(005) 1place - Quick Start Guide for System Admins (Settings) (*** UNDER CONSTRUCTION)

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Overview

This article provides a summary of the 'settings' that affect many of the functions in 1place. It is highly recommended that you review the entire article to get familiar with the high level settings that affect 1place.

Creating a New Company Login

Creating a New Company

- You can technically visit www.onesourcesoftware.com and create a new Trial (or Buy) Company. However, we recommend allowing OneSource Software personnel creating your company for you and helping do any necessary 'data conversion' if you have Customer, Item, Sales, Purchasing data NOT in QuickBooks Online. This will make a 10x easier to start learning and using 1place with the proper data in place.

Logging in to 1place.cloud

- Open you GOOGLE CHROME browser and type **1place.cloud**.
- Enter the Email Address and Password that you received from OneSource Software Solutions.
- **Note 1**: You can login from any Web Browser but we recommend using Google Chrome.
- **Note 2**: If a user logs into 1place in 1 location and then logs into 1place from another browser it will log the user out of the older of the 2 logins.

Setting Up Company Info

- Log After you have logged into 1place, click the **GEAR** icon (in the top right corner) and select **Settings** > **Company** > **Company Details**
- If this is not already setup for you, enter your **Company Name**, **Company Contact Name**, the admin **Email Address**, **Company Website**, the main Company **Phone #**, and the company **Physical address** info.
    - If you have more than 1 warehouse you find information about how to setup company warehouses further down in these instructions.

Setting Up Your Company Logo

- Click the **GEAR** icon (in the top right corner) and select **Settings** > **Company** > **Company Details**
- Click on the **Add/Change Logo** button and browse to your Company Logo file.

Selecting the Subscription Type & # Users

- Click the **GEAR** icon (in the top right corner) and select **Settings** > **Company** > **Subscription Info**
- Select the **Number of Users** your company will need to perform all **1place** functions. The Quantity you select will be the # of unique user accounts you can set up (and will be billed for each month).
- Select the **Subscription Type**. You can see a table of features included in each subscription type in the table to

the right.

   - Note: As of this writing the **Credit Card Info** button and the **Cancel Subscription** buttons do not do anything. Please contact support@onesourcesoftware.com for additional help with these functions.

Setting Up Users

Adding New Users

- Click the **GEAR** icon (in the top right corner) and select **Users** (or select **Gear** > **Settings** > **Users**)
- Click the New button.
   - If you click the New button and you get a popup that says: 'Out of Licenses' you will need to either delete 1 or more of the existing users or increase the # of user licenses. (You can increase the # of user licenses by clicking Yes on the popup message (or click **Company** > **Subscription Info**).
- See User **Security - How To's** for more information about each of the individual settings.

Editing Existing Users

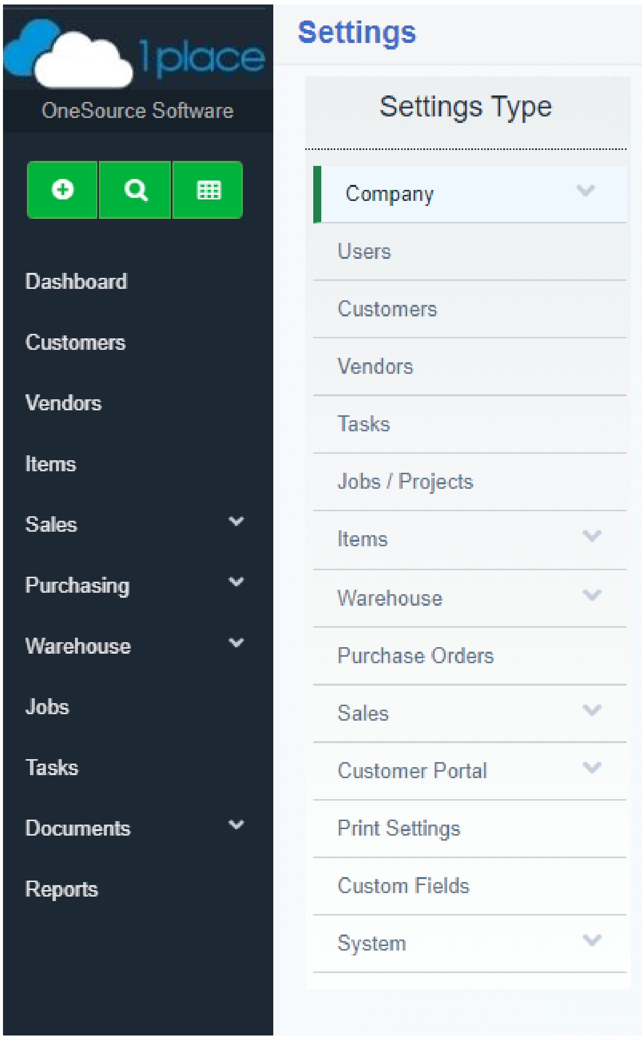
- Click the **GEAR** icon (in the top right corner) and select **Users** (or select **Gear** > **Settings** > **Users**)
- Then click on the 'pencil' icon to the left of the user name, in the **Action** column.

Deleting Existing Users

- Click the **GEAR** icon (in the top right corner) and select **Users** (or select **Gear** > **Settings** > **Users**)
- Then click on the 'X' icon to the left of the user name, in the **Action** column.

Opening the Settings

- Click the **GEAR** icon (in the top right corner).
- Select **Settings**.
- Click on any Settings per record type.



User Settings

Customer Settings

Vendor Settings

Creating Items & Item Settings

Creating New Items (and Important Notes)

- You need to create (or import) 'Items' in 1place that will be used to identify and price your company's products and services on Quotes, Sales Orders, Invoices, Credit Memo's, and POs.
    - You may be able to use 1 or more of the item import wizards to import item lists, item stock levels, item prices, item vendors, and an item search catalog. NOTE: This is usually the cause of many issues if not performed 100% correctly so we typically require (and charge your company for) first time importing if your item data.
- To manually create items click "**+**" (in top left corner) > **Item**.
- Each item needs to have its own unique Item Number.
    - It is highly recommended that your item numbers only have Letters, Numbers, Periods, and Dashes. (It is best to avoid using spaces and other special characters, such as: ' " : ; ? * ! @ # $ % ^ & ( ) , / \ { } [ ] =
- Physical, tangible items that you want to track inventory levels for need to have the **TYPE** = **Inventory**.

- Items have a field for the **LIST Price** (which is typically your HIGHEST price), and an **OEM Price** (which is just for reference).
- If you want to assign additional 'Price Levels' for an item click on the **Enter Pricing Levels** button and create as many levels as you need. Each level must have a unique name.
- Each item can have a **Search Category**, **SubCategory**, **SubCategory 2**, **SubCategory 3**, and **SubCategory 4**. These are used by the **Find Parts** screen to help narrow down the list of parts. You can also filter the item list when selecting items on a Sales Order by displaying the **Category** field (using the **Gear** button over the line items section). Certain reports make use of **Category** fields as well.
- Each item can have a '**Pricing Category**'. For example, suppose you sell car Bumpers, you could create a **Pricing Category** called Bumpers and then make 1 or more Pricing Templates and enter the Bumpers pricing category on each template and select a unique **Markup** or **Discount** for each Pricing Template.
- Each item can have a '**PO Category**'. For example, suppose you wanted to make a PO for just Lamps and Mirrors and wanted to use the **Replenish Stock tool** to only see the sales history for the Lamps and Mirrors. In this case you could create a **PO Category** called 'Lamps & Mirrors' and then make sure each item that is a Lamp or a Mirror had Lamps & Mirrors set as the PO Category.
- Each item can have an unlimited # of Vendors, with the Vendor's item #, vendor cost, vendor cubic square feet for the item box, etc
- Each item can have other settings such as:
    - **Taxable**
    - **Assembly**
    - **Serialized**
    - **Visible on eCommerce**
    - **Commissionable**
    - **Round to Case Qty on PO Batch**
    - **Order and Receive as Case on PO**
- If you plan to integrate 1place with QuickBooks Online each item can have a related QuickBooks Online Income Account, Expense Account, and Asset Account. (NOTE: Be sure to NOT turn on the QuickBooks Online syncing feature until all data and settings are 100% ready. More about QuickBooks setup below).

New Item Defaults

- There is a group of settings in the **Gear** > **Items** > **Item Settings** > **New Item Defaults** that can be set to auto fill in each time you create a new item. These fields can make your item list setting much more consistent when used. These fields include:
    - **Item Type**: Select 'Inventory' if you want 1place to track your inventory by default.
    - **Taxable**: Check this box (as the default) if the majority of your items are taxable (and just uncheck the box when adding an item that is not taxable).
    - **Special Order**: Check this box if the majority of your items are ordered at the time the Sales Order is created and not kept on hand. This option allows you to create purchase orders from the sales orders for the special order items.
    - **Location / Bin Tracking**: Check this to enable tracking of your Items' location (and which Bin) in your warehouse.
    - **Show on eCommerce**: Check if you want your Items (by default) to appear on your integrated Website.
    - **Commissionable**: Check this if you want to track commissions for your Items.
    - **Round up to Case Qty on PO Batch**: Check this if by default you want to automatically find your order UP to the next full case amount (when Creating an Auto PO).
    - **Order and Receive as Case on PO**: If you receive as a case then the 24 items in the case will appear as 1 item on your inventory.
    - **Add item to searchable Catalog**: Check this if you want all newly added items to be added to your searchable Catalog.

- **QuickBooks Income Account**: The default Income GL journal entry of your Items on QuickBooks online per sales transaction.
- **QuickBooks Expense Account**: The default Expense GL journal entry of your Items on QuickBooks online per sales transaction.
- **QuickBooks Asset Account**: The default Asset GL journal entry of your Items on QuickBooks online per purchase and receipt in your stock/inventory.

Item Preferences

- In **Settings > Items > Item Settings > Item Preferences** there is a list of Yes / No questions.
  - We stock inventory.
  - We deliver the products we sell.
  - We assemble (bundle) some of the items we sell.
  - We assemble (bundle) some of the items we sell, but need to change the components on the fly.
  - We sell some items that have a "LOT" #
  - We sell some items that have a "SERIAL" #.
  - We store (and sell) inventory in multiple warehouses.
  - We bar-code (or would like to bar-code) our inventory to scan items in and out of stock.

Item Tabs Setting

- To make **Item Tabs** to appear or disappear on the **Item Detail screen**, go to **Settings (gear icon on top right corner) > Items > Item Settings > Item Tabs** and check the box to activate the Item Tab.

Item Pricing Levels Default Setting

- To make **Item Tabs** to appear or disappear on the **Item Detail screen**, go to **Settings (gear icon on top right corner) > Items > Item Settings > Item Pricing Levels** and check the box to activate the Item Tab.

Warehouse Settings

Purchasing Settings

How to Set to Auto Sort the Line Items on a Purchase Order

- Go to **Settings (gear icon)>Purchase Orders>Other Settings (section)**.
- Select from the dropdown if you prefer them sorted in:
  - Alphabetical Order, or
  - Entry Order

How to Set to Auto Update Item Cost for the Related Vendor (When PO Cost is Changed on a PO Line Item)

- Go to **Settings (gear icon)>Purchase Orders>When PO Cost is changed on a PO Line Item (section)**.
- Select **Yes (Automatically update the item cost of the item for the related vendor. (1.1).)**
  - Select **Prompt** to get User notified when a PO Cost is changed on a PO Line Item and if they want to update the cost for the related vendor.

How to Set to Tab All Fields on the Purchase Order Screen

- When you use the **Tab Key** on your keyboard to type or enter details on the **Purchase Order screen**, you have the option on **Settings** if you want to tab ALL fields.

- To do this, go to **Settings (gear icon)>Purchase Orders>Other Settings (section)**.
- Check the '**Tab All Fields (2.3)**' box.
  - Note: Only selected fields are tabbed (the most basic information) when this box is unchecked.

How to Set the Number of Decimal Places (for Price Fields)

- Go to **Settings (gear icon)>Purchase Orders>Other Settings (section)**.
- On '**Number of Decimal Places-for Price fields (2.4)**, select from the drop down list (0-4 decimal places).

How to Set to Auto Update the List Price (on the Item Record) When List Price Field on PO is Changed

- Go to **Settings (gear icon)>Purchase Orders>Other Settings (section)**.
- On 'When List Price field on PO is changed auto update the List Price on the Item record

Sales Settings

New Customer Defaults

- To add NEW customer records more quickly and accurately using the **New Customer Defaults**:
  - Go to **Settings>Customers>New Customer Defaults (section).**
  - Key in the following information under **New Customer Defaults** to autofill these fields every time you add a new Customer.
    - **Address Type:** Bill To, Ship To or Both
    - **Customer Type:** *Create any Type name.*
    - **Customer Subtype:** *Create any Subtype name.*
    - **Shipped Via:** The shipping method.
    - **Warehouse:** The default warehouse that will be assigned to the new record.
    - **Pricing Method:** The default pricing method (Discount, Multiplier, Markup, Item Price Level)
    - **Pricing Value:**
    - **Custom Pricing Template:** Select from your Pricing Templates (created on **Sales > Pricing Templates).**
    - **Tax Exempt:** Check box if tax exempted.

New Customer 'Auto Fill' Profiles

This is an added (optional) feature that can also help you autofill various data needed on the **Add New Customer or Prospects form** every time you add a new Customer record. To do this, you must:

- Create and define your own **Customer Default Profiles.** Go to **Settings > Customers > Customer 'Auto Fill' Profiles** then click on the **New** button to add a profile.
- Key in the following information on the **Customer Default Profile popup screen:**
  - **Profile Name:** *Create any name.*
  - **Address Info:** The default City, State, Region and Country of the Customer.
  - **Shipped Via:** The default Shipping method that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
  - **Type:** The default Type of customer or prospect. This is a user definable value to help categorize, group, and classify your records.
  - **SubType:** Similar to the Type, this is a user definable value to help categorize, group, and classify your records.

    - **Tax:** The default Sales Tax code that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
    - **Tax Exempt:** Check the box if exempted from tax. This will activate the '**Reason for Exemption'** text box.
    - **Payment Terms:** The default Payment Terms that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
    - **Payment Methods:** The default Payment Method for the particular customer.
    - **Credit Limit:** The default Credit Limit that will be assigned to the particular customer.
    - **Credit Days:** The default number of Credit Days for the particular customer.
    - **Default Pricing Method:** The default method of pricing that will be assigned to the particular customer.
    - **Warehouse:** The default warehouse for the particular customer.
    - **Pricing Template:** Select from your Pricing Templates (created on **Sales > Pricing Templates).**
    - **Sync with QuickBooks Online:** Check the box to automatically sync Customers (tagged under this Default Profile) with QuickBooks Online.
- Note: You can create an unlimited number of profiles.
- Now that you have created your **Customer 'Auto Fill' Profiles,** you may use these profiles to add new Customer records faster and more accurately.
    - **On the Add New Customer or Prospects screen (when adding a new Customer)** select the Customer Default Profile Name from the **Auto Fill Profile** drop down list. All entered default settings (above) related to the selected profile will be automatically filled.

QBO Customer Types

Record Numbering

- You can set formats for your record numbering to keep your records well sorted and organized.
    - Go to Settings>System>Record Numbering
    - You may choose to set the **Number Type** either **Manual** or **Sequential**.
    - You may place a letter **Prefix** to make the record number alphanumeric (for example, 'S' for Sales Order to easily determine the type of Record).
    - Place a number code under the **Next Number** column to set the next number (if you are starting the sequential Number Type).

Sales - General Settings

Sales - Sales Taxes

Sales - Find Parts

Sales - Quotes

Sales - Sales Orders

Sales - Invoices

QuickBooks Integration

Jobs & Projects & Tasks

Item Settings

Warehouse

Purchase Orders

Customer Portal

API Settings (If Applicable)

Other Settings

Global Settings

Custom UI Design

Checking the About Screen