

Receiving a new shipment start to finish

A workflow playbook for AIM POS

This playbook walks you through receiving a new shipment into AIM, from the moment the boxes hit your counter to the moment the stock is live and ready to sell. Follow it in order. It covers both accessories and serialized firearms, and it shows you exactly where the A&D book fits in.

Before you start

A few things set the scope of this playbook.

- You are receiving new product from a supplier or distributor. Used inventory, consignments, and trade-ins follow a different process that AIM covers separately.
- You are entering this shipment by hand rather than through the purchase order module.
- You have your paperwork within reach. Keep the vendor invoice or packing slip next to you, or open the vendor's web portal, so you can confirm details as you work.

Two things have to exist in AIM before you can receive stock. Your manufacturers need to be set up, and each item needs an inventory SKU record. The first two steps take care of both, and then you receive the physical stock.

Step 1: Set up your manufacturers

► Watch: Manufacturer Table

Every product in AIM ties to a manufacturer, so start there. You can add manufacturers one at a time as you build inventory records, or you can load your common brands in bulk ahead of time.

1. Open the manufacturer table from **Maintenance > Inventory > Manufacturer Table**.
2. To load several brands at once, click Bulk Add, type one manufacturer per line in the pop-up box, and click OK.
3. To edit a brand, select it from the list on the left, change the fields on the right, and click Save.
4. To retire a brand you no longer carry, mark it inactive.

A clean manufacturer table keeps customers able to search by brand, supports your reporting, and stops the same brand from being entered twice under different spellings. If a brand does slip in twice, merge the two records with the Change Manufacturer utility under **Module > Inventory Utilities > Change MFG**.

Selling online? If you run an online store through Active-e, the brands in this table carry over to your storefront so shoppers can browse your catalog by manufacturer.

Step 2: Create the inventory record

► **Watch: Adding Inventory**, which covers both accessory and serialized items

AIM can only receive stock against a SKU that already exists, so any item new to your store needs a record first. Skip this step for items you have received before.

Open the form from **Modules > Inventory > Add/Change Inventory > Add Inventory**. On the Main tab, set the type. Choose Accessories for items you track in bulk, which covers most of your non-firearm stock. Choose Serialized for items you track by individual serial number, which is typically your firearms.

Add an accessory

1. Select the inventory category and subcategory that fit the item.
2. Enter the manufacturer in the MFG field. Type the name to match an existing brand, pick it from the dropdown, or type a new name and click Yes when AIM offers to add it to the manufacturer table.
3. Enter the manufacturer's model number in the Model field. AIM copies the model into both the SKU field and the MPN field, and you can override either one if your store uses different numbers. If no model or barcode exists, click the in-store SKU button (ISS) to have AIM generate a SKU for you.
4. Type the product name in the Description field. This is the name your customers see on receipts and the name that shows up on your inventory reports.
5. Select your primary vendor in the PR Vend field, then enter the vendor's item number if it differs from the SKU.
6. Scan or type the product barcode in the Barcode field.
7. Enter your cost, your retail price, and your selling price in the R price field. To have AIM calculate the selling price from a target margin or a percentage of retail, press F6 while you are in the R price field.
8. Set a minimum price if you want AIM to require permission before anyone sells below it. Add minimum and maximum reorder points if you want the item on your reorder report. Both are optional.
9. Click Proceed. AIM carries your entries onto the SKU tab. Click Save to move to the Locations tab and review per-location pricing.
10. Enter a starting quantity on hand only if you already have units of this accessory. This is the one time you set the quantity directly, because from here on you add stock through receiving in Step 3. Click Save to finish the record.

Add a serialized item

A serialized item follows the same path with two differences. You set attributes for the A&D book, and you handle serial numbers on their own tab.

1. Set the type to Serialized, then choose the category and subcategory. The subcategory controls whether AIM prompts you for an A&D book entry, so choose it with care.
2. Enter the manufacturer, model, and description the same way you did for an accessory.
3. Before you continue, click the Attributes button and fill in the fields the A&D book needs. Pick a value from each dropdown, or type a new value and confirm when AIM offers to save it. Click Save to close the attributes window, then click Proceed.
4. Review the SKU tab, then click Save to reach the Locations tab. For a serialized item the quantity field stays locked, because you add units by serial number.
5. Move to the Serials tab. If you already have units on hand, enter each serial number in the serial # field, or scan the serial number barcode. Do not scan the product UPC in this field.
6. Set the condition in the code field for each unit, choosing new, used, or refurbished, then confirm the cost and price.
7. Click Save. If the subcategory is set to prompt the A&D book, complete the acquisition entry, enter the next log number, confirm the details, and save. AIM records the entry in its A&D book, or pushes it to FastBound if you use that integration.
8. To add more units, click Add and repeat. Each serial number appears in the list on the left so you can track what you have entered.

Step 3: Receive the shipment into inventory

► **Watch: Receiving Inventory**, which covers steps 3 and 4

With your records in place, you are ready to bring the physical stock in. This is the step you repeat for every shipment. Open the form from **Modules > Inventory > Add/Change Inventory > Receive Inventory**. Your cursor lands in the SKU field.

You have three ways to pull up an item. Scan the SKU barcode from the package, type the SKU, or press F6 to search your inventory by description, model number, MPN, category, and more. When a serialized item has two barcodes, scan the product SKU barcode, not the serial number barcode.

Receive an accessory

1. Enter the item, then press Tab or Enter to move to the Quantity Received field.
2. Type the number of units you received.

3. Press Tab to reach the Received Cost field. AIM shows the cost from the item record. Change it if this shipment came in at a different cost, then tab through the price fields to adjust pricing if you need to.
4. Note a different vendor if this order did not come from your usual primary vendor, and record the purchase or invoice number if you track those.
5. Check the Print SKU Barcode box if you need a label for an item that arrived without one.
6. Click Save, then move to the next item or exit when the shipment is done.

Receive a serialized item and complete the A&D book

1. Enter the item the same way. AIM replaces the quantity field with the serial # field.
2. Scan or type each serial number, and enter every serial for that SKU before you move on. If you need to assign a serial number, use the in-store item option (ISI) to have AIM generate one.
3. Confirm the cost, pricing, and vendor for these units, since serialized items can arrive at different costs.
4. Click Save. If the item requires an A&D book entry, that form opens on its own with the vendor and firearm details already filled in.
5. Review every field on the A&D entry for accuracy and correct anything that is off. This record has to be right.
6. Click Save to enter the firearm into your inventory and your A&D book. If you use FastBound, the Save button reads Push to FastBound instead. If you exit this form without saving, the item does not enter your inventory.

Step 4: Confirm the shipment landed

Close the loop by checking that your stock is in the system.

1. Go to **Modules > Inventory > Display Inventory**.
2. Search for the item or enter its SKU to open the record.
3. Click the Receive button at the bottom of the form to see the full receiving history for that SKU, including the shipment you just entered.

All videos in this playbook

Each step above links to its video. Here they are in one place.

- ▶ **Manufacturer Table**
- ▶ **Adding Inventory**
- ▶ **Receiving Inventory**

When to call for help

You do not have to work through a tricky shipment alone. For a printable flowchart of the receiving process, check the AIM online manual under the receive inventory window. For hands-on help or training, contact the AIM technical support team.

This guide describes what AIM does on the screen. It does not replace your compliance responsibilities under ATF rules and is not legal advice.