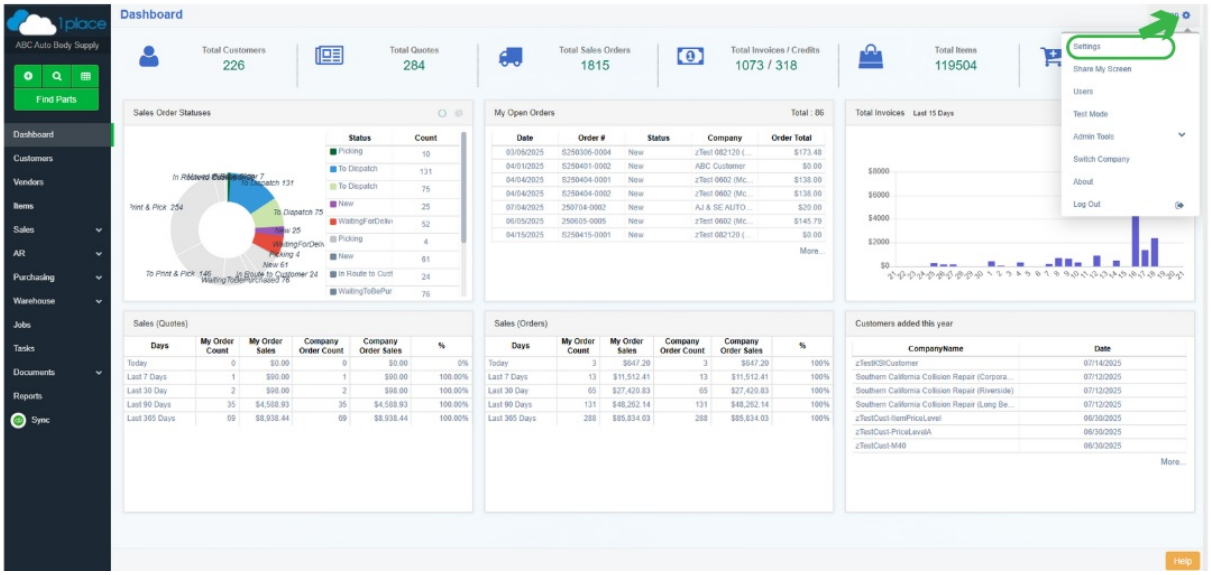
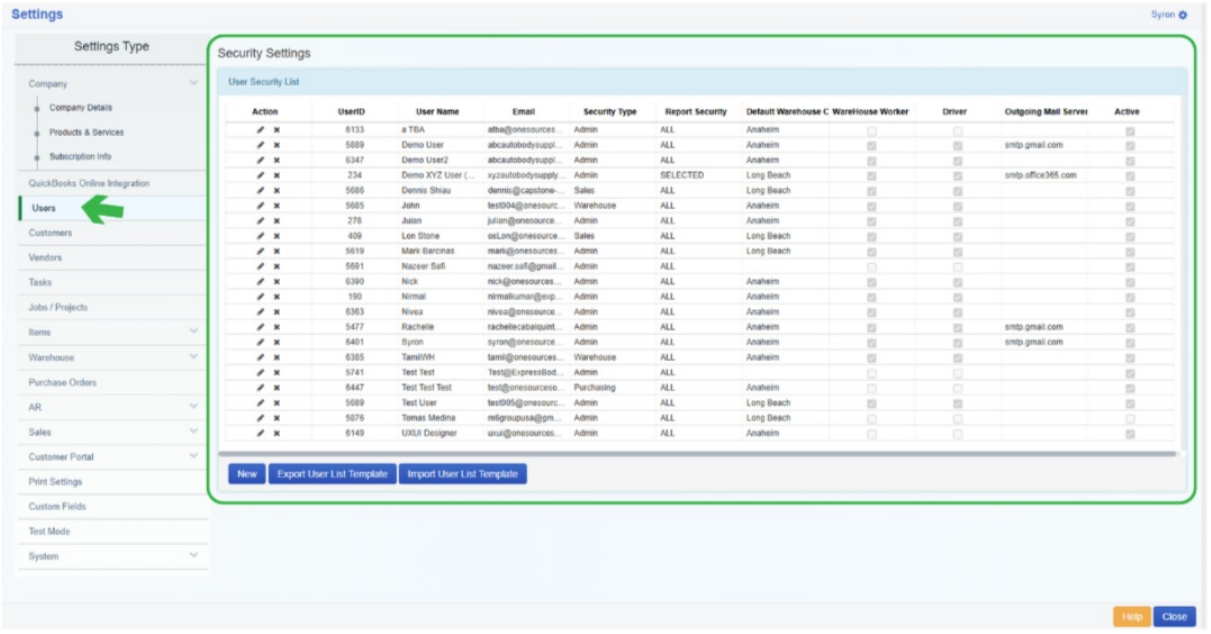
User Security - How To's

Last Modified on 08/25/2026 6:15 pm EDT

To manage **user accounts, permissions, and security settings** in 1place, you'll first need to access the User Settings. Here's how:

1. Click the **gear icon** in the upper-right corner of the 1place dashboard.
2. From the dropdown menu, select **Settings.**
3. In the **Settings Type** panel, click on **User.**
4. The **User Security List** will appear, showing all users, their access levels, and security settings.

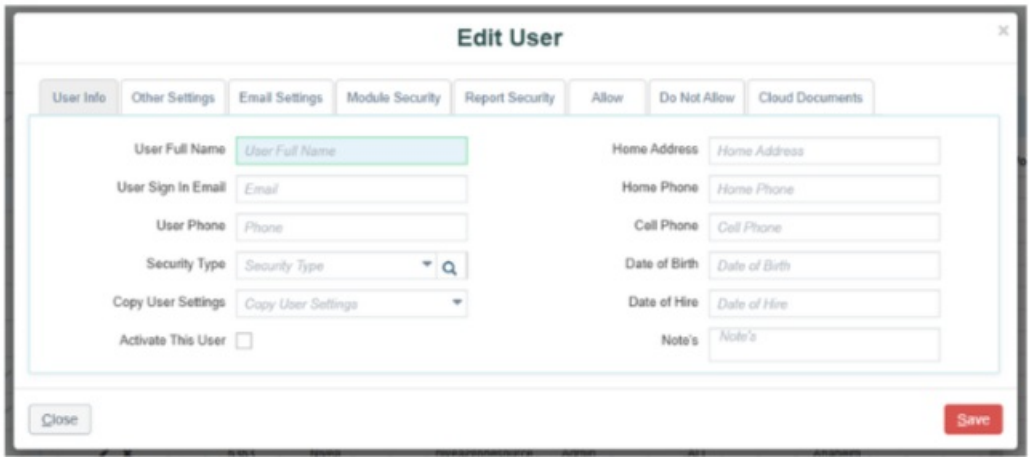




How to Add New Users on 1place

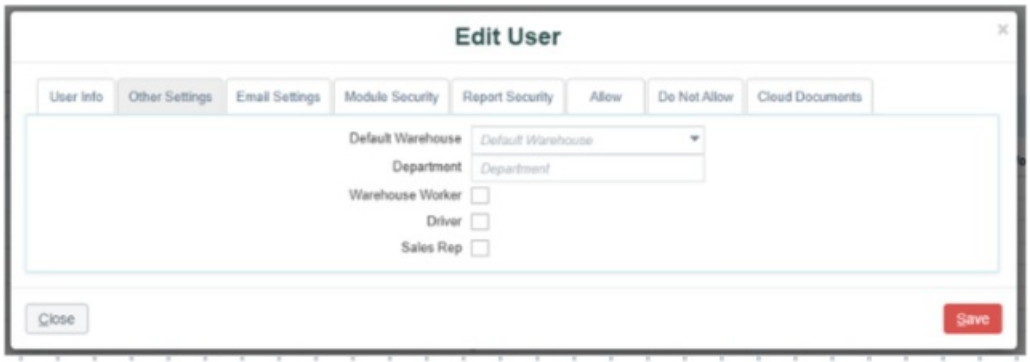
To add a new user and manage their access and security settings, follow these steps:

1. From the **User Security List**, click the **NEW** button to create a new user.
    - License Limit Warning:
        - If you see a popup message saying "**Out of Licenses**", you'll need to either:
            - Remove one or more existing users, or
            - Increase your user license count by clicking Yes on the popup, or by navigating to **Company > Subscription Info**.
2. Fill in User Information:
    - **User Full Name*** — The user's full name.
    - **User Sign-In Email*** — The email address the user will use to log in.
    - **User Phone** — The user's contact phone number.
    - **Security Type*** — Select the user's role (Admin, Accounting, Manager, Purchasing, Sales, Warehouse, Read Only, No Access). (We'll explain these roles in another article.)
    - **Copy User Settings** — (Optional) Copy settings from an existing user.
    - **Home Address** — The user's address.
    - **Home Phone** — Home phone number.
    - **Cell Phone** — Mobile number.
    - **Date of Birth** — The user's birthday.
    - **Date of Hire** — The date the user was hired.
    - **Notes** — Any additional notes about the user.
3. Activate the User (Optional):
    - To allow the user to log in immediately—without waiting for an account confirmation—check **Activate This User**.
    - You'll then be required to set a **Temporary Password** for the user.

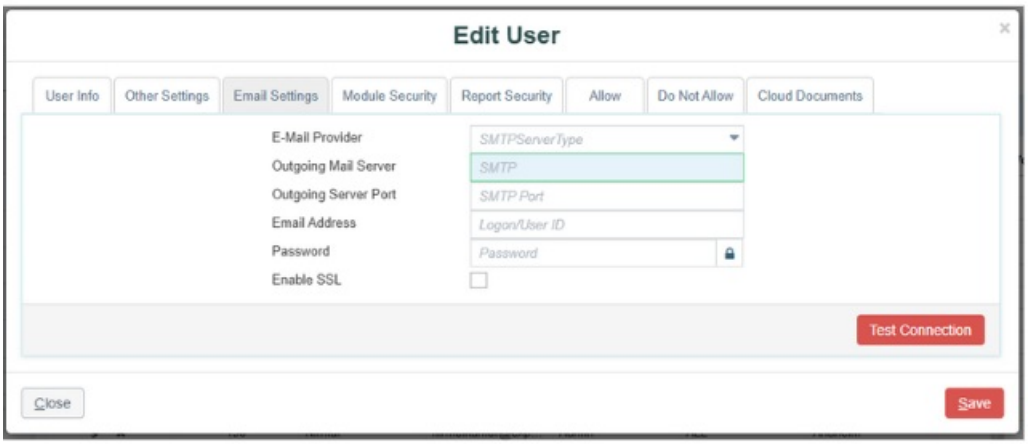


Before saving the new user, it's a good idea to review the user's Security Settings to make sure their access level is correct. See screenshots below with explanation:

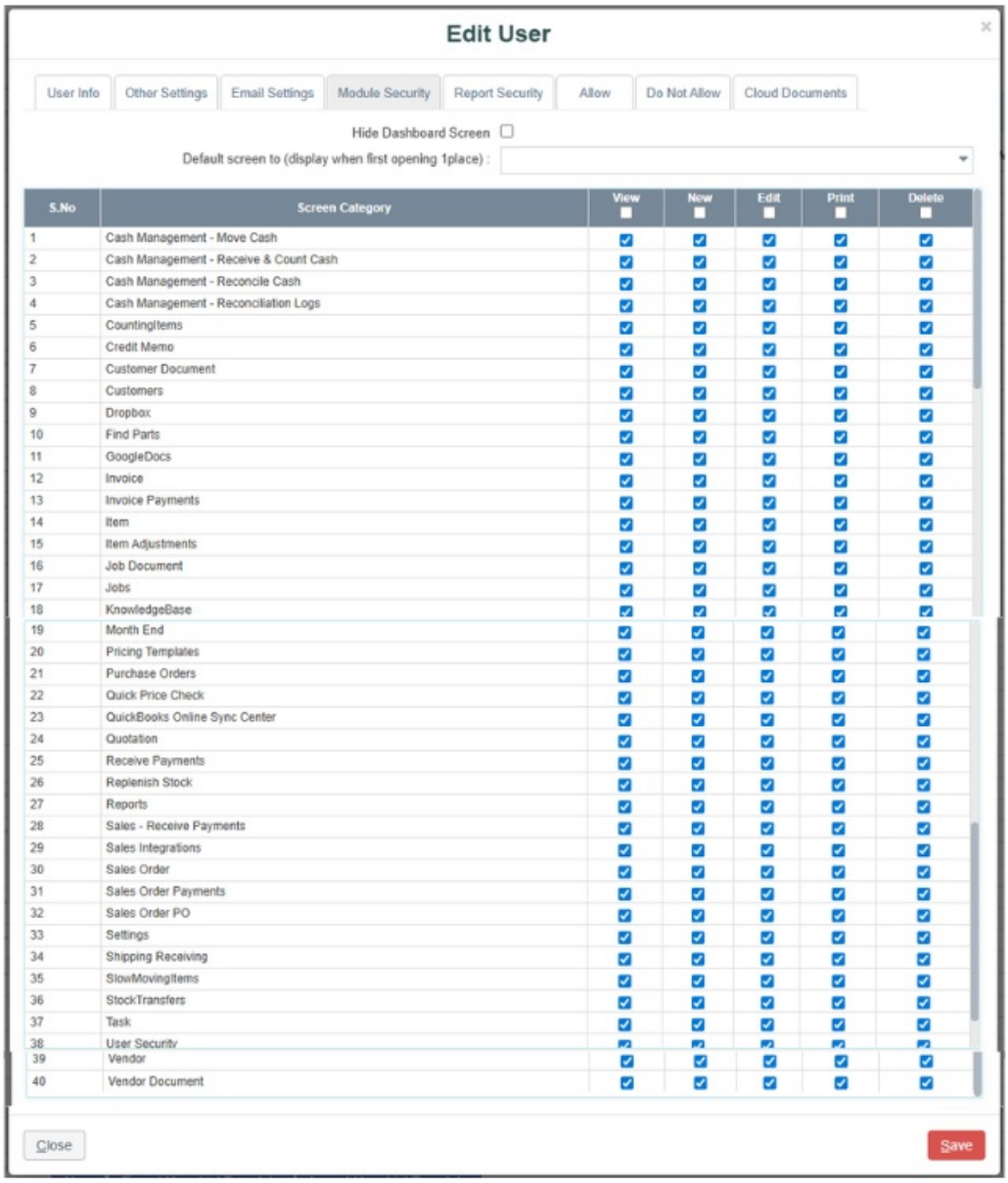
Other Settings — Set the user's **default warehouse** and **department**, and indicate if they are a **warehouse worker**, **driver**, or **sales rep**.



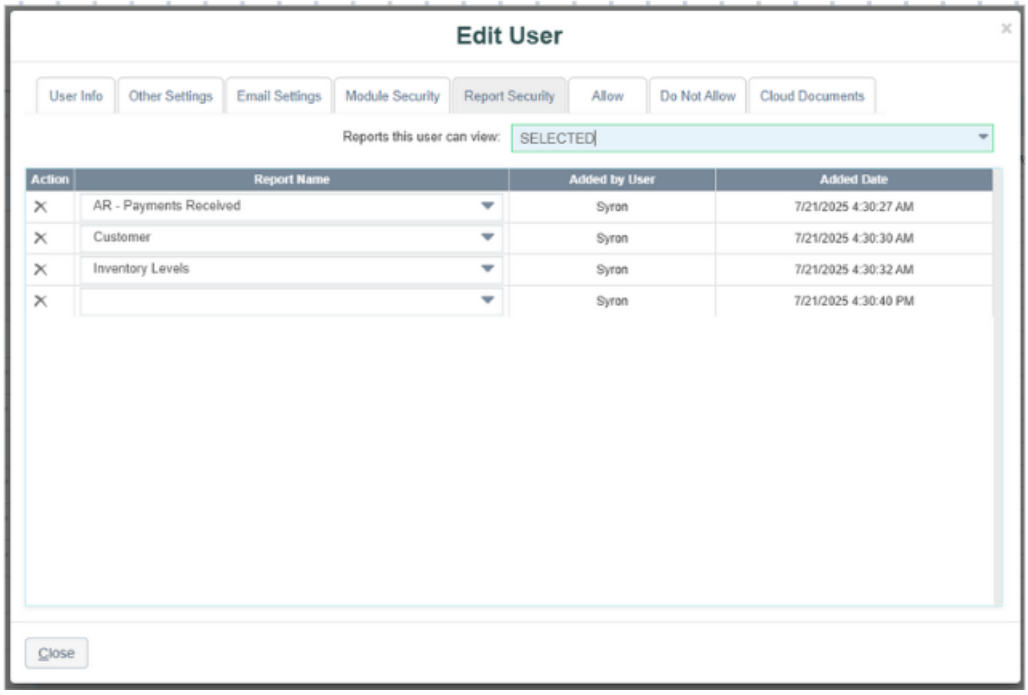
Email Settings — Set up the user's email preferences. To send emails from 1place, the user must complete the **SMTP setup** (see our SMTP Setup article for details).



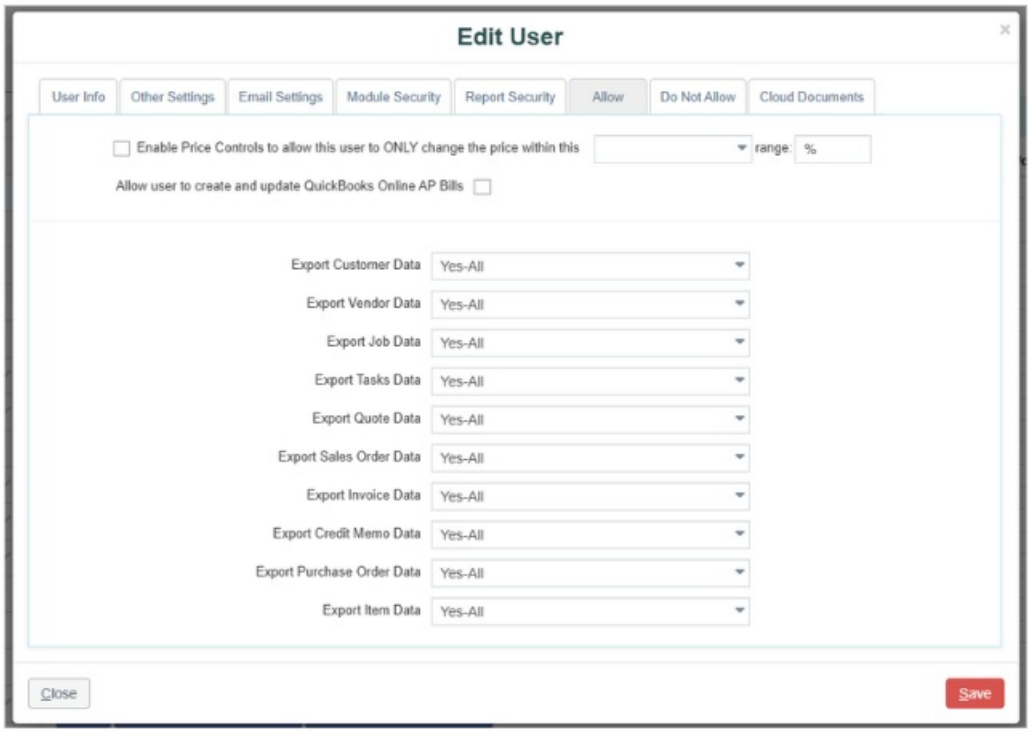
Module Security — Lists all the modules in 1place and lets you customize the user's access, including permissions to **view, create, edit, print, or delete records**.



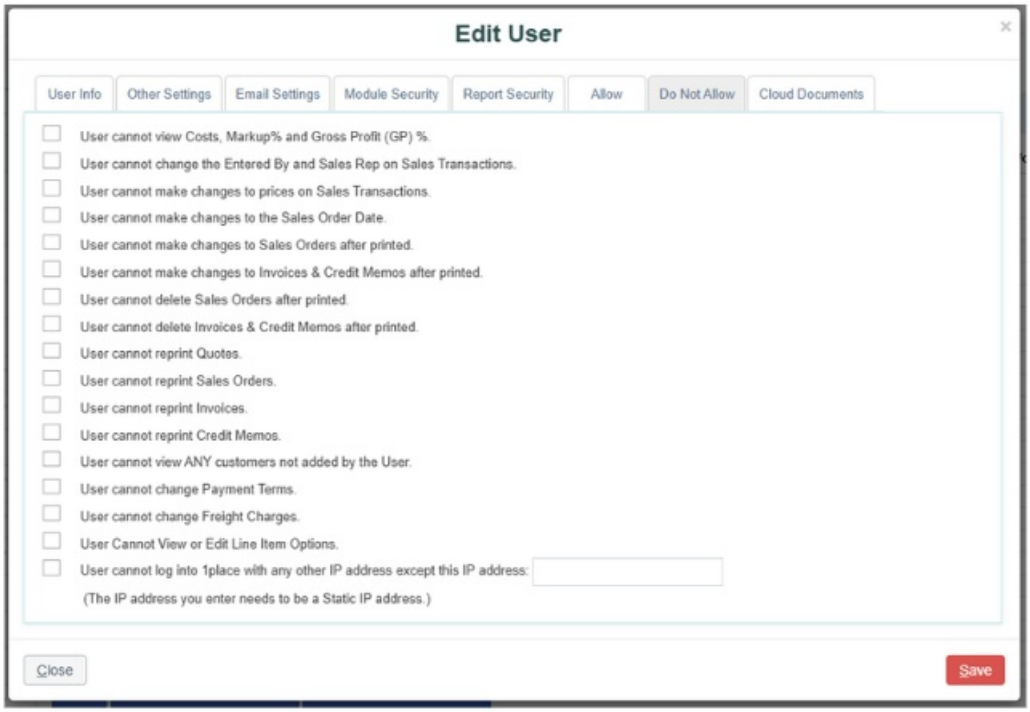
Reports Settings — Control whether the user can view **all reports**, **no reports**, or **only selected reports**.



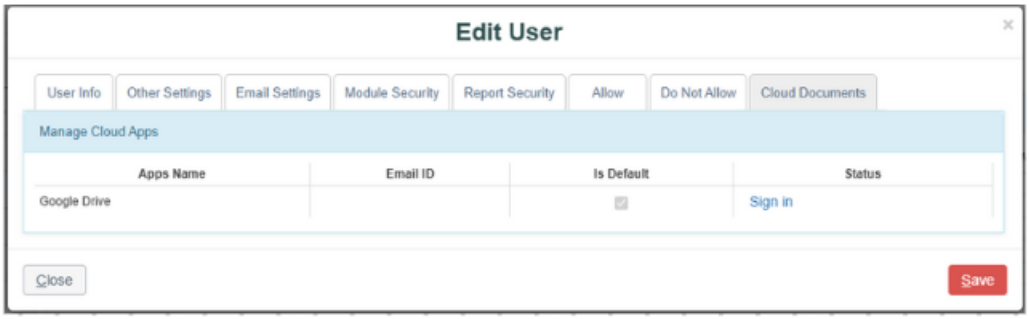
Allow — Manage special permissions like **price control limits**, the ability to **create and update QuickBooks Online AP Bills**, and **export specific data** from the system.



Do Not Allow — Restrict sensitive actions like **viewing costs, editing sales transaction details, reprinting documents, changing payment terms or freight, accessing customers they didn't add, and limit system access by static IP address.**



Cloud Documents — Manage connected **cloud apps** and monitor their **status**.

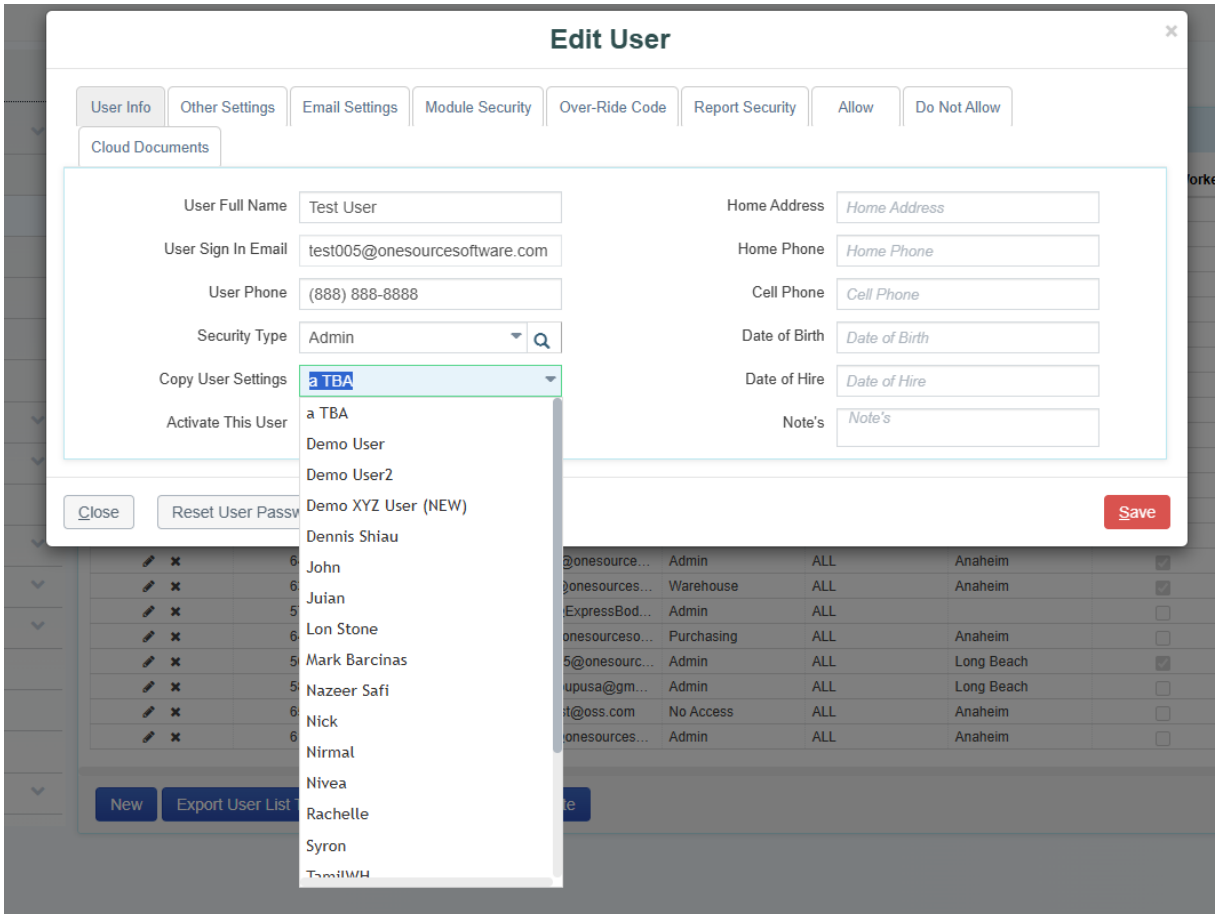


How to Copy an Existing Users Settings?

If you need to duplicate an existing user's settings, 1place makes it easy:

1. In the User Info section, use the Copy User Settings dropdown to select the user whose settings you want to copy.

2. Once selected, all of that user's security and access settings will be applied to the new user or to the user whose access you are updating.



- Click the **GEAR** icon (in the top right corner) and select **Users** (**Gear** > **Settings** > **Users**).
- Then click on the '**pencil**' icon to the left of the user name, under **Action** column.

- Click the **GEAR** icon (in the top right corner) and select **Users** (**Gear** > **Settings** > **Users**).
- Then click on the '**X**' icon to the left of the user name, under **Action** column.

Settings > Users > Pencil icon > User Info (tab)

- **User Full Name** - Enter the complete name of User.
- **User Sign In Email** - Enter the Email address of the User for 1place Account registration.
- **User Phone** - Enter User's phone number.
- **Security Type** - Each **Security Type** defines the **Security Level** for each User in 1place. Click the **magnifying glass** button to show the **Default User Security Groups** popup screen. You can define and **Filter Security Level** for each **Screen Name** and **Screen Category** by checking the boxes (on the right) to enable and allow that User to **View**, add **New**, **Edit**, **Print** or **Delete** records/data.
    - Security Levels:
        - Accounting
        - Admin
        - Manager
        - No Access
        - Purchasing
        - Read Only
        - Sales
        - Warehouse

- **Copy User Settings** - You may copy User settings of another User by selecting on the**drop down** list the name of that User. This is an added field to make setting security filters easier and faster.
- **Activate This User** (checkbox) - checking this box will set the User to '**Active**' status. When a user is first added and this box is clicked, this triggers an automatic email sent to the User's email address for 1place account activation and confirmation.
- **Home Address**
- **Home Phone**
- **Cell Phone**
- **Date of Birth**
- **Date of Hire**
- **Notes**

Settings > Users > Pencil icon > Other Settings (tab)

- **Default Warehouse** - Each User is set to a designated **Default Warehouse**. The **Shipping & Receiving screen** displays (by default) the selected Default Warehouse of the User.
- **Department -** Optional
- **Warehouse Worker** (checkbox) - Check this box if applicable to the User to set some settings properly on various screens.
- **Driver** (checkbox) - Check this box if applicable to the User to set some settings properly on various screens.
- **Sales** (checkbox) - Check this box if applicable to the User to set some settings properly on various screens.
- **Commissionable** (checkbox) - Check this box if applicable to the User to set some settings properly on various screens.

Settings > Users > Pencil icon > Email Settings (tab)

- Email Provider - Select from the dropdown list.
- Outgoing Mail Server - or SMTP (Simple Mail Transfer Protocol)
- Outgoing Server Port
- Email Address
- Password
- Enable SSL
- Test Connection (button)

The User can be allowed to **View**, add **New**, **Edit**, **Print** and **Delete** records on the following **Screen Categories** by checking the boxes corresponding to respective records on the **Edit User** table.

- Commissions
- Counting Items
- Credit Memo
- Customer Document
- Customers
- Dropbox
- GoogleDocs
- Invoice
- Item
- Item Adjustments
- Job Document
- Jobs
- Knowledge Base

- Pricing Templates
- Purchase Orders
- Quickbooks Online Sync Center
- Quotation
- Replemish Stock
- Reports
- Sales Integrations
- Sales Order
- Sales Order PO
- Settings & User Security
- Shipping Receiving
- Slow Moving Items
- Stock Transfers
- Task
- Vendor
- Vendor Document

- Gross Margin Min/Max
- Allow user to create and update Quiclbooks Online AP Bills (checkbox)
- Export Cutomer Data
- Export Vendor Data
- Export Job Data
- Export Tasks Data
- Export Quote Data
- Export Sales Order Data
- Export Invoice Data
- Export Credit Memo Data
- Export Purchase Order Data
- Export Item Data

- User cannot view Costs. (Here is a LIST of the exact locations where restrictions are applied):
    - Item Detail > Dashboard (tab) > Hide Profit Details 'section'.
    - Item Detail > Stock (tab) >Hide Cost, Additional Cost 'columns'.
    - Item Detail > Vendor(tab) >Hide Vendor Cost 'column'.
    - Item Detail > Financial(tab) >Hide Fixed Cost (For Marking up), Additional Cost (For Marking up) 'Fields'.
    - Item Detail > PO(tab) >Hide Cost 'column'.
    - Item Detail > Sales(tab) >Invoice/Credit, Sales Order, Quotation >Hide Cost 'column'.
    - Find Parts >Hide Cost, Markup and GP% 'columns'.
    - Quotation Detail > Quotation Line-Item >Hide Unit Cost, Gross Margin% 'columns'.
    - SO Detail > Sales Order Line-Item >Hide Unit Cost, Gross Margin% 'columns'.
    - Invoice Detail > Invoice Line-Item >Hide Unit Cost, Gross Margin% 'columns'.
    - Credit Memo Detail > Credit Memo Line-Item >Hide Unit Cost 'columns'.
    - Replenish Stock > Hide Last PO Cost 'column'.
    - Item Adjustment > Hide Average Cost 'column'.
    - Purchase Order > Hide PO Cost column, PO Line Total, and PO Total.
- User cannot change the Entered By and Sales Rep on Sales Transactions.
- User cannot make changes to prices on Sales Transactions.
- User cannot make changes to Sales Orders after printed.

- User cannot make changes to Invoices & Credit Memos after printed.
- User cannot delete Sales Orders after printed.
- User cannot delete Invoices & Credit Memos after printed.
- User cannot reprint Quotes.
- User cannot reprint Sales Orders.
- User cannot reprint Invoices.
- User cannot reprint Credit Memos.