Importing Ingram IPage Selection Lists

Overview

The IPage system by Ingram https://ipage.ingrambook.com allows bookstores to build "Frontlist" and "Backlist" orders and download them into the Visual Anthology program.

Setup

First you must have an existing account with Ingram. If you do not already have an account or would like more training or assistance on using the IPage system, please contact Support@ingram.com.

There are a few areas within the IPage system that you may wish to configure to speed up the process of importing into Anthology. While it is not required, setting these defaults can save you time later.

1. Log into your IPage account
2. Click the "Change Settings" link at very top right of screen.
3. In the Change Settings screen, click on "User Settings" on the bottom right.
4. Under the heading "Selection List Option Preferences" set the "Download Format" to your desired output. There are two choices here for Anthology systems, the "Bisac Frontlist Format" and "Comma Delimited Format". The Comma Delimited is the better of the two as it will provide Order Quantities if you entered them when building the selection list.

Building Selection Lists

First, create a basic Selection List to hold titles as you are building your potential order. We recommend that you build out one section of the store at a time. This can be a real time saver when linking the Reference fields in the import file. We'll discuss this later - please take note though.

- Click on the "Selection List" link found in the top right of the main screen.
- In the new window click on "Create New List". Fill in a Name and then click Create at bottom right.

As you do your searches, or work with suggested lists you have the ability to send items to the Selection List. When looking at the detail of any title, the far right side of the screen will have an area marked "Selection List Options".

- Simply choose the name of the selection list created earlier □ Enter in the Qty to be ordered □ Click Add to List.

Download Selection Lists

Once you have created your Selection list you will need to download the file to your computer, to a known directory and with a known file name. Go to the Selection List link at the top of the site. To the right side of the particular selection list will be a "Download" button.
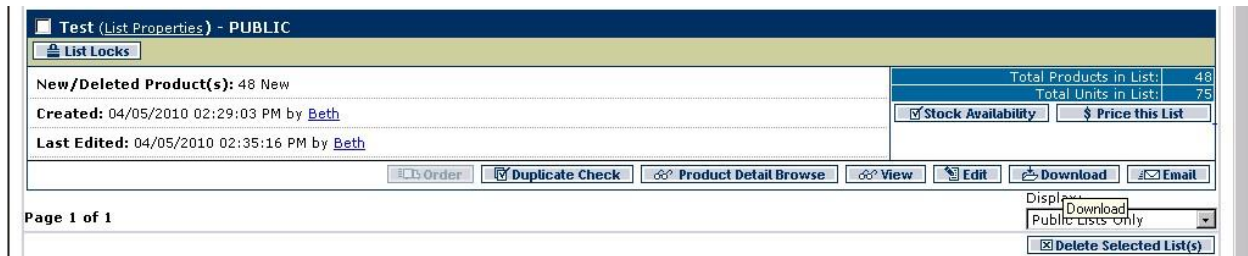
You will then be brought to the Download Options page. Again, you have two options for the format, Bisac Frontlist and Comma Delimited. Both can be imported into Anthology using different format/file types but **only** the Comma Delimited provides you with the order quantities you entered earlier.

 Click the "Download List" button and choose to name and save your file somewhere on the system.

Important: Make note of exactly what you call the download file and where you save it. You will be browsing back to that location during the import process.

If you are an Anthology Private Cloud, Anthology RDS or Anthology Cloud user - you should be familiar with how to work with files and drives. Please read the following document and section; **Anthology Private Cloud Basics** - *Working with Drives and Desktops.*

Importing IPage Selection Lists into Visual Anthology

You must be using Visual Anthology version 9.1 or higher in order to import the "Ingram IPage" or "Ingram IPage Order" formats.

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 Data*
- Make sure the checkbox 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 either "Ingram IPage" or "Ingram IPage Order".

- Remember, the file format you chose to download the Selection list determines the import file type you'll choose here.
  - If you chose "Bisac Frontlist" option when downloading from IPage, you will choose the "*Ingram IPage*" format.
  - If you chose the "Comma Delimited CSV" format when downloading, then choose the "*Ingram IPage Order*" format.
- Once the File of Type has been selected locate the file you downloaded and select it.
- When you click OK you will be taken back to the Import screen, and see the titles you have selected.

Once the titles are displayed on the screen you can begin to adjust any quantities for your orders and begin setting the preferred Department, Section, Media, and Publisher using the reference fields.

Reference Fields - (Important)

When you import the file Visual Anthology <u>does</u> <u>not</u> pre-fill in your Department, Section, Media or Publisher names 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 in the lower part of the screen.

Note that you must already have values for Department, Section, etc. existing in your Visual Anthology before the import; the import routine does not create them for you.

Remember, once you have assigned an item with a "Reference" to an actual field in your system - Visual Anthology will use "Learning" to remember this assignment and you will not have to make this edit again.

1. The import screen is now populated with the contents of the file. There are a few things to note here.
   a. Notice the column named "**In Inv**". If this column contains a check mark then Visual Anthology has found this record in you inventory file. This record <u>will</u> <u>not</u> be updated; it is skipped.
   b. Also notice the column "**Qty**". There are two things to consider:
      i. If you are using Ingram IPage Order format (CSV) then you'll have values in this field.
         1. This value is the quantity of each item you either ordered from IPage or expect to order using Visual Anthology.
         2. If you ordered from IPage directly
            a. You should place this on a Purchase Order and post it without placing the order to the vendor through Visual Anthology. Since

you already ordered from IPage - reordering here would double your order.

b. This will create an "Open PO" (Receiving Memo) waiting for you to receive the items.

c. Notice the columns for **Subject** and **Department** are empty. We will use reassign to assign these columns values to the corresponding values Visual Anthology Sections and Department tables.

Note: If you have not already created your sections and departments in Visual Anthology you should stop and do so.

Example, if you are importing titles for your **Cooking** Section of the **Book** department - you will need to have created a department named "Book" and a section named "Cooking".
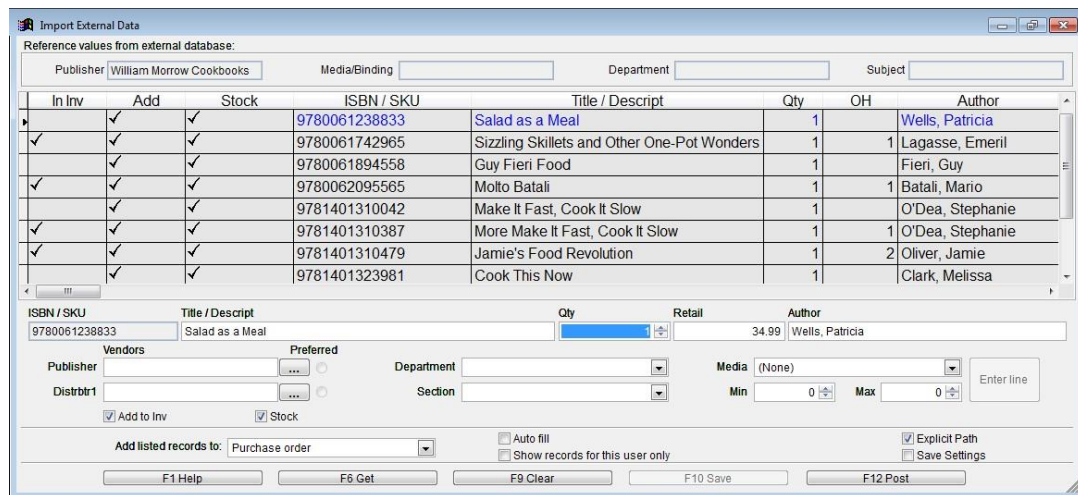

Using Reassign to link Reference Fields

1. If you have not used Reassign before don't worry - it is a simple operation. Looking at our Import screen we see all the tiles have been brought in. We typically recommend that your Selection Lists are restricted to only one department/section of your store per list. This way the reassign may be used most efficiently.

   a. If you only download books for one section of your store then skip to instruction 2 on this list and continue.

   b. If you have downloaded for <u>more</u> than one department/section you evaluate each line of the import screen and assign the proper Department, Section, Publisher, etc. Sometimes for small imports this is the fastest method.

2. REMEMBER: these steps assume you are assigning the listed items (all of them) to the same Department/Section.
   Press and hold the shift key on your keyboard and select (click it) - the entire line should turn blue.

3. Continue to hold the shift key down and with the mouse click the scroll bar at the right side of the grid and scroll to the last record.
4. Still holding the shift key down click the last record in the grid - the entire grid should be highlighted in blue (shown below).
5. Ok, you let the shift key up now - but don't click anything or you could drop the selection.
6. Next select Actions → Reassign from the Visual Anthology menu

   One More Warning: this next action assumes that <u>ALL</u> the records selected are going to be assigned to <u>one</u> Department/Section in Visual Anthology.

7. On the Reassign screen place a check next to Section 1 and choose the correct section. Do the same for Department.
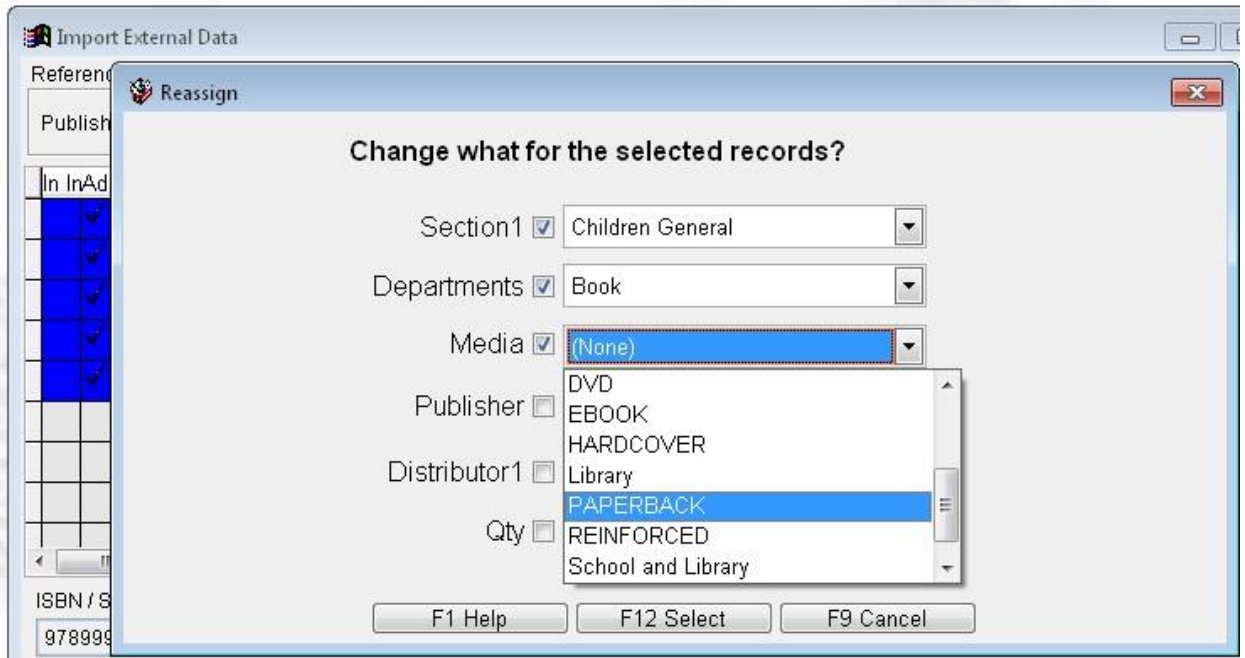
8. Click F12 Select to accept the changes.
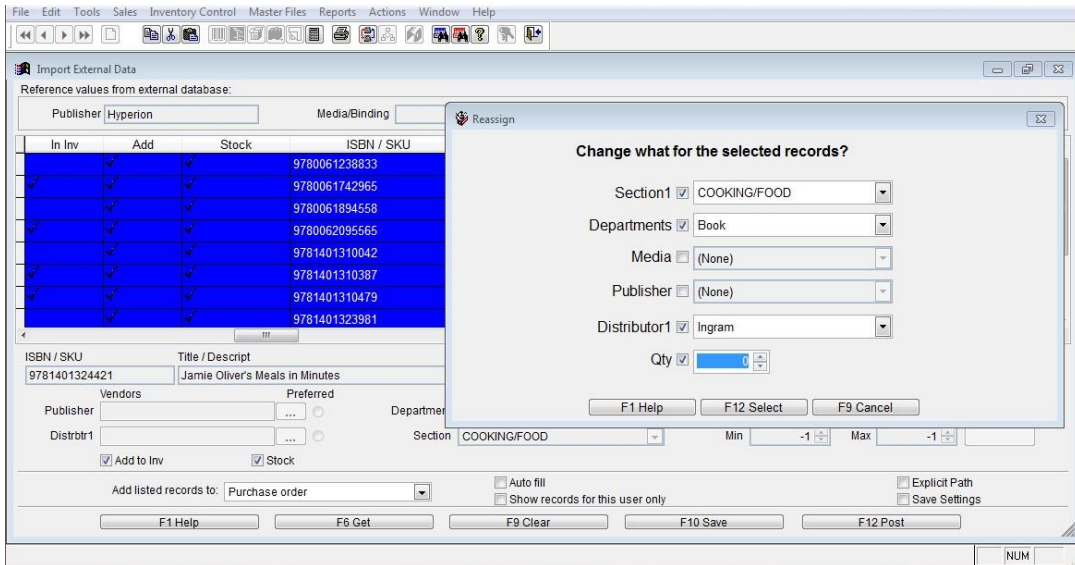
9. Next we choose F12 Post to update the inventory and Purchase Order
10. The "Pick PO" screen appears.
11. Select the appropriate Purchase Order and choose F12 Select.
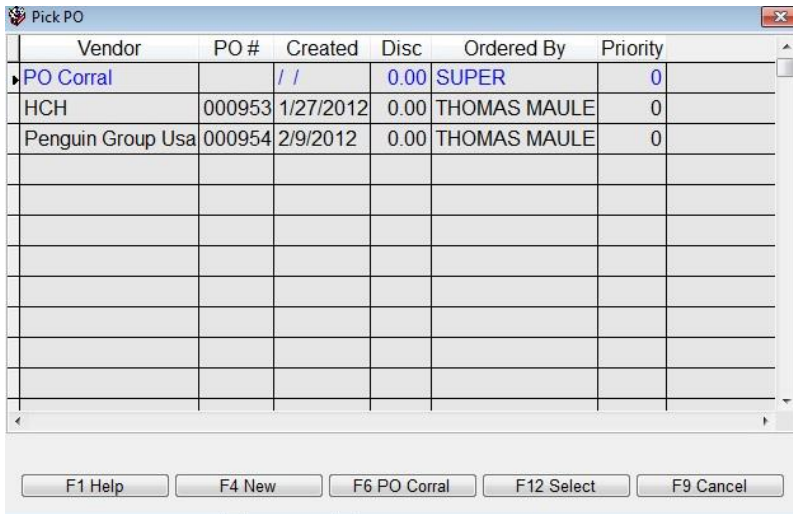
12. You can now open the Inventory and Purchase Orders screens and confirm the data is there.
13. Before you send the Purchase Order, be sure to edit the amount to be ordered for each record.