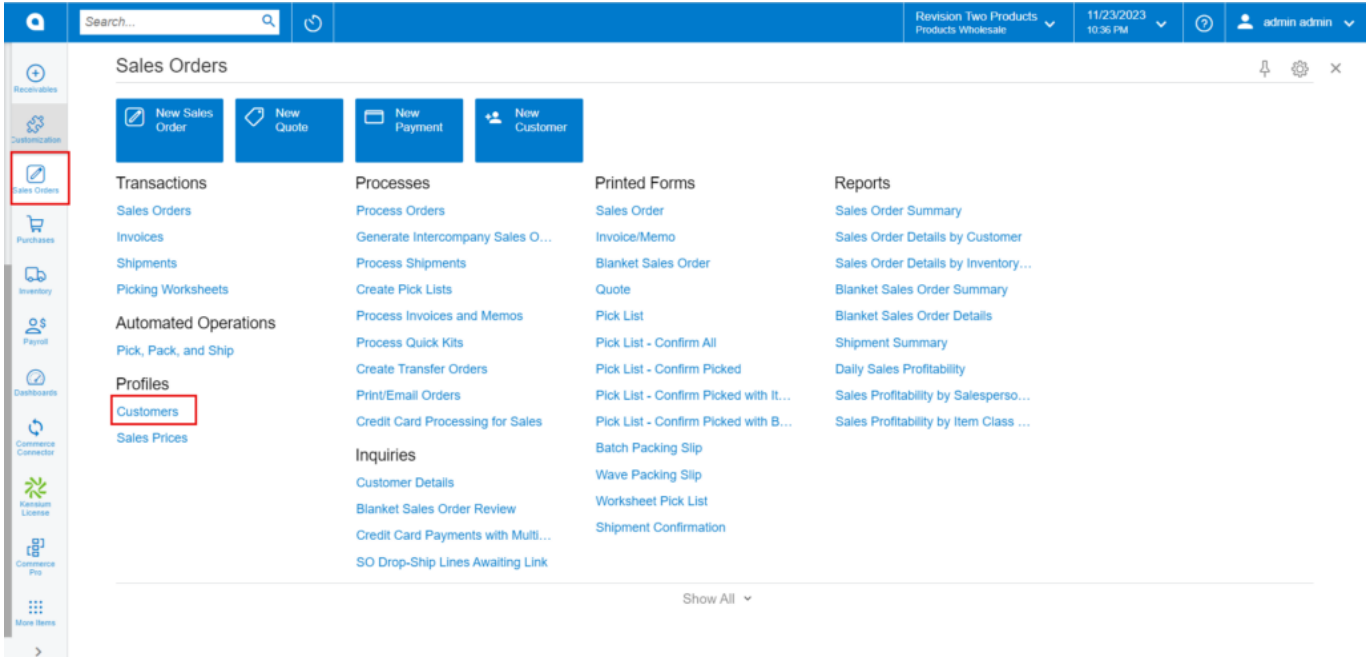


Customer

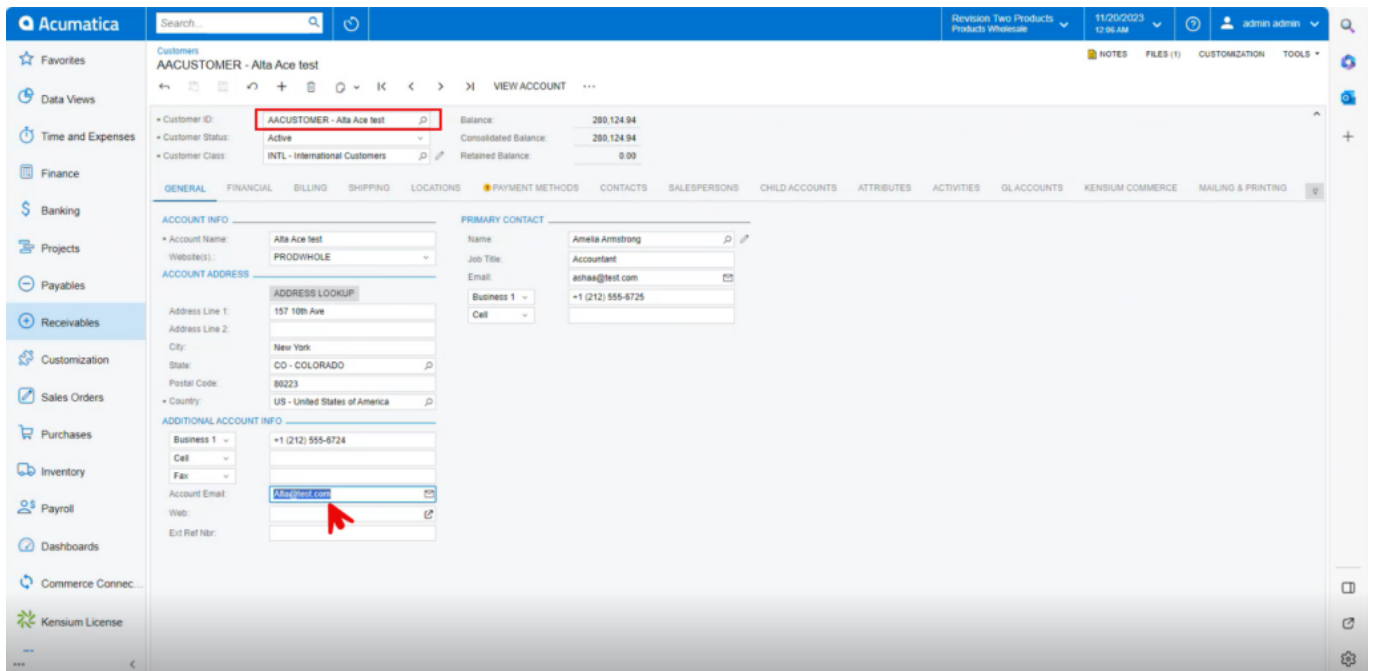
- ✘ You need to create a **[Customer ID]** in **[Customers]** under **[Profiles]** in **[Sales Orders]**.



The screenshot shows the 'Sales Orders' dashboard in Kensium CommercePro. The top navigation bar includes a search field, a refresh icon, and system information like 'Revision Two Products', 'Products Wholesale', and the date '11/23/2023 10:36 PM'. The user is logged in as 'admin admin'. The main content area is titled 'Sales Orders' and features four primary action buttons: 'New Sales Order', 'New Quote', 'New Payment', and 'New Customer'. Below these are five columns of options: Transactions, Processes, Printed Forms, and Reports. The 'Profiles' section is expanded, and 'Customers' is highlighted with a red box. A 'Show All' dropdown is visible at the bottom of the main content area.

Customers

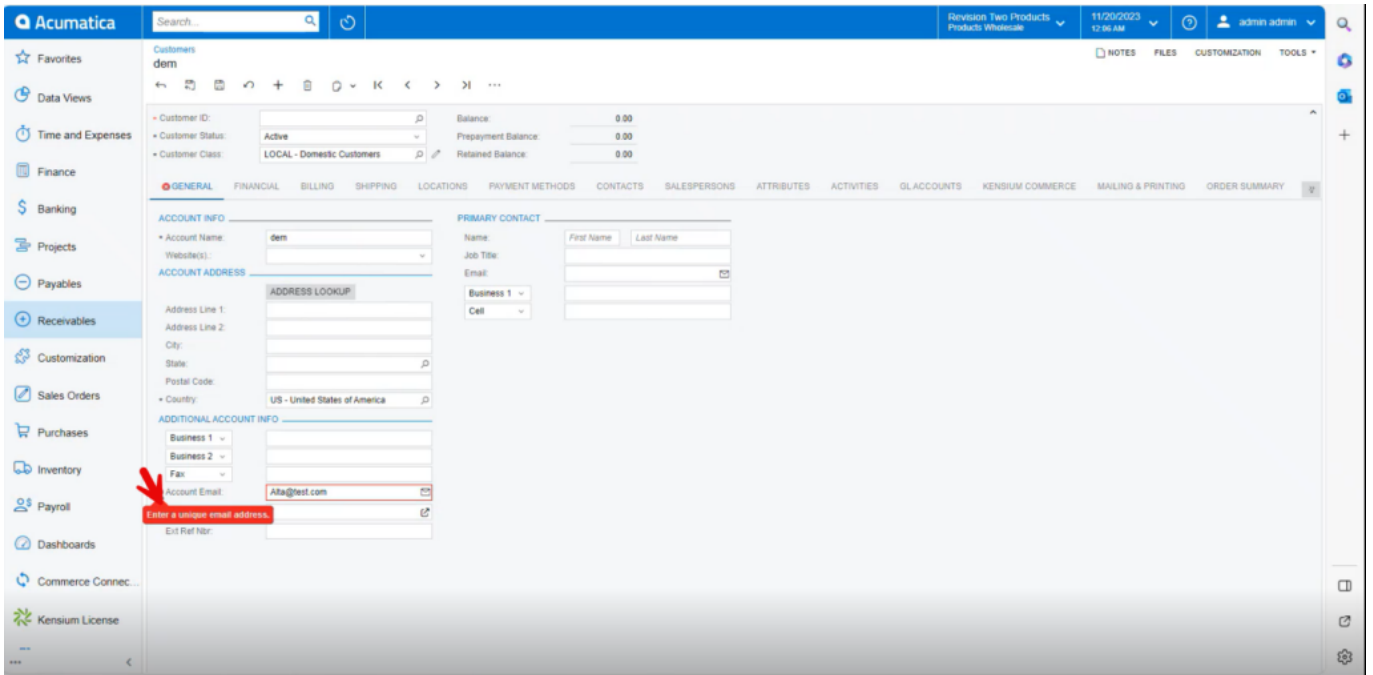
- You need to create a **[Customer ID]**.
- Select the **[Customer Status]** from the drop-down.
- Search for **[Customer Class]**.
- Enter the **[Account Email]**.



The screenshot displays the Acumatica software interface for a customer record. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision: Two Products, Products: Wholesale, Date: 11/20/2023 12:56 AM, User: admin admin). The left sidebar contains various navigation options such as Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Payroll, Dashboards, and Commerce Connect. The main content area shows the customer details for 'AACUSTOMER - Alta Ace test'. The 'Customer ID' field is highlighted with a red box. The 'Account Email' field contains the text 'Admin@test.com', which is highlighted in blue and has a red arrow pointing to it. The interface also displays financial information (Balance: 289,124.94, Consolidated Balance: 289,124.94, Retained Balance: 0.00) and contact information (Name: Amelia Armstrong, Job Title: Accountant, Email: amhaa@test.com, Business 1: +1 (212) 555-8725).

Customers (1)

- When you create a new customer and use their existing email address, an error notice appears under Account Email as **{Enter a Unique email Address}**.



Acumatica Search... Revision Two Products Products Wholesale 11/20/2023 12:56 AM admin admin

Customers
dem

Customer ID: DEM Balance: 0.00
Customer Status: Active Prepayment Balance: 0.00
Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES GLACCOUNTS KENSIUM COMMERCE MAILING & PRINTING ORDER SUMMARY

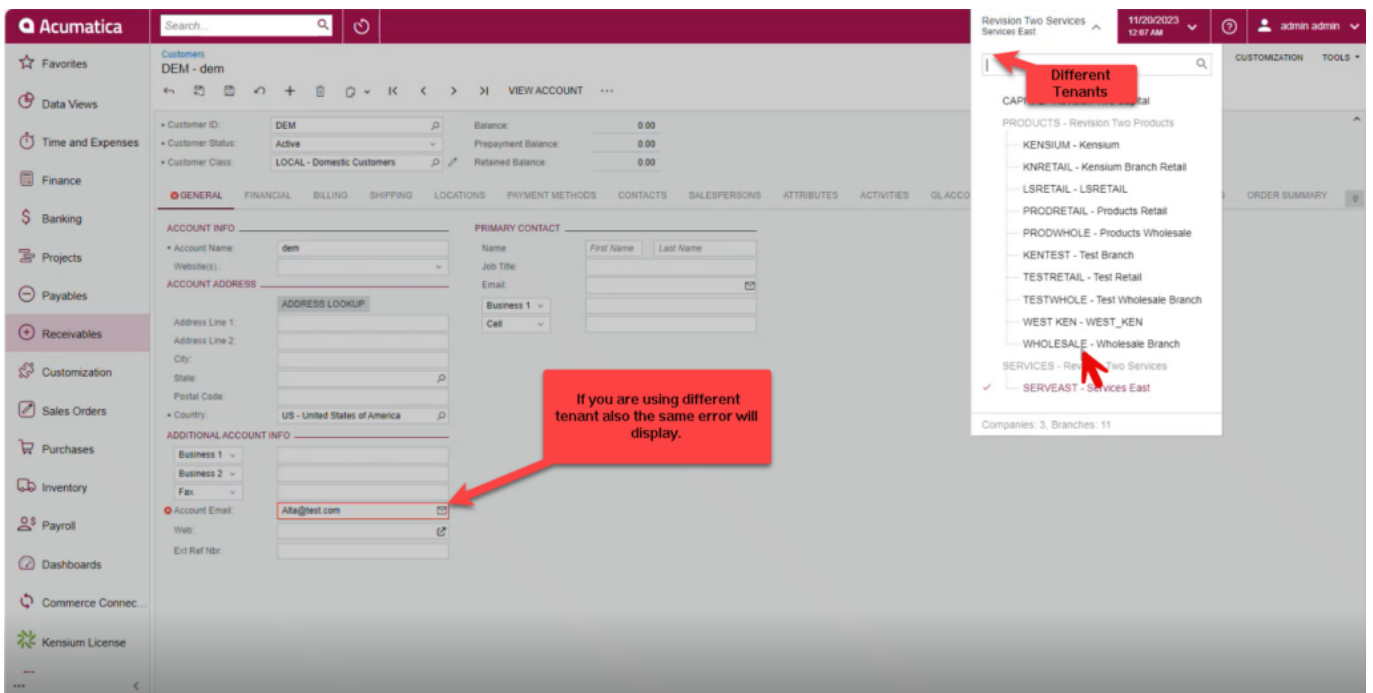
ACCOUNT INFO
Account Name: dem
Website(s):
ACCOUNT ADDRESS
Address Line 1:
Address Line 2:
City:
State:
Postal Code:
Country: US - United States of America

ADDITIONAL ACCOUNT INFO
Business 1:
Business 2:
Fax:
Account Email: Ata@test.com
Web:
Ext Ref Nbr:

PRIMARY CONTACT
Name: First Name Last Name
Job Title:
Email:
Business 1:
Cell:

Enter a unique email address.

New Customer



Acumatica Search... Revision Two Services Services East 11/20/2023 12:67 AM admin admin

Customers
DEM - dem

Customer ID: DEM Balance: 0.00
Customer Status: Active Prepayment Balance: 0.00
Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES GLACCOUNTS

ACCOUNT INFO
Account Name: dem
Website(s):
ACCOUNT ADDRESS
Address Line 1:
Address Line 2:
City:
State:
Postal Code:
Country: US - United States of America

ADDITIONAL ACCOUNT INFO
Business 1:
Business 2:
Fax:
Account Email: Ata@test.com
Web:
Ext Ref Nbr:

PRIMARY CONTACT
Name: First Name Last Name
Job Title:
Email:
Business 1:
Cell:

Search Results:
Different Tenants
KAP...
PRODUCTS - Revision Two Products
KENSIMUM - Kensium
KNRETAIL - Kensium Branch Retail
LSRETAIL - LSRETAIL
PROORETAIL - Products Retail
PROOWHOLE - Products Wholesale
KENTEST - Test Branch
TESTRETAIL - Test Retail
TESTWHOLE - Test Wholesale Branch
WEST KEN - WEST_KEN
WHOLESALE - Wholesale Branch
SERVICES - Revision Two Services
SERVEAST - Services East

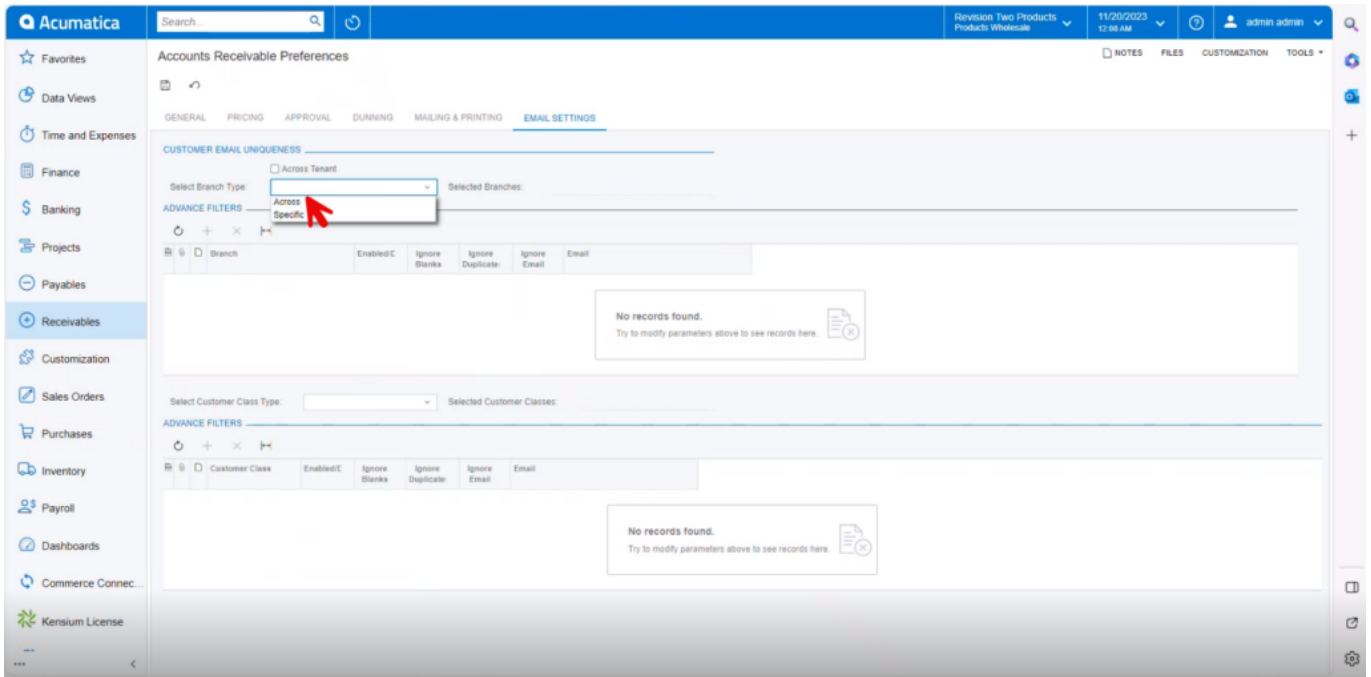
Companies: 3, Branches: 11

If you are using different tenant also the same error will display.

Different Tenant

If you display the radio button for **[ACTIVE TENANT]** a line with **[Select Branch Type]** and **[Selected Branches]** will display.

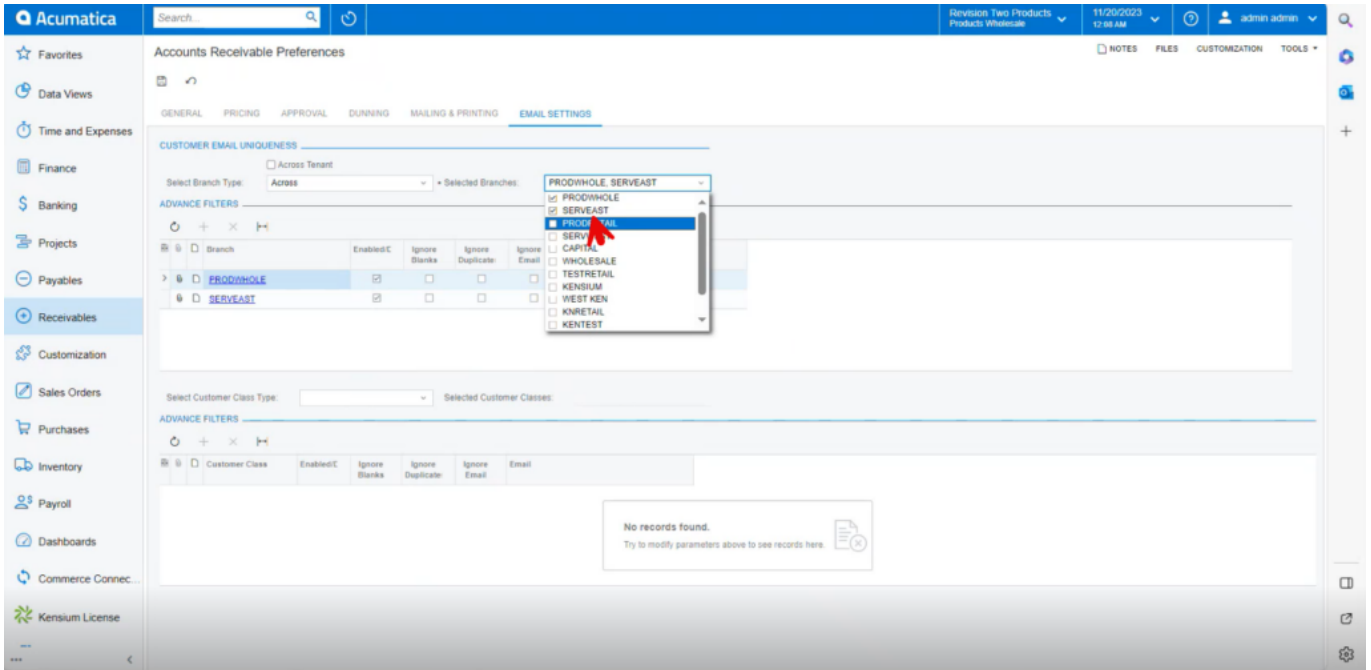
- Select the **[Branch Type]** from the drop-down menu as **[Across]**.



The screenshot shows the Acumatica Accounts Receivable Preferences page, specifically the EMAIL SETTINGS tab. The page is titled "Accounts Receivable Preferences" and has a search bar at the top. The left sidebar contains various navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Payroll, Dashboards, Commerce Connect, and Kensium License. The main content area is divided into sections: "CUSTOMER EMAIL UNIQUENESS" and "ADVANCE FILTERS". In the "CUSTOMER EMAIL UNIQUENESS" section, there is a radio button for "Across Tenant" and a "Select Branch Type" dropdown menu. The dropdown menu is open, showing "Across" and "Specific" options, with a red arrow pointing to "Across". Below this, there is a "Selected Branches" field. The "ADVANCE FILTERS" section has a table with columns for "Branch", "Enabled", "Ignore Blanks", "Ignore Duplicate", "Ignore Email", and "Email". The table is currently empty, displaying a "No records found" message. The top right of the page shows the user's name "admin admin" and the date "11/20/2023 12:02 AM".

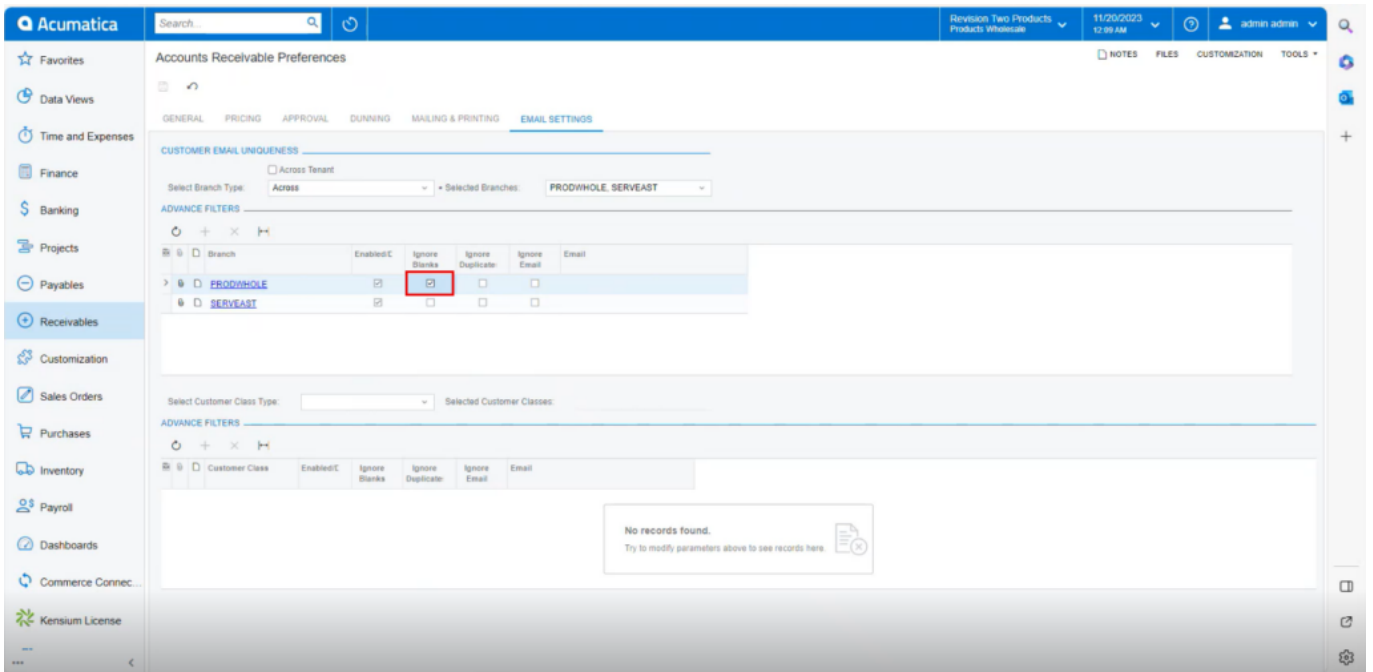
Branch Type

- Select the **[Branches]** from the Selected Branches menu.



Selected Branches

- The selected branches will be displayed under Advance Features.
- Enable the radio button for **[Ignore Blanks]** for **[PRODWHOLE]**.



Acumatica

Accounts Receivable Preferences

GENERAL PRICING APPROVAL DUNNING MAILING & PRINTING **EMAIL SETTINGS**

CUSTOMER EMAIL UNIQUENESS

Select Branch Type: Across Tenant
Select Branch Type: Across Selected Branches: PRODWHOLE, SERVEAST

ADVANCE FILTERS

Branch	Enabled	Ignore Blanks	Ignore Duplicate	Ignore Email	Email
PRODWHOLE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SERVEAST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select Customer Class Type: Selected Customer Classes:

ADVANCE FILTERS

Customer Class	Enabled	Ignore Blanks	Ignore Duplicate	Ignore Email	Email
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No records found.
Try to modify parameters above to see records here.

Accounts Receivable Preferences