Going online means more than just putting up a website. It means providing secure payment options, managing inventory, and more…while tying everything seamlessly into your financials. Use this readiness checklist to help you and your Acumatica partner identify how your ERP should interact with your eCommerce site to give you more control and profitability.

Current eCommerce Status

1. Are you currently selling online? *(If No, skip to the next section)*
2. How many SKUs do you have?
3. Do you have a structured catalog of products? Is the structure familiar to your customers?
4. Do you sell to consumers (B2C) or to businesses (B2B)? If both, which customer base is larger?
5. How many transactions do you process through your website daily?
6. Are you selling on any marketplaces? (e.g., Amazon, Walmart.com) If so, which ones?
7. Do you have an automated solution for reconciling marketplace payments?
8. How many warehouses do you ship eCommerce products from?
9. What shipping services do you use?
10. Do you use a Shipping Service application (e.g., ShipStation, StarShip)?
11. Do you ever arrange specialty or freight shipping for business accounts?
12. Do you offer customer pickup?
13. Which credit card gateway and processor do you use (e.g., Authorize.net, Stripe, BrainTree)?
14. How will you handle returns for web-based orders? How many returns do you average each month? Do you review returns before issuing refunds/exchanges?
15. How will you handle inventory? What inventory do you want customers to see (e.g., quantity in/out of stock, backorders)?

Product Types

1. Which product types represent your products?
   - [ ] *Simple Products:* One product, one SKU. No options or variations
   - [ ] *Products with Variants:* One product offered in a variety of formats; separate SKUs
   - [ ] *Configurable Products ("Custom Orders"):* One product offered in a variety of formats; no separate SKUs
   - [ ] *Product Bundles:* A collection or group of separate SKUs sold as one product; no option to customize
   - [ ] *Configurable Bundles:* Like Product Bundles, except the buyer has options within the kit
   - [ ] *Add-On Products:* Products usually sold with another product but not required (e.g., installation kit)
   - [ ] *Virtual Products:* Non-stock products downloaded or virtually accessed (e.g., eBooks)
2. Are customers familiar with your product SKUs (common in Electrical and Plumbing) or do they refer to popular names?
3. Are product options ever "rules based" (e.g., certain lenses not offered with a particular camera body)?

Selling to Consumers (B2C)

1. Do you allow guest purchases (checking out without creating an account)?
2. Do you offer coupon codes to your customers?
3. Do you offer any subscription-based products?
4. Does your team ever place orders on behalf of your customers over the phone?

Selling to Businesses (B2B)

1. Do you offer customer specific pricing?
2. Do your business accounts typically have multiple buyers?
3. Are there cases when products are available to one customer but not to another?
4. Do you offer volume-based discounts (e.g., "Buy 10 or more, receive 10% off")?
5. Do you allow "pre-orders" on products that are not yet available?

Content and Media

1. Do any of your products require significant explanation to help the customer select a product?
2. Do you sell many comparable products?
3. Are additional resources helpful in selling, installing, or using your products?
4. Does your team use content marketing, videos, or blog articles to attract customers?
5. Do you use social media? If so, which platforms?
6. Do you use email marketing? Which email marketing platform are you using?