

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

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Practice Scenario ID	System Area	Practice Scenario	Type	Additional Help (KBA - Knowledge Base Articles)	Additional Help (Training Videos)	Length
	Quick Start	Watch the Introduction to 1place Training Video (high level how to OPEN and USE 1place).				
	Quick Start	If you are a Sales or Customer Service Rep, OPEN and REVIEW the 1place - Quick Start Guide for Sales & Customer Service personnel.	Overview	1place - Quick Start Guide for Sales & Customer Service Personnel		
	Quick Start	If you are a Purchasing and Inventory List Manager, OPEN and REVIEW the 1place - Quick Start Guide for Purchasing & Inventory personnel.	Overview	1place - Quick Start Guide for Purchasing & Inventory Personnel		
	Quick Start	If you are a Warehouse Manager or Warehouse Worker, OPEN and REVIEW the 1place - Quick Start Guide for Warehouse Management personnel.	Overview	1place - Quick Start Guide for Warehouse Management Personnel		
	Quick Start	If you are in the Accounting Department, OPEN and REVIEW the 1place - Quick Start Guide for AR, AP, Banking & GL personnel.	Overview	1place - Quick Start Guide for AR, AP, Banking, GL Personnel		
	Customers	WATCH training video of how to use the Customers screen.	Long		Overview of the Customer List and Detail Screen	00:03:07
	Customers	CREATE 1 or more Test Customer's using the + Menu (button).	Long	How to Add a New Customer Record	Create a New Customer Record using the + Menu	00:00:16

					Button	
	Customers	ASSIGN Default Pricing to a Customer (while making, or after made).	Long	Select a Default Pricing Method		
	Customers	ASSIGN a Pricing Template to a Customer (while making, or after made).	Long	Add Customer Pricing Template		
	Customers	CREATE 1 or more Contact's on a Test Customer.	Short	Add a contact record	How to add a new contact on a customer record.	00:01:04
	Customers	CREATE 1 or more Tasks related to a Contact (on the Customer Contact tab).	Short	Create a Task related to a Customer	How to create a new task related to a customer	00:01:15
	Customers	CREATE 1 or more Tasks on the Task List screen.	Short	How to Add a New Task Record	How to Create a New Task on 1place	00:01:11
	Customers	Update 1 Customer Information while Taking Order	Short	How to Update Customer Information while Taking Order	How to Update Customer Information while Taking Order	00:01:50
	Customers	How does linking two companies work?				
	Customers	Where do I check the previous purchases of my customer?		Customer Sales History		
	Customers	Logging Customer Interactions and Notes		Customer 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.			VIDEO: Using the Find Parts Screen	
	Find Parts (Auto)	CREATE 1 or more Test Customers using Find Parts screen.	Short	Create New Customer using the Find Parts Screen	Create New Customer using the Find Parts Screen	00:04:08
				Find Parts		

	Find Parts (Auto)	REVIEW all the buttons, fields, and features on the Find Parts screen.	Long	screen (Automotive - Year, Make, Model format) - How To's	Using the Find Parts Screen	00:04:08
	Find Parts (Auto)	CREATE 5 or more Quotes using Find Parts screen.	Long	Create Quotes using the Find Parts Screen	How to Use the Find Parts Screen	00:04:08
	Find Parts (Auto)	CREATE 5 or more Sales Orders using the Find Parts screen.	Short	Create a Sales Order using the Find Parts Screen	How to Use the Find Parts Screen	00:04:08
	Find Parts (Auto)	OPEN a Customer record from the Find Parts screen.	Short	How can I open a customer record from the Find Parts Screen?	Opening a Customer Record from the Find Parts Screen	00:04:08
	Find Parts (Auto)	OPEN an Item record from the Find Parts screen.	Short	How can I open an Item record from the Find Parts screen?	Opening an Item Record from the Find Parts Screen	00:04:08
	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).	Short	How to Create a New Quote using the + Menu Button	How to Create a New Quote using the + Menu button	
	Quotes	CREATE 1 or more Test Customers using the Quotes screen	Short	How to add a new customer on the Sales	Add New Customer on the Quotation	

		screen.		Quotes Screen	Quotation Screen	
	Quotes	CREATE 1 or more Quotes by 'duplicating' another Quote on the Quote .	Short	How to Duplicate an Existing Quote		
	Quotes	REVIEW all the buttons, fields, and features on the Quotes screen.	Long	Overview of the Sales Quotes Screen	How to Use the Quotation Screen	
	Quotes	EDIT 1 or more (line items) ' Item Number ' on the Quote screen.	Short	How to Edit 'Item Number' on the Quote screen.	Adding Items to your Quotation	
	Quotes	EDIT 1 or more (line items) ' Item Description ' on the Quote screen.	Short	How to Edit 'Item Description' on the Quote screen.		
	Quotes	EDIT 1 or more (line items) ' Net Price ' on the Quote screen.	Short	How to Edit the Net Price of an Item on the Quote Screen		
	Quotes	EDIT 1 or more (line items) ' Discount ' on the Quote screen	Short	How to Edit the Discount % of an Item on the Quote Screen		
	Quotes	DELETE 1 more Quote LINE ITEMS on the Quote screen.	Short	How to Delete a Line Item on the Quote Screen	Arrange or Remove Items on the Quote	
	Quotes	DELETE 1 or more Quotes using the Quote screen.	Short	How to Delete a Quote on the Quote Screen	Delete the Quotation	
	Quotes	CREATE a Follow Up task on the Quotes screen (using the Follow Up button).		Available Soon		
	Quotes	PRINT 1 or more Quotes.	Short	How to Print a Quote on the Quote Screen	Print a Copy of the Quotation	
	Quotes	EMAIL 1 or more Quotes.	Short	How to EMAIL Records (such as Quotes, Sales Orders, Invoices)	Send an email copy of the quote	
	Quotes	(Admin) MODIFY the Quote printing properties (using the Print > Gear Icon).	Long	Modify the Quote Printing Properties		
	Quotes					
		Create 1 or more Test		How to Add a New Customer	Add a New Customer	

	Sales Orders	Customer's using Sales Order screen.	Short	Record on the Sales Order Screen	Record from the Sales Order Screen	
	Sales Orders	Create 1 or more Sales Orders using the + Menu.	Short	How to Add a New Sales Order Record	Several Ways to Create A New Sales Order	
	Sales Orders	Create 1 or more Sales Orders using the Find Parts screen.	Long	How to Create a New Sales Order Record from the Find Parts Screen	Several Ways to Create A New Sales Order	
	Sales Orders	Create 1 or more Sales Order from the Quotes screen.	Short	How to Create a New Quote from the Quotes Screen		
	Sales Orders	Edit 1 or more Sales Order line items.	Short	How to Add/Edit Sales Order Line Item/s	Add Items on the Sales Order	
	Sales Orders	Delete 1 or more Sales Orders on the Sales Order screen.	Short	How to Delete Sales Order/s Record	Arrange or Remove Item	
	Sales Orders	Open a Customer record from the Sales Order screen.	Short	How to Open a Customer Record on the Sales Order Screen		
	Sales Orders	Open an Item record from the Sales Order screen.	Short	How to Open a Item Record on the Sales Order Screen	Open Customer Record from the Sales Order Screen	
	Sales Orders	Create a NEW PO for 1 or more items on Sales Order (with PO checkbox checked).	Short	How To Create Purchase Order/s from Sales Order Screen		
	Sales Orders	Add 1 or more items on Sales Order (with PO checkbox checked) to an 'Existing' (Blanket) PO.		Available Soon		
	Sales Orders	Enter a Payment (Sales Order Deposit) on a on a Sales Order.	Short	How to Apply a Deposit/ Pre-Payment on a Sales Orde		
	Sales Orders	Email 1 or more Sales Orders	Short	How to Send an Email Copy of a		

	Sales Orders	Email 1 or more Sales Orders.	Short	Email Copy of a Sales Order		
	Sales Orders	Handling Tax-Exempt Customers				
	Sales Orders	Checking Inventory Across Multiple Warehouses While Ordering	Short			
	Invoices	Create 2 or more Invoices using the Sales Order screen.	Short	How to Create Invoice from Sales Order Screen		
	Invoices	Delete 1 or more Invoices on the Invoice screen.	Short	How to Delete Invoice/s Record		
	Invoices	Enter a Payment on an Invoice.	Long	How to Enter a Payment on an Invoice		
	Invoices	Create a Credit Memo by returning 1 item on an Invoice.	Long	How to Return 1 or More Items on an Invoice		
	Invoices	Spend time reviewing ALL the buttons, fields, and features on the Invoice screen.	Long	Overview of the Invoice Screen		
	Invoices	Print 1 or more Invoices.	Short	How to Print, Email, and Download Invoice/Credit Memo Report(s) & Record(s)		
	Invoices	Email 1 or more Invoices.	Short	How to Print, Email, and Download Invoice/Credit Memo Report(s) & Record(s)		
	Invoices	Create 1 or Credit Memo's by returning 1 or more items on Invoice screen.	Long	How to Return 1 or More Items on an Invoice		
	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--after the Invoice is Paid).	Short	How do I create one or more Credit Memos by returning a single item after the invoice has already been paid (using the Invoice screen)?		
				How do I create one or more		

	Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (using the Invoice screen--before the Invoice is Paid).	Short	Credit Memos by returning a single item before the invoice is paid (using the Invoice screen)?		
	Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (using the Invoice screen--before the Invoice is Paid, and zero out the Price for the Item on the Invoice or Credit Memo--to keep a paper trail WITHOUT actually giving the Customer Credit for something they didn't actually pay for.)	Short	How do I create a Credit Memo for a returned item before the invoice is paid, without issuing credit (by zeroing out the price to keep a paper trail)?		
	Credit Memo's	Create 1 or more Credit Memo's by returning ALL items on an Invoice (using the Invoice screen--after the Invoice is Paid).	Short	How do I create one or more Credit Memos by returning all items on an invoice after the invoice has been paid (using the Invoice screen)?		
	Credit Memo's	Create 1 or more Credit Memo's by returning 1 item (marking the item as received but not allowing it to be put back into stock, assuming it is broken or damaged).	Short			
	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.		How to Receive a PO (to the Dock) WITHOUT Scanning Each Item		
	Warehouse Management/Scanning	Receive 1 or 2 PO (to the Dock) by scanning each item.		How to Receive a PO (to the Dock) by Scanning Each Item		

	Warehouse Management/Scanning	Move Dock 5 Items to Bins		How to Move Dock Items to Bins		
	Warehouse Management/Scanning	Assign 5 items and Print Labels for a stock picker in 1place		How to Assign Items & Print Labels for a Stock Picker in 1place		
	Warehouse Management/Scanning	Pick 5 items assigned to you (to your own cart)		How to Pick Items Assigned to Me (to my own Cart)		
	Warehouse Management/Scanning	Pick 2 items for order transfers.		How to Pick Items for Order Transfers		
	Warehouse Management/Scanning	Transfer 2 items from your cart to dock staging area.		How to Transfer Items From my Cart to Dock Staging Area		
	Warehouse Management/Scanning	Receive 2 Order Transfers to Dock		How to Receive Order Transfers to Dock		
	Warehouse Management/Scanning	Receive 2 Order Transfers to Dock Staging Bins		How to Receive Order Transfers to Dock Staging Bins		
	Warehouse Management/Scanning	Load 2 Items in Staging Bins to Truck		How to Load Items in Staging Bins to Truck		
	Warehouse Management/Scanning	Check Inventory (Quantity and Locations) of 3 Items.		How to Check Inventory (Quantities & Locations)		
	Warehouse Management/Scanning	Check the items on the dock.		How to See All Items on the Dock		
	Warehouse Management/Scanning	Submit a credit request for a return for a customer.		How to Request a Credit (for a Customer)		
	Warehouse Management/Scanning	Authorized a credit request for a return for a customer.		How to Authorize Credit (for a Customer)		
	Warehouse Management/Scanning	Inspect an item for return		How to Inspect Item Returns		
	Warehouse Management/Scanning	Put away an item returned		How to Put Away Item Returns		
	Warehouse Management/Scanning	Move 3 inventory items to a different bin		How to Move Inventory Items		

