

1place Customer Portal

Last Modified on 08/20/2026 6:08 pm EDT

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The Customer Portal gives your customers 24/7 access to everything they need—from searching parts and placing orders to managing invoices and support requests. Here's what they can do in the portal:

Search for Parts

- Customers can search your inventory using part numbers or keywords.
- View part details, including:
 - List Price
 - Your Price – automatically reflects their unique pricing settings.

Breco International - Harvey

Dashboard

Find Parts

Return a Part

Sales History

Account

Statements

Quotation

Bill To

Breco International - Harvey

2613 Pine Drive, Harvey, LA 70058, 1504390727

Ship To

Breco International - Harvey

2613 Pine Drive, Harvey, LA 70058, 1504390727

Quotation #

Q260812-00001

Sales Order #

Expiration Date

Type Of Quote

Warehouse

Quotation

Riverside

☒ Tax Exempt

Quote Date

Customer PO #

Entered By

Payment Terms

Sales Rep

Order Source

Shipped Via

Contact

Email

Job ID

09/12/2026

syntest

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Customer Portal

Add/Edit Line Item

Action	Qty Ord	Item #	Description	Unit Price	Dis %	Net Price	Line Total
III X	1	AC1000101	HONDA Accord 08-12 - X1Y	\$240.00	20.00%	\$240.00	\$240.00
III X	0						

Comments

Comments

Subtotal

\$240.00

This Customer is Tax Exempt

\$0.00

Freight

\$0.00

Total

\$240.00

Note: Quotations do NOT change inventory levels.

Create Order

Place Orders

- Submit orders directly through the portal.
- All orders instantly appear in 1place for internal processing.

Breco International - Harvey

Dashboard

Find Parts

Return a Part

Sales History

Account

Statements

Sales Order

Bill To

Breco International - Harvey

2613 Pine Drive, Harvey, LA 70058, 1504390727

Ship To

Breco International - Harvey

2613 Pine Drive, Harvey, LA 70058, 1504390727

SO #

RV-260715-0003

Invoice #

Quote #

☐ Tax Exempt

Order Date

Entered By

Customer PO #

Payment Terms

Sales Rep

Order Source

Shipped Via

Contact

Email

Job ID

07/15/2026

Syran

Net 15

zlestrachelle

Add/Edit Line Item

Action	Qty Ord	Item #	Qty Ship	Qty BO	Price Ship	Qty Rtn	Description	Unit Price	Net Price	Tax	Line Total	Est Del Date
III X	2	AC1000101	2	0	0	0	ACURA VIGOR 93-94 - Front bumper cover (GCC, prime)	\$300.00	\$240.00		\$480.00	

Delivery Info

Payment Info

Other Notes

☐ Deliver the parts to me.
 ☐ I will pick up the parts.

Sub Total

\$480.00

Tax

\$0.00

Calc Tax Code

Freight

\$0.00

Total

\$480.00

Amount Paid

\$0.00

Balance Due

\$480.00

Note: Shipped quantities on Sales Orders adjust inventory levels down.

Track Order Status

- View current status of submitted orders.
- Filter and search through past Sales Orders easily.

Search for Part:

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Request Return Authorization (RA) for the Selected Parts.

View Quotes, Orders, Invoices & More

- Full visibility into:
 - Quotes
 - Sales Orders
 - Invoices
 - Credits
 - Returns
- All lists are searchable and sortable for quick access.

Breco International

Harvey

Dashboard

Find Parts

Return a Part

Sales History

Quotations

Sales Orders

Invoices & Credits

Payments

Returns

Account

Statements

Quotation List

ALL

Batch Actions

Search

X

Search

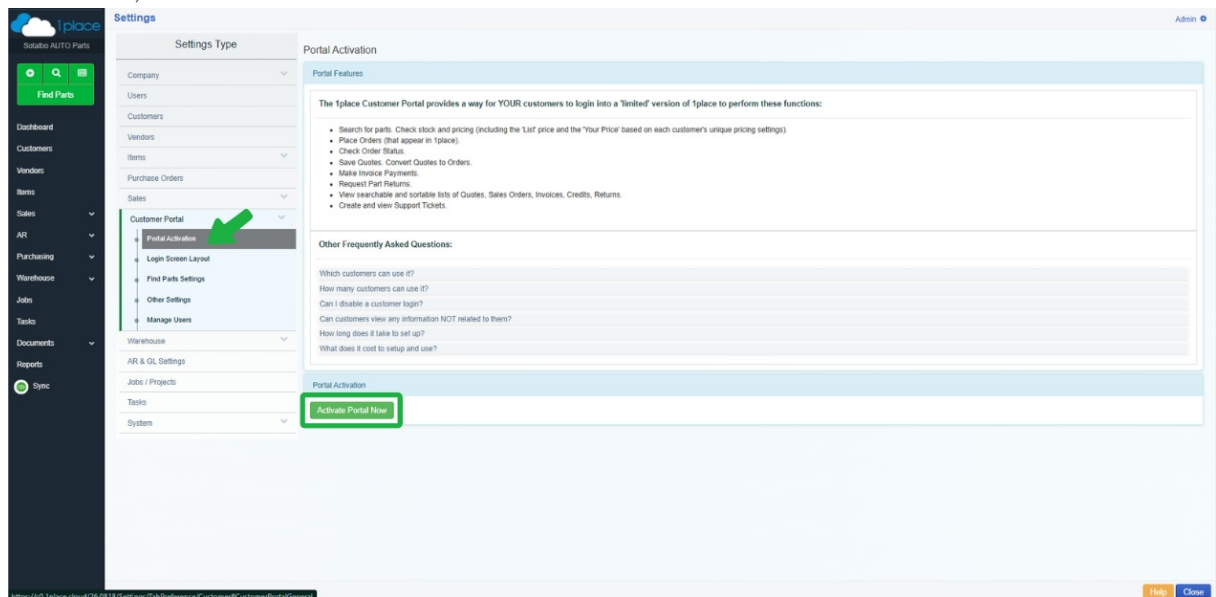
1 - 8 of 8

Create & Track Support Tickets

- Submit support tickets right from the portal.
- View ticket status and responses in real time.

- In the **dashboard**, click the **gear icon** beside your name located at the top right corner of the screen.
- Click **Settings**;

- In the Settings screen, click '**Customer Portal**' under the '**Setting Type**' list.
- Once clicked, the 'Customer Portal' field will expand and give you a list of modules to set. Click '**Portal Activation**';



- Once clicked, it will show you the 'Portal Activation' screen that has the Portal Features and other FAQ. Click the '**Activate Portal Now**' button.
- Enter the necessary information needed in the '**Portal Activation Request Form**'. Once everything is filled in and checked the check box, click '**Activate Now**'.

The screenshot shows the 'Portal Activation Request Form'. The form has a blue header with the title 'Portal Activation Request Form'. Below the header, there is a paragraph explaining the purpose of the form. The form contains several input fields: 'Your Name' (filled with 'Syron Sotalbo'), 'Your Email' (filled with 'syron@sotalboautoparts.com'), 'The Best Phone # to Reach You' (filled with '(888) 888-8888'), and 'Preferred Portal Login Name' (filled with 'sautoparts'). There is also a checkbox labeled 'I understand that to use the Portal there is a \$4,800 startup fee + a \$480 monthly hosting / support fee. I also understand that I can discontinue the service at any time, for any reason.' which is checked. At the bottom, there are three buttons: 'Cancel', 'Help', and 'Activate Now' (highlighted with a green box).

- Once done, you will now see the '**Customer Portal**' tab in your **Customer Detail** screen.

How to Access Login Screen Layout

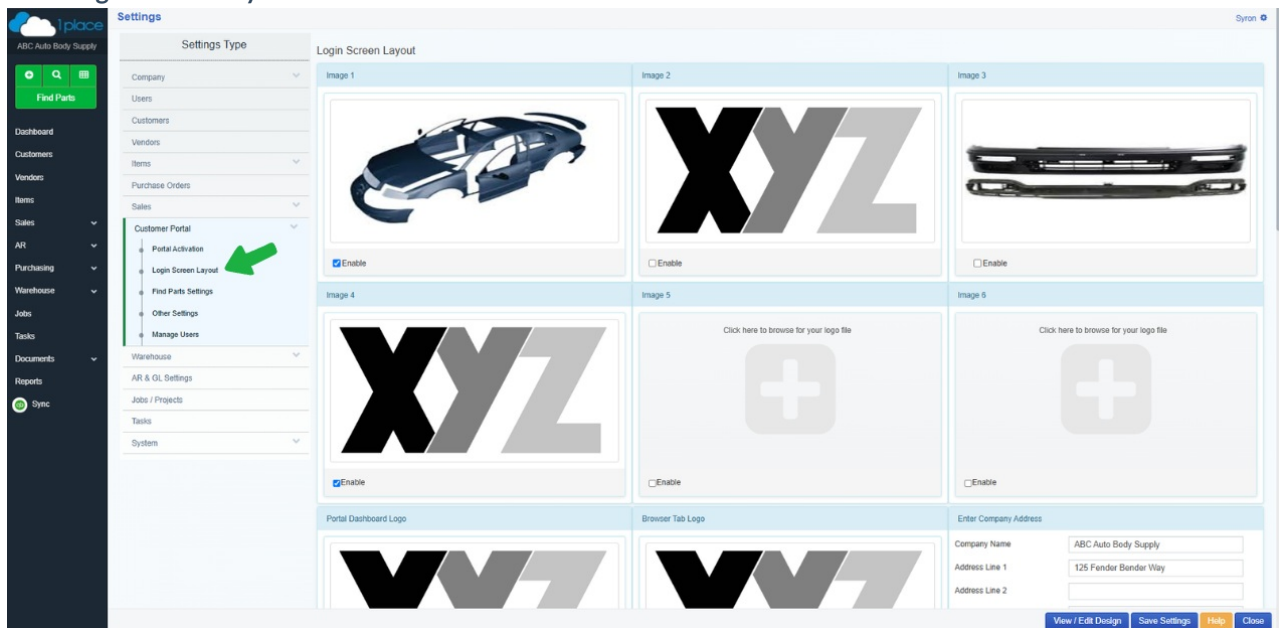
In **1place**, click the **gear icon** beside your name located at the top-right corner of the screen.

Click **Settings**.

In the **Settings** screen, select **Customer Portal** under the Setting Type list.

Click **Customer Portal** to expand the available settings.

Click **Login Screen Layout**.



Enter New User Notes Please enter the information below to create a new login. 442 characters remaining - New Line - Ctrl+Enter		Login & Signup Panel Login Panel Text Color: #000000 Signup Panel Text Color: #ffffff Login Button Color: #4785ff Login Button Text Color: #ffffff Signup Button Color: #4785ff Signup Button Text Color: #ffffff ☐ One Column Signup ☒ Two Column Signup	
Select Company Address Font And Color Text Font: Bold Font Size: 20 Text Color: #757575		Select Company Details Font And Color Text Font: Bold Font Size: 15 Text Color: #757575	
Select New User Notes Font And Color Text Font: Bold Font Size: 14 Text Color: #8a8a8a		Side Panel Setting ☒ Enable Side Panel Section Side Panels Width: 20% Side Panels Color: #000000	
Background Colors Entire Screen: #000000 Top Section: #ffffff Bottom Section: #ffffff Login Section: #8a8a8a Signup Section: #d4d4d4 ☐ Login Section Transparent ☐ Signup Section Transparent			
Youtube Link ☐ Enable YouTube Video Panel on Portal Login Screen Embedded YouTube Link: Original YouTube Link: Note: Paste the complete YouTube Embed Code obtained from YouTube --> Share --> Embed --> Copy. The system will automatically extract the original video URL from the src attribute and populate the Video URL field. Please do not paste a regular YouTube watch URL in this field.			

The 1place Customer Portal can be customized to reflect your company's branding and message. You can personalize the customer portal login page to create a more branded and welcoming experience for your customers.

1. Upload Logos

- Upload your company logo to appear on the login screen.
- Optionally, upload a secondary logo (e.g., for a parent brand or division).

2. Enter Company Details

- Add your company name, phone number, or any other contact information to be displayed on the login page.

3. Add a Custom Note

- Include a welcome message, helpful instructions, or an onboarding note for new users.

4. Modify Login and Sign-Up Panel Colors

- Choose custom colors for the login and sign-up boxes to match your brand.

5. Set Font and Text Colors

- Customize the font style and text color used across the login screen.

6. Background Color Settings

- Select background colors for:
- The overall login screen background
- The login and sign-up form background areas

7. Visual Designer: Drag-and-Drop Layout Editor

Customer Portal includes a visual editor that allows you to:

- Visually preview your login screen as you customize it.
- Drag and reposition elements such as:
 - Logos
 - Company contact details
 - Notes for new users
 - Login and sign-up panels

This intuitive layout editor ensures your login page looks exactly how you want it—without needing any coding.

8. Add a YouTube Video Panel

You can add a YouTube video to the Customer Portal login screen by enabling the **YouTube Video Panel**.

- **Enable YouTube Video Panel on Portal Login Screen** – Enable this option to display the YouTube video panel on the login screen.
- **Embedded YouTube Link** – Paste the complete YouTube **Embed Code** obtained from **YouTube → Share → Embed → Copy**.
- **Note:** Paste the complete YouTube Embed Code in this field. The system will automatically extract the original video URL from the `src` attribute and populate the **Original YouTube Link** field. **Do not paste a regular YouTube watch URL** in the Embedded YouTube Link field.
- **Original YouTube Link** – Displays the original YouTube video URL extracted from the embedded code.

How to Access Find Parts Settings

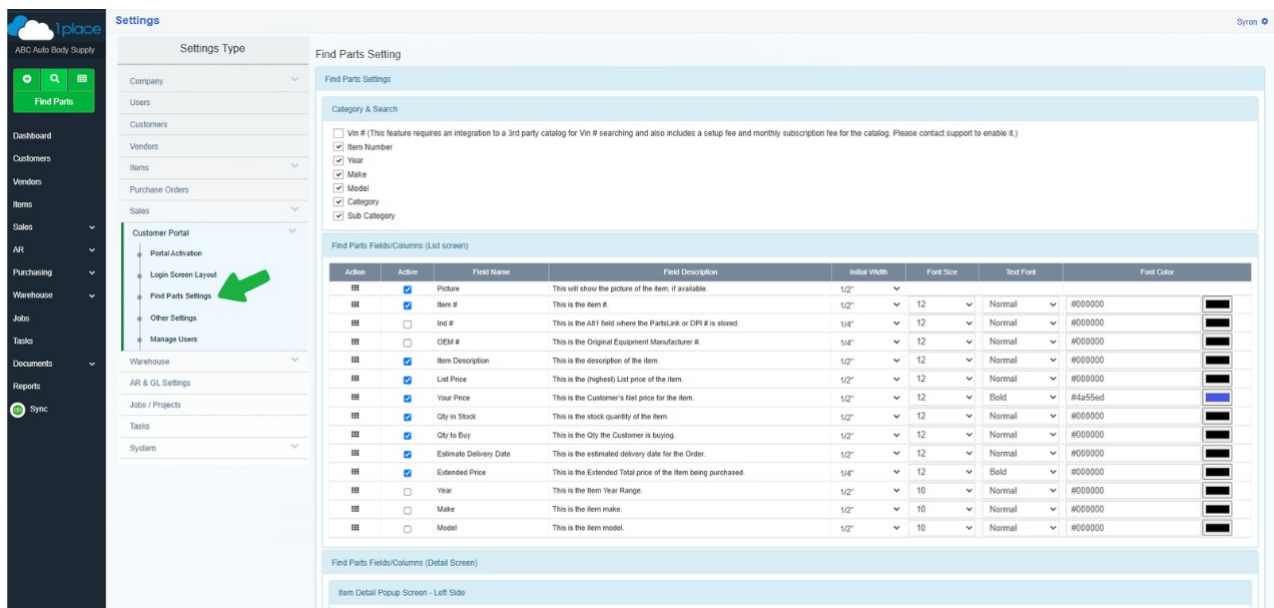
In **1place**, click the **gear icon** beside your name located at the top-right corner of the screen.

Click **Settings**.

In the **Settings** screen, select **Customer Portal** under the Setting Type list.

Click **Customer Portal** to expand the available settings.

Click **Find Parts Settings**.



The Find Parts screen in the Customer Portal can be tailored to show only the fields and columns that are most useful to your customers. These settings allow you to control both visibility and layout.

1. Select Which Fields/Columns Are Shown

- In the **settings** screen, each available field is listed in a table.
- To make a field visible to portal users, simply **check the box** beside it under the **Active** column.
- Unchecked fields will be **hidden** from the portal view.

Action	Active	Field Name	Field Description	Initial Width	Font Size	Text Font	Font Color
	☒	Picture	This will show the picture of the item, if available.	1/2"			
	☒	Item #	This is the item #.	1/2"	12	Normal	#000000
	☐	Ind #	This is the Alt1 field where the PartsLink or DPI # is stored.	1/4"	12	Normal	#000000
	☐	OEM #	This is the Original Equipment Manufacturer #.	1/4"	12	Normal	#000000
	☒	Item Description	This is the description of the item.	1/2"	12	Normal	#000000
	☒	List Price	This is the (highest) List price of the item.	1/2"	12	Normal	#000000
	☒	Your Price	This is the Customer's Net price for the item.	1/2"	12	Bold	#4a55ed
	☒	Qty in Stock	This is the stock quantity of the item.	1/2"	12	Normal	#000000
	☒	Qty to Buy	This is the Qty the Customer is buying.	1/2"	12	Normal	#000000
	☒	Estimate Delivery Date	This is the estimated delivery date for the Order.	1/2"	12	Normal	#000000
	☒	Extended Price	This is the Extended Total price of the item being purchased.	1/4"	12	Bold	#000000
	☐	Year	This is the Item Year Range.	1/2"	10	Normal	#000000
	☐	Make	This is the item make.	1/2"	10	Normal	#000000
	☐	Model	This is the item model.	1/2"	10	Normal	#000000

2. Arrange Column Order

- Use **drag-and-drop controls** under the **Action** column to arrange the columns in the desired left-to-right order on the list screen.

3. View Field Names and Descriptions

- Each field includes a **name** and a short **description** to help you understand what data it shows.
- This helps admins decide which fields are appropriate for end users.

By customizing these fields, you ensure customers only see the most relevant data when searching for parts—making the portal cleaner, more efficient, and easier to use.

Item Detail Popup Screen – Layout Settings (Left, Center, Right Panels)

The item detail popup is divided into **three panels: Left, Center, and Right**. Each panel has its own separate configuration section, but they all draw from the same list of available fields.

Action	Active	Field Name	Font Size	Text Font	Font Color
☰	☒	Picture			
☰	☐	Estimate Delivery Date	14	Normal	
☰	☐	Item #	14	Normal	
☰	☐	Ind #	14	Normal	
☰	☐	OEM #	14	Normal	
☰	☐	Item Description	14	Normal	
☰	☐	List Price	14	Normal	
☰	☐	Your Price	14	Normal	
☰	☐	Qty in Stock	14	Normal	
☰	☐	Qty to Buy	14	Normal	
☰	☐	Extended Price	14	Normal	

In each section—**Left, Center, and Right**—you will:

1. Select Which Fields Are Shown (Active Column)

- In each panel's settings, you'll see a list of all available fields.
- Use the **Active column checkbox** to choose which fields appear in that specific panel.
- You can show a field in one, two, or all three panels, depending on your needs.

2. Arrange Field Order (Action Column)

- Within each panel section, use the **Action column** to set the order in which fields appear (top to bottom).
- This is done by clicking and dragging the rows into the desired order using the **arrange icon** under the action column.

3. View Field Names

- Each field is labeled for clarity so you know what data will be shown.

4. Set Text Appearance

- Each panel has its own text styling controls, so you can define the appearance of fields per section:
 - **Font size**
 - **Font style**
 - **Font color**

This setup gives you precise control over how information is displayed in each section of the popup. Even though you're choosing from the same list of fields, the layout and styling are configured independently for the Left, Center, and Right panels.

The Warehouse Shipping Priorities section lets you define how the system chooses which warehouse to use when fulfilling customer orders. This setup ensures that inventory is sourced efficiently and in the correct order of priority.

Each row in the table represents a priority level, and you can fully control the order and warehouse logic using the options provided.

1. Arrange Priority Order (Action Column)

- **Click and drag** the rows into the desired order using the arrange icon under the action column to reorder the priority levels.
- The system will attempt to fulfill orders based on this top-to-bottom priority.

2. For Customers IN Area of Warehouse

- Use the **dropdown** to select which warehouse should be prioritized when the customer is located within that warehouse's shipping area.

3. If OUT OF Stock in Warehouse

- Select the fallback warehouse using the **dropdown**, to be used if the primary warehouse is out of stock.

4. Look Next for Inventory In Warehouse

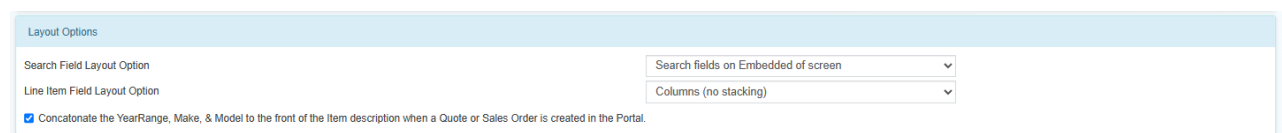
- Choose an additional warehouse the system should check next, if the first two options don't have available inventory.

5. Save Warehouse Priority

- After setting all your preferences, click the Save Warehouse Priority button located at the bottom left of the section.
- This saves your shipping logic and updates the system's fulfillment behavior.

This setup gives you full control over how inventory is sourced and ensures customers receive their orders from the most appropriate warehouse based on availability and location.

The Layout Options section allows you to control how fields are displayed in the Search and Line Item interfaces within the Customer Portal.



Layout Options

Search Field Layout Option

Line Item Field Layout Option

☒ Concatenate the YearRange, Make, & Model to the front of the Item description when a Quote or Sales Order is created in the Portal.

Search fields on Embedded of screen

Columns (no stacking)

Search Field Layout Option

This option determines how search filters are presented when customers are looking for parts.

- Choose from the dropdown:
 - Item, Year, Make, Model, Category, Sub-category
 - Item, Year, Make, Model, Category (Show Selectable List), Sub-category (Show Selectable List)

Line Item Field Layout Option

This setting controls how fields are displayed for each line item (e.g., in quotes, orders, and results lists).

- Choose from the dropdown:
 - Columns (no stocking)
 - Columns, but with Description and Item #s Stacked

These options help you tailor the customer interface for usability and clarity based on your business preferences.

The Inventory Item Settings section allows you to control how inventory availability, delivery timing, and pricing visibility behave on the Customer Portal. These settings impact how information is displayed and what purchasing rules apply.

Inventory Item Settings	
Estimated Delivery Date Format	Day / Date
Cut off time for new Orders to deliver the part(s) on the SAME DAY	12:00 am
Cut off time for new Orders to add an ADDITIONAL DAY to deliver the parts	12:00 am
Number of days to ADD to the Estimated Delivery Date if the item requires a warehouse STOCK TRANSFER	1
Text to display for Estimated Delivery Date if the item is not currently in stock	Please Call.
How to display inventory in stock	Show Actual Qty
☐ Use Vendor Qty's	
# of Days since 'QIS Last Updated' (on the Item Detail > Vendors tab)	1
# of days to ADD to the Estimated Delivery Date if the item sold is from Vendor Qty's	3
☒ Do not allow users to buy items that are OUT of stock.	
☒ Do not allow users to buy more items than what is available.	
☐ Hide items on the Find Parts screen if they have a price of \$0.00.	
☐ Hide items on the Find Parts screen if they have an no stock.	

Estimated Delivery Date Format

Choose how the estimated delivery date is displayed to customers:

- **Date** (e.g., July 25, 2025)
- **Day/Date** (e.g., Thursday, July 25)

Cut-Off Times for Delivery

Specify cut-off times (per hour) for when new orders must be placed to qualify for specific delivery windows:

- **Same-Day Delivery Cut-Off Time** - Orders placed before this time are eligible for same-day delivery.
- **Next-Day Delivery Cut-Off Time** - Orders placed before this time will be delivered the next day.

Estimated Delivery Text (Out of Stock Items)

- Enter the custom message to display when an item is not currently in stock.
 - Example: "Please Call"

Additional Days for Inter-Warehouse Transfers

- Set the **number of days to add to the estimated delivery date** if the item is being shipped from another warehouse.
 - This reflects realistic transfer time between warehouses.

How to Display Inventory in Stock (Dropdown Option)

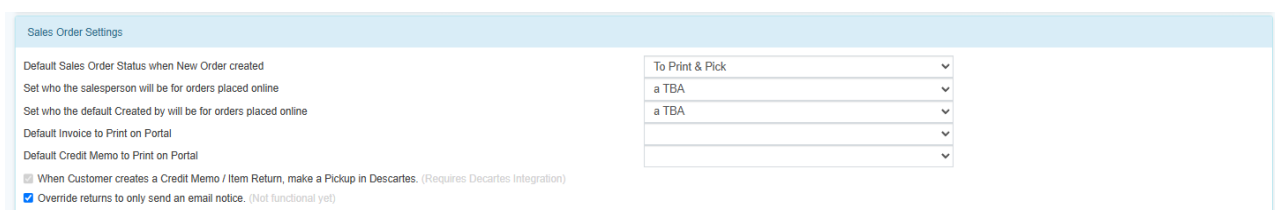
Choose how inventory levels are displayed on the portal:

- **Show actual quantity**
- **Show quantity of 1**
- **Show "In Stock"** (no quantity number shown)

Purchasing Restrictions (Checkbox Options)

- **Do not allow users to buy items that are OUT of stock** - Prevents orders on items with zero available inventory.
- **Do not allow users to buy more items than what is available** - Prevents customers from exceeding current stock levels in their order.
- **Hide items on the Find Parts screen if they have a price of \$0.00** - Useful for suppressing test items or incomplete pricing.
- **If List Price is displayed, only display List Price if an item is out of stock** - Helps reduce pricing confusion when availability is limited.

These settings allow for tight control over inventory visibility, order rules, and delivery expectations, helping you deliver a consistent and transparent customer experience.



The screenshot shows the 'Sales Order Settings' interface. It includes several configuration options on the left and a dropdown menu on the right. The options on the left are: 'Default Sales Order Status when New Order created', 'Set who the salesperson will be for orders placed online', 'Set who the default Created by will be for orders placed online', 'Default Invoice to Print on Portal', and 'Default Credit Memo to Print on Portal'. Below these are two checkboxes: 'When Customer creates a Credit Memo / Item Return, make a Pickup in Descartes. (Requires Descartes Integration)' and 'Override returns to only send an email notice. (Not functional yet)'. The dropdown menu on the right is titled 'To Print & Pick' and has four visible options: 'a TBA', 'a TBA', and two empty options.

The Sales Order Settings section controls how online orders are processed in the portal, including who is assigned to each order and how returns are handled.

Assign Salesperson for Online Orders

- Choose a default salesperson from the dropdown list of existing 1place users.
- This user will be automatically assigned to all sales orders placed through the Customer Portal.

Return Processing Options (Checkboxes)

- Automatically credit customer account when they request a return
 - Enables auto-crediting once a return request is submitted.
 - Useful for streamlining the return and credit process.
- Override returns to only send an email notice
 - Disables automatic return processing.
 - Instead, the system will simply send a notification email when a return is requested, allowing manual handling.

These settings help align the portal's order and return behavior with your internal sales and accounting processes.

This section allows you to set up alerts and restrictions that are shown to portal users based on their account status, credit limits, or IP address. These checks help enforce your credit policies while keeping users informed.

Users Checks and Warnings Settings	
Message to display if the user is overdue (Not functional yet)	
Message to display if the purchase over their credit limit (Not functional yet)	
IP Addresses to block. Enter multiple separated with a comma (Not functional yet)	None
☐ Display a message if the user has any overdue invoices on the welcome screen. (Not functional yet)	
☐ Display a message if the current order will put your user over their credit limit on the quote screen. (Not functional yet)	
☐ Stop customer from ordering if over credit limit. (Not functional yet)	

Overdue Invoice Message

- Enter the custom message to display when a user has **overdue invoices**.
- This message will be shown in the portal based on the checkbox settings below.

Credit Limit Warning Message

- Enter the message to display if the current quote or order could place the **user over their credit limit**.
- Useful for alerting users before they finalize the transaction.

Blocked IP Addresses

- Enter **IP addresses** you want to block from accessing the portal.
- Multiple IPs can be entered, **separated by commas** (e.g., 192.168.1.1, 10.0.0.1).

PDF Statement Access

- If you host PDF statements on your own server, enter the **directory or URL path** here.
- Customers will then be able to **download** their statements directly from the portal.

Warning and Restriction Options (Checkboxes)

- **Display a message if the user has any overdue invoices on the welcome screen** - Shows the overdue message immediately after login.
- **Display a message if the current order will put your user over their credit limit on the quote screen** - Warns the user during the quoting process before the order is finalized.
- **Stop customer from ordering if over credit limit** - Blocks the ability to place an order if doing so would exceed their credit limit.

These settings help ensure that your financial policies are clearly communicated and enforced, while also improving transparency for your customers.

This setting allows you to define which days of the week your business is available to process and deliver orders. The system uses this information when calculating estimated delivery dates shown to customers.

Business Day's Setting for Delivery			
☒ Monday	☒ Tuesday	☒ Wednesday	☒ Thursday
☒ Friday	☐ Saturday	☐ Sunday	

Simply **check the days your business operates and fulfills orders**.

Only the selected days will be considered eligible delivery days when the system calculates estimated delivery timeframes during ordering or quoting.

This section allows the designated admin to enter contact information that will be used for internal reference or displayed to customers where appropriate (such as in support messages or system emails).

Admin Fields to Complete:

- Your Name
- Your Email
- The Best Phone # to Reach You
- Preferred Portal Login Name

The Email Settings section must be completed to enable SMTP (Simple Mail Transfer Protocol), which allows the Customer Portal to send automated emails (e.g., order confirmations, password resets, and return notifications).

Required Fields:

- E-Mail Provide
- Outgoing Mail Server
- Outgoing Server Port
- Email Address
- Password
- Enable SSL

After entering your email configuration, click the **Test Connection** button to verify that the SMTP setup is working properly.

The system will attempt to send a test email. If successful, you'll see a confirmation message. If there's an error, check your credentials, server settings, and SSL option.

The Email Templates section allows you to create and manage reusable email templates for automated messages sent through the portal.

Creating a New Template

- Click the New Template button.
- A pop-up window will appear where you can fill out:
 - Template Name – internal reference for the template
 - From Address – the email address the message will be sent from
 - Subject – the subject line of the email
 - Body – the main message content (can include dynamic fields, if supported)
- Click Save to store the template.

Editing an Existing Template

To edit an existing template:

- Locate it in the list of templates.
- Click the Edit button under the Action column.
- A pop-up will open where you can update the From Address, Subject, or Body.
- Save your changes once editing is complete.

This section allows you to specify internal email addresses that will receive automated notifications when key customer actions occur in the Customer Portal.

How to Enter Email Addresses:

For each type of notification below, you can enter one or more email addresses.
To send notifications to multiple recipients, separate each email with a comma.

Notification Types:

- **New Customer Sign-Ups** - Notifies your team when a customer registers on the portal.
- **New Orders** - Sends an alert each time a customer places an order.
- **Potential Customer Abuse** - Alerts your team if suspicious or potentially abusive activity is detected.
- **Customer Part Returns** - Notifies you when a customer submits a part return request.

This section controls which automated emails the Customer Portal sends to your customers, and allows you to choose which email templates are used for each type.

Email Triggers (Checkboxes):

- Send email Quote Confirmation to the user who created the Quote.
- Send email Order Confirmation to the user who created the Sales Order.

When these options are enabled, customers will receive email confirmations automatically after submitting quotes or placing orders.

Email Template Selection

For each type of customer-facing email, you can select a pre-created template from the list of email templates:

- Select Quote Confirmation Email Template
- Select Sales Order Confirmation Email Template
- Select New User Sign Up Email Template
- Select User Activation Email Template

These templates define the subject, message body, and sender information used in each customer notification.

This setting enables real-time credit card transactions through your integrated eBizCharge.com account.

Option Available:

Enable real-time eBizCharge.com Credit Card Authorizations

When checked, the portal will authorize customer credit card payments in real time during checkout using your eBizCharge integration.

Be sure your eBizCharge account is properly connected to 1place for this feature to work correctly.

This section allows you to customize messages that appear to customers during key interactions within the Customer Portal.

New User Signup Landing Message

- A message shown to customers immediately after they sign up for a portal account. (Text box – up to 500 characters)
- Use this to welcome users, provide next steps, or direct them to resources.

Return Policy

- Enter your company's return policy to be shown on the portal where applicable (e.g., during part return requests).

Follow these steps to invite a customer to access the 1place Customer Portal:

1. In the 1place **Dashboard**, click **Customers** in the left navigation pane.
 2. Select the **customer's name** from the **Customer List**.
 3. Go to the **Customer Portal tab**.
 4. Then click on the **Portal Users** tab.
 5. Enter the user's **email address** and **username**.
- Make sure the email address is correct, as this will be used for sending the portal invite.
 - Once the information is filled in, click **Send Invite** under the **Actions column** to send an activation email to the customer.

The user will receive an email with a link to activate their Customer Portal account./

If you'd prefer to activate a portal user account yourself, without sending an email invite:

1. Click the **Activate Manually** button in the **Actions column**.
2. You will be prompted to enter a **temporary password** for the user.
3. After entering the password, click **Save**.
4. A **confirmation pop-up** will appear once the activation is complete.

Your customer can now log in to the portal using their email and the temporary password you provided. It's recommended that customers change their password after first login.

If a customer no longer needs access to the Customer Portal, you can disable or delete their login.

Steps:

1. In the 1place **Dashboard**, click **Customers** in the left navigation pane.
2. Select the **customer's name** from the **Customer List**.
3. Go to the **Customer Portal tab**.
4. Then click on the **Portal Users tab**.
5. Locate the **portal user** you want to manage.
6. Under the **Actions column**, click either:
 - **Disable** – Temporarily disables the user's portal access without deleting their information.
 - **Delete** – Permanently removes the user's portal login.

Note: Deleting a portal user is irreversible. Only disable if you may need to restore access later.

1. Share your **portal web address** with your customers (e.g., abcautobodysupply.1place.cloud).
2. On the portal login screen, they should find and complete the **Sign Up** form, which asks for:
 - **Company**

- **First Name**
 - **Last Name**
 - **Street**
 - **City**
 - **State**
 - **Zip/Postal Code**
 - **Phone**
 - **Email/Login**
 - **Choose Password**
 - **Confirm Password**
- Once all fields are completed, they click **Submit**.
 - A **confirmation message** will appear:
"Your request has been successfully submitted. We will email you login information asap."

Once a customer signs up through the portal, follow these steps to review and approve their access:

1. In the 1place **Dashboard**, click the **gear icon** in the upper-right corner, then select **Settings**.
2. Under **Setting Type**, click **Customer Portal** to expand the options, then select **Manage Users**.
3. Go to the **Customer Portal New Sign Ups to Link & Approve** section.
4. You'll see a list of all new customer sign-ups.
5. In the **Select Company Name** column, use the **dropdown** to link the new user to the **correct customer account in 1place**.
6. Review the **First Name**, **Last Name**, and **Email Address** entered during sign-up.
7. If the user should be granted access (e.g., verified by management and linked to the correct company), click **Approve**.
 If not approved, click **Delete Sign Up** to remove the request.

Repeat the process for the rest of the pending sign-ups.

Below the Customer Portal New Sign Ups to Link & Approve section, you'll find a list of all existing customer portal logins.

This list displays the following information:

- Customer Name
- Username
- Email Address

- Login Status (e.g., Active, Inactive)
- Approved By (the admin who approved the login)
- Date Approved

Under the Actions column, you can:

- Send Invite to users who haven't activated their account
- Disable an active login
- Delete a login entirely
- Activate Manually if you prefer to bypass email invitation

Use this section to monitor and manage customer portal access at any time.

To access the Customer Portal, your customer should:

1. Open a **web browser** (preferably Google Chrome).
 2. Go to your company's portal address (e.g., abcautobodysupply.1place.cloud).
 3. On the login page, locate the Customer Login section.
 4. Enter their Email Address and Password, then click Login.
 5. Once logged in, they will be directed to the Find Parts screen.
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