(001) 1place - Quick Start Guide for Sales & Customer Service 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 do Sales and/or Customer Service.

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).

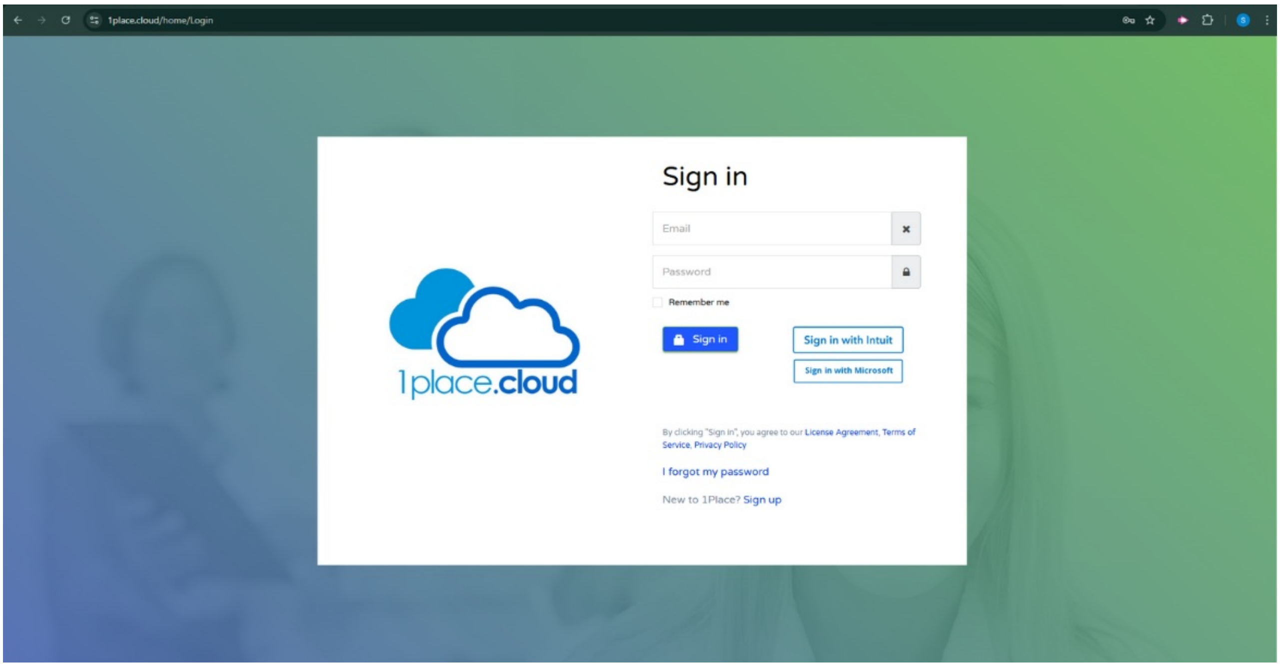
Video #	Category	Topic
001.0	Overview & Setup	Quick Start: Learn 50% of 1place in less than 10 min
001.1	Overview & Setup	Quick Start: Using the Find Parts screen. How to find, price and sell parts. *(For Aut*
001.1b	Overview & Setup	Quick Start: Using the Find Parts screen. How to find, price, and sell parts. *(For Wh*
001.2	Overview & Setup	Quick Start: How to Print & Customize Invoices, Picking Tickets, etc.
001.3	Overview & Setup	How to Setup & Manage Users
101.1	Sales	How to create Customers.
101.2	Sales	How to create Items (Parts).
101.3	Sales	How to create Quotes.
101.4	Sales	How to create Sales Orders.
101.5	Sales	How to create Invoices.
101.5a	Sales	How to receive payments.
101.6	Sales	How to create Credit Memo's (or Return Authorizations).
102.1	Sales	How to automatically price parts using a Default Pricing Method.
102.2	Sales	How to automatically price parts using Custom Pricing.
102.3	Sales	How to set up sales taxes codes in OneSource.
103.0	Warehouse Management	Overview of the Shipping & Receiving Screen.
103.1	Warehouse Management	How to Use the Shipping & Receiving Screen to PICK Parts.
103.2	Warehouse Management	How to use the Shipping & Receiving screen to Dispatch Parts
103.3	Warehouse Management	How to use the Shipping & Receiving screen to Re-Dispatch Parts
103.4	Warehouse Management	How to buy, setup, and use the osScan system
104.1	Purchasing Items	How to create Purchase Orders
104.2	Purchasing Items	How to use the Sales Order POs Screen

- 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 video's 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: **1place.cloud**. 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 on 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 record.
NOTE: When you click the button you can see the Shortcut 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** pop-up screen will appear.
- Input the **Qty** of Pages to Print.
- Select Document(s) to Print (**drop down** button).
- To Remove, click on the **X** button under the Properties.
- To Edit the Print Settings, click on the **Gear** button beside the **X** button.
  - You will see different Print Settings and Properties which you can edit according to your preferences.
  - Click **Save**.
- Click on **Print** on the lower right side of the popup screen 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 (upper right part of the screen).
- (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 in 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**.

- On any Transaction screen (**Quotation**, **Sales Orders**, **Invoices** or **Purchase Order**) under the **Add/Edit Line Item** section, click the button to delete line item(s) from that Transaction.

Training Video: Using the Find Parts screen to Find Parts, Check Prices & Stock Levels, Create Quotes & Sales Orders, etc.

Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-001.1** in the search bar.)

- Press the **F1** key on your keyboard (or click on the button).
- Input **Ship To** address (from the **drop down** button).
    - Note: If Customer is not in the **drop down** list and you want to add that Customer to your database, click **+Add New** located at the bottom part of that list.

- Input **Bill To** address (from the **drop down** button).
- Fill in the Search Filters as follows:
    - Input the two-digit **Year** of the vehicle.
    - Input **Make** using the **drop down** button.
    - Input **Model** using the **drop down** button.
    - (If desired) To narrow down your search:
        - Select a **Category** of the part (from the **drop down** button).
        - Select a **Sub-Category** of the part (from the **drop down** button).
        - You may enter a part 'keyword' in the **Description** field (or leave it blank).
        - You may enter a **Part Number** (or leave it blank). NOTE: The part # could be YOUR part #, an OEM part #, a Vendor part #, etc... It is an all-inclusive part # search.
- Click on **Search** (green button).
- A list of Items will show below the Search Filters.
- Select the item by checking the box on the **X** column. Input quantity of the item under **Qty** field.
    - Note: The item selected (or checked) will be retained on top of the item display list. This makes it easy for you if you need to change the Search Filters to add another item or more.
- Once done selecting the items with the corresponding quantities, you may create a Quote by clicking on the **Add To Quote** button on the footer (bottom left) or create a Sales Order by clicking on the **Add To Sales Order** button.
- You can also add additional parts to the **Quote** or **Sales Order** you just created.
    - On the **Add/Edit Line Item** table section (last row that is empty), click on the **Item# drop down** icon to select a particular line item. Input the **Quantity Order** then click **Commit Line Item.** Click **Save.**
- Next Steps. Now you can...
    - Print the **Quote** or **Sales Order** by clicking on the **Print** button.
    - Email the **Quote** or **Sales Order** by clicking on the **Email** button.
    - Close the **Quote** or **Sales Order** by clicking on the **Close** button.

    - Start a new **Find Parts** search by clicking **New** button (bottom left). This will open up a new blank **Find Parts** screen.
    - Find a previous **Quote** or **Sales Order.**
        - Open an **Item Detail** screen.
            - Press **F10** then select an item, or
            - Click on **Items** (on **Main Menu** bar) then click on any item on the list.
        - On the **Item Detail** screen, click on **Sales** tab.
        - Click on **Sales Orders** button and **Quotations** button to view previous Quotes and Sales Orders related to that item.
    - Apply a Deposit Payment on a Sales Order
        - On the **Sales Order** screen, click on the **Payment Info** tab then click on the **Receive/Edit Payment(s)** button.
        - The **Payments** popup screen will show.
        - Click on the **drop down** icon to select the **Payment Method.** Input other related details when necessary.
        - Input the Deposit Amount in the **Amount Tendered** box.
        - Click on **Apply Payment**.
            - Note: You cannot add or edit any payments on the Sales Order that has already been

invoiced.

- Create an Invoice
  - On the **Sales Order** screen, click on **Create Invoice** button (below, center).
    - The system automatically fills up the Invoice# box (upper right of the **Sales Order** screen) after creating the Invoice. (If you click on the **Magnifying Glass** button next to it, the related Invoice will be displayed.)
- Apply a Payment to an Invoice
  - On the **Invoice** screen, click on the **Payment Info** tab then click on the **Receive/Edit Payment(s)** button.
  - The **Payments** popup screen will show.
    - Note: If previous payments have been made (i.e. deposit payment on the Sales Order transaction), this popup automatically shows the sum total of payments on the **Total Prev Payments** box as well as the **Amount Due**.
  - Click on the **drop down** icon to select the **Payment Method.** Input other related details when necessary.
  - Input the **Amount Tendered**.
    - Note1: The system automatically fills the **Amount Tendered** box (which is the amount still due) but you may edit accordingly. Click on **Apply Payment** button.
    - Note: A **'PAID'** stamp will appear beside the **Receive/Edit Payment(s) table** when the Invoice is fully paid.

- Press **F3** (or click the button and then click **Customer**).
- On the **Customer Details** screen, click on the **Sales History** tab, and then click on any of the buttons that display a list of **Quotations**, **Quotation Line Items**, **Sales Orders**, etc...
- **Note**: You can open any of the sales transaction by clicking on the selected transaction.

If you need to find a Quote

- Press **F5** (or click the button > **Quotes**).
- On the **Quick Search** pop-up screen, click on the **drop down** button for the **Search By** filter and select **Number (Quote Number)**.
- The Quote List table will then show all Quotes by Quote Number on the first column.
- Note: You can also select many different ways to search a Quote (by clicking on the **drop down** icon under **Search By** filter). You can search by Amount, Bill To Company, Ship TO Company, Quote Date, etc.

If you need to find a Sales Order

- Press **F6** (or click the button > **Sales Orders**).
- On the **Quick Search** pop-up screen, click on the **drop down** button for the **Search By** filter and select **Number (Sales Order Number)**.
- The Sales Order List table will then show all Sales Orders by Sales Order Number on the first column.
- Note: You can also select many different ways to search a Sales Order (by clicking on the **drop down** icon under **Search By** filter). You can search by Date of Sales Order, PO Number, Line Item Info, etc.

If you need to find an Invoice

- Press **F7** (or click the button > **Invoices**).
- On the **Quick Search** pop-up screen, click on the **drop down** button for the **Search By** filter and select

Number (Invoice Number).
- The Invoice List table will then show all Invoices by Invoice Number on the first column.
- Note: You can also select many different ways to search an Invoice (by clicking on the **drop down** icon under **Search By** filter). You can search by Company (Ship To), Date of Invoice, PO Number, Line Item Info, etc.

If you need to find a Credit Memo

- Press **F8** (or click the button > **Credit Memos**).
- On the **Quick Search** pop-up screen, click on the **drop down** button for the **Search By** filter and select **Number (Credit Memo Number)**.
- The Credit Memo List table will then show all Credit Memos by Credit Memo Number on the first column.
- Note: You can also select many different ways to search a Credit Memo (by clicking on the **drop down** icon under **Search By** filter). You can search by Date of Credit Memo, PO Number, Line Item Info, etc.

- Open up a Customer record. On the **Customer Details** screen, click on **Custom Pricing** tab.
    - Note: There are many ways to set up customer prices using this tab. If no set up is selected, the system simply takes the List Price of the item(s) for that customer. (To view the List Price of a particular item, go to **Items** (**Main Menu** Bar) then select the item to open the **Item Details** screen. Click on **Financial** tab. You will see the List Price on the **Pricing** section.)
- On the **Custom Pricing** tab screen, you can:
    - Select a **Default Pricing Method** on the drop down list.
    - And/Or...Click the **Add Custom Pricing Template** drop down icon and select from the Custom Pricing Template list (set up by your company). Click on **Go** button. (Notice that the Custom Prices settings will be displayed on the Custom Prices table below it.)
    - And/Or... Manually add **Pricing Categories** or **Specific Items** to further define the Custom Prices table.
        - Note: The set prices on the Custom Prices table over-ride the selected 'Default Pricing' method.

Training Video: How to automatically price parts using Custom Pricing.

Click Here to view the video on YouTube. (Or **open YouTube** and type: **1place-102.2** in the search bar.)

Below are the different ways to automatically price all items of a Customer based on the item cost:
- **Option 1: How to Price ALL items to a Customer <u>for the ITEM LIST PRICE</u>**
        - Press **F3** to look up a Customer record.
        - Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Item List Price**. Click **Save**.
        - Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the **Custom Pricing** table by clicking the **X** icon.
- **Option 2: How to automatically Price ALL items sold to a Customer <u>for X DISCOUNT OFF the ITEM LIST PRICE</u>**
        - Press **F3** to look up a Customer record.
        - Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Discount**.
        - Type in the **Discount %**. Click **Save**.
        - Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the **Custom Pricing** table by clicking the **X** icon.
- **Option 3: How to automatically Price ALL items sold to a Customer <u>for X MULTIPLIER OF the ITEM LIST PRICE</u>**
        - Press **F3** to look up a Customer record.

- Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Multiplier**.
- Type in the **Multiplier %**. Click **Save**.
- Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the **Custom Pricing** table by clicking the **X** icon.

- **Option 4: How to automatically Price ALL items sold to a Customer for X MARKUP ABOVE the Item COST**
  - Press **F3** to look up a Customer record.
  - Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Markup**.
  - Type in the **Markup %**. Click **Save**.
  - Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the **Custom Pricing** table by clicking the **X** icon.
- **Option 5: How to automatically Price ALL items sold to a Customer for X ITEM PRICE LEVEL**
  - Press **F3** to look up a Customer record.
  - Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Item Price Level**.
  - Select the applicable Pricing Level by clicking on the drop down list. Click **Save**.
  - Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the **Custom Pricing** table by clicking the **X** icon.

Below are the different ways to automatically price a specific item sold to a Customer based on the item cost:

- **Option 1: How to automatically Price a SPECIFIC Item sold to a Customer for X DISCOUNT OFF the ITEM LIST PRICE**
  - Press **F3** to look up a Customer record.
  - Click on the **Pricing** tab.
  - On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
  - Type in the **Discount %**. Click **Save**.
  - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 2: How to automatically Price a SPECIFIC Item sold to a Customer for X MULTIPLER OF the ITEM LIST PRICE**
  - Press **F3** to look up a Customer record.
  - Click on the **Pricing** tab.
  - On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
  - Type in the **Multiplier %**. Click **Save**.
  - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 3: How to automatically Price a SPECIFIC Item to a Customer for X MARKUP ABOVE the Item COST**
  - Press **F3** to look up a Customer record.
  - Click on the **Pricing** tab.
  - On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
  - Type in the value (%) on the **Markup** column. Click **Save**.
  - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 4: How to automatically Price a SPECIFIC Item to a Customer for X ITEM PRICE LEVEL**
  - Press **F3** to look up a Customer record.
  - Click on the **Pricing** tab.
  - On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
  - Select by clicking on the drop down list to choose the **Price Level**. Click **Save**.
  - Note: Item Pricing Levels are defined and preset on **Settings>Items>Item Settings>Item Pricing**

Levels (table).
    - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 5: How to automatically Price a SPECIFIC Item to a Customer for X Specific Price**
    - Press **F3** to look up a Customer record.
    - Click on the **Pricing** tab.
    - On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
    - Type in the value to set the price on the **Specific Price** column. Click **Save**.
    - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.

Below are the different ways to automatically create Item Pricing Groups based on the type of part:

- **Option 1: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X DISCOUNT OFF the ITEM LIST PRICE**
    - Press **F3** to look up a Customer record.
    - Click on the **Pricing** tab.
    - On the **Custom Pricing** table, select the **Pricing Category** by clicking the **drop down** list.
    - Type in the **Discount %**. Click **Save**.
    - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 2: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X MULTIPLIER OFF the ITEM LIST PRICE**
    - Press **F3** to look up a Customer record.
    - Click on the **Pricing** tab.
    - On the **Custom Pricing** table, select the **Pricing Category** by clicking the **drop down** list.
    - Type in the **Multiplier %**. Click **Save**.
    - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 3: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X MARKUP ABOVE the Item COST**
    - Press **F3** to look up a Customer record.
    - Click on the **Pricing** tab.
    - On the **Custom Pricing** table, select the **Pricing Category** by clicking the **drop down** list.
    - Type in the **Markup %**. Click **Save**.
    - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.
- **Option 4: Item Pricing Option 9: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X ITEM PRICE LEVEL**
    - Press **F3** to look up a Customer record.
    - Click on the **Pricing** tab.
    - On the **Custom Pricing** table, select the **Pricing Category** by clicking the drop down list.
    - Select by clicking on the **drop down** list to choose the **Price Level**. Click **Save**.
    - Note: Item Pricing Levels are defined and preset on **Settings>Items>Item Settings>Item Pricing Levels** (table).
    - Note: Custom prices that are set on the **Custom Pricing** table over-ride the **Default Pricing** Method assigned to that particular customer.

- On the **Main Menu** Bar, click on **Sales** > **Pricing Templates**.
- Click on the **drop down** under **Search** box to select the Template Name.

- Click on **Update ALL Customers Using This Template** button (below center).
- A **popup screen** will notify that this process will delete and update all Custom Pricing (related to the template selected) for all Customers that have the the selected Pricing Template. Click **Ok** to proceed.

- Select an Invoice.
- Click on the **Create Credit Memo** blue button at the bottom part of the page.
- A popup message will ask if you want to **Return Entire Invoice**. Click **Yes**.
    - Note 1: All Line Items in that particular Invoice will be copied and carried over to the new Credit Memo created.
    - Note 2: If you want to create a Credit Memo just for an item or few (and not for all of the items in the entire Invoice),
        - Input the **Qty Rtn** (Quantity Return) value of the particular Line Item/s.
        - Click on **Commit Line Item** button.
        - Click on **Create Credit Memo**.
        - A popup message will ask if you want to **Return Selected Items.** Click **Yes.**
    - Note 3: You can put any value (equal to or less than the **Qty Ship**) on the **Qty Rtn** field.
- A new Credit Memo is created. Click **Save**.

- Go to the Credit Memo List screen.
    - Press **Shift+F8**, or
    - On the **Main Menu Bar**, click on **Sales** > **Credit Memos**
- Click on the **New** button on the bottom left.
- Enter the **Bill To** and **Ship To** Customer.
- On the right, select the **Return to Warehouse**.
- Input other details (**Customer PO #**, **Payment Terms**, **Sales Rep**, etc)
- On the **Add/Edit Line Item** table, select the **Item #** on the **drop down arrow** then input item(s) **To Return** and **Returned**.
- Click on **Commit Line Item** button.
- Click on **Save**.

- On the **Sales Order** screen, input the item number with back order.
- Click on **Create PO(s)** button on the bottom part of the screen. This will direct you to the **Sales Order Purchase Orders (to create)** screen.
- The default will show the current Sales Order with the back ordered item. You can click on **Show All** to look all the other back orders.
- Check the **Sales Order** you want to create a PO.
- Select **Vendor** on the **drop down**.
- Click on the **Proceed (Show Prebuild Summary)** button. A **Sales Order PO's - Prebuild Summary** popup will be displayed.
- You can either add the back ordered item on an existing PO by selecting the PO number under the **Existing PO drop down** arrow or create a new PO by checking the **Create PO** box.
- Click on **Create/Add to PO's** button.
- Look in the **Purchase Order List** screen to find the newly created PO.

- Click the button (in the top left) and select **Item,** or
    - Press **Shift+F10,** or
    - Click **Item** (on the left side) 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).

- **Check Stock Details for an item**:
    - On the **Find Parts Line Item List** section, click on the item then click the **Show Stock** button (footer, center). This will display the '**Item Stock**' details (i.e. **Item#**, **Qty in Stock**, **Vendor**, **Reserved for Order #**, **Warehouse**, **Bin**, **Location**, **Cost**) for that item just below the **Line Item List** section.
        - Note: This is the same information you would see (plus more details) if you go to **Item Detail** screen>**Stock** tab for that particular item.
    - Click on **Hide Stock** button to close and return to the full list of items.
- Instantly view **Customer Credits** on the **Find Parts** Screen:
    - On the **Find Parts** screen, click on **Show Customer Credits** button (footer, center).
    - A popup screen will show you a summary of the Invoice#/Credit Memo# and the corresponding credit amounts.
- **Check Vendor Details for an item**:
    - On the **Find Parts Line Item List** section, click on the **magnifying glass** icon beside the particular **Item#. Item Detail** screen will be displayed.
    - Click on **Vendors** tab.
- **Include Inactive Items in Search Results**: By default, when new items are imported into **1place** (using the **Manage Catalog** screen) the items are set to 'Inactive' (meaning they will NOT appear in your**Find Parts** screen searches--until such time that a Supplier is added to the item. (This helps prevent selling items for which you have no Supplier). When viewing a list of parts on the **Find Parts** screen, you can click the **Include Inactive & PL** button to add any inactive parts to the list in light gray (if the part matches your search criteria).

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.

- **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) 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.

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.**
    - Get connected to any OneSource Customer Support agent.
        - SEND AN EMAIL: Send your query to support@onesourcesoftware.com to get answer to your concern(s).
        - VOICE CALL: Talk to a live tech support agent at 1 (801) 748-4804

Reference: All Keyboard Short-Cuts

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