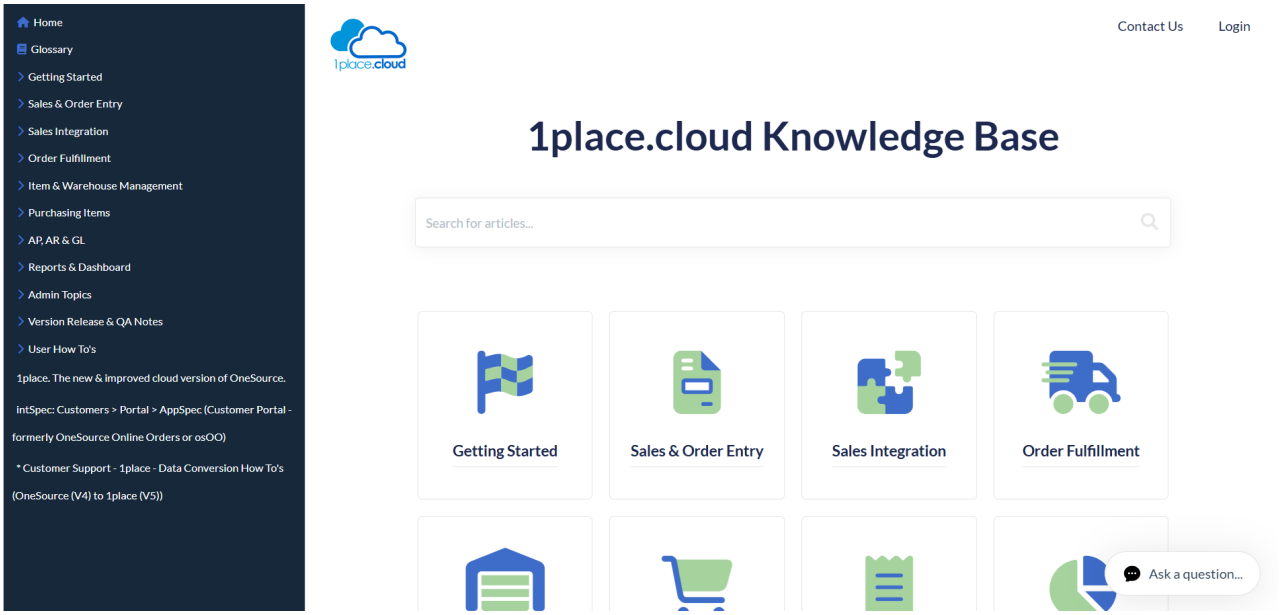
Knowledge Base - How To's

Last Modified on 10/19/2026 5:20 pm EDT

Overview

The **1place.cloud Knowledge Base** provides a central location for finding information about 1place, including how-to instructions, feature documentation, integrations, release information, and other helpful resources.

You can use the Knowledge Base to search for a specific topic, browse articles by category, or discover recently added and updated content.

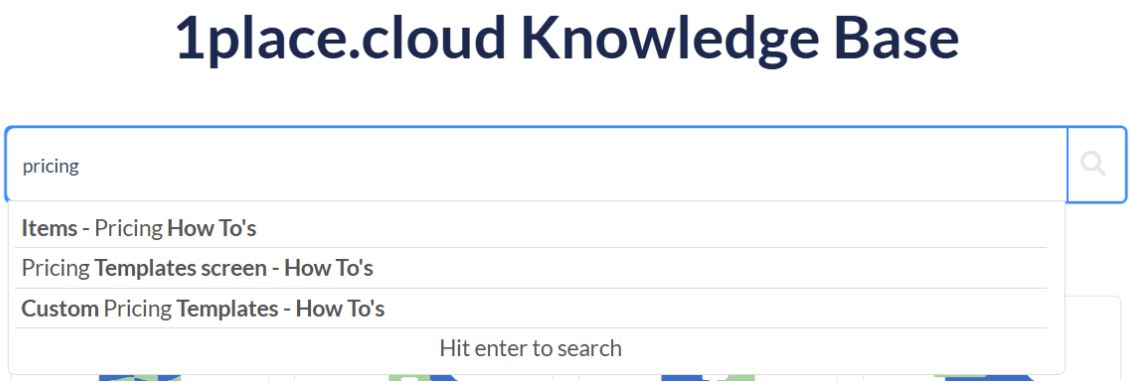


Help Topics

How to Search for an Article

The Knowledge Base search allows you to quickly find articles related to a specific feature, screen, task, or question.

1. Enter a keyword or phrase in the **Search for articles...** field.

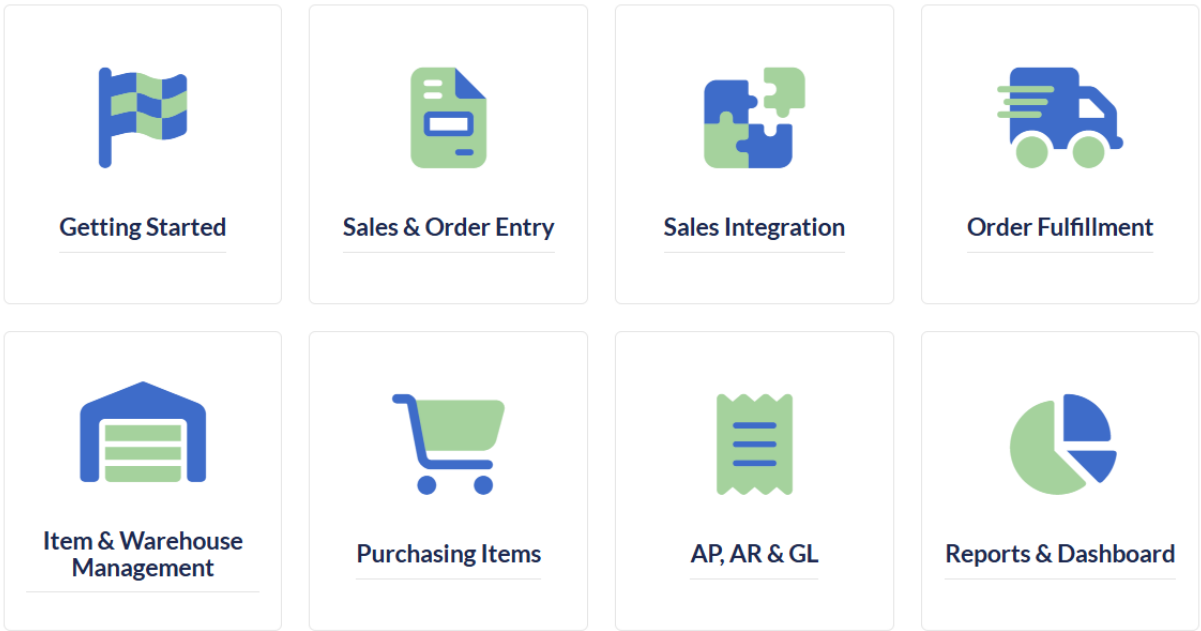


2. Select the **Search** icon.
3. Review the search results.
4. Select an article to view its instructions and related information.

Tip: Use specific terms that relate to the feature or task you are looking for. For example, search for **Sales Order**, **Customer Portal**, **Item Labels**, or **Credit Memo**.

How to Browse Knowledge Base Categories

The Knowledge Base organizes articles into categories based on the area of 1place they cover.



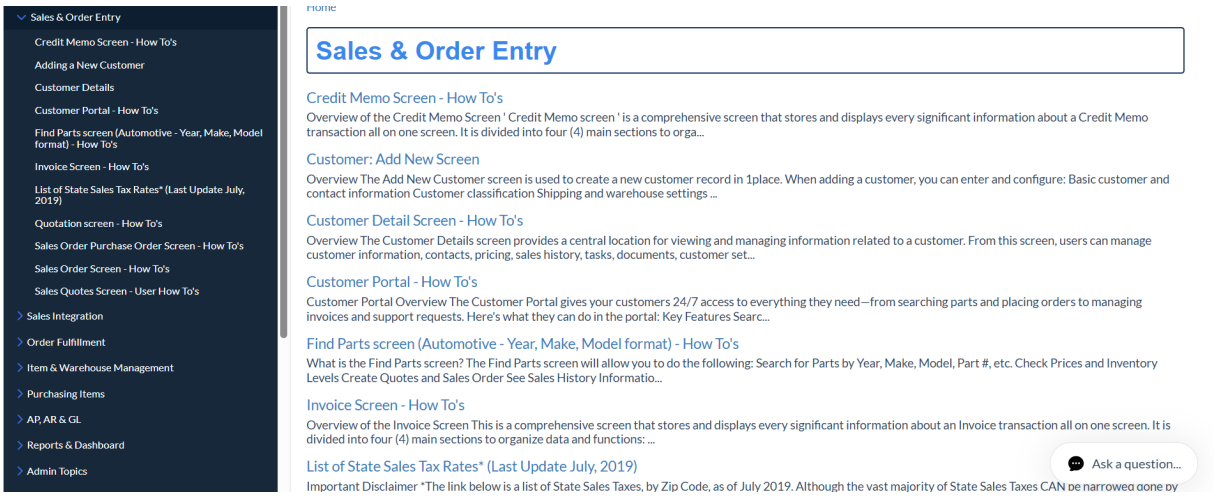
Available categories include:

- **Getting Started**
- **Sales & Order Entry**
- **Sales Integration**
- **Order Fulfillment**
- **Item & Warehouse Management**
- **Purchasing Items**

- **AP, AR & GL**
- **Reports & Dashboard**
- **Admin Topics**
- **Version Release & QA Notes**

1. Select a category from the left navigation menu or from the category tiles on the Knowledge Base home page.

2. Browse the available articles within that category.



3. Select an article to view its content.

How to Use the Popular Articles Section

The **Popular Articles** section on the Knowledge Base home page provides quick access to frequently viewed articles.

Examples of articles that may appear in this section include:

- Sales Order Screen - How To's
- Invoice Screen - How To's
- Find Parts Screen - How To's
- 1place Master Version Changes Log
- Previous Releases

Select an article to open it directly.

How to Find New Articles

The **New Articles** section highlights recently added Knowledge Base articles.

This section can help you discover newly documented features, processes, and updates without having to search for them individually.

Select an article from the list to view it.

How to Find Updated Articles

The **Updated Articles** section highlights articles that have recently been updated.

This can be useful when a 1place feature or process has changed and the corresponding Knowledge Base documentation has been revised.

Select an article from the list to view the latest information.

How to Use the Knowledge Base Navigation Menu

The navigation menu on the left side of the Knowledge Base provides access to the main areas of the site.

From the navigation menu, you can access:

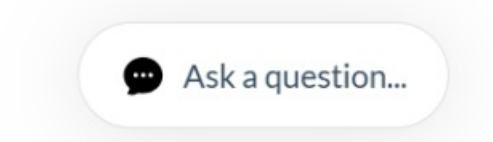
- **Home** - Return to the Knowledge Base home page.
- **Glossary** - Access glossary information.
- **Getting Started** - Find introductory information for using 1place.
- **Sales & Order Entry** - Find articles related to sales and order entry.
- **Sales Integration** - Find integration-related documentation.
- **Order Fulfillment** - Find order fulfillment documentation.
- **Item & Warehouse Management** - Find item and warehouse management information.
- **Purchasing Items** - Find purchasing-related documentation.
- **AP, AR & GL** - Find accounting-related documentation.
- **Reports & Dashboard** - Find reporting and dashboard information.
- **Admin Topics** - Find administrative and configuration information.
- **Version Release & QA Notes** - Find release notes and QA-related documentation.

How to Use the Ask a Question AI Chatbot

The **Ask a question...** feature is an **AI-powered chatbot** that helps you quickly find information in the 1place.cloud Knowledge Base.

Instead of searching through categories or trying to find the right keywords, you can ask a question in your own words and let the chatbot help you find relevant information.

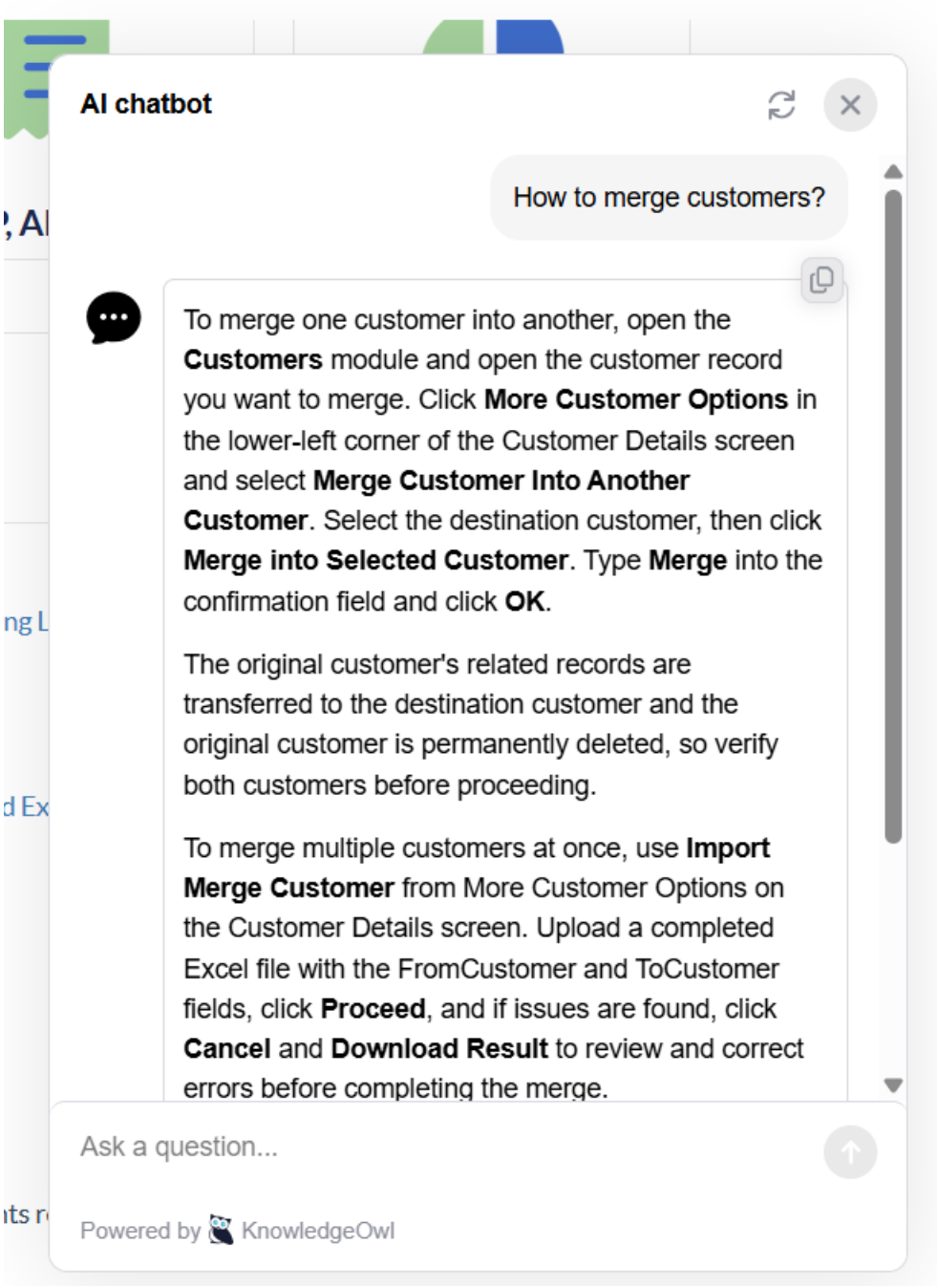
1. Select **Ask a question...** in the lower-right corner of the Knowledge Base.



2. Enter your question or describe what you are trying to accomplish.

3. Review the response and the related information provided.

4. Use the information or follow the referenced Knowledge Base content for additional details.



Tip: You can ask questions using natural language. For example:

- *How do I create a credit memo?*
- *Where can I configure payment terms?*
- *How do I print item labels?*
- *How do I set up the Customer Portal?*

The AI chatbot is especially useful when you know **what you want to accomplish but are not sure which article or category to look for**.

How to Use Knowledge Base Articles

Knowledge Base articles are organized to help you find information about specific 1place features and tasks.

When viewing an article:

- Review the topic title to confirm it covers the feature or task you need.
- Follow the listed steps in order when completing a process.
- Pay attention to exact screen names, field names, and settings referenced in the instructions.
- Check related or additional topics when more information is needed.

How to Find Information About a Recent 1place Update

For information about recent changes to 1place, use the Version Release & QA Notes category.

The Knowledge Base may include:

- Current version changes
- New features and enhancements
- Bug fixes
- Previous releases
- QA and testing information

The **New Articles** and **Updated Articles** sections on the home page can also help identify recently documented changes.

How to Return to the Knowledge Base Home Page

To return to the main Knowledge Base page:

1. Select **Home** from the left navigation menu.
2. Use the search bar, category tiles, or article lists to continue browsing.