Software Update Notes
for the AXIS™ Retail Management System

The AcuSport Retail Technology Group (RTG) provides this document as a high-level overview of the additions, changes, and improvements made to the AXIS™ Retail Management System software with the update to version 2.2.

This update includes the following highlights:

- **PCI Compliance Features**
- **Firearms Features**
- **New Login and Security Features**
- **New Main Menu Features**
- **New Screens and Windows**
- **Updated Screens and Windows**
- **New Reports**
- **Miscellaneous Fixes**
- **Miscellaneous Form 4473 Fixes**
- **New and Updated Procedures**

For assistance with technical issues and questions, contact RTG Support Line at 1-800-547-7120 or **RTGSupport@AcuSport.com**.

General

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Publication Information

Software Update Notes for the AXIS™ Retail Management System Software Version 2.2

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PCI Compliance Features

RTG has integrated the following features to help maintain compliance with PCI standards:

Initial Database Connection Setup

For new installations only: When the AXIS RMS (any application) is opened for the very first time, the system will display the **Database Connection Settings window**. Be sure to complete this setup when applicable. Refer to Log In with the Database Connection Settings Window (see page 26) for more information.

Updated Access Rules

The rules for accessing AXIS applications have been modified to help prevent unauthorized access to the system. Refer to **Password Requirements, Idle Time Limit, and Lock Out Timer** for more information.

Updated User Permissions

Permissions (roles) have been created to allow/restrict access to newly integrated functions. Refer to **New Permissions (Roles) in Security Management** for more information.

Payware Credential Setup, Backup Connection, and Encryption

The **Credit Card Setup screen** allows for the secure entry of payware credentials, including an option for a backup payware connection (URL) to be used in the event the primary URL is unavailable. Refer to Manage Credit Card Processor Credentials (see page 27) for more information.

Credit Card Encryption

The system no longer stores and displays entire credit card numbers for scheduled payments (e.g., recurring membership fees). The system now encrypts credit card information and uses a card's last 4 digits and expiration date to identify it. Refer to **Recurring Membership Status screen** and **Credit Card Information window** for more information.

User Actions Record

The **PCI Audit Log screen** allows the user to identify which employees are making changes to data and system settings. Refer to View the PCI Audit Log (see page 29) for more information.

Firearms Features

RTG has developed the following features to improve firearm tracking and records.

New Serial (Firearm) Types

The following serial types (Type of Firearm) have been added to the system:

- **Any Other Weapon** (NFA)
- **Destructive Device** (NFA)
- **Antique Firearm** (Non-NFA)

These serial types are available in the following locations:

- **Firearm Description window**
- **Bound Book screens**
- **Information for Log # window**

Firearm UPC field

The **UPC** field has been modified to include a drop-down menu in the following firearm-related locations:

- **Firearm Description window**
- **Bound Book screens**
- **Information For Log # window**
- **Import data from Excel screen**
- **Firearm Inventory With Costs screen**

The values in the drop-down menu are established through the **Firearm UPC** screen.

Firearm UPC screen

The **Firearm UPC screen** allows the user to view, add to, and edit the list of firearm UPCs that will be used to populate the UPC drop-down field in select firearm-related locations. Refer to Manage Firearm UPCs (see page 30) for more information on using this screen.

A UPC attached to an unsold firearm may not be edited to non-firearm status

If a UPC has been assigned to an unsold firearm, the **Is Firearm** check box in the UPC's **Product Edit** window may not be unchecked.

New Login and Security Features

Database Connection Settings window

For new installations only: When the AXIS RMS (any application) is opened for the very first time, the system will display the **Database Connection Settings** window.
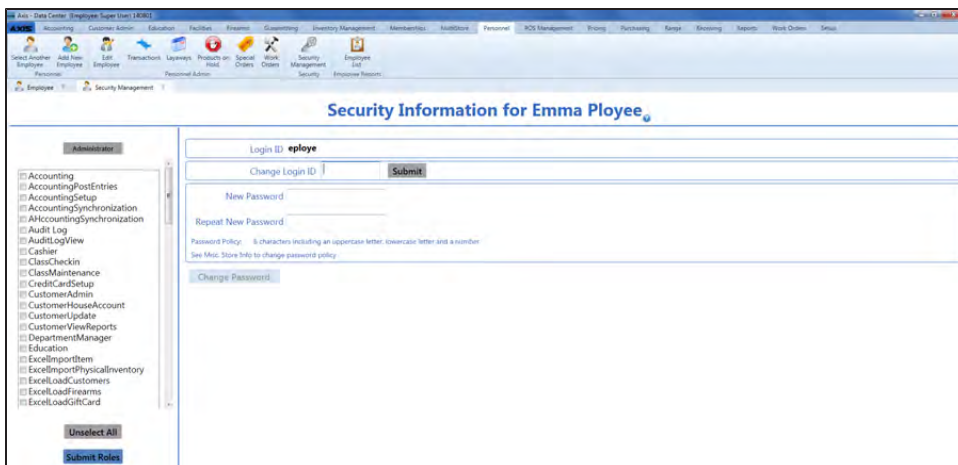
Note: Refer to Log In with the Database Connection Settings Window (see page 26) for more information.

Password Requirements, Idle Time Limit, and Lock Out Timer

The rules for accessing AXIS applications have been modified to help prevent unauthorized access to the system. The following requirements and rules apply to all users (login IDs) who have **AuditLogView** and/or **CreditCardSetup** permissions (including administrative and superuser accounts).

- The user's password must be changed every 90 days. The password must be a minimum of 7 alphanumeric characters in length and contain at least one letter and one number. The 4 most recent passwords may not be reused.
- The user will be automatically logged out if the application is idle for 15 minutes.
- The user will be prevented from logging in for a period of 30 minutes after 6 consecutive failed login attempts. The system records all login attempts (on all machines) in the **PCI Audit Log** and resets the 6-attempt counter to zero with the completion of a successful login or the expiration of the time limit.

New Permissions (Roles) in Security Management

The following permissions have been added to the **Security Information for** screen:

Note: Refer to Manage an Employee's System Credentials (see page 32) for information on using this screen's functions.

Audit Log View Permission

A user must be granted the **AuditLogView** permission to view/use the **PCI Audit Log button** and the **PCI Audit Log screen**.

Credit Card Setup Permission

A user must be granted the **CreditCardSetup** permission to view/use the **CC Setup button** and the **Credit Card Setup screen**.

New Main Menu Features

PCI Audit Log button
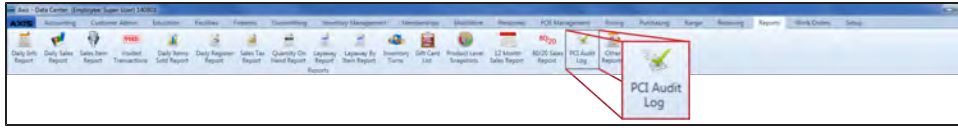
The **PCI Audit Log** button has been added to the **Reports** ribbon. Click this button to display the **PCI Audit Log screen**.

Note: A user must be granted the **AuditLogView permission** to view/use this button.

CC Setup button
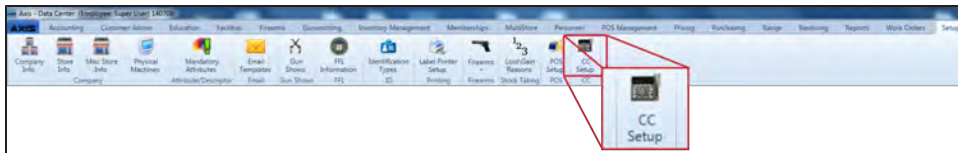
The **CC Setup** button has been added to the **Setup** ribbon. Click this button to display the **Credit Card Setup screen**.

Note: A user must be granted the **CreditCardSetup permission** to view/use this button.

Firearm UPCs option
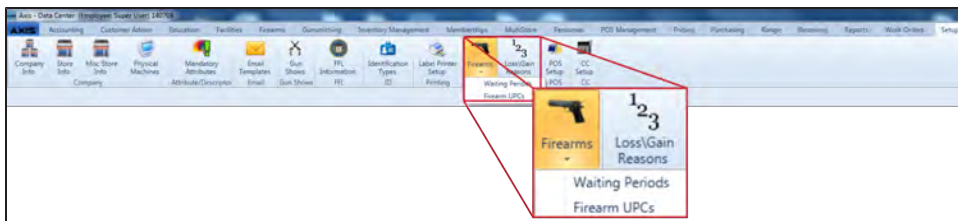
The **Firearm UPCs** option has been added to the menu of options under the **Firearms** option on the **Setup** ribbon. Click this option to display the **Firearm UPC screen**.

New Screens and Windows

PCI Audit Log screen
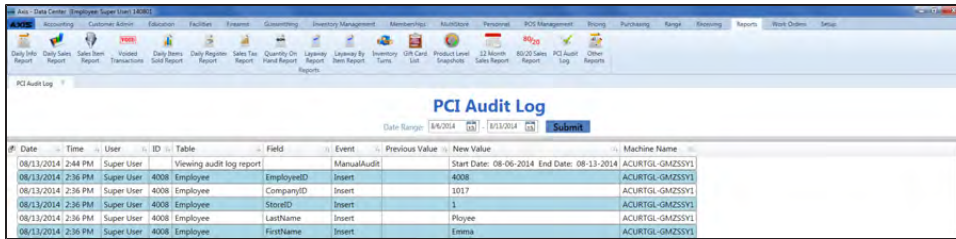
The **PCI Audit Log** screen allows the user to view login attempts, successful logins and logouts, changes made to Security Management settings, views of and changes made to the **Credit Card Setup** screen, and views of the **PCI Audit Log** screen. Select **Reports > PCI Audit Log** from the main menu to display this screen. Refer to View the PCI Audit Log (see page 29) for more information on using this screen.

Note: A user must be granted the **AuditLogView permission** to view/use this screen.

Credit Card Setup screen

The **Credit Card Setup** screen allows the user to select a credit card provider (i.e., Payware) and view or edit the associated configuration settings. Select **Setup > CC Setup** from the main menu to display this screen. Refer to Manage Credit Card Processor Credentials (see page 27) for more information on using this screen.

Note: A user must be granted the **CreditCardSetup permission** to view/use this screen.

Firearm UPC screen
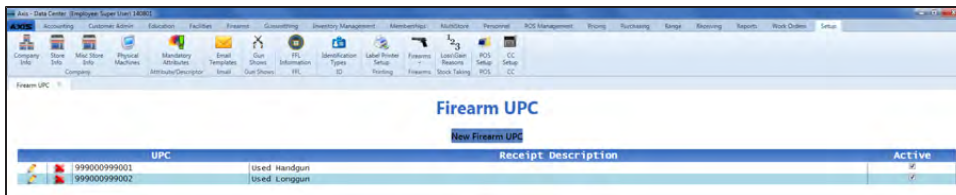
The **Firearm UPC** screen allows the user to view, add to, and edit the list of firearm UPCs that will be used to populate the **UPC drop-down field** in multiple locations. Select **Setup > Firearms > Firearm UPCs** from the main menu to display this screen. Refer to Manage Firearm UPCs (see page 30) for more information on using this screen.

Updated Screens and Windows

Firearm Description window

The **Firearm Description** window has been updated with the following feature(s):

- The **UPC field** field has been updated with drop-down functionality.
- The **Serial Number(s)** field has been modified so multiple serial numbers are entered on separate lines rather than separated by commas.
- The **Type of Firearm** drop-down field includes new **Serial Types**.

Refer to Describe a Firearm (see page 34) for more information on using this window.

Serialized Nonfirearm Description window

The **Serialized Nonfirearm Description** window has been updated with the following feature(s):

- The **Serial Number(s)** field has been modified so multiple serial numbers are entered on separate lines rather than separated by commas.

Refer to Describe a Serialized Non-Firearm Item (see page 36) for more information on using this window.

Bound Book screens

The **Bound Book** screens have been updated with the following feature(s):

- The **Acquisition Date Range** fields have replaced the **Date Range** fields at the top of the Bound Book screens.

  Note: When a screen is first opened, the date fields are blank and the screen displays the entire Bound Book record.

- The **UPC column** (with drop-down functionality) has been added to the NFA and Non-NFA **Bound Book** screens.
- The **Manufacturer #** column has been added to the NFA and Non-NFA **Bound Book** screens.
- The **Type of Action** column (and the **Type** column in a printed Bound Book) includes new **Serial Types** for associated firearms.

Information for Log # window

The **Information for Log #** window has been updated with the following feature(s):

- The **UPC field** has been updated with drop-down functionality.
- The **3310-12** check box has been added to the window.
- The **Type of Firearm** drop-down field includes new **Serial Types**.
- The **Transaction Serial #** field has replaced the **4473#** field in this window.
- The **Print Label** button allows the user to print a single firearm label for the associated log number in the Bound Book.

Import data from Excel screen
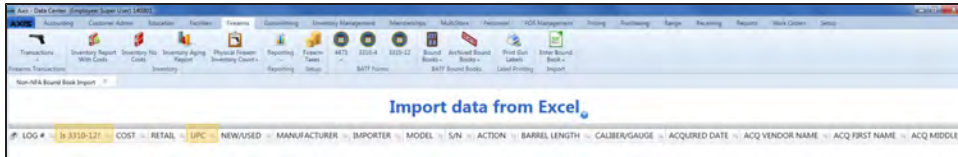
The **Import data from Excel** screen has been updated with the following feature(s):

- The **Is 3310-12** column has been added to the screen (and to the Bound Book Data Import template).
- The **UPC column** column has been updated to accommodate new drop-down functionality.

Firearm Inventory With Costs screen

The **Firearm Inventory With Costs** screen has been updated with the following feature(s):

- The **Firearm UPC** field has been updated with drop-down functionality.

Note: Select **Firearms> Inventory Report With Costs** to display this screen.

Update 4473 Disposition screen

The **Update 4473 Disposition** screen has been updated with the following feature(s):

- The **NICS** field has replaced the **NICS Transaction Number** field on this screen.
- The **Transaction Serial Number** field has replaced the **Transferor's Serial Number** field on this screen.

Note: Select **Firearms > 4473 > Update 4473 Disposition** from the main menu and click a customer's name to display this screen.

Purchase Orders screen
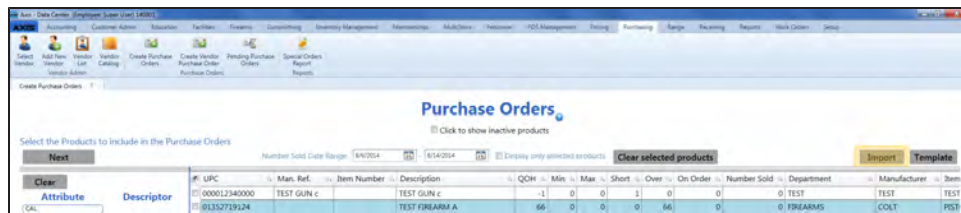
The **Purchase Orders** screen has been updated with the following feature(s):

- The **Import** button allows the user to import purchase order data into the screen by creating, populating, and importing a formatted Excel file. Refer to Import Purchase Order Data (see page 37) for more information on using this feature.

Vendor List screen
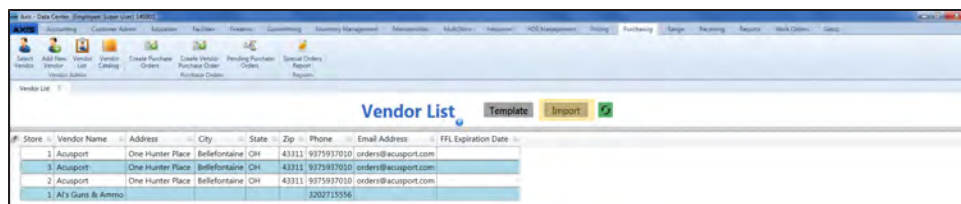
The **Vendor List** screen has been updated with the following feature(s):

- The **Import** button has been added to this screen. This button allows the user to import vendor data into the screen by creating, populating, and importing a formatted Excel file. Refer to Import Vendor Data into the Vendor List (see page 39) for more information on using this feature.

Vendor Look-up window
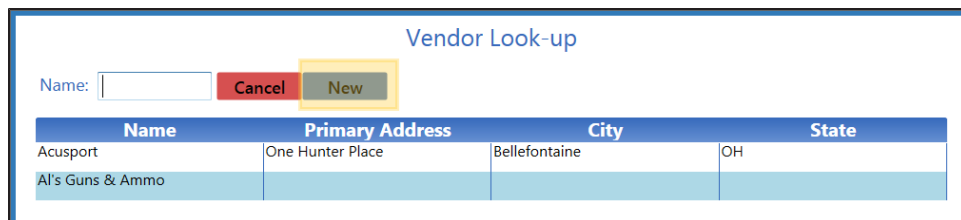
The **Vendor Look-up** screen has been updated with the following feature(s):

- The **New** button allows the user to add a new vendor to the vendor database while documenting an outgoing firearm procedure rather than having to exit the procedure, manually enter the vendor, and then return to the procedure. Refer to Select a Firearm Vendor (see page 40) for more information on using this feature.

Transfer Agent Look-up window
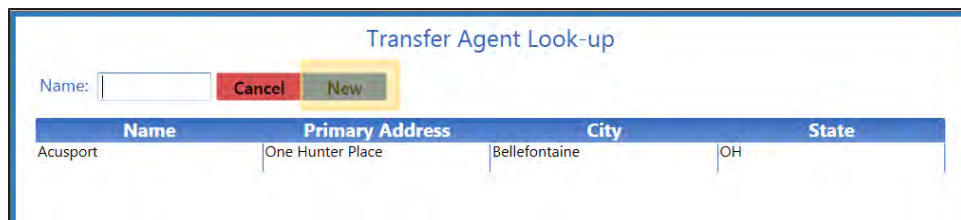
The **Transfer Agent Look-up** screen has been updated with the following feature(s):

- The **New** button allows the user to add a new transfer agent to the vendor database while documenting an outgoing firearm procedure rather than having to exit the procedure, manually enter the vendor, and then return to the procedure. Refer to for more information on using this feature.

Customer Information for screen

The **Customer Information for** screen has been updated with the following feature(s):

- The **County** field allows this information to be entered in and shared between the **AXIS RMS** applications. This field has also been added to the following locations:
  - **Customer Information** window in the **Data Center** application
  - **Customer List screen** in the **Data Center** application
  - **Best Customer List** screen in the **Data Center** application
  - **Member List** screen in the **Data Center** application
  - **Customer Information** tab in the **Register** application
  - **Primary Residence** screen in the **Form 4473** application.

Note: To display this screen, select **Customer Admin > Add New Customer** from the main menu (or select a customer and then select **Customer Admin > Customer Info and Edit** to display an existing customer's screen).

Customer List screen

The **Customer List** screen has been updated with the following feature(s):

- The **County** column has been added to this screen.
- The **Email Type** column has been added to this screen (and to the Customer Data Import template).

  Note: If the **Email Address** field is populated, the **Email Type** field is required. An entry in the **Email Type** field must exactly match one of the defined email types (**Personal**, **Business**, or **Other**).

Note: To display this screen, select **Customer Admin > Customer List** from the main menu.

Recurring Membership Status screen

The **Recurring Membership** screen has been updated with the following feature(s):

- First post-update access only: When the **Recurring Membership Status** screen is opened for the very first time following the software update, the system will display the **Convert Memberships for PCI** window. This window automatically converts existing billing information to records stored with the credit card provider and closes when the conversion is complete.

- The **Last Four** column displays the last four digits of the credit card number associated with the member's recurring payment.

  Note: If this column displays a blank field after the conversion, the system could not convert the member's billing information and a new credit card may be needed to continue. Open the associated **Credit Card Information window** for more information.

Credit Card Information window
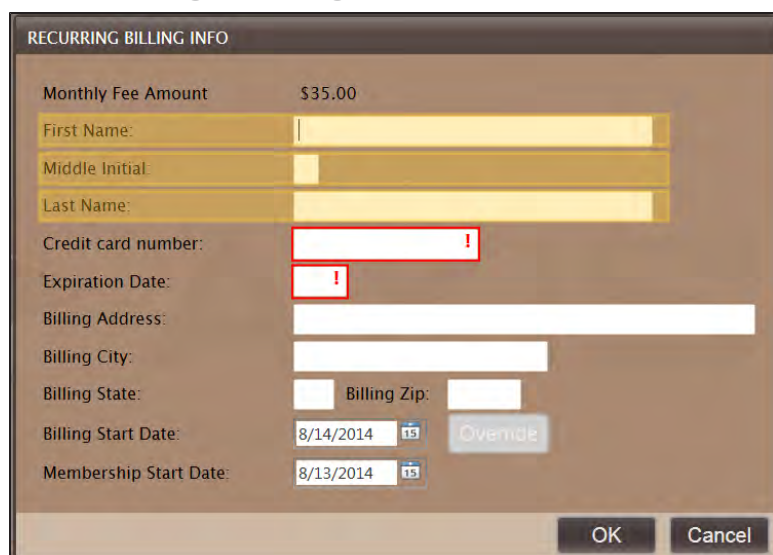
The **Credit Card Information** screen has been updated with the following feature(s):

- The **First Name**, **Middle Initial**, and **Last Name** fields have replaced the **Name as it appears on card** field in this window.

- The **Credit card number** field displays 12 asterisks (*) followed by the last 4 digits of the credit card. To edit the credit card number, (1) click in the field to clear it, (2) enter the new number, and (3) click the **Submit** button.

Note: To display this window, navigate to the **Recurring Membership** screen and click a member's **Edit** button.

Recurring Billing Info window
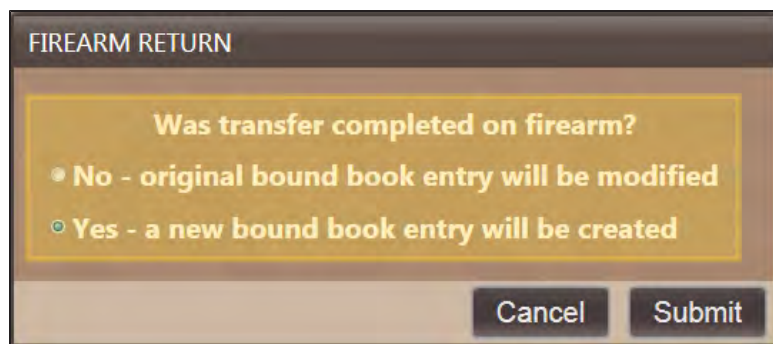
The **Recurring Billing Info** window in the **Register** application has been updated with the following feature (s):

- The **First Name**, **Middle Initial**, and **Last Name** fields have replaced the name field in this window.

Note: To display this window in the **Register** application, sell (register a member for) a membership a with recurring billing.

Firearm Return window

The **Firearm Return** window in the **Register** application has been redesigned to offer a new prompt ("Was transfer completed on firearm?") and allow the user to select one of the following options in response:

- **No - original bound book entry will be modified**
- **Yes - a new bound book entry will be created**

Note: To display this window in the **Register** application, (1) select a customer who previously purchased a firearm, (2) click the **History** tab, (3) click the **Transactions** tab, (4) click a firearm transaction to display its detail record, and (5) double-click the firearm.

New Reports

Waiting Period Report

The **Waiting Period Report** provides a list of every customer who is in a waiting period to receive a firearm, the firearm to be transferred, and the date/time when the waiting period ends.

Refer to View the Waiting Period Report (see page 44) for more information.

Miscellaneous Fixes

Gunsmithing Work Order document has been updated


```
Work Order # 5

From: ARS

To: Hazel Motes
98772 Blood Road
St Cloud MN 56303
(652) 636-8875
jkb@arss.com
                                              7/8/2014 1:33:06 PM

                  ---------- Firearm Information ----------
Manufacturer: ak47
Model: ak47
Serial: 9879
Gauge Caliber: 35
Action: MACHINEGUN

                  ---------- Problem Description ----------
Repair trigger guard
                  ---------- Work Order Detail----------


  Date     Date      Employee   Description                      Price
  Added    Completed


  Total:  $0.00
```

The customer's (primary) **Phone** and **Email** fields have been added to the **Gunsmithing Work Order** document.

Note: To display this document, select **Gunsmithing > Open Work Orders** (or **Gunsmithing > Delivered Work Orders** from the main menu and click a work order's **Print** button.

Inventory Stocktaking Groups can be deleted
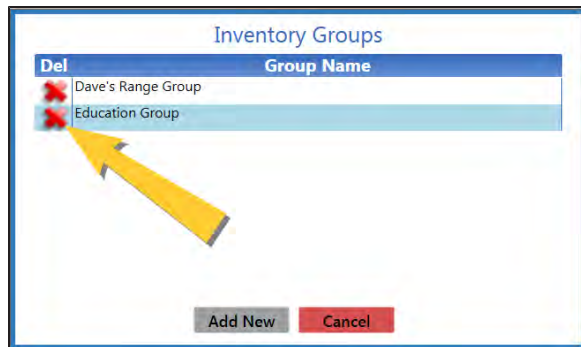
An inventory stocktaking group can be deleted from the **Inventory Groups** window by clicking its **Delete** button if no other users are actively logged into and viewing/using the group. When the button is clicked, the system checks the group for items with total count values and displays a deletion confirmation prompt indicating this status. (When a group is deleted, its items are once again available for inclusion in another group.)

Note: If another user is logged into the group when the button is clicked, the group is locked and the system will display a message indicating the group cannot be deleted and why.

Items can be removed from Inventory Stocktaking Groups
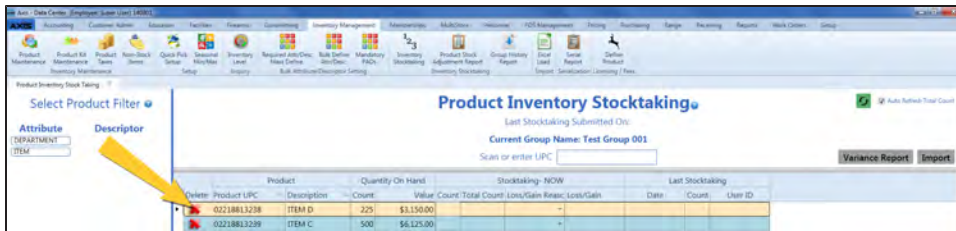
An item in an inventory stocktaking group can be deleted from the **Product Inventory Stocktaking** screen by clicking its **Delete** button. When the button is clicked, the system checks the item for a total count value and displays a deletion confirmation prompt indicating this status. (When an item is deleted from a group, the item is once again available for inclusion in another group.)

Note: If another user is logged into the group and counting the same item when the button is clicked, that user will be presented with a message indicating the item has been deleted.

Note: Previously, clicking an item's button only removed the count entered for the item on the device being used.

Previous QoH column replaces QoH column in the Group History Report

In the **Data Center** application, the **Group History Report** screen provides the **Previous QoH** column to display an item's Quantity on Hand from before the stocktaking occurred.

Note: Previously, the column was named **QoH**.

The Point of Sale Cash Report screen populates despite a drawer having no sales

In the **Data Center** application, the **Point of Sale Cash Report** screen displays results for all cash drawers, even if a drawer did not have any sales.

Note: Previously, the report would not populate if any drawer did not have a sale.

The Sales Item Report calculates Cost correctly

In the **Data Center** application, the **Sales Item Report** screen displays correctly calculated values in the **Cost** column.

Note: Previously, the report could incorrectly calculate **Cost** values.

A Vendor Purchase Order can be created despite having items with zero quantity

In the **Data Center** application, the **Create Purchase Order** screen (for vendor purchase orders) displays the **Create PO** button if any selected item has a quantity of one or more. (If all selected items have zero quantities, the button is not available.)

Note: Previously, the **Create PO** button was not available if any item on the purchase order had a zero quantity.

Miscellaneous Form 4473 Fixes

Last Name field populates with Suffix field value

The **Last Name** field on the **Name & SSN** screen in the **Form 4473** application will populate with the contents of both the **Last Name** field and the **Suffix** field (if present) in a customer's record.

Note: Previously, the contents of the **Suffix** field would not populate the 4473 form.

Last Name field edits may impact the customer record

If an edit is made to the **Last Name** field on the **Name & SSN** screen in the **Form 4473** application and the field does not contain a blank space, the change will be reflected in the customer record in the **Register** and **Data Center** applications. (If the field does contain a blank space, the system will not update the customer record and the user will need to manually update the record as needed.)

Note: Previously, the system did not consider whether the **Last Name** field contained a space and would always update the customer record.

U.S. State field for a military address can be cleared

The **U.S. State** drop-down field in the Active Duty Military section of the **Primary Residence** screen in the **Form 4473** application now includes a blank option to allow the user to clear the field if a state was erroneously selected.

Note: Previously, once a state was entered/selected from the drop-down, the system did not offer a way to return the field to a blank state.

Type column autopopulates on the electronic 4473 form

When a firearm is selected during the updating of an electronic 4473 form, the system retrieves the firearm's serial type from its Bound Book and populates column (question) 29 of the electronic 4473 form with the appropriate mapped value below:

Serial Type value in Bound Book	Type value to populate column 29 on 4473 form
Frame	Frame
Pistol	Pistol
Receiver	Receiver
Revolver	Revolver
Rifle	Rifle
Shotgun	Shotgun
Antique; Any Other Weapon; Combination; Destructive Device; Machine Gun; Other; Pistol Grip Firearm; Short Barrel Rifle; Short Barrel Shotgun; Silencer	Other Firearms

Type of Identification and Number on Identification field edits impact the Bound Book record

If an edit is made to the **Type of Identification** field or the **Number on Identification** field during the updating of an electronic 4473 form, the system reflects the change(s) in the corresponding firearm entry in the appropriate Bound Book

Note: Previously, the system did not update the Bound Book with the change(s).

NICS Transaction Number and Transaction Serial Number field entries for a layaway firearm update Bound Book entries

An entry made in the **NICS Transaction Number** and/or **Transaction Serial Number** field in the **Form 4473** application for a firearm on layaway will be added to the corresponding firearm entry in the appropriate Bound Book.

Note: Previously, the system would not transfer this information into the Bound Book.

New and Updated Procedures

- Log In with the Database Connection Settings Window (see page 26)
- Manage Credit Card Processor Credentials (see page 27)
- View the PCI Audit Log (see page 29)
- Manage Firearm UPCs (see page 30)
- Manage an Employee's System Credentials (see page 32)
- Describe a Firearm (see page 34)
- Describe a Serialized Non-Firearm Item (see page 36)
- Import Purchase Order Data (see page 37)
- Import Vendor Data into the Vendor List (see page 39)
- Select a Firearm Vendor (see page 40)
- Select a Transfer Agent (see page 42)
- View the Waiting Period Report (see page 44)

Log In with the Database Connection Settings Window

Complete the following procedure to configure the AXIS RMS to communicate with the database server.

Note: This procedure is applicable only for <u>new AXIS RMS installations</u> and must be completed the first time any AXIS RMS application is opened.

1. Click the appropriate AXIS application (**Register**, **Data Center**, or **Form 4473**) icon on the desktop to display the **Database Connection Settings** window.

   Note: Some computers may be configured to require a double-click to open an application.

2. Enter the appropriate values in the **Server Name**, **Database Name**, **User Name**, and **Password** fields.
3. Click the **Submit** button to encrypt the data and save the connection string in the configuration file.
4. When the application's login window appears, complete the login procedure.

Manage Credit Card Processor Credentials

1. Navigate to the **Credit Card Setup** screen.

   1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.
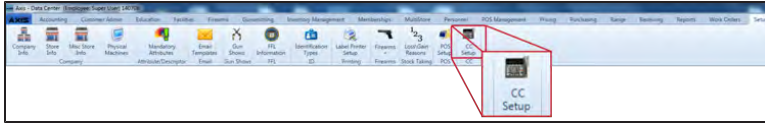
   2. Select **Setup > CC Setup** from the main menu to display the **Credit Card Setup** screen.
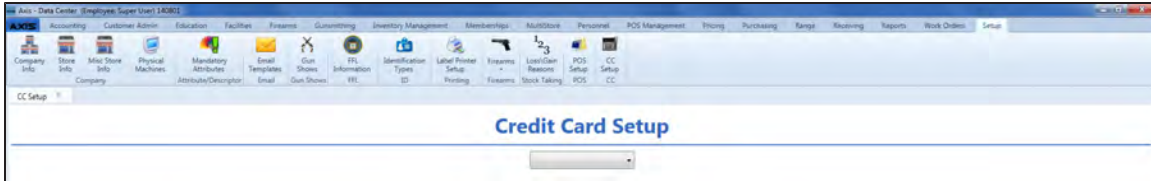
2. Select the appropriate provider (Payware) from the drop-down menu to display a list of data fields.
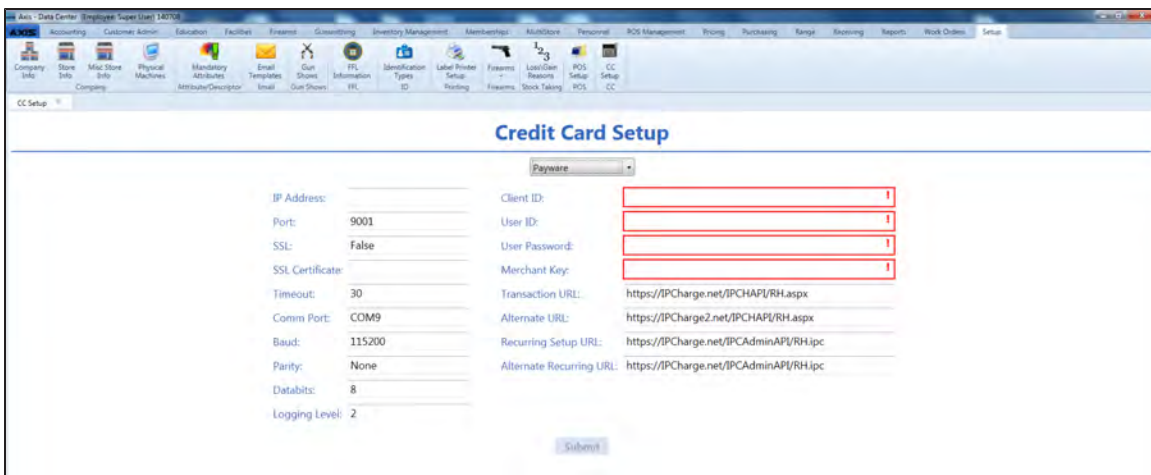
3. Enter/edit provider information in the window.

   Note: Required fields and settings are displayed with red borders. Default settings are provided below.

IPAddress	
Port	9001
SSL	False
SSLCertificate	
Timeout	30
Comm Port	COM9
Baud	115200
Parity	None
Databits	8
Logging Level	2
Client ID	
User ID	
User Password	
Merchant Key	

Transaction URL	https://IPCharge.net/IPCHAPI/RH.aspx
Alternate URL	https://IPCharge2.net/IPCHAPI/RH.aspx
Recurring Setup URL	https://IPCharge.net/IPCAdminAPI/RH.ipc
Alternate Recurring URL	https://IPCharge2.net/IPCAdminAPI/RH.ipc

Note: The **Recurring Setup URL** and **Alternate Recurring URL** are used to set up a customer, set up a contract, and update a customer or contract.

4. Complete the **Client ID**, **User ID**, **User Password**, and **Merchant Key** fields.
5. Click the **Submit** button.

View the PCI Audit Log

1. Navigate to the **PCI Audit Log** screen.

    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.
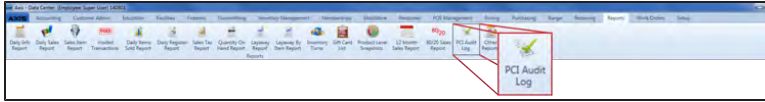
    2. Select **Reports > PCI Audit Log** from the main menu to display the **PCI Audit Log** screen.

    3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display results from that time frame.

        Note: If needed, Sort and Filter Onscreen Data.
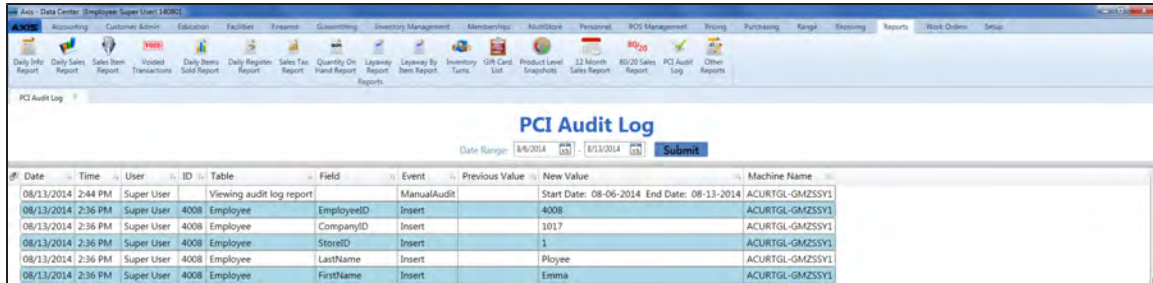
2. Click the tab's **Close** button to close the screen.

Manage Firearm UPCs

1. Navigate to the **Firearm UPC** screen.

    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.
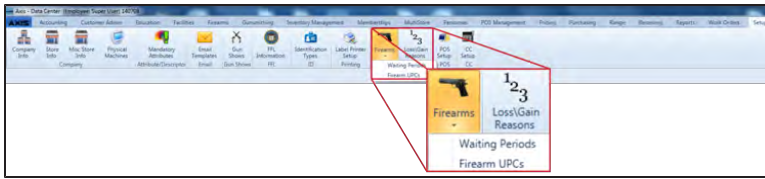
    2. Select **Setup > Firearms > Firearm UPCs** from the main menu to display the **Firearm UPC** screen.
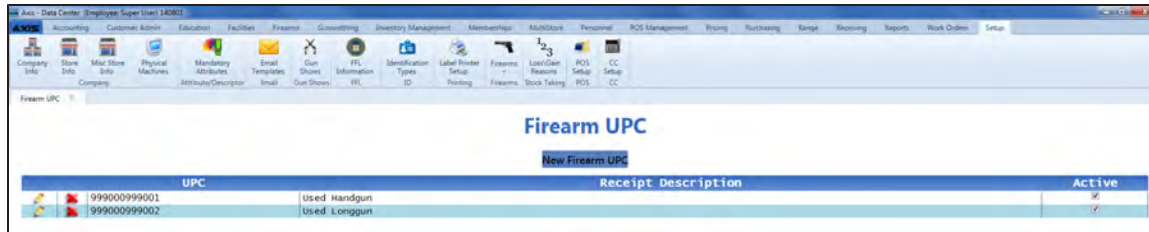
2. Complete the following procedures as needed to manage firearm UPCs:

| **Add** a Firearm UPC	1. Click the **New Firearm UPC** button to display a UPC entry window.
	2. Enter/scan an 18-character alphanumeric UPC in the field.
	3. Click the **Submit** button.
	4. The system checks to see if the UPC already exists in the database:
	• If the UPC is in the database, the system adds it to the list on the **Firearm UPC** screen.
	• If the UPC is not in the database, the system displays the **Product Edit** window.
	Note: The **UPC** field will be populated with the entered UPC and the **Is Firearm** check box will be checked.
	Complete the window's sections to define the UPC.
Edit a Firearm UPC	1. Click a UPC's **Edit** button to display the UPC's **Product Edit** window.
	2. Complete the window's sections to define the UPC.
Deactivate (/Reactivate) a Firearm UPC	Complete the following procedures as needed to manage the firearm UPC's active status:
	• To deactivate the firearm UPC: Uncheck the UPC's **Active** check box to remove it from **UPC** drop-down fields.
	• To reactivate the firearm UPC: Check the UPC's **Active** check box to reinstate it in **UPC** drop-down fields.:

Delete a Firearm UPC

Click a UPC's **Delete** button to remove the UPC from the list on the **Firearm UPC** screen.

Note: Deleting a UPC from this screen will not delete the UPC's Product Maintenance record.

Manage an Employee's System Credentials

1. Select an Employee.
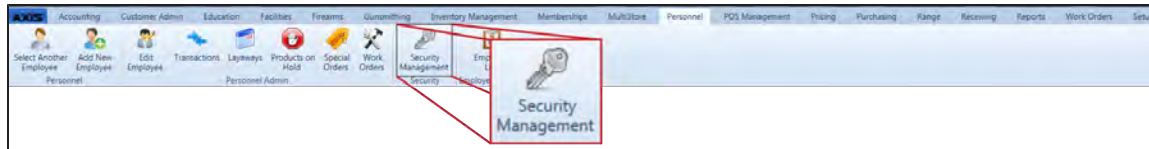
2. Select **Personnel > Security Management** from the main menu to display the employee's **Security Information for** screen.
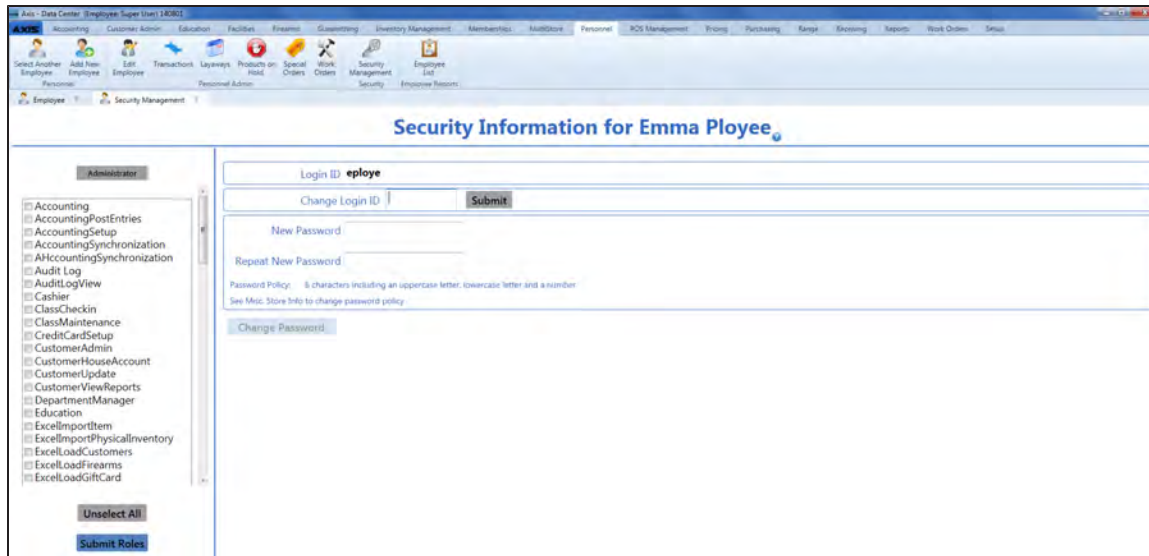
3. Complete the following procedures as needed to manage employee credentials:

Change an **Employee's Login ID**	1. Enter a new login ID in the **Change Login ID** field. 2. Click the **Submit** button to display a change confirmation window. The user login has been changed. OK 3. Click the **OK** button to close the change confirmation window.
Change an **Employee's Password**	1. Enter a new password in the **New Password** field. 2. Enter the new password again in the **Repeat New Password** field. 3. Click the **Change Password** button to display a **Record Saved** confirmation note in the lower left portion of the screen.
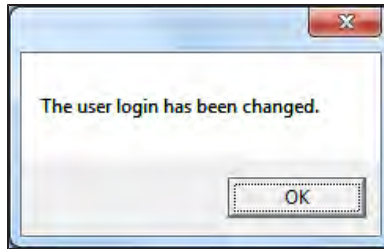
Select Roles **(Permissions) for an Employee**	1. Complete the following procedures as needed to select the desired set of roles for the employee:
	  • Check a role to select it for the employee.
	  • Uncheck a role to deselect it for the employee.
	  • Click the **Administrator** button to select all roles for the employee.
	  • Click the **Unselect** button to deselect all roles for the employee.
	2. Click the **Submit Roles** button to display a **Record Saved** confirmation note in the lower left portion of the screen.

4. Click the tab's **Close** button to close the screen.

Describe a Firearm

1. Navigate to the **Firearm Description** window.

    1. Access one of the following locations in the **Data Center** application as appropriate:

        - **Firearm Purchase screen** (**Add Incoming** button or a firearm's **Edit** button)
        - **Firearm Trade screen** (**Add Incoming** button or an incoming firearm's **Edit** button)
        - **Transfer In screen** (**Add Transfer** button or a firearm's **Edit** button)
        - **Inbound Consignment screen** (**Add Incoming** button or a firearm's **Edit** button)
        - **Firearm Inventory Aging screen** (a firearm's **Edit** button)
        - **Firearm Inventory With Costs screen** (a firearm's **Edit** button)
        - **New Gunsmithing Work Order Screen screen** (**Add Gun** button)
        - **Receive by PO screen** (receive a firearm or a firearm's **Edit** button)
        - **Receive By Invoice screen** (receive a firearm or a firearm's **Edit** button)

    2. Click the indicated button to display the **Firearm Description** window.

2. Enter/edit Firearm information in the window as needed.

> **Note:** Required fields and settings are displayed with red borders. Depending on the situation, some fields may not be present.

UPC	Select the firearm's UPC code from the drop-down menu.
Manufacturer	Select a manufacturer from the drop-down. If the manufacturer is not listed in the drop-down, enter the manufacturer's name in the field to record it for this firearm and add it to the drop-down for selection in the future.
Manufacturer #	Enter the manufacturer's stock order number for the firearm.
Importer	Select an importer (or "NONE" if applicable) from the drop-down. If the importer is not listed in the drop-down, enter the importer's name in the field to record it for this firearm and add it to the drop-down for selection in the future.

Model	**Note:** Be sure to complete the **Manufacturer** field before selecting or entering a model: The drop-down only displays models associated with the selected manufacturer, and a manually entered model will be associated with the selected manufacturer in the future.
	Select a model from the drop-down.
	If the model is not listed in the drop-down, enter the model in the field to record it for this firearm and add it to the drop-down for selection in the future.
Serial Number(s)	Enter (or scan) the firearm's serial number.
	To record multiples of the same firearm, press the **Enter** key between entries/scans of individual serial numbers.
Consignment Fee	Select **Fixed** or **Percentage** to determine how the consignment fee is calculated.
Amount	If the selected **Consignment Fee** is **Fixed**, enter a fixed amount with no dollar sign and two decimal places (0.00) in the **Amount** field.
	If the selected **Consignment Fee** is **Percentage**, enter the percentage amount in the form of a decimal (.2 instead of 20%) in the **Percentage** field.
Barrel Length	Enter a numeric value (e.g., 4.48, 18.5) for the barrel length.
Gauge/Caliber	Enter an alpha-numeric expression (e.g., 9mm, 12GA) for the gauge/caliber.
Type of Firearm	Select the firearm type from the drop-down.
	Note: This selection determines which Bound Book (NFA or Non-NFA) will contain the firearm's record.
Description	Enter a description that summarizes the firearm's recorded specifications or provides additional information about the firearm.
New/Used	Select an option ("New" or "Used") from the drop-down.
	Note: Select **Used** for all consignments.
Condition	Enter a description of the firearm's condition.
Minimum Amount	Enter the minimum amount for which the firearm may be sold.
Inventory Number	The system automatically populates this field.
Cost	Enter the firearm's cost.
	Note: If needed, the cost can be edited in the Bound Book later.
Sales Price	Enter the price for the firearm.
	Note: If no price is entered, a price will have to be entered at the time of sale.
Location	Enter the firearm's physical location in the store/warehouse.
3310-12 Firearm	Check the box if the firearm should be included in 3310-12 calculations and reports.

3. Click the **Submit** button.

Describe a Serialized Non-Firearm Item

1. Use onscreen controls to display the **Serialized Nonfirearm Description** window.

2. Enter Item information in the window as needed.

   Note: Required fields and settings are displayed with red borders. Depending on the situation, some fields may not be present.
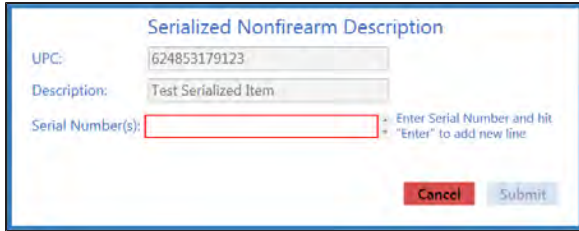
UPC	Enter the product's UPC code.
Description	Enter the item description to be displayed on information screens.
Serial Number(s)	Enter (or scan) the firearm's serial number.
	To record multiples of the same firearm, press the **Enter** key between entries/scans of individual serial numbers.

3. Click the **Submit** button.

Import Purchase Order Data

Complete the following procedure to import purchase order data into the **Purchase Orders** screen by creating, populating, and importing a formatted Excel file.

1. Navigate to the **Purchase Orders** screen.

    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.

    2. Select **Purchasing > Create Purchase Orders** from the main menu to display the **Purchase Orders** screen.

        Note: If needed, Sort and Filter Onscreen Data.

2. Click the **Template** button to export the template format to an Excel file.

3. Populate the Excel file with purchase order information.

    Note: The file must adhere to the validation requirements indicated in row 1 and below:

    - **UPC** and **Quantity** are required fields.

4. Save the Excel file.

5. Click the **Import** button on the **Purchase Orders** screen to display the **Load Excel Import** window.

6. Browse to the desired location.
7. If the system detects any errors, it displays the **Import Complete with Errors** window.

Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
- Click the **Continue** button to continue with the import for the uploaded items.
- Click the **Cancel** button to cancel the import.

8. When the import is complete, the system displays the **Upload Complete** window.

9. Click the **Close** button to close the window.
10. Click the tab's **Close** button to close the screen.

Import Vendor Data into the Vendor List

Complete the following procedure to import vendor data into the **Vendor List** screen by creating, populating, and importing a formatted Excel file.

1. Navigate to the **Vendor List** screen.

    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.

    2. Select **Purchasing > Vendor List** from the main menu to display the **Vendor List** screen.

       Note: If needed, Sort and Filter Onscreen Data.

2. Click the **Template** button to export the template format to an Excel file.
3. Populate the Excel file with vendor information.
4. Save the Excel file.
5. Click the **Import** button on the **Vendor List** screen to display the **Load Excel Import** window.
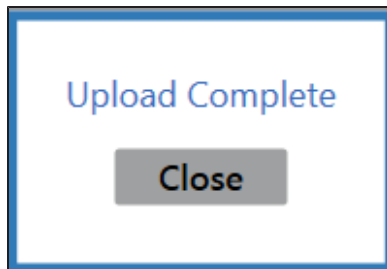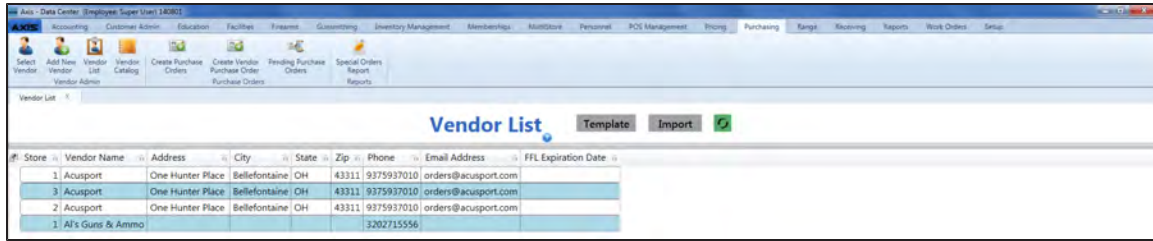6. Browse to the desired location.
7. If the system detects any errors, it displays the **Import Complete with Errors** window.

   Complete any of the following as needed:

   - Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
   - Click the **Continue** button to continue with the import for the uploaded items.
   - Click the **Cancel** button to cancel the import.

8. When the import is complete, the system displays the **Upload Complete** window.
9. Click the **Close** button to close the window.
10. Click the tab's **Close** button to close the screen.

Select a Firearm Vendor

1. Navigate to the **Vendor Look-up** window.

    1. Access one of the following locations in the **Data Center** application as appropriate:
        - **Transfer In screen** (**Select Dealer** button)
        - **Transfer Out screen** (**Select Dealer** button)
        - **Open Work Orders (gunsmithing) screen** (**OK** button in the vendor selection notice window)

    2. Click the indicated button to display the **Vendor Look-up** window.

2. Complete the following procedures as appropriate to identify the transfer agent:

Add a New Vendor	1. Click the **New** button to display a blank **Vendor Information** window.
	2. Continue with the procedure below.
Select an Existing Vendor	1. If needed, enter all or part of the transfer agent's name in the **Name** field to display all matching results.
	2. Double-click a transfer agent name to display the agent's **Vendor Information** window.
	3. Continue with the procedure below.

3. Enter/edit Vendor information in the window as needed.

Vendor Name	Enter the vendor's name.
Address	Enter the first line of the street address.
City	Enter the city.
State	Enter the two-letter abbreviation for the state.
Zip	Enter the ZIP code.
Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Email Address	Enter the entire email address.
FFL Number	Enter the vendor's FFL number.

4. Click the **Submit** button.

Select a Transfer Agent

Note: A transfer agent is a firearm vendor that has been identified with a check mark in the vendor's **Is A Transfer Agent** check box prior to the current transaction.

1. Navigate to the **Transfer Agent Look-up** window.
    1. Access one of the following locations in the **Data Center** application as appropriate:
        - **Firearm Sale screen** (**Transfer Agent** button)
        - **Firearm Trade screen** (**Transfer Agent** button)
        - **Inbound Consignment Return screen** (**Transfer Agent** button)
    2. Click the indicated button to display the **Transfer Agent Look-up** window.

2. Complete the following procedures as appropriate to identify the transfer agent:

Add a New Transfer Agent	1. Click the **New** button to display a blank **Vendor Information** window. 2. Continue with the procedure below.
Select an Existing Transfer Agent	1. If needed, enter all or part of the transfer agent's name in the **Name** field to display all matching results. 2. Double-click a transfer agent name to display the agent's **Vendor Information** window. 3. Continue with the procedure below.

3. Enter/edit Vendor information in the window as needed.

| Vendor Name	Enter the vendor's name.
Address	Enter the first line of the street address.
City	Enter the city.
State	Enter the two-letter abbreviation for the state.
Zip	Enter the ZIP code.
Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Email Address	Enter the entire email address.
FFL Number	Enter the vendor's FFL number.

4. Click the **Submit** button.

View the Waiting Period Report

Complete the following procedure to generate and view a list of every customer who is in a waiting period to receive a firearm, the firearm to be transferred, and the date/time when the waiting period ends.

1. Navigate to the **Report List** screen.

    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.
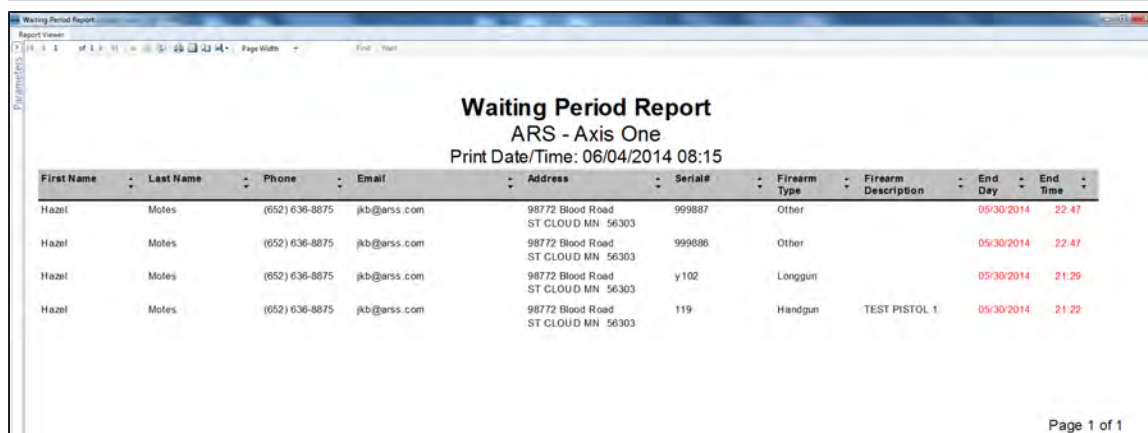

    2. Select **Reports > Other Reports** to display the **Report List** screen.
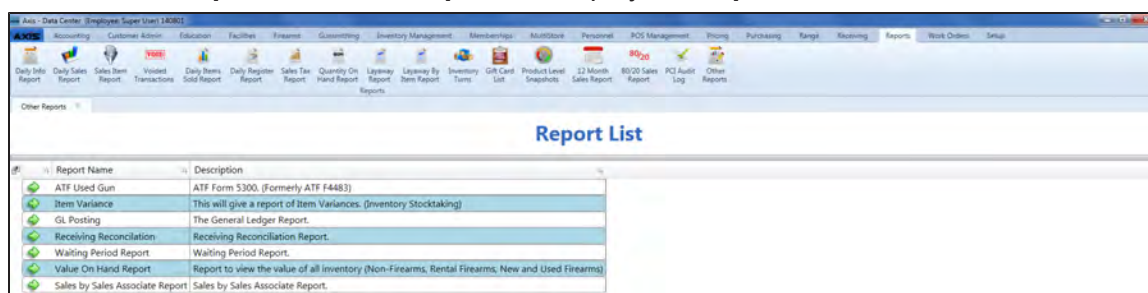
2. Click the **Execute Report** (green arrow) button for the **Waiting Period Report** option to display the report in the **Report Viewer** window.

    Note: If the waiting period has ended, its **End Day** and **End Time** columns will be highlighted in red

3. Complete the following procedure to set parameters for the report:
    1. Click the **Parameters** button to display parameter controls.
    2. Enter/select report criteria in the fields as needed.
    3. Click the **Submit** button.
    4. Click the **Parameters** button to close parameter controls.
4. Use the scroll bar(s) and or page controls as needed to view the entire report.
5. Complete the following procedures as appropriate:

Print the Report	1. Click the **Print** button to display the **Print** window. 2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed. 3. Click the **Print** button to print the document.

Save the Report as an Electronic File

1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.
6. Click the **Close** button to close the **Report Viewer** window.
7. Click the tab's **Close** button to close the screen.