



Create an **Opportunity** in SFDC where the selected customer must be available in SyteLine

Generate a **Quote** using the above Opportunity in SFDC

Add a **Quote Line Item** to the Quote in SFDC.
Note: The Quote Line Item is typically an item that should already exist in SyteLine

Navigate to the Quote Details page in SFDC, where you'll find that the Order lookup field is empty. To populate the Order lookup field, mark the Quote Status as "**Accepted**" and click "**Mark as Current Status.**"

Now, the Order lookup is populated within the Quote record. Click on it to navigate to the Order record page. Edit the Order record, check the "Send to SyteLine" checkbox as True, and save the record

External ID is updated in the Order record, confirming successful syncing to SyteLine

The Customer Order is received in HubKor and posted to SyteLine

The Customer Order is synced to SyteLine

Legend

