Selling a firearm start to finish

A workflow playbook for AIM POS

This playbook walks you through selling a firearm in AIM, from the customer walking in to the disposition landing in your bound book. It covers the standard counter sale, the delayed delivery path for when a background check holds things up, collecting a balance on a held firearm later, and transferring in a firearm from another FFL. Where AIM's internal A&D book and FastBound differ, the playbook points it out.

> **Before anything else.** This playbook shows what AIM does on the screen. It does not replace your compliance responsibilities under ATF rules, including the 4473 and the background check. Run those according to your own store procedures and your own counsel. AIM records the sale and the disposition. It does not run the background check for you.

Before you start

A few things need to be in place before you sell.

- Your bound book method is set. AIM works with a paper bound book, its own internal A&D book, or FastBound. The disposition step near the end of the sale changes based on which one you use.
- Your integrations and system settings are already configured. The delayed delivery mode, the FFL transfer fee button, LeadsOnline, and FastBound each rely on a one-time setup that an administrator completes ahead of time, and each has its own video in the library.
- You are ready to meet your compliance obligations outside AIM, including the 4473 and the background check.

Step 1: Start the sale and pull up the customer

▶ Watch: The Point of Sale | ▶ Watch: Adding a New Customer

1. Click the orange money bag icon on the left side of the screen to enter Point of Sale mode. The customer search form opens.
2. Search for the buyer by phone number, name, or address. With live search on, the list narrows as you enter more detail. Double-click the customer, or highlight the name and press Enter.
3. If the buyer is new, click Add Customer and complete the form. You can scan the 2D barcode on the back of most driver's licenses to fill the fields automatically. A license does not carry a phone number or email, so ask for those if the customer is willing.
4. If you process 4473s through FastBound, click the FastBound 4473 button to pull the list of customers who have completed the form, then select your buyer. If their details differ from your

records, choose whether to keep your version or pull in the new information.

5. Once the customer is selected, they appear on the center info panel and on the green Sold To and Bill To buttons. Click the green account balance button to open the customer history if you need it.

Step 2: Add the firearm to the sale

▶ **Watch: Basic Firearm Sale**, which covers steps 2 through 5

1. With the cursor in the entry field at the lower right, scan the serial number barcode on the firearm, or type the serial number.
2. If you do not have the serial in hand, scan or type the SKU instead. Because the firearm is a serialized SKU, AIM shows the available serial numbers. Check the one you are selling and press Enter or click OK. To compare details first, press F6 to open Display Inventory and review the Serials tab for type, days in stock, and cost.
3. Confirm the firearm on the line items panel, where the subtotal, tax, and total fill in. To review or change the terms of this line, double-click it. This is also where you see the price levels, including the minimum allowable price.

Step 3: Take payment

1. Click the Tender button to open the payment menu.
2. Choose the payment method that matches your customer. To split the payment, enter an amount on the on-screen keypad and take the balance on another method.
3. If you use an integrated credit card processor, click Authorize Card to send the total and receive authorization back in AIM. If you do not, run the card on your separate terminal and enter the total there.
4. Once the full amount is tendered, the Tender button changes to Finalize Transaction.

Step 4: Complete the bound book disposition

▶ **Watch: FastBound Setup in AIM**, for the FastBound path

When you finalize, AIM handles the disposition based on your bound book method.

- Paper bound book. AIM opens the print option window, and you record the disposition in your paper book.
- Internal AIM A&D book. The A&D entry screen opens with the disposition side already filled in from the customer. Review it and click Save.
- FastBound. The same entry screen opens. Review it and click Push to FastBound.

> **Confirm the record.** Review every field before you save. AIM fills in the disposition from the sale, but the accuracy of the bound book entry is yours to confirm.

Step 5: Finish and print

1. Choose your print option. You can print a receipt, print to a laser printer, email it, or cancel the print.
2. To set a default so this screen skips the choice each time, have an administrator set it under **Maintenance** › **General** › **Workstation**.

The sale is complete.

When the delivery is delayed

▶ Watch: Delayed Delivery Process

Use delayed delivery any time you take money up front but do not hand over the firearm yet, such as during a background check delay. AIM holds the disposition until you actually deliver the firearm.

Enter the delayed sale

1. In Point of Sale, pull up the customer, then click the Delayed Delivery mode button at the very start of the transaction.
2. Enter the expected delivery date. This date prints on the receipt and does not move anything in the system on its own.
3. Add the firearm. You can assign the serial number now, or enter only the SKU and let AIM prompt you for the serial when you deliver.
4. Take payment. You can collect part now and charge the balance to the account. Finalize to print the receipt, which shows the delivery date.

Deliver the firearm later

1. Go to **Modules** › **Daily Posting** › **Delivery** and pull up the customer.
2. Select the open delayed delivery by its delivery date.
3. Right-click to tag the line, or enter the quantity delivered. If you did not assign a serial earlier, AIM prompts you to choose the serial number to dispose.
4. Click Save. The A&D entry opens for you to review the disposition, then click Save again. AIM prints a delivery receipt and a finalized invoice.

> **Delivering more than one held item?** Use Pull into POS on each delivery, then finalize them together.

> If a balance remains on either one, AIM prompts you to tender it.

> **Setup note.** This path depends on the delayed sale system variable being set so that held firearms are not treated as sold, and not disposed, until you deliver them. Confirm this setting with your administrator.

Collect a remaining balance later

▶ Watch: Using O/A Payment to Pay Off Remaining Balances

When a customer returns to pay off a held firearm, a layaway, or another balance, use O/A payment.

1. Go to **Modules › Daily Posting › O/A Payment** and pull up the customer.
2. Check the box next to each line item you are collecting on. AIM fills in the full amount, which you can change to a partial amount if needed.
3. Pay off several balances at once if you want to. Click Save to move to Point of Sale and collect the payment.
4. To leave money on account, use the Credit button to add a credit, along with an optional note.

> **Applying a credit.** At the tender screen, a red figure in the lower left shows the customer's available credit. Click Apply Credit, choose the credit line, and select it. If there are several credits, use Merge Credit first.

Transferring in a firearm from another FFL

▶ Watch: FFL Transfer Backend Setup and Usage

Use this when a firearm arrives from another FFL and you are transferring it to your customer for a fee.

1. Bring the firearm into your bound book first. Go to **Modules › Inventory › Utilities › Edit A&D Book Records** and add the record for the firearm you are transferring in.
2. In Point of Sale, pull up the customer taking possession, then click the FFL Transfer Fee button.
3. Enter your fee, or let it default if you set a standard price.
4. When AIM prompts for the A&D book serial number, enter the serial you brought in. AIM charges the fee and notes the serial on the line.
5. Take payment and finalize. The A&D entry opens for you to review the disposition. Confirm it, click Save, and print the receipt.

> **Tip.** Store the sending FFL as a customer with the FFL dealer type, and use the FFL Search button to fill in the license number, expiration, and business details. The FFL Transfer Fee button and its fee

> category are configured once by an administrator.

Where LeadsOnline fits

▶ Watch: LeadsOnline Setup, Do Not Buy, Submission

LeadsOnline reports your acquisitions and screens customers against Do Not Buy lists when you buy or take in a firearm, such as a purchase from an individual, a consignment, or a trade-in. It runs on buys and trades, not on a standard retail sale. When LeadsOnline is enabled and you buy or trade for a firearm, AIM checks the customer against the Do Not Buy lists before you finalize, then submits the acquisition afterward. For a straight sale, your screening runs through the 4473 and the background check outside AIM, and the disposition runs through your bound book as shown above.

All videos in this playbook

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

▶ The Point of Sale

▶ Adding a New Customer

▶ Basic Firearm Sale

▶ FastBound Setup in AIM

▶ Delayed Delivery Process

▶ Using O/A Payment to Pay Off Remaining Balances

▶ FFL Transfer Backend Setup and Usage

▶ LeadsOnline Setup, Do Not Buy, Submission

When to call for help

Every step here has a dedicated video in the AIM library, from the Basic Firearm Sale to Delayed Delivery, O/A Payment, and FFL transfers. To see any single step in full, watch the matching video. For hands-on help or training, contact the AIM technical support team.
