List Screens - How To's

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Overview

A List Screen is available for each major record type in 1place, such as Customers, Vendors, Invoices, Sales Orders, and other records.

List Screens are designed to help you quickly view, search, manage, and organize records. Depending on the record type, you can use a List Screen to:

- View records of a specific type.
- Search for records using keywords or other criteria.
- Create Custom Tabs to display a specific group of filtered records.
- Add new records individually.
- Import records from a spreadsheet.
- Export records from 1place.
- Customize the columns displayed on the screen.
- Access help related to the screen and its functions.

Help Topics

- List Screen - Common Tasks
  - How to Open a List Screen
  - How to Customize List Screen Columns
  - How to Add a New Record
  - How to Import Records
  - How to Export Records
  - How to Print Records
  - How to Add a Custom Tab
  - How to Edit or Delete a Custom Tab
- Customizing the Screen Design
- Getting Help

List Screen - Common Tasks

How to Open a List Screen

There are several ways to open a List Screen.

From the Main Menu

1. From the left navigation menu, click the record type you want to view.

2. The corresponding List Screen will open.

For example:

- Click Customers to open the Customer List.
- Click Vendors to open the Vendor List.
- Select another record type to open its corresponding List Screen.

Using the Quick Access Keys

1. Click the List button in the upper-left corner of the screen.

2. Select the record type you want to view.

Using Shortcut Keys

You can also use the available Shortcut Keys to quickly open specific List Screens.

How to Customize List Screen Columns

You can customize a List Screen by choosing which columns are displayed, changing their order, and adjusting their width.

Show or Hide Columns

1. Click the Gear icon on the List Screen.

2. Select or clear the columns you want to display.

3. The selected columns will be shown on the List Screen.

Move Columns

1. Click the Gear icon.

2. Click Enable Column Repositioning.

3. Click and drag the columns to arrange them in your preferred order.

4. Close the column settings when finished.

Resize Columns

1. Position your mouse between two columns.

2. When the resize option appears, click and drag to adjust the column width.

How to Add a New Record

You can add a new record directly from its List Screen.

Option 1 - Using the Plus Icon

1. Click the + icon on the top navigation bar.

2. Select the type of record you want to add.

3. The corresponding Add New screen will open.

4. Enter the required information.

5. Click Save.

Shortcut keys may also be available for adding specific record types.

Option 2 - Using the New Button

1. Open the List Screen for the record type you want to add.
2. Click New in the lower-left corner.
3. The Add New screen will open.
4. Enter the required information.
5. Click Save.

Save and Add Another Record

If you need to add another record after saving:

1. Click the drop-up arrow next to the Save button.
2. Select Save and Add New.
3. The current record will be saved.
4. A new Add New screen will open.

How to Import Records

The Import Wizard allows you to add multiple records to 1place using a spreadsheet.

Step 1 - Open the Import Wizard

1. Open the appropriate List Screen.
2. Click the Import icon in the upper-right corner.
3. The Import Wizard will open.

Step 2 - Select the Import Type

1. Click the drop-down arrow.

2. Select the appropriate Import Type.

Step 3 - Select the Import File

1. Click Browse.

2. Locate and select the spreadsheet containing the records you want to import.

Step 4 - Map the Columns

The Import Wizard can automatically map columns when the names in your spreadsheet match the corresponding database column names.

If the names do not match:

1. Locate the appropriate field under Excel Columns.

2. Click the drop-down arrow.

3. Select the spreadsheet column that corresponds to the appropriate Database Column.

4. Repeat as needed for the remaining fields.

Step 5 - Import the Records

1. Review the column mappings.

2. Click Proceed.

3. A confirmation message will appear when the import has completed.

Note: The Import Wizard also includes options such as Saved Templates and Import New Records. Instructions for these options can be added to the applicable Import Wizard article.

How to Export Records

You can export selected records from a List Screen to an Excel file.

Step 1 - Select the Records

1. Check the box beside each record you want to export.

2. To select all available records, click the checkbox in the field-name row.

Note: The top checkbox can be used to select all records on the current page or the entire list, depending on the available selection options.

Step 2 - Export the Records

1. Click the Export icon in the upper-right corner.

2. A confirmation message will appear.

3. Click Yes to proceed.

An Excel file will be downloaded.

4. Open the downloaded file to view the exported records.

How to Print Records

Before using the print function, make sure the OneSourcePrinterConnectApp is installed.

For installation instructions, see OneSource Printer Connect - How To's.

To print records:

1. Open the List Screen for the record type you want to print.

2. Click the Print icon in the upper-right corner.

3. Follow the available print options to complete the process.

How to Add a Custom Tab

Custom Tabs allow you to create a saved view of records based on specific fields and filter conditions.

To create a Custom Tab:

1. Click the + icon next to the existing tabs.

2. The New Tab Wizard will open.

3. Enter a Tab Name.

4. Select the Field Sources you want to display.

5. Edit the Field Names as needed.

6. Set the desired Filter Conditions.

7. Click Save.

The new Custom Tab will appear on the List Screen.

Note: Custom Tabs are saved to the individual user's 1place Cloud account. They are not automatically available to other users.

How to Edit or Delete a Custom Tab

You can edit or delete Custom Tabs that you have created.

To Edit a Custom Tab

1. Click the Pencil icon on the List Screen.

2. The Custom Tabs List will open.

3. Locate the Custom Tab you want to modify.
4. Under the Action column, click the Pencil icon.
5. Make the necessary changes.
6. Click Save.

To Delete a Custom Tab

1. Click the Pencil icon on the List Screen.
2. The Custom Tabs List will open.
3. Locate the Custom Tab you want to remove.
4. Under the Action column, click the X icon.
5. Confirm the deletion.

Customizing the Screen Design

1place provides Custom UI Design settings that allow users to personalize the appearance of the system.

To customize the screen design:

1. Click the Gear icon in the upper-right corner.
2. Select Settings.
3. Under System, click the drop-down arrow.
4. Select Custom UI Design.
5. The Global Settings screen will open.
6. Customize the available design options, such as font sizes, font styles, and background colors.
7. Click Save.

Getting Help

1place provides several ways to access help and support.

Help Button

Many screens include a Help button that provides access to articles related to the features and functions available on that screen.

Knowledge Base

The Knowledge Base contains self-help articles covering 1place features and functions.

To access the Knowledge Base:

1. Click Knowledge Base on the left navigation bar.

2. Browse the available topics and subtopics.

3. Select an article to view the instructions.

Email Support

Send your questions or concerns to support@onesourcesoftware.com.

Contact OneSource

For live technical support, contact OneSource at 1 (801) 748-4804.

Create a Support Ticket

Go to the OneSource Support page to submit a support request.

Remote Assistance

For remote assistance, go to the OneSource Support page.