Software Update Notes: Version 2.6

February 2016

The version 2.6 software update for your **AXIS™** system includes a variety of behind-the-scenes fixes, improved screens and reports, and these great new features:

⊛ **Customer-Specific Sales Report**

The **Customer Sales** feature allows the user to review a sales history showing individual items and the customers to whom they were sold. Refer to Customer Sales (page 3) for more information.

⊛ **Dashboard Sales Monitor**

The **Dashboard** feature allows the user to review a selection of sales results, calculations, and historic comparisons in a customizable display. Refer to Dashboard (page 3) for more information.

⊛ **Sales Orders & Quotes**

The **Sales Orders & Quotes** feature allows the user to create, review, and edit quotes and sales orders, print associated documents, complete sales orders for shipping, and review completed sales orders for a selected date range or an individual customer. Refer to Sales Orders and Quotes (page 3) for more information.

Ready to install the update?

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. For an extended look at the entire procedure, view the **Installing AXIS Updates** video.
3. For technical assistance, email **RTG Support** or phone 1-800-547-7120.

View Online Guide

- Click the **View Online Guide** button to view this document in the **AXIS Online Guide** and access associated topics and procedures.
- Download this or another **AXIS RMS** document at the **RTG Library**.

Notices

Contents

New Features

Customer Sales

The Customer Sales screen allows the user to review a sales history showing individual items and the customers to whom they were sold. This information may be filtered and sorted as needed and exported to an Excel file for use in promotions and Customer Relationship Management (CRM) software.

Dashboard

The Dashboard screen allows the user to quickly review a selection of sales results, calculations, and historic comparisons in a customizable display.

Sales Orders and Quotes

The Sales Orders and Quotes screen allows the user to create quotes and original sales orders, review and modify details, and complete orders for shipping.

- The Quote Details screen allows the user to create, review, modify, print, and submit a quote.
- The Sales Order Details screen allows the user to create, review, modify, print a document (quote, pick ticket, or packing list) for, and complete a sales order.

The Sales Order History screen allows the user to review a record of completed sales orders for a selected date range.

- The Sales Order Details History screen allows the user to view the details of a completed sales order.

The Sales Orders for <customer> screen allows the user to review completed sales orders for a selected customer.

The Sales Orders page in the **History** window in the **Register** application allows the user to review completed sales orders for a selected customer.

The following reports have been updated to include Sales Order information:

12 Month Sales Report screen, Daily Register Report screen, Serial Report screen, Sales Tax Report screen, Retail Information Report screen, Transaction Item Report screen, Items Sold Report screen, Sales Performance Report screen, Inventory Turns Report screen,

System & Store

Security

The following modifications have been made to the security roles (permissions) and restrictions on the Security Information for <employee> screen.

- The **Employee** role (previously the **Personnel** role) allows the user to access the Employee ribbon menu. When the 2.6 install occurs, this role will automatically be assigned to users who have been assigned the **Personnel** role.
- The **EmployeeSecurity** role (previously the **Personnel** role) allows the user to access the Security Information button on the Employee ribbon menu. When the 2.6 install occurs, this role will automatically be assigned to users who have been assigned the **PersonnelSecurity** role.
- **New!** The **IMBulkEdit** role allows the user to access the **Bulk Edit** button on the Product Maintenance screen. When the 2.6 install occurs, this role will not be automatically assigned to any users.
- The **IMBulkSettings** role has been removed.
- The **Purchasing** role now allows the user to access **Sales Orders & Quotes** features.
- **New!** The **ReportsDashboard** role allows the user to access the Dashboard screen. When the 2.6 install occurs, this role will automatically be assigned to users who have been assigned the **Reports** role. Be sure to unselect the new role for individual users as needed to restrict access to the screen.

User Controls

The following modifications have been made to the **Data Center** application's ribbon menu.

- The Add Customer Information button has replaced the **Add Customer Info** button on the **Customer Admin** menu.
- The Customer Information and Edit button has replaced the **Customer Info and Edit** button on the **Customer Admin** menu.
- **New!** The Customer Sales button has been added to the **Customer Admin** menu. Click this button to access the Customer Sales screen.
- **New!** The Sales Orders button has been added to the **Customer Admin** menu. Click this button to access the Sales Orders for <customer> screen.
- The **Transactions > Interstore Receive** option has been removed from the **Firearms** menu. The **Interstore Transfer Receive** screen has also been removed from the system.
- **New!** The **Reporting >** Waiting Period Report option has been added to the **Firearms** menu. Click this option to access the Waiting Period Report screen.
- The **Required Attr/Desc Mass Define** button has been removed from the **Inventory Management** menu. The **Required Attr/Desc Mass Define** screen has also been removed from the system.
- The **Bulk Define Attr/Desc** button has been removed from the **Inventory Management** menu. The **Bulk Define Attr/Desc** screen has also been removed from the system.
- The **Mandatory PADs** button has been removed from the **Inventory Management** menu. The **Mandatory Product Attribute Descriptor Values** screen has also been removed from the system.
- The Add Employee Information button has replaced the **Add Employee Info** button on the **Employee** menu.
- The Employee Information and Edit button has replaced the **Employee Info and Edit** button on the **Employee** menu.

New! The Sales Orders and Quotes button has been added to the **Purchasing** menu. Click this button to access the Sales Orders and Quotes screen, the Sales Order Details screen, and the Quote Details screen.

New! The Sales Order History button has been added to the **Purchasing** menu. Click this button to access the Sales Order History screen and, from there, the Sales Order Details History screen.

New! The Firearm Reports button has been added to the **Reports** menu. Click this option to display a menu of options.

New! The **Firearm Reports >** Waiting Period Report option has been added to the **Reports** menu. Click this option to access the Waiting Period Report screen.

New! The Dashboard button has been added to the **Reports** menu. Click this button to access the Dashboard screen.

Inventory Management

Undefined Attributes

When the 2.6 install occurs, the system will automatically locate items having mandatory attributes with null (blank) values and replace these values with the "Undefined" descriptor. This will also be done for auto added items as needed when they are brought into the system.

Bulk Product Editing

The Product Maintenance screen has been updated with new **Bulk Edit** options.
The **Required Attr/Desc Mass Define**, **Bulk Define Attr/Desc**, and **Mandatory Product Attribute Descriptor Values** screens have been removed from the system.

Case Quantities

The Case Quantity screen has been updated to automatically adjust the associated QoH, Value on Hand, and Avg Cost values when a case quantity link is created.

Auto Replenishment

Onscreen elements associated with the **Auto Replenishment** (previously Auto Order) feature have been standardized for consistent naming and intuitive settings (i.e., Y or N). The following screens have been updated to reflect this standardization:

- Inventory Level screen
- Min/Max Import screen
- Product Maintenance screen
- Vendor Reorder Report screen (previously the **Vendor Reorder** screen)

Tax Types

The Tax Types screen has been updated with settings to control rounding behaviors.

Customer Transactions

Same-Day Class Registration

The user may now Register a Class Participant on the day of the class.

Membership Renewal Tools & Reminders

The **Register** application now includes these features that allow the user to identify memberships that require renewal and easily renew them for the customer.

- The **Memberships** portion of a customer's **Current** window displays a **Renew** button as well as a **Days Remaining** field for each applicable membership. Click a **Renew** button to add the membership renewal to the **Cash Register** screen as a transaction item.
- The **Cash Register** screen displays a **Renew** button and an expiration date if the selected customer has a membership that expires in the next 30 (or the previous 90) days. Click the **Renew** button to add the membership renewal to the **Cash Register** screen as a transaction item.

Firearms & Range

Waiting Period Report

The Waiting Period Report screen has been updated with a new format and may now be accessed directly from the **Firearms** and **Reports** ribbon menus.

Firearm Transaction Notes

The **Notes** fields on firearm transaction screens have been reconfigured and renamed to reflect a distinction between incoming and outgoing firearms:

- Notes for an outgoing firearm are now entered in the **Outgoing Notes** field.
- Notes for an incoming firearm are now entered in the **Additional Information** field.

The following screens have been updated to reflect this change:

- Firearm Sale screen
- Firearm Purchase screen
- Firearm Trade screen
- Transfer In screen
- Transfer Out screen
- Inbound Consignment screen
- Inbound Consignment Return screen