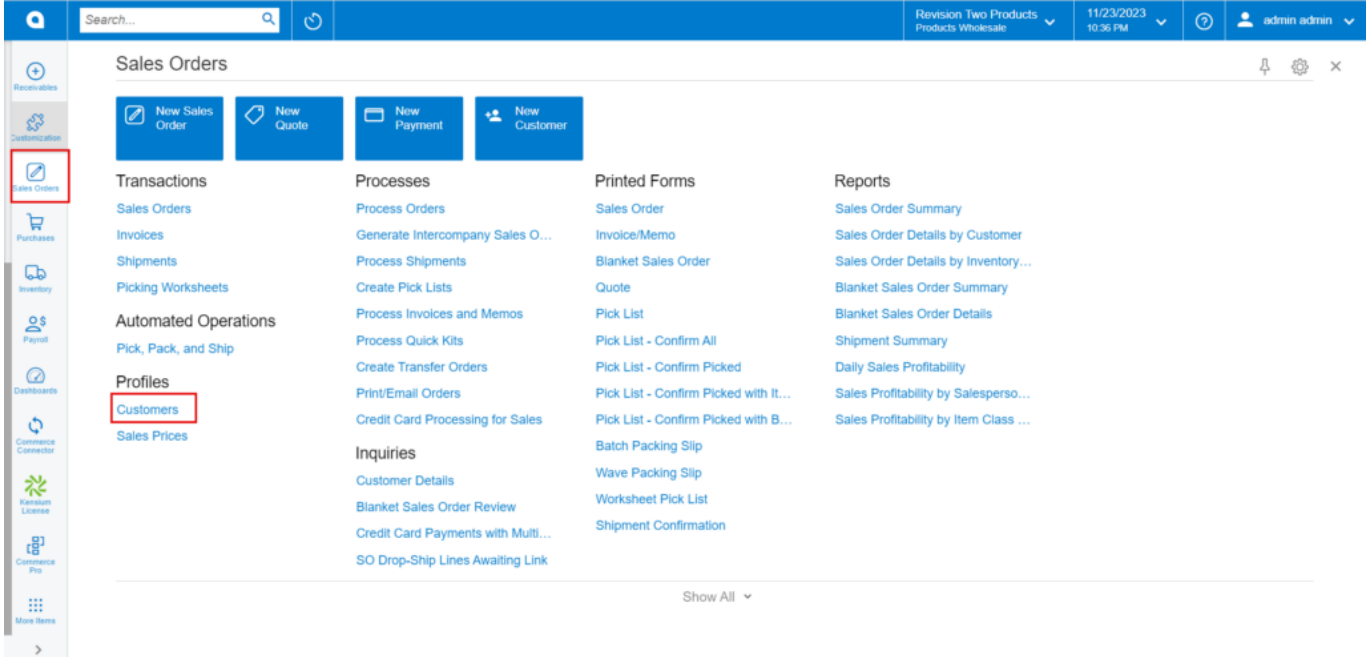


# Customer

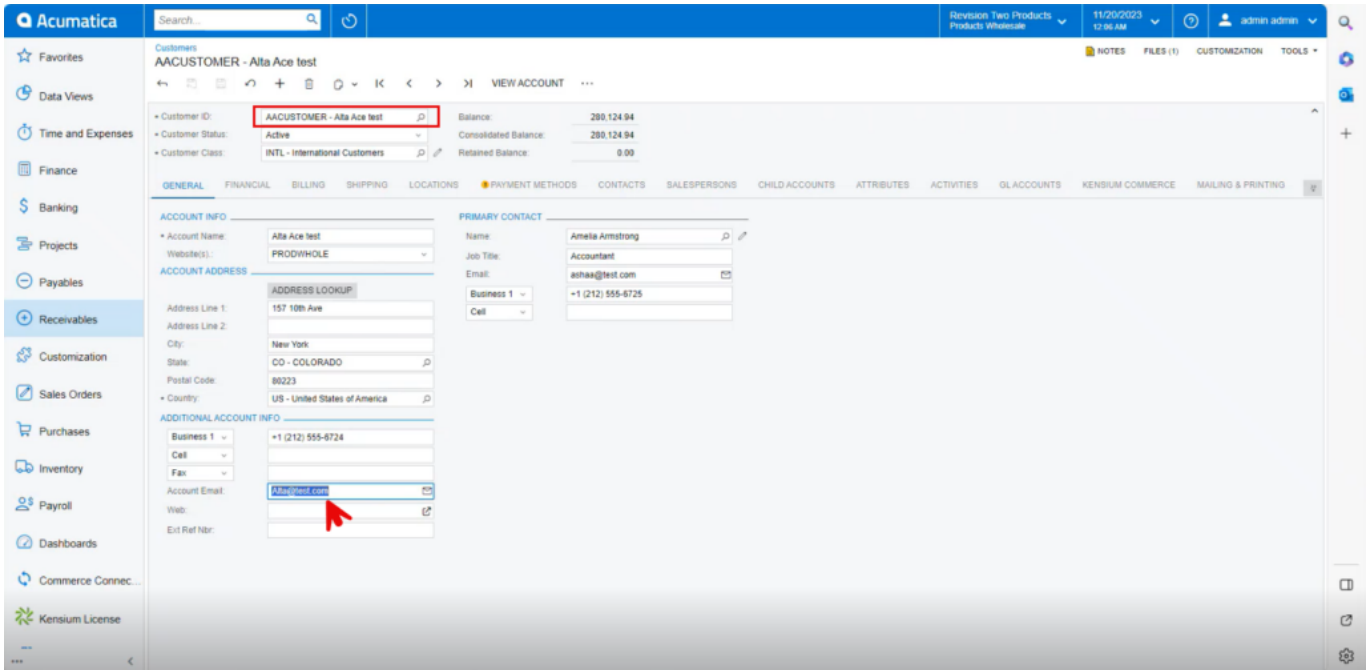
- ✘ You need to create a **[Customer ID]** in **[Customers]** under **[Profiles]** in **[Sales Orders]**.



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

## Customers

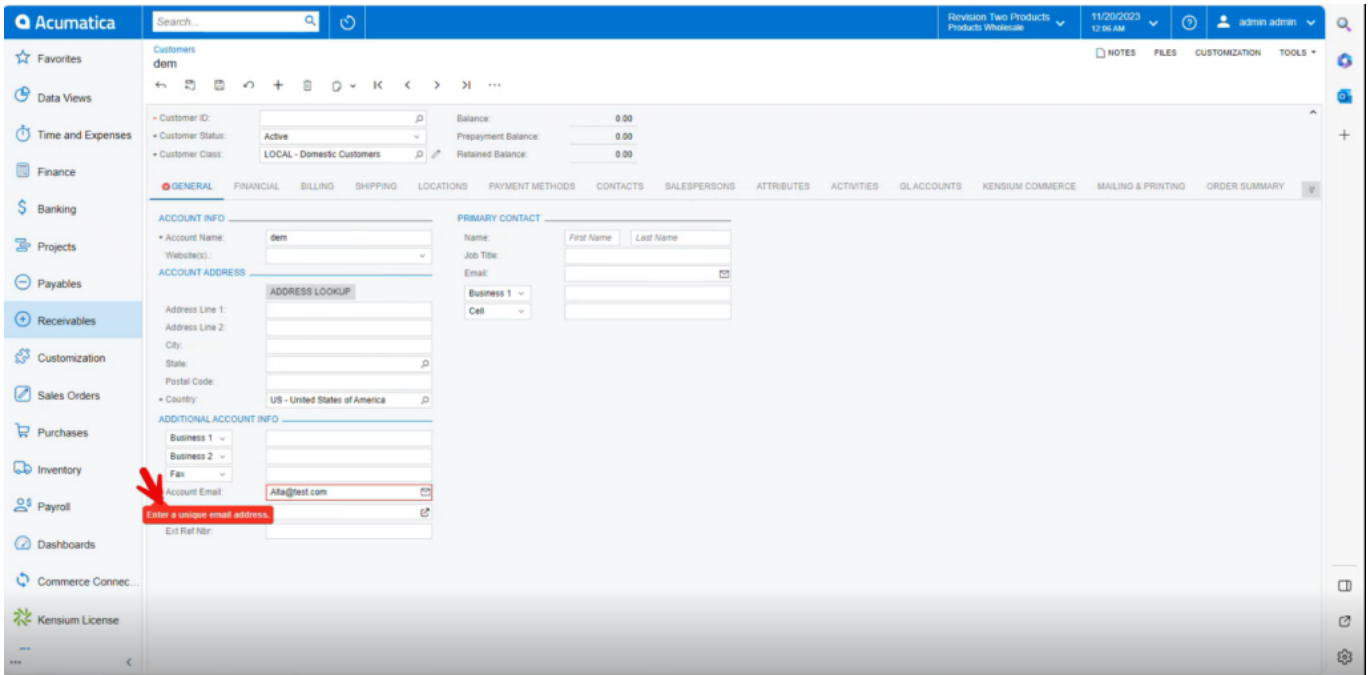
- You need to create a **[Customer ID]**.
- Select the **[Customer Status]** from the drop-down.
- Search for **[Customer Class]**.
- Enter the **[Account Email]**.



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 12:00 AM, User: admin admin). The left sidebar lists various modules 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

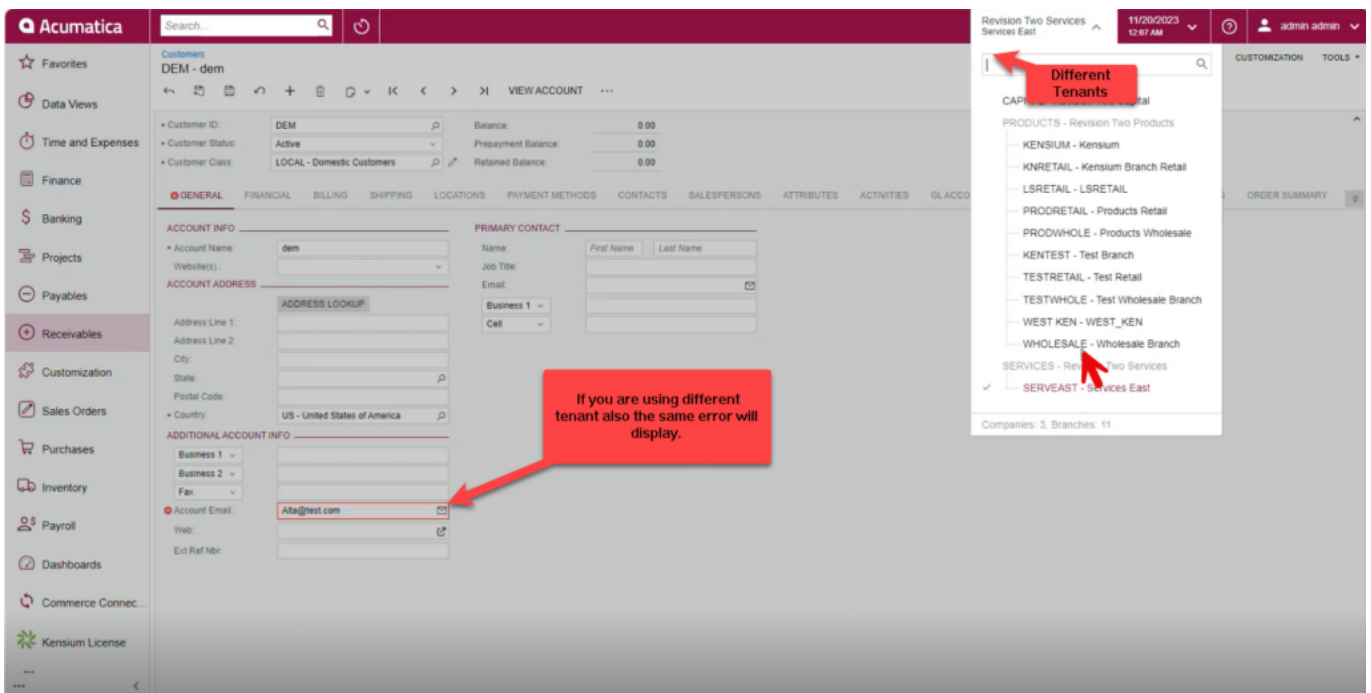
ACCOUNT INFO  
Account Name: dem  
WebSite(s):  
ACCOUNT ADDRESS  
ADDRESS LOOKUP  
Address Line 1:  
Address Line 2:  
City:  
State:  
Postal Code:  
Country: US - United States of America

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 LOOKUP  
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:

Different Tenants

- KENSIUM - 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**

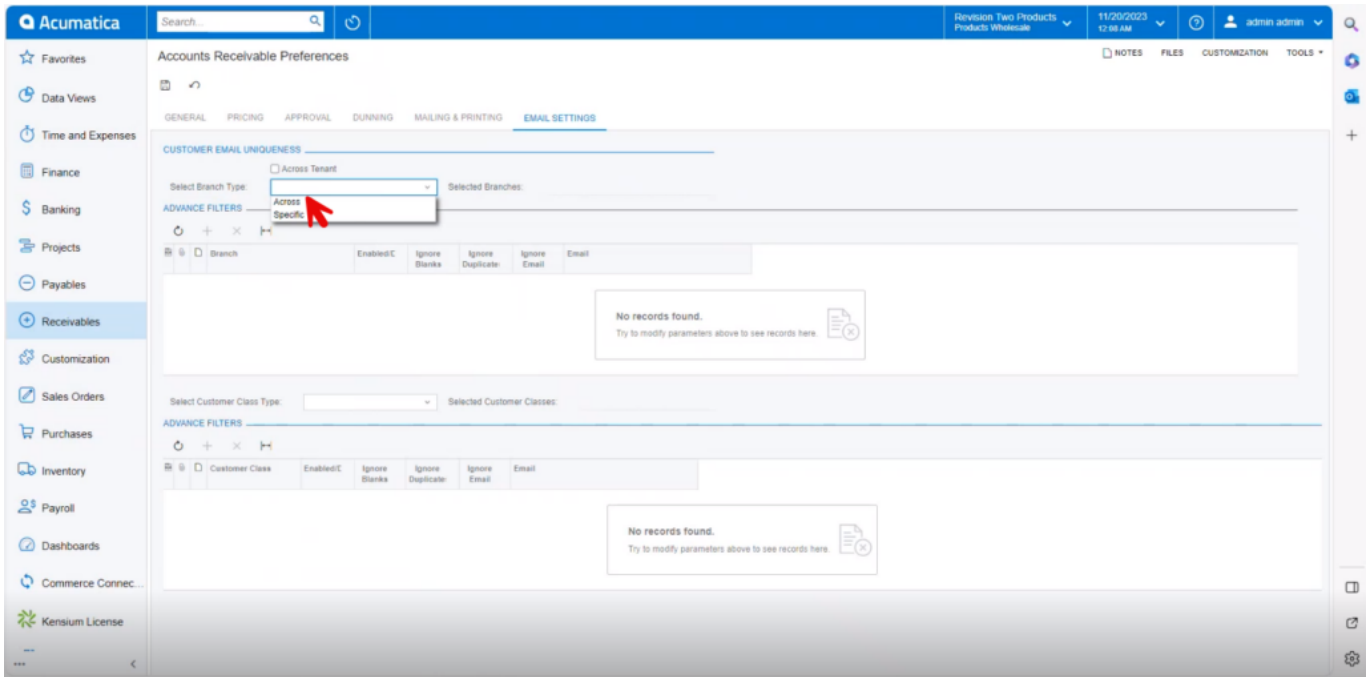
Companies: 3, Branches: 11

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]**.



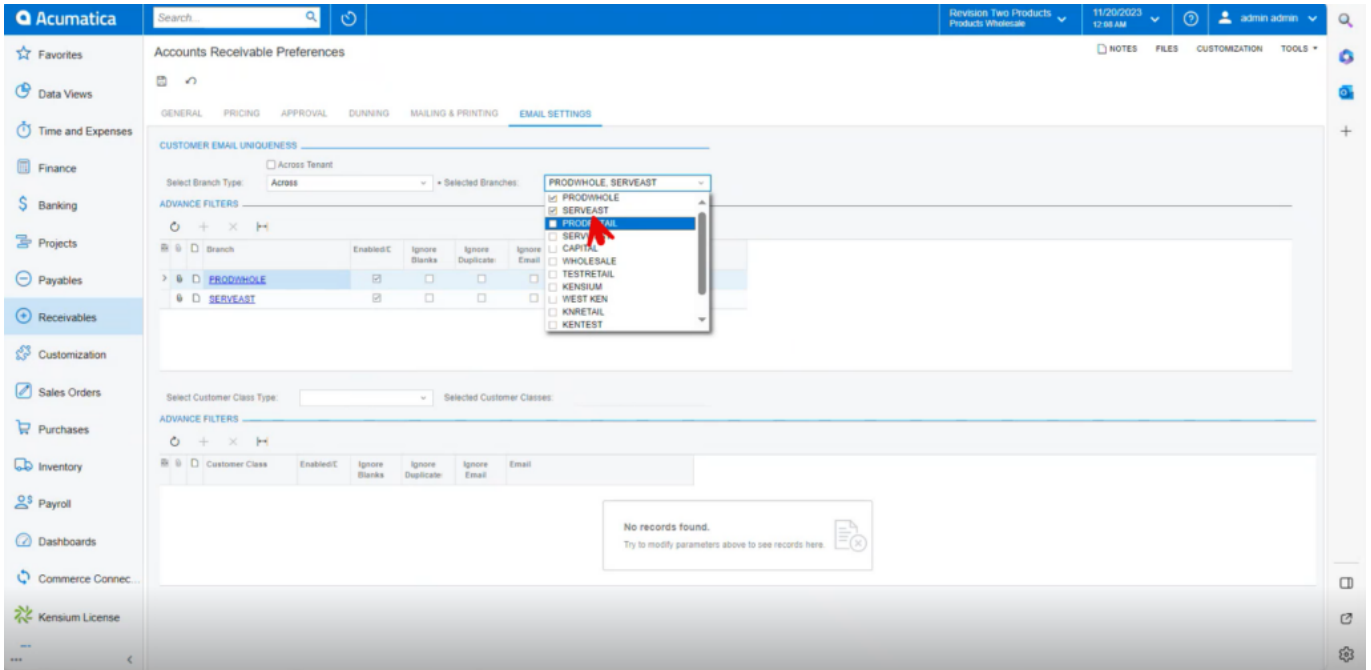
The screenshot shows the Acumatica Accounts Receivable Preferences page, specifically the EMAIL SETTINGS tab. The page is titled "Accounts Receivable Preferences" and has a navigation bar with tabs: GENERAL, PRICING, APPROVAL, DUNNING, MAILING & PRINTING, and EMAIL SETTINGS. The main content area is divided into two 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. A red arrow points to the "Across" option. Below the dropdown is a "Selected Branches" field. Below this is a table with columns: Branch, Enabled, Ignore Blanks, Ignore Duplicate, Ignore Email, and Email. The table is empty, and a message box says "No records found. Try to modify parameters above to see records here."

In the "ADVANCE FILTERS" section, there is a "Select Customer Class Type" dropdown menu and a "Selected Customer Classes" field. Below this is another table with columns: Customer Class, Enabled, Ignore Blanks, Ignore Duplicate, Ignore Email, and Email. This table is also empty, with a message box saying "No records found. Try to modify parameters above to see records here."

## 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

Revision Two Products  
Products Wholesale

11/20/2023  
12:59 AM

admin admin

NOTES FILES CUSTOMIZATION TOOLS

### Accounts Receivable Preferences

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

Across Tenant

Select Branch Type: Across Selected Branches: PRODWHOLE, SERVEAST

**CUSTOMER EMAIL UNIQUENESS**

ADVANCE FILTERS

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

No records found.  
Try to modify parameters above to see records here.

### Accounts Receivable Preferences