

Software Update Notes: Version 2.5

September 2015

Notes

Click the **Notes** button to view this document in the [AXIS Online Guide](#) and access associated topics and procedures.

This document provides an overview of the additions, changes, and improvements available in the version 2.5 update to the AXISTM Retail Management System software. This update includes the following highlights:

Self Service Installation

The Software Update feature (installed with version 2.4) allows the system administrator to control when the update is installed, eliminating the need to schedule a remote installation with RTG Support.

Here is a brief rundown:

1. When the software update is available, the **AXIS** system downloads it to the server and displays a New Version notification message on all machines.
2. At the desired time, an authorized user can access the [Software Versions screen](#) on the server and initiate a system-wide installation.

Note: Refer to [Install a Software Update](#) for more information.

3. For technical assistance, email [RTG Support](#) or phone 1-800-547-7120.

EMV Compatability

The addition of the [Payment Terminal Setup screen](#) (and an impressive amount of behind-the-scenes improvements) allow the system administrator to integrate EMV-compatible terminals with the AXIS storewide system. Transactions involving [Credit Cards \(page 7\)](#) include a few more steps and restrictions, but it is easier than ever to get them right.

More

- [Access, Setup, and Maintenance \(page 3\)](#)
- [Inventory Management \(page 5\)](#)
- [Customer Transactions \(page 7\)](#)
- [Firearms, Range, and Gunsmithing \(page 9\)](#)

AXIS™ Software Update Notes:
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Access, Setup, and Maintenance

Security

- The **FirearmEdit** security role (permission) has been added to the [Security Information for <employee> screen](#). If assigned to the user, this role allows the user to save changes, delete dispositions, and delete records in a Bound Book.

Note: When the 2.5 install occurs, this role will automatically be assigned to users who have been assigned the **FirearmBoundBook** role. Be sure to unselect the new role for individual users as needed to restrict the ability to modify Bound Book records.

Ribbon Menus

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

Accounting

- The **Accounting Setup** button has replaced the **Set up Accounting** button. Click this button to display the [Accounting Setup screen](#).

Customer Admin

- The **Add Customer Info** button has replaced the **Add New Customer** button. Click this button to display the [Customer Information for <customer> screen](#).
- The **House Account List** button has replaced the **House Accounts Report** button. Click this button to display the [House Account List screen](#).
- The **Deposit List** button has replaced the **Deposit Lists** button. Click this button to display the [Deposit List screen](#).

Firearms

- The **Firearm Inventory Report** button has been added to the ribbon menu. Click this button to display the [Firearm Inventory Report screen](#).
- The **Inventory Report With Costs** button has been removed from the ribbon menu.
- The **Inventory No Costs** button has been removed from the ribbon menu.
- The **Firearms > Physical Firearm Inventory Count > Gunsmith** option has replaced the **Firearms > Physical Firearm Inventory Count > Gunsmithing** option. Click this option to display the [Gunsmith Physical Firearm Inventory Count screen](#).

Employee (formerly Personnel)

- The **Employee** ribbon menu has replaced the **Personnel** ribbon menu.
- The **Add Employee Info** button has replaced the **Add New Employee** button. Click this button to display the [Employee Information for <employee> screen](#).
- The **Employee Info and Edit** button has replaced the **Edit Employee** button. Click this button to display the [Employee Information for <employee> screen](#).
- The **Security Information** button has replaced the **Security Management** button. Click this button to display the [Security Information for <employee> screen](#).

POS Management

- The **Drawer Return** button has replaced the **Return Drawer** button. Click this button to display the [Drawer Return screen](#).

Reports

- The **Sales Performance Report** button has been added to the ribbon menu. Click this button to access the [Sales Performance Report screen](#).
- The **Inventory Turns Report** button has been added to the ribbon menu. Click this button to access the [Inventory Turns Report screen](#).
- The **Inventory Reports > Value on Hand Report** option has replaced the **Inventory Reports > Value On Hand Report** option. Click this option to display the [Value on Hand Report screen](#).

Setup

- The **Payment Terminal Setup** button has been added to the ribbon menu. Click this button to access the [Payment Terminal Setup screen](#).

General Procedures

Tax Exempt vs Non-Taxable

The following definitions have been standardized and implemented across multiple system features:

- **Tax Exempt** - The customer record contains a **Tax ID** value.
- **Non Taxable** - The item does not have any taxes assigned to it.
- **Taxable** - The item has one or more taxes assigned to it.

Note: Recurring payments, for instance, are now identified as "Non-Taxable" rather than "Tax Exempt".

Custom Screen Layouts

The following functions have been added and updated to improve the user's ability to customize the display of onscreen data:

- **Apply Filters Before Checking Boxes**

A number of screens now automatically uncheck all selected checkboxes when the user applies a new filter. Be sure to make individual selections as desired after all appropriate filters have been applied.

- **Group by Date**

A number of list/report screens now collect all transactions from a given date in a single group when the user groups rows according to the **Date** column.

Note: Previously, these screens would consider a transaction's timestamp when creating groups.

- **Save and Reuse a Custom Layout**

A number of list/report screens now allow the user to save a custom layout (desired combination of selected filters, groupings, sorts, etc.) and make it available for all users.

Refer to [Sort and Filter Reporting Screen Data](#) and [Sort and Filter Onscreen Data](#) for more information on these procedures.

Inventory Management

Product Maintenance

- The [Product Maintenance screen](#) has been updated with an improved product-filtering mechanism and an expanded layout.
- The [Vendor Product tab](#) on the [Product Edit window](#) is disabled when a new product is being created (i.e., added, cloned) through the [Product Maintenance screen](#).

Note: This tab is also disabled when a new product is being received through the [Receiving Details screen](#).

Product Imports

- The [Excel Import screen](#) will no longer allow the user to import an item with the same UPC as an existing, non-stock product.

Committed Quantities

The following procedures will increase or decrease an item's **Committed Quantity** value as shown:

Procedure (for a single item)	Change to value
Add a Component to a Work Order	+1
<ul style="list-style-type: none">• Deliver the completed work order to the customer• Void the payment for the completed work order	-1
Cancel a special order containing the item	-1
Cancel a layaway containing the item	-1
Document a Firearm Sale	+1
<ul style="list-style-type: none">• Complete the sale in the Register application.	-1
Document a Firearm Trade (sale portion)	+1
<ul style="list-style-type: none">• Complete the sale portion in the Register application.	-1
Add a Firearm to the Rental Firearm List	+1
Remove a Firearm from the Rental Firearm List	-1

Receiving

- The [Vendor Product tab](#) on the [Product Edit window](#) is disabled when a new product is being received through the [Receiving Details screen](#).

Note: This tab is also disabled when a new product is being created (i.e., added, cloned) through the [Product Maintenance screen](#).

Inventory Reports

- The [Serial Report screen](#) allows the user to view a record of serialized products sold and their serial numbers and includes an expanded layout. This screen replaces the **Serial Number Report** screen.

- The [Sales Performance Report screen](#) allows the user to review and print a report showing sales and profitability sorted by employee, transaction, date, machine, etc.
- The [Inventory Turns Report screen](#) allows the user to review and print a report showing inventory turns for a selected date range.

Accounting

- The [GL Postings screen](#) has been updated with an export to an Excel file function for use with accounting software packages that are not QuickBooks.

Customer Transactions

POS Management

- The [Drawer Return screen](#) allows the user to record a cash drawer return, reconcile it with the original cash drawer assignment, and print the reconciliation record. This screen replaces the **Drawer Reconciliation** screen.
- The [Firearm Inventory Report screen](#) allows the user to generate and view a record showing every inventoried firearm and its associated costs. This screen replaces the **Inventory With Cost Report** and **Inventory Without Cost Report** screens

Customer Records

- A customer record may no longer be merged with another if either record has an active **E4473** form. Refer to [View and Update the Customer List](#) for more information.
- The **Register** application has a new instant-access **Customer Look-up** field. Refer to [Identify the Customer](#) for more information.

Credit Cards

Swipe is the new OK

- The **Swipe** button has replaced the **OK** button for credit card transactions in the **Register** application.

Recurring Payments

- Recurring payments are now identified as "Non-Taxable" rather than "Tax Exempt". Refer to [Tax Exempt vs Non-Taxable \(page 4\)](#) for more information.
- Given the number of customers receiving new EMV-compatible credit cards, the [Payment Charge Denials screen](#) should be monitored closely for unusual denial activity.

Note: For more information, refer to [EMV May Lead to More Payment Denials](#) in the [AXIS Online Guide](#).

Payment Terminal Setup

- The [Payment Terminal Setup screen](#) allows the user to set up MX devices in preparation for EMV compatibility/functionality.

Register CC Functions

The following functions have been updated to accommodate EMV compatibility and address known credit card-related issues:

- [Accept a Credit Card Payment](#)
- [Void a Transaction](#)
- [Process a Return](#)

Layways & Special Orders

- A layaway transaction may be finalized in the **Register** application without using the **Current** tab.

- A special order transaction may be finalized in the **Register** application without using the **Current** tab.

Work Orders

- A work order that has been paid for may no longer be deleted.
- A work order that has been paid for may no longer be marked incomplete.

Note: Similar restrictions have been implemented for [Gunsmithing Work Orders \(page 9\)](#).

Firearms, Range, and Gunsmithing

Firearm Transactions

- If the cost associated with an incoming firearm (i.e., trade or purchase) is changed after the transaction, the system retains and uses both values in the following manner:
 - The new cost is reflected in the database and is used to calculate COGS when the firearm is sold.
 - The original (accurate) cost is reflected in the Reporting and Accounting features.

Firearm Reports

- The [Firearm Inventory Report screen](#) allows the user to generate and view a record showing every inventoried firearm and its associated costs. This screen replaces the **Inventory With Cost Report** and **Inventory Without Cost Report** screens

E4473

The following modifications have been made to **E4473** functionality.

- The **Mark Dealer Denied** button (available when processing an **E4473** form with the [Process Customer 4473 screen](#)) now updates specific form fields before moving the form to the [Denied 4473s screen](#).

Note: Refer to [Process a 4473 Form](#) for more information.

- A firearm that is attached to an **E4473** form (i.e., on hold) may no longer be selected when processing another **E4473** form.
- A customer record may no longer be merged with another if either record has an active **E4473** form. Refer to [View and Update the Customer List](#) for more information.

Gunsmithing Work Orders

- A gunsmithing work order that has been paid for may no longer be deleted.
- A gunsmithing work order that has been paid for may no longer be marked incomplete.

Note: Similar restrictions have been implemented for non-firearm [Work Orders \(page 8\)](#).