

Record Numbering - How To's

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How to Setup Record Numbering in 1place

Overview

Use **Record Numbering** to set how 1place assigns numbers to Customers, Vendors, Sales Orders, Purchase Orders, Invoices, and other records.

Steps:

1. Open Settings

Click the ⚙ **Settings** icon in the upper-right corner of the 1place screen.

2. Go to Record Numbering

Navigate to:

System → Record Numbering

3. Setup Record Numbering

Configure the numbering for each record type as needed.

You can set:

- **Next Number** – The number 1place will use for the next record.
- **Manual** – Enter record numbers manually.
 - This allows you to create your own #, such as a Customer # that is something different than a Sequential #, such as a Customer's Phone #.
 - This setting may also become needful if your company ever needed to re-enter Sales Orders again (if it ever becomes necessary to restore/re-enter Sales Orders that have already been created and printed, due to a lost of data, which is very rare).
- **Sequential** – Automatically assign numbers in sequence.
- **Date Format** – Use a date-based numbering format (where available).
- **Prefix** – Add a prefix to the record number.

4. Configure Invoice Settings

Under **Invoices**, configure available options such as:

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

5. Configure Warehouse Prefixes

When **Define Prefix by Warehouse** is checked, the **Warehouse Invoice & Credit Memo Prefix's** section will open.

Select the warehouse and enter the desired prefixes for :

- Customer Prefix
- Vendor Prefix
- Quote Prefix
- Sales Order Prefix
- Invoice Prefix
- Credit Memo Prefix
- Purchase Order Prefix

5. Save / Close

Once the desired settings are configured, close the Settings screen. The updated numbering will be used for new records.

Complete the Setup

Review the Record Numbering and Invoice settings to make sure they match the company's desired numbering structure.
