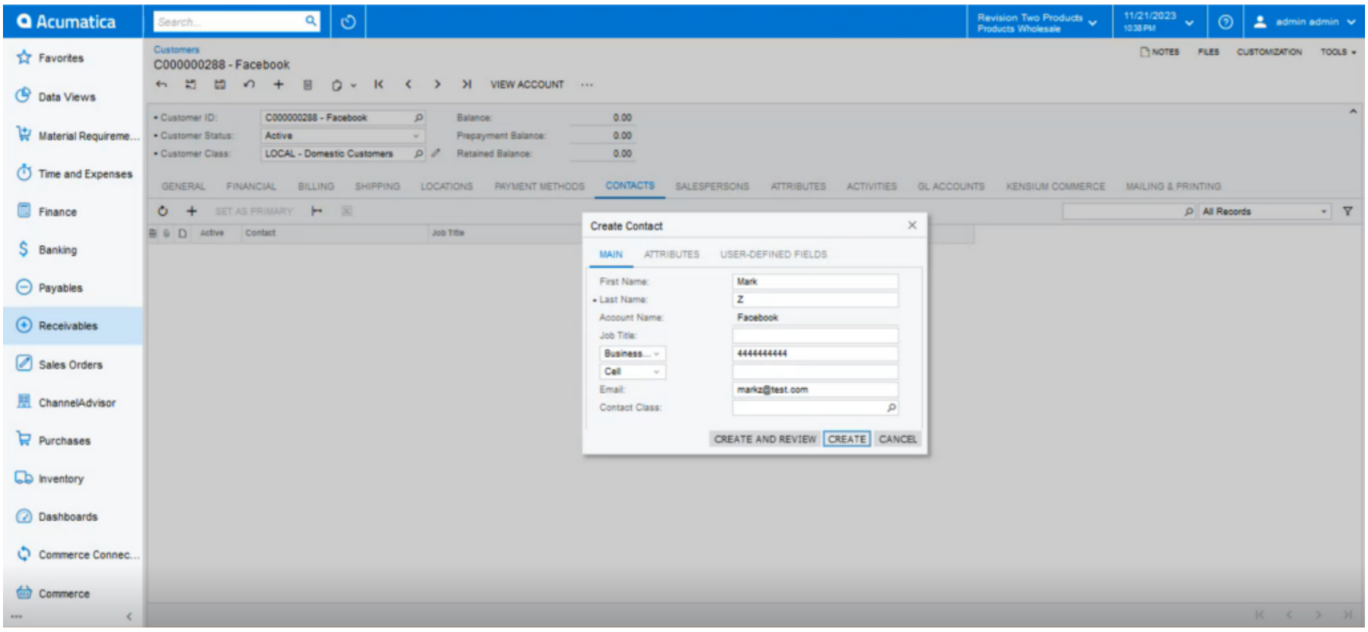
Managing Customer Contact Sync in B2B

You can sync the Customer contacts of Acumatica to B2B. The contacts of Acumatica will be treated as users in B2B.

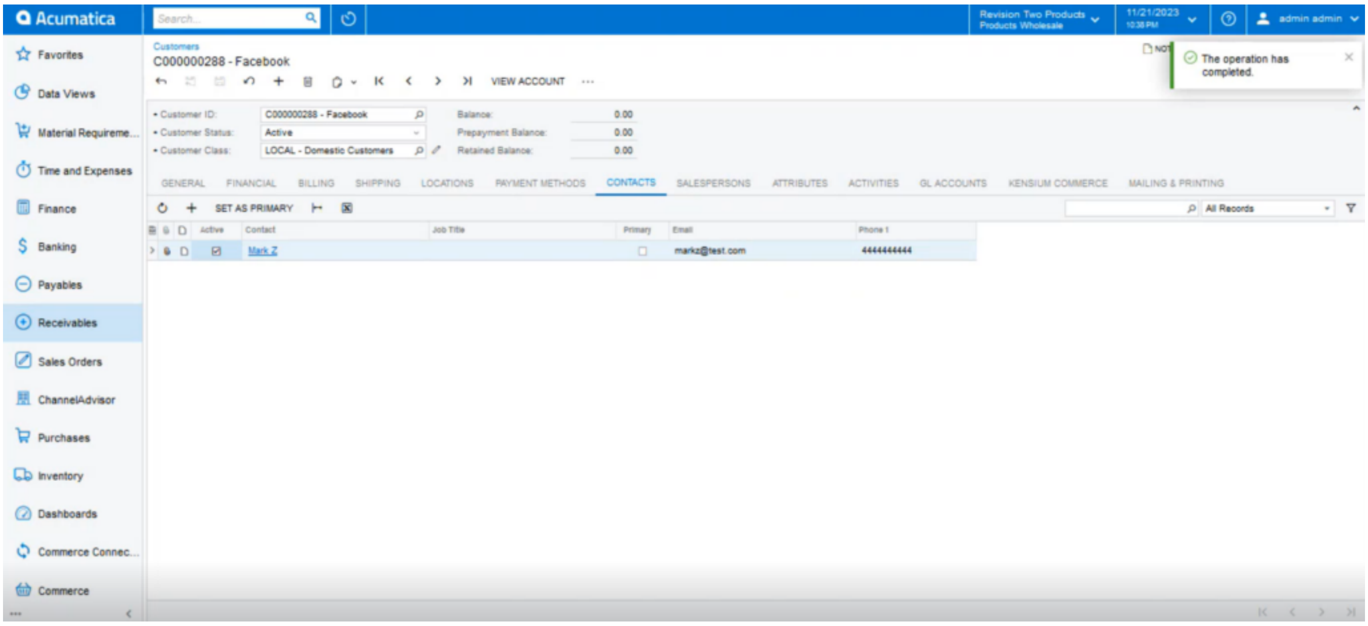
You need to follow the steps for successful synchronization.

Step 1: On the Customer Screen create a new contact.



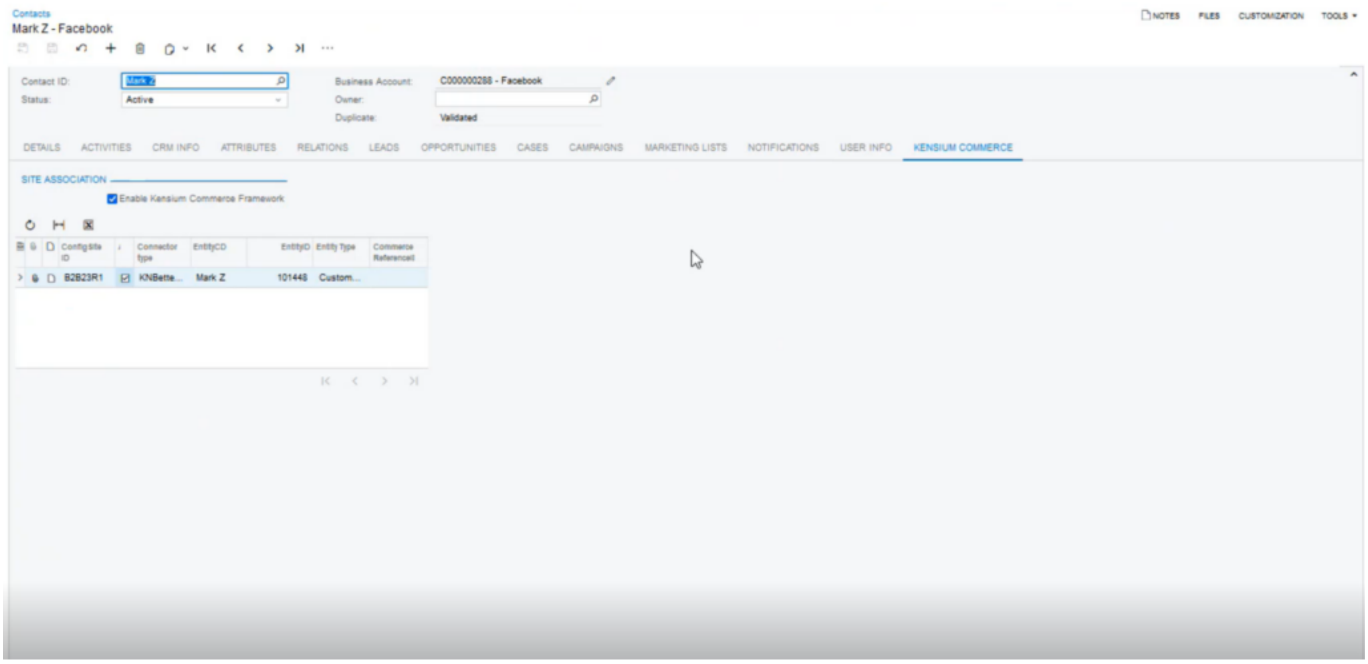
Creating a customer within Acumatica

Step 2: The contact will be reflected on the grid.



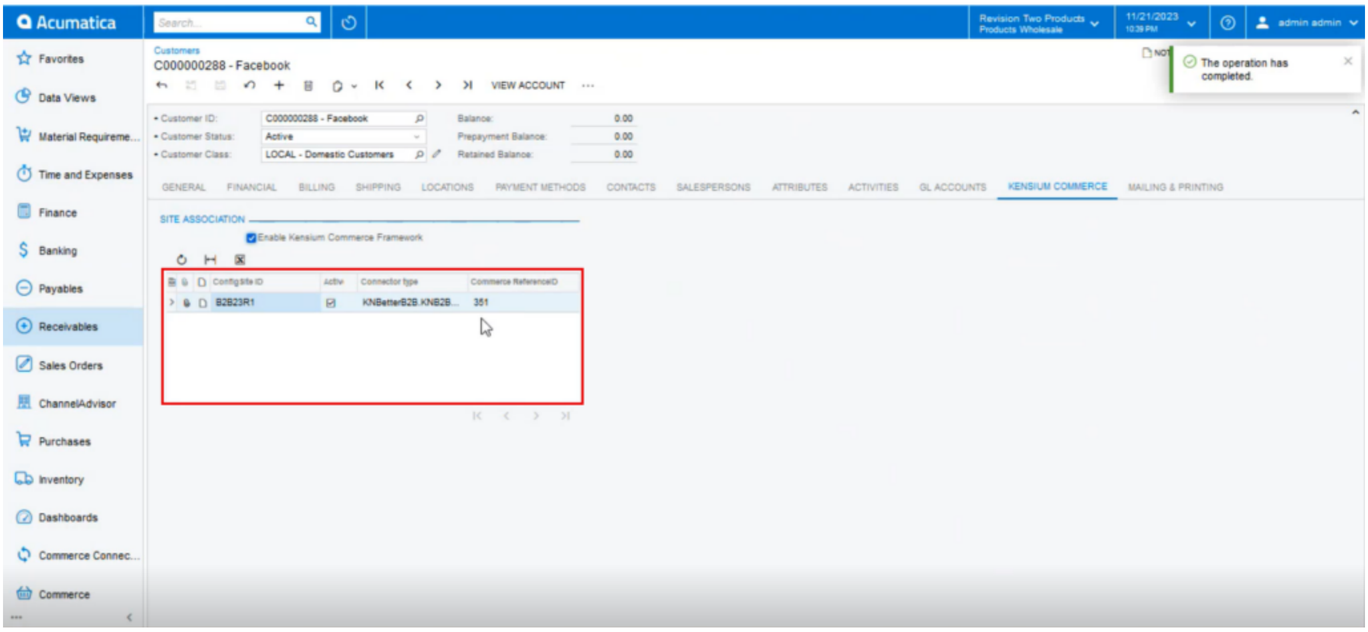
Contact Created against the Customer.

Step 3: Click on the Contact a new pop-up will appear. You will be able to view an option for [Kensium Commerce]. Click on Kensium Commerce Check Enable Kensium Commerce Framework under the site association. You need to enable the Connection Type.



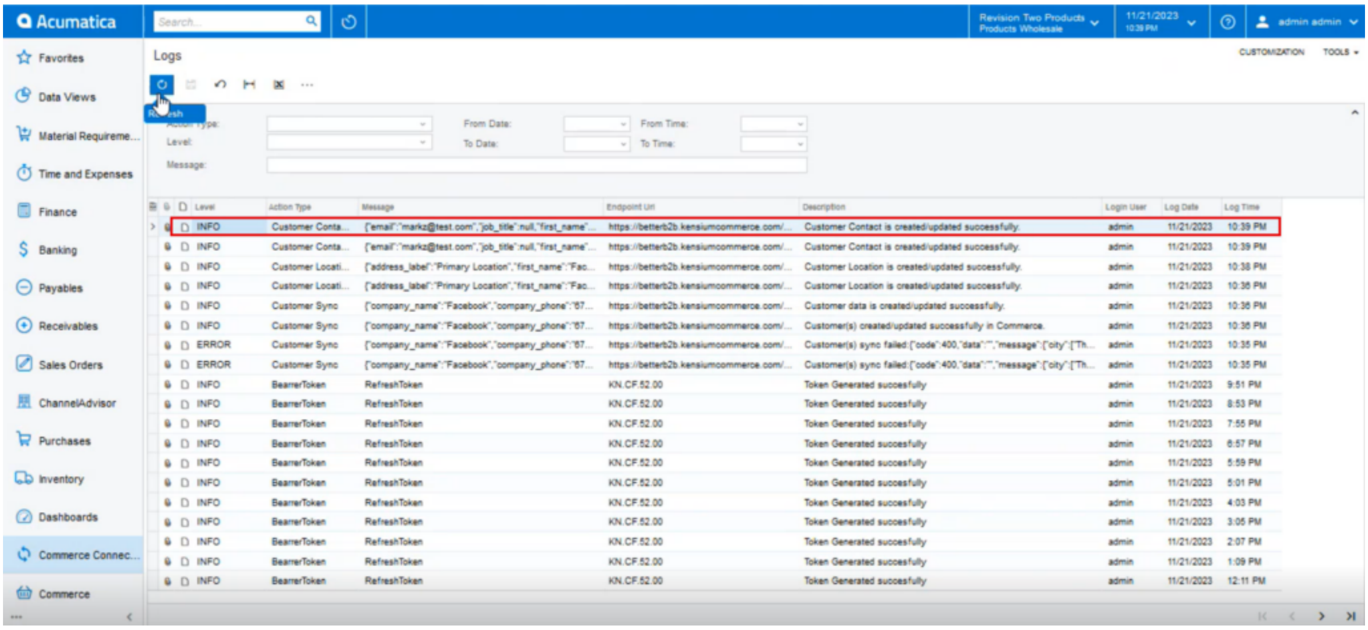
Illustration

Step 4: Once the customer, contacts and location are synced the commerce reference ID will be generated and updated under the Commerce Reference ID.



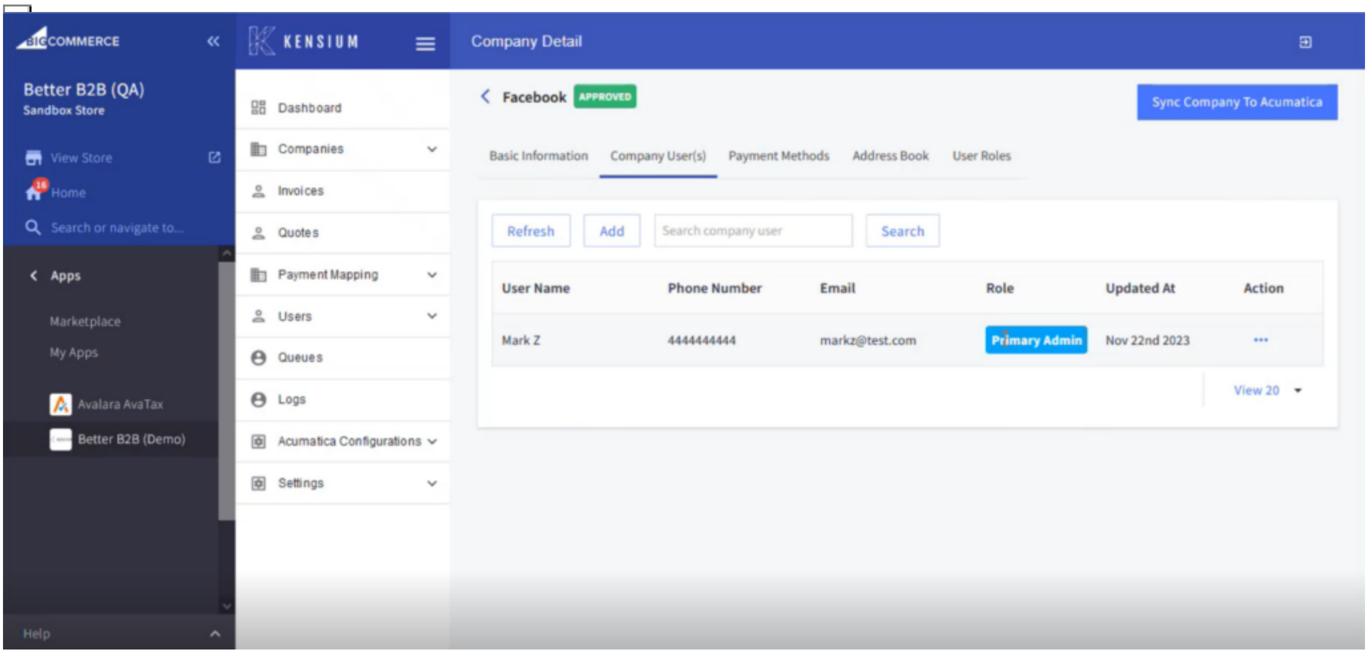
The commerce reference ID

Step 5: Go to the Customer Log and you will be able to view the customer contact synced.



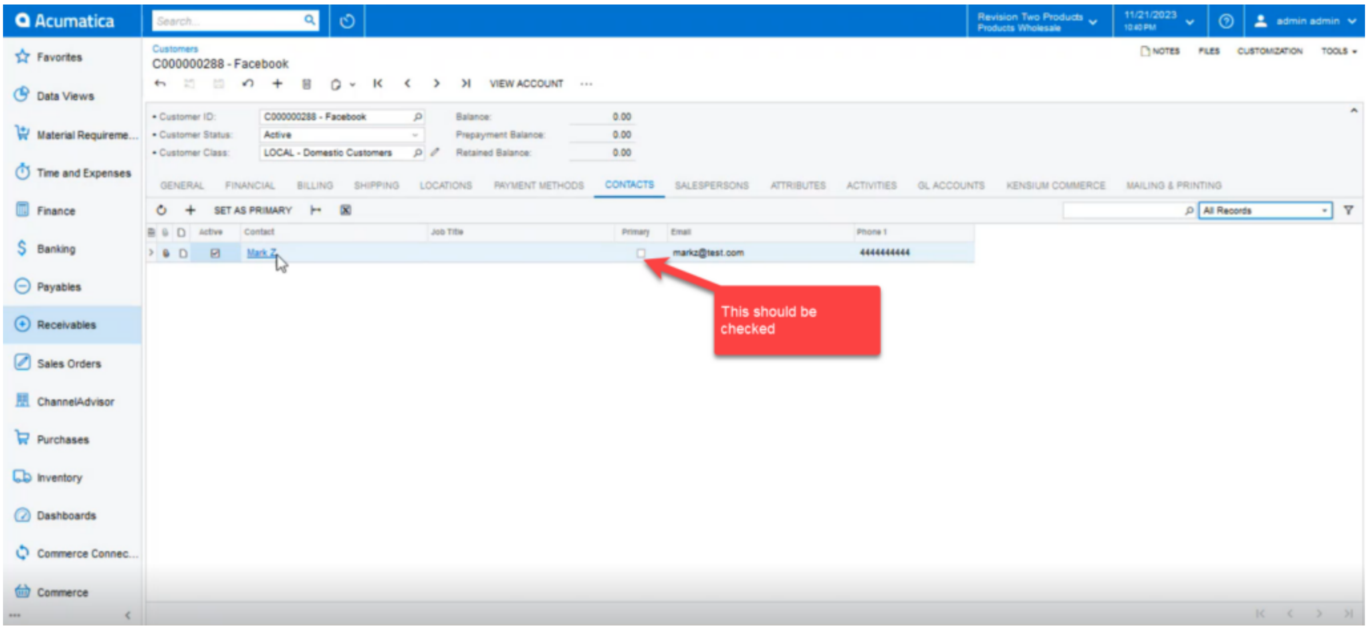
Customer Contact ID synced to Better B2B

Step 6: Go to the B2B app and click on [Company]. Click on the [Company User(s)] you will be able to see the Username synced from Acumatica. Here the user role is [Primary Admin].



User Name synced in the Company User(s)

Step 7: The primary contact check box should be checked in Acumatica then only you can view the same as a Primary User Admin.



The Primary Check box should be checked.