Anthology, Inc.

Creating custom Import files for Ingram Companion

To create the Anthology format, follow these steps for Companion^{tm}

1. Click on FILE | DISPLAY FORMATS.
2. Click on the tab named EXPORT FORMATS.
3. Click on the NEW button.
4. This will take you to the Customer Record Layout Editor where you can create a new export format.
5. To create the Anthology format, find these fields in the lower portion of the box, and drag them (in this order) to the upper portion of the box.

    ISBN
    Title
    Contributor
    BISAC binding type
    Ingram list price
    Publication date
   BISAC subject or Ingram subjects
    Publisher Code

6. Once you have these eight headings in order, click on the SAVE button at the foot of the screen. It will prompt you for a name for the custom format you have created. Name it "Anthology" and press enter.

To use the new format, follow these steps:
1. Do a search for the items you wish to export. If you only want to export a few of the titles found, mark with a checkmark in the box to the left of the title.
2. Click on FILE | EXPORT.
3. Click on "All records" if you wish to export the complete list of titles found in your search, or "Marked records only" if you wish to export only the items you marked.
4. Select the "Anthology" format from the drop down list of formats.
5. Click on the "Type" drop-down box, and select "CSV (comma delimited).
6. Click on the EXPORT button. Save the file to any location with any file name. **You will need to remember the location and the file name so you can locate the file from within anthology.**

    •   If you specify the same filename as an existing file in the same location, Companion will prompt you to ask if you want to append to the existing file. If you do so, the new data will be added to the end of the previous file to make one bigger file. If you choose N, then the new data will replace the old.
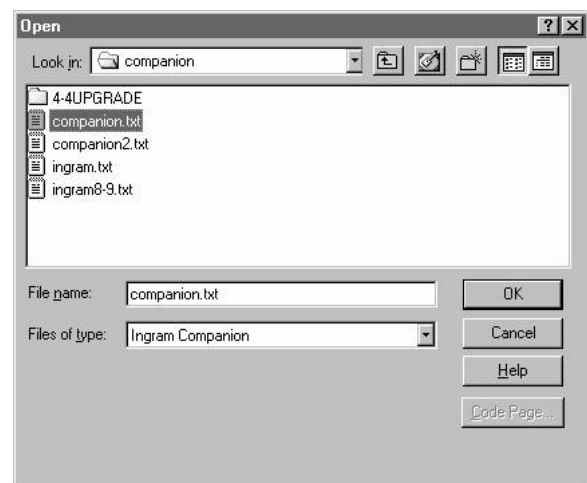
Using Import External Data in Visual Anthology

Once you have created the format and saved the file you can begin the process of importing into Visual Anthology.
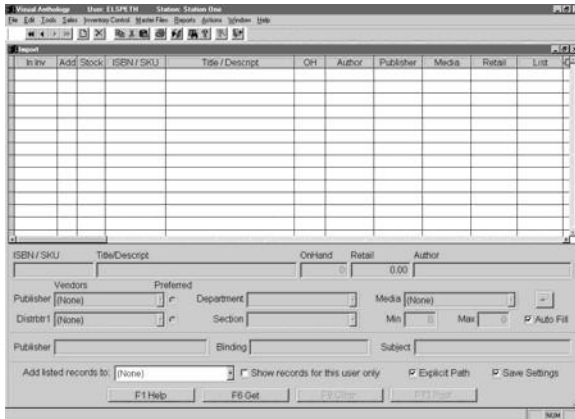
Go to TOOLS | IMPORT EXTERNAL

On the new screen press "F6 Get" to begin browsing for your file. You must browse to find the file you saved from Ingram Companion.

You must select the appropriate "Files Of Type" of "Ingram Companion" for the import to work.

When you select OK on the file you will be back on the CD Import screen, and seeing the titles you have selected to import.

You must select a department for every title. You have the option of selecting the Publisher, Distributor, Section, Media, and Min/Max information for each title.

The Auto Fill option if left on will flood the selected Publisher, Distributor, Section, Media, and Min/Max information to the next title.

The CD Import screen will display what Publisher, Binding, and Subject information is related to the title. You can use this information in determining the best settings for the record.

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.

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