

Syncing the Quotes in Acumatica

sync the Quotes in Acumatica, you need to follow the steps

Step 1: Go to the B2B and select the Company.

Step 2: Within the company create a user role. If you already have User Roles, then you can use that. For explanation, we are creating another issue.

	«	Dashboard	Add Company User
Better B2B (QA)		Companies ~	
Sandbox Store		Invoices	ramu@test.com
View Store		2 Quotes	Role*
Home		Payment Mapping	DEMO
Q Search or navigate to		_ Users ✓	First Name * 0
< Apps	Î	A Queues	Ramu
Marketplace		0 100	Last Name *
My Apps		e Logs	A 🗸
_		Acumatica Configurations ~	Phone Number *
🙏 Avalara AvaTax	-	🟚 Settings 🗸 🗸	4566677777
Better B2B (Demo)			Quote Approval Limit *
			0
			Quote Approval Period *
			Per Week
			Success! Company User Created Successfully. x
			CANEL CANEL
Help			CANCEL SAVE

Adding Company User

Step 3: Under User Management the **[User]** should be displayed.





8	Your store is down for maintenance.	Click here to see what your visito	rs will see. 🗹			Design this page in Page Builder
			User M	anagement		
	Orders	Invoices Quotes My Quote	Messages (0) Recently Vie Company	wed Account Settings F Details Sign out	Roles & Permissions Addresses	User Management
	View 20 👻					ADD NEW USER
	Name	Em	ail	Role		Action
	shreyas iyer	shreyas@	test.com	Primary Admin		Edit
	Ramu A	ramu@tr	st.com	DEMO		Edit Jm
	Prev					Next
	Navigate	Categories	Popular Brands	Info	Subscribe to our newslette	r
	Shipping & Retu Contact Us	Garden	OFS Common Good	3112 Scotchmere Dr Call us at 0519401677	Get the latest updates on new	products and upcoming

User displayed under User Management

Step 4: Login with the newly created user. Select a Product and click on add to [Quote].

3 Your store is down for maintenance. O Click here to see what your visitors will see.	Edit product information
	Quantity: Image: Add to Cart Add to Quote Add to Wish List V
Description	
Volume 13 of Smith Journal is crammed with more than its fair share of sharp minds. To thing he'd ever come across - a great skill to have when it came to party tricks, but eno https://cdn11.bigcommerce.com/s-5xiq1sd86k/images/stencil/1280x1280/products/111/371/smithjournal1.1611725093.jpg?c=	p of the list would have to be Solomon Shereshevsky, who remembered every single gh to send him crackers. And then there's Delbert Trew who spends more time than you 1 Samuel Morse, either, who was a famous portrait painter before he gave his name to





Your store is down for maintenance. Click here to see what your visitors will see.	Edit product information
	[Jampie] Jimin Journal 13
and the second se	\$140.26
smith	★★★★★ (No reviews yet) Write a Review
JOURNAL ACTION	SKU
THE REPORT OF TH	SM13
	Beer Stvle:
Product(s) added	OK to Quote Add to Wish List

Select the Product and click on Add to $\ensuremath{\textbf{Quote}}$

Confirmation Message

Step 5: Go to My Accounts and click on My Quotes. In the My Quote section, you can add and create a quote.





ur store is down for maintenance. O Clic	k here to see what your visitors	will see. 🗹	,				Design this page i	n Page Buil
			Company Detai	ls Sign out				
My Quote								
				Choose Shipping Add	ress		~	
Address Line-1				Select a Country			~	
Address Line-2								
				Phone Number				
	I							
Line Items								
Line Item	Title	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action	
O (Sar	nple] Smith Journal 13 SM13	1 0	\$ 140.26	\$ 1400	\$ 0.0 0	\$ 140.26		
						Quete Tel	01. 2140.00	

Quote creation Form

If you have already added the quotes, then you can see the details under the line items.

Line Items							
Line Item	Title	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action
0	[Sample] Smith Journal 13 SKU: SM13	1	\$ 140.26	\$ 1400	\$ 0.0 0	\$ 140.26	

Line Items Details

Step 6: Once you complete all the details click on [Submit Quote].





Your store is down for	maintenance.	Click here to see what your visitors	will see. 🗹					Design this	page in Page Builder	^	-
	Address Line				79414						
	Lubbock				(562) 594-9955						
	TEXAS			~							
	Line Items										
	Line Item	Title	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action			
	10	[Sample] Smith Journal 13 SKU: SM13	1 [0]	\$ 140.26	\$ 50 0	\$ 10 0	\$ 140.00	D			
							Quote Tot	al: \$150.00			
			D₂.				Discount To	otal: \$10.00			
							Grand Tot	al: \$140.00			
				Submit	Ouete						
			1	Submit	Quote						
											į

Click on submit a quote

Your store is down for maintenan	ce. Click here to see what your visitor	rs will see. 🗹					Design this	page in Page Builder 🔨 🔨
		0	Company Details	Sign out				
My Que	ote							
TEST				6002 Slide Rd Lubboc	k TEXAS US 79414		~	
6002 S	lide Rd s Line-2		E	\supset			~	
Lubboc	*	q)uote (Succe	Created				
Line Iter	ems Treb	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action	
0	[Sample] Smith Journal 13 SKU: SM13	1 10	\$ 140.26	\$ 50.0	\$ 10 0	\$ 140.00	Ê	
	_					Quote Tot	al: \$150.00	_

Successful Quote Creation





Step 7: On the Quote List you will be able to view the quote.

Your store is down for main	intenance. Click	there to see what your	visitors will see. 🛙					Design this page in Page Builder	^
				Quot	es List				
	Orders Invo	oicas Quotes My C	Quote Messages (C)) Recently Viewer Company Det:	d Account Settings R ails Sign out	toles & Permissions	Addresses User Mana	gement	
	Search By Keyword		Q. TFilter					View 20 👻	
	Quotes								
Qu	uote Number	Order Number	Created By	Date Created	Last Update	Expiration Date	Status	Action	
			Ramu A	22nd Nov 2023	22nd Nov 2023	22nd Nov 2023	Pending for Approval	1	
	Prev				1		~	Next	
Na	avigate	Categories	Popula	ar Brands	Info	Subscribe to ou	r newsletter		
Sh Co	hipping & Returns	Shop All	OFS	an Good	3112 Scotchmere Dr Call us at 05194016774	Get the latest upo	lates on new products and	d upcoming	

Quote displayed in the Quote List

Note, that this user doesn't have the quote approval. So, the Quote Number and the Order Number appear blank.

Admin can approve the [Quote Approval Limit].





			Quot	es List			
Orders	Invoices Quotes M	y Quote Message	s (0) Recently Viewe Company Det	d Account Settings tails Sign out	Roles & Permissions	Addresses User Man	agement
Search By Keywo		Q					View 20 💌
Quotes	Pending For Approval						
Quote Number	Order Number	Created By	Date Created	Last Update	Expiration Date	Status	Action
		Ramu A	22nd Nov 2023	22nd Nov 2023	22nd Nov 2023	Pending for Approval	ູ່ໃຫ
QT10000001	QT10000001	shreyas lyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	APPROV (re I
QT0000126	QT0000126	shreyas iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Cor VIEW	I
		shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	DELET	E I
Prev			_	1			Next

			Quot	es List				
Orders	Invoices Quotes M	y Quote Messag	es (0) Recently Viewe Company Det	d Account Settings ails Sign out	Roles & Perm	issions	Addresses User Manag	ement
Search By Key Quotes	word Pending For Approval	Q	(i)				iew 20 💌
Quote Number	Order Number	Creat	Are you sure you wa	nt to approve the que	ote?	Date	Status	Action
		Ram	Approve	Cancel	2	023	Pending for Approval	I
QT10000001	QT10000001	shreyas iyor	ZISL NUV ZUZO	2151 1904 2023	ZISC NUV 20	023	Open	I.
QT0000126	QT0000126	shreyas lyer	21st Nov 2023	21st Nov 2023	21st Nov 20	023	Completed	I
		shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 20	023	Open	I

Upon approval, you will be able to view the following screen. On successful sync, the quote number will appear.





Your store is down for m	naintenance. 👩	Click here to see what yo	ur visitors will see. I	2				Design this page	in Page Builder 🔷 🔨
				Quot	tes List				
	Orders	Invoices Quotes M	y Quote Message	s (0) Recently View Company De	ed Account Settings tails Sign out	Roles & Permissions	Addresses User Manag	(ement	
			۹.			_		/iew 20 👻	
	Quotes	Pending For Approval			\checkmark				
	Quote Number	Order Number	Creat	You have success	fully updated the quo	Date	Status	Action	
			Ram		ОК	2023	Pending for Approval	1	
c	QT10000001	QT10000001	shreyas iyer	215L NOV 2023	21St NOV 2023	215t NOV 2023	Open	1	
c	QT0000126	QT0000126	shreyas lyer	21st Nov 2023	21st Nov 2 23	21st Nov 2023	Completed	1	
			shreyas lyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	1	

Step 8: Go to the Acumatica Sales Order Screen. The quote order will sync into the Acumatica Sales Order.

Acumatica	Search	ৎ গু								Revision Products	Two Product Wholesale	⁸ ✔ 11/2 11.26	1/2023 PM	• 0 .	💄 admin i	admin 🗸
W Material Requireme	Sales Orders	Custa									NOTES	ACTIVITIES	FLES (CUSTOMIZATION	TOOLS -	Ξī
🕐 Time and Expenses	6 2 B 0	+ 8 0 - к	< > >	REMOVE	HOLD											Details
Finance	Order Type: Order Nbr.: QT0000	ρ • Customer: 1105 ρ • Location:	C000000212 - QT MAIN - Primary L	Custa	р / р /	Ordered Qty: Discount Tota	1.00 at: 0.00								^	
\$ Banking	Status: On Hold • Date: 10/16/2	d Contact: 023 - Currency:	Qtontaa aq USD ,P 1.00	* VIEW	P P BASE	VAT Exempt 1 VAT Taxable 1	r 0.00									
Payables	Requested On: 10/16/2 Customer Or	022 - Project:	X - Non-Project Co	ode.	0	Tax Total: Order Total:	0.00									
Receivables	External Ref	Description:														
Sales Orders	DETAILS TAXES	COMMISSIONS FINANC	IAL SHIPPING	ADDRES	SES (DISCOUNTS	SHIPMENTS PAYMENTS	RELATIONS	TOTALS							
R ChannelAdvisor	C + A X	ADD ITEMS ADD MATR	Related	Substituti	Free Vi	ULS POLINK	Line Description	MOU*	Quantity	Gty On	Open Qity	Unit Price	Manual	Ext. Prior	Disci	
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D Inventory																
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Commerce Connec																
Commerce																
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More Rems	<														>	
<	On Hand 871.00 EA, Avail	able 842.00 EA, Available for	Shipping 852.00 l	EA												<

The quote will be synced to the Acumatica Sales Order





Step 9: Select the Quote and click on [Copy Order].

Acumatica	Search	٩ ئ				N			Revision Products 1	Two Product Wholesale	⁸ ✔ 11/2 11:27	21/2023 PM	• 0	💄 admin	admin 🗸
Haterial Requireme	Sales Orders QT QT000800 - Bras	ss Key Bar								NOTES	ACTIVITIES	FLES	CUSTOMIZATION	TOOLS +	=1
Time and Expenses	6 Ξ Ξ Λ	+ 8 0 - к	< > >I	COPY ORDER	HOLD										Details
Finance	Order Type: Order Nbr.: QT0000		BRASSKEY - Brass H MAIN - Primary Local	Key Bar ,0 tion ,0	Ordered Qt; Discount To	y:: 15.00 stal: 0.00								Â	
\$ Banking	Status: Open • Date: 1/19/20	Contact: 223 • Currency:	Emeast Reinhold USD ,P 1.00	P VIEW BASE	VAT Exempl VAT Taxable	t T 0.00									
Payables	Requested On: 2/18/20 Customer Or BRASS	• Project: SKEY2t	X - Non-Project Code	Q	 Tax Total: Order Total: 	0.00 7,125.00									
Receivables	External Ref	Description:	Laptop computer quot	te											
Sales Orders	DETAILS TAXES	COMMISSIONS FINAN	CIAL SHIPPING	ADDRESSES	DISCOUNTS	SHIPMENTS PAYMENTS	RELATIONS TOTAL	LS							
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<	On Hand 967.00 EA, Avail	lable 849.00 EA, Available fo	r Shipping 859.00 EA										K K	> >	<

Click on Copy Order

Step 10: Upon clicking on the [Copy Order] you will get a pop-up on the screen. This process will convert the Quote to a Sales Order in Acumatica.





Acumatica	Search Q 🖸	Revision Two Product Products Wholesale	• 11/2 11.27	1/2023 PM	0	admin admin 🗸
H Material Requireme	Sales Orders QT QT000800 - Brass Key Bar	D NOTES	ACTIVITIES	FLES CUS	TOMIZATION	TOOLS * =1
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\$ Banking	Status: Open Contact Emeast Reinhold ρ W/ W/ Exempt T. 0.00 • Date: 1/15/2023 ∨ Currency: USD .ρ. 1.00 • VEW BASE W/ Taxable T. 0.00					
Payables	- Requested On: 215/2023 - - Project: X - Non-Project Code. ρ σ" Tax Total: 0.00 Customer On. BRASSKEY21 Onder Total: 7.125.00					
Receivables	External Ref. Descripton Laptop computer quote Copy To X					
Sales Orders	DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCO +Order Type: SO p					
R ChannelAdvisor	C + / X ADD ITEMS ADD MATRIX ITEMS ADD INVOICE LINE DETAILS Criter Nor: Criter Nor: Criter Nor: Criter	Oti Da Dava Oti	Linit Price	Martine	Fut Price	Date
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Kensium License						
III More Rems	¢					>
••• <	On Hand \$67.00 EA, Available 548.00 EA, Available for Shipping 858.00 EA					> K

Copy to option

Step 11: After completing the process, the quote status will be in completed status. You can convert the quote to order from the B2B side also. By clicking on the Action button, you will get the option.

Reject
Edit
Convert Order
View
Delete
Cancel

click on Convert Order

Step 12: Based on any of the quote's status in Acumatica it will be reflected in B2B.



BigCommerce B2B Connector

Step 13: If you [Convert Order] after syncing with Acumatica, the following screen will appear on the front end of B2B.

Your store is down for	r maintenance. 👩	Click here to see w	hat your visitors wi 6002 Slide Rd	li see. 🖸	Design this page in Page Builder	^
	Billing	shreyas lyer	Lubbock TEXA	S United States of America		
			79414			
			6002 Slide Rd			
	Shipping	shreyas lyer	Lubbock TEXA	S United States of America		
			79414			
	Message					
				Are you sure you want to convert this Quote to Order?		
				SURE Cancel	A	
				ADD MESSAGE CONVERT ORDER		
_						
	Marianta	Catalog	100	Bassily Bassily 1974	- hooff-reaction - the second second	

Customer shreyas@test.com	Sign Out	Order Summary	Edit Cart
2 Shipping		1 Item Image Coming Soon	\$500.00
3 Billing	N	Subtotal Shipping Tax Coupon/Cift Certificate	\$500.00 \$47.50
Payment	99 10	Total (USD)	547.50





Note, that it's a bi-directional sync. If you create the quote, it will be synced to B2B and vice versa.

×

