any/Unknown Grade Grades... **Set Grade: G-4** OK Cancel

The 5 key fields shown represent the coin record which the list item is associated with. Unlike editing from the main EzCoin window, this dialog allows you to reassign a list record from one coin to different coin. This is faster than deleting a PWL record from Coin A, and then adding the PWL record to Coin B.

Since you must know the key field value and it must match exactly to a unique coin record (the "Coins" label with the white background must be "1"), the **Search** button has been provided. It will allow you to access the Coin Drilldown feature to locate the record you want. If you have no intention of moving a record to another coin, then leave these 5 drop down values as is.

You can change any of the other fields related to the list type in this dialog using the drop down lists or text input fields. You can erase comments or other text fields from the list item by simply deleting the text.

The grade list on the left is used to select a new grade for existing records, or add a new grade. Use the **Grades** button to create a subset of the available grades in this list. Use the **Any/Unknown Grade** button to assign the grade value of "Any Grade" to the record. Otherwise, click on **OK** to assign the selected grade in the list. The selected grade will always appear between the Grades and OK button for reference.

Exporting and Importing Lists

You can save the complete list to a text file for review or further edits. A text file can also be imported. Export and import options are advanced features and should only be used if you are comfortable with working with tab-delimited text files in programs such as Microsoft Excel.

The export/import format is very specific and can't be changed.

Along with the 5 key fields, the remaining columns exported are based on the type of list. The first row contains the exported field names, and must not be changed or omitted if you intend to import the file.

The file format saved uses UTF-8 encoding. This allows preservation of special symbols, characters with accents and international characters.

When importing the data back into EzCoin, the file format can be plain text, UTF-8, or Unicode, but must still be tab-delimited and have the same column arrangement. If EzCoin can't match the 5 key fields in the import file to an existing coin record for the country, the import record will be skipped. EzCoin will validate the contents of the file before starting an import. If there are any errors, you will need to fix them before proceeding.

Pricing Locks

Pricing locks are provided to prevent EzCoin supplied data updates from affecting current pre-supplied market values associated with coin grades. Once a record has its pricing locked, any supplied data updates you make will be prevented from changing the current price values. You can lock or unlock prices using any of the following methods:

- Click the padlock icon at the bottom of EzCoin window in the status bar. When the icon is grayed out, there is no price lock on the record. When the icon is green, a price lock is applied to the coin record.
- Choose the Lock Pricing option from the Edit menu to lock or unlock pricing. Use the Unlock All Pricing option to remove the locks from every record in the country file.
- Pricing locks are enabled through similar menu options in the report viewer. If you want to determine what records currently have price locks, run a Power Search in which the matching conditions are set to all inventoried records with *Price Lock = Yes*.

Notes: Price locks have no effect on custom countries or records which are custom varieties. In addition, price locks can't be set for any pre-supplied record which is not part of your inventory.

Rapid Multi Entry

Rapid Multi Entry (RME) provides a method to quickly add multiple coin records to your inventory using a combination of search conditions and selecting records from the Report Viewer window to add. Note that the RME option is not useable for custom countries, as every coin record will already be part of your inventory.

Setting the Search Conditions

Select the Rapid Multi Entry option from the Edit menu and you will be provided with a dialog window to set the search conditions to find matching coin records.

The screenshot shows the 'Rapid Multi Entry' dialog box. It has a title bar with standard window controls. The main area contains several fields and checkboxes. At the top, 'Search In:' is set to 'Supplied (Not Inventoried)' with a dropdown arrow. To its right is a checked checkbox 'Use the sort order in the report profile'. Below 'Search In:', 'Duplicates:' is set to 'All Entries' with a dropdown arrow. To its right is an unchecked checkbox 'Main numbers only'. Below 'Duplicates:', 'Filter Method:' is set to 'Coin Record Key Fields' with a dropdown arrow. A section titled 'Key Search Conditions:' contains four fields: 'Denomination:' set to '25 Cents', 'Year:' set to '1920' followed by 'to' and '1944', 'Type/Reign:', and 'Variety:'. Below these are 'Mint Mark:' and two checkboxes: 'Case-Sensitive' (unchecked) and 'Exact Match' (checked). At the bottom of the main area, 'Report Profile:' is set to 'Rapid Multi Entry (RME)' with a dropdown arrow. Below the main area are four buttons: 'Reset', 'Sort Order...', 'Find', and 'RME'. At the very bottom, a status bar shows 'Matches: 0'.

The **Search In** drop down list will contain one of 2 choices. The second choice, supplied data, will allow you to run an RME search against pre-supplied coins which may already be in your inventory. This allows for creation of duplicate coin records.

The **Duplicates** drop down indicates how to match based on duplicate coin record status.

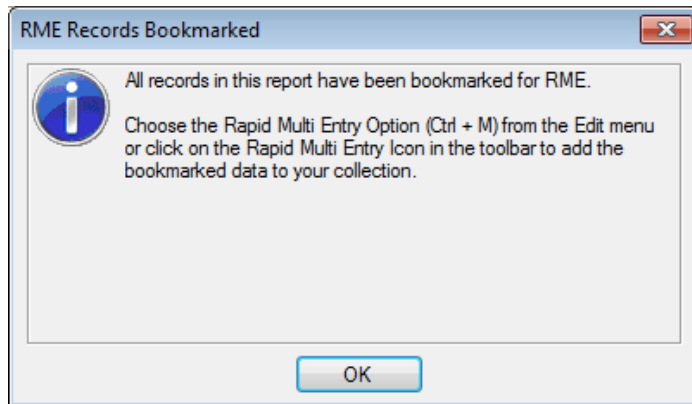
The **Filter Method** changes the primary search conditions. Aside from the default primary coin fields, alternate catalog ID values can be used to define a range of coin records.

The checkbox option for *report profile sort order* can be disabled, allowing you to click on the Sort Order button to define a different order for the report presentation. This doesn't affect the way records are added via RME.

Pre-supplied coin records have an internal status to indicate if a coin is a main variety or a sub-variety. Check the *Main numbers only* option to exclude all sub-varieties.

Every search and report option in EzCoin requires a reporting profile to define how the search results are displayed in the report viewer. The RME option is no exception - use the dropdown list to select a different profile if the default pre-supplied version is not sufficient for your needs.

Click on the **Find** button to start searching the country file for matching records. If any matches are found, you will be able to click on the **RME** button. This will present the search results in the Report Viewer. In addition, the report viewer will detect that this is an RME request, and will automatically bookmark the records in data grid and enable the RME option.



Once in the report viewer, click on the RME button to add the coin records to your inventory.

Quick Duplicate

EzCoin provides a method to quickly make copies of inventoried coin records, using an interactive dialog based on the Rapid Multi Entry (RME) system. This option is available under the **Edit** menu as **Quick Duplicate**.

The left side of this window contains the available grades for the current country file with an associated quantity field for each grade. If you check a grade, the quantity will be set to 1 for you.

Use the **Grade Select** button to check multiple grades using the standard grade group selection window.

The **Custom Fields** button will display a window allowing you to add custom field values to duplicate record.

The **Clear** button will uncheck all grades in the grade list. **Clear All** will erase the contents of all fields in this window.

The current coin displayed in the main EzCoin window is always the source for the duplication.

The duplicate is done exactly one time when you click on the **Duplicate** button. The dialog will remain open until you click on Exit, *unless* you don't have an active navigation list. In this case, the window will close after the duplication.

Any existing inventoried information will be discarded in the copy, and will be replaced by the information contained in the window above. As such, quick duplicate has no provision to *add* to the existing data, which the RME system does provide for.

Pre-supplied coin records which have not been added to your inventory will not be duplicated, unless the auto inventory option is enabled.

Duplication by Navigation List

Quick Duplicate is designed to work efficiently using the active navigation list. Use any search or report to create a navigation list and then run the quick duplicate option. When you do this, the Quick Dup window will display violet arrow buttons, which mimic the behavior of the main toolbar buttons, allowing you to step back and forth between coin records in the navigation list.

In addition the Auto Step checkbox will be enabled. When you check this option, a click on the Duplicate button will advance automatically to the next coin record in the navigation list – the main window will refresh automatically with the new record.

Auto Inventory Mode

This checkbox option acts as a safety feature, preventing you from accidentally adding a non-inventoried pre-supplied record. With this option enabled, any non-inventoried coin record will be inventoried (only 1 copy will exist after this). The **Duplicate** button will change to **Inventory** in these cases.

Automatic Settings

When you close the quick duplicate window, all settings are saved and restored exactly as before the next time you run this option. Use the **Clear** and **Clear All** buttons to reset these settings.

Primary vs. Grade Information

Some of the field data is associated with the coin record (Main Location and Coin Record Comments). The remainder is associated with each grade. When you enter values into the grade-level fields, the same value (i.e. Purchased From) is applied to all grades selected in the checkbox list. If you need to add different values for different grades on the same coin record, then you will need to make changes to the checkbox selection list for the same coin record.

Bullion Value Grades

The checkbox option named **Bullion Value** is used to add grades as bullion values, ignoring the market value when determining the coin grade's net value.

Image Links

Each coin record can have primary and alternate obverse/reverse image assigned to them. Image data is not stored in the country file - only a link to it is stored, which is essentially the file name without an extension or a reference to any specific path or disk drive. EzCoin will not store a file extension with the link name, to allow

you to change the file format at any time (i.e. BMP to JPEG) without the need to update the link information.

Image File Formats and Locations

EzCoin will accept image files using the following formats and their associated file extensions (extensions are not case-sensitive):

Image Type	Valid Extensions
Bitmap Files	.BMP
JPEG Files	.JPG, .JPEG or .JPE
TIFF Files	.TIF or .TIFF
GIF Files	.GIF
PNG Files	.PNG

Image links do not have a path name component. For example, D:\MyImages\myimage.bmp is not a valid link. How images are located by EzCoin is based on the following search priority:

1. EzCoin Application Path (Under the Images\Country folder)
2. Alternate Image Path (Under the Country folder), which must be defined in the EzCoin general preferences.
3. EzCoin pre-supplied image library file (.IMG) located under the application path Images folder (i.e. Images\Canada.img).
4. EzCoin distribution disc as an image library file.

The country folder is always the parent for all image files.

Under the country folder, there will be 2 subfolders named **Main** and **Alt** for the primary and alternate images respectively.

Obverse and reverse image files share the same folder space, so you will not be able to have a reverse image file with the same name as the obverse image for a given coin record.

Pre-supplied images are always provided as image library files with an extension of .IMG. Every image is contained in a single file, and it may reside on the distribution disc or under the Images folder of the EzCoin installation path.

For example, if you have obverse and reverse images of 1959_1c_o.jpg and 1959_1c_r.jpg, for Canada and have installed EzCoin to C:\SoftPro2010\EzCoin2, the images would both be located in:

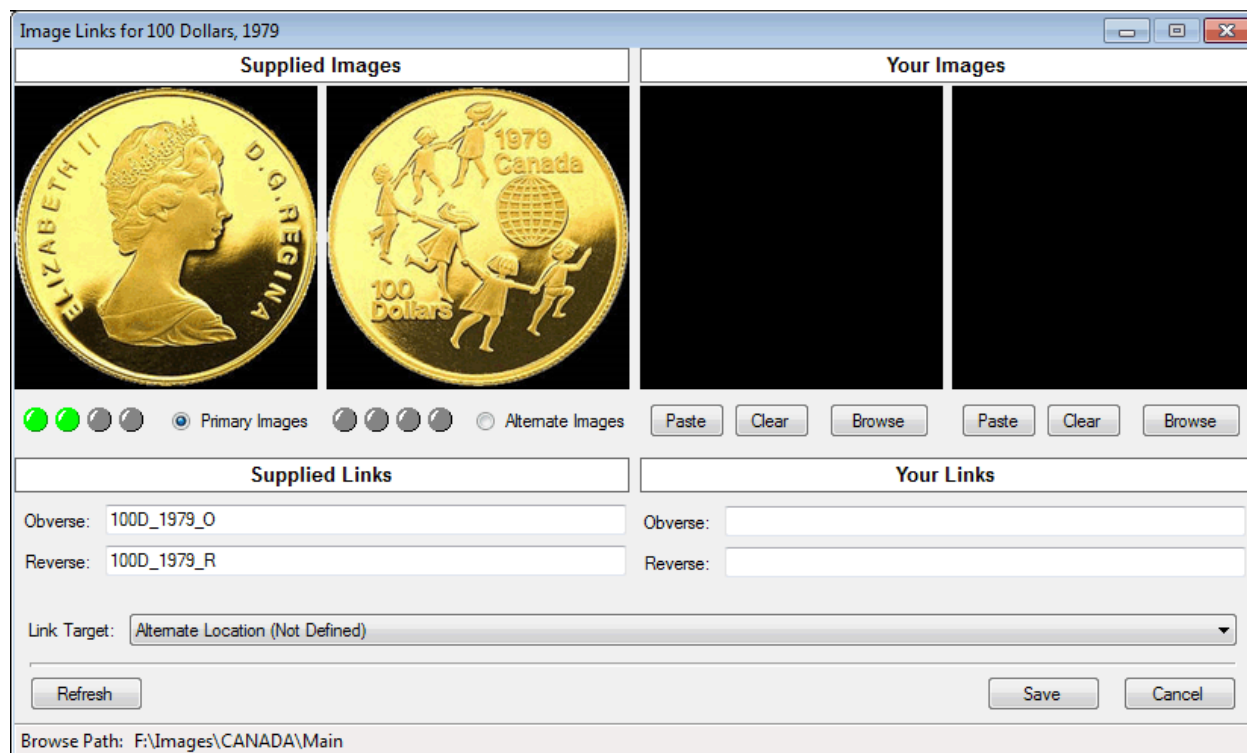
C:\SoftPro2010\EzCoin2\Images\Canada\Main

If these were alternate image links, they would be located in

C:\SoftPro2010\EzCoin2\Images\Canada\Alt

Image Link Editor

This editor is available by right clicking either image in the main EzCoin window, by clicking the image link button in the main toolbar, or choosing the image link editor from the **Quick Edit** submenu under the **Edit** menu.



The left image pair is for pre-supplied image images. The right side pair is for custom image links you provide. A custom country will never have images displayed on the left side of this window.

Images are assigned individually, not in pairs. It's perfectly acceptable to only assign a reverse or obverse image for a coin record. The 4 leftmost colored globe icons (green or gray) indicate the active link status for the primary images. The 4 icons on the right side represent the link status for alternate images.

If the icon is green, it indicates an active link is assigned, even if the image is unavailable. If the icon is gray, then no image link is assigned. The 4 icons to the left of the Primary Images radio button indicate link status in this order (left to right):

- Obverse Image, Pre-supplied
- Reverse Image, Pre-supplied
- Obverse Image, Your Link

- Reverse Image, Your Link

The 4 icons to the left of the Alternate Images radio button indicate similar link status for the alternate images.

Below the status icons are the actual link file names, which are limited to 64 characters in length. The extension will not be shown in the link name, as EzCoin resolves the image based on all possible matching file types and their standard extension names.

The left side contains the pre-supplied link file names, with your custom link names on the right side.

Changing Image Links

You can assign links by:

- Enter a file name directly in the input field. For this option to work, you must have already placed the correct image in the image folder on your own. You must click the **Refresh** button to validate the image link and display it.
- Use the **Browse** buttons to locate an image using the Image Browser window.
- Paste an image from the Windows clipboard using the **Paste** button.

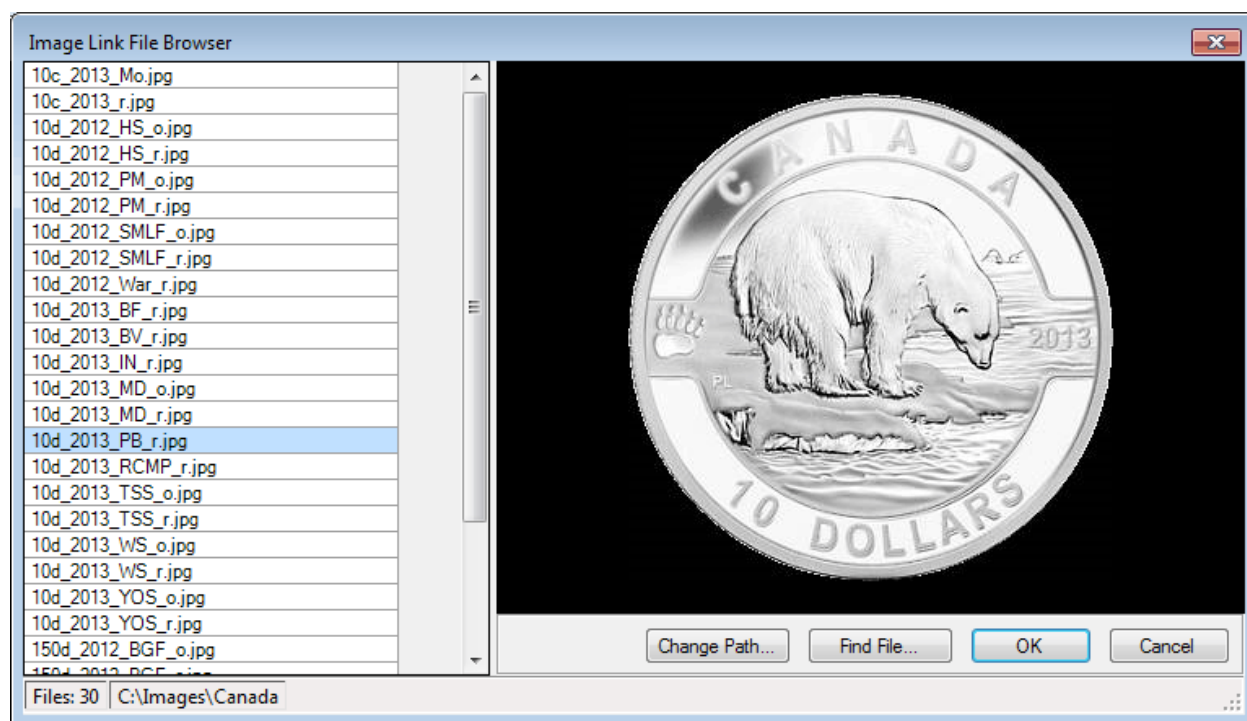
Link Targets and Image Files

The dropdown list will have 2 possible locations to place image files: the application installation path and an alternate image location. The alternate image location is specified under the EzCoin generate preferences, and allows you to pick any location outside of the EzCoin application folder, as long as it follows the same subfolder organization (country\main or country\alt).

If image files are obtained from a different location using the browser, a copy of the file will be placed into the folder defined under the Link Target path. The original file will remain where it was copied from.

Image Browser

When clicking on the **Browse** buttons, a simple image browsing window will be displayed.



The window will show list of available image files for the current browse path on the left, and the selected image on the right.

The total number of files and current browse path are displayed in the status bar.

Click on the **Change Path** button to select a different browse path.

Click on **Find File** to look for a specific file. If you choose a file using this method, the browse path will be set to the location where the file resides.

Click **OK** to assign the image as a new link. If the file needs to be copied to the correct target link path, it will be done at this time.

Primary vs. Alternate Images

Use the 2 radio buttons to change between the primary and alternate image links.

When alternate image links are present, a special alternate image icon will appear in the toolbar of the main EzCoin window, allowing you to view the alternate images.

Pasting an Image from the Clipboard

If you have a valid image in the Windows clipboard, you can click the **Paste** button to place the image into the link window. The file will be saved using the format defined under the EzCoin general preferences (Clipboard Save Format, can be JPEG, TIFF, PNG or BMP).

You will have to provide a valid file name for this image.

Clearing Image Links

Click on the **Clear** button to remove a custom image link. **Note:** You are not permitted to clear supplied image links. EzCoin ensures that your custom image link has higher priority than a pre-supplied link. Once you remove a custom link, the original pre-supplied image will be used instead. Only the link reference is removed - the image files are left as is.

Pre-Supplied Refresh and Duplicate Coins

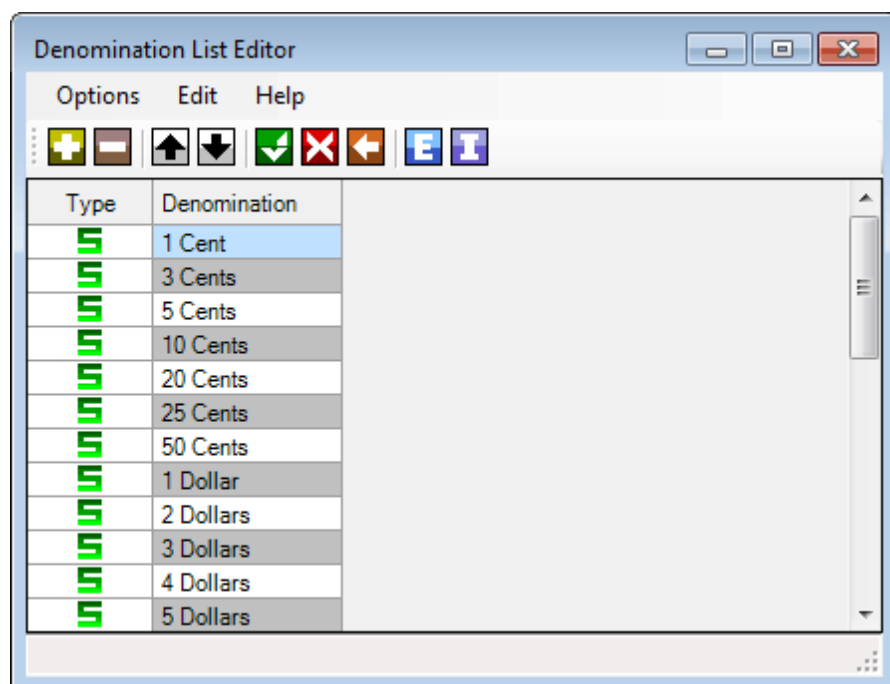
If you have a duplicate coin record, EzCoin will disconnect pre-supplied coin information from the record. It will copy the pre-supplied information over before creating the duplicate copy, but thereafter the duplicate image will no longer be subject to pre-supplied data updates from SoftPro. For this reason, an option to refresh a pre-supplied image link for duplicate coins has been added. This button is named **Pre-Supplied** and will only appear for duplicate coin records. Click this button and pre-supplied image links will be applied to any image where a custom link is not already assigned.

Customizing Denominations

Denominations are assigned on a per country basis. You are permitted to have denominations which are not assigned to any existing coin record (i.e. the list can be larger than what's being used).

Denomination lists also can be arranged in any order you prefer, and EzCoin will ensure that when used in reports and navigating through records, the denominations will be presented in the order you expect.

To access the current denomination list for a country, use the **Denominations** item from the **List Editor** submenu under the **Utility** menu.



Supplied and User Denominations

The icon in the list will either show a green S (Supplied) or a red U (User). Pre-supplied denominations are provided by SoftPro and can't be removed or renamed. User denominations are custom values which you added to the country. They can be renamed, but not removed if they are currently used by one or more coin records.

Editor Options



1.	Click on this button to add a new custom denomination to the end of the list.
2.	Click on this button to remove the selected denomination.
3.	Use the up and down buttons to move the selected denominations up and down within the list. The order of denominations in this list is the sort order used for reports and navigation. Hold down the Ctrl key while clicking to move the selection to the beginning or end of the list.

4.	Click this button to save all changes in the list. If you reordered the denominations, EzCoin will need to update all coin records to adjust their sort order.
5.	Click this button to cancel and discard all changes.
6.	Click this button to undo any changes and start the edit session anew.
7.	Use the export option to save the list to a custom denomination file with an extension of .DEN. These files can be used when creating new custom countries, or as a backup source for restoration.
8.	Use the import option to load denominations from an export file.

Restoring Denominations From Coin Records

Use the **Restore Denominations** item from the **Options** menu to have EzCoin search every coin record in the country file and add in any missing denominations. This normally should not happen, and is provided only as a data integrity recovery option.

Pre-Supplied Data Comparison

The **Supplied Data/Differences** option under the **Edit** menu provides a quick method to preview, modify and compare all fields for a coin record which can be pre-supplied by SoftPro. Even if the record has no pre-supplied data, you can still use this option to view all the pre-supplied fields at a glance (in which case these fields are all customized values).

Supplied/Coin Details for 1 Cent - 1884 - Victoria, Diadem, Large Leaves

Description:	Large Cents, Dominion of Canada			
Diameter:	25.4 mm	Weight:	5.67	Grams
Thickness:	2.33 mm	Edge:	Plain	
PM Composition:	Silver: <input type="text"/> %	Gold: <input type="text"/> %	Platinum: <input type="text"/> %	Palladium: <input type="text"/> %
Composition:	95.5% Copper, 3% Tin, 1.5% Zinc			
Period:	1884-1891	Mint Loc.:	London	
Mintage:	2,500,000	Proof Mintage:	<input type="text"/>	Coin Qty for Sets: 1
Designer:	Leonard C. Wyon			

Description:	Large Cents, Dominion of Canada			
Diameter:	25.4 mm	Weight:	5.67	Grams
Thickness:	<input type="text"/>	Edge:	Plain	
PM Composition:	Silver: <input type="text"/> %	Gold: <input type="text"/> %	Platinum: <input type="text"/> %	Palladium: <input type="text"/> %
Composition:	95.5% Copper, 3% Tin, 1.5% Zinc			
Period:	1884-1891	Mint Loc.:	London	
Mintage:	2,500,000	Proof Mintage:	<input type="text"/>	Coin Qty for Sets: 1
Designer:	Leonard C. Wyon			

Restore All Restore Current Save Cancel

Press F5, double click a field label, or click the Restore Current button to reset a single field to the supplied value.

When editing pre-supplied fields in the main EzCoin window, you may notice the background and foreground colors of a field may change. This indicates that you have modified a field to have a different value then what has been pre-supplied by SoftPro.

This dialog window shows the same color coding on any field where you have changed the value from a pre-supplied version. This can also be reflected in any supplied data updates when you have elected NOT to apply the changes.

The pre-supplied values are shown in the bottom half of the window. Your copies of these field values are displayed in the top half. For custom variety coin records, or for a custom country file, the bottom half of this window will not be shown, in which case the dialog window acts as a general purpose coin attribute editor.

Use the **Restore Current** button to reset a value for any field which the I-beam edit cursor is currently positioned in. You can also double click any field label to reset the value, or click on the **Restore All** button to change all fields to their pre-supplied values.

Click on **Save** to apply the changes. This will not save the coin record changes to the country file – you still need to click on the blue checkmark button in the main EzCoin window to commit the changes.

Renaming Key Fields

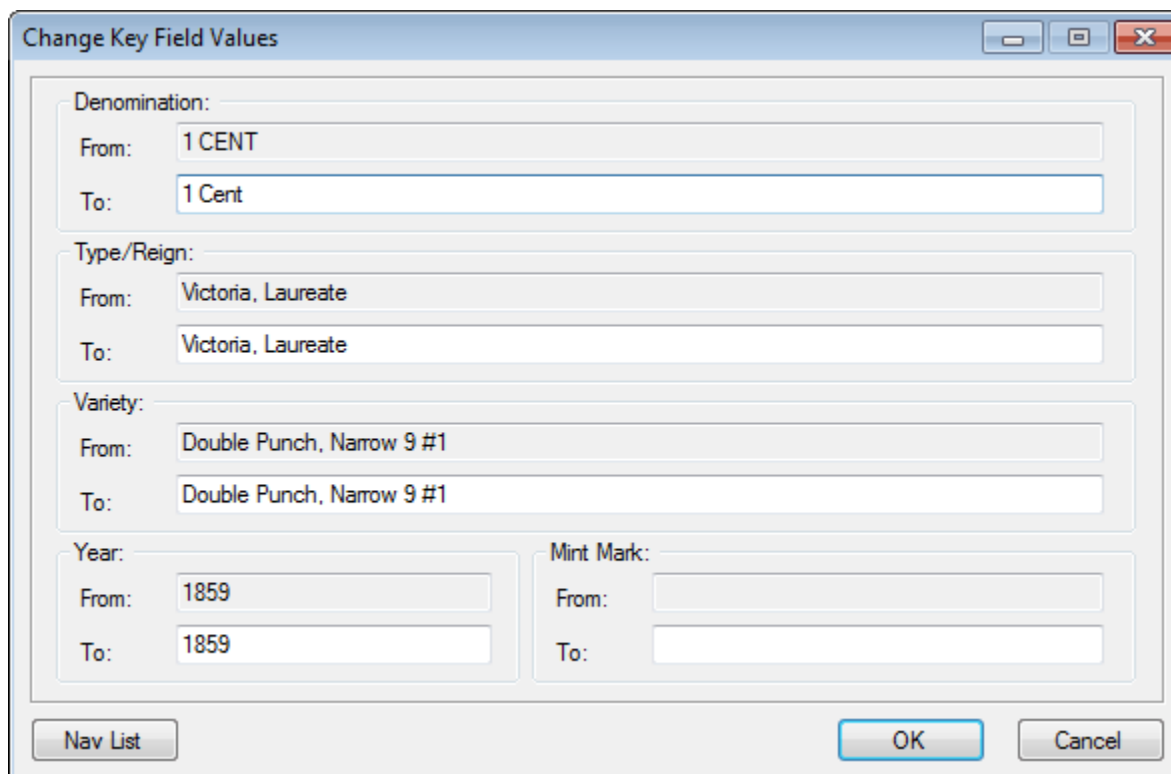
Records in EzCoin are uniquely identified by 5 key fields:

- Denomination
- Year
- Type/Reign
- Variety
- Mint Mark

The combination of these fields (only denomination is mandatory of the 5) must be unique for coin identity. Duplicate coin records are not considered as a separate coin identity based on this definition.

Pre-supplied coin records from SoftPro are not allowed to be changed, to avoid any issues with supplied pricing or data updates.

For any custom variety coin record, or for any coin record which is part of a custom country (i.e. no pre-supplied data whatsoever), you can change the 5 key fields using the **Change Key Fields** option in the **Edit** menu.



The image shows a Windows-style dialog box titled "Change Key Field Values". It contains five sections for editing coin fields, each with "From:" and "To:" text boxes. The "Denomination" section shows "1 CENT" being changed to "1 Cent". The "Type/Reign" section shows "Victoria, Laureate" being changed to "Victoria, Laureate". The "Variety" section shows "Double Punch, Narrow 9 #1" being changed to "Double Punch, Narrow 9 #1". The "Year" section shows "1859" being changed to "1859". The "Mint Mark" section shows empty "From:" and "To:" boxes. At the bottom left is a "Nav List" button, and at the bottom right are "OK" and "Cancel" buttons.

Field	From	To
Denomination	1 CENT	1 Cent
Type/Reign	Victoria, Laureate	Victoria, Laureate
Variety	Double Punch, Narrow 9 #1	Double Punch, Narrow 9 #1
Year	1859	1859
Mint Mark		

Before this dialog is shown, EzCoin will ensure that the current coin record on the main application screen doesn't have any pending changes which haven't been

saved to the country file. If changes are pending, make sure to save them first (blue checkmark button).

You may change any of the 5 fields for a custom coin record. Spelling is case-sensitive. Denomination may not be blank, but the other 4 fields can be.

When you click the **OK** button, EzCoin will check for any existing coin record matching on the new combination of the 5 fields. Matching conditions can be on:

- One or more inventoried coin records on the new key values.
- One or more coin records in the Priority Want or Sell list.
- One or more coin records in the Purchase or Sell history.

If a conflict should occur with existing coin data, you will be given a confirmation warning dialog to proceed. Be aware that if you do proceed, the existing coin information will be replaced with the current coin data shown in the main EzCoin window.

This replacement extends to all duplicate coin records as well. If there are 3 duplicate coin records all on the key fields you are changing to, then all 3 coin records will be erased and replaced with the coin records based on the original key field values. You will not be able to undo this option without a backup if you choose to proceed.

A special button named **Nav List** can be used to show the conflicting and source coin records in the main EzCoin window as a navigation list. Use the violet arrow buttons to navigation between the coin records to verify what information you could be potentially replacing.

Once the key fields are renamed, EzCoin may perform a report totals recalculation automatically, for any cases where target coin information was replaced with the source coin records.

EzCoin Searches and Reports

The Search and Reports menus contain items which collectively perform the common task of finding coin information and showing the results of the search in various ways. The division of the searches and reports into separate menus in EzCoin is based upon frequency and ease of use. The search menu contains several advanced options, and the reports menu contains the most common report types in EzCoin.

All of the items with the exception of eLook, EzBrowse, and EzInventory will perform searches/reports using the same 3-step process:

- Display a dialog with search conditions and reporting options, which you provide.
- Find matching coin records against the current open country file using the search conditions.
- Show the results using the output method you specify, the default being a spreadsheet-style report window.

Search Conditions Dialog

Searches and reports start with the search conditions dialog window. Each search or report may use slightly different types of windows, but they will all share the following features. The Basic Inventory Report's search dialog is used as an example.

Note that items 1, 2, 3 and 6 as described in the table below work together to create a unique filter that limits the number of coin records that will be searched.

The screenshot shows the 'Basic Inventory Report' dialog box. It contains several input fields and options, each labeled with a blue number:

- 1**: Search In: Inventoried Data (dropdown)
- 2**: Duplicates: All Entries (dropdown)
- 3**: Filter Method: User Cat 1 # (dropdown)
- 4**: A group of radio buttons for display options:
 - 1: Show in Spread Sheet Viewer (selected)
 - 2: Show in Data Browser
 - 3: Show in Thumbnail Viewer
 - 4: Save as a Navigation List
 - 5: Show in Main Window
- 5**: ☒ Use the sort order in the report profile
- 6**: ☐ Main numbers only
- 3**: Search Range Conditions section:
 - Exact Match (selected), Partial ID Match, From-To Range
 - Match Value: EF-40
 - Clear IDs button
- 7**: Report Profile: Basic Inventory Report (dropdown)
- 8**: Reset button
- 5**: Sort Order... button
- 9**: Find button
- 10**: Show button
- 11**: Matches: 0 (status bar)
- Cancel** button

1	<p>This sets the type of data to search at the highest level. This is the first step in determining what records to find. Depending on the search and the type of country file (i.e. custom vs. pre-supplied from SoftPro), not all of the choices listed below will be available.</p> <ul style="list-style-type: none"> • All Coins: Every record in the country will be searched. • Inventoried Data: Only records which are part of your inventory are considered. • Modified Supplied Data: Only records where pre-supplied fields have been modified from what they were when provided by SoftPro. • All Customized Data: Custom varieties in addition to modified pre-supplied data. • Custom Varieties: Records which are not pre-supplied by SoftPro. • Supplied Data: Records which are only supplied by SoftPro. • Supplied (Not Inventoried): Records which are supplied by SoftPro but have yet to be added to your inventory.
2	<p>Every coin is uniquely identified by the combination of Denomination, Year, Type/Reign, Variety and Mint Mark. You can create copies of coin records and retain the same 5 key fields, in which case they are considered duplicate records. Duplicate records don't have to share any common attributes other</p>

	<p>than these 5 key fields. This drop down list determines how to handle duplicate coin records in searches.</p> <ul style="list-style-type: none"> • All Entries: All duplicate coin records are included in the search. • Ignore Duplicates: Duplicate coin records are skipped. Only the primary (first occurrence) of the coin record based on the 5 key fields is included. • Only Show Duplicates: The primary coin records are skipped. This type of search is specifically targeted at duplicate records only.
3	<p>The filter method represents a choice from 2 or more ways to find coin records using the primary attributes of coin identity:</p> <ul style="list-style-type: none"> • All Coins: With this option, all coins are searched (in combination with your choices for 1 and 2 above), with the addition of specifying the time you last updated coin information. • Coin Record Key Fields: The 5 key fields for a coin record can be searched using partial or exact match conditions. • Unique Identifier: The UID value can be searched using a range, partial or exact match condition. • Alternate and Pre-supplied Catalog ID: Any pre-supplied or custom catalog ID values can be searched using a range, partial or exact match condition.
4	<p>There are 6 ways to show the results of a search (the 6th choice is available from the Spreadsheet Viewer only).</p> <ul style="list-style-type: none"> • Report Viewer: This shows the coin records in a spreadsheet style window, with full editing and printing capabilities. • Data Browser: This is similar to the spreadsheet viewer, except that the data is presented in a read-only format, similar to the EzCoin version 1 reports. Unlike the spreadsheet viewer, the data browser offers unrestricted column sorting. • Thumbnail Viewer: Displays the coin records in the thumbnail window as a set of image pairs. • Navigation List: Assigns all of the coin records to the navigation list. • Main Window: The results are shown one record at a time in the main EzCoin window. The status bar of the search window will expand to offer some navigation options in this mode. • Coin List Viewer: If you choose the spreadsheet viewer, it will contain a menu option (press F8) to transfer the report to the Coin List viewer.
5	<p>Each report profile contains a default sort order for the coin records. You can change the sort order using the Report Profile Editor, or as a convenience, change it on the fly from the search window. Uncheck this option and the</p>

	Sort Order button will be enabled, allowing you to set a new ordering for the coin records.
6	Pre-supplied coin records from SoftPro can be classified as a main variety or a sub-variety. Use this checkbox option to skip sub-varieties.
7	<p>Every search and report must be assigned a report profile, which is a file-based template containing settings for displayed and printed reports. The primary components of a profile are the list of coin fields to display/print, colors for displayed reports, and the format settings for printed output.</p> <p>Each search and report in EzCoin is assigned a default profile. You can add custom report profiles based on any existing report profile, or create new profiles from scratch. These custom profiles will appear in the drop down list. SoftPro may also provide additional "stock" profiles for a report type, and they would also appear in this drop down.</p>
8	Most searches and reports will retain their dialog settings from the previous search. You can reset all of the search conditions to default/empty values by clicking on the Reset button.
9	Before you can show the results of a search, you need to initiate it by clicking on the Find button. The total number of matching coin records will be displayed in the status bar. Until at least one matching coin record is found, the Show button will not be enabled.
10	Click this button to show the results based on the output method chosen as per item 4 above.
11	In addition to showing match results, the status bar provides feedback on the search while in progress and navigation options for Main Window browse mode.

Main Window Browse Mode

If you want to see the search results one record at a time on the main EzCoin window, choose the **Show in Main Window** output mode. The status bar will appear like below after clicking the Find button.



1	Click this icon to minimize the search dialog window, allowing you to see more of the main EzCoin window. Click it again to restore the search window.
2	Total number of matching coin records from the search.

3	Click either arrow to move backwards and forwards between the matching coin records. As you click the icons, the coin record in the main EzCoin window will be updated accordingly. Hold down Ctrl while clicking to move to the first/last coin record.
4	This is the current record shown in the main window. It will be between 1 and the total number of matches.

Coin Modification Dates and Unfiltered Mode

You will have the option to set a start and end date based on the date when you last updated any changes for a coin to your inventory. If you don't specify an end date, then all records modified from the start date to the current date will be included.

Key Field Search Mode

You can enter a value for one or more of the 5 key coin fields (Denomination, Year, Type/Reign, Variety, Mint Mark) in this mode, using complete or partial search values.

For a partial match, ensure that the **Exact Match** option is unchecked.

To make sure your searches are not case-sensitive, ensure that the **Case-Sensitive** option is unchecked.

The year range can have a starting value, but doesn't require an ending value.

Catalog ID and UID Search Modes

You can choose to search based on exact match, partial match, or using a range of values.

Note that when choosing a range, the ending value is pre-populated with a string of "Z" characters equal to the maximum length of the field (i.e. UID will be a string of 16 Z characters). This is done to ensure that the ending value will in fact encompass all coin records by default.

Catalog and UID matching modes will not pick up any coin record where there is no ID/UID value assigned. The only way to find coin records with missing UID/ID values is via Power Search.

All ID and UID matches are always case-sensitive.

Search Menu Items

The following table summarizes all of the items under the Search menu. Click on any of the links in this table to see additional information.

Key Search	Find coin records using a combination of primary 5 key fields (Denomination, Year, Type/Reign, Variety and Mint Mark).
Attribute Search	Find records based on the physical characteristics of diameter, thickness, and edge.
Composition Search	Find records based on the composition and weight, including special conditions for precious metal content.
Mint Details Search	Find records based on mint location, mintage and proof mintage.
Period Search	Find records based on the period of issue.
Designer Search	Find records based on the designer of the coin.
Notes / Description Search	Coin records can contain notes or descriptive comments, which are generally pre-supplied by SoftPro.
Location Search	Find records based on the primary coin location or on the individual location values at the grade level. SoftPro does not provide location information.
Serial Number Search	Find records based on the serial number. SoftPro does not provide serial number information.
Comments Search	Find records based on the primary coin comments or on the individual comments at the grade level. SoftPro does not provide this information.
Custom Field Search	You can add extra fields to a country file to store any data of your choosing, within the restrictions of the data types for a custom field format. Custom field searches find coins for a specific custom field value.
EzBrowse	These searches are basic at-a-glance type reports of either pre-supplied or inventoried coin information.
Power Search	This search type allows for complex data matching for almost every possible coin attribute. If other searches or reports can't find what you're looking for, Power Search likely will.
Grades Search	EzCoin can contain many attributes tied to each grade you add to a coin's inventory. The grade search takes this into account, allowing you to find records at the grade level, rather than at the coin level. Unlike the grades report, the grades search presents grade information vertically down the page, making more efficient use of space when many grade attributes are

	selected in the report profile.
Supplied Price Search	Coin pricing is based on the market value assigned to each grade for each coin. As pricing is based on what market values are available, not every grade for every coin will have a value. This search option will allow you to locate coins based on their market values.
Change History	When you make updates to a coin record, EzCoin will keep track of when changes were made to that record. The change history search will locate coin records which have been modified recently or over a period of time.
eLook™	This search system will check eBay™ for coin information using the same search system provided with EzCoin version 1.

Report Menu Items

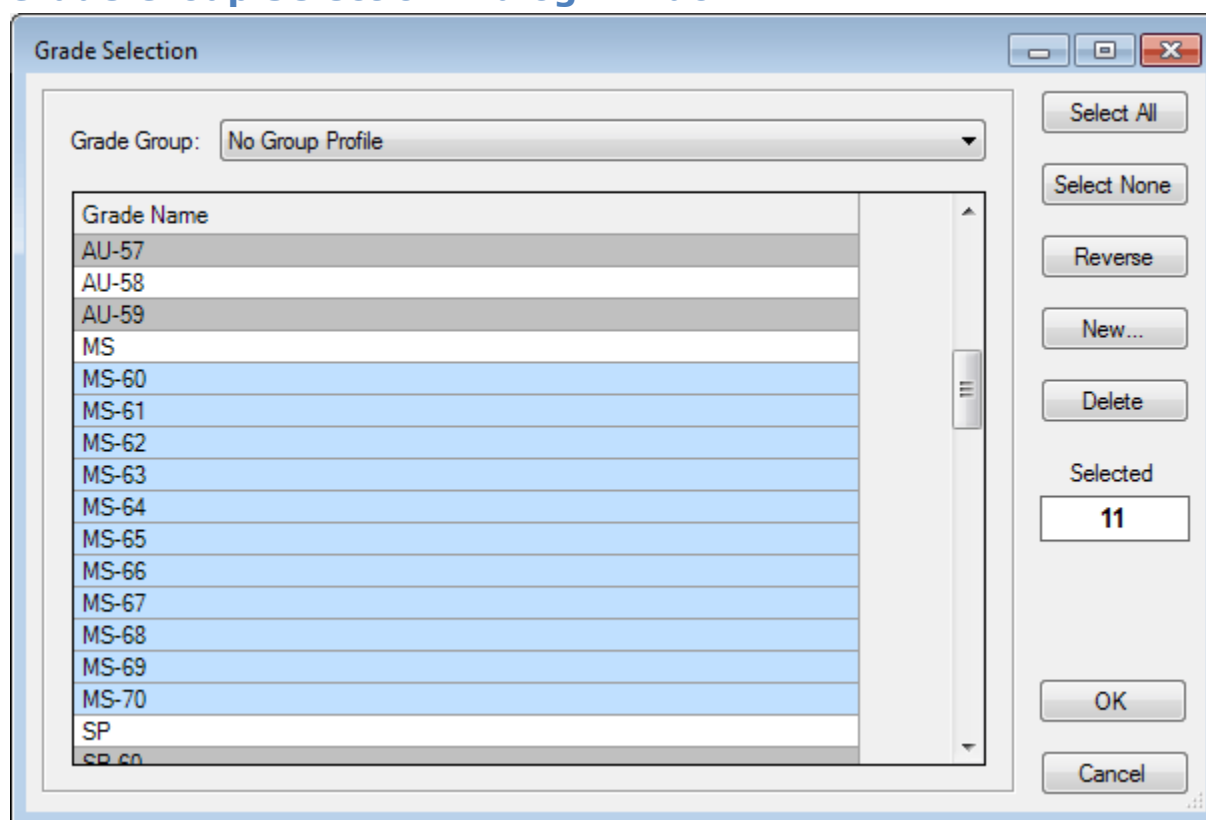
The following table summarizes all of the items under the Reports menu, excluding the report profile editor and customized report assignments.

Click on any of the links in this table to see additional information.

Basic Reports	Provides basic information for records in your inventory. This report closely resembles the one from EzCoin version 1.
Detailed Reports	Same as basic, but adds many more fields of information, including grade details.
Comments Report	Provides a specialized report to efficiently show coin records containing extended text comments.
Cross Reference Report	Provides catalog ID/location cross reference information.
Quick Stats Report	Quick stats reports represent your 3 most common report templates in EzCoin. Although SoftPro provides 3 default quick stats report profiles, you can replace them with your 3 favorite templates.
Priority Want List	This report shows all coins you have added to the PWL.
Priority Sell List	This report shows all coins you have added to the PSL.
Want List Report	This is a basic report which includes all pre-supplied coin records which haven't been added to your inventory. For custom country files, this report isn't

	used.
Grade Details Report	A grade details report is similar to a grades search, except that the grades report mimic the old EzCoin version 1 behavior, in that the grade information is displayed left to right across the report.
Purchase History Report	A purchase history report tracks all coin purchases independent of your inventory. Unlike normal inventoried grades, the purchase/sell history can include multiple sales and purchases for a given coin based on denomination, year, type/reign, variety and mint mark.
Sell History Report	A sell history report tracks all coin sales made. Unlike EzCoin version 1, purchase/sell history is not part of your inventoried coin record information.
Coin Information	This report provides all of the pre-supplied coin attributes.
Customizations Report	This report type includes coin attributes which you have modified to be different from pre-supplied values from SoftPro. This report can also be used for custom varieties. The report isn't available for custom countries.
Navigation List Report	The active navigation list can be viewed as an ad-hoc report, by choosing any available report profile, and then displaying the results in the spreadsheet viewer.
Grand Totals Report	If you have multiple countries in use with EzCoin, you can get summary reports for all of the country files together in a single view.

Grade Group Selection Dialog Window



The grade selection window allows you to quickly choose specific grades from those available in the current country, including pre-supplied grades and custom grades which you can create.

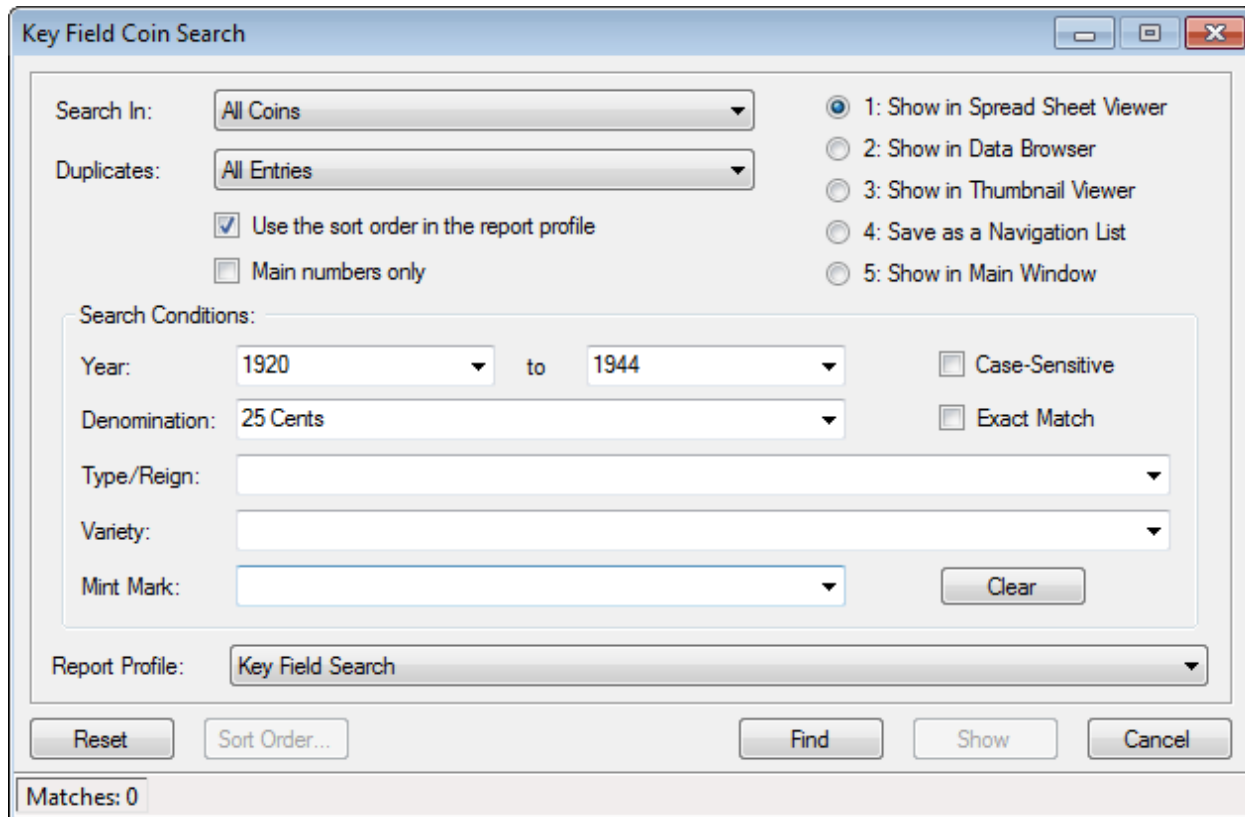
A grade group template allows you to create a custom selection of grades and save this to a file. Once you have selected some grades, you can click on the **New** button to save a new template file. It will now appear in the Grade Group dropdown list.

The **Delete** button can be used to remove group template files.

There are several places in EzCoin where grade group selection options are provided. When you have the opportunity to do so, this dialog window will always be available to allow quick selection of specific grades.

Key Coin Field Search

All coin records are uniquely identified by 5 primary key fields: Denomination, Year, Type/Reign, Variety, Mint Mark. The key field search is based on a combination of these 5 fields.



The screenshot shows the 'Key Field Coin Search' dialog box. It has a title bar with standard window controls. Inside, there are two dropdown menus: 'Search In:' set to 'All Coins' and 'Duplicates:' set to 'All Entries'. Below these are two checkboxes: 'Use the sort order in the report profile' (checked) and 'Main numbers only' (unchecked). To the right, there are five radio buttons for display options: '1: Show in Spread Sheet Viewer' (selected), '2: Show in Data Browser', '3: Show in Thumbnail Viewer', '4: Save as a Navigation List', and '5: Show in Main Window'. The 'Search Conditions' section contains five dropdown menus: 'Year:' (1920), 'to' (1944), 'Denomination:' (25 Cents), 'Type/Reign:', 'Variety:', and 'Mint Mark:'. There are also checkboxes for 'Case-Sensitive' and 'Exact Match', both unchecked. A 'Clear' button is next to the 'Mint Mark' dropdown. Below the search conditions is a 'Report Profile:' dropdown set to 'Key Field Search'. At the bottom are buttons for 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel'. A status bar at the very bottom shows 'Matches: 0'.

You must enter at least one of the 5 key fields to start a search.

Check the **Case-Sensitive** option to match upper and lower case text.

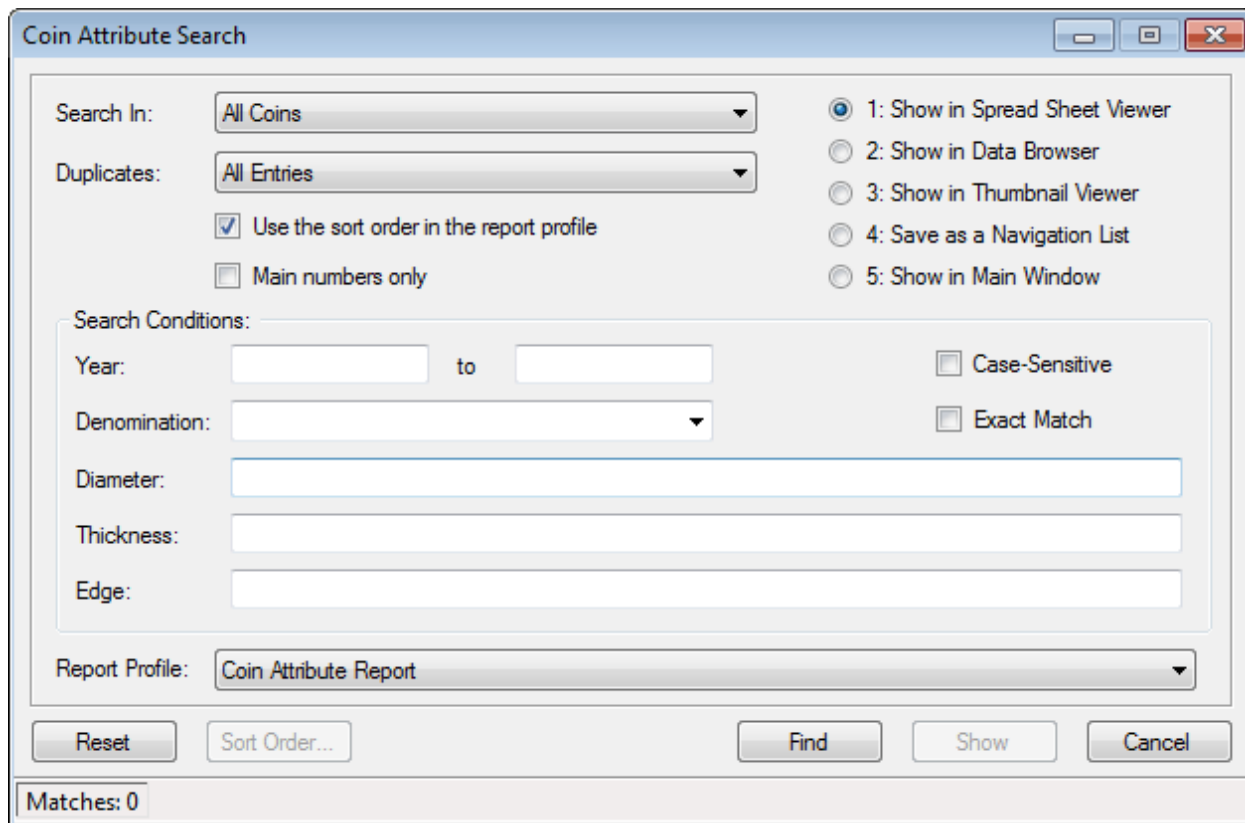
Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match. For example, a denomination search value of *cents* will match denominations such as 5 cents *and* 25 cents.

For a year range, only the starting value is required. Leaving the ending year empty will search all coins to present year.

Coin Attribute Search

This search option is based on the physical dimension/type of coin:

- Diameter
- Thickness
- Edge



The screenshot shows the 'Coin Attribute Search' dialog box. It has a title bar with standard window controls. Inside, there are two dropdown menus: 'Search In:' set to 'All Coins' and 'Duplicates:' set to 'All Entries'. Below these are two checkboxes: 'Use the sort order in the report profile' (checked) and 'Main numbers only' (unchecked). To the right, there are five radio buttons for display options: '1: Show in Spread Sheet Viewer' (selected), '2: Show in Data Browser', '3: Show in Thumbnail Viewer', '4: Save as a Navigation List', and '5: Show in Main Window'. A 'Search Conditions' section contains fields for 'Year:' (with a 'to' separator and another empty field), 'Denomination:' (a dropdown), 'Diameter:', 'Thickness:', and 'Edge:'. To the right of these fields are two checkboxes: 'Case-Sensitive' and 'Exact Match'. At the bottom, there is a 'Report Profile:' dropdown set to 'Coin Attribute Report'. Below the dropdown are four buttons: 'Reset', 'Sort Order...', 'Find', and 'Show'. At the very bottom, a status bar shows 'Matches: 0'.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

For a year range, only the starting value is required. Leaving both the start and end year empty will search all coins.

Composition Search

A composition search is based on the composition field, it's weight and any precious metal content.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

The composition field is free format text and generally contains the non-precious metal content for the coin, or any special notes regarding the composition.

The 4 precious metal types of Silver, Gold, Platinum and Palladium are searches based on a content percentage greater than zero. That is, this search feature doesn't allow you to search for a specific percentage of a precious metal - you will need to use a Power Search for that.

The Pure Compositions option will report on coins where the composition field is empty and the coin contains 1 or more of the precious metal components.

The weight is expressed in a unit of measurement. Use the drop down list to select a weight. Use the operation drop down list to select the type of weight comparison to use.

Mint Details Search

This search option is based on the mintage attributes

- Mint Location
- Mintage Circulation
- Proof Mintage Circulation

The screenshot shows the 'Mint Details Search' dialog box. It has a title bar with standard window controls. The main area contains several sections: 'Search In:' with a dropdown set to 'All Coins'; 'Duplicates:' with a dropdown set to 'All Entries'; a checkbox for 'Use the sort order in the report profile' which is checked, and a checkbox for 'Main numbers only' which is unchecked. To the right are five radio buttons for display options: '1: Show in Spread Sheet Viewer' (selected), '2: Show in Data Browser', '3: Show in Thumbnail Viewer', '4: Save as a Navigation List', and '5: Show in Main Window'. Below these is a 'Search Conditions:' section with fields for 'Year:' (empty), 'to' (empty), 'Denomination:' (empty dropdown), 'Mint Location:' (empty text box), 'Mintage' (100,000) 'to' (0) with a dropdown set to 'At Least', and 'Proof Mintage:' (0) 'to' (0) with a dropdown set to 'Don't Search'. There are also checkboxes for 'Case-Sensitive' and 'Exact Match', both unchecked. At the bottom is a 'Report Profile:' dropdown set to 'Mint Details Search'. Below the main area are buttons for 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel'. At the very bottom is a status bar that says 'Matches: 0'.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

For a year range, only the starting value is required. Leaving both the start and end year empty will search all coins.

For mintage and proof mintage, enter the circulation amounts with or without comma separations.

Period Search

This search option is based on the period of active circulation.

The screenshot shows the 'Period Search' dialog box. It has a title bar with standard window controls. Inside, there are two dropdown menus: 'Search In:' set to 'All Coins' and 'Duplicates:' set to 'All Entries'. Below these are two checkboxes: 'Use the sort order in the report profile' (checked) and 'Main numbers only' (unchecked). To the right, there are five radio buttons for display options: '1: Show in Spread Sheet Viewer' (selected), '2: Show in Data Browser', '3: Show in Thumbnail Viewer', '4: Save as a Navigation List', and '5: Show in Main Window'. A 'Search Conditions' section contains a 'Year:' field with a 'to' separator and another empty field, a 'Denomination:' dropdown, and a 'Period:' text field. There are also checkboxes for 'Case-Sensitive', 'Exact Match', and 'Use the year range to search the period'. At the bottom, there is a 'Report Profile:' dropdown set to 'Period Search', and buttons for 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel'. A status bar at the very bottom shows 'Matches: 0'.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

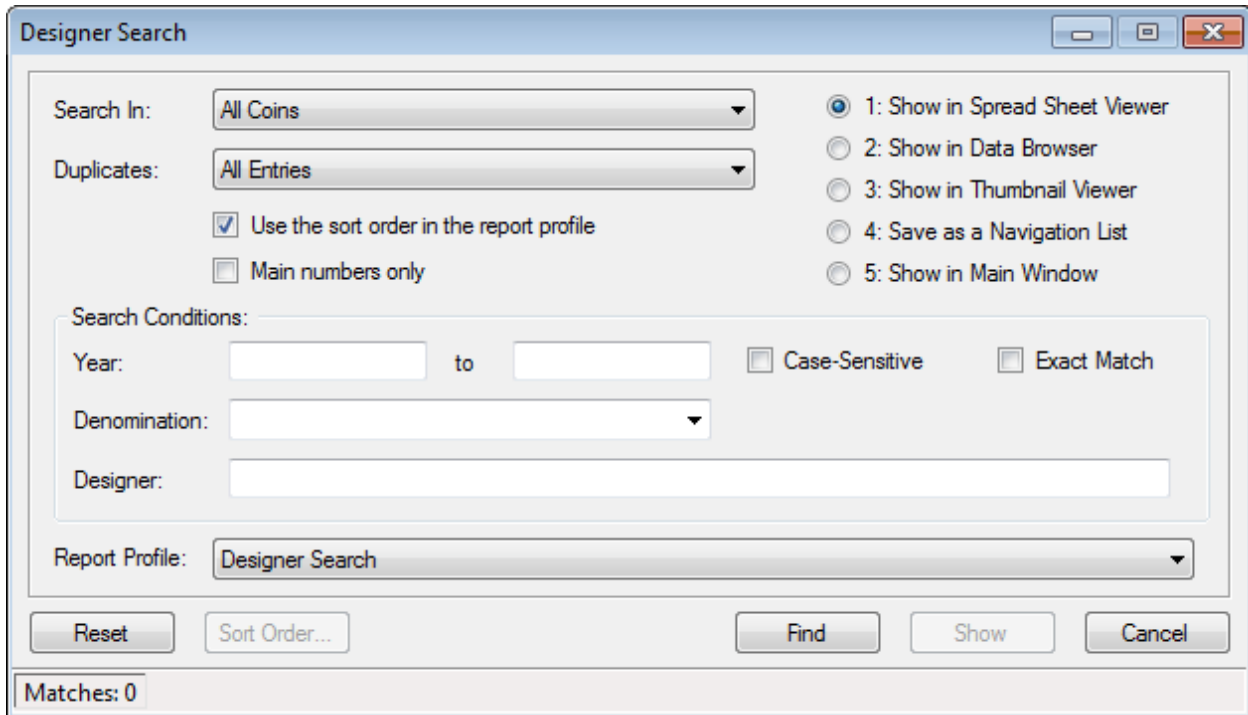
For a year range, only the starting value is required. Leaving both the start and end year empty will search all coins.

Check the year range option to force the year from and to values to match the period field, as opposed to the year of issue field.

For example, if a period is 1876-1882 and you enter a year range of 1850 to 1900, then this coin record would match on the period as 1876 is greater than 1850 and 1882 is less than 1900. If you entered 1875 to 1880, the coin record would not match, as 1882 falls outside of this year range.

Designer Search

This search option is based on the coin's designer.



The image shows a 'Designer Search' dialog box with the following fields and options:

- Search In:** A dropdown menu set to 'All Coins'.
- Duplicates:** A dropdown menu set to 'All Entries'.
- ☒ **Use the sort order in the report profile**
- ☐ **Main numbers only**
- Search Conditions:**
 - Year:** Two text input fields separated by 'to'.
 - Denomination:** A dropdown menu.
 - Designer:** A text input field.
- ☐ **Case-Sensitive**
- ☐ **Exact Match**
- Report Profile:** A dropdown menu set to 'Designer Search'.
- Display Options (radio buttons):**
 - ☒ 1: Show in Spread Sheet Viewer
 - ☐ 2: Show in Data Browser
 - ☐ 3: Show in Thumbnail Viewer
 - ☐ 4: Save as a Navigation List
 - ☐ 5: Show in Main Window
- Buttons:** 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel'.
- Matches:** A status bar at the bottom left showing 'Matches: 0'.

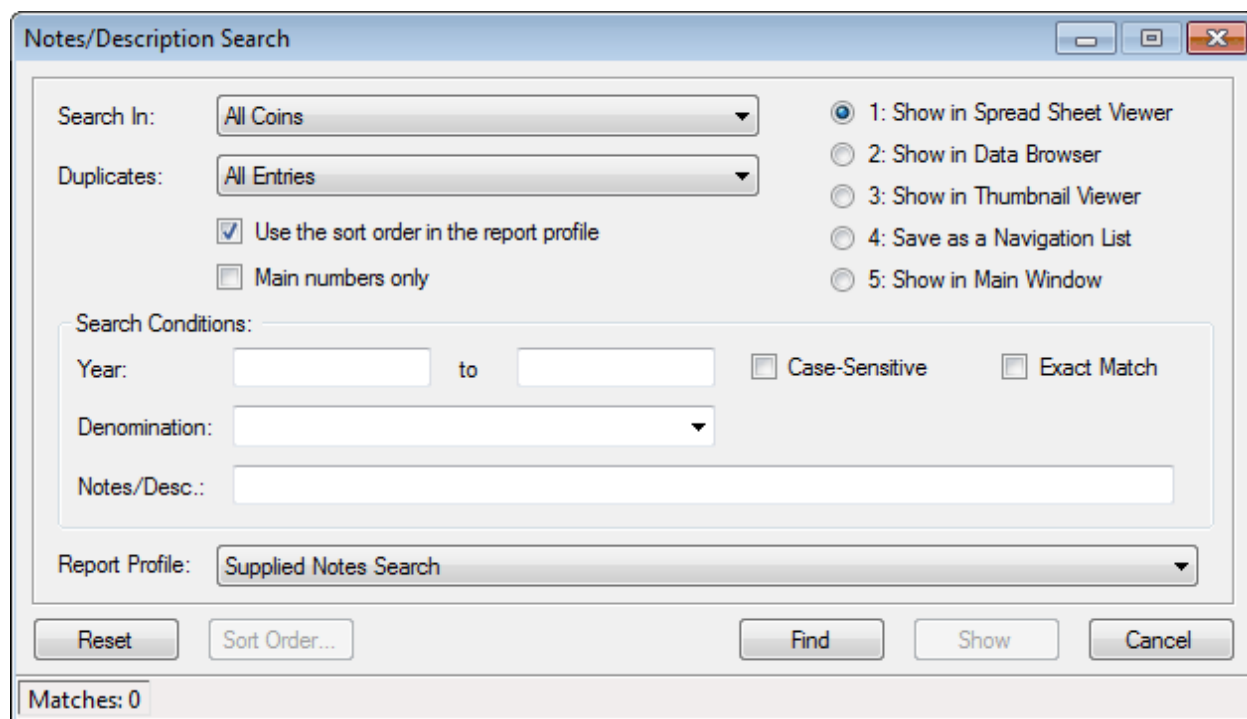
Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

Notes/Description Search

This search option is based on the coin's description/notes field. This is not a comments search. The description for a coin appears below the images in the main EzCoin window, and above the comments area.



Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

Location Search

This search checks both the primary coin location and the location fields at the grade level.

The screenshot shows the 'Location Search' dialog box. It has a title bar with standard window controls. The main area contains several sections: 'Search In:' with a dropdown set to 'Inventoried Data'; 'Duplicates:' with a dropdown set to 'All Entries'; a checkbox for 'Use the sort order in the report profile' which is checked, and a checkbox for 'Main numbers only' which is unchecked. On the right, there are five radio buttons for display options: '1: Show in Spread Sheet Viewer' (selected), '2: Show in Data Browser', '3: Show in Thumbnail Viewer', '4: Save as a Navigation List', and '5: Show in Main Window'. Below these is a 'Search Conditions' section with a 'Year:' field followed by 'to' and another field, a 'Denomination:' dropdown, a 'Main Match:' dropdown set to 'Find any coin where the main location has a value', a 'Search Value:' text field, a 'Grade Match:' dropdown set to 'Find coins with at least one grade location', and another 'Search Value:' text field. To the right of these are checkboxes for 'Case-Sensitive', 'Exact Match' (checked), and 'Main and grade both match'. At the bottom is a 'Report Profile:' dropdown set to 'Location Search'. Below the main area are buttons for 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel'. At the very bottom, a status bar shows 'Matches: 0'.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

Each grade for a given coin record can have its own location (or sub-location if you prefer to associate it that way). The grade location will always appear in the grade data grid, and the main location will always appear in the coin details area.

When searching for location values, make sure that the status of *Main and grade both match* checkbox option is what you want.

If this option is checked, then the search must match on BOTH conditions for the main location and the grade location. If the option is unchecked, then either condition can match to satisfy the search.

Main Match Search Conditions

Do not search on the primary location. Ignore checking the main coin location.

Partial or exact match on the search value. The search value entered must partially or exactly match, based on the status of the **Exact Match** checkbox.

Find any coin where the main location has a value. This will return a match if the location for the coin record contains any value.

Find any coin where the main location is empty. This will return a match if the location for the coin record has no value.

Grade Match Search Conditions

Do not search grade location values. Ignore checking the grade locations.

Partial or exact match on the search value. The search value must partially or exactly match the grade location for at least one inventoried grade.

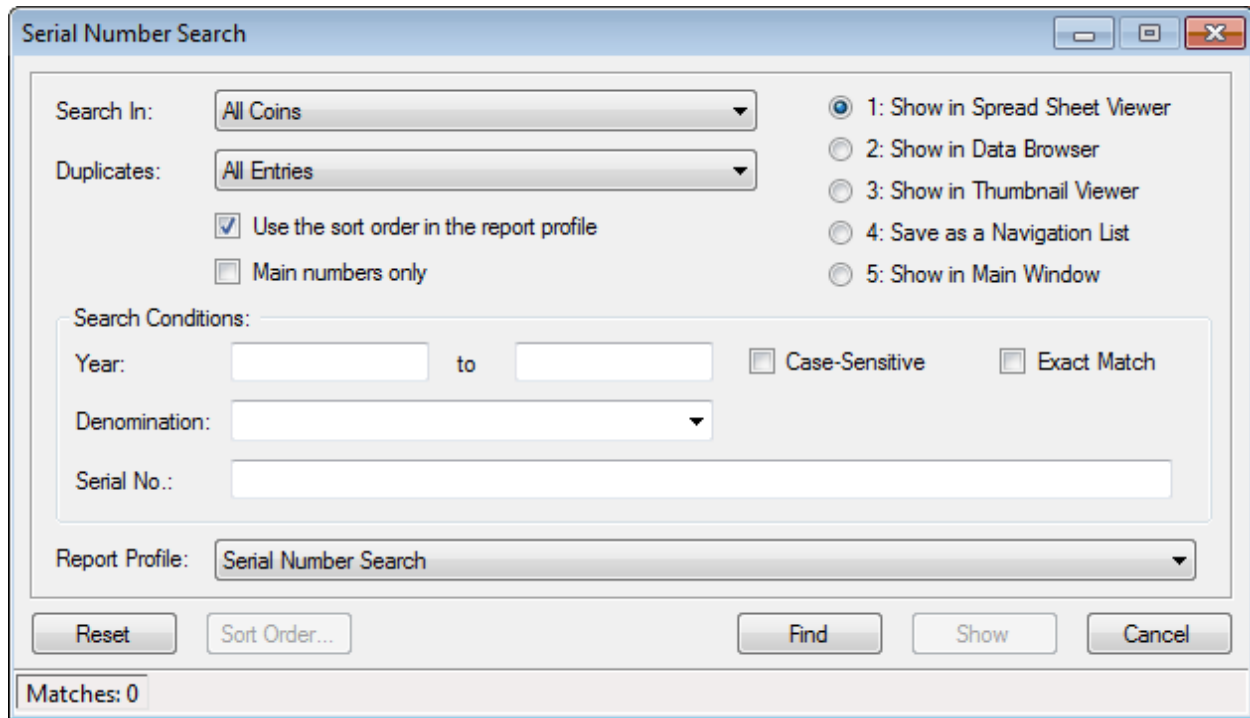
Find coins with at least one grade location. The search is satisfied if at least one inventoried grade has any location.

Find coins with no grade locations. The search is satisfied if every grade inventoried lacks a location.

Find coins with empty grade locations. The search is satisfied if at least one inventoried grade has no location.

Serial Number Search

This search option is based on the serial number, a field which is not supplied by SoftPro. You can use this for any generic purpose.



The image shows a 'Serial Number Search' dialog box with the following fields and options:

- Search In:** A dropdown menu set to 'All Coins'.
- Duplicates:** A dropdown menu set to 'All Entries'.
- ☒ **Use the sort order in the report profile**
- ☐ **Main numbers only**
- Search Conditions:**
 - Year:** Two text input fields separated by 'to'.
 - ☐ **Case-Sensitive**
 - ☐ **Exact Match**
 - Denomination:** A dropdown menu.
 - Serial No.:** A large text input field.
- Report Profile:** A dropdown menu set to 'Serial Number Search'.
- Buttons:** 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel'.
- Matches:** A status bar at the bottom showing 'Matches: 0'.

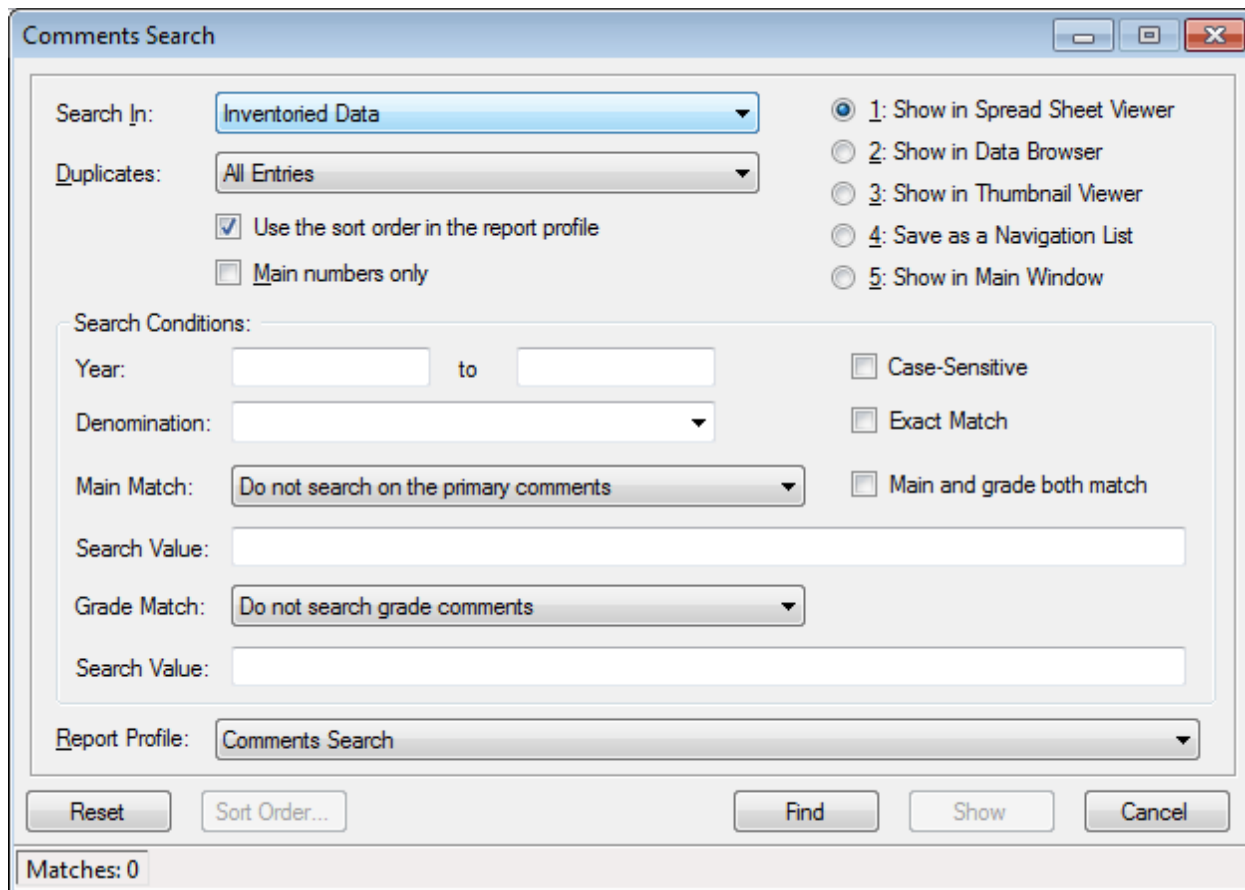
Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

Comments Search

This search checks both the primary coin comments and the comment fields at the grade level.

The screenshot shows a 'Comments Search' dialog box with a light blue title bar and standard window controls. The 'Search In:' dropdown is set to 'Inventoried Data'. The 'Duplicates:' dropdown is set to 'All Entries'. There are two checkboxes: 'Use the sort order in the report profile' (checked) and 'Main numbers only' (unchecked). On the right, five radio buttons are listed: '1: Show in Spread Sheet Viewer' (selected), '2: Show in Data Browser', '3: Show in Thumbnail Viewer', '4: Save as a Navigation List', and '5: Show in Main Window'. The 'Search Conditions' section includes 'Year:' with two input fields separated by 'to', 'Denomination:' with a dropdown, 'Main Match:' with a dropdown set to 'Do not search on the primary comments', 'Search Value:' with a text input, 'Grade Match:' with a dropdown set to 'Do not search grade comments', and another 'Search Value:' text input. To the right of these are three checkboxes: 'Case-Sensitive', 'Exact Match', and 'Main and grade both match'. The 'Report Profile:' dropdown is set to 'Comments Search'. At the bottom are 'Reset', 'Sort Order...', 'Find', 'Show', and 'Cancel' buttons. A status bar at the very bottom shows 'Matches: 0'.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

Each grade for a given coin record can have its own comments. These comments are in addition to the primary coin comments which appear below the coin image area.

When searching for comment values, make sure that the status of *Main and grade both match* checkbox option is what you want.

If this option is checked, then the search must match on BOTH conditions for the main comments and the grade comments. If the option is unchecked, then either condition can match to satisfy the search.

Main Match Search Conditions

Do not search on the primary comments. Ignore checking the main coin comments.

Partial or exact match on the search value. The search value entered must partially or exactly match, based on the status of the **Exact Match** checkbox.

Find any coin where the main comments have data. This will return a match if the comments for the coin record contains any value.

Find any coin where the main comments are empty. This will return a match if the comments for the coin record have no data.

Grade Match Search Conditions

Do not search grade comments. Ignore checking the grade comments.

Partial or exact match on the search value. The search value must partially or exactly match the grade comments for at least one inventoried grade.

Find coins with comments in at least one grade. The search is satisfied if at least one inventoried grade has any comments.

Find coins with no grade comments at all. The search is satisfied if every grade inventoried lacks comments.

Find coins with no comments for some grades. The search is satisfied if at least one inventoried grade has no comments.

Custom Field Search

Custom fields represent additional information to associate with a coin, which is not part of any default country configuration. Custom fields are created by you, or may be imported from version 1 of EzCoin. This search allows you to find information for one custom field at a time.

Note: This search type includes denomination and year range filter options.

Check the **Case-Sensitive** option to match upper and lower case text.

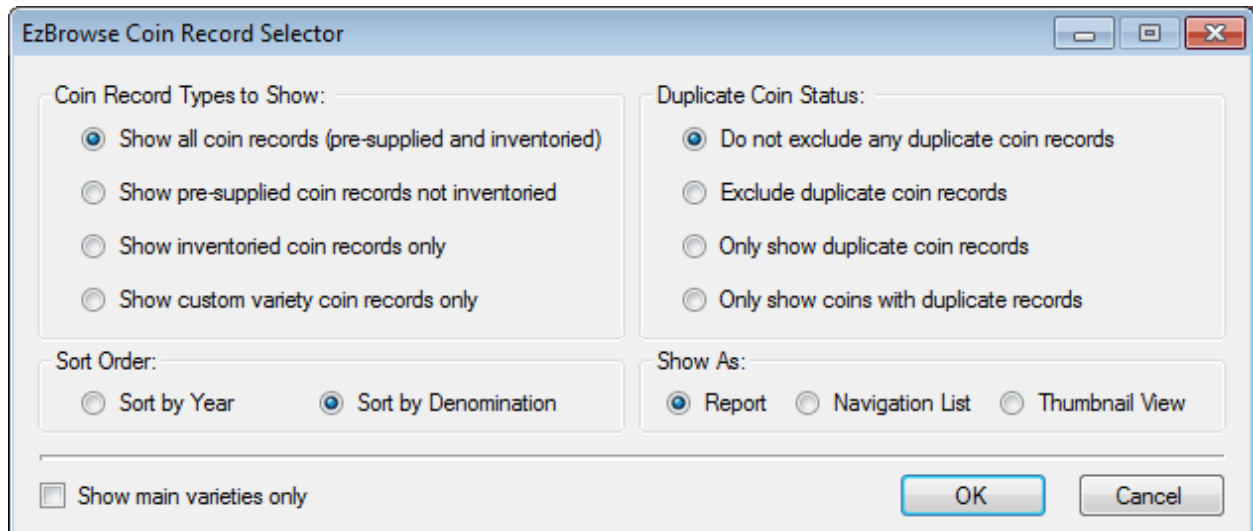
Check the **Exact Match** option to make your search values match 100% of the associated key field value. Without this option checked, the text you enter forms a partial match.

Every custom field you've created will appear in the dropdown list. Choose the field and then choose the type of search operation from the second dropdown list.

Enter the search value if one is required. Note that custom field searches are always based on a partial match scenario. You are not required to enter the full custom field value to match a record.

EzBrowse and EzInventory

These 2 options provide a quick at-a-glance view of coin information, for both pre-supplied and inventoried coins.



Unlike other searches, you will be presented with a simple dialog with the following choices:

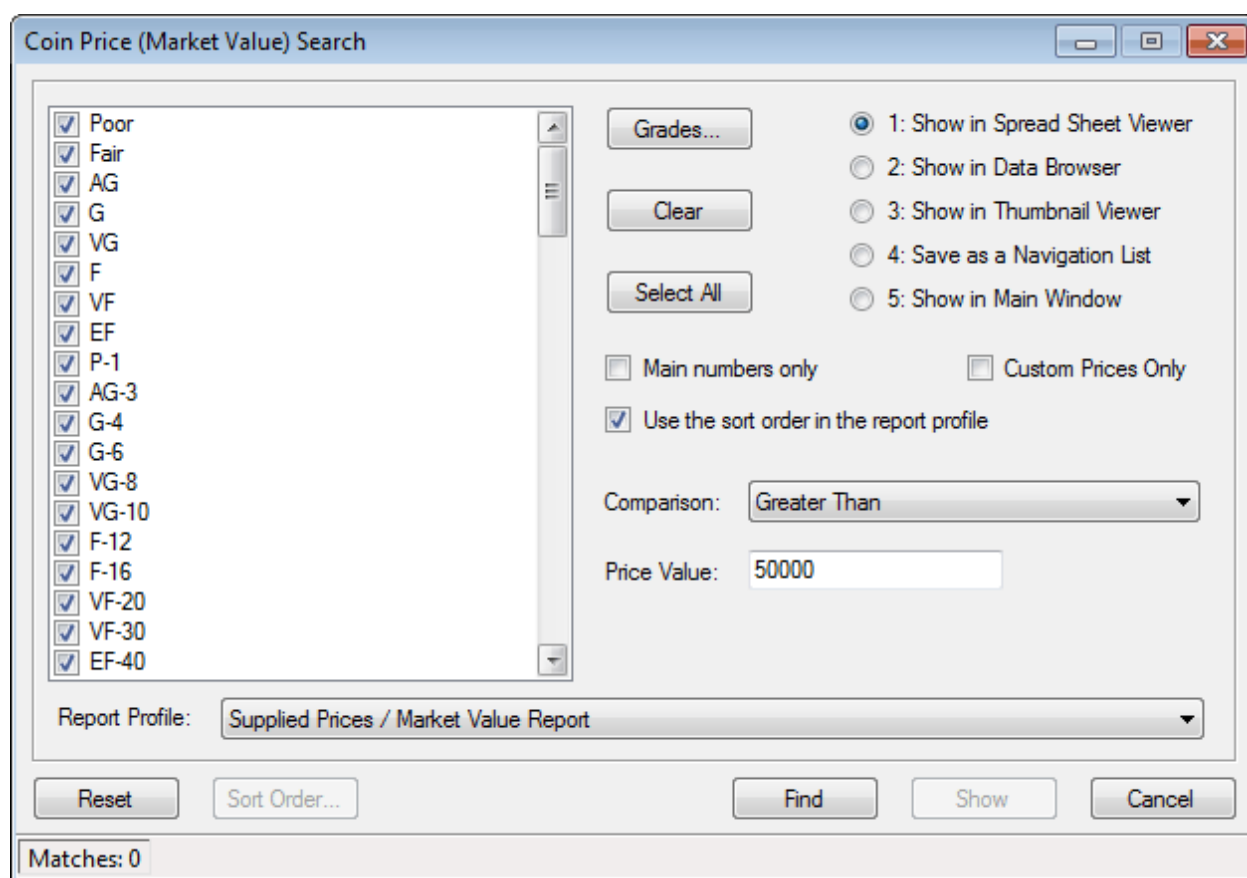
- Select the record type.
- Select the duplicate coin status.
- Choose either a year or denomination sort order.
- Set the output to report, navigation list or thumbnail images.
- Check the option to exclude sub-varieties as necessary.

EzBrowse by default will choose the all coin records option. EzInventory will default to inventoried coin records only.

Market Value/Pre-Supplied Price Search

Market values are the prices associated with each grade for each coin record. It's not required (and in fact is almost certainly the case) that every grade for every coin will have a market value assigned to it. Market values pre-supplied by SoftPro are based on the availability of pricing information at the time a country file is generated for use with EzCoin.

If a market value doesn't exist for a coin grade, you are free to add your own prices. Be aware that if you modify a pre-supplied market value, it may be replaced by one from SoftPro on the next supplied pricing update you download.



The left side of the dialog window provides a list of grades to filter on. Check any grades you want to search for pricing.

Click on the **Clear** button to clear the checked status for all grades. Click on **Select All** to check every grade in the list.

Use the **Grades** button to selectively choose grades and access the Grade Selection dialog window, allowing you to choose grades using custom grouping templates.

Check the **Custom Prices Only** to restrict the search to only include coins which have custom market values you supply, or for coins for which you've changed a price provided by SoftPro.

Choose a comparison type, and if required, a price amount.

Power Search

This option is available in the **Search** menu under **Power Search**. The power search provides the most comprehensive method to find coin records and filter the results down to what you are looking for. It doesn't provide the ability to replace all of the other searches and reports, especially the grade search feature, but it can be used as a substitute for many of them.

The screenshot shows the 'Power Search' dialog box. It has a title bar with standard window controls. The main area contains several sections: 'Search In:' with a dropdown set to 'All Coins'; 'Level of Search:' with a dropdown set to 'Level 1 And Level 2 Match'; 'Level 1 Search Criteria:' with 'Type' set to 'Primary Fields', 'Field' set to 'Denomination', 'Operation' set to 'Equal', and 'Search Value' set to '25 Cents'; 'Level 2 Search Criteria:' with 'Type' set to 'Inventoried Grades', 'Field' set to 'Market Value', 'Operation' set to 'Greater Than or Equal', and 'Search Value' set to '10,000'. There are also checkboxes for 'Show in Spread Sheet Viewer' (selected), 'Show in Main Window', 'Show in Data Browser', 'Show in Thumbnail Viewer', 'Save as a Navigation List', 'Ignore Duplicates', 'Main numbers only', and 'Profile Sort Order' (checked). At the bottom, there is a 'Report Profile:' dropdown set to 'Power Search - Mixed Coin Details Format', currency and denomination buttons (£, 1/4, 1/2, 3/4), and a row of buttons: 'Last Search', 'Reset', 'Load...', 'Save...', 'Sort Order...', 'Find', 'Show', and 'Exit'. A status bar at the very bottom shows 'Matches: 0'.

A power search is comprised of 1 to 3 levels, each level being a unique search unto itself. The **Level of Search** drop down list provides the conditions by which the results of the each search level are combined to create the final list of coin records which will be in the report.

The **Ignore Duplicates** option is a simple checkbox type (you can't choose to show only duplicates using this option. However, you can accomplish this using a field search based on duplicate sequence numbers greater than 1).

The level of search is used based on matching conditions between each level. For each single coin record searched against, each level counts a match result independently. For the example above, if a coin record has a denomination of 25 cents, the first level is considered to be a match. If any coin has any grade value greater than \$10,000, then the second level is considered to be a match.

Level of Search Types

As you choose a level of search, the number of levels in the dialog window will increase or decrease accordingly. You will not be able to perform a multi-level search unless each level's input conditions are entered.

Level 1 Only Matches	The simplest power search type, only one level of search, so a record is considered valid for the report if the search conditions are met.
Level 1 And Level 2 Match	A two level search when both levels of search must be valid. In the example above, the record must have a denomination of 25 cents and at least one inventoried grade must have a value greater than \$10,000.
Level 1 Or Level 2 Match	A two level search where either level must be valid, but not both.
Level 1, 2 And 3 All Match	A three level search where all 3 levels must have a matching condition.
Level 1 Or 2 Or 3 Match	A three level search where ANY of the 3 levels must have a matching condition.
(Level 1 Or 2) And Level 3 Match	A three level search where either level 1 or 2 has a matching condition, AND level 3 MUST always have a matching condition.
Level 1 And (Level 2 Or 3) Match	A three level search where either level 2 or 3 has a matching condition, AND level 1 MUST always have a matching condition.
Level 1 Or (Level 2 and 3) Match	A three level search where either level 1 has a matching condition OR BOTH level 2 AND level 3 have matching conditions.
(Level 1 And 2) Or Level 3 Match	A three level search where either level 3 has a matching condition OR BOTH level 1 AND level 2 have matching conditions.

Search Criteria: Type

The **Type** dropdown list specifies a subgroup of the information in a coin record. Once you select the type, additional filtering options will be adjusted based on the type you chose. Not all types shown below will be available, depending on the country which is currently open.

Primary Fields	Primary coin information, including fields from main application coin details area, catalog ID values and calculated price/quantity totals.
Any Text Field	Any field which is classified by EzCoin as simple text information will be searched. You can filter the text fields to a more restricted subset using the Fields button.
Any Numeric Field	Any field which is classified by EzCoin as numeric data (quantity or other non-currency numeric types) will be searched. Fields can be filtered using the Fields button.
Any Date Field	Any field which is classified by EzCoin as a date value will be searched. Fields can be filtered using the Fields button.
Any Currency Field	Any field which is classified by EzCoin as a monetary value will be searched. Fields can be filtered using the Fields button.
Custom Fields	If you have attached custom fields to the country file, you can search on any of them using this option.
Inventoried Grades	This option allows you to search specific fields related to grades which have been inventoried to the coin record. The Grades button will be enabled allowing for additional filtering to one or more specific grades.
Priority Want List	This option will search against records which are part of your Priority Want List.
Priority Sell List	This option will search against records which are part of your Priority Sell List.

Note: The search types for the PWL and PSL will search against all data rows associated with the coin record. For example, if you executed a PWL search and there are 4 priority list entries on a single coin record, the search is performed against all 4 entries, and if *at least one* entry matches the search, then the coin record is a valid match.

Search Criteria: Field

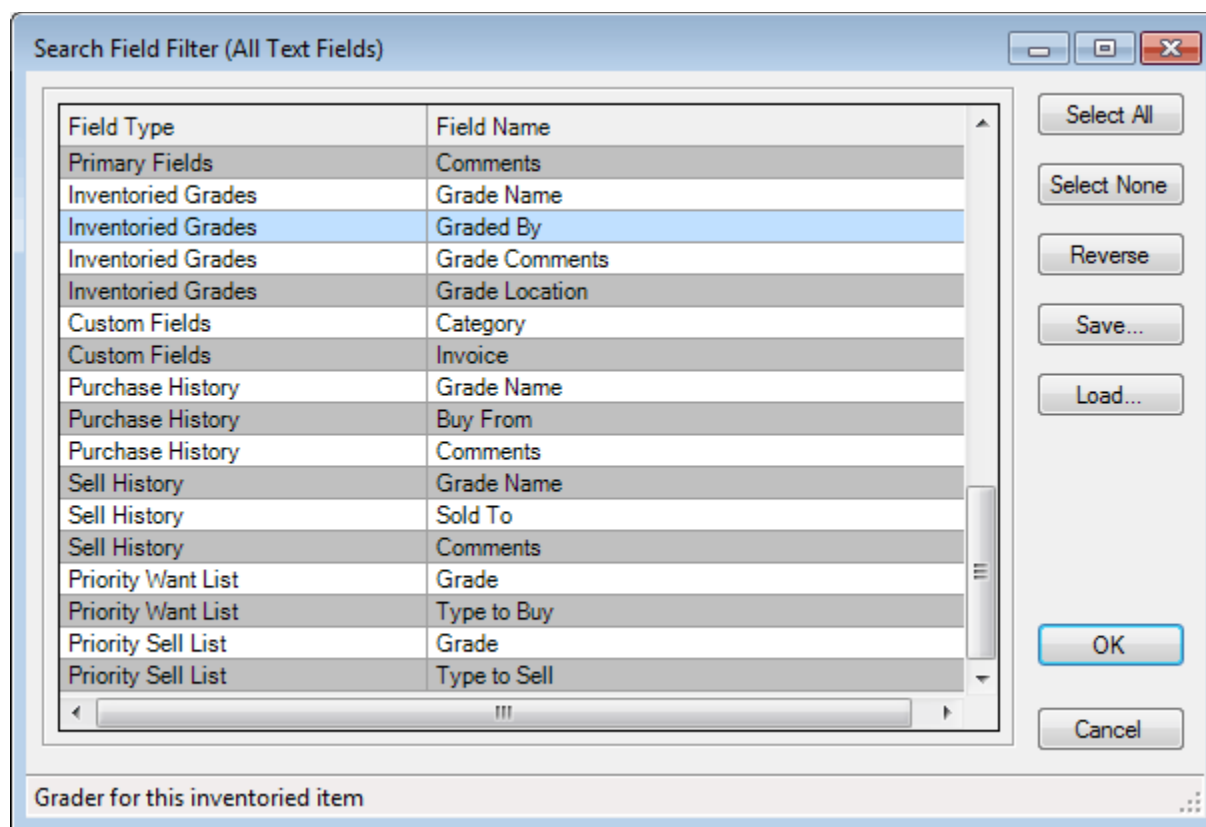
For the “Any” search types, such as Any Text field, this drop down list is disabled. For all other search types, this drop down list will contain all the fields which can be chosen to search against, based on the data type you chose. Only one field can be chosen for the power search level.

Grades Filter

For the Inventoried Grades search type, this button will be enabled, allowing you to restrict which grades will be searched. Clicking the button will show the Grade Selection Dialog Window.

Any Field Filter

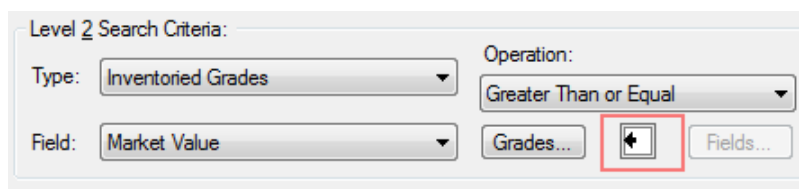
For the “Any” search types (Text, Numeric, Currency, Date), this button will be enabled, allowing you to provide additional restrictions to which fields are in scope for the search.



Select which fields should be part of the search and click on the **OK** button. If you want to create a custom filter and save it to file, click on the **Save** button. You can recall this filter by using the **Load** button.

Note: To clear a field filter, click on **Select None** then **OK**. For clearing a grade filter, you click on **Select All** then click on **OK**.

When either a Grade or Field filter is in effect, a small white arrow icon will be shown between the two buttons, indicating that a filter is being applied to the search. If there is no filter in effect, the icon will not appear.



Search Criteria: Operation

This drop down list contains the operations available to compare your search value(s) against the field values in the coin record. The types of operations available are automatically adjusted based on the type of data you are searching against.

Contains	For text fields, the search value matches on part of the coin record field value. The search value can be contained anywhere within the field.
Doesn't Contain	For text fields, the search value can't exist anywhere within the coin record field value.
Empty	The field value in the coin record doesn't contain any data.
Not Empty	The field value in the coin record contains any data other than "nothing".
Starts With	For text fields, the search value matches on the starting characters of the field value.
Ends With	For text fields, the search value matches on the ending characters of the field value.
Greater Than	The search value > coin field value.
Less Than	The search value < coin field value.
Equal To	The search value = coin field value.
Greater Than or Equal To	The search value >= coin field value.
Less Than or Equal To	The search value <= coin field value.
Not Equal To	The search value ≠ coin field value.
Between	The coin field value is between the two search values inclusively.
Is No	For Yes/No type field searches, the coin record value is No.

Is Yes	For Yes/No type field searches, the coin record value is Yes.
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Case-Sensitive Searches

For text-based fields, you can specify that the text search is to distinguish between upper and lower case characters by checking this option.

Search Values

Depending on the data type, you will enter data into the input field (there will be two input fields for the Between search operation) as numeric, text, currency or date formats.

- Numeric data can be either whole numbers without fractions (i.e. quantities), or numbers with a decimal point and fractional value.
- Currency values can be entered with the country file's defined currency symbol, or without it. In effect, a currency value can be entered as a numeric type. The currency value is always based on the current conversion rate, which is applied to all price values in the data.
- Date values can be entered using either the *display* or *input* date formats defined in the EzCoin general preferences. In addition, EzCoin will also accept dates entered using the current format defined at the Windows system level. Time values (hours, minutes, and seconds) are not acceptable, as EzCoin doesn't store time information for date fields.
- String data is limited to the maximum allowable length of the field you are searching against.

Last Search, Save and Load Options

These 3 buttons allow you to save and recall power search input conditions. By default EzCoin resets the power search to a default blank state. Once you execute a successful power search, the settings are saved automatically as the "last power search". By clicking the **Last Search** button, the previous input conditions will be restored.

The **Save** and **Load** buttons can be used to save customized power search conditions to a file name of your choosing. When loading a saved search, you will be asked for a file with a **.pwr** extension, which by default is saved to the Searches\Power folder within the EzCoin application path.

Running a Power Search

Click on the Find button to start the search. Depending on the type of search conditions (specifically, the "any" field types), the search may take several seconds to complete. A progress status will appear at the bottom of the dialog during the

search. If any matches are found, the **Show** button will be enabled, allowing you to display the results using any of the 5 display options.

Grade Searches and Reports

The Grade search provides a comprehensive set of input conditions to find coin records based on your inventoried grade data. The dialog's dual tab nature also provides the basic search conditions common to most other report types. These two tabs of search conditions are effectively combined together to generate the report data.

The grade search is available in the Search menu as Grades Search. The grades report is available in the **Reports** menu as **Grade Details Report**. There is only one key difference between these 2 menu items. The report generated from the Search menu presents the grade data horizontally across the page. The report generated from the Reports menu presents the data vertically down the page. Examples of each type are shown below.

Grades Report from the Search Menu

Rec. #	/G-8	F-12	VF-20	EF-40	AU-50	PF-65	Grade Qty	Net Value
1			1	\$140.05			1	\$140.05
2			1	\$81.31	2	\$1,600.00	4	\$3,514.66
3	0.50	2	\$23,142.90				3	\$61,996.30
4				3	\$15.15		3	\$45.45
5						1	\$648.60	\$999.85
Val	0.50		\$46,285.80	\$221.36	\$45.45	\$3,200.00	\$648.60	\$66,696.31
Qty							13	

Grades Report from the Report Menu

Grades Report (Grade Quantity + Net Value), Main and sub numbers, Inventoried Data

Options Bookmarks Edit Summary Rapid Entry View Help

Rec. #	Denomination	Year	Grade Name	BV	Grade Value	Quantity	Net Val	Coin Qty
1	1 Cent	1859	VF-20		\$140.05	1	\$140.05	1
2	1 Cent	1859	G-4		\$233.35	1	\$233.35	1
2			VF-20	Yes	\$81.31	1	\$81.31	1
2			AU-50		\$1,600.00	2	\$3,200.00	2
3	1 Cent	1859	VG-8		\$15,710.50	1	\$15,710.50	1
3			F-12		\$23,142.90	2	\$46,285.80	2
4	1 Cent	1882	EF-40		\$15.15	3	\$45.45	3
5	100 Dollars	1979	VF		\$351.25	1	\$351.25	1
5			PF-65	Yes	\$648.60	1	\$648.60	1
Total						13	\$66,696.31	13

Marked: 0 | 1 Cent, 1859

Type Search Conditions

The second tab in the search dialog contains search parameters common to most other report types.

The screenshot shows a window titled "Inventoried Grades and Values Search" with two tabs: "Grade Search Parameters" and "Type Search Parameters". The "Type Search Parameters" tab is active. It contains the following fields and controls:

- Search In:** A dropdown menu set to "Inventoried Data".
- Duplicates:** A dropdown menu set to "All Entries".
- Filter Method:** A dropdown menu set to "Coin Record Key Fields".
- Additional Grade Search Conditions:** A section containing:
 - Comments:** A text input field.
 - Graded By:** A dropdown menu.
 - Location:** A dropdown menu.
 - Case-Sensitive:** A checkbox.
 - Exact Match:** A checkbox.
- Key Search Conditions:** A section containing:
 - Denomination:** A dropdown menu.
 - Year:** A dropdown menu followed by "to" and another dropdown menu.
 - Type/Reign:** A dropdown menu.
 - Variety:** A dropdown menu.
 - Mint Mark:** A dropdown menu.
 - Case-Sensitive:** A checkbox.
 - Exact Match:** A checkbox.

At the bottom of the window are buttons for "Reset", "Sort Order...", "Load...", "Save...", "Find", "Show", and "Cancel". Below the buttons is a status bar that says "Matches: 0".

When choosing a filter method, the associated search values will appear in the lower section of this window.

The middle section of the window contains 3 fields unique to inventoried grades: Comments, Graded By and Location. You can enter complete or partial values in each field, and choose to make the search case-sensitive. Note that the filter methods use their own checkbox options for case-sensitivity and exact matching.

Search Condition Priority

The priority for matching coin records is based on the **Type Search Parameters** first, followed by the **Grade Search Parameters**. For example, if the type search conditions in Tab #2 resulted in 100 matching coin records, then the grade search conditions in Tab #1 will only be applied to the 100 records.

In effect, the Type Search conditions are applied *before* the Grade Search conditions.

Grades Search Conditions

The first tab in the search dialog contains search parameters unique to a grades report.

The screenshot shows the 'Inventoried Grades and Values Search' dialog box. The 'Grade Search Parameters' tab is selected. On the left, a list of grade categories is shown with checkboxes: Poor, Fair, AG, G, VG, F, VF, EF, P-1, AG-3, G-4, G-6, VG-8, VG-10, F-12, F-16, VF-20, VF-30, EF-40, EF-45, AU, AU-50, AU-55, and AU-57. To the right of the list are buttons for 'Grades...', 'Clear', and 'Select All'. Further right are checkboxes for 'Suppress zero quantity data', 'Suppress zero value data', 'Bullion-added Grades only', and 'Report profile sort order'. On the far right are radio buttons for 'Show in Spread Sheet Viewer', 'Show in Data Browser', 'Show in Thumbnail Viewer', 'Save as a Navigation List', and 'Show in Main Window'. Below these are sections for 'Values' and 'Quantities', each with 'Type' and 'Comparison' dropdowns. At the bottom is a 'Report Profile' dropdown set to 'Grades Search - Quantity + Grade Value'. A row of buttons includes 'Reset', 'Sort Order...', 'Load...', 'Save...', 'Find', 'Show', and 'Cancel'. The bottom status bar shows 'Matches: 0'.

The default report profile will be different depending on whether this window was displayed from the **Search** or **Reports** menu. For the search menu selection, all pre-supplied report profiles in the dropdown list will be based on a horizontal presentation of the grade data. From the reports menu, the profiles will be based on a vertical presentation.

Inventoried Grade Information

The following table describes the fields associated with a single inventoried grade.

Field	Description
Grade Name	The name of this grade, i.e. MS-65.
Market Value	The price of the grade, either a pre-supplied value or one which you assigned, expressed in the current currency format and conversion rate assigned to the country.
User Value	You can choose to override any market value for any grade. By default no user value will be applied to any inventoried grade.
Bullion Value	If a coin was inventoried as a bullion value based on precious metal content and a valid weight, this will be the value of the coin, superseding the market/user value.
Quantity	Quantity can be a value from 0 and up to a maximum of 99,999,999. A grade can be inventoried with zero quantity.
Net Value	This is quantity * the user value/bullion value/market value.
Coin Qty	The total coins associated with a single grade. This value is e grade quantity multiplied by the Coin Set Quantity (which normally is 1 coin for non-set records) to result in the total number of physical coins.
Comments	You may enter any text comments to associate with a grade. This search value appears only on tab #2.
Location	You may enter an optional location to associate with a grade. This search value appears only on tab #2.
Graded By	You may enter an optional value for who graded the coin. This search value appears only on tab #2.

Search Conditions

The following table shows the various input conditions for a grade search.

Attribute	Description
Value Type	This determines what currency value of the grade data will be used for the search. See the next section for a list of possible types.
Quantity Type	Quantity can be chosen for single grades, selected (from the checkbox list) or net total. You can also choose to search on a specific <i>Coins per Grade</i> value.
Value and Quantity Comparison Types	These are basic comparison operations. The default value of All Values implies matching any value or any quantity, regardless of what those values are. In other words, if the grade is inventoried, it will be counted.
Suppress Zero Quantity	When checked, any grade record where the quantity is zero will be excluded from the search.
Suppress Zero Values	When checked, any grade record where the grade user value, bullion value, and market value are ALL zero will be excluded from the search.
Bullion Added Grades Only	This checkbox represents a convenient method to generate bullion reports. Check this option and only grades which were inventoried as bullion values will be included.
Grade Selection	A grade search is not allowed until you select at least one grade in the checkbox list. The Clear , Select All and Grades buttons can be used as alternative methods to checking and un-checking grades one by one. Only grades which are selected are used as the basis for the search. The exceptions to this are "Totals" Quantity and Value attributes, which affect all grades inventoried on the coin record.

Value and Quantity Types

The two Type drop down lists for currency and quantity values are summarized in the following table.

Single grade types will appear on the report if *at least one* of the selected grades in the checkbox list satisfies the search conditions. For example, if MS-63 and MS-65 are checked, and you specify a Single Grade Market Value greater than \$1000.00, then the coin appears on the report if *either* grade has a market value over \$1000.00.

Selected grade types will appear on the report only if the sum total of the quantity or value match on the search conditions. For example, if you have checked MS-60 through MS-70, and specified Selected Net Grade Quantity over 25, then the sum net quantity of the inventoried grades matching from MS-60 to MS-70 for the coin must total more than 25.

Total grade types apply to all inventoried grades, regardless of the grades checked in the list. You will still need to check at least one grade for this type of search, even though every grade inventoried will be counted.

Type	Description
Single Grade Market Value	The price for a single grade.
Single Grade User Value	Your custom value for a single grade.
Single Grade Bullion Value	The bullion value of the grade, if inventoried as such.
Single Grade Net Value	The user value/market value/bullion value * quantity.
Selected Grades Net Value	The sum of Net value for all selected grades.
Total Net Worth	The sum of all Net values for every grade inventoried on the coin record.
Single Grade Quantity	The inventoried quantity of a single grade. A value of zero is allowed.
Single Grade Coin Quantity	The Coin Qty for Sets * Quantity result for a single grade. For records which are represented by a single physical coin, this will be the same as the Single Grade Quantity value.
Selected Net Grade Quantity	The sum of all quantities for all selected grades.
Selected Net Coin Quantity	The Coin Qty for Sets * Quantity result for all selected grades.
Total Net Grade Quantity	The sum of all quantities for all inventoried grades.
Total Net Coin Quantity	The Coin Qty for Sets * Quantity result for all inventoried coins.

Filtering Rules

The following table indicates how grade records and the coin record the grades are associated with will be filtered in the search. For searches where a single grade is excluded from the report, it will still allow the coin record to appear with the grades which did match the search conditions. However, if the search results in elimination

of every grade from the report, the coin record will also be eliminated from the report.

Rule/Condition	Result on Failure
No inventoried grade data present	The coin record will never show in the report.
Default conditions (what you see when you click the Reset button) status.	Every coin record which has at least one inventoried grade will appear in the report.
Comparison type of All Values for Values	No currency values will be subject to filtering – any grades with a price count.
Comparison type of All Values for Quantities	No quantities will be subject to filtering – any grades with a quantity over 0 will count.
Grades not selected in the checklist box	They will be excluded from a search except when using value or quantity Types with the “Total” prefix such as Total Net Worth.
Selected grades Net Quantity or Net Value fail to match the search.	The entire coin record is excluded from the report.
Total net quantity or net worth failed to match the search.	The entire coin record is excluded from the report.
User comments, location or graded by failed to match the search.	Only grades which don’t match on the comment, location, or graded by text will be excluded from the report.
Suppress Zero quantity is enabled, but the grade has no quantity.	Exclude the grade from the report.
Suppress Zero value is enabled, but the grade has no value.	Exclude the grade from the report.
Bullion Added Grades option enabled.	Exclude any grades which are not inventoried as a bullion value.
Single Grade search types where the grade Quantity or net value failed to match the search.	Exclude the grade from the report.

How Grade Selections Work

You must select at least one grade to execute a search. The grade list itself will act as a filter for Selected and Single Grade quantity/value Type attributes, dates and buy/sell information. Unchecked grades are excluded, as if you didn’t inventory the grades at all for the coin record. The exception to this is for the Totals Types in the

quantity and value drop down lists, in which all grades will be used to calculate net totals on the coin record.

Each grade inventoried is counted as “this grade record has data” even if all of the following grade attributes are zero or blank:

- Quantity
- User Value
- Market Value
- Bullion Value
- Comments
- Location
- Graded by

It’s perfectly acceptable to inventory a grade in this way. However, only the default **All Values** comparison search conditions will pick up these types of records on the report. Every other comparison type will require the associated attribute to be populated for the grade.

Performing the Search

Click on the **Find** button to search the country file for matching coin records. If any matches are found, then the **Show** button will be enabled, allowing you to display the results using any of the 5 output types. If the **Show in Main Window** option is chosen, the first matching record will automatically be displayed in the main EzCoin window.

Loading and Saving Search Conditions

Use the **Load** and **Save** buttons to store search conditions to files which can be recalled at a later time. These files are saved in the application folder under **Searches\GRD**.

Change History Report

EzCoin will keep track of when you last made changes to an inventoried record. The type of change (i.e. changing the name of the Designer) will not be recorded. Only the date of a change is saved.

Inventoried Change History for Coin Data

Search In:

Duplicates:

☒ Use the sort order in the report profile

☐ Main numbers only

Search Conditions:

☐ Recent Days ☒ Recent Months ☐ Date Range

Recent Months: ...

Report Profile:

☒ 1: Show in Spread Sheet Viewer
☐ 2: Show in Data Browser
☐ 3: Show in Thumbnail Viewer
☐ 4: Save as a Navigation List
☐ 5: Show in Main Window

Each coin record is saved with the date and time for the following:

- Adding new coins
- Updating coin data
- Supplied data updates

Matches: 0

The report can provide results based on all inventoried data, or only on custom varieties not pre-supplied by SoftPro.

The date of change can be searched using recent days, recent months, or a specific date range.

Note: The last change date is affected not only by your updates to the country (via the blue check button, Rapid Multi Entry, or from the spreader viewer), but also by pre-supplied update patches from SoftPro.

Basic and Detailed Inventory Reports

The basic and detailed reports are identical in terms of setting the search conditions. The only difference between them is the default report profile assigned for spreadsheet views and printed reports.

Detailed Report with Key Field Filter Method

Detailed Inventory Report

Search In:

Duplicates:

Filter Method:

☒ Use the sort order in the report profile

☐ 1: Show in Spread Sheet Viewer
☐ 2: Show in Data Browser
☐ 3: Show in Thumbnail Viewer
☐ 4: Save as a Navigation List
☐ 5: Show in Main Window

☐ Main numbers only

Key Search Conditions:

Denomination: Year: to

Type/Reign:

Variety:

Mint Mark:

☐ Case-Sensitive ☒ Exact Match

Report Profile:

Reset Sort Order... Find Show Cancel

Matches: 0

Detailed Inventory Report - Unfiltered Default Method

Detailed Inventory Report

Search In:

Duplicates:

Filter Method:

☒ Use the sort order in the report profile

Date Conditions:

☒ Include only coin records for a specific period for when they were last updated

Start Date: ...

End Date: ...

Report Profile:

☐ 1: Show in Spread Sheet Viewer
☐ 2: Show in Data Browser
☐ 3: Show in Thumbnail Viewer
☐ 4: Save as a Navigation List
☐ 5: Show in Main Window

☐ Main numbers only

Reset Sort Order... Find Show Cancel

Matches: 0

Report Fields - Basic vs. Detailed

Basic Report	Detailed Report
Denomination	Denomination
Year	Year
Type/Reign	Type/Reign
Variety	Variety
Mint Mark	Mint Mark
Notes	Notes
Location	Location
Serial Number	Serial Number
	Quantity and Net Value for Each Grade
Total Grade Quantity	Total Grade Quantity
Total Net Value	Total Net Value

Although the reports look quite similar, the detailed report shows a column for every inventoried grade associated with a coin record.

Quick Stats Inventory Reports

These reports all use the same common search conditions dialog window. The only difference between them is the choice of default report profile.

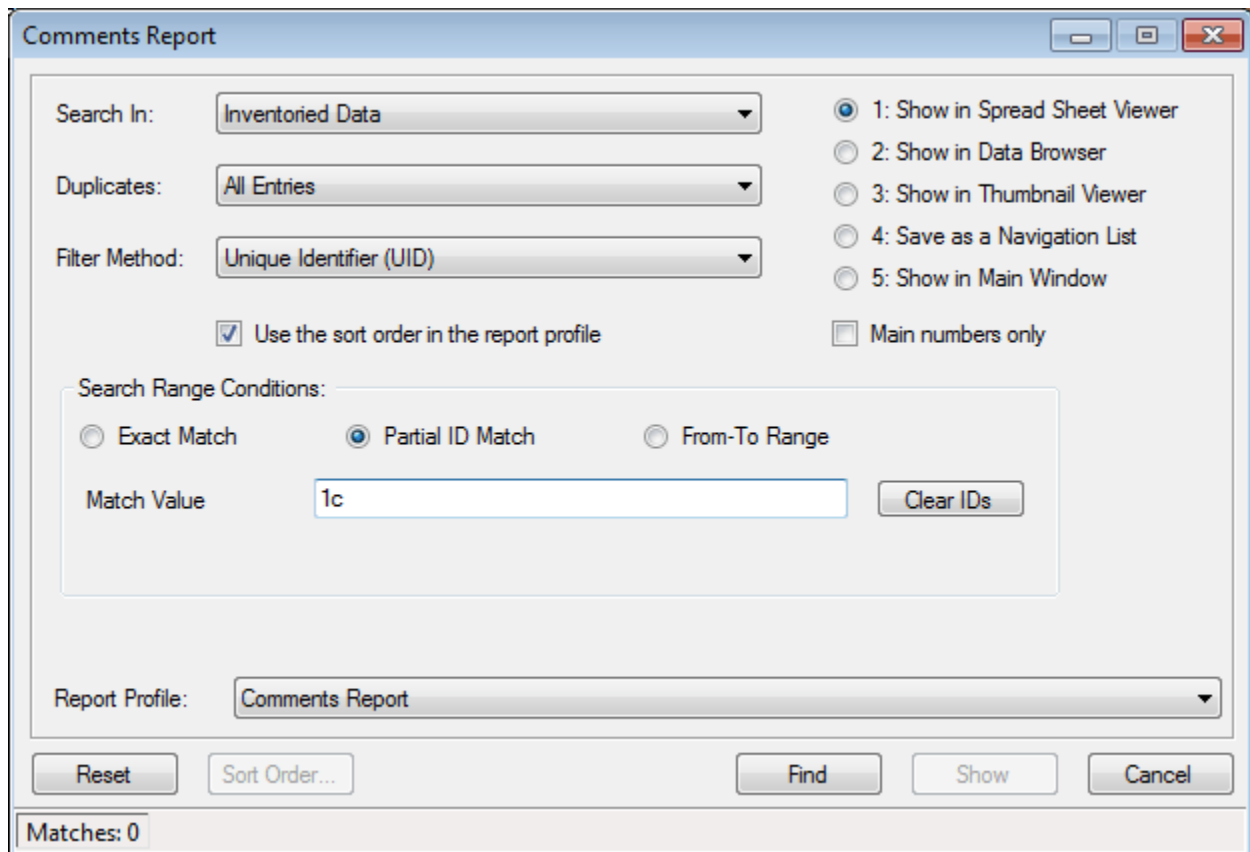
Quick Stats 1 Report with UID Filter Method

Report Fields - Quick Stats 1, 2 and 3

Quick Stats 1	Quick Stats 2	Quick Stats 3
	Image Preview	
Denomination	Denomination	Denomination
Year	Year	Year
Type/Reign	Type/Reign	Type/Reign
Variety	Variety	Variety
Mint Mark	Mint Mark	Mint Mark
		Individual Grade Qty + Net Value Columns
Total Grade Quantity	Total Grade Quantity	Total Grade Quantity
Total Net Value	Total Net Value	Total Net Value
		Total Net Purchased
		Total Net Sold
		Total Net Profit

Comments Report

The comments report is not a comments search. Whereas the search option allows you to selectively find comments using text matching conditions, the comments report is a summary listing of all coin records for which you've attached a comment.



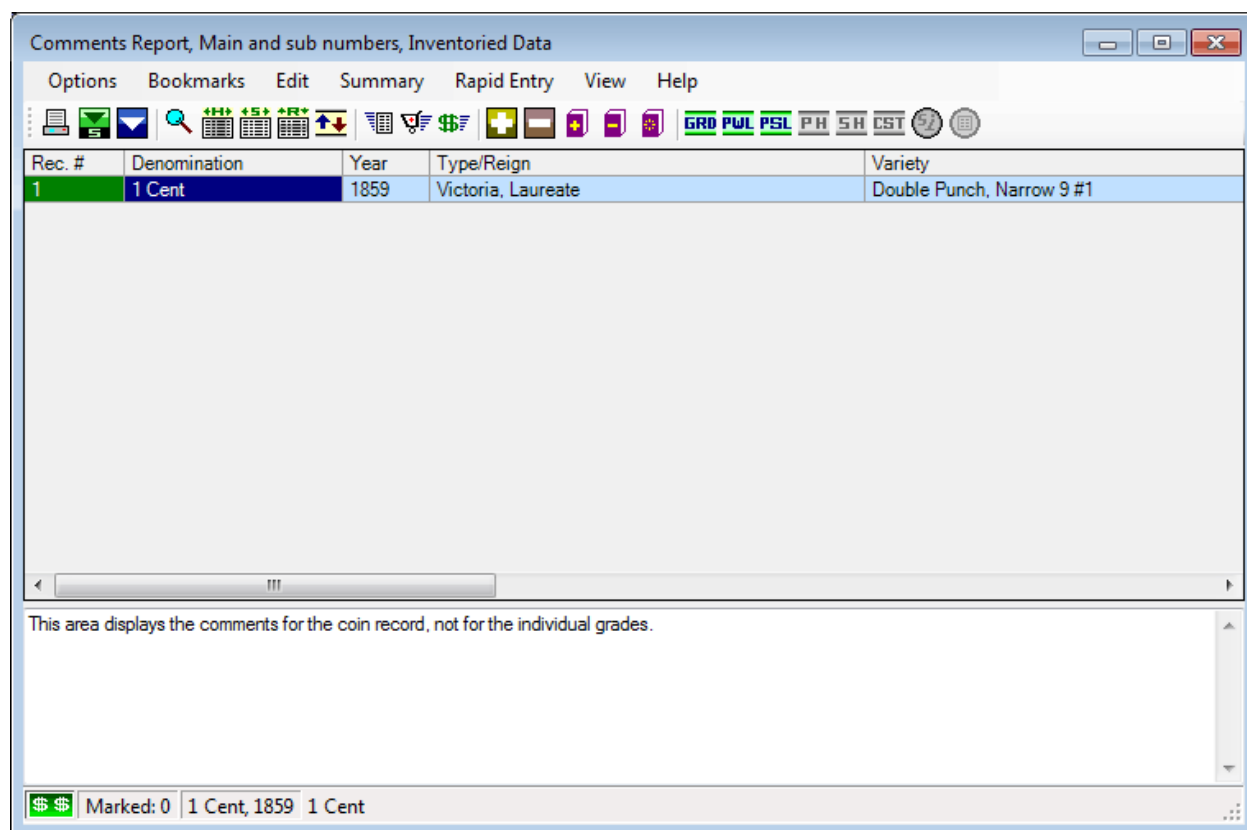
The screenshot shows the 'Comments Report' dialog box. It has a title bar with standard window controls. The main area contains several settings:

- Search In:** A dropdown menu set to 'Inventoried Data'.
- Duplicates:** A dropdown menu set to 'All Entries'.
- Filter Method:** A dropdown menu set to 'Unique Identifier (UID)'.
- Display Options:** A group of radio buttons and a checkbox:
 - ☒ 1: Show in Spread Sheet Viewer
 - ☐ 2: Show in Data Browser
 - ☐ 3: Show in Thumbnail Viewer
 - ☐ 4: Save as a Navigation List
 - ☐ 5: Show in Main Window
 - ☐ Main numbers only
- Sort Order:** A checkbox labeled 'Use the sort order in the report profile' which is checked.
- Search Range Conditions:** A section with three radio buttons:
 - ☐ Exact Match
 - ☒ Partial ID Match
 - ☐ From-To Range
- Match Value:** A text input field containing '1c'.
- Clear IDs:** A button next to the Match Value field.
- Report Profile:** A dropdown menu set to 'Comments Report'.

At the bottom, there are four buttons: 'Reset', 'Sort Order...', 'Find', and 'Show'. Below these buttons is a status bar that says 'Matches: 0'.

Other than the basic filtering methods common to most reports, you won't see a comment text filter - you get all coin records containing comments after applying the common search condition filters.

The report profile is different as well, in that comments reports divide the results window between the primary coin attributes and the comment text.



The bottom section of the spreadsheet viewer will show the comments for the selected coin record in the data grid. You won't be able to edit the comments from the comments area under the grid - use the Comments edit option from the Summary menu instead.

When printing the comments report, each coin record's comments will be displayed in a page-width spanning format, underneath the other coin report fields.

Note: This report type doesn't provide any grade level comments information.

Cross Reference Report

A cross reference report is designed to show basic coin information with associated location, serial number and alternate catalog ID values.

Catalog ID/Location Cross Reference Report

Search In: All Coins

Duplicates: All Entries

Filter Method: Coin Record Key Fields

☒ Use the sort order in the report profile

☐ Main numbers only

Key Search Conditions:

Denomination: Year: to

Type/Reign:

Variety:

Mint Mark: ☐ Case-Sensitive ☒ Exact Match

Report Profile: Cross Reference Report

Reset Sort Order... Find Show Cancel

Matches: 0

The serial number and location fields are not part of the search conditions. They are simply included in the cross reference. The default search conditions for this report type will show all coin records assigned to the country with the associated cross-reference fields listed below.

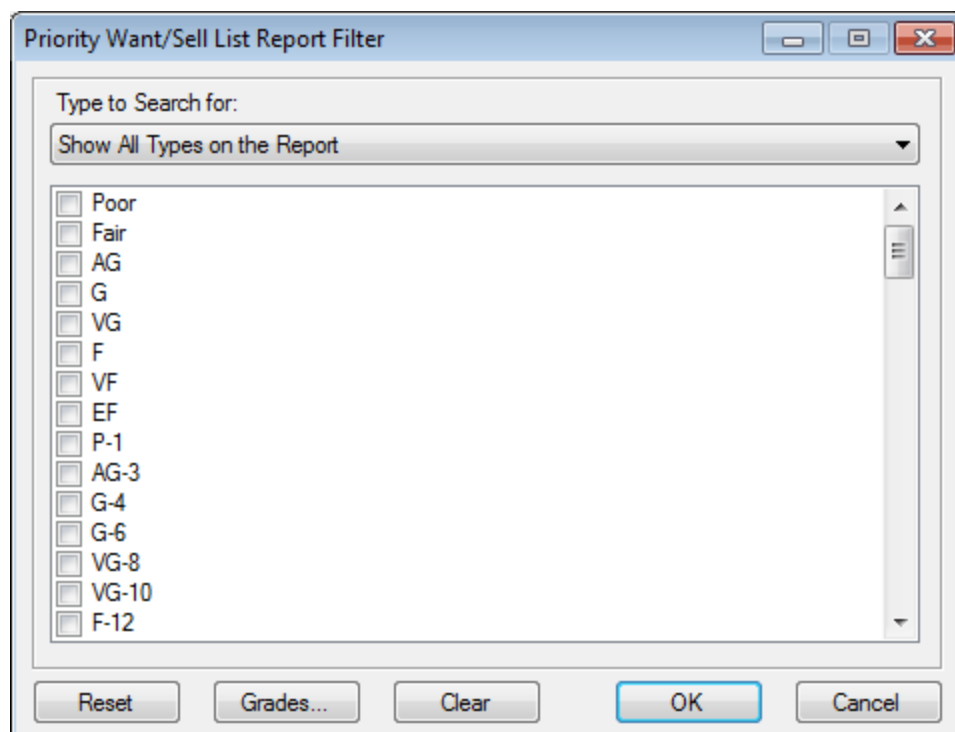
- Unique Identifier (UID)
- Location (main location only, not grade level locations)
- Serial Number
- Pre-supplied alternate catalog ID values (if applicable)
- Your custom catalog ID values (if used)

Priority Want and Sell List Reports

These two report types provide a summary of all coin records you've added to the Priority Want List (PWL) and Priority Sell List (PSL) repositories in the country file.

The screenshot shows a software window titled "Priority Want List Report". It contains several input fields and options for generating a report. On the left, there are three dropdown menus: "Search In:" set to "All Coins", "Duplicates:" set to "All Entries", and "Filter Method:" set to "Coin Record Key Fields". Below these is a checkbox labeled "Use the sort order in the report profile". On the right, there are five radio button options: "1: Show in Spread Sheet Viewer" (selected), "2: Show in Data Browser", "3: Show in Thumbnail Viewer", "4: Save as a Navigation List", and "5: Show in Main Window". Below these is another checkbox labeled "Main numbers only". In the center, there is a section titled "Key Search Conditions:" with four input fields: "Denomination:", "Year:" followed by "to", "Type/Reign:", and "Variety:". Below these is a "Mint Mark:" field and two checkboxes: "Case-Sensitive" and "Exact Match". At the bottom of the main area is a "Report Profile:" dropdown menu set to "Priority Want List Report". Below the main area are five buttons: "Reset", "Sort Order...", "PWL Filter...", "Find", and "Show". At the very bottom, there is a status bar that says "Matches: 0".

These report types are similar to the other basic reports, with an additional button at the bottom labeled **PWL Filter** (or PSL Filter). Clicking on this button will show the following dialog.



This filter window allows you to select specific grades or types to buy (sell for PSL) to show on the report.

The default PWL/PSL reports only show the following basic information:

- Denomination
- Year
- Type/Reign
- Variety
- Mint Mark
- PWL/PSL Data: Grade, quantity, type to buy/sell, market value, net buy/sell value

The PWL/PSL data is represented by a data group in the report profile. This means each grade for a given coin record is represented by one row in the report, and will be presented down the page in a vertical format.

If you have added the coin record to the PWL/PSL without any specific grades, the report will show just one row for the coin record, with the grade set to "Any". In addition, the net buy/sell value would be \$0.00, since there is no actual grade to determine the market/price values available. An example report is shown below. Note the third record has no net buy value, as the quantity was added as zero, without an available buy price or market value. This is an acceptable PWL entry.

Want List Report

Unlike a Priority Want List report, where you pick coins and grades one by one to add to a specialized list, the want list report is simply a report on all pre-supplied coin records from SoftPro for the current country which are not currently part of your inventory.

The screenshot shows the 'Want List Report' dialog box with the following settings:

- Search In:** Supplied (Not Inventoried)
- Duplicates:** All Entries
- Filter Method:** Unfiltered (All Coins)
- ☒ Use the sort order in the report profile
- Date Conditions:**
 - ☐ Include only coin records for a specific period for when they were last updated
 - Start Date:** [Empty] [...]
 - End Date:** [Empty] [...]
- Report Profile:** Want List Report
- Display Options:**
 - ☒ 1: Show in Spread Sheet Viewer
 - ☐ 2: Show in Data Browser
 - ☐ 3: Show in Thumbnail Viewer
 - ☐ 4: Save as a Navigation List
 - ☐ 5: Show in Main Window
 - ☐ Main numbers only

Buttons at the bottom: Reset, Sort Order..., Find, Show, Cancel.

Matches: 0

You can choose either pre-supplied non-inventoried coin records (default) or all pre-supplied coin records from the Search In dropdown list. Want list reports will not work for custom country files which have no pre-supplied coin records from SoftPro.

Purchase/Sell History Report

EzCoin maintains transactional history for all coins purchased or sold independent of inventoried grade information. This is a notable change from version 1 of EzCoin, where purchase/sell information could only be attached to inventoried coin records.

The transactional history is cumulative. For a coin uniquely identified by denomination, year, type/reign, variety, and mint mark, you are free to make multiple purchase/sale transactions over time.

The dialog window shown is for a Purchase History Report. The Sell History Report has the same settings and is not shown here.

The lower second of the report search conditions window provides the basic filter for the 5 primary coin fields. The upper section of the window contains fields related to purchase/sell history information.

Field	Description
From/To Date	When you record a purchase or sale, you should enter a date for when the transaction took place. The from/to values allow you to set a range of dates for when coins were

Field	Description
	<p>purchased/sold. If you leave the "to date" field empty, the range will extend to today's date.</p> <p>Use the ... button to the right of the date field to use a popup calendar to choose the date.</p>
Buy/Sell Quantity	The quantity of coins purchased or sold. Use the drop down list to the right of the field to set a comparison method.
Buy/Sell Price	The price of the purchase or sale (total, for all coins in the transaction).
Comments	Optional comments you can attach to the purchase/sale.
Bought From / Sold To	Who you purchase the coin(s) from or sold them to.
Grades	The grade list isn't shown on this window. By default, all grades are selected for the report. If you wish to filter by grade, click on the Grades button at the bottom of the window.

Coin Information Report

This report provides a quick summary of the key attributes for a coin record.

Coin Information

Search In:

Duplicates:

Filter Method:

☒ Use the sort order in the report profile

Date Conditions:

☐ Include only coin records for a specific period for when they were last updated

Start Date: ...

End Date: ...

Report Profile:

Matches: 0

Other than the basic filtering methods common to most searches and reports, the only difference is the report profile, which by default will contain the following information:

- Denomination
- Year
- Type/Reign
- Variety
- Mint Mark
- Unique ID (UID)
- Period
- Mintage and Proof Mintage
- Designer
- Mint Location
- Diameter, Weight and Thickness
- Composition
- Edge
- Notes/Description

- Set Coin Quantity

Note that the composition on this report is defined to be a merged version of the precious metal content percentages and the other composition information. This is to keep the report similar to what was provided in EzCoin version 1. If you wish to see a report with the precious metal content in separate fields, you should create a custom profile and assign it to the report.

Customized Data/Records Report

For countries which contain pre-supplied data from SoftPro, you may have customized records where some of this pre-supplied information isn't the same, or in the case of custom coin varieties, isn't available.

Customized Data/Records Report

Search In: Modified Supplied Data

Duplicates: All Entries

Filter Method: Unfiltered (All Coins)

☒ Use the sort order in the report profile

☐ Main numbers only

Date Conditions:

☐ Include only coin records for a specific period for when they were last updated

Start Date: [] []

End Date: [] []

Report Profile: Customized/Pre-supplied Data Differences

Reset Sort Order... Find Show Cancel

Matches: 0

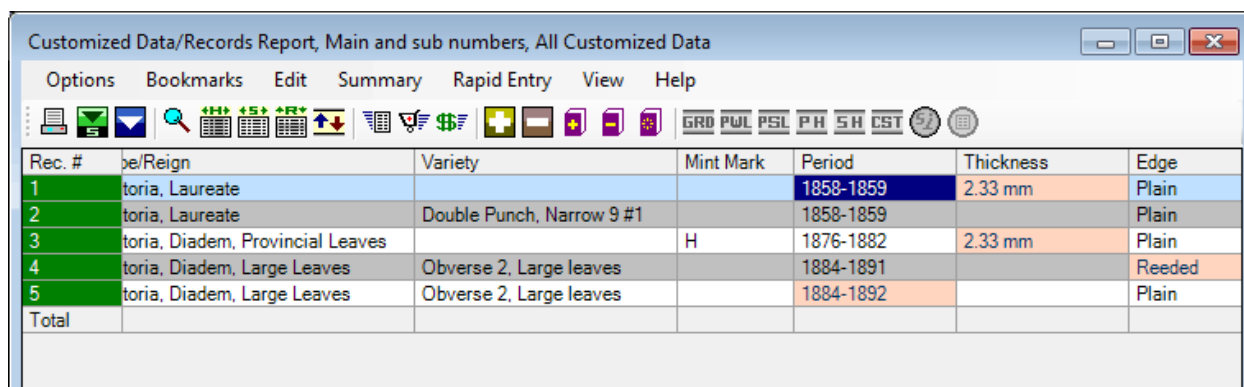
The **Search In** condition is slightly different for this report type.

All Customized Data: Includes modified pre-supplied records (where at least one field of data has been altered) and any custom variety coin records (no pre-supplied data at all).

Modified Supplied Data: Only report on pre-supplied coin record differences.

Custom Varieties: Only report on coin varieties which have no pre-supplied information.

The report format will also be slightly different than standard reports. Any field which contains a value which is modified from a pre-supplied version will be displayed in the report and automatically shaded in a different color to indicate this scenario.



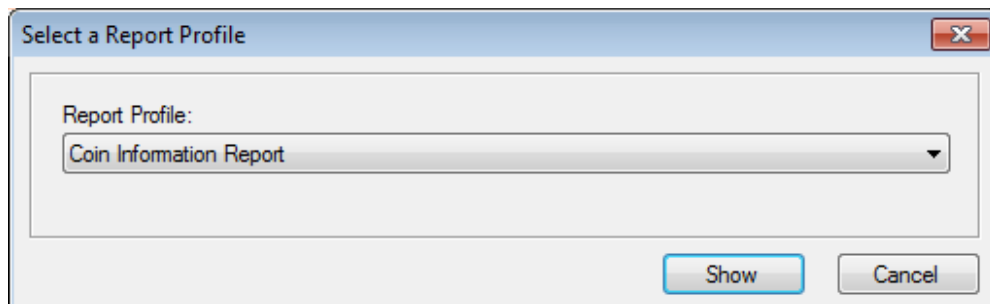
Rec. #	Type/Reign	Variety	Mint Mark	Period	Thickness	Edge
1	Storia, Laureate			1858-1859	2.33 mm	Plain
2	Storia, Laureate	Double Punch, Narrow 9 #1		1858-1859		Plain
3	Storia, Diadem, Provincial Leaves		H	1876-1882	2.33 mm	Plain
4	Storia, Diadem, Large Leaves	Obverse 2, Large leaves		1884-1891		Reeded
5	Storia, Diadem, Large Leaves	Obverse 2, Large leaves		1884-1892		Plain
Total						

Navigation List Report

Navigation Lists are simply a list of coin records maintained by EzCoin and accessible using the violet arrow buttons in the main toolbar. These lists can be generated from the Report Viewer, Tag Lists, Coin Lists, and Searches. A navigation list has no special formatting characteristics – it's just a collection of coin records based on the 5 key fields of denomination, year, type/reign, variety and mint mark.

Since a report profile represents the presentation style and printing attributes for a report, you can attach a report profile to a navigation list to generate an ad-hoc report for the coins in the list.

You can find the ad-hoc reporting option from the **Navigation List** submenu under the **File** menu.

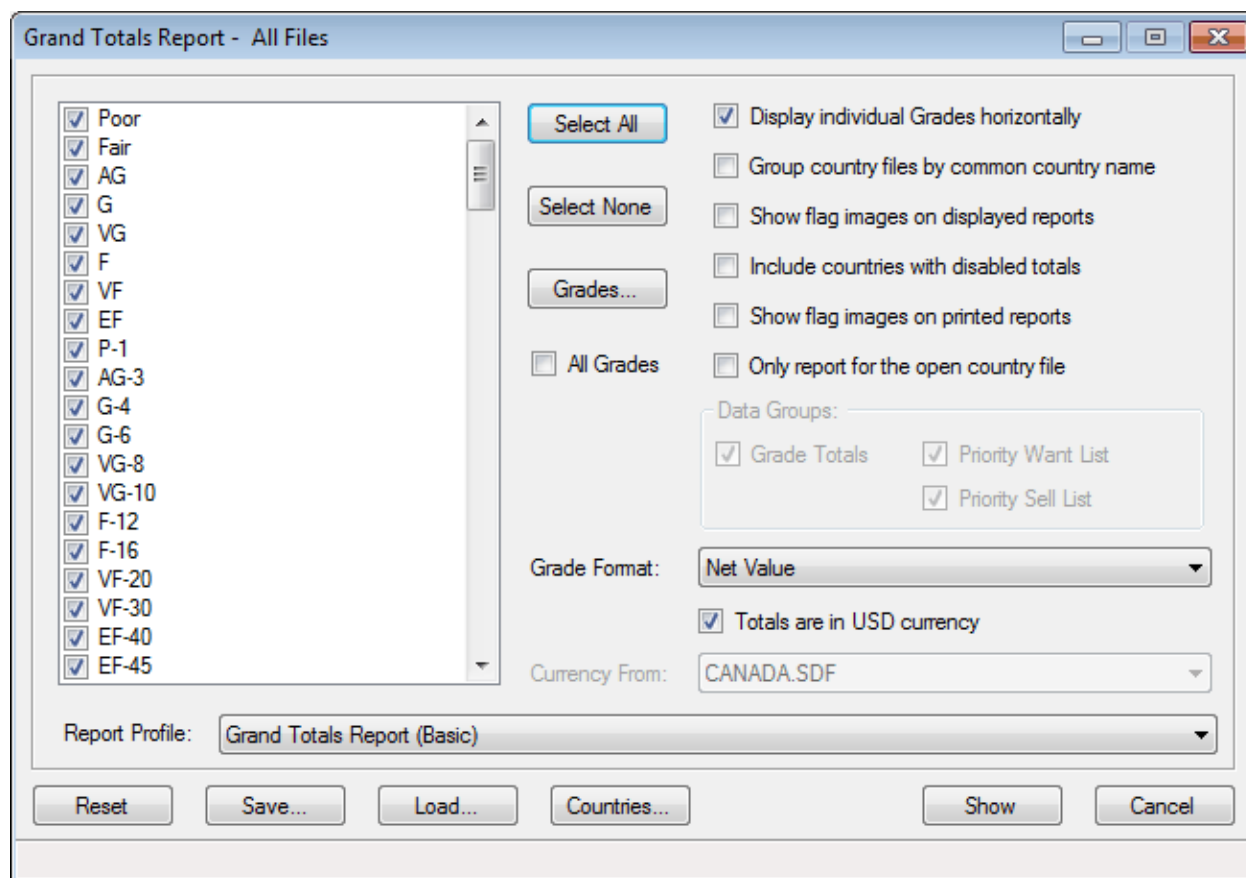


Choose a report profile (every pre-supplied and custom report profile is available in the drop down list) and click **Show** to bring up the Report Viewer.

Grand Totals Report

The grand totals report provides summary statistics for all country files installed and registered with your copy of EzCoin. For a country to appear in the report, you must have opened it at least one time. By default all countries are un-registered until the first time you open them.

The grand totals report uses a unique dialog window for the search input conditions as shown below.



Report Orientation

The Horizontal format will show one line of information for each country file across the report. The Vertical format will show grade information vertically, similar to the Inventoried Grades Search report.

There are 2 separate menu options under the **Reports** menu for each format type.

Grade Selection

The grade checkbox list is used to filter the grades which will appear on the report. The **Grades** button can be used to select from pre-defined grade groups. The **All Grades** checkbox can be used to show all grades on the report and the grade list selection will be ignored.

Country Selection

By default all registered countries are included in the report. If you want to show totals for specific countries, then click on the **Countries** button. Note the title bar at the top of the search window. It indicates how many countries are available and how many will appear in the report. If a country isn't registered (i.e., opened at least one time) or there are no inventoried records on the country, then it will be excluded from the report.

Country Exclusion

The **County Settings** dialog accessed from the **File** menu allows you to turn off visibility of a country in a grand totals report. This can be useful for alternate working copies of a master country file.

Report Attributes

Report for the Open Country File	If checked this option will restrict the report to the current open country file only.
Group by Common Country Name	If you have several country files based on a single country of origin (i.e. USA), checking this option will take the totals for all of the country files of that origin and show results as a net sum under a single row in the report.
Include Countries with Disabled Totals	The Country Settings window allows you to disable any country file from showing its totals in the report. If you check this option, then every country file will be included in the report even if disabled at the country file settings level.
Show Flag Images in the Report Viewer	Check this to display flag images in the on screen report viewer.
Show Flag Images on Printed Reports	Check this to print the flag images on your reports.
Display Individual Grades Horizontally	This option will enable the display of totals for each grade across the report. This option is disabled for a Vertical Format report, as this information would always be shown.
Data Groups	Data groups apply to the horizontal report format only. These checkbox options will filter the types of data in the report. For example, if you only want to see summary statistics for grade information, then uncheck all but Grade Totals. Note that purchase and sell history information are part of the Grade Totals

	option.										
Currency Selection	By default, a GT report will show totals based on USD (USA) currency conversion rates. If you want to display the totals based on the conversion rate of a different country, then uncheck the USD option and select a country from the drop down list.										
Grade Format for Horizontal Grades	<div>This drop down list will be enabled when you choose to display grades horizontally. You have the following display choices:</div> <table><tr><td>Net Value</td><td>Coin Quantity</td></tr><tr><td>Net Profit</td><td>Record Quantity</td></tr><tr><td>Purchase Price</td><td>Grade Qty + Net Value</td></tr><tr><td>Sell Price</td><td>Coin Qty + Net Value</td></tr><tr><td>Grade/Item Quantity</td><td>Record Qty + Net Value</td></tr></table>	Net Value	Coin Quantity	Net Profit	Record Quantity	Purchase Price	Grade Qty + Net Value	Sell Price	Coin Qty + Net Value	Grade/Item Quantity	Record Qty + Net Value
Net Value	Coin Quantity										
Net Profit	Record Quantity										
Purchase Price	Grade Qty + Net Value										
Sell Price	Coin Qty + Net Value										
Grade/Item Quantity	Record Qty + Net Value										

Running the Report

Once you have chosen all the input conditions for the report, click on the Show button. Depending on the orientation of the report, you will get a view in either the horizontal or vertical format. An example of each format is shown below. For options available in the menu, refer to the Report Viewer section of the manual.

Example screens for both formats are shown below.

Setting Value Types for Individual Grades

For the horizontal report format with individual grade totals enabled, you can change the type from the **Totals** menu without having to re-run the report.

Horizontal Display Format

Grand Totals Report - Net Value

Options View Totals Help

	File Name	Grade Qty	Net Worth	Buy Qty	Net Buy	Sell Qty	Net Sell	Net Profit	VF	G-4
1	CANADA	148	\$228,755.53	38	\$1,254.46	1	\$123.45	\$-333.33	\$5.00	\$36,179.95
2	USA	3	\$2,456.00							
Total		151	\$231,211.53	38	\$1,254.46	1	\$123.45	\$-333.33	\$5.00	\$36,179.95

Vertical Display Format

Grand Totals Report

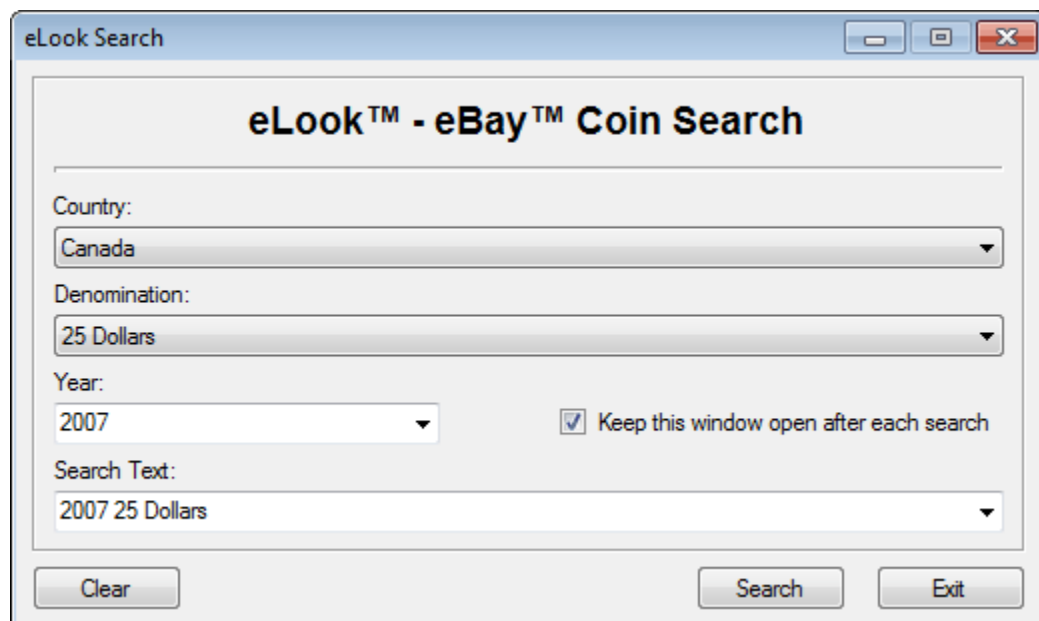
Options View Help

	File Name	Description	Grade/Type	Record Count	Item Count	Coin Count	Net Worth
1	CANADA	Canada 2011 Database	MS-60	1	1	1	\$2,092.75
1			Priority Want List	3	2		
1			Priority Sell List	2	1		
2	USA	USA 2011 Database	MS-60	7	7	7	\$15.80
2			MS-63	67	69	69	\$117.20
2			MS-64	17	18	18	\$249.50
2			MS-65	34	39	39	\$318.64
2			MS-67	1	1	1	\$39.75
2			MS-69	5	5	5	\$790.00
2			MS-70	4	4	4	\$75.00
Total				141	147	144	\$3,698.64

eLook™

This feature allows you to perform an eBay™ search using your default Internet browser. This option is available in the **Search** menu under **eLook™** (or use the **Ctrl + E** shortcut key).

For version 1 users of EzCoin, this search system has been carried over into version 2 with minimal change. The Preferences option from version 1 with the eLook™ Fill Method has been removed and replaced with a search history drop down list instead.



The current country selected in the drop down list is based on the current file opened in EzCoin. Note that custom countries which are not derived from a valid world country reference provided by SoftPro will not be valid for eLook™.

The denomination and year list is taken from the current open country file and will not change, even if you choose a different country from the drop down list. You will need to manually insert the year and denomination information into the search text if the new country selected doesn't have a suitable value in the drop down. The drop down lists are an aid for the current open country only to pre-populate the search text.

Click on the **Search** button to perform the appropriate search. EzCoin will launch your default Internet browser to point to the corresponding web page with the matching search conditions.

Check the *Keep this window open* option to leave the dialog window open after running the search. This allows you to perform multiple searches.

The search text drop down list keeps a record of all of your previous searches in most recent used order by country. You can clear the search history for the current country by clicking on the **Clear** button.

EzCoin Report Viewer

All searches and reports have a display option to show the data in a **Spreadsheet Viewer**.

Search In: All Coins

Duplicates: All Entries

☒ Use the sort order in the report profile
☐ Main numbers only

☒ 1: Show in Spread Sheet Viewer
☐ 2: Show in Data Browser
☐ 3: Show in Thumbnail Viewer
☐ 4: Save as a Navigation List
☐ 5: Show in Main Window

The report viewer shows coin records in a row and column grid format much like a spreadsheet. An example for the Coin Information Report search is shown below.

The **Data Browser** option available from the Search and Report menus is a scaled-down version of the report viewer, without any data manipulation capabilities.

Coin Information, Main and sub numbers, All Coins

Options Bookmarks Edit Summary Rapid Entry View Help

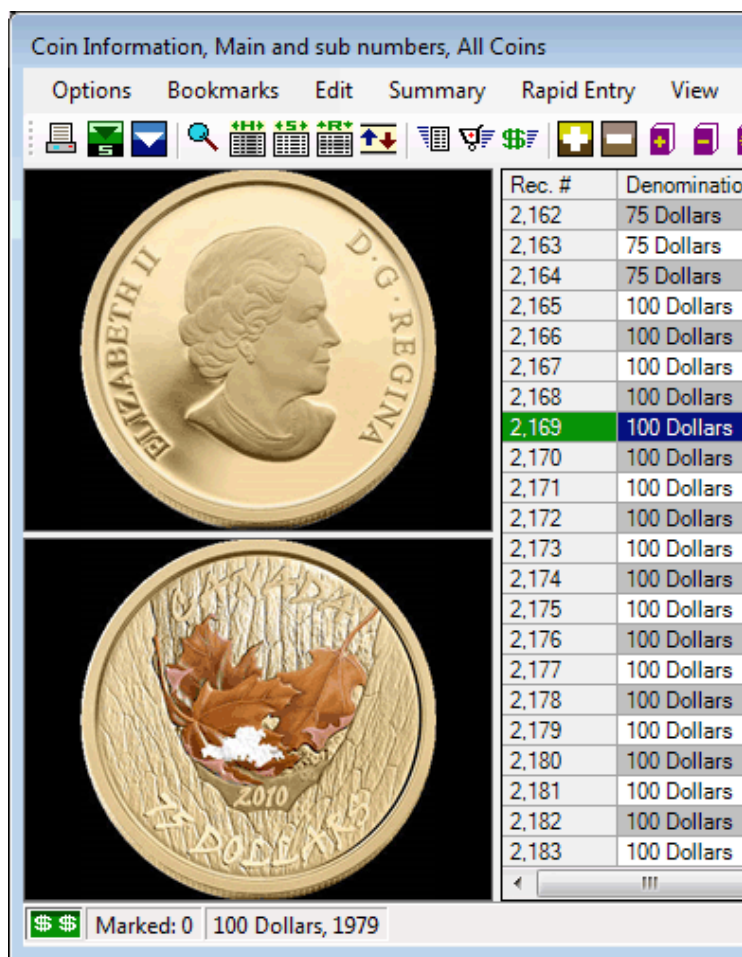
Rec. #	Denomination	Year	Type/Reign	Variety
1	1 Cent	1858	Victoria, Laureate	
2	1 Cent	1859	Victoria, Laureate	Brass
3	1 Cent	1859	Victoria, Laureate	Double Punch, Narrow 9 #1
4	1 Cent	1859	Victoria, Laureate	Double Punch, Narrow 9 #2
5	1 Cent	1859	Victoria, Laureate	Narrow 9, All Forms
6	1 Cent	1859	Victoria, Laureate	Wide 9 Over 8
7	1 Cent	1876	Victoria, Diadem, Provincial Leaves	
8	1 Cent	1881	Victoria, Diadem, Provincial Leaves	
9	1 Cent	1882	Victoria, Diadem, Provincial Leaves	Obverse 1
10	1 Cent	1882	Victoria, Diadem, Provincial Leaves	Obverse 2
11	1 Cent	1884	Victoria, Diadem, Large Leaves	Obverse 1, Large leaves
12	1 Cent	1884	Victoria, Diadem, Large Leaves	Obverse 2, Large leaves
13	1 Cent	1886	Victoria, Diadem, Large Leaves	Obverse 1, Large leaves
14	1 Cent	1886	Victoria, Diadem, Large Leaves	Obverse 2, Large leaves
15	1 Cent	1887	Victoria, Diadem, Large Leaves	Obverse 2, Large leaves
16	1 Cent	1888	Victoria, Diadem, Large Leaves	Obverse 2, Large leaves
17	1 Cent	1890	Victoria, Diadem, Large Leaves	Obverse 3, Large leaves
18	1 Cent	1891	Victoria, Diadem, Large Leaves	Obverse 2, Large Date, Large leaves
19	1 Cent	1891	Victoria, Diadem, Large Leaves	Obverse 2, Small Date, Large leaves
20	1 Cent	1891	Victoria, Diadem, Large Leaves	Obverse 3, Large Date, Large leaves
21	1 Cent	1891	Victoria, Diadem, Large Leaves	Obverse 3, Small Date, Large leaves
22	1 Cent	1891	Victoria, Diadem, Small Leaves	Obverse 2, Small Date, Small Leaves

SS Marked: 3 1 Cent, 1884 Victoria, Diadem, Large Leaves

The viewer consists of a menu, toolbar, status bar, and a data grid showing the coin report data. Color coding of grid cells and the row tabs is shown in the above

example. The color coding serves as visual cues for specific attributes about the data in the grid.

An image preview window can be toggled on or off using the F12 key. When turned on, the image preview pane will appear on the left. The width of the window is divided between the image and the data grid. You can drag the divider between the two areas to make the image area smaller or larger.



The title bar at the top of the viewer window shows as many of the search input conditions as will fit. An option is available under the **Help** menu (**View Report Title**) to see all of this information in a separate dialog window.

Record Tab Color Coding

The leftmost column of the data grid is fixed and contains the record number. The color of this tab indicates a specific status of the record as follows (**Note:** this manual refers to the default colors, which can be changed using the EzCoin general preferences).

Green	The record is part of your inventory.
Blue	The record has at least one column which matched on a search string using the Find menu option.
Red	The record has been book marked.
Green + Red	The record is inventoried and book marked. The tab cell will be a half-and-half color fill.
Default	<p>The normal color used for data grid header labels based on your current Windows color scheme indicates a pre-supplied coin record not part of your inventory.</p> <p>Under Data Browse viewing, no color coding is used so the row tabs will always be this color as well.</p>

Column Header Color Coding

The column headers which run across the top of the data grid normally use a basic default label color consistent with your Windows color scheme. If you are displaying Data Groups in your report profile, the header captions will be color coded to match the type of data group, and will be colored for only the columns which are part of the group. You can change these colors using the EzCoin general preferences.

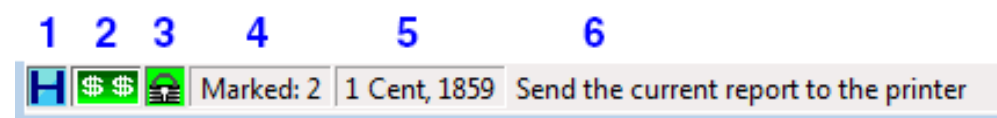
Green	Inventoried Grade data group – each column under this color will be one of the separate attributes associated with individual grades assigned to the coin record.
Violet	Priority Want List data group – fields which are part of coins added to the list.
Blue	Priority Sell List data group – fields which are part of coins added to the list.
Yellow	Purchase history data group.
Orange	Sell history data group.
Default	For any columns not part of a data group, or when using Data Browse view mode.

Special Color Coding of Data Cells

The data value for a specific row cell within the grid can be color coded to indicate a special status. Normally, all data grids in EzCoin (for all windows) alternate the row colors: White for odd rows, Gray for even rows. In addition, a cell may be shown with the following colors.

2	Show the selected coin record on the main screen.
3	Close the report viewer.
4	Find a value in the data grid.
5	Hide selected columns.
6	Show all hidden columns.
7	Remove selected coin records from the report (does not remove from inventory, only the report view).
8	Sort the report based on the selected column.
9	Perform rapid multi entry on the bookmarked/selected coins.
A	Perform rapid entry into the Priority Want List.
B	Perform rapid entry into the Priority Sell List.
C	Add the bookmark/selected coins to your inventory.
D	Remove the bookmark/selected coins from your inventory.
E	Add the selected coins to your bookmark list. Hold down Ctrl to add everything.
F	Remove the selected coins from your bookmark list. Hold down Ctrl to invert the bookmarked selection.
G	Clear the bookmark list.
H	<p>Data presence indicator for inventoried grade information. This indicator will be gray when there is no current data. Click on the button to perform a quick edit.</p> <p>Note: Indicators under items H to M in the toolbar are not active unless you select a single coin record.</p>
I	Data presence indicator for the Priority Want List.
J	Data presence indicator for the Priority Sell List.
K	Data presence indicator for the Purchase History.
L	Data presence indicator for the Sell History.
M	Data presence indicator for Custom Fields.
N	If this button is enabled, then special information (for pre-supplied coins from SoftPro) is available for viewing.
O	If this button is enabled, then special notes (for pre-supplied coins from SoftPro) is available for viewing.

Report Viewer Status Bar



1	If any columns are hidden in the current report profile, this icon will appear. Hidden status is retained even after the report viewer is closed down and is unique for each profile. You can click this icon to unhide all hidden columns.
2	This is the coin inventory status icon. Refer to the main EzCoin window status bar help for the various icon types.
3	This icon will appear if the selected coin is price locked.
4	When you bookmark coin records, this indicator will reflect how many coins are in the bookmark list.
5	The denomination and year of the selected coin record is shown here, assuming only one record is selected.
6	If you are selecting individual cells with the mouse, the cell contents are copied to the status bar in this area. Otherwise, this area contains progress and help hint messages.

Report Viewer Menu Options

The Report Viewer (a.k.a. Spreadsheet Viewer), Data Browser, and Grand Totals Report View all share some common functionality, as they use the same viewer window. Data Browser and Grand Totals Viewers have limited functionality compared to the Report Viewer, and many of the options described in the next several sections will not appear with the latter two viewing modes.

The following table is a quick summary of the menu options. Each of these will be described in detail in separate help topics. Use the links at the end of this topic to see additional information for each menu group.

Menu	Item	Shortcut	Description
Options	Show in Main Window	F5	Show the selected coin record in the main EzCoin application window.
Options	Show as Thumbnail View	F6	Show the report in the thumbnail viewer.
Options	Assign as new Navigation List	F7	Assign the report to the Navigation List.

Menu	Item	Shortcut	Description
Options	Assign to Coin List	F8	Assign the report to the coin list viewer.
Options	Print	Ctrl + P	Print the report.
Options	Change Report Profile	F10	Change to a new report profile.
Options	Show Image Preview	F12	Toggle the image preview pane on and off.
Options	Show Comments Preview	Ctrl + F12	Toggle the comments preview pane on and off.
Options	Create Snapshot	Ctrl + S	Create a snapshot file from the report.
Options	Clear Image Cache	Ctrl + Shift + C	Clear the thumbnail image cache.
Options	Report Merge		Report merging menu.
Options	Exit	Ctrl + Esc	Exit the viewer.
Bookmarks	Add Selection	Ctrl + B	Add the selected coin records to the bookmark list.
Bookmarks	Remove Selection	Ctrl + Del	Remove the selected coin records from the bookmark list.
Bookmarks	Add Everything	Ctrl + Shift + A	Add the report to the bookmark list.
Bookmarks	Invert Bookmark List	Ctrl + Alt + B	Reverse the bookmark selection.
Bookmarks	Clear Bookmark List	Ctrl + Shift + B	Clear the bookmark list.
Bookmarks	Save as Navigation List	Ctrl + N	Assign the bookmark list to the Navigation List.
Edit	Quick Add to Inventory	Ctrl + I	Add to your inventory.
Edit	Remove from Inventory	Ctrl + Shift + I	Remove from your inventory.
Edit	Grade Quick Edit	Ctrl + G	Quick edit for inventoried grades.
Edit	Priority Want List Edit	Ctrl + F1	Quick edit for PWL data.
Edit	Priority Sell List Edit	Ctrl + F2	Quick edit for PSL data.
Edit	Purchase History Edit	Ctrl + F3	Quick edit for purchase history.
Edit	Sell History Edit	Ctrl + F4	Quick edit for sell history.
Edit	Lock Pricing	Ctrl + L	Lock pricing on coins.
Edit	Unlock Pricing	Ctrl + U	Unlock the locked pricing.

Menu	Item	Shortcut	Description
Summary	Supplied Data	Alt + F1	View/edit pre-supplied data fields.
Summary	Your Data	Alt + F2	View/edit your data fields.
Summary	Custom Fields	Alt + F3	View/edit custom data fields.
Summary	Special Information	Alt + F4	View notes and special information.
Summary	Images	Alt + F5	Run the image links editor.
Summary	Comments	Alt + F6	View/edit comments for the coin record.
Summary	Shows Differences from Supplied	Alt + F7	Toggle pre-supplied color differences on the data grid.
Rapid Entry	Rapid Inventory		Perform Rapid Multi Entry of all selected or bookmarked records and add to your inventory.
Rapid Entry	Priority Want List		Perform rapid entry for selected/marked coins to the Priority Want List.
Rapid Entry	Priority Sell List		Perform rapid entry for selected/marked coins to the Priority Sell List.
View	Sort Ascending Order	Ctrl + 1	Sort the report on the selected column.
View	Sort Descending Order	Ctrl + 2	Sort the report on the selected column.
View	Reset Sort Order	Ctrl + 3	Restore the original sort order.
View	Hide Selected Columns	Ctrl + H	Hide all selected columns.
View	Auto Hide Empty Columns	Ctrl + Alt + H	Hide any columns which have no data in them.
View	Unhide All Columns	Ctrl + Shift + H	Show all columns which were hidden.
View	Remove Rows	Ctrl + R	Remove rows from the report. Note: this doesn't remove coin records from your country file.
View	eLook™ Search	Ctrl + E	Perform an eLook™ search.
View	Find	Ctrl + F	Perform a text search on the data grid.

Menu	Item	Shortcut	Description
View	Find Next	F3	Find the next occurrence of the search text.
View	Find Previous	Shift + F3	Find the previous occurrence of the search text.
View	Clear Find	Ctrl + Shift + F3	Reset the text search.
View	Reset Column Widths	Ctrl + W	Restore all report column widths to default values.
Help	Report Viewer Context Help	F1	Context sensitive help for the viewer.
Help	EzCoin General Preferences	F2	Show the EzCoin general preferences dialog window.
Help	View Report Title	Ctrl + T	Show all the input conditions for the search data which generated the report results which can't fit within the window's title bar.

Options Menu

Navigation List (F7), Coin List (F8) and Thumbnail Viewer (F6)

You can assign the entire report to one of the alternate report view methods using the options available under **Options**. When you assign the report, the viewer will close. If thumbnail view mode or coin list modes are chosen, the corresponding window will be displayed with the report data. For navigation list assignment, any current list will be discarded and replaced with the report data.

If you want to assign a subset of the report, create a bookmark list, and only the bookmarked coin records will be assigned.

Printing Reports (Ctrl + P)

EzCoin will use the printer settings in the current report profile (RPT) file assigned. The standard printer settings for most report profiles are as follows:

- Landscape orientation.
- The current default printer defined in your version of Windows.
- The current default paper size and print quality for this printer.
- Half-inch margins on the left and right, with 1 inch margins top and bottom.
- Arial font varying between 8 and 10 points.
- Multi-page format, with Denomination and Year columns repeating on each page across.

- No alternate color banding on data rows – the report is plain black text on a white background.

EzCoin has a general preferences option to enforce the following global settings, which will override all report profile settings. These options are available in the **Printer Setup** tab.

- Printer to send the report to.
- Paper size.
- Orientation.
- Margins.
- Column width auto-sizing.
- Column width fill mode for fit-to-page reports.

Use the print icon, or choose **Print** from the **Options** menu option to begin. The standard Windows printer settings dialog will appear, allowing you to choose the printer, page range, and number of copies.

EzCoin does not pre-calculate the pages as the choice of printer and any changes made to Properties within the printer setup dialog window can result in different page totals. In addition, collating copies is not allowed in EzCoin. If you specify 3 copies, then each copy will be printed in turn before the next copy.

EzCoin will send the report using whatever color settings you define in the report profile, provided that the printer you chose supports color output.

EzCoin relies on the Windows spooler to accumulate the report data and print it in the background. Until all the pages are sent to Windows to print, you will not be able to perform other tasks in EzCoin. A progress dialog will appear to indicate the printing status. You can click on the **Cancel** button to stop printing at any time.

Reports can be printed in one of 3 formats:

- Multi-page: The columns of the report span multiple pages wide.
- Staggered: The report is one page wide, and columns wrap to multiple rows.
- Fit-to-Page: The report columns must fit into one page width.

Note: There is a 4th report type, *On-Screen Only*, which disables all printing attributes and can only be used for the report viewer without printing.

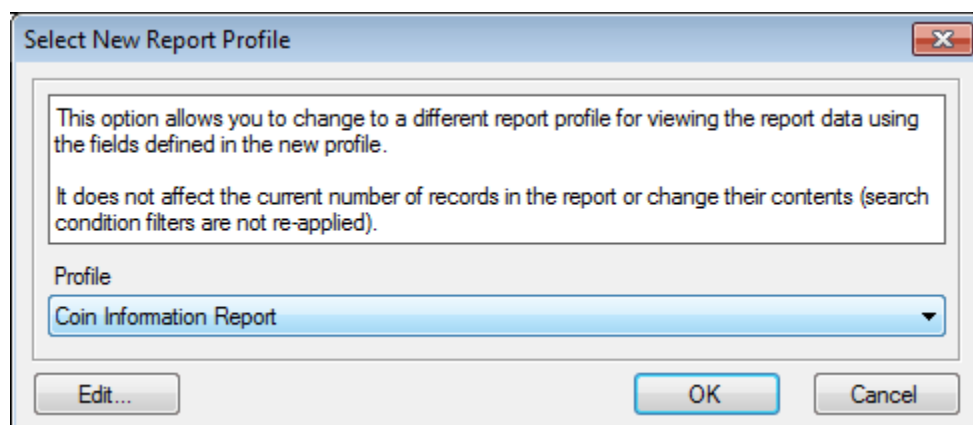
Fit-to-Page reports must not contain too many columns of data, or the scaling needed to fit the report onto a single page width will be too great to be printed with a readable font size. If this happens, you will be informed that the report can't fit the page width. You can either adjust font sizes, paper width, remove/hide columns, or change to a multi-page format.

Reports and Images

The default report profiles do not contain any image fields. However, image fields can be attached to any custom report and displayed in both on screen and printed reports. Preference options determine what the image size will be on screen (pixel dimensions) and what it will be on printed reports (width and height in inches). The quality of the images displayed and printed can also be adjusted.

Changing the Profile (F10)

Every search and report item in EzCoin has a default report profile file (RPT) associated with it. These profiles can be changed from within the drop down list which appears in the input condition window. Since a profile represents the display characteristics and field list for reports and the data itself is independent of this profile, EzCoin allows you to swap out profiles on the fly using the **Change Report Profile** option.



Select a new profile from the drop down list and click **OK**. The **Edit** button can be used to run the custom report editor.

Profile switches don't affect the default profile associated with any menu option under the main EzCoin **Search** or **Reports** menus – i.e., if *Default Coin Information* was the profile used to run the report, it will remain so even after switching profiles within the viewer.

Profile Settings (Widths and Hidden Columns)

The report viewer bases the default widths for columns on the master field definitions shared among all report types in EzCoin. These field definitions can be edited using one of the Field Editor options under the Utility menu. There is a width setting for displayed information and a width setting for printed reports.

Since the displayed reports have no physical limitation on the total width available to show a report (printed pages can't have scroll bars) the default width may not always show the full information and the field will be cropped on the right.

You can adjust this by double clicking the divider in the header caption row between two fields or simply click and drag the divider area to make the column larger or smaller.

EzCoin will remember the width of a column even after you close the viewer window and use it for the next time you run the report. The widths are saved on a per report basis, meaning that you can use a different width for Denomination on different reports. The settings are saved under the Profiles\Settings folder in the EzCoin application path.

You can also choose to hide columns from the report by using the Hide/Show buttons in the toolbar. Hidden columns will not appear in the data grid and will not be printed. The data is still present in the report – you can bring the fields back into view by clicking the icon to reshown all hidden columns. As with the column widths, the hidden status of the columns are also preserved when you close the viewer window.

Image Preview Pane (F12)

This option will toggle the image preview pane which appears to the left of the main data grid. Images will only appear if you have selected exactly one coin record.

You can resize the image pane by dragging the divider bar between the left side of the data grid and the right side of the image window. The new width will be saved after the report viewer window is closed.

Comments Preview Pane (Ctrl + F12)

This option will toggle the comments preview pane which appears below the data grid. Comments will only appear if you have selected exactly one coin record and the record contains comments. By default a Comments report will show this pane when the viewer starts. For all other report types, the initial visibility is based on if the images were displayed at the time you closed the viewer window.

Comments fields in the main data grid can only show a limited amount of text information. The remainder can be displayed using either the comments pane or the **Comments** option under the **Summary** menu. The latter choice provides full editing capability.

You can resize the height of the comments pane by dragging the divider bar between the bottom of the data grid and the top of the comments window. This height will be saved when you close the viewer window.

Creating Snapshot Files (Ctrl + S)

A snapshot file is a read-only capture of the report data grid. This file can be exchanged with other EzCoin users or recalled at any time to view the contents of the report.

When you create a snapshot, you will be asked for the name of the file and a description. Once entered the file will be saved to the Snapshots folder where EzCoin is installed.

To view a snapshot file, use the Snapshot Viewer under the Extras menu, or the standalone Snapshot Viewer application, available from the SoftPro Web site.

Report Merges

EzCoin provides powerful searching capabilities to drill down into the data for a country file. However, you may want to combine the search results from different reports to make unique “hybrid” report types.

Report merging doesn’t involve the fields displayed in the report viewer, but rather the underlying set of coin records which populate the data grid. When merging reports, the coin record data is combined together to generate a new set of coin records and will be displayed using the profile of the current report in the viewer. You can for example, combine a Power Search and Grades Search into a single *Power Grades Data Search*.

The first step in merging reports is to create an export of a report to combine with a second report. There is no limit to the number of combines you want to make. However, you have to export each previous report to combine with one which follows. If you want to use the results of a power search to filter the results of a Grade Search report, then you would perform the following steps:

- Run a Power Search and display in the report viewer.
- Choose **Export this Report** from the **Report Merge** submenu.
- Run a Grade Search report and display it in the report viewer.
- Choose one of the merge options under the Report Merge submenu.

Add	Coin records are combined to make a new report with the unique records from each individual report. Duplicate entries are not created.
Subtract	Subtracts all coin records from the current report which match on the same key fields (denomination, year, type/reign, variety and mint mark) from the previous report.
Combine	Takes all coin records from the previous and current reports and discards any records which are not common to BOTH reports.

Report Viewer Image Cache (Ctrl + Shift + C)

If Image Caching is enabled in the EzCoin general preferences, then small thumbnail images of the coin records are cached to files for faster navigation of the report. Image caches are only used for reports where the field profile contains one or more coin image links.

A general preference option allows EzCoin to auto-clear the cache when the application is closed down. If this option is disabled, then the cache files will remain within the EzCoin installation path until they are cleared.

The preferences window provides a Clear Cache option. The report viewer has a similar option to perform the same task. You should consider clearing the cache if you change the cell size for images in the report viewer, as the cached images will be scaled to the previous cell size before you changed it to a new size.

Bookmarks Menu

Creating Bookmarks (Ctrl + B)

Bookmarks are used to tag specific coin records in the viewer. The record # column on the left side of the data grid will be highlighted (default color is red) to show which records are bookmarked. There are many options in the report viewer which make use of selections and bookmarks according to the table below.

Viewer Option	Selected Records	Bookmarked Records
eLook™	Yes	
Quick Inventory	Yes	Yes
Remove from Inventory	Yes	Yes
Pricing Lock	Yes	Yes
Pricing Unlock	Yes	Yes
Rapid PWL Entry	Yes	Yes
Rapid PSL Entry	Yes	Yes
Add to Bookmarks	Yes	
Remove from Bookmarks	Yes	
Save Navigation List		Yes
Hide Report Rows	Yes	Yes
Creating a Snapshot		Yes
Assign to Coin List		Yes
Show as Thumbnails		Yes

To add to the current bookmark list choose the **Add Selection** option under the **Bookmarks** menu. You can also click on the add bookmark icon. Right clicking this

icon will add all records to the bookmark list, as will right clicking on the clear bookmarks icon.

When creating selections in the viewer, hold down the SHIFT key to select ranges of records. Hold down the CTRL key to select individual records without affecting the current selection.

Removing Bookmarks (Ctrl + Del)

Use the **Remove** or **Clear** options to remove selected records or all records from the bookmark list. The **Invert** option can be used to mark all records which are not bookmarked and unmark all records which are bookmarked.

Saving to a Navigation List (Ctrl + N)

The Assign option in the Options menu will apply the bookmark list to the main Navigation List in EzCoin, replacing the current active list, if present. The Save option under the Bookmarks menu however will allow you to save the list to a file of your choosing. Provide a description and file name, and this will be saved to the Lists folder in the EzCoin application path, under a subfolder with the name of the current country file.

Saving to a Coin List (F8)

This option will transfer the marked records to the Coin List viewer. This is a convenient way to keep the report results available for reference while working within the main EzCoin Window.

Edit Menu

The following options are available from the **Edit** menu of the Report Viewer window.

Quick Add to Inventory (Ctrl + I)

Selected/bookmarked records will be added to your inventory. This is the same as selecting each record in the main EzCoin window and clicking the blue check mark icon to save to inventory. If the record is already inventoried, no action will be taken.

Remove from Inventory (Ctrl + Shift + I)

Selected/bookmarked records will be removed from your inventory. **Note:** If you remove a custom variety, or the country file is custom without pre-supplied values, the records will be permanently deleted and not recoverable. If the record has pre-supplied data, removing it from your inventory will reset the record back to a pre-supplied state.

Quick Edit Options for Coin Information

Each of the quick edit options shown in the table below will present you with a spreadsheet editor, much like the report viewer itself. This is the same editor you will see when using the quick edit options from the main EzCoin menu. When you save changes from the editor, the report view will update automatically to account for these changes.

Quick Editor	Shortcut	Description
Grades Quick Edit	Ctrl + G	Edit inventoried grades.
PWL Quick Edit	Ctrl + F1	Edit the priority want list.
PSL Quick Edit	Ctrl + F2	Edit the priority sell list.
Purchase History Quick Edit	Ctrl + F3	Edit the purchase history.
Sell History Quick Edit	Ctrl + F4	Edit the sell history.

Price Locking (Ctrl + L) and Unlocking (Ctrl + U)

You can lock pricing from being overwritten by EzCoin supplied data updates directly from the report viewer, using either the current record selection in the viewer or the active bookmark list. Once a record is price locked the padlock icon will appear in the status bar. Use the unlock option to remove the lock status.

View Menu

Sorting the Report Data (Ctrl +1, Ctrl +2, Ctrl + 3)

Most report columns can be sorted in the viewer when using the Spreadsheet (full edit capable) view mode. The Data Browse (read only) view mode allows for rapid sorting on any column.

Columns which can't be sorted on include any belonging to data groups (PWL/PSL lists, purchase and sell history). For these latter field types, the sort order is dictated by settings in the report profile and can't be changed on the fly when clicking the column headers in the report viewer data grid.

To sort on a specific column in the data grid, select any cell in that column and click on the sort icon. A single click will sort ascending order, and a second click will sort in descending order. Ctrl +Click the icon to reset the sort order to the default report profile order (which is generally by Denomination or Year in pre-supplied profiles).

You can also click on any column's header label at the top of the data grid without selecting any columns to sort. Use the Ctrl + 2 shortcut key to quickly set a descending sort order without the need to click icons or headers 2 times.

Hiding Columns (Ctrl + H)

The report viewer allows you to remove columns from the data grid, hiding them from both the on-screen display and also from printed reports. The data is still present in the report, it's just not visible. Select one or more columns in the data grid and click on the hide columns icon.

Un-hiding Columns (Ctrl + Shift + H)

Use this option to restore all hidden columns to the data grid. This affects the current report profile only. Hidden status is tied to the actual RPT files containing the profile settings, not to the report or search options in the main EzCoin menu.

Removing Rows (Ctrl + R)

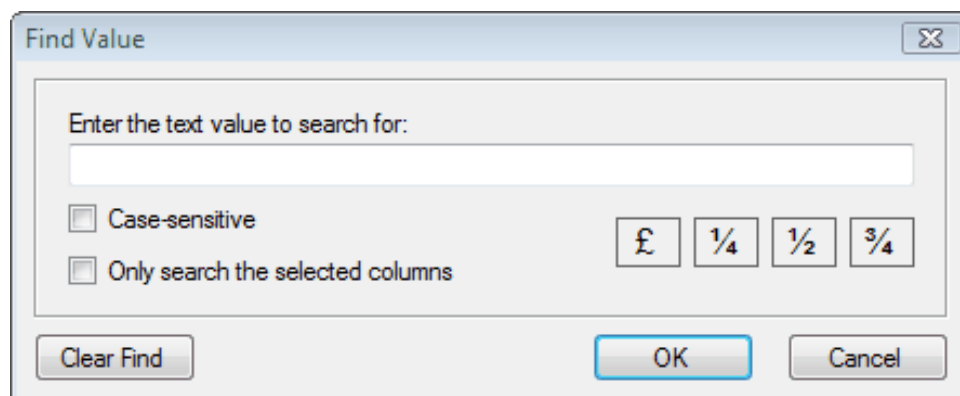
This option can be used to create a smaller report data grid without exiting the viewer. Row removal does NOT remove records from your inventory or the country file. It simply discards them in the data grid of the report. Unlike hiding columns of data, the rows can't be recovered in the report once removed – you would have to re-run the same report to get those rows back.

eLook™ Search (Ctrl + E)

This option is the same as the one accessible from the main EzCoin menu. However, you can select up to 10 coin records at one time, and this will be passed to the eLook™ dialog window as a coin group to search on.

Finding Data (Ctrl + F, F3, Shift + F3, Ctrl + Shift + F)

The find option is a simple text string matching feature allowing you to search across all rows and columns in the data grid for any coin attribute which matches on the text. The match is always a partial text match; if the text value of a coin attribute contains the text string you entered for the find, then the match is satisfied.



Check the Case-sensitive option to force upper and lower case letters to match exactly.

Check the Selected Columns option to restrict the search to data contained only in those columns.

Use the 4 special character buttons to enter those characters into the text value string at the current cursor position.

Click on **Clear Find** to remove any existing find status in the report viewer window. If you don't enter any text value and click OK, then the find status is also cleared.

Once you start a search, the data grid will be checked to find cells containing your search text. Every matching cell will be highlighted (default color yellow) to indicate a match status. In addition, the record # tab on the left (default color blue) will indicate at least one matching cell for that row in the data grid. The viewer will automatically scroll the grid to the first matching cell.

Use the **Find Next** and **Find Previous** options to step forwards and backwards through all matching cells in the data grid. Once again, the grid will automatically scroll to keep the matching cell in view.

The Find button in the toolbar provides all the functionality of the separate menu options:

- Click to start a new find.
- SHIFT + Click to clear the find status.
- Right Click to step forwards.
- CTRL + Right Click to step backwards.

Resetting Column Widths (Ctrl + W)

Each report profile (RPT file stored under the Profiles folder in the EzCoin application path) can have an associated Settings file stored in the Profiles\Settings subfolder. When using report profiles for the first time, there will be no settings file in this subfolder. As you run reports in EzCoin, these settings files are created or updated when the report viewer window closes.

The settings file only contains 2 types of information:

- The hidden column status of the data grid.
- The width of each field displayed on screen in the data grid.

When a report profile is first used against any type of search or report, the viewer will assign a default column width to each field shown in the data grid, based on settings in the Master Report Fields configuration (you can alter the default field settings using the Field Editors in the Utilities menu).

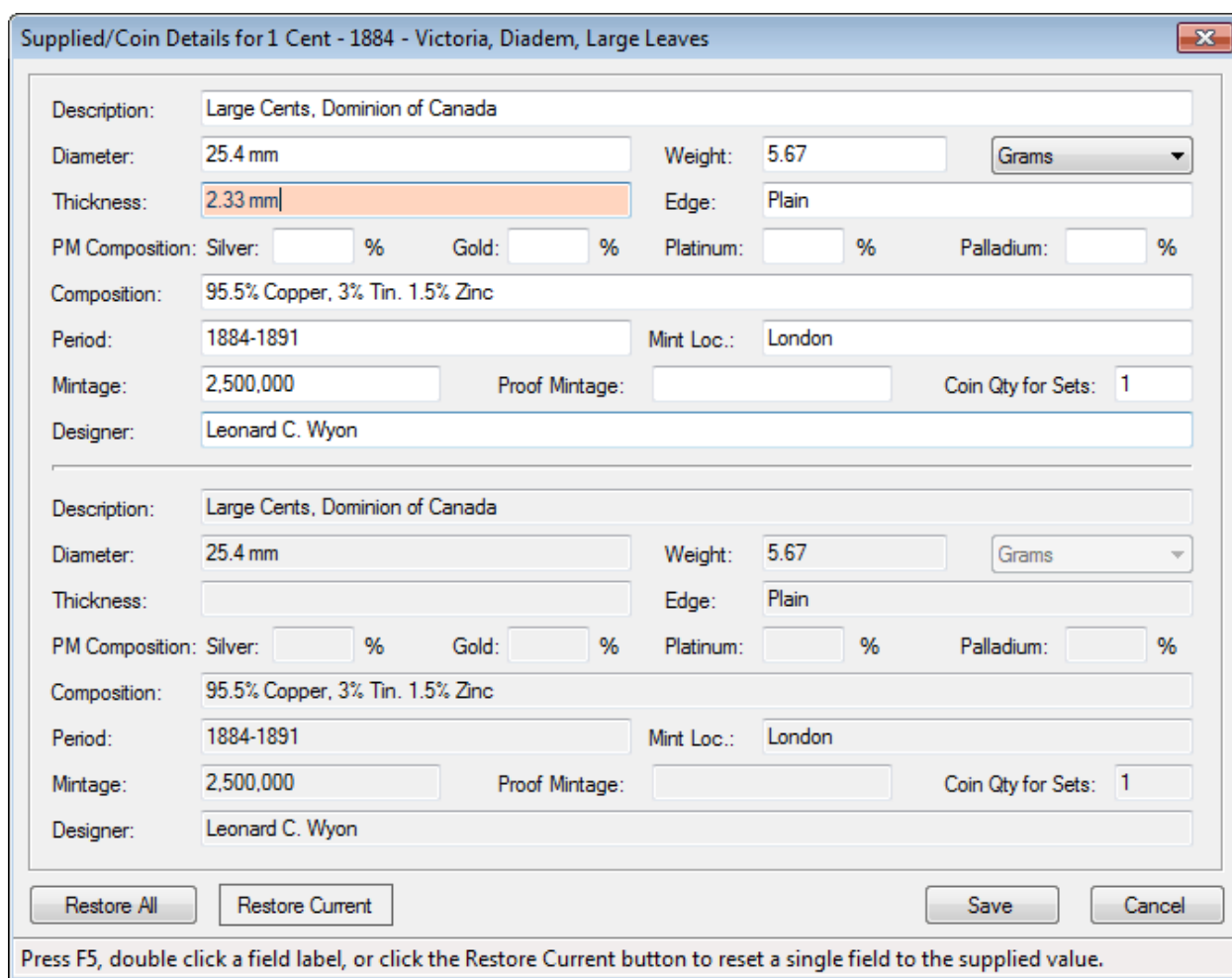
You can drag the divider bars between the data grid's column headers to resize columns on the report. The widths will be saved to the settings file when you close the viewer.

If for any reason you need to force a report profile back to default widths, choose the reset option under the **View** menu. Deleting the RST file from the Settings folder will accomplish the same thing.

Summary Menu

Supplied Data (Alt + F1)

This option displays a window which shows you differences between pre-supplied field data and the current inventoried data for a selected coin record. If the country file is custom, or the record itself is a custom variety with no pre-supplied data, the dialog window will show only one set of coin attributes instead of two.



Supplied/Coin Details for 1 Cent - 1884 - Victoria, Diadem, Large Leaves

Description:	Large Cents, Dominion of Canada		
Diameter:	25.4 mm	Weight:	5.67 Grams
Thickness:	2.33 mm	Edge:	Plain
PM Composition:	Silver: % Gold: % Platinum: % Palladium: %		
Composition:	95.5% Copper, 3% Tin, 1.5% Zinc		
Period:	1884-1891	Mint Loc.:	London
Mintage:	2,500,000	Proof Mintage:	Coin Qty for Sets: 1
Designer:	Leonard C. Wyon		

Description:	Large Cents, Dominion of Canada		
Diameter:	25.4 mm	Weight:	5.67 Grams
Thickness:		Edge:	Plain
PM Composition:	Silver: % Gold: % Platinum: % Palladium: %		
Composition:	95.5% Copper, 3% Tin, 1.5% Zinc		
Period:	1884-1891	Mint Loc.:	London
Mintage:	2,500,000	Proof Mintage:	Coin Qty for Sets: 1
Designer:	Leonard C. Wyon		

Restore All Restore Current Save Cancel

Press F5, double click a field label, or click the Restore Current button to reset a single field to the supplied value.

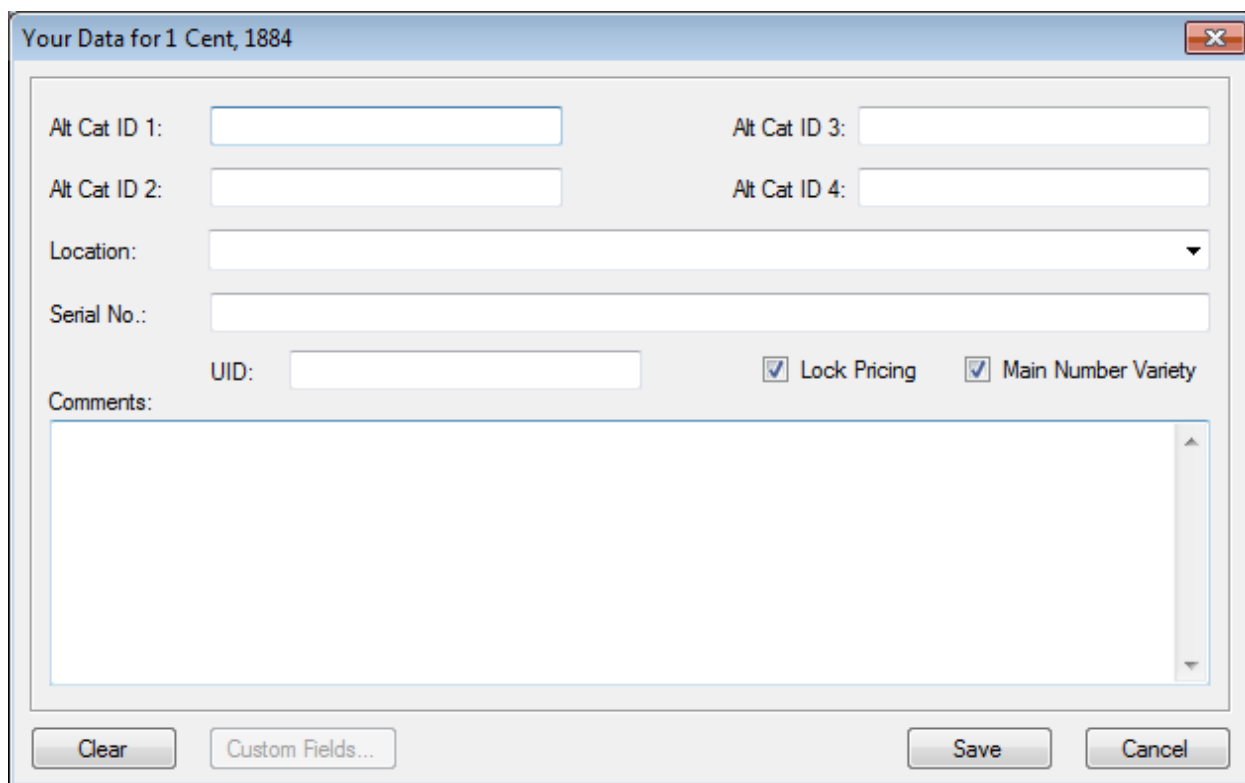
The top section shows the current value of pre-supplied fields. The bottom section is the original pre-supplied data. EzCoin maintains a read-only copy of pre-supplied fields which can't be altered. You are free to override any of them in your copy of the coin record. If a value is different, you will see the field displayed with an alternate background color, as in the Thickness field above.

You can restore one or more pre-supplied fields to their original values by clicking inside a field's text box and clicking on the **Restore Current** button, the field label to the left of the text box, or by pressing **F5**.

You can restore the entire collection of field values by clicking the **Restore All** button.

Your Data (Alt + F2)

This option shows all of the basic coin details which are not part of the pre-supplied data.



The screenshot shows a dialog box titled "Your Data for 1 Cent, 1884". It contains the following fields and controls:

- Alt Cat ID 1: [Text Box]
- Alt Cat ID 2: [Text Box]
- Alt Cat ID 3: [Text Box]
- Alt Cat ID 4: [Text Box]
- Location: [Dropdown Menu]
- Serial No.: [Text Box]
- UID: [Text Box]
- Comments: [Large Text Area]
- ☒ Lock Pricing
- ☒ Main Number Variety
- Buttons: Clear, Custom Fields..., Save, Cancel

This includes the 4 alternate catalog ID values, location, serial number, comments, and pricing lock status.

If the coin record is custom variety, then the Main Number Variety checkbox will be enabled, allowing you to switch the record between main and sub-variety status.

Custom Fields (Alt + F3)

This option shows a window containing all of the custom fields you attached to the country file. If you have no custom fields created, this option will be disabled.

Special Information (Alt + F4)

This option is identical the one in the main EzCoin window. If the special information icon is enabled in the report viewer toolbar, you can view special pre-supplied notes and coin specifications for the Scott number.

Images (Alt + F5)

This option will show the Image Links editor.

Comments (Alt + F6)

This option displays a sizeable comments dialog window, which can be used to view and edit your comments attached to the coin record.

Show/Hide Differences from Supplied (Alt + F7)

This menu option toggles special cell coloring on the data grid to indicate which pre-supplied fields have data values which are different in the inventoried data compared to what has been supplied by SoftPro.

Rapid Entry Menu

The following options are available from the **Rapid Entry** menu of the Report Viewer window. Rapid entry options allow you to perform bulk updates of selected (or bookmarked) coin records in the report viewer for inventoried coins, priority want/sell lists, and purchase/sell history.

Rapid Multi Entry for Quick Inventory (RME)

This option will add selected or bookmarked records to your inventory. Even if records are already in your inventory, they can still be updated using the RME option.

The left side of this window contains the available grades for the current country file with an associated quantity field for each grade. If you check a grade, the quantity will be set to 1 for you.

Use the **Grades** button to check multiple grades using the standard grade group selection window.

The **User Fields** button will display a window allowing you to add custom field values to the selected/bookmarked records in the report viewer.

The **Previous** button will recall the RME settings from the previous run of rapid entry you performed.

The **Clear** button will uncheck all grades in the grade list. **Clear All** will erase the contents of all fields in the RME window.

The checkbox option named **Bullion Value** is used to add grades as bullion values, ignoring the market value when determining the coin grade's net value. The checkbox option next to this will control if the bullion value is assigned based on the market value for the grade. If this option is checked, then the grade will be inventoried based on market value if it exceeds the bullion value.

The drop down list at the top determines how any selected/bookmarked records which are already inventoried will be affected by the RME operation.

Do Not	Inventoried records will not be updated by the RME.
--------	---

Update	
Replace	Replace grade and data information for existing inventoried records.
Add	Any grades which are already inventoried will be added to whatever grades are being applied from the RME operation to create net sum totals on those grades.

Click the **Inventory** button to start the Rapid Multi Entry process. When completed, the affected records will automatically be updated in the report viewer.

Rapid PWL and PSL Options

The rapid entry modes for the priority want and sell lists are used to quickly add (or remove) records based on the current selection or bookmark list in the report viewer. As these entry dialog windows are basically the same presentation format, the PWL dialog window will be used as a reference.

Rapid Priority Want List (Selected Coins: 1)

Quantity: 1 Type to Buy: None

- ☐ Poor
- ☐ Fair
- ☐ AG
- ☐ G
- ☐ VG
- ☐ F
- ☐ VF
- ☐ EF
- ☐ P-1
- ☐ AG-3
- ☐ G-4
- ☐ G-6
- ☐ VG-8
- ☐ VG-10
- ☐ F-12
- ☐ F-16

Buttons: Add to PWL, Replace Grades, Remove Grades, Remove PWL, Grade Select..., No Grades, Cancel

The choices you make in this dialog will be applied to all selected (or bookmarked) coin records in the data grid. You can specify the quantity and type to buy (or sell). There is no requirement to enter a type or check off a grade. In this case, the coin record is entered into the list as a generic status of "any grade, no type specified".

Use the **Grade Select** button to select grades from the pre-defined grade group lists. Click on **No Grades** to uncheck all grades in the checkbox list.

The 4 buttons above the grade buttons provide the choices on how to update the PWL or PSL.

Add to PWL	Add the grades selected to the existing PWL/PSL grades currently in the list under the coin record's Scott/Alternate catalog ID number. If no grades are selected, the record will be added to the PWL/PSL if not already present.
Replace Grades	Remove any grades from the PWL/PSL on the coin record which are NOT selected in the checkbox list and add any grades which ARE in the checkbox list. If the coin record is not currently in the PWL/PSL, it will be added.
Remove Grades	Remove only selected grades in the checkbox list without removing other grades currently in the PWL/PSL. This option will NOT remove the coin record from the PWL/PSL unless all grades have been removed for the coin.
Remove PWL	Remove the coin record from the PWL/PSL and any grades which may be present for this record (complete removal).

Rapid Entry for Purchase and Sell History

The rapid entry modes for the purchase and sell history provide for a quick method to perform a bulk update for multiple coin records and grades.

You must select or bookmark the coin records you wish to update. The below example dialog is for the sell history rapid entry.

The choices you make in this dialog will be applied to all selected (or bookmarked) coin records in the data grid. You can specify any of the history record attributes. The only mandatory fields which require a value are Quantity (must be at least 1) and price (can't be empty, but can be zero). It's recommended you supply a date, but this isn't required. If no grades are selected, the history record will be tied to the coin variety only without association to a specific grade.

Use the **Grade Select** button to select grades from the pre-defined grade group lists. Click on **No Grades** to uncheck all grades in the checkbox list.

The 4 buttons at the bottom provide the choices on how to update the history, similar to the options provided for the PWL/PSL rapid entry dialog.

Add to History	Add the grades selected to the existing history. If no grades are selected, the coin variety will be added to the history if not already present.
Replace Grades	Remove any grades from the existing history on the coin record which are NOT selected in the checkbox list and add any grades which ARE in the checkbox list. If the coin record is not currently in the history, it will be added.
Remove Grades	Remove only selected grades in the checkbox list without removing other grades currently in the history. This option will NOT remove the coin record from the history unless all grades

	have been removed from the history for the coin.
Remove History	Remove the coin record from the history and any grades which may be present for this record (complete removal).

Help Menu

Topic Help (F1)

This option provides context-sensitive help for the report viewer.

Preferences (F2)

This option provides access to the EzCoin general preferences window.

View Report Title (Ctrl + T)

The title bar of the report viewer will attempt to show all of the input conditions which were used to generate the data for the report. For complex searches with many input conditions, the information will not fit the title bar. You can use this option to show a popup window with all of the search input values listed.

Other Report Viewer Features

Right click on the data grid for a popup menu with many of the choices from the primary viewer menu.

If you add images to a field list for a custom profile, you can click the image cell to highlight it, then hold down SHIFT and click again to popup an image preview window.

If you hold down SHIFT while clicking in a selected comments field cell, it will bring up the comments viewer/editor window.

Double click any cell in a coin record to show the associated record in the main EzCoin window.

Report Editor and Custom Profiles

Reports and Profiles Overview

Searches and reports in EzCoin rely on a profile of settings which contain the basic information for a report to be displayed and/or sent to the printer:

Style	The presentation style for a report, such as fit-to-page or multi-page print formats.
Filters	Settings which alter how data is presented in both the report viewer data grid and on the printed page.
Fields	The set of columns which make up the report. Fields can be single values, value pairs, or groups of related subfields.
Ordering	The primary sort order for the report and secondary sort order for field data groups.
Printer Settings	A set of basic printing attributes (paper size, orientation, margins, etc.).
Titles & Subtitles	The header and footer areas of each printed page contain margins, into which the titles and subtitles will be printed. There are up to 6 title areas and 6 subtitle areas for a given report.
Print Attributes	Options which specifically affect the printed pages only and have no effect on displayed coin records in the report viewer.
Fonts & Colors	Every area of a printed page (headers, footers, grid headers, total lines and data cells) have an associated font and text color which you can change.
Background Colors	For cells contained within the data grids which are printed, special background colors can be added for easier readability.

All of this information is self-contained into a single file called a Report Profile, which has an extension of .RPT and can be found in the EzCoin installation path under the Profiles folder. Profiles have automatic backup capabilities to allow for one level of Undo if you are not happy with your customizations and wish to change back to the previous settings.

Profiles are also divided among the primary files for general searches and reports, plus a small set for Grand Totals reports. Although they share a common RPT file extension and use the same editor to make changes to the profile settings, they are not compatible with each other, and as such are stored in separate folders within EzCoin.

Profiles are further divided into Pre-Supplied and Custom file types. There are a few key differences between them, and they are separated into their own folders to avoid mixing your custom profiles with ones supplied by SoftPro.

- Supplied profiles can't have their field lists modified – you will not be able to add, remove, or reorder the fields for these profiles. If you need to alter a field list for a supplied profile, you will need to make a copy and save it as a custom profile.
- Supplied profiles are defined for each search and report menu item within the main EzCoin **Search** and **Reports** menus. Many of these profiles are specifically prefixed with the text of "Default" to denote a pre-supplied stock profile. You will not be able to rename the RPT files or the description text.
- The backup copies of supplied profiles are read only, and can't be modified. This is to ensure that if you have any issues with a supplied profile, you can easily restore from the pre-supplied backup copy.
- Supplied profiles are segregated from custom profiles in the editor, using a pair of drop down lists.
- Custom profiles are the only ones allowed for profile switching in any search or report window where a profile swap is allowed. A pre-supplied profile can only be used for the corresponding search/report menu item where it has specifically been assigned to work from.
- Custom profiles can have fields assigned to them which only exist for a specific country file (i.e. you have created a custom field and assigned it to the field list of a custom report). For these types of profiles, they will not be useable if they are attached to any search or report for another country file which doesn't have that field defined – an error will be displayed when you attempt to run the report stating that the field can't be found in the country file.

Using the Report Editor

There are 3 menu options under Reports for running the editor. The Grand Totals Profile editor is available all the time and is divided into profiles for horizontal and vertical data layouts.

The standard Report Profile Editor is only available when a country file is open. This is due to the fact that field lists requires an active country file to be able to access any custom fields attached to the profile.

The editor window is organized exactly as described in the overview section, broken into several tabs.

Report Profile Editor - Enhanced Inventory Report (EnhancedInventory.rpt)

General Setup | Fields | Printer Setup | Titles & Subtitles | Print Attributes | Fonts & Text Colors | Background Colors

Supplied Profile: <No Supplied Profile Selected>

Custom Profile: Enhanced Inventory Report

Report Style: Multiple Pages Wide

Columns to Repeat on Each Page: 0

Header Text Rotation: None

Grid Justification: Centered

Rotation Alignment: Top Down

Data group repeat: Repeat Denomination + Year

☐ Show comments across the entire page width

☐ Use long format for report header field names

☐ Hide "No" value in Yes/No Fields

☒ Suppress zero values in reports

Text for "Yes": Yes

Text for "No": No

Quantity + Value Format: 999 999,999.99

Quantity Only Format: 999

Value Only Format: 999,999.99

Save As... | Restore... | Delete | Reset | Copy... | Rename | Save | Exit

Before working with a report profile, you will need to choose one from either the Supplied Profile or Custom Profile drop down lists. If you don't choose a profile in either list, you will be editing an undefined blank template filled with default profile settings. If you attempt to save such a profile, you will be asked to provide a name and description for it before the save can occur.

Report Editor Attributes

Each tab in the editor will be shown with an associate summary table below it to describe the various options assigned to the tab. The title bar of the editor will always show the file name and description for the current profile selected.

General Setup

Report Profile Editor - Enhanced Inventory Report (EnhancedInventory.rpt)

General Setup | Fields | Printer Setup | Titles & Subtitles | Print Attributes | Fonts & Text Colors | Background Colors

Supplied Profile: <No Supplied Profile Selected>

Custom Profile: Enhanced Inventory Report

Report Style: Multiple Pages Wide

Columns to Repeat on Each Page: 0

Header Text Rotation: None

Grid Justification: Centered

Rotation Alignment: Top Down

Data group repeat: Repeat Denomination + Year

☐ Show comments across the entire page width

☐ Use long format for report header field names

☐ Hide "No" value in Yes/No Fields

☒ Suppress zero values in reports

Text for "Yes": Yes

Text for "No": No

Quantity + Value Format: 999 999,999.99

Quantity Only Format: 999

Value Only Format: 999,999.99

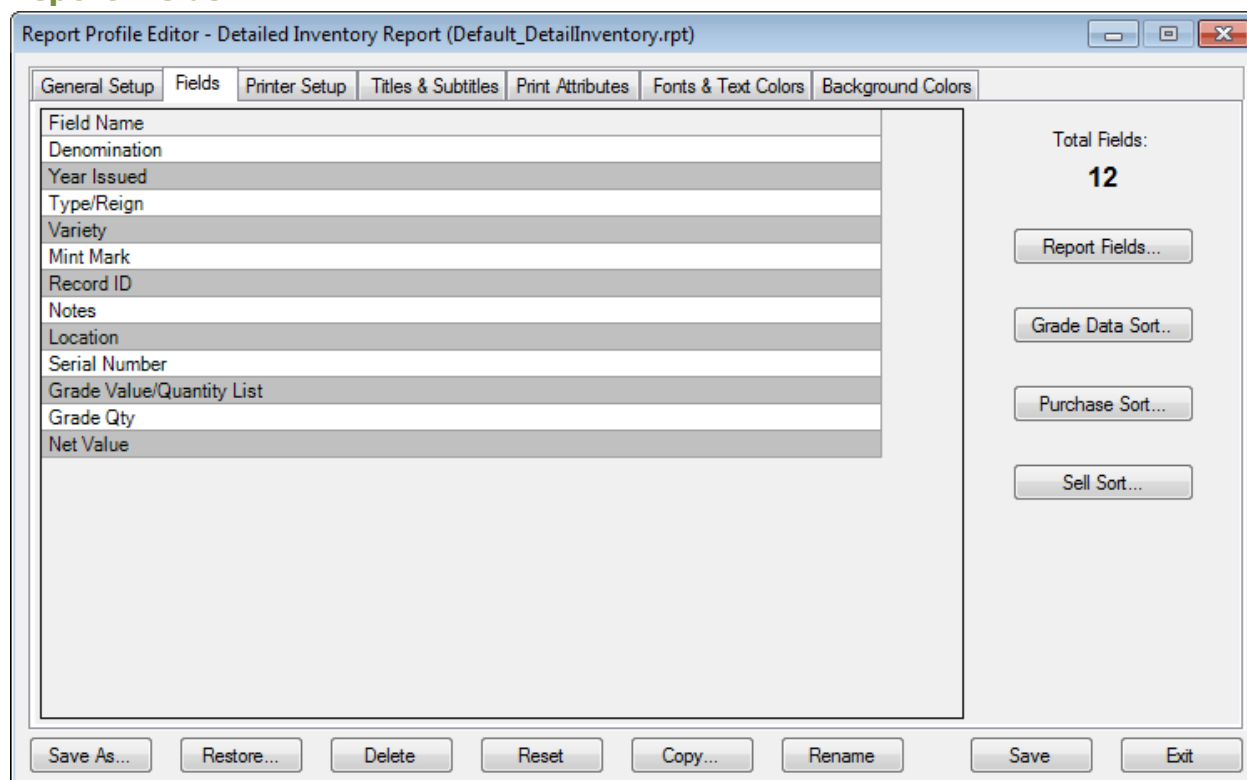
Save As... | Restore... | Delete | Reset | Copy... | Rename | Save | Exit

Supplied Profile	This list will contain all of the pre-supplied report profiles which are assigned to the items under the Search and Reports menus.	
Custom Profile	This list will contain all custom report profiles, which you have created and which may also be supplied by SoftPro.	
Report Style	There are 4 choices for the report style:	
	Screen Only	The report can only be used for the report viewer window. This option should only be chosen to create ad-hoc custom profiles which don't require all of the printer settings to be configured, as the report can't be sent to the printer. When you choose this type, all tabs except the first 2 in the editor window will disappear.
	Fit to Page	This type of report will attempt to fill the page width with all of the fields in the field list. If the fields will not fit onto the width of a single page of paper, you will not be able to print the report.
	Multi Page	This is the default type for pre-supplied profiles which ensures that the report can be printed by spanning the fields across multiple pages.

	Staggered	The staggered report is useful for creating condensed reports which make maximum use of the available area on each printed page. This is useful for saving paper for very large reports. The fields in the coin record are staggered left to right then top down within a single page width, creating a row-column block of cells per coin record.
Column Repeats	The leftmost fields in the field list can be replicated onto each page which spans all the pages of a multi-page format report. The default value of zero means no fields will replicate across pages (unless Denomination/year field repetition is used, see below). If you put a value of 3 in this setting for example, then the first 3 fields in the field list will appear on each page which spans the width of the report.	
Header Rotation	For reports with fields which contain many narrow fields (such as grade price or quantity details), the header labels can be significantly wider than the data values in the grid. This can result in wasted paper and the chance that a report defined as fit-to-page won't fit the paper width. Header rotation can print the label text at 90 degree angles to the page orientation, allowing for a more condensed report, at the expense of some vertical paper space to contain the header area of the grid.	
Justification	The data grid can be justified to align to the left margin, center within the margins, or fill the paper width. For the last option, the grid cells will proportionally be resized to ensure that the grid will have its edges flush with the left and right margins.	
Rotation Alignment	When using 90 or 270 degree header rotation, you can choose if the vertical alignment of the text is flush with the top or bottom of the cell containing the header label.	
Data Group Repeat	The three choices here determine how the field list is replicated across the pages of a multi-page report. If the Denomination/Year choice is used, then these fields appear on each page, even if the column repeat option is set to 0. For the Repeat on Regular fields option, the column repeat value defines how many of the leftmost fields in the field list will appear on each page. This value is not applicable for staggered or fit-to-page reports.	
Comments Span Page Width	The comments field can contain up to 4,000 characters of data. As such, how this field is presented in a report can determine how many pages of paper are needed to print it. By using the spanning option, the comments will appear below all other fields in the grid, as a single cell of data, exactly the width of the page, and as tall as	

	<p>needed to show all the text.</p> <p>You should NOT enable this option for any report profile which has the comments field in the field list, or you will be showing the same information twice.</p>
Yes/No Text Values	<p>EzCoin is currently provided as an English-only distribution. However, all of the text which appears on the printed report can be customized by editing the Master Fields configuration to suit any language. Since there are fields defined in the this list which are classified as Yes/No data types, you can choose to use other text values in place of the default "Yes" and "No" strings.</p>
Header Long Name Format	<p>Check this option to print header labels using the long format text. If you want to conserve paper, use the short formats of the labels. Both the long and short names can be customized in the Master Fields configuration.</p>
Hiding "No" Values	<p>Check this option to suppress the "No" text for Yes/No field types on the report.</p>
Suppress Zero Values	<p>Check this option to suppress currency and quantity fields on the report if they have no value assigned to them (i.e. \$0.00 and 0).</p>
Quantity & Value Masks	<p>For fields containing quantity and price values, you can set a default "mask", which is simply an arbitrary string of characters which are used to set the column width on the report. Despite the fact that the default values are sets of "9"s, you can use letters, digits or punctuation in any combination.</p>

Report Fields

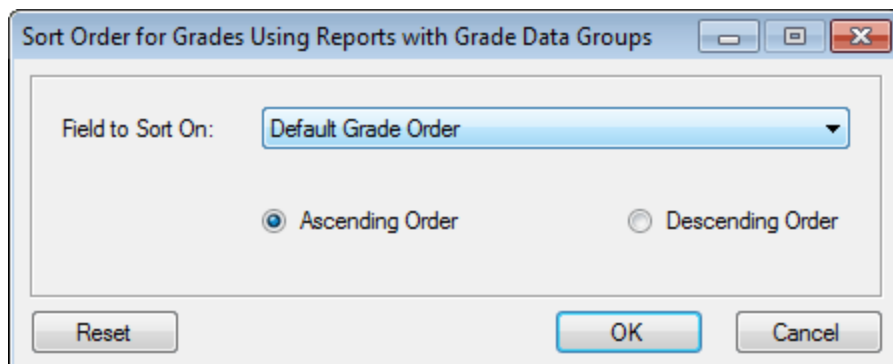


This tab doesn't really provide field editing capabilities, but rather a summary of what fields are assigned to the report. To edit the field list, click on the Report Fields button to run the field profile editor. The Total Fields label indicates primary field totals only. Any primary field which is based on a data group with subfields can in turn contain many additional report fields.

Data Group Sort Order

Any profile where you have assigned one of the 3 types of data groups (fields which contain multiple subfields) for Grades, Purchase History, or Sell History can be assigned a secondary sort order, independent of the primary field sort order for the report. Note that PWL/PSL data groups have a preset sort order which can't be changed.

Clicking any of the 3 "Sort" buttons will bring up the sort options window as shown below.



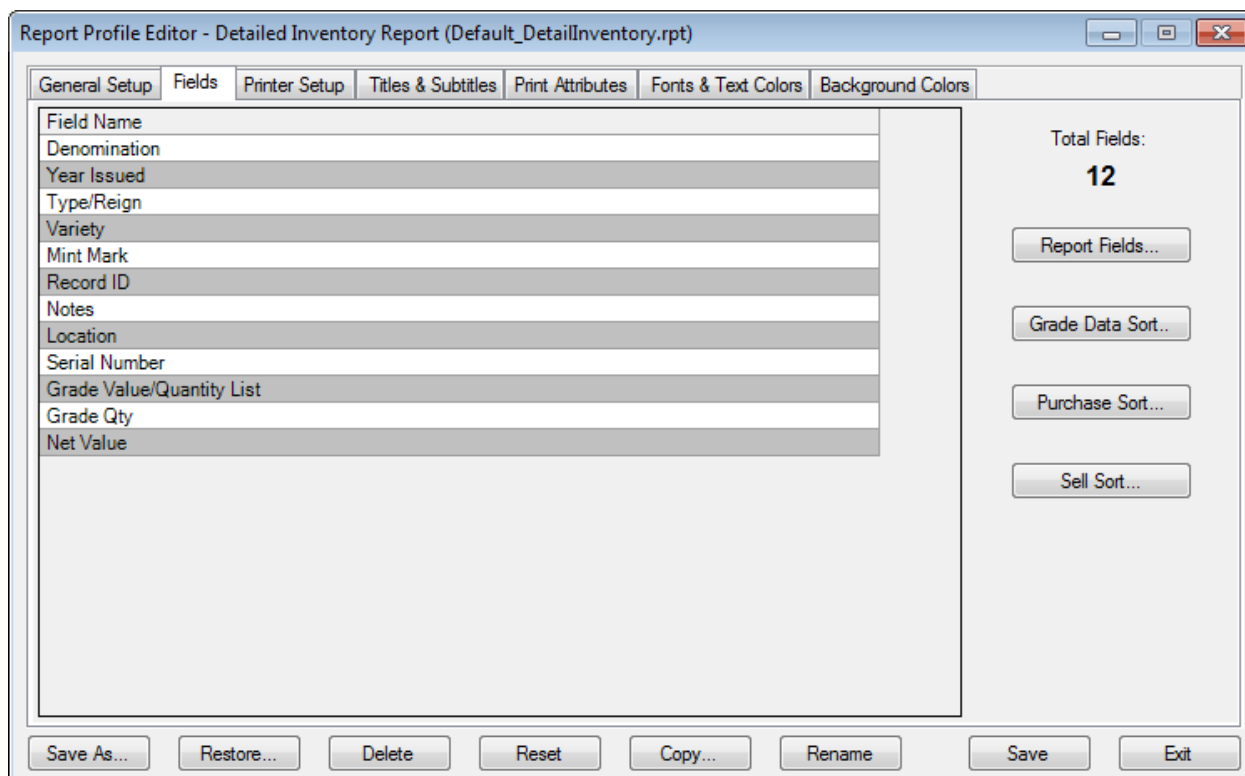
The drop down list will contain the field which will act as the secondary sort for all the rows of data within the report.

The sort will be applied even if the field itself is not part of the report profile.

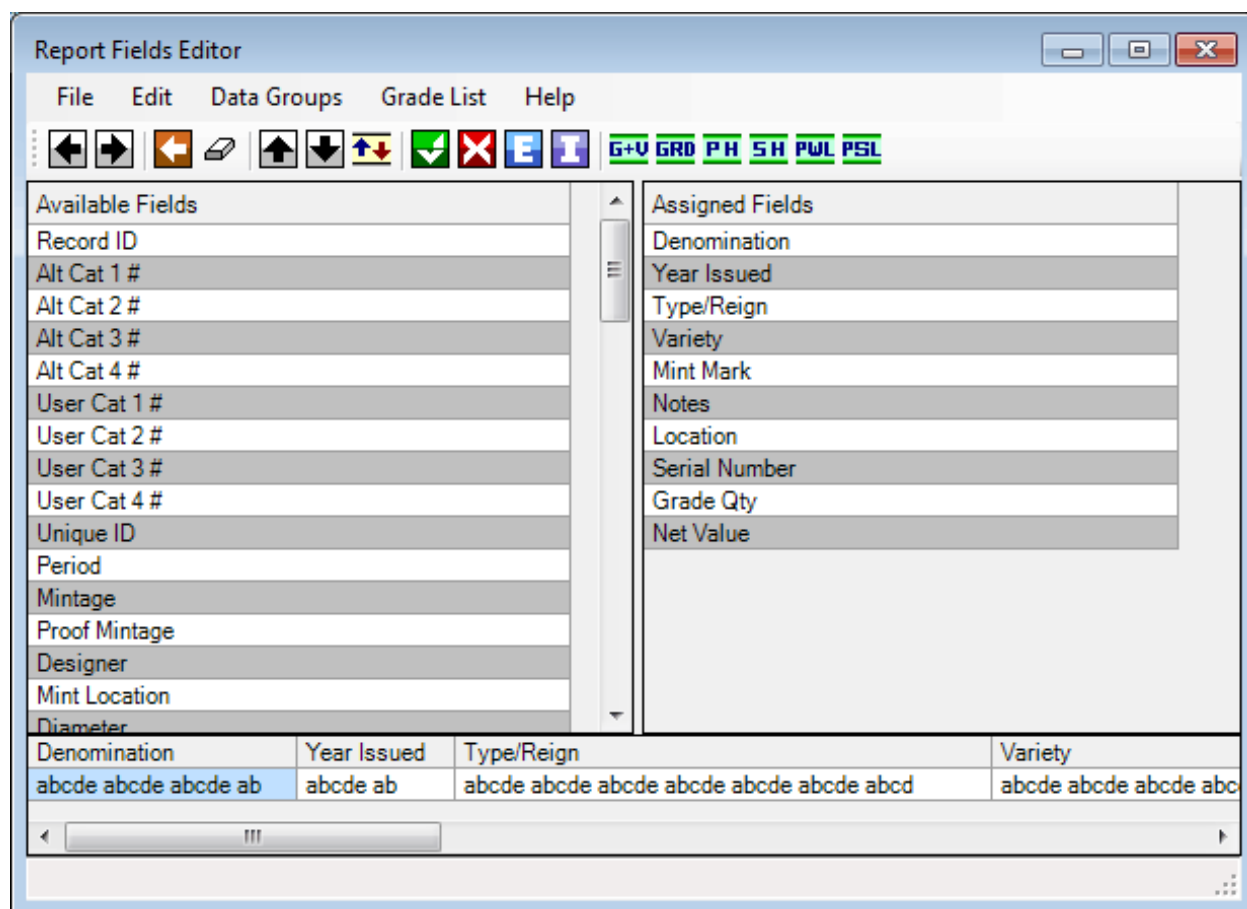
Click on the **Reset** button to apply the default sort order for the data group.

Field Profile Editor

The field profile editor is available from the EzCoin Report Profile editor utility. You will find it on the **Fields** tab in the editor window.



Click the **Report Fields** button to run the field profile editor.



The editor window is organized into the following sections:

- A menu bar across the top contains all editor options.
- The toolbar contains short cut icons for frequently used editing options.
- The left side list contains the available report fields which can be assigned to the profile.
- The right side list contains the current fields assigned to the report. As you add more fields, the left side list will shrink and the right side list will grow.
- The small scrolling grid at the bottom is the current field list preview pane. It provides a visual cue of the complete set of primary and subfields which will be part of the report.
- The status bar at the bottom is used to display help hint messages.

Toolbar Options



1	Use the left arrow to remove fields from the report (move from the right list to the left). NOTE: As a shortcut, you can simply right click the selected fields in either list to move them to the opposite list. You can also double-click individual fields to assign or remove them.
2	Use the right arrow to assign fields to the report (move from the left list to the right).
3	Undo all field edit changes since you started the editor.
4	Erase all fields in the report. You will not be able to remove the Denomination or Year issued.
5	The up arrow moves selected fields in the assigned (right) list upwards. Hold down the Ctrl key while clicking to shift all selected fields to the top of the list. The top-down ordering of fields in the editor is the actual left-to-right ordering on displayed and printed reports.
6	The down arrow moves selected fields in the assign list down one position.
7	Click this button to change the primary report sort order.
8	This button saves all changes to the field list. This does NOT save the report profile changes (The field list is only one part of the overall profile). You must click Save from the report editor window to save changes to the report file.
9	Click this button to cancel all changes made to the field list.
A	Export the field list to a file which can be recalled at any time.
B	Use this button to import a field list which was exported.
C	Access the grade values and quantities configuration for any report profile which uses the Grades/Values Quantity List field item.
D	Access the field configuration for the grades data group. Items D to H use the vertical format of data presentation in reports, where each grade in the associated data type is shown as one row in the report.
E	Access the field configuration for the purchase history data group.
F	Access the field configuration for the sell history data group.
G	Access the field configuration for the priority want list.
H	Access the field configuration for the priority sell list.

Exporting and Importing Field Lists

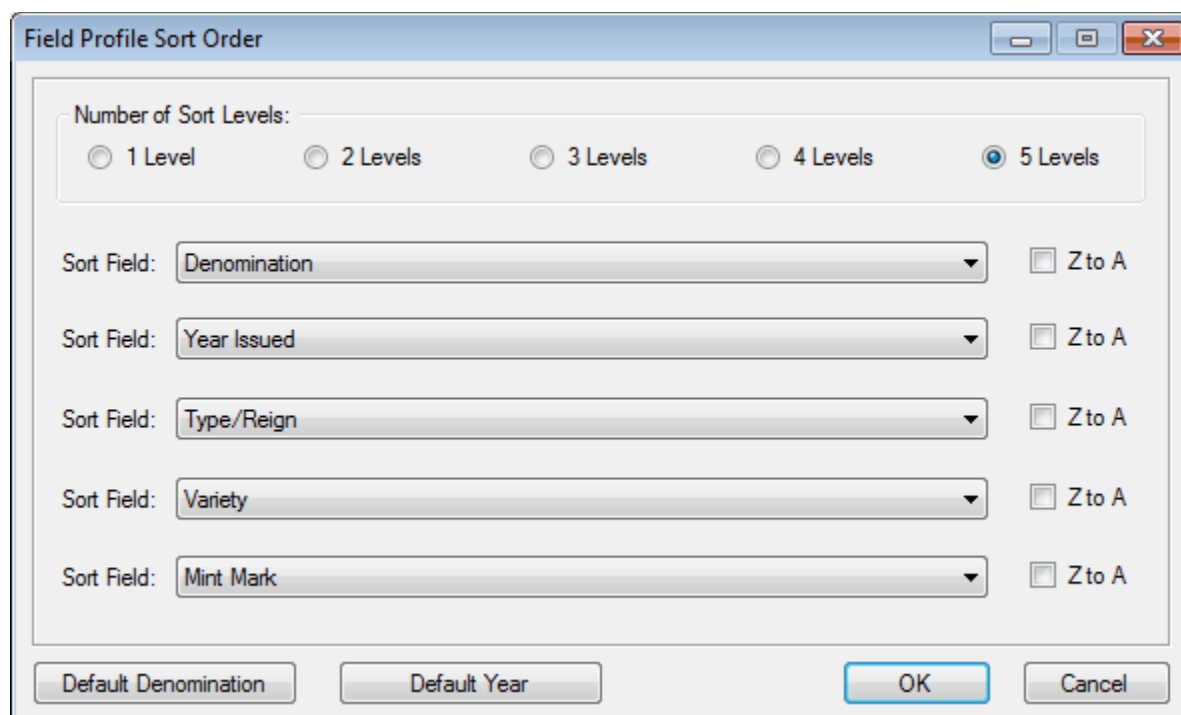
Use the export option to save the field list configuration to a file. The files are saved with an extension of **.RFST**. You can import a field list into another report profile, provided that any custom fields in the list are also present in the current country file. The editor will also reject an import file if it references a custom grade definition not defined in the current country.

Setting the Field Preview Format

Use the Field Preview option (Ctrl + N) in the Edit menu to change the way the preview pane at the bottom displays the field configuration. Short names will substitute the shorter labels for the fields and swap the field sample text with field position numbers.

Setting a Primary Sort Order

Choose this option from the Edit menu to bring up the field sort dialog window.

The image shows a Windows-style dialog box titled "Field Profile Sort Order". At the top, there's a section for "Number of Sort Levels:" with five radio button options: "1 Level", "2 Levels", "3 Levels", "4 Levels", and "5 Levels". The "5 Levels" option is selected. Below this, there are five rows, each representing a sort level. Each row has a "Sort Field:" label followed by a dropdown menu and a checkbox labeled "Z to A". The dropdown menus are currently set to "Denomination", "Year Issued", "Type/Reign", "Variety", and "Mint Mark" respectively. All "Z to A" checkboxes are unchecked. At the bottom of the dialog, there are four buttons: "Default Denomination", "Default Year", "OK", and "Cancel". The "OK" button is highlighted with a blue border.

You can sort the report data using up to 5 fields, each of which can be in ascending (A to Z) or descending (Z to A) order. Check option for Z to A on each field to reverse the sort order.

The sort field is limited to a specific set of primary coin attributes and can be extended to use custom fields which you can attach to the coin record. You can't

choose attributes which are considered secondary data within EzCoin (Priority Want and Sell Lists, purchase/sell history, and inventoried grades).

The 2 default buttons are used to set a standard sort order based on the 5 primary coin fields.

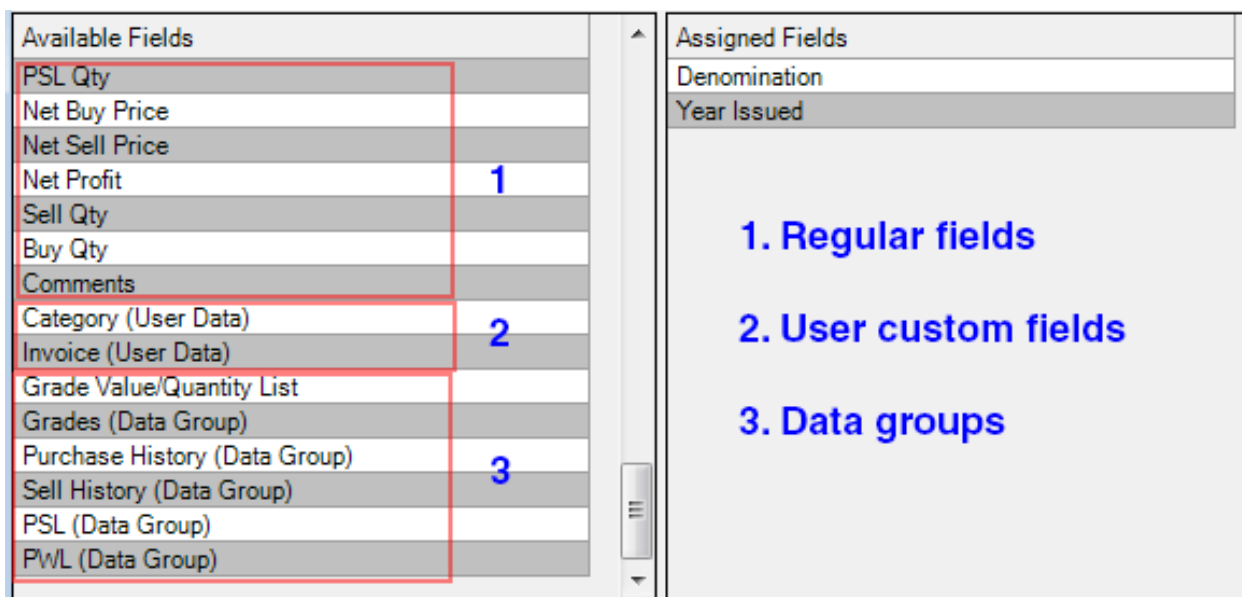
Field Data Groups

There are 6 data groups which can be assigned to a report profile field list. You can assign one or more of these groups to the report, after which you should configure how the subfields are organized for the group.

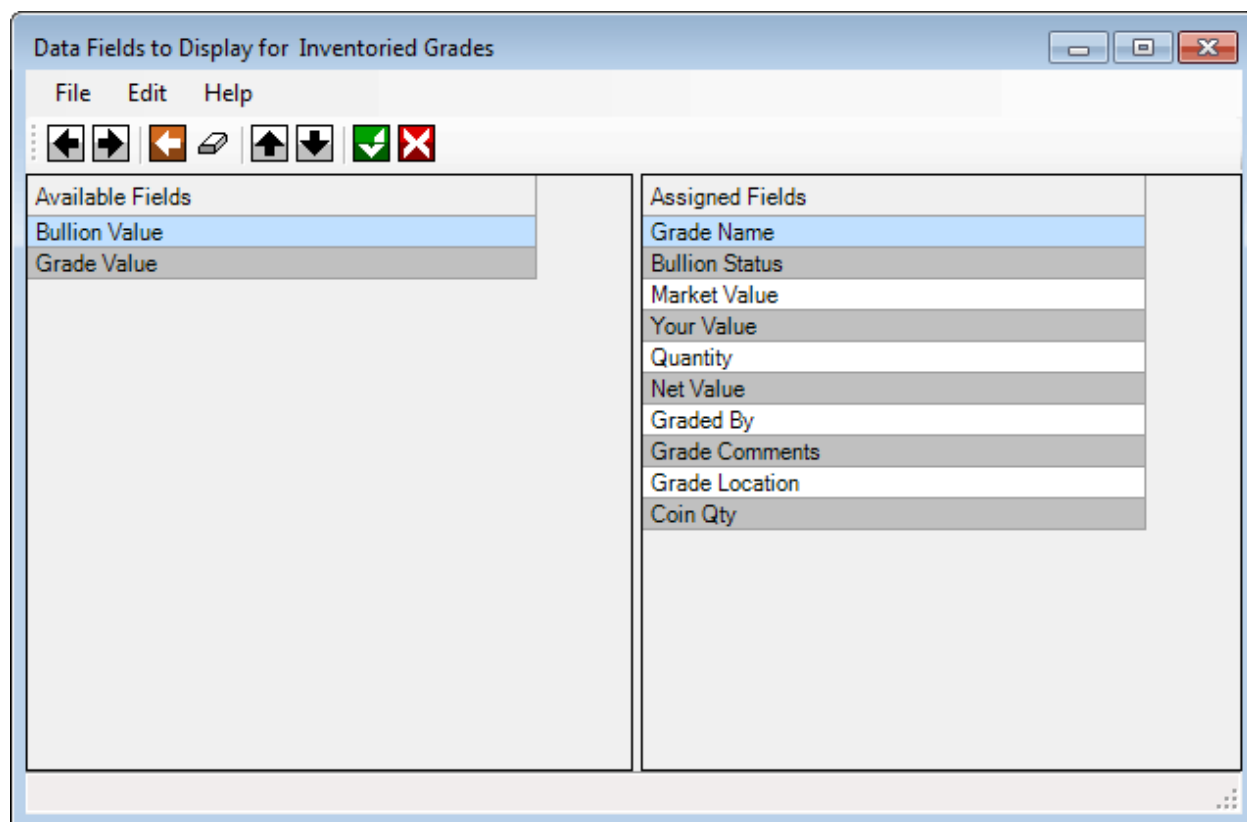
Five of these groups are defined under the Data Groups menu. These groups always show their data vertically in the report:

- Grades
- PWL Data
- PSL Data
- Purchase History
- Sell History

You will find the data group fields at the very bottom of the available field list, below any custom fields which will appear below the regular coin fields.



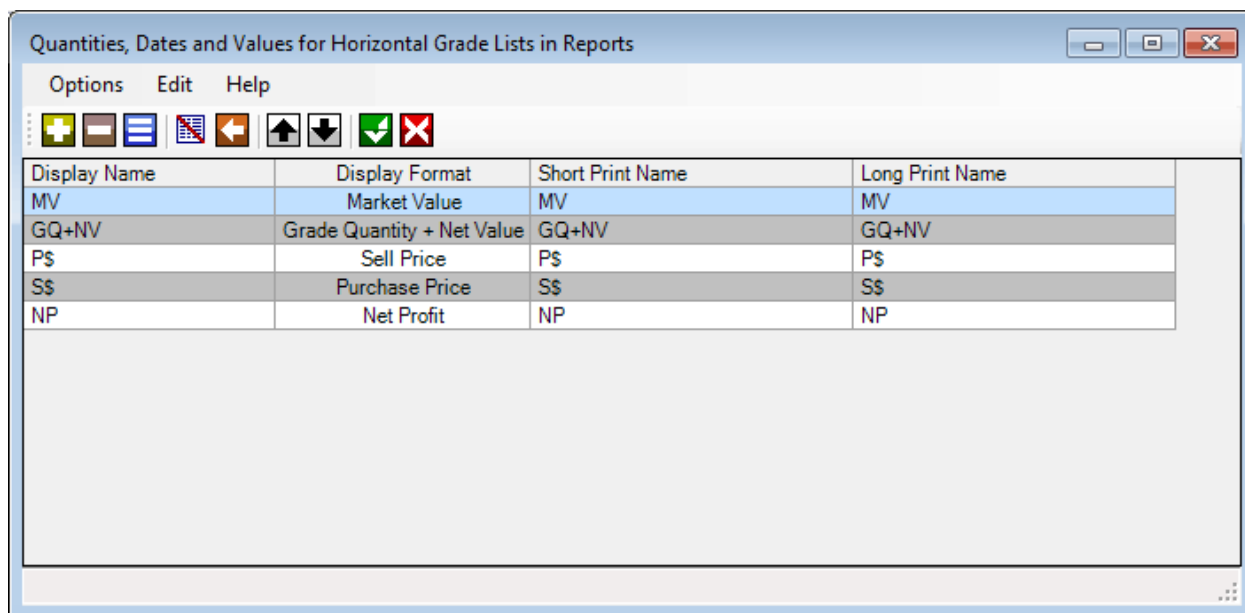
Once you assign any of the fields with the (Data Group) tag to the right side list, you can access the data group editor by choosing the menu option or clicking on the appropriate button in the toolbar.



The data group editor looks similar to the field profile editor. The 2 lists represent subfields which belong to the group. The left side list contains the available subfields, and the right side list contains the assigned fields. The menu and icon options are identical in behavior to the ones in the field list editor.

Grade Values/Quantities (Horizontal Format Data Group)

The 6th data group is slightly different than the other 5, as this one is specifically designed for horizontal presentation of grade information using combinations of quantity and currency values.

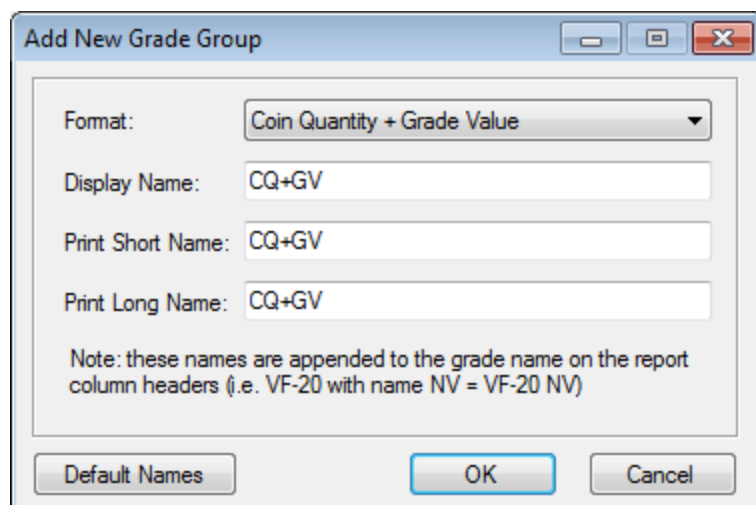


This editor involves creation of custom subfields based on combinations of quantity and currency values assigned to each subfield. The editing of grade subfields for this type of data group is perhaps the most complex option in EzCoin to work with, yet it is also the reason why the report profiles can appear completely different from each other by using just a single data group field in the profile.

- The + and – buttons are used to add and remove subfields from the list. The editor button is used to change the subfield configuration after it's already been added to the list.
- The clear button will erase all subfields in the group.
- The undo button reverses all changes made since you started editing the group.
- The up and down arrows move selected subfields up and down within the list.
- The save button will commit all subfield changes for the group to the profile. These changes will not be saved until you commit the field profile configuration and then save the profile from the main profile edit window.
- The cancel button will discard all changes you made and close the editor.

The list itself shows the display name for on-screen labels and the report viewer, the short and long names for header labels on printed reports, the display format for the data and the grades which are used to build the net sum for quantity and currency values. These names can be changed to fit any description you like.

When adding a new subfield to the configuration, you will see the following dialog window.



Format: Coin Quantity + Grade Value

Display Name: CQ+GV

Print Short Name: CQ+GV

Print Long Name: CQ+GV

Note: these names are appended to the grade name on the report column headers (i.e. VF-20 with name NV = VF-20 NV)

Default Names OK Cancel

Each subfield is referred to as a Grade Group. It can consist of any of the combinations of currency and quantity shown below.

- Grade Quantity + Grade Value
- Grade Quantity + Net Value
- Coin Quantity + Grade Value (useful for reports on set items)
- Coin Quantity + Net Value (useful for reports on set items)
- Grade quantity
- Coin quantity (same as grade quantity if not a Set with multiple physical coins)
- Grade value (will be based on market value, user value and bullion value)
- Net value (quantity * grade value)
- Market value (if available)
- Bullion value (if applicable)
- Purchased coin quantity (from purchase history)
- Sold coin quantity (from sell history)
- Purchase price (from purchase history)
- Sell price (from sell history)
- Net Profit (based on purchase + sell history)

This information is summarized in more detail in a table at the end of this topic.

Note that grade value is based on the following rules:

- If the coin was added as a bullion value, it will be the bullion price.
- If the coin was added as non-bullion (normal inventory mode), then the user value will take precedence over the market value. If no user value is present, market value is used to determine the grade value.

Single Subfield Configuration

If you only add one subfield (aka Grade Group), then the labels will not be used on the report headers. Instead only the grade names (i.e. MS-65, VG-8, etc.) will appear on the report header. When multiple subfields are in use, then labels are needed to distinguish the type of data in each column.

Each grade defined for the current country which has a value (quantity or price) will be assigned to one column on the report. For the special split fields (i.e. Quantity + Net Value), the quantity will always be left justified and the price right justified in the report column.

In the example shown above, assuming there is valid data for MS-65 and VG-8 for a coin record, the columns in the report (left to right) would be shown as:

1	Market value for MS-65
2	Grade quantity + net value for MS-65
3	Sell price for MS-65
4	Purchase price for MS-65
5	Net profit for MS-65
6	Market value for VG-8
7	Grade quantity + net value for VG-8
8	Sell price for VG-8
9	Purchase price for VG-8
10	Net profit for VG-8

Note that reports in EzCoin auto-suppress columns for which there is no data. For example, if there is no purchase price for any coin on the report, then column #9 in the above example will never appear. This auto-suppression keeps the report as condensed as possible by removing wasted blank space for columns which are empty.

Grade Group Format Types

The following formats are available to display on reports using the horizontal grade quantity/value group.

Grade Quantity + Grade Value	The grade quantity will appear together with the grade value (user custom value, bullion value or market value) in one cell, with the quantity on the left and the currency value on the right.
Grade Quantity + Net Value	The grade quantity will appear together with the net value in one cell.
Coin Quantity + Grade Value	The coin quantity (grade quantity * set coin quantity) will appear with the grade value in one cell. For non-set coins, the grade and coin quantity values will be identical.
Coin Quantity + Net Value	The coin quantity will appear with the net value in one cell.
Grade Quantity	The grade quantity will appear in the cell.
Coin Quantity	The grade quantity * set coin quantity will appear in the cell.
Grade Value	The grade value (bullion value, user custom value if provided, or market value) will appear in the cell.
Net Value	The grade value * quantity will appear in the cell.
Purchase Price	The purchase price will appear in the cell.
Sell Price	The sell price will appear in the cell.
Net Profit	The net profit (sell price – purchase price) will appear in the cell. If there is no sell price, then the net profit will be zero.
Market Value	Pre-supplied or user-supplied market value for the grade.
Bullion Value	If the coin has a precious metal content and a valid weight, then the bullion value will be based on the current precious metal prices assigned to the country file.

Printer Setup

Report Profile Editor - Enhanced Inventory Report (EnhancedInventory.rpt)

General Setup | Fields | **Printer Setup** | Titles & Subtitles | Print Attributes | Fonts & Text Colors | Background Colors

Printer:

Paper Size:

Page Orientation:
☐ Portrait
☒ Landscape
☐ Default

Top Margin:

Left Margin:

Right Margin:

Bottom Margin:

All values are in inches

Save As... | Restore... | Delete | Reset | Copy... | Rename | Save | Exit

The printer setup tab allows you to set specific printer settings for this profile. Much like the EzCoin General Preferences printer settings, the default report profile settings are based on the following:

- Your default Windows printer.
- Default paper size.
- Left and right margins of ½ inch.
- Top and bottom margins of 1 inch.
- Landscape orientation.

You can change these settings and they will be applied to the current report profile only.

Note: If you don't see any printers in the drop down list, use the Refresh Printers option in either the main EzCoin menu or from the general preferences window. EzCoin creates a printer list when the application is first initialized. If you add or remove printers after EzCoin has been installed, you will need to refresh your printer list.

Titles and Subtitles

Report Profile Editor - Enhanced Inventory Report (EnhancedInventory.rpt)

General Setup | Fields | Printer Setup | **Titles & Subtitles** | Print Attributes | Fonts & Text Colors | Background Colors

Title Top Left Country Name	Title Top Middle Report Title	Title Top Right Date and Time
Sub Title Top Left Nothing	Sub Title Top Middle Report Parameters	Sub Title Top Right Nothing
Title Bottom Left EzCoin Signature	Title Bottom Middle Country Description	Title Bottom Right Page Numbers
Sub Title Bottom Left Nothing	Sub Title Bottom Middle Nothing	Sub Title Bottom Right Nothing

Title/Sub Title Information:

Date Format: Default Short Format

Time Format: 01:30 PM

Page Numbers: Page: # of #

Dates (Data): Default Short Format

Report Title: EzCoin Detailed Inventory Report

Report Subtitle:

User Text 1:

User Text 2:

User Text 3:

User Text 4:

Save As... | Restore... | Delete | Reset | Copy... | Rename | Save | Exit

A report has 6 title areas and 6 subtitle areas as follows:

Left Margin	Top Margin			Right Margin
	Title 1	Title 2	Title 3	
	Subtitle 1	Subtitle 2	Subtitle 3	
	Data Grid			
	Title 4	Title 5	Title 6	
	Subtitle 4	Subtitle 5	Subtitle 6	
	Bottom Margin			

The titles and subtitles are printed within the top and bottom margin areas of the page. If you decrease the size of these margins, you reduce the available space to print the text – always ensure there is sufficient space to print the titles and subtitles, unless you intend to create a report without any of the areas being used.

Each of the 12 areas is defined by choices made in the appropriate drop down lists. You can choose from one of several attributes to place into a title or subtitle area.

Nothing	No attribute will be printed in the title/subtitle area.
Report Title	The text which appears in the Report Title text box.
Report Sub Title	The text which appears in the Report Subtitle text box.
Date and Time	The date and time based on the date and time format chosen from the 2 drop down lists.
Page Numbers	Page numbers, using the format chosen from the drop down list.
Country Name	The name of the country identity, for example any country derived from USA will be the text "USA".
Country Description	The description as stored in the country file settings.
Country File Name	The file name as stored in the DB folder of the EzCoin application path.
User Defined 1	Any text of your choice, which is entered in the corresponding text box in the dialog window.
User Defined 2	
User Defined 3	
User Defined 4	
Report Parameters	EzCoin will attempt to output as much of the search input conditions as will fit without overwriting any other text in the report or running off the margin edges. This is the same text as appears in the title bar of the report viewer window, less the report title.
EzCoin Signature	For trial versions of EzCoin, a special copyright signature string is attached to the bottom left of all reports, and can't be removed. You are free to add or remove this message as long as you have a registered copy of EzCoin.

One last item on this tab is the date format for Data cells. Choose from this drop down list to enforce a specific format pattern on all dates in the report data grid.

Print Attributes

Report Profile Editor - Enhanced Inventory Report (EnhancedInventory.rpt)

General Setup | Fields | Printer Setup | Titles & Subtitles | **Print Attributes** | Fonts & Text Colors | Background Colors

☒ Data row coloring Row band gap: 0 Staggered Report Indent: 1

☒ Draw a line between the header text and the data grid Grid Line Type: Both

☒ Draw a line between the footer text and the data grid Grid Line Thickness: 1/4 Point

Header/Footer Margin Gap: 0.125 Header/Footer Line Thickness: 1/4 Point

Header/Footer Title Gap: 0.0625 Cell Horizontal Indent: 0.0625

Grid Page Offset X: 0 Cell Vertical Indent: 0.0625

Grid Page Offset Y: 0 Vertical Text Alignment: Middle

Image Width: 0.5 Image Height: 0.5

Image Print Quality: High Quality Bicubic

Maximum Pixel Size before Image Reduction: 600 Pixels

All values are in inches

Save As... Restore... Delete Reset Copy... Rename Save Exit

This tab contains several options which control how each page will be formatted on the report. With the exception of the value format setting, all other attributes are for the printed pages only.

Data Row Coloring	If this option is enabled, the odd and even rows of the data grid will alternate background colors, much like the on-screen report viewer's data grid.
Row Band Gap	This value, which is in inches, is the amount of white space to add between each row in the data grid. This gap value can be useful for staggered reports, as it will provide a clear division between the coin records.
Staggered Report Indent	When used the staggered report style, this indent is applied to rows 2+ for each coin record. For example, if a coin record requires 3 physical rows on the page to print all the fields, an indent of 1 inch would be applied to the second and third rows to clearly show the starting row for each coin record.
Header and Footer Lines	Check these options to draw a thin horizontal line across the page between the header/footer titles/subtitles and the data grid.

Grid Line Type	This option specifies the border style to use when drawing gridlines around the cells in the data grid.
Grid, Header & Footer Line Thickness	These drop down lists give you a choice of line thickness to use for the lines which separate titles, subtitles, and the data grid cells.
Header/Footer Gaps	These gaps provide a small amount of white space between text areas. The margin gaps are measure upwards from the top margin (header area) and downwards from the bottom margin (footer area). The title gap provides extra white space between titles and subtitles.
Cell Indents	The indent values provide a safe margin of white space within each cell of the data grid. The 2 values act as margins within each cell to keep the text from creeping into the grid lines which separate each cell's data from one another.
Grid Offsets	Grid offsets of 0 and 0 will align the grid to fit within the page margins. A negative value will force the grid to expand into the margin areas, while a positive value will make the grid shrink within the margin areas.
Vertical Alignment	This option specifies how the text should vertically align with each cell of the data grid.
Image Size	The image width and height values allow you to set the size of all image fields on the report. Image dimensions must fall between ¼ and 4 inches in either direction.
Image Quality	This option controls the print quality of images. Bicubic options provide the highest quality output.
Quantity & Value Format	This text box contains arbitrary text which defines the default number of measurement characters to use for grades and values appearing as part of an inventoried grade data group. EzCoin will measure the width of this string to set the default column widths in the report viewer. This option is not used for printed reports.
Pixel Size for Image Reduction	When printing images, EzCoin can reduce the size and increase the printing performance of the reports by scaling down the images before sending them to the print spooler. This setting controls the maximum width or height of an image before it is scaled down.

Fonts and Text Colors

Report Profile Editor - Enhanced Inventory Report (EnhancedInventory.rpt)

General Setup | Fields | Printer Setup | Titles & Subtitles | Print Attributes | **Fonts & Text Colors** | Background Colors

Header Rows Font: Arial 8 pt Bold ... ☒ Apply Font Scaling

Data Rows Font: Arial 8 pt ... Minimum point size for Font Scaling:: 4

Total Rows Font: Arial 8 pt Bold ... Point size scaling adjustment: 0.5

Title Top Left	Title Top Middle	Title Top Right
Arial 10 pt	Arial 10 pt	Arial 10 pt
Sub Title Top Left	Sub Title Top Middle	Sub Title Top Right
Arial 9 pt Bold	Arial 8 pt	Arial 9 pt Bold
Title Bottom Left	Title Bottom Middle	Title Bottom Right
Arial 10 pt	Arial 10 pt	Arial 10 pt
Sub Title Bottom Left	Sub Title Bottom Middle	Sub Title Bottom Right
Arial 9 pt Bold	Arial 9 pt Bold	Arial 9 pt Bold

Save As... Restore... Delete Reset Copy... Rename Save Exit

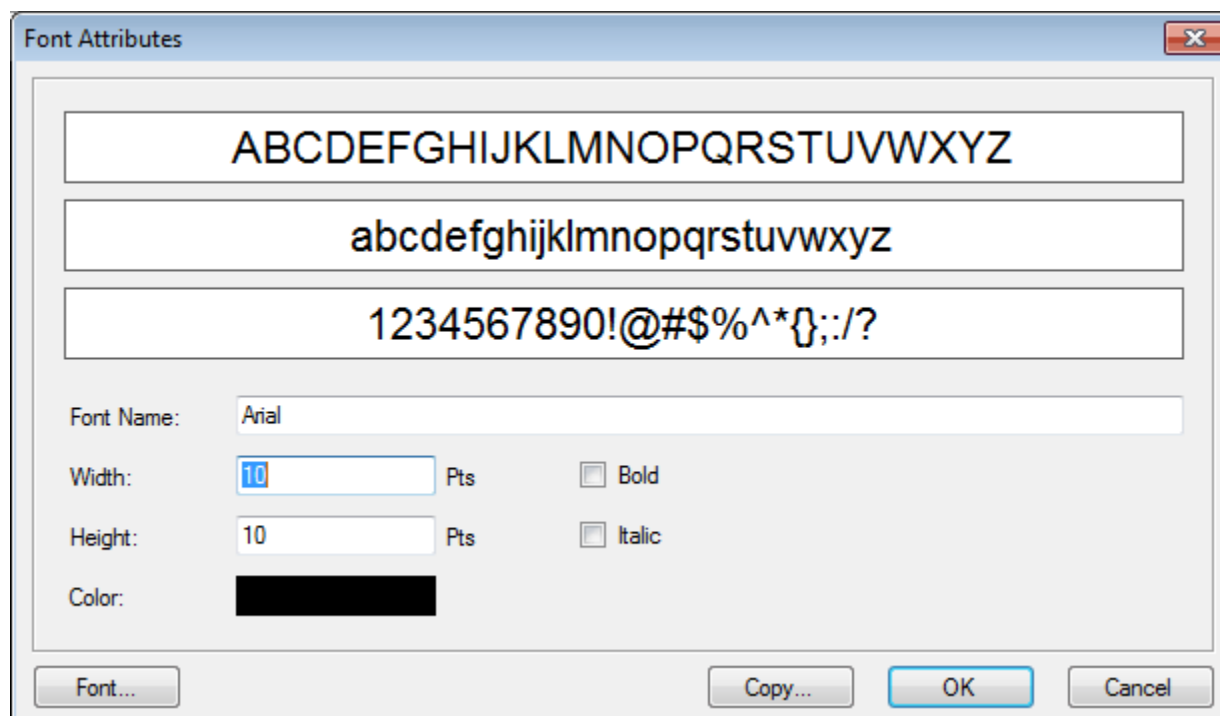
This tab contains all of the font settings for printed reports.

Header Rows Font	The top row of the data grid containing the header labels for each column on the report.
Data Rows Font	The interior data cells representing the coin information.
Total Rows Font	The bottom row(s) of the very last page of the report, for showing sum totals on columns which can be totaled.
Title and Subtitle Fonts	Each of the 6 titles and 6 subtitles can have unique font assignments.
Font Scaling	<p>The 3 attributes in the upper right corner define how font sizes can be dynamically reduced for the data grid text if the information doesn't fit within the cell. For multi-line or fixed width field types, scaling doesn't apply, as the text will either wrap to multiple lines, or the cell width will auto-size to fit the text.</p> <p>If font scaling is disabled, then text which doesn't fit a cell will be truncated and denoted with the ... ellipsis string.</p>

	When font scaling is applied, EzCoin will attempt to reduce the font size by the adjustment value down to the minimum allowable point size you specify until the text fits. If the text still doesn't fit, truncation will be used.
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Changing Fonts

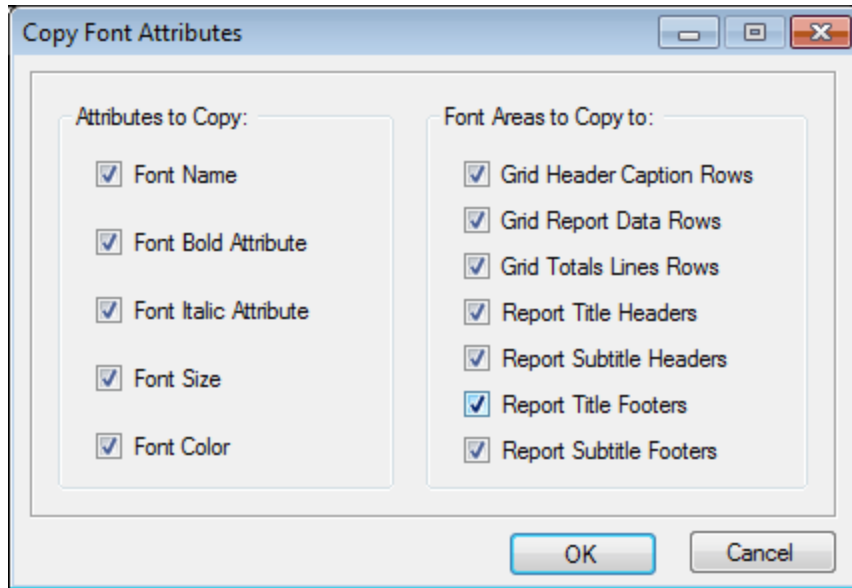
For each font in the window, you can click the ellipsis buttons to display the font picker dialog.



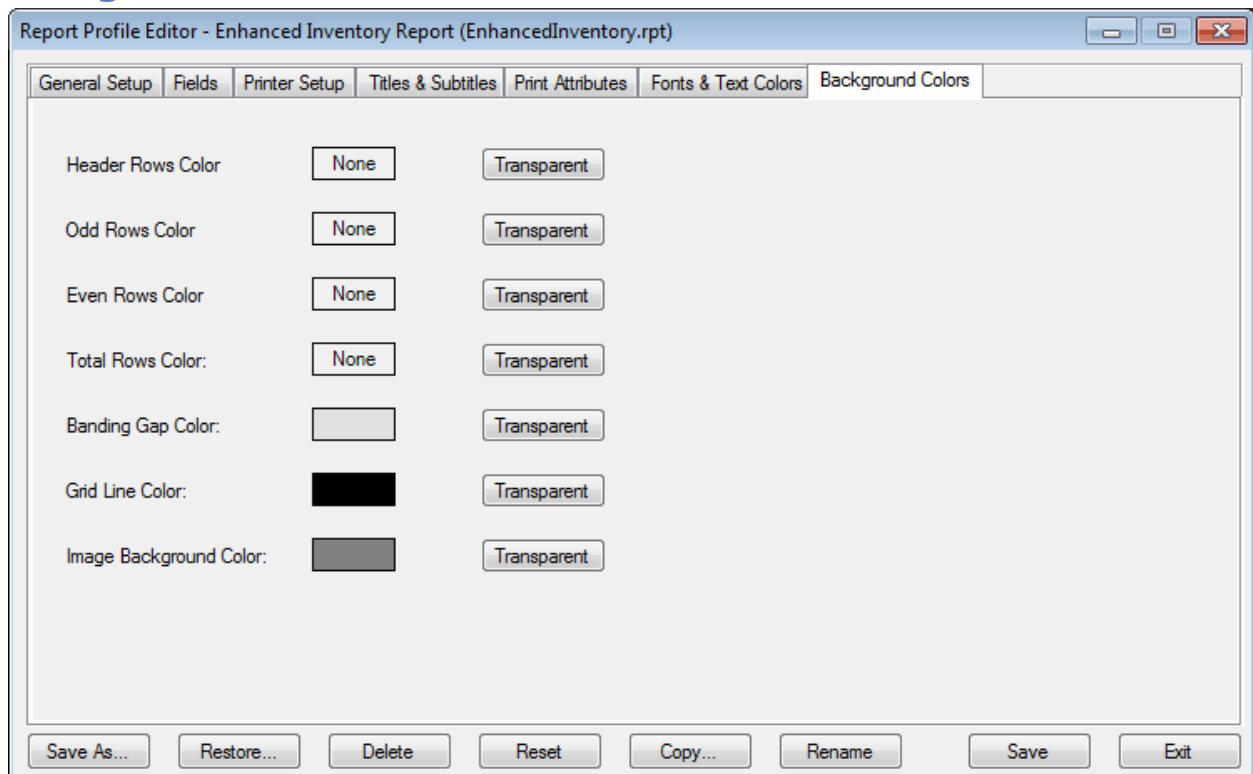
The easiest way to set a new font is to click on the **Font** button and use the standard Windows font selection dialog window. This will populate the font name, width, height, bold and italic attributes. The color can be changed by clicking on the color swatch in the above window.

The 3 labels at the top display character samples in the current font chosen.

The **Copy** button can be used to duplicate the current font settings to other report fonts without having to individually adjust each report font for the same values.



Background Colors



This tab contains the background colors for the printed reports. The Transparent buttons to the right of each color swatch are used to set a background color to transparent. This will be indicated with the text of "None" on the swatch.

Header Rows Color	Applied to the background of the top row of the data grid containing the column header labels.
Odd Rows Color	Applied to rows 1, 3, 5, etc. of the data grid cells.
Even Rows Color	Applied to rows 2, 4, 5, etc. of the data grid cells.
Totals Rows Colors	The bottom row(s) of the very last page of the report, for showing sum totals on columns which can be totaled.
Banding Gap Color	If you set a banding gap (the space between each row of coin records in the data grid), then this will be color of the spacing band.
Grid Line Color	The color for the grid lines surrounding the data cells, and also the color for the header and footer grid lines.
Image Background Color	When printing images, this color will fill up the empty space within the cell where the coin image itself isn't occupying.

Report Profile Edit Options

The **Save** button is used to save all changes from all the various editors within the report editing tool (fields editor, data group editors and all the attributes within the tabs of the main editor window). If you attempt to close the editor without saving changes, you will be given a warning and a chance to back out.

The **Save As** button will create a copy of the current profile under a new name and description of your choice. New reports are always saved as custom format – you can't save new reports as supplied format.

Click on **Delete** to remove the current report profile. You will not be able to delete supplied profiles. Once a profile is deleted, it can't be recovered except from a backup. If the report you deleted was assigned to any report or search in EzCoin, you will have to choose a different profile when you run that search or report.

The **Rename** button is used to change the description for a report profile. You will not be able to change the file name (save the report under a new name to do this).

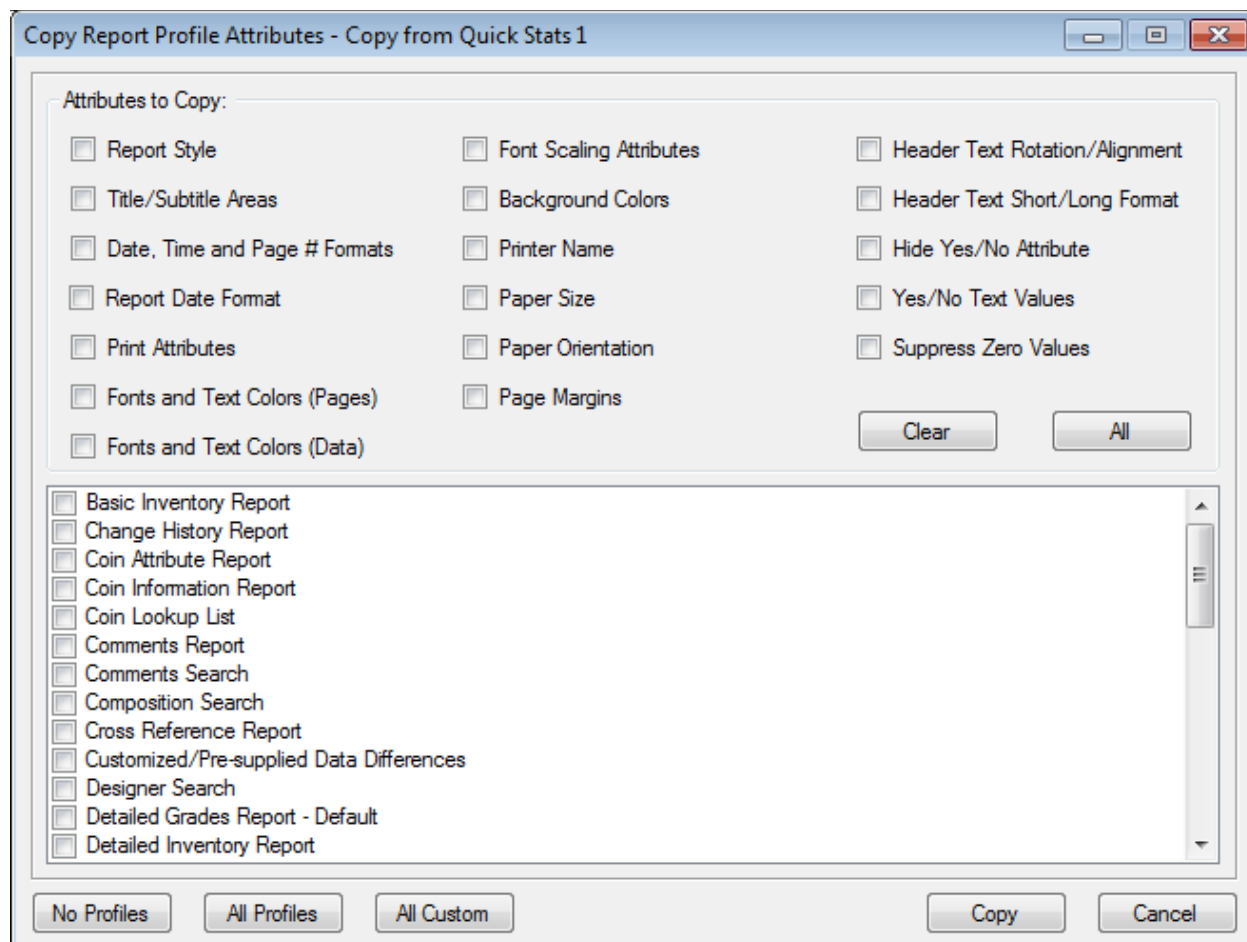
The **Restore** button will undo the previous report profile edit changes by taking the profile from the backup folder and replacing the current copy. When you save changes to any report profile, the current file is saved to the backup folder. There is only one level of undo, as there is only one backup of any report profile.

Note: Supplied profile backups are read only, so a restoration of a supplied file will restore the profile back to the original pre-supplied state.

The restoration screen provides a list of all RPT files stored in the EzCoin Profiles folder. Simply select one or more profiles from the list and click on the **Restore** button.

The **Reset** button will apply default settings to the current report profile.

The **Copy** button allows you to transfer some of the common printing attributes (paper size, orientation, title/subtitle font information, etc.) from the current profile to one or more target profiles.



Note that the title bar shows the source profile you are copying attributes from.

Check any option you wish to copy from the current profile you have selected. Then check which report profiles you want to copy to in the checkbox list at the bottom. Use the 3 buttons to select/deselect multiple profiles. The **All Custom** button will select all profiles which you have created and de-select all pre-supplied profiles from SoftPro.

Note that every target profile will be backed up before the attributes are copied.

Custom Report Assignments

When you create many custom Report Profiles, you might want to be able to assign these to specific reports or searches without changing the default profiles assigned to the items under the Search and Reports menus. This is where the Custom Report Assignments feature helps.

A submenu is available in **Reports** under the **Custom Reports** menu item. This submenu contains 10 custom search/report positions where you can assign a custom profile to, along with the associate search/report type. Use the **Assign or Remove Reports** item under the submenu to attach a search/report to one of the 10 available positions.

The 10 radio buttons are used to select one of the 10 menu positions to assign a report to. As you click each button, the information in this dialog window will change to reflect the report currently assigned to that position.

Report Types

The following searches and reports can be assigned to a custom report position:

Quick Stats 1	Quick Stats 2	Quick Stats 3
Basic Inventory	Detailed Inventory	Customized Coin Information
Catalog ID Cross Reference	Comments Report	Detailed Grades Report
Coin Information	Want List	Priority Want List
Priority Sell List	Purchase History	Sell History
Search: Key Fields	Search: Coin Attributes	Search: Composition
Search: Designer	Search: Mint Details	Search: Supplied Notes
Search: Period	Search: Serial Number	Power Search
Grade Search	Location Search	Comments Search

Custom Field Search	EzBrowse	EzInventory
Data Change History	Price/Market Value Search	Rapid Multi Entry (RME)

Report Profiles

Only customized report profiles can be assigned to a custom report menu position. The pre-supplied “Default” profiles will not appear in this list. Use the Report Profile Editor to create new report profiles, or make copies from any of the pre-supplied stock reports.

Menu Description and Report File Name

When you pick a report profile, the file name and current description embedded in the RPT file will be shown below the profile drop down list. You will not be able to rename the profile; however you can label the report to any text of your choosing. This description is what will appear in the submenu when you select it from the main EzCoin menu.

Exporting and Importing Report Sets

Even though you are limited to 10 custom report positions in the submenu, you can swap out profile sets using the Export and Import buttons. Use the **Clear** button to remove a report from a submenu position. The **Clear All** button will reset all submenu positions to empty status.

Clicking on **Save** will assign the report positions to main EzCoin menu, and also save this information to a special pre-named report set file in the application installation path. This will retain your custom menu assignments after EzCoin has been closed down.

Report Fields Configuration

There are 3 **Report Field Editors** under the **Utility** menu:

- **Standard Reports** contain all the fields which can be included in any search or report in EzCoin which uses a report profile for a country file. Custom fields are not part of this list and are maintained on a per country basis, using a separate editor.
- **Grand Totals Horizontal** contain fields specifically for use in a grand totals report where the grade information is presented horizontally across the page. Unlike standard report fields, a grand totals report works with all country files collectively, and the fields are primarily focused on net quantity and value totals.
- **Grand Totals Vertical** contain fields specifically for use in a grand totals report where the grade information is presented vertically down the page.

Standard Report Fields

There are more than 100 report fields available which can be used in your report profiles. The following table categorizes the fields based on primary and secondary coin information, and special net totals fields.

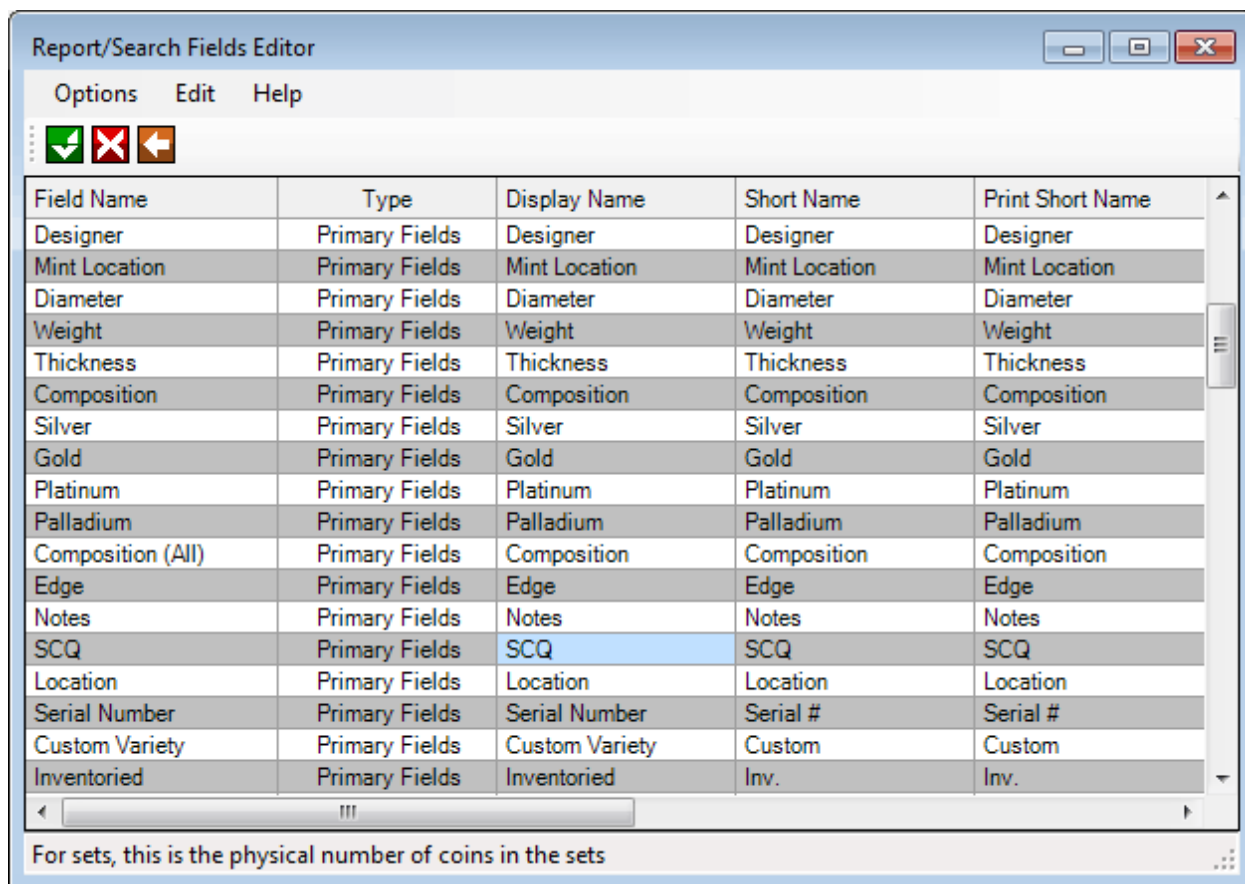
Primary Coin Details	
Denomination	Alternate Pre-supplied Catalog Numbers
Year	Alternate User Catalog Numbers
Type/Reign	Unique Identifier code (UID)
Variety	Duplicate Coin Number
Mint Mark	Set Coin Quantity
Custom Variety Indicator	Inventoried Status Indicator
Price Lock Indicator	Main Variety Indicator
Pre-supplied modified status indicator	Date the coin information was last changed
Secondary Coin Attributes	
Period	Mintage
Proof Mintage	Designer
Mint Location	Diameter
Weight	Thickness
Composition (without precious metals)	Composition (including precious metals)
Silver content	Gold content
Platinum content	Palladium content
Edge	Notes/Description
Pre-supplied special information	Pre-supplied special notes
Your Inventoried Details	

Serial Number	Coin Location (not grade level)
Comments	Custom Fields (based on country file)
Image Links	
Primary Obverse Image	Primary Reverse Image
Alternate Obverse Image	Alternate Reverse Image
Net Values and Quantities	
Total inventoried grades on the coin	Total item quantity for inventoried grades
Net value for all inventoried grades	Total coin count for inventoried grades per coin record
Total records added to the PWL for the coin	Total quantity to buy for all PWL records
Total records added to the PSL for the coin	Total quantity to sell for all PSL records
Total purchase price for all grades in the purchase history for the coin	Total sell price for all grades in the sell history for the coin
Net profit for all grade buy/sell prices	Total coins in the sell history
Total coins in the purchase history	
Inventoried Grades	
Grade Name	Market Value
User Value	Bullion Value
Grade Value	Quantity
Net Value	Coin Quantity
Bullion Value Indicator	Graded By
Grade Comments	Grade Location
Purchase/Sell History	
Purchase/Sell date	Grade Name
Purchase/Sell quantity	Purchase/Sell price
Purchased From/Sold To	Purchase/Sell comments
Priority Want and Sell Lists	
Grade Name	Quantity to Buy/Sell
Type to Buy/Sell	Market Value
Net Value	

Reports and Image Links

An image link is a file name reference to a coin image located on the original EzCoin supplied CD/DVD/BD media, in the EzCoin Images folder of the application path, or in an alternate location you define. The primary image links can be represented on reports as either the image itself, or the file name reference. Primary images are named with the word "link" to denote the file name in a report. For example,

“Obverse Image” is the image to display on the report, and “Obverse Link” is for the file name link on the report.



The report field editor allows you to change display and print attributes for the fields which appear in the report viewer and on printed reports. Some of these fields can also appear in drop down lists and in various dialog windows, or as header labels within data grids. The following table summarizes what field attributes can be modified.

Display Name	This attribute is used in most dropdown lists within EzCoin windows, as header labels in data grids, and as general purpose labels.
Short Name	This label type can be used in data grid headers to shorten the width of the grid columns. A general preference option in EzCoin allows you to switch the data grid header labels from Display Name to Short Name.
Print Short Name	This attribute will populate a printed report's header row if short print names are set at the profile level (short names can also be enabled globally across all reports using an EzCoin

	preference option).
Print Long Name	This attribute defines the label text on printed reports when long labels are in effect. Note that you can rotate the labels on printed reports 90 or 270 degrees to allow for shorter column widths.
Alignment	This attributes determines if the fields should be left, center or right justified within the cell area of a report.
Displayable Characters	<p>For a field which can have a variable number of characters (such as Denomination and Color), EzCoin allows you to define the default number of characters to set for the column width in the report viewer.</p> <p>This is just a default for every report profile. Once you resize a field within the report viewer, the new size gets locked in and saved to a configuration file on a per profile basis.</p> <p>This attribute is not used for printed reports and will not be allowed for any field which is defined as fixed width (such and currency and quantity fields).</p>
Print Width	The default width of the field for printed reports only, measured in inches. Fixed width fields will not allow for this setting, as those field types are auto-sized on the printed report to “just fit” within the cell.
Display Mask	<p>This attribute is specifically used for the report viewer (not printed reports) to define a default “nominal” size for fixed width fields. Printed reports will auto-size as needed. Columns in the report viewer will set a default size for fixed width fields based on the text value defined in the display mask.</p> <p>The mask doesn’t require any special format – it’s just a collection of arbitrary characters which makes up a default text value. You can use strings such as “Abcdef”, “9,999-99” or “123xYz” for any field mask. EzCoin will simply measure the on-screen width of this text value and use that to set the cell’s column width in the report viewer.</p> <p>Once you resize columns in the report viewer, the new widths are saved individually on a per-report basis.</p>

Field Types

The fields are grouped according to primary and secondary types:

Primary Fields	Main coin details and inventoried attributes.
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Comments	The main comments for the coin record.
Special Info	Special pre-supplied notes and information.
Grade Data	Inventoried grade information.
Purchase History	Fields which are part of the purchase history.
Sell History	Fields which are part of the sell history.
Priority Want List	Fields which are part of the priority want list.
Priority Sell List	Fields which are part of the priority sell list.

Custom fields are not defined in this list. Refer to the custom fields edit utility for more information. You assign custom fields to a report profile from the profile editor, and set the printing/display attributes for these fields from the custom fields editor.

Data Types and Attribute Restrictions

A field has a base data type and a report data type. The base data type can be one of the following:

- A general purpose text field.
- A Yes/No status field.
- An image (image is displayed/printed) or image link (file name is displayed/printed).
- A currency field.
- A numeric value which can include fractions.
- A whole number value which can't have fractions.
- A date field (which can't include a time component).

The field is further classified by EzCoin with a print attribute used for printed reports only, which can be one of the following:

Fixed Width: The field will never be truncated or resized on a printed report. This type is reserved for dates, currency and quantity fields.

Multiline: The text information will not be truncated or resized, but will instead wrap around to multiple lines on printed reports, causing the data row to grow taller.

Truncated: The text information will always occupy one line of text on the report. However, if the text value doesn't fit within the cell width, it will be resized (the font

size will shrink as needed), and if it still doesn't fit, it will be truncated on the right and marked as such using the ellipsis (...) notation.

Image: The cell is defined to contain an image, and as such will be sized based on the cell image size in the EzCoin general preferences.

When editing the display mask, print width, or number of characters attributes in the editor, the ability to do so is based on the field's print attribute type.

- The Display Mask can be changed for Fixed Width field types.
- The Display Characters and Print Width can be changed for Truncated and Multi-line field types.

Editing Field Data

To change settings for a field, move the cell cursor to the field you want to change and press F2 (or start typing with any valid character). Press ENTER to save the new cell value, or ESC to cancel the change.

You will not be able to edit any read-only cell in the grid – this will be indicated using a different text and background color.

Undo and Revert

Use the **Undo** option to restore all field settings back to the original values before you made any changes. Use the **Revert** option to restore all fields back to pre-supplied values. EzCoin maintains a read-only copy of all field settings to allow for a full restoration.

Revert and Supplied Data Updates

If SoftPro makes any changes to the read-only copy of the report fields from a supplied data update, they will NOT be applied to your copy of the configuration. You will need to use the Revert option to see the changes. The only exception to this is when SoftPro adds new report fields in the future – these will automatically show up in your configuration.

Any changes between current and pre-supplied data field values will be shown in the data grid with different cell coloring. When reverting back to pre-supplied data, you can choose to revert some or all of the attributes, and also choose if you only want to revert on the current selected row.

Copy and Paste

You can use the **Copy** and **Paste** options in the **Edit** menu to copy the contents of one cell to another.

Setting a Global Currency Mask

Use this option in the **Edit** menu to change the mask value for all currency fields.

Note: There is no similar option for quantity fields, as they have variable sizes – use the Copy and Paste options to quickly change a quantity mask for multiple fields.

Grand Totals Field Editor

This editor is identical to the standard report field editor. The only difference is that the field list is based on the grand totals reports only and will contain a basic set of summary totals information.

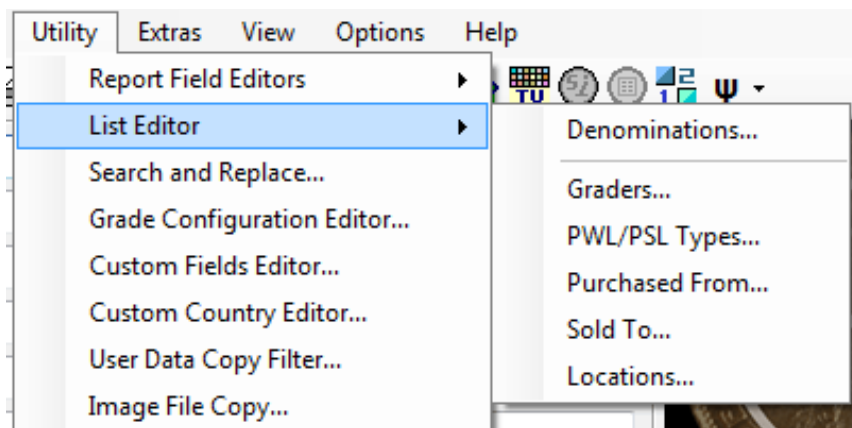
Utilities

List Editors

EzCoin maintains lists of text values for the following:

- Denominations (per country file)
- Graders
- Priority Want/Sell List Types
- Who you purchase coins from or sell coins to
- Coin locations

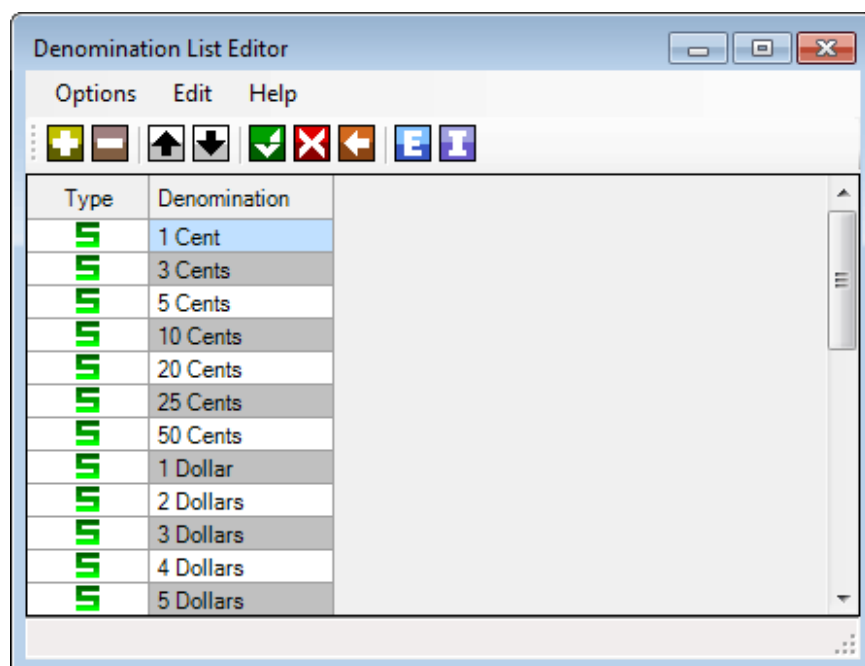
The editor for these lists is accessed from the **List Editor** submenu under **Utility**.



Denominations Editor

A denomination list is slightly different than the other text lists, in 2 specific ways.

- The list is specific to each country file.
- The sort order of the list determines how the denominations are displayed in reports, and how the coin navigation works (stepping forwards and backwards through coins sorted by denomination).



Denominations can be pre-supplied by SoftPro or custom ones you create. The editor will display a pre-supplied denomination with a green “S” icon in the list, and custom values you create will be shown with a red “U” icon.

Toolbar Options



1.	Add a new denomination. Note that newly added values will always be placed at the end of the list.
2.	Remove selected denominations. You will not be allowed to remove a pre-supplied denomination. You always will not be allowed to remove a custom denomination if it's currently being used by one or more coin records.
3.	Use the arrow buttons to move selected entries up and down in the list. Hold down the CTRL key to move the selection to the beginning or end of the list.
4.	Click this button to save all changes. Note that if you changed the sort order for the denominations, EzCoin will need to re-index the coin inventory for this new sort order.
5.	Click this button to cancel all changes and close the editor.
6.	Click this button to undo all changes and restore the list to the original state when you first launched the editor.

7.	Denomination lists can be exported to a file and then imported at any time into the same or a different country file. An exported file will have an extension of .DEN.
8.	Note that the import facility doesn't touch the current displayed list. What EzCoin will do is check all denominations in the .DEN file and if there are any new denominations, they will be appended to the existing list.

Restoring Denominations

You can restore missing denominations from the current country file using the **Restore Denominations** item from the **Options** menu. EzCoin will scan every coin record in the country file for denominations and re-insert them back to the list if any are missing. This option should never be needed under normal EzCoin usage.

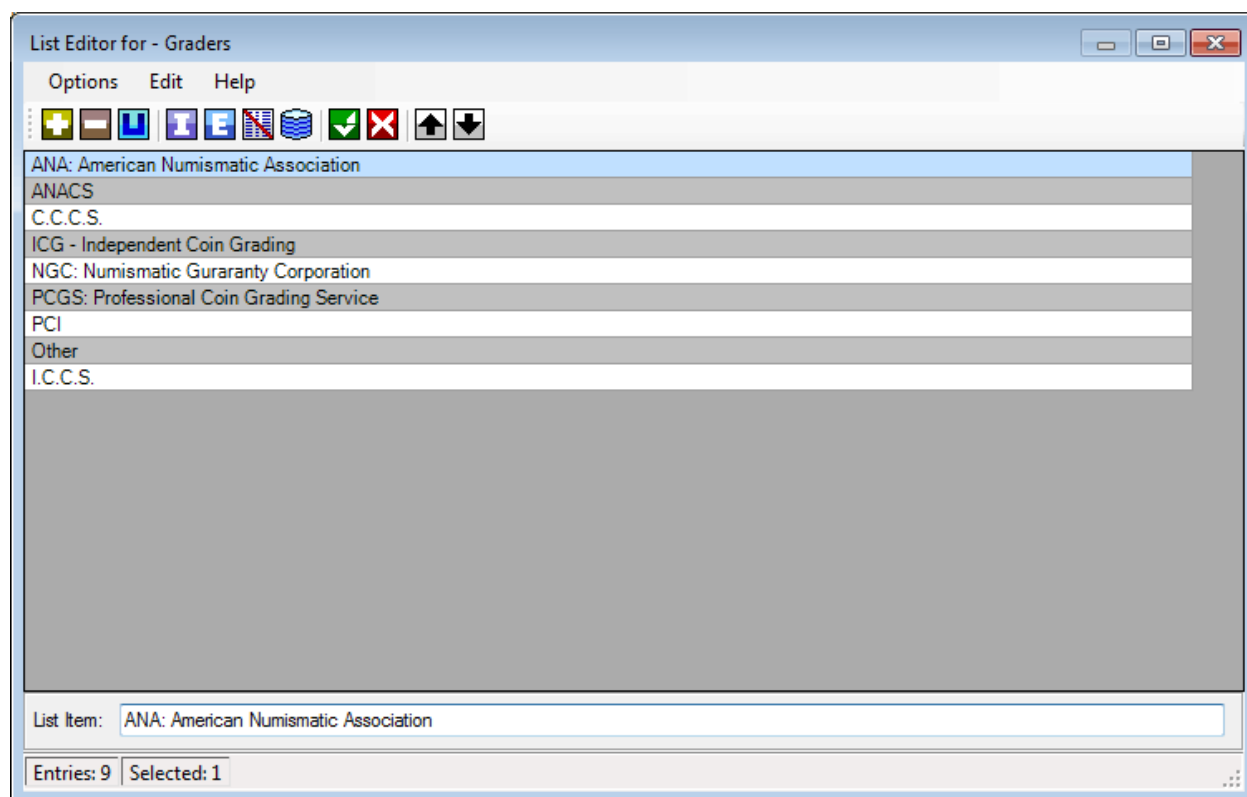
Renaming Denominations

There may be a case where you create a new denomination, and started adding new coins under this value to the country file, only to notice that the denomination was misspelled (EzCoin denominations are case-sensitive, be aware of this).

You can rename a custom denomination by choosing the **Rename Denomination** item from the **Options** menu. EzCoin will rename all references for this denomination wherever they may occur in the country file.

Generic List Editor

The other list types use alphabetically sorted text values. As such, the editor window uses a simpler design.

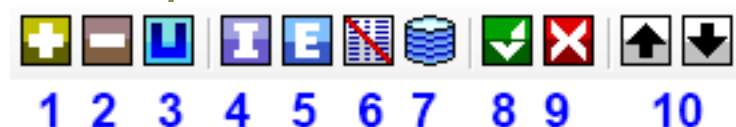


Each item in the list can be edited (renamed or removed) and new items can be added at any time.

The lists grow with new entries being added to the end, when adding items from the main EzCoin screen, or from Report Views. To keep the lists in a sorted order, you can use the editor to automatically sort the list, or you can manually select one or more list items and use the Up and Down buttons.

When you select a value in the list, it's current text string will appear in the **List Item** edit field.

Toolbar Options



1.	Add the text in the bottom input field as a new entry in the list. If the item already exists, you will be given a warning message, as EzCoin doesn't allow duplicate items in a list.
2.	Remove selected items from the list. If you remove items, in most cases you can get them back, provided: <ol style="list-style-type: none"> They are a pre-supplied list item from SoftPro.

	b. The item is currently used in one or more inventoried coin records. In any other case, once you save changes to the list after removing items, you will not be able to get them back (lists can be saved as part of an EzCoin data backup, or by using the export option).
3.	The current selected list item will be updated with the text in the bottom input field. If no items are selected, or more than 1 item is selected, this option has no effect.
4. 5.	The import and export icons provide the ability to store lists as external files. Lists can only be exported as UTF-8 format text files with a .TXT extension. Importing lists can also accept .TXT text files or as .LST list files. LST files are only provided by SoftPro.
6.	This option will erase all items in the list.
7.	This option is only enabled if you have a country file currently opened. EzCoin has the ability to check all coin records to see if any list items exist which may have been deleted. For example, if you refresh Graders from the country file, every inventoried grade record will be checked for a Grader value and added to the list if it doesn't exist. This is the only way to get deleted list values back outside of an import file or a backup archive.
8.	Click this button to save all changed made since you launched the editor.
9.	Click this button to cancel all changes and close the editor window.
10.	Use the up and down buttons to move the selected list items in the list for a custom sort order. Hold down the Ctrl button while clicking to move the selected items to the start or end of the list.

Sorting Lists

Choose the Sort option from the Edit menu (or press F5) and you will have a choice to sort the list Alphabetically or Numerically.

A numeric sort looks at the start of each list item, for up to 18 digits which can be determined to be a number. If this is the case, the numeric values will always come before the non-numeric values and be sorted as numbers.

Since EzCoin will not automatically maintain a list in sorted order when you add new items (i.e. add a new location when inventorying a new coin record), you will need to make use of the sorting feature in the list editor from time to time.

Reverting to a Supplied List

This option is available in the **Options** menu, and allows you to restore the current list of pre-supplied entries. All of your custom entries will be left intact, and only

pre-supplied values are replaced with the original backup data. This option is available for Graders, Purchased From, Sold To and Priority Want/Sell List types.

List Import Merges

When importing from .TXT or .LST files, the current list will be left intact. All new text additions will be attached to the end of this list. Any duplicate items will automatically be ignored.

Search and Replace

This option allows you to perform a search against all coin records in the current country file and replace values as needed. The search functionality is split into 3 separate windows:

- The search window, which provides the input conditions to find coin records. It works much the same as a single level Power Search.
- The results window, which is a simple data grid showing matching records in a manner similar to the Coin List Viewer.
- The replacement window, which allows you to replace existing values with new ones.

Search Window

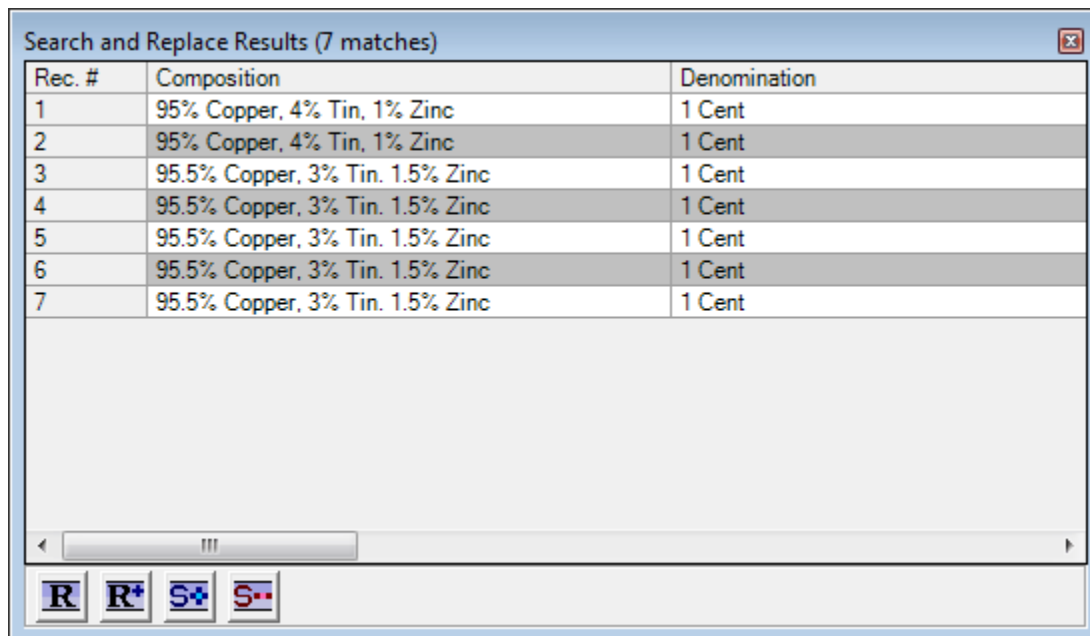
The search window is displayed when you choose the Search and Replace option from the Utility menu. **Note:** Only inventoried records can be searched upon.

Search Category	<p>Similar to the Power Search, the following categories are available:</p> <ul style="list-style-type: none"> • Primary Coin Fields • Custom Fields • Inventoried Grades • Priority Want List • Priority Sell List • Purchase History • Sell History
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	When you choose a category, the Search Field will be populated for all valid fields associated with the category. Unlike a Power Search, you can't choose multiple fields to search on at one time – only 1 field can be selected for a given search.
Search Field	Only replaceable fields will be shown in this drop down list based on the search category. Any fields which are read-only can't be part of a search and replace.
Search Method	This method defines how to compare the search values you enter to the field contents in the coin record.
Search From/For	If you have entered a search method which requires a matching value, this field is displayed and expects you to enter something.
Search To	If you have chosen the Between search method, then you must provide a start and end value to search against.
Case-Sensitive	For text fields, this option is available to force all text comparisons to distinguish between upper and lower case letters.

Click on **Search** to begin. EzCoin will look at every record for a matching condition. The total record match count will be shown in the status bar. If at least one match is found, you can click on the **Show** button to display the matching records.

Results Window



Rec. #	Composition	Denomination
1	95% Copper, 4% Tin, 1% Zinc	1 Cent
2	95% Copper, 4% Tin, 1% Zinc	1 Cent
3	95.5% Copper, 3% Tin, 1.5% Zinc	1 Cent
4	95.5% Copper, 3% Tin, 1.5% Zinc	1 Cent
5	95.5% Copper, 3% Tin, 1.5% Zinc	1 Cent
6	95.5% Copper, 3% Tin, 1.5% Zinc	1 Cent
7	95.5% Copper, 3% Tin, 1.5% Zinc	1 Cent

This window can be dragged around and resized independently from the main EzCoin window. You can continue to work within the main window while the search results are displayed. You can close the search results window at any time.

The records displayed contain only the matching record key and the matching value as follows:

- The first column always contains the search field and the record's current value.
- Denomination
- Year
- Type/Reign
- Variety
- Mint Mark
- If the search category was for secondary coin information (PWL, PSL, Purchase or Sell History), the grade value will always be shown as the second column.

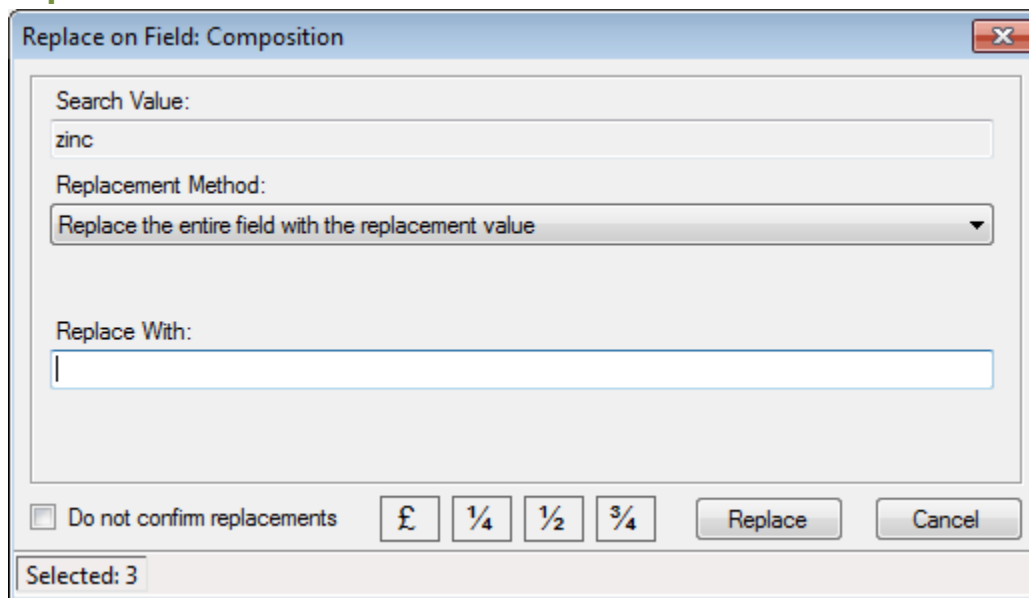
For secondary coin information, it's possible the results window will show several rows for the same coin record. Duplicate coin records can also show up in the results.

The toolbar at the bottom of the window contains the options you can apply to the search results.



1.	Perform a replacement on selected rows only.
2.	Perform a replacement against all rows in the data grid.
3.	Select all rows in the data grid.
4.	Select nothing (deselect all rows in the data grid).

Replacement Window



This window provides a replacement method and a replacement value.

The original search value is displayed in the Search Value field. If the search method didn't require a search value (i.e. a Not Empty search method), then this field will be blank.

The replacement method can be one of the following. Depending on the search value and the data type, not all of these options will be available.

- Replace all occurrences of the search value with the replacement value (text fields only, and only if the search method is of type: Contains, Starts With, Ends With, or Equals).
- Insert the replacement value before the current field value (text fields only).
- Append the replacement value after the current field value (text fields only).
- Replace the entire field with the replacement value.

The *Do not confirm replacements* option, if unchecked, will provide a confirmation every time you click the Replace button. It will NOT prompt you for every replacement on a per record basis. If you have selected 12 records to replace from the results data grid, you will only be asked to confirm one time.

Once changes are made, the original values in the search list will be updated to show new values. Keep in mind that when a value changes, the original value is lost, and this means that the *replace all occurrences drop down option* will no longer match on the original value, since it's been changed.

Grade Configuration Editor

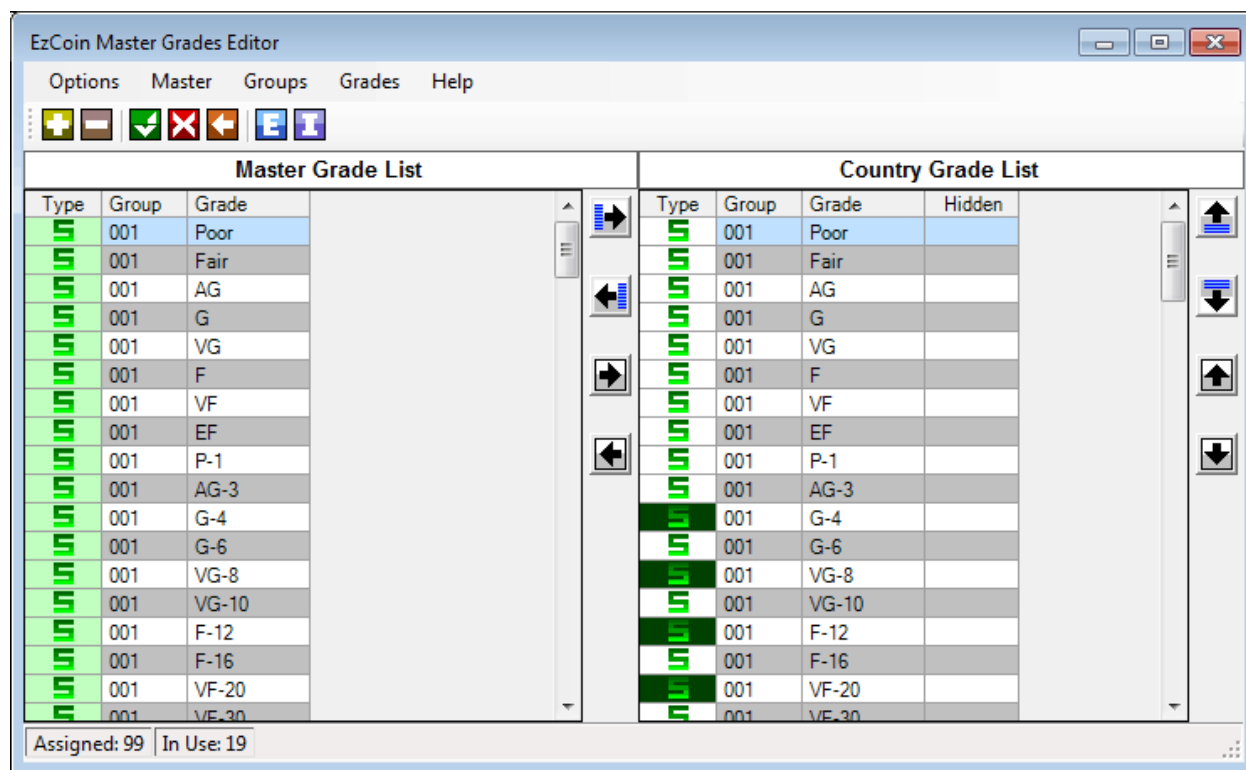
EzCoin associates a standard grade list with any given country. The default master grade list used by every country file will contain all of the grades available to use. When assigning grades to a country file, the master list will always be the source.

EzCoin provides the following default grades which can be used for any country. They are grouped into sets using a Group ID value. This is a carryover from EzCoin version 1. In version 2, you are free to decouple grades from a group and assign them to country files on an individual basis.

Poor	001		SP	004		PROOF	007		MS-60RD	010
Fair	001		SP-60	004		PF	007		MS-61RD	010
AG	001		SP-61	004		PF-60	007		MS-62RD	010
G	001		SP-62	004		PF-61	007		MS-63RD	010
VG	001		SP-63	004		PF-62	007		MS-64RD	010
F	001		SP-64	004		PF-63	007		MS-65RD	010
VF	001		SP-65	004		PF-64	007		MS-66RD	010
EF	001		SP-66	004		PF-65	007		MS-67RD	010
P-1	001		SP-67	004		PF-66	007		MS-68RD	010
AG-3	001		SP-68	004		PF-67	007		MS-69RD	010
G-4	001		SP-69	004		PF-68	007		MS-70RD	010
G-6	001		SP-70	004		PF-69	007			
VG-8	001					PF-70	007		GEM	011
VG-10	001		UNC	005						
F-12	001		UNC-60	005		PL	008		FDC	012
F-16	001		UNC-61	005		PL-60	008			
VF-20	001		UNC-62	005		PL-61	008		CAM	013
VF-30	001		UNC-63	005		PL-62	008		CAM-60	013
EF-40	001		UNC-64	005		PL-63	008		CAM-61	013
EF-45	001		UNC-65	005		PL-64	008		CAM-62	013
			UNC-66	005		PL-65	008		CAM-63	013
AU	002		UNC-67	005		PL-66	008		CAM-64	013
AU-50	002		UNC-68	005		PL-67	008		CAM-65	013
AU-55	002		UNC-69	005		PL-68	008		CAM-66	013
AU-57	002		UNC-70	005		PL-69	008		CAM-67	013
AU-58	002					PL-70	008		CAM-68	013
AU-59	002		BU	006					CAM-69	013
			BU-60	006		MS-60RB	009		CAM-70	013
MS	003		BU-61	006		MS-61RB	009			
MS-60	003		BU-62	006		MS-62RB	009		BULLION	BLN
MS-61	003		BU-63	006		MS-63RB	009			
MS-62	003		BU-64	006		MS-64RB	009			
MS-63	003		BU-65	006		MS-65RB	009			
MS-64	003		BU-66	006		MS-66RB	009			
MS-65	003		BU-67	006		MS-67RB	009			
MS-66	003		BU-68	006		MS-68RB	009			
MS-67	003		BU-69	006		MS-69RB	009			
MS-68	003		BU-70	006		MS-70RB	009			
MS-69	003									

MS-70	003								
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The grades editor can be accessed from the **Grades Configuration Editor** from the **Utility** menu.



The left side of the window shows the master grade list, from which all grades for a country must come from. The right side shows the assigned grades for the current open country file.

Icon Status and Color Coding

The master field list will contain either an "S" icon for pre-supplied grades, or a "U" icon for user/custom grades you create.

If the background color is shaded green behind the icon, it indicates the grade is assigned to the country.

The list on the right for assigned grades to the current country uses a similar color coding. If the S/U icon has dark green background, then the grade is currently in use and can't be removed from the country. A grade is considered in use if it's associated with any of the following:

- Inventoried grade
- Priority Want List
- Priority Sell List

- Purchase History
- Sell History
- A market value exists

Toolbar Options



1.	Add a new custom grade.
2.	Remove custom grades. You can't remove a pre-supplied grade, or remove a custom grade if the grade is in use.
3.	Save all changes and close the editor.
4.	Cancel all changes and close the editor.
5.	Undo all changes.
6.	Export the assigned grade list to a file.
7.	Import the assigned grade list from a file.

Exporting and Importing Grades

If you wish to use custom grade configurations in other country files, or maintain a backup copy of your configuration, use the export option. This will save the grade definitions to a file with a .GRD extension. You can import grade files provided that this will not result in removal of custom grades which are already being used by the country.

Assigning and Removing Grades

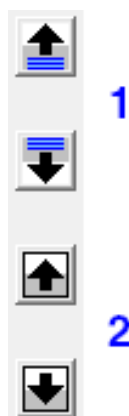
Grades can be assigned by group or individually to a country. This is accomplished with the 4 buttons between the 2 grade lists.



1.	<p>These 2 buttons will move grades by group ID as a set. The left arrow button removes the group from the country, the right arrow assigns it.</p> <p>As a shortcut, you can double click on any grade assigned to group in the lists. Double click in the master list to assign the group, double click in the country list to remove the group.</p>
2.	<p>These 2 buttons move selected grades individually.</p> <p>As a short cut, you can assign grades by right clicking a selection of grades in the master list, or right clicking a selection in the country list to remove.</p>

You will not be able to remove any grade if it's currently in use by the country.

The buttons to the right of the assigned grade list control the sort/display order of the grades as they will appear in the data grids in EzCoin.



1.	<p>These 2 buttons will move grades up and down in the assigned list by group ID as a set. Hold down the SHIFT key while clicking to move the group to the</p>
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	beginning or end of the list.
2.	<p>These 2 buttons move selected grades individually up and down in the assigned list.</p> <p>Note that once you select a single grade and move it by group, all of the grades for the group will be collected into a single ordered group as they appear in the master grade list - you will lose any individual grade ordering in this case.</p>

Deleting and Renaming Grades and Groups

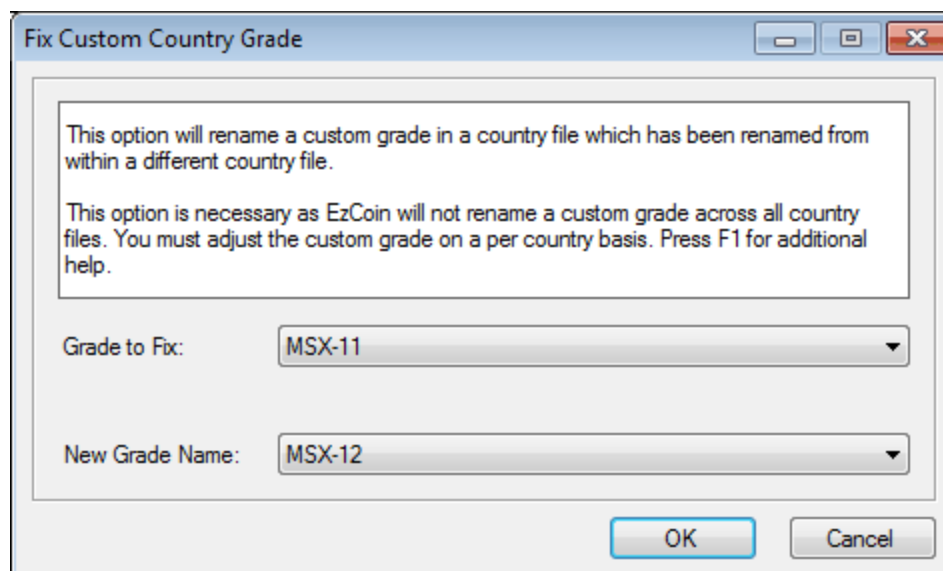
Options in the **Master** menu allow you to rename and delete grades/groups.

You will not be able to delete any grade if it's currently in use by the country as an inventoried grade, part of the purchase/sell history, the priority want/sell lists, or has a market value assigned to it.

You can't rename or delete a grade pre-supplied by SoftPro.

Note: EzCoin doesn't track grade usage across other country files - it's possible to remove a grade from the master list that's unique to a different country file and not in use by the current country. If you do delete such a grade, EzCoin will attempt to add it back in the master list for you the next time you run the grades editor.

Custom grades can be renamed, but care must be taken if the grade is in use by multiple country files. EzCoin can only rename the grade within the current open country file. If the grade is in use in multiple country files, you must rename the grade for each country file in turn. A menu option named **Fix Custom Country Grade** can be used. A dialog like the one below will appear.



Consider this example.

- You create a grade named MSX-11 while in currently working in the grades editor with the USA country file opened.
- You inventory some coins with this grade.
- You now open CANADA and use the grades editor to change this to MSX-12. This would only fix coin records assigned to Canada for MSX-11 and update their grades to MSX-12. This will not fix USA, which is still on the old MSX-11 grade.
- When you open USA again, and run the grades editor, EzCoin will detect that the country has a grade being used named MSX-11, even though you renamed it to MSX-12 while working within the Canada country file. The master list will show both MSX-11 and MSX-12, even though MSX-11 has been renamed. The assigned country list will show MSX-11, since USA is still using the old grade name.
- To rename the grade from MSX-11 to MSX-12, you will choose the 2 grades from the above dialog as shown above. EzCoin will rename MSX-11 to MSX-12 for USA.

Care must be taken that no coins are using grade MSX-12 in USA when trying to fix the original MSX-11 grade. If this happens, EzCoin can't fix the problem, as you would be attempting to merge coin records with MSX-11 grades with coin records containing MSX-12 grades. Grade merging is not possible at this point.

The bottom line is: Try not to rename custom grades after they are already being used by coin records. If you must rename them after this point, take care to fix all of your country files which use the old grade and change it to the new grade immediately.

Group names can be changed for any custom grades as you see fit. As the group names are only used to manage grade configurations, and don't have any value in reports and inventoried coin records, they can be renamed at any time. However, you will not be able to rename pre-supplied group names from SoftPro.

Setting Grade Visibility

If you find that there are too many pre-supplied grades to work with for a country, you can hide some of them using the **Show/Hide Grade Visibility** options from the **Grades** menu.

The grades will still be available for the country, and can still contain existing coin data - you've simply decided to hide their visibility in EzCoin. For this reason, take care to only hide grades which you have no intention to attach to your inventory, priority want/sell lists or purchase/sell history.

Restoring Grades from Backup

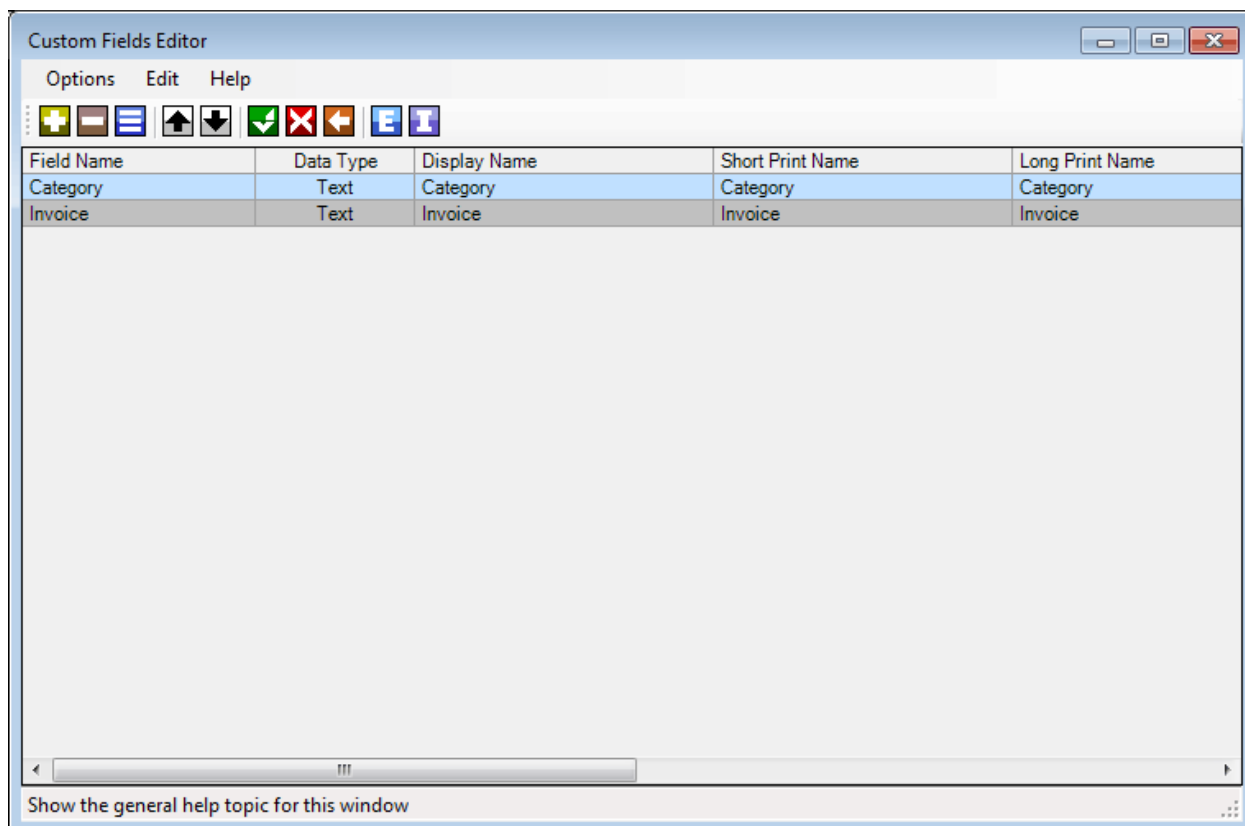
There are 2 items under the Options menu.

Restore Country Grades only applies to country files which have pre-supplied grade information from SoftPro. Pre-supplied grade lists are saved in the country file as a backup copy. You can choose to restore the pre-supplied list at any time. Custom grades you have assigned to the country will be left intact.

Restore Master Grades will use the EzCoin pre-supplied master grade backup file to restore any pre-supplied grade information to the master grade list. Any custom grades will be left intact in the master list.

Custom Fields Editor

Custom fields are provided to allow you to extend the basic information provided for coin records. By default no custom fields are provided for any pre-supplied country. You create custom fields using the **Custom Fields Editor** under the **Utility** menu, or you can automatically generate them from any import from prior versions of EzCoin. The custom fields created from older EzCoin imports will automatically generate the same fields and data types from the older version, and preserve all your custom data for the coin records you exported.



The custom fields editor works similar to the Report Fields editor, with the same toolbar options. A custom field is defined with the following attributes. Many of these attributes are common to the report field master list.

Field Name	The field as it will uniquely be identified in EzCoin.
Data Type	The type of data, which can be any of the following: <ul style="list-style-type: none"> • Plain text, in mixed case format • Upper case text • Whole numbers without fractions (i.e. quantities) • Currency • Numeric with fractions • Date (without the time component)

	<ul style="list-style-type: none"> • Yes/No status • Image link (file path + file name format) • Web URL (or any type of document) • Category (allows for multiple categories per coin) <p>Note: EzCoin version 1 contained a Time data type. If imported from the old version, the value is converted to a string format.</p>
Display Name	The name as it will appear on screen and in reports.
Short Print Name	The short format of the field as it will appear in header labels on printed reports.
Long Print Name	An alternate long format for the printed name.
Alignment	How the field value is justified on reports: Left, Centered, or Right.
Print Type	Fixed width, truncated, or multi-line using automatic word wrapping. Not all print types are available for a given data type.
Visible	If a field is not visible, it won't appear in reports or in the custom fields edit windows.
Totals	The field will show a grand total at the bottom of the report by adding all the row values for the field together. Test fields cannot be totaled.
Copy	The field will automatically have its inventoried value copied to the next non-inventoried pre-supplied record when stepping through a country file.
Searchable	The field is available in Power Search and other dialog windows where custom fields can be used in country file searches.
Reportable	The field is available to add to a custom report profile.
Display Chars	For a data type which is not a fixed width print type, you can enter the number of characters to define a default display width for the column.
Print Width	This is the default print width for multi-line and truncated print types, measured in inches.
Display Mask	For a data type which is a fixed width print type, you can enter any arbitrary set of characters to create the "default width" for the report viewer columns. This value is not used for printed reports.

Toolbar Options



1.	Add a new custom field.
2.	Remove custom fields. You can't remove a field if you have any inventoried coin records which are using it.
3.	Edit the selected field.
4.	Move the selected fields up or down in the list.
5.	Save all changes and close the editor.
6.	Cancel all changes and close the editor.
7.	Undo all changes.
8.	Export and import custom field files.

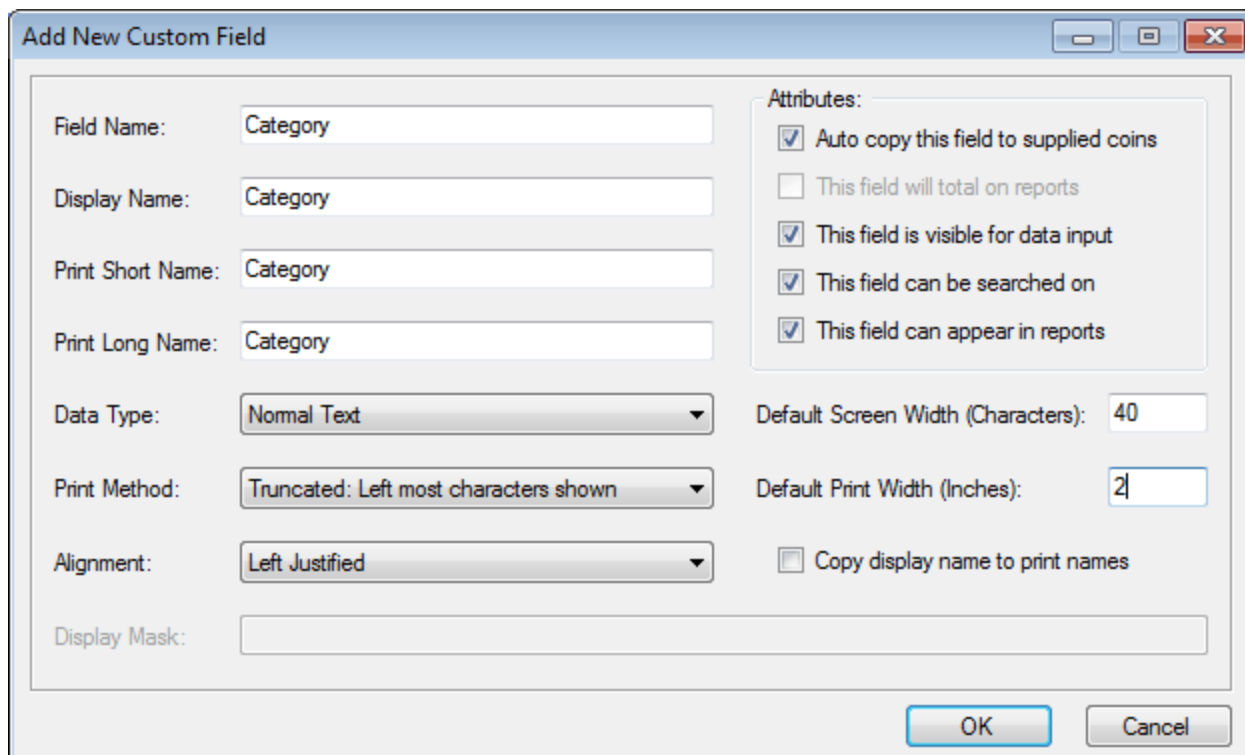
Web URL and Image Link Types

Image links for custom fields can reference any valid image file in any location. As such, an image link is stored with a full path name along with the file name.

Web URL data types are primarily intended to reference a Web site. However, you can set a URL data type to point to any type of file as well.

Adding and Editing Custom Fields

Click on the + icon to add a new custom field.



This window provides all of the attributes to define a custom field. Depending on the data type and print method chosen, some of the other options will automatically be disabled.

To edit an existing custom field, select it and click on the edit icon, or double click the row in the data grid. The edit window is identical to one use to add new fields.

Field Ordering

The order in which the fields are displayed in the editor window is how they will appear in EzCoin in any window which displays them (custom fields secondary window, dropdown lists, etc.). You can change the field order by selecting rows in the editor and moving them using the up/down arrows in the toolbar. Hold down the CTRL key while clicking to move the selection to the start or end of the list.

Exporting Custom Fields

If you wish to use custom field configurations in other country files, or maintain a backup copy of your configuration, use the export option. This will save the fields to a file with a .CFF extension. You can NOT import custom fields if you currently have an existing custom field configuration with active inventoried data.

Renaming In-Use Fields

If a field already has inventoried data associated with it, you can't rename it using the normal edit dialog window. EzCoin stores the field name with each data value in the individual coin records. To rename a field which is in use, use the special option

named **Rename a Field with Data**. EzCoin will individually adjust each coin record to use the new name.

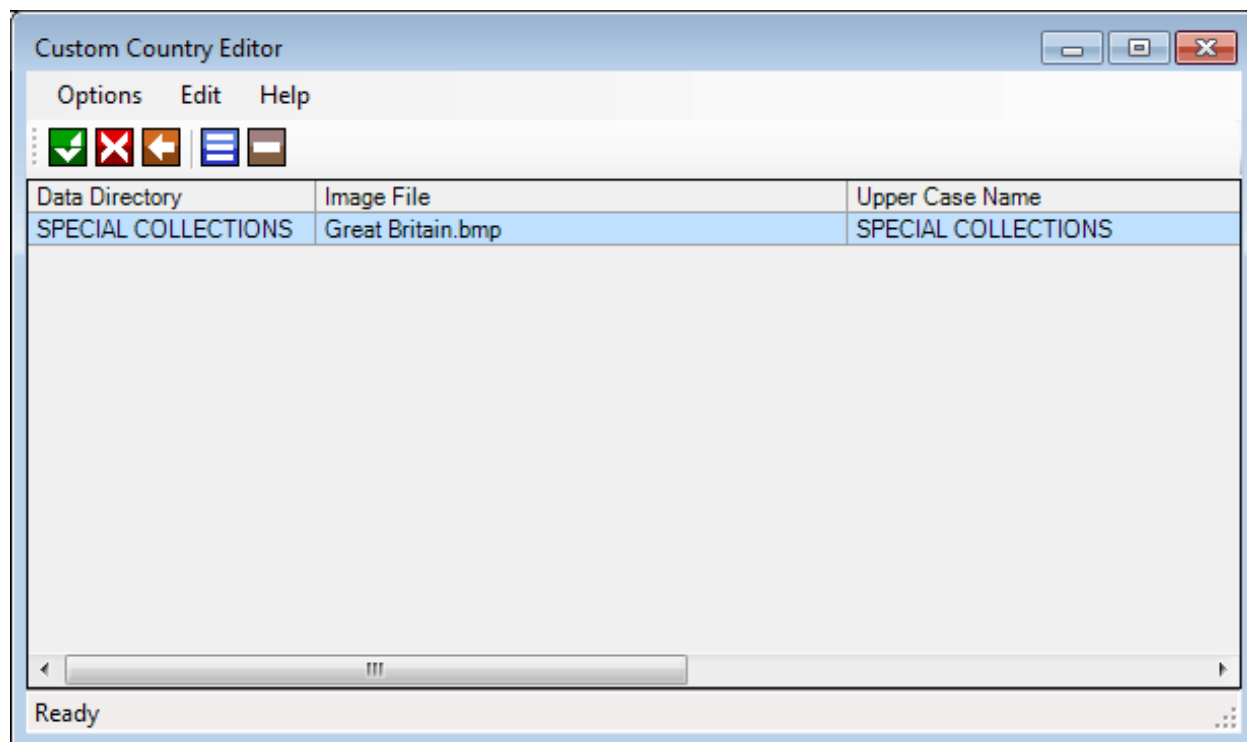
Deleting In-Use Fields

If you want to delete a custom field, EzCoin will not allow you to do so using the remove field icon if any inventoried records have data on that field. You can use the special option named **Delete Fields & Data** to remove the custom field, and also any data values from all coin records for that field.

Custom Country Editor

EzCoin has an internal country list with more than 500 entries. When you create a custom country file, you can select from one of the pre-supplied country names, or choose to create a completely new country reference. Any country file name which is not recognized by EzCoin as a pre-supplied value will automatically be stored in a separate area reserved for *Custom Countries*.

An editor is provided under the **Utility** menu. Use this editor to review or make changes to any custom country.



The editor has no provision to add new custom countries, as this is handled automatically from the New Country option in EzCoin. What you can do is change the settings for an existing country, or delete the country record entirely. EzCoin will not allow you to remove a country which is already in use.

The edit option allows you to change any of the following attributes:

Data Directory Name	This is the name under which all images are associated, and also uniquely identifies the country. You will not be able to use any data directory name which is already reserved for pre-supplied countries.
Upper Case Name	The upper case version of the country name.
Mixed Case Name	The mixed case version of the country name.

Flag/Image File	This drop down list contains all flag images stored in a special folder in EzCoin.
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Removing Custom Countries

When creating a new custom country using the **New** option from the **File** menu, EzCoin will automatically add the country name to the current Custom Country list, which is maintained separately from the pre-supplied list. As long as you have at least one country file (.SDF file in the DB folder) active in EzCoin, you can't remove the custom country – it's in use.

If you want to remove a custom country from the list, you must use the **Remove Country** option in the **Country Data File Utilities** submenu and remove every SDF file associated with the custom country name.

Custom Flag Images

Flag images are created using 2 sizes:

- Small flags are 80 pixels wide by 50 pixels tall.
- Large flags are 176 pixels wide by 110 pixels tall.

The pre-supplied images are in Windows RLE Bitmap (.BMP) format, using 256 colors.

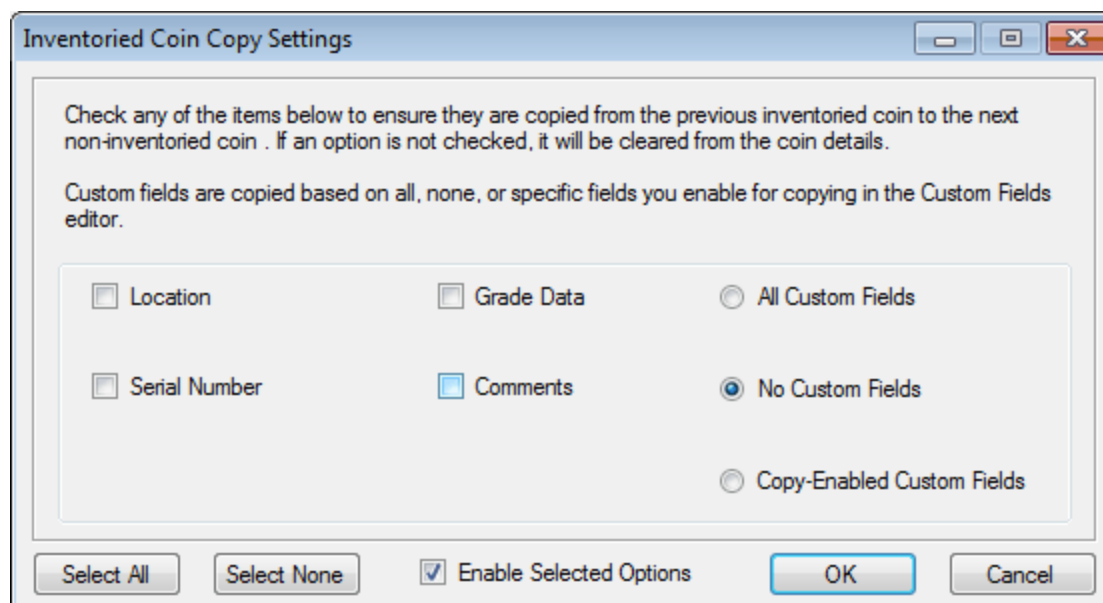
Images are stored in the Images folder in the EzCoin application path. A subfolder named ~~Flags\Small contains the small image files, and the ~~Flags\Large contains the large image files.

If you want to use a custom flag image for your custom countries, then you will need to create 2 image files in the proper sizes, and manually copy them into the 2 subfolders. Once you do this, they will become available in the drop down list. You are not permitted to use the same file names as existing pre-supplied flag images.

User Data Copy Filter

The copy data filter by default is disabled in EzCoin. When enabled, this option will transfer over some basic non-pre-supplied coin information to the next pre-supplied record. This feature doesn't have any benefit for custom country files which have no pre-supplied coin records from SoftPro.

To enable the data copy filter, choose the **User Data Copy Filter** option from the **Utility** menu.



There are 5 field filters for inventoried data, plus special copy settings for your custom fields. At the bottom of the window is an on/off switch for enabling all of these options.

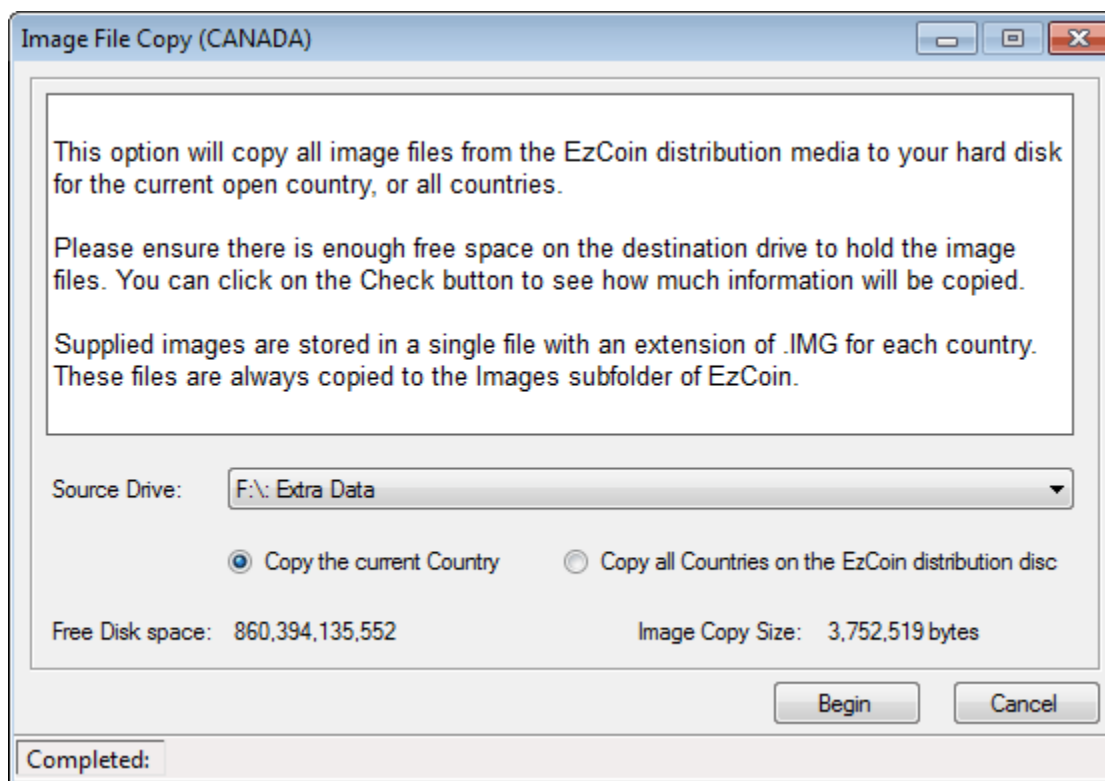
If you un-check **Enable Selected Options**, then all user copy functionality is disabled, regardless of the other checkbox checked states – the options are all grayed out.

- For Grade options, all inventoried grades and their associated attributes will be copied from the previous inventoried coin record to the next available pre-supplied coin record from SoftPro which is not inventoried.
- The custom fields copy option can be used as an on/off switch, using the first 2 radio buttons. The bottom radio button, if chosen, will only copy custom field data for fields which are defined to be *User Data Copy Enabled*. Refer to the documentation for the custom fields editor.

Image File Copy

When you install EzCoin, the image files are not copied to your hard disk installation path. As such, you will need to keep the EzCoin distribution disc in your drive to view the images.

If you want to copy the image files to your hard disk, you can use the **Image File Copy** option from the **Utility** menu.



If you have a country file currently open, it will be displayed in the title bar and the radio button option **Copy the current Country** will be enabled and selected by default.

The **Source Drive** dropdown list will show all available removable media drives on your system. Network drives and hard disks will not appear, as they are not valid sources for disc media copy.

Check the all countries option to copy all image files for every country on the disc. Use the current country option to only copy file for the open country file.

Note that distribution images are provided as a single archive file per country with an extension of .IMG and the file name equal to the country name. These IMG files will always be copied to the **Images** subfolder where you installed EzCoin to.

Note: If you chose the default EzCoin setup options in the EzSetup program, then the image files would have already been copied for you.

Custom Image Link Comparison

This utility will display a list of all custom coin images which you've attached to a country file with pre-supplied data from SoftPro. For custom country files without pre-supplied data, the utility will not be available.

The option is available as **Custom Image Links** from the **Utility** menu. The intent of the utility is to provide a side by side comparison of pre-supplied images with custom images you have chosen as a replacement. In addition, coin records which have only your custom images will also be displayed.

Pre-supplied and Custom Image Link Comparison

Supplied Links (Alternate Available)		Your Links (Alternate Available)	
Obverse: 1C_1884_O		Obverse: 1884_V10.jpg	
Reverse: 1C_1884_R		Reverse: 1884_V1R.jpg	
Denomination: 1 Cent		Clear Obverse Link	
Year: 1884		Clear Reverse Link	
Type/Reign: Victoria, Diadem, Large Leaves		Alternate	
Variety: Obverse 1, Large leaves			
Mint Mark:			

Previous Coin Next Coin Current Record: 2 of 4 Export... Nav List Save Cancel

Note that the list present is unfiltered. That is, any coin record that has a custom image association will be part of the list, sorted by denomination and year, without any type of search conditions to filter the list down (i.e. a range of years). If you need filtered lists of custom coin images, a Power Search would serve this purpose with a custom report profile to include the coin images.

Primary and Alternate Images

The comparison window will display the set of pre-supplied and custom obverse and reverse images for either the primary or alternate image sets. If an alternate image

set exists for the coin record, then a button will appear in the bottom right of the window labeled as either **Alternate** (to show the alternate image set) or **Primary** (to show the primary image set). The labels below the images will indicate if an alternate image set is available as shown in the example screen above.

Navigation of Coin Records

Use the next and previous buttons to cycle through the coin records. Hold down the CTRL key while clicking the previous or next buttons to move to the first or last records in the list respectively.

The 5 key coin attributes will be displayed for the current coin record, along with the total number of coin records at the current coin position in the list. The pre-supplied and custom image link file names will be displayed below the images.

Navigation List Assignment

The comparison utility will not allow editing of image links. If you wish to review or edit the image links for the purpose of changing the image file references, you can assign the coin list to the active EzCoin navigation list in the main window, and use the violet navigation arrow buttons in the main window toolbar along with the image link editor. Click on the **Nav List** button to assign the list and close the dialog window.

Resizable Image Preview

If you wish to view any of the images in a larger size, double click inside any of the 4 image panes to show a resizable image preview pane.

Main Window View

To select the current coin displayed from the list in the main EzCoin window, double click anywhere within the 5-key field label area and the dialog will close, with the coin record displayed in the main EzCoin window.

Clearing Links

There are 2 buttons on the right side of the window to clear the custom obverse or reverse image links. Once you clear a link, the file name link area will change to the text **<* REMOVED *>**. This will tag the coin record for link removal, but the change won't be saved at this time. All linked marked for removal will not be committed to the country file until you click on the **Save** button.

Note that clicking the clear button a second time will undo the change and restore the original link back.

Exporting Links

Once you choose to clear links and commit the changes via the Save button, the option to restore the original links is lost, unless you've made a country file backup. You can choose to export all of your custom image links to a tab-delimited text file

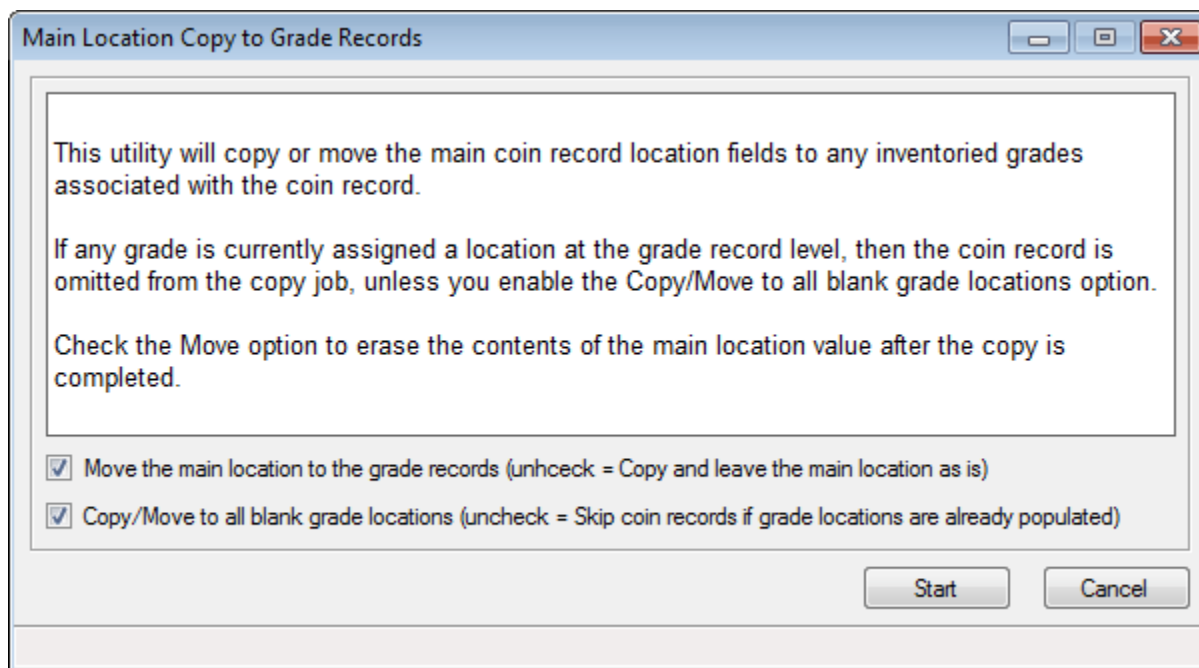
by clicking on the **Export** button. The 5 key fields along with the 4 custom image links (for primary and alternate images) will be saved to a UTF-8 tab-delimited text file. There is no import facility to restore the links back. You will need to manually enter links or restore from a backup file.

Saving Changes

Use the **Save** button to commit all cleared image links to the country file. Clearing an image link does not remove the image file itself - it will remain where it is located on your system.

Coin Location Copy Utility

This option is available from the Utility menu. It provides the facility to transfer the coin record's main location value to the individual grades. This feature is more of a support tool for users bringing in location data from version 1 of EzCoin.



The first checkbox option will move the primary coin location to the grade level and remove it once completed. If not checked, the main location value will remain as is and each inventoried grade will have a copy.

The second checkbox option is based on existing locations at the grade level. If a coin record has at least one grade with a location value, and this option is NOT checked, then the coin record is skipped over. For example:

- MS-65 has a location value
- VG-8 does NOT have a location.

If unchecked, the coin record is skipped. If the second option is checked, the main coin record location is copied to the VG-8 grade.

Any grades with an existing location value will never be overwritten.

Recalculating Country Totals

Under normal operating conditions, EzCoin will maintain totals (record counts, quantities and currency values) automatically for you. However, in case you notice that totals seem to be “off” in a report, you can easily rebuild the country totals information quickly using this option from the **Utility** menu. Unless an unexpected error occurred in a country file, the totals should not need to be recalculated.

Recalculating Grand Totals

Each country maintains totals information. EzCoin will also maintain a grand totals list for every country file you have opened and inventoried at least one record on. Normally, grand totals are built and maintained automatically. However, if you add or remove country files outside of EzCoin’s provided mechanisms to support this (i.e. copy a country .SDF file manually from Windows Explorer is not one of these mechanisms), you are bypassing the grand totals tracking capabilities in EzCoin.

The grand totals recalculation involves opening all country files you have installed, and extracting the country file’s individual totals information. As with country totals recalculations, you should never have to use this option unless you notice the grand totals are not matching the country totals when running a Grand Totals report.

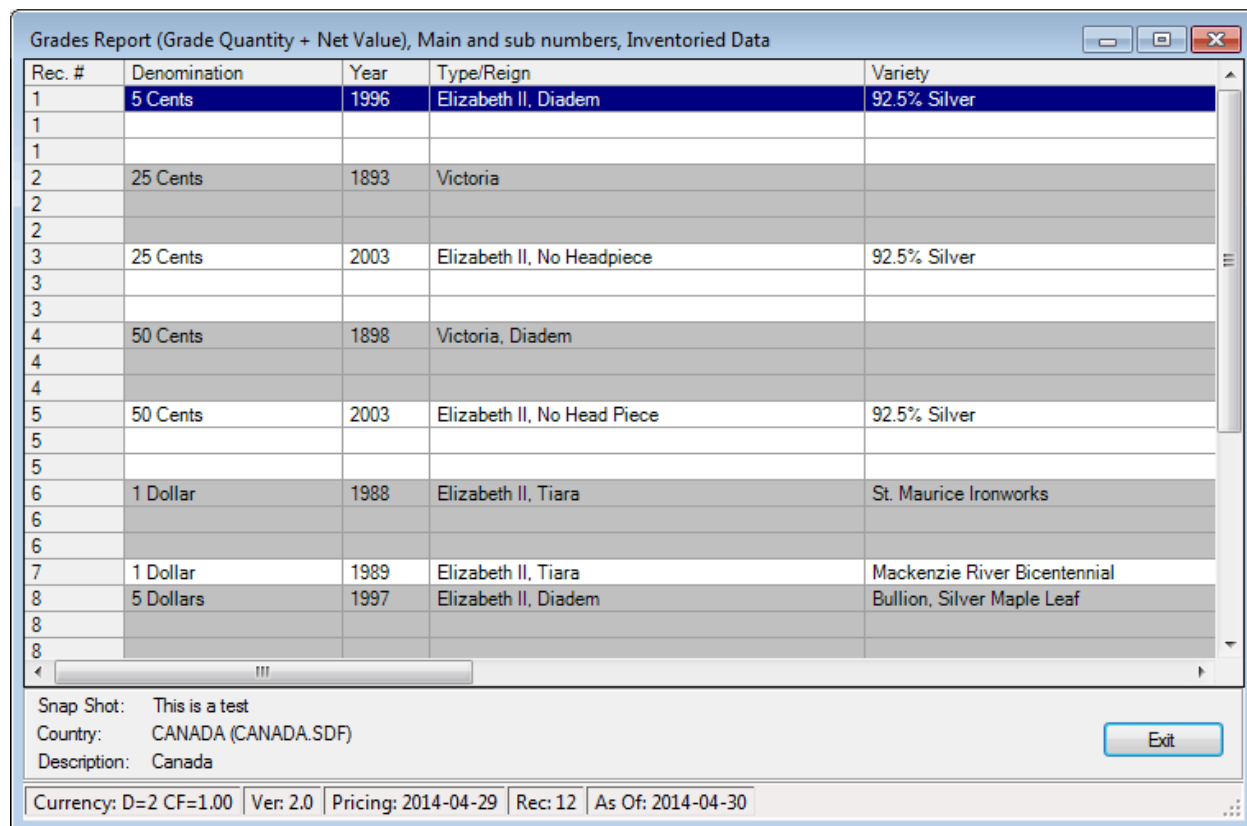
Recalculating Everything

This option basically performs a country totals recalculation for your entire set of installed country files, including a grand totals recalculation on each one. Only use this option if you notice report discrepancies on more than one country file for calculated values.

Snapshot Viewer

The report viewer in EzCoin provides an option to save all or part of the report records to a Snapshot file. These files have an extension of .SNP and by default are saved to the Snapshots folder within the EzCoin installation path.

The snapshot view is available from the **Extras** menu, and also as a freely distributable standalone application which can be downloaded from the EzCoin web site. An example of the viewer window is shown below.



Grades Report (Grade Quantity + Net Value), Main and sub numbers, Inventoried Data

Rec. #	Denomination	Year	Type/Reign	Variety
1	5 Cents	1996	Elizabeth II, Diadem	92.5% Silver
1				
1				
2	25 Cents	1893	Victoria	
2				
2				
3	25 Cents	2003	Elizabeth II, No Headpiece	92.5% Silver
3				
3				
4	50 Cents	1898	Victoria, Diadem	
4				
4				
5	50 Cents	2003	Elizabeth II, No Head Piece	92.5% Silver
5				
5				
6	1 Dollar	1988	Elizabeth II, Tiara	St. Maurice Ironworks
6				
6				
7	1 Dollar	1989	Elizabeth II, Tiara	Mackenzie River Bicentennial
8	5 Dollars	1997	Elizabeth II, Diadem	Bullion, Silver Maple Leaf
8				
8				

Snap Shot: This is a test
Country: CANADA (CANADA.SDF)
Description: Canada

Currency: D=2 CF=1.00 Ver: 2.0 Pricing: 2014-04-29 Rec: 12 As Of: 2014-04-30

The viewer provides a read-only copy of the report from which you saved to the snapshot file. The data grid and its contents are an exact copy of what you saw in the report viewer at the time of the save – there is no reference to a country file, as all of the information is contained in the snapshot file itself.

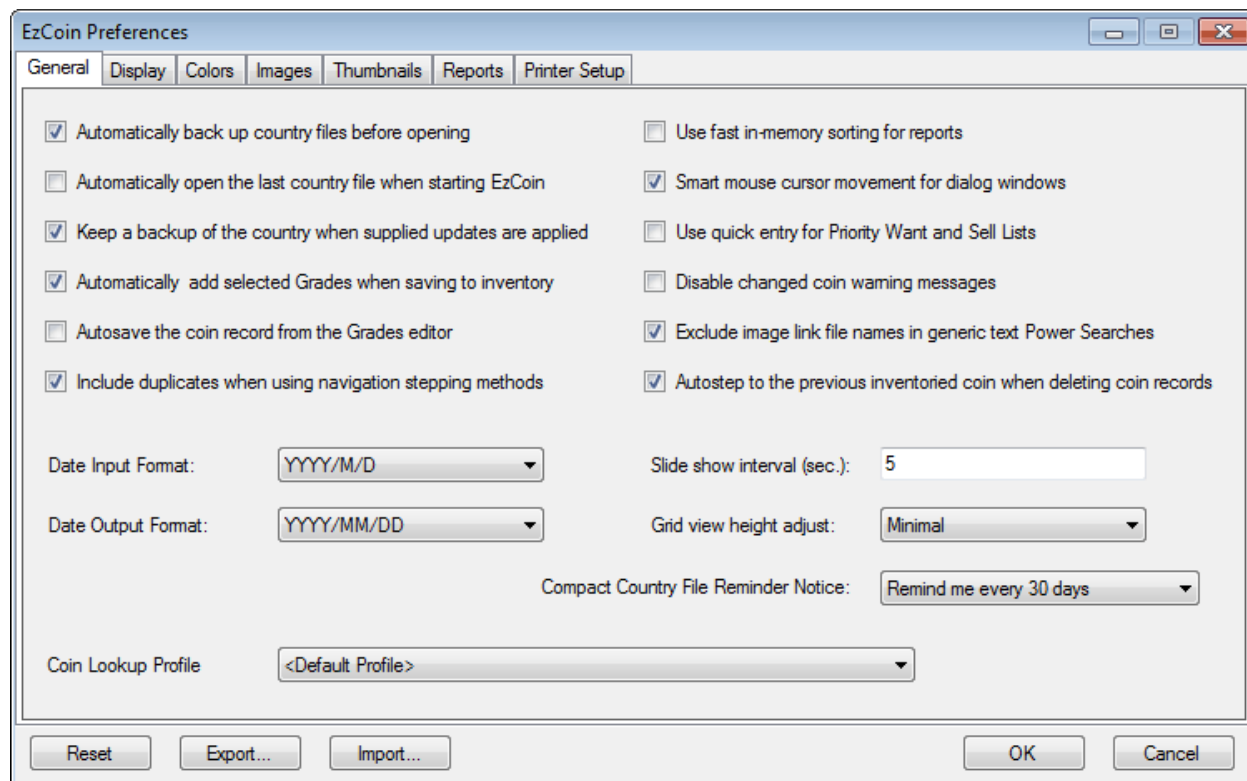
The bottom of the window contains some basic information (the standalone version contains an **Open** file button not shown in the integrated version), including the description of the snapshot file, country of origin (by name and description), and some basic country settings:

- Currency format (number of decimal places) and conversion rate (1.0 = USD)
- Version of the country file which contained the data

- Effective date of the last pricing and supplied data applied
- Number of records in the report
- When the snapshot file was created

EzCoin General Preferences

EzCoin stores most of the customizable options into a single preferences file, named **EzUser.cdt**, located in the installation path **Config** subfolder. For first time installations, this file will not be present, at which point EzCoin will assign a default configuration for the application. If you want to customize specific features in EzCoin, you can access the preferences configuration from the **Options** menu.



The preferences window is organized into tabs. Refer to the help topic for each tab for a summary of the configuration options on that tab.

Right Click/Ctrl Click Quick Help

You can right click any preference option to see popup help. Buttons within the dialog window also have popup help windows, but you must hold down the CTRL key while clicking a button for help.

Resetting Preferences

Click on the **Reset** button to initialize all preference options to default values which reflect a fresh installation of EzCoin. Your current settings are always saved to a file named EzCoin.cdt, located in the installation path. If you delete the CDT file from outside EzCoin and then run the application, the preferences will automatically be recreated using these default values.

Exporting Settings

Click on the **Export** button to save the current preference setting to a file of your choice. The file extension will be set as .CDT. You can restore the settings at any time using the **Import** button.

General Settings

Automatically back up country files before opening
Check this option to create a backup of the country (.SDF) file prior to opening it. You can use the Restore from Backup Files (Auto backup) utility to restore the previous backup. Only one level of restore is available and each time a country is opened, the previous auto backup is replaced.
Automatically open the last country file when starting EzCoin
Check this option to automatically open the most recently accessed country file when you start EzCoin.
Keep a backup of the country when supplied updates are applied
Check this option to retain a copy of the country file before applying pre-supplied pricing and data updates. Only one copy of the country file is retained, and will be replaced upon the next supplied update you apply.
Automatically add selected grades when saving to inventory
When inventorying a coin record, this option allows you to auto-commit selected grades at the same time, avoiding the need to click on the Add Selected Grades button first.
Autosave the coin record from grade/custom field editors
When using the quick edit (spreadsheet) or single grade edit options from the main EzCoin window, changes are not updated to the country file when you apply them within the editor dialog windows by default. Check this option to force an auto-save of the coin record when applying the edits from within these 3 edit dialogs. If the coin was not inventoried at the time of the auto-save, it will become part of your collection.
Step to previous supplied on inventory deletions
Check this option to automatically recall the previous supplied coin record (by Scott #) when removing the current coin from inventory.
Include duplicates when using navigation stepping methods
If this option is checked, then duplicate coin records will count when stepping forwards and backwards using the navigation arrow buttons (green, blue and violet) in the main EzCoin screen. With this option disabled, you will need to use the smaller arrow buttons in the bottom status bar to step between duplicate coins.
Include duplicate coins in the key field search results window
When searching for coin records from the main EzCoin window based on the 5 key fields (Denomination, Year, Type/Reign, Variety, Mint Mark), with less than all 5 fields filled in, and start a search with multiple matching coin records, a report view will be presented with all matches. Use this option to control if duplicate coin records will be displayed or suppressed.
The Clear Fields button behavior will mimic EzCoin version 1
The clear fields button in the main EzCoin screen functions different from version 1 of the

application, in that you must hold Ctrl down to clear all fields on the main screen. If you wish to use the version 1 behavior, then enable this checkbox. Holding down Ctrl in this mode will clear user fields, without Ctrl the entire screen.
Use faster in-memory method to sort reports
By default, EzCoin will sort reports using a file-based method, which is slower, but consumes less memory. If you check this option, all reports will be sorted using your PC's memory instead, which is significantly faster. If you are using an older PC with limited memory capacity, it's recommended to leave this option unchecked.
Slide show interval (sec.)
When presenting a slide show of coin records using the Navigation List feature of EzCoin, this value controls the delay between showing each coin record. The value is in seconds.
Smart mouse cursor movement for dialog windows
Check this option to enable smart mouse cursor movement when navigating between the various windows in EzCoin. The choice of the default "hot spot" for the cursor movement in each window is pre-determined and can't be changed. This option will not work on windows which are outside the EzCoin application, such as a file open dialog.
Use quick entry for Priority Want and Sell Lists
Check this option to use quick entry for Adding and Removing grades to and from the Priority Want/Sell Lists. With this option disabled, you will always be presented with a dialog window to allow for specific grade, quantity and type options.
Disable changed coin warning messages
There are many operations within EzCoin which could result in temporary changes (on the main EzCoin window) being lost if you didn't save them to your inventory beforehand. This option controls the display of the warning dialog which allows you to back out before performing such an operation. If you check this option, no change warning dialogs will appear.
Exclude image link file names in generic text Power Searches
Power Searches have the ability to match your text-based search values against every text field associated with a coin record, including the image link file names. This may cause unwanted matches when searching for basic text information such as PCGS # or Denomination. To avoid hitting an image link on a Power Search, check this option.
Compact Country File Reminder Notice
Over a period of time, additions, deletions, changes and pre-supplied data updates to your country files can cause them to grow in size due to data fragmentation, much like the hard disk on your PC. EzCoin has a built in monitor on each country file to detect when a certain amount of time has elapsed before reminding you to compact your country file to reclaim space and make the file as small as possible. You can change the interval on the reminder period or disable it altogether. If disabled, you can choose to compact the country files at any time using the Compact Country utility.
Grid view height adjust
There are many windows in EzCoin which make use of data grids (aka spread sheet views) to display information in rows and columns format. This setting can be used to increase or decrease the height of the data rows based on a percentage adjustment of the

default row height.
Date Input and Output Formats
EzCoin displays dates using a pre-defined pattern for the day, month, and year values. It also uses a second pre-defined pattern for any input field where a date is expected. You select the patterns to use from the available values in the drop down lists. Note that the Date Output value can be used as a valid format for entering dates, as can any date which is currently in the format defined by the Date/Time settings for your PC.
Coin Lookup Profile
When searching for coins in the main EzCoin window a report view will be displayed when multiple records are detected for the given input (i.e. you press ENTER in the Denomination field which has 1 Cent display and the other 4 key fields are all empty). This drop down list allows you to assign a custom profile for the report view. Note that you MUST make a copy of the profile named Coin Lookup List and customize the a copy to have it appear in the drop down list.

Display Options

Show different colors for supplied and inventoried coin fields
Check this option to show a different background and text color for fields on the main EzCoin window where pre-supplied values are different from the inventoried values. To set the colors, change the Difference Color values under the Colors tab in the Preferences window.
Use country file-specific labels for Cat IDs, Serial # and Location
Check this option to use country-specific labels for the Serial #, Location, and alternate catalog ID field names. This setting affects the main window labels, the Report Viewer and printed reports.
EzCoin main tabs and quick editors will use the same sort order
Check this option to ensure that the quick editors for grade, purchase/sell history and priority/want sell/list data retain the same order in the editor grid as in the main EzCoin window's tabbed grid views.
Show PWL in main tab list
Check this option to add a grid to the tab list of the main EzCoin window for the Priority Want list.
Show PSL in main tab list
Check this option to add a grid to the tab list of the main EzCoin window for the Priority Sell list.
Show custom fields in main tab list
Check this option to add a grid to the tab list of the main EzCoin window for the Custom fields for the current country.
Disable automatic tooltip text for Report, Coin List and Snap views
Check this option to disable the automatic tooltip text which shows when you hover the mouse over cells in the following data grids: Report Viewer, Snapshot Viewer, and Coin List Viewer. You will need to restart the application for this change to take effect.
Display the notes and comments in the left details panel
EzCoin by default will place the pre-supplied Notes and User-supplied comments data below the coin images in the main window. This makes optimal use of the available space when used on monitors with less than high-res (under 1920 x 1080 pixels) capabilities.

For higher resolutions with a larger EzCoin main window size, you can place the notes and comments under the designer field in the left information panel, allowing the coin image area to increase considerably. Note that resetting the EzCoin main window size will turn off this option by default.
Drop down lists for Locations and other items always sort alphabetically
Check this option to automatically sort lists alphabetically in drop down list controls in EzCoin. If unchecked, the list sort order must be maintained manually as new items are added with new coin updates, using the Lists Editor utility (the latter mode reflects the standard behavior in EzCoin version 1). This option applies to lists for Locations, Graders, Purchased From, Sold To, and Priority Want/Sell List Types.
Show high currency values in a different color on report views
Check this option to show a different background and text color in the Report Viewer window whenever a currency value exceeds the minimum amount shown in the Minimum High Currency field. To set the colors, change the High Value Color values under the Colors tab in the Preferences window.
Text Box, Drop Down List, and Data Grid Fonts
You can define any font in an 8 or 9 point size to use for the text box fields, drop down lists or data grid views appearing in any EzCoin window. This will affect only EzCoin dialog windows – it will not be applied to any other application, as these are not Windows settings.

Colors

Grid Odd Rows
For on-screen grids and the report viewer, these are the text and background colors for rows 1, 3, 5, etc.
Grid Even Rows
For on-screen grids and the report viewer, these are the text and background colors for rows 2, 4, 6, etc.
Grid Header
For on-screen grids and the report viewer, these are the text and background colors for the header caption labels for each column of the spread sheet.
Grid Highlight
For on-screen grids and the report viewer, these are the text and background colors for data rows which are currently selected.
Grid Cursor
For on-screen grids and the report viewer, these are the text and background colors for selected cells. This color combination only appears for grids which allow individual cells to be selected.
Grid Non-Editable
For on-screen grids used by various edit windows, these are the text and background colors for cells which can't be edited (aka read only).
Grid Marked
For the grades quick editor and the report viewer, these are the text and background colors for data rows which are marked for changes or bookmarked in the viewer.
Help Hint Windows
For the Quick Help message windows, you can set custom text and background colors.

You can't change the font type or font size for help hints.
Difference Color
You can indicate changes between pre-supplied data values and your inventoried values of the same fields using special text/background colors, which are applied to the main EzCoin window and the report viewer.
You will also need to enable the appropriate preference/report option to display these colors.
High Value Color
You can enable high currency value color coding in the report viewer by enabling the preference option and setting a minimum currency value for which these colors will be displayed.
Inventoried Record
These colors are used to mark inventoried records in the report viewer. The color coding is applied to the record number column (left most) in the report view grid.
Grid Lines
This color is applied to all grid lines used for on-screen spread sheet views.
Main Image Background:
This color is used as the background color for the main EzCoin image area.
Viewer Image Background:
This color is used as the background color for the report and coin list viewer image areas.

Image Options

Clipboard Save Format
EzCoin allows you to use the image links editor to paste in a coin image from the Windows clipboard. This option determines what format will be used to save the clipboard image as a file.
Image Quality
For displayed images, this option controls the image rendering quality. If you are running EzCoin on a slow PC, you may want to use a lower quality setting.
Note that printed reports use an independent image quality setting defined in each report's profile.
Allow images to expand beyond 100% actual size
This option controls if images displayed on screen will be expanded to larger than 100% size to fit the available image window area.
Do not search the EzCoin distribution disc drive for image files
Check this option to disable checking the CD/DVD/BD drive from which EzCoin was installed from for image files, if they can't be located in other locations (i.e. the hard disk image copy path) first.
Alternate Images Location
EzCoin allows you to specify an alternate image path which can be used separately from the hard drive image copy path. Use this option if you wish to keep your image repository separate from the EzCoin installation location.
By default, EzCoin will reference your images from within the Images subfolder of the EzCoin application installation path.
EzCoin CD/DVD/BD Drive

When EzCoin is installed, the CD/DVD/BD drive which was used has the path name automatically saved. The path setting is based on the user who installed EzCoin. If you have multiple users logging into your PC, or you wish to reference images from a drive other than the one which was used to install EzCoin, you must manually change the drive location here. Use the ellipsis button to browse to a new location.
Alternate Image Location Preference
When this option is checked, EzCoin will search your preferred alternate image folder first for coin image files. When this option is not checked, EzCoin will search under the application installation path first.
Do not show primary images when the alternate obverse/reverse image isn't available
By default when showing alternate images in EzCoin, if the obverse or reverse image isn't available, the primary version of that image will be shown instead. Use this option to disable this behavior. If an alternate image isn't available, the primary image will not be displayed.

Selection Rectangle Transparency:
When selecting coin images in the thumbnail viewer, a rectangle will outline the selected coin. This option allows you to set the transparency level. A higher value will allow more of the image underneath the selection rectangle to appear.
Viewer Background Color
This color is used as the backdrop for all coin images in the thumbnail viewer.
Grid Line Color
This color is used to draw the gridlines between the coin rows and columns in the thumbnail viewer.
Selection Rectangle Color
This color is used to draw the rectangle around the current coin selected in the thumbnail viewer.
Label Color (Supplied)
Pre-supplied coins which are not part of your inventory will show the Denomination & Year with this background color.
Label Color (Inventoried)
Coins which you have inventoried based on pre-supplied data will show the Denomination & Year with this background color.
Label Color (Custom)
Coins which you have inventoried which have no pre-supplied data will show the Denomination & Year with this background color.
Number of Rows
This value determines how many rows of images will be displayed in the thumbnail viewer. Note that you can drag the viewer to be larger or smaller, but the number of rows will not change.
Number of Columns
This value determines how many columns of images will be displayed in the thumbnail viewer. Note that you can drag the viewer to be larger or smaller, but the number of

columns will not change.
Label Text Color
This color is used for the Denomination & Year text below each coin image in the viewer.
Image Quality
Thumbnail image quality can be defined using this drop down list. If you are running EzCoin on an old PC with limited performance, use a lower quality setting, or reduce the number of rows and columns to display.
Label Font
You can change the font to be used for the Denomination & Year displayed below each image. Left click the font name to change the current setting.
Image to Show
The thumbnail viewer can only show primary or alternate images at one time. This drop down prioritizes which set of images are displayed. If the coin record doesn't have an available image based on your choice, the primary image will be substituted automatically.
Allow images to expand beyond 100% actual size
Check this option to allow images to exceed 100% of their actual size. In this case the image will grow to fit within the boundaries of each image cell in the viewer.
Show grid lines between image rows and columns
You can hide grid lines between coin images in the viewer by un-checking this option.

Report Viewer Options

Image Quality
The report viewer image quality can be defined using this drop down list. If you are running EzCoin on a slow PC, use a lower quality setting.
Image Background
When displaying in image column in the report viewer, this option is used to define the background color.
Image Size
When displaying an image column in the report viewer, this option is used to define how large the image cell will be. The columns of text data will be adjusted to match this height.
Suppress Zero Override
This option controls how the report viewer will display zero quantity and zero currency values. The default is to let the report profile (which has its own suppression setting) handle this. You can globally override the report profile at any time by using this option to always suppress or always show zero values.
Display the alternate Catalog ID column on reports
Check this option to globally enable the current alternate catalog ID value (as shown in the main EzCoin window) on all reports. Note that if you have added alternate catalog ID values explicitly into the field profile for a report, this option will have no effect on that particular report.
Display the duplicate sequence # column on reports
Check this option to show the duplication number on all reports. For example, a coin which has been duplicated 2 times can show as 3 rows on the report viewer. This column allows you to see the duplication number on the report. If a report profile has been defined with the duplication field already, this option will have no effect.

Pressing ENTER in the report view selects the coin and exits
Check this option to enable an EzCoin Version 1 feature. When enabled, selecting a coin record in any report view, then pressing the ENTER key, while navigating the data grid cells with the cursors keys, will result in the selected coin record being displayed in the main EzCoin window, and the report dialog window closing.
Enable search match columns on reports
Enable this option to show all matching columns from a Power Search. For example, if you matched on Denomination and it wasn't in the field profile for a report, it will automatically be added to the right side of the column set.
Image Caching
The report viewer can speed up the display of reports which contain image columns by caching the images as smaller thumbnails on your hard disk. Use the Clear Cache button to flush out the file list from your PC. If you want to have the cache auto-cleared when exiting EzCoin, enable the Clear Cache on Exit option. Note that if you change the size of the image cells, you will need to clear the cache or the previous sized images will be used.
Use short column names on report views
The report viewer can use either the Long or Short display names for column header captions. The short format will reduced the amount of horizontal scrolling needed to view the report data.
Group Header Colors
If you include field data groups (Purchase/Sell History, Grades, Priority Want/Sell List) in a report profile, the header labels can be shown with different background colors, to better distinguish normal primary coin information from the secondary data group columns.

Printer Settings

Printer Selection
Each report profile can have a specific printer assigned to it. The general preference option allows you to have a master default printer assigned for every report, regardless of each report's individual settings. Note: if you add or remove printers after EzCoin has been installed, you may need to refresh the printer list. For performance reasons related to some network-based printer configurations, EzCoin only builds a list of printers on demand. Use the Refresh Printers button to update the list. If you don't select a printer, EzCoin will use the default printer assigned on your PC.
Paper Size
You can set a global paper size to be applied to all reports. If you don't set a global paper size, the report will use the default paper size for the selected printer.
Orientation
The Default option will use the current paper orientation of the current printer. Use the other two options to enforce a specific page orientation for all reports.
Apply this orientation, margins, paper and printer to all reports
Check this option to enable global Printer, Paper Size, Orientation and Margin settings, which are basically the values you choose in the preferences window. If the option is not

checked, the report profile's internal printer settings will be used instead.
The global setting is recommended if you intend to output the report using the same printer and paper size consistently regardless of the report type.
Margins
Global margins can be assigned for reports using these values. The header and footer are based on the top and margins, and occupy space which is deducted from those margins.
Margins must be entered in units of inches.
Autosize all column widths for Multi Page Reports
For a report type defined as multiple pages, this option will automatically adjust the widths for any columns which aren't defined as multi-line format. A multi-line format column will still be restricted to the width defined in Master Report Fields list.
Adjust Fit to 1 Page Reports to fill the page width
For any report which only occupies a single physical page width, this option is used to proportionally enlarge each column's width so that the grid size fully occupies the page between the left and right margins.
Refreshing Printers
EzCoin only creates a printer list when you install the application. If you add or remove printers after this time, you will need to refresh the available list of printers. This button performs this task and is identical to the Refresh Printers option in the main EzCoin menu.

Customizations

EzCoin provides several options to customize your copy of EzCoin. All of these customizations are located under the **Options** menu.

Precious Metal Prices

Coins valuations are normally based on the market value and grade. However, coins can contain precious metal content, and EzCoin will always maintain a bullion value for the coin, regardless of the grade. The coin's net bullion value is the grade quantity multiplied by the calculated bullion value.

The calculated bullion value requires more than 0 percent content for any of the following metal types: Gold, Silver, Platinum or Palladium. Unlike EzCoin version 1, the precious metal content percentages are maintained in separate fields.

When importing data from version 1, the composition field is scanned for precious metal percentages, based on the same process used to assess bullion value coins in version 1.

A coin must have a valid weight assigned to it as well, which can be in any of the pre-defined units of weight.

A bullion value is the weight of the coin, multiplied by its current precious metal price and it's percentage of metal content, for each of the 4 metal types.

As bullion valued coins are part of the net value for the coin collection in each country, the current precious metal values are saved within each country's data file. EzCoin will also maintain a global metal price. This pricing update window is accessed from the **Precious Metal Prices** item in the **Options** menu.

Your Prices			SoftPro Prices	
	Price	As Of	Price	As Of
Silver	\$19.45	2014-04-30	\$19.45	2014-04-30
Gold	1344.10	2014-07-27	\$1,295.42	2014-04-30
Platinum	\$1,424.00	2014-04-30	\$1,424.00	2014-04-30
Palladium	\$802.00	2014-04-30	\$802.00	2014-04-30

Web Links for Prices: ☐ Your Links ☒ SoftPro Links

http://bullion.nwtmint.com/pricing.php?gclid=CM2H-p_DwqECFQENDQ [Visit](#)
<http://www.kitco.com/market/> [Visit](#)
<http://www.thebulliondesk.com/> [Visit](#)

There are 2 sets of prices saved with EzCoin. The left side prices you are free to maintain on your own independent of any data updates from SoftPro.

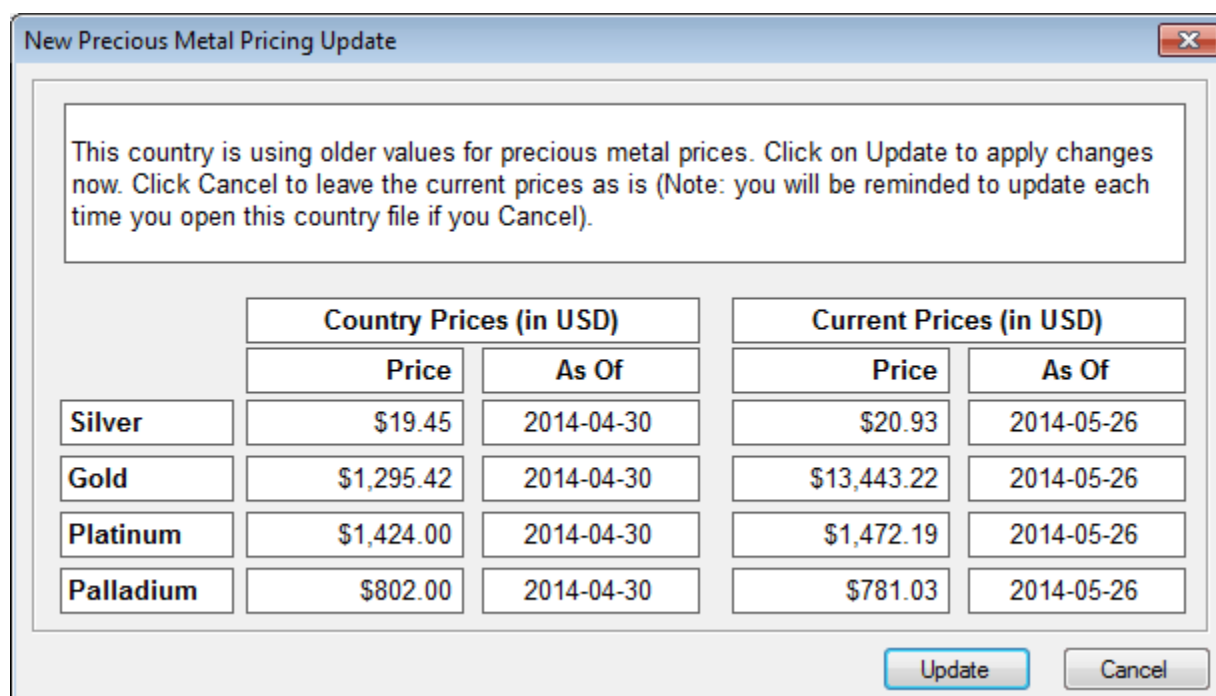
The right side prices come from Free Updates from SoftPro. If you want to get the latest prices from an online Web site, you can Visit the Web Links shown. SoftPro provides 3 current links for pricing, and you can add 3 of your own, using the **Your Links** radio button.

The price values are always expressed in U.S. Dollars (USD) currency. When working with country files using a different currency rate, EzCoin will automatically calculate the bullion values based on the currency rate for the country.

As you change prices the As Of date will update accordingly. Free updates from SoftPro may also update the As Of dates in the right side prices.

Use the **Update Links Only** button to apply any changes you make to any of the 3 custom Web Link URL values. Otherwise, click Apply to save Web Link changes AND price changes.

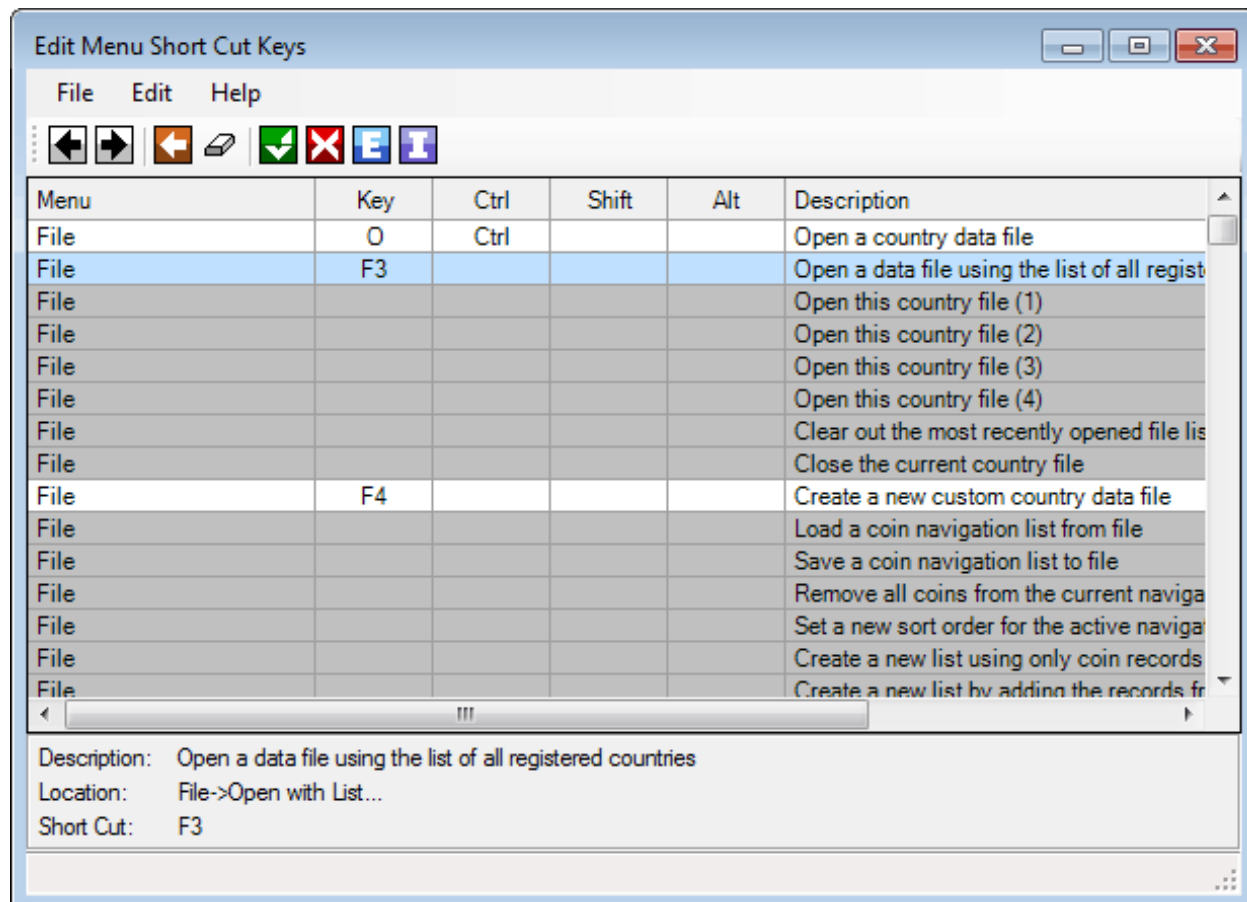
When you update the global pricing, EzCoin will check the country pricing when you next open the country file. If the precious metal pricing has changed, you will be given a confirmation window to apply the new pricing values.



Click Update to apply the prices changes to the country file. If you click Cancel, you will be prompted again the next time you open the country file. Note that if you currently have a country file open when you change a precious metal price, the information will automatically be updated to the country file.

Keyboard Shortcuts

EzCoin defines a handful of default shortcut keys for the main EzCoin menu. You are free to redefine the keyboard shortcut mappings for EzCoin using the **Keyboard Shortcut Configuration** option under the **Options** menu.



The shortcut list contains all of the items in the main EzCoin menu, grouped by the primary name in the menu bar. If a shortcut is assigned, the item will be highlighted in a different color to indicate this. Shortcuts can consist of a combination of the key on the keyboard and qualifiers, which are the CTRL, SHIFT, and ALT keys. Not every keyboard combination is valid for a shortcut. For example unqualified letters and digits are not allowed, as are keys reserved by Windows.

Toolbar Options



1.	Removes a shortcut from the selected item. You can also Right click the item to remove shortcuts.
2.	Assign or change a shortcut key. This option will bring up a small dialog window, prompting you to enter a valid shortcut. If the shortcut is already in use, a warning will be given – duplicate shortcut keys are not allowed. To cancel, you must click the small X in the caption bar of the window. Note: You can double click any shortcut item in the list to assign a shortcut key.
3.	Undo all changes you have made.
4.	Erase all keyboard shortcuts.
5.	Save keyboard changes.
6.	Cancel all changes and close the editor.
7.	Click the export button to save the keyboard shortcuts to a file. Keyboard shortcut files are saved with an extension of .EKM. Use the import button to recall saved shortcuts from a file.

Reverting to Pre-supplied Shortcuts

Use the **Revert** option in the File menu to change the shortcut mappings to the default pre-supplied settings.

Menu Shortcut Buttons

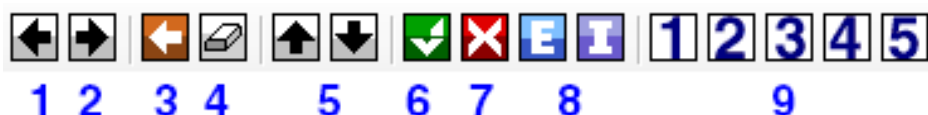
EzCoin's main toolbar provides a basic set of buttons for the more frequently used options. If you find using shortcut keys or menu navigation cumbersome and prefer to have icons to click on to perform the equivalent menu actions, you can attach most menu items to shortcut buttons which will appear as a secondary window you can position alongside the main EzCoin window.

The editor is accessible from the **Shortcut Buttons Configuration** item under the **Options** menu. The shortcut button window is displayed or hidden using the **Command Shortcuts** option under the **View** menu.



The edit window shows available menu commands in the left side list and assigned commands on the right side list. Up to 5 sets of shortcut buttons can be configured. The current set of buttons is shown in the title bar (Set 1 to 5). The bottom area of the edit window shows the selected item's description, location in the EzCoin menu, and any shortcut key attached to it.

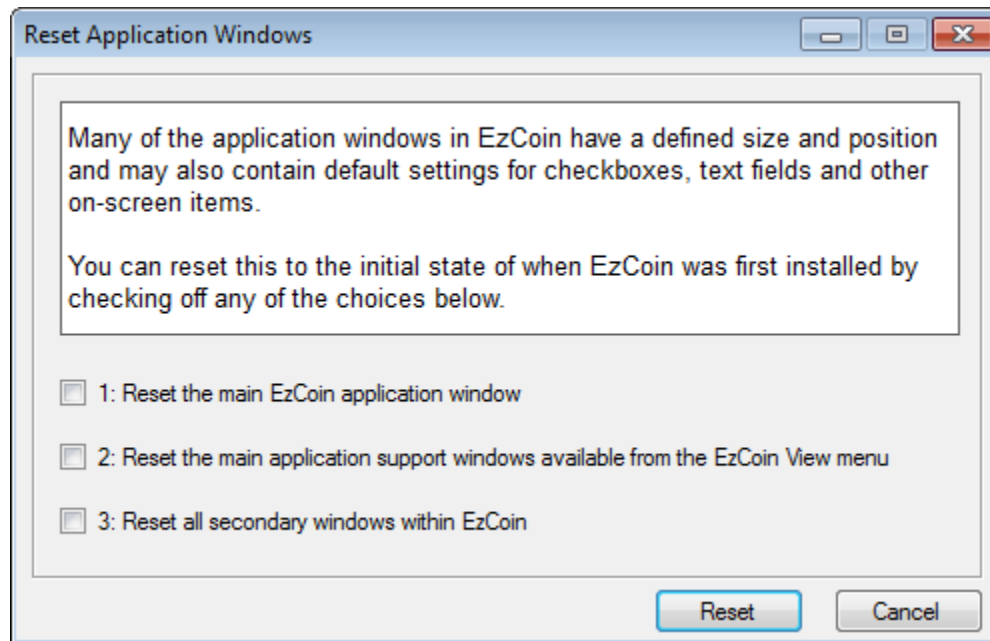
Toolbar Options



1.	Removes the selected assigned items from the right side list. You can also Right click the selection on the right side list to remove them.
2.	Assign selected items from the available list in the left side list to the assigned items in the right side list. You can also right click the selection in the left side list to assign them.
3.	Undo all changes you have made.
4.	Erase all button assignments in the right side list for the current set.
5.	Move the selected items in the right side list up or down. Topmost items will be the first ones visible in the shortcut window. Hold down CTRL while clicking to move the selection to the top or bottom of the assigned list.
6.	Save shortcut changes for all 5 sets.
7.	Cancel all changes and close the editor.
8.	Click the export button to save the button shortcuts to a file. Button shortcut files are saved with an extension of .ECF. Use the import button to recall saved shortcuts from file. Note: The import and export options work with the current set (1-5). If you export while working within set #2, then only set #2's shortcuts are exported.
9.	These buttons change the current command set. The assigned and available lists will automatically be adjusted when you click on one of these buttons.

Resetting EzCoin Application Windows

This option is available as **Reset Application Windows** under the **Options** menu.



As indicated in the dialog notes above, nearly every window in EzCoin has some type of configuration element, such as a checkbox state, text field value, or the size and position of the window on your screen. This information is stored in special window configuration files in the CFG folder of the EzCoin installation path.

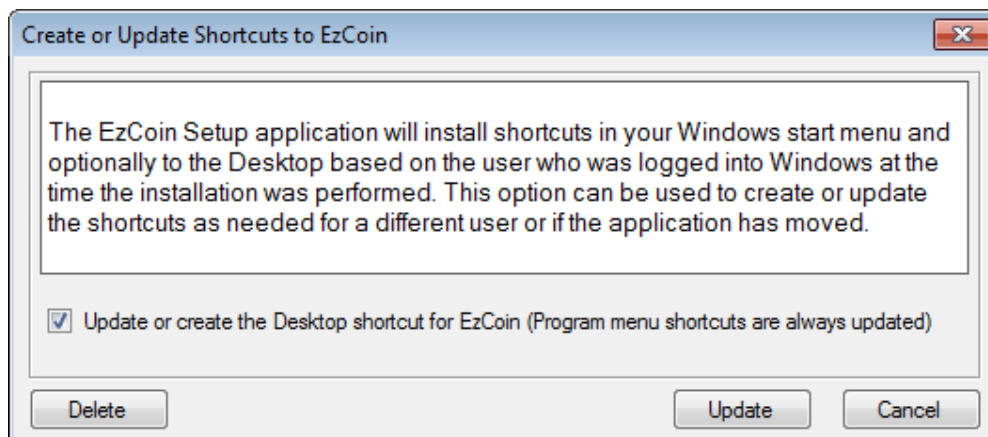
The reset dialog provides only 3 checkbox options. This is based on the 3 main window types in EzCoin:

- The primary window for EzCoin.
- Supporting windows which can be positioned alongside the primary window, such as the Thumbnail Viewer or the Coin List. These windows are displayed or hidden using items under the **View** menu.
- Secondary windows, which is basically every other window in EzCoin.

Resetting a window removes all customizations and settings on the windows, including their current size and position (if applicable). The window states will return to what they were when EzCoin was first installed.

Application Shortcut Links

The **Create Shortcuts** item under the **Options** menu will allow you to create or update the shortcuts to the EzCoin application on the desktop and program start menu. The shortcuts will also include updates to the help files and the EzUpdate application.



In order to avoid any issues with UAC (User Access Control) under Windows Vista/Windows 7/Windows 8, EzCoin will not try and access any restricted areas of your Windows installation which would otherwise require Administrator rights or UAC permissions. Shortcuts to the desktop and program start menu are created by the EzSetup application with ownership set to the user who runs EzSetup.

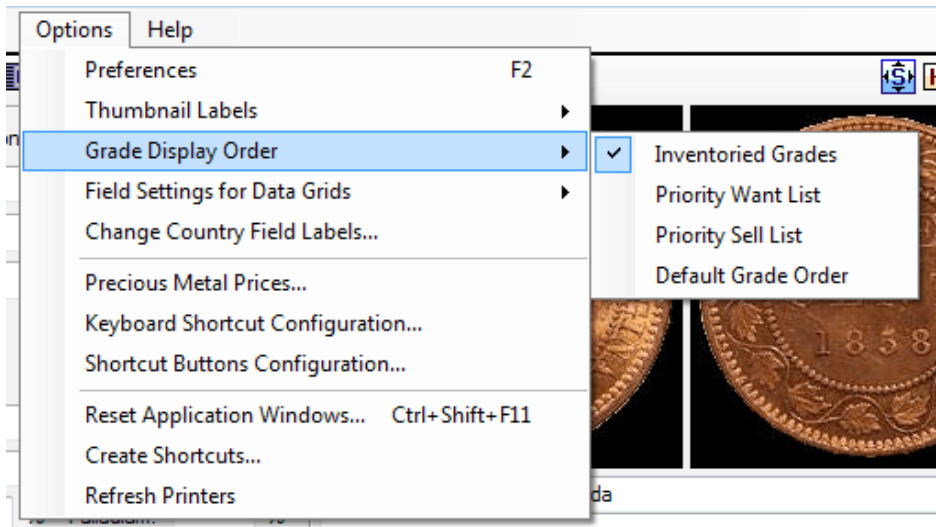
If you run Windows under a different user, the shortcut links will need to be updated for the new user. This dialog will perform that task.

In addition, if you elect to copy EzCoin from one location to another, you can easily re-point the shortcut links to the new location.

The checkbox option is for updating the Desktop shortcuts. If you don't check this option, then shortcuts are only updated to the program start menu.

Setting the Grade Data Display Order

The **Grade Display Order** submenu under the **Options** menu allows you to control how grades are sorted in the Grades tab of the main EzCoin window.



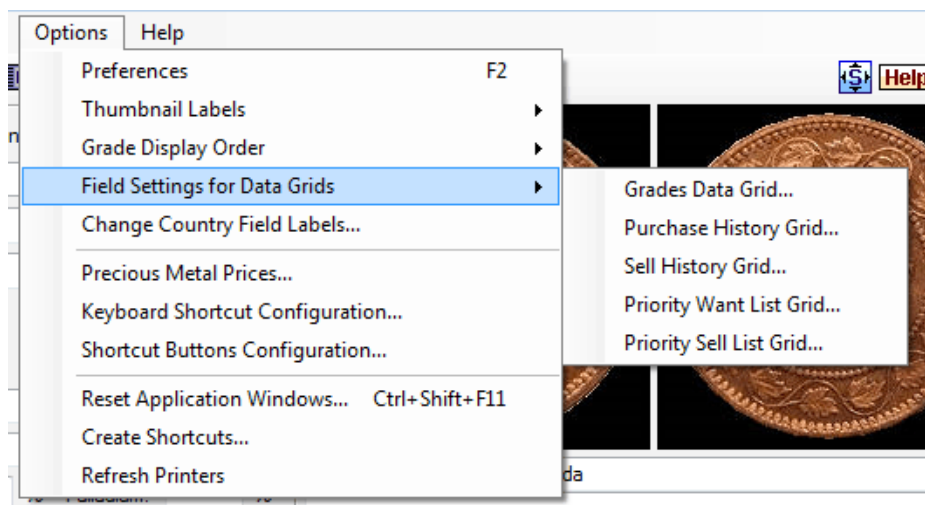
There are 4 options in this submenu.

Inventoried Grades	This sort order (the default one) will always prioritize the inventoried grades to come first.
Priority Want List	Priority Want List grades will be sorted first.
Priority Sell List	Priority Sell List grades will be sorted first.
Default Grade Order	The grades will always retain the default order as defined in the Grades Configuration editor.

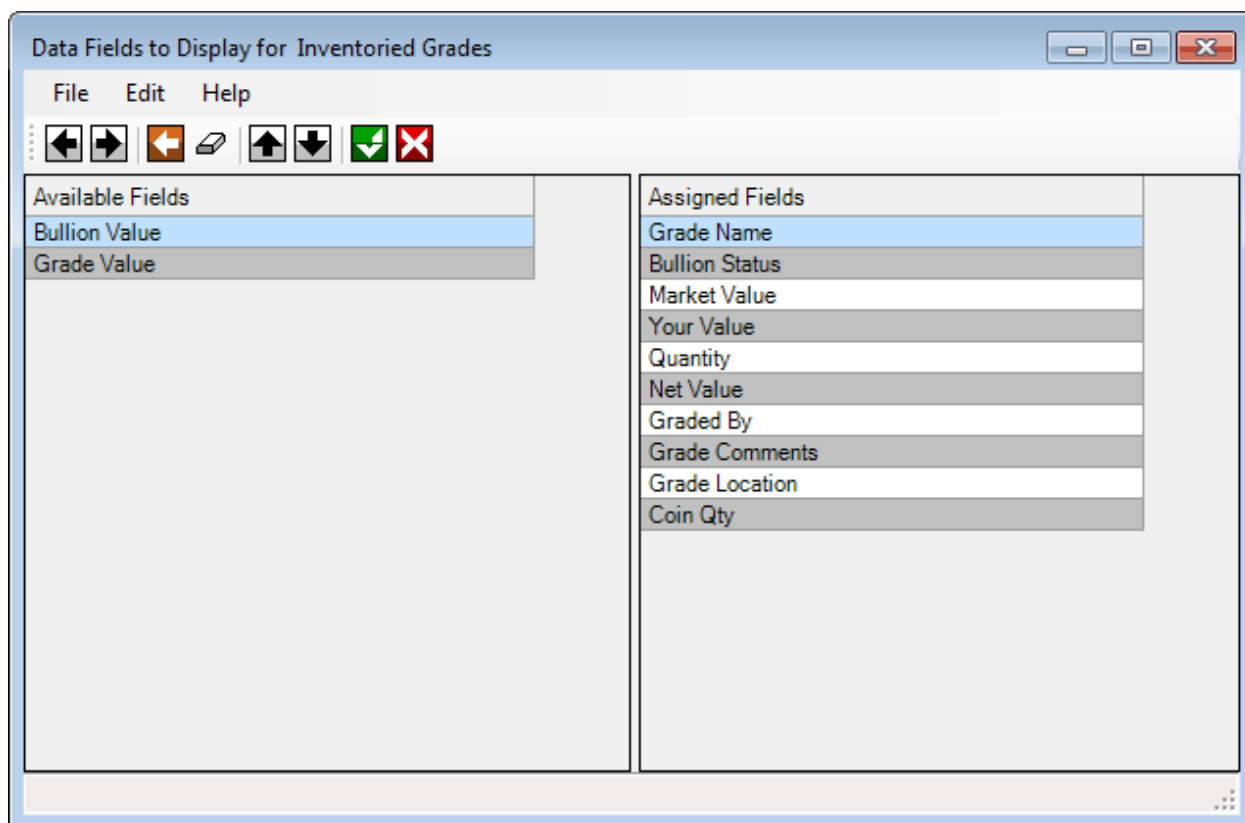
In addition to these 4 sort orders, you can click any column in the grades data grid to sort the data in ascending or descending order.

Setting the Fields to Display in the Tabbed Grid Area

For the 5 data grids in the main EzCoin window, you can choose which fields you want to display, and in custom left to right ordering, using the **Field Settings for Data Grids** submenu under **Options**.



NOTE: This dialog window is also used to set the fields to display for report profile which contain data groups for these 5 types of coin information.



The left side list is the available fields to show in the data grid. The right side list is the assigned fields. The top to bottom ordering in this list corresponds to the left to right ordering of these fields in the main EzCoin window data grids.

Toolbar Options



1.	Removes the selected fields from the right side list. You can also Right click the selection on the right side list to remove them.
2.	Assign selected items from the available list in the left side list to the right side list. You can also right click the selection in the left side list to assign them.
3.	Undo all changes you have made.
4.	Erase all field assignments in the right side list. You can't save an empty list, so at least one field must be assigned. Use the Reset menu option to restore the assignment list back to the default fields.
5.	Move the selected items in the right side list up or down. Hold down CTRL while clicking to move the selection to the top or bottom of the assigned list.
6.	Save the filtered field list. The main EzCoin data grid will update accordingly.
7.	Cancel all changes and close the editor.

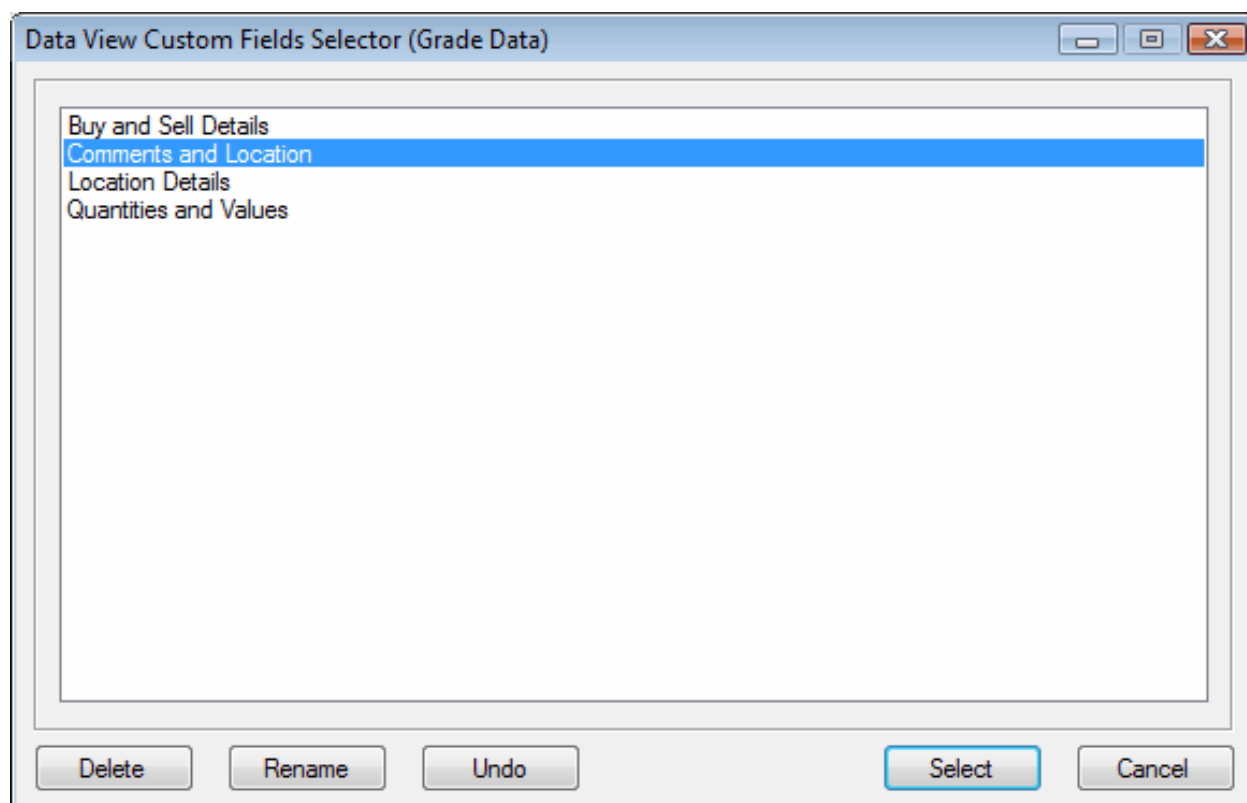
Custom Grid Field Display Files

A **Save Custom File** option is provided for the Grades data grid only, to save the current assigned fields to a customization file in the **User** folder of the application. The customization files represent temporary field settings for the main window data grid. When you close down EzCoin and restart the application, your default field settings will be applied. Custom field files are a quick way to change the fields in the EzCoin grades grid without having to generate a new default field list each time you want to hide or show fields in the grid.

This option is available from the **File** menu. When you select it, you will be prompted for a description, which will also be used for the name of the file. The extension of .fgrd is applied to the file for you automatically.

Choosing a Customized Field Display File

Switching to a new set of fields to display in the main EzCoin grades grid is simple: right click anywhere in the data grid area, and choose the **Select Custom Field List** option from the pop-up menu. This will present a simple dialog window with a list of custom field files which were saved.



You can select any field settings file in the list then click **Select** to use that file. You can also Double-click the item in the list to select the file and close the dialog window at the same time.

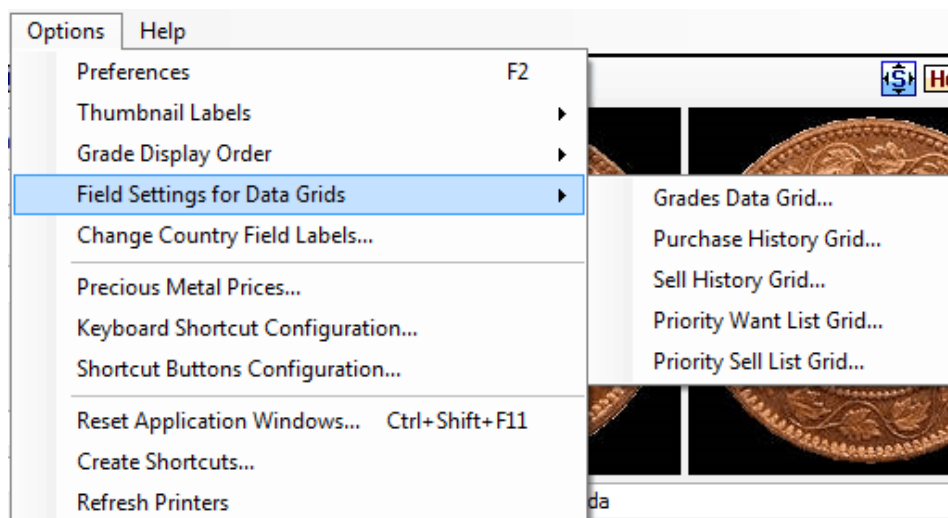
To delete a settings file, select it then click on the **Delete** button.

To rename a settings file to a different name, click on the **Rename** button.

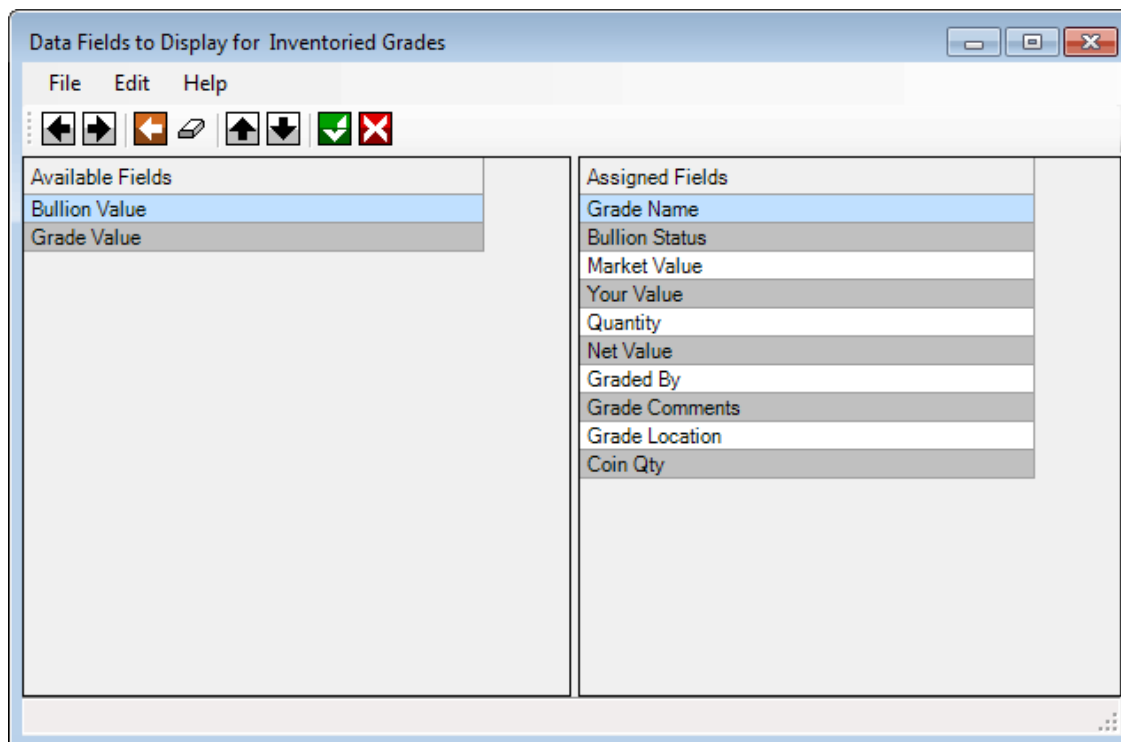
To undo any custom field display setting in the EzCoin main window and restore the fields to the default set, click on the **Undo** button. Keep in mind that custom field settings are not retained once you close the EzCoin application.

Setting the Fields to Display in the Tabbed Grid Area

For Grades, Priority Want/Sell List, and Purchase/Sell History, you can choose which fields you want to display in the tabbed data grid area of the main EzCoin window. These options are available in the **Field Settings for Data Grids** submenu under the **Options** menu.



Choosing any of the 5 menu options will present a window like the one shown below for inventoried grades.



The left side list is the available fields to show in the data grid. The right side list is the assigned fields. The top to bottom ordering in this list corresponds to the left to right ordering of these fields in the main EzCoin window data grids.

Toolbar Options



1.	Removes the selected fields from the right side list. You can also Right click the selection on the right side list to remove them.
2.	Assign selected items from the available list in the left side list to the right side list. You can also right click the selection in the left side list to assign them.
3.	Undo all changes you have made.
4.	Erase all field assignments in the right side list. You can't save an empty list, so at least one field must be assigned. Use the Reset menu option to restore the assignment list back to the default fields.
5.	Move the selected items in the right side list up or down. Hold down CTRL while clicking to move the selection to the top or bottom of the assigned list.
6.	Save the filtered field list. The main EzCoin data grid will update accordingly.
7.	Cancel all changes and close the editor.

Installed Printers Configuration

EzCoin keeps a configuration file (EzUser.pcf under the **Config** subfolder) for all installed printers on your system. This file is automatically generated when it isn't found (which is the case when you first install the application). The purpose of the configuration is to build a list of the printer capabilities (paper type and other printing attributes) ahead of time, which aids in making printer and paper selection fast, especially when you may have network printers connected which may be offline or unavailable.

Some versions of Windows and certain types of printer installations (especially those across a network) can take several seconds to obtain the printer attributes. This would in turn make EzCoin quite slow in responding to paper and printer selections.

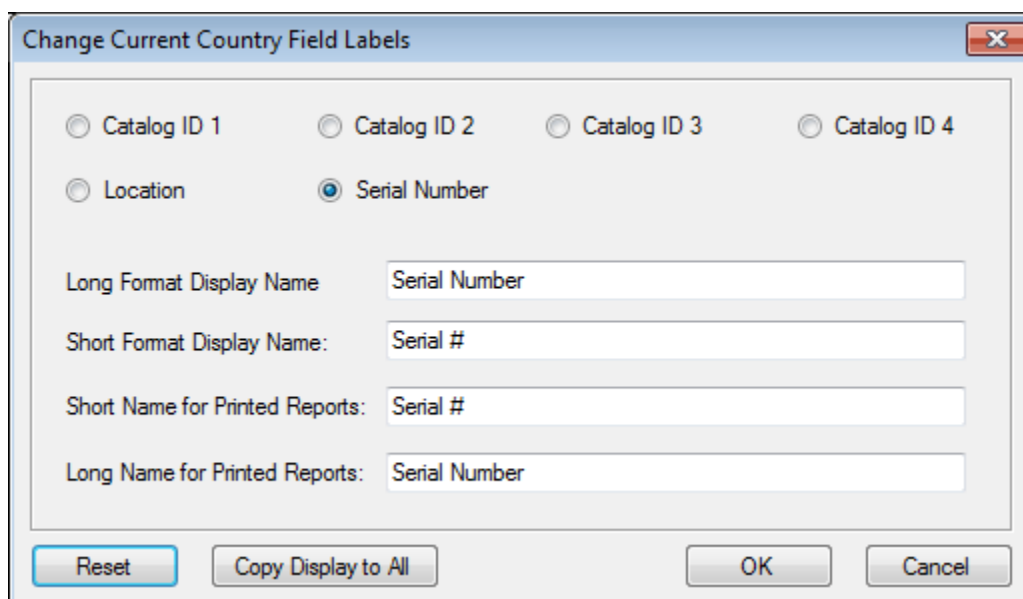
Given this situation, you will want to refresh the printer configuration file after installing a new printer. There are refresh options under the **Options** menu, and also within the Report Profile editor and EzCoin general preference windows.

Setting the Label Text for Country Fields

Most of the labels associated with coin fields are shared across all country files (i.e. Mint Location, Denomination, Composition, etc.). However, 6 fields have labels which can be unique per each country:

- Alternate Catalog ID fields (4 in total).
- Location
- Serial Number

The item **Change Country Field Labels** under the **Option** menu allows you to rename these labels. You can also click on the labels in the main EzCoin window and choose **Rename** from the popup menu.



The screenshot shows a dialog box titled "Change Current Country Field Labels" with a close button (X) in the top right corner. Inside the dialog, there are six radio buttons arranged in two rows. The first row contains "Catalog ID 1", "Catalog ID 2", "Catalog ID 3", and "Catalog ID 4". The second row contains "Location" and "Serial Number", with "Serial Number" being selected (indicated by a blue dot). Below the radio buttons are four text input fields. The first field is labeled "Long Format Display Name" and contains the text "Serial Number". The second field is labeled "Short Format Display Name:" and contains "Serial #". The third field is labeled "Short Name for Printed Reports:" and contains "Serial #". The fourth field is labeled "Long Name for Printed Reports:" and contains "Serial Number". At the bottom of the dialog, there are four buttons: "Reset", "Copy Display to All", "OK", and "Cancel".

Select one of the 6 label fields using the radio buttons. For each selection, the 4 label names will be changed accordingly. There are 2 display formats for the label and 2 print formats.

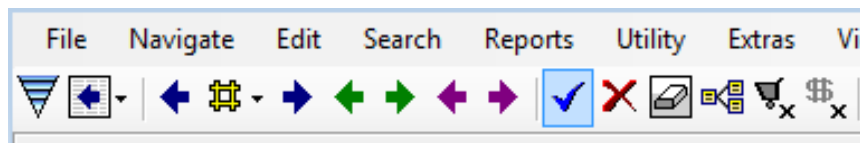
Click the **Copy Display to All** button to transfer the long format display name to the other 3 fields. Click on **Reset** to restore the labels to current global values stored in the report field configuration.

Additional EzCoin Features

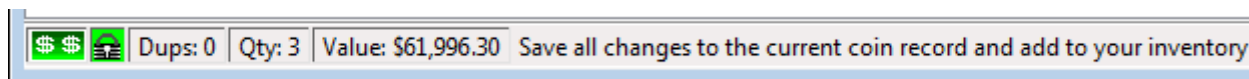
Context-Sensitive and Quick Help Hints

The main EzCoin window provides context-sensitive hint messages in the status bar at the bottom of the window when you move the mouse cursor over buttons and menu items.

Hover over the blue checkbox:

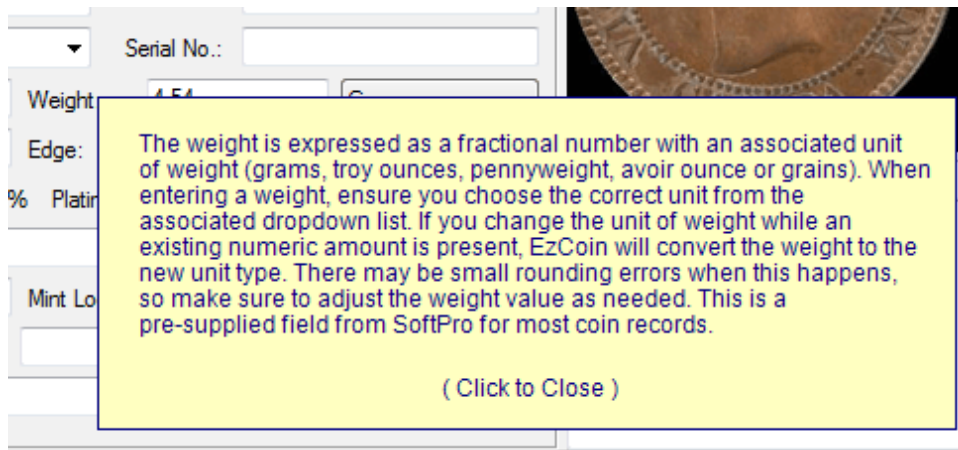


To see the hint message:



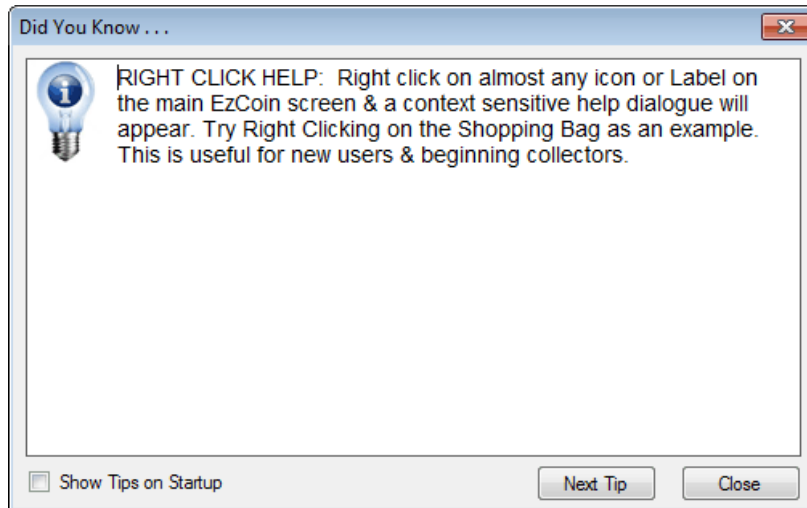
In addition, you can get a more detailed popup quick help message displayed when right clicking on any button or label.

Right click on the label for Weight to see the popup help message:



Tips of the Day

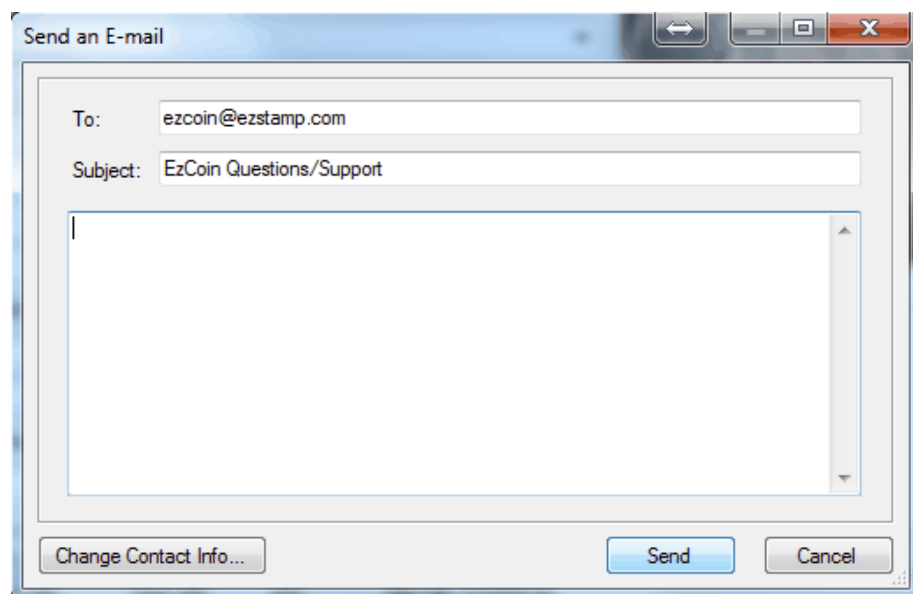
The default status of the tips of the day is to show it when EzCoin is first started. You can use the similar named item under the **Help** menu to show the tips screen at any time. The tips dialog provides a checkbox option to turn it off, and also to step through all the tip messages.



About EzCoin and Sending Email

The about dialog window is displayed when choosing the About EzCoin item from the Help menu. This window will show the current EzCoin build version in the title bar, along with some basic information about your installation of Windows.

The Web site and Email links are clickable. The former item takes you to the EzCoin web site. The latter can be clicked to compose an email to SoftPro. The Send Email button works the same as clicking on the email address link. It will launch a simple email composition window:



Enter your message text into the input box below the *To* and *Subject* lines, then click on **Send**. This will bring up your default mail client at which point you can send the message.

Your contact information is automatically added to the end of the message, along with some basic information about your version of EzCoin and your Windows installation. SoftPro uses this information to help identify what version of EzCoin you are using and what your operating system is. It's recommended that you don't remove this information.

If you need to change your contact information, click the **Change Contact Info** button before sending the email.

Checking for Free Updates

SoftPro will provide free updates for EzCoin to address bug fixes and minor software enhancements. These updates basically cover most things in EzCoin except for supplied data, pricing updates and new images.

Choose the **Check for Free Updates** option from the **Help** menu. EzCoin will check online for any pending updates. EzCoin updates are bundled in one or more archive files, each one containing a special date coin which determines if your copy of the application is up to date. Only required archive files are downloaded, saving time and space.

If EzCoin determines that your files are up-to-date, you will be notified with the message: *Your installation of EzCoin requires no new application updates at this time.*

If any updates were downloaded, EzCoin will close down, and the EzUpdate application will be launched. Refer to the EzUpdate help topic for more information.

Forcing a Full Update

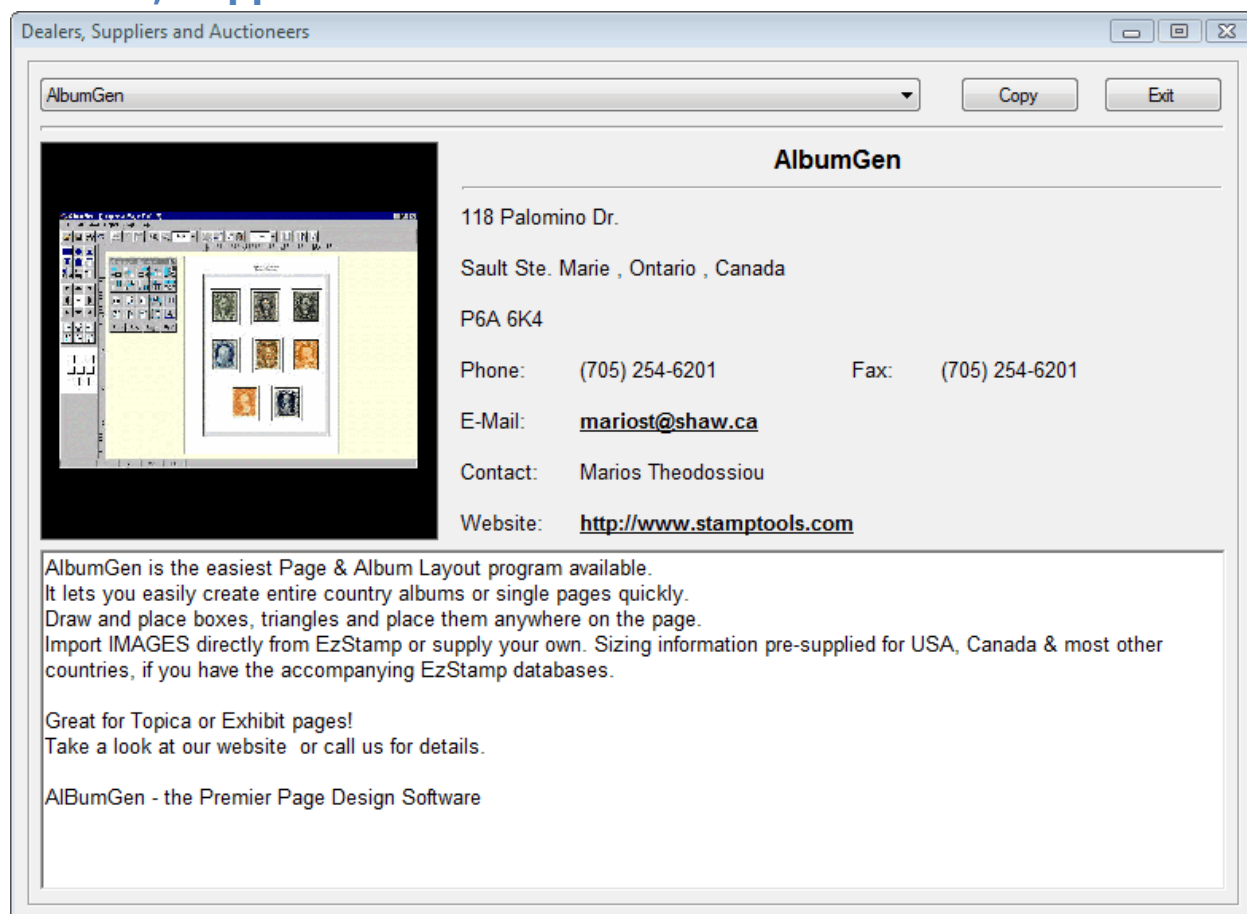
Note: Unless you are experiencing any strange behavior with either EzCoin or the Free Update process, do NOT perform the following action.

EzCoin uses a special update history file named ***EzCoin.upd*** located in the EzCoin installation path. This file contains the up-to-date download activity on your PC for EzCoin updates. If you delete this file and run the free update option, EzCoin will perform a full download of every archive file, and EzUpdate will replace/update from each of these files.

Checking for Updated CD/DVD Releases

Choose the option **Check availability of Updated CDs/DVDs** from the **Help** menu to launch your default Internet browser and navigate to the SoftPro EzCoin updates web page.

Dealers, Suppliers and Auctioneers



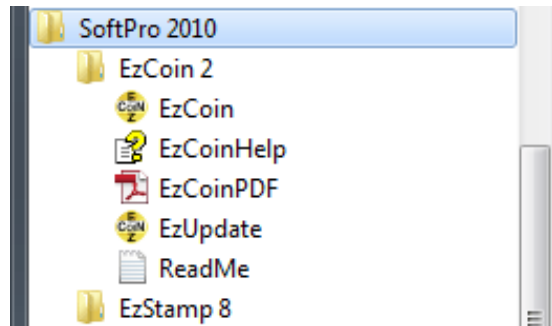
Simply choose a dealer/supplier from the drop down list and the associated information such as phone/fax numbers and contact details will be displayed for you. It can save you hours of hunting through ads for a dealer near you.

Please note that SoftPro is not affiliated with any particular dealers.

This list of dealers, supplies & auctioneers will be updated periodically

EzUpdate – Applying Free and Supplied Data Updates

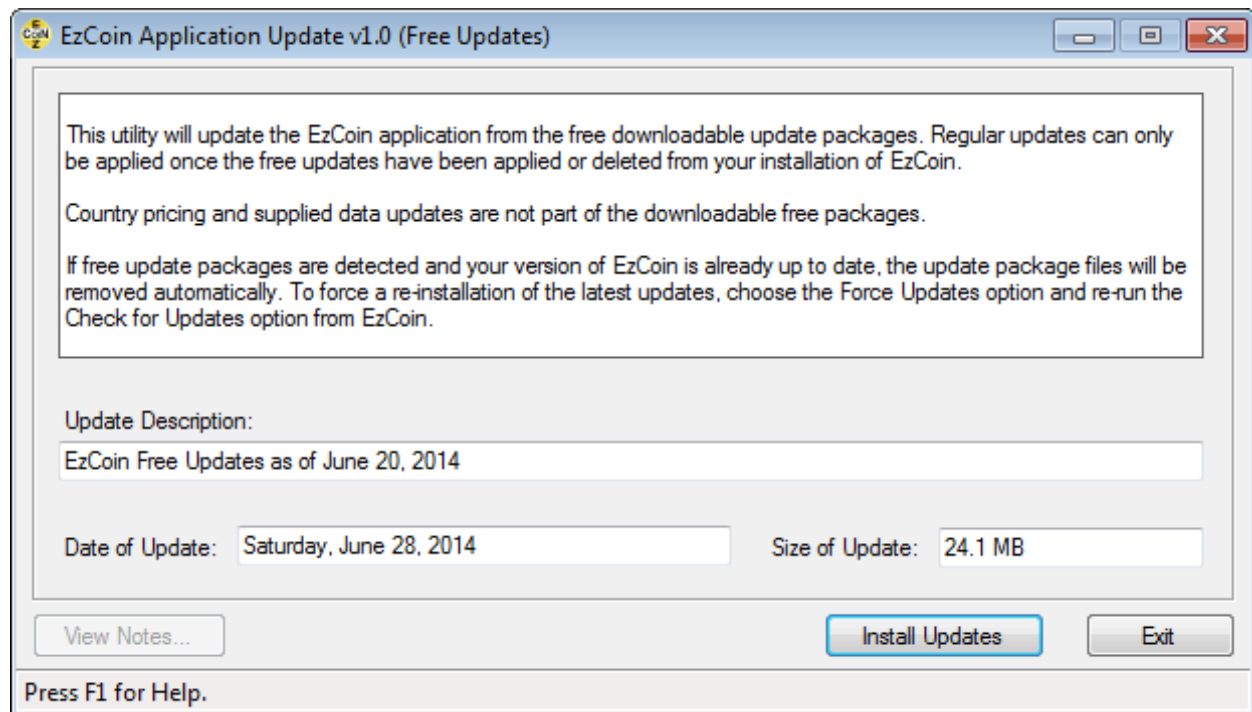
As part of the EzCoin installation, a support application named EzUpdate is provided. This application is automatically launched whenever free updates are downloaded. You can manually run the application by choosing it from Windows Start Menu:



EzUpdate has only one of two windows to display, the choice of which is based on the type of update.

Free Updates

For free updates, the EzUpdate window will appear as below:



The window contains some basic information about the update:

- A brief description of the update package.
- The effective date of the update archive files.

- The cumulative size of all files that were downloaded.

The **View Notes** button can be used to see special information and release notes. The button is only enabled when notes are available.

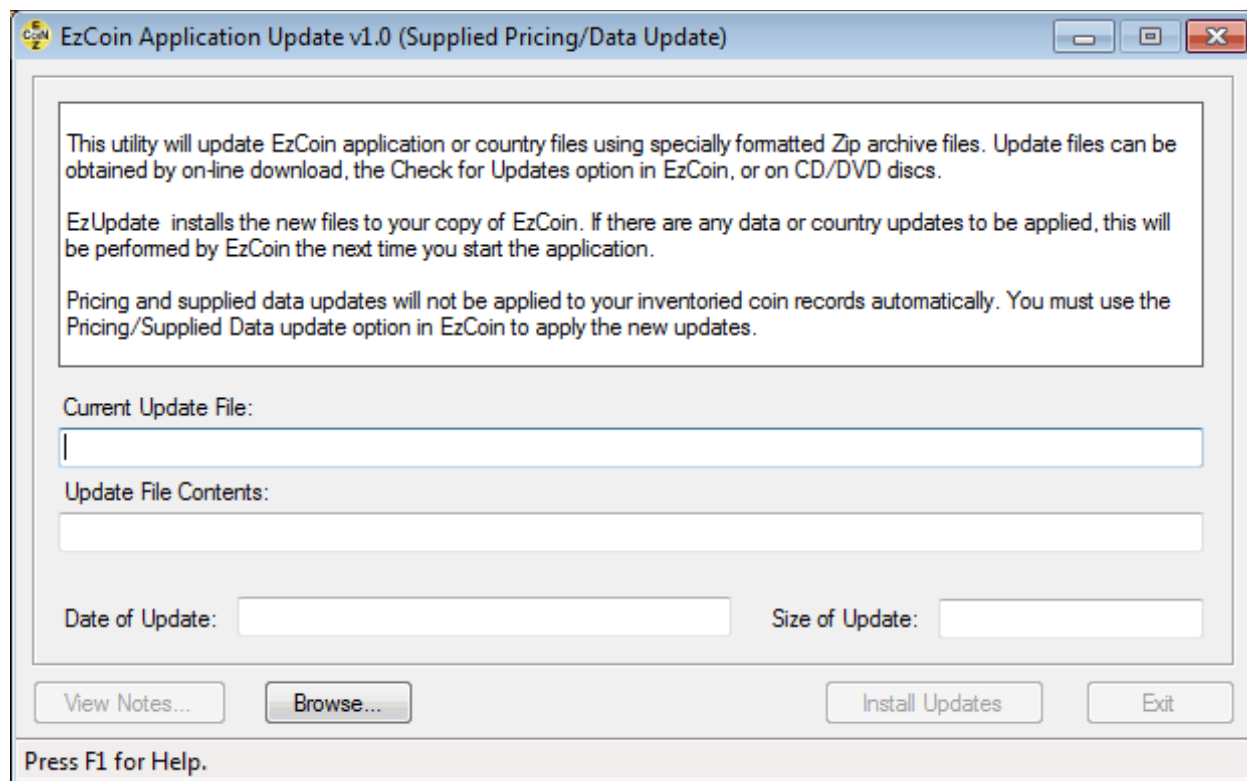
Click on **the Install Updates** button to install any changes from the downloaded archive files. Each file in EzCoin has effective date signatures contained inside of them. EzUpdate will ensure that only files which are newer or different from what is installed with your version of EzCoin is updated. Custom data files, exported information and custom images are never replaced, modified or deleted by EzUpdate. Only pre-supplied data is updated.

Pressing **F1** will provide a simple reference to this help topic.

Note that you can't cancel an update once started. However, if it didn't complete, you can run EzUpdate again and continue from where you left off. You should NEVER run EzCoin until EzUpdate has completely applied the update, or you may experience unpredictable behavior.

Supplied Data and Pricing Updates

The EzUpdate window is slightly different for this type of update:



You must use the Browse button to locate the update archive file (which will be a specially formatted .ZIP file). The archive files can be from online downloads, or distributed on CD/DVD/BD disc media.

Once you select a file, it will be validated for authenticity and integrity. The description, date and size fields will be updated if the file passes validation. Any release notes for the update can be viewed by clicking the **View Notes** button.

Click the **Install Updates** button to start the update process. As with free updates, you can't cancel the update, but can resume an update if it didn't finish on a prior attempt.

EzUpdate and Master/Country Data File Updates

EzUpdate doesn't contain any special functionality to apply updates to your country files or the EzCoin master configuration file (EzCoin.sdf). These updates are handled by EzCoin the next time you start it. Pending country file and master data updates are handled using special files stored in the Setup subfolder of the EzCoin installation path. EzUpdate will extract these files from the update archive and let EzCoin apply the updates from those files. For every country in the archive file, there will be one pending setup file for EzCoin to apply to the associated country SDF file.

PLEASE READ CAREFULLY

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