

Sales Settings - How to Configure

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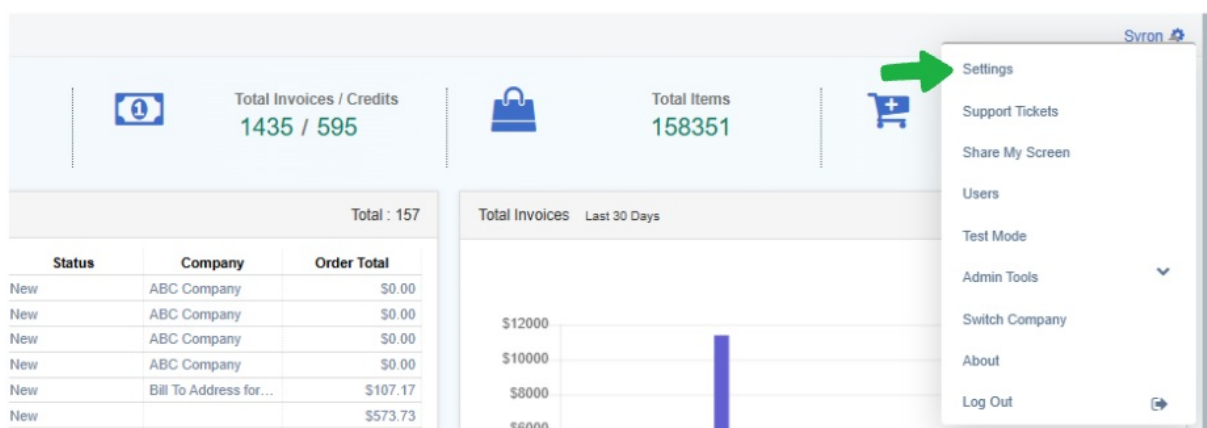
Overview

General Sales Settings control several important aspects of how sales transactions are handled in 1place. These settings define your company's sales behavior, default values, payment terms and methods, shipping options, order sources, and cost-related preferences.

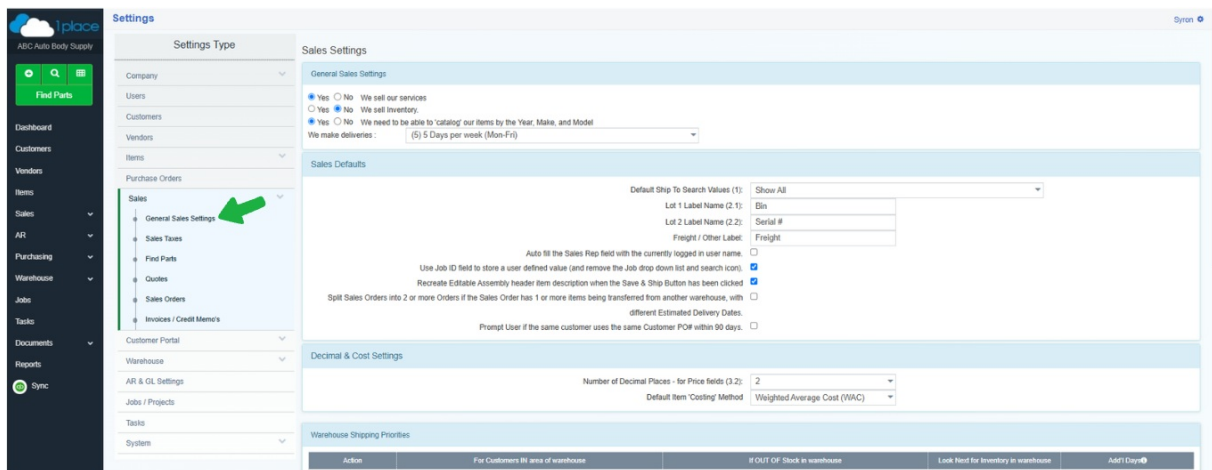
Configuring these settings correctly helps ensure that Sales Orders, Invoices, payments, deliveries, and related sales processes use the appropriate information and defaults for your business.

How to Access General Sales Settings

1. Select the **Gear** icon.
2. Select **Settings**.



3. Under **Settings Type**, select **Sales**.
4. Then click **General Sales Settings**.



General Sales Settings

The **General Sales Settings** section defines basic information about how your business sells products and services.

Sales Settings

General Sales Settings

☒ Yes
☐ No
We sell our services

☐ Yes
☒ No
We sell Inventory.

☒ Yes
☐ No
We need to be able to 'catalog' our items by the Year, Make, and Model

We make deliveries :

(5) 5 Days per week (Mon-Fri)

We sell our services

Select **Yes** if your business sells services through 1place. Select **No** if your business does not sell services.

We sell Inventory

Select **Yes** if your business sells inventory through 1place. Select **No** if your business does not sell inventory.

We need to be able to 'catalog' our items by the Year, Make, and Model

Select **Yes** if your business needs to organize or identify items using **Year, Make, and Model** information. Select **No** if this type of cataloging is not needed.

We make deliveries

Select the option that represents how frequently your business makes deliveries.

This setting helps 1place determine the available delivery schedule used in sales and delivery-related processes.

Sales Defaults

The **Sales Defaults** section controls default values and behaviors used when working with sales transactions.

The screenshot shows the 'Sales Defaults' configuration page. It includes a table for 'Default Ship To Search Values' with columns for 'Lot 1 Label Name', 'Lot 2 Label Name', and 'Freight / Other Label'. Below the table are several checkboxes for various settings, including 'Auto fill the Sales Rep field', 'Use Job ID field', 'Recreate Editable Assembly header item description', 'Split Sales Orders into 2 or more Orders', and 'Prompt User if the same customer uses the same Customer PO# within 90 days'.

Default Ship To Search Values (1):	Default Ship To Search Values (2):	Default Ship To Search Values (3):
Lot 1 Label Name (2.1):	Bin	
Lot 2 Label Name (2.2):	Serial #	
Freight / Other Label:	Freight	

Auto fill the Sales Rep field with the currently logged in user name. ☐

Use Job ID field to store a user defined value (and remove the Job drop down list and search icon). ☒

Recreate Editable Assembly header item description when the Save & Ship Button has been clicked ☒

Split Sales Orders into 2 or more Orders if the Sales Order has 1 or more items being transferred from another warehouse, with different Estimated Delivery Dates. ☐

Prompt User if the same customer uses the same Customer PO# within 90 days. ☐

Default Ship To Search Values

The screenshot shows the 'Default Ship To Search Values (1):' dropdown menu. The selected option is 'Show All'. Other visible options include 'Show All' and 'Only Ship To's Linked To 'Bill To' or 'Both'.

Default Ship To Search Values determines which Ship To search values are available by default when searching for a customer's shipping location.

Review this setting based on how your users typically search for Ship To addresses.

Lot 1 Label Name

The screenshot shows the 'Lot 1 Label Name (2.1):' input field. The value entered is 'Bin'.

Use **Lot 1 Label Name** to define the label displayed for the first lot-tracking field.

For example, this can be labeled **Bin** when the field is being used to identify a bin location.

Lot 2 Label Name

The screenshot shows the 'Lot 2 Label Name (2.2):' input field. The value entered is 'Serial #'.

Use **Lot 2 Label Name** to define the label displayed for the second lot-tracking field.

For example, this can be labeled **Serial #** when the field is being used to identify serial numbers.

Freight / Other Label

Freight / Other Label:

Use **Freight / Other Label** to define the label displayed for the freight or other charge field.

For example, the field can be labeled **Freight** when used to identify freight charges.

Auto fill the Sales Rep field with the currently logged in user name

Auto fill the Sales Rep field with the currently logged in user name. ☐

When enabled, the **Sales Rep** field is automatically populated with the name of the currently logged-in user.

This can help reduce manual entry when users normally create sales transactions for themselves.

Use Job ID field to store a user defined value

Use Job ID field to store a user defined value (and remove the Job drop down list and search icon). ☒

When enabled, the **Job ID** field can be used to store a user-defined value instead of using the standard Job selection functionality.

Recreate Editable Assembly header item description when the Save & Ship Button has been clicked

Recreate Editable Assembly header item description when the Save & Ship Button has been clicked ☒

When enabled, 1place recreates the editable assembly header item description when the **Save & Ship** button is selected.

Split Sales Orders into 2 or more Orders if the Sales Order has 1 or more items being transferred from another warehouse, with different Estimated Delivery Dates

Split Sales Orders into 2 or more Orders if the Sales Order has 1 or more items being transferred from another warehouse, with ☐ different Estimated Delivery Dates.

When enabled, 1place can split a Sales Order into multiple Sales Orders when items are being transferred from another warehouse and have different **Estimated Delivery Dates**.

Prompt User if the same customer uses the same Customer PO# within 90 days

Prompt User if the same customer uses the same Customer PO# within 90 days. ☐

When enabled, 1place prompts the user when the same customer has used the same **Customer PO#** within the previous 90 days.

This can help users identify potentially duplicate or repeated Customer PO# entries.

Decimal & Cost Settings

The **Decimal & Cost Settings** section controls how price values and item costing are handled.

Decimal & Cost Settings	
Number of Decimal Places - for Price fields (3.2):	2 ▼
Default Item 'Costing' Method	Weighted Average Cost (WAC) ▼

Number of Decimal Places - for Price fields

Use this setting to determine the number of decimal places displayed for applicable **Price** fields.

For example, selecting **2** displays prices using two decimal places.

Default Item 'Costing' Method

Select the default costing method used for item costs.

The available options shown in the settings are:

- **Weighted Average Cost (WAC):** Uses the average cost of inventory on hand to determine item cost.
- **First In First Out (FIFO):** Uses the cost of the oldest inventory first when determining the cost of items sold.

The costing method should be configured according to how your business wants item costs to be calculated and tracked.

Warehouse Shipping Priorities

Warehouse Shipping Priorities determines which warehouses 1place uses when looking for inventory to fulfill a Sales Order.

Action	For Customers IN area of warehouse	IF OUT OF Stock in warehouse	Look Next for Inventory in warehouse	Add'l Days
⋮ ✕	Anaheim	Anaheim	Long Beach	5
⋮ ✕	Anaheim	Long Beach	Riverside	5
⋮ ✕	Long Beach	Long Beach	Riverside	5
⋮ ✕	Long Beach	Riverside	Anaheim	5
⋮				

Save Warehouse Priorities

Each priority can be configured based on the customer's area and inventory availability.

The settings include:

- **For Customers IN area of warehouse** - Select the warehouse that normally serves customers in that warehouse's area.
- **If OUT OF Stock in warehouse** - Select the warehouse to consider when the primary warehouse does not have the required inventory.
- **Look Next for Inventory in warehouse** - Select the next warehouse where 1place should look for available inventory.
- **Add Days** - Specify the additional number of days to add when inventory needs to be sourced from another warehouse.

You can add multiple warehouse priority rules to define different fulfillment paths.

For example, a rule can be configured so that:

Anaheim customer area → if out of stock, check **Long Beach** → then look for inventory in **Riverside** → **Add 5 Days**.

Use the **Action** controls to manage the priority rows and select **Save Warehouse Priorities** when finished.

This section is particularly important when a business operates **multiple warehouses**, because it helps define how 1place should look for inventory when the customer's primary warehouse cannot fulfill the order.

Payment Terms

The **Payment Terms** section defines the payment terms available when working with customers and sales transactions.

Payment Term Name	# of Days	# Days for Discount	Discount Percent	Date Last Synced	Action
10th of month	10	0	0		✕
10th of the month	0	0	0		✕
Net 10	10	0	0		✕
Net 15	15	0	0		✕
Net 30	30	0	0		✕
	0	0	0		✕

Save

Payment terms include:

- **Payment Term Name** - The name displayed for the payment term.

- **# of Days** - The number of days associated with the payment term.
- **# Days for Discount** - The number of days during which an applicable payment discount is available.
- **Discount Percent** - The percentage discount associated with the payment term.
- **Date Last Synced** - Displays the date the payment term was last synchronized, when applicable.
- **Action** - Used to remove a payment term from the list.

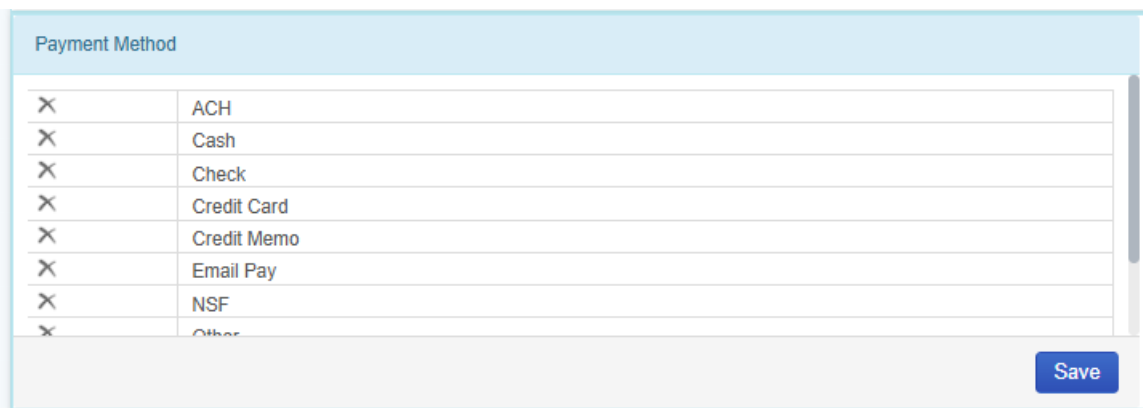
Examples of payment terms may include:

- **Net 10**
- **Net 15**
- **Net 30**
- **10th of the month**

Review your payment terms to make sure the available options accurately represent the terms your business offers to customers.

Payment Method

The **Payment Method** section contains the payment methods available for sales and payment transactions.



Payment Method	
X	ACH
X	Cash
X	Check
X	Credit Card
X	Credit Memo
X	Email Pay
X	NSF
X	Other

Save

Examples shown include:

- **ACH**
- **Cash**
- **Check**
- **Credit Card**
- **Credit Memo**
- **Email Pay**
- **NSF**
- **Other**

Maintain the payment methods that your business uses so users can select the appropriate method when recording payments.

Shipped Via

The **Shipped Via** section defines the shipping and delivery methods available for sales transactions.

Shipped Via			
	Shipped Via	Delivery Fee	Sched Delivery # Days Later
✕		\$0.00	0
✕	Container	\$0.00	0
✕	Customer Pickup	\$0.00	0
✕	Delivery charge	\$10.00	0
✕	FedEx2	\$0.00	0
✕	Truck 1	\$10.00	1
✕	Truck 2	\$0.00	2
✕	Truck 3	\$0.00	3
✕	Truck 4	\$0.00	4
✕	Truck 5	\$0.00	5

Each shipping method can include:

- **Shipped Via** - The name of the shipping or delivery method.
- **Delivery Fee** - The fee associated with the shipping or delivery method.
- **Sched Delivery # Days Later** - The number of days later that delivery is scheduled for the selected shipping method.

Examples shown include:

- **Container**
- **Customer Pickup**
- **Delivery charge**
- **FedEx2**
- **Truck 1**
- **Truck 2**
- **Truck 3**
- **Truck 4**
- **Truck 5**

Configure these options to reflect the shipping carriers, delivery methods, and customer pickup options used by your business.

Source of Order

The **Source of Order** section contains the available sources that can be associated with sales orders.

Source Of Order

X	
X	Amazon
X	CCC
X	eBay
X	OPSTrax
X	PartsTrader
X	Referral
X	Re-Order

Save

Examples shown include:

- Amazon
- CCC
- eBay
- OPSTrax
- PartsTrader
- Referral
- Re-Order

Maintaining accurate order sources helps identify where sales orders originate and can be especially useful when orders are received through integrations or other sales channels.

Saving Your Settings

After reviewing or updating the applicable sections, select **Save** for the section you are working on.

Review each section carefully to make sure the settings match your business processes before relying on them for sales transactions.
