Software Update Notes: Version 2.4

July 2015

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This document provides an overview of the additions, changes, and improvements available in the version 2.4 update to the AXIS™ Retail Management System software, including the following highlights:

- Ribbon Menus (page 4)
- Software Update Feature (page 5)
- Reports (page 5)
- Ordering and Auto Order (page 5)
- Accounting (page 6)
- Case Quantities and Case UPCs (page 6)
- Product Kits (page 6)
- Pricing (page 7)
- Gift Cards (page 8)
- Layaways and Special Orders (page 8)
- Register Application (page 8)

Retail Technology Group

Notices

AXIS™ Software Update Notes: Version 2.4
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Legal Counsel

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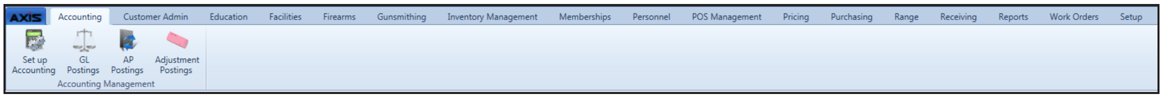
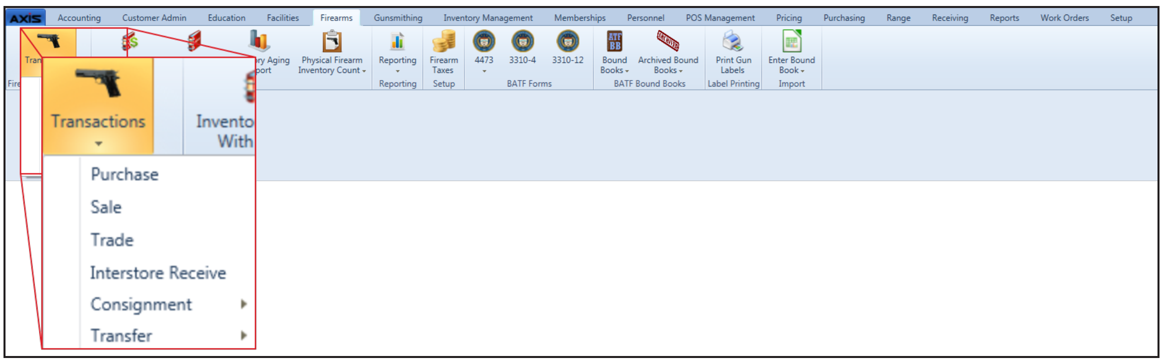
Ribbon Menus

The following modifications have been made to the ribbon menus in the **Data Center** application.

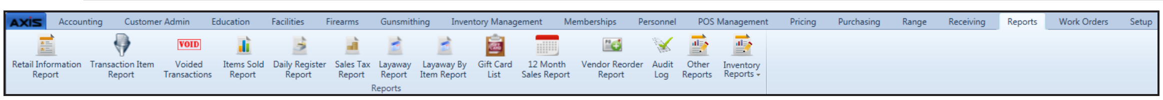


- The **GL Postings** button has replaced the **Post Accounting Entries** button on the **Accounting** ribbon menu. Click this button to display the GL Postings screen (page 36).
- The **AP Postings** button has replaced the **Post AP** button on the **Accounting** ribbon menu. Click this button to display the AP Postings screen (page 35).
- The **Adjustment Postings** button has replaced the **Post Adjustments** button on the **Accounting** ribbon menu. Click this button to display the Adjustment Postings screen (page 37).

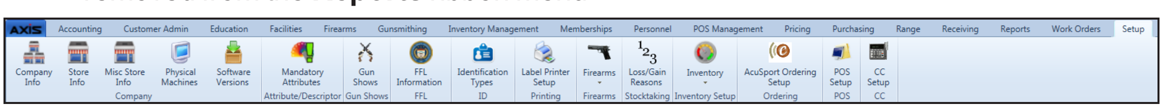


- The **Transactions > Stolen Firearm** option has been removed from the **Firearms** ribbon menu.

Note: If this feature was used previously, contact **RTG Support** for information on reporting missing firearms.



- The **Retail Information Report** button has been added to the **Reports** ribbon menu. Click this button to display the Retail Information Report screen (page 11).
- The **Transaction Item Report** button has been added to the **Reports** ribbon menu. Click this button to display the Transaction Item Report screen (page 12).
- The **Daily Info Report**, **Daily Sales Report**, **Sales Item Report**, **Quantity On Hand Report**, **Inventory Turns Report**, **Product Level Snapshots**, and **80/20 Sales Report** buttons have been removed from the **Reports** ribbon menu.



- The **Software Versions** button has been added to the **Setup** ribbon menu. Click this button to display the Software Versions screen (page 9).
- The **AcuSport Ordering Setup** button has been added to the **Setup** ribbon menu. Click this button to display the AcuSport Ordering Setup screen (page 20).
- The **Email Templates** button has been removed from the **Setup** ribbon menu.

Software Update Feature

The AXIS system now includes a software update feature that automatically downloads the newest version of the software to the server, displays a notice just under the ribbon menu, and allows the user to install the new version from the server to all machines when appropriate. The installation process will temporarily close all AXIS applications on all machines in order to update the software on them. (This feature allows the Retailer to determine when to update to a new version and eliminates the need for RTG Support to remotely access and update the system.) Refer to Install a Software Update (page 10) for more information.

The Software Versions screen (page 9) allows the user to view downloaded versions and select a version for system-wide installation.

Note: The user must be logged in at the server to install a new version.

Reports

- The new Retail Information Report screen (page 11) allows the user to review and print a comprehensive report showing daily transaction counts and total sales amounts for a selected date range. (This screen replaces the **Daily Info Report** screen.)
- The new Transaction Item Report screen (page 12) allows the user to review and print a report showing individual transactions and the item sales associated with each. (This screen replaces the **Sales Item Report** screen.)
- The updated Items Sold Report screen (page 14) allows the user to review and print a report showing sales of items for a selected date range.
- The updated Sales Tax Report screen (page 16) allows the user to review and print a report showing tax types and the sales associated with each.
- The updated Value On Hand Report screen (page 17) includes **Ext Last Cost** (Extended Last Cost), **GP $** (Gross Profit Dollars), and **GP %** (Gross Profit Percentage) columns.
- The **Daily Info Report**, **Daily Sales Report**, **Sales Item Report**, **Quantity On Hand Report**, **Inventory Turns**, **Historic Product Levels**, and **Sales Analysis (80/20) Report** screens have been removed.
- The **GL Posting** and **Sales by Sales Associate** reports have been removed from the Report List screen (page 19).

Note: For more information about using new reports in place of removed reports, download the **AXIS 2.4 Release Reporting Chart**. For more information about the **Retail Information Report**, download the **AXIS Retail Information Report User Guide**.

Ordering and Auto Order

- The new AcuSport Ordering Setup screen (page 20) allows the user to establish a secure, reliable connection between the AXIS system and AcuSport's **AcuOrder Web Service** to take advantage of improved ordering functionality.
- The **AcuSportOrderingSetup** security role has been added to the Security Information for <employee> screen (page 21). This security role controls access to **AcuSport Ordering Setup** features.
- The Pending Purchase Orders screen (page 22) now requires the **Customer Number** field in the vendor record to be populated for all purchase orders submitted through AcuSport.
- The Vendor Information for <vendor> screen (page 23) no longer displays the **Auto Order** checkbox.
- The Product Edit tab (page 27) in the Product Edit window (page 26) now allows an item to be selected for Auto Order even if AcuSport is not the item's vendor (i.e., the item is not in the vendor product cross-reference).

- The AutoOrder feature will not place an order for an item if either of the following is true:
    - The item's **Min** value is 0.
    - The item's **QoH** is a negative value.

Accounting

- The **House Account** drop-down on the Accounting Setup screen (page 33) has been moved out of the **Liability Accounts** section to its own location at the bottom of the screen. The user may set up the House Account as a liability or an asset account.
- The **Lock/Unlock** button has been added to the AP Postings screen (page 35), GL Postings screen (page 36), and Adjustment Postings screen (page 37). This button allows the user to lock a line item to prevent it from posting to the accounting software. The **Type** column allows the user to sort the list according to locked/unlocked status.
- The **Employee** column has been added to the Adjustment Postings screen (page 37).

Case Quantities and Case UPCs

- The Case Quantity screen (page 38) no longer displays an **Edit** button for individual case quantities. (If a quantity needs to be modified, delete the existing case quantity and create a new one. Refer to Delete a Case Quantity (page 39) and Set Up a Case Quantity (page 40) for more information.)
- The Product Inventory Stocktaking screen (page 41) no longer displays case UPCs as items to be counted in an Inventory Count Group. (Case UPCs may still be scanned during a stocktaking procedure to update selling unit UPC counts.)

Product Kits

Product kits have been redesigned to provide more accurate information for inventory management and reporting.

- Following the update to version 2.4, **all existing kits must be reviewed and updated** as needed to meet new product kit standards (below). If a product kit does not meet these standards, the user will not be allowed to select it for sale, layaway, work order, etc. Refer to Update a Product Kit (page 7) for more information.
- The Product Kit Maintenance screen (page 43) has replaced the **Product Kit** screen. This screen allows the user to create, edit, and modify product kits and their contents.

  Note: If a product kit's information is changed through another method (i.e., Non-Stock Items screen (page 47), Excel Import screen (page 48), etc.), the system will not update the kit.
- A product kit may no longer include the following items:
    - Firearms
    - Serialized non-firearms
    - Range use products
    - Licenses
    - Gift Cards
    - Memberships
    - Classes
    - System generated items
    - Other product kits
- A product kit is a non-stock item and does not have a **QoH** or **Committed** value. The sale, commitment (i.e., layaway, etc.), or return of a product kit is reflected in the values for individual kit items.

- A discount applied to a product kit will be proportionally applied to the individual items in the kit.
- The following screens and reports have been modified to reflect changes to product kit design:
  - The Special Order page (page 52) in the **Register** application no longer allows for the selection of product kits.
  - The Product Maintenance screen no longer displays product kits.
  - The Product Tax screen no longer displays product kits.
  - The Product Inventory Stocktaking screen (page 41) no longer displays product kits.
  - The Markup Categories screen no longer allows the selection of product kits.
  - The Non-Stock Items screen (page 47) displays product kits, but it should not be used to modify a kit's information.
  - The Excel Import screen (page 48) should not be used to add a product kit to the database.
  - The Transaction Item Report screen (page 12) and Items Sold Report screen (page 14) display information for individual items rather than kit UPCs.
  - The Retail Information Report screen (page 11) displays sales information for individual items by their department rather than kit UPCs.
  - The Sales Tax Report screen (page 16) displays sales information for the kit UPCs and total taxes for the items they contain.

Update a Product Kit

Complete the following procedure to update existing product kits to meet version 2.4 standards.

Note: If an existing kit is suspended, on layaway, on special order, on a work order, or part of a return when the system software updates, it will be considered a Historical Kit and will function and display as it did prior to the software update (i.e., as a kit rather than individual items). If desired, a suspended kit may be updated to reflect the new standards before it is unsuspended.

1. Navigate to the Product Kit Maintenance screen (page 43).
2. Click a product kit's **Edit** button to display its **Product Edit** window.
3. Edit the kit's **Price** (and other information as needed) to reflect changes that will be made.
4. Click the **Submit** button to update the kit on the **Product Kit Maintenance** screen.
5. Complete the following procedure to update the products included in the kit:
   1. Click the updated kit to display its **Product Kit Items** record.
   2. Remove products that are no longer allowed in product kits.

      Note: Refer to Remove a Product Kit Product (page 44) for more information.
   3. Add additional products and modify each product's **Quantity** as needed.

      Note: Refer to Add and Edit a Product Kit Product (page 45) for more information.
   4. Edit the **Adjusted Retail Price** for each individual product as appropriate to make the total of all **Ext Retail Price** values equal to the **Kit Price** value.

      Note: When the total equals the **Kit Price** value, the **Remaining** value will equal "$0.00."
   5. Click the **Submit** button to display a save confirmation window.
   6. Click the **Close** button to close the window.
6. Repeat as needed for additional product kits.

Pricing

Pricing features have been redesigned to provide greater control over retail price adjustments.

- Following the update to version 2.4, **all split quantity pricing events must be reviewed and updated** as needed to meet new pricing standards (below). If a split quantity pricing event is not updated, the system will not provide a reduced price to the **Register** application.
- Discounts are now entered as positive numbers. (Users no longer need to enter minus symbols when assigning values to percentage and dollar discounts.)
- The Sales Events screen (page 49) now provides three methods (percentage discount, dollar amount discount, and flat price) for defining an item's sales price.
- The Split Quantity Pricing screen (page 50) has replaced the **Split Quantity Events** screen.

Gift Cards

Gift card functionality has been refined and streamlined for better reporting and consistency.

- The system now recognizes a standard Gift Card product with the following characteristics:
  - Its UPC is 6789678967896789. (This number is reserved for the Gift Card product and may not be assigned to another product.)
  - Its **UPC** and **Receipt Description** fields may not be modified.
  - It is an active, non-stock item.
  - It cannot be assigned a tax.
  - It cannot be deleted.
  - It cannot be cloned.
  - Custom gift card products are no longer permitted. No other product may have "Gift Card" in its **Receipt Description** field.
- During the update to version 2.4, the system automatically reviews and revises the product database to standardize gift card offerings:
  - If the standard Gift Card product does not exist in the database, the system creates it.
  - If additional (non-standard) Gift Card products exist, the system modifies each product by removing any ReservedProductIDs, setting it to inactive, and transferring its usage history to the standard Gift Card product.
- When a gift card is redeemed but not completely emptied, the transaction receipt will display the card's remaining balance.

Layaways and Special Orders

- The **Non Taxable Sales** checkbox has replaced the **Tax Exempt** checkbox on the Layaway page (page 51) and the Special Order page (page 52) in the **Register** application.
- Layaway and special order items now display on the initial receipt and on reprints of the receipt.
- The **Select Layaway/Special Order if applicable** drop-down has replaced the **Select layaway if applicable** drop-down on the firearm selection screen that appears during the Process a 4473 Form procedure. When a customer's 4473 form is being processed, his/her layaway and special order firearms may be selected from this drop-down.

Register Application

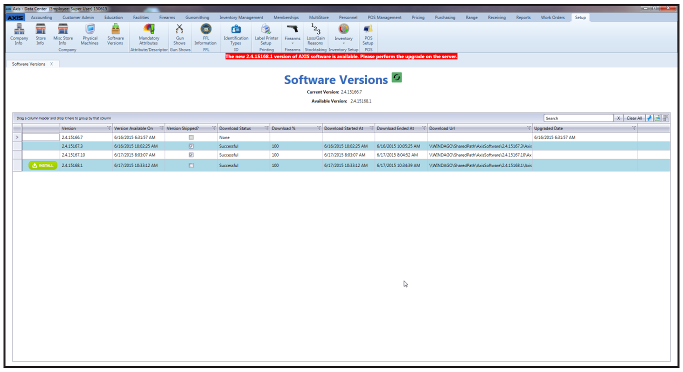
- The **Paid Out** button on the **Cash Register** screen is no longer selectable during an active transaction.

  Note: Payouts distributed via check are not included in reports and do not transfer to the Accounting module.

Software Versions screen

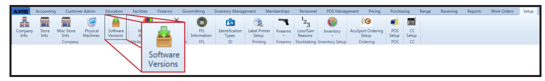
The **Software Versions** screen allows the user to view downloaded versions of system software and select a version for system-wide installation.

Note: The user must be logged in at the server to initiate installation of a new version.



Access

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



2. Select **Setup > Software Versions** from the main menu to display the **Software Versions** screen.

Procedures

- Manage Software Versions

Features

New Version notification message	When this message appears (on any screen), navigate to the **Software Versions** screen to review information about the new version.
Sort and Filter Reporting Screen Data	• Enter a term (string of characters) in the **Search** field to display only records containing that term. • Click the **Clear Search** (**X**) button to undo the **Search** field filter. • Click the **Clear All** button to undo all filters. • Click the **Toggle Filters** button to display filter controls at the tops of the columns. (Click again to hide the controls.) • Click the **Export to Excel (Table)** button to export the data to an Excel file. • Click the **Column Chooser** button to hide or display individual columns.
Install button	Click this button to initiate a system-wide installation of the corresponding software version. **Note:** This button is available only if the user is logged in at the server.
Version Skipped checkbox	Check a version's **Version Skipped** checkbox to hide the corresponding New Version notification message and delay its installation. (Uncheck the checkbox to allow the message to display and the version to be installed.)

Install a Software Update

Complete the following procedure to install a new version of software on all machines in the **AXIS** system.

Note: This procedure may only be initiated from the server.

1. Wait for the new software version to download to the server.

   Note: The Software Versions screen (page 9) allows the user to view the progress and history of software downloads and provides an alternate method for installing new software.

2. Complete the following procedure on the server to install the new software version on all **AXIS** system machines:
   1. If possible, close all **AXIS** workstation applications.

      Note: The system will automatically close all **AXIS** workstation applications during the installation procedure. It may be preferable to manually close these applications prior to installation to give users adequate opportunity to save their work.

   2. Log In to the Data Center Application on the server to display an installation confirmation window.
   3. Click the **Install** button to install the software and close the window.

      Note: The system displays a closure warning message on every active **AXIS** workstation, informing the machine's user that the open **AXIS** application will automatically close in a number of minutes. The user should take this opportunity to save his/her work.

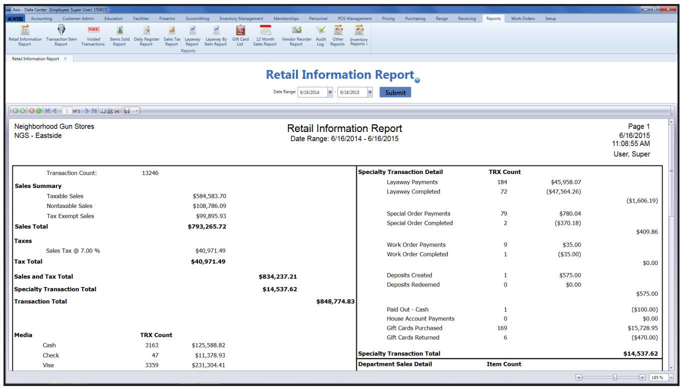
   4. When all machines have been updated, a successful update message window appears on the server screen.
   5. Click the **OK** button to close this window.
3. Complete the following procedure on each **AXIS** system machine:

   Note: This procedure must be performed on every machine that runs **AXIS** software in order to finish the installation process. It may only be completed if the user has **Administrator** rights.

   1. Open the **AXIS** application to display an installation confirmation window.
   2. Click the **Install** button to install the software and close the window.
   3. Log In.

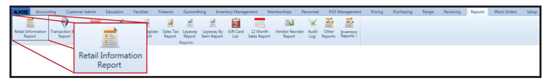
Retail Information Report screen

The **Retail Information Report** screen allows the user to review and print a comprehensive report showing daily transaction counts and total sales amounts for a selected date range.



Access

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



2. Select **Reports > Retail Information Report** from the main menu to display the **Retail Information Report** screen.

Procedures

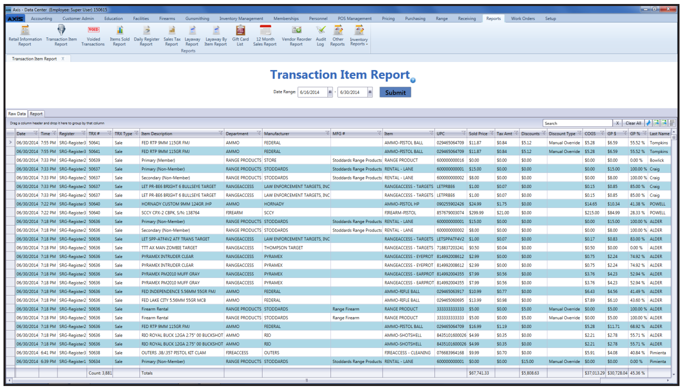
- Use the Retail Information Report

Features

Date Range fields	Enter a starting and ending date to calculate results for the defined time frame. (The fields default to today's date.)
Submit button	Click the **Submit** button to activate the selected list restrictions (**Date Range**).
Report controls	• Click the green **Back** and **Forward** arrow buttons to move through report history. • Click the red **Stop** button to stop historical navigation. • Click the green **Refresh** button to refresh the information on the screen. • Click the blue **First**, **Previous**, **Next**, and **Last** buttons to move through the report's pages. • Click the **Page Setup** button to modify the report's page size, orientation, margins, and source as desired for printing. • Click the **Print Preview** button to display a preview of the printed report. (Click the button again to return to the original view.) • Click the **Print** button to print the report. • Click the **Export** button to display a drop-down menu of export options.

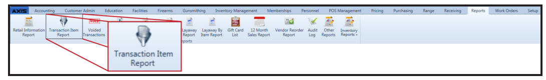
Transaction Item Report screen

The **Transaction Item Report** screen allows the user to review and print a report showing transactions and the item sales associated with each.



Access

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



2. Select **Reports > Transaction Item Report** from the main menu to display the **Transaction Item Report** screen.

Procedures

- [Use the Transaction Item Report]

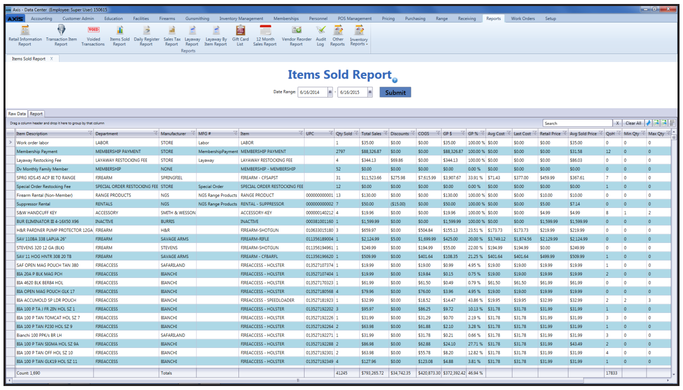
Features

Date Range fields	Enter a starting and ending date to calculate results only for the defined time frame.
Submit button	Click the **Submit** button to activate the selected list restrictions (**Date Range**).
Raw Data and **Report** tabs	• Click the **Raw Data** tab to display a grid that can be filtered, sorted, and grouped. • Click the **Report** tab to display and print a report showing data as filtered, sorted, and grouped on the **Raw Data** tab.
[Sort and Filter Reporting Screen Data]	Use these controls on the **Raw Data** tab as needed to modify the list. • Enter a term (string of characters) in the **Search** field to display only records containing that term. • Click the **Clear Search** (**X**) button to undo the **Search** field filter. • Click the **Clear All** button to undo all filters. • Click the **Toggle Filters** button to display filter controls at the tops of the columns. (Click again to hide the controls.) • Click the **Export to Excel (Table)** button to export the data to an Excel file formatted like the **Raw Data** tab. • Click the **Export to Excel (Custom)** button to export the data to an Excel file formatted like the **Report** tab. • Click the **Column Chooser** button to hide or display individual columns.
Report controls	Use these controls on the **Report** tab as needed to modify the report. • Click the green **Back** and **Forward** arrow buttons to move through report history. • Click the red **Stop** button to stop historical navigation. • Click the green **Refresh** button to refresh the information on the screen. • Click the blue **First**, **Previous**, **Next**, and **Last** buttons to move through the report's pages. • Click the **Page Setup** button to modify the report's page size, orientation, margins, and source as desired for printing.

	• Click the **Print Preview** button to display a preview of the printed report. (Click the button again to return to the original view.) • Click the **Print** button to print the report. • Click the **Export** button to display a drop-down menu of export options.
Report columns	See the Report Columns Index for more information.

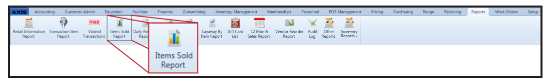
Items Sold Report screen

The **Items Sold Report** screen allows the user to review and print a report showing sales of items for a selected date range.



Access

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



2. Select **Reports > Items Sold Report** from the main menu to display the **Items Sold Report** screen.

Procedures

- Use the Items Sold Report

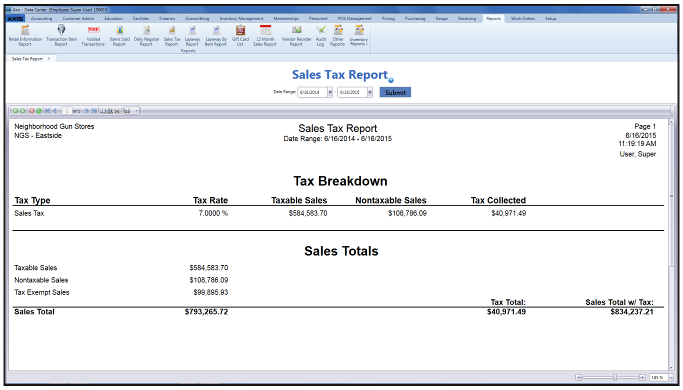
Features

Date Range fields	Enter a starting and ending date to calculate results only for the defined time frame.
Submit button	Click the **Submit** button to activate the selected list restrictions (**Date Range**).
Raw Data and **Report** tabs	• Click the **Raw Data** tab to display a grid that can be filtered, sorted, and grouped. • Click the **Report** tab to display and print a report showing data as filtered, sorted, and grouped on the **Raw Data** tab.
Sort and Filter Reporting Screen Data	Use these controls on the **Raw Data** tab as needed to modify the list. • Enter a term (string of characters) in the **Search** field to display only records containing that term. • Click the **Clear Search** (**X**) button to undo the **Search** field filter. • Click the **Clear All** button to undo all filters. • Click the **Toggle Filters** button to display filter controls at the tops of the columns. (Click again to hide the controls.) • Click the **Export to Excel (Table)** button to export the data to an Excel file formatted like the **Raw Data** tab. • Click the **Export to Excel (Custom)** button to export the data to an Excel file formatted like the **Report** tab. • Click the **Column Chooser** button to hide or display individual columns.
Report controls	Use these controls on the **Report** tab as needed to modify the report. • Click the green **Back** and **Forward** arrow buttons to move through report history. • Click the red **Stop** button to stop historical navigation. • Click the green **Refresh** button to refresh the information on the screen. • Click the blue **First**, **Previous**, **Next**, and **Last** buttons to move through the report's pages. • Click the **Page Setup** button to modify the report's page size, orientation, margins, and source as desired for printing.

	• Click the **Print Preview** button to display a preview of the printed report. (Click the button again to return to the original view.) • Click the **Print** button to print the report. • Click the **Export** button to display a drop-down menu of export options.
Report columns	See the Report Columns Index for more information.

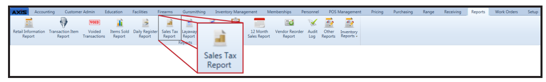
Sales Tax Report screen

The **Sales Tax Report** screen allows the user to review and print a report showing tax types and the sales associated with each.



Access

1. [Log In to the Data Center Application](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Sales Tax Report** from the main menu to display the **Sales Tax Report** screen.

Procedures

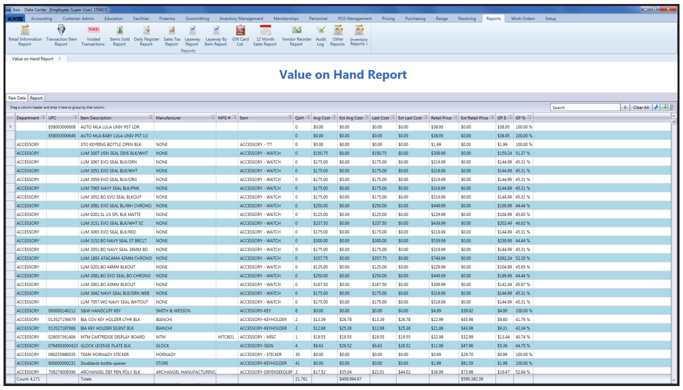
- [Use the Sales Tax Report](#)

Features

Date Range fields	Enter a starting and ending date to calculate results only for the defined time frame.
Submit button	Click the **Submit** button to activate the selected list restrictions (**Date Range**).
Report controls	• Click the green **Back** and **Forward** arrow buttons to move through report history. • Click the red **Stop** button to stop historical navigation. • Click the green **Refresh** button to refresh the information on the screen. • Click the blue **First**, **Previous**, **Next**, and **Last** buttons to move through the report's pages. • Click the **Page Setup** button to modify the report's page size, orientation, margins, and source as desired for printing. • Click the **Print Preview** button to display a preview of the printed report. (Click the button again to return to the original view.) • Click the **Print** button to print the report. • Click the **Export** button to display a drop-down menu of export options.
Report columns	See the [Report Columns Index](#) for more information.

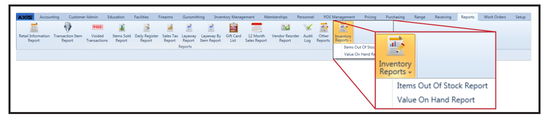
Value On Hand Report screen

The **Value On Hand Report** screen allows the user to review and print a report showing the quantity, total costs, and total value for every item in inventory.



Access

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



2. Select **Reports > Inventory Reports > Value On Hand Report** from the main menu to display the **Value On Hand Report** screen.

Procedures

- Use the Value On Hand Report

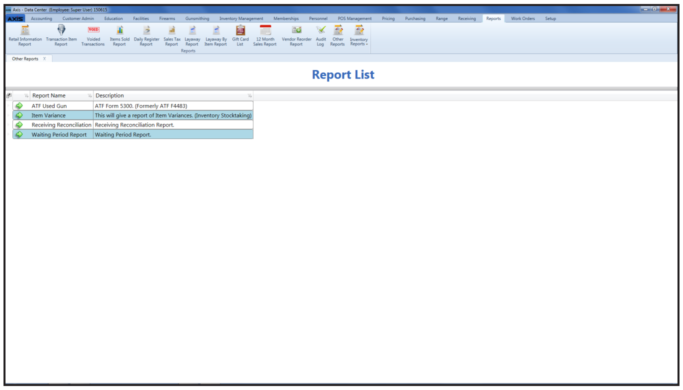
Features

Raw Data and **Report** tabs	• Click the **Raw Data** tab to display a grid that can be filtered, sorted, and grouped. • Click the **Report** tab to display and print a report showing data as filtered, sorted, and grouped on the **Raw Data** tab.
Sort and Filter Reporting Screen Data	Use these controls on the **Raw Data** tab as needed to modify the list. • Enter a term (string of characters) in the **Search** field to display only records containing that term. • Click the **Clear Search** (**X**) button to undo the **Search** field filter. • Click the **Clear All** button to undo all filters. • Click the **Toggle Filters** button to display filter controls at the tops of the columns. (Click again to hide the controls.) • Click the **Export to Excel (Table)** button to export the data to an Excel file formatted like the **Raw Data** tab. • Click the **Column Chooser** button to hide or display individual columns.
Report controls	Use these controls on the **Report** tab as needed to modify the report. • Click the green **Back** and **Forward** arrow buttons to move through report history. • Click the red **Stop** button to stop historical navigation. • Click the green **Refresh** button to refresh the information on the screen. • Click the blue **First**, **Previous**, **Next**, and **Last** buttons to move through the report's pages. • Click the **Page Setup** button to modify the report's page size, orientation, margins, and source as desired for printing. • Click the **Print Preview** button to display a preview of the printed report. (Click the button again to return to the original view.) • Click the **Print** button to print the report.

	• Click the **Export** button to display a drop-down menu of export options.
Report columns	See the Report Columns Index for more information.

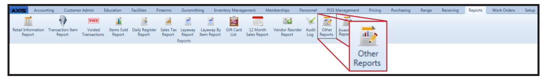
Report List screen

The **Report List** screen allows the user to access, review, and print a variety of reports.



Access

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



2. Select **Reports > Other Reports** from the main menu to display the **Report List** screen.

Procedures

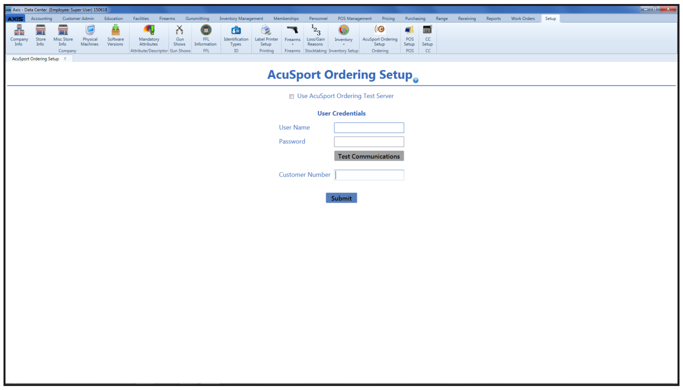
- View the ATF Used Gun Report
- View the Item Variance Report
- View the Receiving Reconciliation Report
- View the Waiting Period Report

Features

Execute Report (green arrow) button	Click a report's **Execute Report** (green arrow) button to display the report in the **Report Viewer** window.
Report Viewer Window controls	• Click the **Parameters** button to set report parameters. • Click the **Print** button to print the report. • Click the **Export** button to save the report as an electronic file.

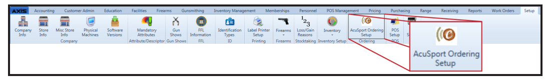
AcuSport Ordering Setup screen

The **AcuSport Ordering Setup** screen allows the user to establish a secure, reliable connection between the AXIS system and AcuSport's **AcuOrder Web Service**.



Access

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



2. Select **Setup > AcuSport Ordering Setup** from the main menu to display the **AcuSport Ordering Setup** screen.

Note: A user must be granted the **AcuSportOrderingSetup** security role to use this feature.

Procedures

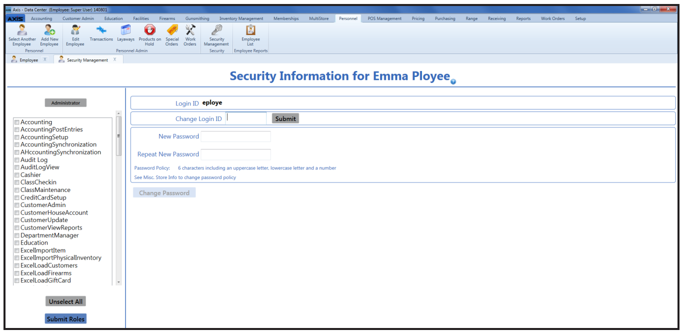
- Set Up AcuSport Ordering

Features

Use AcuSport Ordering Test Server checkbox	Check the checkbox to send credentials to a test server rather than to the actual, live AcuOrder server. Uncheck the box to send credentials to the actual, live AcuOrder server.
User Name field	Enter the store's user name (available from AcuSport) in the **User Name** field.
Password field	Enter the store's password (available from AcuSport) in the **Password** field.
Test Communications button	Click the **Test Communications** button to verify credentials and test the connection to the selected (test or actual) server.
Customer Number field	Enter the store's customer number from the **Customer #** field in the AcuSport vendor record.
Submit button	Click the **Submit** button to submit credentials to the selected server.

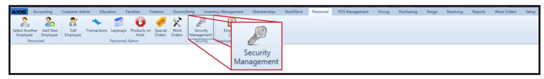
Security Information for <employee> screen

The **Security Information for <employee>** screen allows the user to manage an employee's login ID, password, and security roles.



Access

1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.
2. Select an Employee.



3. Select **Personnel > Security Management** from the main menu to display the employee's **Security Information for <employee>** screen.

Procedures

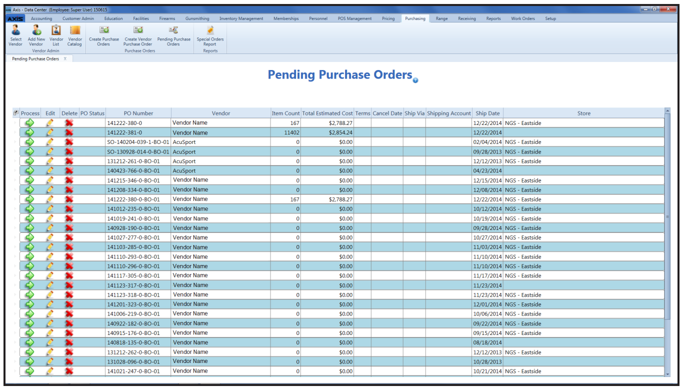
- Manage an Employee's System Credentials
- Modify an Employee's Login ID
- Modify an Employee's Password
- Select an Employee's Security Roles

Features

Security Roles	Check a security role (permission) to assign it to the selected employee and give him/her the ability to view and use the associated feature. Uncheck a role to revoke the permission. Refer to Select an Employee's Security Roles for more information.
Login ID field	This field displays the employee's current login ID.
Change Login ID field	Enter a new login ID in this field and click the **Submit** button to modify an employee's login ID. Refer to Modify an Employee's Login ID for more information.
New Password field	Enter a new password in this field, enter the new password in the **Repeat New Password** field, and click the **Change Password** button to modify an employee's password. Refer to Modify an Employee's Password for more information.

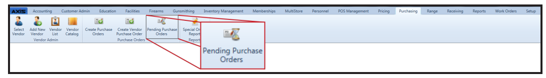
Pending Purchase Orders screen

The **Pending Purchase Orders** screen allows the user to review, modify, and process a pending purchase order.



Access

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



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

Procedures

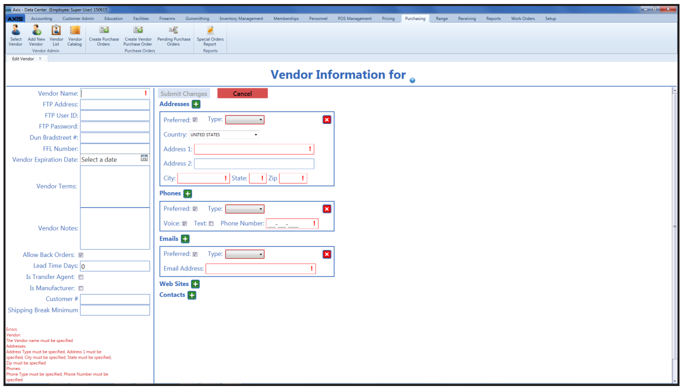
- Manage a Pending Purchase Order
- Modify a Pending Purchase Order
- Process a Pending Purchase Order
- Delete a Pending Purchase Order

Features

Click to show inactive products checkbox	Check the **Click to show inactive products** checkbox to display all active and inactive products. Uncheck the checkbox to display only active products.
Process button	Click a purchase order's **Process** button to process it. Refer to Process a Pending Purchase Order for more information.
Edit button	Click a purchase order's **Edit** button to modify it. Refer to Modify a Pending Purchase Order for more information.
Delete button	Click a purchase order's **Delete** button to delete it. Refer to Delete a Pending Purchase Order for more information.

Vendor Information for <vendor> screen

The **Vendor Information for <vendor>** screen allows the user to create and modify a vendor record.



Access

1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.
2. Complete one of the following procedures as appropriate to display the **Vendor Information for <vendor>** screen:
   - Select **Purchasing > Add New Vendor** from the main menu to create a new vendor record.
   - Select **Purchasing > Select Vendor** from the main menu and Select a Vendor to modify an existing vendor record.

Procedures

- Create a Vendor Record
- Modify a Vendor Record
- Manage Vendor Contacts

Features

Vendor Information fields

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

Vendor Name	Enter the vendor's name.
FTP Address	Enter the vendor's FTP address.
FTP User ID	Enter the vendor's FTP user name.
FTP Password	Enter the vendor's FTP password.
Dun Bradstreet #	Enter the vendor's Dun Bradstreet number.
FFL Number	Enter the vendor's FFL number.
Vendor Expiration Date	Enter the vendor's expiration date (mm/dd/yyyy) or Select a Date with the calendar button.
Vendor Terms	Enter the vendor's terms.
Vendor Notes	Enter notes about the vendor.
Allow Back Orders	If the vendor accepts back orders, check the checkbox.
Lead Time Days	Enter the number of days needed to process an order before shipping.
Is Transfer Agent	If the vendor is a transfer agent, check the checkbox.
Is Manufacturer	If the vendor is a manufacturer, check the checkbox.
Customer #	Enter the vendor's customer number.
Shipping Break Minimum	Enter the vendor's shipping break minimum.

Addresses	If an address record is not needed, click its **Close** (red **X**) button to close it. If an additional address record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this address record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.
	Zip	Enter the ZIP code.
Phones	If a phone record is not needed, click its **Close** (red **X**) button to close it. If an additional phone record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails	If an email record is not needed, click its **Close** (red **X**) button to close it. If an additional email record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.
Web Sites	If a website record is not needed, click its **Close** (red **X**) button to close it. If an additional website record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this website record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	URL Address	Enter the website's URL address.
Contacts	If a contact record is not needed, click its **Close** (red **X**) button to delete it. If an additional contact record is needed, click the **Add** (green **+**) button to open a blank **Contact Information** window. To view or edit an existing contact record, click the record's **View** button to display the contact's **Contact Information** window. **Note:** Refer to Manage Vendor Contacts for more information.	

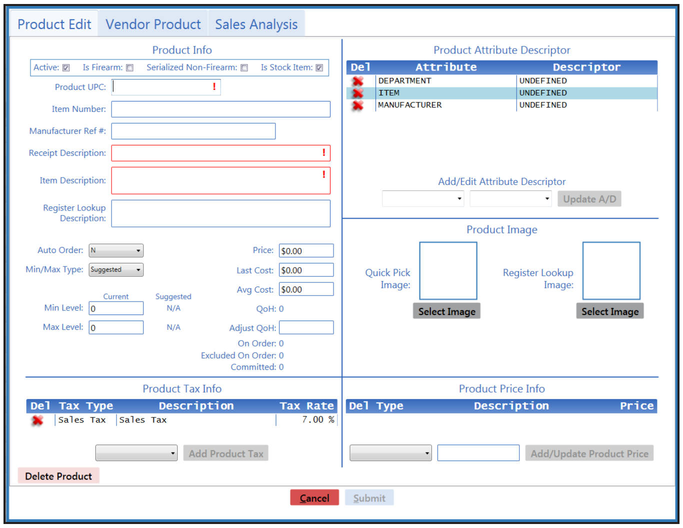
Contact Information fields:

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

First	Enter the contact's first name.	
Last	Enter the contact's last name.	
Title	Enter the contact's title.	
Addresses	If an address record is not needed, click its **Close** (red **X**) button to close it. If an additional address record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this address record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.
	Zip	Enter the ZIP code.
Phones	If a phone record is not needed, click its **Close** (red **X**) button to close it. If an additional phone record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails	If an email record is not needed, click its **Close** (red **X**) button to close it. If an additional email record is needed, click the **Add** (green **+**) button to open it.	
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.

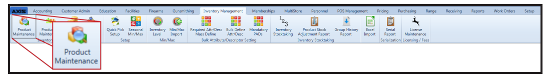
Product Edit window

The **Product Edit** window allows the user to define a product's characteristics, control inventory and ordering levels; set receiving options; and review and utilize sales analytics.



Access

1. [Log In to the Data Center Application](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.
3. Complete one of the following procedures as appropriate to display the **Product Edit** window.
   - Click the **Add Product** button to create a new product record.
   - Check a product's checkbox and click the **Clone Product** button to create a new product record based on the selected product.
   - Check a product's checkbox and click the **Edit Product** button to modify an existing product record.

Procedures

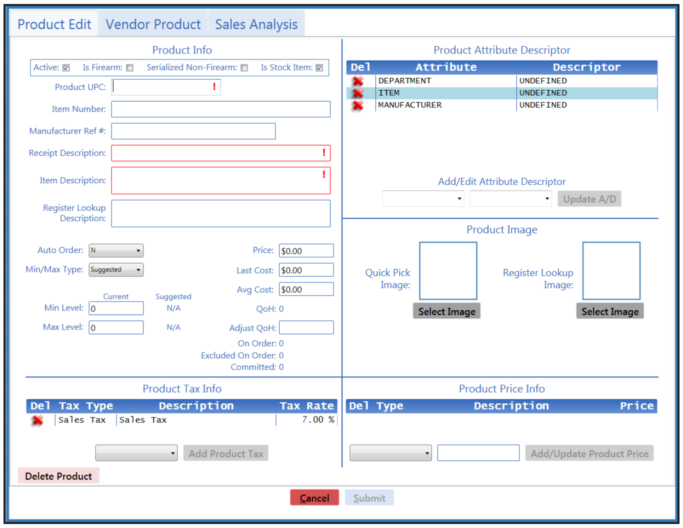
- Create and Maintain a Product
- Adjust Lead Time
- Modify Min/Max Levels

Features

Product Edit tab (page 27)	The **Product Edit** tab allows the user to define a product's characteristics and values.
Vendor Product tab (page 30)	The **Vendor Product** tab allows the user to manage a product's vendor product detail record and control the behavior of its Vendor Product Detail window.
Sales Analysis tab (page 31)	The **Sales Analysis** tab allows the user to review an item's sales data and set its min/max values.

Product Edit tab

The **Product Edit** tab allows the user to define a product's characteristics and values.



Access

If necessary, click the **Product Edit** tab to display it.

Procedures

- Create and Maintain a Product

Features

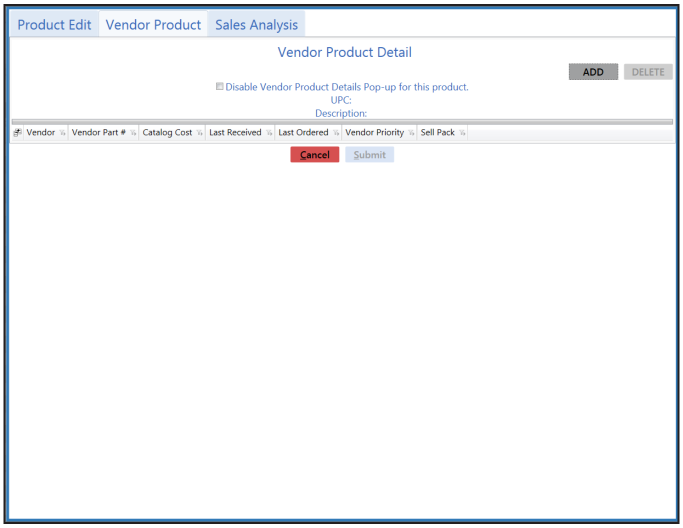
Product Info section	Complete the appropriate fields and settings:.
Note: Required fields and settings are displayed with red borders.	
Active	Check the checkbox to mark the item as active and make it available for search and selection in the **Register** application.
Is Firearm	Check the checkbox to mark the item as a firearm.
Serialized Non-Firearm	Check the checkbox to mark the item as a serial non-firearm and require a serial number to receive or sell it.
Is Stock Item	Check the checkbox to mark the item as a physical item that can be inventoried and sold.
Product UPC	Enter the product's UPC code.
Manufacturer Ref #	Enter the manufacturer’s stock number for the item.
Receipt Description	Enter a concise item description (30 characters maximum) to be shown on labels and customer receipts.
Item Description	Enter a lengthy item description (80 characters maximum) to be shown on information screens in the **Register** application. **Note:** If an item has been automatically added to the system by a vendor, a description beginning with "AUTO" displays in this field. Feel free to remove the "AUTO" and modify the description as needed.
Register Lookup Description	This field automatically populates for AcuSport items. The field may be left blank for Non-AcuSport items.
Auto Order	• Select **A** (automatic) to let the system automatically order the item to maintain inventory levels (as defined by the **Min Level** and **Max Level** values). • Select **N** (normal) to retain standard ordering procedures for this item. **Note:** The Auto Order feature is available only to AcuSport Exchange retailers.
Min/Max Type	Select a min/max type (**Suggested**, **Manual**, or **Automatic**) to modify the product's **Min/Max Type** designation on the **Inventory Level** screen.

Current Min Level	Enter/edit a value to modify the product's **Current Min** value on the **Inventory Level** screen. If the item's inventory level drops below the minimum, the system can calculate the number of items needed to restock the item to the **Max Level** value. For example, after a big sale, an item having a **Min Level** of 3 and a **Max Level** of 10 has only 2 items remaining in inventory. The system recognizes that inventory is below the minimum level and calculates that 8 (10-2) need to be ordered to bring the item inventory to the maximum level. **Note:** If an item's **Min Level** is set to 0, the Auto Order feature will not order it. If **Auto Order** is activated for the item, the system automatically recognizes these shortages and orders items accordingly. Min/Max calculations are also used to generate suggested ordering quantities when manually creating a vendor-specific purchase order. Refer to Create a Vendor Purchase Order for more information.
Current Max Level	Enter/edit a value to modify the product's **Current Max** value on the **Inventory Level** screen.
Suggested Min Level	The field displays the product's **Suggested Min** value as shown on the **Inventory Level** screen.
Suggested Max Level	The field displays the product's **Suggested Max** value as shown on the **Inventory Level** screen.
Price	Enter/edit the standard price for the item as needed. **Note:** If no price is entered, the item will ring up for $0.00 in the **Register** application.
Last Cost	Edit the last cost for the item as needed.
Avg Cost	Edit the average cost for the item as needed.
QoH	The field displays the product's quantity on hand.
Adjust QoH	Edit the quantity on hand for the item as needed. **Note:** The **Adjust QoH** field should not be used with firearms or serialized nonfirearm items. **Note:** If an item's **QoH** is a negative number, the Auto Order feature will not order it.
On Order	The field displays the quantity of the product that is on order.
Excluded On Order	The field displays the quantity of the product that is on order but is not included in QoH calculations.
Committed	The field displays the quantity of the product that has been committed for use outside of inventory (i.e., reserved for a customer, designated a rental item, etc.).
Product Tax Info section	Select the appropriate tax for the item from the drop-down field and click the **Add Product Tax** button to add a tax.
Product Attribute Descriptor section	Select an attribute from the first **Add/Edit Attribute Descriptor** drop-down field, select a descriptor from the second **Add/Edit Attribute Descriptor** drop-down field, and click the **Update A/D** button to add the selected attribute/descriptor combination to the item.
Product Image section	Click the **Select Image** button under the **Quick Pick Image** (or **Register Lookup Image**) field and select an image to accompany the item on the **Quick**

	Picks (or **Register Lookup**) screen.
Product Price Info section	Select a price type from the drop-down field, enter a price in the second field, and click the **Add/Update Product Price** button to add the price to the item.

Vendor Product tab

The **Vendor Product** tab allows the user to manage a product's vendor product detail record and control the behavior of its Vendor Product Detail window.



Access

If necessary, click the **Vendor Product** tab to display it.

Procedures

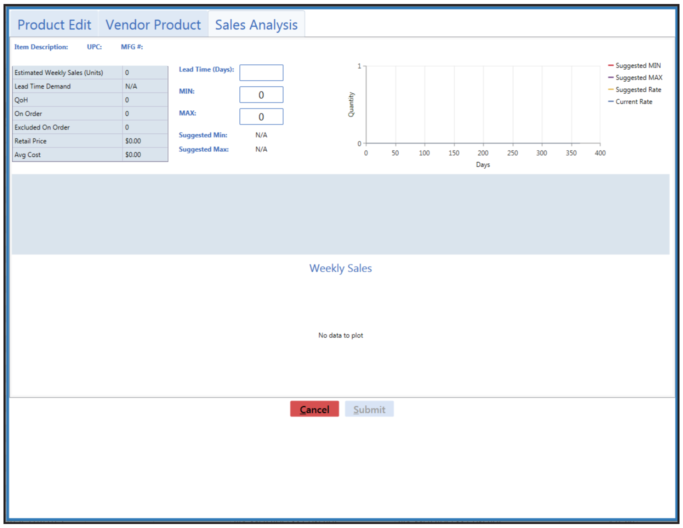
- Add a Vendor Product Detail Record for this UPC
- Delete a Vendor Product Detail Record for this UPC
- Control the Behavior of this UPC's Vendor Product Detail Window

Features

Disable Vendor Product Details Pop-up for this product checkbox	Check the checkbox to prevent the UPC's **Vendor Product Details** window from displaying in the future. Uncheck the checkbox to allow the window to display in the future.
Add button	Click the **Add** button, populate the **Vendor Product Detail** window, and click the **Submit** button to create a vendor part number for the product
Delete button	Select a **Vendor Product Detail** and click the **Delete** button to remove the record.

Sales Analysis tab

The **Sales Analysis** tab allows the user to review an item's sales data and set its min/max values.



Access

If necessary, click the **Sales Analysis** tab to display it.

Procedures

- Display Case UPC or Unit UPC Data
- Adjust Lead Time
- Modify Min/Max Levels

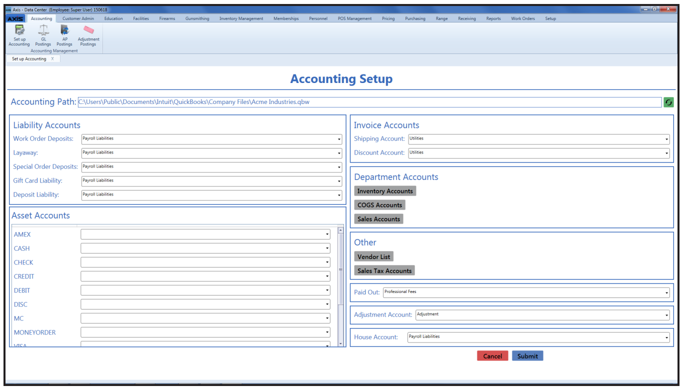
Features

Case UPC and **Unit UPC** fields	If the item is a unit UPC associated with a case UPC, the **Case UPC** field is displayed. The user may click the **Case UPC** field to display the case UPC's **Sales Analysis** tab. If the item is a case UPC associated with a unit UPC, the **Unit UPC** field is displayed. The user may click the **Unit UPC** field to display the unit UPC's **Sales Analysis** tab.
Calculation Data section	The **Calculation Data** section includes the **Estimated Weekly Sales (Units)**, **Lead Time Demand**, **QoH**, **On Order**, **Excluded On Order**, **Retail Price**, and **Avg Cost** fields. Some of these fields may be edited on the Product Edit tab (page 27).
Lead Time (Days) field	The **Lead Time (Days)** field reflects the value displayed in the **Lead Time Days** field on the vendor's **Vendor Information for** screen. The user may temporarily adjust this value on this tab to display its effect on calculations, but it can only be permanently changed on the vendor's **Vendor Information for** screen. Refer to Set Up and Maintain a Vendor Record for more information.
MIN and **MAX** fields	The **MIN** and **MAX** fields reflect the item's current minimum and maximum values (respectively). They may be edited on this tab.
Suggested Min and **Suggested Max** fields	The **Suggested Min** and **Suggested Max** fields reflect the suggested minimum and maximum values (respectively). The system calculates these values according to the item's lead time, lead time demand, safety stock percentage, relative weekly weights, and estimated weekly sales. **Note:** If an item does not have 8 weeks of sales data or the item was out of stock for more than 50% of the 8-week period, the suggested values will be "0." If the **Lead Time Days** field is not populated, the suggested values will be "N/A."
Saw Tooth Graph section	The **Saw Tooth Graph** section presents a graphic representation of comparative inventory levels over the past year. This graph allows the user to identify how changes to min/max levels can help avoid overstock and out of stock situations.
8-Week Sales Data section	The **8-Week Sales Data** section includes the **Weight**, **Sales Units**, **Sales Dollars**, **Days Out Of Stock**, **Weekly Average Sales (Units)**, **Lost Sales**

	(Units), **Lost Sales (Dollars)**, **COGS**, **GP%**, and **GP$** fields. **Note:** The **Days Out Of Stock**, **Lost Sales (Units)**, and **Lost Sales (Dollars)** fields display values for items that go out of stock after the system software is updated. Values are not calculated for items that are or were out of stock prior to the update.
Weekly Sales section	The **Weekly Sales** section presents a graphic representation of weekly sales over a 52-week period. The user may hover over a week's red diamond to display data from that week.

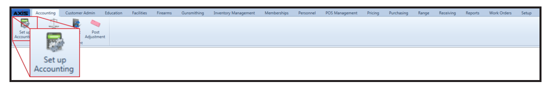
Accounting Setup screen

The **Accounting Setup** screen allows the user to establish links between the Accounting Module and associated QuickBooks accounts and locations.



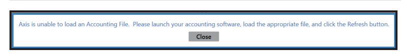
Access

1. If it is open, close the **Data Center** application.
2. Make sure all other users are logged out of the QuickBooks application.
3. Log in to the QuickBooks application with Administrator rights.
4. Log In to the Data Center Application to display the **Data Center Main Menu** screen.



5. Select **Accounting > Set Up Accounting** from the main menu to display the **Accounting Setup** screen and an error message.

   Note: If this message appears during initial setup, it may be ignored. If it appears during a subsequent procedure, check the QuickBooks program to make sure it is open and there are no other users.



6. Click the **Close** button to close the window.

Procedures

- Set Up Accounting Links and Features

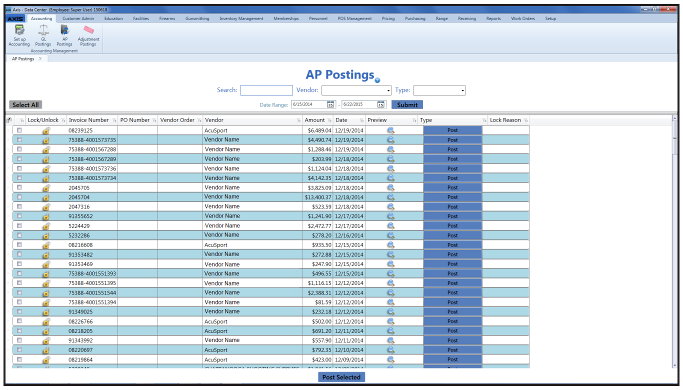
Features

Accounting Path field	If necessary, click the **Refresh** button to allow the system to determine the path to the accounting software.
Liability Accounts section	For each account, select the corresponding QuickBooks account from the associated drop-down field.
Asset Accounts section	For each account, select the corresponding QuickBooks account from the associated drop-down field.
Invoice Accounts section	For each account, select the corresponding QuickBooks account from the associated drop-down field.
Department Accounts section	Click the buttons to link QuickBooks Inventory accounts, Cost of Goods Sold accounts, and Sales accounts to Departments.
Other section	Click the buttons to link Vendor accounts to vendors and Tax accounts to tax types.

Paid Out drop-down	Select the QuickBooks account for payouts from the drop-down.
Adjustment Account drop-down	Select the QuickBooks account for adjustments from the drop-down.
House Account drop-down	Select the QuickBooks account (asset or liability) for house accounts from the drop-down.

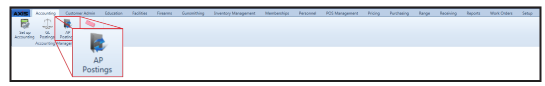
AP Postings screen

The **AP Postings** screen allows the user to post accounts payable invoices to the accounting (QuickBooks) software.



Access

1. If it is open, close the **Data Center** application.
2. Make sure all other users are logged out of the QuickBooks application.
3. Log in to the QuickBooks application with Administrator rights.
4. Log In to the Data Center Application to display the **Data Center Main Menu** screen.



5. Select **Accounting > AP Postings** from the main menu to display the **AP Postings** screen.

Procedures

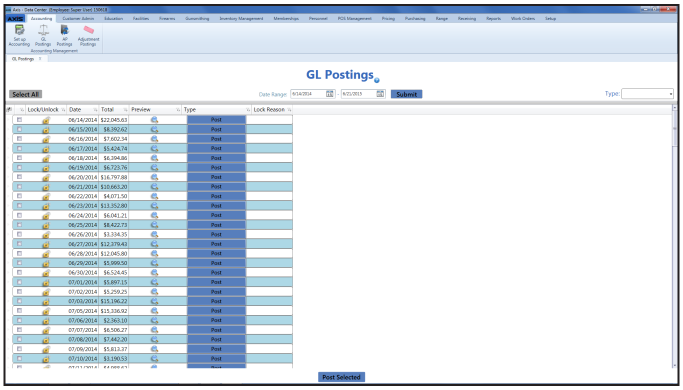
- Post Accounts Payable Invoices to the Accounting Software

Features

Search field	Enter a search term (string of characters) to display only invoices containing that string in the list.
Vendor drop-down	Select a vendor from the drop-down to display only invoices from the selected vendor in the list.
Type drop-down	Select a type (status) from the drop-down to display only invoices having that type (status) in the list.
Date Range fields	Enter a starting and ending date to display only invoices from the defined time frame in the list.
Submit button	Click the **Submit** button to activate the selected list restrictions (**Search**, **Vendor**, **Type**, and **Date Range**).
Preview button	Click an invoice's **Preview** button to view a preview of the invoice in a separate window.
Post button	Click an invoice's **Post** button to post the invoice to the accounting software.
Lock button	Click an invoice's **Lock** button to prevent it from being posted to the accounting software. Click the invoice's **Unlock** button to remove this protection.
Post Selected button	Click the **Post Selected** button to post the selected invoice(s) to the accounting software.

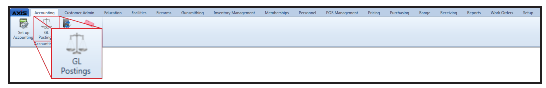
GL Postings screen

The **GL Postings** screen allows the user to post general ledger entries to the accounting (QuickBooks) software.



Access

1. If it is open, close the **Data Center** application.
2. Make sure all other users are logged out of the QuickBooks application.
3. Log in to the QuickBooks application with Administrator rights.
4. Log In to the Data Center Application to display the **Data Center Main Menu** screen.



5. Select **Accounting > GL Postings** from the main menu to display the **GL Postings** screen.

Procedures

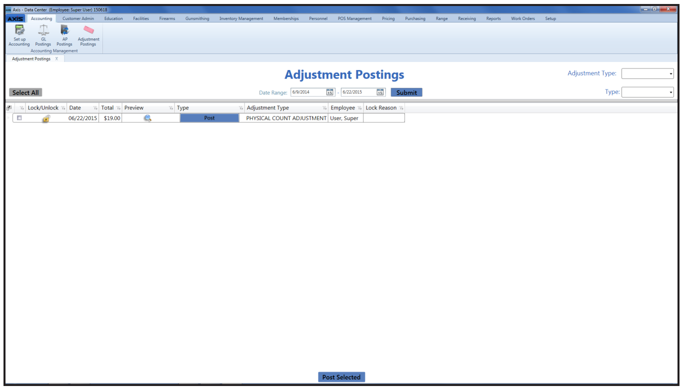
- Post Accounting Entries to the Accounting Software

Features

Date Range fields	Enter a starting and ending date to display only entries from the defined time frame in the list.
Type drop-down	Select a type (status) from the drop-down to display only entries having that type (status) in the list.
Submit button	Click the **Submit** button to activate the selected list restrictions (**Date Range** and **Type**).
Preview button	Click an entry's **Preview** button to view a preview of the entry in a separate window.
Post button	Click an entry's **Post** button to post the entry to the accounting software.
Lock button	Click an entry's **Lock** button to prevent it from being posted to the accounting software. Click the entry's **Unlock** button to remove this protection.
Post Selected button	Click the **Post Selected** button to post the selected entry(ies) to the accounting software.

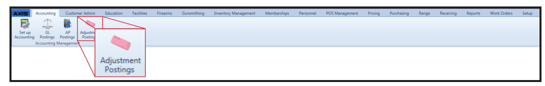
Adjustment Postings screen

The **Adjustment Postings** screen allows the user to review inventory adjustments and post them to the accounting (QuickBooks) software.



Access

1. If it is open, close the **Data Center** application.
2. Make sure all other users are logged out of the QuickBooks application.
3. Log in to the QuickBooks application with Administrator rights.
4. Log In to the Data Center Application to display the **Data Center Main Menu** screen.



5. Select **Accounting > Adjustment Postings** from the main menu to display the **Adjustment Postings** screen.

Procedures

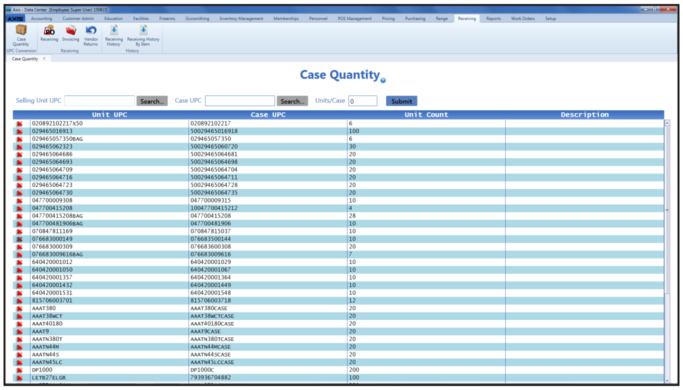
- Post Inventory Adjustments to the Accounting Software

Features

Date Range fields	Enter a starting and ending date to display only adjustments from the defined time frame in the list.
Adjustment Type drop-down	Select an adjustment type from the drop-down to display only adjustments having that adjustment type in the list.
Type drop-down	Select a type (status) from the drop-down to display only adjustments having that type (status) in the list.
Submit button	Click the **Submit** button to activate the selected list restrictions (**Date Range**, **Adjustment Type**, and **Type**).
Preview button	Click an adjustment's **Preview** button to view a preview of the adjustment in a separate window.
Post button	Click an adjustment's **Post** button to post the adjustment to the accounting software.
Lock button	Click an adjustment's **Lock** button to prevent it from being posted to the accounting software. Click the adjustment's **Unlock** button to remove this protection.
Post Selected button	Click the **Post Selected** button to post the selected adjustment(s) to the accounting software.

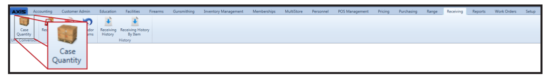
Case Quantity screen

The **Case Quantity** screen allows the user to establish a relationship between a single item (selling unit UPC) and a case or multi-pack (case UPC) of the same item and to define the number of items in the case.



Access

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



2. Select **Receiving > Case Quantity** from the main menu to display the **Case Quantity** screen.

Procedures

- Set Up a Case Quantity (page 40)
- Delete a Case Quantity (page 39)

Features

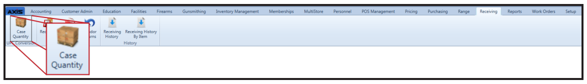
Selling Unit UPC field	Click the **Search** button beside the field to select the selling unit UPC (typically a single item).
Case UPC field	Click the **Search** button beside the field to select the case UPC (typically a case or multi-pack item).
Units/Case field	Enter the number of units per case in the **Units/Case** field.
Submit button	Click the **Submit** button to add the case quantity to the list.
Delete button	Click a case quantity's **Delete** button to remove it from the list.

Delete a Case Quantity

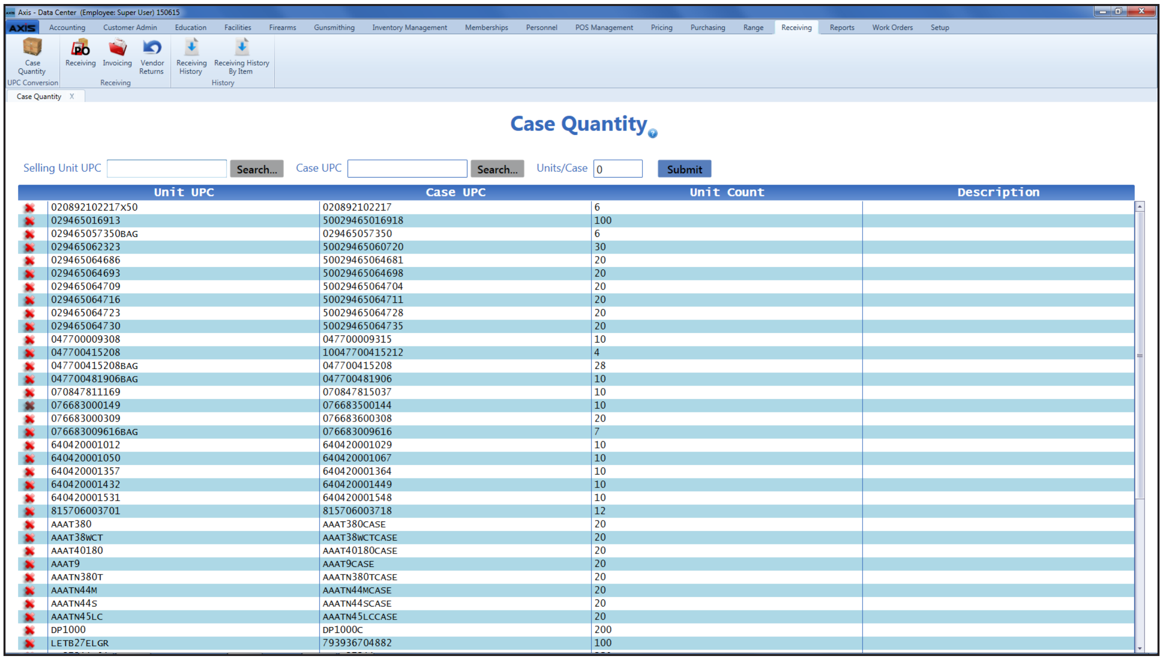
Complete the following procedure to delete a case quantity.

Note: A case quantity may not be deleted if an item associated with it is included in a physical inventory stocktaking count group.

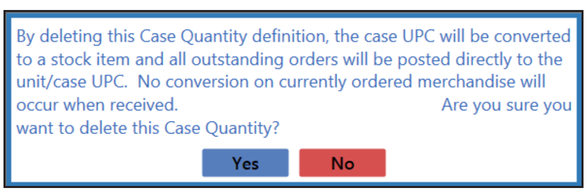
1. Navigate to the **Case Quantity** screen.
    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.

    2. Select **Receiving > Case Quantity** from the main menu to display the **Case Quantity** screen.



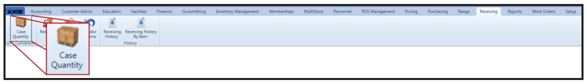
2. Click a case quantity's **Delete** button to display a deletion confirmation window.



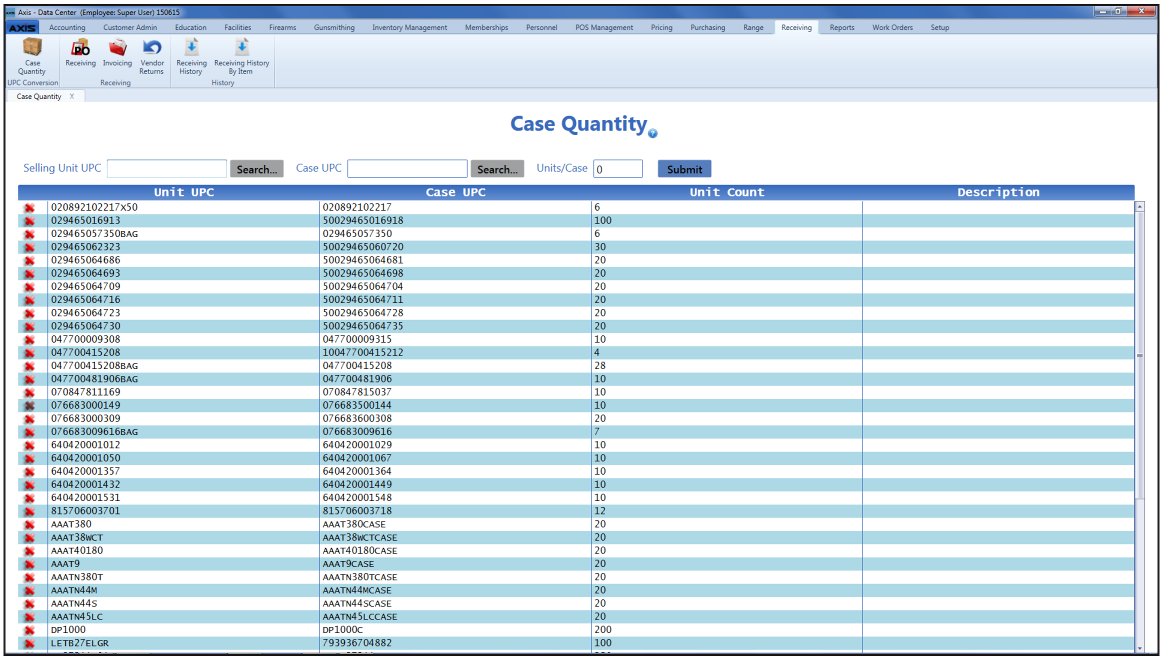
3. Click the **Yes** button to remove the case quantity from the screen.
4. Click the tab's **Close** button to close the screen.

Set Up a Case Quantity

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



    2. Select **Receiving > Case Quantity** from the main menu to display the **Case Quantity** screen.



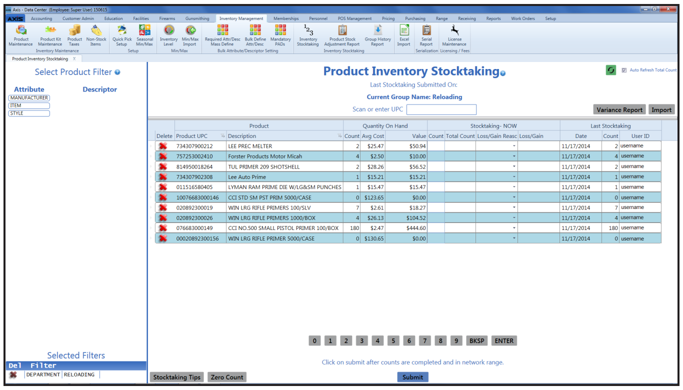
2. Click the **Search** button beside the **Selling Unit UPC** field to display the **Product Search** window.
3. Select a Product to identify the selling unit UPC (typically a single item).
4. Click the **Search** button beside the **Case UPC** field to display the **Product Search** window.
5. Select a Product to identify the case UPC (typically a case or multi-pack item).

    Note: If the case UPC does not exist in the database, refer to Manage Product Information for information on adding the case UPC to the product database. Be sure to uncheck the **Is Stock Item** checkbox and set the price according to the contents of the case UPC.

6. Enter the number of units per case in the **Units/Case** field.
7. Click the **Submit** button to add the case quantity to the screen.
8. Click the tab's **Close** button to close the screen.

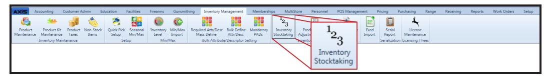
Product Inventory Stocktaking screen

The **Product Inventory Stocktaking** screen allows the user to create/select an inventory count group, complete a count of items in the group, and view the **Variance Report**.

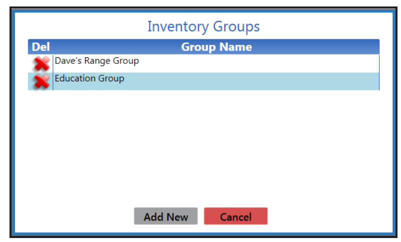


Access

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



2. Select **Inventory Management > Inventory Stocktaking** from the main menu to display the **Inventory Groups** window in front of the **Product Maintenance** screen.



3. Complete one of the following procedures as appropriate to display the **Product Inventory Stocktaking** window.
   - Create an Inventory Count Group
   - Select an Inventory Count Group

Procedures

- Perform a Physical Inventory Count for Non-Firearm Items
- View the Variance Report
- Import Inventory Stocktaking Data

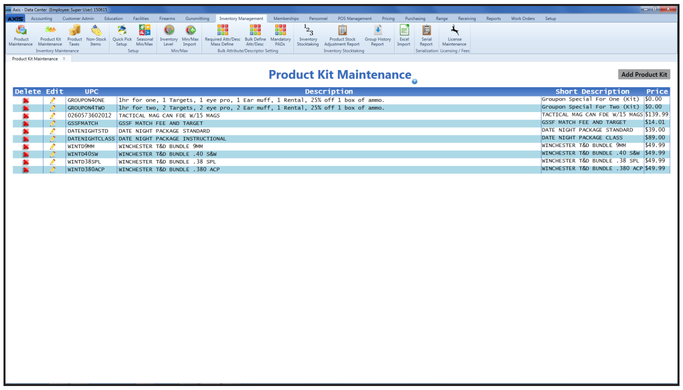
Features

Select Product Filter section, **Clear Filters** button, **Save Filter** button	Use these controls when defining an inventory count group to filter the list of items according to attribute/descriptor combinations. Refer to Create an Inventory Count Group for more information.
Refresh button	Click the **Refresh** button to manually refresh (update) the **Stocktaking-NOW Total Count** column with the most recent counts from all users.
Auto Refresh Total Count checkbox	Check the **Auto Refresh Total Count** checkbox to automatically update the **Stocktaking-NOW Total Count** column each time a user's **Stocktaking-NOW Total Count** column is updated.
Variance Report button	Click the **Variance Report** button to view the **Variance Report**, a record of differences between the Quantity on Hand (QOH) shown in the books and the quantities captured during a stocktaking procedure.

Import button	Click the **Import** button to import stocktaking data from a formatted Excel file.
Stocktaking Tips button	Click the **Stocktaking Tips** button to view standard stocktaking tips.
Zero Count button	Click the **Zero Count** button to enter zero (0) counts for all inventory group items which do not already have a count value. (Existing values with counts will not be changed.)

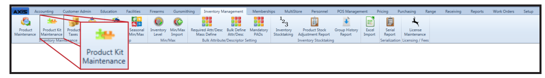
Product Kit Maintenance screen

The **Product Kit Maintenance** screen allows the user to create, edit, modify products within, and delete product kits.



Access

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



2. Select **Inventory Management > Product Kit Maintenance** from the main menu to display the **Product Kit Maintenance** screen.

Procedures

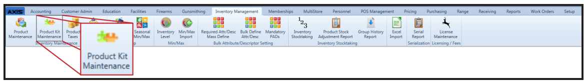
- Manage Product Kits
- Create or Edit a Product Kit
- Add and Edit a Product Kit Product (page 45)
- Remove a Product Kit Product (page 44)
- Delete a Product Kit

Features

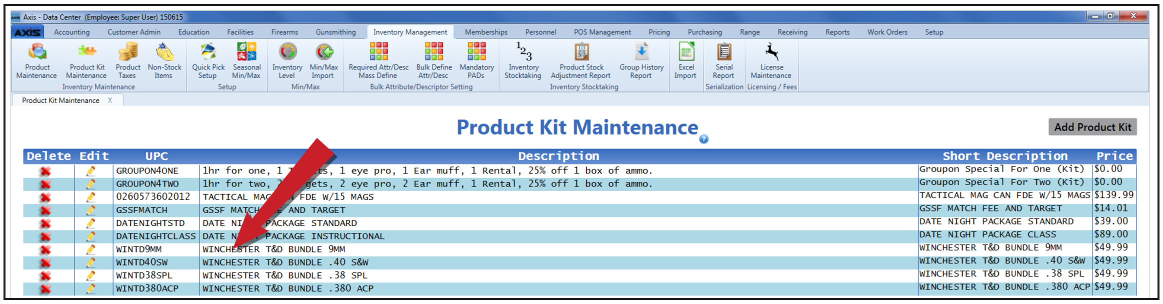
Add Product Kit button	Click the **Add Product Kit** button to create a new product kit.
Delete button	Click a product kit’s **Delete** button to remove it from the screen.
Edit button	Click a product kit's **Edit** button to modify its data.
Product Kit entry	Click a product kit to display its **Product Kit Items** record.
Product Kit Items Record fields	
Add Kit Item button	Click the **Add Kit Item** button to add a product to the kit.
Delete button	Click a product’s **Delete** button to remove it from the kit.
Print Label button	Click the **Print Label** button to print a label for the kit.
Cancel button	Click the **Cancel** button to undo modifications to the **Product Kit Items** record that have not been submitted.
Submit button	Click the **Submit** button to submit and save changes to the **Product Kit Items** record.

Remove a Product Kit Product

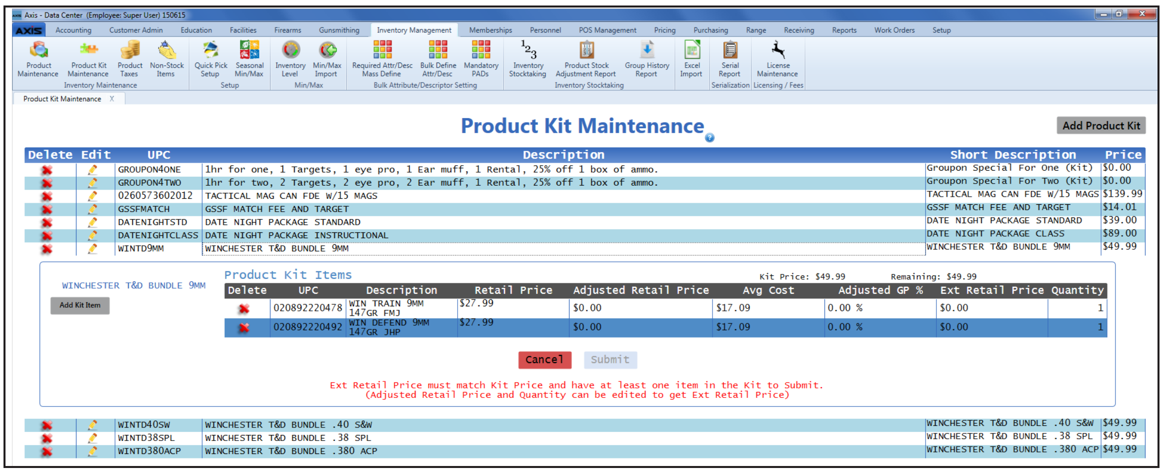
1. Navigate to the **Product Kit Maintenance** screen.
    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.

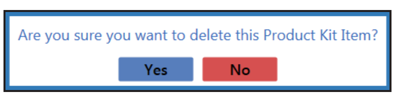
    2. Select **Inventory Management > Product Kit Maintenance** from the main menu to display the **Product Kit Maintenance** screen.

2. Click a product kit to display its **Product Kit Items** record.

3. Click a product's **Delete** button to display a deletion confirmation window.

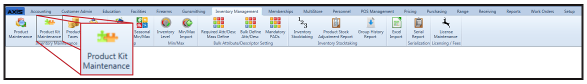
   

4. Click the **Yes** button to close the window and remove the product from the **Product Kit Items** record.
5. When all unwanted products have been removed from the kit, add additional products as desired and modify the **Quantity** and **Adjusted Retail Price** values for each product in the kit.

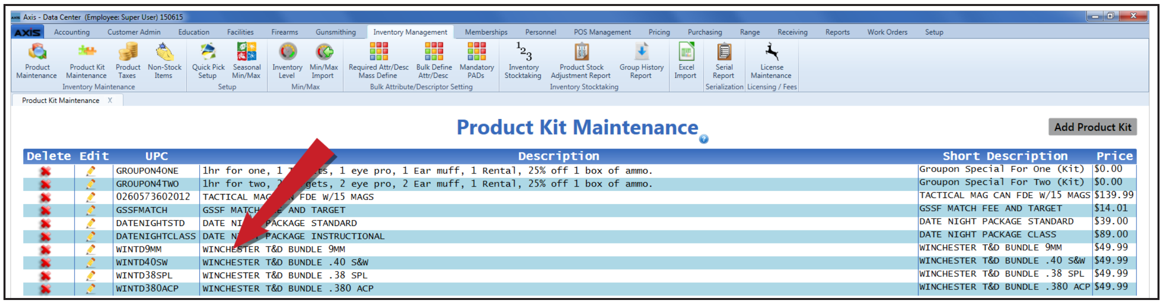
Note: Refer to Add and Edit a Product Kit Product (page 45) for more information.

Add and Edit a Product Kit Product

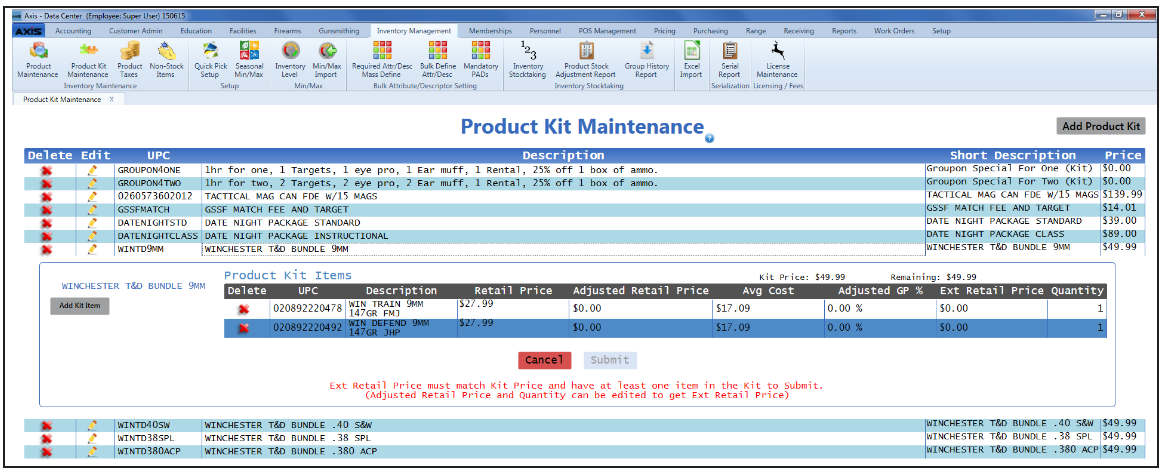
1. Navigate to the **Product Kit Maintenance** screen.
    1. Log In to the Data Center Application to display the **Data Center Main Menu** screen.

    2. Select **Inventory Management > Product Kit Maintenance** from the main menu to display the **Product Kit Maintenance** screen.



2. Click a product kit to display its **Product Kit Items** record.



3. Complete the following procedure as needed to add individual products to the kit:

   Note: To remove a product from a kit, refer to Remove a Product Kit Product (page 44).

    1. Click the **Add Kit Item** button to display the **Product Search** window.
    2. Select a Product to add it to the **Product Kit Items** record.

       Note: These types of products may not be added to a kit: Firearms, Serialized non-firearms, Range use products, Licenses, Gift Cards, Memberships, Classes, System generated items, and other product kits.

4. If needed, modify a product's **Quantity** value to reflect the quantity of the product to include in each kit.
5. When all products have been added and quantified as desired, assign an **Adjusted Retail Price** value to each product.

   Note: A product's **Adjusted Retail Price** represents the portion of the total kit price that is attributed to that single product. This value is multiplied by the product's **Quantity** to determine the product's **Ext Retail Price** value.
   The sum of all **Ext Retail Price** values must be equal to the **Kit Price** in order for the **Submit** button to

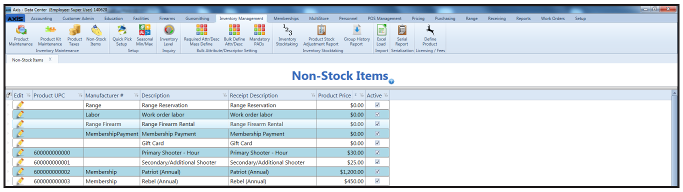
be active and available. The **Remaining** field displays the difference between these values and shows "$0.00" when the values are equal.

6. Click the **Submit** button to display a save confirmation window.
7. Click the **Close** button to close the window.

Note: If a product is added to or removed from a kit or the kit's **Price** is changed, the **Adjusted Retail Price** values will need to be reset.

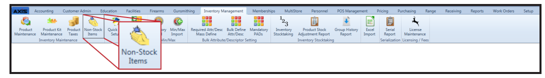
Non-Stock Items screen

The **Non-Stock Items** screen allows the user to view and modify non-stock items.



Access

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



2. Select **Inventory Management > Non-Stock Items** from the main menu to display the **Non-Stock Items** screen.

Procedures

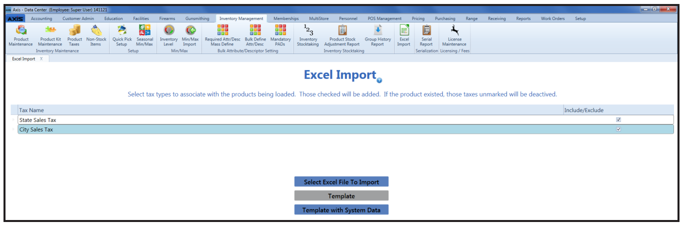
- View and Edit Non-Stock Items

Features

Edit button	Click an item's **Edit** button to display its Product Edit window (page 26). **Note:** Refer to Manage Product Information for more information on modifying item data.

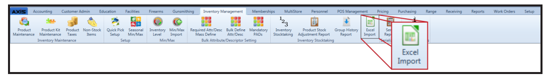
Excel Import screen

The **Excel Import** screen allows the user to import item data into the inventory by creating, populating, and importing a formatted Excel file.



Access

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



2. Select **Inventory Management > Excel Import** from the main menu to display the **Excel Import** screen.

Procedures

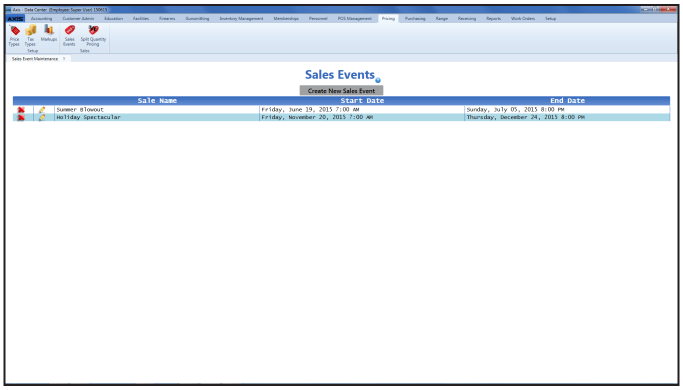
- Import Inventory Item Data

Features

Include/Exclude checkbox	Check a tax type's **Include/Exclude** checkbox to apply the tax to the items being imported. Uncheck the checkbox to import items without applying the tax type.
Select Excel File to Import button	Click the **Select Excel File to Import** button to import the formatted Excel file.
Template button	Click the **Template** button to export an unpopulated template (formatted Excel file).
Template with System Data button	Click the **Template with System Data** button to export a template (formatted Excel file)populated with all item data from the system

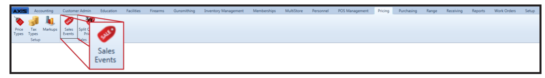
Sales Events screen

The **Sales Events** screen allows the user to create, edit, and delete sales events, assign products to events, and edit product prices.



Access

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



2. Select **Pricing > Sales Events** from the main menu to display the **Sales Events** screen.

Procedures

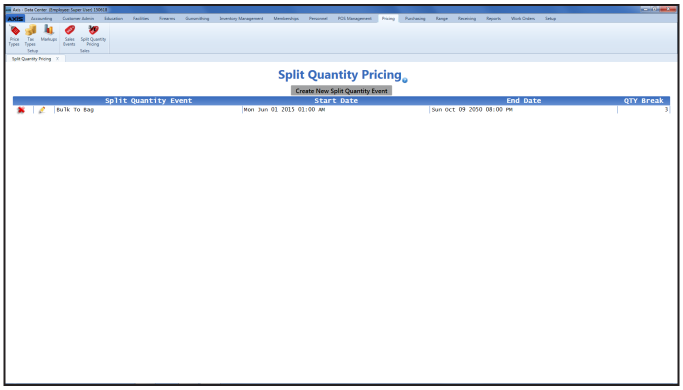
- Manage Sales Events
- Create or Edit a Sales Event
- Add or Remove a Sales Event Product
- Edit a Sales Event Product's Price
- Delete a Sales Event

Features

Create New Sales Event button	Click the **Create New Sales Event** button to create a new sales event.
Delete button	Click a sales event's **Delete** button to remove the sales event from the screen.
Edit button	Click a sales event's **Edit** button to edit the sales event.
Sale name	Click a sales event's name to display its **Sale Event Products and Pricing** record.
Sale Event Products and Pricing Record controls	
Add Products button	Click the **Add Products** button to add a product to the sales event.
Delete button	Click a product's **Delete** button to remove it from a sales event.
Edit button	Click a product's **Edit** button to modify its sales event price.

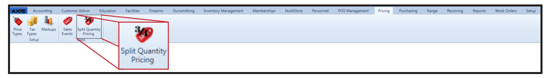
Split Quantity Pricing screen

The **Split Quantity Pricing** screen allows the user to create, edit, and delete split quantity pricing events, assign products to these events, and edit product prices.



Access

1. [Log In to the Data Center Application]() to display the **Data Center Main Menu** screen.



2. Select **Pricing > Split Quantity Pricing** from the main menu to display the **Split Quantity Pricing** screen.

Procedures

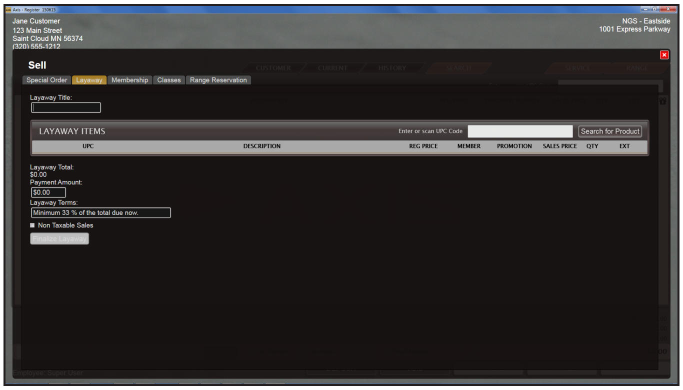
- [Manage Split Quantity Pricing Events]()
- [Create or Edit a Split Quantity Pricing Event]()
- [Add or Remove a Split Quantity Pricing Event Product]()
- [Edit a Split Quantity Pricing Event Product's Price]()
- [Delete a Split Quantity Pricing Event]()

Features

Create New Split Quantity Event button	Click the **Create New Split Quantity Event** button to create a new split quantity pricing event.
Delete button	Click an event's **Delete** button to remove the markup category from the screen.
Edit button	Click an event's **Edit** button to edit the markup category.
Category name	Click an event's name to display its **Split Quantity Event Products and Pricing** record.
Split Quantity Event Products and Pricing Record controls	
Add Products button	Click the **Add Products** button to add a product to the event.
Delete button	Click a product's **Delete** button to remove it from the event.
Edit button	Click a product's **Edit** button to modify its split quantity price.

Layaway page

The **Layaway** page allows the user to place an item on layaway, define the layaway terms, and add the initial layaway payment (deposit) to the Cash Register screen.



Access

1. Log In to the Register Application.
2. Identify the Customer.
3. Click the **Sell** tab to display the **Sell** window.
4. Click the **Layaway** tab to display the **Layaway** page.

Procedures

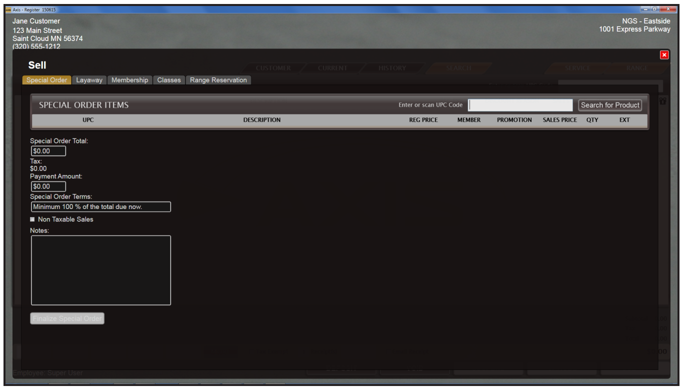
- Place a Product on Layaway

Features

Layaway Title field	Enter a descriptive title in the **Layaway Title** field
Enter or Scan UPC Code field	Scan or enter the product's UPC in the **Enter or Scan UPC Code** field and press the **Enter** key to select the desired product.
Search for Product button	Click the **Search for Product** button and search for and select the desired product.
Payment Amount field	Modify the automatically calculated amount in the **Payment Amount** field.
Layaway Terms field	Enter/edit terms in the **Layaway Terms** field.
Non Taxable Sales checkbox	If the transaction is tax exempt, check the **Non Taxable Sales** checkbox.
Finalize Layaway button	Click the **Finalize Layaway** button to (1) add the item to the customer's **Layaways** list on the **Current** window, (2) add the initial payment amount to the **Cash Register** screen, and (3) display the layaway document.

Special Order page

The **Special Order** page allows the user to place an item on special order, define the order terms, and add the initial special order payment (deposit) to the Cash Register screen.



Access

1. Log In to the Register Application.
2. Identify the Customer.
3. Click the **Sell** tab to display the **Sell** window.
4. Click the **Special Order** tab to display the **Special Order** page.

Procedures

- Place a Special Order

Features

Enter or Scan UPC Code field	Scan or enter the product's UPC in the **Enter or Scan UPC Code** field and press the **Enter** key to select the desired product.
Search for Product button	Click the **Search for Product** button and search for and select the desired product.
Payment Amount field	Modify the automatically calculated amount in the **Payment Amount** field.
Special Order Terms field	Enter/edit terms in the **Special Order Terms** field.
Non Taxable Sales checkbox	If the transaction is tax exempt, check the **Non Taxable Sales** checkbox.
Notes field	Enter explanatory notes in the **Notes** field.
Finalize Special Order button	Click the **Finalize Special Order** button to (1) add the item to the customer's **Special Orders** list on the **Current** window, (2) add the deposit amount to the **Cash Register** screen, and (3) display the special order document.