

Managing Customer sync from Acumatica to **B2B**

You can sync the customer from Acumatica to B2B. Follow the steps.

Step 1: Create a Customer within Acumatica. While creating the Customer you must create the Customer type as B2B. Also, the email address is mandatory.



The customer type should be B2B and Account Email is mandatory

Step 2: Click on the [Kensium Commerce] Tab. Upon clicking you need to enable the checkbox for [Enable Kensium Commerce Framework] in the Site Association.

Check the box of the connection Type [KNB] and save the screen.





Acumatica	Search Q 🖸	Revision Two Products Products Wholesale	11/20/2023 🗸 🕥 💄 admin admin 🗸
C Data Views	Customers C000000012 - John Kenny		NOTES FLES CUSTOMIZATION TOOLS -
Time and Expenses	CONCOUNT SUM NEW ACCOUNT		
Finance	Custo Save (Christ) [000000012 // Balance: 0.00 Customer Status: Active Pressweet Balance: 0.00		~
\$ Banking	Customer Class: LOCAL - Domestic Customers		-
Projects	GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PRVMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES OL ACCOUNT	NTS KENSIUM COMMERCE	MAILING & PRINTING
Payables	SITE ASSOCIATION		
Receivables	O H BE B 6 D ConfigSte D Activ Connector type Commerce Reference/D		
Sales Orders	> D B2BOASTORE NOBerture B2B XN828		
Purchases			
linventory			
2 ^{\$} Payroll	K < > N		
Dashboards			
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Commerce			
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Setting up Kensium Commerce

Step 3: Go to the connector logs under the Reports.

Acumatica	Search	৫ ৩			Revision Two Products Viti/2023 11/21/2023 Revision Wholesale	admin admin •
1 Favorites	Logs					CUSTOMIZATION TOOLS -
Data Views	0 E N H	× ···				
Time and Expenses	Action Type: Level:		From Date: From Time: To Date: To Time:	*		^
Finance	Message:					
S Banking	B G D Level	Action Type	Message	Endpoint Url	Description	Login User
V Danking	> @ D INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
Projects	0 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
	D INFO Customer Location Sync		{"address_label": "Primary Location", "first_name": "John", "la	https://betterb2b.kensiumcommerce.com/api/v1/address/805	Customer Location is created/updated successfully.	admin
 Payables 	6 D INFO	Customer Sync	{"company_name":"John Kenny","company_phone":"33333	https://betterb2b.kensiumcommerce.com/api/v1/company	Customer data is created/updated successfully.	admin
-	6 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
Receivables	0 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
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Sales Orders	0 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
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Purchases	0 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
D	€ D INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
6-6 Inventory	0 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
05	6 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
A Payroll	0 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
O Dashbaarda	6 D INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
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Commerce	<					>
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Customer Sync Details in the Connector Logs





Step 4: Go to the Better B2B and click on the Company.

	«	KENSIUM =	_	Companies					æ
Better B2B (QA) Sandbox Store		B쿱 Dashboard	_	Companies					
View Store		Companies	~	Refresh Add Sea	rch Company Name /	Cu: Search			
 Home Q Search or navigate to 		2 Quotes		Acumatica Customer C	ompany Name	Status	Created At $\ \land$	Approved / Rejected On $ \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! \! $	Action
< Apps	Î	Payment Mapping	~	C000000013	John Kenny	APPROVED	Nov 21st 2023	Nov 21st 2023	
Marketplace		≗ Users	~	C00000012	Anderson	APPROVED	Nov 21st 2023	Nov 21st 2023	View
🕅 Avalara AvaTax	I	Queues Logs		C00000011	TESTDEM01	APPROVED	Nov 21st 2023	Nov 21st 2023	
Better B2B (Demo)		Acumatica Configurations	~	C000000280 A	BRAHAM LINCON	APPROVED	Nov 21st 2023	Nov 21st 2023	
		Ø Settings	~	C00000009	ABP01	APPROVED	Nov 21st 2023	Nov 21st 2023	
				C00000008	MICHEL	APPROVED	Nov 21st 2023	Nov 21st 2023	
				C00000007	QADEMO2	APPROVED	Nov 21st 2023	Nov 21st 2023	
Help				C00000279	Test Company	APPROVED	Nov 20th 2023	Nov 20th 2023	

Customer synced from Acumatica to Better B2B.

Step 5: Clicking on [View] will give you the details including Basic Information, Company(s) User, Payment Methods, Address Book and User Role.





4	\mathbb{K} KENSIUM \equiv	Company Detail	
	Dashboard	C John Kenny APPROVED	
	Companies V	Basic Information Company User(s) Payment Methods Address Book User Roles	
	2 Invoices		
	≙ Quotes	Company Name * John Kenny	
	Payment Mapping V	Acumatica Customer Id *	
	🗳 Users 🗸 🗸	C00000013	
	Queues	Company Email *	
	🕒 Logs	johnkenny@test.com	
	$\textcircled{\begin{tabular}{ll} \hline l}$ Acumatica Configurations \checkmark	Business Type	
	🕸 Settings 🗸 🗸	Default ‡	
		Customer Class *	
		Domestic Customers	
		Price Class	
		*	_
			SAVE

Basic Information of the Company

1	\mathbb{K} KENSIUM \equiv	Company Detail	Ð
	Dashboard	Solution Contraction Contracti	
	E Companies 🗸	Basic Information Company User(s) Payment Methods Address Book User Roles	
	2 Invoices		
	2 Quotes	Billing Address Default Shipping Address	
	Payment Mapping	Primary Address Primary Location	
	🙎 Users 🗸 🗸	156 10th Ave Printing Audress New YORK 10011 156 10th Ave New YORK 10011 New YORK 10011	
	Queues	Phone: 333333333 United States of America Phone: 333333333 Phone: 333333333	A1
	🕒 Logs	FIGHE SASSASSA	<u> </u>
	Acumatica Configurations ~	Refresh Add Search by Keyword Search	
	🕸 Settings 🗸 🗸		
		No Address exists!	



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Address Book is already

The user role is a Predefined role.

⊿	KENSIUM =	Company Detail	
»	28 Dashboard	Solution Contraction Contracti	
	Companies	Basic Information Company User(s) Payment Methods Address Book User Roles	
	2 Invoices		
	2 Quotes	Refresh Add Search company roles Search	
	Payment Mapping	✓ Role Name [↓] Type [↓]	Action
	🚊 Users	Admin Predefined	
	O Queues		View 20 💌
	🕒 Logs		View 20
	Acumatica Configurations		
	Settings	•	

The User Role is pre-defined.





4	K KENSIUM ≡	Roles & Permissions	
»	Dashboard	Role Information Predefined roles cannot be modified	
	🖭 Companies 🗸 🗸	Rel Hand	
	Invoices	Admin	
	🚊 Quotes	Permissions	
	Payment Mapping 🗸	▼ ✓ Manage Companies	
	🛆 Users 🗸 🗸	View Company information Edit Company Information	
	O Queues	 ✓ Manage Users ✓ View Users 	
	e Logs	Add New User	
	Acumatica Configurations ~	Edit User Delete User	
	🛱 Settings 🗸 🗸	 ✓ Manage Roles ✓ View Roles 	
		Add New Role	
		Edit Role	
		✓ Delete Role ✓	
		View Orders	
		✓ Place Order	
		Corder Credit Limit Value	

View Option in Predefined Role Information.

