
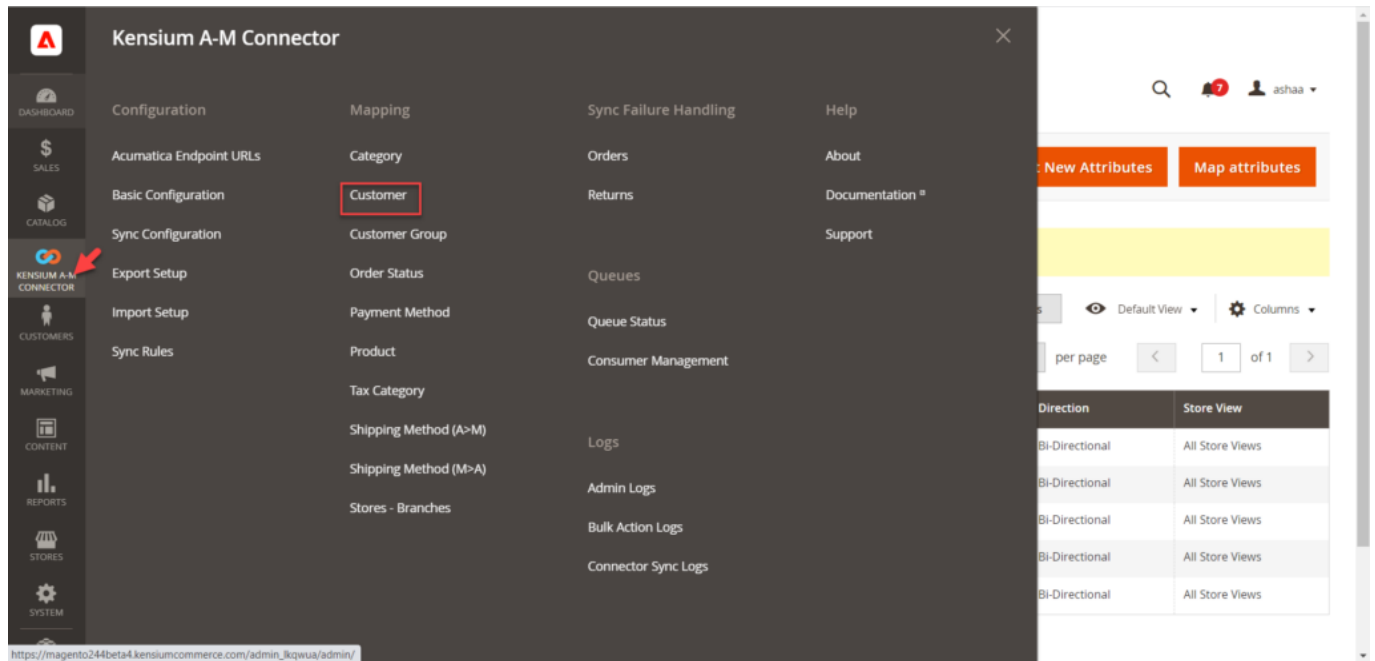


Customer Mapping

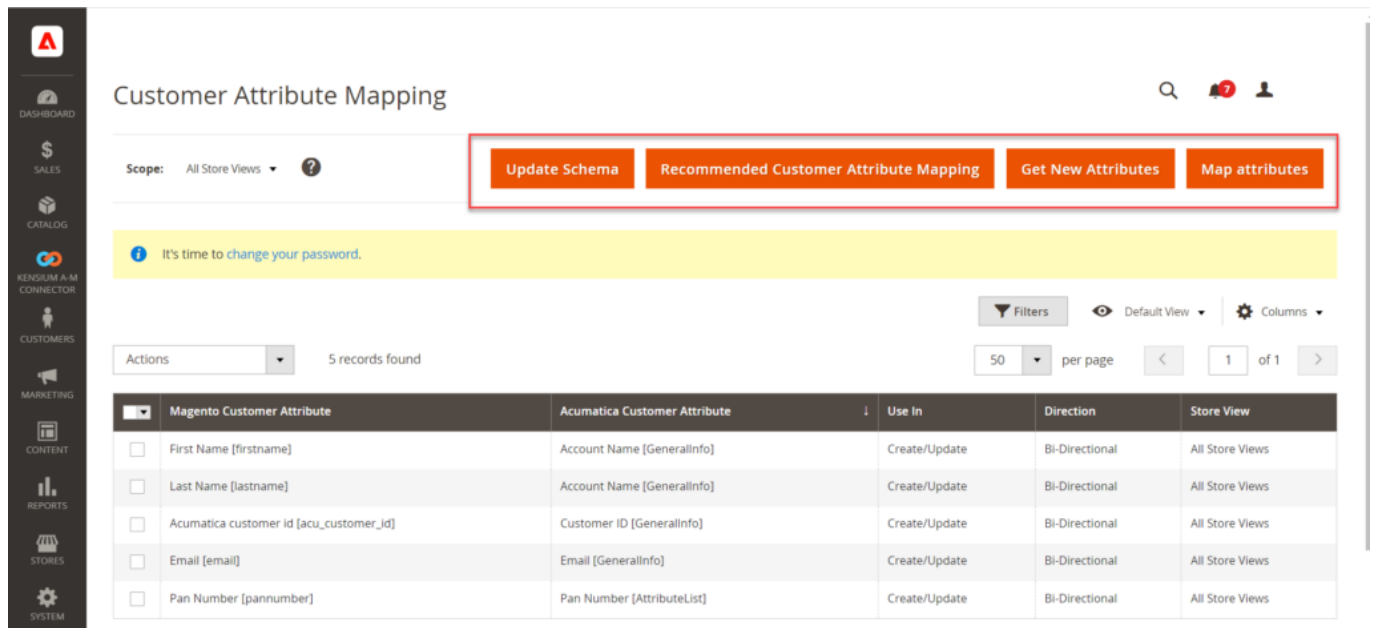
 Customer Mapping is followed by Category mapping in the Mapping section upon clicking on the **[Kensium A-M]** connector. Upon clicking the **[Customer]**, you will be redirected to the following screen.



The screenshot displays the Kensium A-M Connector interface. The left sidebar shows the navigation menu with the 'KENSIMUM A-M CONNECTOR' option highlighted. The main content area is divided into four tabs: Configuration, Mapping, Sync Failure Handling, and Help. The 'Mapping' tab is active, and the 'Customer' option is highlighted. The right sidebar shows the 'New Attributes' and 'Map attributes' buttons. Below these, there is a table with columns 'Direction' and 'Store View'.

| Direction | Store View |
|----------------|-----------------|
| Bi-Directional | All Store Views |
| Bi-Directional | All Store Views |
| Bi-Directional | All Store Views |
| Bi-Directional | All Store Views |
| Bi-Directional | All Store Views |

Customer Mapping in the Mapping section



Customer Attribute Mapping

Scope: All Store Views

Update Schema Recommended Customer Attribute Mapping Get New Attributes Map attributes

It's time to change your password.

Filters Default View Columns

Actions 5 records found 50 per page 1 of 1

| | Magento Customer Attribute | Acumatica Customer Attribute | Use In | Direction | Store View |
|--------------------------|---|------------------------------|---------------|----------------|-----------------|
| <input type="checkbox"/> | First Name [firstname] | Account Name [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Last Name [lastname] | Account Name [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Acumatica customer id [acu_customer_id] | Customer ID [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Email [email] | Email [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Pan Number [pannumber] | Pan Number [AttributeList] | Create/Update | Bi-Directional | All Store Views |

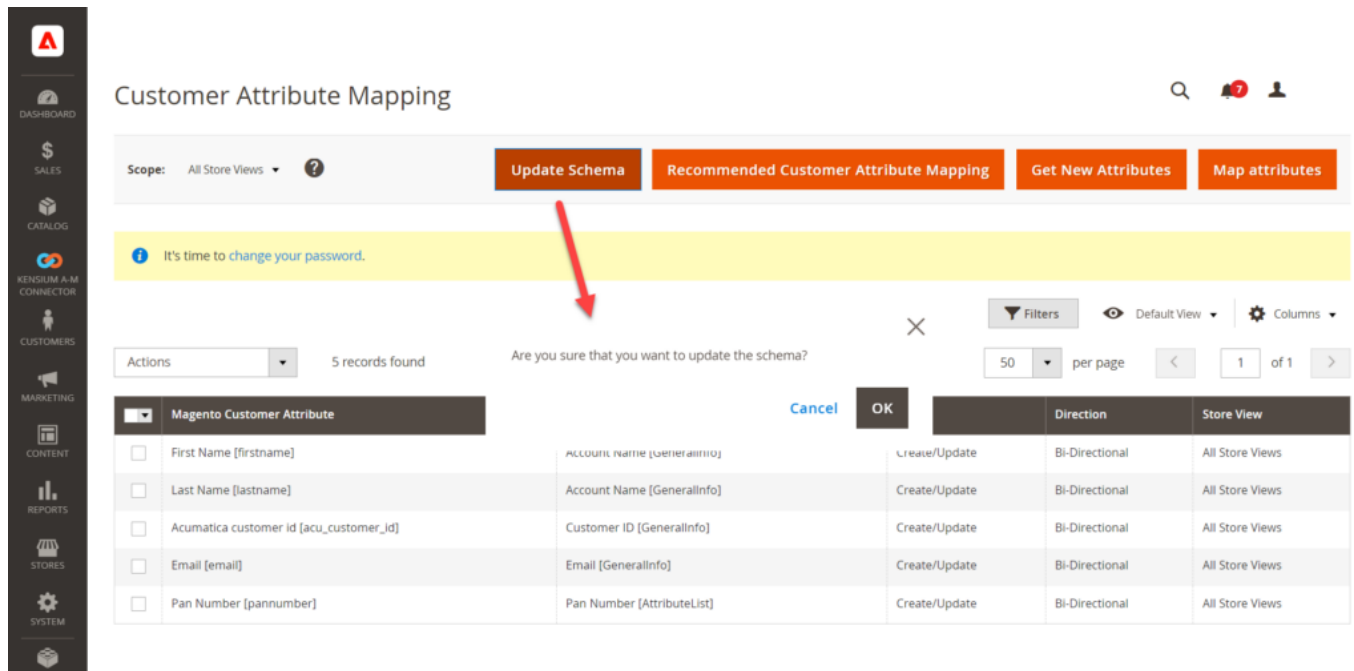
Options available in the Customer Attribute Mapping

This includes the following options in the Customer Attribute Mapping screen.

- **Update Schema**
- **Recommended Customer Attribute Mapping**
- **Get New Attributes**
- **Map Attributes**

Update Schema:

The customer-selected fields in Acumatica will be synchronized within Magento once you click on [Update Schema]. Upon clicking on this a pop-up will appear and to update you need to click on [OK].



The screenshot shows the 'Customer Attribute Mapping' page. At the top, there's a navigation bar with buttons: 'Update Schema', 'Recommended Customer Attribute Mapping', 'Get New Attributes', and 'Map attributes'. A red arrow points to the 'Update Schema' button. Below the navigation bar, a yellow banner displays a message: 'It's time to change your password.' Below this, a confirmation dialog box asks 'Are you sure that you want to update the schema?' with 'Cancel' and 'OK' buttons. The 'OK' button is highlighted. Below the dialog, a table titled 'Magento Customer Attribute' lists attributes and their mappings.

| | Attribute | Source | Direction | Store View | |
|--------------------------|---|----------------------------|---------------|----------------|-----------------|
| <input type="checkbox"/> | First Name [firstname] | ACCOUNT NAME [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Last Name [lastname] | Account Name [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Acumatica customer id [acu_customer_id] | Customer ID [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Email [email] | Email [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Pan Number [pannumber] | Pan Number [AttributeList] | Create/Update | Bi-Directional | All Store Views |

Confirmation message upon clicking [Update Schema]

- **Recommended Customer Attribute Mapping:**

In the first place, the customer attribute mapping browse will be blank on your screen. To bring the default customer attribute you need to click on the [Recommended Customer Attribute Mapping]. A confirmation message will appear on the screen. Click on **[OK]** and the default attributes will appear on the screen.



DASHBOARD

SALES

CATALOG

KENSIUM A-M CONNECTOR

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Customer Attribute Mapping

Scope: All Store Views ?

Update Schema

Recommended Customer Attribute Mapping

Get New Attributes

Map attributes

It's time to change your password.

Are you sure that you want to change the current mapping to recommended mapping? If so, all existing data will be deleted.

CancelOK

Filters

Default View

Columns

Actions

0 records

50 per page

1 of 1

| | Magento Customer Attribute | Acumatica Customer Attribute | Use In | Direction | Store View |
|-------------------------------|----------------------------|------------------------------|--------|-----------|------------|
| We couldn't find any records. | | | | | |

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Confirmation pop-up for recommended customer attribute mapping

DASHBOARD

SALES

CATALOG

KENSIUM A-M CONNECTOR

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Customer Attribute Mapping

Scope: All Store Views ?

Update Schema

Recommended Customer Attribute Mapping

Get New Attributes

Map attributes

It's time to change your password.

Recommended customer attributes mapped successfully!

Filters

Default View

Columns

Actions

4 records found

50 per page

1 of 1

| | Magento Customer Attribute | Acumatica Customer Attribute | Use In | Direction | Store View |
|--------------------------|---|------------------------------|---------------|----------------|-----------------|
| <input type="checkbox"/> | Acumatica customer id [acu_customer_id] | Customer ID [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | First Name [firstname] | | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Last Name [lastname] | | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Email [email] | Email [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |

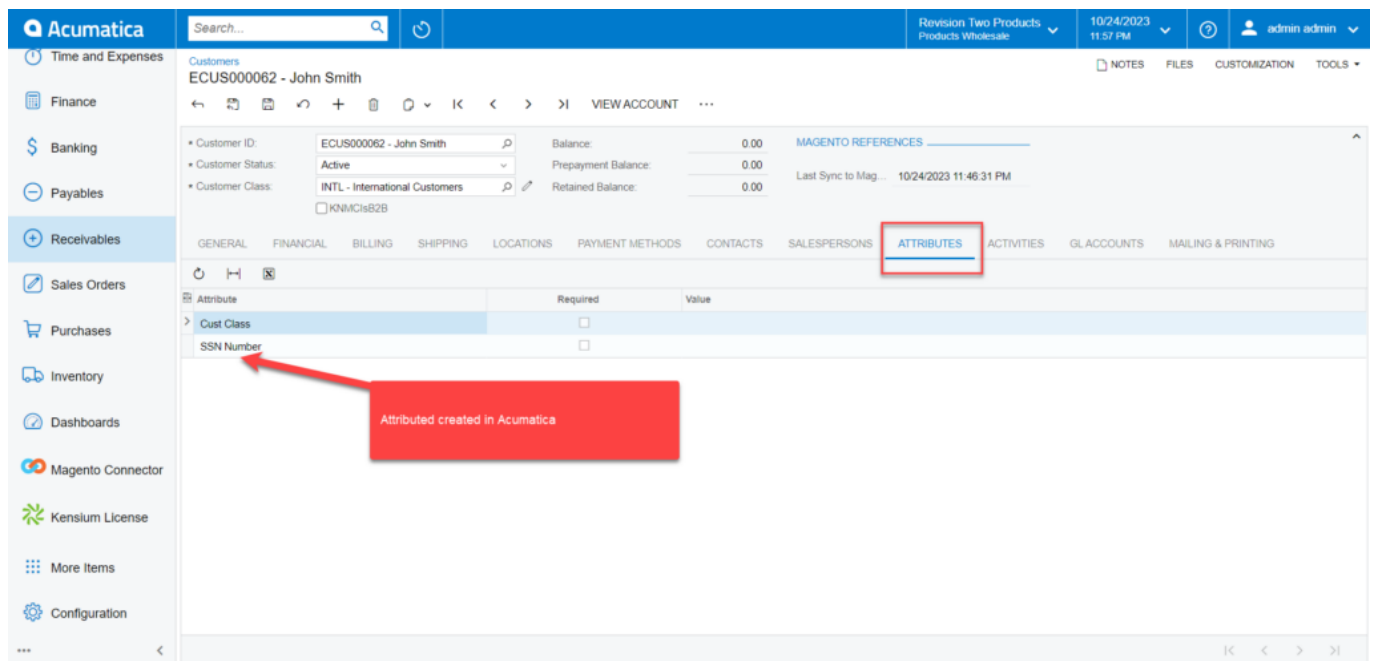
Default values on recommended customer attribute mapping

- **Get New Attributes:**

Upon clicking the [Get New Attributes] a Grid Slider will open up and here you find the list of Acumatica Attributes which are not yet present in Magento. Provide a screenshot of the Grid.

To create any attribute, click on the Create button and it will open up the Magento Customer Attribute Form with the loaded Acumatica attribute data. Provide the Screenshot of the form. After configuring the attribute data in the form click save to create the attribute in the Magento.

Once the attribute is saved it will be available for the mappings.



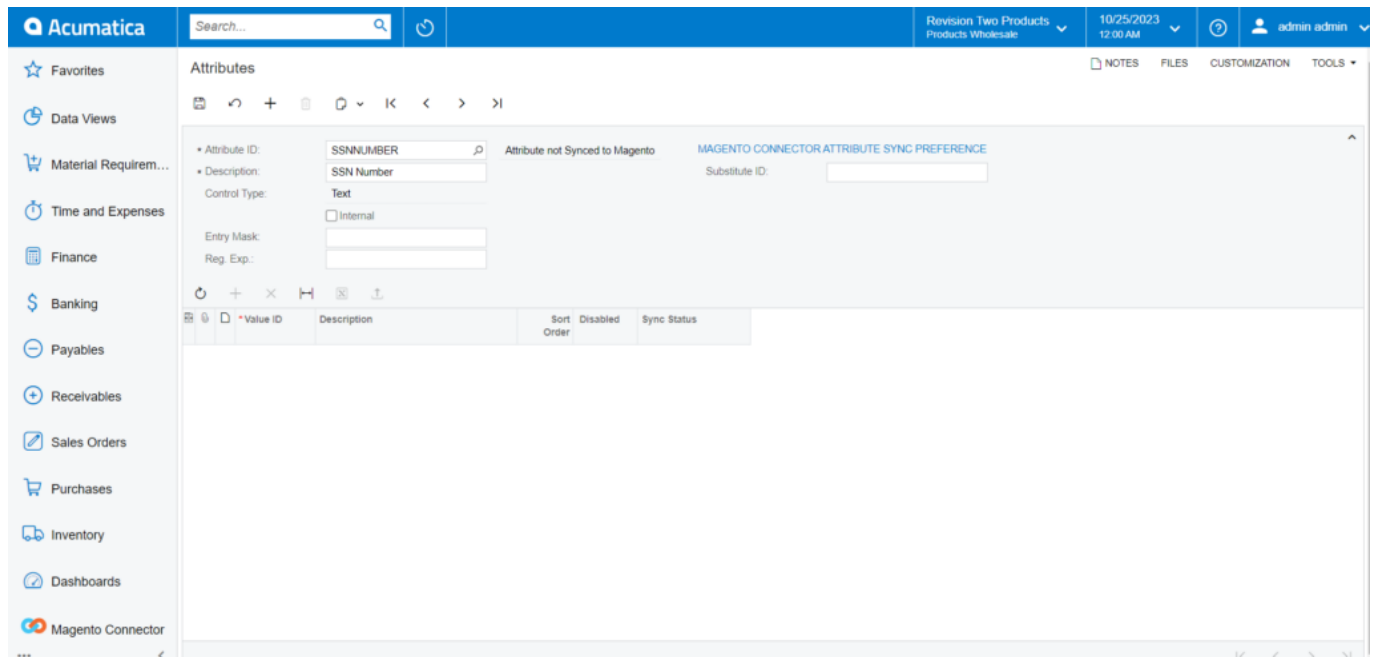
The screenshot shows the Acumatica interface for a customer named John Smith (ECUS000062). The 'Attributes' tab is selected in the top navigation bar. Below the tab, a table lists attributes:

| Attribute | Required | Value |
|------------|--------------------------|-------|
| Cust Class | <input type="checkbox"/> | |
| SSN Number | <input type="checkbox"/> | |

A red arrow points to the 'SSN Number' attribute, and a red box contains the text 'Attributed created in Acumatica'.

Created New Attributes displayed

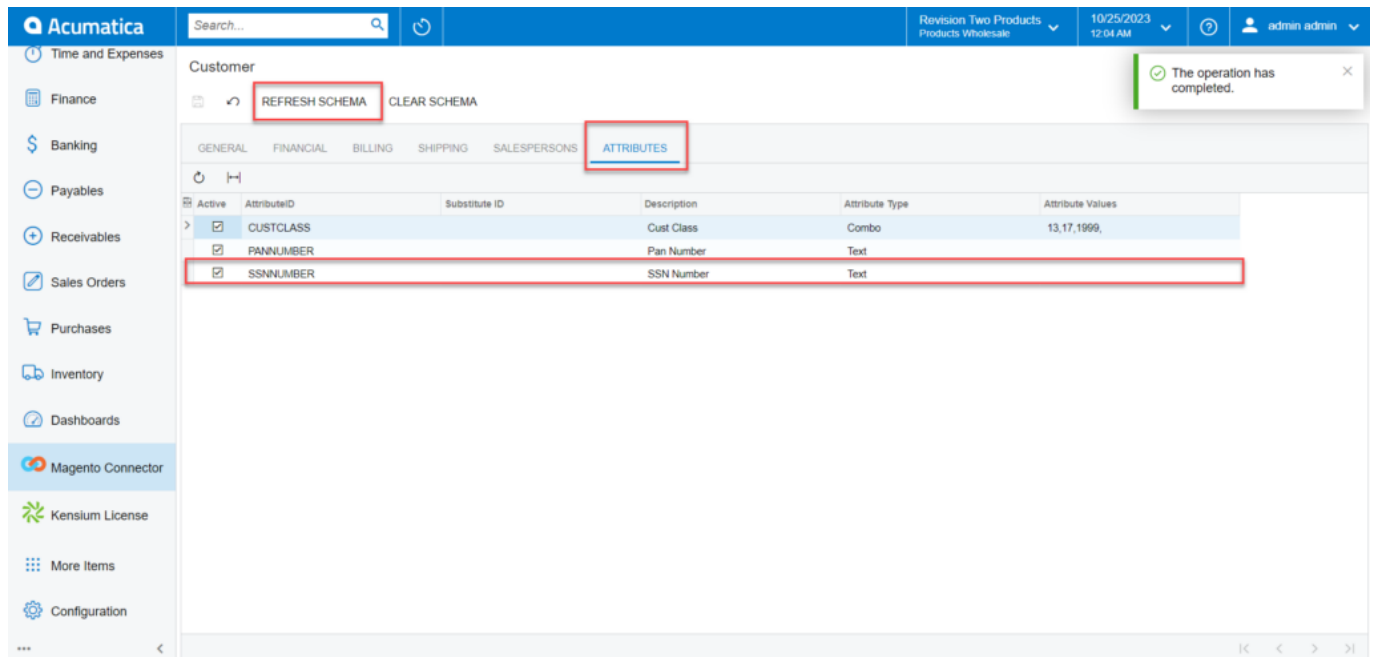
Go to the Attributes section.



The screenshot shows the Acumatica interface with the 'Attributes' section open. The left sidebar contains various navigation items: Favorites, Data Views, Material Requirement..., Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Magento Connector. The main area is titled 'Attributes' and contains a form for configuring an attribute. The form includes fields for 'Attribute ID' (SSNNUMBER), 'Description' (SSN Number), 'Control Type' (Text), 'Entry Mask', and 'Reg. Exp.'. There is a checkbox for 'Internal' and a 'Substitute ID' field. A status message indicates 'Attribute not Synced to Magento'. A 'MAGENTO CONNECTOR ATTRIBUTE SYNC PREFERENCE' section is also visible. Below the form is a table with columns: Value ID, Description, Sort Order, Disabled, and Sync Status. The table is currently empty.

Attributes section

Click on the Customer Schema and click on the Refresh Schema the SSN Number, the newly created attribute should be displayed within Acumatica.



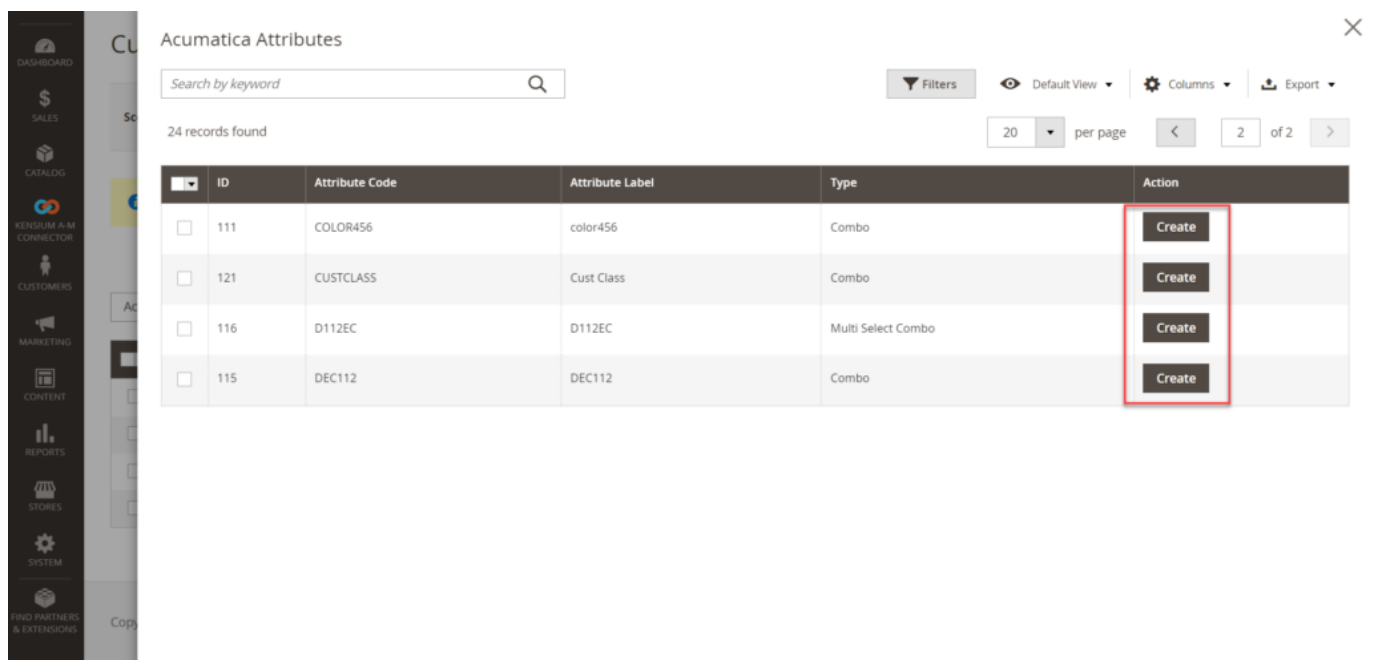
Customer

REFRESH SCHEMA CLEAR SCHEMA

GENERAL FINANCIAL BILLING SHIPPING SALESPERSONS ATTRIBUTES

| Active | AttributeID | Substitute ID | Description | Attribute Type | Attribute Values |
|-------------------------------------|-------------|---------------|-------------|----------------|------------------|
| <input checked="" type="checkbox"/> | CUSTCLASS | | Cust Class | Combo | 13,17,1999, |
| <input checked="" type="checkbox"/> | PANNUMBER | | Pan Number | Text | |
| <input checked="" type="checkbox"/> | SSNNUMBER | | SSN Number | Text | |

New attributes creation



Acumatica Attributes

Search by keyword

Filters Default View Columns Export


24 records found 20 per page 2 of 2

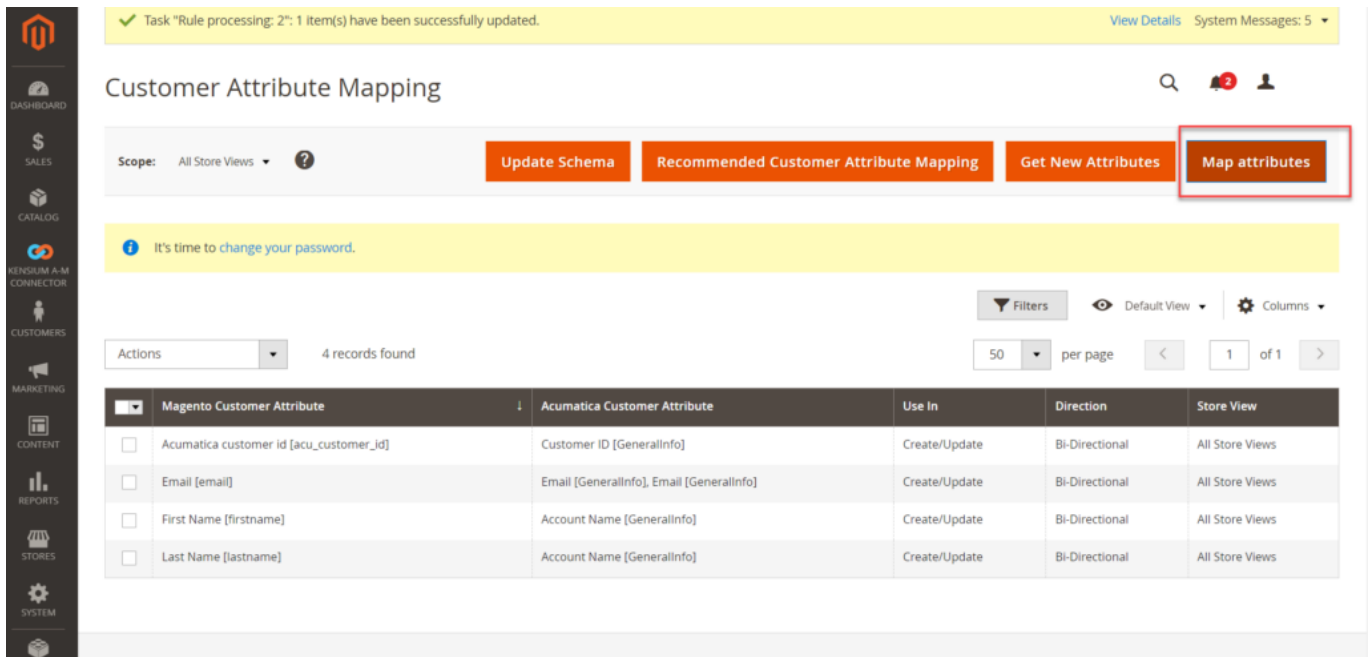
| ID | Attribute Code | Attribute Label | Type | Action |
|-----|----------------|-----------------|--------------------|--------|
| 111 | COLOR456 | color456 | Combo | Create |
| 121 | CUSTCLASS | Cust Class | Combo | Create |
| 116 | D112EC | D112EC | Multi Select Combo | Create |
| 115 | DEC112 | DEC112 | Combo | Create |

Click on [Create] for new attributes

The next screenshot is not available from Magento in the instance.

1. Map Attributes:

 This feature allows you to configure to map the customer attributes. You can map the Magento Customer Attributes with the Acumatica Customer attribute. The mapping of customer attributes could be bi-directional. You will have 4 dropdowns as shown in the following figures.



Task "Rule processing: 2": 1 item(s) have been successfully updated. [View Details](#) System Messages: 5

Customer Attribute Mapping

Scope: All Store Views [?](#) [Update Schema](#) [Recommended Customer Attribute Mapping](#) [Get New Attributes](#) [Map attributes](#)

It's time to [change your password](#).

Filters [Default View](#) [Columns](#)

Actions 4 records found 50 per page 1 of 1

| | Magento Customer Attribute | Acumatica Customer Attribute | Use In | Direction | Store View |
|--------------------------|---|--|---------------|----------------|-----------------|
| <input type="checkbox"/> | Acumatica customer id [acu_customer_id] | Customer ID [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Email [email] | Email [GeneralInfo], Email [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | First Name [firstname] | Account Name [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |
| <input type="checkbox"/> | Last Name [lastname] | Account Name [GeneralInfo] | Create/Update | Bi-Directional | All Store Views |

Option to Map the Attributes

Upon clicking the **[Map Attributes]** the following pop-up will appear on your screen.

X

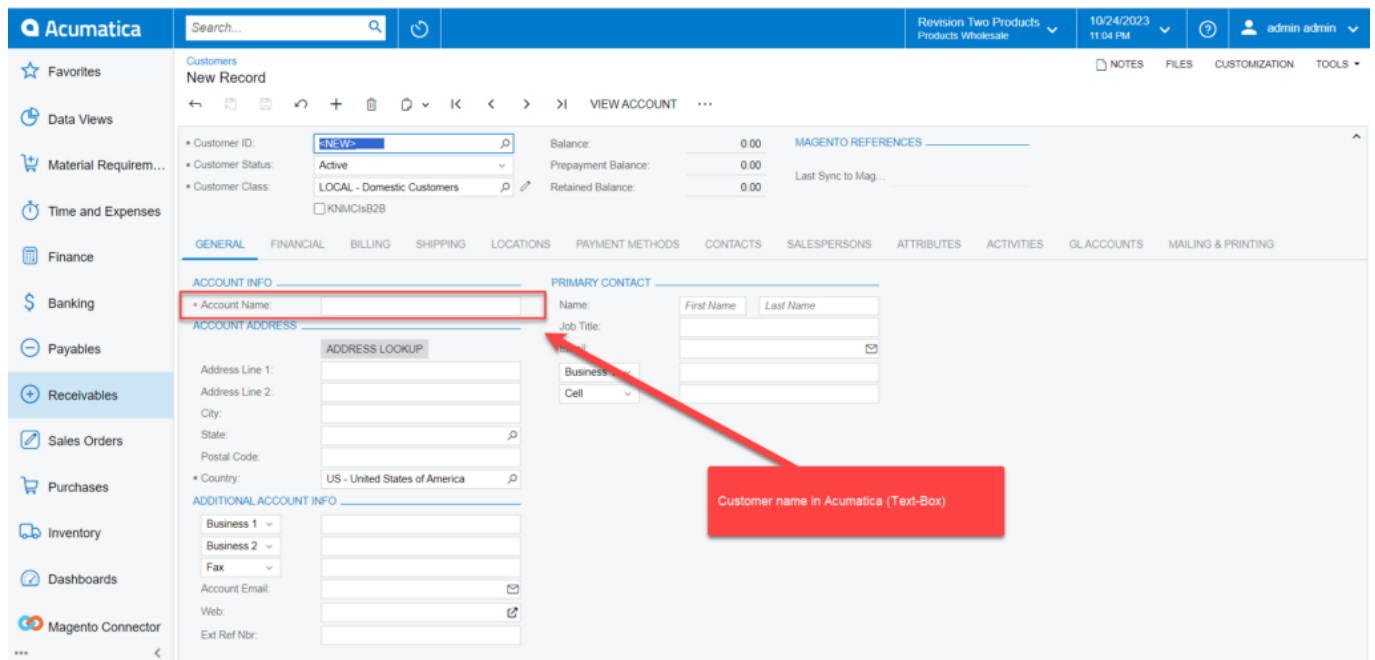
Customer Attribute Mapping

| Magento Customer Attribute | Acumatica Customer Attribute | Use In | Direction |
|--|--|--|--|
| <input type="text" value="Please select"/> | <input type="text" value="Please select"/> | <input type="text" value="Please Select"/> | <input type="text" value="Please Select"/> |
| <div>ADD</div> | | | |
| <div>Save</div> | | | |

Pop-Up upon clicking the map Attributes

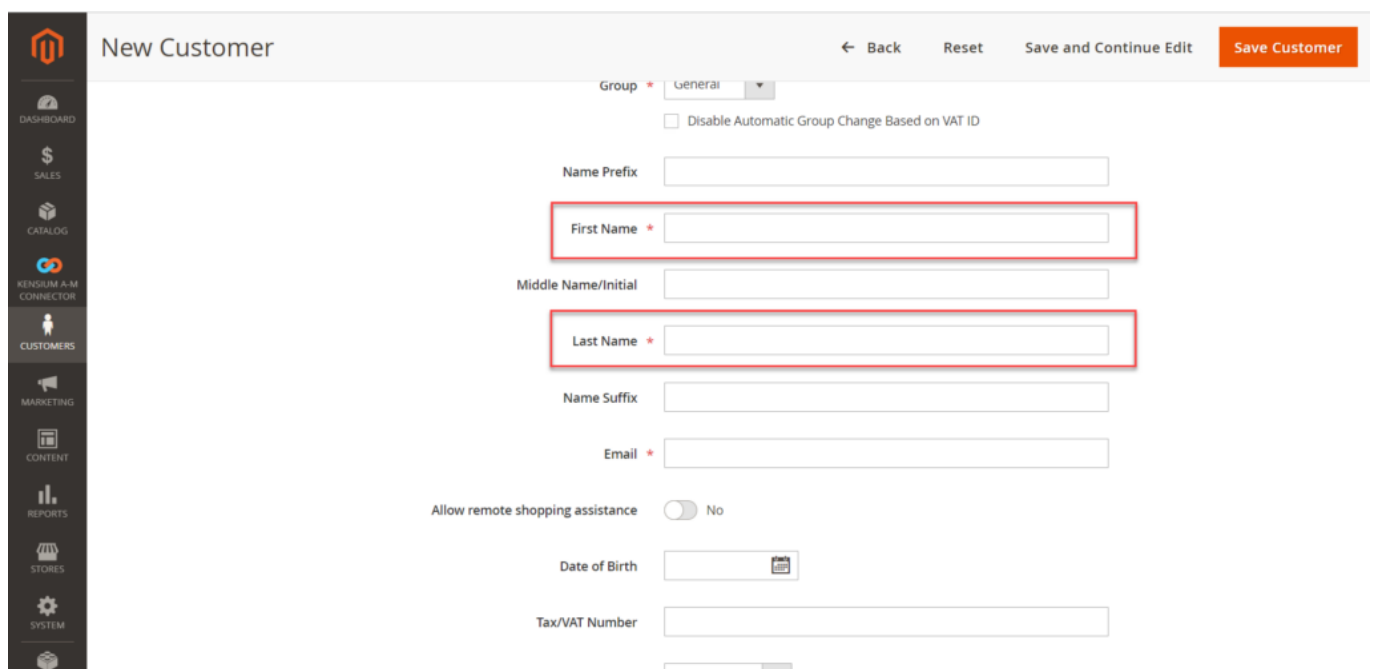
| Field | Field Type | Description | |
|------------------------------|------------------|--|--|
| Magento Customer Attribute | Search Drop-down | Select the field which you want to map with the Acumatica from Magento. | |
| Acumatica Customer Attribute | Search Drop-down | Select the Acumatica field which should be mapped with the Magento field. | |
| Use In | Search Drop-down | Select the option from the following drop-down list. - Create - Update - Create/ Update | |
| Direction | Search Drop-down | Select the direction from the drop-down. For Customers, you will have the option for bi-directional as customer records will be having both in Magento and Acumatica. - Acumatica to Magento - Magento to Acumatica - Bi-Directional If you select only one direction then updates will always be triggered from one side, i.e., the selected side. If you select Bi-Directional then the updates will be triggered from both the end. | |

Since in Acumatica, the Account name refers to the Customer name. However, in Magento Customer name is defined as two separate text boxes first name and last name.



The screenshot shows the Acumatica 'New Record' form for a customer. The 'Account Name' field is highlighted with a red box. A red arrow points from a text box labeled 'Customer name in Acumatica (Text-Box)' to the 'Account Name' field. The form includes various tabs like GENERAL, FINANCIAL, BILLING, SHIPPING, LOCATIONS, PAYMENT METHODS, CONTACTS, SALESPERSONS, ATTRIBUTES, ACTIVITIES, GL ACCOUNTS, and MAILING & PRINTING. The 'Account Name' field is part of the 'ACCOUNT INFO' section.

Customer Name Field in Acumatica



The screenshot shows the 'New Customer' form in a system. The 'First Name' and 'Last Name' fields are highlighted with red boxes. The form includes fields for Name Prefix, Middle Name/Initial, Name Suffix, Email, Date of Birth, and Tax/VAT Number. The 'First Name' and 'Last Name' fields are required, as indicated by the red asterisks. The 'Email' field is also required. The 'Date of Birth' field has a calendar icon. The 'Tax/VAT Number' field is optional. The 'Allow remote shopping assistance' toggle is set to 'No'.

Customer name is divided into First Name and Last Name



KENSIUM

Adobe Connector

The Account Name will be mapped with the Customer's First Name and Last Name in Magento.

In case you only have one name in Acumatica then at the time of mapping Magento will enter the name in the first name and the last name there will be a dot as it's a mandatory field.

