(003) 1place - Quick Start Guide for Warehouse Management 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 work in the **warehouse shipping** & **receiving items**.

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	Item Management	How to create Items (Parts)
101.6	Item Management	How to create Credit Memo's (or Return Authorizations).
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 Dispatch Items
103.3	Warehouse Management	How to Re-Dispatch Items
103.3	Warehouse Management	How to Return Items
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- Open your web browser and goto 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** 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 on 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).

- 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)__** by the Item / Part #.

  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**

- On the **Main Menu Bar**, click on **Warehouse < Shipping & Receiving.**

- On the **Shipping & Receiving** screen, click on **To Print & Pick** on the left side of the screen under **Items to Ship**.
- Select your **User Name**.
- Select the item/s by checking the box/es on the first column on the left.
- Click on **Print & Pick Selected** (green button, upper right part).
- The **Print Picking Documents** popup screen will be displayed.
    - NOTE: On this popup screen, you can print multiple documents simultaneously by clicking on the **drop down arrow** and selecting the document to print. If you want to edit the document format, click on the **Gear** button under **Properties** column. Click on **X** button if you want to remove the document to exclude from printing.
- Click on **Print** button.
- Click on **Save & Update Status**.
- You have just created a batch of item/s to be picked.
- NOTES
    - A Batch ID is generated by the system every time you create a Pick Ticket.
    - A User Name cannot make a new Pick ticket when it has an existing 'not finalized' Pick Ticket.

- On the **Shipping & Receiving** screen, click on **Picking** on the left side of the screen under **Items to Ship**.
- Select your **User Name**.
- If finalizing to pick ALL items for this batch, click on **Auto Select & Update All Qty Picked Values (to the Qty Shipped value)**.
    - NOTE: This action automatically changes the **Qty Picked** values to be the same as the **Qty** values. You may still change the **Qty Picked** values (cannot be greater than the **Qty** value). This will trigger the email about **Picking Problem(s) - Short Picked** to automatically popup for notification.
- If finalizing to pick selected items, check the box/es and update the **Qty Picked** field.
- Click on **Pick Completed** (green button, upper right part). Item/s will now be ready for dispatch.

- On the **Shipping & Receiving** screen, click on **To Dispatch** on the left side of the screen under **Items to Ship**.
- Select the item(s) for Dispatch by checking the box(es).
- Select **Driver Name** button under the **Select Driver** Box (upper left).
- Tick the **Circle Icon** of the corresponding date of dispatch.
- Click on **Create Dispatch #** button to generate dispatch code.
- Note: The **Shipped Via** section shows the Shipped Via buttons with # of Orders. This filter can help you with your dispatch.
- Click on **Dispatch Selected** (green button, middle right).
- **Dispatch Print Selection** screen will pop up.
    - **Dispatch #** - This is auto-filled after clicking the **Dispatch Selected** button. Note: If the screen is opened after the original dispatch has already been printed (such as if reprinting a Manifest) then you will have to input the Dispatch#.
    - **Pre-Print Options** - check to select:

        - [ ] **Auto ship any recently received back ordered items.** - Check this box if you opt to loop through all selected line items for all selected Orders for your selected Dispatch.
        - [ ] **Auto create related Invoices for Sales Orders in this Dispatch.**
        - **'Route delivery stops using'** drop down arrow - choose whether to use **Scanned Order** or **Google Maps**.
- Click on **Proceed**.
- The **Print Dispatch Documents** popup screen will be displayed.
    - NOTE: On this popup screen, you can print multiple documents simultaneously by clicking on the**drop down arrow** and selecting the document to print. Click on **X** button if you want to remove the document to exclude from printing.
- Click on **Print and Update Status**.

- On the **Shipping & Receiving** screen, click on **In Route** on the left side of the screen under **Items to Ship**.
- Select the item to be re-dispatched.
- Click on your User Name under **Select Your Name** section.
- On the **Select Dispatch Number** section, click on the drop down arrow and select the Dispatch Number of the particular item.
    - Note:The system can recall previously generated Dispatch Numbers and are sequentially listed on the drop down from latest (up) to oldest (down). This makes it easier for the user to input the code.
- On the **Move to Status** section, click on the drop down arrow and select **To Dispatch**.
- Click on **Update Selected** (green button, to the right).
- The item is now back to **'To Dispatch'** status and you may proceed to dispatch another delivery run for that item.

- **Option 1 - Find the Invoice and Return the Item (to make a related Credit Memo).**
    - Ways to find the Invoice:
        - Press **F7**, <u>or</u>
        - 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 at the bottom of the screen.
    - 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**.
    - 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**, <u>or</u>
        - 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.

- Go to the **Item Detail** screen in several ways:
  - Press **F10** and use the **Search** tab to filter and search for the Part or Item, or
  - On the **Quick Start Buttons**, click the **Search** (magnifying glass) icon then select **Items**, or
  - On the **Quick Start Buttons**, click **Find Parts.** Fill in the required information on the text boxes (**Ship To**, **Bill To**, **Year**, **Make**, **Model**, **Category**, etc.) to filter then click **Search.** Click on the **magnifying glass icon** beside the Item on the display table at the lower part of the screen, or
  - On the **Item List** screen, use the **Search** feature (magnifying glass icon) to type the Item number or any information/keywords to filter multi search then click on the **Item #**, or
  - From a **Quotation, Sales Order, Invoice, Credit Memo or Purchase Order** screen (under the **Add/Edit Line Item** table): Click on the **Magnifying Glass** button next to the selected Item Number.
- On the **Item Detail** screen, you will find several **tabs** pertaining to that particular Item.

- Go to **Item Detail** screen **> Stock** tab. Click on **Adjust Quantities in Stock** button (below left of the Stock Receipt table).
- The popup screen to **Adjust Inventory Stock** will display.
  - To Add Quantities in Stock:
    - On the **Adjust Inventory Stock** popup screen, tick the circle for **Add To Inventory**.
    - Input **Quantity** to be added.
    - Select **Warehouse** from the drop down and input **Cost**, **Bin**, **Lot** / **Serial Num**.
    - Select **Vendor**
    - You may utilize the **Log Notes** and **User Notes** to keep any related additional information.
    - Click **Save**.
  - Remove Quantities in Stock:
    - On the **Adjust Inventory Stock** popup screen, tick the circle for **Remove From Inventory**.
    - Input **Quantity** to be removed.
    - Select the **Receipt ID** on the drop down arrow. This automatically fills in the cost of the item when it was received and the Vendor.
    - You may utilize the **Log Notes** and **User Notes** to keep any related additional information.
    - Click **Save**.

- Go to **Item Detail** screen **> Stock** tab. Click on **Adjust Quantities in Stock** button (below left of the Stock Receipt table).
- The popup screen to **Adjust Inventory Stock** will display.
    - To Edit Receipt
        - On the **Adjust Inventory Stock** popup screen, tick the circle for **Edit Receipt**.
        - Select the **Warehouse (**from the drop) down.
        - Select the **Receipt ID (**from the drop down) of the item(s) that you want to edit.
        - You may edit the **Cost**, **Bin**, **Lot/Serial Num**, **Vendor** and the **Notes** sections.
        - Click **Save**.

- Go to **Item Detail** screen **> Stock** tab. Click on **Adjust Quantities in Stock** button (below left of the Stock Receipt table).
- The popup screen to **Adjust Inventory Stock** will display.
    - To Move or Transfer Item(s)
        - On the **Adjust Inventory Stock** popup screen, tick the circle for **Split Receipt Bin Location**.
        - Select the **Warehouse (**from the drop down).
        - Select the **Receipt ID (**from the drop down) of the item(s) that you want to move or transfer.
        - On the **Item Receipt Adjustment** table, select the **Warehouse** (from the dropdown) where you want to transfer/move the item(s).
        - Input **Qty to Move**, **Bin**, **Location**, **Serial #**. (Note: Click on
          

          if you need to add another transfer location.
        - Click on **Save**.

- **Option 1 - Using the Add/Edit Line Item section on Purchase Order screen**
    - On the **Purchase Order** screen (**Add/Edit Line Item** section), check the box under **Rcvd** column.
    - Click on **Commit Line Item** (red button, middle right).
    - Click on **Save** (red button, bottom right).
- **Option 2 - Using the Receive PO button**
    - On the **Purchase Order** screen, click **Receive PO** button (bottom center).
    - Click on **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.

- 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**.

- 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)

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

- 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.

- 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. This feature enables you to find a particular item on the **Find Parts** screen using a different Year, Make, Model combination.
    - Note: For faster entry (if adding another catalog entry), you may 'duplicate' a particular row by clicking on the **Duplicate Catalog** button under **Action** field. Edit necessary information then click **Save**.

Reference: All Keyboard Short-Cuts

Keywords: training sales reps auto body parts