AXIS™ 2.10 Release Notes

May 2017

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Overview

The AcuSport® Retail Technology Group (RTG) provides this document as a high-level summary of the latest release of the AcuSport AXIS software system.

Manufacturing Bound Book

The Manufacturing Bound Book is intended for retailers that have multiple FFLs and wish to manage them both in the AXIS Retail Management System. **This feature can only be enabled by a RTG Customer Support Representative and will require three new employee permissions.**

Set up the Manufacturing Bound Book

1. Contact a RTG Customer Support Representative to enable the Manufacturing Bound Book.

2. Log in to the Data Center Application to display the Data Center Ribbon Menu.

3. Click the **Employee** tab to display the Employee Ribbon Menu.

4. Click the **Select Employee** button to display the Employee Look-up screen.

5. Enter the **Last Name** of the employee and double-click them in the grid to display the Employee Information screen.

6. Click the **Security Information** button to display the Security Information screen.

7. Select one or more of the following roles:

   - **Manufacturing –** This role will enable the user to view the tab and the FFL Information. This role will not allow the user to edit any information.
   - **ManufacturingEdit –** This role—used in conjunction with the Manufacturing role—will allow the user to make changes in the FFL Information screen and create and edit orders.
   - **ManufacturingTransactions –** This role—used in conjunction with the Manufacturing role—will allow the user to submit changes that will impact the bound book (e.g., submitting transfers, submitting orders, and modifying bound book records).

8. Click the **Submit** button to save the roles to the employee.

9. Logged in as a user with the correct permissions, click the **Manufacturing** tab to display the Manufacturing Ribbon Menu.

> **Note: The first time the tab is opened only the FFL Information button will appear.**

10. Click the **FFL Information** button to display the FFL Information screen.

11. Enter the **Trade Name, Address, City, State, ZIP Code,** and **FFL Number.**

12. Click the **Submit** button to save the FFL Information.

13. Click the **Purchasing** tab to display the Purchasing Ribbon Menu.

14. Click the **Add New Vendor** button display the Vendor Information screen.

> **Note: If a vendor is already set up for the Manufacturing Bound Book, click Select Vendor and select the appropriate vendor.**

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15. Enter the information you will use for your Manufacturing Bound Book including the **FFL Number and Address**—these must match what was entered in the **FFL Information** screen.

16. Click the **Submit Changes** button to save the vendor.

17. **Close** the Data Center application and then open it and log in.

18. Click the **Manufacturing** tab to display the Manufacturing Ribbon Menu—the Bound Book, Transfer In, Transfer Out, Orders, and Orders History By Item buttons will now appear.

Transfer Firearms In to the Manufacturing Bound Book

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Manufacturing** tab to display the Manufacturing Ribbon Menu.

> **Note: In order to access the Transfer In functionality the employee logged in will need the Manufacturing and ManufacturingTransactions roles.**

3. Click the **Transfer In** button to display the Transfer In screen.

4. Click the **Add Transfer** button to display the Firearm Inventory.

> **Note: The firearm inventory shows all of the available firearms from the NFA and Non-NFA Bound Books.**

5. Select one or more firearms and then click the **Submit** button to add them to the Transfer In screen.

6. Set the date for the transfer and enter any additional information and then click the **Submit** button to transfer the firearm(s) into the Manufacturing Bound Book.

View and Edit Firearms in the Manufacturing Bound Book

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Manufacturing** tab to display the Manufacturing Ribbon Menu.

> **Note: In order to edit the Manufacturing Bound Book the employee logged in will need the Manufacturing and ManufacturingTransactions roles.**

3. Click the **Bound Book** button to display the Manufacturing Bound Book.

4. Open individual records or print the bound book from this screen.

5. Print the bound book by clicking the **Print Bound Book** button and then saving the Excel file in the desired location.

6. Open a record by clicking the **Edit** button or double-clicking on the record in the grid.

7. View or edit any of the firearm's information, delete the disposition or record, and add any notes in the Additional Information text box.

Note: The Additional Information text box prepopulates with information regarding where the firearm was transferred from, the date of the transfer, the user that transferred the firearm, and the log number from the originating bound book. This note will also appear in the Additional Information section in the record from the originating bound book.

Create and Process a Manufacturing Order

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Manufacturing** tab to display the Manufacturing Ribbon Menu.

   Note: In order to create, edit, and submit a Manufacturing Order the employee logged in will need the Manufacturing and ManufacturingTransactions roles. Users with the ManufacturingEdit role can create and edit orders but not submit them.

3. Click the **Orders** button to display the Manufacturing Orders screen.

4. Click the **New Order** button to display the Add Order screen.

5. Click the **Select Firearm** button to display the Firearm Inventory screen—the Firearm Inventory only shows firearms from the Manufacturing Bound Book that are not disposed.

6. Select the firearm and then click the **Submit** button to add the firearm to the order.

7. Change the **Start Date** for the order if necessary.

8. Add any notes into the **Notes** text box.

9. Add products from the inventory to the order by scanning the UPC, Manufacturing Number, or Item Number or by clicking the **Product Search** button and selecting one or more products from the grid.

   Note: Adjust the quantity of the added product(s) by clicking inside the Qty column in the grid and then adjusting the number.

10. Add labor by clicking the **+Labor** button to display the Order Detail screen.

11. Enter Notes, Description, Quantity, and Unit Cost for the labor and then click the **Submit** button to add the labor cost to the order.

12. Click the **Print Order** button to display a printable Order List.

13. Click the **Submit** button to create the order.

14. Click the **Edit** button to display the Edit Order screen. Add or remove products and labor from the order, change the Notes, change the Start Date, and print the order from this screen.

15. Click the **Process** button to display the Manufacturing Order Finalize screen. View the Current Serial Information and enter the Outgoing Serial Information from this screen.

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16. Enter the **UPC** in the Outgoing Serial Information section.

> Note: If the UPC has previously been received as a firearm and all the relevant information was entered, the fields in this screen will prepopulate with that data.

17. Enter all required information and a Sale Price. Click the **Submit** button to finalize the order—**clicking Submit will transfer this firearm back into the NFA or Non-NFA Bound Book.**

18. To view the information submitted for the order, click the **Process** button on the order and the historical data will be displayed on the screen.

Transfer Firearms Out of the Manufacturing Bound Book

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Manufacturing** tab to display the Manufacturing Ribbon Menu.

> Note: In order to access the Transfer Out functionality the employee logged in will need the Manufacturing and ManufacturingTransactions roles.

3. Click the **Transfer Out** button to display the Transfer Out screen.

4. Click the **Add Transfer** button to display the Firearm Inventory.

> Note: The firearm inventory shows all of the available firearms from the Manufacturing Bound Book.

5. Select one or more firearms and then click the **Submit** button to add them to the Transfer Out screen.

6. Set the date for the transfer and enter any additional information and then click the **Submit** button to transfer the firearm(s) into the appropriate bound book.

View the Orders History By Item Report

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Manufacturing** tab to display the Manufacturing Ribbon Menu.

> Note: In order to access the Orders History By Item report the employee logged in will need the Manufacturing and ManufacturingTransactions roles.

3. Click the **Orders History By Item** button to display the Orders History By Item screen.

4. Enter a **Date Range** and then click the **Submit** button to display data for the chosen date range.

5. The report shows items that are tied to historical manufacturing orders and can be sorted, filtered, and printed.

Membership Dashboard

The Dashboard now contains six new panes, all dealing with memberships. The panes are designed to provide a high-level overview on six different aspects of membership data.

View the new Membership Panes in the Dashboard

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Reports** tab to display the Reports Ribbon Menu.

3. Click the **Dashboard** button to display the Dashboard.

4. Click the **Panes** button to display the list of panes including the new Membership Panes:

   - **Membership Denials:** The Membership Denials pane displays the number of denied membership payments for the day. To view more details on the denied payments, view the Payment Charge Denials report (List Denials button) in the Memberships tab.
   - **Membership Fees:** The Membership Fees pane displays the total for initial membership fees and recurring fees accrued for the current month-to-date. It also displays the previous month's total to compare against.

   > **The Membership Fees pane contains an editable threshold; click the gear button to display the Membership Fees Thresholds screen and edit the fields.**

   - **Memberships (Active):** The Memberships (Active) pane displays the current number of members for all memberships that are active (i.e., not suspended or expired).
   - **Memberships Gained:** The Memberships Gained pane displays the number of memberships gained over the last 30 days.
   - **Memberships Lost:** The Memberships Lost pane displays the number of memberships lost over the last 30 days.
   - **Memberships Suspended:** The Memberships Suspended pane shows the total number of memberships that are suspended as of today.

5. Select any or all of the new membership panes to add to the current Dashboard display or create a new Dashboard for the Membership panes and save it.

Sell Options (Auto Add)

The Sell Options functionality allows a product to be automatically added to a transaction in the Register when a connected product is added to the transaction. For example, Product X is always sold with Product Y; Product Y can now be added as a Sell Option to Product X. That way, when Product X is rung up at the Register, Product Y is automatically added to the transaction.

Set up a Sell Option

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Inventory Management** tab to display the Inventory Management Ribbon Menu.

3. Click the **Product Maintenance** button to display the Product Maintenance screen.

4. Open a product by clicking the **Edit** button or double clicking the row to display the Product Edit screen.

5. Click the **Sell Options** tab to display the Sell Options screen.

6. Add a product by scanning the UPC, Manufacturer Number, or Item Number or click the **Product Search** button and select a product.

7. Edit the quantity to be added to the transaction by clicking in the **Qty** text box and changing the number.

8. Click the **Delete** button to remove a product.

9. Click the **Submit** button to save the changes.

Sell the Product with the Sell Option at the Register

1. Log in to the Register Application to display the main Register screen.

2. Add the product to the Register by scanning the UPC—the product added on the Sell Options screen will be automatically added to the transaction along with the quantity entered.

3. Click the Delete button to remove the auto added product from the transaction.

Credit Card Hold

The Credit Card Hold functionality allows retailers with a VeriFone MX 900 series payment terminal to swipe and hold a customer's credit card to use for payment at a later time.

Enable Credit Card Holds

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Setup** tab to display the Setup Ribbon Menu.

3. Click the **POS Setup** button to display the POS Setup screen.

4. Check the box next to **Allow Credit Card holds at the Register (For VeriFone MX 900 series machines only).**

5. Click the **Submit** button to save the changes.

Use the Credit Card Hold at the Register

1. Log in to the Register Application to display the main Register screen.

2. Select a customer to display the customer's information in the main Register screen.

3. Add products to the transaction to enable the **CC Hold** button—the CC Hold button will only be activated when a customer is selected **and** products are added to the transaction.

4. Click the **CC Hold** button to initialize a card swipe on the VeriFone MX 900 series payment terminal.

5. The customer will need to swipe a card on the payment terminal to receive the preauthorization approval.

6. When the card is approved, a **CC Hold** tender will appear as a payment for the transaction—the tender will include the type of card and the last 4 digits of the card.

> **Note: Once the CC Hold tender has been applied to a transaction no other tenders will be allowed to be added to that transaction.**

7. Cancel the credit card hold by clicking the **Clear** button next to the tender or by clicking **Cancel** to cancel the entire transaction.

8. Click the **Suspend** button to suspend the transaction to be brought up and paid for later.

> **Note: The Suspended Transactions tab in the History screen now includes a column titled CC Hold that will allow an employee to see which customers currently have credit cards on hold for their transaction.**

9. Reselect the customer to display the customer's transaction with the credit card hold still applied to the balance due.

10. Finalize the transaction by clicking the **Submit** button or add more products to the transaction and then click the **Submit** button.

> **Note:** **The amount charged to the credit card will increase automatically to the Total as more products are added to the transaction.**

Customer Notes

The new Customer Notes feature allows notes to be entered in either the Data Center or Register that can be easily brought up in the Register while the customer is selected. Depending on the note type the Register will display the severity of the note, allowing a cashier to quickly identify customers that have warnings or are prohibited from certain activities.

Create a Customer Note in the Data Center

1. Log in to the Data Center Application to display the Data Center Ribbon Menu.

2. Click the **Customer Admin** tab to display the Customer Admin Ribbon Menu.

3. Click the **Select Customer** button to display the Customer Look-up screen.

4. Enter a last name in the **Last Name** and press the Enter key to search for a customer.

5. Select a customer from the list to display the Overview of [customer] screen.

6. Click the **Notes** button to display the Customer Notes for [customer] screen—any existing notes will appear on this screen and can be edited or deleted.

7. Click the **New Note** button to display the Customer Notes screen.

8. Select a **Type** from the dropdown menu.

   - **General:** General information about the customer that may be important for a cashier to know. When a General note is entered into the system and that customer is selected in the Register, the new Notes button will appear **green** to signify that a General note exists for this customer.
   - **Warning:** Select this option if a customer has been issued a warning for any reason. When a Warning note is entered into the system and that customer is selected in the Register, the new Notes button will appear **yellow** to signify that a Warning note exists for this customer.
   - **Prohibit:** Select this option if a customer is prohibited from doing any activities. When a Prohibit note is entered into the system and that customer is selected in the Register, the new Notes button will appear **red** to signify that a Prohibit note exists for this customer.

9. Enter a date in the **Expiration** date field if applicable—this date is not required.

10. Enter the note in the **Notes** text box.

11. Click the **Submit** button to save the note or click **Cancel** to discard it.

Create a Customer Note in the Register

1. Log in to the Register Application to display the main Register screen.

2. Select a customer to display the customer's information in the main Register screen.

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3. Click the **Notes** button to display the Customer Notes screen.

> **The Notes button also appears in the Party Control screen.**

4. Click the **New Note** button to start writing a new note.

5. Select a **Type** from the dropdown menu.

   - **General:** General information about the customer that may be important for a cashier to know. When a General note is entered into the system and that customer is selected in the Register, the new Notes button will appear **green** to signify that a General note exists for this customer.

   - **Warning:** Select this option if a customer has been issued a warning for any reason. When a Warning note is entered into the system and that customer is selected in the Register, the new Notes button will appear **yellow** to signify that a Warning note exists for this customer.

   - **Prohibit:** Select this option if a customer is prohibited from doing any activities. When a Prohibit note is entered into the system and that customer is selected in the Register, the new Notes button will appear **red** to signify that a Prohibit note exists for this customer.

6. Enter a date in the **Expiration** date field if applicable—this date is not required.

7. Enter the note in the **Notes** text box.

8. Click the **Submit** button to save the note or click **Cancel** to discard it.

9. Click the **Close** button to return to the main Register screen.

Transaction Discount

The Transaction Discount feature allows for discounts to be applied to the entire transaction, rather than applying the discount per item in the Register.

Discount a Transaction in the Register

1. Log in to the Register Application to display the main Register screen.

2. Add products to the transaction.

3. Click the **Discount** button to bring up the Discount screen.

4. Enter the amount of the discount in the **Discount Percent** field to discount the entire transaction by that percentage.

> **Note: Any products that are already discounted—through a membership for example—will receive the best discount.**

5. Click the **OK** button to apply the discount to the products currently added to the transaction.

> **Note: Any products added after the discount is applied <u>will not</u> include the discount. The Discount will need to be reapplied using the procedure above.**

Enhancements

Bound Books

The Bound Books will now appear in the new grid type. The grid can be sorted, filtered, saved, and exported just as other grids.

Firearm Taxes

Firearms are now taxed based on the taxes applied at the UPC level in Product Maintenance. When the software updates any taxes applied to the UPC will be removed and replaced by taxes set up in the Firearm Taxes screen. The taxes set up in the Firearm Taxes screen will now act as a backup if taxes are not applied at the UPC level.

Gun Labels

The Log Number fields in the Firearm Label Print Control screen will now accept up to 10 digits.

Customer Information from the 4473

Previously, the system would automatically overwrite any customer information stored with what a customer entered on their 4473 form. Now the system will prompt the employee processing the 4473 and will only overwrite the customer information when the Update Record button is clicked in the first Process 4473 screen.

GP % added to Product Maintenance

The GP % (gross profit percentage) column now appears in the Product Maintenance grid. It also appears in the Product Edit screen below the Avg Cost.

Inventory Turns added to Sales Analysis

The Sales Analysis screen now displays Inventory Turns below Avg Cost.

Notes added to the Serial Report

Notes can now be added to serialized items in the Serial Report screen. Click the Edit button to add notes—the notes will appear in the Serial Notes column in the grid.

Tax Types can be added with a dollar value

New tax types can now be added as a dollar value instead of a percent value. Create a new tax type and select the Dollar radio button next to Tax Rate—in the Tax Rate Information screen a dollar amount can now be entered.

Purchase Order Preview

Clicking Submit on the Purchase Order Preview screen will now notify the user that a live order will be sent to AcuSport. The system will prompt the user to continue with submitting the purchase order or return to the Purchase Order Preview screen.

Purchasing now has Auto Replenishment and On Order Columns

The Create Purchase Orders grids now include columns for Auto Replenishment and On Order.

Inventory Turns Report new columns

The Inventory Turns Report now includes the Last Sold Date, Last Received Date, and QoH columns.

Two reports can now display data for today's date

The Inventory Turns Report and the Manufacturing Sales Report will now display data for the current date.

Chart view in the Sales Performance Report

Click the Chart View tab in the Sales Performance Report to display the default chart view for the report. By default the chart displays the Sales per Day of Week, Sales per Hour, and Sales Profit per Employee panes. Other panes include: Items per TRX by Employee and Sales per Employee. The Chart View functions just as the Dashboard does.

Sales Performance Report changes

The column header for Employee now appears as Salesperson.

When selling a product at the Register the Salesperson will default to the user logged in. When Salesperson A is logged in and sells item X and Y and then suspends the transaction, if Salesperson B then recalls that suspended transaction and adds item Z, the report will show Salesperson A as having sold items X and Y and Salesperson B as having sold item Z.

When a product is returned the Sales Performance Report will now correctly reduce the values for the employee that originally sold the item rather than the employee that performed the return. Note that this **will not** apply to products sold with a quantity of -1. The product must be returned from Transactions History to apply to the salesperson that sold the product originally.

Dashboards can now be printed

Click the Print button on the Dashboard screen to print the currently displayed panes to a PDF or printer—any floating panes will not be printed. The Chart View in the Sales Performance Report can also be printed.

Quick Picks Quantity Selector

The Quick Picks screen in the Register allows a cashier to quickly adjust the quantity of the item being sold.

VeriFone MX 900 series pole display

The VeriFone MX 915 and MX 925 credit card terminals now function as a pole display. They can be used in addition to the current pole display or independently.

VeriFone MX 900 Credit/Debit selection on screen

When a VeriFone MX 915 or MX 925 credit card terminal is attached to a Register, the Credit and Debit buttons will be replaced with a Card button. This allows a customer to select if they are using Credit or Debit on the terminal.

Range Time is now returnable

Range time can now be returned at the Register. Return the range time in the Transactions history and double-click the line item.

Smartwaiver now includes customer addresses

Contact AcuSport RTG to enter a new API key into the system. Once the new key is entered, address information from Smartwaiver will be added to the customer's information when creating the customer in the Register.

Startup Message no longer appears in the Register

The Configuration Issues message that displayed in the Register after logging in no longer appears.

Bug Fixes

Process 4473 screen wrong state message

The Process 4473 screen will no longer erroneously display that the customer's state does not match the sale state.

Recurring Family Membership suspensions

When suspending a recurring membership any family members on the membership are now suspended.

Smartwaiver times

Smartwaiver times will now display in local time.

Membership Emails

Emails will no longer be sent after a customer's membership has expired.