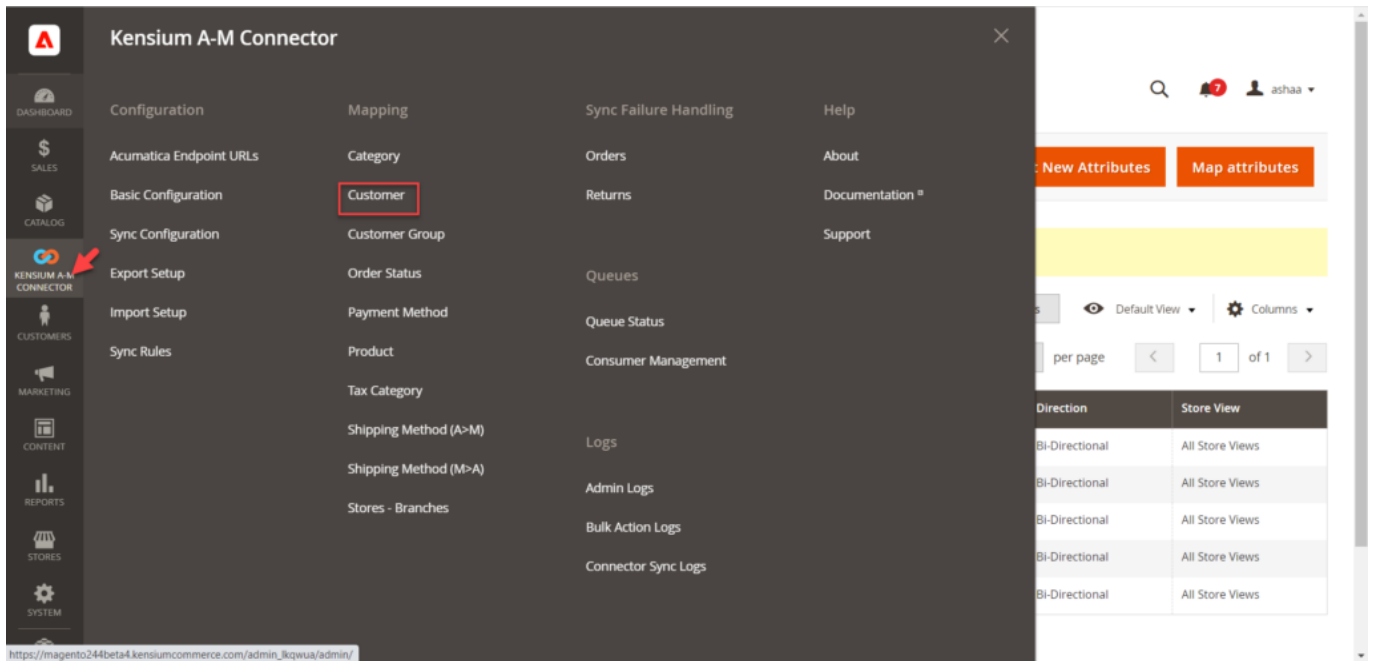


Customer Mapping



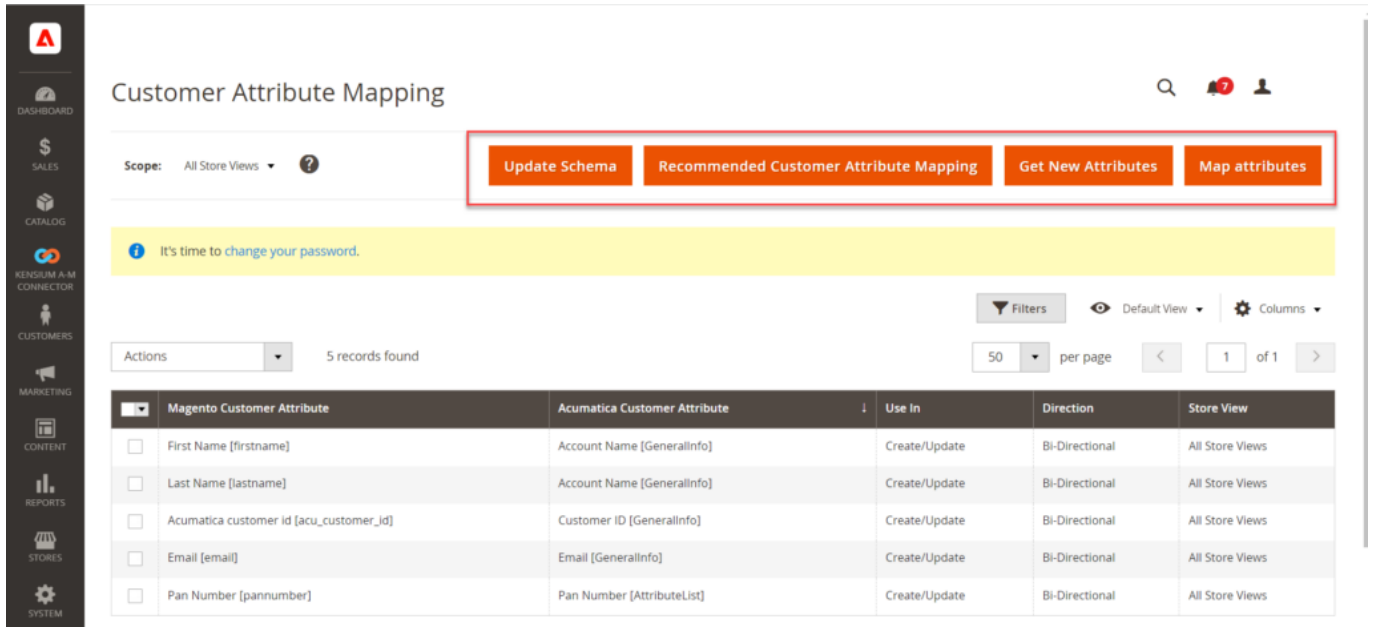
Customer Mapping is followed by Category mapping in the Mapping section upon clicking on the **[Kensium A-M]** connector. Upon clicking the **[Customer]**, you will be redirected to the following screen.



The screenshot displays the 'Kensium A-M Connector' admin interface. The left sidebar shows the 'KENSIMUM A-M CONNECTOR' menu item highlighted with a red arrow. The main content area is divided into four tabs: 'Configuration', 'Mapping', 'Sync Failure Handling', and 'Help'. The 'Mapping' tab is active, and the 'Customer' option under the 'Category' sub-tab is highlighted with a red box. The right sidebar shows a search bar, a notification bell with a red circle containing the number 7, and a user profile icon labeled 'ashaa'. Below these are two orange buttons: 'New Attributes' and 'Map attributes'. A table is visible in the background, showing columns for 'Direction' and 'Store View'.

Direction	Store View
Bi-Directional	All Store Views
Bi-Directional	All Store Views
Bi-Directional	All Store Views
Bi-Directional	All Store Views
Bi-Directional	All Store Views

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

Actions	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

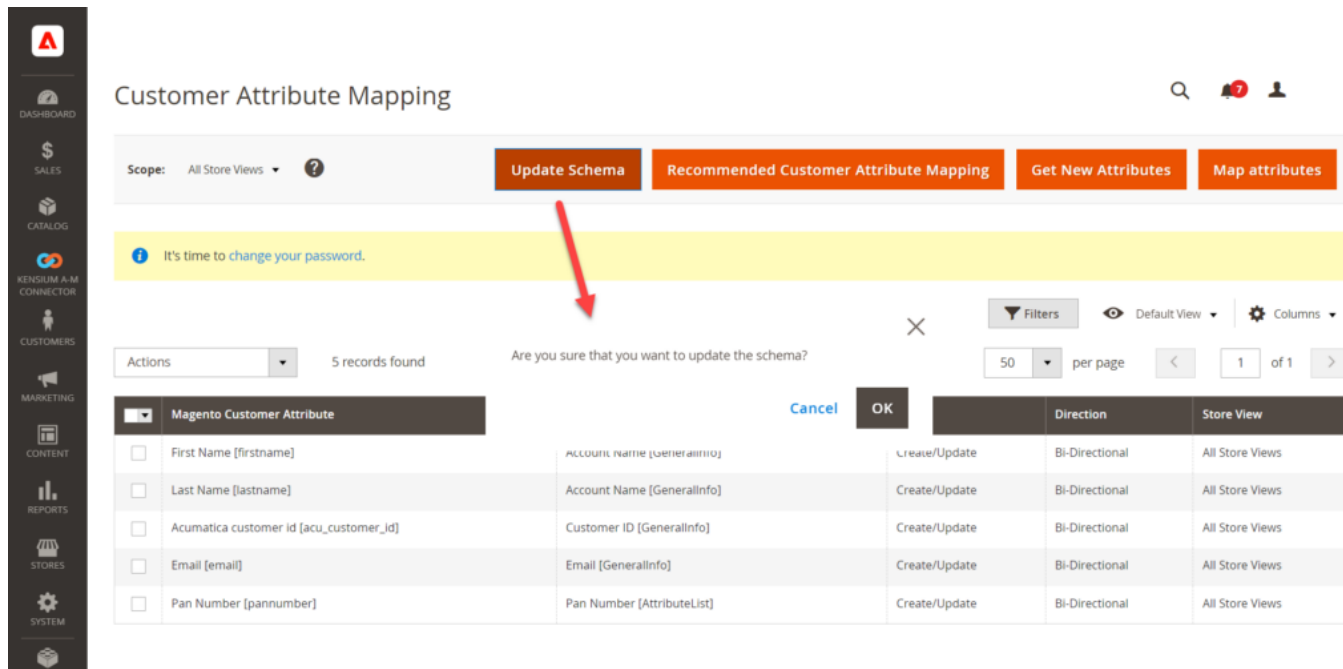
Options available in the Customer Attribute Mapping

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].



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 update the schema?

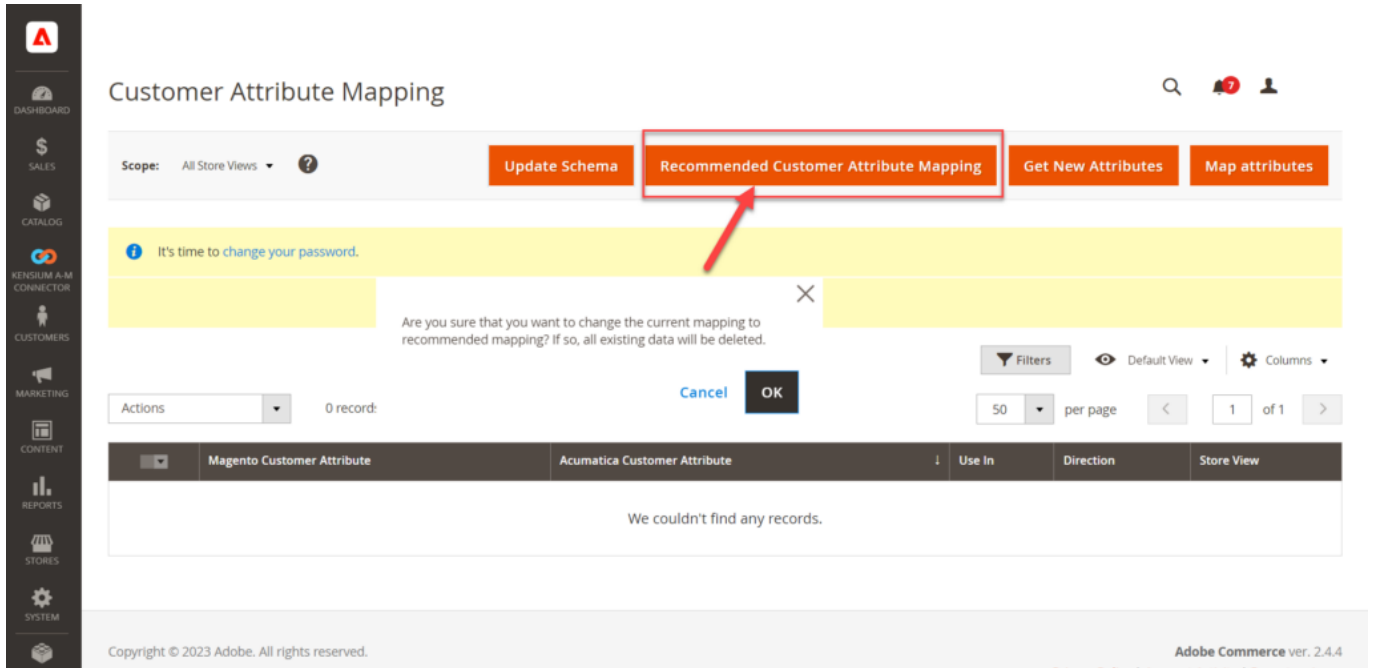
Cancel OK

	Magento Customer Attribute		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

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

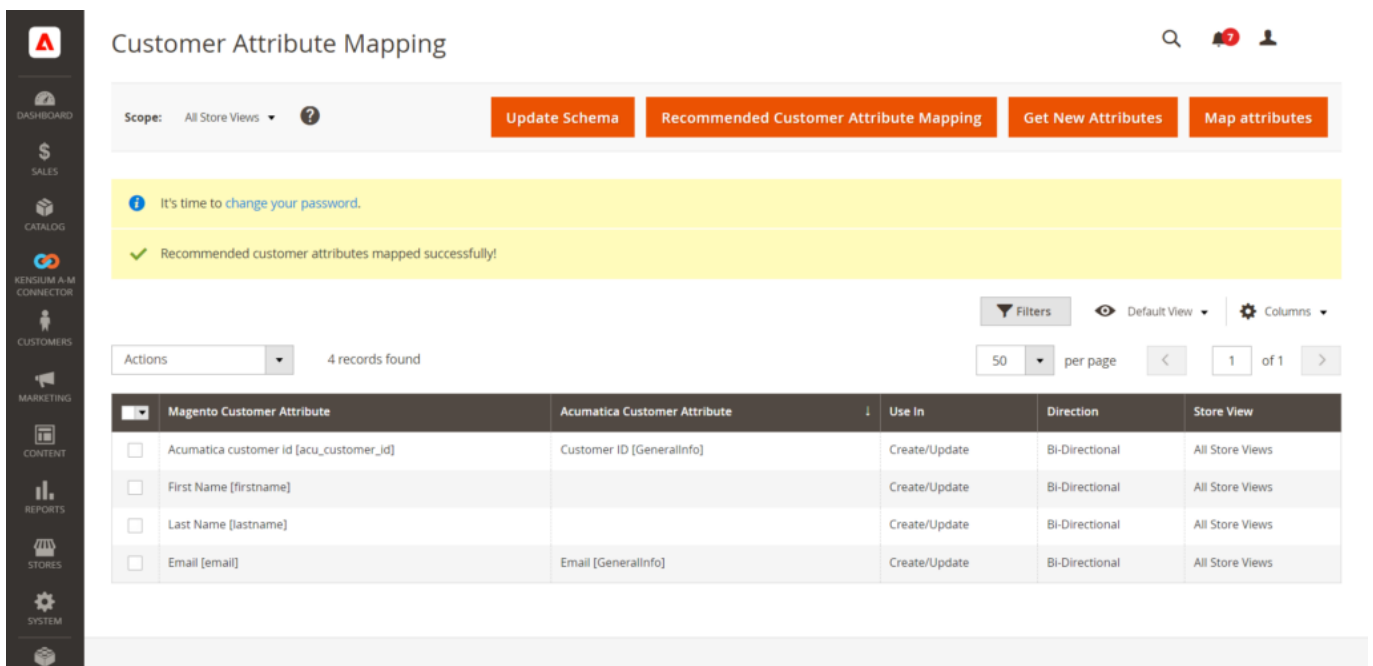
Filters Default View Columns

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

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

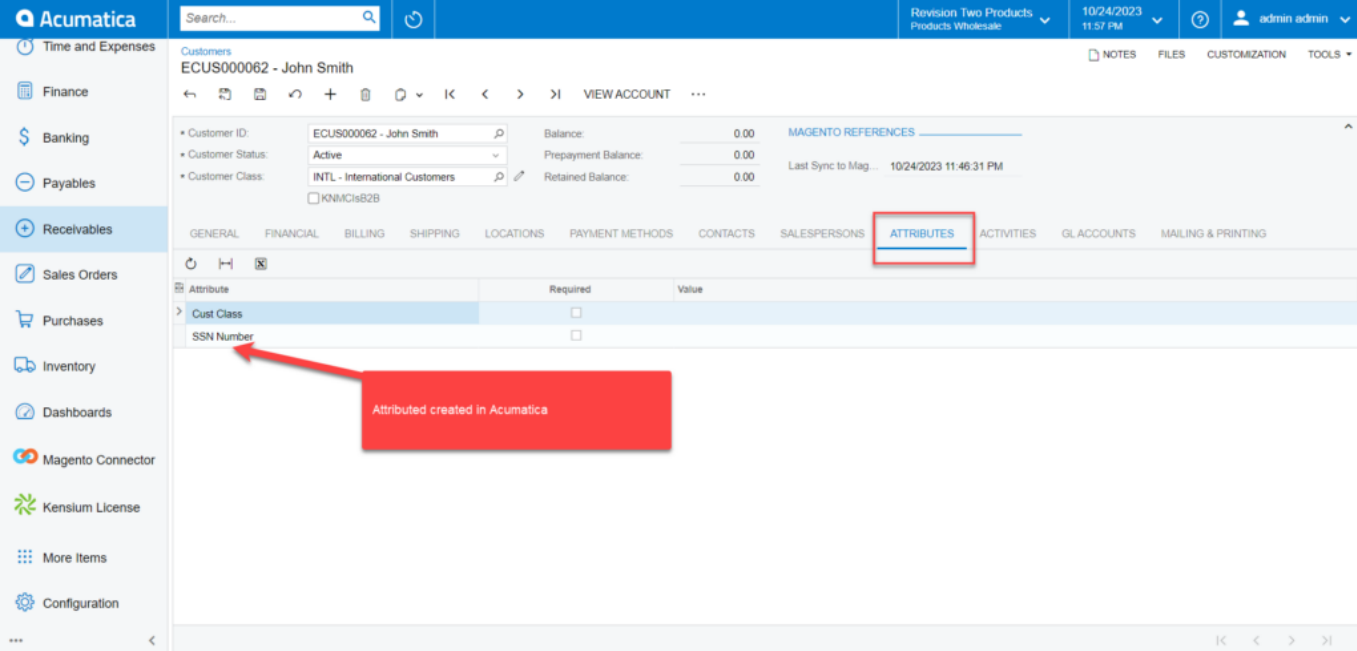
Default values on recommended customer attribute mapping

- **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.



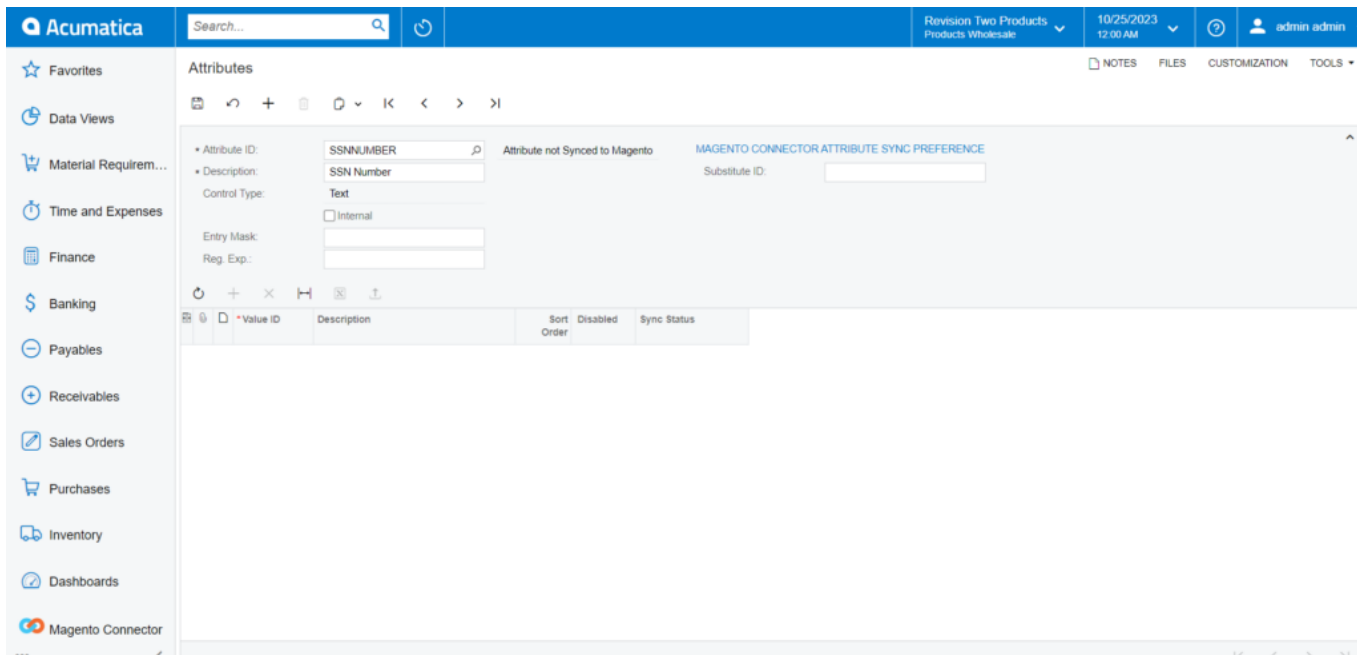
The screenshot shows the Acumatica interface for a customer named John Smith. The 'Attributes' tab is selected and highlighted with a red box. Below the tab, a table lists attributes:

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

A red arrow points to the 'SSN Number' attribute, and a red box contains the text 'Attributed created in Acumatica'.

Created New Attributes displayed

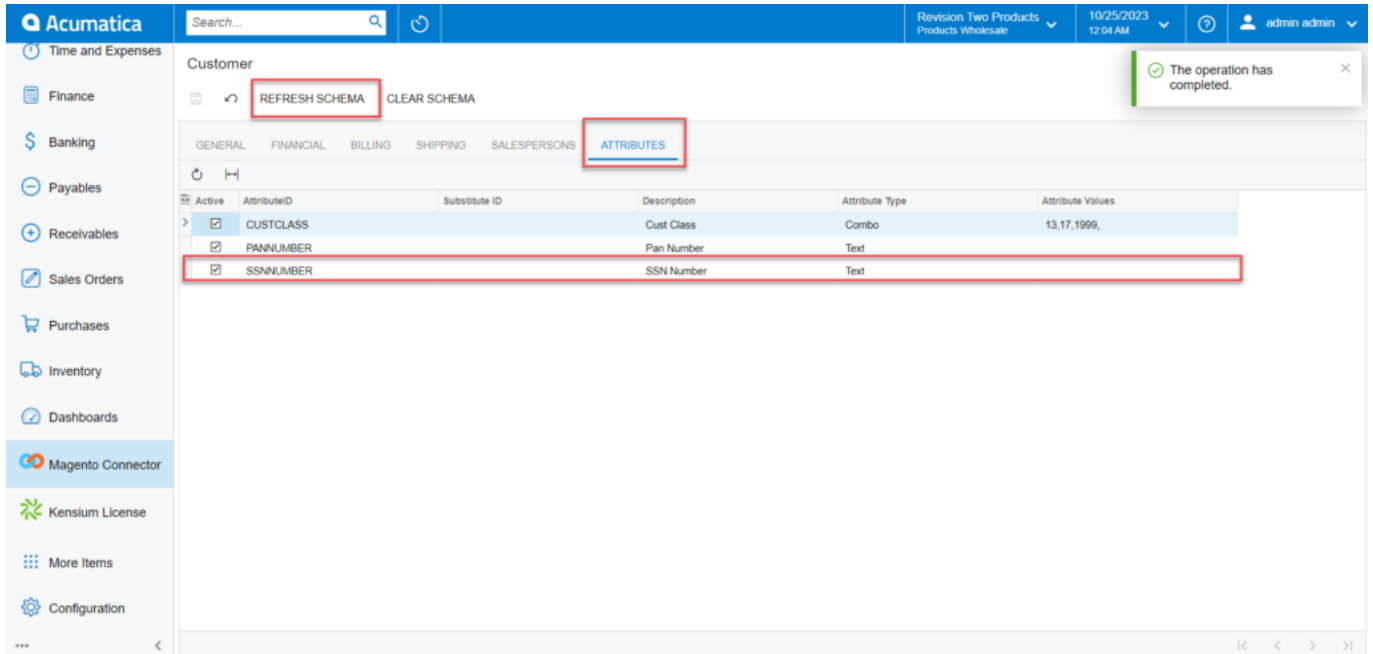
Go to the Attributes section.



The screenshot shows the Acumatica interface with the 'Attributes' section selected. The left sidebar contains various navigation items: Favorites, Data Views, Material Requirement..., Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Magento Connector. The main area displays the configuration for an attribute named 'SSN Number'. The 'Attribute ID' is 'SSNNUMBER', the 'Description' is 'SSN Number', and the 'Control Type' is 'Text'. There is a checkbox for 'Internal' which is currently unchecked. The 'Entry Mask' and 'Reg. Exp.' fields are empty. A message 'Attribute not Synced to Magento' is displayed. To the right, there is a section for 'MAGENTO CONNECTOR ATTRIBUTE SYNC PREFERENCE' with a 'Substitute ID' field. Below the configuration area, there is a table with columns: Value ID, Description, Sort Order, Disabled, and Sync Status. The table is currently empty.

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.



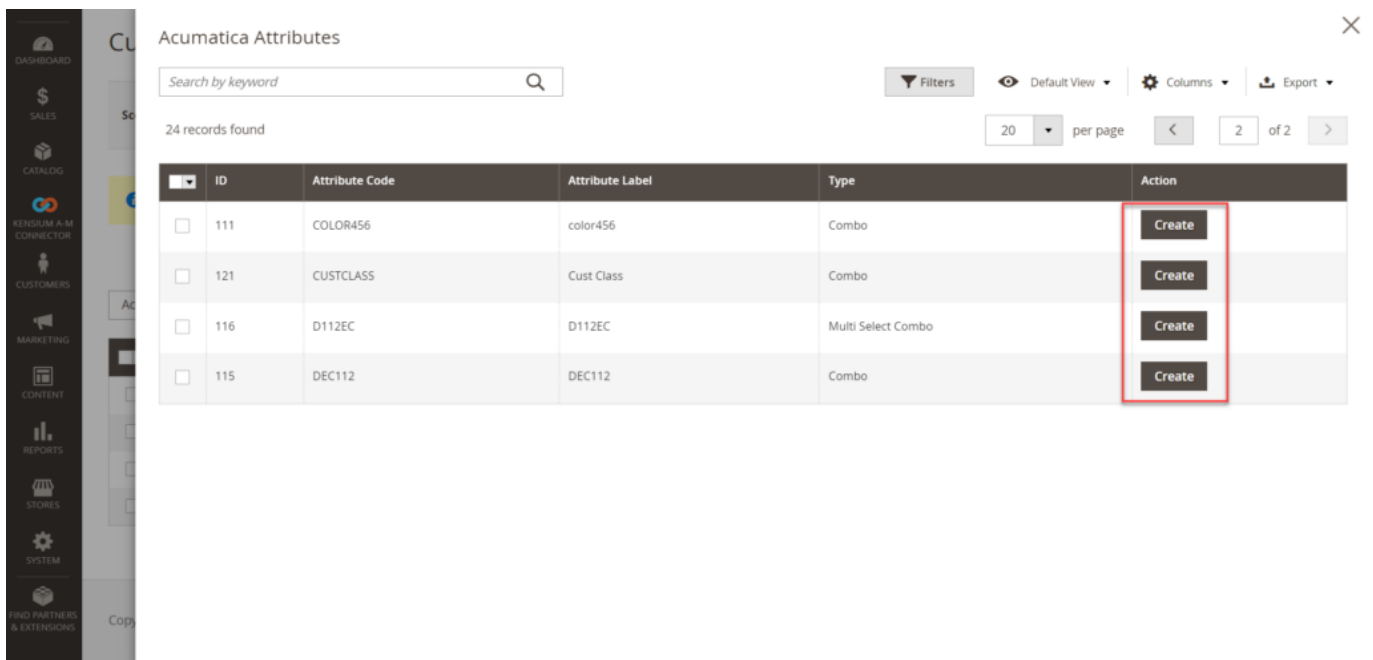
Customer

REFRESH SCHEMA CLEAR SCHEMA

GENERAL FINANCIAL BILLING SHIPPING SALESPERSONS ATTRIBUTES

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"/>	SSNNUMBER		SSN Number	Text	

New attributes creation



Acumatica Attributes

Search by keyword

Filters Default View Columns Export

24 records found 20 per page 2 of 2

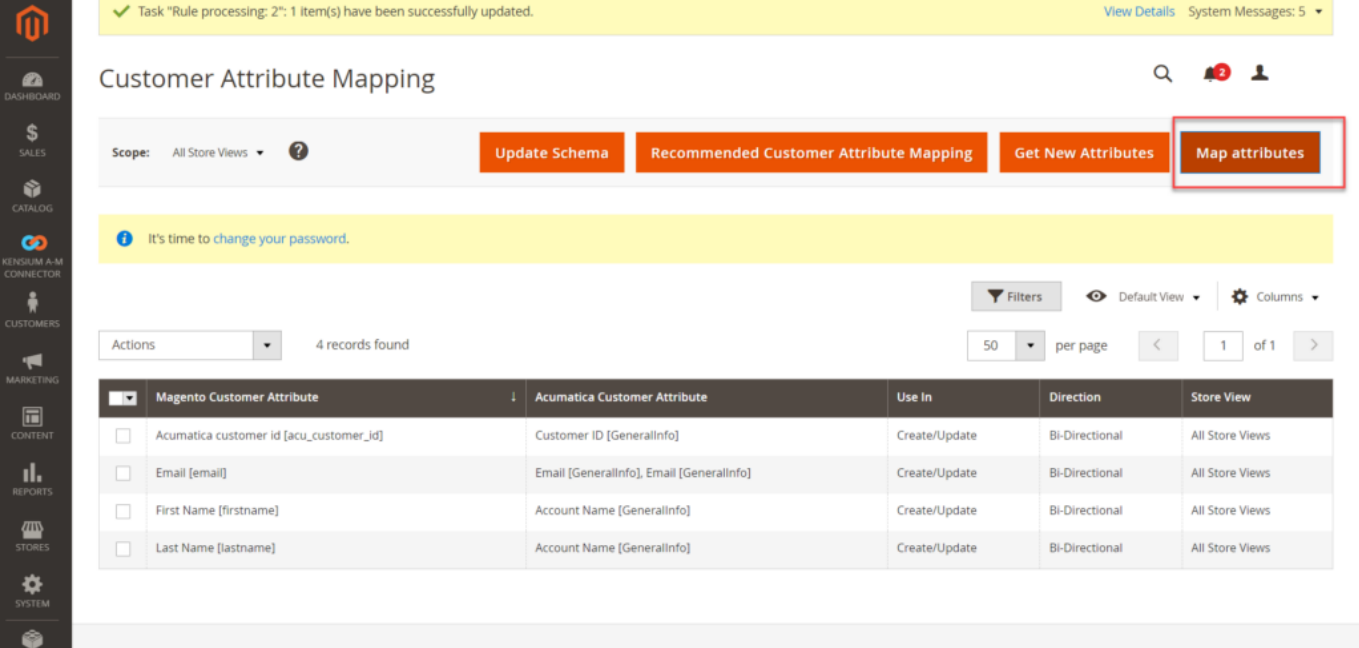
ID	Attribute Code	Attribute Label	Type	Action
111	COLOR456	color456	Combo	Create
121	CUSTCLASS	Cust Class	Combo	Create
116	D112EC	D112EC	Multi Select Combo	Create
115	DEC112	DEC112	Combo	Create

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

	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.

X

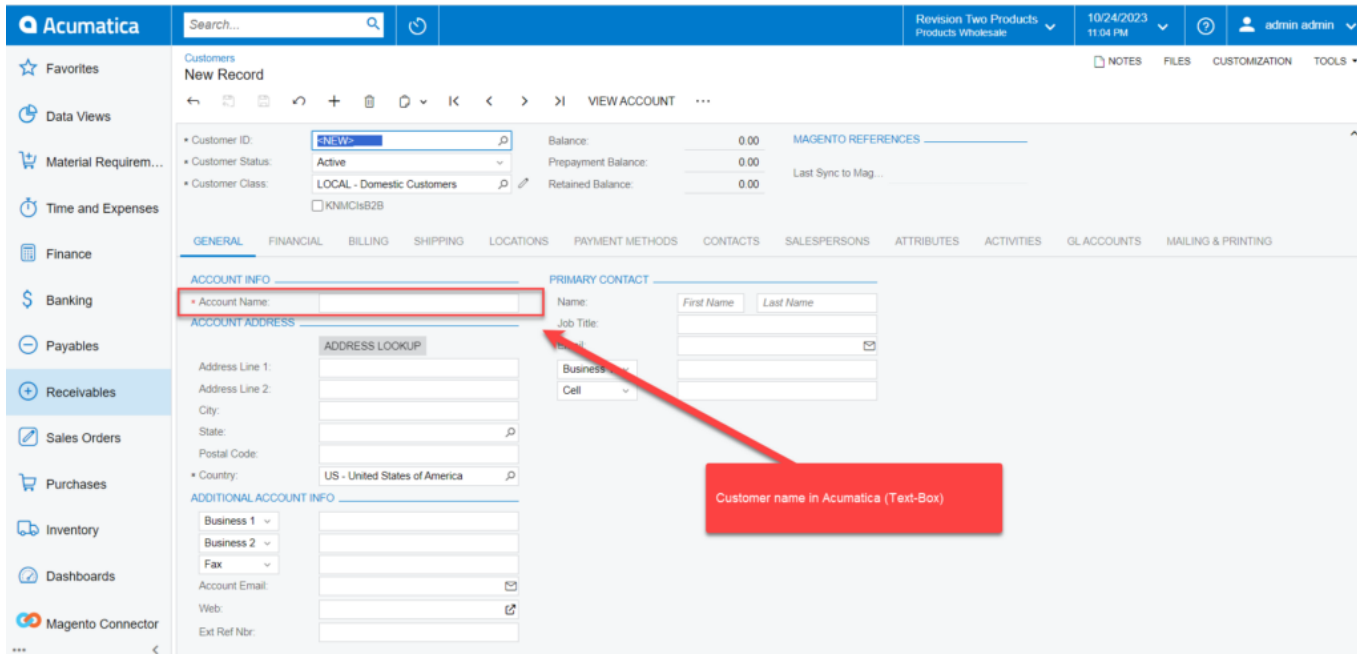
Customer Attribute Mapping

Magento Customer Attribute	Acumatica Customer Attribute	Use In	Direction
<input type="text" value="Please select"/>	<input type="text" value="Please select"/>	<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>
<div>ADD</div>			
<div>Save</div>			

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. - Create - Update - Create/ Update	
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. - Acumatica to Magento - Magento to Acumatica - Bi-Directional 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

NOTES FILES CUSTOMIZATION TOOLS

Customers
New Record

VIEW ACCOUNT

Customer ID: NEW- Balance: 0.00
Customer Status: Active Prepayment Balance: 0.00
Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00
☐ KNMICisB2B

MAGENTO REFERENCES
Last Sync to Mag...

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

ACCOUNT INFO
Account Name: [Red Box]

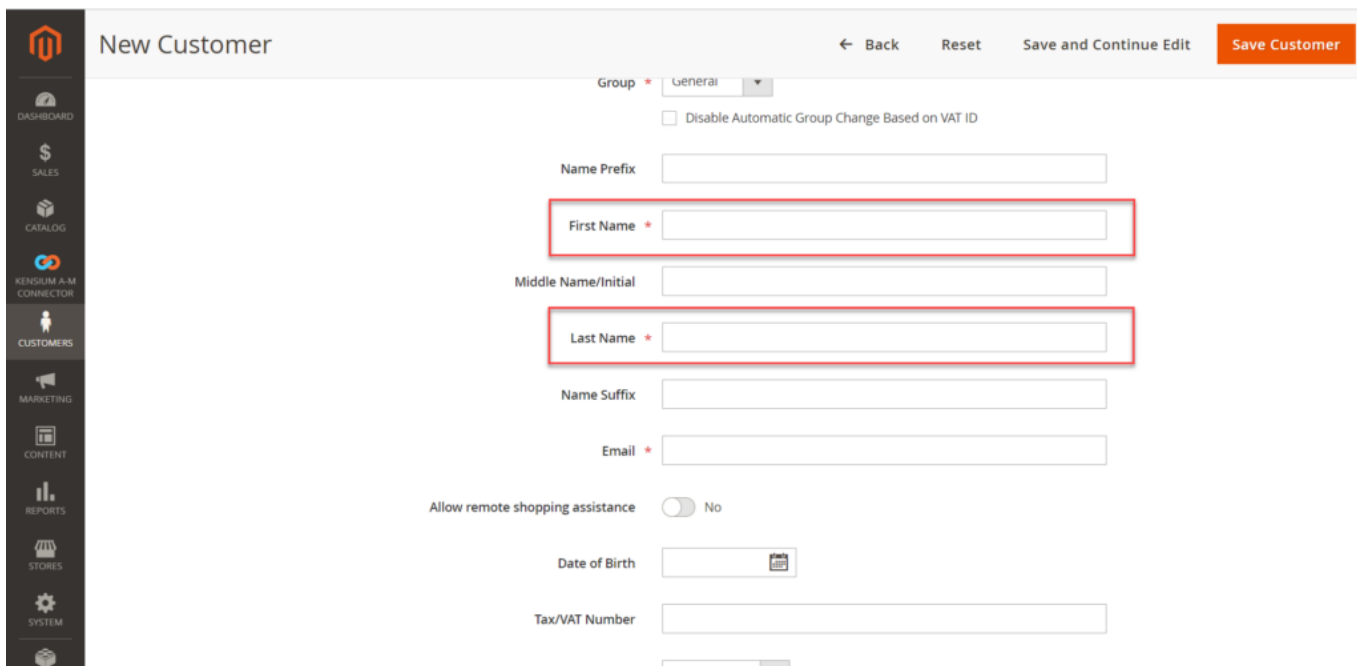
ACCOUNT ADDRESS
ADDRESS LOOKUP
Address Line 1:
Address Line 2:
City:
State:
Postal Code:
Country: US - United States of America

ADDITIONAL ACCOUNT INFO
Business 1
Business 2
Fax
Account Email:
Web:
Ext Ref Nbr:

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

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 *

Middle Name/Initial

Last Name *

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.