

Managing Companies in Better B2B

• Under the Companies option in Better B2B you will be able to view and add companies. Upon clicking on the Companies on the left panel the options will be visible.

BIGCOMMERCE		KENSIUM 🔣	≡	Companies					
Better B2B (QA) Sandbox Store		🗄 Dashboard		Companies					
📊 View Store		Companies	^	Refresh Add	Search Company Name /	Cu: Search			
AP Home		View							
Q Search or navigate to		🛅 Add		Acumatica Customer Id	Company Name	Status	Created At \land	Approved / Rejected On $ \! \! \! \! \! \! \! \! \! \! \! \! $	Action
< Apps	Î	Invoices		C00000329	curve	APPROVED	Dec 21st 2023	Dec 21st 2023	
		2 Quotes		C000000328	vamitham	APPROVED	Dec 20th 2023	Dec 20th 2023	
My Apps		Payment Mapping	~	C00000327	logitec	APPROVED	Dec 20th 2023	Dec 20th 2023	
Better B2B (Demo)		 Users Queues 	~	SANCHAYAN	SANCHAYAN	APPROVED	Dec 19th 2023	Dec 20th 2023	
		e Logs		B2BTEST457	SWEETY K	APPROVED	Dec 14th 2023	Dec 20th 2023	
		Acumatica Configura	tions 🗸	C00000326	COMPUTER 4	APPROVED	Dec 14th 2023	Dec 20th 2023	
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	, ,			C00000324	Computer 3	APPROVED	Dec 14th 2023	Dec 20th 2023	

Option to View Companies in Better B2B

In this section you will have the following columns:

- Acumatica Customer ID
- Company Name
- Status
- Created at
- Approved/ Rejected on
- Action

The Action button includes [Views] and [Delete]. The view option allows you to view the company details in B2B which have been synced from Acumatica.





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Better B2B (QA)		A Quotes		Acumatica Customer Id	Company Name	Status	Created At $\ \land$	Approved / Rejected On ${\scriptstyle\checkmark}$	Action
Sandbox Store		Payment Mapping	~	C000000329	curve	APPROVED	Dec 21st 2023	Dec 21st 2023	
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				C000000324	Computer 3	APPROVED	Dec 14th 2023	Dec 20th 2023	
				B2B001390	Computer 2	APPROVED	Dec 14th 2023	Dec 20th 2023	
				B2B389	Computer TEST	APPROVED	Dec 14th 2023	Dec 20th 2023	
	~			B2B388	Prefix Test 2	APPROVED	Dec 13th 2023	Dec 20th 2023	

View and Delete option in Companies.

Upon clicking on the [View] button application will redirect you to a new page with all the company details. This includes the Basic Information, Company User(s), Payment Methods, Address Book, and User Roles as shown below. We have discussed these options in the manual in detail.





		🔣 KENSIUM	≡	Company Detail	Ð
Better B2B (QA) Sandbox Store		🗄 Dashboard		TCS (C000000289) APPROVED	Sync Company To Acumatica
🖬 View Store		Companies	~	Basic Information Company User(s) Payment Methods Address Book User Roles	
Ք Home		2 Invoices			
Q Search or navigate to		a Quotes		Company Name *	
< Apps	î	Payment Mapping	~	TCS	
		🚊 Users	~	Acumatica Customer Id *	
Marketplace My Apps		Queues		C00000289	
				Company Email *	
Better B2B (Demo)	🕒 Logs		tcs@mailnator.com	
		Acumatica Configura	tions 🗸	Business Type	
		l Settings	~	Default ‡	
				Customer Class *	
				Domestic Customers	
				Price Class	
	~				
					SAVE

Viewing the Company

The application allows you to [Sync Company to Acumatica] and upon clicking you will get a confirmation message pop up with an [OK] and [Cancel] option as shown below.





BIGCOMMERCE		KENSIUM ≡	Company Detail	Ð
Better B2B (QA) Sandbox Store		Dashboard	CCS (C00000289)	Sync Company To Acumatica
🖬 View Store		Companies	Basic Information Company User(s) Payment Methods Address Book User Roles	
<mark>н</mark> е Ноте		Invoices		
Q Search or navigate to		🚊 Quotes	Company Name*	
< Apps	Î	Payment Mapping	TCS Confirmation	
Marketplace		🚊 Users	Acumat C0000 Are you sure you want to sync TCS company to Acumatica?	
My Apps		O Queues	Compan	
Better B2B (Demo)		\varTheta Logs	tcs@n	
		Acumatica Configurations	Busines	
		Ø Settings	Default	
			Customer Class *	
	U,		Domestic Customers	
			Price Class	
Help	~			SAVE

Confirmation Message for sync to Acumatica

In the Company Detail page, you can make changes as per your business requirements and [Save] it.

The [Delete] option under action will allow you to delete the Company and related information from the BetterB2B.

Upon clicking on [Delete] you will get a pop up with a [Delete] and [Cancel] option.





	«	\mathbb{K} Kensium \equiv	Companies	9
Better B2B (QA) Sandbox Store		Dashboard	Companies	
🖬 View Store		Companies ^	Refresh Add TCS Search	
🐥 Home		View	Acumatica Customer Company Name Status Created At A	Approved / Rejected Action
Q Search or navigate to		Add 📑	Id	On ~
< Apps	Î	Invoices	CONDUCT Confirmation	Nov 22nd 2023 ***
Marketplace		Quotes	Are you sure you want to delete TCS?	View 20 👻
My Apps		Payment Mapping V		
Better B2B (Demo)		🙎 Users 🗸 🗸	CANCEL DELETE	
		O Queues	CAREL OLLET	
		🕒 Logs		
		Acumatica Configurations		
	1	😰 Settings 🗸 🗸		
Help	^			

Confirmation Message before deleting

The [Add] option allows you to enter the Company Details directly into Better B2B. Upon clicking on the Add option you will be redirected to the following screen to enter the Basic Information, Company Email, Address Line, Country, State, Zip Code etc. Field with the asterisk marks are the mandatory fields.





	«	\mathbb{K} kensium \equiv	Company Detail	Э
Better B2B (QA) Sandbox Store		B Dashboard	< Add Company	
🖬 View Store		Companies ^	Basic Information Company User(s) Payment Methods Address Book User Roles	
🐥 Home		View		
Q Search or navigate to		Add	Company Name *	
< Apps	Î	දු Invoices	Company Email *	
Marketplace		<u>Quotes</u>		
My Apps		Payment Mapping 🗸	Address Line 1*	
Better B2B (Demo)		<u>e</u> Users v		
		O Queues	Address Line 2	
		🕒 Logs		
		Acumatica Configurations \checkmark	City *	
	Ľ	🕼 Settings 🗸 🗸	Select a country *	
			:	
Help	^			SAVE

Add Company Details

Apart from Company details you can add the following from here which we have explained in detail in the manual.

- Company User[s]
- Payment Method
- Address Book
- User Roles

