Settings Screen

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Help Topics

This screen holds all the required and preferred settings for all screens in the system.

To go to **Settings** screen, click on the **gear icon** (top right corner of screen) then select **Settings**.

Company Details

Company Details (section)

Company ID - Your ID number assigned by 1place.
Company Name
Company Contact Name
Email Address
Company Website
Phone Number
Address

Company Logo (section)

Add/Change Logo
Delete Logo

Products & Services

Type of Business (section)

Type of Company - Select the type of company or nature of your business from the dropdown list.

Industry Specific Field Names (section) - These are fields that can be changed depending on the industry. We usually type **Partslink #** in the **Alt#1** and **PType** in the **Alt#2** fields for Auto body.

Alt #1
Alt #2

Services (section) - Select if **Yes** or **No** (by clicking on the circle icon to highlight it). Note: Make sure to select the correct option as this affects some settings and interface of screens.

We sell our services.
We track our services as Jobs (or Projects).
We install the products we sell.

Products (section) - Select if **Yes** or **No** (by clicking on the circle icon to highlight it). Note: Make sure to select the correct option as this affects some settings and interface of screens.

We sell Inventory. *If selling goods in stock.*
We stock inventory. *If storing items in one or more warehouse(s).*
We deliver the products we sell. *This allows you to properly set your 1place account to track your order and delivery status.*
We buy inventory in 'sea containers'.
We need to be able to 'catalog' our items by the Year, Make, and Model. *For auto body inventory.*
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.

Subscription Info

Price Details (section)

Enter (type in) **Number of Users**
Subscription Type - See Subscription Info section for specific features included per type.
Price Per User - Current Price as indicated in the box. Note: OneSource shall officially inform clients in advance should there be any change.
Total Monthly - Number of Users x Price per User
Credit Card Info (button) - Click this to enter your credit card details.

Cancel Subscription (button) - You may cancel your subscription anytime. Doing so will remove your access to your data. Should you decide to re-activate your account, contact OneSource. You may send an email to **support@onesourcesoftware.com** or talk to a live tech support agent at **1 (801) 748-4804**.

Subscription Info (section) - This shows the pricing, number of Users and specific feature inclusions per subscription type.

Refer to **User Security - How To's** for further details.

Generate a list of Users in Excel format by clicking on '**Export User List Template**'.

Import Users list and other information using the **Import Wizard** by clicking on '**Import User List Template**' button.

1place provides a way to make adding customer records even quicker and more accurate through preset preferences. To do this, click on the **Gear icon** on the top right corner of the screen then select **Settings>Customers**.

New Customer Defaults (section)

Key in the following information under New Customer Defaults to autofill these fields every time you add a new Customer.

- **Address Type**: Bill To, Ship To or Both
- **Customer Type**: Create any Type name.
- **Customer Subtype**: Create any Subtype name.
- **Shipped Via**: The shipping method.
- **Warehouse**: The default warehouse that will be assigned to the new record.
- **Pricing Method**: The default pricing method (Discount, Multiplier, Markup, Item Price Level)
- **Pricing Value**: Pricing Level (on 'Add New Customer or Prospect' screen)
- **Custom Pricing Template**: Select from your Pricing Templates (created on Sales > Pricing Templates).
- **Tax Exempt**: Check box to enable 'Tax Exempt' as default.

Customer 'Auto Fill' Profiles (section)

This is an added (optional) feature that can also help you autofill various data needed on the **Add New Customer or Prospects** form every time you add a new Customer record. To do this, you must:

- Create and define your own Customer Default Profiles. Go to **Settings>Customers>Customer 'Auto Fill' Profiles** then click on the **New** button to add a profile.
- Key in the following information on the **Customer Default Profile** popup screen:
  - **Profile Name**: Create any name.
  - **Address Info**: The default City, State, Region and Country of the Customer.
  - **Shipped Via**: The default Shipping method that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
  - **Type**: The default Type of customer or prospect. This is a user definable value to help categorize, group, and classify your records.
  - **SubType**: Similar to the Type, this is a user definable value to help categorize, group, and classify your records.
  - **Tax**: The default Sales Tax code that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
  - **Tax Exempt**: Check the box if exempted from tax. This will activate the 'Reason for Exemption' text box.
  - **Payment Terms**: The default Payment Terms that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
  - **Payment Methods**: The default Payment Method for the particular customer.
  - **Credit Limit**: The default Credit Limit that will be assigned to the particular customer.
  - **Credit Days**: The default number of Credit Days for the particular customer.
  - **Default Pricing Method**: The default method of pricing that will be assigned to the particular customer.
  - **Warehouse**: The default warehouse for the particular customer.
  - **Pricing Template**: Select from your Pricing Templates (created on Sales > Pricing Templates).
  - **Sync with QuickBooks Online**: Check the box to automatically sync Customers (tagged under this Default Profile) with QuickBooks Online.
  - Note: You can create an unlimited number of profiles.
- Now that you have created your **Customer 'Auto Fill' Profiles**, you may use these profiles to add new Customer records faster and more accurately.
- On the **Add New Customer or Prospects screen** (when adding a new Customer) select the **Customer Default Profile Name** from the **Auto Fill Profile drop down** list. All entered default settings (above) related to the selected profile will be automatically filled.

QBO Customer Type (section)

Check the '**Sync with Quickbooks**' **box** per **Customer Type** to automatically enable syncing when adding a new customer of that type.

Task Preference

Check the box(es) to enable the following pop-up message prompts:

- **Prompt User when posting a (completed) Task on a date other than the date of the Task.**
- **Prompt User when posting a (completed) Task to reschedule another follow up Task.**

Auto Create New Task - You can automatically create tasks from emails of your clients when you assign a prefix and type it in the box.

Job Preferences (section)

JobList New Count Background Color (section)

Job Types (section) - You can set your own Job Types and decide how you want to name them. Check the **Active** box to make that particular Job Type appear on the **Type (dropdown button)** on the **Job Details screen** and on the **Add New Job/Project pop-up screen** when adding a new Job record.

Job Status (section)

Job Sub Types (section)

Job List Settings (section)

Job Default Settings (section)

Job Email Settings (section)

Email Templates (section)

New Item Defaults (section)

- **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 the Sales 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 (section) - Check Yes/No to enable specific settings for the following preferences:

- 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 (section) - Check the box to activate specific **Item Tabs**. These will appear on the **Item Details screen**.

Item Pricing Levels (section) - Set as many Price Codes with specific Discount % and name them however you want.

Picture Settings (section)

Warehouse Settings

- **General Settings (section)**
  - To add another Warehouse (if having two or more Warehouses):
    - Check the **Enable Multi-Warehouse Functionality** box.
    - Follow instruction below to add the Warehouse(s).
- **Warehouse List (section)**
  - Click on the **New** button to add new warehouse.
    - 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 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.

Shipping/Receiving

- **Email Notifications (section)**
  - Enter email address(es) to notify when orders are short picked.
- **Shipping - Sales Order Statuses (section)**
  - **Columns**
    - **Action -** You can reorganize the sequence of the **Statuses** when you click and drag the **square icons** under **Action** column.
    - **Active -** Check the selected boxes to activate the particular **Sales Order Status.**
    - **Show on Shipping & Receiving -** Check the box to make it appear on the **Shipping & Receiving screen** under **'Items to Ship' section** on the left.
    - **Status -** The Shipping-Sales Orders Statuses.
    - **User Defined Status Name -** You may choose to name each Status however you want to call them.
    - **Next Status -** The status next to the one on the left.
    - **Status Description**
      - **New -** This is the default status assigned to a Sales Order when it is first created. It will remain in this status until the Order is Printed or until the Submit Order button is clicked.
      - **To Print & Pick** - This means the Sales Order is waiting to be Picked by Warehouse personnel.
      - **Picking** - This means the Sales Order is in the process of being picked by Warehouse personnel.
      - **Pending** - This places the Sales Order on 'Hold' until such time that it is manually changed by a user to one of the other Statuses.
      - **To Pack** - This means the item is ready to be packed into Boxes for shipping.
      - **To Cancel/Restock** - This means the ITEM(s) have been removed from the Sales Order and need to be put back on the shelf.
      - **To Invoice** - This means the Item is ready to be Invoiced.
      - **Waiting To Be Purchased**
      - **Waiting For Delivery From Vendor**
      - **To Dispatch** - This shows the Sales Orders that are waiting to be Scanned onto the delivery vehicle.
      - **To Load/Ship** - This means the item is staged, ready to be shipped or loaded into a delivery vehicle.
      - **In Route to Customer** - This means the Sales Order is out for delivery.
      - **Closed** - This means the Sales order has been Invoiced and Delivered and is now closed.

- **Can Add Line Items -** Check this box to enable User to add line items when Sales Order is on a specific Status.
- **Can Edit Line Items -** Check this box to enable User to edit line items when Sales Order is on a specific Status.
- **Can Delete Line Items -** Check this box to enable User to delete line items when Sales Order is on a specific Status.
- **Can Delete Order -** Check this box to enable User to delete Sales Orders for that specific Status.
- **User Notes**

- **Receiving - Purchase Order Statuses (section)**
  - **Columns**
    - **Action -** You can reorganize the sequence of the **Statuses** when you click and drag the **square icons** under **Action** column.
    - **Active -** Check the selected boxes to activate the particular **Purchase Order Status.**
    - **Show on Shipping & Receiving Screen -** Check the box to make it appear on the **Shipping & Receiving screen** under '**Items to Receive**' section on the left.
    - **Status -** The Receiving-Purchase Orders Statuses.
    - **User Defined Status Name -** You may choose to name each Status however you want to call them.
    - **Status Description**
      - **New -** This means the PO is in the process of being created.
      - **Pending -** This places the PO has been placed on 'Hold' until such time that it is manually changed by a user to one of the other Statuses.
      - **Waiting for Delivery -** This means the Purchase Order has been sent and is now waiting for Delivery.
      - **In Route to Warehouse - T**his means the Purchase Order has been shipped and is now In Route.
      - **On Dock -** This means the Purchase Order has arrived and is at the Dock or waiting to put pulled up to the Loading Dock.
      - **Received -** This means the Purchase Order has been completely Received.
    - **Can Add Line Items -** Check this box to enable User to add line items when Purchase Order is on a specific Status.
    - **Can Edit Line Items -** Check this box to enable User to edit line items when Purchase Order is on a specific Status.
    - **Can Delete Line Items -** Check this box to enable User to delete line items when Purchase Order is on a specific Status.
    - **Can Delete Order -** Check this box to enable User to delete Purchase Orders for that specific Status.
    - **User Notes**

- **Stock Transfer Statuses (section)**
  - **Columns**
    - **Action -** You can reorganize the sequence of the **Statuses** when you click and drag the **square icons** under **Action** column.
    - **Active -** Check the selected boxes to activate the particular **Purchase Order Status.**
    - **Status -** The **Stock Transfer** Statuses.
    - **User Defined Status -** You may choose to name each Status however you want to call them.
    - **Status Description**
      - **To Print & Pick -** This means the Stock Transfer Needs to be Printed & Picked.
      - **Picking -** This means the Stock Transfer is now being Picked.
      - **To Dispatch -** This shows the Stock Transfer that are waiting to be Scanned onto the delivery vehicle.
      - **To Cancel -** This means 1 or more of the ITEMS on the Stock Transfer needs to be put back on the shelf.
      - **To Load / Ship -** This means the Stock Transfer has been Picked and is now waiting to be loaded and shipped.
      - **In Route -** This means the Stock Transfer is now In Route to the 'Transfer To' Warehouse.
      - **Received -** This means the Stock Transfer has now been Received in the 'Transfer To' Warehouse.
      - **Closed -** This means the Stock Transfers are Delivered and is now closed.

Scanning & Barcoding Settings

- **Show osScan details on transaction screens -** Check this box to enable showing os scanning details on transaction screens when you purchase the 1place Scanning & Warehouse Management System.

When PO Cost is changed on a PO Line Item - When you are on the Purchase Order details screen and you decide to change

Sales Settings

- **General Sales Settings (section)**
  - Select if **Yes** or **No**:
    - We sell our services.
    - We sell our inventory
    - We need to be able to 'catalogue' our items by the Year, Make and Model.
- **Sales (section)**
  - Default Ship To Search Values
  - Lot 1 Label Name
  - Lot 2 Label Name
  - Auto fill the Sales Rep field with the currently logged in user name (checkbox)
- **Decimal Settings (section)**
  - Number of Decimal Places - for Price fields
- **Payment terms (section)**
  - Type in all payment terms that you offer to your clients including the details as follows:
    - **Payment Term Name**
    - **Type**
    - **# of Days**
    - **Day of Month**
    - **Date Last Synced**
- **Payment Method (section) -** Store as many payment methods (check, credit card, cash, credit memo etc)
- **Shipped Via (section)** - Shipping method
- **Source of Order (section)** - Identifies where the order originated from.

Sales Taxes

- **Tax Code Creation Method (section)**
  - Manual Sales Tax Code Creation
  - Semi-Automated Tax Code Creation
  - Automated Tax Code Creation
- **Sales Tax Rates (section)**
  - **Code**
  - **Tax Percent**
  - **Zip Code**
  - **QBO Sync**
  - **QBO Created Date**
  - **Last date/time edited**

Find Parts

- **Find Parts Layout Type**
- **Find Parts (Auto) - Other Settings**
- **Model drop down list**
  - Checking the box will make the **Model dropdown list** to appear even if you don't enter the **Year** and **Make**.
- **Prompt user if the same Customer Quote already exists**
  - Checking the box will enable you to get notified that IF a Quote already exists WHEN the same Customer requests for the same Year, Make and Model.
- **Find Parts (Auto) Quick Category Buttons**
  - This feature enables you to create little buttons for your **Parts Category** to make them appear on the **Find Parts Screen** where you can easily see and click to quickly find the item you are looking for.

Quotes Settings

- **Quotation Preference**
- **Custom Terms & Conditions (printed on bottom of Quote)**
  - S**elect Quote Type** from the dropdown list to enable customization for that particular type.
- **Quotation - Custom Terms & Conditions (printed on bottom of Quote)**
  - Customize any writing that you need to put at the bottom of your Quote form.

Sales Order Settings

- **Sales Order Preferences (section)**
  - **Tab All Fields**
    - Checking this box will enable you to navigate to **ALL** of the editable fields on the **Sales Order screen** using the tab key (of your keyboard).
    - If this box is unchecked, you can only navigate to the following fields using the tab key:
      - Bill To Name
      - Ship To Name
      - Warehouse
      - Customer PO
      - Comments
      - Tax
      - Freight/Other
      - Save (button)
      - Help (button)
      - Print (button)

- Send Email (button)
- New (button)

Auto-Fill Ship Qty With Order Qty
Auto Print Sales Order (when the Create Invoice & Print button is clicked).
Auto Print Invoice (when the Create Invoice & Print button is clicked).
Auto Calc Net Available.
Prompt user to split line items for partially shippable quantities.
After adding an item to a Sales Order, auto select the Sales Order line item 'PO' checkbox when the item is out
Make a Back Order when converting a Sales Order to an Invoice when 1 or more line items have quantities in the

Custom Terms & Conditions (printed on bottom of Invoice)

Select the specific document form that you want to customize on the S**elect Sales Order Type** (from the dropdown list).

Invoice - Custom Terms & Conditions (printed on bottom of Invoice.)

Customize any writing that you need to put at the bottom of your Sales Invoice form.

Invoices/Credit Memo's

Credit Memo Reasons -Input the **ReturnCodes** on this table to make it appear on the **dropdown list selection** on **Credit Mem**

- **Return Code -** Your own name or code (e.g. Overpayment, Damaged Part, etc)
- **Description**
- **Reason Type -** The reason which resulted to the creation of the Credit Memo.
- **Number Days -** The validity period for the return of the item.
- Note: Click on the **Save** button after adding or editing the **Credit Memo Reasons** table.

Credit Memo Statuses (section)

Columns

- **Action -** You can reorganize the sequence of the **Credit Memo Statuses** when you click and drag the **square icons** under **Action** column.
- **Active -** Check the selected boxes to activate the particular **Credit Memo Status.**
- **Status -** The Credit Memo Statuses.
- **User Defined Status -** You may choose to name each Status however you want to call them.
- **Next Status**
- **Status Description**
  - **New -** This is the default status assigned to a Credit Memo when it is first created.
  - **RA Requested**
  - **RA Denied**
  - **RA Waiting for Parts**
  - **RA To Dispatch**
  - **RA To Inspect**
  - **RA Return Money**
  - **RA Create Credit**
  - **RA Completed**
- **Can Add Line Items -** Check this box to enable User to add line items when Credit Memo is on a specific Status.
- **Can Edit Line Items -** Check this box to enable User to edit line items when Credit Memo is on a specific Status.
- **Can Delete Line Items -** Check this box to enable User to delete line items when Credit Memo is on a specific Status.
- **Can Delete Order -** Check this box to enable User to delete the for that specific Status.
- **User Notes**

Invoices / Credit Memo's Preference
Custom Terms & Conditions (printed on bottom of Invoice.)
Invoice - Custom Terms & Conditions (printed on bottom of Invoice.)

1place allows you to add custom fields so you can store more values and unique data that are not on the default interface.

Click on **'Add Custom Fields'** button to add a custom field.

- Enter (on the '**Add New Custom Fields'** pop-up screen):
  - **Field Name**
  - **Field Data Type**
  - **Field Module**
  - **Field Description**
  - **Display Field Width**
  - **Form Column**
  - **Tab Order**
- Check the box if you want the Custom Field to be:
  - **Visible on Add New Screen**
  - **Visible on Detail Screen**
  - **Visible on Summary List Screen**
- Click **Save**.

Edit Custom Fields (pop-up screen)

- **Field Name**
- **Field Data Type** - Uneditable
- **Prompt User to Add New Values on the Fly (checkbox)**
  - This (checkbox) option only appears when you select **Dropdown List** as the **Field Data Type**. Checking this box enables you to enter new values. A pop-up message that says '**Value Not in List**' will appear if you enter a value that

is not on the dropdown list. Click '**Yes**' to enter and store that new value.
You can store as many dropdown list values as you can right at the bottom of the **Edit Custom Fields screen**. You can easily delete a value by clicking on the **X icon**.

- **Field Module -** Uneditable
- **Field Description -** Any note that describes the **Field Name**.
- **Display Field Width** - Select from the available sizes on the dropdown list.
- **Visible on Add New Screen (checkbox)**
- **Visible on Detail Screen (checkbox)**
- **Visible on Summary List Screen (checkbox)**
- **Form Column**
- **Tab Order**

Record Number Settings

- Record Numbering
- Invoices

Custom UI Design

Global Settings