

Automated Jobs (Auto Jobs) - How To's

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Overview

Automated Jobs (Auto Jobs) allows administrators to schedule predefined system processes to run automatically in 1place. Instead of manually performing certain recurring tasks, an administrator can configure an automated job and specify when it should run.

Automated Jobs can be used for processes such as:

- **Integrations** - Run scheduled integration-related processes.
- **Invoicing** - Automatically process certain invoice-related tasks.
- **Inventory** - Run scheduled inventory processes.
- **Quotes** - Perform scheduled quote-related tasks.
- **System Maintenance** - Run certain system maintenance processes automatically.

When setting up an Automated Job, administrators can:

- Select the **Job Name** for the process they want to automate.
- Enable or disable the automated job.
- Configure the settings specific to the selected job.
- Select a **Recurrence Pattern**.
- Schedule the job to run **Daily, Weekly, or Monthly**.

The available jobs and their specific functions may vary. This article explains how to access and configure Automated Jobs, along with instructions for the individual automated processes available in 1place.

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Configuring Specific Automated Jobs

- Job-specific How To's will be added as each automated process is documented.

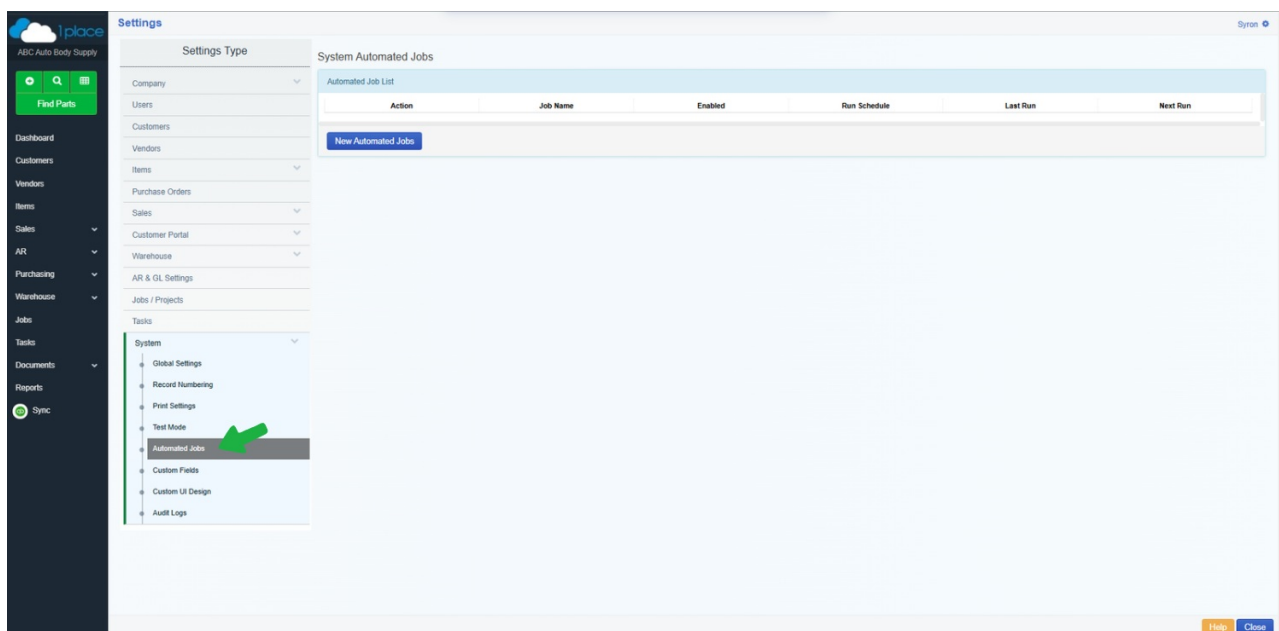
Accessing Automated Jobs

How to Access Automated Jobs

Automated Jobs can be accessed through the **System** settings in 1place.

To open Automated Jobs:

1. Click the **Gear** icon in the upper-right corner.
2. Select **Settings**.
3. Under the Settings options, select **System**.
4. Select **Automated Jobs**.



The **Automated Jobs** screen displays the automated jobs available in 1place and allows administrators to create and manage scheduled processes.

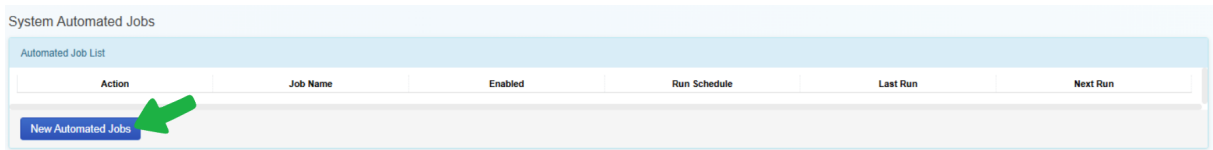
Managing Automated Jobs

Automated Jobs can be configured to run a specific system process automatically based on a schedule.

How to Create a New Automated Job

To create a new Automated Job:

1. From the **Automated Jobs** screen, click **New Automated Jobs**.



2. The **New Automated Jobs** window will appear.

A screenshot of the 'New Automated Jobs' window. The window has a title bar with 'New Automated Jobs' and a close button. Inside, there are several fields: 'Is Enabled' with a checkbox, 'Job Name' with a dropdown menu showing 'Invoices - Send Invoices Created Today', 'Retry # of Days' with a text input showing '0', 'Email Template Name' with a dropdown menu, and 'Description' with a text area containing a description. Below these is a section for 'Recurrence Pattern*' with three radio buttons: 'Daily', 'Weekly', and 'Monthly'. At the bottom left is a 'Cron: -' field. At the bottom right are 'Close' and 'Save' buttons.

3. Check **Is Enabled** if the job should be active after it is saved.
4. Select the appropriate process from the **Job Name** dropdown.
5. Review the fields that appear below **Job Name**.

The fields displayed may vary depending on the selected job. Each automated job can have its own settings and requirements. The job-specific fields and their functions are explained in the individual How To section for that automated job.

6. Configure the **Recurrence Pattern** to determine when the job should run:

- **Daily**
- **Weekly**
- **Monthly**

7. Review the schedule displayed under **Cron**.

8. Click **Save** to create the Automated Job.

Note: The fields and options displayed after selecting a **Job Name** are specific to that automated process. Refer to the corresponding job-specific How To section for instructions on configuring those fields.

How to Modify or Edit an Automated Job

Existing Automated Jobs can be updated when you need to change their settings, schedule, or other job-specific information.

To edit an Automated Job:

1. From the **Automated Job List**, locate the automated job you want to modify.

System Automated Jobs

Automated Job List					
Action	Job Name	Enabled	Run Schedule	Last Run	Next Run
 	Quotes - Delete Quotes	☒	At 11:00 PM		8/23/2025 11:00:00 PM

[New Automated Jobs](#)

2. Under the **Action** column, click the **Pencil** icon.
3. The Automated Job screen will appear.
4. Modify the fields as needed.
5. Click **Save** to save the changes.

Note: The fields available for editing may vary depending on the selected automated job.

How to Delete an Automated Job

If an Automated Job is no longer needed, it can be deleted from the Automated Job List.

To delete an Automated Job:

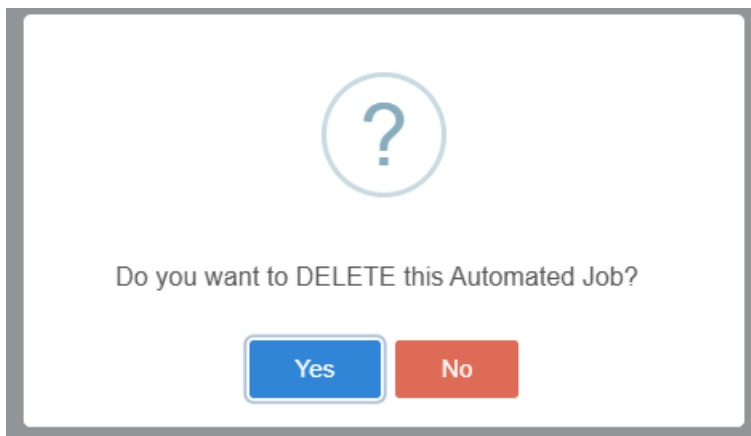
1. From the **Automated Job List**, locate the automated job you want to delete.
2. Under the **Action** column, click the **X** button.

System Automated Jobs

Automated Job List					
Action	Job Name	Enabled	Run Schedule	Last Run	Next Run
 	Quotes - Delete Quotes	☒	At 11:00 PM		8/22/2026 11:00:00 PM

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3. A confirmation message will appear:



4. Click **Yes** to proceed with the deletion.