Delayed delivery and paying off balances

A workflow playbook for AIM POS

Use a delayed delivery any time you take money up front but do not hand over the firearm right away. This playbook covers the full path: the system variable that has to be set first, entering the delayed delivery at the counter, delivering the firearm later, and collecting whatever balance is still owed. Every step comes from the AIM training videos linked in each section.

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

Before you start

- Confirm the delayed sale system variable first. It controls whether AIM treats a delayed delivery as a sale right away or waits until you deliver, and it is the first thing the video checks.
- Have the customer in AIM. A delayed delivery is entered against a customer account, so you pull up the customer at the start of the transaction.
- Decide when you want to assign the serial number. You can assign it when you enter the delayed delivery, or leave it and AIM will prompt you for it at delivery.

Check the delayed sale system variable

> **Watch:** Delayed Delivery Process

This is a one-time check, and it decides how AIM treats every delayed delivery you enter afterward.

1. Go to **Maintenance** > **General** > **System Variables**.
2. Find the system variable named Delayed Sale.
3. Confirm the current value is set to 2.

> **What the value of 2 does.** With Delayed Sale set to 2, delayed deliveries are not considered sales and AIM does not prompt you to dispose of the firearm until it is delivered, rather than when the delayed delivery is entered.

Enter the delayed delivery at the counter

> **Watch:** Delayed Delivery Process

1. Go to the Point of Sale and pull up the customer account.
2. Click the delayed sale mode button at the very start of the transaction, before you add anything to the sale.
3. Enter the delivery date when AIM prompts you for it.
4. Add the item you are selling. If you select a serialized SKU without entering a serial number, AIM does not ask for one now.
5. Tender the transaction. You can take a partial payment, such as some in cash and the rest charged to the account.
6. Finalize the transaction and print the receipt. The receipt shows the delivery date in the top right, along with the item sold and the payment.

> **The delivery date does not deliver anything.** The date you enter shows on the receipt as an expected delivery date. It does not automatically deliver the item or do anything else in the system. You still deliver the firearm through the Delivery screen when the customer comes back.

Deliver the firearm

> **Watch:** Delayed Delivery Process

This is the second half of the transaction, and it is where the disposition happens.

1. Go to **Modules** > **Daily Posting** > **Delivery** and search for the customer.
2. Review the list, which shows all open current delayed deliveries for that customer, and select the one you are delivering.
3. Right-click and choose Tag Selected Line or Tag All Lines, or click into the quantity delivered field and enter the quantity you are delivering now.
4. If you did not assign a serial number when you entered the delayed delivery, AIM prompts you to pull in the serial number that will be disposed. Select it and click OK.
5. Click Save. AIM opens the A&D book so you can review the disposition details on the right side, then click Save there.

6. Take your receipts. The delivery receipt is proof of delivery to the customer and the date. The delivery finalized invoice shows the payments, the same as the receipt you got when you entered the delayed delivery.

Deliver more than one at once

> **Watch:** Delayed Delivery Process

Pull into POS is the button to use when a customer is picking up two or more delayed deliveries in a single transaction.

1. Go to **Modules** > **Daily Posting** > **Delivery**, open the customer account, and select the first delayed delivery.
2. Right-click, tag the line, and click Pull into POS. The line appears in the Point of Sale.
3. To add another one, click your delivery button. This is a launch form button type set to model delivery. AIM has a separate video on adding Point of Sale menu buttons if you do not have this button yet.
4. Select the second delayed delivery and click Pull into POS as well. Both delivery lines now show in the same transaction.
5. Finalize. If there is no balance left on either one, there is nothing to pay. If a balance is still owed on either delayed delivery, AIM prompts you to tender instead.
6. Answer any prompt attached to a line as it comes up. In the video, one of the deliveries was an FFL transfer fee, so AIM brought up that pop-up before saving.
7. Click Save. From here you get the standard receipts you would get from a single delayed delivery.

> **Charging an FFL transfer fee?** See the "Setting up FastBound, LeadsOnline, and FFL transfers" playbook for the fee category and system variable behind that button.

Pay off remaining balances with O/A Payment

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

O/A Payment is where you collect what a customer still owes across their account. It handles layaways, delayed deliveries, and charge sales, and you can settle several at once in a single payment.

1. Go to **Modules** > **Daily Posting** > **O/A Payment** and pull up the customer account.
2. Check the header before you start. The top left shows the customer name, a box to change location, a box to change tax authority, a reference number box, and a date box if you want to backdate the transaction. The right side shows total credit and total deposit.
3. Select the line items you are paying with the check box on the far left. AIM fills in the full pay amount automatically.
4. Change the amount if the customer is paying less than the full balance. Click into the pay amount box, type the amount, and press Enter. The amount to pay updates to match.
5. Select as many line items as you need. You can pay off a layaway and a delayed delivery at the same time, and AIM totals them for you.
6. Click Save. AIM takes you into the Point of Sale to collect payment for everything you selected.
7. Take the payment and finalize the transaction. The O/A payment receipt shows the customer everything they paid, including the invoice numbers, the dates they are from, and any note you added.

The other buttons on the O/A Payment screen

- Disperse amount is for calculation only. Enter what the customer handed you and AIM shows how much is left as you check off invoices. You do not need it to take a payment.
- Order is for an order deposit. If the customer has an outstanding order, AIM lets you make a credit against it. If there is no outstanding order, AIM tells you so.
- Credit puts a credit on the customer account. Enter the credit amount, and use the box below it for a note, such as the reason for the credit. The note displays on the credit for you to view later.
- Clear All Invoices unselects everything, and Select All does the opposite.
- Master lets you enter a master ticket number, which automatically selects all line items to pull in and be paid.

Use a credit on a later sale

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

Once a credit is on the account, you apply it at the Point of Sale like any other form of payment.

1. Ring up the item in the Point of Sale and go to Tender.
2. Look at the bottom left. The red number shows how much credit that customer has on their account in total.

3. Click the Apply Credit box. AIM lists each line of credit and any order deposits on the account.
4. Double-click the credit you want, or click Select in the bottom right corner. If the customer has multiple credits, use the Merge Credit button to combine them first.
5. Confirm you want to use the full amount and press Enter. The applied credit shows on the transaction.
6. Finalize the transaction.

All videos in this playbook

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

Delayed Delivery Process

Using O/A Payment to Pay Off Remaining Balances

When to call for help

Every step here has a dedicated video in the AIM library. To see any single step in full, watch the matching video. 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 and state rules and is not legal advice.