



FORWARD

An NSA Publication

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A Focused Guide of Appearances

EXCITING & OFFICIAL

Details of NSA's Expanded Role with Infor

MASTERMINDS

Perennial "Best Year Ever" Isn't by Mistake

TABLE OF CONTENTS

A LETTER FROM PATRICK VANPUTTE 03

PRESENTATION – RANSOMWARE 04 Ransomware - Your Company's Greatest IT Threat

PRESENTATION – ADMIN OPTIONS 05 SX.e GUI – Administrator Options

PRESENTATION – IT RESILIENCE 06 Is Your Organization Optimized for IT Resilience?

PRESENTATION – BACKUP & RECOVERY 07 Advancements on Data Backup & Disaster Recovery

PRESENTATION – GROUP FLEXIBILITY 08 Working with Customers, Ship To's, and Groups

PRESENTATION – SETUP & SECURITY 09 SX.e GUI Operator Setup and Security

ERP PARTNER SELECTION TEST 10 - 11 Put Your Options to the Test

ROUNDTABLE DISCUSSIONS 12 Hosted by Brain Weaver and Carol Shinya

PRESENTATION – EXTREME UPGRADE 13 Getting Ready for an Extreme Upgrade

PRESENTATION – ORDER ENTRY 14 Order Entry Gone Wrong

PRESENTATION – AD HOC REPORTING 15 Ad Hoc Reporting in SX.e via Excel

MASTERMINDS 16 - 17 Perennial "Best Year Ever" Isn't by Mistake

PRESS RELEASE 18 - 19 Exciting & Official - Details of NSA's Expanded Role with Infor

FOLLOW NSA @



Thursday, February 23rd

9:30am – 10:15am - *Brian Weaver*
🔊 **Ransomware** – your company's greatest IT threat to business in 2017, prepare yourself!

1:15pm – 2:15pm - *Kathy Lundquist*
🔊 **SX.e GUI** – Administrator Options (AO)

2:45pm – 3:45pm - *Brian Weaver*
🔊 **Is Your Organization Optimized for IT Resilience?**

Amazon ECHO Giveaway at Booth #104!
Drawings Thu 2/23 at 6:00pm & Fri 2/24 at 3:30pm

Friday, February 24th

9:30am – 10:15am - *Brian Weaver*
🔊 **Advancements in Data Backup & Disaster Recovery**

4:00pm – 5:00pm - *Linda Gavin*
🔊 **Working with Customers, Ship To's, and Groups**

4:00pm – 5:00pm - *Kathy Lundquist*
🔊 **SX.e GUI Operator Setup and Security**

Saturday, February 25th

8:00am – 9:00am
Buffet Roundtable @ Table #6
Hosted by Carol Shinya
🔊 **Canadian Sx User Requirements**

9:00am – 10:00am
Buffet Roundtable @ Table #5
Hosted by Carol Shinya
🔊 **Mergers and Acquisitions**

9:00am – 10:00am
Buffet Roundtable @ Table #2
Hosted by Brian Weaver
🔊 **Prioritizing Cloud & Managed Service Needs**

10:00am – 12:00pm
Kathy Lundquist /Linda Gavin
🔊 **Deep Dive** – Getting Ready for an Extreme Upgrade

1:00pm – 3:00pm
Linda Gavin
🔊 **Deep Dive** – Order Entry Gone Wrong

3:15pm – 5:00pm
Kathy Lundquist
🔊 **Deep Dive** – Ad Hoc Reporting in SX.e via Excel

A TRADITION OF FORWARD THINKING

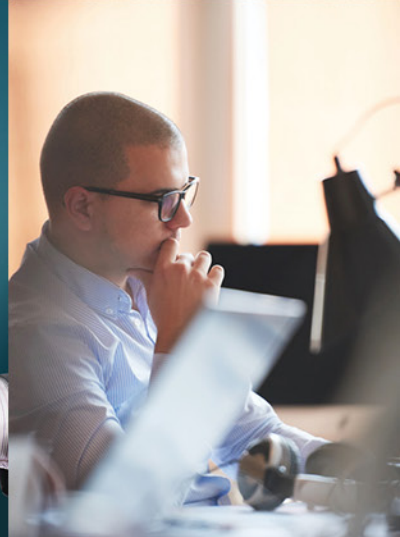
Welcome to TUG Connects 2017! I'm sure you are excited to gather all kinds of new information throughout the event that can help you and your business grow and become more efficient. This year, NSA is excited to have several of our senior level specialists presenting at 9 breakout sessions and we would like to cordially invite you to join us.

As with many industry conferences like TUG, the time here will be over before you know it, so be sure to visit our booth #104 to speak directly with our specialists on how we can help your business and answer the questions that are on the minds of today's top distributors. Not to rub it in, but we also have a little something special for those that stop by. Hope to see you there!

Sincerely,

Patrick VanPutte

Patrick VanPutte
President & COO
NSA Professional Services



RANSOMWARE - YOUR COMPANY'S GREATEST IT THREAT



Hosted by
BRIAN WEAVER

RANSOMWARE encrypts files so you can't use them, encrypts all network shares, and demands money (in bitcoin) in order to gain access to your files.

KEY TAKEAWAYS

RANSOMWARE INCIDENTS ARE SKYROCKETING

- In 2016, there were over 4 million variants and over \$1 billion paid to "unlock" data.
- Payment in bitcoin has become common as it is untraceable
- More sophisticated phishing techniques are being used
- It isn't a matter of "IF" but "WHEN" your company will be hit

US Dept. of Homeland Security's #1 Recommendation is to employ a data backup and recovery plan for all critical information.

RANSOMWARE SURVEY RESULTS

- ✓ 91% of IT support providers surveyed have dealt with RANSOMWARE in the past 2 years
- ✓ 43% have dealt with 6 or more instances of RANSOMWARE in the past 12 months
- ✓ 94% of RANSOMWARE victims had anti-virus/anti-malware in place
- ✓ Only 15% of RANSOMWARE victims had basic cyber security training for their employees before the attack

WAYS TO SAFEGUARD YOUR COMPANY

- Training at least once/year, company-wide & all new employees
- Make certain firewalls & endpoint security is up to date
- Keep up on the latest phishing methods & communicate them to all associates
- Look for unusual IT activity, executables running

Like many things in today's world, early detection is key since RANSOMWARE leaves a footprint.

WHEN YOU ARE INFECTED WITH RANSOMWARE

- Have a Cyber Incident Response Plan in place
- Don't pay the ransom!
- Contact your IT support provider
- Restore from a backup

CONTINUITY IS:

Hybrid cloud-based backup paired with Image-based backup to deliver superior RTO (recovery time objective: how much downtime) and RPO (recovery point objective: how much data are you willing to lose). Continuity also Eliminates downtime (Virtualization).

Testing your backups provides proof that the backup happened, which leads to peace of mind for you and your staff and increased continuity value.

SX.e GUI - ADMINISTRATOR OPTIONS



Hosted by
KATHY LUNDQUIST

ADMINISTRATOR OPTIONS - also referred to as system flags, are a key element in configuring your SX.e system.

If your company is preparing for a go live, upgrading multiple versions, or reviewing existing settings, it's critical to understand how the AOs impact your business.

KEY TAKEAWAYS

- How to approach initial setups
- It takes a village – the team approach
- Impact of settings
- Documenting setups
- Access and security
- Tracking changes
- Overview of each AO screen
- Identifying new administrative options (upgrades)
- Not all options are equal – which should be changed with caution after go live
- White paper with field by field information

IS YOUR ORGANIZATION OPTIMIZED FOR IT RESILIENCE?



Hosted by
Brian Weaver

With all your critical functions in-house, this needs to be a priority.

We all know how dependent distributors are on their ERP systems, as it is critical to every functional area of the company. Nothing is more important than ensuring your systems availability.

KEY TAKEAWAYS

- **SYSTEM BACKUP & RECOVERY:** with the explosion of ransomware and other viruses, it is critical to go back in time to quickly recover from an attack & get your company back in business within minutes.
- **SYSTEM MONITORING & REMEDIATION:** detect trouble & repair problems as soon as possible to head off catastrophic failures and reduce your support costs.
- **INFRASTRUCTURE HOSTING:** what internal conditions might make augmenting your compute power with a hosting option make sense & how this can make your system more secure and efficient.

ADVANCEMENTS IN DATA BACKUP & DISASTER RECOVERY



Hosted by
BRIAN WEAVER

Advancements in data backup & disaster recovery (BC/DR) are light years from the old tape backups of the past, saving you time and money.

KEY TAKEAWAYS

- **IMAGED-BASED BACKUPS** provide a fast restore (within minutes) of the entire systems & settings on the device – including operating system, applications, system settings, security, logins & passwords, etc. This differs from traditional file based, where that requires a manual re-install, set-up, permissions, security, etc. and then bringing back files one at a time... a process that could take days.

Co-location services require end users to pay a monthly fee for the ability to “light up” a co-location infrastructure regardless of if it is used or not. With the right BC/DR, end users can run their entire infrastructure out of their BC/DR data center for up to 30 days – at no additional cost. End-users are therefore able to forego paying for co-location services and those funds can help with cost justification for a modern BC/DR solution.

- **RECOVERY POINT OBJECTIVE [RPO]:** the amount of time a company is willing to possibly re-enter some of their data (determines frequency of backups – could be every 5 minutes, every 30 minutes, every hour, etc.)
- **RECOVERY TIME OBJECTIVE [RTO]:** this is the amount of time the company will take to restore their systems from point of failure (could be minutes, or up to a couple hours).

A tight **RPO & RTO** gives a customer the ability to be back in business very quickly – within minutes instead of days for old tape backups, saving companies from the high costs associated with downtime, such as not able to take orders, lost opportunities, idle workers, etc.

Ransomware infections leave a “footprint” as it goes about infecting files. It shows unusual activity on normally “static” files such as customer/vendor/item master files, often adding an extension to all these files to then encrypt them in the near future. **By detecting this activity, you can take pre-emptive action** to eradicate the ransomware by restoring systems to a point prior to infection & before the encryption kicks in... thereby preventing any disruption.

Utilize the **DOWNTIME CALCULATOR** to see what it costs for each minute of downtime for your company.

WORKING WITH CUSTOMERS, SHIP TO'S & GROUPS



Hosted by
LINDA GAVIN

The AR Master Group (ARSG) feature allows you to group customers having a common thread and then invoke functions collectively upon the group. The group feature offers you flexibility in performing several AR tasks.

KEY TAKEAWAYS

TASKS THAT CAN BE PERFORMED

- View consolidated and individual credit limits
- Analyze consolidated and individual customer accounts receivable data
- Place groups of customers on hold
- Apply cash to a group of customer invoices, as well as individual customer invoices
- View freight and tax information relative to invoices to identify problems during the cash application process
- Manipulate invoices based upon the group

GROUP SETUPS

- | | |
|----------------------|----------------------|
| ■ Service Charges | ■ Credit Limits |
| ■ Unearned Discounts | ■ Hold Periods |
| ■ Currency | ■ Sales Order Status |
| ■ Credit Manager | |

LIMITATIONS OF THE GROUP FUNCTIONALITY:

- Customer can be a member of only one group
- Customers in a group must share the same currency
- Customers with a floor plan cannot be added to a group
- Notes functionality is not available for groups
- Bank has to be manually entered in ARECE – does not default

SX.e GUI - OPERATOR SETUP & SECURITY



Hosted by
KATHY LUNDQUIST

OPERATOR SETUP AND SECURITY - is fundamental to working within SX.e. It controls who has access to business critical information and who does not. Setting up security can be a daunting task. Lax security can put your data at risk.

KEY TAKEAWAYS

- Access to security setups
- Overview of security screens
- Security flags
- Menus and sub-menus
- Authorization points
- Security reporting
- Upgrades – new flags and menu options
- Sys Operator
- R&D Operator
- SOD – Segregation of Duties
- White paper with field by field information



ERP Partner Selection Test



Put Your Options to the Test...

- ☒ Has the company had a **LONG RECORD** of successful ERP implementation and migration and been in existence for over 30 years?
- ☒ Will you be working with a solid **TEAM** that has largely worked together for more than 15 years?
- ☒ Is the company focused on keeping everyone from the CEO and CFO to the general labor force **INFORMED** throughout the process?
- ☒ Does the company's team generally consist of people that have **DIRECT EXPERIENCE** in the distribution industry, arming them with the ability to speak your business's "language"?
- ☒ Are the company's methodologies based on actual experience and guidance that have **PROVEN** to be successful?
- ☒ Is the company focused on **COLLABORATING** with your team instead of just talking to them?
- ☒ Does the company have the dedicated resources and **BANDWIDTH** to complete your migration within your target time frame?
- ☒ Is the company able to **CUSTOMIZE** their solutions to best fit your business?
- ☒ Will the business **RELATIONSHIP** continue forward after the implementation as a support partner?
- ☒ Is the company a good **CULTURAL FIT** with your organization?
- ☒ Does the implementation team take a **HANDS-ON** approach by working directly side by side with your group?
- ☒ Does the company provide **EXTENSIVE TRAINING** for your team in order to get the most out of your ERP investment?
- ☒ Will you receive **CONSISTENCY** with who you speak to throughout the process with direct contacts?
- ☒ Does the company have **EXPERTISE** in every facet of strategic ERP implementation?
- ☒ Is the company able to see beyond the technical side of your ERP as **TRULY KNOWLEDGEABLE** business consultants?
- ☒ Does the company offer a **WIDE RANGE** of ERP software selections, (both cloud-based and on-site) implementation, organizational change management, business process re-engineering, IT strategy, and project recovery services?
- ☒ Are the skill sets **FULLY INTEGRATED** with the ability to tap into technical expertise, conversion expertise, programming expertise and business consulting expertise – all in one combined call, under ONE department umbrella?
- ☒ Does the company offer **CLOUD SERVICES** like backup and disaster recovery, hosting, and proactive IT support?
- ☒ Does the company have the depth of **RESOURCES** to provide you with what you need without the cumbersomeness of being too large to keep track of the details?
- ☒ Is the company consistently admired and respected as the **INDUSTRY LEADERS** by their corporate peers in the Infor/SX.e world?

Choosing the right ERP partner can be one of the most important decisions you make for your business with the effects spanning years. To help with the selection process, the team at NSA has developed these questions to put your options to the test, ensuring that the partner you choose is a good fit for your implementation or conversion and is dedicated to the success of your business.



We know you'll find NSA Professional Services can offer everything you need in a successful ERP implementation and service partner.

Once you've compared your options and are ready to receive the peace of mind you are striving for and deserve, please contact us.

P: 516.240.6020

www.NSACOM.com

solutions@nsacom.com



THE HUMAN SIDE OF ERP

CANADIAN SX USER REQUIREMENTS

Hosted by

CAROL SHINYA

What are some of your challenges and what features or functionality exist in SX.e?
Environmental Fees (ECO fees), Product Restrictions, Multi-Language.
What is available and what are some of the "gotcha's"?

PRIORITIZING CLOUD & MANAGED SERVICE NEEDS

Hosted by

BRIAN WEAVER

What services do you presently use and how do you determine
which services make the most sense for your company?

MERGERS & ACQUISITIONS

Hosted by

CAROL SHINYA

What are the gotcha's, things to watch out for? What has been your experience
and if you had to do it over again, what would you change?

MAXIMIZING THE ROUNDTABLE

An effective roundtable is the result of active participation from all those who attend and from the perspectives and experiences that are shared. Our hope for all attendees is that everyone at the table can walk away with information that is immediately relevant for their company. We expect different perspectives from attendees will spotlight positive approaches and perhaps even some mistakes that others can learn from, as well as providing valuable insights through which others can see immediate benefits for their respective companies.

DEEP DIVE: GETTING READY FOR AN EXTREME UPGRADE



Hosted by

LINDA GAVIN, **KATHY LUNDQUIST**
and **SCOTT SMITHSON**

An extreme upgrade requires planning, coordination, and communication. Being properly prepared will be the key to a successful implementation and/or upgrade.

KEY TAKEAWAYS

CONSIDERATIONS FOR YOUR IMPLEMENTATION OR UPGRADE

- **PLANNING** – a project plan is a must for keeping your implementation or upgrade on track.
- **CHANGE MANAGEMENT** – communication is a critical element of a successful implementation.
- **DATA CONVERSIONS** – where is the data coming from; what clean-up is needed.
- **WHAT'S NEW** – know the new features and functionality available with an upgrade and include it in your training plan.
- **FORMS** – review all forms to determine how to incorporate new fields that are available
- **REPORTS** – review the upgrade for report changes and enhancements, and migrating from Report Manager to Report Scheduler.
- **MODIFICATIONS** – a full review of modifications is essential. Have your processes changed? Is there new functionality that can eliminate the need for any of those mods?
- **ROLL OUT STRATEGY** – Big Bang or phased roll out.
- **TRAINING** – determine methodology and resources. Create a detailed training plan including schedules and blackout dates.
- **SUPPORT** – setting up a help desk, what resources will be utilized?
- **DOCUMENTATION** – requirements for documentation – public company or privately held.

DEEP DIVE: ORDER ENTRY **GONE WRONG**



Hosted by
LINDA GAVIN

What preventive action can be taken to avoid invoice processing exceptions? How are exceptions resolved once they do occur? How is Order Entry used to handle returns and corrections?

KEY TAKEAWAYS

EXCEPTIONS PREVENTION

- Order Audit - OERA
 - ✓ Balances sales orders and customer records
- Sales Pre-invoice Exception Reporting - OERX
 - ✓ Same logic as OEEPI
 - ✓ Prior to invoice processing – can be run multiple times during the day
- Order Exception Report – OERE
 - ✓ Used to alert you to exceptions that have occurred
 - ✓ Run on a regular basis to remedy exceptions prior to invoice processing

INVOICE PROCESSING

- ✓ OERA during OEEPI balances line and header information
- ✓ Updates are made to Accounts Receivable, General Ledger and Inventory
- ✓ Exceptions encountered during invoice processing are usually show stoppers.
- ✓ Exceptions that are not show stoppers – DR > CR; CR > DR; GL code missing; order not in balance

ORDER EXCEPTION INQUIRY

- ✓ OERX exceptions
- ✓ OEEPI exceptions

CREDITS (CREDIT AND REBILL); RECEIVED ON ACCOUNT

- Return Merchandise
 - ✓ Inventory is impacted
 - ✓ Tie or not tie to original invoice
- Tax Corrections
 - ✓ No impact to inventory
 - ✓ Taxable versus nontaxable
 - ✓ Wrong tax rate / jurisdiction
- Price Corrections
 - ✓ No impact to inventory
- Freight Corrections
 - ✓ Add-ons – can be positive or negative
- Received on account creates an unapplied cash transaction

DEEP DIVE: AD HOC REPORTING IN **SX.e** VIA **EXCEL**



Hosted by
KATHY LUNDQUIST

While SX.e has a large variety of standard reports, there are many times your company needs specific data that is not easily obtained from these reports. Accounting departments in particular need quick access to specific data for analysis. Gathering information for audit requests can be burdensome if the data is not in a user friendly format. Leveraging standard tools in Excel to create quick reports will be a game changer!

KEY TAKEAWAYS

- Benefits to Excel reporting
- Drawbacks to Excel reporting
- Security
- Step by step how to
- Data dictionary
- Joining tables and fields
- Working with arrays
- Prompting for values – date range, warehouse, sales rep, etc.
- Sample quick reports
- White paper documentation

ACCOMPLISHING **ANOTHER** “**BEST YEAR EVER**” DOESN'T HAPPEN BY MISTAKE

2016 was a monumental year for NSA. The companies we've been able to work with have seen amazing results. Our existing relationships continue to develop and strengthen as they, too, realize success. But accomplishing another “best year ever” doesn't happen by mistake, nor does it happen on its own.

Knowing this, NSA gathered its senior-level specialists off-site for a multi-day masterminding event to discuss not only the lessons we've learned throughout the year, but also to discuss how we will once again accomplish another chart-topping year in 2017. The results from this meeting were extraordinarily impressive and have already launched NSA to new heights on many fronts.

The team that we have assembled over the last 33 years is nothing short of phenomenal with many coming directly from distribution backgrounds and nearly all of them celebrating and sustaining lengthy tenures within NSA. Not to brag, but there IS a reason NSA is looked at as an authority in this industry and eagerly called upon by today's top distributors.

We are here to help your business achieve the best success it can, in any way possible. Always have. Always will.





Distinguished NSA Ladies

Linda Gavin, Kathy Lundquist, Ann Luciani & Kerri Kelly



Honored NSA Gentlemen

Richard Smilowitz, Jon Yourman, Colin Rhyno, Patrick VanPutte, Neil Smilowitz, Jason Kan, Brian Weaver & Bill Socie



NSA & Infor Raise a Glass

Patrick VanPutte & Neil Smilowitz - NSA, Dave Mullins - Infor



President, Patrick VanPutte Addresses NSA Specialists



NSA Computer Exchange Corp **EXPANDS** Its Role

in the Infor Partner Network (IPN) as
an Alliance Partner **TO ASSIST** in the
Implementation, Support, and Sales
Support of **INFOR DISTRIBUTION SX.e**

Channel
Partner



Alliance
Partner

HICKSVILLE, NEW YORK – NSA Computer Exchange Corp (NSA) is excited to announce its official participation in the Infor Partner Network (IPN) Alliance Partner Program to help support implementation of Infor's Distribution SX.e Enterprise Resource Planning (ERP) offerings. Infor, a leading provider of business applications specialized by industry and built for the cloud, has developed the IPN Alliance Partner Program in part to give Infor the opportunity to work with those vendors it believes can bring thought-leadership, industry knowledge, and subject matter expertise to its customer implementations, and NSA is proud to be recognized in this capacity.

NSA has focused on the special requirements of wholesale distributors, providing businesses with technology solutions and best practices since 1984. The NSA professional services team is passionate about helping customers realize their goals. They have expansive knowledge about the wholesale distribution industry, with the depth of experience and the technical capability to handle projects of varying complexity. NSA works to provide high quality, innovative, and value-added results for every area of operations. Installing a new business solution can be a daunting task. The transition period from the old to the new represents an ideal opportunity to review and update the business' processes, policies, and procedures, which can help increase productivity and profitability within an organization.

"This latest engagement with Infor is an exciting evolution of our relationship," stated founder and CEO Neil Smilowitz, adding that "we are proud to have been selected and approved as an Infor Alliance Partner and are here to help Infor Distribution Sx.e customers both new and existing."

NSA has been an Infor Channel Partner for over 30 years, having participated in every level of the SX.e platform, starting with Trend 1.0. "Because of our continued participation in the platform," Mr. Smilowitz states, "NSA can offer insight that may not be readily available through other sources." Each of NSA's associates has over 25 years' experience in the distribution marketplace and their engagements go far beyond the software and into many of the idiosyncratic complexities of the business entities they support.

Alliance Partners continue to play an integral role in Infor. "Bringing NSA's thirty-three years of experience in ERP strategies to our customers was a painless decision," said Samuel Kaufman, Alliance Director, Infor. "We look forward to continuing to grow our relationship with NSA in order to help provide our customers with superior support for years to come."



ABOUT INFOR

Infor builds business software for specific industries in the cloud. With 15,000 employees and over 90,000 customers in more than 170 countries, Infor software is designed for progress. To learn more about Infor, please visit www.infor.com

ABOUT NSA

Founded in 1984, NSA has been helping businesses and entrepreneurs identify and implement technology to improve business performance and reduce costs. NSA's expertise and core specializations encompass Distribution, Supply Chain Management (SCM), and Enterprise Resource Planning (ERP) while spanning across over 20 micro verticals, including Building Material, Plumbing and HVAC, Electrical, Industrial Distribution, Appliance Parts, Janitorial and Paper, Rigging and Hardware Products, and Copiers and Disposable Office Products, and many more.

**Interested parties can contact NSA Computer Exchange Corp
at (516) 240-6020 or solutions@nsacom.com**

YOU NEED NSA

Channel
Partner



Alliance
Partner

Preparing to go public?

Considering your options
for upgrading?

Forecasting growth
through acquisition?

Having issues with
commodity pricing?

Changing your business model?

Planning on changing
ERP systems?

Is your company protected
from ransomware?

Solving the many questions on
the minds of top distributors



THE HUMAN SIDE OF ERP

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