

1place - Practice Scenarios (for Auto Body Supply Companies)

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Practice Scenario ID	System Area	Practice Scenario
	Quick Start	Watch the Introduction to 1place Training Video (high level how to O
	Quick Start	If you are a Sales or Customer Service Rep, OPEN and REVIEW the 1p
	Quick Start	If you are a Purchasing and Inventory List Manager, OPEN and REVIE
	Quick Start	If you are a Warehouse Manager or Warehouse Worker, OPEN and R
	Quick Start	If you are in the Accounting Department, OPEN and REVIEW the 1pla
	Customers	WATCH training video of how to use the Customers screen.
	Customers	CREATE 1 or more Test Customer's using the + Menu (button).
	Customers	ASSIGN Default Pricing to a Customer (while making, or after made).
	Customers	ASSIGN a Pricing Template to a Customer (while making, or after mad
	Customers	CREATE 1 or more Contact's on a Test Customer.
	Customers	CREATE 1 or more Tasks related to a Contact (on the Customer Conta
	Customers	CREATE 1 or more Tasks on the Task List screen.
	Customers	Update 1 Customer Information while Taking Order
	Customers	How does linking two companies work?
	Customers	Where do I check the previous purchases of my customer?
	Customers	Logging Customer Interactions and Notes
	Customers	Flagging a Customer for Special Handling (special notes,tags)
	Customers	Managing Duplicates in the Customer Database
	Customers	Archiving or Inactivating a Dormant Customer
	Find Parts (Auto)	WATCH training video of how to use the Find Parts screen.
	Find Parts (Auto)	CREATE 1 or more Test Customers using Find Parts screen.
	Find Parts (Auto)	REVIEW all the buttons, fields, and features on the Find Parts screen.
	Find Parts (Auto)	CREATE 5 or more Quotes using Find Parts screen.
	Find Parts (Auto)	CREATE 5 or more Sales Orders using the Find Parts screen.
	Find Parts (Auto)	OPEN a Customer record from the Find Parts screen.
	Find Parts (Auto)	OPEN an Item record from the Find Parts screen.
	Find Parts (Auto)	How can I search for a Customer without the Company Name?
	Find Parts (Auto)	How does the VIN # Search works?
	Find Parts (Auto)	How to do a search of item in the Find Parts Screen?
	Find Parts (Auto)	How do I hide some of the columns on the Find Parts Screen?
	Find Parts (Auto)	
	Find Parts (Auto)	
	Find Parts (Wholesale)	
	Find Parts (Wholesale)	
	Find Parts (Wholesale)	
	Find Parts (Wholesale)	
	Quotes	CREATE 1 or more Quotes using the + Menu (button).
	Quotes	CREATE 1 or more Test Customers using the Quotes screen.
	Quotes	CREATE 1 or more Quotes by 'duplicating' another Quote on the Quo

Quotes	REVIEW all the buttons, fields, and features on the Quotes screen.
Quotes	EDIT 1 or more (line items) ' Item Number ' on the Quote screen.
Quotes	EDIT 1 or more (line items) ' Item Description ' on the Quote screen.
Quotes	EDIT 1 or more (line items) ' Net Price ' on the Quote screen.
Quotes	EDIT 1 or more (line items) ' Discount ' on the Quote screen
Quotes	DELETE 1 more Quote LINE ITEMS on the Quote screen.
Quotes	DELETE 1 or more Quotes using the Quote screen.
Quotes	CREATE a Follow Up task on the Quotes screen (using the Follow Up button)
Quotes	PRINT 1 or more Quotes.
Quotes	EMAIL 1 or more Quotes.
Quotes	(Admin) MODIFY the Quote printing properties (using the Print > Gear icon)
Quotes	
Sales Orders	Create 1 or more Test Customer's using Sales Order screen.
Sales Orders	Create 1 or more Sales Orders using the + Menu.
Sales Orders	Create 1 or more Sales Orders using the Find Parts screen.
Sales Orders	Create 1 or more Sales Order from the Quotes screen.
Sales Orders	Edit 1 or more Sales Order line items.
Sales Orders	Delete 1 or more Sales Orders on the Sales Order screen.
Sales Orders	Open a Customer record from the Sales Order screen.
Sales Orders	Open an Item record from the Sales Order screen.
Sales Orders	Create a NEW PO for 1 or more items on Sales Order (with PO checkbox checked)
Sales Orders	Add 1 or more items on Sales Order (with PO checkbox checked) to an existing PO
Sales Orders	Enter a Payment (Sales Order Deposit) on a on a Sales Order.
Sales Orders	Email 1 or more Sales Orders.
Sales Orders	Handling Tax-Exempt Customers
Sales Orders	Checking Inventory Across Multiple Warehouses While Ordering
Invoices	Create 2 or more Invoices using the Sales Order screen.
Invoices	Delete 1 or more Invoices on the Invoice screen.
Invoices	Enter a Payment on an Invoice.
Invoices	Create a Credit Memo by returning 1 item on an Invoice.
Invoices	Spend time reviewing ALL the buttons, fields, and features on the Invoice screen
Invoices	Print 1 or more Invoices.
Invoices	Email 1 or more Invoices.
Invoices	Create 1 or Credit Memo's by returning 1 or more items on Invoice screen
Invoices	Receive Payment on the Invoice Screen
Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (using the Invoice screen)
Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (using the Invoice screen)
Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (using the Invoice screen)
Credit Memo's	Create 1 or more Credit Memo's by returning ALL items on an Invoice
Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (marking the item as returned)
A-Z Scenarios	Creating, Invoicing, Delivering an Order.
A-Z Scenarios	
Searching	Spend time reviewing ALL the buttons, fields, and features on the Sales Order screen
List Screens	Searching
Warehouse Management/Scanning	Receive 1 or 2 PO (to the Dock) without scanning each item.
Warehouse Management/Scanning	Receive 1 or 2 PO (to the Dock) by scanning each item.
Warehouse Management/Scanning	Move Dock 5 Items to Bins
Warehouse Management/Scanning	Assign 5 items and Print Labels for a stock picker in 1place

Warehouse Management/Scanning	Pick 5 items assigned to you (to your own cart)
Warehouse Management/Scanning	Pick 2 items for order transfers.
Warehouse Management/Scanning	Transfer 2 items from your cart to dock staging area.
Warehouse Management/Scanning	Receive 2 Order Transfers to Dock
Warehouse Management/Scanning	Receive 2 Order Transfers to Dock Staging Bins
Warehouse Management/Scanning	Load 2 Items in Staging Bins to Truck
Warehouse Management/Scanning	Check Inventory (Quantity and Locations) of 3 Items.
Warehouse Management/Scanning	Check the items on the dock.
Warehouse Management/Scanning	Submit a credit request for a return for a customer.
Warehouse Management/Scanning	Authorized a credit request for a return for a customer.
Warehouse Management/Scanning	Inspect an item for return
Warehouse Management/Scanning	Put away an item returned
Warehouse Management/Scanning	Move 3 inventory items to a different bin