



KENSIUM

OrderPad

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]**.

ID	Name	POS Status	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Action
34	Jake K	Enable	jake@mailinator.com	POS Staff		60654	United States	Illinois	Jan 18, 2024 3:44:31 AM	Edit
39	Merina Kensium	Enable	merinak@mailinator.com	POS Staff					Jan 25, 2024 5:41:41 AM	Edit
54	Roslin Mary	Enable	roslin@mailinator.com	POS Staff		89101	United States	Nevada	May 16, 2024 6:09:30 AM	Edit
57	Annie K	Enable	annie@mailinator.com	POS Staff		89101	United States	Nevada	Jul 16, 2024 5:57:14 AM	Edit
1	John Doe	Disable	johndoe@mailinator.com	General					Jan 16, 2024 11:48:06 AM	Edit
2	Guest Guest	Disable	johndoe.guest.1@mailinator.com	General					Jan 16, 2024 11:48:07 AM	Edit
4	Guest Guest	Disable	rahulg.guest.3@mailinator.com	General		89101	United States	Nevada	Jan 17, 2024 6:13:54 AM	Edit
6	Guest Guest	Disable	mike.gill.guest.5@mailinator.com	General					Jan 17, 2024 6:16:45 AM	Edit
8	Guest Guest	Disable	matt.orav.guest.7@mailinator.com	General		87110	United States	New York	Jan 17, 2024 6:19:22 AM	Edit

Click on Edit

- 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.



← Back Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit Save Customer Sync Customer

CUSTOMER INFORMATION

Customer View

Account Information

Addresses

Orders

Newsletter

Billing Agreements

Wish List

Account Information

Pos Staff Status Yes

Roles Admin

Associate to Location Las Vegas

Associate to Guest Customer Guest Guest

Associate to Website * Main Website ?

Group * POS Staff

Disable Automatic Group Change Based on VAT ID

Name Prefix

First Name *

Roles & Group are read-only mode

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

Rahul Gedupudi

← Back Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit Save Customer Sync Customer

Name Suffix

Email * rahulg@mailinator.com

Allow remote shopping assistance No

Date of Birth

Mobile

Tax/VAT Number

Gender Male

Send Welcome Email From OrderPad

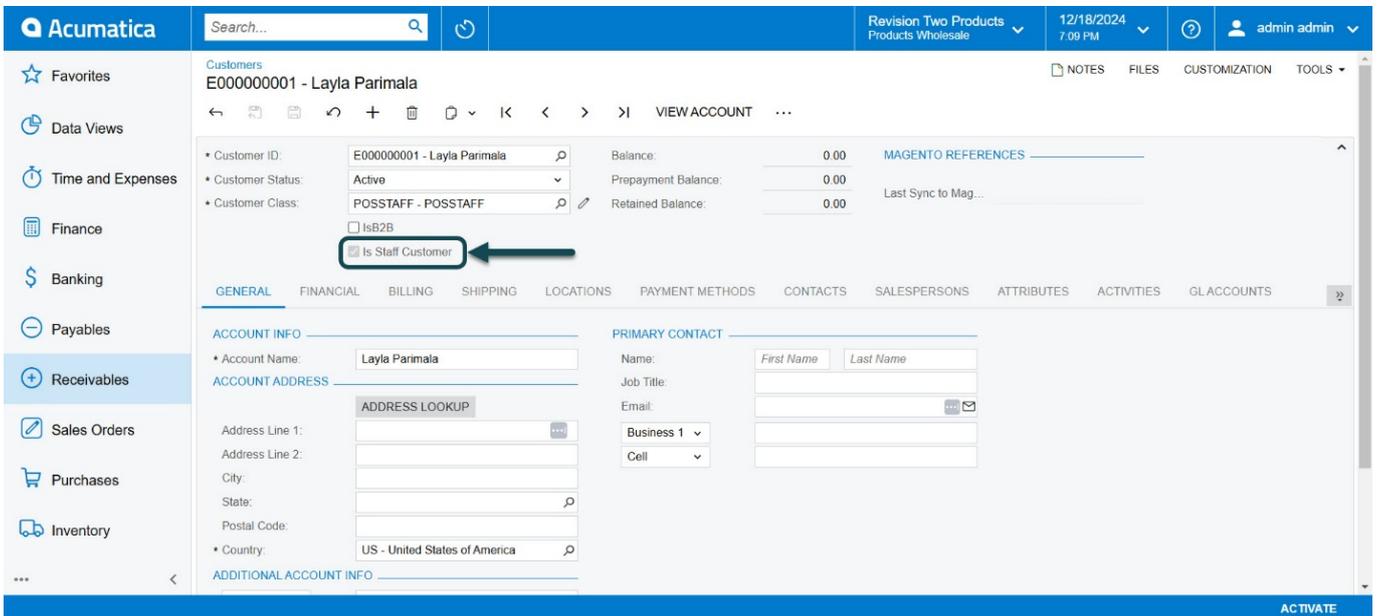
Acumatica customer id E000000004

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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.



The screenshot shows the Acumatica interface for a customer record. The customer ID is E000000001 - Layla Parimala. The customer status is Active, and the customer class is POSSTAFF - POSSTAFF. A checkbox labeled "Is Staff Customer" is checked and highlighted with a red box and an arrow. The interface also shows account information, primary contact details, and address lookup options.

Staff as Customer in Acumatica