Items - Item Detail screen - How To's

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Help Topics

- Sales Last 30 Days Field
- How to add Sales Velocity (Mover) as a Column in the Item List Screen
- How to view the Items Sales Velocity (Movers) Report

The **Item Details** screen is a comprehensive screen that displays every significant information about an Item in your inventory all on one screen. It is divided into three (3) main sections to organize data and functions:

Main Fields (section)
Description
Bin Location
Quantity on Back Order - quantity of the item ordered (from Vendor) for specific Customer(s) that are not yet received.
Quantity on Order. This is the quantity of the item ordered (from Vendor) that are not yet received.
Item Number
Quantity in Stock. This is the Quantity you have on your shelf, in all bins and warehouses.
To Sync (QBO) - (checkbox) gets checked automatically each time a new Item record is created in 1place then syncs with QuickBooks Online (QBO) when the record is saved.
Resync Flag - (checkbox) gets checked when an Item record is changed in 1place then syncs with QBO.
Last Synced - Date & time last synced with QuickBooks Online
Tabs (section) - *see below.*
Footer (section)
New Item (button) - To create a new Item record.
Delete Item (button) - To delete that Item.
Save (button) - To save the actions/changes made on that screen.
Help (button) - Leads you to self-help articles about the **Item Details** screen.
Close (button) - To close that screen.

Shortcut Key: **Ctrl + F10**, or
On the **Quick Start Menu**, 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 **Item List** screen, click the **Edit** button and click on any particular item record that you prefer to edit (Note: Any changes made will be automatically saved), or
On the **Item Details** screen, make the necessary changes then click **Save** (lower right part of the screen).

Using **Shortcut Key**: **F10,** or
On the **Quick Start Menu**, click the **Search** (**magnifying glass**) icon then select **Items**, or
On the **Quick Start Menu**, click **Find Parts**, fill in the required information on the textboxes to filter then click Search, or
(If already 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, 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.

Shortcut Key: **Shift+F10**, or
On the **Quick Start Menu**, click the **List** button and select **Items**, or
On the **Main Menu Bar**, click **Items.**

On the **Item List** screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, or
Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion, or
On the **Item Details** screen, click **Delete Item** button (lower left part of the screen).
Note: To preserve the integrity of the database, you cannot delete any Item record that has been used on any of the screens such as Purchase Order, Sales Order, Invoice etc. You can however uncheck the **Active Checkbox** - which will hide the item from most Inventory Item drop down lists.

On the **Main Menu Bar**, click on **Reports > Items.**
Define your Report.
    1place allows you to generate different types of Inventory or Item Reports according to your needs. Pick from the type of Item Report (i.e. Items, Items - Date Added, Items Stock, Items Vendors, Total Sales By Item - in various Orders) from the **Reports section.**
    - Note: You can adjust the period covered by your report. On the **Report Period** filter section, select from the **drop down** filter lists or manually input the dates 'from' and 'to'.

Click on **Run Report**.
    Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    Note2: At this point, you may choose to **Print**, **Email** or **Download** your Report copy.

After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.
On the **Customize Report popup** screen:
    (Optional) Select the **Min Access Level** from the **drop down** icon.
    (Required) Type in the **Report Name** (whatever you want to call your Report).
    (Optional) Type in any **Report Description**.
    (Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    Click on **Save.**
    Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** if you checked the **Favorite** box.
    Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
    Note3: Click on the **X** button to permanently delete any Custom Report from the list.

Note: You have the option to **Email**, **Print** or **Download** a Report copy (see instructions below).

On the **Item List** screen:

Select the record(s) by checking the box(es) .

Click the

button to Print and

to download (in Excel form).

There is also an option to Share

record(s) and this feature will be available in the future.

For Item Reports, go to **Main Menu** Bar > **Reports** > **Items,** create your Report (*see previous instructions) then click on the

button (upper right).

The **Print Preview** popup screen will appear. (Note: You cannot preview on the screen if you selected more than 5000 records.)

<u>DOWNLOAD COPY</u>: Click on

button (upper right) to <u>download</u> the Report. Save in your PC.

<u>EMAIL COPY</u>: Click on

button (lower right) to send a copy of the Report through <u>email</u>. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on

button (lower right).

<u>PRINT COPY</u>: Click on

button (upper right) to <u>print</u> the Report. Adjust Print Settings then click on

button (lower right).

You can enable (or disable) various *tabs* of information on the **Item Details** screen by clicking the Gear button (located on the same row of the tabs) and checking to select tabs. The following is a list of the tabs that can be used to enter or view additional information related to the Item record that you are on:

<u>Stock Details (section)</u>

This shows a grid of these types of fields:

- Qty in Stock
- Qty on PO's
- Qty Reserved on BO's
- Net Available
- Qty Needed in Next 30 Days
- Last Updated

<u>Sales Qtys (section)</u>

- # Units Sold Last 365
- # Units Sold 1 Year Ago

- # Units Sold 2 Years Ago
- Total # Sales Last 3 Yrs
- Trending

Sales $ (section)

- $ Sales Last 365
- $ Sales 1 Year Ago
- $ Sales 2 Years Ago
- Total Sales Last 3 Yrs
- Trending

Profit Details (section)

- Average Sales Price Last 365
- Average Cost Last 365
- Average Gross Profit $
- Average Gross Profit %

This tab sets and displays the following sections and fields describing the particular item in full details:

Note: You may choose to show/hide the fields under this tab. Click on the **Gear icon**

then check/uncheck the box(es).

Categories & Part Numbers (section)	Description
Type	
Search Category	What category is this Item in (Cooling)?
Search Sub Category	What sub Category is this Item in (More descriptive like Radiator)?
Years Range	What range of years does this Part Fit (90, 98)?
Years Listing	
Make	The brand of the car.
Model	What Model does this part fit (Titan)?
Quantity Indicator	Does this part have a quality certification like (Capa or Diamond Standard)?
Manufacturer	What is the 2 letter vehicle Manufacturer abbreviation for this part (FORD = FD, Nissan = NI)?
OEM #	What is the Original Equipment Manufacturers number for this part?
Other #	
UPC Code	The Universal Product Code of the item used in tracking Point of Sale items.
QPC Sort Order	
PartsLink #	What is the PartsLink Number that was assigned to this part?
PType	

Purchase Order Details (section)	Description
Last PO Qty	Quantity of that Item from the most recent purchase.
Last PO Date	Date of the most recent purchase.
Next Expected PO Delivery Date	Expected date of arrival of the next (earliest) item order.
Reorder Point(Min)	Your minimum level at which an Item stock needs to be replenished.
Stock Level(Max)	Your set upper limit of stock for a particular Item.
PType	

Item Picture (section)	Description
Item Image	

Shipping Details (section)	Description
Shipping Weight	Your vendor/supplier can provide you with the shipping weight.
Weight Unit	Your vendor/supplier can provide you with the weight per unit.
Freight Class	Shipping Companies need to know what they are shipping and all Items have a shipping class. Your supplier can provide you with the shipping class.
Volume	Your vendor/supplier can provide you with the SQ. Feet / Volume
Ecom Ship Length	How long is this item?
Ecom Ship Width	How wide is this item?
Ecom Ship Height	How high is this item?
Ecom Ship Type	How will this item be shipped to the customer?

Other Details (section)	Description
Active	Is this item marked as active. Only Active Items will appear in purchase orders and on the QPC
Taxable	Is this Item Taxable
Special Order	Do you need to special order this Item for each sale (Not an item that you carry in stock).
Lot Tracking	
Serialized	
Assembly	
eCommerce	Check this box if you want this item to appear on your integrated Website.
Commissionable	Check this box if opting to track Commissions for this item.

Special Notes (section)	Description
Special Notes (displayed on QPC)	Type any notes that you want to be displayed on the QPC screen.

This tab indicates the following information about the particular item:

- **Last Inventory Date**: Date when this particular Item was last physically verified (inventoried, moved, relocated or tagged).
- **Item Added Date**: Date when the Item was added to your inventory.
- **Item Last Edited**: Date when any of the Item's information on the Main field section was last edited.
- **Bin**: This is an *alpha-numeric* field used by the Stock Picking Tickets to arrange the order that items are to be picked off the shelf by Picking Order, then Location, then Bin.

This tab also displays all other relevant information (below) about the particular item in tabular form (Note: there is an option to show/hide the column fields by clicking the G**ear icon**

on the right, just above the table).

- **Receipt ID** - a system generated code for receipt of the Item.
- **Qty Received** (Quantity Received)
- **Cost**
- **Vendor Name**
- **Bin**
- **Warehouse Code**
- **Stk Transfer** (Stock Transfer)
- **Date Received**
- **Qty in Stock**
- **Additional Cost**
- **Purchase Order Number**
- **Lot / Serial #**
- **Spec Order** (Special Order)
- **Notes** - system notes who made the adjustment, the # of item/s and the exact date and time the update was made

This tab keeps a record of all the Vendors from whom the particular Item is usually purchased (or can be outsourced).

The tab indicates the following information about the particular Item with relation to the vendor:

- **PO Category**: What category is this Item in? (e.g.Cooling)
- **PO Item Description**: The description used for PO's if different from the description used on **Quotes, Orders, Invoices, and Purchase Orders**
- **Last Order Date:** When did you place the last order for this item?
- **Special Notes**: Any notes that you will need to remember for ordering this part e.g. "Item can only be ordered in case Qty of 12"

This tab also displays the following fields all about the latest historical transaction with the default vendor for that particular item:

- **Vendor Name**: Who is the main vendor/supplier for this part?
- **Vendor Item #**: What is the Item Number provided by the Vendor/Supplier?
- **Vendor Cost**: This is the cost of the part from the vendor/supplier that you have listed as your default supplier.
- **Lead Time (# Days)**
- **Case Pack**: How many items per case?
- **CSF/Volume**: Your supplier can provide you with the SQ. Feet / Volume
- **Qty On Order** (Quantity On Order)
- **Rnd Case Qty**: When creating an Auto PO, do you want to automatically round your order UP to the

next full case amount?
- **Conv Case Qty**
- **Last Order Date**: When did you place the last order for this item?
- **Cost Last Updated:**
- **Ven QIS** (Vendor Quantity In Stock)

Pricing (section)
- **List Price** - The item's suggested retail price.
- **OEM Price** - Original Equipment Manufacturer Price
- **Fixed Cost (for Markup Pricing)**
- **Average Cost (for Markup Pricing)**
- **Last Additional Cost**
- **Service Cost**
- **Pricing Category**
- **PO Category**

Core Charge Item (section)
- **Price Unit**
- **Last Price Change**
- **Core Charge Item #**
- **Core Charge**

QuickBooks Online GL Accounts (section)
- **Sales / Income GL Account**
- **COGS / Expense GL Account**
- **Inventory GL Account**

This a tabular data where you can easily view the **Status** (whether "Open POs" or "Received POs") of ALL related Purchase Orders of the particular Item.
Also include other important details such as the **PO Number, PO Date, Exp. Date, Days, Qty Order** (Quantity Order), **Qty Recd** (Quantity Received), **Date Recd** (Date Received), **Supplier** or Vendor, **Cost, Ordered By, Color, Style, Warehouse.**
Note: Clicking anywhere within the row of a PO on this list will open the **Purchase Order** screen of that particular PO Number.

This tab contains three (3) clickable tabular data related to the particular item, as follows:

Invoices/Credit Memo button - Click on this button to view all Invoices and Credit Memos related to the particular Item.
- Also include other important details such as the **Ship To Customer**, **Invoice Date**, **Type**, **Qty Sold**, **Ship Qty**, **Price**, **Discount**, **Net Price**, **Cost**, **Warehouse**.
- Note: Clicking anywhere within the row of an **Invoice/Credit Memo** on this list will open the **Invoice** or **Credit Memo screen** of that particular Invoice/CM record.

Sales Orders button - Click on this button to view all Sales Orders related to the particular Item.
- Also include other important details such as the **Ship To Customer**, **Sales Date**, **Qty Sold**, **Ship Qty**, **Price**, **Discount**, **Net Price**, **Cost**, **Warehouse**.
- Clicking anywhere within the row of a Sales Order on this list will open the **Sales Order** screen of that particular SO record.

Quotations button - Click on this button to view all Quotes related to the particular Item.
- Also include other important details such as the **Ship To Customer**, **Quotation Date**, **Qty Sold**, **Price**, **Discount**, **Net Price**, **Cost**, **Warehouse**.

Note: Clicking anywhere within the row of a Quotation on this list will open the **Quotation** screen of that particular Quotation Number.

This is still under construction.

The Catalog is used on the Quick Price Check (Auto) to help users search and find parts by the vehicle or item Year, Make and Model. You can enter unlimited data under columns Year, Make and Model for a particular item.

Manage Catalog button

The **Add New Row** button - This button is used if you want to add Catalog search records for an Item. You can enter 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.

- To add Catalog search record:
  - Click on the **Catalog** tab (on the **Item Detail** screen of that particular part) then click on **Add New Row** button.
  - Enter: **Year Range, Make, Model, Category, Sub Category, Item Description and Years Listing.**
  - Click **Save.**

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This tabular data displays all transactions made related to a particular Item. It shows the:

- **Date & Time**
- **Action**
- **Source**
- **Form Name**
- **User Name**
- **Transaction**
- **Item Cost**
- **AVG. Cost** (Average Cost)
- **Flag**
- **On Receipt ID**
- **QTY Recvd** (Quantity Received)
- **Adjustment**
- **QTY in Receipt** (Quantity in Receipt)
- **Total in Stock**

- All changes made on the Item Detail screen are automatically recorded on this Audit Log. This tab shows the following details:
  - **Updated By** - Shows the name of the specific User who made the update.
  - **Date** - Shows the exact date and time when the update was made.
  - **Item Number**
  - **Change Type**

    - **Column Name** - The title of the text field where the update was made.
    - **Old Value** - The recorded value/information before the update.
    - **New Value** - The newly entered value/information.

- The **Picture tab** on the **Item Details** screen allows users to view and manage item images, descriptions, and related visual details. This tab shows the following details:
    - **Picture ID** - A unique system number assigned to each item image.
    - **Picture Thumbnail** - A small preview of the image.
    - **Picture File Name** - The name of the image file.
    - **Web URL Path** - The web link used to upload or store the image.
    - **Picture Description** - A short description or note about the image.
    - **Picture Size** - The file size of the image.
    - **Uploaded By User** - The user who uploaded the image.
    - **Uploaded Date/Time** - The date and time the image was uploaded.
    - **Upload Pictures Dropdown** - A menu with options to upload item images.
        - Add URLs to Pictures
        - Upload an Image
        - Upload Image from Folder
        - Import Pictures from Google Drive
    - **Batch Action Dropdown** - Delete images uploaded

Go to **Settings** > **Items** > **Item Settings**.

New Item Defaults

- **Item Type**: Select 'Inventory' if you want 1place to track your inventory by default.
- **Taxable**: Check this box (as the default) if the majority of your items are taxable (and just uncheck the box when adding an item that is not taxable).
- **Special Order**: Check this box if the majority of your items are ordered at the time theSales Order is created and not kept on hand. This option allows you to create purchase orders from the sales orders for the special order items.
- **Location / Bin Tracking**: Check this to enable tracking of your Items' location (and which Bin) in your warehouse.
- **Show on eCommerce**: Check if you want your Items (by default) to appear on your integrated Website.
- **Commissionable**: Check this if you want to track commissions for your Items.
- **Round up to Case Qty on PO Batch**: Check this if by default you want to automatically find your order UP to the next full case amount (when Creating an Auto PO).
- **Order and Receive as Case on PO**: If you receive as a case then the 24 items in the case will appear as 1 item on your inventory.
- **Add item to searchable Catalog**: Check this if you want all newly added items to be added to your searchable Catalog.
- **QuickBooks Income Account**: The default Income GL journal entry of your Items on QuickBooks online per sales transaction.
- **QuickBooks Expense Account**: The default Expense GL journal entry of your Items on QuickBooks online per sales transaction.
- **QuickBooks Asset Account**: The default Asset GL journal entry of your Items on QuickBooks online per purchase and receipt in your stock/inventory.

Item Preferences - Select if **Yes** or **No** according to your business operations.

- We stock inventory.
- We deliver the products we sell.

- We assemble (bundle) some of the items we sell.
- We assemble (bundle) some of the items we sell, but need to change the components on the fly.
- We sell some items that have a "LOT" #
- We sell some items that have a "SERIAL" #.
- We store (and sell) inventory in multiple warehouses.
- We bar-code (or would like to bar-code) our inventory to scan items in and out of stock.

Item Tabs - Checking the boxes of the fields will make them appear as '**tabs**' (by default) on the **Item Details** screen. *See 'Item Details Screen Tabs' for the explanation of each tab.

Item Pricing Levels - This section allows you to define an unlimited number of Item Price Levels.

- **Price Code** - can be any given name of your choice.
- **Discount %** - can be assigned as the **Default Pricing Method** for any 1 or more customers and can also be used in Customers' Custom Pricing settings (can be set when you go to **Customer Details** screen > **Custom Pricing** tab of the particular Customer); can also be assigned when making general Pricing Templates (go to Main Menu Bar '**Sales**' > **Pricing Templates**).
- Click on the **X** button under the **Action** column to delete a defined Price Code.

This function allows you to manually edit, add or delete Quantities in Stock.
To do this, go to **Item Detail** screen>**Stock** tab then click on **Adjust Quantities in Stock** button.
The **Adjust Inventory Stock Form** will be displayed. Fill in the required details as follows:

- Select by clicking the radio button whether to **Add to Inventory** or to **Remove from Inventory**.
- **Quantity**: This is the number of items to be added or deleted.
- **Warehouse**: Select the warehouse name when adding item/s.
- **Receipt ID**: Select the **Receipt ID** from the drop down list when deleting item/s.
  - Note: You might need to remove inventory from more than 1 Receipt if the number of items in that particular Receipt ID is less than the quantity to be deleted. In this case, you just need to make another adjustment entry.
- **Cost**:
  - When deleting item/s, the item cost cannot be edited and the system auto-fills the cost as recorded on the Receipt ID.
  - When adding item/s, the system auto-fills this with the Average weighted cost of the items in stock. This value can be adjusted/edited.
- **Date Received**: This will be displayed (auto-filled) when the **Add to Inventory** radio button is clicked.
- **Vendor**: Vendor name is optional.
- **Log Notes**: This automatically displays (when item Quantity is entered) who made the adjustment, the # of item/s and the exact date and time the update was made.
- **User Notes**: You may enter any notes about the adjustment.

NOTE: Any adjustment in Qty in Stock shall be reflected on the record table on **Item Details** screen>**Stocks** tab and on **Warehouse**>**Item Adjustments** screen.

This special function has been added to be able to instantly see a big picture of how much (of that particular Item) you currently have in your Warehouse(s) and how many units are coming in soon.

To view Item by warehouse, go to **Item Detail** screen>**Stock** then click **View Item By Warehouse** button (lower part of the screen) to see a popup table summary (or the **Item By Warehouse** popup screen) of the Item's status per warehouse. The table has the following fields:

- **Warehouse**
- **Qty in Stock (Quantity in Stock)**
- **Qty on Order (Quantity on Order)**
- **Qty Arriving** - Expected quantity (of that particular Item) to be received (based on the quantity on order).
- **#Days from Now** - The number of days until the arrival of the items.

This special function allows the transfer of item stock from one warehouse to another.
To do this, go to **Item Detail** screen (of the particular Item to be transferred) >**Stock** tab then click on **Transfer Inventory** button (lower part of the screen) to open the **Stock Transfers** screen.

- Click the **To Warehouse** drop down and select from the list the Warehouse where you want to transfer the Item.
- Note: The **User Name** and **Transfer ID** are auto-filled and auto-generated by the control system.
- Fill in the **Item Number** filter box (and the **Category/Sub Category**, optional) and click on the Search
  

  button.
- Note: The table just below it will show you where that particular Item is currently stored (Warehouse) as well as the quantity per Receipt ID (which is a system-generated ID for every batch of receipt of an Item and is the primary data point in tracking the movement of items in your Warehouse).
- Select from the rows or batches of items by clicking the box (first column). You may need to check more than one row if **Qty in Stock** is not enough.
- Type in the quantity to be transferred on the **Transfer** column.
- Click on the Transfer
  

  button (bottom right).

NOTE: Any Stock Transfer made shall be reflected on the record table on **Item Detail** screen>**Stocks** tab and on the **Transaction Log** (**Item Detail** screen > **Transaction Log** tab).

Go to **Settings** > **Warehouse** > **Warehouses**.
To add a Warehouse:

- Click on the
  

  button.
- On the **New Warehouse popup** screen, select the **Address Type** from the drop down list.
- Input the Warehouse Code, Warehouse Name, Attention (optional), Address Info.
- Click on **Yes** if Default Warehouse.
- Select a **QuickBooks Online Location** from the drop down list (to allow the P&L and other reports to display Sales & Expenses figures by Warehouse (Location).
- Click on **Save.**

To add another Warehouse (if having two or more Warehouses):

- Check the **Enable Multi-Warehouse Functionality** box.
- Follow instruction above to add the Warehouse(s).

To change Default Warehouse,:

- Click on the **pencil**
  
  icon of the Warehouse that you want to set as default.

- Click on **Yes** for Default Warehouse.
- Note: You can only set one Default Warehouse.

How to Merge an Item into Another Item

The **Merge Items** feature allows you to combine two duplicate or redundant inventory items into a single item record. During the merge process, the system transfers all related inventory, pricing, and transaction history from the source item to the selected destination item.

Once the merge is completed:

- All references to the original item are transferred to the selected destination item.
- The original item record is permanently deleted.
- The system automatically opens the destination item's record.

This feature is useful when duplicate items have been created or when multiple item records should be consolidated into a single inventory item.

> **Important:** Item merging is permanent and cannot be undone.

Step 1. Open the Item

Open the **Item Details** screen for the item you want to merge into another item.

Step 2. Open More Item Options

Click **More Item Options** located at the lower-left corner of the Item Details screen.

Step 3. Select Merge into Another Item

Click **Merge into Another Item**.

A dialog box will appear allowing you to select the destination item.

Step 4. Select the Destination Item

Search for or select the item you want to merge into.

Once selected, click **Merge Into Selected Item**.

Step 5. Confirm the Merge

A confirmation window will appear explaining the impact of the merge.

To continue, type **Merge** in the confirmation field and click **OK**.

During the merge process, 1place will:

- Re-link Inventory Levels
- Re-link Item Prices
- Re-link Item Inventory Log Details
- Re-link Quotes
- Re-link Sales Orders
- Re-link Invoices
- Re-link Credit Memos
- Re-link Purchase Orders
- Re-link all other records associated with the item

All of these records will now reference the destination item.

Step 6. Complete the Merge

After the merge is successfully completed, a confirmation message will appear.

> **Success**

Item merge and delete completed.

Click **OK** to continue.

The system will automatically:

- Delete the original item record.
- Open the destination item's Item Details screen.
- Display the merged item as the active record.

Result

After the merge:

- Only the destination item remains in the system.
- All inventory and transaction history previously associated with the original item now belong to the destination item.
- The original item is permanently removed from the database.

Tips

- Verify that you have selected the correct destination item before confirming the merge.
- Since the original item is permanently deleted, ensure it is no longer needed before proceeding.
- Merging items is recommended for consolidating duplicate inventory records while preserving historical transactions.

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**.

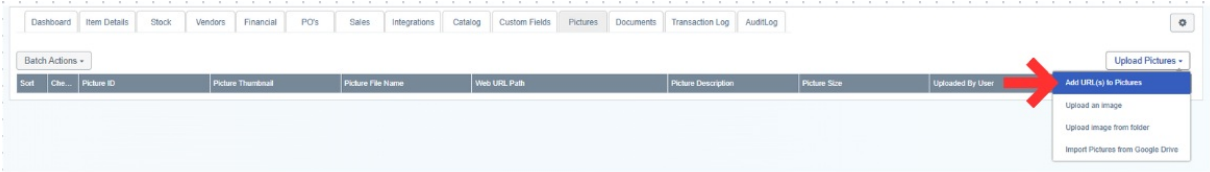
How do I bulk import item pictures using URLs with Excel?

Steps:

1. On the **Item Details** Screen, click on the **Pictures** tab.

2. Click the **Upload Pictures** dropdown.

3. Select A**dd URLs to Pictures.**



4. The **Add Item Picture URLs** window will appear.

5. Download the **Excel template** (recommended) to ensure proper formatting.

6. Open the template and enter the following details for each picture:

    - **Item**
    - **Pic Name**
    - **Pic Web URL**
    - **Description**

7. Save the completed Excel file.

8. Click **Choose Excel File** and upload the file.

9. To review the results, click **Download Results Excel.**

    - The results file will indicate whether each upload was successful or failed.

10. Click **Close** on the **Add Item Picture URLs** window.

11. Successfully uploaded pictures will appear in the pictures table.

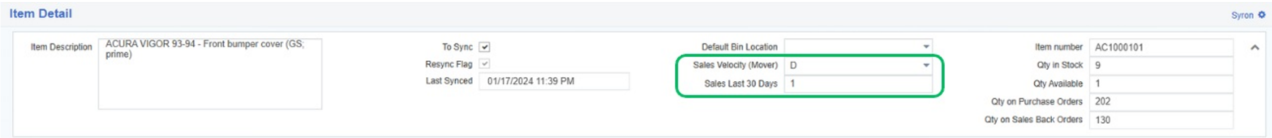
The **Sales Velocity (Mover)** feature helps you understand how quickly your items are selling by automatically assigning each item a **category** (such as A, B, C, or D).

These **categories** are based on **how many units an item has sold within a selected time frame (Month or Year).** This allows you to quickly identify fast-moving items and slow-moving inventory.

Where to Find It

Item Detail Screen

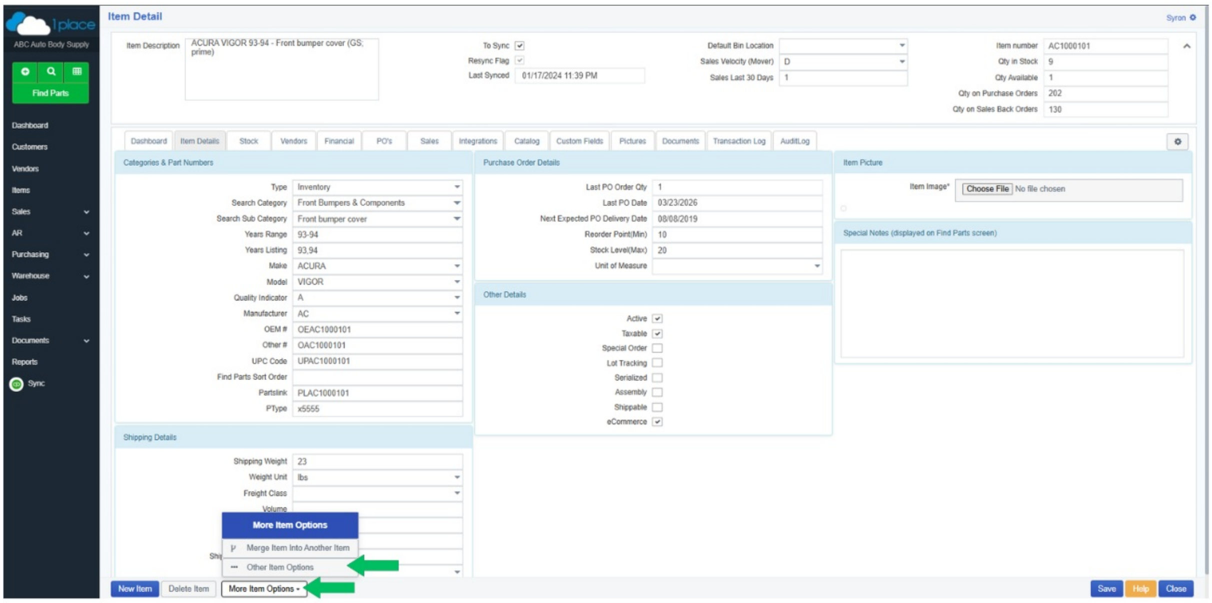
To Open the Item Detail Screen, from the left-hand menu in 1place, click **Items.**
This will open the **Item List**. In the **Item List**, locate the **item** you would like to view. Click on the **item**. The Item Detail Screen will open.
On the Item Detail Screen header, below the Default Bin Location, you will see:



- **Sales Velocity (Mover) –** Displays the assigned category (A, B, C, D, etc.)
- **Sales Last 30 Days –** Displays the average number of units sold per month

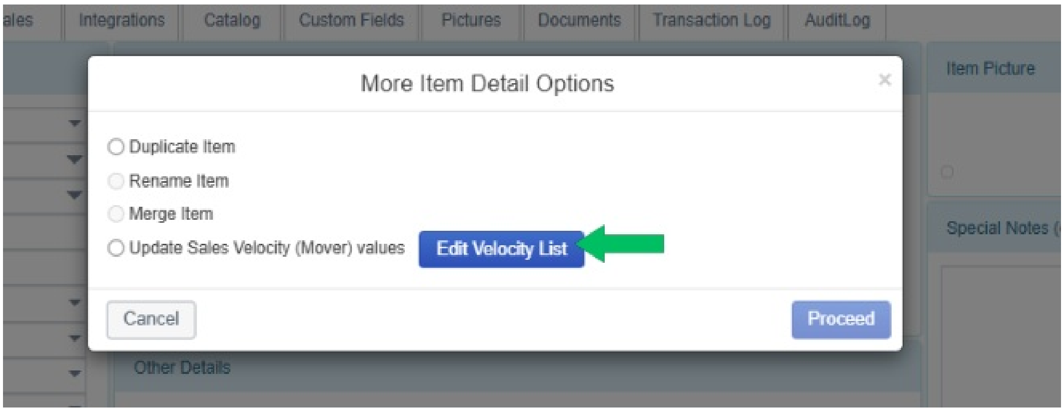
1. Open an **item**.

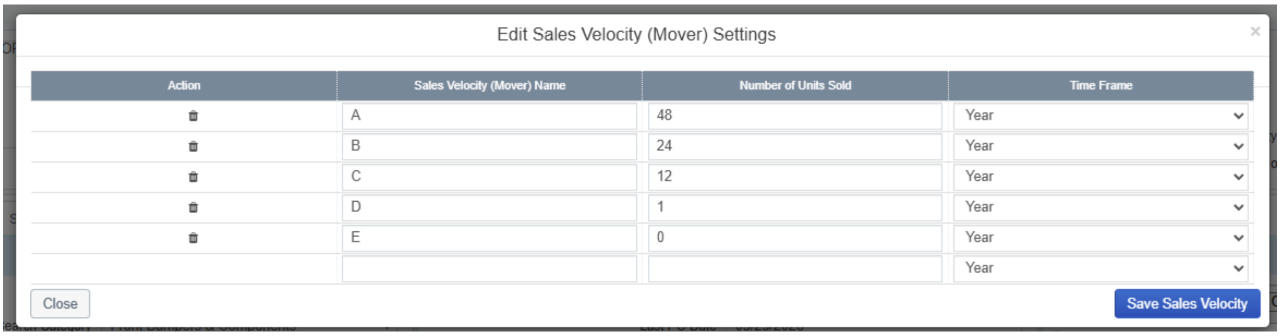
2. Click **More Item Options.**



3. Select **Other Items Options.**

4. From the **More Item Details Options**, click the **Edit Velocity List** button





In the **Edit Sales Velocity (Mover) Settings** screen, you define the rules used to categorize items based on how quickly they sell. Each **column** plays a specific role in determining the final **Sales Velocity (Mover) value**.

You will see the following columns:

- **Action** - contains a **delete** button to delete a row.
- **Sales Velocity (Mover) Name** – This is the **label** assigned to items that meet the rule.
  - Common examples: **A, B, C, D**
  - You can **customize** these labels if needed
  - Typically used to represent:
    - **A** = Fast-moving items
    - **D** = Slow-moving items
  - **NOTE:** This is what will appear in the **Sales Velocity (Mover) field** on the item.
- **Number of Units Sold** – This defines the **minimum quantity sold** required for an item to qualify for that category.
  - The system compares an item's sales against this number
  - Each row acts as a threshold
  - The system evaluates these values to determine which category the item belongs to.
- **Time Frame** – This determines how far back the system looks when calculating sales.
  - Month - Looks at the last 30 days
  - Year - Looks at the last 365 days

The system evaluates these rules and assigns the appropriate category to each item based on its sales history. Once done with defining these rules, proceed with **updating the sales velocity values.**

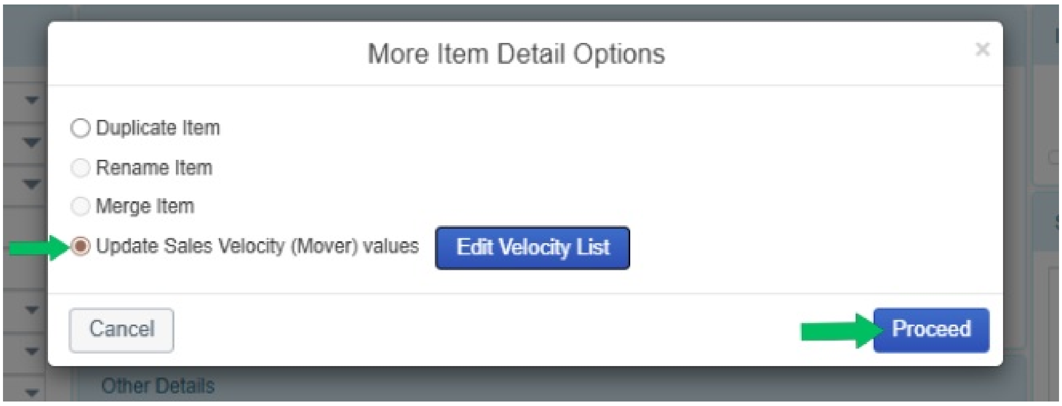
To update the Sales Velocity Values

1. Go to **More Item Options.**

2. Select **Other Items Options.**

3. From the **More Item Details Options**, select **Update Sales Velocity (Mover) values.**

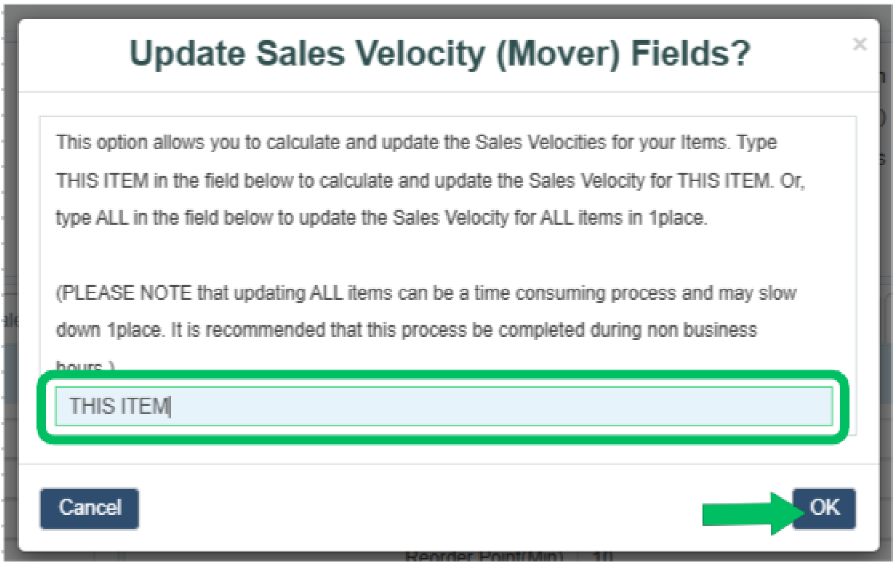
4. Click **Proceed.**



5. You will be prompted to type any of these two options on the prompt:

    1. **THIS ITEM** - Updates only the current item

    2. **ALL -** Updates all items in the system



NOTE: Updating **ALL items** may take time. It is recommended to run this **after business hours**.

If using **Year:** The system calculates monthly average: **Total Sold ÷ 12**
If using **Month:** The system uses actual sales from the last 30 days

1. Open the **Item List Screen**.

2. Click the **Item List Settings** (gear icon) located in the upper-right corner of the screen beside the **share** button.

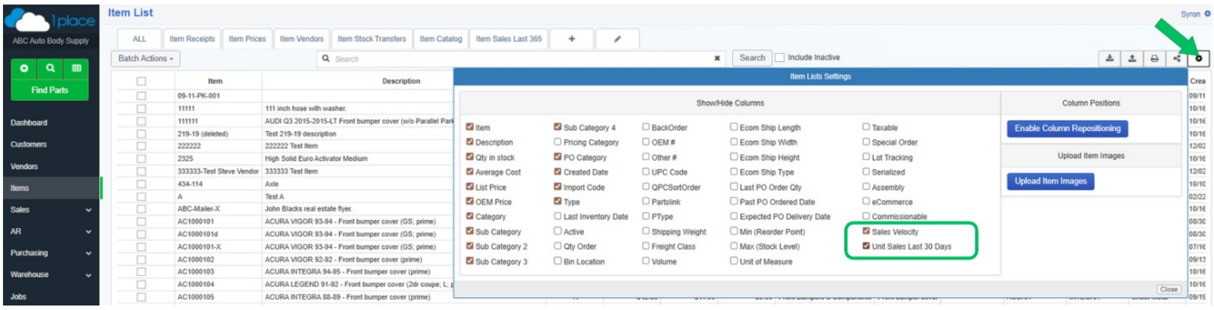
3. In the **Show/Hide Columns** section:

    - Find **Sales Velocity (Mover)**

    - Find **Unit Sales Last 30 Days**

4. Check the **boxes** next to both fields to enable them.

5. The selected columns will now appear in your **Item List.**



You can now easily view each item's sales performance directly from the list.

Available Soon