

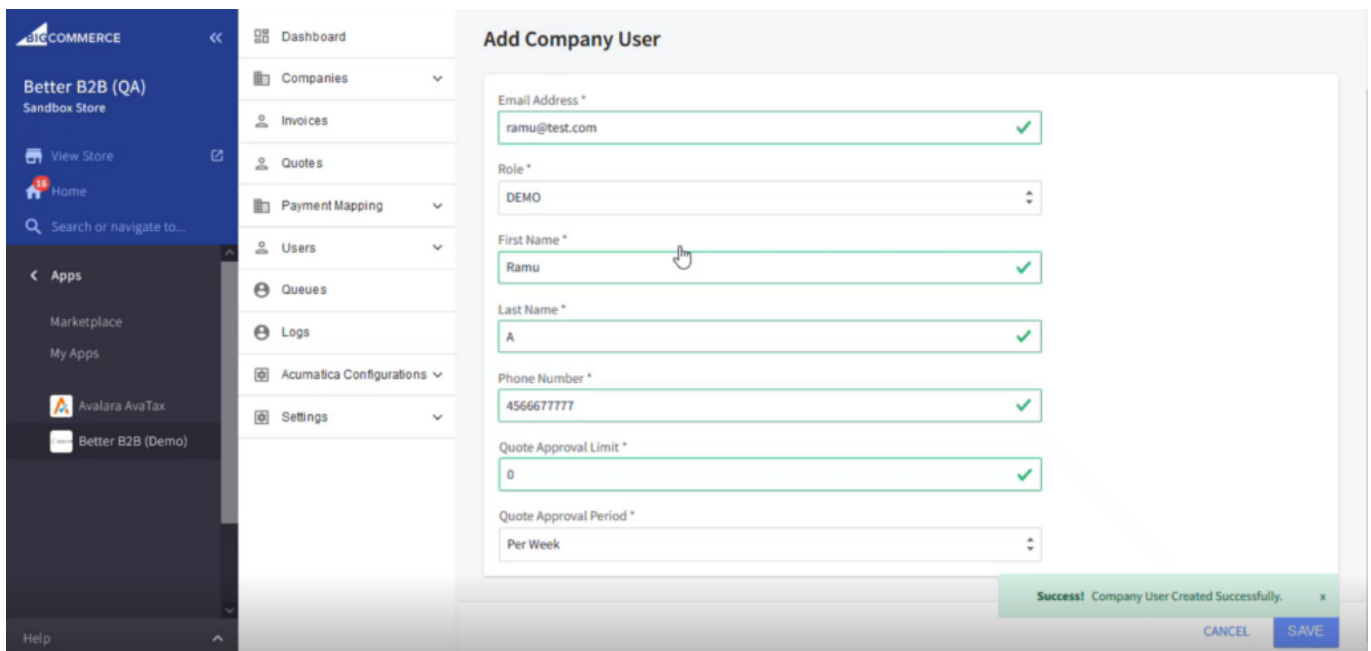
# Syncing the Quotes in Acumatica



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 the following fields:

- Email Address \*: ramu@test.com (checked)
- Role \*: DEMO
- First Name \*: Ramu (checked)
- Last Name \*: A (checked)
- Phone Number \*: 4566677777 (checked)
- Quote Approval Limit \*: 0 (checked)
- Quote Approval Period \*: Per Week

A success message at the bottom right states: 'Success! Company User Created Successfully.' with 'CANCEL' and 'SAVE' buttons.

## 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	<a href="#">Edit</a>
Ramu A	ramu@test.com	DEMO	<a href="#">Edit</a> <a href="#">Delete</a>


[Prev](#) [Next](#)

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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](#)

[Add to Wish List](#)

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

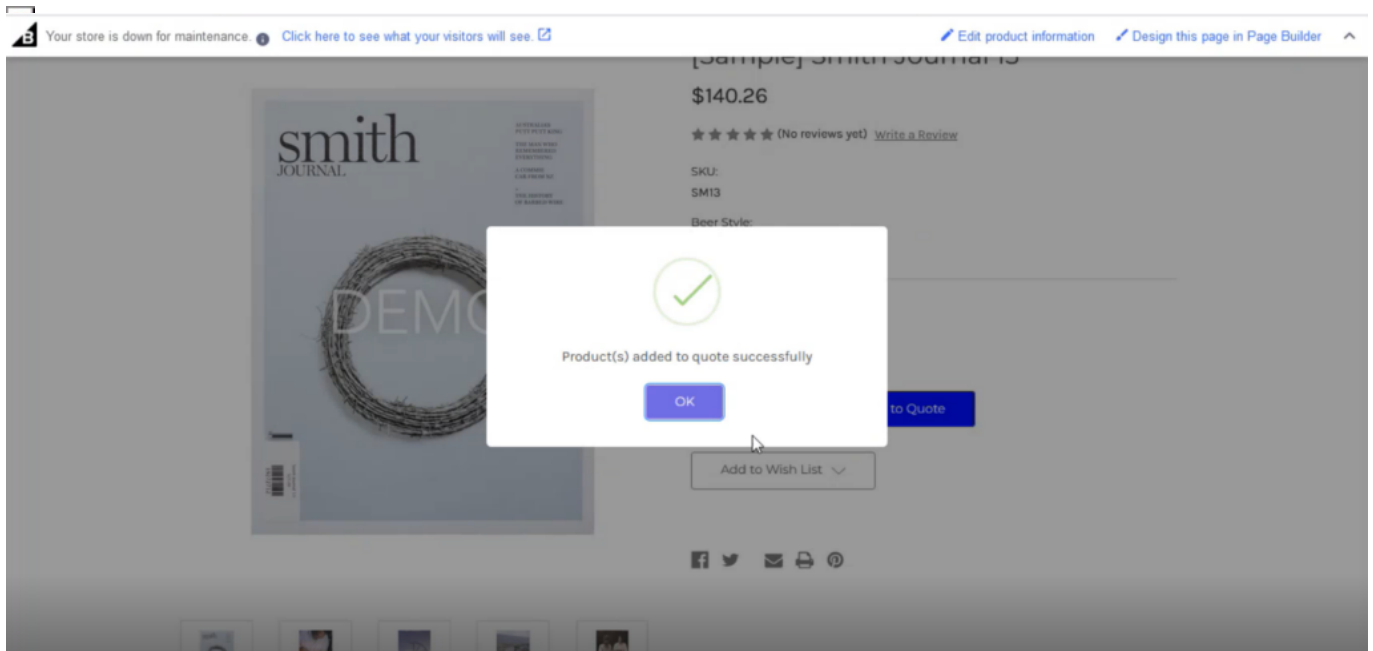
[Image 1](#) [Image 2](#) [Image 3](#) [Image 4](#) [Image 5](#)

**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-5xiq1sd86k/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	\$ 140.26	\$ 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	\$ 140.26	\$ 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	

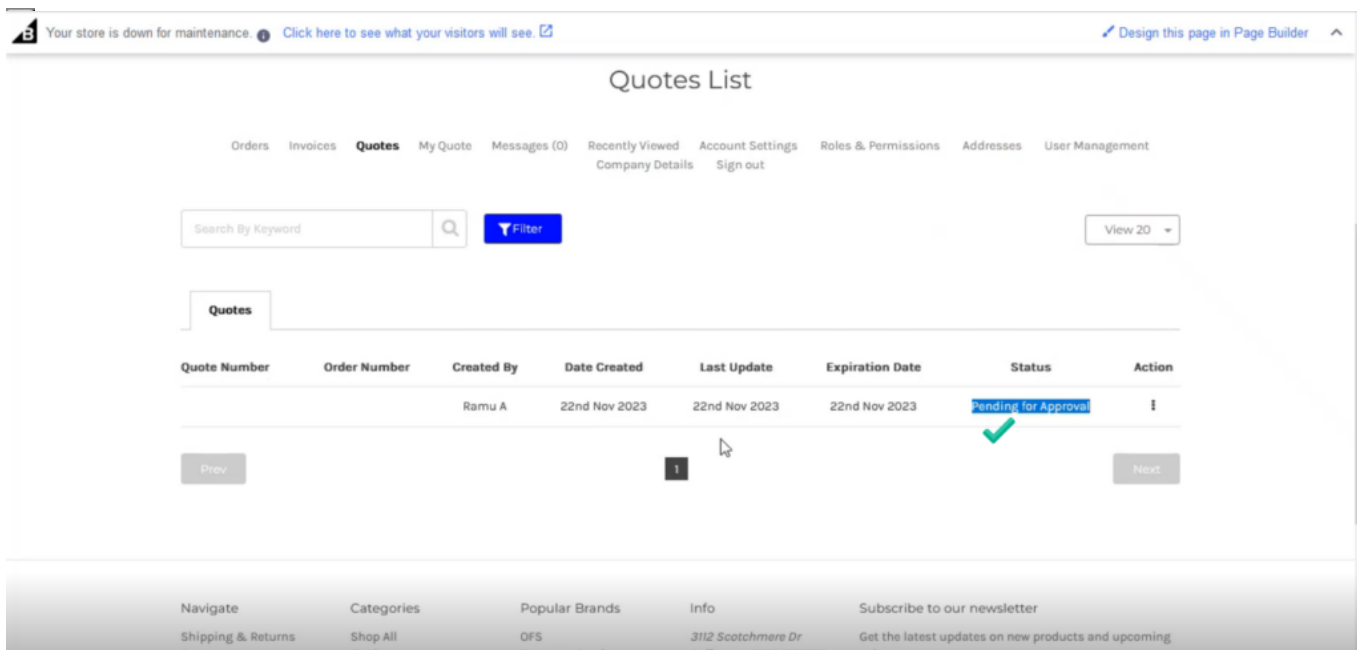
Quote Total: \$150.00

**Quote Created Successfully**

OK

Successful Quote Creation

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





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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

**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 	

Prev 1 Next

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Contact Us Garden Common Good Call us at 05394036774

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	⋮
QT10000001	QT10000001	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	⋮
QT0000126	QT0000126	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Completed	⋮
		shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	⋮

1

## Quotes List

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

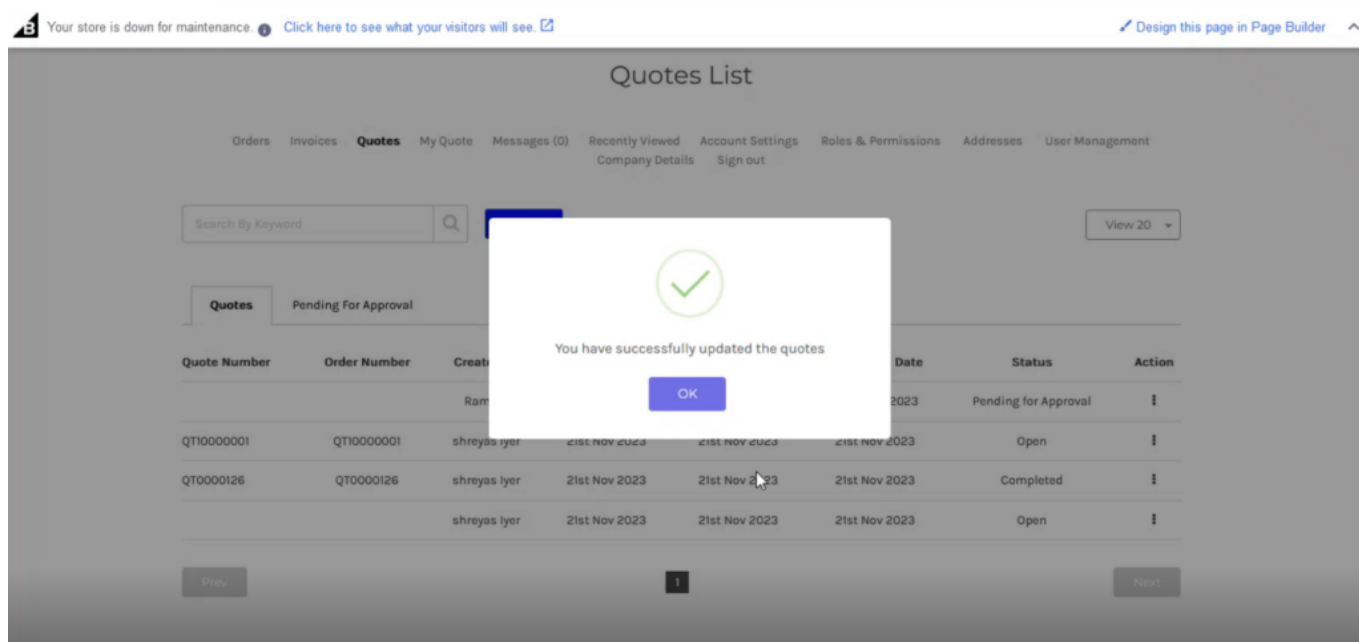
Search By Keyword   View 20

[Quotes](#)
[Pending For Approval](#)

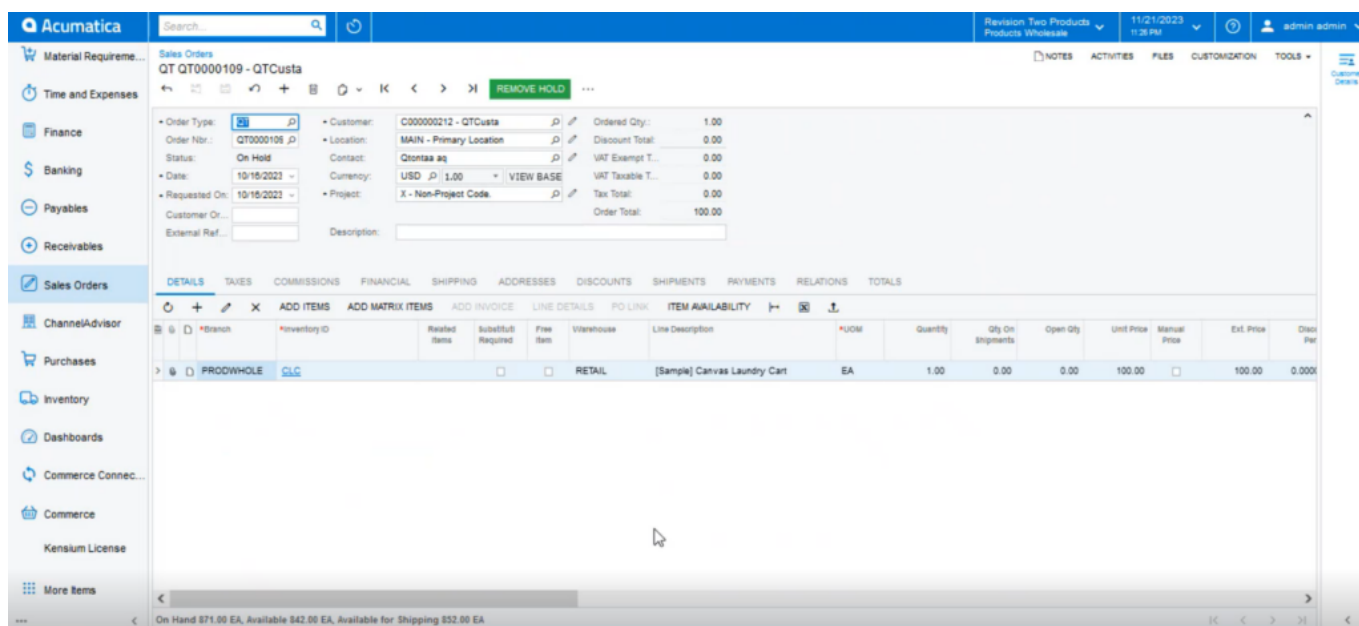
Quote Number	Order Number	Created By	Date Created	Last Update	Expiration Date	Status	Action
		Ramu A	22nd Nov 2023	22nd Nov 2023	22nd Nov 2023	Pending for Approval	⋮
QT10000001	QT10000001	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	⋮
QT0000126	QT0000126	shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Completed	⋮
		shreyas Iyer	21st Nov 2023	21st Nov 2023	21st Nov 2023	Open	⋮

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



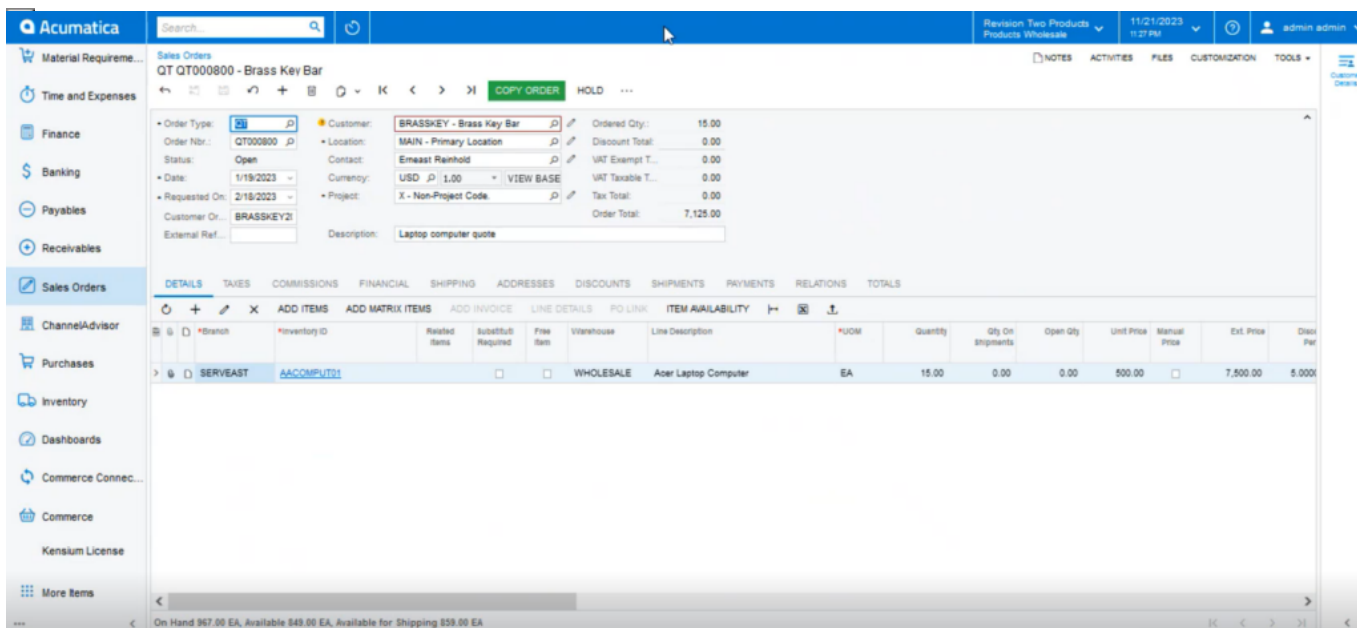
**Step 8:** Go to the Acumatica Sales Order Screen. The quote order will sync into the Acumatica Sales Order.



The quote will be synced to the Acumatica Sales Order



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



Acumatica

Search...

Revision Two Products  
Products Wholesale

11/21/2023  
11:27 PM

admin admin

Material Requirements Planning

Time and Expenses

Finance

Banking

Payables

Receivables

Sales Orders

ChannelAdvisor

Purchases

Inventory

Dashboards

Commerce Connector

Commerce

Kensium License

More Items

QT QT000800 - Brass Key Bar

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

COPY ORDER HOLD

Order Type: **21**

Order Nbr.: QT000800

Status: Open

Date: 1/19/2023

Requested On: 2/19/2023

Customer Or...: BRASSEY21

External Ref...

Customer: BRASSEY - Brass Key Bar

Location: MAIN - Primary Location

Contact: Emmaest Reinhold

Currency: USD 1.00

Project: X - Non-Project Code

Ordered Qty: 15.00

Discount Total: 0.00

VAT Exempt T...: 0.00

VAT Taxable T...: 0.00

Tax Total: 0.00

Order Total: 7,125.00

Description: Laptop computer quote

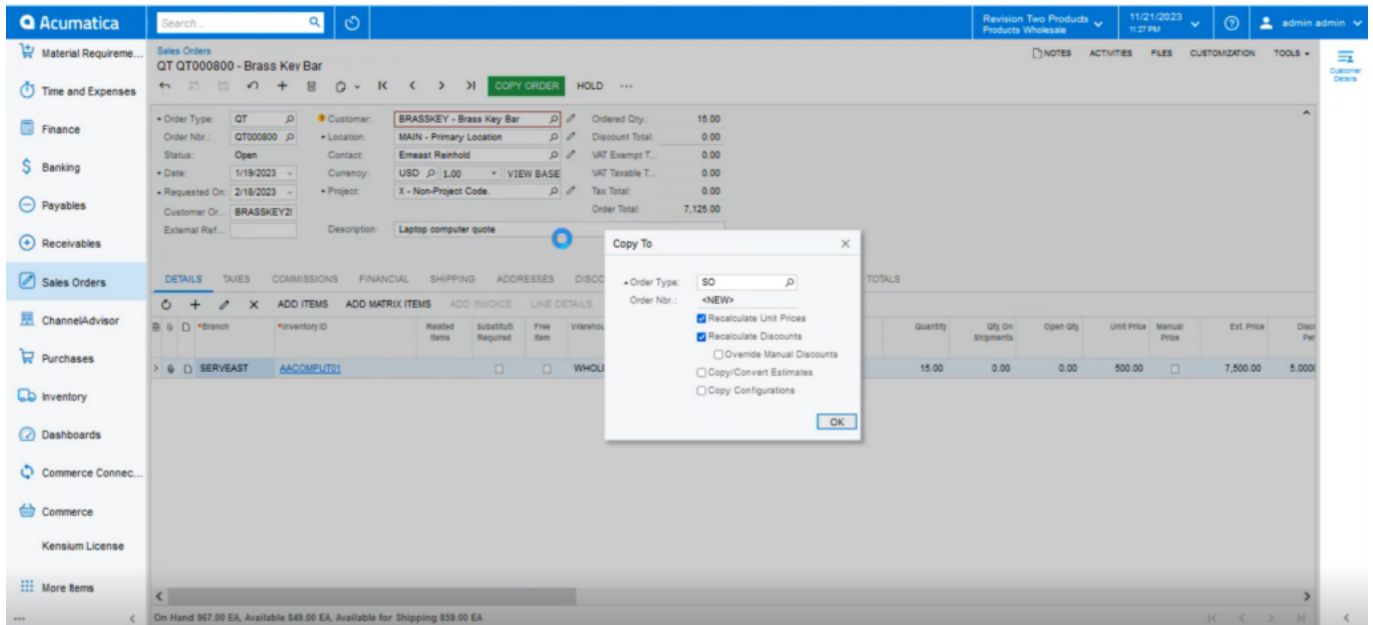
DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

Item	Quantity	Unit Price	Ext. Price	Disc. Per
ACCOMPUT01	15.00	500.00	7,500.00	5.0000

On Hand 967.00 EA, Available 849.00 EA, Available for Shipping 839.00 EA

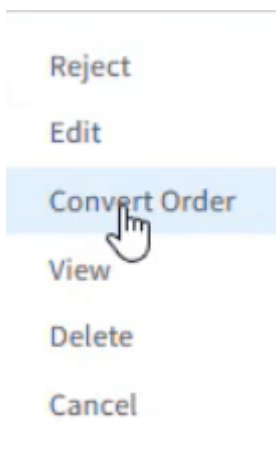
Click on Copy Order

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

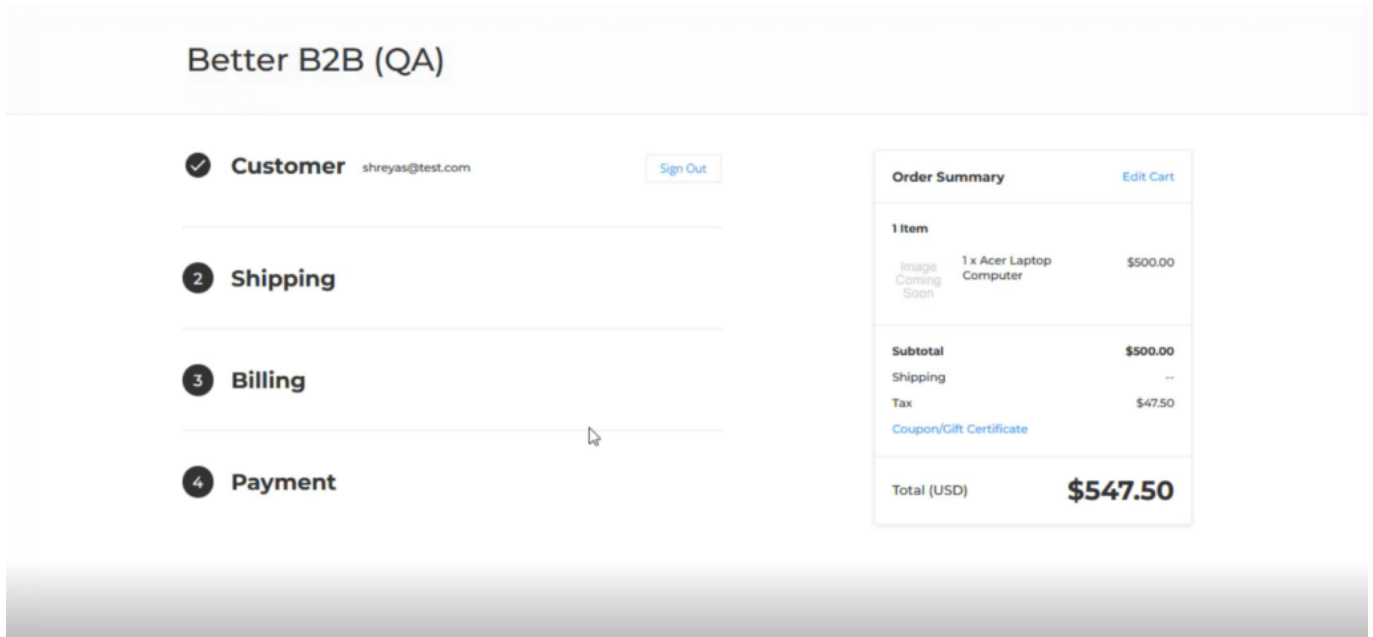
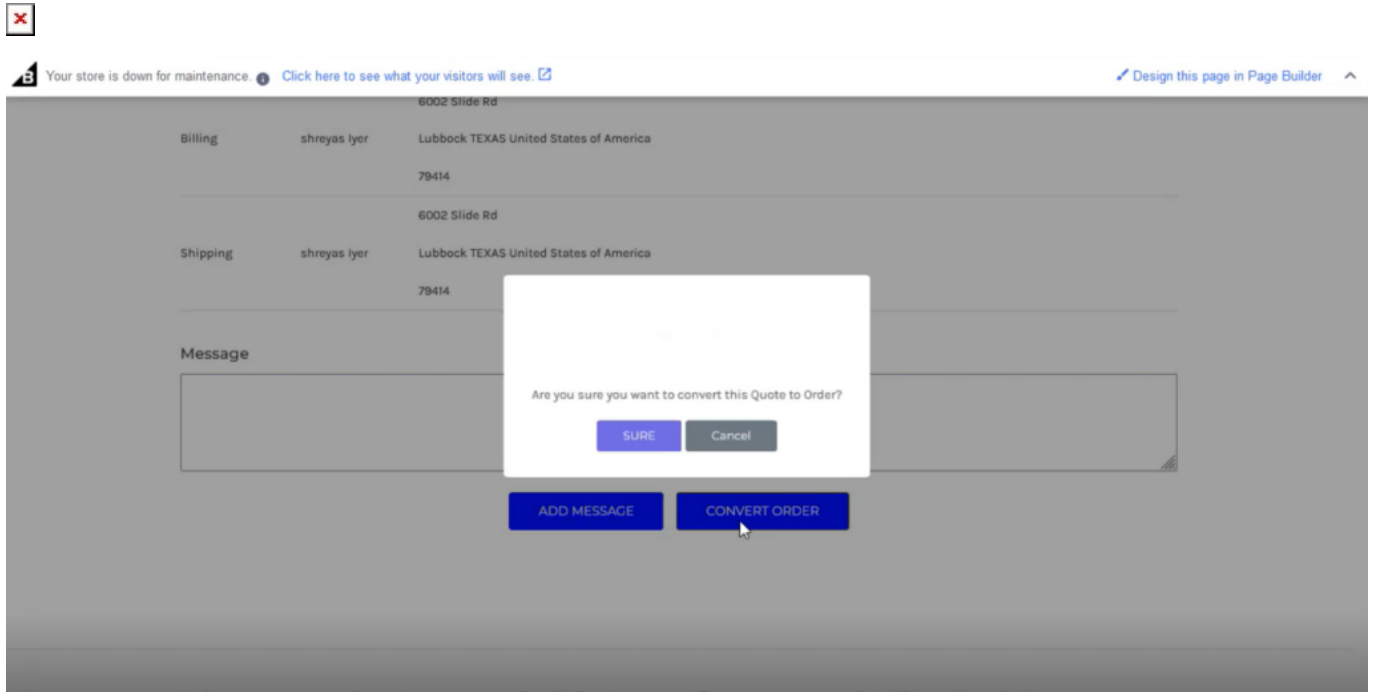
Step 11: After completing the process, the quote status will be in completed status. You can convert the quote to order from the B2B side also. By clicking on the Action button, you will get the option.



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.**

