Anthology

Importing Frontlist titles from Edelweiss

Overview

The Edelweiss system offered by www.AbovetheTreeline.com allows bookstores to review electronic catalogs from various publishers as well as create Frontlist orders and download them into the Visual Anthology program. Reps are also able to create customized orders and 'push' them through to your account on the Edelweiss system.

Setup

First create an account for the Edelweiss system via the http://www.abovethetreeline.com/ website. If you would like more training or assistance on using the Edelweiss system, please contact support@abovethetreeline.com.

When you are getting started in the Edelweiss website, you'll need to set your "POS Default" to show you are using the Anthology system. This ensures the correct format for the export file which you will then import into Anthology. To do this, go to the ADMIN link on the top right of the Edelweiss screen. Under the Administration panel on the left click POS DEFAULT. Set the Point-of-Sale (POS) System field to be ANTHOLOGY.

We also recommend taking a little time to train Edelweiss and Anthology on the Category/Section codes and names each other will use. You can do this manually as you build orders or by a one-time import of all your section codes and names into Edelweiss to use with their AUTOCOMPLETE feature.

To see a list of Edelweiss Categories
Go to ADMIN | Categories | Category tab. Here you will see a list of the various category codes/names Edelweiss uses by default. To the right you can enter your store's preferred section name/code for each. This process can be sped up significantly by doing the autocomplete import.
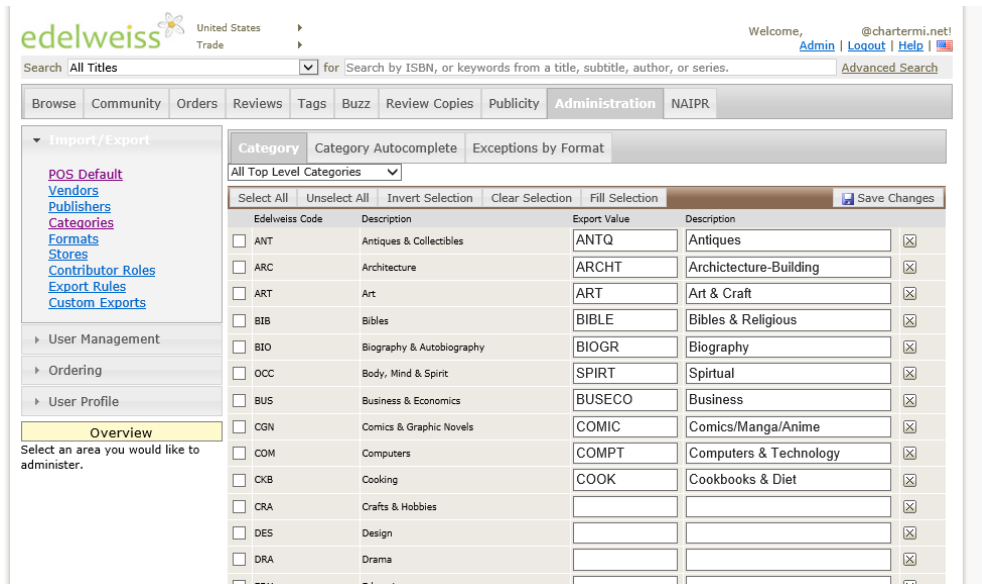
To quickly build the Category Autocomplete list

This requires Anthology version 7.4.361 or higher. This will tell Anthology if it sees a Fetch/Import using the resulting codes, to assign the given name as well.
1. Open Anthology | Master Files menu | "Learned Inventory Associations"
2. Click Actions | "Populate Associations from Short Codes".
3. Check at least Sections and any others desired.
4. Click F12 Post. Once completed you should see a list similar to this:
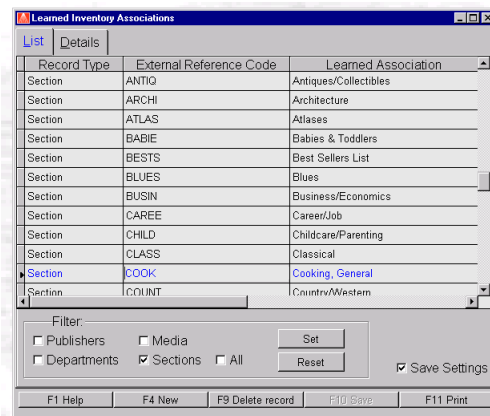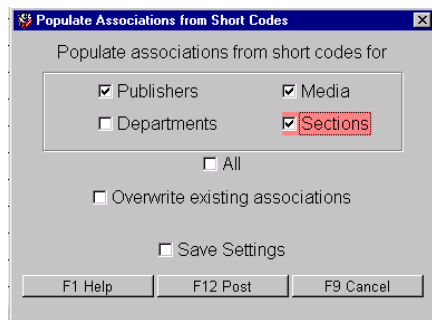
5. Go back to Actions menu, click "Create Above the Treeline Export". You will be prompted with the # of records being exported, along with the location the file has been saved to. MAKE NOTE OF THIS PATH. You will need to browse in the next steps to locate the resulting file named "LearnedAssociations.xls"

6. Use Excel or an OpenOffice product to open the resulting file, review the contents or make any changes. Be sure to SAVE AS | file type of "Excel 97.2003 Workbook (*.xls)". Depending on your system the file may be exported as file type of "MS Excel 5.0/95 workbook", which the Edelweiss system will not be able to use. If you need assistance with this step contact Support@anthology.com

7. Log into your Edelweiss account, go to ADMIN | Categories. Select the "Category Autocomplete" tab. You may need to set the "Category Autocomplete Mode" to "Managed" in order to select the file for importing. Browse to the path noted in # 5 above. Most likely this will be "C:\Program Files (x86)\Anthology\Data" on your server.

8. Click the IMPORT button, you should receive a message indicating "Import Successful!". If you get an error importing, refer to # 6 above.
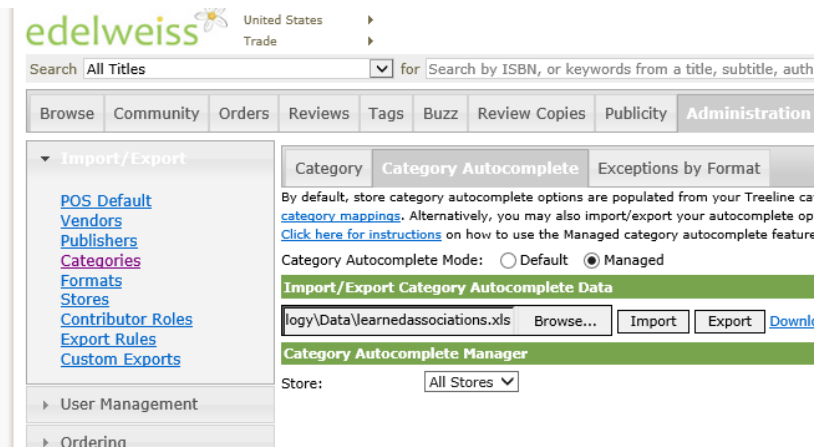
Now as you build orders you can quickly select your preferred Section from a autocomplete list. On the right side of your order, select the "Add Category" link and begin typing in the first few letters of your section. A list of your sections will appear for you to choose from.

Exporting Edelweiss Orders

Only basic steps are listed here, for greater detail or assistance on how to build orders in Edelweiss please contact support@abovethetreeline.com.

1. Log into your Edelweiss account, select the Orders tab. A list of your current orders is shown.

2. Be sure to select "EXPORT PREVIEW" to see a list of included titles.
3. Review the order, ensuring you have your preferred "Store Category" and desired Units noted. If not, go back to the detailed view and make corrections, saving changes.
4. When the list is ready, click the "DOWNLOAD" button.
5. Depending on your browser (IE, Chrome, Firefox, etc.) you may or may not be prompted on where you wish to save the file. Most modern browsers will download automatically to the "DOWNLOADS" folder on your local computer. You may need to go to Start | Computer or search for the file called "OrderExport.txt". Make note of where the file is found, you will need to know the location in the next steps.

Importing Edelweiss files into Visual Anthology

You must be using Visual Anthology version 6.3.041 or higher in order to import the Visual Anthology format.

Once you have created the format and saved the file you can begin the process of importing into Visual Anthology.

- Go to TOOLS | IMPORT EXTERNAL
- Make sure the checkboxes for "Explicit Path" is checked.
- Press "F6 Get" to begin browsing for your file.
- On the new screen be sure to set the "Files Of Type" to "VisualAnthology" before browsing for the specific file.
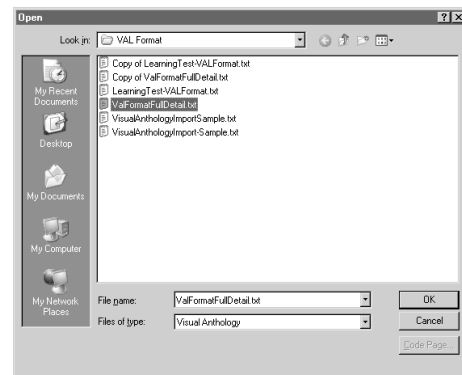
- Next browse to find the file you exported and select.
- Click OK on the file you will be back on the CD Import screen, and seeing the titles you have selected to import.

Once the titles are displayed on the screen you can begin to fine tune any qty's for your orders and begin setting the preferred Department, Section, Media, and Publisher using the reference fields.

IMPORTANT! Dealing with Reference values

If you have not already done the CATEGORY AUTOCOMPLETE steps detailed earlier or a Category/Section was missed, when you import the file the program will not pre-fill in your Department, Section, Media or Publisher directly.   Instead the grid will show those values in a special set of "Reference" fields. This is so you can accurately select those exact pre-existing values from the drop down lists. Note that you must already have those values existing before the import, the import cannot create them for you.

Import File Field Name	Import Screen Column Name
Type-DeptCode	RefDepartment
Binding-MediaCode	RefBinding
Subject-SectionCode	RefSubject
Publishercode	RefPub

To speed up the selection of the actual values for the records being imported, you can sort the grid by a particular column and then mass highlight all the items with the same RefSubject and mass reassign (shift+click on first and last record in the bunch). Then go to the Actions menu and choose Reassign. For example, say your items had "Grade 1-3" and "Grade 3-5" in the import file under Subject-SectionCode itself but in reality you just store those items in the Section called "Childrens". Just click once on the column header for RefSubject which will sort/group all similar records together. You can than mass highlight, go to Actions, choose Reassign and change the Section on all of those items at the same time.

Putting items on an order

If you wish to add these records to an existing order or memo use the field marked "Add Listed Records To:" to choose purchase order, receiving memo, customer order, etc. As you post the records you will be asked to select the memo/order from a list. You may need to create the PO or Receiving Memo just before starting the import.

Completing the Import

When you have made all the needed modifications press "F12 Post" to begin adding the items to your inventory.

If you have chosen to add listed records to a PO or Receiving Memo you will be asked to "Select" the item from a list. Select the item, you will be then asked to add the items or cancel, choose OK. The importing process will begin. If you are adding a large amount of records please wait for the processing to complete before continuing on.