Setting up FastBound, LeadsOnline, and FFL transfers

A setup playbook for AIM POS

This playbook covers three setups you do once. FastBound receives the A&D book records AIM sends it. LeadsOnline submits your buys and trades and runs the Do Not Buy check. The FFL transfer fee setup lets you charge for a transfer and log the disposition in the same transaction. Each one is demonstrated end to end in the AIM video library, and every step below comes from those videos.

> **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 any Do Not Buy obligations. Run those according to your own store procedures and your own counsel. AIM records the acquisition and the disposition. It does not make the eligibility decision for you.

Before you start

- Most of this work happens under the Maintenance menu, and some of it sets system variables.
- Have your credentials in hand. FastBound requires your account name, account number, API key, and email address, all of which you collect from your FastBound site. LeadsOnline requires your store ID and your API username and password. If you are unsure what your LeadsOnline credentials are, contact LeadsOnline support before you begin.
- Know which locations each one covers. FastBound is set to a location through Manage Locations, and LeadsOnline asks you to enter each location you want tracked along with its store ID.

Set up FastBound

> **Watch:** FastBound Setup in AIM

FastBound setup runs in three parts. You create a customer default that FastBound will use, you enter your credentials, and you convert any bound book records you already have in AIM.

Part 1: Create the organization customer default

Do this first, because the FastBound setup screen asks for it later.

1. Go to **Maintenance** > **Customer** > **Customer Defaults**.
2. Click the Add button in the bottom right, and select your next available code number.
3. Set the bill type to Open Item and the bill cycle to Cycle A.
4. Enter Organization in the description field, then click Save and Exit.

Part 2: Enter your FastBound credentials

1. Go to **Maintenance** > **ActivE** > **ActivE Setup**, and select FastBound from the list on the left-hand side.
2. Open your FastBound site in a browser to collect the credentials. Click the person icon in the top right, go to Accounts, find your store name, and select Settings on the right side.
3. Copy the name, the account number, the API key, and the email address from FastBound into AIM. If you do not have an API key yet, click Generate in FastBound and it will display on screen so you can copy it.
4. Click Add once all of the credential fields are filled in.
5. Go to Manage Locations and select the location this account is for.
6. Open the Customer tab. Set the contact ID attribute to your FastBound contact ID, set the customer default to Cash Customer, and set the organization default to the Organization customer default you created in Part 1.
7. Open the Miscellaneous tab and choose your options. These are personal preference, and the three most commonly enabled are Check for Available 4473, Automatically Update Items, and Automatically Update Vendor Information.
8. Set your barrel length attribute at the bottom of the Miscellaneous tab, then click Save.

Part 3: Convert your open A&D book records

If you already have open records in your AIM A&D book, AIM prompts you about them when you save your setup.

1. When you save your setup, AIM tells you that you have open A&D book records that have not been sent to FastBound. Click OK on that message.
2. Click Convert Open A&D Book to FastBound in the bottom right-hand corner.
3. Confirm you are on the correct account, then click Send to FastBound.
4. If AIM shows a screen for FastBound item types that are not set up, click into the right side and fill in the information it asks for, then click Save.
5. The conversion runs from there. When it finishes, you are live on FastBound.

> **If AIM finds nothing to convert.** The conversion prompt only appears when you have open A&D book records that have not been sent to FastBound. If you do not see it, there was nothing waiting to convert.

Set up LeadsOnline

> **Watch:** LeadsOnline Setup, Do Not Buy, Submission

LeadsOnline covers the buy side of your business. It submits your acquisitions and screens the person selling to you against Do Not Buy lists.

1. Go to **Maintenance** > **ActivE** > **ActivE Setup**, and select LeadsOnline from the list on the left-hand side.
2. Enable the integration, then enter each location you want tracked in LeadsOnline along with its store ID.
3. Enter your API username and password. If you are unsure what your LeadsOnline credentials are, contact LeadsOnline support.
4. Confirm that Autosubmit Buys, Autosubmit Trades, and Autocheck Do Not Buy are all checked. Autosubmit Buys sends any consignments or purchases made in AIM to LeadsOnline. Autosubmit Trades sends received trade-ins. Autocheck Do Not Buy runs the customer against LeadsOnline's Do Not Buy lists before you finalize a buy or a trade.
5. Optionally, choose to upload images along with the submission. AIM can send the images associated with the customer, the latest signature it has on file for them, and any images associated with the item.
6. Click Save. For the remaining optional settings, use the tool tips, the documentation, or contact AIM support.

What the Do Not Buy check looks like at the counter

- The check runs against your customer before you finalize a buy or a trade. AIM submits the customer's name and date of birth.
- If the customer matches a list, AIM displays a grid showing the agencies whose description matched your customer.
- Continuing past a match requires a security permission.
- Once the acquisition is finalized, the transaction appears in LeadsOnline, including any customer images, signature, and item images you chose to send.

> **This is a screening tool, not a decision.** The Do Not Buy check and your 4473 and eligibility steps are your compliance responsibility. Run them according to ATF and state rules.

Set up FFL transfers

> **Watch:** FFL Transfer Backend Setup and Usage

An FFL transfer has two moving parts. You charge the customer a fee, and you log the firearm through your bound book. AIM ties them together so one transaction handles both, but it needs a fee category and a system variable pointed at it first.

Part 1: Point AIM at your transfer fee category

1. Go to **Maintenance** > **Ledger** > **Non-Inventory Categories** and confirm you have an FFL transfer fee category to sell. Open it and check that the description reads FFL Transfer Fee, the tax code is Tax Exempt, and it points to your FFL transfer fee ledger.
2. Write down the category number.
3. Go to **Maintenance** > **General** > **System Variables** and find the variable named FFL Transfer Fee Cat.
4. Enter your category number on the current value line, then save. If you have more than one transfer fee category, separate the numbers with a straight bar.

Part 2: Run a transfer at the counter

1. Go to **Modules** > **Inventory** > **Utilities** > **Edit A&D Book Records** and add the record for the serial number you are transferring out.
2. Go to the Point of Sale and pull up the customer who is taking possession of the firearm.
3. Click the FFL Transfer Fee button. You can set a default price or type the amount in each time.
4. Enter the serial number at the Enter A&D Book Serial Number prompt and save. AIM charges the fee and notes which serial it applies to.
5. Take payment and finalize the transaction. AIM opens the A&D book window so you can review the disposition information.
6. Confirm the disposition is correct, click Save, and print the receipt.

Part 3: Add the transfer fee button to your Point of Sale screen

This step is optional. It puts the transfer fee button on your main Point of Sale screen so it is easier to get to.

1. Go to **Maintenance** > **General** > **Point of Sale Menus**.
2. Right-click any existing button and select Copy Button, then right-click in open space and select Paste Button.
3. Hold left-click and drag the new button where you want it to sit on the screen.
4. Right-click the new button and choose Set Change Function. Set the button type to Non-Inventory Category and select your FFL transfer fee category.
5. Enter a quantity of one and the price you normally charge. If you would rather enter those at the counter, you can set the button to prompt for price, or to prompt for quantity, or both.
6. Click Default to fill in the FFL transfer fee name, click OK, and save. The button is ready the next time you open the Point of Sale.

Confirm your setup is working

Each of these three setups gives you a way to confirm it took, without waiting for a real customer to find the problem.

- FastBound is live once the conversion of your open A&D book records completes.
- LeadsOnline is working once a finalized acquisition appears in your LeadsOnline account, along with any images and signature you chose to send.
- Your FFL transfer setup is working once the FFL Transfer Fee button prompts you for an A&D book serial number and the disposition window opens when you finalize.

With these three in place, the workflows that depend on them are ready to run. See the "Selling a firearm start to finish" and "Taking in a used firearm" playbooks for what your staff does at the counter.

All videos in this playbook

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

FastBound Setup in AIM

LeadsOnline Setup, Do Not Buy, Submission

FFL Transfer Backend Setup and Usage

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. If you are unsure of your LeadsOnline credentials, contact LeadsOnline support. For hands-on help or training on the AIM side, 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.