ANTHOLOGY
smart systems for booksellers

Adding Records to Anthology

Before you can begin selling items in the cash register, send an order to a vendor, or record customer purchase amounts for a frequent buyers club you will need to add some core records to your system. This includes Vendors, Customers, Inventory, Sections, etc.

The following document gives you the very basic and quick steps for adding a variety of records to your Anthology program. Please use the online Help system for more information on the various screens mentioned. To view, just click on **Help**, the "***Help on the Web***". You'll find a variety of topics under the topics of "Setup and Configuration" and "Using Visual Anthology".

When adding records look for the * symbol next to a field, this indicates the field is a required one and must be populated with information before you save. In most areas you will press F4 New, enter information, then press F10 Save to add a record.

Print these pages out and keep next to your workstation as a handy reference sheet.

Adding Customers records

1. Go to Master Files, select Customers
2. Press F4 new
3. The coral focus will jump to the top of the screen, starting in the Salutation field
4. Press tab key to move the focus to the "First Name" field, fill in name
5. Press tab key to move the focus to the "Last Name" field, fill in name
6. Press tab key to move the focus to the "Short Code" field. This will be pre-filled in with an abbreviation of the last name, but you can modify this value.
7. Press tab key to cycle through to the next fields, filling in desired information
8. When done press the F10 Key to save your record.
9. If you wish to immediately add another Customer, press F4 New and repeat steps above, remembering to F10 Save when done.

Adding Vendors records

1. Go to Master Files, select Vendors
2. Press F4 new
3. The coral focus will jump to the top of the screen, starting in the Name field, fill in name
4. Press tab key to move the focus to the "Short Code" field. This will be pre-filled in with an abbreviation of the last name, but you can modify this value.
5. Press tab key to cycle through to the next fields, filling in desired information
6. When done press the F10 Key to save your record.
7. If you wish to immediately add another Vendor, press F4 New and repeat steps above, remembering to F10 Save when done.
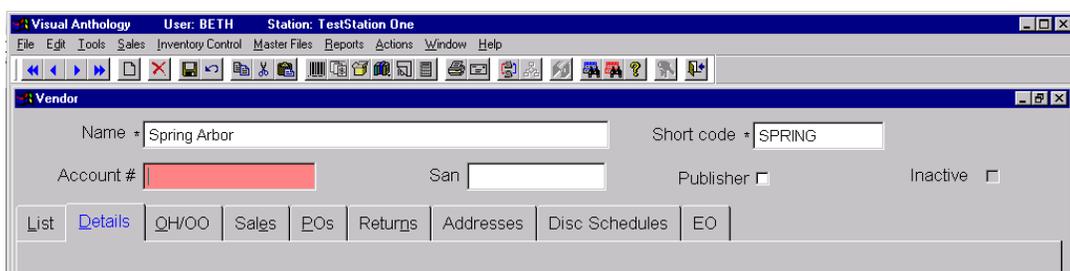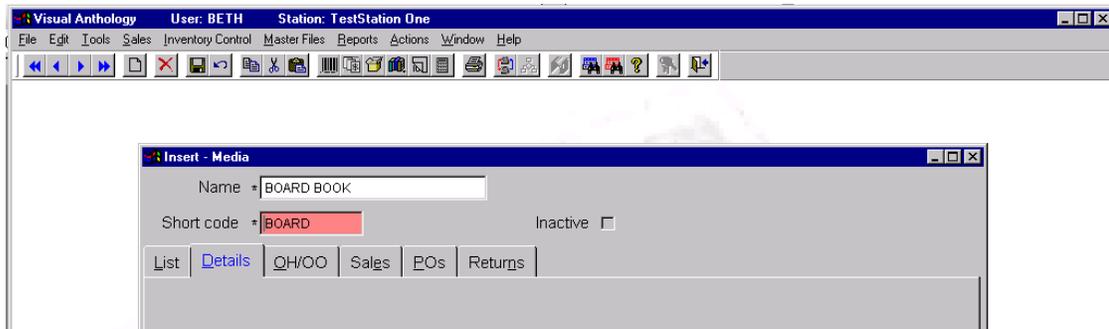

Adding Department records

1. Go to Master Files, select Departments
2. Press F4 new
3. The coral focus will jump to the top of the screen, starting in the Name field, fill in name
4. Press tab key to move the focus to the "Short Code" field. This will be pre-filled in with an abbreviation of the last name, but you can modify this value.
5. Press tab key to cycle through to the next fields, filling in desired information
6. When done press the F10 Key to save your record.
7. If you wish to immediately add another Department, press F4 New and repeat steps above, remembering to F10 Save when done.
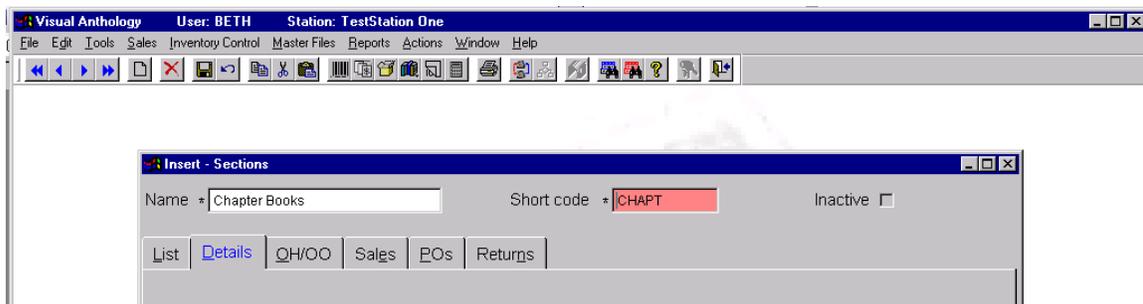
Adding Media records

1. Go to Master Files, select Media
2. Press F4 new
3. The coral focus will jump to the top of the screen, starting in the Name field, fill in name
4. Press tab key to move the focus to the "Short Code" field. This will be pre-filled in with an abbreviation of the last name, but you can modify this value.
5. Press tab key to cycle through to the next fields, filling in desired information
6. When done press the F10 Key to save your record.
7. If you wish to immediately add another Media, press F4 New and repeat steps above, remembering to F10 Save when done.

Adding Sections records

1. Go to Master Files, select Sections
2. Press F4 new
3. The coral focus will jump to the top of the screen, starting in the Name field, fill in name
4. Press tab key to move the focus to the "Short Code" field. This will be pre-filled in with an abbreviation of the last name, but you can modify this value.
5. Press tab key to cycle through to the next fields, filling in desired information
6. When done press the F10 Key to save your record.
7. If you wish to immediately add another Section, press F4 New and repeat steps above, remembering to F10 Save when done.

Adding Inventory records

Some stores opt to first add their basic inventory records with an OnHand amount of zero. This allows them to later use the Purchase Order and Receiving Memo modules to properly receive inventory items as well as track the cost from that particular order. If you opt to add inventory records with an OnHand amount and skip recommended receiving practices understand that the cost of these items likely will not be accurate when running various reports later and can be very time consuming to correct.

For best understanding and results please first watch the following videos on the Customer Zone under Video Training:

- INV Webinar Training- Non Book Inventory
- PO Purchase Order Webinar Recording
- REC Receiving Webinar
- COST Modify COGS

There are two basic ways to add a simple inventory record. The best method is covered first. Most often this screen is used to enter in a batch of similar items such as Book Department items in the Science Fiction Section.

1. Go to Master Files, select Inventory. Go to Actions menu, choose "Quick Inventory Add" (QIA). The QIA window will appear with the focus in the ISBN/SKU field on the top left.
2. Note that several fields on this screen have a small padlock icon to it's left. This icon allows you to fill in the common values for the batch to be entered and lock those values down. As you add each record and save, those locked values will remain in place. This feature allows you to quickly add similar records without needing to manually set every single field each time. If you wish to change a value for an item, simply click on the padlock icon again to unlock the field.

3. Scan or key in the ISBN/Sku value. If you have Webfetch enabled the available title information will be filled in automatically. In the image above, note the three fields running along the bottom of the QIA window for Publisher, Binding, and Subject. The values shown are what the Webfetch resource suggests, however your store may choose to use different values. For example, perhaps your store would consider this item to be in the Science Fiction Section and not the Fiction section. As you set your preferred Sections, Media, etc. the program will begin to associate the incoming value with your preferred value. The next time an item comes in with the same suggested subject, Anthology will automatically fill in your Section (unless already padlocked) with the last value the store had selected. Over time the staff would have less and less to modify on items being fetched. You can always change a value if the last value was not correct.
4. Press tab to cycle through the available fields, filling in desired information.
5. The ISBN/SKU, Title, and Department fields are the only required values.
6. Press F12 Save to finish adding/saving the item to the inventory. The QIA window comes up blank so you can quickly enter a stack of books.

Option #2

1. Go to Master Files, select Inventory
2. Press F4 New
3. A blank Inventory screen appears with the focus in the ISBN/SKU field on the top left.
4. Fill in the ISBN/Sku value. (Note Webfetch users will have available title information filled in automatically).
5. Press tab to cycle through the available fields, filling in desired information.
6. The ISBN/SKU, Title, and Department fields are the only required values.
7. Press F10 Save to save the record.