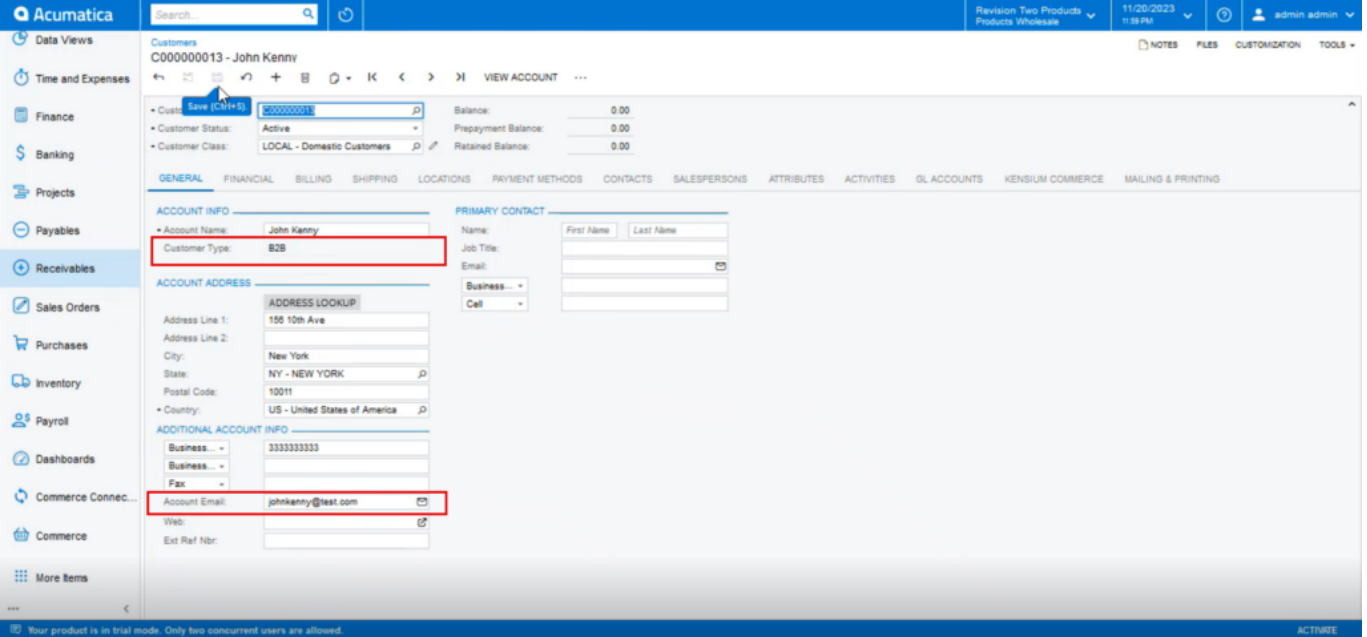


Managing Customer sync from Acumatica to B2B

You can sync the customer from Acumatica to B2B. Follow the steps.

Step 1: Create a Customer within Acumatica. While creating the Customer you must create the Customer type as B2B. Also, the email address is mandatory.



The screenshot shows the Acumatica interface for creating a new customer. The 'Customer Type' is set to 'B2B' and the 'Account Email' is 'johnkenny@test.com'. Red boxes highlight these fields. The form also includes sections for 'Account Info', 'Account Address', and 'Additional Account Info'.

The customer type should be B2B and Account Email is mandatory

Step 2: Click on the [Kensium Commerce] Tab. Upon clicking you need to enable the checkbox for [Enable Kensium Commerce Framework] in the Site Association.

Check the box of the connection Type [KNB] and save the screen.

Acumatica interface showing the setup for Kensium Commerce. The 'Kensium Commerce' tab is selected in the top navigation bar. In the 'SITE ASSOCIATION' section, the checkbox 'Enable Kensium Commerce Framework' is checked. Below it, a table lists site associations with columns: Config Site ID, Active, Connector Type, and Commerce Reference ID. One entry is visible: B2BASTORE, which is active and uses the connector type KNBetaB2B-KNB2B-...

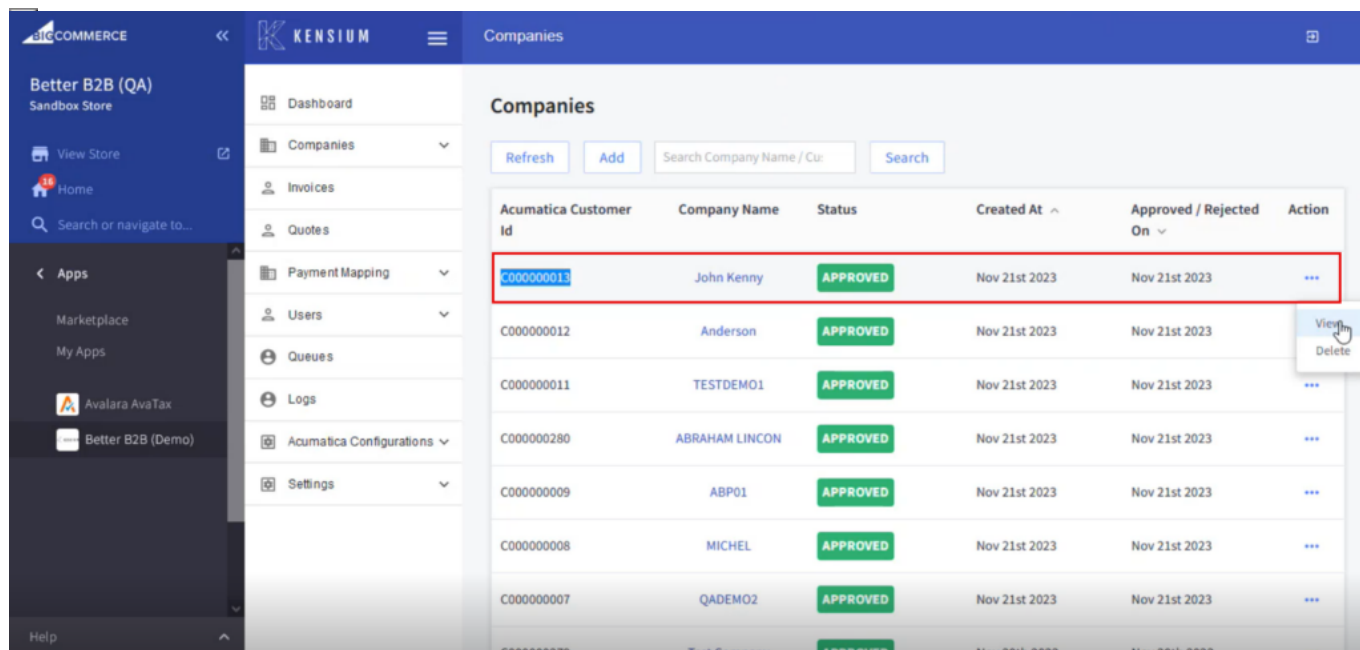
Setting up Kensium Commerce

Step 3: Go to the connector logs under the Reports.

Acumatica interface showing the 'Logs' section. The 'Logs' tab is selected in the top navigation bar. The 'Logs' section displays a table of connector logs. The table has columns: Level, Action Type, Message, Endpoint URL, Description, and Login User. One log entry is highlighted with a red box: Level: INFO, Action Type: Customer Sync, Message: [company_name] 'John Kenny', company_phone '33333', Endpoint URL: https://better2b.kensiumcommerce.com/api/v1/company, Description: Customer data is created/updated successfully, Login User: admin.

Customer Sync Details in the Connector Logs

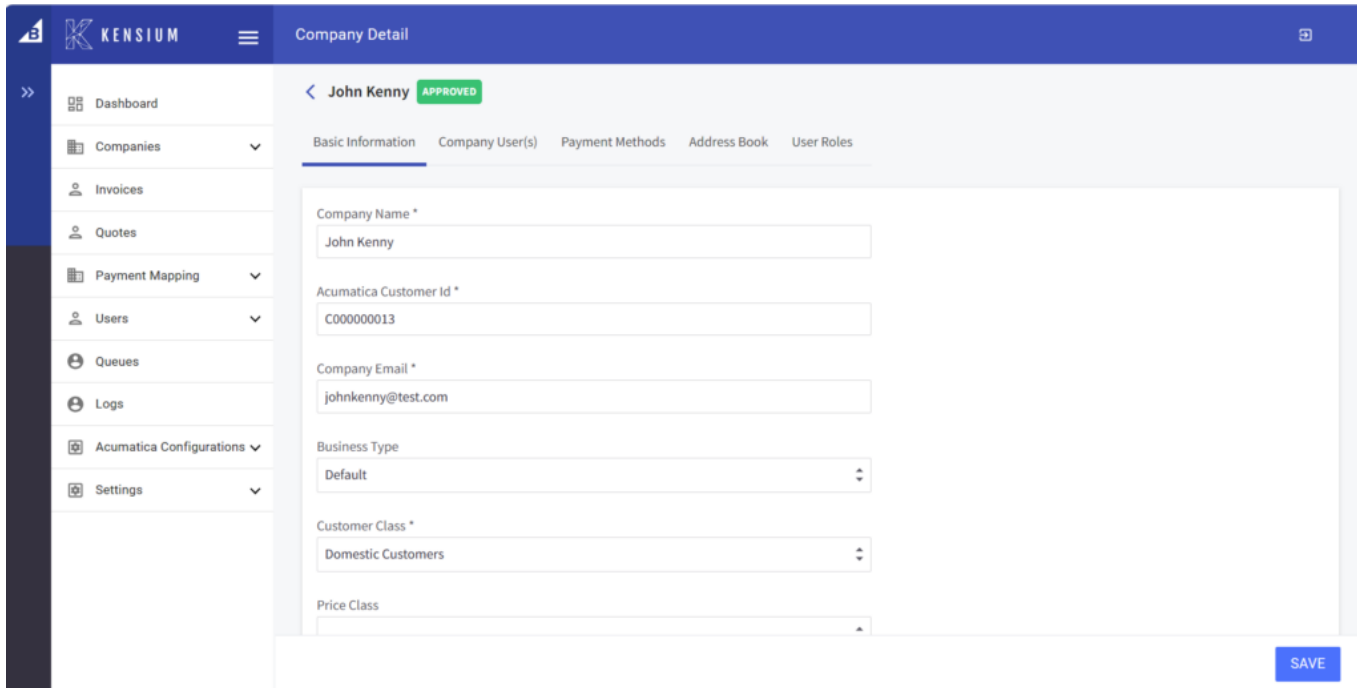
Step 4: Go to the Better B2B and click on the Company.



Acumatica Customer Id	Company Name	Status	Created At	Approved / Rejected On	Action
C000000013	John Kenny	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000012	Anderson	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000011	TESTDEMO1	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000280	ABRAHAM LINCON	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000009	ABP01	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000008	MICHEL	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000007	QADEMO2	APPROVED	Nov 21st 2023	Nov 21st 2023	View
C000000279	Test Company	APPROVED	Nov 20th 2023	Nov 20th 2023	View

Customer synced from Acumatica to Better B2B.

Step 5: Clicking on [View] will give you the details including Basic Information, Company(s) User, Payment Methods, Address Book and User Role.



KENSUM Company Detail

< John Kenny APPROVED

Basic Information Company User(s) Payment Methods Address Book User Roles

Company Name *

John Kenny

Acumatica Customer Id *

C00000013

Company Email *

johnkenny@test.com

Business Type

Default

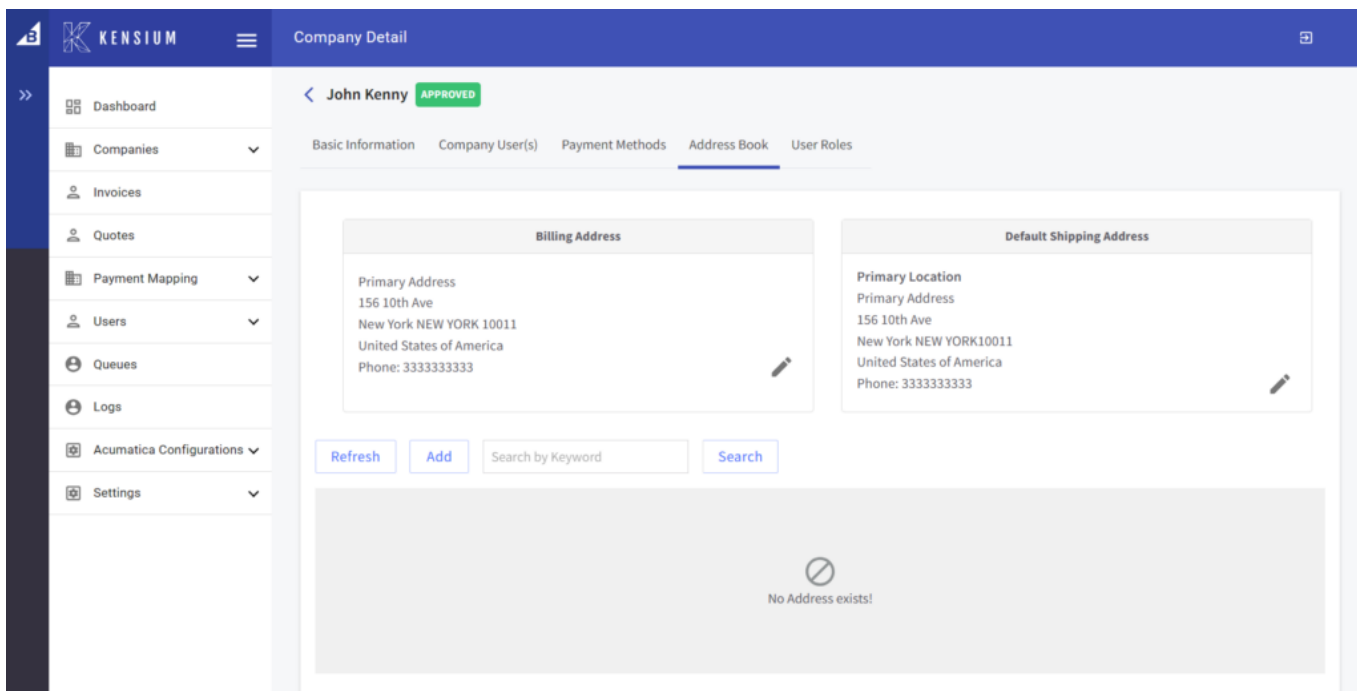
Customer Class *

Domestic Customers

Price Class

SAVE

Basic Information of the Company



KENSUM Company Detail

< John Kenny APPROVED

Basic Information Company User(s) Payment Methods Address Book User Roles

Billing Address

Primary Address

156 10th Ave
New York NEW YORK 10011
United States of America
Phone: 3333333333

Default Shipping Address

Primary Location

Primary Address

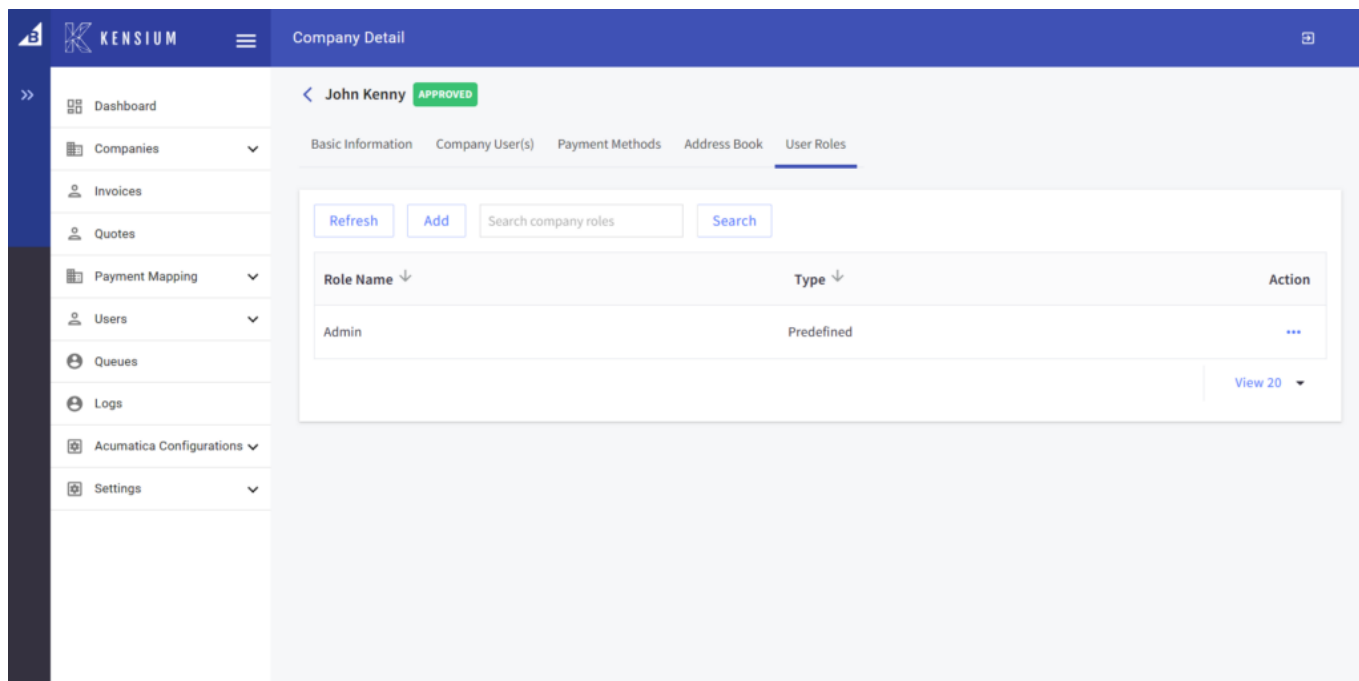
156 10th Ave
New York NEW YORK10011
United States of America
Phone: 3333333333

Refresh Add Search by Keyword Search

No Address exists!

Address Book is already

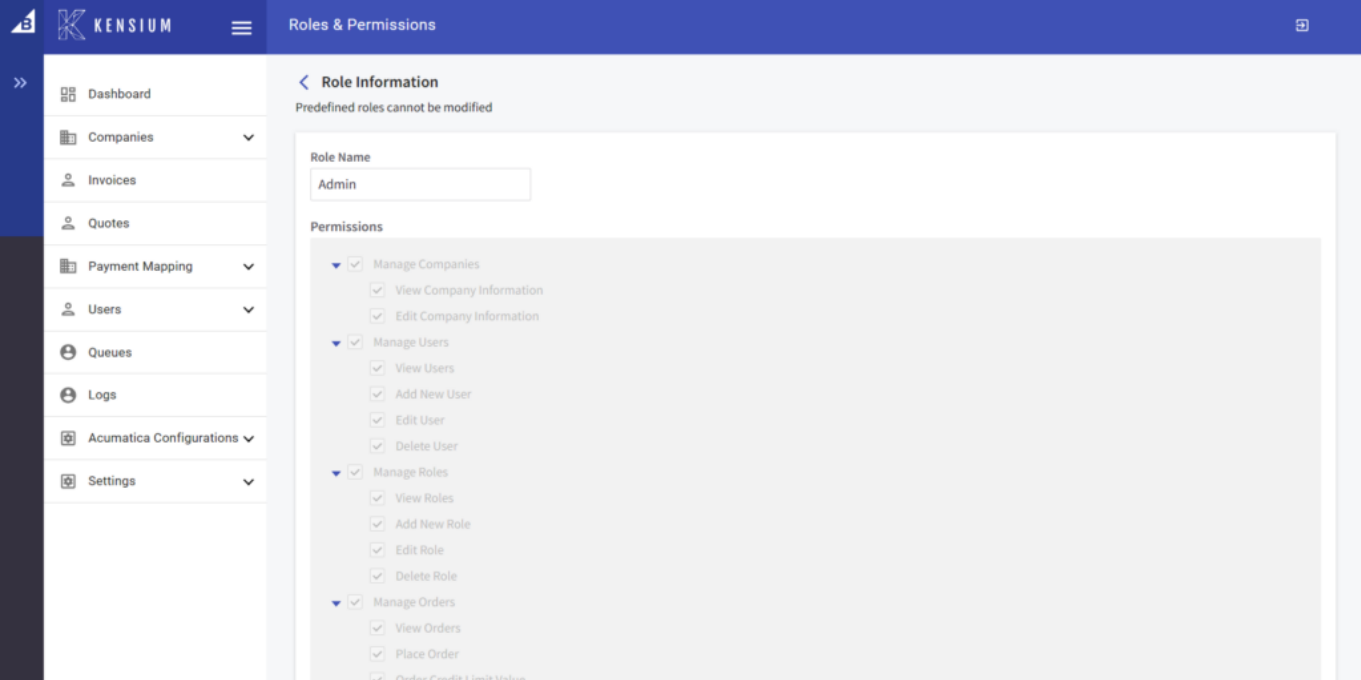
 The user role is a Predefined role.



The screenshot shows the 'Company Detail' page for 'John Kenny' (APPROVED). The 'User Roles' tab is active, displaying a table of roles. The table has columns for 'Role Name', 'Type', and 'Action'. The first row shows 'Admin' as the role name and 'Predefined' as the type. The action column contains a three-dot menu icon. The page also includes a sidebar with navigation links and a top navigation bar.

Role Name	Type	Action
Admin	Predefined	...

The User Role is pre-defined.



KENSUM Roles & Permissions

Role Information
Predefined roles cannot be modified

Role Name
Admin

Permissions

- ☒ Manage Companies
 - ☒ View Company Information
 - ☒ Edit Company Information
- ☒ Manage Users
 - ☒ View Users
 - ☒ Add New User
 - ☒ Edit User
 - ☒ Delete User
- ☒ Manage Roles
 - ☒ View Roles
 - ☒ Add New Role
 - ☒ Edit Role
 - ☒ Delete Role
- ☒ Manage Orders
 - ☒ View Orders
 - ☒ Place Order
 - ☒ Partner Freight Limit Value

View Option in Predefined Role Information.