

(000) 1place - Big Picture GoLive Process [INCOMPLETE]

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An Overview of the 1place GoLive Process (for System Administrators)

The following is a HIGH LEVEL overview of the process of getting up and running on 1place to run your Inventory based business.

Initial Steps

- You will be assigned to a dedicated Customer Service Representative (CSR) that will help you with each step of the PRE and POST GoLive process.
- Your CSR will schedule a meeting to get acquainted, learn more about your goals, give you access to and review a **GoLive Checklist** with you, and schedule routine meetings to guide you through the entire GoLive process.
- The initial meetings will help your CSR better understand your business processes and which data will need to be exported from your system and imported into 1place.

Getting Your Data Into 1place

Depending on several factors, your CSR will work with you to help you understand which types of data will be necessary to export from your existing systems and prepare it to be imported into 1place.

Your data will typically need to be imported (or hand entered) in the following ORDER:

- Users
- Warehouse(s)
- Vendors
- Item List (Item #, Item Description, Item Categories, etc)
- Item Inventory Levels (1 or more item 'Receipts' (that relate to the Item List), including Inventory Qty in Stock, Costs, Warehouse, Bin Locations, etc)
- Item Vendor Item #s (1 or more Vendors' Item Numbers (that relate to the Item List), including your vendors' item #, vendor cost, case pack requirements, cubic square feet of each item, etc)
- Item Search Catalog (primarily for Auto and other Parts types companies). (1 or more rows of search information related to the item #, such as Year, Make, Model, etc)
- Item Price Levels (if applicable) (Each Item can have 1 more more 'Price Levels' such as A, B, C, or any other Price Level Name).
- Item Assembly / Kit Details (if applicable) (Some items are a 'kit' or 'assembly' of 1 or more other items. For Instance Door X could comprise a door slab, door hinges, a door knob, etc)
- Purchase Orders (open, not received)
- Purchase Order History (closed, already received, for past x years)
- Customers
- Customer Custom Prices (if applicable)
- Customer Quotes (for x # of days or months)

- Customer Sales Orders (open, not yet shipped)
- Customer Invoices (open, unpaid)
- Customer Invoices (closed, already paid, for past x years)
- Customer Credit Memo's (open, with credit still due to Customer)

Learning How to Use 1place

After your data is imported (and/or hand entered into 1place), this will make it easier to understand how your data (which is familiar to you) is stored and used in 1place. You can learn more

You will learn how to use 1place following these steps:

Knowledge Base Articles

YouTube Training Videos

Hands On Practice

Getting Help From Your Customer Support Rep (CSR)

- Job Specific Quick Start Training
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 - High Level Video Training
 - Hands On Training
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