FORWARD

A Publication From NSA

Your Vision | Our Mission

Taking Your Business to New Heights

Channel Partner infor Alliance Partner

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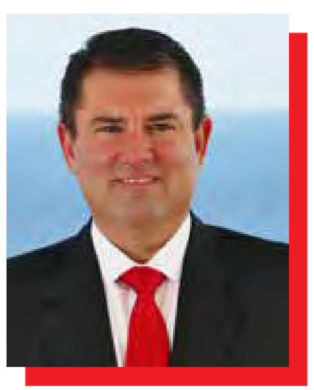
LETTER FROM THE PRESIDENT



At NSA, we make people a priority. Relationships make our business what it is and every one of us is invested in our partnerships. Every day our mission is to support our customers with a level of service that adds productivity and value to their business. Our team strives for nothing short of complete customer satisfaction.

We are thrilled to be at TUG Connects 2020. Multiple members of our team will be presenting over the course of the conference. Our sessions will provide insights and actionable steps that you can begin implementing immediately to help launch your business to new heights.

Stop by the NSA booth for a hands on demo, to meet some of our team or just to say hello. We look forward to seeing you in Dallas!

Your Partner in Success,

Patrick VanPutte

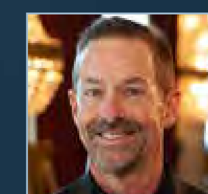
Patrick VanPutte
President & COO
NSA Professional Services

The Power of NSA's Team Will Turn You Into a CSD Superhero!

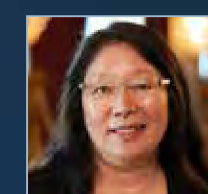
NSA SUPER SESSIONS

MARCH 8-11

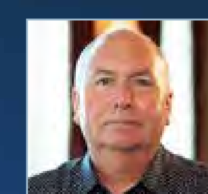
BILL SOCIE
- Hands On Session: Processing a Sales Order in WebUI / CSD
- Hands On Session: Processing a Purchase Order in WebUI / CSD
- Hands On Session: Processing a Warehouse Transfer in WebUI / CSD
- Warehouse Manager (WM) Overview



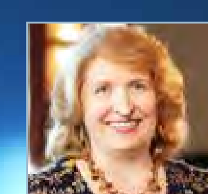
BRIAN WEAVER
- Optimizing eCommerce: Placing Orders and Getting Quotes on Your Website
- 2019 Ransomware Survey: Results & Trends from 2019



CAROL SHINYA
- Practical Tips I Can Do Now to Prepare My SX.e For a Migration to CSD
- What Should You Consider When Choosing On-Prem (OP) vs. Cloud (CSD)
- Product Sales and Sourcing Restrictions



COLIN RHYNO
- Product Import Module
- Pricing Maintenance - Update and Create Pricing Records



KATHY LUNDQUIST
- Customer Master Overview
- Easy as Excel: Ad Hoc Reporting for SX.e
- System Tables in WebUI / CSD

DISCOVER JUST HOW EASY IT IS TO BECOME A CSD SUPERHERO AT THE LIVE DEMOS BEING GIVEN AT OUR BOOTH!

ROB THAYER
- Post Provisioning a New CSD Tenant
- Understanding Dataflows, Monitors and Workflows

DID YOU KNOW?

MAINTAINING THE CUSTOMER PO# *AFTER* INVOICING

BY KATHY LUNDQUIST

"The customer won't pay for this order because the PO# is missing/ wrong. We need to fix it and send them a new invoice."

Sound familiar?

We run into this issue regularly when meeting with credit teams. They hear from the customer who requires a corrected invoice. Here are some of the ways companies handle it:

- Send the PO # in an email or over the phone, hoping that's sufficient (it usually isn't)
- White out (yes it's still a thing!), type over a printed invoice copy and scan to the customer
- Credit and rebill – copy order to RM order, invoice it, copy to a new order, enter the correct PO, invoice it. Say it isn't so…

If only the PO# field could be updated *after* the order was already invoiced. Did you know that you can maintain the PO# on orders at any stage other than canceled? And the invoice can be reprinted with the updated PO#? Wait, what?! When did they add that feature? Would you believe way back in 2011, version 6.1.001 GUI? This feature works in both GUI and CSD.

This is one of hundreds of examples of features in standard SX.e Distribution that customers are not leveraging, typical of under-utilization. Here are a few more for the AR C&C team:

- ARIC – Credit / Credit Exposure added long ago in GUI, 11.0.0.9 CSD
  Hint: Blank out the customer #, now access that screen
- AR Groups – Buh-bye split payments, added 6.1.040
- ARECR – Cash receipts REVERSAL!! added 11.19.9
- ARECE – Payment type added 11.19.6
- ARECE – Enter a list of invoices to pay, legacy CHUI, GUI
- AR Lockbox – Import to cash receipts from bank, added 4.0
- ARRCD – AR Days to Pay, added 3.2.140
- ARRCW – AR Early Credit Warning includes ship to, 6.1.080
- OERX – Pre-Invoice Exceptions Report, added 10.1.1

THERE ARE MANY REASONS THAT EMPLOYEES DON'T USE THESE FEATURES:

- They do not know about them
- They know about them but do not know how they work or when to use them
- I don't have the security for that feature, didn't know it existed
- There's just so much I can remember from training
- The person who knew about it no longer works here
- We're doing okay the way we do it today

During the BOR process, we review how a company is utilizing SX.e. The goal is not an upgrade, although that is always a good way to access new features. The purpose is to see how you are using the system today, and how you may get more value from your current investment. This is true whether a new CSD user or you've been on the system for years and used to (or still) call it Trend. During initial training, there is only so much you can absorb, so often you learn the basics and plan to learn more at some point in the future after the dust settles. Or you've upgraded multiple times, and tested to be sure nothing broke but didn't get much training on what's new. With upgrades, new features default to "turned off, no security". Without training, or reviewing the documentation in detail, you don't know what's changed. You can't test it because you don't have access and don't know it's there. And now, with CSD enhancements being rolled out monthly, there's a myriad of new features you may be missing.

That's where our team of senior business consultants can help – our focus is to help you with that learning curve, what's new, maybe find a few short cuts to make your job a bit easier. For additional information, contact **Kathy.Lundquist@NSACOM.com**.

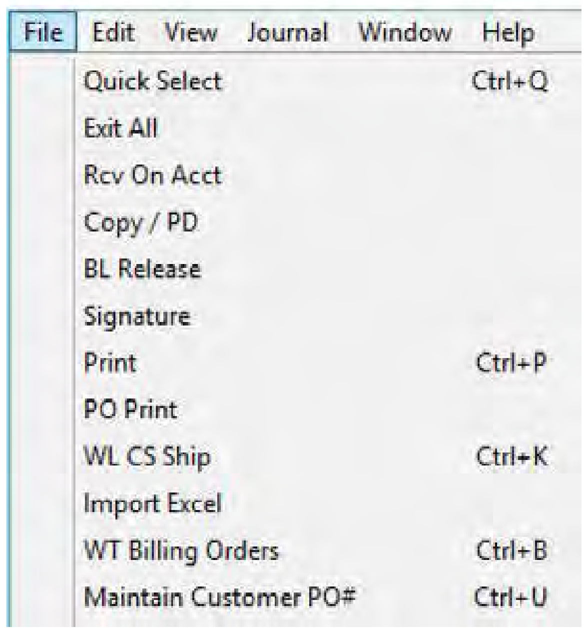
HOW TO MAINTAIN THE CUSTOMER'S PO# ON SALES ORDERS, ENTERED THROUGH PAID STAGE, WITH SCREEN SHOT EXAMPLE:

1. Security – SASO set "Allow Access to Maintain Customer PO#" to 'Allow' for appropriate staff.
2. OEET – Maintain Customer PO# - enter order #, the correct PO#, update
3. OERD – Reprint Invoice

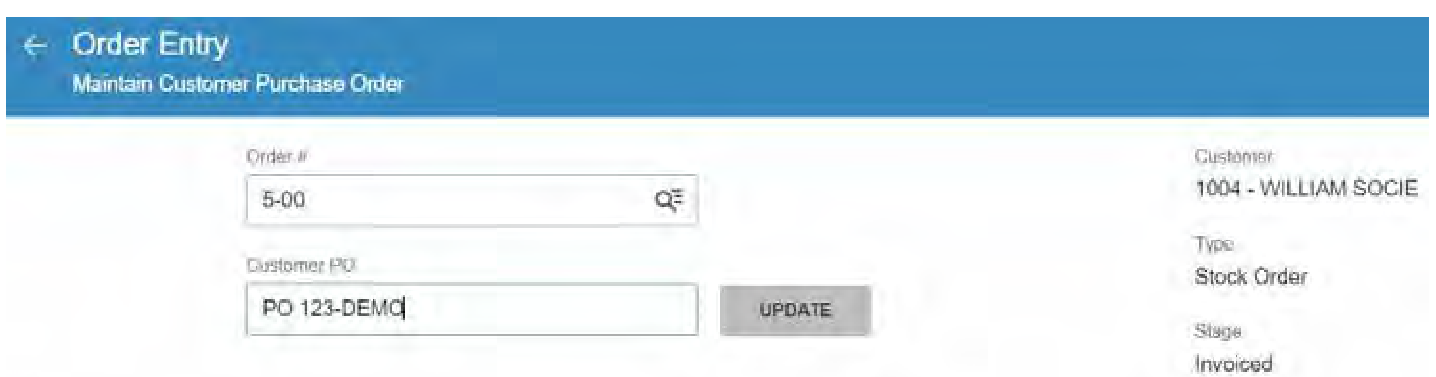
SASO – *SA Operator Setup Flag Setting:*

- (•) Allow Access to Maintain Customer PO#
- ( ) Do Not Allow Allow Access to Maintain Customer PO#

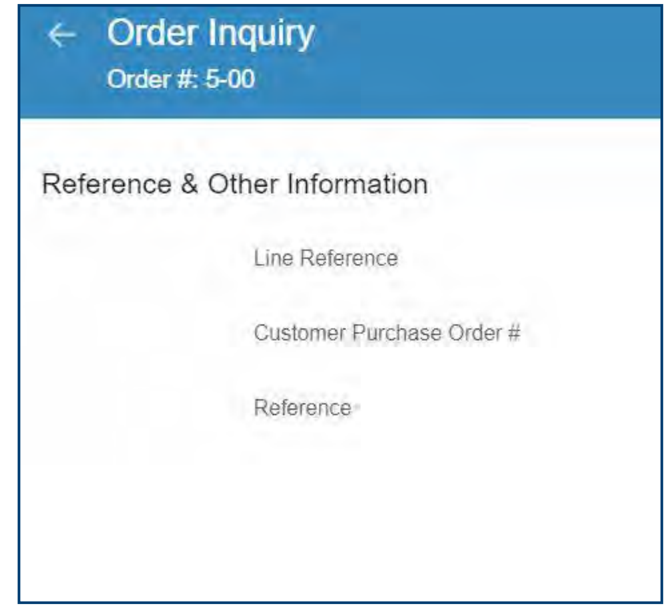
GUI – OEET Order Entry – *Maintain Customer PO#*



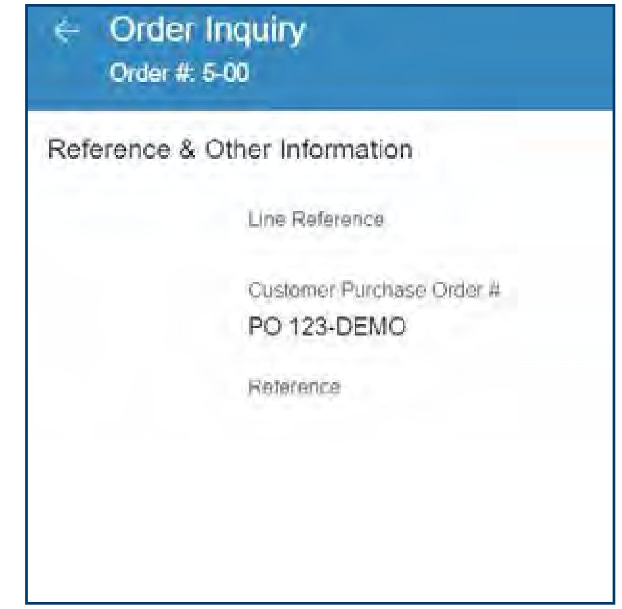
CSD – OEET Order Entry – *Maintain Customer Purchase Order*



OEIO Order Inquiry
BEFORE Maintaining PO#



OEIO Order Inquiry
AFTER Maintaining PO#



INVOICE BEFORE Maintaining PO#

Invoice Date	Due Date	Customer #	Invoice #
4/18/19	5/18/19	1004	5-00
PO Date	**PO #**		**Page #**
8/8/16			1

INVOICE AFTER Maintaining PO#

Invoice Date	Due Date	Customer #	Invoice #
4/18/19	5/18/19	1004	5-00
PO Date	**PO #**		**Page #**
8/8/16	PO 123-DEMO		1

DATA CONVERSION PROGRAMS – POST IMPLEMENTATION

BY COLIN RHYNO

Most SX.e/CSD users will utilize the standard data conversion toolkit for initially loading data into the SX.e database in preparation for going live with the software. What many fail to recognize is that there are conversion programs which can be used on an ongoing basis to add and maintain data.

The programs allow you to prepare your data using common tools like Excel or Access to manage the files before loading into SX.e. These tools offer powerful data manipulation services that are not available within SX.e. Features like:

- Identifying and removing duplicate records
- Manipulating columnar data
- Splitting one field into multiple
- Stripping out undesirable characters
- Combining data elements
- Translating to be consistent with the target format (dates, capitalization, etc.)

THE DATA CONVERSION PROGRAMS ARE OFTEN USED WHEN ADDING RECORDS TO VARIOUS SX.E TABLES.

A few examples are:

- Kit Bill of Materials (KPSK)
- Fabricated Products (VASP, VASPS)
- Customer Pricing Records (PDSC)
- Vendor Pricing (PDSV)
- Vendor Contract Pricing (PDSVC)
- Rebate Records (PDSR)
- Table Values (buyers, categories, ECCN codes, country codes and many more)
- Product Notes (NOTES)
- Contacts and Methods (CONTACTS, CONTACTS-ROLES)
- Budgets (GLSB)
- Product Cross References (ICSEC)
- Product Specific Units (ICSEU)
- Freight Bill Account Numbers (SASTF)

Many times, we see users setup custom tables (SASTZ) where they want to maintain extra data that may be needed for reporting purposes. They then proceed to manually enter the data into SX.e to populate the table when they could be importing it from a .csv file using a standard tool. After 30 years of working with SX.e, I try to do as much data maintenance as I can in tools that are designed to manipulate data and then import it into the database.

If you think you may have a need to programmatically load data and are not sure if there is a standard tool that already exists to help, feel free to call NSA. We can review what is available and the best way to use the existing tools. If you need custom loads or data manipulation, we can help with that as needed. Stop by our booth during TUG Connects or email me at **Colin.Rhyno@nsacom.com**.

SYSTEM HEALTH CHECK

BY ROB THAYER

It's that time again. Yes, you know... It's time a for a checkup.

You've been avoiding it like the plague because you're afraid you might find something that you don't want to find.

You're so busy you don't have time to think about it. You tell yourself you'll get to it but... you never do!

I probably don't need to tell you about the importance of keeping your systems in check. You know, you've heard it all before. Sometimes we just need to be reminded, so let me take this opportunity to do just that.

Think about your car. Your oil change is due. A few miles over isn't a big deal. But eventually, if left unchanged, the wear on your engine will increase dramatically and will shorten its lifespan. Or worse, it can break down when you aren't expecting it and it could be at the worst possible moment.

Working in this industry for over 20 years, I have learned that it almost always happens at the worst possible moment.

A **System Health Check** can uncover small problems before they become bigger. Left untreated they can and more than likely will turn into much bigger problems.

Companies that incorporate routine system checks and preventative maintenance measures reduce the risks and are able to recover more quickly when a problem does occur.

So, What Exactly is a System Health Check and What's Involved?

- **Backup Checks –** Are your backups valid? You might be getting successful backups but do you know if they can be restored successfully?
- **Database Health –** Adjust database settings, review extents, promon activity, word indexes, update statistics.
- **System Health –** System verification and check, system log file review, event viewer.
- **Performance Monitoring** – Review OS performance monitors, generate performance reports. File system fragmentation, driver updates
- **Clean Up –** Filesystems, directories, log files, unused applications, temporary files.
- **System Security –** Latest security patches or critical updates and virus definitions
- **Dump & Load –** Annual dump and load is recommended.

I know how you feel and what you're probably thinking but I have some good news for you. NSA is here to help!

We're here to help ease the burden when it comes to keeping your systems running in check.

Stop by our booth or email me at **Rob.Thayer@nsacom.com**

WHAT DOES **YOUR FORECAST** LOOK LIKE?

BY BILL SOCIE

When you want to start up a conversation with someone new, there are several commonly used topics. Given the polarization today, the topic of politics may produce far too many "F" sharps than most of us are comfortable with in polite conversation. So "How's the weather?" works. Typical responses you get the basic, "nice", "sunny", "rainy", or if you are from my area, "snowy". But those are not really the responses you are searching for if you want to keep the conversation going. You want some input.

What can I expect if I visit? What is the forecast and how accurate is the projection being provided? Is it from a barometer in your home, dropping as a storm approaches or is it based on national measurements, updated hourly as the storm approaches? If you say it is going to be sunny, I may start planning for a day off because I have not seen the sun in sooo long. But I don't want to waste a vacation day. If it is going to rain, I want to find that umbrella hidden in the back of the closet, needlessly carried all day if it does not.

If I am having the conversation with you, I may fall back on the old tried and true, "How's your business going?" If your answers are "Good", "Holding our own", "Doing ok considering the market", my curious nature wants to know more. I live in Buffalo. If something is coming, I want to know more. It is good compared to what? As in the weather conversation, how can planning be done with such ambiguous answers? What are you basing that on? What are you monitoring, forecasting with and how often are they checked?

The buzz a few years back was to create a data warehouse. A place to store all things happening in your company so that information could be used for metrics or trending. But like a true brick and mortar building, what it contains is only what you control, what you already know. What happened in the past? It does not give you any clue what the climate is outside. It is also very rigid. It needed to be more fluid. A place that would be fed by multiple streams. Like a lake…yes a Data Lake. Now you can start determining what external winds are blowing, causing the ebb and flow of your business. That is if you include the data streams truly affecting your business and understand how they are. Assuming you get this 100% correct. You know why your business is "good", now what? What if the answers require change? You have a forecast. What's your plan?

It is common knowledge a business should have a five year plan. Most do, but that plan is not something you can frame and mount on the wall. It is a rolling 1,825 days. Five years from today will be different than five years from yesterday or tomorrow. Creating a five year plan is a mile stone, not a finish line. It is a never ending series of next step mile stones which are constantly set and changed. Waiting for an annual meeting for review and adjustments would be like waiting for an employee's annual review to bring all the year's actions up for correction. You would have missed improvement opportunities to both. How do you determine what new influencers are in play and compensations need to be put in place? You are building a forecast. What's your plan to keep it updated?

You don't need to be a multi-national company to experience work silos. Once a business grows to more than one person, responsibilities are divided. You work in your area, making improvements, setting goals, setting up work flows, all based on what you are experiencing in your part of the business. Your data warehouse. How are other streams of information from others with different responsibilities being collected and incorporated into your decision making? Do you have regular S and OP (Sales and Operations) meetings? Expose people to others with different perspectives and opinions. Knowledge is power, lack of it is ignorance. If the weather is changing, does everyone know the forecast? What's your plan?

As a business consultant, I don't have the luxury of spending months or years with the people I am consulting. Starting subtle conversations like above and digging into their answers is my method. I have to be able to read a room within minutes to determine who the influences are, who does not want me there because my visit could mean change, what is the best way to convey the idea in my head to theirs. I want to help them know the forecast coming and plan accordingly. It's not really a skill, it's not being burdened by years of small changes, influencing an opinion of "that's just who they are". Who they are today is the only thing we have to work with helping them develop into tomorrow. How they work today is how the business is run. How can what I say help them understand what the forecast for their roles looks like. How can they take advantage of the sunny days or plan for rougher weather. What changes have taken place over the years to your business making it "what it is"? Can you see it for the potential it could be?

Take it from a Buffalonian: snow in the forecast is never as welcome as sun. But not actioning a plan to deal with that forecast will make it much less pleasant. We're here to help, no matter the forecast.

Stop by our booth at TUG Connects to get the conversation started.

Bill.Socie@NSACOM.com

DID YOU ***KNOW?***

ORDER ENTRY SUB-TOTAL LINES

BY CAROL SHINYA

Are you aware that SX.e/CSD supports Sub-Total Lines? And you can hide the individual line prices so the customer only sees an amount for a group of lines?

I get asked this question pretty frequently: *"Our customers like to "SHOP AROUND" on price, and although overall I am lower than my competitors, they'll cherry pick and only buy products where I'm the lowest price and go elsewhere for the other lines, likely the lowest priced competitor(s)."* You priced this so your overall margin is still decent, but for some items, margin is lower, others higher. By using the sub-totaling feature, you can eliminate a customer cherry picking only the items where you are the lowest.

And if you really want to get fancy, leverage the Pricing and Costing Worksheets in Order Entry followed by sub-totaling, especially if you're working on something that is highly competitive. The Pricing and Costing Worksheet functionality provides you with some easy, great tools to reprice a single line, a group of lines or all lines.

It always surprises me when I explain and demonstrate these features and the users are astounded: they're right in Order Entry (OEET) and have been around for quite some time in both GUI and WebUI/CSD.

There are a bunch of great time saving features like these that exist in both the GUI and WebUI/CSD interface, but many long-time users are not even aware they exist. There's a multitude of reasons why. Let's face it, when you're initially implementing, there is just so much to learn and absorb, it's hard to remember everything. We're simply trying to go live and survive, right? When you're upgrading, not many companies are taking the time to learn new features and review/revisit their business processes to see which should be deployed in the upgrade or shortly thereafter.

I am one of the many consultants at NSA who perform BOR's (Business Optimization Reviews.) These reviews are intended to document your current processes, both on the system and outside the system (manual, Excel, or other applications) and ensure you are really using your SX.e/CSD application to its fullest. We review the entire "Quote to Cash" and "Procure to Pay" processes. We document the current state and offer recommendations on functionality, big and small, that should be implemented. We'll help you break down the recommendations into short, medium and long-term goals, or future state, and help you strategize and prioritize how to implement these changes.

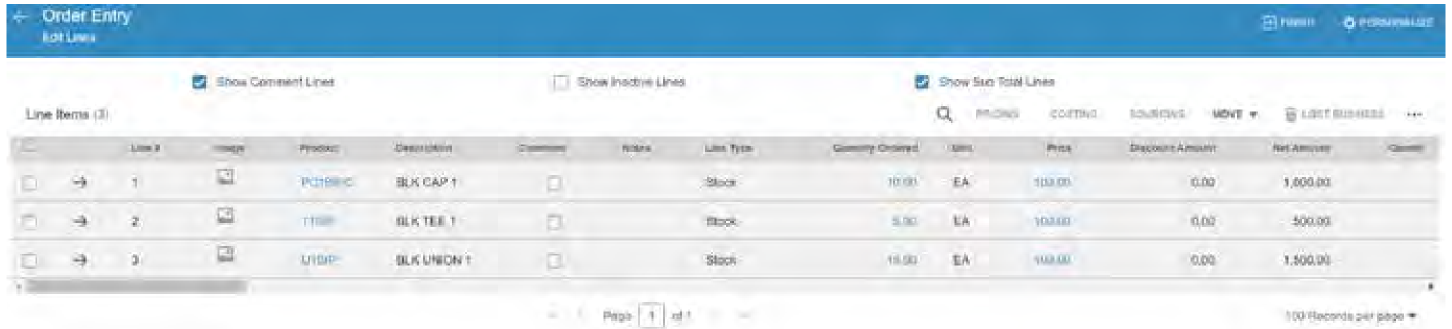
Here's a short list of some ORDER ENTRY "DID YOU KNOWS"... (that maybe you didn't!)

- Sub-Total lines
- Move/Re-Order lines on an order
- Re-price, one, many or all lines in a single screen using a variety of options: margin based, cost +, list and discount, chain discount, markup, total amount
- You can create a QU type (Quote) directly out of OEIP pricing inquiry
- Copy multiple orders into a single order

These are simply a few "gems" for sales teams. If you're interested in learning more about the BOR process, please feel free to reach out to me, Carol.Shinya@NSACOM.com

How to Add a Sub-Total Line on a Sales Order

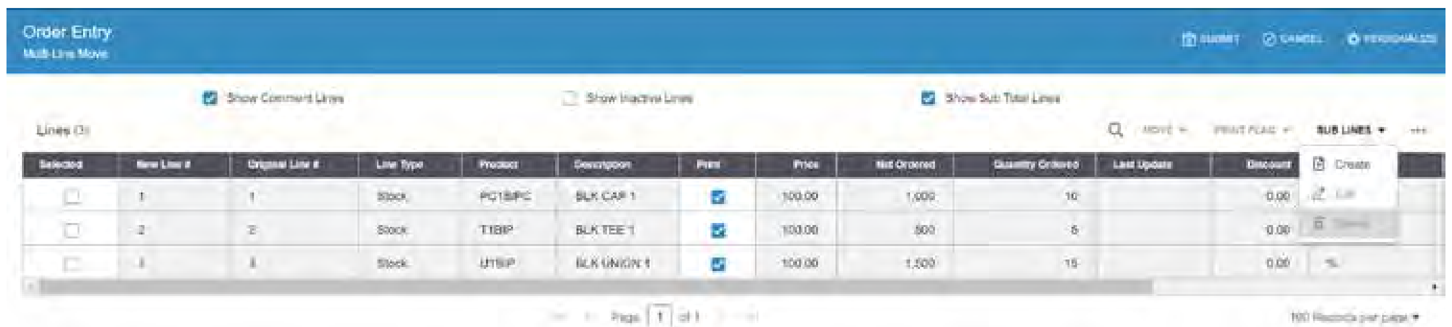
1. In Order Entry OEET, Select Edit Lines:



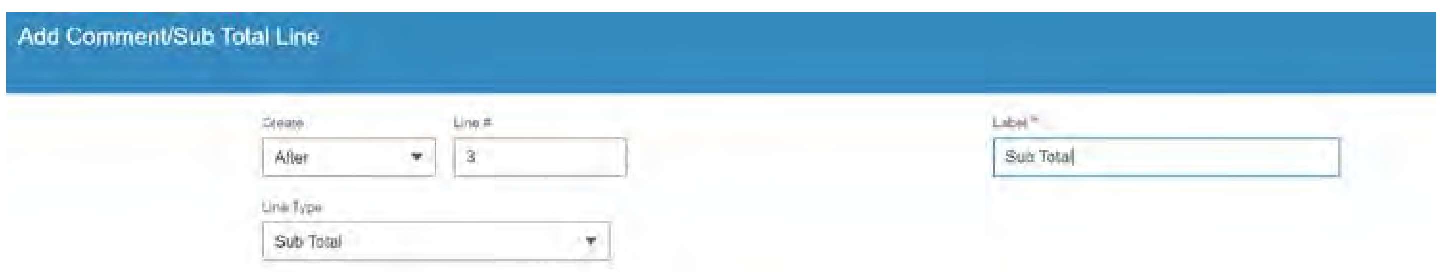
CONT'D

2. Select All Lines:
3. Select Move:
4. Select Multi-Line:

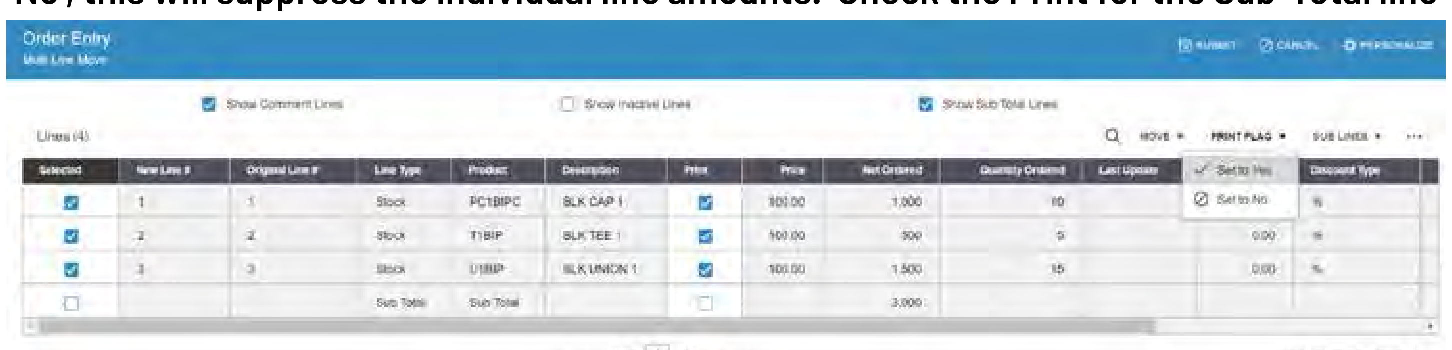
5. Select Sub-Lines, Create:



6. Select where you'd like the Sub-Total line to display Before/After and Line #
7. Select line type of Sub-Total and enter a label and submit to save



8. Back in the Multi-Line Move window, select the product lines and set the Print Flag to 'No', this will suppress the individual line amounts. Check the Print for the Sub-Total line



What the Invoice Would Look Like:

Line	Product and Description	UPC Item	Order Quantity	Backorder Quantity	Shipped Quantity	Qty UM	Unit Price	Price UM	Discount Multiplier	Amount(Net)
1	PC1BIPC BLK CAP 1	00000	10.00	0.00	10.00	EA				
2	T1BIP BLK TEE 1	00000	5.00	0.00	5.00	EA				
3	U1BIP BLK UNION 1 Sub Total **Sub Total 3,000.00**	00000	15.00	0.00	15.00	EA				
3	**Lines Total**			**Qty Shipped Total**	**30.00**				**Subtotal**	**3,000.00**
									Taxes	**180.00**
									Total	**3,180.00**
									Cash Discount 0.00	**If Paid Within Terms**

What the Acknowlegment Would Look Like:

Line	Product and Description	UPC Item	Order Quantity	Qty UM	Unit Price	Price UM	Amount(Net)
1	PC1BIPC BLK CAP 1	00000	10.00	EA			
2	T1BIP BLK TEE 1	00000	5.00	EA			
3	U1BIP BLK UNION 1 Sub-Total **Sub-Total 3,000.00**	00000	15.00	EA			
3	**Lines Total**	**Total Order Quantity**	**30.00**			**Subtotal**	**3,000.00**
						Taxes	**180.00**
						Total	**3,180.00**

ELEMENTS OF A SUCCESSFUL PROJECT

BY ANN LUCIANI

1 **DEFINITION OF THE PROJECT** Be clear about the objectives of the project. Be detailed in describing your business processes, desired future state, and how these will be implemented.

2 **PROJECT MANAGEMENT** Leverage and communicate with your Project Managers on all sides of the project: the overall PM, the Vendor PM and your internal PM. PM's keep the project on course, tracking the details, monitoring status and coordinating resources, internal and external. Most Business Owners, Department Leads and IT Managers lack the time to both run a successful project and manage day to day business. In all projects, the distance between success and failure is in this decision.

3 **THE TEAM** Assemble a knowledgeable and diverse group of members for the project. Include participants from different business units and functional areas. They should either have the ability to make decisions or have support from management to get decisions quickly. Teams contain an assortment of personalities, which need to be understood for project success. You will have the very cautious Eeyores, the enthusiastic Tiggers, the slow but wise Poohs, and all types in between. Make sure you communicate with each of them on a regular basis in the language they can hear. Comfort the Eeyores, excite the Tiggers, and provide clear details to the Poohs! Don't forget to bring in the new faces – the people who are excited and enthusiastic about learning new things. While the people who have done things the same way for the last 30 years are important, as repositories of knowledge and gatekeepers to keep the project from spinning into outer space, the Tiggers are needed to keep the energy ignited and high.

4 **LISTEN** This will help you recognize the obstacles that people are facing, their fears, and concerns. It often reveals what needs to be addressed to keep the momentum of the project moving forward.

5 **COMMUNICATE, COMMUNICATE, COMMUNICATE** Keep everyone "in the know" if parameters change, deadlines move, or just so they are aware of the current status. Invite all parties involved to collaborate. Help management and line employees alike understand any new development on the project. No issue is too small to report during the training and testing processes. Keeping the lines of communication open encourages and improves feedback.

6 **TRAINING AND PRACTICE** The #1 answer to "What would you have done differently to improve the success of your project?" Don't short cut training! Begin training early, work with the project team to create materials and procedures tailored to your organization. Have a practice plan, evaluate users on their level of comprehension, and retrain as needed.

7 **SCOPE** Don't try to do everything at once. Most upgrade projects typically have "side" projects such as implementation of replacement software, elimination of modifications, learning a new user interface. Minimize additional projects when a big change is being introduced to the business. Keep a list of Phase 2 and beyond items to revisit in the future. Focus Phase 1 on the core project and only the must-have side projects, especially for User Facing or Customer Facing projects.

8 **ADAPTABILITY** Be flexible and adaptable. All projects have obstacles that need to be addressed and overcome. Recognize that they may occur and have a risk mitigation plan. Be ready to steer the project in the direction it needs to go to address, circumvent, delay or walk around the obstacle. Build time into the project for change.

9 **EVALUATION** Evaluate the project regularly as to progress, and again at the end to make sure it's achieved its' stated purpose. Review and determine when you will introduce new procedures and implement Phase 2. Have your consultant do a review 6-9 months after an upgrade or implementation project to make sure you are leveraging your investment and optimizing features in the software.

Ann.Luciani@nsacom.com

TOP 12 ITEMS TO CONSIDER WHEN SELECTING AN E-COMMERCE SOLUTION

BY BRIAN WEAVER

1 HOSTED OR SELF-HOSTED

If you think that you need high-level customization and full control over your online store, you can go for self-hosted eCommerce platform. Otherwise, a hosted eCommerce platform would suffice your requirements.

In the case of a self-hosted eCommerce platform, you require having a team of web developers who can design and develop your website from scratch. Moreover, you need to manage web hosting on your own. One example of self-hosted eCommerce platforms is – Magento.

Whereas, a hosted eCommerce platform comes with the domain, design templates, and shopping cart management. All you need is to subscribe to their hosting package. That's it. Some examples of hosted eCommerce platforms are Insite, Easy-Ask, or Infor's Rhythm.

2 PRICE

If you are planning to launch a new store or own a small scale online business, high investment on an eCommerce platform can be a burden to your business.

With hosted platforms, you need to pay monthly subscription charges, whereas you can save on expenses like domain name registration, hosting, design & development, etc.

Self-hosted platforms may be a higher investment compared to hosted platforms, but if budget is not an issue, this can be the right choice for you.

3 FEATURES

Have you ever purchased a mobile phone with many features but not even half of them are useful to you? Same happens with an eCommerce platform.

If you have chosen an eCommerce platform with the features which are not applicable to you as per your business logic, then you are wasting your hard earned money.

There are many eCommerce platforms available from basic to advanced features. First, you need to research the features these eCommerce platforms provide.

Determine the features which you would be actually using and also the features which would help you in providing the best customer experience on your online store.Based on that research, you can choose the right eCommerce platform for your online store.

4 INTEGRATIONS

You may agree to the fact that alone, an eCommerce platform cannot run your online business. You require API integrations, extensions, plugins, etc., to get your required tasks done. Fortunately, if you are on a current version of SX.e (version 10 or higher) or CloudSuite Distribution, you have the API's needed in your ERP, but there are other applications to consider.

For example, if you are selling on Amazon along with your own Magento store, you must be able to integrate your Amazon and Magento store with an inventory management software. That would help you in managing your orders, shipments, suppliers, etc., from a single dashboard.

Does your online store integrate with maximum payment methods? If you want to increase sales and accept payments from even international customers, your store needs to be ready for accepting payments in different currencies also. The eCommerce platform you choose should be able to integrate with the required APIs or software in order to get the functionality you require for the success of your online store.

5 PRODUCT CATALOG MANAGEMENT

As a distributor, many companies manage thousands of products. Your eCommerce platform should be compatible with your existing product data and resources. If you have an unlimited list of products to display, you need an eCommerce platform which can accommodate all.

Also, managing your product catalog becomes hassle free if your eCommerce platform allows you to import your existing data from another platform or marketplace easily.

Select an eCommerce platform which makes product catalog management easy and hassle-free for you.

6 USER FRIENDLY/INTUITIVE

If you are new to eCommerce business, the user-friendliness can be a major deciding factor for you. An eCommerce platform rich in features and functionality would not be of great help to you if you don't know how to use them and likewise for your eCommerce customers using it.

The eCommerce platform you choose should be easy to use so that you can setup and update your store without any technical support. If this is not the case, the maintenance cost for your online store may increase and profits decrease. For example, changing the template of your online store as per a recent holiday season should be easy for you so that you can keep your store updated and competitive.

7 TEMPLATES

The design of your online store plays a major role in converting your visitor to your customer. People usually don't trust and buy from poorly designed websites.

Not everyone can afford to hire high profile web designers to set up an attractive and appealing online store. This is where inbuilt templates within an eCommerce platform can be useful.

Some eCommerce platforms provide attractive templates to choose from. All you need is to just select the template and customize it according to your business logic.

8 eCOMMERCE SUPPORT

Before you select an eCommerce platform, you need to check the level of customer support that is provided. You may require help at any point of time while managing your store. Tutorials can help you up to a certain level. But, a query beyond that requires a human to help.

The eCommerce platform you choose should be providing customer support 24/7 through email, phone, and chat. This would be convenient for you to manage your online store.

9 SECURITY

The biggest challenge eCommerce stores are facing these days is acquiring the trust of online shoppers. People would never like to give out their payment details to the online store which they perceive to be insecure.

You need to check that the eCommerce platform you choose supports HTTPS/SSL to ensure secure checkout for your customers. Also, it should be compliant to PCI (Payment Card Industry).

10 SCALABLE

Being an eCommerce distributor, you should be aware of the extent your business could grow in the future. Your eCommerce platform should be scalable enough to accept the changes in your business and grow along with. For example, if you increase your product categories your eCommerce platform should be scalable enough to accept that change. If this is not the case, you will have to migrate to another eCommerce platform and that can be expensive.

11 MOBILE FRIENDLY

If your online store is not mobile-friendly then you might be losing out on many customers which purchase products using their mobile devices (tablets and phones, both iOS and Android).

As per Statista, the average value of the online orders placed from a Smartphone amounted to 146.12 USD in the 4th quarter of 2019.

Select the best eCommerce platform which supports responsive web design features in order to provide excellent mobile user experience to your customers.

12 MARKETING

How would you get traffic to your online store if it is not marketed properly? In that case, you need to ensure that your eCommerce platform can...

- Support latest SEO plugins
- Integrate with social networking platforms
- Add blog to your website
- Facilitate customers to leave product reviews
- Send emails and newsletters to your customers

Also, you need to ensure that your eCommerce platform can enable features allowing you to offer discount coupons, gift cards and different promos to your customers.

The growth of your online business is possible only if your eCommerce platform meets your marketing needs.

Finally, all the features above need to translate into detailed reporting and analytics. To plan your future marketing strategy, you need to have access to analyze the present situation of your online store. How many products sold this month? Which product was maximum sold? The answers to these questions can be fetched only if you have access to accurate reports.

Ensure that your eCommerce platform provides you with the data which can help you in managing and marketing your online store in such a way that it is ready to face future business challenges.

SUMMARY

After going through all the above items which determine your choice of an eCommerce platform, ask yourself some questions...

- Which products are you selling?
- How many products do you want to display?
- How much are you willing to spend on your eCommerce platform?
- Are you planning to expand your product line in the future?
- Through which payment modes are you ready to accept payments?
- Do you require high-level customization in your online store?
- Are you migrating your store from one platform to another?

The answers to these questions will help you in determining your needs relating to an eCommerce platform and help you in choosing the best.

Come see my breakout session on Optimizing eCommerce at TUG to find out more!

Brian.Weaver@nsacom.com

CLIENT FEEDBACK...

Datto Backup Appliance Provides Peace of Mind

If you are considering buying a Datto Backup appliance for your data-center, I recommend you make the investment.

At Irr Supply Centers, Inc. we recently virtualized a part of our data-center. NSA recommended a Datto Backup Appliance which takes hourly snapshots of our VMware environment. Datto also supports agent based backups to servers outside of the VMware footprint.

MITS, a BI application, runs on a standalone Windows 2012 server. We added this server to the Datto Backup Appliance by installing the agent and adding it to the Datto Appliance using the intuitive WebUI Datto ships with.

Recently the MITS database became corrupted and we opened a support ticket with MITS. After their analysis they determined they had 2 courses of action they could pursue to fix the issue. They could do a reinstall of the software, which would have taken several hours. Or if we had a backup of the database they could copy it back to the server.

Datto makes it easy to restore right down to the file level when necessary. The solution was to mount a restore point on the Datto. The Datto creates a Windows mapped drive link which will connect to the device like a network drive.

I sent the link to the mapped restore point to MITS support. Within 20 minutes they were able to restore the database with a backup that resided on Datto. This saved their support several hours of work and we had our MITS BI server up and running very quickly. The tech at MITS said the restore gave him everything he needed.

Give yourself peace of mind and make the investment in Datto. NSA provides excellent technical support and training for the Datto product.

Kevin Saky
IT Integrator
Irr Supply Centers, Inc.

Patrick,

There aren't enough words to express our thanks for the support your organization has provided. This was a very difficult time for us as a Small Business, and we depend on relationships we establish with organizations such as NSA. One of our owners, Sally Mulder had received your name, Patrick from an individual at Infor. Every time we have reached out to you, you have been very responsive and helpful.

Rob's work and communication with Mike over the last few days to get this situation resolved were outstanding. As I understand we are down to the final short stretch now!

We have been blessed by your efforts this week, Thank you!!

Diana Bonebrake
Controller
Bursma Distributing

Patrick,

As we approach TUG 2019, I reflect on many great experiences; but most notably when I had met a member of the NSA team through TUG! I found they were all knowledgeable and responsive whenever I had any questions! Because of this meeting and their commitment to our success, we decided to finally move ahead with our Extreme Upgrade and Server migration with NSA in 2018!

I do not regret my decision. The project went smoothly, we met our target go live date, came in under budget and I'm alive to tell the tale!

Thank you to the NSA team, with special thanks to Ann Luciani, our PM who kept us on track, on target and on budget. Bill Socie, who came to my rescue to get all the forms changes done and to Jon Yourman who took care of migrating our DB server to Linux and did the double upgrade without a hitch!

I will continue to partner with NSA for all future projects on my journey to SX.e WebUI and the ultimate journey to CSD and would highly recommend others to do the same.

Best Regards!

John Kociuba
General Manager, Hydra-Steer, ERP Manager, SX.e and Related Information Systems,
The Gear Centre Group of Companies SIG Leader (TUG), Service and Assembly