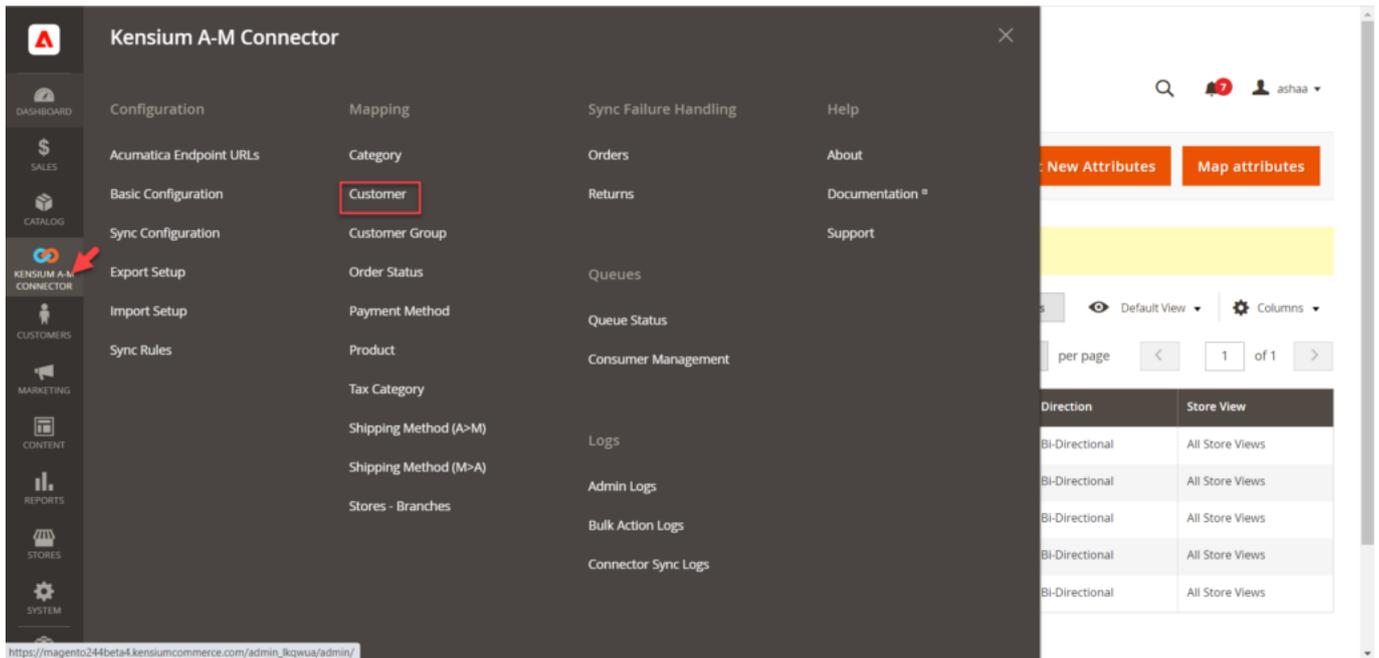


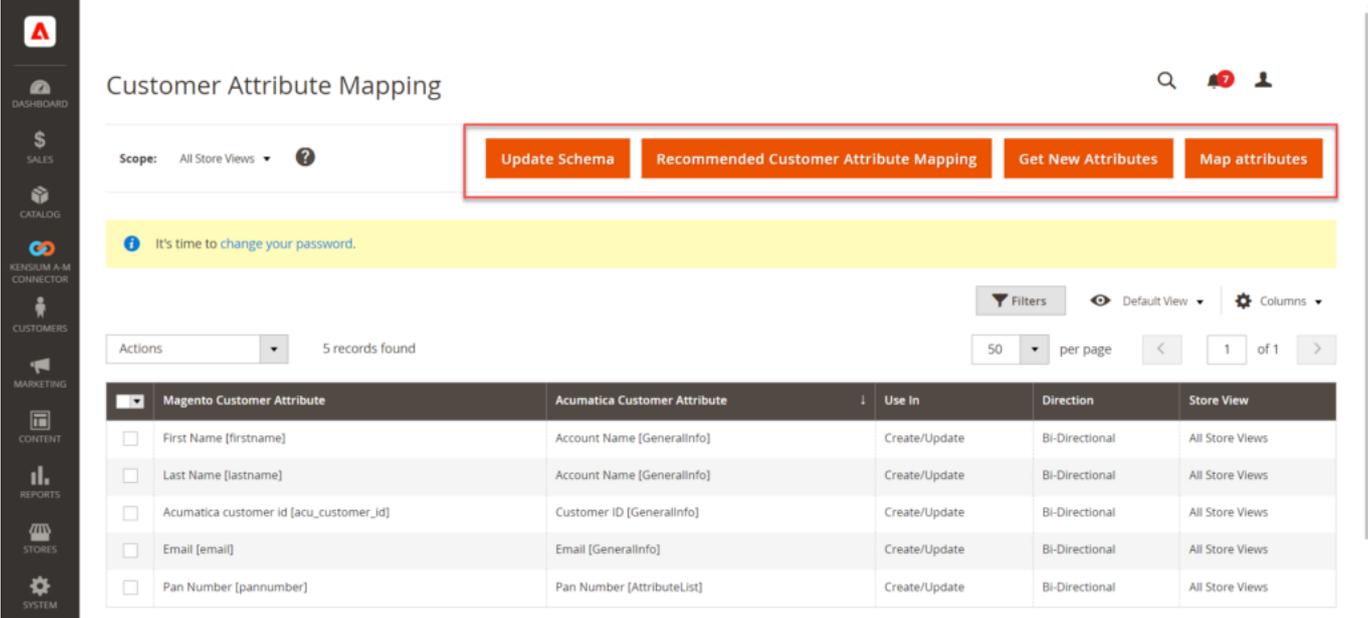
# Customer Mapping



Customer Mapping is followed by Category mapping in the Mapping section upon clicking on the **[Kensium A-M]** connector. Upon clicking the **[Customer]**, you will be redirected to the following screen.



Customer Mapping in the Mapping section



Customer Attribute Mapping

Scope: All Store Views

Update Schema Recommended Customer Attribute Mapping Get New Attributes Map attributes

It's time to change your password.

Filters Default View Columns

50 per page 1 of 1

<input type="checkbox"/>	Magento Customer Attribute	Acumatica Customer Attribute	Use In	Direction	Store View
<input type="checkbox"/>	First Name [firstname]	Account Name [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	Last Name [lastname]	Account Name [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	Acumatica customer id [acu_customer_id]	Customer ID [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	Email [email]	Email [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	Pan Number [pannumber]	Pan Number [AttributeList]	Create/Update	Bi-Directional	All Store Views

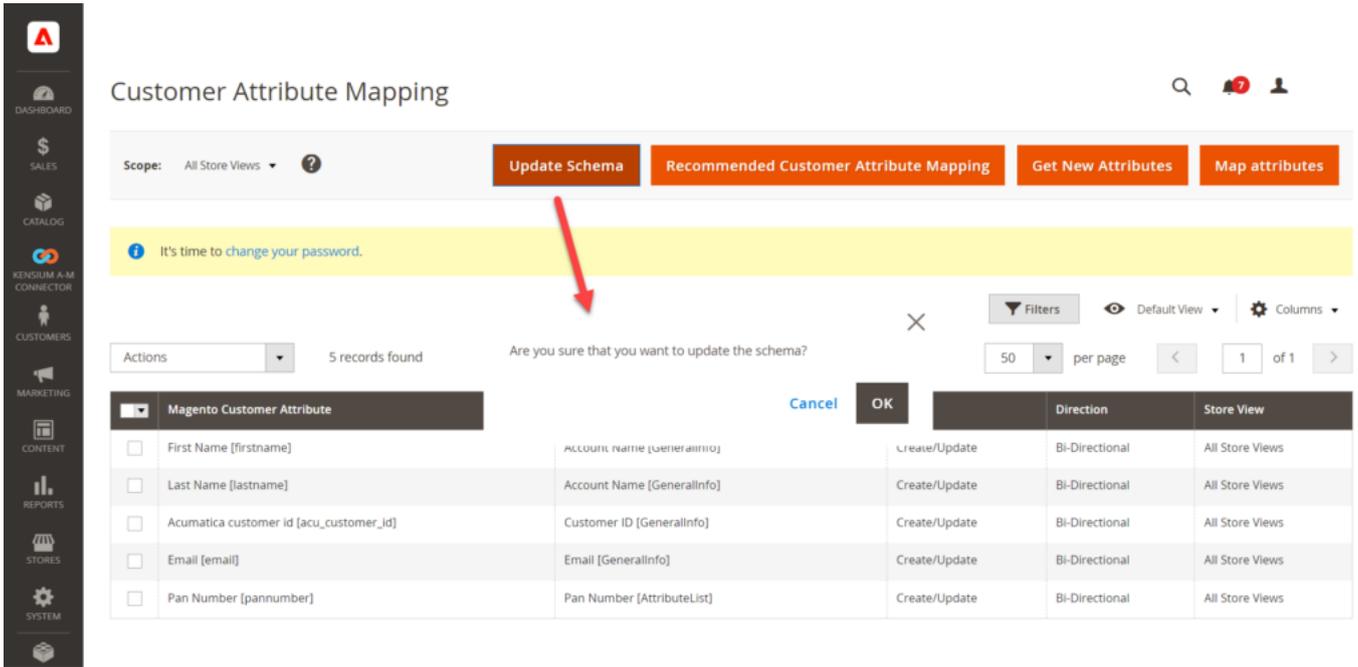
### Options available in the Customer Attribute Mapping

This includes the following options in the Customer Attribute Mapping screen.

- **Update Schema**
- **Recommended Customer Attribute Mapping**
- **Get New Attributes**
- **Map Attributes**

#### Update Schema:

The customer-selected fields in Acumatica will be synchronized within Magento once you click on [Update Schema]. Upon clicking on this a pop-up will appear and to update you need to click on [OK].



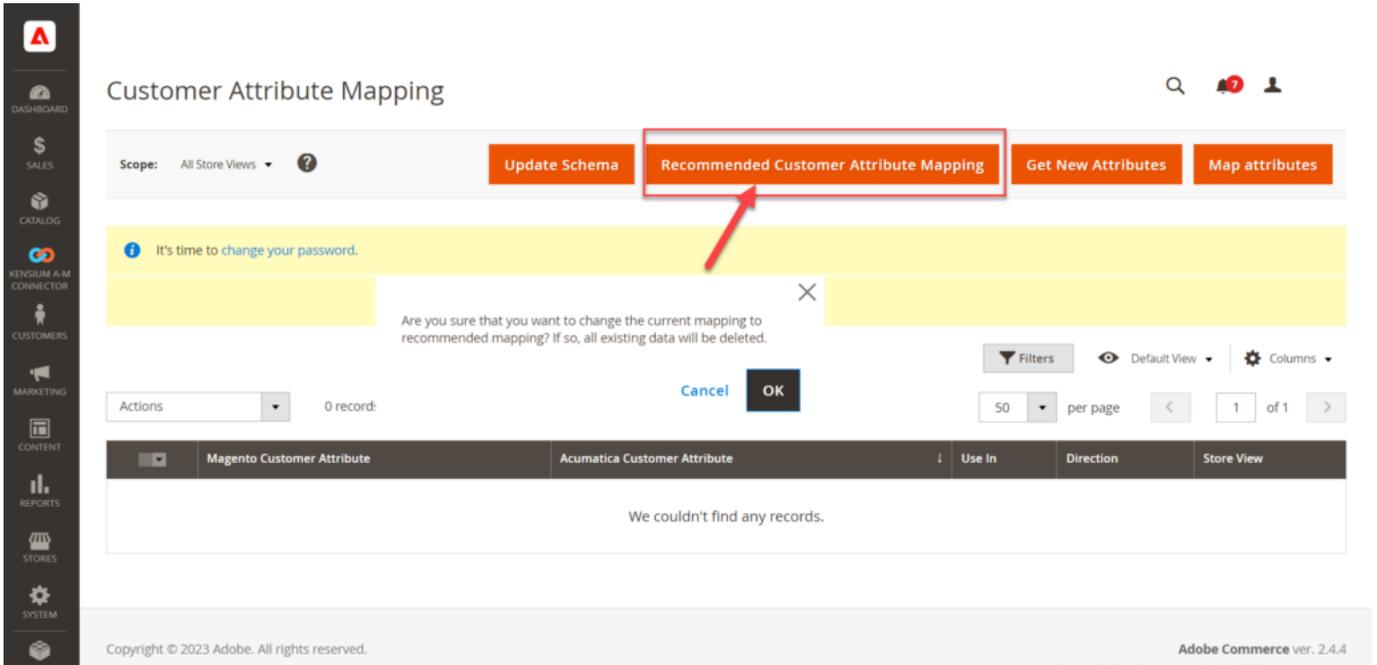
The screenshot shows the 'Customer Attribute Mapping' interface. At the top, there are navigation buttons: 'Update Schema', 'Recommended Customer Attribute Mapping', 'Get New Attributes', and 'Map attributes'. A red arrow points to the 'Update Schema' button. Below this, a yellow banner displays the message: 'It's time to change your password.' A confirmation dialog box is open, asking 'Are you sure that you want to update the schema?' with 'Cancel' and 'OK' buttons. The dialog is positioned over a table of 'Magento Customer Attribute' mappings.

	Direction	Store View
<input type="checkbox"/> First Name [firstname]	Bi-Directional	All Store Views
<input type="checkbox"/> Last Name [lastname]	Bi-Directional	All Store Views
<input type="checkbox"/> Acumatica customer id [acu_customer_id]	Bi-Directional	All Store Views
<input type="checkbox"/> Email [email]	Bi-Directional	All Store Views
<input type="checkbox"/> Pan Number [pannumber]	Bi-Directional	All Store Views

Confirmation message upon clicking [Update Schema]

- **Recommended Customer Attribute Mapping:**

In the first place, the customer attribute mapping browse will be blank on your screen. To bring the default customer attribute you need to click on the [Recommended Customer Attribute Mapping]. A confirmation message will appear on the screen. Click on **[OK]** and the default attributes will appear on the screen.



Customer Attribute Mapping

Scope: All Store Views

Update Schema Recommended Customer Attribute Mapping Get New Attributes Map attributes

It's time to change your password.

Are you sure that you want to change the current mapping to recommended mapping? If so, all existing data will be deleted.

Cancel OK

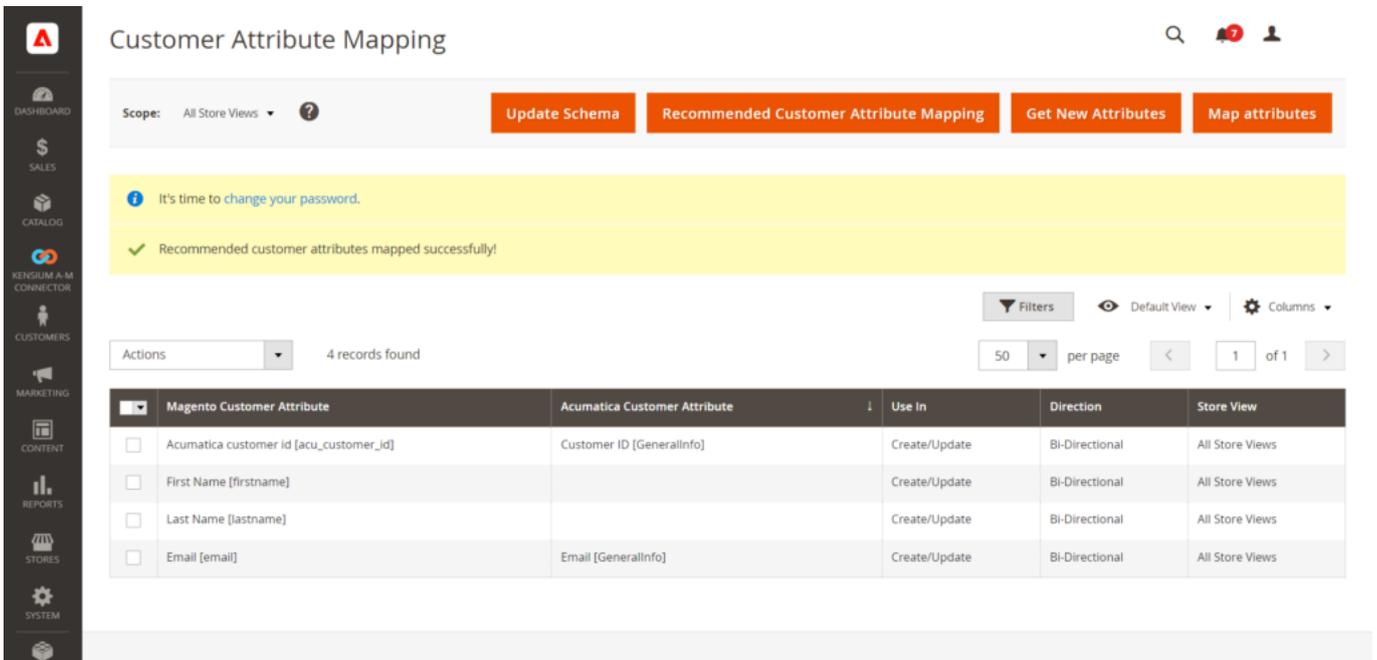
Filters Default View Columns

50 per page 1 of 1

Magento Customer Attribute	Acumatica Customer Attribute	Use In	Direction	Store View
We couldn't find any records.				

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### Confirmation pop-up for recommended customer attribute mapping



Customer Attribute Mapping

Scope: All Store Views

Update Schema Recommended Customer Attribute Mapping Get New Attributes Map attributes

It's time to change your password.

Recommended customer attributes mapped successfully!

Filters Default View Columns

Actions 4 records found 50 per page 1 of 1

Magento Customer Attribute	Acumatica Customer Attribute	Use In	Direction	Store View
<input type="checkbox"/> Acumatica customer id [acu_customer_id]	Customer ID [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/> First Name [firstname]		Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/> Last Name [lastname]		Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/> Email [email]	Email [GeneralInfo]	Create/Update	Bi-Directional	All Store Views

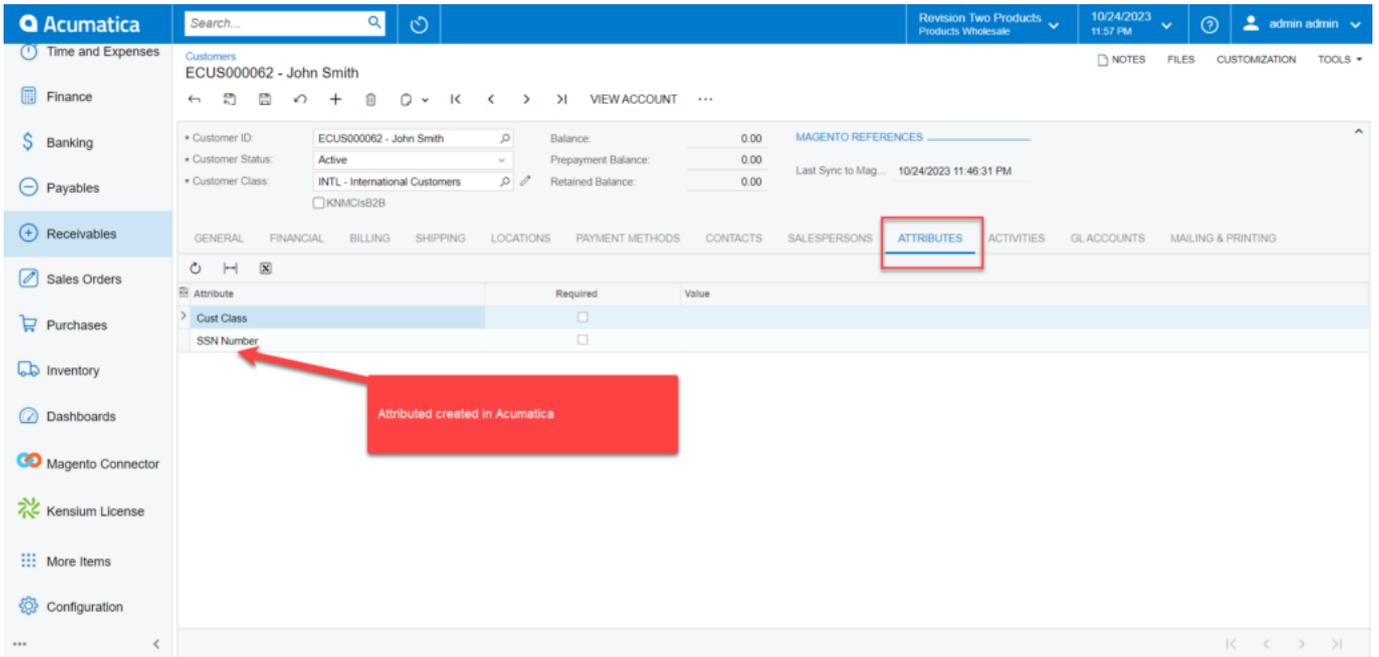
### Default values on recommended customer attribute mapping

- **Get New Attributes:**

Upon clicking the [Get New Attributes] a Grid Slider will open up and here you find the list of Acumatica Attributes which are not yet present in Magento. Provide a screenshot of the Grid.

To create any attribute, click on the Create button and it will open up the Magento Customer Attribute Form with the loaded Acumatica attribute data. Provide the Screenshot of the form. After configuring the attribute data in the form click save to create the attribute in the Magento.

Once the attribute is saved it will be available for the mappings.

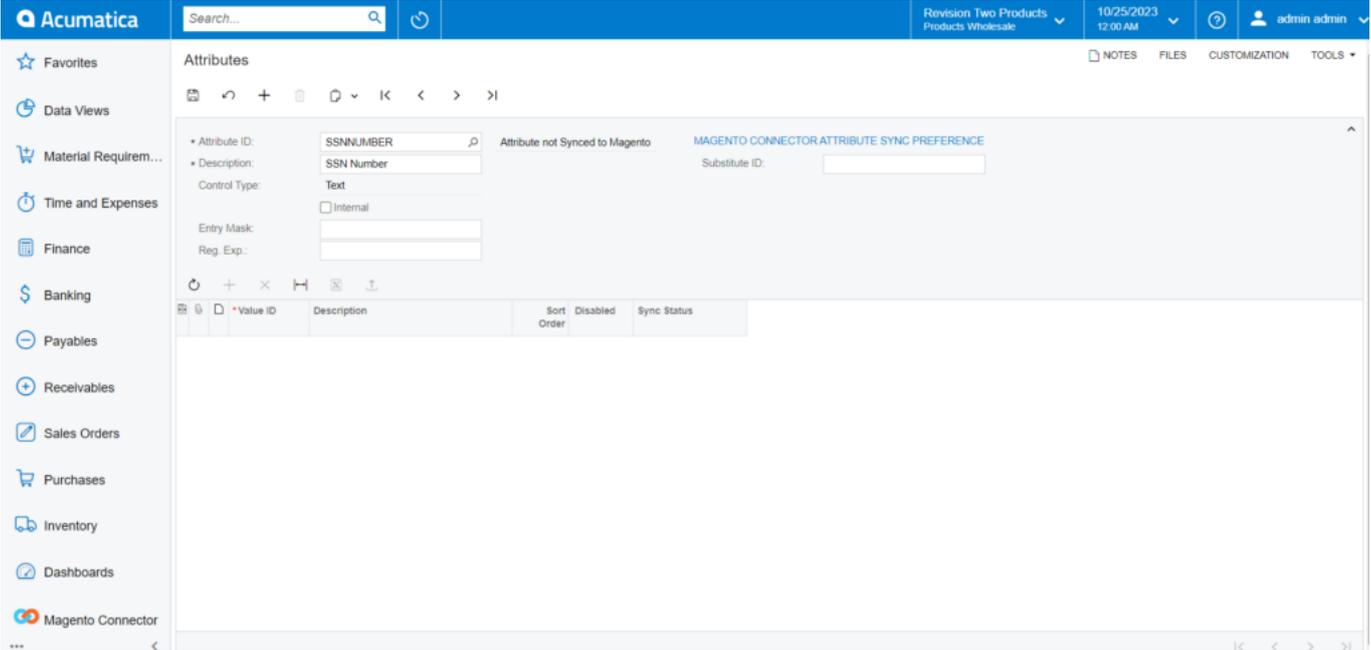


The screenshot shows the Acumatica interface for a customer named John Smith (ECUS000062). The 'ATTRIBUTES' tab is selected, displaying a table of attributes. The table has columns for 'Attribute', 'Required', and 'Value'. Two attributes are listed: 'Cust Class' and 'SSN Number'. A red box highlights the 'ATTRIBUTES' tab, and a red arrow points to the 'SSN Number' attribute. A red box with the text 'Attributed created in Acumatica' is overlaid on the table.

Attribute	Required	Value
Cust Class	<input type="checkbox"/>	
SSN Number	<input type="checkbox"/>	

Created New Attributes displayed

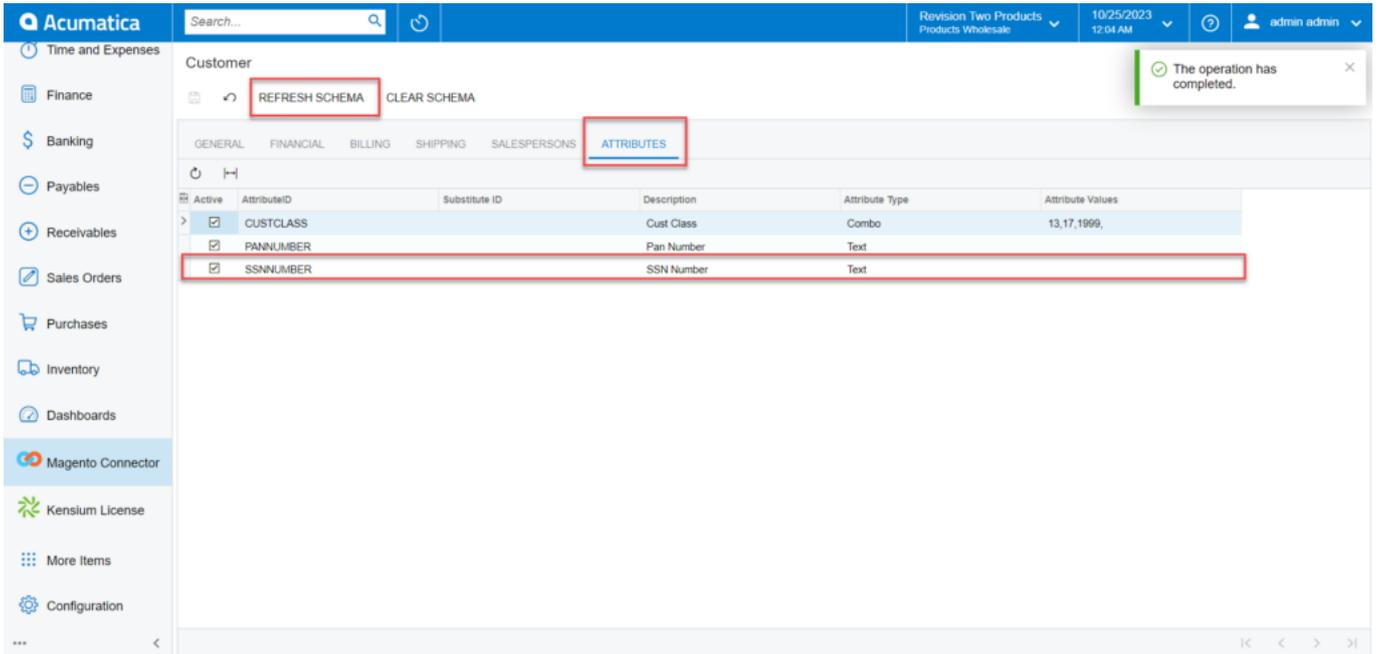
Go to the Attributes section.



The screenshot displays the Acumatica interface. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 10/25/2023 12:00 AM, admin admin). The left sidebar lists various business modules such as Favorites, Data Views, Material Requirement..., Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Magento Connector. The main content area is titled 'Attributes' and shows a form for editing an attribute. The attribute ID is 'SSNNUMBER', the description is 'SSN Number', and the control type is 'Text'. The attribute is marked as 'Attribute not Synced to Magento'. Below the form is a table with columns for Value ID, Description, Sort Order, Disabled, and Sync Status.

### Attributes section

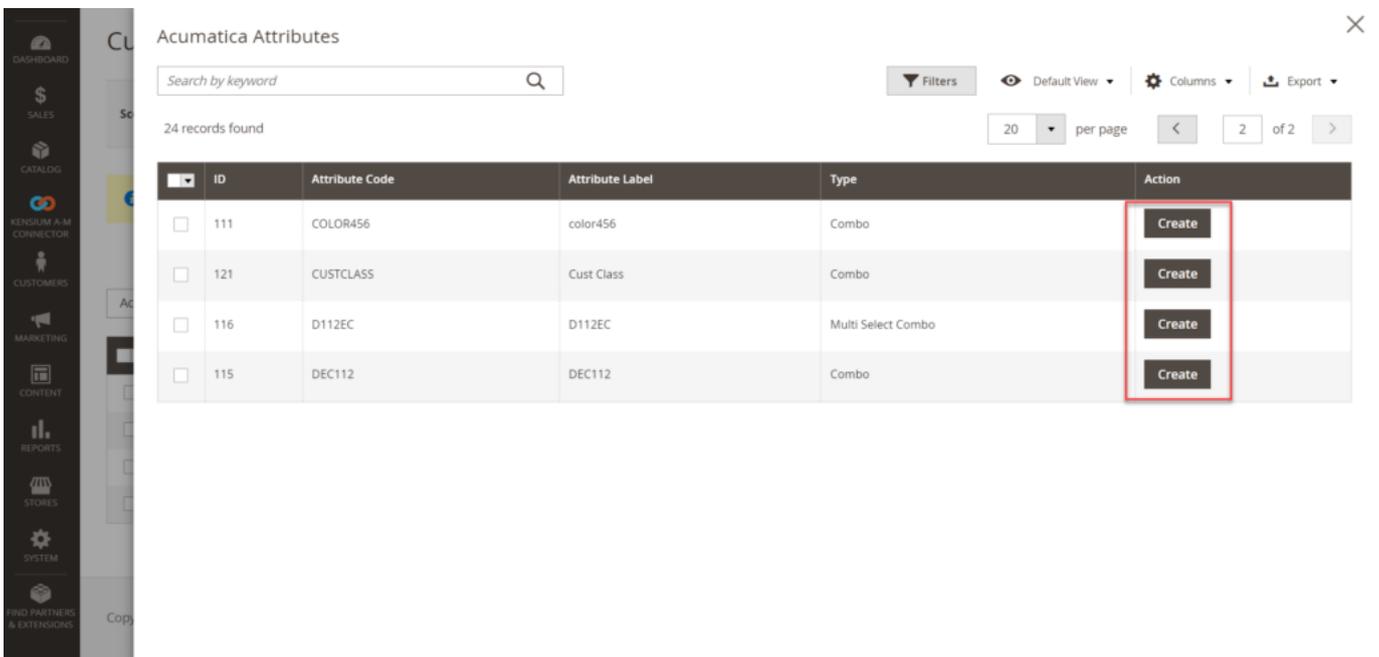
Click on the Customer Schema and click on the Refresh Schema the SSN Number, the newly created attribute should be displayed within Acumatica.



The screenshot shows the Acumatica interface for a Customer. The 'ATTRIBUTES' tab is selected. A table lists attributes with columns: Active, AttributeID, Substitute ID, Description, Attribute Type, and Attribute Values. The 'SSNUMBER' attribute is highlighted with a red box. A 'REFRESH SCHEMA' button is also highlighted with a red box. A notification in the top right corner states 'The operation has completed.'

Active	AttributeID	Substitute ID	Description	Attribute Type	Attribute Values
<input checked="" type="checkbox"/>	CUSTCLASS		Cust Class	Combo	13,17,1999,
<input checked="" type="checkbox"/>	PANNUMBER		Pan Number	Text	
<input checked="" type="checkbox"/>	SSNUMBER		SSN Number	Text	

### New attributes creation



The screenshot shows the 'Acumatica Attributes' list. It contains a table with columns: ID, Attribute Code, Attribute Label, Type, and Action. The 'Action' column contains 'Create' buttons for each attribute, which are highlighted with a red box. The table shows 24 records found.

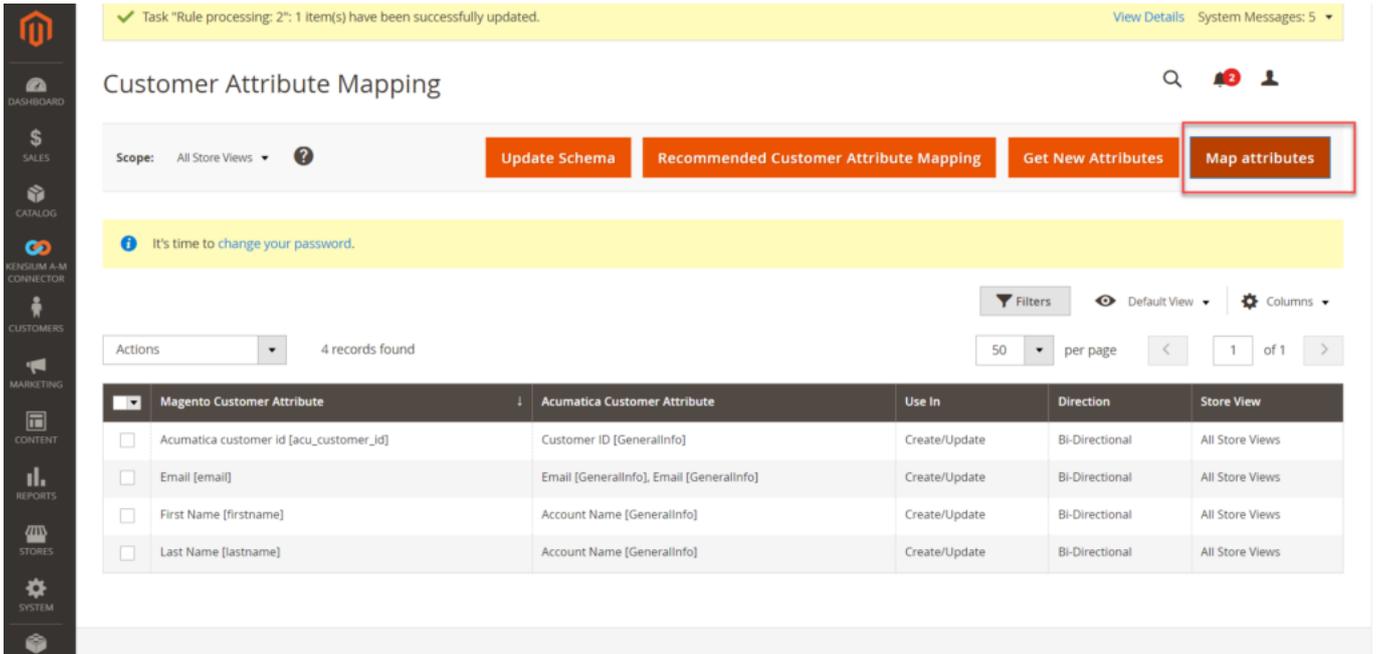
ID	Attribute Code	Attribute Label	Type	Action
111	COLOR456	color456	Combo	Create
121	CUSTCLASS	Cust Class	Combo	Create
116	D112EC	D112EC	Multi Select Combo	Create
115	DEC112	DEC112	Combo	Create

Click on [Create] for new attributes

The next screenshot is not available from Magento in the instance.

### 1. **Map Attributes:**

This feature allows you to configure to map the customer attributes. You can map the Magento Customer Attributes with the Acumatica Customer attribute. The mapping of customer attributes could be bi-directional. You will have 4 dropdowns as shown in the following figures.



Task \*Rule processing: 2\*: 1 item(s) have been successfully updated. [View Details](#) System Messages: 5

## Customer Attribute Mapping

Scope: All Store Views [?](#) [Update Schema](#) [Recommended Customer Attribute Mapping](#) [Get New Attributes](#) [Map attributes](#)

It's time to [change your password](#).

Filters Default View Columns

Actions 4 records found 50 per page 1 of 1

<input type="checkbox"/>	Magento Customer Attribute	Acumatica Customer Attribute	Use In	Direction	Store View
<input type="checkbox"/>	Acumatica customer id [acu_customer_id]	Customer ID [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	Email [email]	Email [GeneralInfo], Email [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	First Name [firstname]	Account Name [GeneralInfo]	Create/Update	Bi-Directional	All Store Views
<input type="checkbox"/>	Last Name [lastname]	Account Name [GeneralInfo]	Create/Update	Bi-Directional	All Store Views

Option to Map the Attributes

Upon clicking the **[Map Attributes]** the following pop-up will appear on your screen.

✕

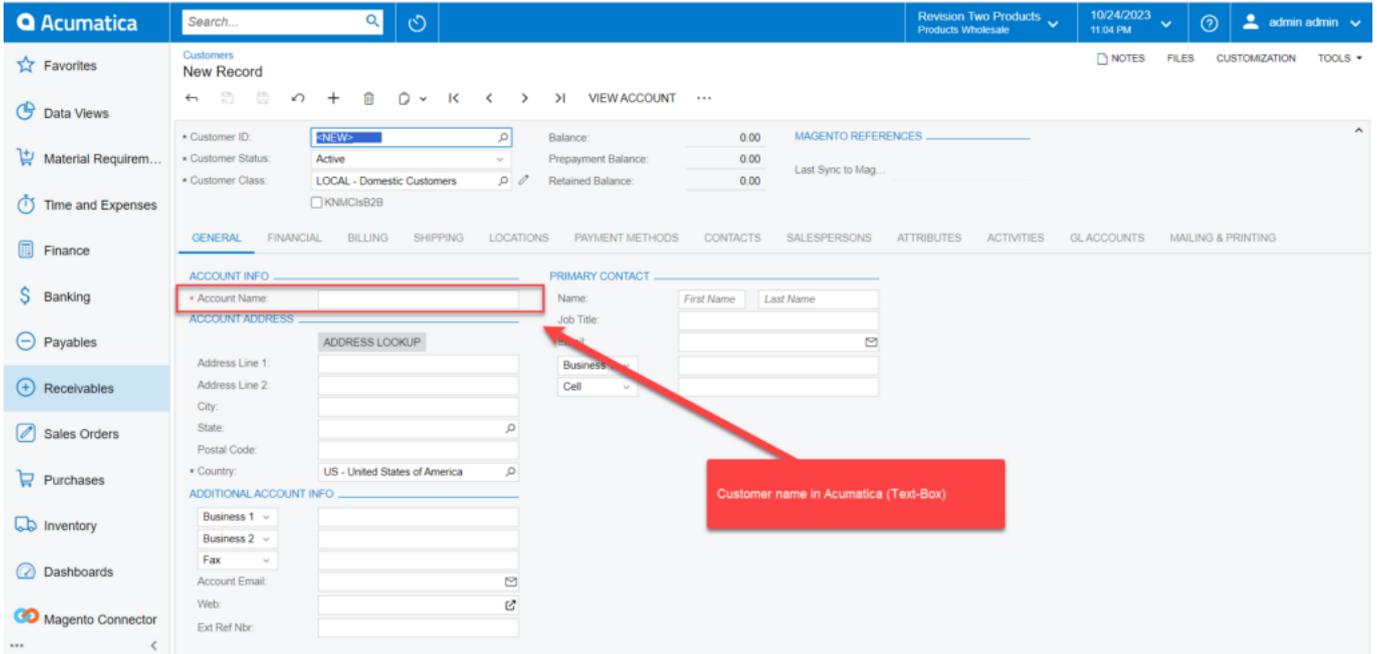
### Customer Attribute Mapping

Magento Customer Attribute	Acumatica Customer Attribute	Use In	Direction
Please select <span style="float: right;">⇅</span>	Please select <span style="float: right;">⇅</span>	Please Select <span style="float: right;">▼</span>	Please Sele Please Sel Acumatica Magento t Bi-Directio
<b>ADD</b>			<b>Save</b>

#### Pop-Up upon clicking the map Attributes

Field	Field Type	Description	
Magento Customer Attribute	Search Drop-down	Select the field which you want to map with the Acumatica from Magento.	
Acumatica Customer Attribute	Search Drop-down	Select the Acumatica field which should be mapped with the Magento field.	
Use In	Search Drop-down	Select the option from the following drop-down list. <ul style="list-style-type: none"> <li>- Create</li> <li>- Update</li> <li>- Create/ Update</li> </ul>	
Direction	Search Drop-down	Select the direction from the drop-down. For Customers, you will have the option for bi-directional as customer records will be having both in Magento and Acumatica. <ul style="list-style-type: none"> <li>- Acumatica to Magento</li> <li>- Magento to Acumatica</li> <li>- Bi-Directional</li> </ul> If you select only one direction then updates will always be triggered from one side, i.e., the selected side. If you select Bi-Directional then the updates will be triggered from both the end.	

Since in Acumatica, the Account name refers to the Customer name. However, in Magento Customer name is defined as two separate text boxes first name and last name.



Acumatica Search... Revision Two Products Products Wholesale 10/24/2023 11:04 PM admin admin

Customers New Record

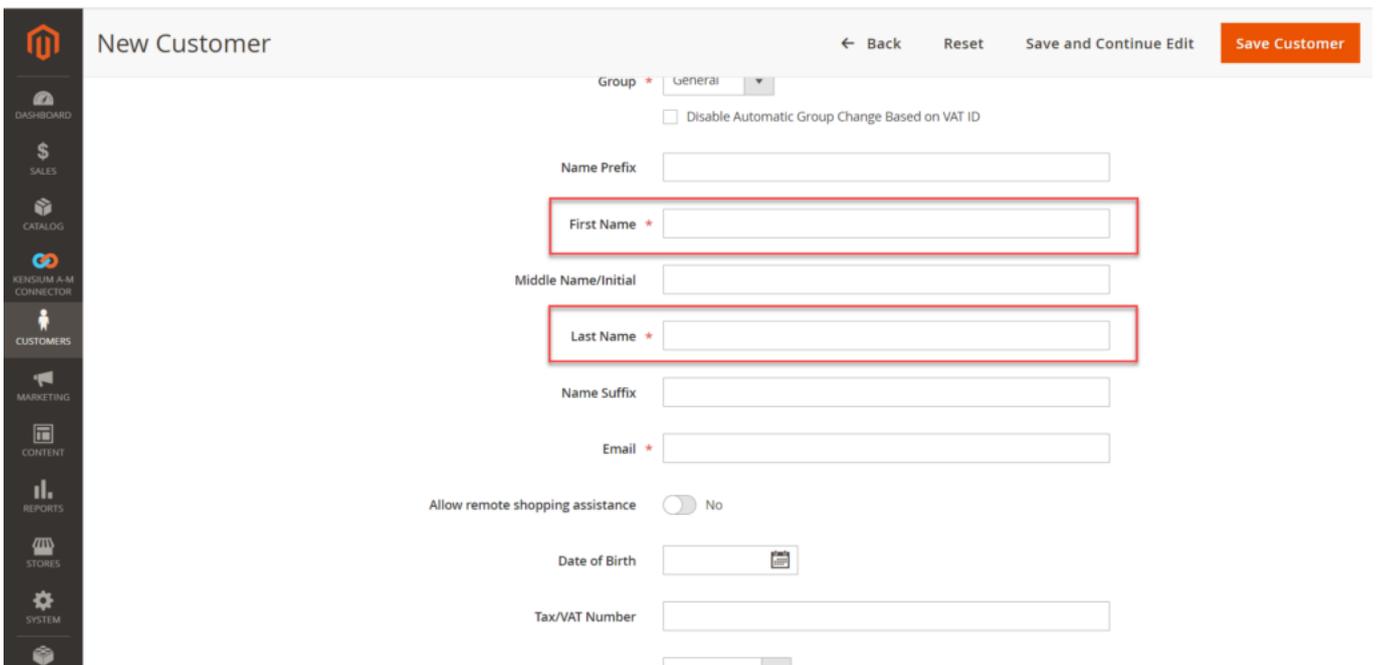
Customer ID: NEW- Balance: 0.00 MAGENTO REFERENCES  
 Customer Status: Active Prepayment Balance: 0.00  
 Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00 Last Sync to Mag...  
 KNMICisB2B

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES GL ACCOUNTS MAILING & PRINTING

ACCOUNT INFO PRIMARY CONTACT  
 Account Name: [Red Box] Name: First Name Last Name  
 ACCOUNT ADDRESS Job Title:  
 ADDRESS LOOKUP Business:  
 Address Line 1: Cell:  
 Address Line 2:  
 City:  
 State: Postal Code:  
 Postal Code:  
 Country: US - United States of America  
 ADDITIONAL ACCOUNT INFO  
 Business 1:  
 Business 2:  
 Fax:  
 Account Email:  
 Web:  
 Ext Ref Nbr:

Customer name in Acumatica (Text-Box)

Customer Name Field in Acumatica



New Customer Back Reset Save and Continue Edit Save Customer

Group \* General  
 Disable Automatic Group Change Based on VAT ID

Name Prefix  
 First Name \* [Red Box]  
 Middle Name/Initial  
 Last Name \* [Red Box]  
 Name Suffix  
 Email \*  
 Allow remote shopping assistance No  
 Date of Birth  
 Tax/VAT Number

Customer name is divided into First Name and Last Name

The Account Name will be mapped with the Customer's First Name and Last Name in Magento.

***In case you only have one name in Acumatica then at the time of mapping Magento will enter the name in the first name and the last name there will be a dot as it's a mandatory field.***