

Test Mode (How it Works)

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The Purpose of Test Mode

Test Mode helps users learn and practice using 1place by working with test data instead of changing their company's existing records.

1place

ABC Auto Body Supply

Find Parts

Dashboard

Customers

Vendors

Items

Sales

AR

Purchasing

Warehouse

Job

Tasks

Documents

Reports

Sync

DashBoard (TEST MODE)

Syrin

Type	Description	Kba Description	Kba Url
Customers	Create 1 or more Test Customer's using the + Menu (button).	How to Add a New Customer Record	http://kb.onesourcesoftware.com/support/kb/article/AA-02643602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Customers-Create-1-or-more-Test-Customer-s-using-the-Menu-button
Customers	Assign Default Pricing to a Customer (while making, or after made).	Select a Default Pricing Method	http://kb.onesourcesoftware.com/support/kb/article/AA-02766602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Customers-Assign-Default-Pricing-to-a-Customer-while-making-or-after-made
Customers	Create 1 or more Test Customer's using the + Menu (button).	Add Customer Pricing Template	http://kb.onesourcesoftware.com/support/kb/article/AA-02766602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Customers-Create-1-or-more-Test-Customer-s-using-the-Menu-button
Customers	Schedule 1 or more Tasks related to a Contact (on the Customer Contact tab).	Add a contact record	http://kb.onesourcesoftware.com/support/kb/article/AA-02643602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Customers-Schedule-1-or-more-Tasks-related-to-a-Contact-on-the-Customer-Contact-tab
Customers	Schedule 1 or more Tasks on the Task List screen.	Create a Task related to a Customer	http://kb.onesourcesoftware.com/support/kb/article/AA-02643602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Customers-Schedule-1-or-more-Tasks-on-the-Task-List-screen
Find Parts	Spend time reviewing ALL the buttons, fields, and features on the Find Parts screen.	How to use the KBA System.	http://kb.onesourcesoftware.com/support/kb/article/AA-02965602/Find-Parts-screen-Automotive-Year-Make-Model-format-How-To.html#How-To-Test-Mode
Find Parts	Create 1 or more Test Customers using Find Parts screen.	Find Parts screen (Automotive - Year, Make, Model format) - How To's	http://kb.onesourcesoftware.com/support/kb/article/AA-02965602/Find-Parts-screen-Automotive-Year-Make-Model-format-How-To.html#How-To-Test-Mode
Find Parts	Create 3 or more Quotes using Find Parts screen.	Create New Customer using the Find Parts Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02755608/C2%40Customer%20Wants%20to%20Place-a-Quote
Find Parts	Create 3 or more Sales Orders using the Find Parts screen.	Create Quotes using the Find Parts Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02755608/C2%40Customer%20Wants%20to%20Place-a-Quote
Find Parts	Open a Customer record from the Find Parts screen.	Create a Sales Order using the Find Parts Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02965602/Find-Parts-screen-Automotive-Year-Make-Model-format-How-To.html#How-To-Test-Mode
Find Parts	Open an Item record from the Find Parts screen.	How can I open a customer record from the Find Parts Screen?	http://kb.onesourcesoftware.com/support/kb/article/AA-02965602/Find-Parts-screen-Automotive-Year-Make-Model-format-How-To.html#How-To-Test-Mode
Quotes	Spend time reviewing ALL the buttons, fields, and features on the Quotes screen.	How can I open an item record from the Find Parts screen?	http://kb.onesourcesoftware.com/support/kb/article/AA-02965602/Find-Parts-screen-Automotive-Year-Make-Model-format-How-To.html#How-To-Test-Mode
Quotes	Create 1 or more Quotes using the + Menu	Overview of the Sales Quotes Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02791602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Quotes-Screen-How-To-Test-Mode
Quotes	Create 1 or more Test Customers using the Quotes screen.	How to Create a New Quote using the + Menu Button	http://kb.onesourcesoftware.com/support/kb/article/AA-02967602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Quotes-Screen-How-To-Test-Mode
Quotes	Schedule a Follow Up call on the Quotes screen.	How to add a new customer on the Sales Quotes Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02791602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Quotes-Screen-How-To-Test-Mode
Quotes	Print 1 or more Quotes.	How to Duplicate an Existing Quote	http://kb.onesourcesoftware.com/support/kb/article/AA-02791602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Quotes-Screen-How-To-Test-Mode
Quotes	Email 1 or more Quotes.	How to Print a Quote on the Quote Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02791602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Quotes-Screen-How-To-Test-Mode
Sales Orders	Spend time reviewing ALL the buttons, fields, and features on the Sales Order screen.	How to EMAIL Records (such as Quotes, Sales Orders, Invoices)	http://kb.onesourcesoftware.com/support/kb/article/AA-02755608/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/001-1place-Quick-Start-Guide-for-Sales-Customer-Service
Sales Orders	Create 1 or more Test Customer's using Sales Order screen.	How to Add a New Customer Record on the Sales Order Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Create 1 or more Sales Orders using the + Menu.	How to Add a New Sales Order Record	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Create 1 or more Sales Orders using the Find Parts screen.	How to Create a New Sales Order Record from the Find Parts Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Create 1 or more Sales Order from the Quotes screen.	How to Create a New Quote from the Quotes Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02791602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Quotes-Screen-How-To-Test-Mode
Sales Orders	Edit 1 or more Sales Order line items.	How to Add/Edit Sales Order Line Items	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Open a Customer record from the Sales Order screen.	How to Open a Customer Record on the Sales Order Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Open an Item record from the Sales Order screen.	How to Open an Item Record on the Sales Order Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Create a NEW PO for 1 or more items on Sales Order (with PO checkbox checked).	How To Create Purchase Order/s from Sales Order Screen	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Order-Screen-How-To-Test-Mode
Sales Orders	Add 1 or more items on Sales Order (with PO checkbox checked) to an Existing (Blanket) P...		
Sales Orders	Enter a Payment (Sales Order Deposit) on a Sales Order.		
Sales Orders	Print 1 or more Sales Orders.		
Sales Orders	Email 1 or more Sales Orders.	How to Send an Email Copy of a Sales Order	http://kb.onesourcesoftware.com/support/kb/article/AA-02792602/1place-cloud-Cloud-ERP/1place-cloud-User-How-To/Sales-Order-Screen-How-To-Test-Mode
Invoices	Spend time reviewing ALL the buttons, fields, and features on the Invoice screen.		
Invoices	Create 5 or more Invoices using the Sales Order screen.		
Invoices	Delete 1 or more Invoices on the Invoice screen.		
Invoices	Enter a Payment on an Invoice.		
Credits	Create a Credit Memo by returning 1 item on an Invoice.		
Invoices	Print 1 or more Invoices.		
Invoices	Email 1 or more Invoices.		
Invoices	Receive Payment on the Invoice Screen		

Refresh

HelpClose

With Test Mode, you can:

- **Practice Using 1place:** Learn how to create, edit, and delete records using practice data.
- **Protect Existing Company Data:** Practice workflows in a live database without modifying or accidentally deleting existing company records.
- **Track Your Progress:** Use the Test Mode Dashboard to see which types of records you have added, edited, or deleted as you learn.
- **Monitor User Progress:** Company 1place Administrators can use the Test Mode Dashboard to review the progress of all users.
- **Delete Test Data Easily:** Delete test records associated with your user account in one step using the **Delete All Test Data** button, where available.

Test Mode provides a safe way to build confidence, practice workflows, and prepare for using 1place in your company's daily operations.

Using 1place Test Mode

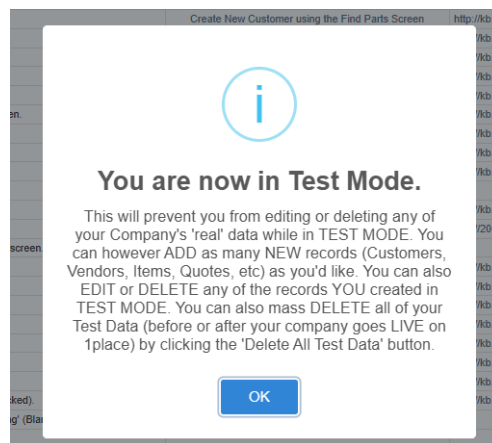
How does Test Mode work?

What Happens When Test Mode Is Turned On?

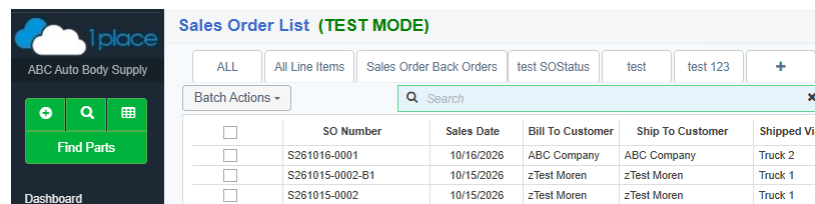
Test Mode allows you to practice using 1place and create test records without changing or deleting your company's existing data. It is useful for testing workflows, training users, and preparing for Go-Live.

When Test Mode is enabled, the following rules and indicators apply:

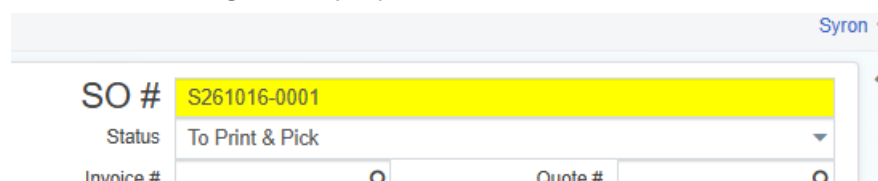
- **Protects Existing Company Data:** You cannot edit or delete existing company records while in Test Mode. However, you can create new test records, such as Customers and Quotes, and edit or delete the test records you created.
- **Displays a Test Mode Warning:** A message appears each time you log in to remind you that Test Mode is enabled and explain its restrictions.



- **Highlights Test Mode on Screens:** The word **(TEST MODE)** appears at the end of each screen title, and the title background turns yellow to help you identify when you are working in Test Mode.



- **Identifies Test Records:** Record number fields for records created in Test Mode have a yellow background. This indicator remains visible even after Test Mode is turned off, making it easier to distinguish test records from regular company records.



- **Applies User Security Settings:** Your assigned user security permissions remain in effect while using Test Mode.
- **Makes Test Records Available for Testing:** Applicable test records appear in relevant dropdown lists and list screens, such as Customer Lists, so you can use them when testing workflows.
- **Excludes Test Data from Reports:** Records created in Test Mode do not appear in reports.

What Happens When Test Mode Is Turned Off?

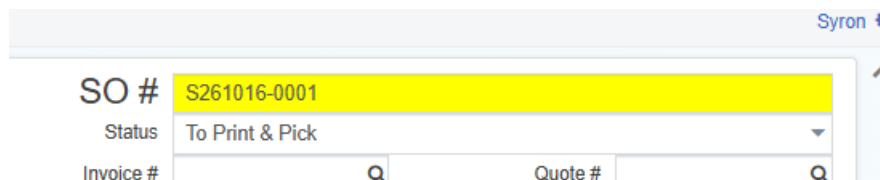
When Test Mode is turned off, 1place returns to normal operation. The following rules apply:

- **Resume Normal Operations:** You can add, edit, and delete regular company records according to your assigned user security permissions.
- **Test Records Are Retained:** Turning off Test Mode does not delete any test records. They remain in 1place until they are deleted individually by the user who created them, removed using the **Delete All Test Data** button on the Test Mode dashboard, or deleted by an administrator through **Settings > Test Mode**.

Enable	User ID	User Name
☐	6133	a TBA
☐	15852	AndrewAPI
☐	231	Cindy
☐	5889	Demo User
☐	6347	Demo User2
☐	234	Demo XYZ User (NEW)
☐	5885	Dennis Shiao
☐	5885	John
☐	278	Julian
☐	409	Lon Stone
☐	5819	Mark Barcinas
☐	9245	Moren
☐	5891	Nazeer Saifi
☐	8941	New User
☐	6390	Nick
☐	190	Nimal
☐	6353	Nivea
☐	8303	Parker Childs
☐	5477	Rachelle
☒	6401	Syron
☐	6385	TamiVM
☒	233	Test 001
☐	5741	Test Test
☐	6447	Test Test Test
☐	5889	Test User
☐	14002	Test Visible
☐	6149	UX/UI Designer
☐	6580	zTestCustom
☐	6581	zTestInherit

[Delete All Test Data](#)

- **Test Records Remain Visible:** Test records continue to appear in applicable dropdown lists and list screens, such as Customer Lists, even when Test Mode is turned off.
- **Test Records Are Shared:** All users can view test records created by other users, regardless of whether Test Mode is enabled or disabled.
- **Test Records Remain Identifiable:** When you open a test record, its Record ID field (such as Customer # or Invoice #) has a yellow background to distinguish it from regular company records.



Syron

SO #	S261016-0001		
Status	To Print & Pick		
Invoice #	Q	Quote #	Q

- **Important:** Turning off Test Mode does not remove test records or prevent them from appearing alongside regular records in applicable screens. Delete test data when it is no longer needed to help keep your company's records organized.

How to Turn Test Mode on and off.

How to Turn Test Mode On

1. Click the **Gear** icon in the top-right corner of 1place.
2. Select **Turn On TEST MODE**.

Test Mode will be enabled for your user account.

How to Turn Test Mode Off

1. Click the **Gear** icon in the top-right corner.
2. Select **Turn Off TEST MODE**.

If you enabled Test Mode yourself, you can also turn it off using the **Turn Off TEST MODE** button on your Dashboard.

Note: If your 1place Administrator enabled Test Mode for you, you cannot turn it off yourself. Only the administrator who enabled it can turn it off. This allows your administrator to manage Test Mode access and monitor user progress on assigned practice scenarios.

How to Enable and Manage Test Mode as an Administrator

A 1place Administrator can enable Test Mode for selected users or all users, either before or after the company goes live.

How to Enable Test Mode for Users

1. Click the **Gear** icon, then go to **Settings > Test Mode**.
2. Select the **Enable** checkbox next to each user who should have access to Test Mode.

Each user retains the security group assigned to them on the **Users** screen.

Note: Enabling Test Mode for users does not automatically assign practice scenarios. Users can access Test Mode without having a list of assigned scenarios on their Dashboard.

How to Assign Practice Scenarios

Administrators can also configure practice scenarios for users through **Gear > Settings > Test Mode**. These scenarios appear on the users' Test Mode Dashboard and guide them through specific tasks in 1place.

Refer to the Test Mode settings to configure the scenarios and assign them to the appropriate users.
