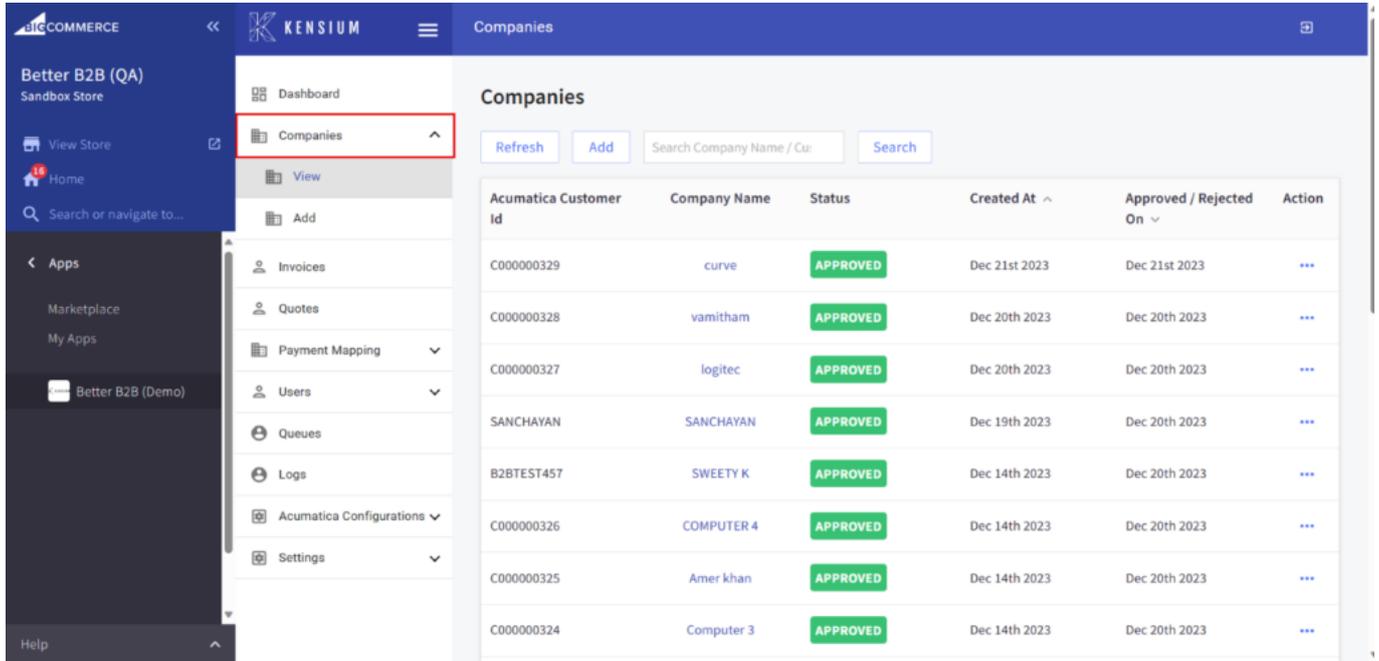


Managing Companies in Better B2B

- Under the Companies option in Better B2B you will be able to view and add companies. Upon clicking on the Companies on the left panel the options will be visible.

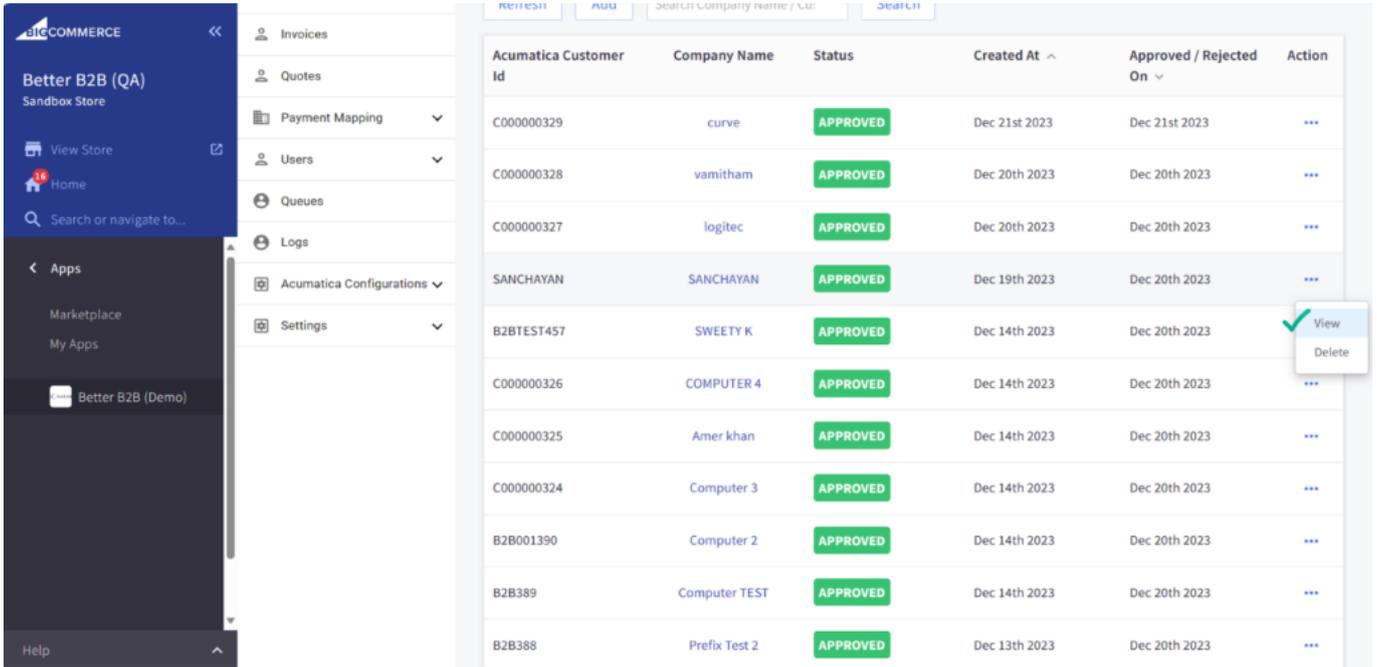


Option to View Companies in Better B2B

In this section you will have the following columns:

- Acumatica Customer ID
- Company Name
- Status
- Created at
- Approved/ Rejected on
- Action

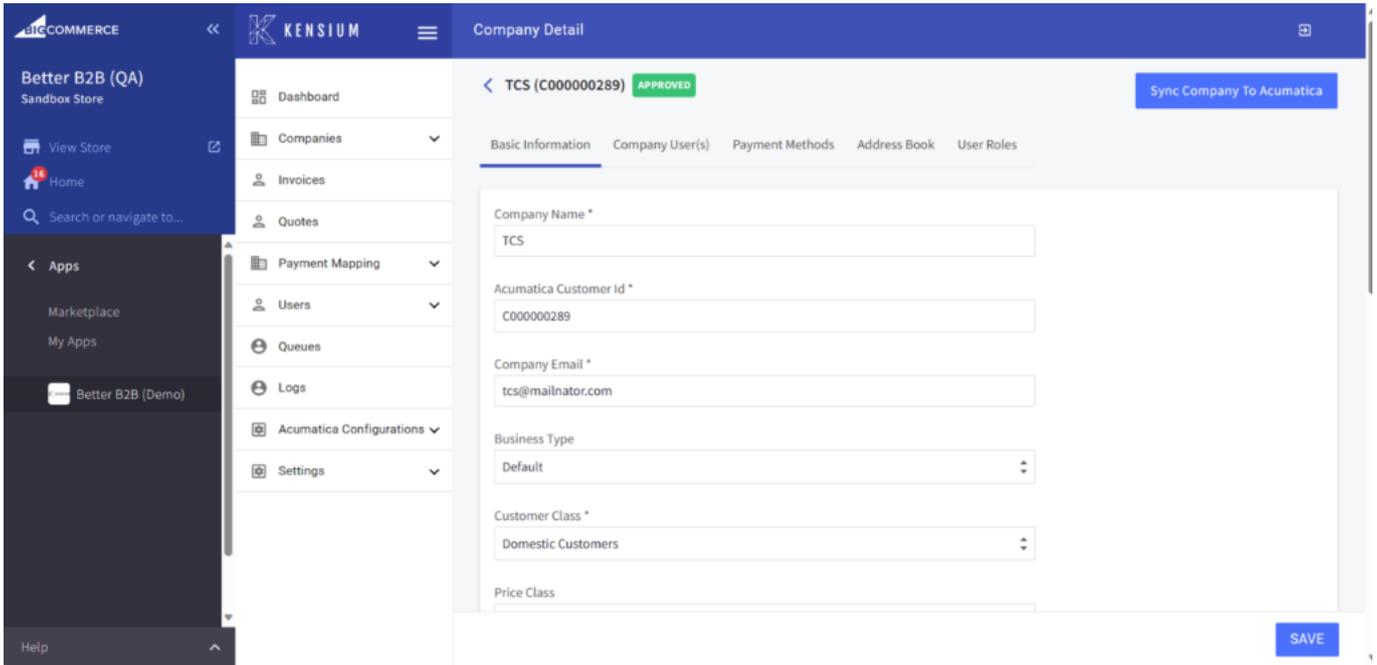
The Action button includes [Views] and [Delete]. The view option allows you to view the company details in B2B which have been synced from Acumatica.



Acumatica Customer Id	Company Name	Status	Created At	Approved / Rejected On	Action
C000000329	curve	APPROVED	Dec 21st 2023	Dec 21st 2023	...
C000000328	vamitham	APPROVED	Dec 20th 2023	Dec 20th 2023	...
C000000327	logitec	APPROVED	Dec 20th 2023	Dec 20th 2023	...
SANCHAYAN	SANCHAYAN	APPROVED	Dec 19th 2023	Dec 20th 2023	...
B2BTEST457	SWEETY K	APPROVED	Dec 14th 2023	Dec 20th 2023	View Delete
C000000326	COMPUTER 4	APPROVED	Dec 14th 2023	Dec 20th 2023	...
C000000325	Amer khan	APPROVED	Dec 14th 2023	Dec 20th 2023	...
C000000324	Computer 3	APPROVED	Dec 14th 2023	Dec 20th 2023	...
B2B001390	Computer 2	APPROVED	Dec 14th 2023	Dec 20th 2023	...
B2B389	Computer TEST	APPROVED	Dec 14th 2023	Dec 20th 2023	...
B2B388	Prefix Test 2	APPROVED	Dec 13th 2023	Dec 20th 2023	...

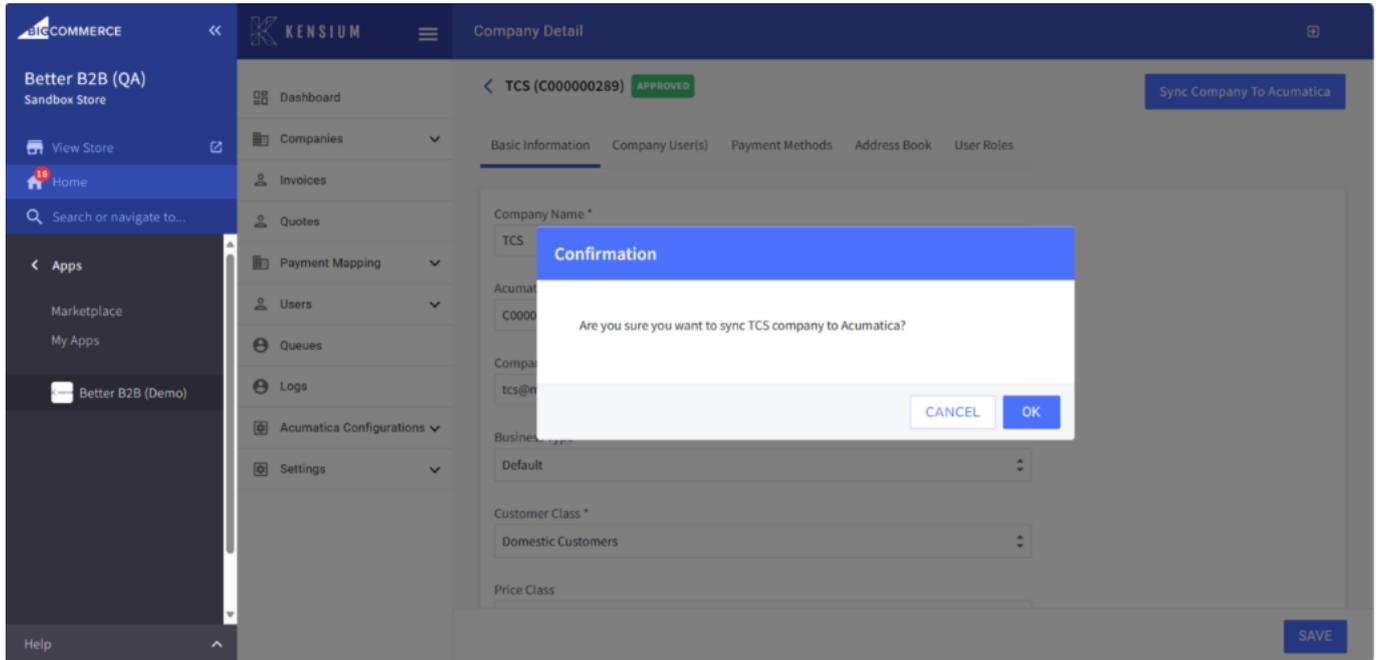
View and Delete option in Companies.

Upon clicking on the [View] button application will redirect you to a new page with all the company details. This includes the Basic Information, Company User(s), Payment Methods, Address Book, and User Roles as shown below. We have discussed these options in the manual in detail.



Viewing the Company

The application allows you to [Sync Company to Acumatica] and upon clicking you will get a confirmation message pop up with an [OK] and [Cancel] option as shown below.

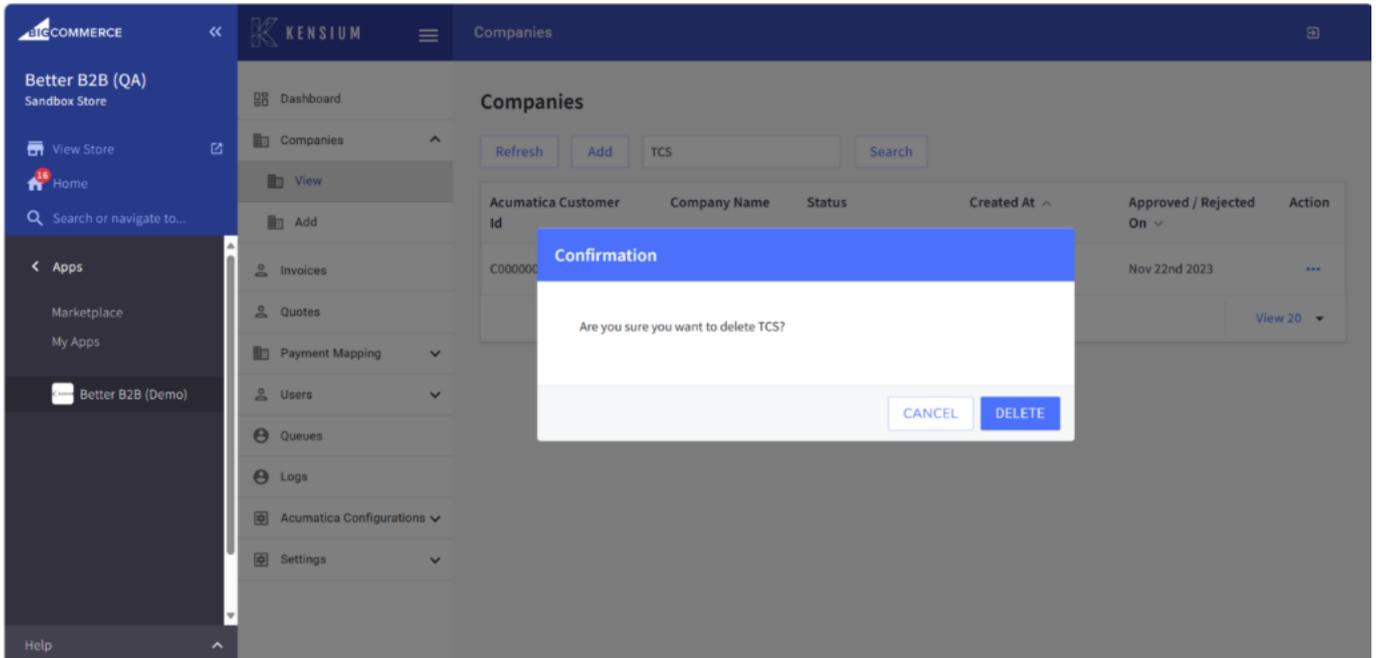


Confirmation Message for sync to Acumatica

In the Company Detail page, you can make changes as per your business requirements and [Save] it.

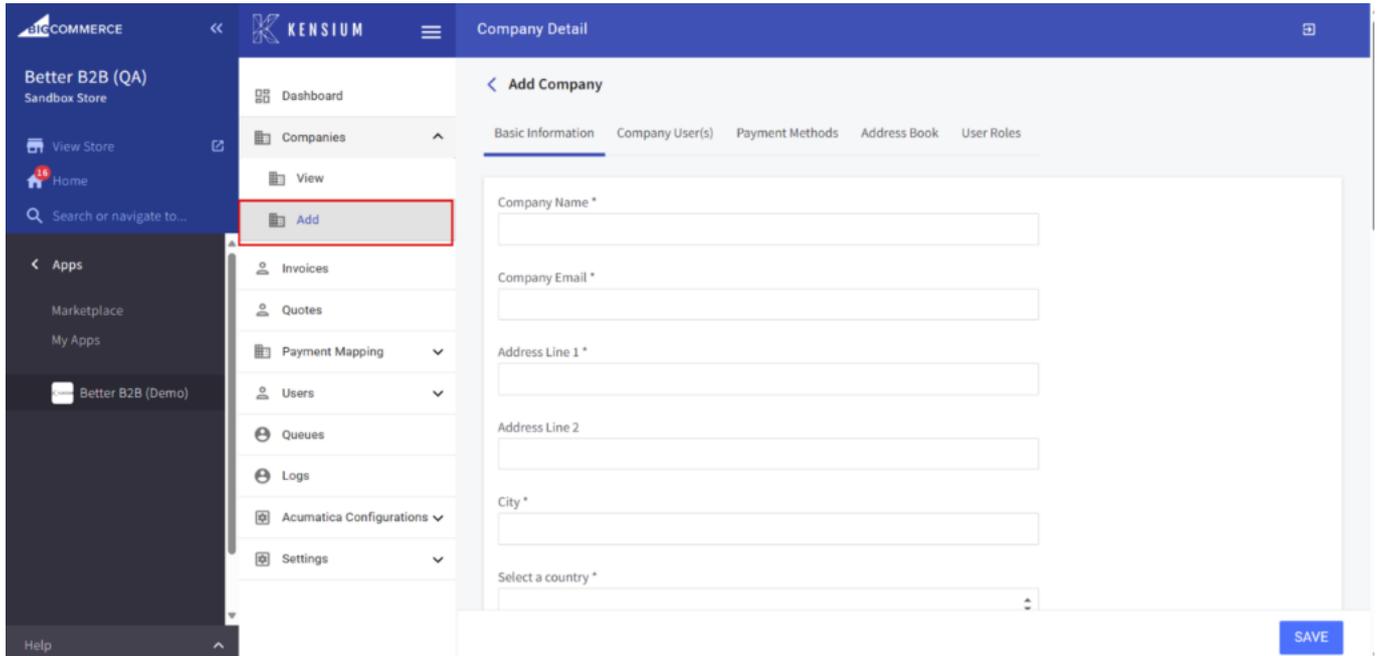
The [Delete] option under action will allow you to delete the Company and related information from the BetterB2B.

Upon clicking on [Delete] you will get a pop up with a [Delete] and [Cancel] option.



Confirmation Message before deleting

The [Add] option allows you to enter the Company Details directly into Better B2B. Upon clicking on the Add option you will be redirected to the following screen to enter the Basic Information, Company Email, Address Line, Country, State, Zip Code etc. Field with the asterisk marks are the mandatory fields.



Add Company Details

Apart from Company details you can add the following from here which we have explained in detail in the manual.

- Company User[s]
- Payment Method
- Address Book
- User Roles