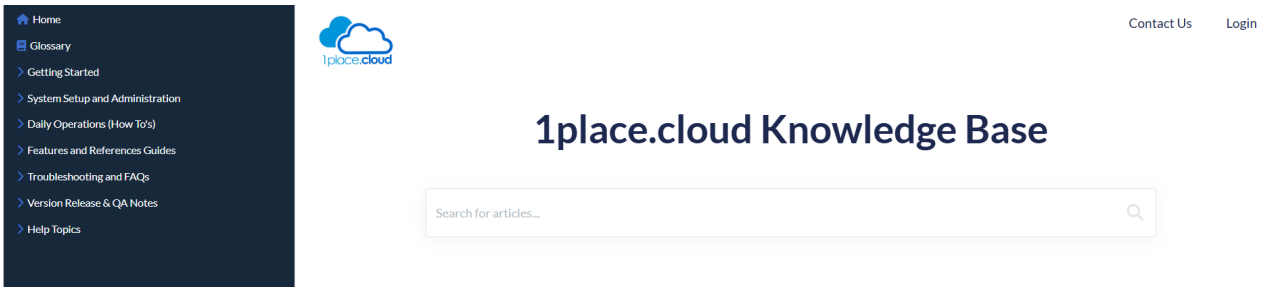
How to Use the 1place Knowledge Base

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Overview

Use the 1place Knowledge Base to learn a process, find instructions for a task, understand a screen, or troubleshoot an issue.



This guide explains how to search, browse the categories, and use the AI chatbot to find information relevant to your work.

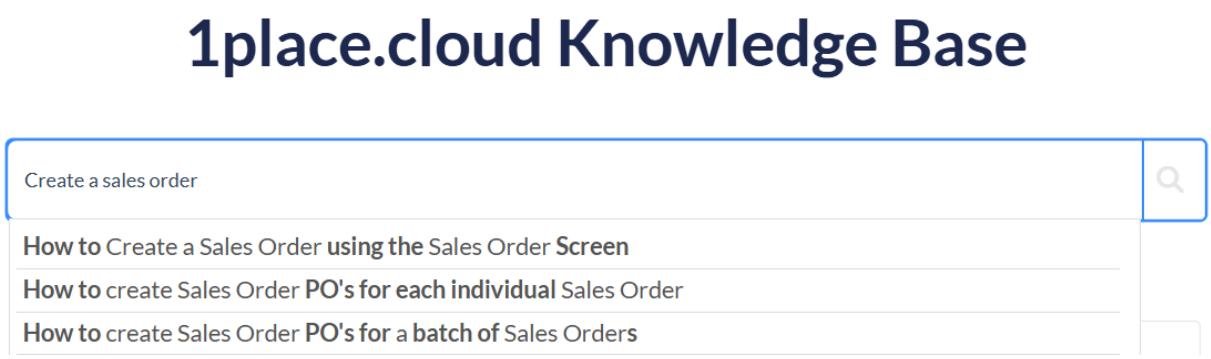
1. Start with What You Need to Accomplish

Think about the task or question you need help with. Include the screen name or process when you know it.

For example, an accounting employee receiving a customer's check might search for **payment multiple invoices**. A warehouse employee putting away received stock might search for **move dock items to bins**.

Specific descriptions help you choose instructions that match your situation.

2. Search for an Article



On the Knowledge Base home page, enter a keyword or phrase in **Search for articles...** and run the search. Review the results, then open the article that matches your task.

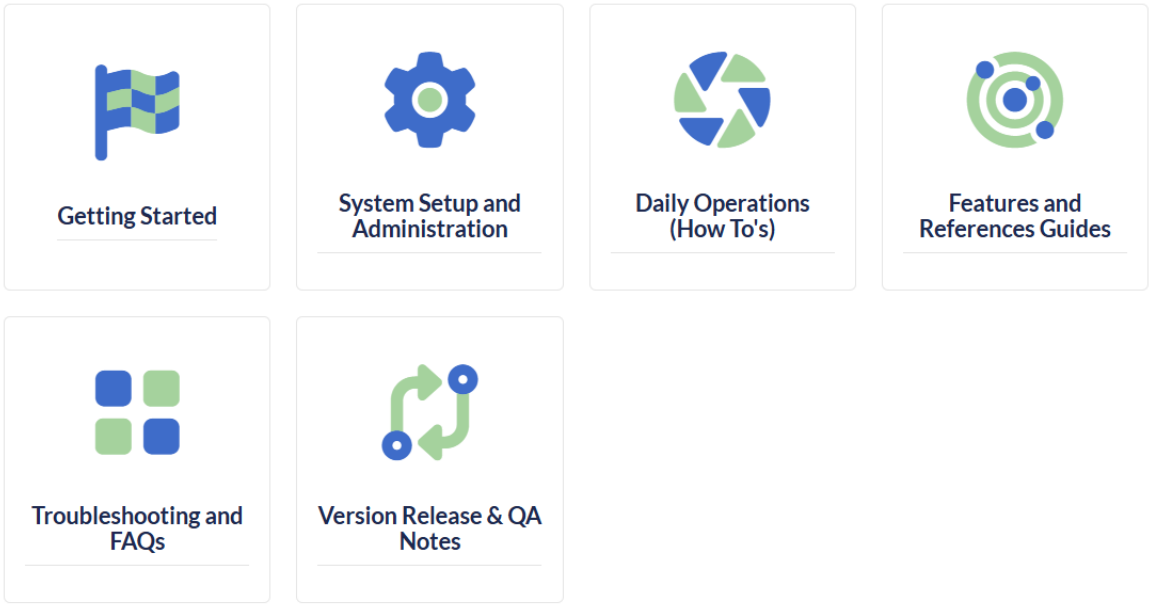
Useful search phrases include:

- **Create a sales order**
- **Import vendor list**
- **Receive a PO without a scanner**
- **Customer statements**

If the results are too broad, add a detail such as **scanner**, **Excel**, or the screen name.

3. Browse by Category

Use the category tiles on the home page or the left navigation menu. Choose a category, open the relevant subcategory, and select an article.



Getting Started

Start here when learning 1place or preparing your team to use it. Explore**Introduction and Navigation**, **Learning Paths**, **Practice and Training**, and **Preparing to Go Live**.

For example, a new sales employee can begin with the sales and customer service learning path.

System Setup and Administration

Use this category when configuring how 1place works for your company. It includes user access, company settings, pricing and tax configuration, data migration, integrations, and printing setup.

Daily Operations (How To's)

Use this category for instructions on completing everyday work. Browse the relevant item, purchasing, receiving, sales, accounting, or reporting topic.

For example, to apply a customer payment, open **Accounts Receivable (AR)** and choose the payment guide that matches your situation.

Features and References Guides

Use this category to understand terminology, screen fields, and technical references. It is useful when you need to understand what a field or feature means before using it.

Troubleshooting and FAQs

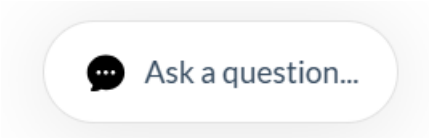
Use this category when you encounter a problem or need an answer to a specific question. Topics include QuickBooks Online, inventory and customer balances, browser help, and getting support.

Version Release & QA Notes

Use this category to review new features, improvements, bug fixes, and previous releases. 1place.cloud Knowledge Base

4. Ask the AI Chatbot

Select **Ask a question...** in the lower-right corner and describe what you need to do. Review the answer and open the referenced articles for the full instructions.



Include enough context to distinguish your workflow. For example:

- “How do I receive a purchase order without a scanner?”
- “How do I apply one payment to several invoices and credits?”
- “Where do I configure customer payment terms?”

The chatbot is useful when you know your goal but are unsure which article to open.

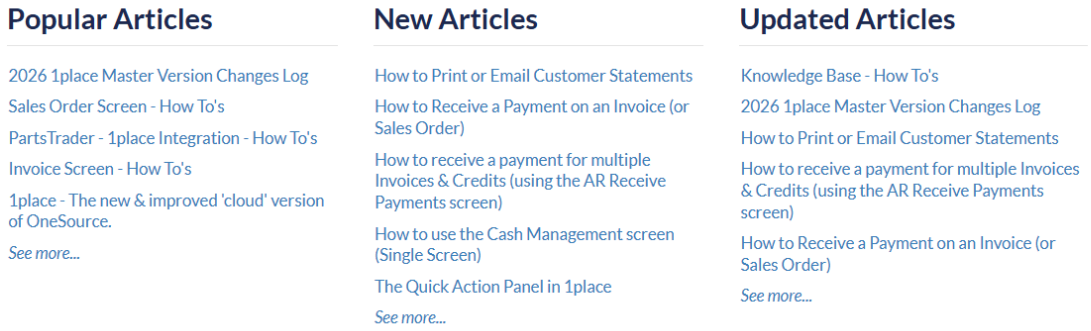
5. Check That the Article Fits Your Situation

Before following the instructions, confirm that the article covers the screen and method you are using.

For example, receiving stock with a scanner follows a different workflow from receiving it directly on a purchase order. Similarly, entering one item manually differs from importing a list.

Read the overview and any prerequisites, follow the steps in order, and use screenshots to help identify the controls. Open related articles when you need setup instructions or the next stage of a process.

6. Explore New and Updated Information



The home page provides three article lists:

- **Popular Articles:** Frequently viewed content.
- **New Articles:** Recently added guides.
- **Updated Articles:** Recently revised content.

For changes to the software itself, review the 2026 1place Master Version Changes Log under **Version Release & QA Notes**.

7. Look Up Unfamiliar Terms

Select **Glossary** in the navigation menu to look up terminology used in 1place. Return to the article after reviewing the term so you can continue the task.

8. Get Additional Help

If you still need assistance, browse **Troubleshooting and FAQs > Getting Support**.

When requesting help, include:

- What you were trying to accomplish.
- The screen and step where you encountered the issue.
- The exact error message, if one appeared.
- A relevant transaction number and screenshot.

These details help support understand your situation and investigate it.

Select **Home** in the navigation menu whenever you want to return to the Knowledge Base's main page.

