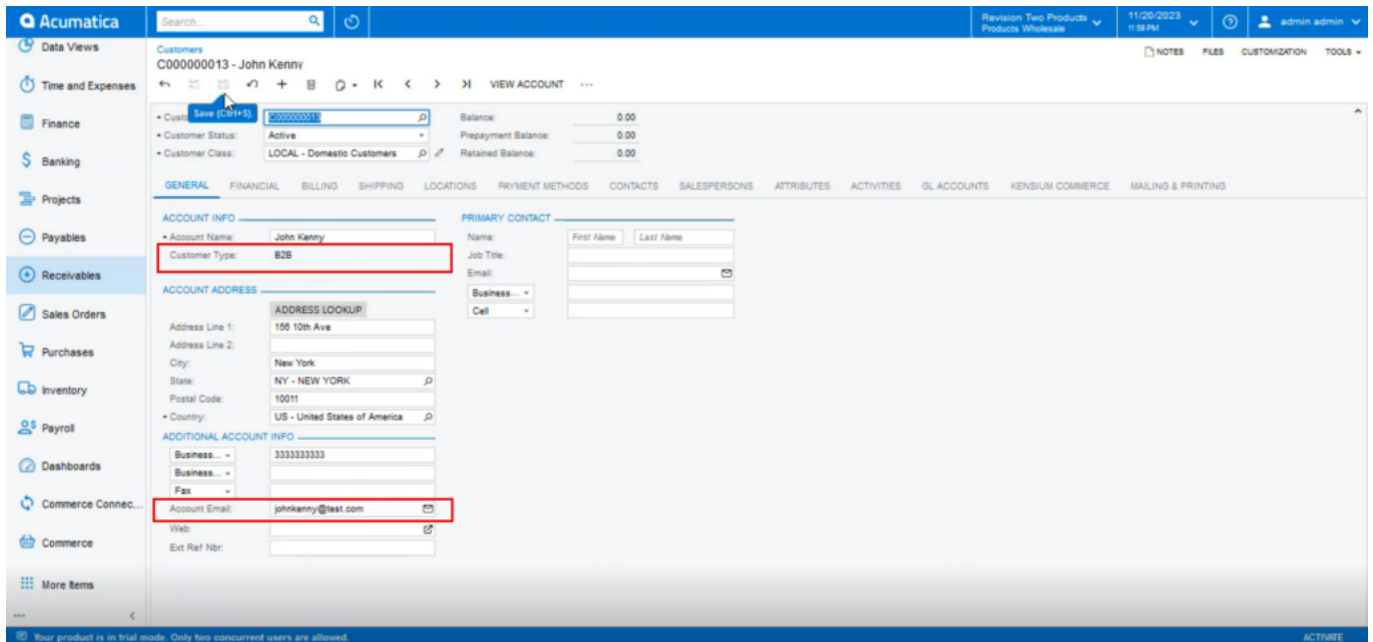


Managing Customer sync from Acumatica to B2B

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.

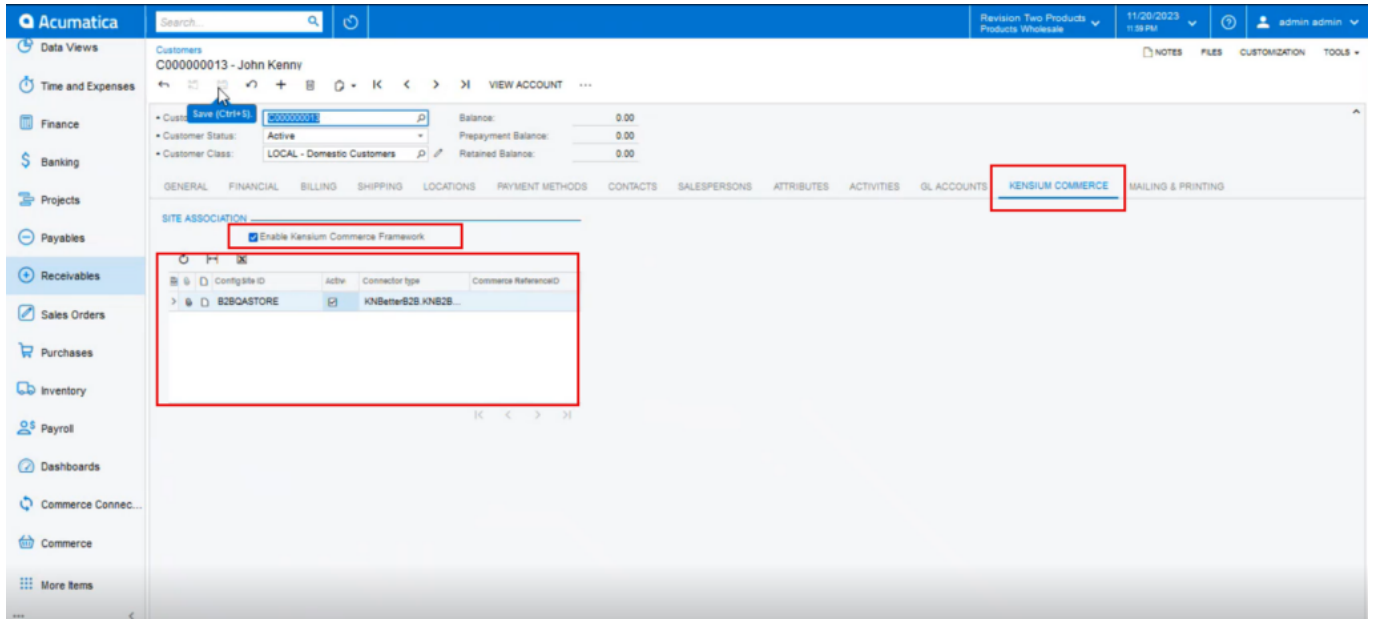


The screenshot shows the Acumatica interface for creating a new customer. The 'Customer Type' is set to 'B2B' and the 'Account Email' is 'johnkenny@test.com'. Both fields are highlighted with red boxes. The form also includes fields for 'Account Name', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Postal Code', 'Country', 'Business', 'Fax', 'Web', and 'Ext Ref Nbr'. The 'Primary Contact' section includes fields for 'Name', 'Job Title', 'Email', 'Business', and 'Cell'.

The customer type should be B2B and Account Email is mandatory

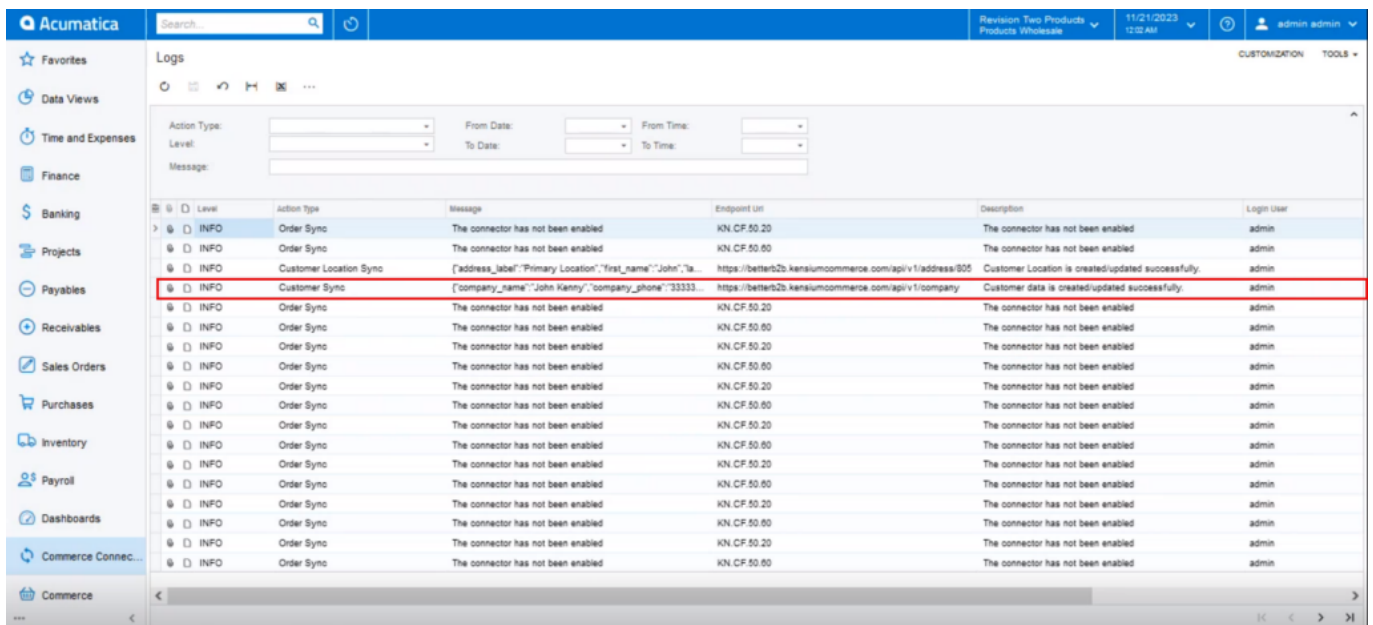
Step 2: Click on the [Kensium Commerce] Tab. Upon clicking you need to enable the checkbox for [Enable Kensium Commerce Framework] in the Site Association.

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



Setting up Kensium Commerce

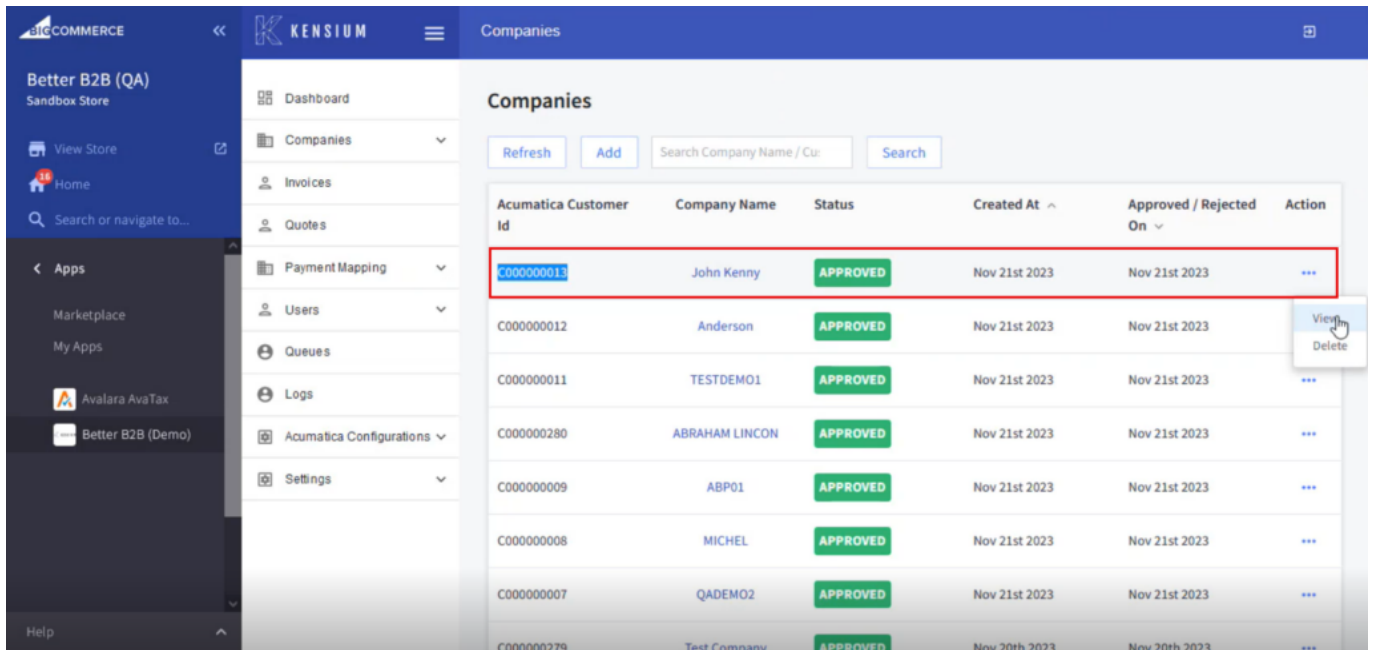
Step 3: Go to the connector logs under the Reports.



Level	Action Type	Message	Endpoint URL	Description	Login User
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
INFO	Customer Location Sync	[address_label] "Primary Location", [first_name] "John", [la...	https://better2b.kensiumcommerce.com/api/v1/address/505	Customer Location is created/updated successfully.	admin
INFO	Customer Sync	[company_name] "John Kenny", [company_phone] "33333...	https://better2b.kensiumcommerce.com/api/v1/company	Customer data is created/updated successfully.	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.20	The connector has not been enabled	admin
INFO	Order Sync	The connector has not been enabled	KN.CF.50.60	The connector has not been enabled	admin

Customer Sync Details in the Connector Logs

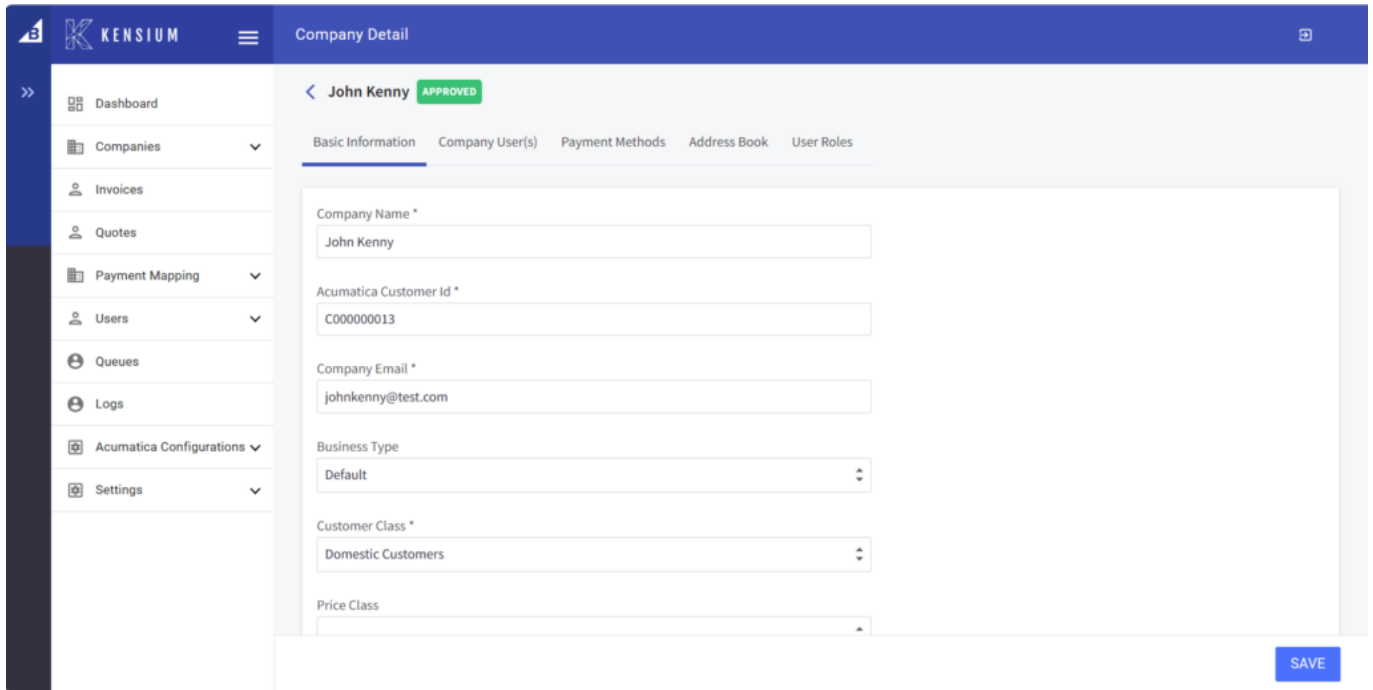
Step 4: Go to the Better B2B and click on the Company.



Acumatica Customer Id	Company Name	Status	Created At	Approved / Rejected On	Action
C000000013	John Kenny	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000012	Anderson	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000011	TESTDEMO1	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000280	ABRAHAM LINCON	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000009	ABP01	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000008	MICHEL	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000007	QADEMO2	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000279	Test Company	APPROVED	Nov 20th 2023	Nov 20th 2023	View

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.



KENSIUM Company Detail

< John Kenny APPROVED

Basic Information Company User(s) Payment Methods Address Book User Roles

Company Name *
John Kenny

Acumatica Customer Id *
C00000013

Company Email *
johnkenny@test.com

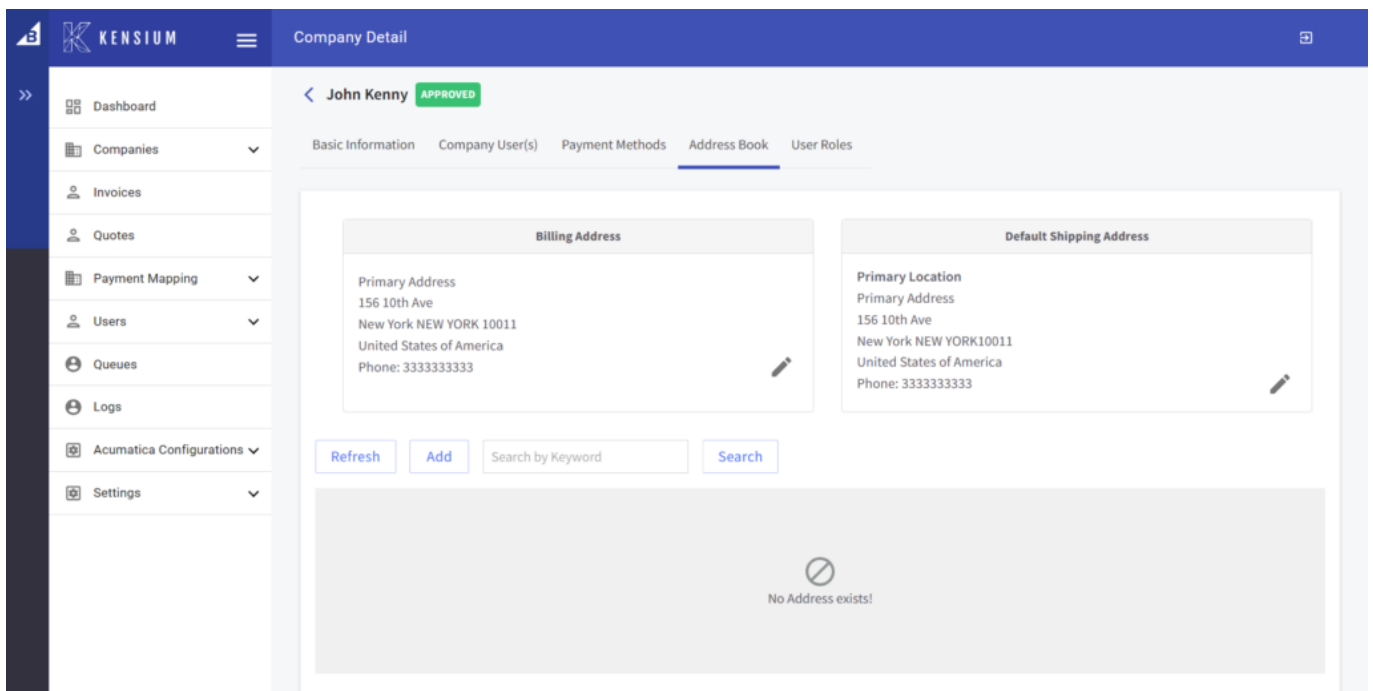
Business Type
Default

Customer Class *
Domestic Customers

Price Class

[SAVE](#)

Basic Information of the Company



KENSIUM Company Detail

< John Kenny APPROVED

Basic Information Company User(s) Payment Methods Address Book User Roles

Billing Address

Primary Address
156 10th Ave
New York NEW YORK 10011
United States of America
Phone: 3333333333

Default Shipping Address

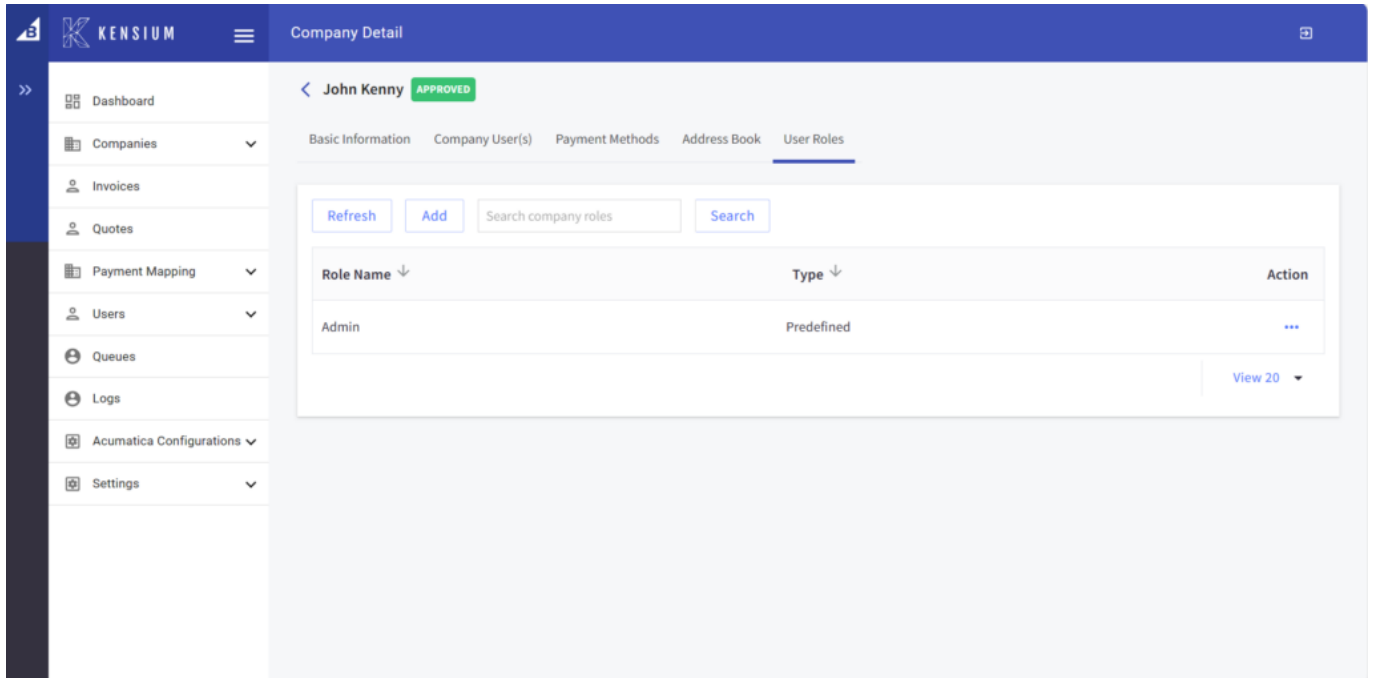
Primary Location
Primary Address
156 10th Ave
New York NEW YORK 10011
United States of America
Phone: 3333333333

[Refresh](#) [Add](#) [Search](#)

No Address exists!

Address Book is already

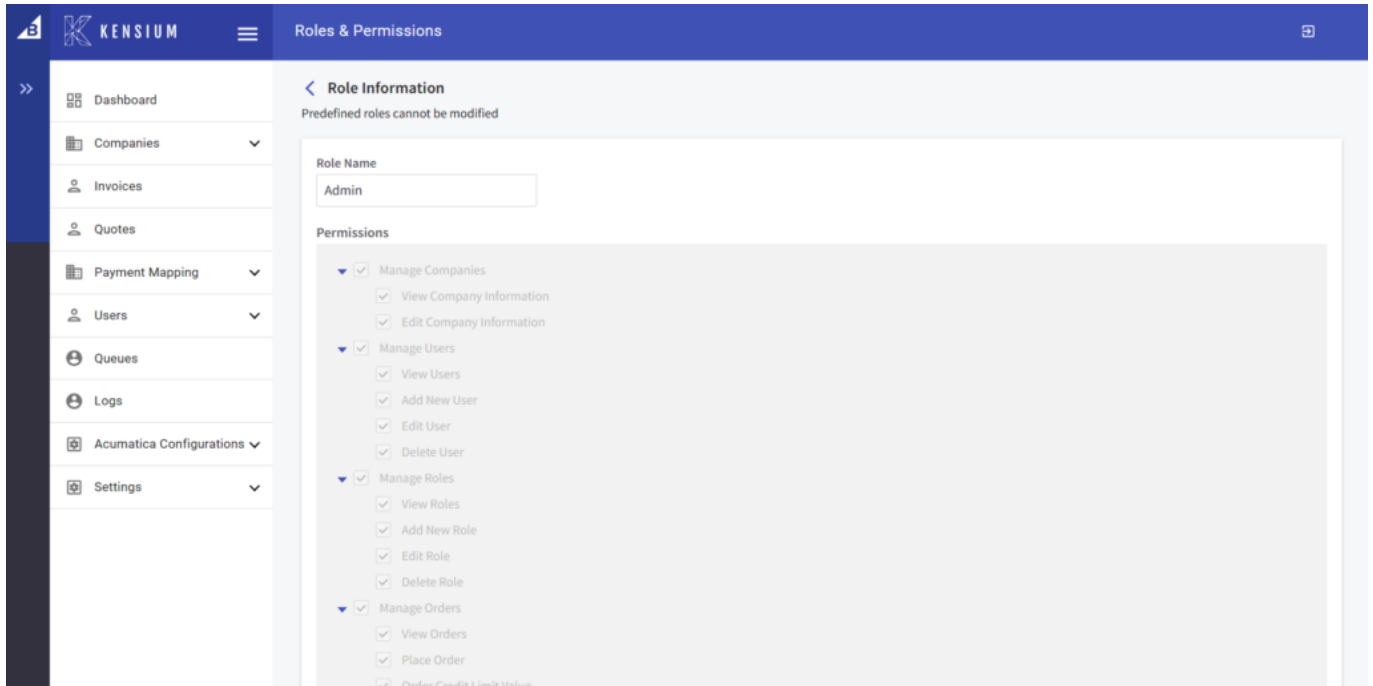
The user role is a Predefined role.



The screenshot displays the 'Company Detail' page for 'John Kenny' (status: APPROVED). The 'User Roles' tab is selected, showing a table of roles. The table has columns for 'Role Name', 'Type', and 'Action'. A single role is listed: 'Admin' with a 'Predefined' type. The interface includes a sidebar with navigation options like Dashboard, Companies, Invoices, Quotes, Payment Mapping, Users, Queues, Logs, Acumatica Configurations, and Settings. At the top of the main content area, there are buttons for 'Refresh', 'Add', and a search bar labeled 'Search company roles'.

Role Name	Type	Action
Admin	Predefined	...

The User Role is pre-defined.



The screenshot displays the 'Roles & Permissions' section of the Kensium application. On the left is a sidebar menu with options: Dashboard, Companies, Invoices, Quotes, Payment Mapping, Users, Queues, Logs, Acumatica Configurations, and Settings. The main content area is titled 'Role Information' and includes a note: 'Predefined roles cannot be modified'. Below this, the 'Role Name' is set to 'Admin'. The 'Permissions' section lists several categories with checkboxes for enabling or disabling specific actions:

- ☒ Manage Companies
 - ☒ View Company Information
 - ☒ Edit Company Information
- ☒ Manage Users
 - ☒ View Users
 - ☒ Add New User
 - ☒ Edit User
 - ☒ Delete User
- ☒ Manage Roles
 - ☒ View Roles
 - ☒ Add New Role
 - ☒ Edit Role
 - ☒ Delete Role
- ☒ Manage Orders
 - ☒ View Orders
 - ☒ Place Order
 - ☒ Define Freight Limit Value

View Option in Predefined Role Information.