

Identifying a Staff Admin

to locate the Staff Admin within the Customers screen, click on the **[Edit]** link under the **[Action]** column within the grid where the POS Group is set as **[POS Staff]**.

Cus	ton	ners								Ŧ	pos
										Add New C	usto
MAIL	1			Q				T Filters	• Default Vie	zw 🔹 🏠 Columns 🔹	± 8
Active fr	iters:	Keyword: MAILI 🔕									(
Actio	ns	•	43 records fo	ound					20 • pe	er page < 1	of 3
	ID	Name	POS Status	Email	Group †	Phone	ZIP	Country	State/Province	Customer Since	
	34	Jake k	Enable	jake@mailinator.com	POS Staff		60654	United States	Illinois	Jan 18, 2024 3:44:31 AM	
	39	Merina Kensium	Enable	merinak@mailinator.com	POS Staff					Jan 25, 2024 5:41:41 AM	
	54	Roslin Mary	Enable	roslin@mailinator.com	POS Staff		89101	United States	Nevada	May 16, 2024 6:09:30 AM	
	57	Annie K	Enable	annie@mailinator.com	POS Staff		89101	United States	Nevada	Jul 16, 2024 5:57:14 AM	
	1	John Doe	Disable	johndoe@mailinator.com	General					Jan 16, 2024 11:48:06 AM	
	2	Guest Guest	Disable	johndoe.guest.1@mailinator.com	General					Jan 16, 2024 11:48:07 AM	
	4	Guest Guest	Disable	rahulg.guest.3@mailinator.com	General		89101	United States	Nevada	Jan 17, 2024 6:13:54 AM	
	6	Guest Guest	Disable	mike.gill.guest.5@mailinator.com	General					Jan 17, 2024 6:16:45 AM	
	1.0				Contract			Lipited States	Man Mark	Ine 17 2024 6:10:22 AM	



- After selecting the Edit button, you will be taken to the following screen, where you can navigate to the **[Account Information]** section.
- In the Account Information section, you will notice that the **[Roles]** and **[Group]** fields are greyed out or in read-only mode. However, the remaining fields are not disabled.



65	K E N S I U M
	OrderPad

CB								
	← Back De	lete Customer R	Reset Create Order	Reset Password	Force Sign-In	Save and Continue Edit	Save Customer	Sync Customer
DASHBOARD								
	CUSTOMER INFORMATION	Acc	ount Information					
\$ SALES	Customer View		Pos Staff Statu	s 💽 Yes				
CATALOG	Account Information		Role	s Admin	*			
CONNECTOR	Addresses		Associate to Location	n Las Vegas			×	
CUSTOMERS	Orders		Associate to Guest Custome	r Guest Guest			•	
	Newsletter		Associate to Website	e * Main Website	• •			
.1	Billing Agreements							
	Wish List		Grouț	 POS Staff Disable Automa 	tic Group Change Base	d on VAT ID		
STORES				[
*			Name Prefix	ĸ				
STSTEM			First Name	2 *				
				Γ				

Roles & Group are read-only mode

• The Acumatica Customer ID refers to the Customer ID synced from OrderPad Admin to Acumatica.

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DASHBOARD		Dack	Delete customer	Reset	create order	Reset rassword	Torce Sign-in	Save and continue Ear	Save customer	Sync customer
e.					Name Suffix					
POS					Email *	rahulg@mailnator.com				
\$ SALES				Allow remote s	hopping assistance	No				
CATALOG					Date of Birth	1000 (100				
CRDERPAD A-M CONNECTOR					Mobile					
					Tax/VAT Number					
					Gender	Male 🔻				
REPORTS				Send W	elcome Email From	OrderPad 🔻				
STORES				Acu	matica customer id	E00000004				
SYSTEM										
					Pr	ivacy Policy Report an Iss	ue			





Acumatica Customer ID in the Staff Admin section

The next section outlines how this Staff Admin is represented in Acumatica.

- Generate a customer using the Acumatica Customer ID obtained from Magento.
- When you create the customer with the code in the Receivable Section of Acumatica, the records will automatically populate in the Customer Screen.
- Below the Customer Class is a check box or flag **[Is Staff Customer]** which will be checked and set in read-only mode. This allows you to distinguish between a regular customer and a staff user in Acumatica.
- In Acumatica, there is a single repository for storing Customer and Customer-related information. Staff Admin and POS staff, categorized as Customers, can be distinguished using a specific flag.

Q Acumatica	Search Q	Revision Two Products Products Wholesale 12/18/2024 7.09 PM ⑦ 2 admin admin ~
Favorites	Customers E000000001 - Layla Parimala	C NOTES FILES CUSTOMIZATION TOOLS -
🕒 Data Views	S □ ∽ + □ □ ~ K < > >I VIEWACCOUNT ···	
Time and Expenses	Customer ID: E00000001 - Layla Parimala Balance: 0.00 Customer Status: Active Prepayment Balance: 0.00 Customer Class: POSSTAFE_POSSTAFE_PO Retained Balance: 0.00	D MAGENTO REFERENCES ^
Finance	IsB2B	
\$ Banking	GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS	S SALESPERSONS ATTRIBUTES ACTIVITIES GLACCOUNTS 2
Payables	ACCOUNT INFO PRIMARY CONTACT	
+ Receivables	Account Name: Layla Parimala Name: First Name AccOUNT ADDRESS Job Title:	Last Name
Sales Orders	Address Line 1: Email: Address Line 2: Cell	
Purchases	City State: p	
Do Inventory	Postal Code: Country: US - United States of America	
••• <	ADDITIONAL ACCOUNT INFO	
		ACTIVATE

Staff as Customer in Acumatica

