(002) 1place - Quick Start Guide for Purchasing & Inventory Personnel

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Summary

1place.cloud is an all-in-one-place to help your company manage your Customers, Sales Orders, Inventory, and Warehouse. This **Quick Start Guide** has been designed for people who will use 1place to **manage** or **purchase inventory**.

NOTE: If cannot click on the links (because you have printed out this article) please visit www.youtube.com in the search bar type: 1place . cloud (be sure to put in the spaces).

Video #	Category	Topic
001.0	Overview & Setup	Quick Start: Learn 50% of 1place in less than 10 min
101.2	Sales	How to create Items (Parts).
101.6	Sales	How to create Credit Memos (or Return Authorizations).
104.1	Purchasing Items	How to create POs - Overview
104.2	Purchasing Items	How to create/use POs for Special Orders
	Purchasing Items	How to create PO's to Replenish Stock
103.0	Picking, Shipping, Dispatching	Overview of the Shipping & Receiving Screen.
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- Open your web browser and go to www.youtube.com
- In the YouTube search field type the **YouTube Keyword** (as shown in the table above). For instance:
  - To open the '**QuickStart: Learn 50% of 1place in less than 10 minutes**' video simply type **1place-001.0** in the YouTube search field. (Please refer to the 1st row in the table of videos above).

Training Video: Quick Start - Overview of Common Functionality

Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-001.0** in the search bar.)

- Open up your **Google Chrome** browser and navigate to: **osqbo.com**. Enter your **email** and **password**. Click **Sign In**.

- Click on the button on ANY screen, or
- Visit **www.1place.cloud/help**, or
- Talk to your company's **1place** admin. (Your onsite 1place guru)

MOST of your tasks can be completed using the 4 GREEN**Quick Start** buttons:

The **MAIN Menu** bar on the left side of the screen provides a way to open virtually all of the screen you will use to perform your job.

- Click the button (in the top left corner) and select the type of record you want to add, or

- Click on the at the bottom of a drop down list (when you cannot find the value in the drop down list), or
- Click the button on any screen (to add a record of similar type), or
- Press a **keyboard shortcut**, such as **Ctrl+F3**, or **Ctrl+F4**, etc. (You can see a list of keyboard shortcuts ON THE RIGHT SIDE of the drop down list when you click the button).
  Training Video: 4 Ways to Create a new Customer in 1place. (2:07)

  Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-101.1** in the search bar.)
  Training Video: 4 Ways to Create a new Quote in 1place. (2:38)

  Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-101.3** in the search bar.)
  Training Video: 5 Ways to Create a new Sales Order in 1place. (3:29)

  Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-101.4** in the search bar.)

- Whenever the button turns RED that means there is unsaved data. In most cases this button gets pressed automatically for you.

- **OPTION 1 - Quick Start Magnifying Glass Button**: Click the button (in the top left corner) and select the type of record you want to find.

- **OPTION 2 - Function Keys**. You can press any of the FUNCTION keys on your keyboard (as show in blue below).

  Press **F1** to find a **List of Parts** (by Year, Make, Model, item #, OEM#, Partslink #, etc)
  Press **F2** to find a Job record**.**
  Press **F3** to find a Customer record.
  Press **F4** to find a Vendor record.
  Press **F5** to find a Quote record.
  Press **F6** to find a **Sales** Order record.
  Press **F7** to find an Invoice record.
  Press **F8** to find a **Credit Memo** record.
  Press **F9** to find a Purchase Order (PO) record.
  Press **F10** to find an **Item (Part)** record.
  NOTE: When you click the button you can see the list above in the drop down list (on the right side).

- **OPTION 3 - Magnifying Glass button**. You can click on the button next to any record (to open the record detail screen).

- **OPTION 4 - Click a record on a List screen.**

Training Video: How to Customize, Print & Email Invoices, Sales Orders, Picking Tickets, Packing Slips Etc. (07:24)

Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-001.2** in the search bar.)

00:01 - Print Sales Orders, Picking Tickets, Packing Slips (on the Sales Order screen).
01:30 - Customizing a Printable Invoice.
04:55 - Emailing an Invoice (using an Email auto fill template).
05:58 - Overview of batch creating & printing Invoices on the Shipping & Receiving screen.

- Click on Print button on any screen.
- **Printing Options** popup box will be displayed.
- Input the Qty of Pages to Print.
- Select Document(s) to Print.
- To Remove, click on the **X** button under the Properties.
- To Edit the Print Settings, click on the gear button beside the X button.
- Click on **Print** on the lower right side of the popup box and it will direct you to the **Document Preview** page.
- On the Document Preview page, you can either download the document or directly print the page.
- (Note: Some records--like Sales Orders, Invoices, etc **PRINT PREVIEW** in the browser. If you want to **Print** from the **Print Preview** screen click on the in the top right corner.

- Click on the button on any screen.
- On the Send Email popup, input the quantity of records you want to print under the Qty field.
- Select Document(s) to print on the drop down button.
- Click on the **Preview Email** button on the bottom right of the popup screen.
- On the left pane of the Email popup screen shows the email recipients and the message body that will also let you create a template for your emails.
- On the right pane, shows the attachments that will be sent to the customer. This will also let you download and print the document(s).
- To edit the template, click on the **Edit Template** button on the bottom left.
- To send the email, click on the blue **Send Email** button on the bottom right.

- Click the button on the bottom of the screen. (Note: Some records cannot be deleted, such as Customers that have Sales Transactions, or Items used on Sales Transactions or PO's).
- For batch deletion, go to the transaction screen (Quotation, Sales Orders, Invoices or Purchase Order)
- Check the box on the left of the record you want to delete.

- Click on the **Batch Actions** button then click on the **Delete Selected**.
- A prompt will ask you to confirm if you want to delete the record(s). Type in**YES** to confirm then click **OK**.

- Click the button to delete line items from a Transaction or from other settings tables.

- Click the button (in the top left) and click **Item**.
  - Or, press **Ctrl+F10**
  - Or, on the menu bar on the left side, click **Items** to open the **Items list** and then click on the **New** button on the bottom left.
- Input the Item details then click on **Save**.

- On the **Item List** screen, click on the **Upload** (arrow up) button on the top right of the screen. This will display the **Import Wizard** screen.
- On the **Import Wizard** screen:
  - Click the drop down on the **Import Type** and select either **Vendor Item Numbers (All Vendors)** if trying to import items under 2 or more vendors, or **Vendor Item Numbers (1 Vendor).**
  - You have the option to update item status and set to **'Active'** by checking the box just below the **Item Vendor.**
  - Click **Download Excel Template** (blue button) and fill in that excel file with the Item records information. Save this file on your PC.
  - Go back to the **Import Wizard** screen, click on the **Browse** button and select the previously saved file from your PC.
  - Click **Proceed** (bottom right). A pop-up message will be displayed when import has completed.
  - ***If you already have an existing Item data file, you may choose to upload that file and manually map the database columns with the excel columns by clicking on the drop down arrow (under the Excel Columns).

- Open the **Catalog Management** screen:
  - Go to **Item Detail** screen > **Catalog** (tab) > **Manage Catalog button** (middle left), or
  - Go to **Settings** > **Sales** > **Find Parts** then click the **Manage Catalog** button under the **Find Parts (Auto) - Other Settings** section.
- **From the Catalog Management** screen, click on **Add New Items From Catalog Items** button (bottom right).
- Click on **Display New Items To Add** (red button at the bottom left). This will generate a temporary file or list of items that meet the **Manage Catalog** and **Year**/**Make**/**Model** filter criteria but are not yet on OneSource.
- Check the items to be added then click on **Add All Selected Items to 'Item' List in OneSource** (green button, bottom left).
- Upon successful import, you may check the added items already included in your Item List.
- Note: You may choose different **Item # Creation Types** such as:
  - **Let me create my own (Leave Blank)** - use your own code.
  - **Use PartsLink #** - Item # is same as the PartsLink #.
  - **Use OEM #** - Item # is same as the OEM #.
- Note: Check the **Make Duplicate Items for Capa Certified Parts** to automatically duplicate Capa Certified Parts (such items will have 'C' at the end of the Item # and '(CAPA)' at the end of the description field).

- Once you have created items from the **Manage Catalog** screen, you have the option to create or redefine

Pricing Groups per **Part Type**.

- To do this, go to **Item Detail** screen > **Catalog** (tab) > **Manage Catalog button** (middle left).
- This will lead you to a table that generally describes your stock on hand per Part Type (and how they are categorized, etc.)
- You may edit the **Discount %** field according to your set standard.
- Once done, click on **Additional Functions** (second button, lower left).
- Select **#2 Update Item List Categories, Sub Categories, Pricing Categories, and PO Categories with the values on my PTypes screen, where the Ptype is the same**.

- **Option 1 - Find the Invoice and Return the Item (to make a related Credit Memo).**
  - Ways to find the Invoice:
    - Press **F7**, or
    - Press **F3** to look up the Customer. On the **Customer Details** screen, click on the **Sales History** tab then click on the **Invoices/CM's** button. Click on the particular Invoice on the table as displayed.
  - On the **Invoice** screen under the **Add/Edit Line Item** section, enter the quantity you want to return on the **Qty Return** column of the item(s).
    - Note: **Qty Rtn** cannot be greater than the **Qty Ship**.
  - Click on **Commit Line Item** button (down, right of the table).
  - Click on **Create Credit Memo** button (bottom, center).
  - **'Return Entire Invoice?'** popup message will show up.
    - Click **Yes** ONLY if returning ALL items on that Invoice.
    - If you click **No** (meaning you only plan to return one or few items on that Invoice), a popup screen will appear and ask if you plan to **'Return Selected Items?'.** Click **Yes.**
  - You have just created a new Credit Memo.
  - On the **Credit Memo** screen, Click **Save** red button (bottom right).
  - **NOTE**: When you return an item using this method, **1place** enters the original price paid as the amount to refund on each Credit Memo line item created. **1place** also makes sure that users do not over-return items - meaning, it will not allow more items to be returned than what were originally invoiced.
- **Option 2 - Create a Credit Memo for the item (without linking it to an Invoice).**
  - Ways to create a new Credit Memo:
    - Press **Ctrl + F8**, or
    - On the **Main Menu Bar**, click on **Sales** > **Credit Memos** then click on **New** button (bottom left of the screen).
  - Enter the **Bill To** and **Ship To** Customer.
  - On the right, select the **Return to Warehouse**.
  - Input other related information such as **Customer PO #**, **Payment Terms**, **Sales Rep**, **Order Source** etc.
  - On the **Add/Edit Line Item** table, input the **Item#** by selecting from the drop down arrow. Input the number of items to return on the '**To Return'** field. Input number of items **Returned**. Click on **Commit Line Item** button.
  - Click on **Save**.
- **Option 3 - Delete the Invoice, Modify the Sales Order, and then Recreate the Invoice.**
  - NOTE: This option assumes that,
    - You have enabled the setting to have your Invoices automatically inherit the Sales Order # from which it was created. To do this, click on the **Gear** icon (top right of the screen) then select **Settings** > **System** > **Record Numbering**. Check the box that says '**Use Sales Order # When Creating Invoice'** under **Invoices** section.
    - You have created the Invoice but have not actually delivered the Invoice to the Customer yet.
  - Open the **Invoice** screen.
  - Press the **Delete** button (bottom left) to delete the Invoice.
  - A popup message will ask you if you want to '**Delete Related Sales Order?'**. Click **No.**

    - The **Sales Order** screen (of the Sales Order related to the deleted Invoice) will automatically be displayed.
    - At this point, you can delete the item or change the **Qty Ship** and **Qty Ord** on the Item.
    - Click the **Create Invoice** button (bottom center) to re-create the Invoice.

- Open the Add New Product or Service Item screen in different ways:
    - Press **Ctrl + F10**, or
    - On the Quick Access Keys (top left), click the **+** icon and select **Item,** or
    - Click the **New** button on the lower left part of the **Item List** screen, or
    - Click the **New Item** button on the lower left part of the **Item Details** screen, or
    - On any of the **Quotation**, **Sales Order**, **Invoice**, **Credit Memo** or **Purchase Order** screens under the **Add/Edit Line Item** table: When typing in an **Item Number** that is not found in the Drop down list, click **+ Add New** (lowest part of the drop down list) to add a new Item record.
- On the **Add New Product or Service Item** screen, fill in the following needed information:
    - Item Number, Description, Type, Search Category, Search Sub Category, Year, Make, Model etc.
    - Click **Save**.

- NOTE: When you add a new part (following the instructions above) the **Year**, **Make**, **Model**, **Category**, and **Subcategory** are all used to automatically create a record in your **Find Parts** Catalog. (This enables you to find parts using the **Find Parts** (F1) screen by Year, Make, Model, etc)

- When you add a new part (following the instructions above) the **Year**, **Make**, **Model**, **Category**, and **Subcategory** are all used to automatically create a record in your **Find Parts** Catalog. (This enables you to find parts using the **Find Parts** (F1) screen by Year, Make, Model, etc)
- To modify the search criteria (or add additional vehicles that the part fits) see the instructions in the section below.

- On the **Item Detail** screen of the particular Part you want to modify, click on **Item Details** tab.
    - In the section called **Categories & Part Numbers** you can see the details of the particular item/part (**Type**, **Search Category**, **Years Range**, **Make, Model**, etc. NOTE: These details are used by the **Find Parts** screen to find parts.
    - Changing the **Years Range** will auto update the **Years Listing** field (below it) which is the actual field the **Find Parts** screen uses to search for the Year of the part.
- To create an additional Catalog entry (to find that particular part on the **Find Parts** screen using a different Year, Make, Model combination), click on the **Catalog** tab (on the **Item Detail** screen of that particular part) then click on **Add New Catalog Entry.**
    - Enter: **Year Range, Make, Model, Category, Sub Category, Item Description and Years Listing.**
    - Click **Save.**
    - Note: You can enter an unlimited number of catalog entries per item.
    - Note: For faster entry, you may 'duplicate' a particular row by clicking on the **Duplicate Catalog** button under **Action** field. Edit necessary information then click **Save**.

There are 3 ways to import and update items in your item list AND searchable Catalog:

- **Option 1 - Import and update Items (automatically) using the 1place Manage Catalog screen.**
    - Go to **Item Detail** screen > **Catalog** (tab) > **Manage Catalog button** (middle left).
    - **From the Catalog Management** screen, click on **Add New Items From Catalog Items** button (bottom right).

- Click on **Display New Items To Add** (red button at the bottom left). This will generate a temporary file or list of items that meet the Manage Catalog and Year/Make/Model filter criteria but are not yet on OneSource.
- Check the items to be added then click on **Add All Selected Items to 'Item' List in OneSource** (green button, bottom left).
- Upon successful import, you may check the added items already included in your Item List.

- **Option 2 - Import and update Supplier Item #'s and Costs using the Import/Export function in 1place.**
  - On the Item List screen, click on the **Upload** (arrow up) button on the top right of the screen. This will display the **Import Wizard** screen.
  - On the Import Wizard screen:
    - Click the drop down on the Import Type and select either **Vendor Item Numbers (All Vendors)** if trying to import items under 2 or more vendors, or **Vendor Item Numbers (1 Vendor).**
    - You have the option to update item status and set to **'Active'** by checking the box just below the **Item Vendor.**
    - Click **Download Excel Template** (blue button) and fill in that excel file with the Item records information. Save this file on your PC.
    - Go back to the Import Wizard screen, click on the **Browse** button and select the previously saved file from your PC.
    - Click **Proceed** (bottom right). A pop-up message will be displayed when import has completed.
    - ***If you already have an existing Item data file, you may choose to upload that file and manually map the database columns with the excel columns by clicking on the drop down arrow (under the Excel Columns).
- **Option 3 - Ask OneSource Software customer support to import your data for you.**
  - Additional details coming for this soon.

- Click the button (in the top left) and click **Purchase Order.**
  - Or, press **Ctrl+F9**
  - Or, on the **Main Menu Bar** on the left side, click **Purchasing** > **Purchase Orders list** and then click on the **New** button on the bottom left.
- Enter a Vendor (then press **Enter**).
- If desired, change the **Bill To warehouse** (then press **Enter**).
- If desired, change the **Ship To Warehouse** (then press **Enter**).
  - If you want to Drop Ship the item to a Customer click on the **Drop Ship To Cust** button and then select the Customer.
  - If the customer is not in the system pick a generic customer you have created and then hand type the Customer Name and Address in the larger box the drop down list.
- Enter or change any of the PO Header fields:
  - Vendor Order #.
  - PO Date.
  - Date Expected.
  - FOB.
  - Payment Terms
  - Ordered By
  - Customer PO#
  - Ship Via
- Enter Line Items
  - Qty Ord
  - Item Number

- Vendor Item Number
    - Qty Received
    - Description
    - Sales Order #
    - List
    - Spec Order Price
    - Add'l Cost
    - Cost
    - Line Total
- Enter additional Info on the tabs
    - Other Info > Comments
    - AP Bill Info
- Click **Save**.
- Click **Send Email** to Email the PO to the Vendor.
- Click **Print** to print out the PO.
- Click **Help** to see a help topic on the PO screen.
- Click **Close** to close the PO.
- If desired, enter the Vendor Order # (then press **Enter**).
- Enter or change any of the POInput the Item details then click on **Save**.

- On the **Purchase Order** screen > **Add/Edit Line Item** table, check the box '**Rcvd**' to tag as received. This will auto-fill the value under **Qty Received** column.
- You may edit the **Qty Received** value depending on the actual item/s received.
- Click on **Commit Line Item** button.
- Click **Save**.

- On the **Purchase Order** screen > **Add/Edit Line Item** table, uncheck the box '**Rcvd**'.
- Click **Commit Line Item button**.
- Click **Save**.
- This should remove the 'Received' green stamp on the bottom right of the screen.

- On the **Purchase Order** screen, click **Delete** button (lower left part of the screen). Type **Yes** on the prompt and click **Ok**.
- On the **Purchase Order List** screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, or
- Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion.
- Note: To preserve the integrity of the database, you cannot delete any Purchase Order record that has been used on any of the screens such as **Sales Orders**, **Sales Order PO's**, **Invoices** etc.

- On the **Sales Order** screen, input the item number with backorder.
- Click **Create PO(s)** button on the bottom part of the page. This will direct you to the **Sales Order Purchase orders (to create)** screen.
- The default will show the current Sales Order with the backordered item. You can click on **Show All** to look all the other backorders.
- Check the Sales Order you want to create a PO.
- Select **Vendor** on the dropdown.

- Click on the **Proceed (Show Prebuild Summary)**. A **Sales order PO's - Prebuild Summary** popup will show up.
- You can either add the backordered item on an existing PO by selecting the **PO number** under the Existing **PO column** or Create a New PO by checking the **Create PO box**.
- Then, click on the **Create/Add to PO's** button.
- Look in the **Purchase Order List** screen to find the newly created PO.

You have 3 options to choose from to create Purchase Orders for special order items (these are out of stock items or for some reasons, currently unavailable). On the **Sales Order** screen, these are the Line Item(s) with:

1--The **PO** field box(es) checked, and

2--Do NOT yet have PO#(s) in the **PO #** field.

  - NOTE: You can configure the Setting that will automatically check the **PO field box** each time items 'that are out of stock' are placed on a Sales Order . To do this, go to **Settings**>**Sales**>**Sales Orders** then select '**Yes**' from the **drop down** button under **Sales Settings** section that says 'After adding an item to a Sales Order, auto select the Sales Order line item PO checkbox when the item is out of stock'.

- **OPTION 1 - Make a PO from a Sales Order.** (When there are one or more Line Items to be purchased from the same Vendor.)
  - On the **Sales Order** screen, click the **Create PO(s)** button. This will open the **Sales Order Purchase Orders (to create)** screen.
  - On the **Sales Order Purchase Orders (to create)** screen, click on the **Vendor drop down** button and select a Vendor. (Note: If you have more than one (1) Line Items, make sure they have the same Vendor)
  - Input **Cost** for each Line Item.
  - Click on **Proceed (Show Prebuild Summary).**
  - Click on **Create/Add to PO's button.**
  - **The Purchase Order screen will automatically be displayed.**
    - **Notice the SO# on the Sales Order # Column (under the Add/Edit Line Item section) for that Line item. When you click on the magnifying glass icon beside it, it will direct you back to the Sales Order** screen (where you made the PO for that line item).
    - **(Conversely) On the Sales Order screen, notice that the PO column has been checked and the PO# field for the Line Item has already been filled. When you click on the magnifying glass icon beside it, it will direct you to that related Purchase Order you just created.**

- **OPTION 2 - Make a Batch of PO's to buy Special Order Items.** (When there are more than one (1) Line Items and they are to be purchased from different Vendors.)
  - The process is similar to Option 1 except that you will have more than one Vendor for these batch of Line Items.
  - Another way is to directly go to the **Sales Order Purchase Orders (to create)** screen and click on the **Show All** circle icon (top left). This will show you ALL special order items that need to be purchased.
    - You can create a batch of Purchase Orders on this screen (instructions as follows).
      - Select the items that you want to include in this batch of PO by checking the boxes (left, first column).
      - Select the **Vendor** for each item and input **Cost**.
      - Click on **Proceed (Show Prebuild Summary).**
      - Click on **Create/Add to PO's button.** You have just created a batch of POs. You can see them now added in your Purchase Order list [(Main Menu Bar)**Purchasing** > **Purchase Orders**].

- **OPTION 3 - Add Special Order items to an Existing PO.**

- Scenario: Suppose you created PO 101 to Vendor A with a few line items. Then your phone rang and another item is placed on a Sales Order (that has the **PO field box** checked) and you want to add that item to the existing PO 101 (instead of creating a New PO) because you plan to order from the same Vendor A. The following instructions will allow you to do this.
    - On the **Sales Order** screen (where the **PO field box** of the Item that you want to add is checked), click **Create PO(s)**. This will open the **Sales Order Purchase Orders (to create)** screen.
    - On the **Sales Order Purchase Orders (to create)** screen, click on the **Vendor drop down** button and make sure to select the same Vendor as the Vendor on the Existing PO (where you want to add the item(s). **In this sample scenario, Vendor A.
    - Input the **Vendor Cost**.
    - Click on **Proceed (Show Prebuild Summary).**
    - On the **Sales Order PO's - Prebuild Summary** popup screen, uncheck the **Create PO** box then click on the **Existing PO drop down** icon. The **popup list of PO's with corresponding Vendors** will appear. Select the PO# where you want to add the item(s).
        - Note: The popup list of POs is arranged by date from most recent down to oldest POs with corresponding Vendor names making it easy for you to locate the right PO.
    - Click **Create/Add to PO's button**.
    - The **Purchase Order** screen will automatically be displayed and will show (on the **Add/Edit Line Item** section) that you have just added the new Line Item.

- Open the Add New Product or Service Item screen in different ways:
    - Press **Ctrl + F10**, or
    - On the Quick Access Keys (top left), click the **+** icon and select **Item,** or
    - Click the **New** button on the lower left part of the **Item List** screen, or
    - Click the **New Item** button on the lower left part of the **Item Details** screen, or
    - On any of the **Quotation**, **Sales Order**, **Invoice**, **Credit Memo** or **Purchase Order** screens under the **Add/Edit Line Item** table: When typing in an **Item Number** that is not found in the Drop down list, click **+ Add New** (lowest part of the drop down list) to add a new Item record.
- On the **Add New Product or Service Item** screen, fill in the following needed information:
    - Item Number, Description, Type, Search Category, Search Sub Category, Year, Make, Model etc.
    - Click **Save**.
- NOTE: When you add a new part (following the instructions above) the **Year**, **Make**, **Model**, **Category**, and **Subcategory** are all used to automatically create a record in your **Find Parts** Catalog. (This enables you to find parts using the **Find Parts** (F1) screen by Year, Make, Model, etc)

Keywords: training sales reps auto body parts