1place Scan - How To's (Incomplete)

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About 1place Scan

The **1place Scan** application is a mobile companion to the 1place system, built for **fast, accurate warehouse and inventory operations**. It allows warehouse teams to perform essential tasks with **barcode scanning** or manual item entry — keeping inventory updated in real time and streamlining day-to-day processes.

Key Features:

- **Check Stock** — View item availability, bin locations, and warehouse stock.
- **Shipping** — Pick items (from bins to cart, to staging, and load to truck) for both customer orders and order transfers.
- **Receiving** — Receive purchase orders, returns, and incoming order transfers.
- **Inventory** — Perform inventory counts, bin transfers, move dock items to bins, and view bin contents.

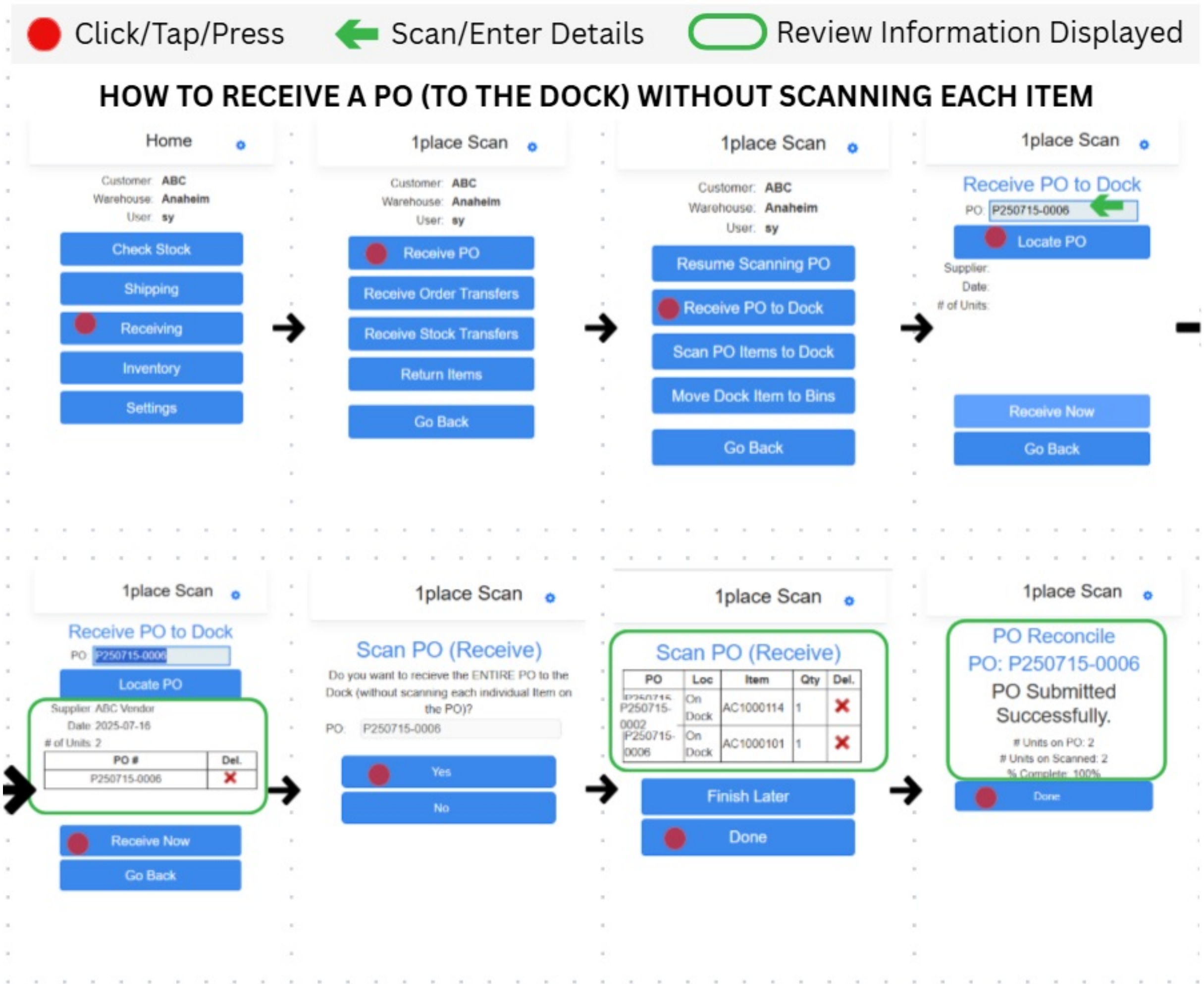
With 1place Scan, your team can handle critical inventory tasks right on the warehouse floor — quickly, reliably, and with confidence.

Here's how to receive a PO to the dock in 1place using OS Scan:

1. From the Home Screen, click **Receiving** and select **Receive PO to Dock**.
2. In the **PO: field**, enter the **PO number** and click **Locate PO**.
3. Review the displayed information: **Supplier, Date**, and **Number of Units**/Items on the PO.
4. Click **Receive Now.**
5. On the next screen, click **Yes** to receive the entire PO to the dock.
6. Review the displayed list of items included in the PO.
7. The system will reconcile and display a confirmation message:
   PO Submitted Successfully
   # Units on PO:
   # Units Scanned:
   % Complete: 100%
8. Click **Done** again to complete the process
9. You can now continue receiving another PO or move on to other tasks in 1place.

Here's a screen-by-screen summary of the process:

1.



Here's how to receive a PO to the dock in 1place using OS Scan:

1. From the Home Screen, click **Receiving** and select **Receive PO to Dock**.
2. In the **PO: field**, enter the **PO number** and click **Locate PO**.
3. Review the displayed information: **Supplier, Date**, and **Number of Units**/Items on the PO.
4. Click **Receive Now** to start scanning.
5. On the next screen, click **NO** to receive PO to the dock by **scanning each item**.
6. Start scanning each item:
   - If you have a physical scanner, scan each item. If not, manually enter the **Item Number** and press **Enter** to simulate a scan.
7. As you scan, each item will appear in a table showing:
   - **Location** where the item will be placed

- Item Number
- Quantity
- A Delete(**x**) button to remove any mistakes

8. After scanning all the items on the PO, click **Done**.
9. The system will reconcile and display a confirmation message:
   PO Submitted Successfully
   # Units on PO:
   # Units Scanned:
   % Complete: 100%
10. Click **Done** again to complete the process
11. You can now continue receiving another PO or move on to other tasks in 1place.

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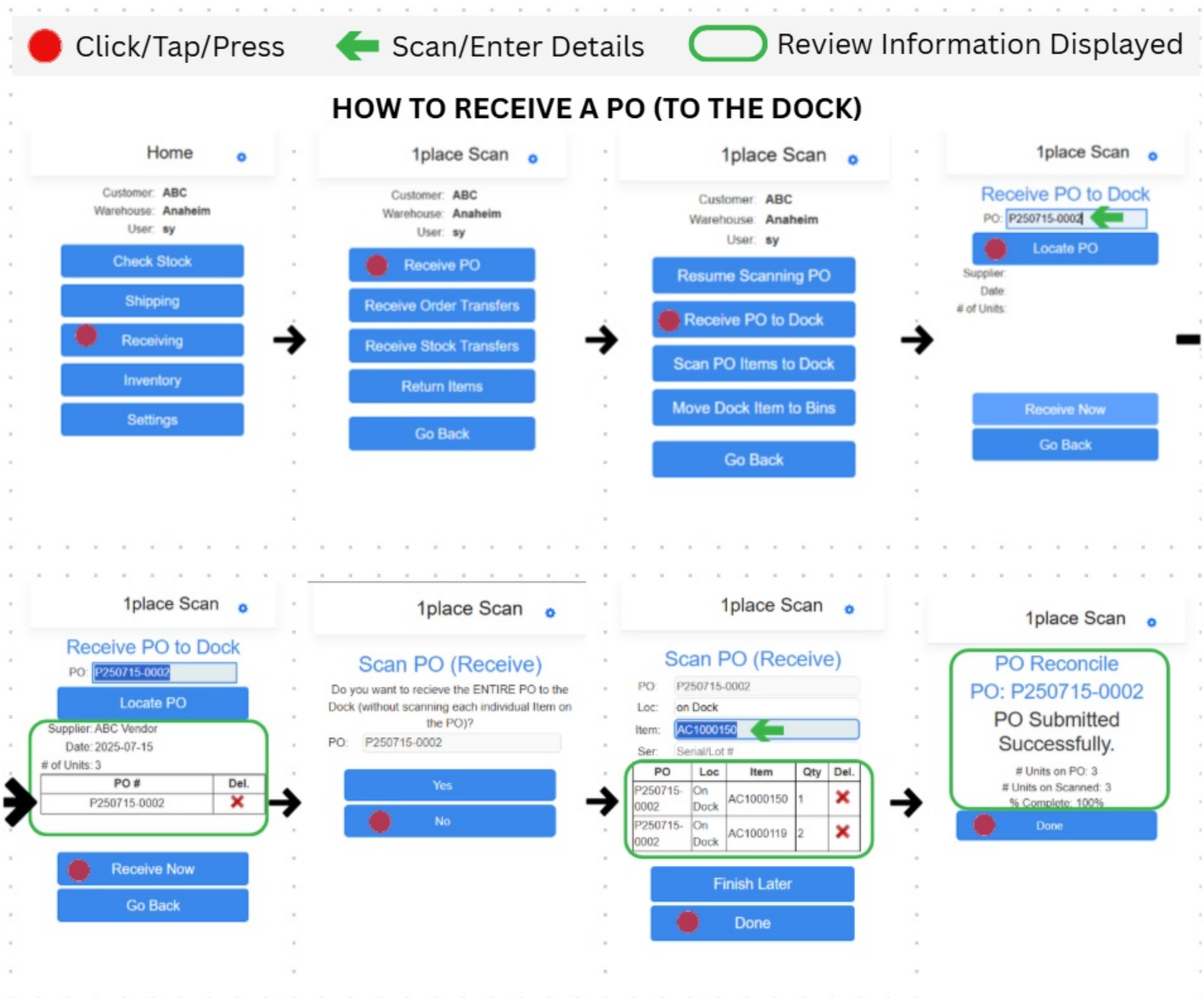


Here's how to move dock items to bins in 1place using OS Scan:

1. From the Main Screen, click **Receiving**, then select **Put Dock Items in Bins**.
2. You will see the **current location** of the item — this will show as **On Dock**.
3. Scan the item using a scanner device.
   - If you don't have a scanner, manually enter the **Item Number** and press **Enter** to simulate a scan.
4. The next page will display the **quantity of that item currently at the On Dock location**.
5. Choose how many units you want to move:
   - **ALL** — move the entire quantity.
   - **Enter Qty** — move only a specific quantity. If selected, enter the **quantity** you wish to move and click **Next**.
   - **Go Back** — return to the previous screen.
6. After selecting the quantity, you'll be prompted to **scan** each item being moved, then click **Next**.
7. Enter the **new bin location** where the item will be placed.
8. Choose one of the following options:
   - **Finish** — complete the move.
   - **Finish and Scan Again** — complete the move and start another.
   - **Cancel** — abort the move.

Here's a screen-by-screen summary of the process:

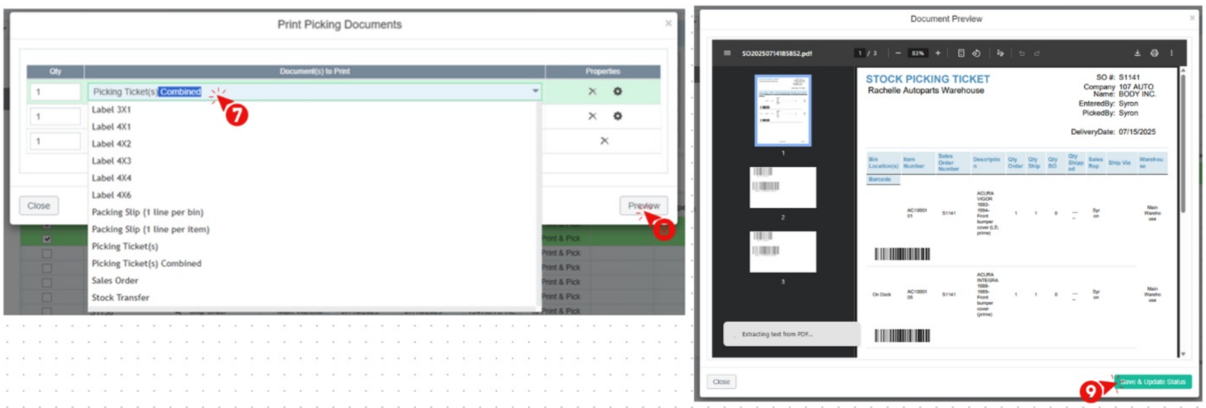
Here's how to assign items and print labels for a stock picker in 1place:

1. From the **Main Menu**, click **Warehouse**, then select **Shipping & Receiving**.
2. On the upper left panel (the area showing the order lifecycle), check that you have the correct **Warehouse** selected.
3. Under the **Items to Ship** section, click **To Print & Pick.**
4. Select the **Picker's Name** from the list.
5. In the table displayed, select the **Items or Orders to be picked**.
   - Use the **filters** if needed to narrow down your search.
6. Once you've selected the items, click the green **Print & Pick Selected** button.

Here’s a breakdown of the screen with key actions highlighted:

1. You’ll be prompted to choose the **Picking Documents** you want to print.
    - Confirm the **document types** based on your workflow - Label, Packing Slip, Picking Ticket, Sales Order, Stock Transfer
    - Enter the **Quantity** of documents to print.
2. Click **Preview** to see the documents before printing.
3. After reviewing, click **Save & Update Status** to finalize the assignment of items to the selected picker.

Here’s a breakdown of the screen with key actions highlighted:

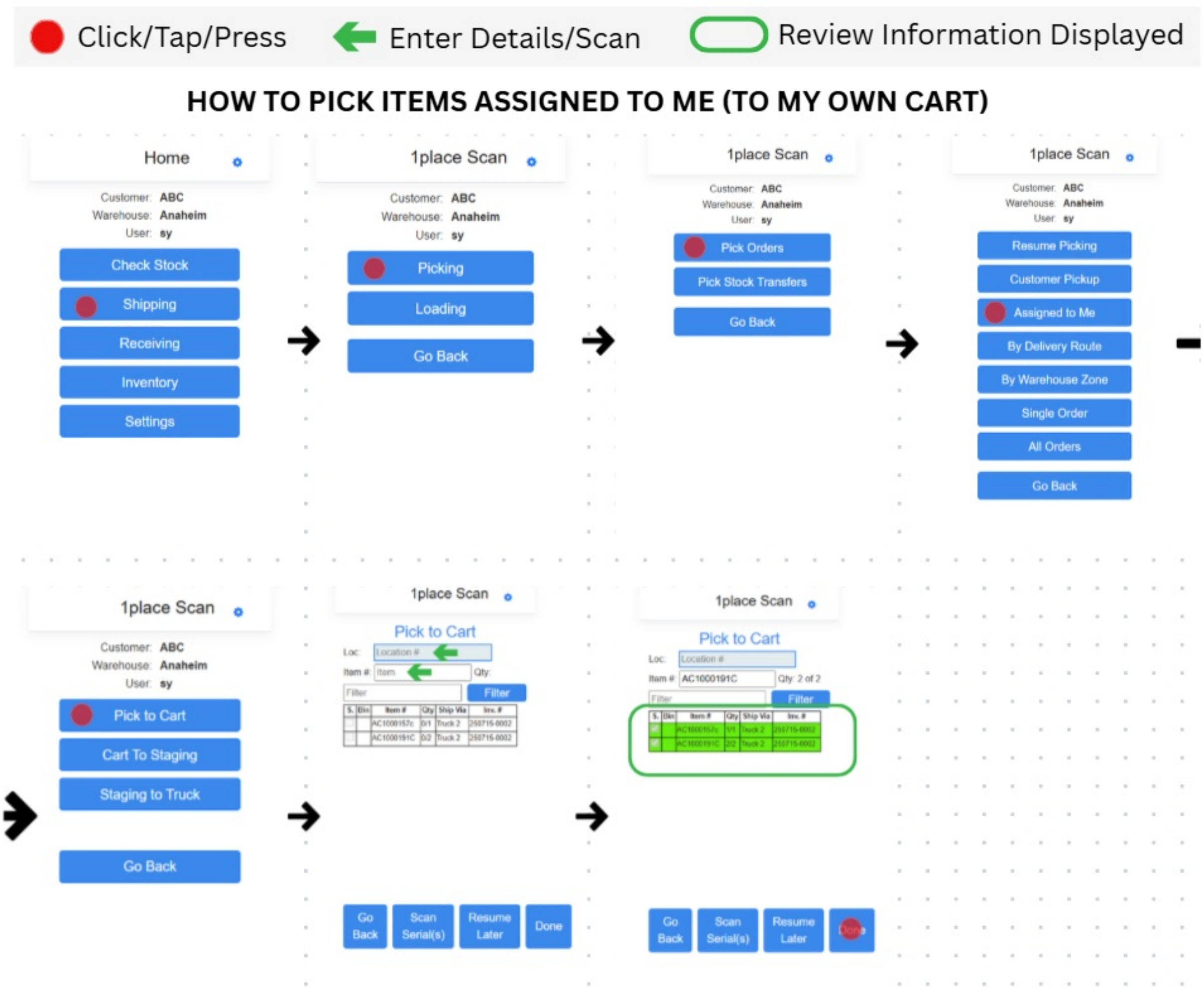
1. 

Here’s how to pick items assigned to you (to your own cart):

1. Click **Shipping**, then **Picking**, then **Pick Orders**.
2. Click **Assigned to Me** to view orders assigned to you.
3. Click **Pick to Cart**.
4. Enter or scan the **Location** where you are picking from.
5. Start scanning each **item**:
    - If you have a physical scanner, **scan each item.**
    - If not, manually enter the **Item Number** and press **Enter** to simulate a scan.
6. Once all assigned items have been scanned, click **Done**.

Here’s a screen-by-screen summary of the process:

1.



How items are assigned to you:

this kba will let the user know that this process is IDENTICAL to picking items for normal Sales Orders, since stock picked for Sales Orders and Sale Order Transfer are all included on the exact same picking list).

Here's how you can pick items assigned to you (to your own cart):

1. Click **Shipping**, then **Picking**, then **Pick Orders**.
2. Click **Assigned to Me** to view orders assigned to you.
3. Click **Cart to Staging**.
4. Enter or scan the **Location** where you are transferring the item to.
5. Start scanning each **item**:
    - If you have a physical scanner, **scan each item.**

- If not, manually enter the **Item Number** and press **Enter** to simulate a scan.

6. Once all assigned items have been scanned, click **Done**.

Here's a screen-by-screen summary of the process:

Here's how to receive order transfers to the dock in 1place:

1. From the **Home Screen**, click **Receiving** and select **Receive Order Transfer**.
2. You'll see two options:
   - **Receive All to Dock** — this will automatically display all items in the transfer. Review them and click Receive Now if everything looks correct.
   - **Receive Items to Dock** — this requires you to scan each item individually.
3. If scanning each item:
   - Use a physical scanner to scan each item, or
   - Manually enter the **Item Number** and press **Enter** to simulate a scan.
4. As you scan, each item will appear in a table showing:
   - **Location** where the item will be placed
   - **Item Number**
   - **Quantity**
   - A Delete (**X**) button to remove any mistakes
5. After scanning all the items, click **Done** to complete the process.

Here's how to load items from staging bins to the truck in 1place:

1. From the **Home Screen**, click **Shipping** and select **Loading**.
2. Click **Load Order Deliveries**.
3. Select the **Driver** assigned to the delivery.
4. Pick the **Schedule**, then click **Next.**
5. Choose how you want to select the orders:
   - **Scan Tickets** — scan each Order Number (ticket). Once you're done scanning tickets, click Use Scanned

Order.

   - **Select by Route** — choose orders by selecting the route.

6. Start scanning each item for the selected orders.
7. Once all items are scanned, click **Finish** to complete the loading process.

Here's how to check inventory quantities and bin locations in 1place:

1. From the **Home Screen**, click **Check Stock.**
2. Enter the **Item Number** or scan the item.
3. The following details will be displayed:
   - **Default Bin**
   - **Description**
   - **Part Number (Part #)**
   - **Total Quantity**
4. Below that, you'll see a table showing:
   - **Bin Location**
   - **Quantity in each bin**

Here's how to count items by bin in 1place:

1. From the **Home Screen**, click **Inventory**, then select **Inventory Count**.
2. Choose **Count by Bin**.
3. Enter or scan the **Bin Location** you want to count.
4. Scan each **item** in that bin.
5. Once done, click **Review and Finish**.
6. Review the scan results.
   - Any **discrepancies** between your count and the system inventory will be shown.
7. Click **Done** to update the inventory.

Here's how to count items by item number in 1place:

1. From the **Home Screen**, click **Inventory**, then select **Inventory Count**.

2. Choose **Count by Item.**
3. Enter or scan the **Item Number**.
4. Enter or scan the **Location**, then scan each item in that location.
5. **Repeat** this step for each location where the item is stocked.
6. Review the scanned items.
7. Click **Done** to complete the count.
8. You'll see a **confirmation message**: "Successfully Updated Inventory."
    - Any discrepancies between your count and the system inventory will also be displayed.

Here's how to view all items currently on the dock in 1place:

1. From the **Home Screen**, click **Inventory**, then select **View Dock Items.**
2. All items currently on the dock will be displayed.
3. Use the **Filter** to search for a specific item if needed.
4. Click **Done** when finished.

Here's how to request a credit for a customer (for the **FULL AMOUNT** of the item):

1. From the **Home Screen**, click **Receiving** and select **Return Items.**
2. Click **Request Credit.**
3. Enter the **Invoice Number** of the item being returned, then press **Enter or click Next**.
4. **Scan the item(s)** being returned.
5. In the table that appears, select the **Reason for Return** from the dropdown under the Reason column.
6. Once all items are scanned and reasons selected, click **Request Authorization**.
7. Click **Done** when finished.
8. If you have the proper access, you may click **Proceed** to approve the credit request directly.
    - Note: Approval access is typically restricted to admin users.
    - Returned items are also subject to inspection before credit approval.
    - Once approved, the credit will be issued to the customer.

Here's how to request a credit for a customer (**CUSTOM AMOUNT**):

1. From the **Home Screen**, click **Receiving** and select **Return Items**.
2. Click **Request Credit**.
3. Enter the **Invoice Number** of the item being returned, then press **Enter or click Next.**
4. **Scan the item(s)** being returned.
5. In the table that appears, select the **Reason for Return** from the dropdown under the Reason column.
6. Select **Custom Amount.**
7. Verify the **dollar amount** you are requesting and provide a **reason** for the custom amount.
8. Click **Request Authorization** to submit the request.
9. If you have the proper access, you may click **Proceed** to approve the credit request directly.
    - Note: Approval access is typically restricted to admin users.
    - Returned items are also subject to inspection before credit approval.
    - Once approved, the credit will be issued to the customer.

Here's how to authorize a customer credit in 1place:

1. From the **Home Screen**, click **Receiving** and select **Return Items**.
2. Click **Credit Authorization.**
3. You will see a list of credit authorization requests in a table showing:
    - **Customer Name**
    - **Invoice Number**
    - **Item Number**
    - **Amount**
    - **Reason**
    - **Status of the request**
4. Click **Proceed** on the request you want to review and approve.
5. After carefully reviewing, click **Approve or Decline** as needed.
6. Click **Done** when finished.

Here's how to inspect item returns using the scanner:

1. From the **Home Screen**, click **Receiving**, then select **Return Items.**
2. Click **Inspect Returns.**
3. Enter or scan the **Item Number** of the item being inspected.
4. After scanning, the system will display matching invoices.
5. Click **Select** on the item you want to inspect.
6. The following details will be displayed:
    - **Item #**
    - **CM # (Credit Memo)**
    - **Customer Name**
    - **Ship Via**
    - **Reason for return**
7. The inspector will confirm whether the item is **Good for Stock or Not**:
    - If Good for Stock, the item will be returned to inventory.
    - If Not, it will not be restocked.
8. Click **Done** when finished.

Here's how to put away returned items in 1place:

1. From the **Home Screen**, click **Receiving**, then select **Return Items.**
2. Click **Put Away Returns.**
3. Set the **Start Date and End Date** for the returned items you want to put away, then click **Scan Now.**
4. Enter or scan the **Item Number.**
5. Enter or scan the **Bin Location** where the item will be stored.
6. The scanned item will be **highlighted** in the system.
7. Once all items are scanned and put away, click **Done.**

Here's how to move inventory items in 1place:

1. From the **Home Screen**, click **Inventory**, then select **Bin Transfer.**
2. Enter or scan the **Location** where the item is currently stored.

3. Enter or scan the **Item Number**, then click **Next.**
4. Confirm the **Quantity** you want to move:
    - Click **All** to move the full quantity.
    - Click **Enter Qty** to move a specific number of items.
5. **Scan each item** to be moved using a physical scanner.
    - If you don't have a scanner, manually enter the Item Number and press Enter to simulate a scan.
6. Enter or scan the **New Bin Location** where the item will be placed.
7. Click **Finish** when done — or **Finish and Scan Again** if you want to move another set of items.

1place Scan Settings

Overview

The **Settings** menu in **1place Scan** allows administrators to configure users, company-wide scanning preferences, and warehouse locations used throughout the application.

Settings can be used to:

- Manage user accounts and permissions
- Configure company-wide scanner behavior
- Maintain warehouse bins and zones
- Control access to individual warehouse functions

To access the Settings menu, tap the **gear icon** located in the upper-right corner of the **Home** screen.

How to Open the Settings Menu

Step 1. Open the Home Screen

Log in to **1place Scan**. After logging in, the Home screen displays the available warehouse functions.

Step 2. Open Settings

Tap the **gear icon** in the upper-right corner of the Home screen.

The **Settings** menu will open.

Available Settings

The Settings menu provides access to the following options:

Menu	Description
User Settings	Manage users, permissions, and user-specific scanning settings.
Company Settings	Configure company-wide settings that affect how 1place Scan operates.
Manage Bins & Zones	Create and maintain warehouse bins and warehouse zones used throughout 1place Scan.
Go Back	Returns to the Home screen.

Notes

- Some settings are only available to users with administrator permissions.
- Changes made in **Company Settings** affect all users.
- Changes made in **User Settings** only affect the selected user.
- **Manage Bins & Zones** is used to maintain warehouse locations referenced throughout receiving, picking, inventory, and delivery operations.

How to Manage Users in 1place Scan

The **User Settings** screen allows administrators to create, edit, and remove users who can access **1place Scan**. It also controls each user's permissions, default warehouse, and scanning behavior.

To access this screen:

> **Settings → User Settings**

User Settings Overview

From the User Settings screen, administrators can:

- View existing users
- Create new users
- Edit user information
- Configure warehouse access
- Configure scanner behavior
- Assign permissions to individual warehouse functions
- Remove users from 1place Scan

How to Edit a User

Use this option to modify an existing user's information, warehouse access, or permissions.

Step 1. Open User Settings

Navigate to:

Settings → User Settings

Step 2. Select a User

Choose the user you want to edit from the **Edit User** dropdown list.

Step 3. TapEdit User

The Edit User screen will open.

User Information

Configure the user's basic account information.

Field	Description
User Name	Username used to log in to 1place Scan.
Password	Password used during login.
Email	User's email address.
Admin	Grants administrator privileges within 1place Scan.

Warehouse Settings

Configure the warehouses available to the user.

Setting	Description
Default Warehouse	Warehouse automatically selected when the us
Additional Warehouses to Select From for Item Inspection Returns	Allows the user to select additional warehouse:
OneSource User	Associates the 1place Scan user with a user acc

Scanner Behavior

These settings control how the scanner behaves during warehouse operations.

Setting	Description
Block Entry of Items Not on PO	Prevents users from receiving items that are not included on the selected Purchase
Enable Cannot Find in Bin	Enables the **Cannot Find in Bin** option during warehouse picking.
Cannot Find Action	Determines what action the system performs when an item cannot be found in its a:
Duplicate User Access From	Copies another user's settings and permissions to simplify new user setup.

Access Permissions

Administrators can control which features each user can access.

Permissions are organized by module.

Check Stock

- Check Stock by Bin
- Check Stock by Item

Shipping

Configure access to warehouse shipping functions, including:

- Picking
  - Resume Picking
  - Customer Pickup
  - Assigned to Me
  - By Delivery Route
  - By Warehouse Zone
  - Single Order

    - All Orders
- Pick Stock Transfers
    - Stock Transfers
    - Assigned to Me
    - Stock Transfer By Area
- Loading
    - Load Order Deliveries
    - Quick Load (No Scan)
    - Scan Each Item
    - Load Stock Transfers

Receiving

Configure access to receiving functions, including:

- Receive PO
    - Resume Scanning PO
    - Receive PO to Dock
    - Scan PO Items to Dock
    - Move Dock Items to Bins
- Receive Order Transfers
    - Receive Transfer to Bin
    - Quick Receive Transfers
- Receive Stock Transfers
- Return Items
    - Request Credit
    - Credit Authorization
    - Inspect Returns
    - Put Away Returns

Inventory

Configure access to inventory functions, including:

- Check Stock
    - Check Stock by Bin
    - Check Stock by Item
- View Dock Items
- Move Dock Items to Bins
- Count Inventory
    - Count by Bin
    - Count by Item
    - Inventory Assignment
- Bin Transfer
    - Transfer Item
    - Transfer All in Bin

Delivery

- Proof of Delivery

Settings

- User Settings
- Company Settings
- Manage Bins & Zones

Step 4. Save Your Changes

After making the necessary updates, tap **Save** to apply your changes.

How to Add a New User

Use this option to create a new user who can access 1place Scan.

Step 1. Open User Settings

Navigate to:

Settings → User Settings

Step 2. TapAdd New User

A blank user setup screen will open.

Step 3. Complete the User Information

Enter the required information for the new user.

This includes:

- User Name
- Password
- Email address
- Administrator access (if applicable)
- Default Warehouse
- Additional Warehouse access
- Scanner behavior settings
- Access permissions

Configure permissions according to the user's warehouse responsibilities.

Step 4. Save the User

Tap **Save** to create the user.

If you do not wish to continue, tap **Cancel** to return without saving.

How to Remove a User

Use this option to remove a user's access to 1place Scan.

Step 1. Open User Settings

Navigate to:

Settings → User Settings

Step 2. Select the User

Choose the user from the **Edit User** dropdown list.

Step 3. TapRemove User

Confirm the action if prompted.

The selected user will no longer be able to log in to 1place Scan.

Tips

- Grant users only the permissions required for their role.
- Use **Duplicate User Access From** when creating users with similar responsibilities to save setup time.
- Periodically review user permissions to ensure they remain appropriate.
- Limit **Admin** access to trusted users responsible for managing 1place Scan settings.

------>>(REWRITING THE WHOLE ARTICLE HERE but keeping the old one since I'm still building it)

1place Scan - User Guide & How To's

Overview

1place Scan is the web-based warehouse scanning interface for **1place**, designed to help warehouse personnel perform daily warehouse operations quickly and accurately using barcode scanning or manual data entry.

Because it is part of the 1place system, **no separate software installation is required**. Users simply access **1place Scan** through a supported web browser on a mobile device, tablet, or desktop computer.

The application communicates with 1place in real time, allowing inventory movements to be recorded immediately as items are received, stored, picked, counted, staged, loaded, and delivered.

Using barcode scanning helps reduce manual data entry, improve inventory accuracy, and streamline warehouse operations throughout the warehouse.

How to Log In to 1place Scan

Overview

Before performing any warehouse operations, users must log in to **1place Scan** using their assigned 1place credentials.

The login screen provides secure access to the warehouse functions available to the user. Once authenticated, the system loads the customer's warehouse environment and applies the user's security permissions.

How to Log In

1. Open **1place Scan** using the web address: https://scan.1place.cloud/

2. Enter your **Username**.

3. Enter your **Password**.

4. Tap or click **Login**.

If your credentials are valid, the system will open the **Home** screen.

Login Screen

The login screen contains the following controls:

Field	**Description**
Username	Enter your assigned 1place username.
Password	Enter your 1place account password.
Login	Authenticates your credentials and opens the Home screen.

Tips

- Use the same username and password assigned to your 1place account.
- If you cannot log in, verify that your username and password have been entered correctly.
- Contact your system administrator if you believe your account is disabled or you do not have access to 1place Scan.

Getting Started

After logging in, the **Home** screen serves as the starting point for all warehouse operations.

The Home screen displays the following information:

- **Current Version** – The installed version of 1place Scan.
- **Customer** – The company currently logged in.
- **Warehouse** – The active warehouse.
- **User** – The currently signed-in user.

The Home screen also provides access to the primary warehouse functions:

- **Check Stock**
- **Shipping**
- **Receiving**
- **Inventory**
- **Delivery**
- **Settings**

Each menu contains workflows designed for specific warehouse tasks.

Check Stock

Overview

The **Check Stock** menu allows warehouse users to quickly view inventory information without making any inventory changes.

There are two lookup methods available:

- **Check Stock by Bin** – Displays all inventory currently stored within a specific warehouse bin.
- **Check Stock by Item –** Displays every warehouse location where a specific inventory item is stored.

How to Check Stock by Bin

The **Check Stock by Bin** feature allows users to view all inventory currently stored in a specific warehouse bin. This is useful for verifying inventory locations, checking quantities on hand, and identifying the Purchase Order (PO) associated with received inventory.

Users can locate a bin by scanning its barcode or by manually entering the bin number.

How to Access Check Stock by Bin

1. From the **Home** screen, tap **Check Stock**.

2. Tap **Check Stock by Bin**.

The **Check Stock by Bin** screen will appear.

Step 1. Scan or Enter the Bin Number

Scan the barcode attached to the warehouse bin or manually enter the **Bin #**.

Tap **Next** to continue.

Step 2. Review the Bin Contents

The system displays all inventory currently stored in the selected bin.

The following information is available for each item:

Column	Description
Item	The item number stored in the selected bin.
Qty	The quantity currently available in the bin.
PO#	The Purchase Order associated with the inventory, when available.

The **Total** displayed below the list represents the total quantity of all inventory currently stored in the selected bin.

Filter the Results

If the selected bin contains multiple inventory items, you can narrow the results using the **Filter Item** field.

1. Enter all or part of an **Item Number**.

2. Tap **Filter**.

Only matching items will be displayed.

Show or Hide Purchase Order Numbers

The **Show PO** checkbox controls whether the **PO#** column is displayed.

- **Checked –** Displays the Purchase Order number associated with each inventory record.

- **Unchecked** – Hides Purchase Order numbers for a simplified inventory view.

Refresh the Bin Information

Tap **Refresh** to retrieve the latest inventory information for the selected bin.

Exit the Screen

Tap **Done** to return to the previous menu.

How to Check Stock by Item

The **Check Stock by Item** feature allows users to view every warehouse location where a specific inventory item is stored. This is useful for locating inventory, verifying quantities across multiple bins, and viewing the Purchase Order associated with each inventory record.

Users can locate an item by scanning its barcode or by manually entering theitem number.

How to Access Check Stock by Item

1. From the **Home** screen, tap **Check Stock**.
2. Tap **Check Stock by Item**.

The **Check Stock by Item** screen will appear.

Step 1. Scan or Enter theItem Number

Scan the item's barcode or manually enter the **Item #**.

Tap **Next** to continue.

Step 2. Review the Inventory Locations

The system displays all warehouse locations where the selected item is currently stored.

The following information is available for each inventory record:

Column	Description
Bin	The warehouse bin or storage location where the item is stored.
Qty	The quantity currently available in that location.
PO#	The Purchase Order associated with the inventory, when available.

The **Total** displayed below the list represents the total quantity of the selected item across all warehouse locations.

Filter the Results

If the item is stored in multiple locations, you can quickly locate a specific bin using the **Filter Bins** field.

1. Enter all or part of the **Bin** name or number.
2. Tap **Filter**.

Only matching bin locations will be displayed.

Show or Hide Purchase Order Numbers

The **Show PO** checkbox controls whether the **PO#** column is displayed.

- **Checked** – Displays the Purchase Order number associated with each inventory record.
- **Unchecked** – Hides Purchase Order numbers for a simplified inventory view.

Refresh the Inventory Information

Tap **Refresh** to retrieve the latest inventory information for the selected item.

Exit the Screen

Tap **Done** to return to the previous menu.

Check Stock Tips

- Use barcode scanning whenever possible to reduce manual entry errors and speed up warehouse operations.
- Tap **Refresh** whenever inventory may have changed while the screen is open.
- Use the **Filter** fields to quickly locate a specific item or bin when working with large inventories.
- Enable **Show PO** whenever you need to identify which Purchase Order inventory originated from.
- Temporary locations such as **On Dock** and **Returns Area** indicate inventory that is currently being processed and has not yet been placed into its final warehouse location or is awaiting further action.
- Use **Check Stock by Bin** when you know the storage location and want to see everything inside it.
- Use **Check Stock by Item** when you know the item number and want to locate every bin where that item is stored.