Record Numbering - How To's

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Overview

Record Numbering controls how 1place assigns numbers to Customers, Vendors, Quotes, Sales Orders, Invoices, Credit Memos, Purchase Orders, and other records.

Use these settings to choose automatic or manual numbering and configure prefixes for your company's numbering structure. Available options vary by record type.

1. Open Record Numbering

1. Click the **Settings** icon (⚙) in the upper-right corner of 1place.
2. Go to **System → Record Numbering**.

2. Configure Numbering for Each Record Type

Find the record type you want to configure, then review its available settings.

- **Next Number** - Sets the number 1place will assign to the next record when automatic numbering is used.
- **Manual** - Allows you to enter the record number yourself. For example, you may use a customer's phone number as their Customer #.
- **Sequential** - Assigns record numbers automatically in sequence.
- **Date Format** - Sets a date-based numbering format, where available.
- **Prefix** - Adds identifying text or characters to the record number.

Repeat for each record type you need to configure.

3. Configure Invoice Numbering

Under **Invoices**, review these options:

- **Use Sales Order # When Creating Invoice:** Select this option to use the Sales Order # as the Invoice # when creating an invoice from a Sales Order.
- **Define Prefix by Warehouse:** Check this option to assign different prefixes to records based on the warehouse.

If you enable **Define Prefix by Warehouse**, continue to the next section.

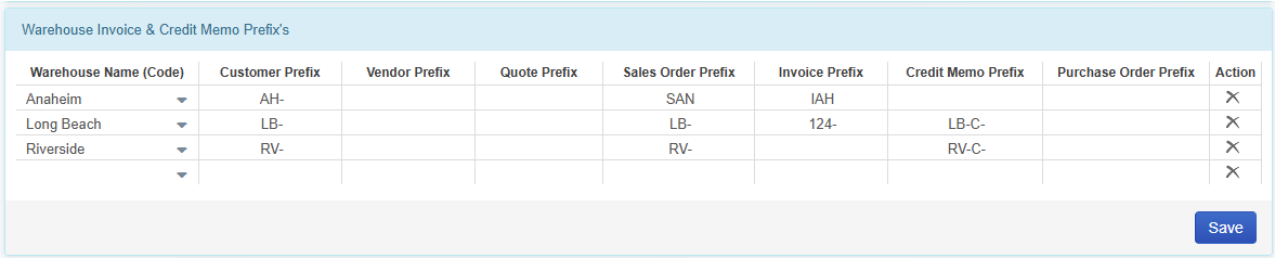
4. Configure Warehouse Prefixes, If Needed

In the **Warehouse Invoice & Credit Memo Prefix's** section, select a warehouse and enter the applicable prefixes:

- **Customer Prefix**
- **Vendor Prefix**

- **Quote Prefix**
- **Sales Order Prefix**
- **Invoice Prefix**
- **Credit Memo Prefix**
- **Purchase Order Prefix**

Here's a sample:



Repeat for each warehouse that needs its own prefixes.

5. Finish and Verify

Review your settings, then close the Settings screen.

The updated numbering settings will apply to new records. When you next create a record, check that its number and prefix match your intended numbering structure.