

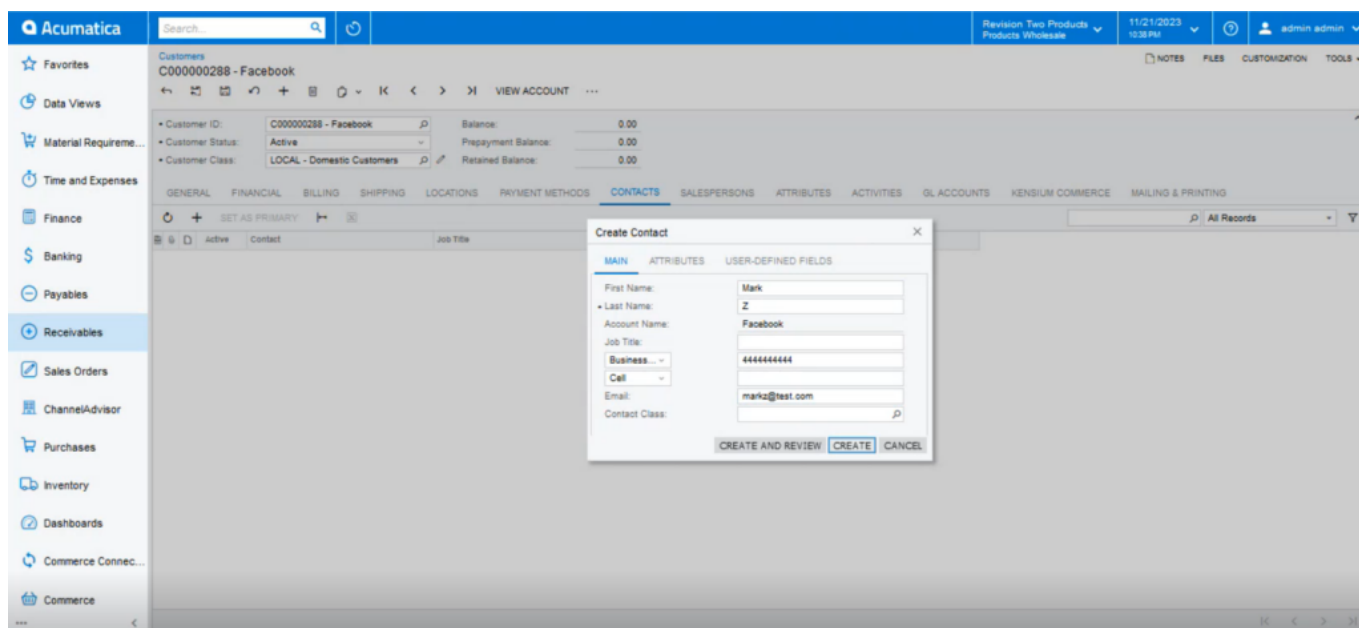
Managing Customer Contact Sync in B2B



You can sync the Customer contacts of Acumatica to B2B. The contacts of Acumatica will be treated as users in B2B.

You need to follow the steps for successful synchronization.

Step 1: On the Customer Screen create a new contact.



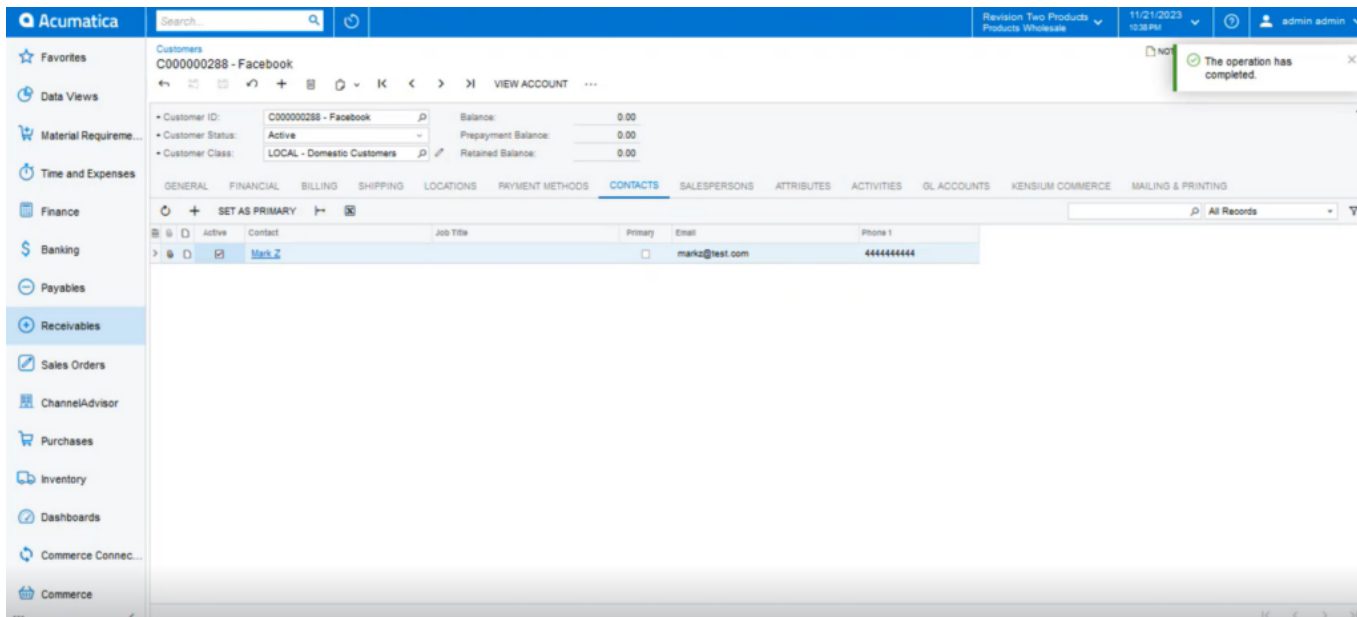
The screenshot shows the Acumatica Customer screen for 'C000000288 - Facebook'. The 'CONTACTS' tab is selected. A 'Create Contact' dialog box is open, showing the following fields:

MAIN	
First Name:	Mark
Last Name:	Z
Account Name:	Facebook
Job Title:	
Business:	4444444444
Cell:	
Email:	markz@test.com
Contact Class:	

Buttons at the bottom: CREATE AND REVIEW, CREATE, CANCEL.

Creating a customer within Acumatica

Step 2: The contact will be reflected on the grid.



Acumatica

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admin admin

Customers
C000000288 - Facebook

VIEW ACCOUNT

Customer ID: C000000288 - Facebook Balance: 0.00
 Customer Status: Active Prepayment Balance: 0.00
 Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00

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

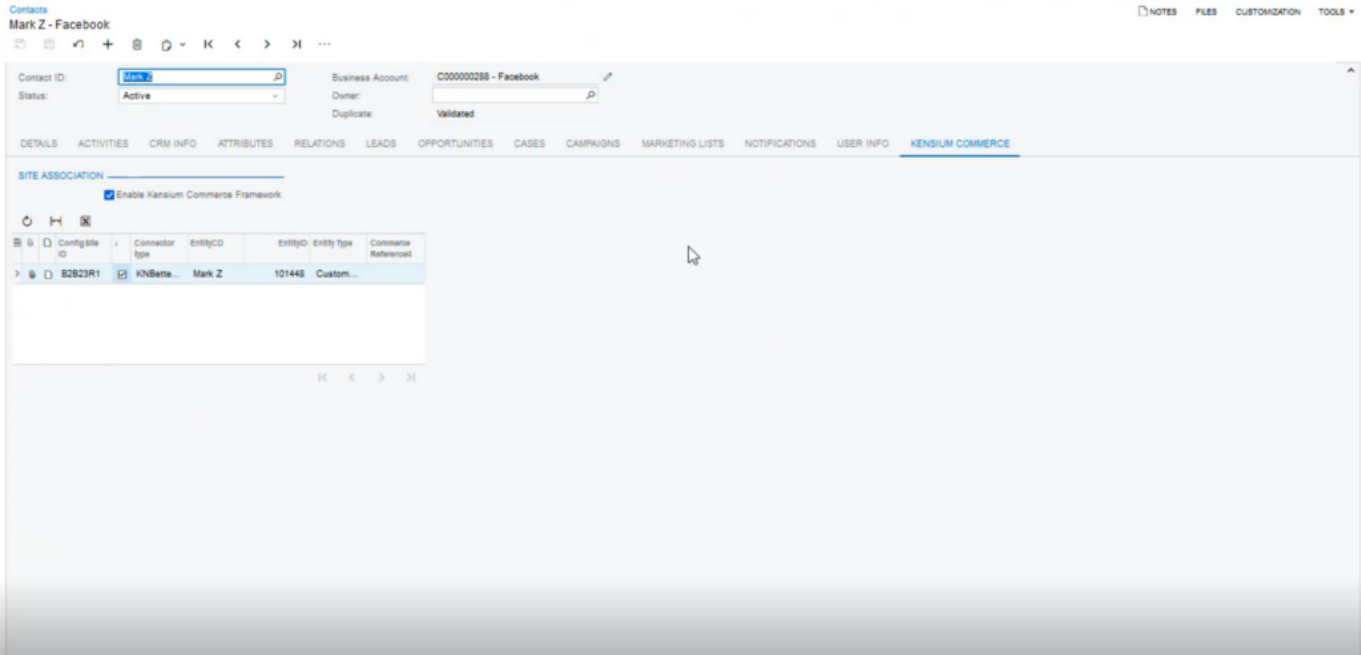
SET AS PRIMARY

Active	Contact	Job Title	Primary	Email	Phone 1
<input checked="" type="checkbox"/>	Mark Z		<input type="checkbox"/>	markz@test.com	4444444444

All Records

Contact Created against the Customer.

Step 3: Click on the Contact a new pop-up will appear. You will be able to view an option for [Kensium Commerce]. Click on Kensium Commerce ☐ Check Enable Kensium Commerce Framework under the site association. You need to enable the Connection Type.



Illustration

Step 4: Once the customer, contacts and location are synced the commerce reference ID will be generated and updated under the Commerce Reference ID.

Customers
C000000288 - Facebook

Customer ID: C000000288 - Facebook Balance: 0.00
Customer Status: Active Prepayment Balance: 0.00
Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00

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

SITE ASSOCIATION

Enable Kensium Commerce Framework

Config Site ID	Active	Connector Type	Commerce Reference ID
B2B23R1	<input checked="" type="checkbox"/>	KNBetterB2B.KNB2B...	351

The commerce reference ID

Step 5: Go to the Customer Log and you will be able to view the customer contact synced.

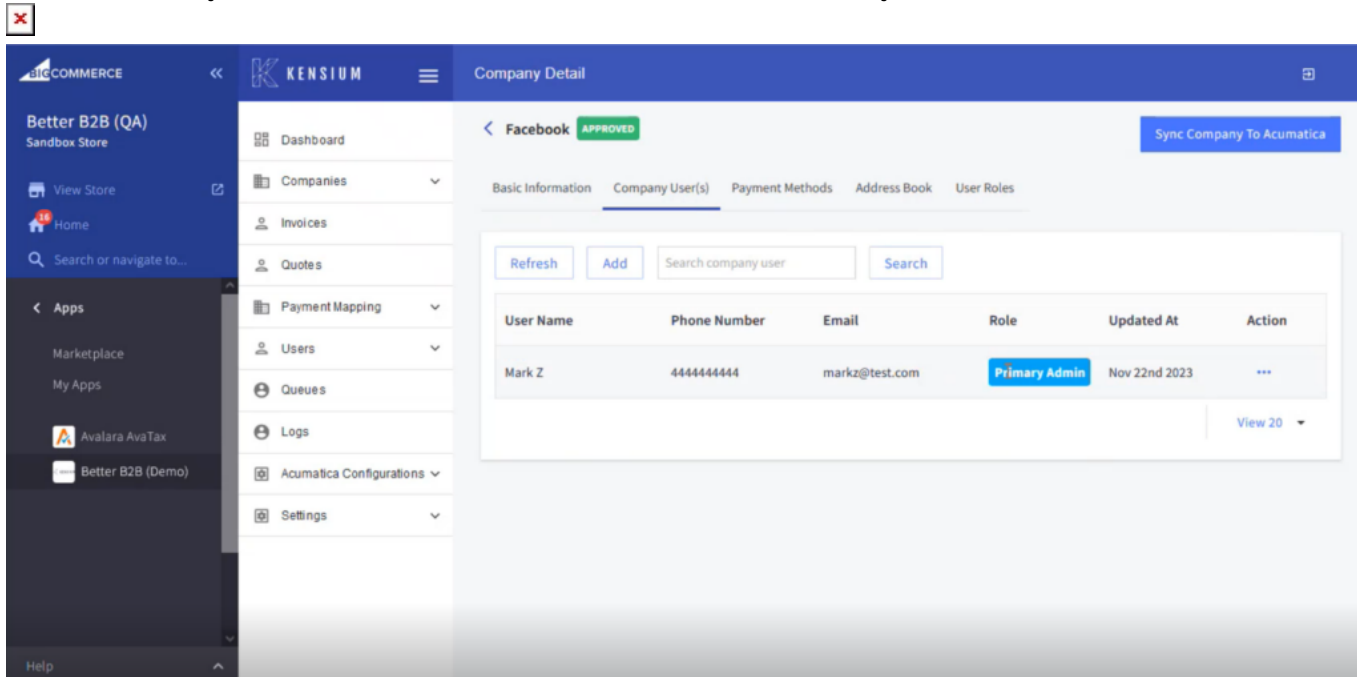
Logs

From Date: From Time: To Date: To Time:

Level	Action Type	Message	Endpoint URL	Description	Login User	Log Date	Log Time
INFO	Customer Conta...	[email:"mark@test.com","job_title":null,"first_name":...	https://betterb2b.kensiumcommerce.com/...	Customer Contact is created/updated successfully.	admin	11/21/2023	10:39 PM
INFO	Customer Conta...	[email:"mark@test.com","job_title":null,"first_name":...	https://betterb2b.kensiumcommerce.com/...	Customer Contact is created/updated successfully.	admin	11/21/2023	10:39 PM
INFO	Customer Locati...	[address_label:"Primary Location","first_name":"Fac...	https://betterb2b.kensiumcommerce.com/...	Customer Location is created/updated successfully.	admin	11/21/2023	10:38 PM
INFO	Customer Sync	[company_name:"Facebook","company_phone":"87...	https://betterb2b.kensiumcommerce.com/...	Customer data is created/updated successfully.	admin	11/21/2023	10:36 PM
INFO	Customer Sync	[company_name:"Facebook","company_phone":"87...	https://betterb2b.kensiumcommerce.com/...	Customer(s) created/updated successfully in Commerce.	admin	11/21/2023	10:36 PM
ERROR	Customer Sync	[company_name:"Facebook","company_phone":"87...	https://betterb2b.kensiumcommerce.com/...	Customer(s) sync failed [code:"400","data":"","message":["city":["Th...	admin	11/21/2023	10:35 PM
INFO	Customer Sync	[company_name:"Facebook","company_phone":"87...	https://betterb2b.kensiumcommerce.com/...	Customer(s) sync failed [code:"400","data":"","message":["city":["Th...	admin	11/21/2023	10:35 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	9:51 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	8:53 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	7:55 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	6:57 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	5:59 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	5:01 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	4:03 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	3:05 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	2:07 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	1:09 PM
INFO	BearerToken	RefreshToken	KN.CF.52.00	Token Generated successfully	admin	11/21/2023	12:11 PM

Customer Contact ID synced to Better B2B

Step 6: Go to the B2B app and click on [Company]. Click on the [Company User(s)] you will be able to see the Username synced from Acumatica. Here the user role is [Primary Admin].



The screenshot shows the 'Company Detail' page for 'Facebook' in the KENSUM application. The 'Company User(s)' tab is selected, displaying a table of users. The table has columns: User Name, Phone Number, Email, Role, Updated At, and Action. A single user is listed: Mark Z, with Phone Number 444444444, Email markz@test.com, Role Primary Admin, and Updated At Nov 22nd 2023. The Role 'Primary Admin' is highlighted in a blue box. There is a 'Sync Company To Acumatica' button in the top right corner of the tab area.

User Name	Phone Number	Email	Role	Updated At	Action
Mark Z	444444444	markz@test.com	Primary Admin	Nov 22nd 2023	...

User Name synced in the Company User(s)

Step 7: The primary contact check box should be checked in Acumatica then only you can view the same as a Primary User Admin.

Acumatica

Search

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admin admin

Customers
C000000288 - Facebook

VIEW ACCOUNT

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

SET AS PRIMARY

Active	Contact	Job Title	Primary	Email	Phone 1
<input checked="" type="checkbox"/>	Mark Z		<input type="checkbox"/>	markz@test.com	4444444444

This should be checked

The Primary Check box should be checked.