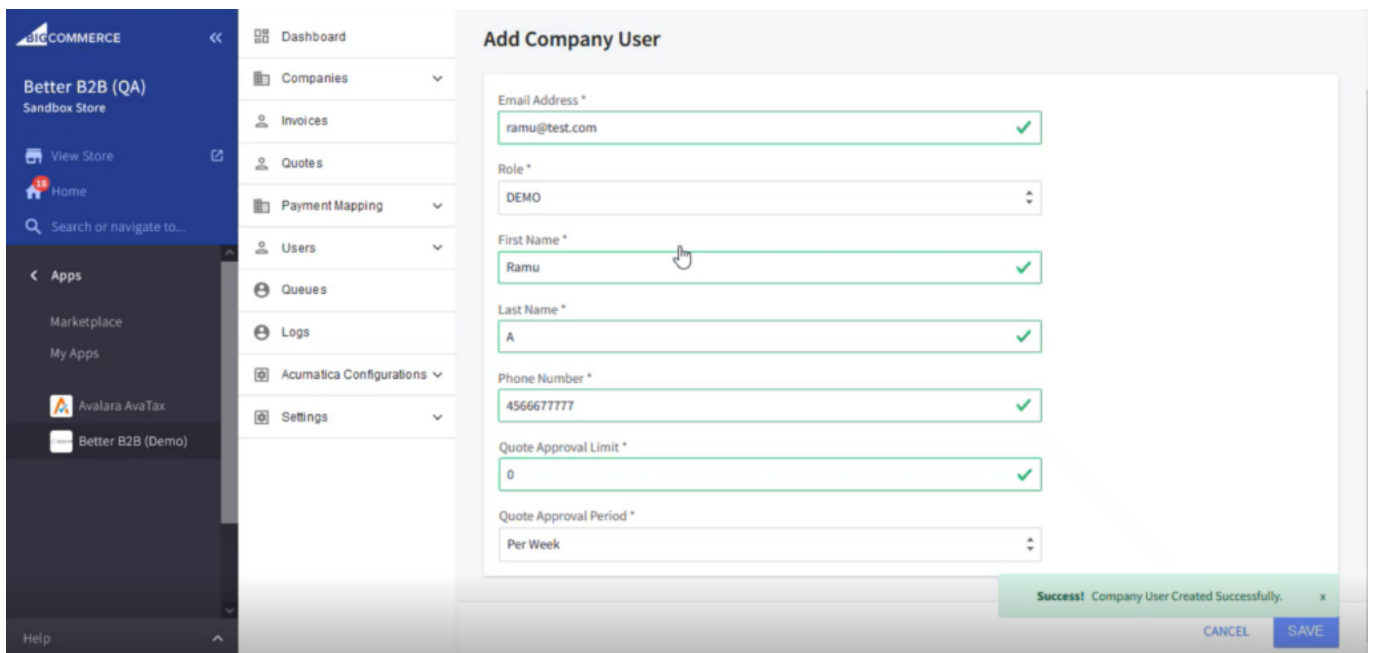


Syncing the Quotes in Acumatica

To 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.



The screenshot shows the 'Add Company User' form in the Acumatica interface. The form is titled 'Add Company User' and contains several input fields, each with a green checkmark indicating successful validation. The fields and their values are: Email Address * (ramu@test.com), Role * (DEMO), First Name * (Ramu), Last Name * (A), Phone Number * (456667777), Quote Approval Limit * (0), and Quote Approval Period * (Per Week). At the bottom right of the form, there is a green success message: 'Success! Company User Created Successfully.' with a close button (x) and two buttons: 'CANCEL' and 'SAVE'.

Adding Company User

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

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User Management

Orders Invoices Quotes My Quote Messages (0) Recently Viewed Account Settings Roles & Permissions Addresses **User Management**
Company Details Sign out

View 20 ADD NEW USER

Name	Email	Role	Action
shreyas Iyer	shreyas@test.com	Primary Admin	Edit
Ramu A	ramu@test.com	DEMO	Edit Delete


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User displayed under User Management

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






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Quantity:

[Add to Cart](#) [Add to Quote](#)

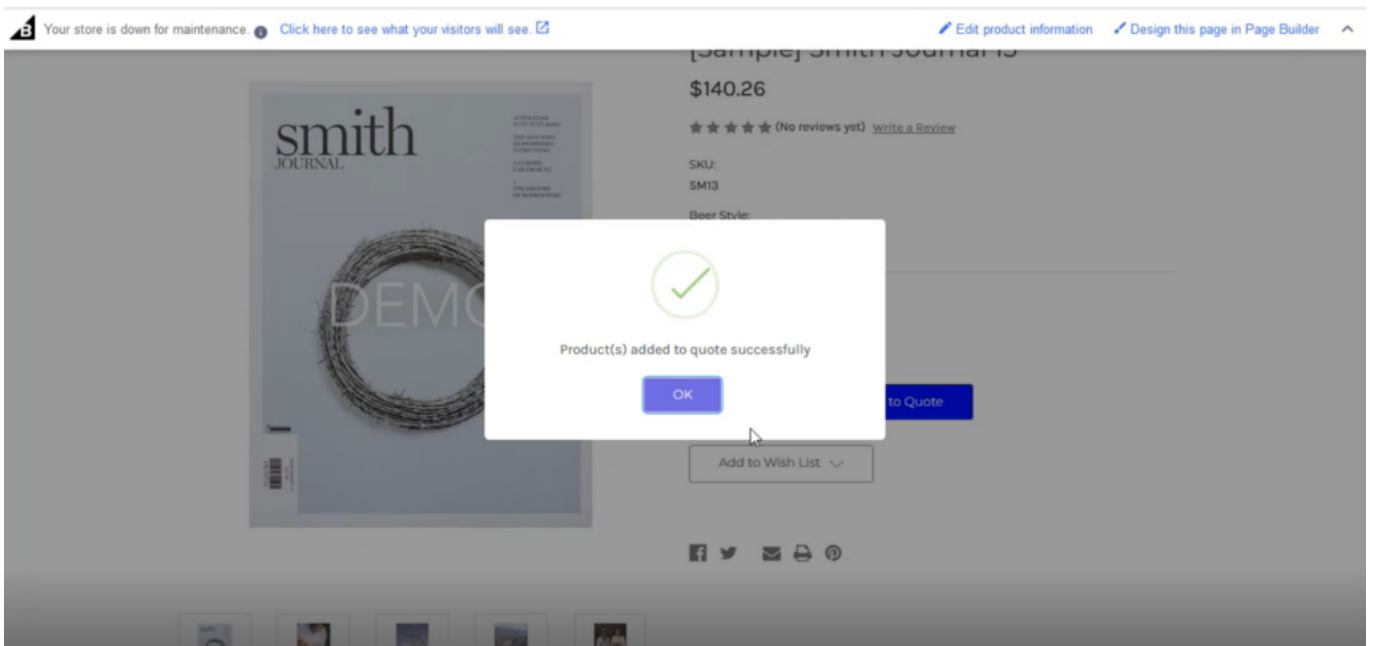
[Facebook](#) [Twitter](#) [Email](#) [Print](#) [Pinterest](#)

Description

Volume 13 of Smith Journal is crammed with more than its fair share of sharp minds. Top of the list would have to be Solomon Shereshevsky, who remembered every single thing he'd ever come across - a great skill to have when it came to party tricks, but enough to send him crackers. And then there's Delbert Trew who spends more time than you <https://cdn11.bigcommerce.com/s-5xiq1sd96k/images/stencil/1280x1280/products/111/371/smithjournal1.1611725009.jpg?c=1> Samuel Morse, either, who was a famous portrait painter before he gave his name to

Select the Product and click on Add to **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.

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Company Details Sign out

My Quote

Quote Title Choose Shipping Address



Address Line-1 Select a Country

Address Line-2 Zip Code

City Phone Number

State

Line Items



Line Item	Title	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action
	[Sample] Smith Journal 13 SKU: SM13	1	\$ 140.26	\$ 140.00	\$ 0.00	\$ 140.26	

Quote Total: \$140.26

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
	[Sample] Smith Journal 13 SKU: SM13	1	\$ 140.26	\$ 140.00	\$ 0.00	\$ 140.26	

Line Items Details

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



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Address Line-2: 79414

Lubbock (562) 594-9955

TEXAS

Line Items

Line Item	Title	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action
	[Sample] Smith Journal 13 SKU: SM13	1	\$ 140.26	\$ 50	\$ 10	\$ 140.00	

Quote Total: \$150.00
Discount Total: \$10.00
Grand Total: \$140.00

[Submit Quote](#)

Click on submit a quote

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Company Details Sign out

My Quote

TEST 6002 Slide Rd Lubbock TEXAS US 79414



6002 Slide Rd

Address Line-2


Lubbock

TEXAS

Line Items

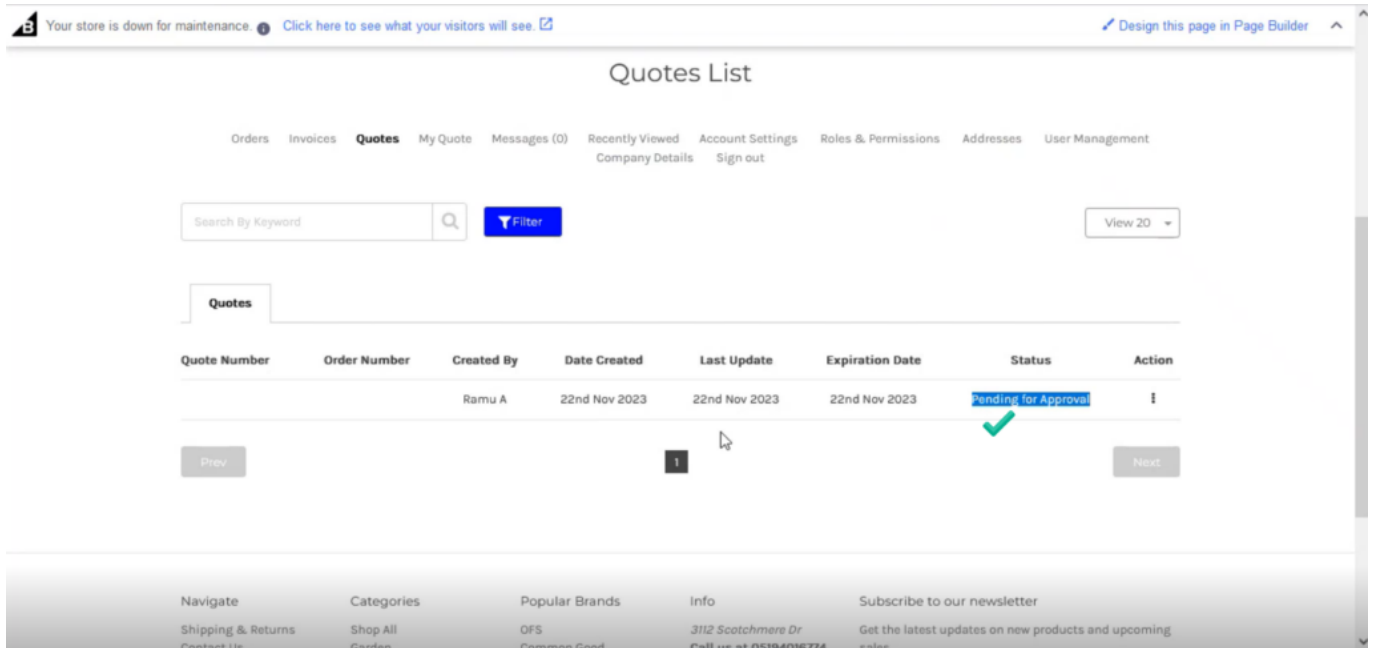
Line Item	Title	Qty	Price	Quoted Price	Discount	Quoted Subtotal	Action
	[Sample] Smith Journal 13 SKU: SM13	1	\$ 140.26	\$ 50	\$ 10	\$ 140.00	

Quote Total: \$150.00


**Quote Created
Successfully**
[OK](#)

Successful Quote Creation

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




Quotes List

Orders Invoices **Quotes** My Quote Messages (0) Recently Viewed Account Settings Roles & Permissions Addresses User Management
Company Details Sign out

Search By Keyword View 20

Quotes

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	

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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].

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Quotes List

Orders Invoices **Quotes** My Quote Messages (0) Recently Viewed Account Settings Roles & Permissions Addresses User Management
Company Details Sign out

Search By Keyword 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	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
QT10000001	QT10000001	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
QT0000126	QT0000126	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Completed	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
		shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>


Prev 1 Next

Quotes List

Orders Invoices **Quotes** My Quote Messages (0) Recently Viewed Account Settings Roles & Permissions Addresses User Management
Company Details Sign out

Search By Keyword View 20

Quotes Pending For Approval

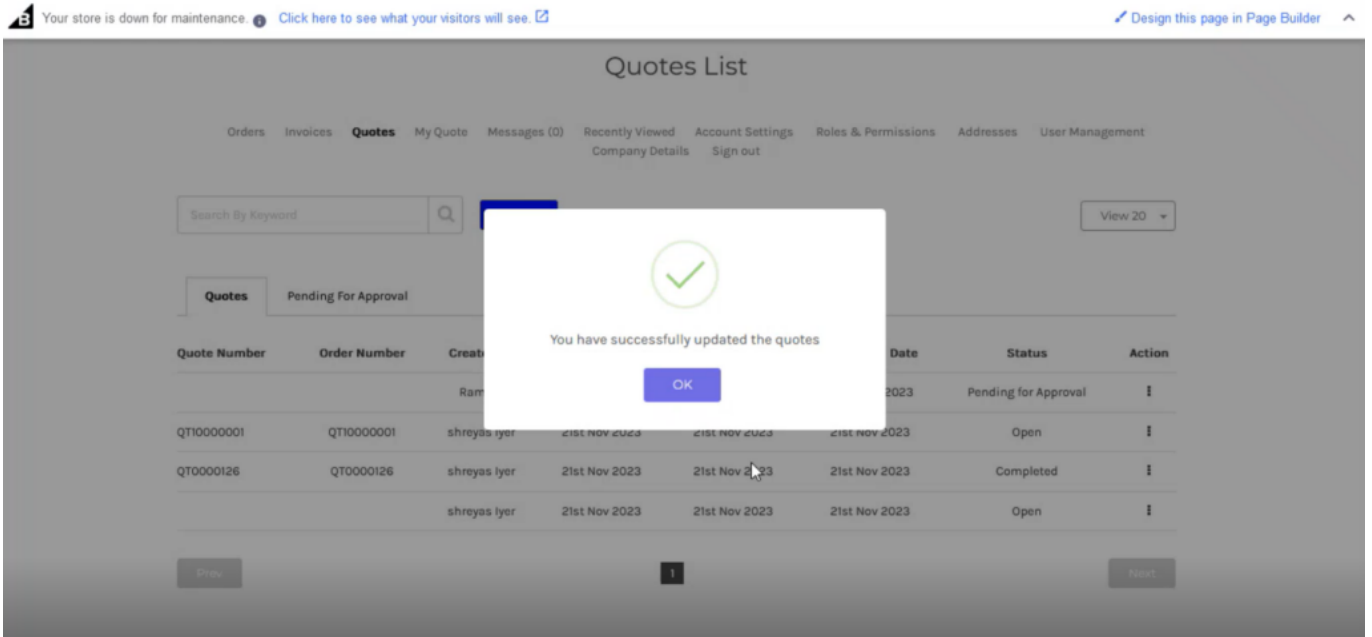


Are you sure you want to approve the quote?

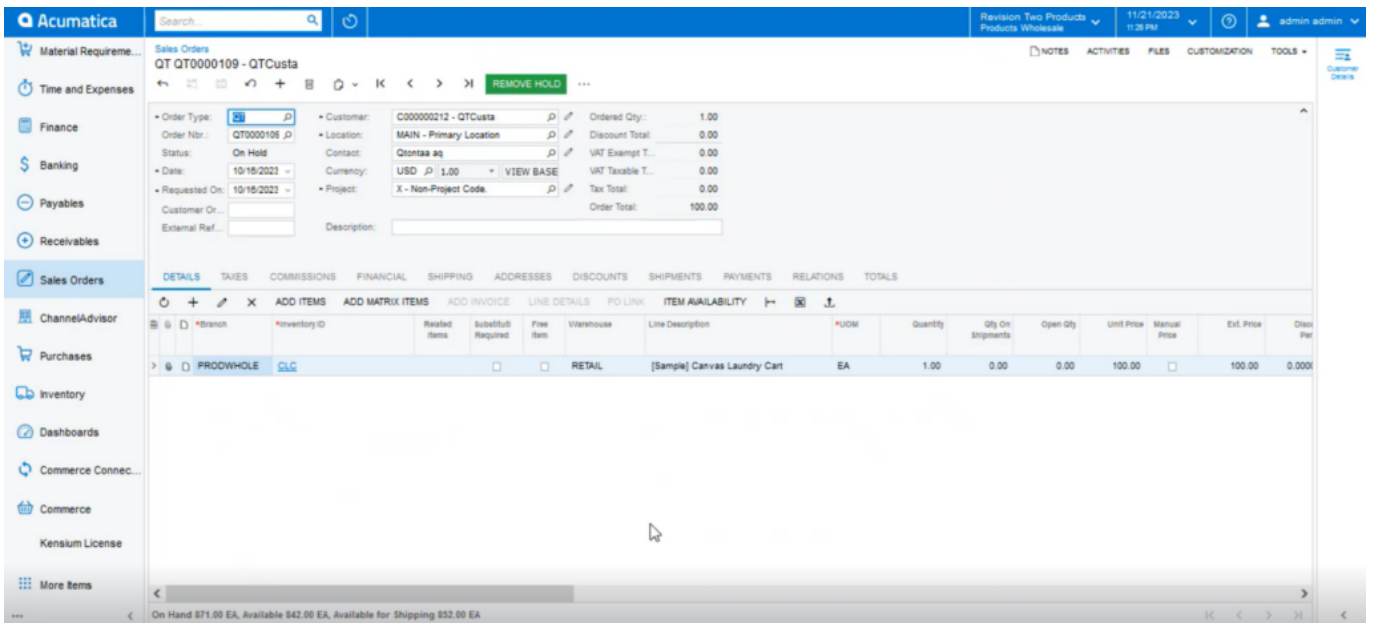
Quote Number	Order Number	Created By	Date Created	Last Update	Expiration Date	Status	Action
		Ramu A	22nd Nov 2023	22nd Nov 2023	22nd Nov 2023	Pending for Approval	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
QT10000001	QT10000001	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
QT0000126	QT0000126	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Completed	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>
		shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	<input type="button" value="APPROVE"/> <input type="button" value="REJECT"/> <input type="button" value="VIEW"/> <input type="button" value="DELETE"/>

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

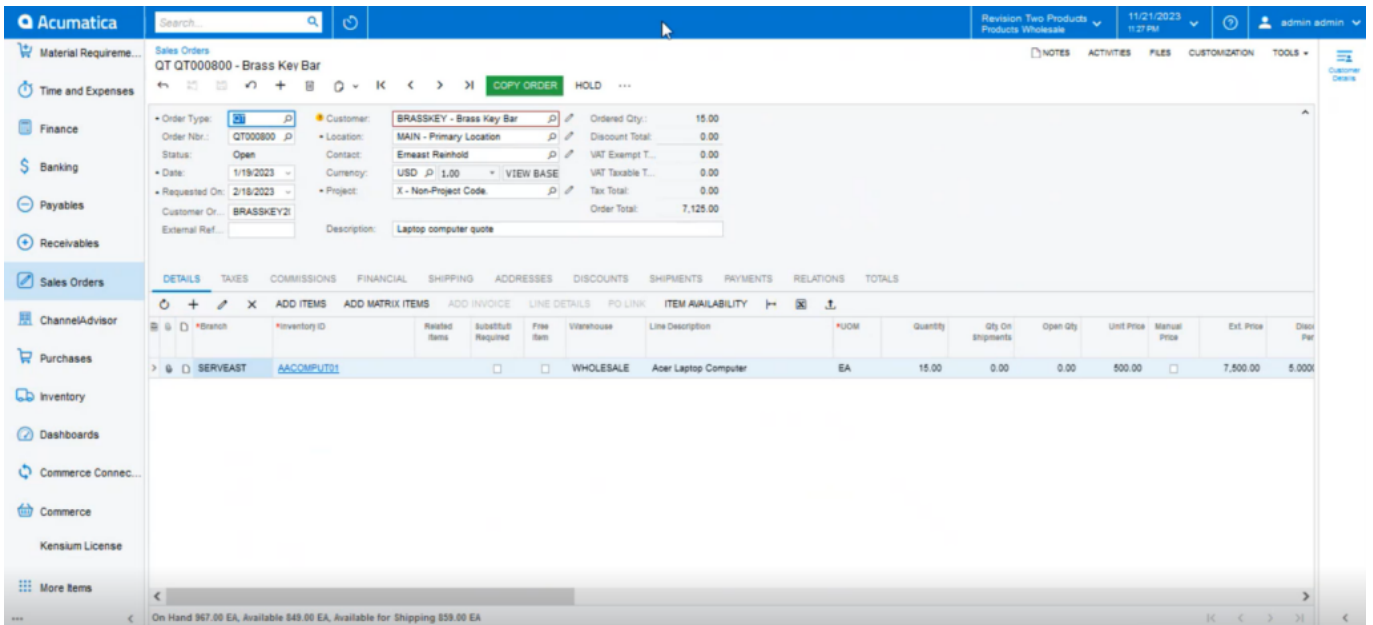


Step 8: Go to the Acumatica Sales Order Screen. The quote order will sync into the Acumatica Sales Order.



The quote will be synced to the Acumatica Sales Order

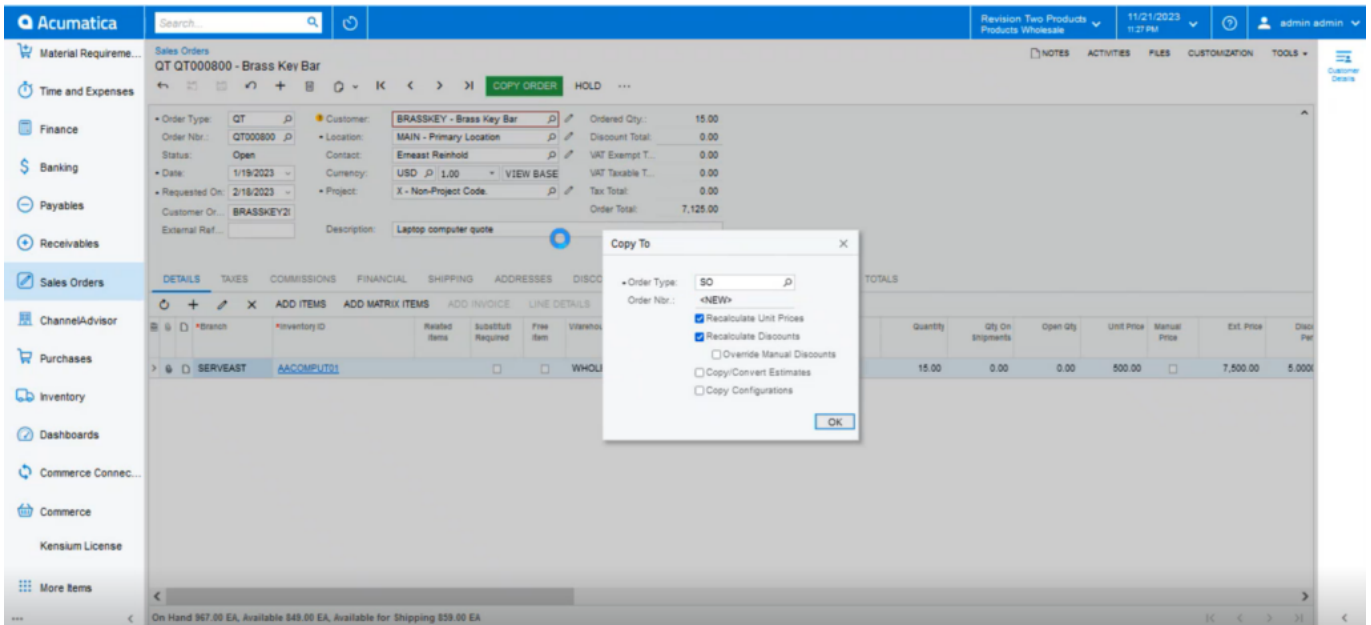
Step 9: Select the Quote and click on [Copy Order].



The screenshot shows the Acumatica interface for a Sales Order. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 11/21/2023 11:27 PM, admin admin). The main content area displays the Sales Order form for 'QT QT000800 - Brass Key Bar'. The 'COPY ORDER' button is highlighted in green. The form includes fields for Order Type, Order Nbr., Status, Date, Requested On, Customer, Location, Contact, Currency, Project, and various totals. Below the form is a table with columns for Branch, Inventory ID, Related Item, Substituted Required, Price Item, Warehouse, Line Description, UOM, Quantity, Qty On Hand, Open Qty, Unit Price, Manual Price, Ext. Price, and Disc. Per.

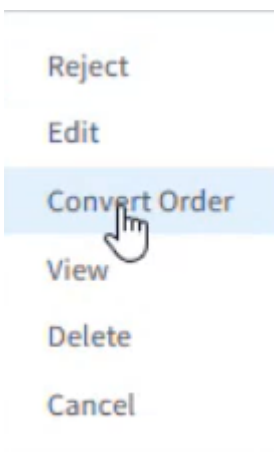
Click on Copy Order

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.



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.

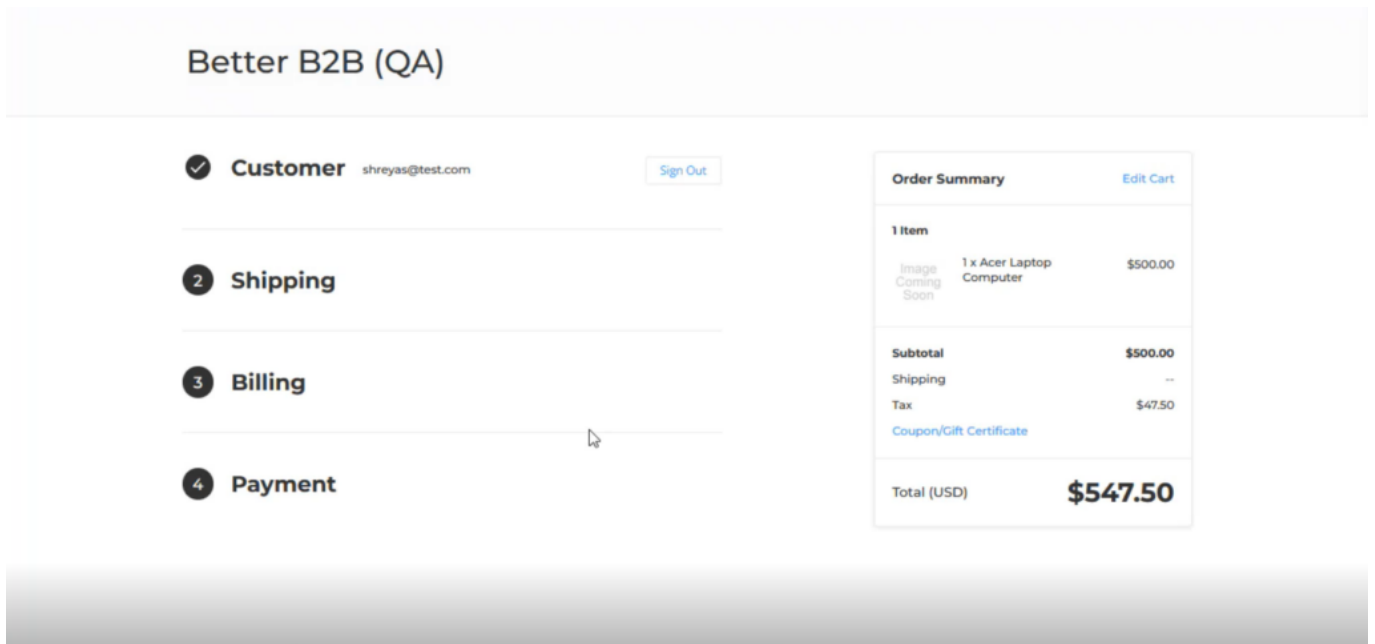
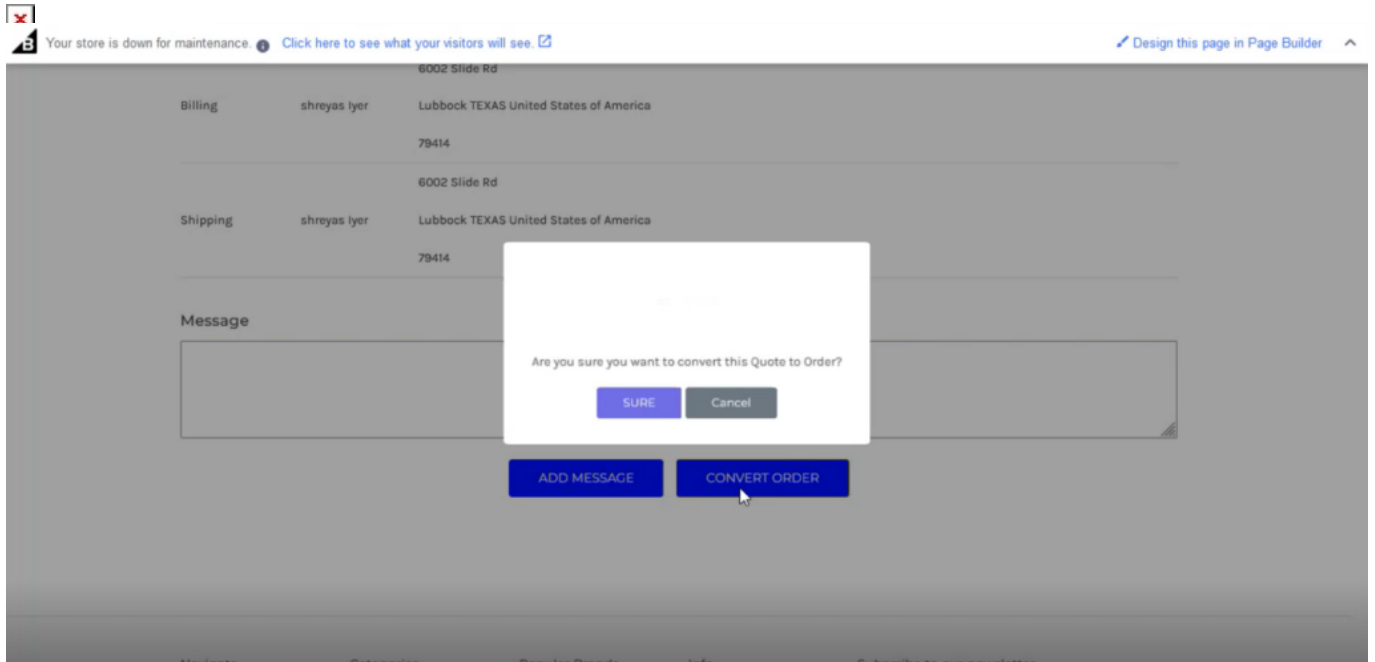


click on Convert Order

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



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



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

