

Overview

Switching to TacticalPay POS from another platform? Good news — importing your existing **inventory** and **bound book** is a quick, painless process. You fill out two templates, email them to us, and our team loads them into your new POS for you. Most imports are completed within one to two business days of receiving clean files.

What You'll Need

- An export (CSV or Excel) of your current **inventory** from your existing POS or spreadsheet.
- Your current **bound book** / **A&D record** in any digital format you can copy from.
- The two TacticalPay templates linked on the Knowledge Base page where you downloaded this guide: **bound_book_template.xls** and **BPOS_Import.xlsx**.

The Process at a Glance

- **Step 1.** Download the two templates from tacticalpay.com/knowledge-base.
- **Step 2.** Export your inventory and bound book from your current provider.
- **Step 3.** Paste your data into the matching columns of each template (details on the next pages).
- **Step 4.** Email both completed templates to **POS@TacticalPay.com**.
- **Step 5.** Our team reviews the files, flags any questions, and loads everything into your POS.
- **Step 6.** We confirm the counts back with you and you're live.

Tip: Don't want to do this yourself? We can take your raw data export from your old system, clean it up, and import it for you for a fee — typically **\$200–\$350** depending on volume. Just email **POS@TacticalPay.com** with your raw files and let us know which platform you're coming from.

Filling Out the Bound Book Template

The **bound_book_template.xls** mirrors the standard ATF bound-book / A&D record structure. It has three logical sections: firearm details, acquisition (“In”), and disposition (“Out”). Any column labeled **(optional)** can be left blank. Open-acquisitions (firearms still in inventory) should have the Out columns left empty.

Firearm Details

- **Serial** — the firearm’s serial number, exactly as engraved. Required.
- **Manufacturer** — e.g., Glock, Smith & Wesson, Ruger. Required.
- **Importer** (optional) — only if the firearm was imported and the importer is marked separately.
- **SKU** (optional) — your internal product/stock code, if you use one.
- **Model** — e.g., G19 Gen 5, M&P 9 Shield. Required.
- **ProductNote** (optional) — finish, barrel length, condition notes, anything useful.
- **Type** — pistol, rifle, shotgun, receiver, etc.
- **Caliber** — 9mm, 5.56, 12 GA, etc.

Acquisition (“In”)

- **DateIn** — the date the firearm was acquired (MM/DD/YYYY).
- **Cost / Retail** (optional) — your cost basis and intended retail price.
- **FFLIn** — the source FFL number. Required if **CompanyIn** is filled out.
- **CompanyIn** — the business you received the firearm from. Use this **OR** the Name fields, not both.
- **NameLastIn / NameFirstIn / NameMiddleIn** — for individual transfers (private parties, customer trade-ins).
- **StreetAddressIn, StreetAddress2In, CityIn, StateIn, ZIPIn** — source address. Address is optional if FFLIn is provided.
- **NumberIn / EmailIn** (optional) — source contact info.
- **AcquisitionNote** (optional) — free-text note for this acquisition.

Disposition (“Out”)

- **DateOut** — the date the firearm left your inventory. Leave blank if still in stock.
- **FFLOut** — the receiving FFL number. Required if **CompanyOut** is filled out.
- **CompanyOut** — the business that received the firearm. Use this **OR** the Name fields.
- **NameLastOut / NameFirstOut / NameMiddleOut** — for transfers to individuals.
- **StreetAddressOut, StreetAddress2Out, CityOut, StateOut, ZIPOut** — destination address.
- **NumberOut / EmailOut** (optional) — destination contact info.
- **TransactionOutID** (optional) — your reference number for the sale or transfer.
- **DispositionNote** (optional) — free-text note for the disposition.
- **Lost / Stolen** (optional) — mark with an X (or Yes) if the firearm was lost or stolen.

Note: For each “In” and each “Out”, you must fill out **either** the Company fields **or** the Name fields — not necessarily both. If the source/recipient is an FFL, use the Company fields. If it’s an individual, use the Name fields.

Filling Out the Inventory Template

The **BPOS_Import.xlsx** template loads your non-serialized inventory (and starting stock counts) into the POS — ammunition, accessories, apparel, optics, and any other SKUs you carry. Firearms in the bound book are tracked separately; you don't need to duplicate them here.

Product Identity

- **Name** — the product name as you want it to display on receipts and the register screen.
- **SKU** — your stock-keeping unit / barcode. Keep this unique per product.
- **Description** — optional longer description for staff or your e-commerce listing.
- **Class** (also called **Inventory Groups** inside the POS) — your top-level category (e.g., Ammunition, Optics, Apparel, Cleaning, Accessories).

Pricing

- **Retail Price** — the price the customer pays at the register.
- **Min Sale Price** — the lowest price a staff member can sell this at (used for MAP enforcement / discount limits).
- **Purchase Price** — your cost from the distributor or manufacturer.

Stock Levels

- **Current Stock** — how many units you have on hand right now.
- **Minimum Stock** — the reorder threshold; the POS flags items at or below this number.
- **Maximum Stock** — the par level you want to keep on the shelf when restocking.

Tip: **Class / Inventory Groups** is your top-level category. You don't need a perfect taxonomy on day one — a handful of broad classes (Firearms Accessories, Ammunition, Optics, Apparel, Cleaning & Maintenance) is plenty. You can refine into sub-categories and departments inside the POS after launch.

Note: You may notice a few unlabeled columns in the middle of the template — those are placeholders we don't currently use. Just leave them empty and fill in the labeled columns.

Common Errors to Avoid

These are the issues that slow down imports most often. A quick check before you send the files saves a round-trip with our team.

Don't Modify the Template Structure

- **Don't rename the column headers.** Leave the top row exactly as it shipped — the importer maps by header name.
- **Don't rearrange the columns.** Keep them in the original order.
- **Don't delete columns** — including the unlabeled placeholder columns in BPOS_Import.xlsx. Just leave unused columns empty.
- **Don't add new columns** beyond what the template provides. Any extras get ignored or break the import.
- **Keep your data on the original sheet only.** Don't add additional tabs or move data to a new worksheet.
- **No blank rows between records**, and no summary or totals rows at the bottom of the data.
- **Save in the same file format the template came in** (.xls for the bound book, .xlsx for inventory).

Watch Your Data Formatting

- **Excel stripping leading zeros** from serial numbers, SKUs, ZIPs, or phone numbers. Format those columns as **Text** in Excel *before* you paste data in.
- **Date columns formatted as numbers** (e.g., 45678). Format DateIn / DateOut as **Short Date** (MM/DD/YYYY).
- **Merged cells.** Please unmerge before sending — merged cells break the import.
- **Listing firearms that haven't physically been received yet.** Only include items currently logged in your A&D book.
- **Duplicate SKUs** in the inventory template. Each row needs a unique SKU.

Sending It In

Once both templates are filled out, email them as attachments to **POS@TacticalPay.com**. You'll get a confirmation reply within one business day.

What Happens Next

- We review both files and flag anything that looks off (missing serials, unclear classes, etc.).
- We email you with any questions or assumptions we'd like to confirm.
- We load the data into your POS and run a sanity check on counts and totals.
- You get a summary email with the row counts loaded, ready for you to spot-check before go-live.

Tip: Use the email subject line “POS Import — [Your Business Name]” so we can route it to the right person on the onboarding team immediately.

Note: Questions? Reply to your TacticalPay onboarding email or write to **POS@TacticalPay.com**. You can also find the latest version of this guide — along with the two templates — on our Knowledge Base at tacticalpay.com/knowledge-base.