User Security - How To's

Last Modified on 08/20/2026 5:14 pm EDT

Overview

User Security allows administrators to manage 1place user accounts and control what each user can access and do within the system.

User Security can be used to:

- Create, edit, and delete user accounts.
- Assign a user's security type.
- Configure user-specific settings, such as their default warehouse and responsibilities.
- Configure email settings for sending email from 1place.
- Control access to modules and the actions a user can perform within those modules.
- Control access to reports.
- Allow or restrict specific functions, such as data exports, pricing changes, transaction changes, and cost visibility.
- Manage connected cloud documents.

User security is configured in several areas. **Module Security** controls whether a user can view, create, edit, print, or delete information in specific areas of 1place. **Report Security** controls which reports the user can access. Additional **Allow** and **Do Not Allow** settings provide more specific control over sensitive actions and information.

When creating or updating a user, review the applicable security settings to make sure the user's access matches their responsibilities.

Help Topics

Accessing User Security

- How to Access User Settings

Managing Users

- How to Add a New User
- How to Copy an Existing User's Settings
- How to Edit an Existing User

Configuring User Information

Managing User Access

Managing Additional Permissions and Restrictions

Cloud Documents

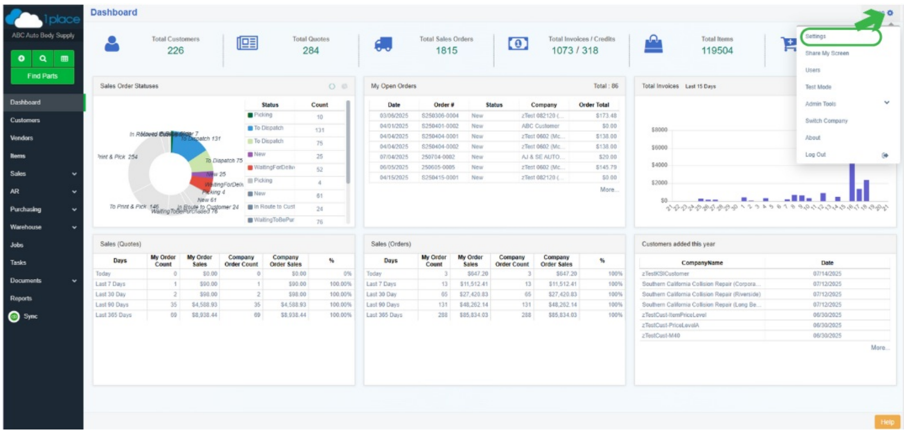
Accessing User Security

How to Access User Settings

User Settings is the main area for managing user accounts, permissions, and security settings in 1place.

To access User Security:

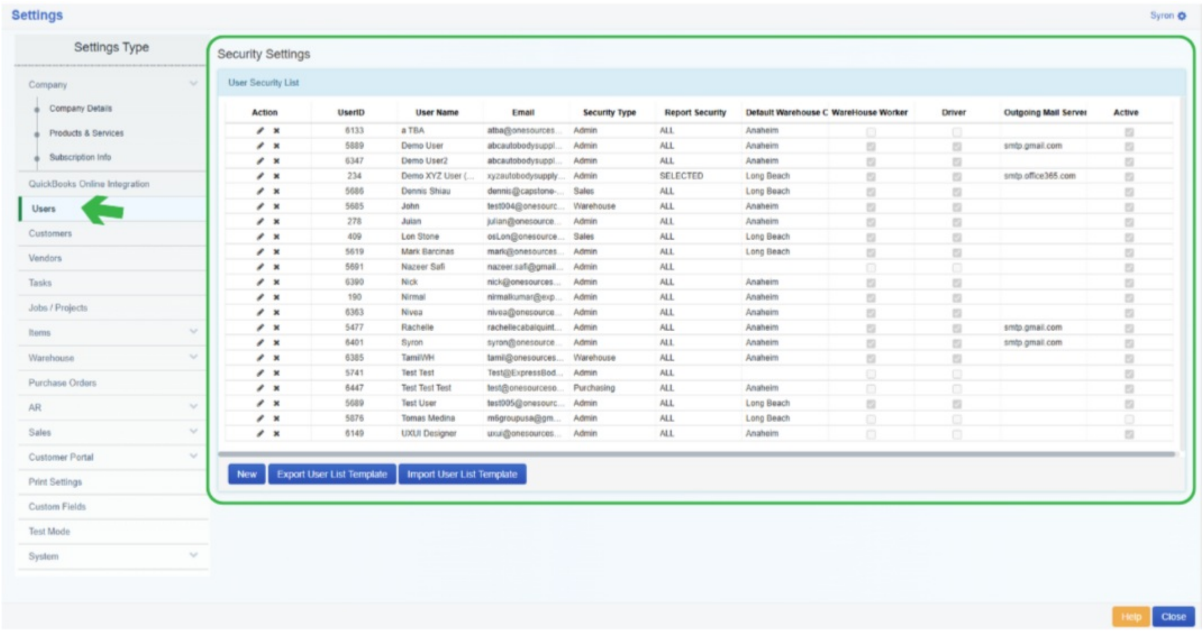
1. Click the **Gear** icon in the upper-right corner of the 1place dashboard.



2. Select **Settings**.

3. In the **Settings Type** panel, select **User**.

4. The **User Security List** will appear.



The User Security List displays the users in the system and provides access to their user information, security settings, and permissions.

Managing Users

User Security provides the tools needed to create new users, update existing users, copy security settings, and permanently remove users when they are no longer needed.

How to Add a New User

Use the **User Security List** to create a new 1place user and configure the user's access.

Create the User

1. From the **User Security List**, click **NEW**.

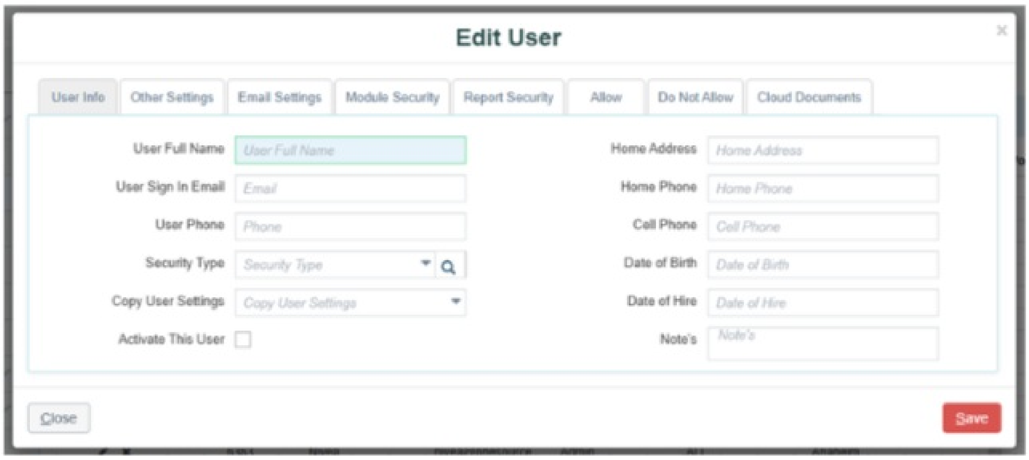
2. Enter the user's information in the **User Info** section.

3. Select the appropriate **Security Type**.

4. If desired, use **Copy User Settings** to copy settings from an existing user.

5. Configure the user's security settings.

6. Review the user's access before saving.



User License Limit

If 1place displays an **"Out of Licenses"** message when creating the user, you can either:

- Remove an existing user to free up a license.
- Click **Yes** on the popup to increase the user license count.
- Go to **Company > Subscription Info** to manage the subscription.

How to Activate a New User

When creating a new user, there are two ways to activate their account.

Allow the User to Activate Their Own Account

If the administrator does not pre-activate the account, the user can complete the account activation and confirmation process themselves.

Pre-Activate the User as an Administrator

If you want the user to be active before they complete the activation process:

1. Check **Activate This User**.

2. Enter a **Temporary Password** when prompted.

3. Complete the remaining user setup.

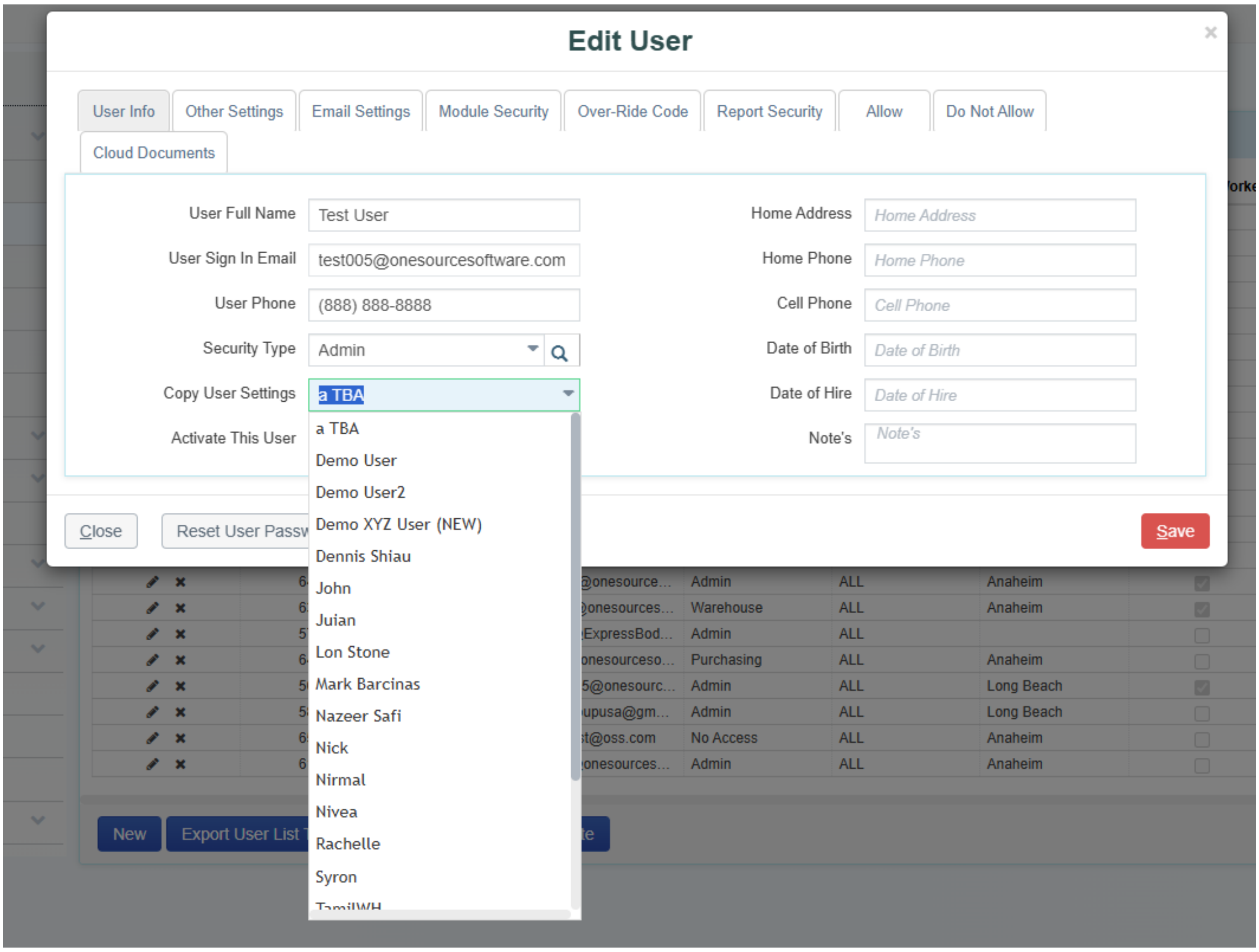
4. Save the user.

This allows the administrator to activate the user's access in advance.

> **Tip:** Before saving a new user, review the user's security settings to make sure they have the appropriate access for their role.

How to Copy an Existing User's Settings

Copy User Settings allows an administrator to use an existing user's configuration as a starting point when setting up another user.



This can save time when multiple users require similar security and access settings.

1. Open the **User Info** section for the user you are creating or updating.

2. Locate **Copy User Settings**.

3. Select the existing user whose settings you want to copy.

4. The selected user's security and access settings will be applied to the user.

5. Review the copied settings and make any necessary changes.

6. Save the user.

> **Note:** Copying settings is intended to make security setup faster. Always review the copied settings before saving because the new user may require different access.

How to Edit an Existing User

Use the User Security List when you need to change a user's information, security settings, permissions, or other user-specific settings.

1. Click the **Gear** icon in the upper-right corner.
2. Select **Settings**.
3. Select **User**.
4. Locate the user you want to update.
5. Click the **Pencil** icon in the **Action** column.
6. Update the user's settings as needed.
7. Save the changes.

How to Delete an Existing User

Deleting a user permanently removes the user from 1place.

1. Click the **Gear** icon in the upper-right corner.
2. Select **Settings**.
3. Select **User**.
4. Locate the user you want to delete.
5. Click the **X** icon in the **Action** column.
6. A confirmation message will appear:

   Are you sure?
   This will permanently delete your user.
7. Confirm the deletion if you are sure the user should be permanently removed.

> **Important:** Deleting a user is permanent.

Configuring User Information

The **User Info** section contains the basic information associated with a user's 1place account, along with the user's security type and account activation settings.

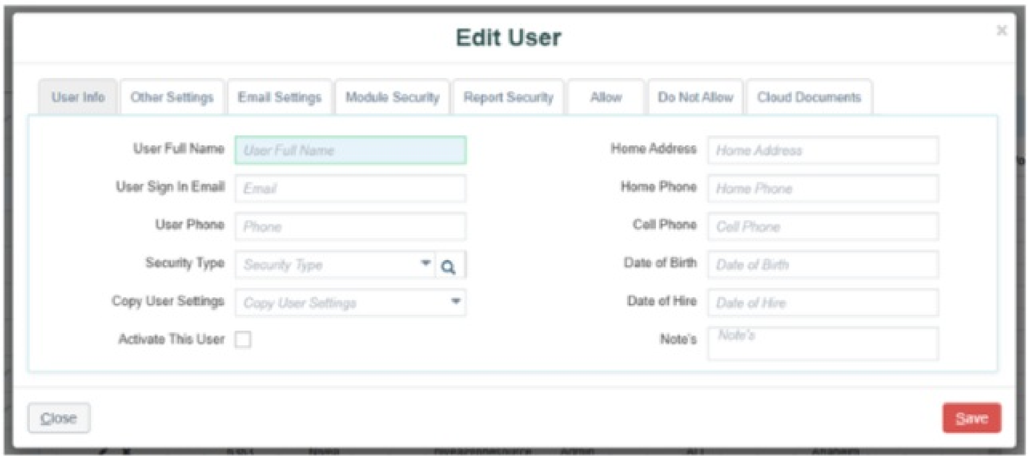
How to Define User Information

Go to:

Settings > User > Pencil icon > User Info

The available fields include:

- **User Full Name** - Enter the user's complete name.
- **User Sign-In Email** - Enter the email address the user will use for their 1place account.
- **User Phone** - Enter the user's phone number.
- **Security Type** - Select the user's security type.
- **Copy User Settings** - Select an existing user if you want to copy that user's security settings.
- **Activate This User** - Allows the administrator to pre-activate the user's account.
- **Home Address** - Enter the user's home address.
- **Home Phone** - Enter the user's home phone number.
- **Cell Phone** - Enter the user's mobile number.
- **Date of Birth** - Enter the user's date of birth.
- **Date of Hire** - Enter the user's hire date.
- **Notes** - Enter any additional information about the user.



Security Type

The **Security Type** determines the user's default security level in 1place.

Available Security Types include:

- Admin
- Accounting
- Manager
- No Access
- Purchasing
- Read Only
- Sales
- Warehouse

The user's access can then be further controlled through the available security and permission settings.

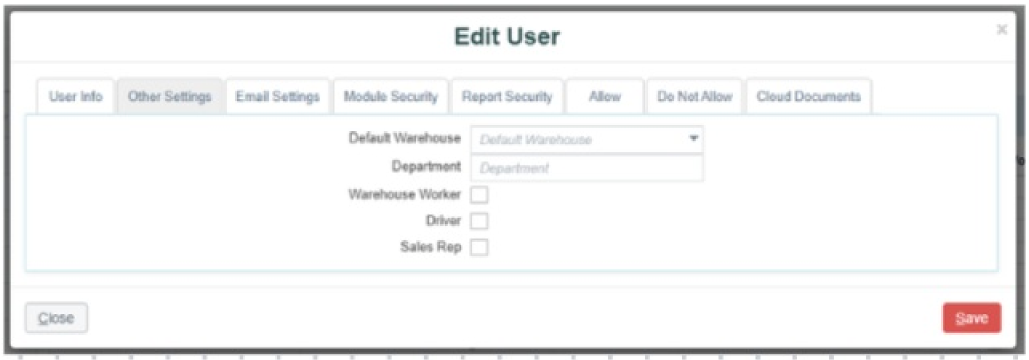
Configuring User Defaults and Responsibilities

The **Other Settings** tab contains user-specific defaults and settings that identify certain responsibilities associated with the user.

How to Configure Other User Settings

Go to:

Settings > User > Pencil icon > Other Settings



The available settings include:

- **Default Warehouse** - Assigns the user's designated default warehouse. The Shipping & Receiving screen displays this warehouse by default for the user.

- **Department** - Assigns the user to a department.

- **Warehouse Worker** - Identifies the user as a warehouse worker and allows 1place to apply applicable warehouse-related settings.

- **Driver** - Identifies the user as a driver.

- **Sales** - Identifies the user as a sales user.

- **Commissionable** - Identifies the user as commissionable.

Configure these settings according to the user's responsibilities and how they will use 1place.

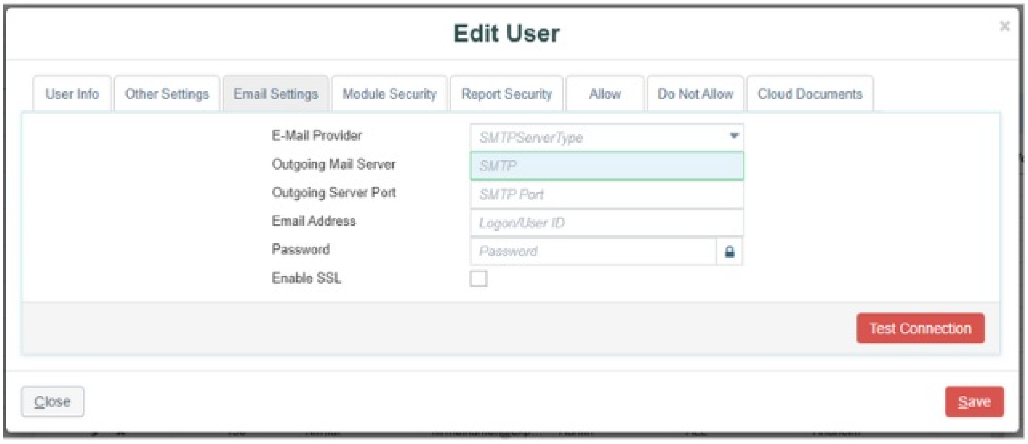
Configuring Email

The **Email Settings** tab contains the information 1place uses when sending email from the user's account.

How to Configure Email Settings

Go to:

Settings > User > Pencil icon > Email Settings



The available fields include:

- **Email Provider** - Select the appropriate email provider.

- **Outgoing Mail Server** - Enter the outgoing mail server/SMTP server.

- **Outgoing Server Port** - Enter the outgoing server port.

- **Email Address** - Enter the email address used for outgoing mail.

- **Password** - Enter the email account password.
- **Enable SSL** - Enable SSL when required by the email provider.
- **Test Connection** - Test the email connection.

Use **Test Connection** to verify the email configuration.

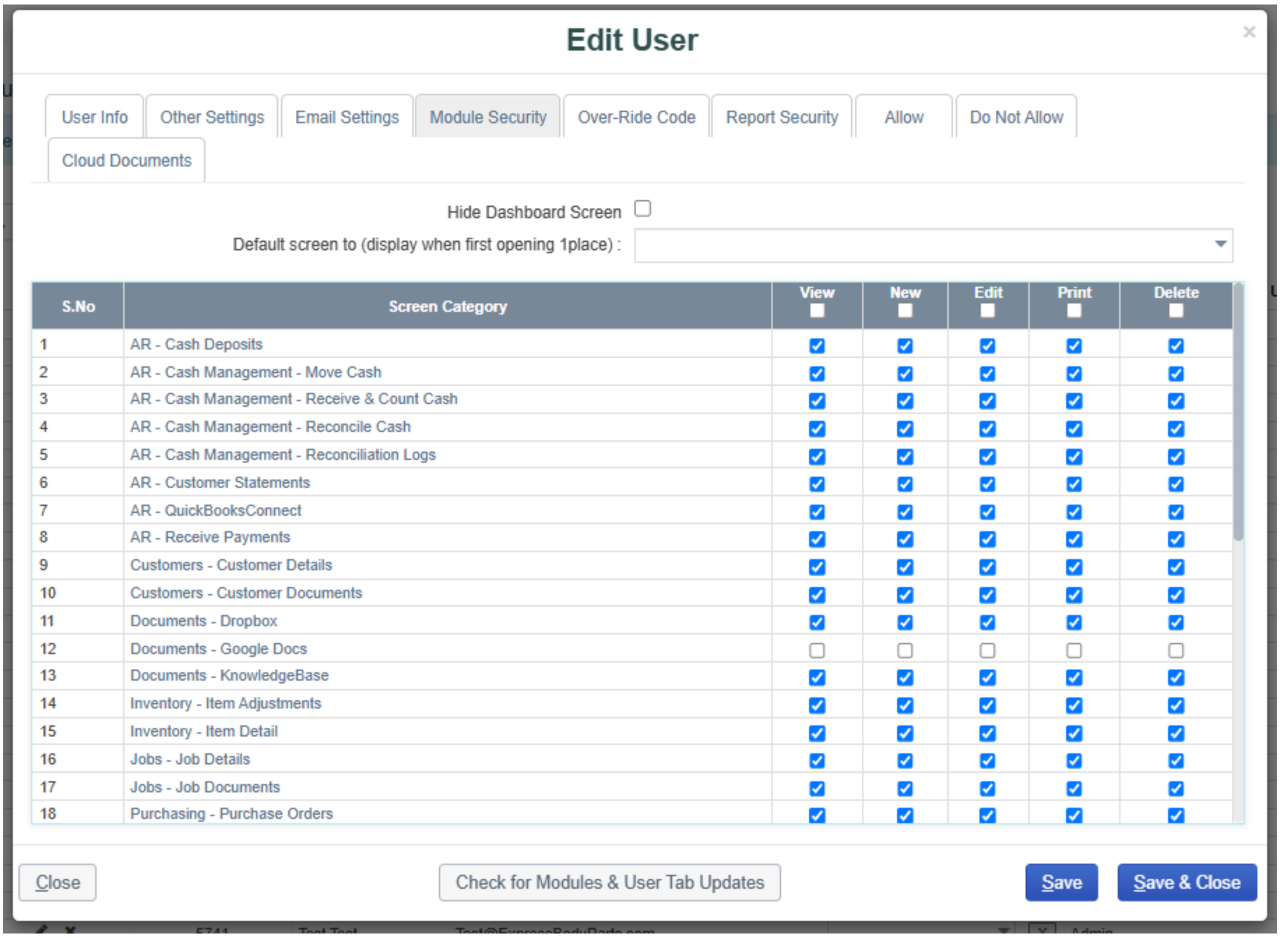
> **Note:** The user's SMTP setup must be completed correctly in order to send emails from 1place. Refer to the **SMTP Setup** article for additional information.

Managing User Access

User access is controlled through several security areas. Module Security determines what a user can do within specific screens, while Report Security determines which reports the user can access.

How to Set Up Module Security

Module Security controls the user's access to different areas of 1place and determines which actions they can perform.



The available permissions are:

- **View** - Allows the user to view records or information

- **View** - Allows the user to view records or information.
- **New** - Allows the user to create new records.
- **Edit** - Allows the user to modify existing records.
- **Print** - Allows the user to print records or documents.
- **Delete** - Allows the user to delete records.

To configure Module Security:

1. Open the user's settings.
2. Go to the **Module Security** section.
3. Locate the appropriate screen or module.
4. Select the permissions the user should have.
5. Review the settings before saving the user.

Module Security can be configured for areas including:

-
- AR - Cash Deposits
- AR - Cash Management - Move Cash
- AR - Cash Management - Receive & Count Cash
- AR - Cash Management - Reconcile Cash
- AR - Cash Management - Reconciliation Logs
- AR - Customer Statements
- AR - QuickBooksConnect
- AR - Receive Payments
- Customers - Customer Details
- Customers - Customer Documents
- Documents - Dropbox
- Documents - Google Docs
- Documents - KnowledgeBase
- Inventory - Item Adjustments
- Inventory - Item Detail
- Jobs - Job Details
- Jobs - Job Documents
- Purchasing - Purchase Orders
- Purchasing - Replenish Stock
- Purchasing - Sales Order PO's
- Reports
- Sales - Credit Memos
- Sales - Find Parts
- Sales - Integrations

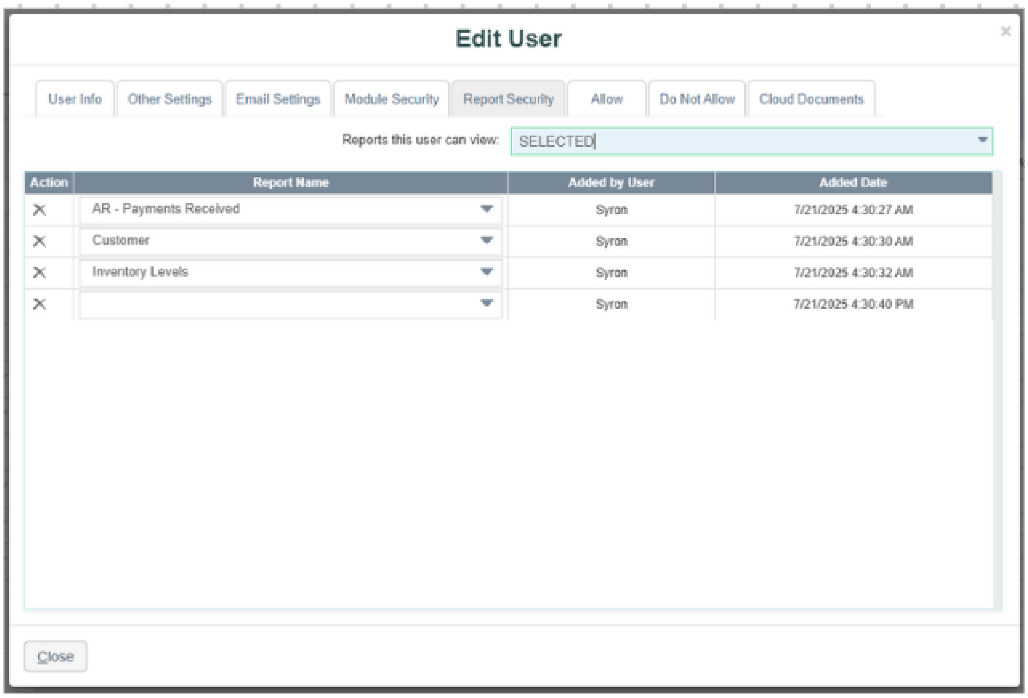
- Sales - Invoice Payments
- Sales - Invoices
- Sales - Pricing Templates
- Sales - Quotations
- Sales - Sales Orders
- Sales - Sales Orders Payments
- Support Tickets
- System - Settings
- System - User Security
- Tasks
- Vendors
- Vendors Documents
- Warehouse - Bin Management
- Warehouse - Shipping & Receiving
- Warehouse - Stock Transfers

Use these permissions to provide users with the access required for their responsibilities without giving them unnecessary access to other areas of the system.

How to Configure Report Security

Report Security controls which reports a user can access.

The Reports Settings provide options for allowing access to all reports, no reports, or only selected reports.



To allow access to selected reports:

1. Open the user's settings.

2. Go to **Reports Settings**.

3. Select **Selected Reports**.

4. A report selection table will appear.

5. Use the report dropdowns to select the reports the user should be able to access.

6. Review the selected reports.

7. Save the user's settings.

This allows administrators to give a user access only to the reports they need.

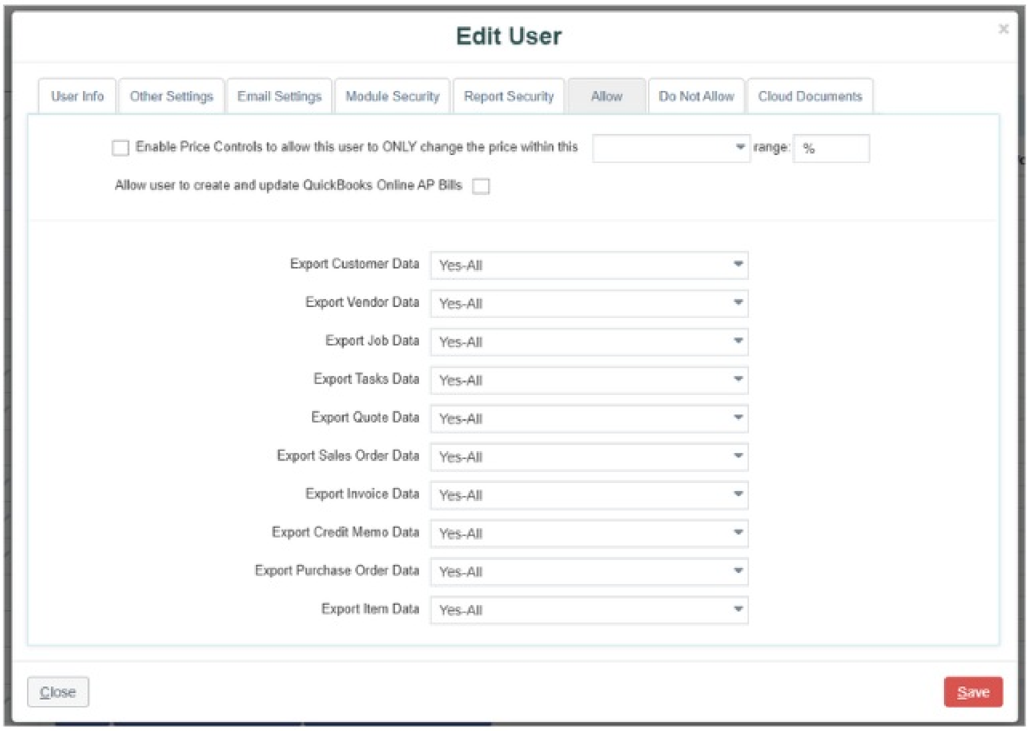
Managing Additional Permissions and Restrictions

In addition to Module Security and Report Security, 1place provides **Allow** and **Do Not Allow** settings for more specific control over user actions and information.

These settings are useful when a user needs access to a particular area of 1place but should have additional restrictions on specific functions within that area.

How to Configure Additional User Permissions

The **Allow** settings provide additional permissions that can be enabled for a user.



Available options include:

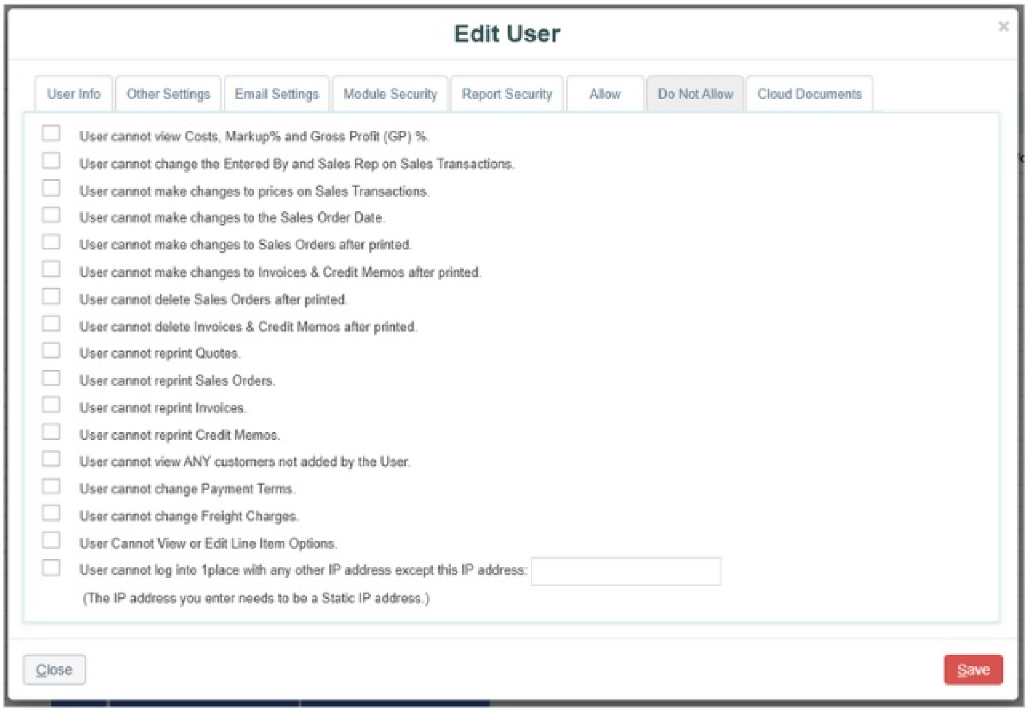
- **Gross Margin Min/Max**
  - Controls the user's minimum and maximum gross margin settings.
- **Allow User to Create and Update QuickBooks Online AP Bills**
  - Allows the user to create and update QuickBooks Online AP Bills.
- **Export Customer Data**
  - Allows the user to export customer data.
- **Export Vendor Data**
  - Allows the user to export vendor data.
- **Export Job Data**
  - Allows the user to export job data.
- **Export Tasks Data**
  - Allows the user to export task data.
- **Export Quote Data**
  - Allows the user to export quote data.
- **Export Sales Order Data**
  - Allows the user to export sales order data.
- **Export Invoice Data**
  - Allows the user to export invoice data.

- **Export Credit Memo Data**
    - Allows the user to export credit memo data.
- **Export Purchase Order Data**
    - Allows the user to export purchase order data.
- **Export Item Data**
    - Allows the user to export item data.

Enable only the additional permissions the user needs to perform their responsibilities.

How to Restrict What a User Can Do

The **Do Not Allow** settings provide additional restrictions for sensitive actions in 1place.



These restrictions can be used when a user needs access to a screen or module but should not be allowed to perform certain actions.

Restrict Changes to Entered By and Sales Rep

User cannot change the Entered By and Sales Rep on Sales Transactions

Prevents the user from changing the **Entered By** or **Sales Rep** associated with sales transactions.

This helps maintain the original transaction attribution.

Restrict Price Changes

User cannot make changes to prices on Sales Transactions

Prevents the user from changing prices on sales transactions.

This is useful when users should be able to process sales transactions but should not be able to override pricing.

Restrict Changes to Printed Sales Orders

User cannot make changes to Sales Orders after printed

Prevents the user from editing a Sales Order after it has been printed.

Restrict Changes to Printed Invoices and Credit Memos

User cannot make changes to Invoices & Credit Memos after printed

Prevents the user from editing an Invoice or Credit Memo after it has been printed.

Restrict Deletion of Printed Sales Orders

User cannot delete Sales Orders after printed

Prevents the user from deleting a Sales Order after it has been printed.

Restrict Deletion of Printed Invoices and Credit Memos

User cannot delete Invoices & Credit Memos after printed

Prevents the user from deleting an Invoice or Credit Memo after it has been printed.

Restrict Reprinting of Quotes

User cannot reprint Quotes

Prevents the user from reprinting Quotes.

Restrict Reprinting of Sales Orders

User cannot reprint Sales Orders

Prevents the user from reprinting Sales Orders.

Restrict Reprinting of Invoices

User cannot reprint Invoices

Prevents the user from reprinting Invoices.

Restrict Reprinting of Credit Memos

User cannot reprint Credit Memos

Prevents the user from reprinting Credit Memos.

How to Restrict User Access to Cost Information

The **User Cannot View Costs** setting prevents a user from viewing internal cost and margin-related information in various areas of 1place.

This restriction is useful when a user needs to work with inventory, purchasing, sales, or other areas of the system but should not have access to internal cost or profitability information.

When this restriction is enabled, cost-related information is hidden from the following areas:

- **Item Detail > Dashboard** - Hides the **Profit Details** section.
- **Item Detail > Stock** - Hides the **Cost** and **Additional Cost** columns.
- **Item Detail > Vendor** - Hides the **Vendor Cost** column.
- **Item Detail > Financial** - Hides the **Fixed Cost (For Marking up)** and **Additional Cost (For Marking up)** fields.
- **Item Detail > PO** - Hides the **Cost** column.
- **Item Detail > Sales** - Hides the **Cost** column for Invoices/Credits, Sales Orders, and Quotations.
- **Find Parts** - Hides the **Cost**, **Markup**, and **GP%** columns.
- **Quotation Detail > Quotation Line-Item** - Hides the **Unit Cost** and **Gross Margin %** columns.
- **Sales Order Detail > Sales Order Line-Item** - Hides the **Unit Cost** and **Gross Margin %** columns.
- **Invoice Detail > Invoice Line-Item** - Hides the **Unit Cost** and **Gross Margin %** columns.
- **Credit Memo Detail > Credit Memo Line-Item** - Hides the **Unit Cost** column.
- **Replenish Stock** - Hides the **Last PO Cost** column.
- **Item Adjustment** - Hides the **Average Cost** column.
- **Purchase Order** - Hides the **PO Cost**, **PO Line Total**, and **PO Total**.

Cloud Documents

Cloud Documents allows administrators to manage connected cloud document applications associated with the user and monitor their connection status.

How to Link Cloud Documents

1. Open the user's settings.

2. Go to the **Cloud Documents** section.

3. Review the available cloud document connections.

4. Use the available options to configure or manage the appropriate connection.

The available settings and connection information are displayed within the Cloud Documents section.

> **Note:** The available options may vary depending on the cloud application being connected. Refer to the available fields and controls shown on the screen when configuring the connection.