

## IMPORTING YOUR DATA: Songtracker Pro (STP) field name matches from your legacy files

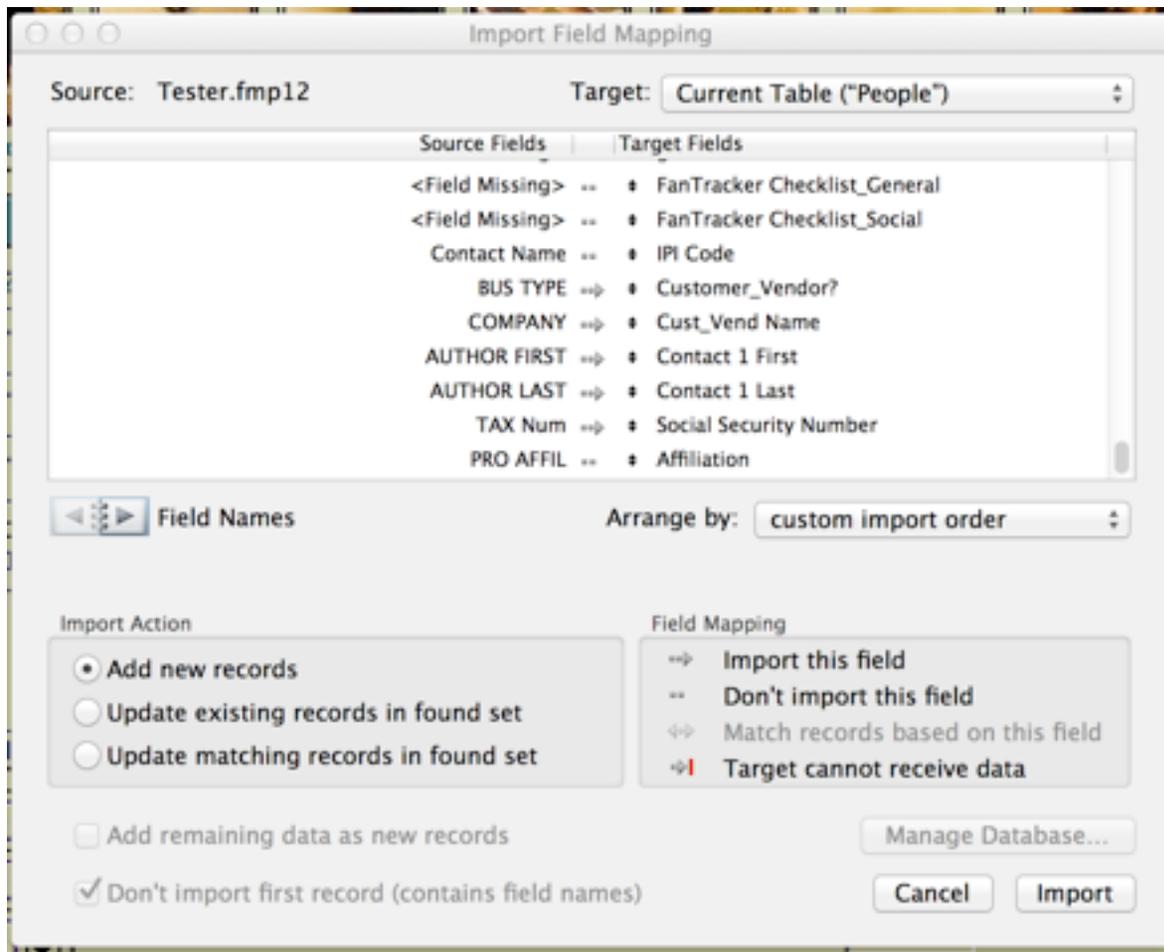
With Filemaker Pro installed (trial version or full version), open the Songtracker Pro files by double-clicking the “\_Songtracker.fp12” file. This will boot the entire Songtracker Pro system with all its files (this may take a few minutes- see our online video QuickStarts for general info not related to Importing). If you are working on a Demo version you may want to limit the amount of importing you do since you will need to do it again once you receive your Full Working version of Songtracker. Demo versions of our files cannot be upgraded to full versions.

TIP: Always perform your “Import Records ---> File...” (see “File” menu) FROM our designated Songtracker File using Filemaker Pro. Because Songtracker Pro uses multiple files to manage this relational database, it is necessary to perform Imports using different specified Files, as explained on the pages below...

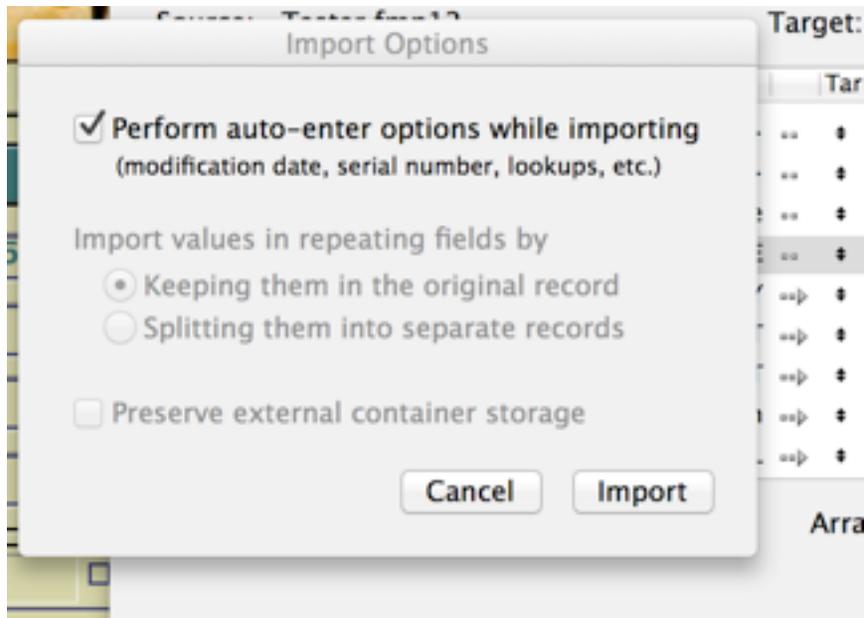
### PEOPLE - general Contact data

Select the PEOPLE file from your “Window” menu (at top of screen) and click the “Click Here to Continue...” button to go to the correct Data entry layout. Choose “Import Records ---> File...” from your “File” menu to setup your Import mapping of fields. Select your Excel file or Text file of Contacts that contain your desired data:

<b><i>STP FILE Name</i></b>	<b><i>My Field Name</i></b>	<b><i>-----&gt;</i></b>	<b><i>Songtracker Field Name</i></b>	<b><i>Description</i></b>
PEOPLE	Contact #		Cust_Vend Number	main unique contact code- <b>required</b>
PEOPLE	BUS TYPE		Customer_Vendor?	Author, Publisher, %Points, etc. cleanUp to match our value list after import
PEOPLE	Company		Cust_Vend Name	name of publisher or Author’s company etc.
PEOPLE	Author First		Contact 1 First	no space(s) after name
PEOPLE	Author Last		Contact 1 Last	no space(s) before last name
PEOPLE	TAX NUM		Social Security Number	tax number, id
PEOPLE	PRO_AFFIL		Affiliation	ASCAP, BMI, CCLI etc.



Locate and drag the desired field in the "Target Field" column (see dialog above) until it lines up with your matching field according to the provided list. Be sure to click on the arrow between the matching fields to designate them to import (as shown in Dialog above). NOTE: Many fields that do not apply may be ignored. Click the "Import" button once all your fields are correctly lined up with Songtracker fields and are selected. A second dialog will appear:



Always check/select the “Perform auto-enter options while importing” checkbox and then click the ‘Import’ button to perform the actual import. This checkbox allows us to do some house-keeping during the import operation, auto-adding creation dates and necessary fields, etc.

Immediately after this import, manually correct each record entry, on the current Data Entry screen, with the “Customer\_Vendor?” pop-up menu (located directly above the First Name field). Modify each record to reflect the correct entry (i.e. “Author”, “Publisher” or “%Points” (“%Points” used for Artists, Record Co’s, Producers, and other business contacts other than Authors or Publishers), - always use the most fitting match for each contact (even when some contacts might have multiple types). There is more information in our built in Help file about this if needed.

----- **ADDRESSES**

Select the ADDRESS file from your "Window" menu (at top of screen) and click the "Click Here to Continue..." button to go to the correct entry layout. Choose "Import Records ---> File..." from your "File" menu to setup your Import mapping of fields. Select your Excel file or Text file of Contacts that contain the desired data:

the following fields should be imported **from** our **ADDRESS** file making sure to import the Contact # field:

<b><i>STP FILE Name</i></b>	<b><i>My Field Name</i></b>	<b><i>-----&gt;</i></b>	<b><i>Songtracker Field Name</i></b>	<b><i>Description</i></b>
ADDRESS	Contact #		Cust_Vend Number	main unique contact code- <b>required</b>
ADDRESS	Address 1		Address 1	
ADDRESS	Address 2		Address 2	
ADDRESS	CITY		City	
ADDRESS	STATE		State	
ADDRESS	POSTAL		Zip Code?	
ADDRESS	COUNTRY		Country	
ADDRESS	Address Name		Addr Name	only if available; otherwise, see NOTE below

Address Name: Each imported Address must have an Address Name assigned to it. To automatically add the required Address Name to each imported record, follow the instructions under "IMPORTANT" below:

**IMPORTANT:** Immediately after the Import is performed, click in the "Address Name" field (in this ADDRESS file) and type "Home Addr" or "Main Addr" (no quotes); - with cursor still in the field, choose the "Replace Field Contents..." command from your "Records" menu (at the top of the current Window) and click the "Replace" button on the provided dialog. This will automatically populate "Home Addr" or "Main Addr" into **every** record you just imported (Easy!!!).

**NOTE:** You may have multiple addresses for any contact, in PEOPLE. If your data includes fields for additional addresses, for any contact, you may import them by repeating the Import and operation above for each address. BE SURE to use a different "Address Name" for each imported address for that contact (i.e. "Address 2", "Shipping Address", International Address", Studio Address" etc.).

Your Company Name here [Show Full Screen](#)

Helpful for e...  
an enter data

Cus...  
Addr...  
Export...  
Import...  
Address...

needed

Duplicate

etter Addr?

dd Dept?

dd County?

Soc Sec. #

Notes

No Statements

Birthday caln

### Import Field Mapping

Source: Addr Tester.fmp12 Target: Current Table ("Address")

Source Fields	Target Fields
Address 1 →	Address 1
Address 2 →	Address 2
City →	City
State →	State
Postal →	Zip
Country →	Country
Contact # →	Cust_Vend Number
	Address Name
	Address ID

Field Names Arrange by: custom import order

Import Action

- Add new records
- Update existing records in found set
- Update matching records in found set

Add remaining data as new records

Don't import first record (contains field names)

Field Mapping

- Import this field
- Don't import this field
- ↔ Match records based on this field
- | Target cannot receive data

Manage Database... Cancel Import

## ----- PHONES & Email Addresses

PHONE Numbers: A separate import must be performed for each Type of Phone # in your files (Phone 1, Phone 2, etc). Phone Names are required for each phone number imported, so be sure to follow the "IMPORTANT" note below.

Select the PHONES file from your "Window" menu (at top of screen; this File often appears under the "Show Window" sub-section) which should show the correct entry layout as shown here...

Link ID	CV120
Phone Name	Main
Dial Phone #  Phone	555 555-5555
Type n ID Key	MainCV120
Phone ID	51000003

**This Related screen NOT for data entry (DEVELOPMENT USE ONLY!)**

PhoneStringCalc	5555555555
Formatted Phone	555 555 5555
Phone Name Display	Main
DialPhoneNumber	1555555555

1 Sample Records?

Choose "Import Records ---> File..." from your "File" menu to setup your Import mapping of fields. Select your Excel file or Text file of Contacts that contain the desired phone data:

1. the following fields should be imported separately **from** the **PHONES** file making sure to import the Contact # field:

<b><i>STP FILE Name</i></b>	<b><i>My Field Name</i></b>	<b><i>-----&gt;</i></b>	<b><i>Songtracker Field Name</i></b>	<b><i>Description</i></b>
PHONES	Contact #		Link ID	main unique contact code- <b>required</b>
PHONES	PH1		Phone	main phone number

IMPORTANT: Notice that the text “Main” was auto-entered into the “Phone Name” field for each record. This is necessary to identify the Main phone number that you use when contacting this person. Only the main phone number should be labeled “Main”. On other phones, see the instruction provided below.

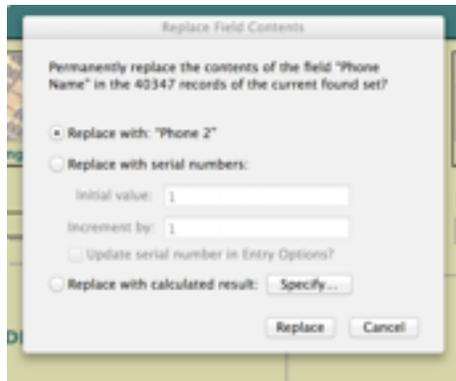
Each Phone Number type (your field column) must be imported separately since there is only ONE phone number field in our PHONES file (this allows you to have unlimited phone numbers per contact and view *relational* data from within the PEOPLE file and see all related phone #s)

2. the following fields should be imported separately **from** the **PHONES** file making sure to import the Contact # field:

PHONES	Contact #		Link ID	main unique contact code- <b>required</b>
PHONES	PH2		Phone	phone number 2 etc
PHONES	PH2 Loc		Phone Name	location if available

IMPORTANT: If you did NOT import a Phone Name, follow the next step (otherwise skip it) - Step 2 (if needed)

Immediately after the Import is performed, click in the “Phone Name” field (in this PHONES file) and type “Phone 2” (or your desired phone name; i.e. “European phone”, “Studio Phone”, “Cell Phone”, etc.), if one wasn’t imported; with cursor still in the field, choose the “Replace Field Contents...” command from your “Records” menu (above) and click the “Replace” button on the provided dialog. This will automatically populate your desired Phone name label into **every** record you just imported.



3. the following fields should be imported separately **from** the **PHONES** file making sure to import the Contact # field:

PHONES	Contact #	Link ID	main unique contact code- <b>required</b>
PHONES	PH2	Phone	actual phone number
PHONES	PH3 Loc	Phone Name	location if available

**IMPORTANT:** Immediately after the Import is performed, click in the “Phone Name” field and type “Phone 3” (or your desired phone name; i.e. “European phone”, “Studio Phone”, “Cell Phone”, etc.); with cursor still in the field, choose the “Replace Field Contents...” command from your “Records” menu (above) and click “Replace” on the provided dialog. This will automatically populate your desired Phone name label into **every** record you just imported.

4. the following fields should be imported separately **from** the **PHONES** file making sure to import the Contact # field:

PHONES	Contact #	Link ID	main unique contact code- <b>required</b>
PHONES	FAX Num	Phone	actual FAX number

**IMPORTANT:** Immediately after the Import is performed, click in the “Phone Name” field and type “FAX”; then with cursor still in the field, choose the “Replace Contents” command from your “Records” menu (above) and click “Replace” on the provided dialog. This will automatically populate your desired Phone name label into **every** record you just imported.

If you have an Email address, perform this step again as follows (if not, ignore):

5. the following fields should be imported separately **from** the **PHONES** file making sure to import the Contact # field:

PHONES	Contact #	Link ID	main unique contact code- <b>required</b>
PHONES	Email Address	Phone	full email; no spaces or extra characters

**IMPORTANT:** Immediately after the Import is performed, click in the “Phone Name” field and type “Main Email”; then with cursor still in the field, choose the “Replace Contents” command from your “Records” menu (above) and click “Replace” on the provided dialog. This will automatically populate the “Main Email” label into **every** record you just imported. **NOTE:** The “Main Email” is the one that is used for all email correspondence with any contact (you may have additional emails but **only the “Main Email” address will be used for correspondence**).

-- Repeat this same operation for any other phone, fax or emails fields that are in your original file.  
Continue below for CONTRACT & Song CATALOG info...

## ----- CONTRACTS

We understand you may not have a Contract file to import from. So, BEFORE you begin entering your Writer and Publisher "Splits" in the our CATALOG file, a Contract should be created for each writer and each coPublisher you work with. It is not necessary to fill in all of the fields and data in the CONTRACT file, however each writer and publisher needs to have a Contract record for which a Contract # is auto-assigned. During the Song Catalog entry operation, in the next section, it is necessary for each of these contacts to have a bare minimum of one Contract record (can have as many as you wish for each contact) with at least the following data:

CONTRACT	Contract Type	Contract Type	Author, Publisher, Foreign Subpublisher, etc.
CONTRACT	Contract #	Contract #	a unique code imported/auto-generated
CONTRACT	Contract Name	Title of Work/Collection	i.e. "Smith, John - staff writer deal", etc.
CONTRACT	% of ownership	% of ????	the percentage granted in your deal
---other helpful fields (not required but helpful) which may be imported or entered:			
CONTRACT	Date of Contract	Date Signed?	Date Signed
CONTRACT	Date of Reversion	Reversion Date?	Date when your deal is ended
CONTRACT	% CoPubl	% CoPubl	agreed percentage due of co-publishing
CONTRACT	% Points	% Points	agreed % points (artists, producers, etc.)
CONTRACT	Foreign Points %	F. Points %	agreed % due on foreign royalties (artists,prod)
CONTRACT	Territory	Territory	agreed Territory(s) covered by deal (Worldwide

See our HELP documentation regarding the other % fields which are auto-entered for your convenience (this has nothing to do with writer splits; it's simply the percentage of their share they are entitled to).

TIP: The quickest way to enter a new Contract for each applicable Contact is to use the Contract portal layout in your PEOPLE file (see screen capture on next page).



Click in the first field here below the label “Contract 1” (shown above in red) and select the appropriate value from the drop down list. When entering a new record from here it AUTOMATICALLY links you properly with the current contact without having to enter the Contact’s unique code. In addition to the data listed above, enter any other data that you wish to enter (you can always come back later and fill in as much data as you like at anytime. The main thing is establish at least ONE Contract for each person you do business with. This Contract will be assigned to all applicable Songs in the Song CATALOG file from a provided pop-up list (therefore make the Title simple to read and identify). Contracts are important since their data is linked and relied upon for the following: Songs in the CATALOG file, LICENSES, and ROYALTIES. The percentages entered at the Contract level, insure that your monetary calculations are done correctly throughout Songtracker Pro, making your life easier.

NOTE: If there are situations where you have different deal structures with one contact, you will need a separate contract for each deal you make with that person/entity. For example, if you sign one song with a Writer and you get all the publishing; then later you enter into a split-publishing deal with the same Writer for other songs - in this case you would need 2 Contracts with this Writer (or Publisher) to define both percentage deals. NOTE 2: A joint Publisher deal and Writer deal can share the same Contract # for the same entity if desired (or you can create separate Contracts, if you prefer). Once this data has been entered; you may continue on entering your Song Catalog, successfully...

## ----- SONG CATALOG

CATALOG	Catalog #	Catalog Number	required; auto-generated unless available
CATALOG	Song Title	Catalog Title	main name of song
CATALOG	Date of Creation	Date Created?	Date written
CATALOG	Lyrics	Lyric	the Lyric (text) of words
CATALOG	Clearance #	User 5	number used for clearance
CATALOG	Copyright Date	Copyright Date?	Date when title was copyrighted/first published
CATALOG	Copyright #	Copyright #	© Number issued by Library of Congress

NOTE: In CATALOG, click the large “Authors” photo button across the top of the screen. Writers & Publishers may be entered here manually on the “Author/Publisher Portions” layout (shown below) of your CATALOG file (use of this Portal lets you enter pertinent data directly into our PORTIONS file from within CATALOG). A Contact # is key for a successful link; however you MAY import names first, as a way of helpfully assigning these Contact #s on the Author Portions layout (in provided portal). If you decide to Import your data, a SEPARATE Import must be done for each Writer and CoPublisher (or as many as desired to speed your operation along). Whatever data you decide not to import, must be entered manually by assigning each separate Author’s or Publisher’s # to this *Author/Publisher Portions* portal (sometimes manual entry is easier if there are only a few extra writers and publishers on certain songs, etc.).



The screenshot shows a web interface with a navigation bar at the top containing buttons for Contracts, Catalog, Licenses, Royalties, Projects, Versions, Authors, Copyright, and Lyrics. Below the navigation bar is a header for 'Catalog Work # 0001' and a sub-header 'Author/Publisher Portions'. The main content is a table with the following columns: Auth/Publisher, Author/Pub #, Author / CoPublisher, Domestic Auth %, Foreign CoPub %, CoPub %, Contract #, and Foreign Admin %.

Auth/Publisher	Author/Pub #	Author / CoPublisher	Domestic Auth %	Foreign CoPub %	CoPub %	Contract #	Foreign Admin %
Author	A-002	Chris B. Songwriter	50			C-1075	<input type="checkbox"/>
Author	A-003	John B. Gold	50			C-1006	<input type="checkbox"/> 5
Publisher	A-002	Sensitive Music Publishing		25		C-1075	<input type="checkbox"/>
Publisher	A-003	Writer's Friend Music		25		C-1021	<input type="checkbox"/> 5
Publisher	A-004	ABC Publishing Co.		50		C50-0001	<input checked="" type="checkbox"/> 75
Foreign	A-004	ABC Publishing Co.			75	C50-0001	<input checked="" type="checkbox"/> 75
Foreign	96C-104	Peer Southern Publishing			25	C1-0002	<input checked="" type="checkbox"/> 25
							<input type="checkbox"/>

## ----- WRITER & PUBLISHER BREAKDOWNS per Song - PORTIONS

Although you never go to the PORTIONS file to enter data directly; writer & publisher breakdowns entered in the CATALOG file portal automatically get entered into this important file (behind the scenes File). There is only one entry field in this file for the Author's name, So, to Import Writers & Publishers data, you must repeat the following Import for each Writer or Producer field (column) using our PORTIONS file (you MUST have a CATALOG # to import this information successfully - without one, this data will not be linked properly and will not appear correctly). If your text or Excel file has multiple Writer fields for the same song entry, you would need to Import the Catalog # and Writer Name multiple times for each Import. If your data has a Writer/Publisher # field it will make the operation easier. IF NOT, you MUST perform some manual entry on the CATALOG - Author/Publisher Portions layouts to insure accurate data. See the instructions after this field list.

If not entering manually; Import, as many of the following fields as possible:

PORTIONS	Catalog #	Catalog #	unique Song #; required or enter manually
PORTIONS	Writer 1	Author Name L up	name of the writer (Writer records only)
PORTIONS	Publisher 1	CoPublisher Name L up	name of a CoPublisher (Publishers only)
PORTIONS	Nature	Author of	"Words & Music", "Music", "Lyrics", etc.
PORTIONS	Society	Affiliation Lookup	ASCAP, BMI, CCLI, etc.
PORTIONS	Writer %	Writer %	% agreed upon for writer splits
PORTIONS	CoPublisher %	CoPublisher %	% agreed upon for CoPublisher splits
more data fields...			
PORTIONS	Foreign SubPublisher %	Foreign SubPubl %	% agreed upon for Foreign Publisher splits
PORTIONS	Foreign Administrator %	Foreign Administrator %	% agreed pd to Foreign Administrator
PORTIONS	Type of Portion Holder	Author_Publisher?	type of portion holder - specify from our list
PORTIONS	Territory	Territory	agreed upon Territory (i.e. "Worldwide" etc.)
PORTIONS	Contract #	Contract #	unique code specifying related Contract #
(do not auto-enter this value)			
PORTIONS	Writer/Publisher #	Author/Publisher Number	required; unique Contact code; (do Not auto-enter this value)

If you imported this Writer & Publisher data, in most cases, you will need to perform some manual data entry on the CATALOG - Author/Publisher Portions layouts to insure accurate data & unimported data. You may find importing helpful to remind you the Writer and Publisher names and therefore that could be a helpful use of Importing in this PORTIONS

file. However, without Writer/Publisher #s, your data will not be linked in the Songtracker system, correctly. To insure proper linking, you should use the Writer name entry as a reminder and then assign the actual Contact # which will appear in the "Author/Pub #" drop down list. Locate each imported Writer and Producer (on separate lines in this portal) and re-Specify their Contact number. This will insure proper Contact linkage throughout Songtracker. Contract #s **must** also be specified in the provided drop down list, labeled "• Contract #", to insure proper linkage in Songtracker. If Author % breakdowns were not imported properly, be sure to enter them in their proper column on this portal (rollover tutorials are available; see HELP file for more details if necessary).

TIP: Study the sample data that appears on the demo records. This will give you a good idea of what data should be entered and how.

Continue manually entering all of the applicable fields (shown above in this CATALOG portal) to insure your Song Catalog has the breakdowns and splits entered accurately. You will have to decide how much data detail you need. For example, if you track and pay out royalties, you'll need to specify Territory and percentage breakdowns. If you are not responsible for financial aspects of the songs you can enter less data as needed.

We wish you well with these operations. If you have other files of data that require importing please email us about your specific needs so we'll be able to assist you in some way. Thank you.

Working Solutionz Support