

LeadsOnline

Introduction

Edge is now integrated with **LeadsOnline**, a database of second hand transactions, giving you the ability to **upload Trades transactions** electronically into your LeadsOnline database for tracking potential theft nationwide with **real-time customer validation** at POS. **LeadsOnline is free for businesses** and **does not require** an additional separate Edge subscription.

Simply enable the feature through a series of new **System Options** and Edge handles the rest at POS based on your set options. With these options you can instruct Edge to **Always Upload Trades**, **Prompt at POS** for each transaction, or **Never Upload**. Access a record of your submitted Trades at any point conveniently through the LeadsOnline Production Site.

Getting Started

The **LeadsOnline integration** is activated using **LeadsOnline API credentials provided to you by LeadsOnline** and are Edge integration specific credentials. If you do not already have an existing **LeadsOnline** account, one can be created for free through the **LeadsOnline website**. Once registered, **LeadsOnline Support** will provide credentials and instruct you on **how to log in** and **verify transactions** have gone through successfully.



Existing LeadsOnline users may request API Credentials by contacting support@leadsonline.com and being sure to state that you need **API Credentials** for your **POS software – Abbott Jewelry Systems**.

Signing Up with LeadsOnline

For any stores not already signed up with LeadsOnline may register for free following the steps below:

1. Visit their website or follow the link below which takes you directly to the registration page:
[LeadsOnline - Register Business](#)
2. Fill out the **Account** and **Contact** sections then proceed to the **Business Information** section.
3. With some exceptions, most stores will select **Secondhand Dealer** for **Business Type**.

These fields below **MUST** be filled out as shown, as this alerts **LeadsOnline Support** you require those API Credentials: **POS System** - select '**OTHER Software**' and for **Other** - type in '**Abbott Jewelry Systems**'

Business Information

Business Type: *

Company Name: *

Business Name: *

Same as company name

Location Number: * if you have only one location, use "*" as your location number

Items Accepted: Jewelry Firearms Other (coins, electronics, games, musical instruments, tools, etc.)

Closed Days: Important: Select only the days you are CLOSED!
 Sun Mon Tue Wed Thu Fri Sat

POS Software: * Help with this

Other: *

- Click **Submit** to register. A **LeadsOnline Support** member will contact you and provide the **API Credentials** to complete your Edge integration, as well as walk you through **logging in** and **verifying transactions** on the **LeadsOnline production site**.

Setup

Once you have your **LeadsOnline** credentials, the next steps are to enter them into Edge and set your **System Options** and **Associate Permissions** for any employees who should be allowed to **override** the LeadsOnline security check at POS. Your credentials only need to be entered **once**, as this **activates** your integration.

Activating LeadsOnline Integration in Edge

To enter your **LeadsOnline** credentials:

- Navigate to **Administrative > LeadsOnline > Credentials**. The **LeadsOnline Credentials** window will appear.

- Enter your **Leads Business ID #** in the **Store ID** field, as well as your **LeadsOnline username** and **password** and click **Validate**.

- If your credentials were entered **correctly**, you will receive **confirmation** your LeadsOnline integration was successful. If your credentials were not entered correctly, you will receive a message that your credentials were incorrect.

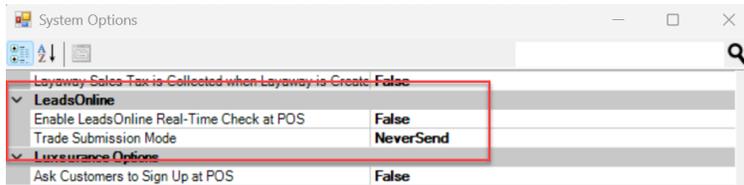
NOTE: If you're unsure of your credentials, you must **contact LeadsOnline Support** to retrieve your correct credentials before trying again.

- When you receive confirmation that your credentials are correct, click **OK** to activate your **LeadsOnline integration**.

System Options

To set the **System Option** for LeadsOnline:

1. Navigate to **Administrative > System Options**.
2. **Search or scroll down to the LeadsOnline section.**



Enable LeadsOnline Real-Time Check at POS

When enabled (set to True), POS enforces LeadsOnline real-time customer validation at POS. This makes a driver's license required for Trade/Buy transactions and will check the customer against their 'Do-Not-Buy' list using that license number. This option is set to False by default.

Trade Submission Mode

Controls how **Trades** are sent to **LeadsOnline** once the sale is completed. There are 3 available choices:

- a. **Never Send** – The system Default option. This means Trade Submission is Disabled and will never send to LeadsOnline.
- b. **Prompt at POS** - A prompt will appear asking the user to select whether or not to send Trade to LeadsOnline.
- c. **Always Send** - Will automatically send all Trades to LeadsOnline after sale completion.

3. Make your selections and click **Save** to apply your changes.

Associate Permissions

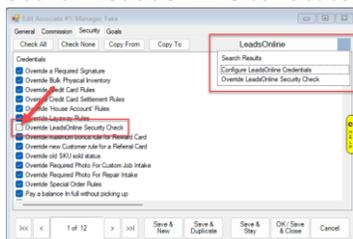
In addition to the permission that allows you to enter your LeadsOnline credentials, there is an **optional second Associate Permission** labeled '**Override LeadsOnline Security Check**' which grants your Associates permission to **override the LeadsOnline security check** that alerts you the customer is on the **Do Not Buy list** and lets them proceed with completing the sale.



This permission **only** applies to those who **enabled** (set to **True**) the '**Enable LeadsOnline Real-Time Check at POS**' System Option.

To set the **Associate Permissions** for LeadsOnline:

1. Navigate to **Administrative > Associates > Associate List**.
2. Search **LeadsOnline** to locate the permissions.

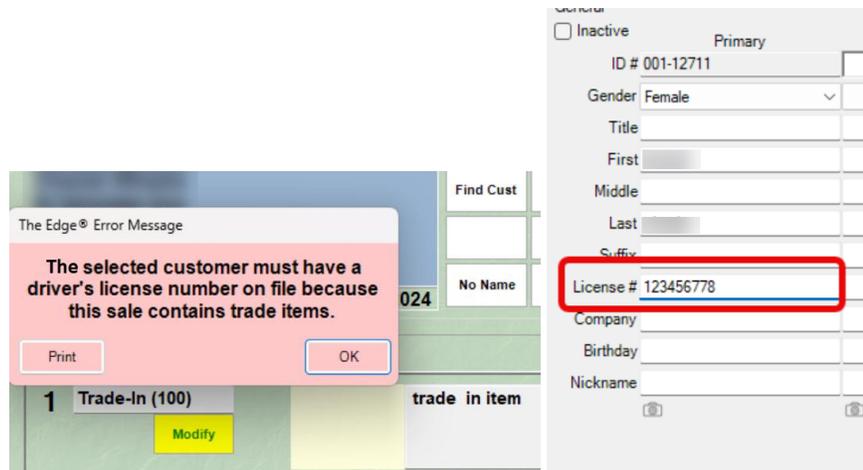


3. Check the box on the **Permission line** and select a **Save** option to apply the permission.

LeadsOnline at POS

Processing a sale at POS with **LeadsOnline** begins like any normal sale at POS. First you will **Find or Add the Customer** and select the **Associate**, as normal, then add your desired sale lines for the transaction.

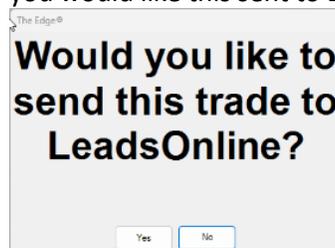
The **LeadsOnline security check** is performed by checking a Customer's **driver's license** against their '**Do-Not-Buy**' list. This means a license is **required** for customer validation to be conducted. **Edge will alert you when a license is missing** from the Customer Record and allow associates to add it to the **License # Field** on the **Customer Record** for the security check.



This license required security check will **only work** if you have **System Option** for '**Enable LeadsOnline Real-Time Check at POS**' enabled (set to **True**). Set to **False**, the security check will **not occur**, and you will **not** be required to have a license on file. The sale will **still be uploaded to LeadsOnline** based on your setting for the '**Trade Submission Mode**' **System Option**.

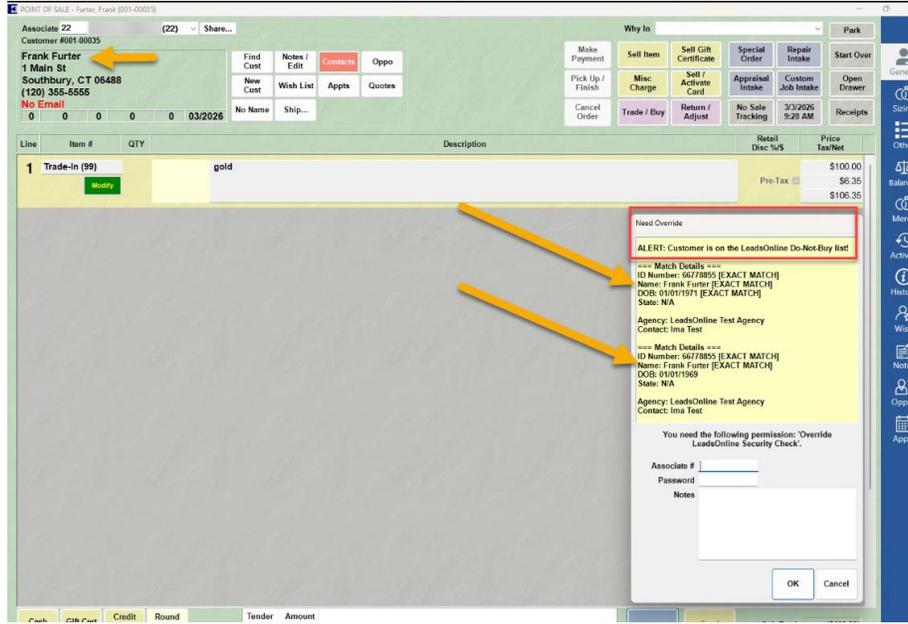
Once the **License #** has been added, what happens next when you or your associates **click Done** is determined by your **System Options**.

If you set the '**Trade Submission Mode**' **System Option** to prompt at POS, then a prompt will appear asking if you would like this sent to LeadsOnline.



If you set the '**Trade Submission Mode**' **System Option** to **Always Send** or to **Never Send**, then you will **not** see any notification when clicking **Done**.

If a **customer does not pass** the security check and an associate clicks **Done** to complete the transaction, an override window will appear alerting you that they are on the **'Do-Not-Buy'** list and an **override is required** to complete the transaction, as well as include the **Customer details** to confirm the match.



Tracking LeadsOnline Transactions

Trade/Buy transactions sent to LeadsOnline can be tracked and managed through your **LeadsOnline Production Site** as instructed by the **LeadsOnline Support** representative at the time of registration.

