Common Things to Check Before Going Live in 1place

Last Modified on 10/14/2026 5:19 pm EDT

Before going live with 1place, use this guide to review your company setup, users, customers, inventory, warehouses, transactions, integrations, and other key areas.

This guide is intended to help you confirm that 1place is configured to match how your business operates and that your team is ready to begin using the system.

Complete the sections that apply to your business. Some topics include links to detailed KBAs with step-by-step instructions.

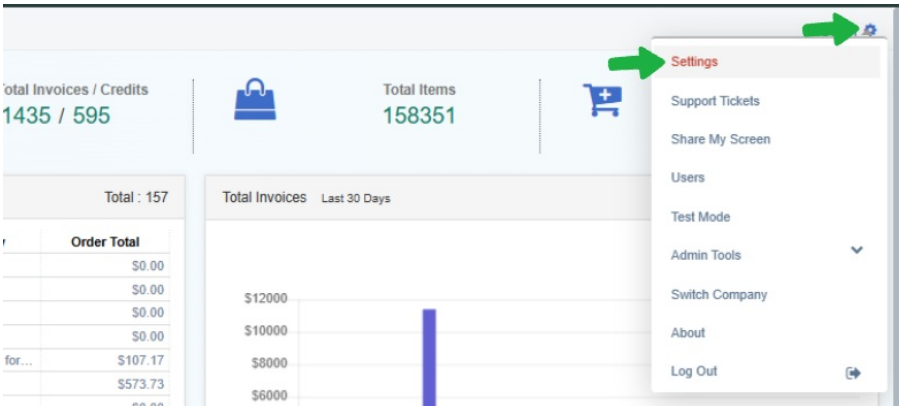
1. Company and System Setup

Start by configuring the basic company and system information used throughout 1place.

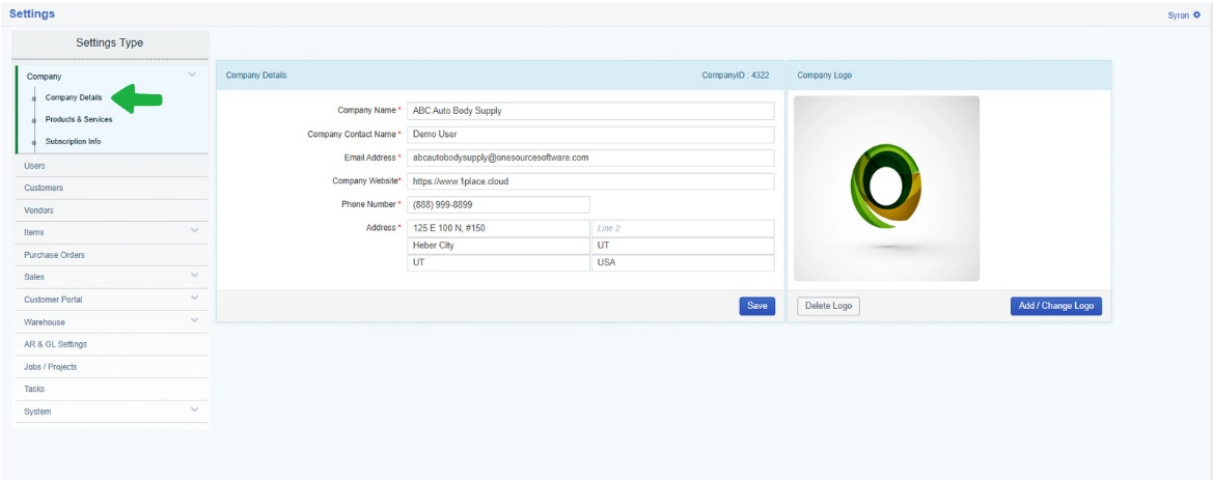
Company Information

Before going live, verify that your company information is complete and accurate. This information may be used throughout 1place and on printed documents.

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



3. Under **Settings Type** go to **Company**.
4. Select **Company Details**.



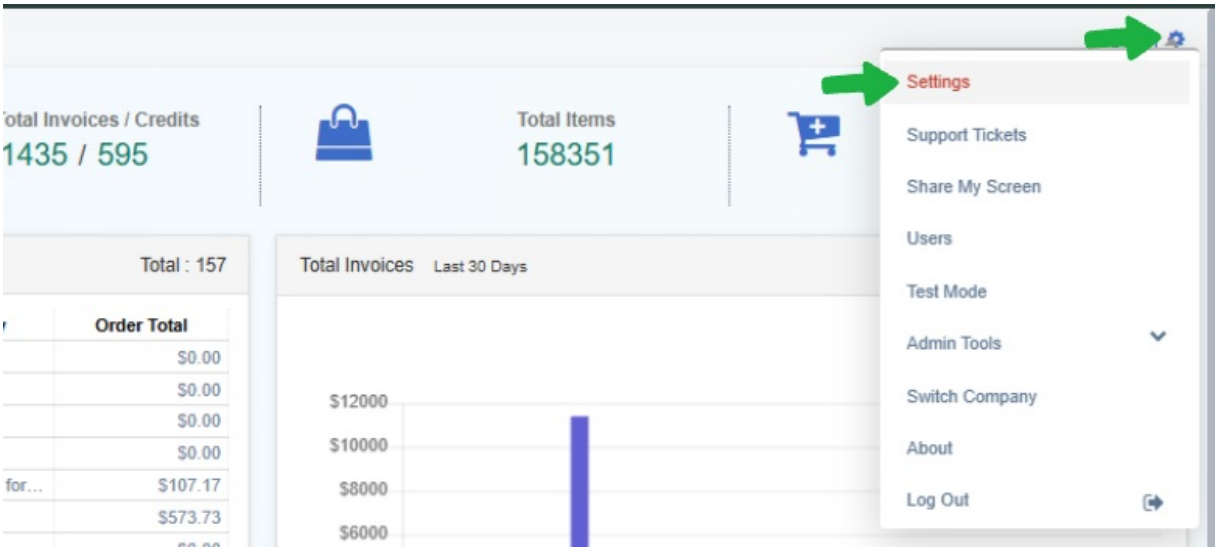
5. Update the following company information:
    - **Company Name***
    - **Company Contact Name***
    - **Email Address***
    - **Company Website***
    - **Phone Number***
    - **Address***

6. Take note of your **Company ID**. You may need this information when working with 1place Support or setting up integrations.
7. Upload your **Company Logo**.
8. **Save** your changes.

Products and Services

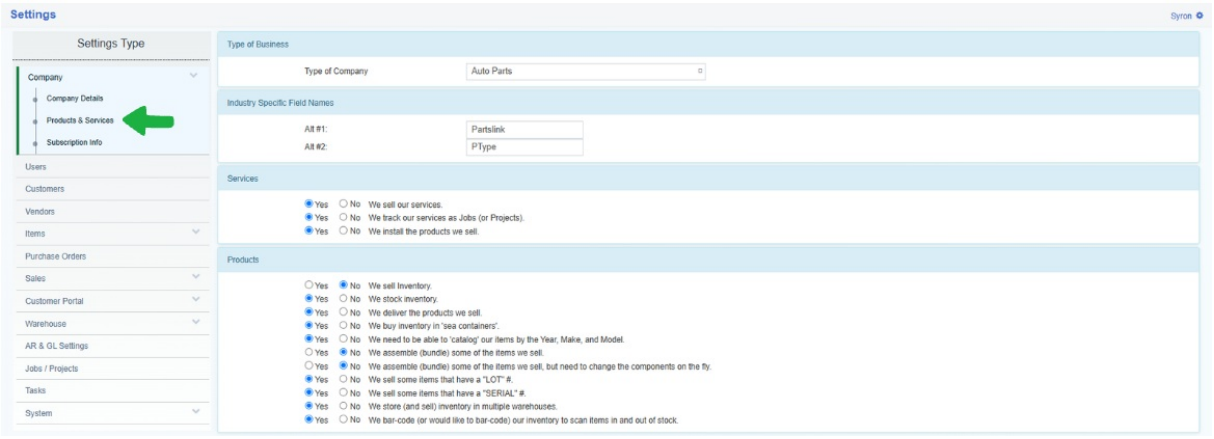
Before going live, review the **Products & Services** settings to make sure they accurately reflect how your business operates.

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

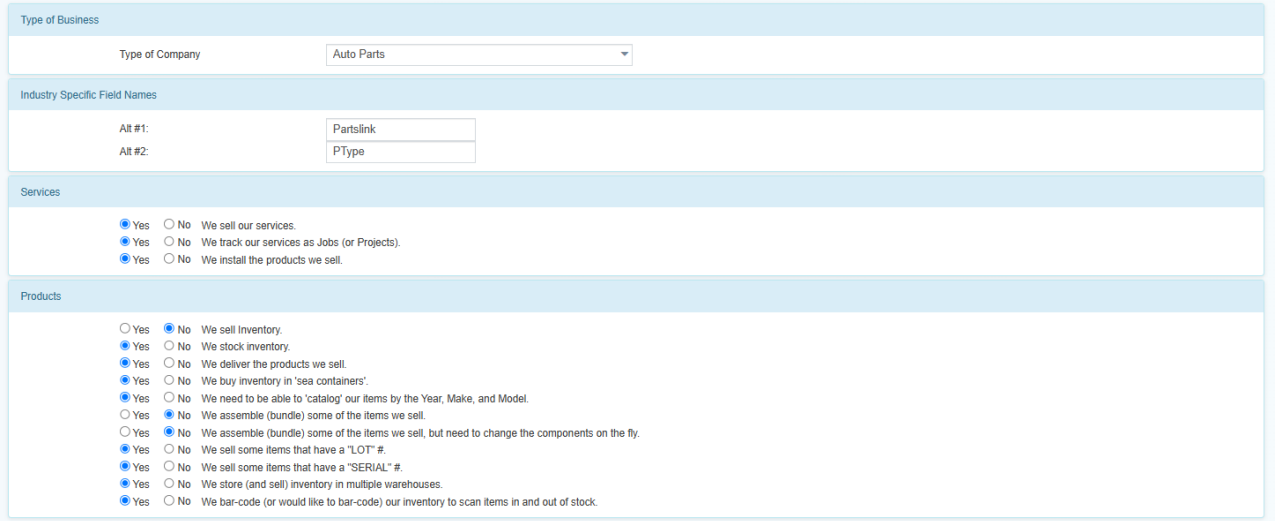


3. Under **Settings Type** go to **Company**.

4. Select **Products & Services**.



5. Review and configure the following:



Review:

Type of Business

- Type of Company

Industry-Specific Field Names

-
- Alt #1
- Alt #2

Services

- We sell our services.
- We track our services as Jobs (or Projects).
- We install the products we sell.

Products

- We sell Inventory.
- We stock inventory.
- We deliver the products we sell.
- We buy inventory in "sea containers."
- We need to catalog our items by Year, Make, and Model.
- We assemble (bundle) some of the items we sell.
- We assemble (bundle) some of the items we sell, but need to change the components on the fly.
- We sell some items that have a LOT #.
- We sell some items that have a SERIAL #.
- We store and sell inventory in multiple warehouses.
- We barcode or would like to barcode our inventory to scan items in and out of stock.

Record Numbering

Review how record numbers are generated for the different types of records in 1place.

For detailed instructions, see How to Set Up Record Number Settings.

Print and Document Settings

Review your print defaults and document settings before going live.

Confirm that:

- Documents use the correct company information and logo.
- The correct number of copies are configured.
- Required printers are configured.
- Print defaults are appropriate for each workstation or process.

For detailed instructions, see Print Settings.

2. Users and Security

Set up user accounts and make sure each employee has the appropriate access.

Review:

- User accounts for all employees who will use 1place
- Security Groups
- Module Security
- View, New, Edit, Print, and Delete permissions
- Administrative access
- Access to the modules and functions required for each user's role

Before going live, have users log in and verify that they can access the features they need.

For detailed instructions, see How to Set Up User Security.

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3. Customer Setup

Configure customer defaults and review the information that will be used when creating and maintaining customer records.

Customer Settings

Review:

- New Customer Defaults
- Customer Auto Fill Profiles
- Customer information requirements
- Customer-specific settings

For detailed instructions, see How to Configure Customer Settings.

Customer Pricing

Review:

- Default pricing methods
- Pricing levels
- Pricing templates
- Customer-specific pricing, where applicable

4. Item and Inventory Setup

Review your item and inventory information before processing live transactions. Verify that item details, pricing, pictures, labels, and inventory quantities are set up correctly.

Review Items

Confirm that all items have been imported or created correctly.

1. From the main menu, select **Items**. The item list displays the items that have been imported or created.
2. Use the **Search** bar to find a specific item.
3. Select an item to open its **Item Details**.
4. Review the item information and confirm that the details are correct.

Review Item Pricing and Costs

Confirm that your item pricing and costs are correct.

From **Item Details**, select the **Financial** tab to review:

- List Price
- Item Cost
- Item Pricing

For more information, see Items - Pricing How To's.

Review Item Pictures

Confirm that item pictures are available where needed.

From **Item Details**, select the **Pictures** tab to view the pictures associated with the item. Add or update pictures as needed.

For more information, see Items - Pictures.

Configure Item Labels

If your business uses item labels, make sure the labels are configured before going live.

For detailed instructions, see Creating and Printing Item Labels - How To's.

Verify Inventory Quantities

Confirm that inventory quantities are accurate before processing live transactions.

From **Item Details**, select the **Stock** tab to review the item's inventory quantities.

The **Stock** tab also provides tools for managing inventory, including:

- **Adjust Quantities in Stock**
- **Recalculate Quantities in Stock**
- **Recalculate ALL Quantities in Stock**
- **View Qtys by Warehouse**
- **View Default Bin by Warehouse**
- **Transfer Inventory**

Review inventory quantities by warehouse and make any necessary adjustments before Go-Live.

5. Warehouse Setup

Set up your warehouses and the locations used to store, receive, pick, and ship inventory.

Review:

- Warehouses

- Warehouse types
- Bins
- Zones
- Staging areas
- Shipping and receiving locations
- Stock transfer settings
- Warehouse-specific settings
- Scanner settings

For detailed instructions, see How to Set Up Warehouse Settings.

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6. Sales and Order Entry

Review the settings used to create, process, and complete customer transactions.

Confirm that the following are configured for your business:

> Configure **Sales Order Settings** to control how Sales Orders behave, including order quantities, printing, back orders, delivery fees, partially shippable items, and custom terms and conditions.
>
> ## How to Configure Sales Order Preferences

1. Select the **Gear** icon.
2. Select **Settings**.
3. Under **Settings Type** go to **Sales**.
4. Select **Sales Order**.
5. Review and configure the settings under **Sales Order Preferences**.

Sales Order Preferences

Tab All Fields
Select this option to be able to tab on all available fields when working with Sales Orders.

Auto-Fill Ship Qty With Order Qty

Automatically fills the **Ship Qty** with the **Order Qty** on Sales Order line items.

Prompt User to Mass Update Sales Order Qty Ordered to 0 for Back Ordered Items
Prompts the user to update the **Qty Ordered** to 0 for all back-ordered items when the user changes the Qty Ordered from a quantity to 0.

Prevent Duplicate Delivery Fee
Prevents a customer from being charged more than one delivery fee per day when the customer's delivery fee is greater than $0.

Auto Print Sales Order
Automatically prints the Sales Order when the **Create Invoice & Print** button is selected.

Auto Print Invoice
Automatically prints the Invoice when the **Create Invoice & Print** button is selected.

Auto Calc Net Available
Automatically calculates the item's net available quantity.

Prompt User to Split Line Items for Partially Shippable Quantities
Prompts the user to split a Sales Order line item when only part of the ordered quantity can be shipped.

Prompt User(s) to "PLEASE MOVE CASH NOW" on the Find Parts and Sales Order Screens
Displays a prompt when the customer's cash amount exceeds the configured threshold.

Enter the required amount in the field next to this setting.

After Adding an Item to a Sales Order, Auto Select the Sales Order Line Item "PO" Checkbox When the Item Is Out of Stock
Select **Yes** to automatically select the **PO** checkbox when an item added to a Sales Order is out of stock.

Make a Back Order When Converting a Sales Order to an Invoice
Select **Yes** to create a Back Order when converting a Sales Order to an Invoice if one or more line items have a quantity in the **Qty BO** field.

When an Item Is Selected on a Sales Order, Display Any Notes Entered in the Item > Special Notes Field
Choose how the item's **Special Notes** are displayed when the item is selected on a Sales Order.

How to Configure Custom Terms and Conditions

The **Custom Terms & Conditions** section allows you to add terms and conditions that are printed at the bottom of the applicable document.

1. Under **Custom Terms & Conditions**, select the applicable **Sales Order Type**.
2. Enter or update the terms and conditions.
3. Save your changes.

How to Configure Invoice Terms and Conditions

The **Invoice - Custom Terms & Conditions** section allows you to add terms and conditions that are printed at the

bottom of the Invoice.

1. Enter or update the terms and conditions in the text editor.
2. Save your changes.

Before Going Live

Review these settings with your sales and accounting teams to make sure the Sales Order workflow matches your business processes.

In particular, confirm:

- How quantities are automatically populated.
- How back orders are handled.
- How partially shippable items are handled.
- Whether Sales Orders and Invoices should print automatically.
- How out-of-stock items should be handled.
- Whether delivery fees should be limited to one per customer per day.
- Whether cash prompts are required.
- What terms and conditions should appear on Sales Orders and Invoices.

- Quote settings
- Invoice settings
- Credit Memo settings
- Payment terms
- Payment methods

Sales Tax

Review your sales tax settings and applicable tax rates before processing live transactions.

Proper sales tax setup helps ensure that the correct tax rates and rules are applied to applicable transactions, including Sales Orders, Invoices, and Credit Memos.

For detailed instructions, see How to Set Up Sales Tax Settings.

- Pricing templates
- Freight and other charges
- Customer PO# settings
- Sales Rep settings
- Sales Order document and print settings

7. Purchasing

The **Purchase Order Settings** control how purchase costs, PO line items, receiving, and related transactions are handled in 1place. Review these settings to make sure they align with your purchasing and receiving workflows.

When PO Cost Is Changed on a PO Line Item

Choose how 1place should handle changes to the cost of an item on a Purchase Order line.

- **Yes** – Automatically update the item's cost for the related vendor when the PO cost changes.
- **Prompt** – Ask the user whether to update the item's cost for the related vendor.
- **No** – Do not update the item cost and do not prompt the user.

Other Settings

Automatically sort the PO Line Items in

Choose how Purchase Order line items are sorted. The available option shown is **Alphabetical Order**.

Prompt user to auto create new AP Bill in QuickBooks Online after the PO has been received in full

When enabled, prompt the user to automatically create a new Accounts Payable (AP) Bill in QuickBooks Online after the Purchase Order has been received in full.

DO NOT prompt User to auto SHIP received items on the related (linked) Sales Order after items are RECEIVED.

When enabled, users will not be prompted to automatically ship items on the related Sales Order after the items have been received.

Tab All Fields

Controls the **Tab All Fields** option when entering or editing Purchase Order information.

When PO is received, auto fill the 'Default' Bin Location on all PO Line Items where the Bin Location is empty.

When enabled, 1place automatically fills in the Default Bin Location for Purchase Order line items that do not already have a bin location when the PO is received.

Number of Decimal Places - for Cost fields

Choose the number of decimal places displayed for cost fields.

When List Price field on PO is changed auto update the List Price on the item record

Choose how 1place handles changes to the List Price on a Purchase Order:

- **Prompt** – Ask the user whether to update the List Price on the item record.

- Review the available options and select the behavior that matches your business process.

Saving Your Settings

Review each option and configure it according to your purchasing and receiving workflows. Save your changes after updating the settings.

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8. Shipping and Receiving

Shipping/Receiving Settings control how Sales Orders, Purchase Orders, and Stock Transfers move through their respective shipping, receiving, and fulfillment workflows in 1place.

These settings allow you to configure warehouse worker selection, short-pick email notifications, and the statuses used to track Sales Orders, Purchase Orders, and Stock Transfers. Proper configuration helps ensure that transactions follow the intended workflow and that users can manage orders according to your business processes.

How to Access Shipping/Receiving Settings

1. Select the **Gear** icon.
2. Select **Settings**.
3. Under **Settings Type**, select **System**.
4. Open **Shipping/Receiving Settings**.

Options

The **Options** section contains general settings that affect warehouse picking and the display of shipping and receiving statuses.

When Warehouse Worker is Selected on To Print & Pick Screen

When enabled, selecting a warehouse worker on the **To Print & Pick** screen automatically selects all warehouse zones assigned to that user and then selects all items in those zones.

Enable this option if you want 1place to automatically select the assigned zones and their items when a warehouse

worker is chosen.

Show counts on each Ship/Receive statuses

When enabled, counts are displayed for each status in the shipping and receiving workflows.

This can help users see how many transactions are associated with each status.

Email Notifications

The **Email Notifications** section lets you specify which email addresses receive notifications when orders being picked are short picked.

Send Email Notification to the Following Emails when Orders being Picked are Short Picked

Enter the email addresses that should receive short-pick notifications.

To send notifications to multiple recipients, separate the email addresses with commas.

Configure this setting so the appropriate team members can follow up when the quantity picked is less than the quantity required.

Select **Save** to apply your changes.

Shipping - Sales Order Statuses

The **Shipping - Sales Order Statuses** section defines the statuses used to track Sales Orders through the shipping and fulfillment process.

Each status includes settings that control whether it is active, whether it appears on the Shipping/Receiving screen, how it is displayed, and which actions users can perform.

The available fields include:

- **Action** - Controls for managing or reordering status entries.
- **Active** - Determines whether the status is active.
- **Show on Shipping ...** - Determines whether the status is displayed on the Shipping/Receiving screen.
- **Status** - The system status name.
- **User Defined Status** - The status label displayed to users. This allows the displayed name to differ from the system status name.
- **Next Status** - Defines the next status available in the workflow, where configured.
- **Status Description** - Describes the purpose of the status.

- **Can Add Line Items** - Determines whether users can add line items while the Sales Order is in that status.
- **Can Edit Line Items** - Determines whether users can edit line items.
- **Can Delete Line Items** - Determines whether users can delete line items.
- **Can Delete Order** - Determines whether users can delete the Sales Order.
- **User Notes** - Provides a field for notes associated with the status.

Examples of Sales Order statuses shown include:

- Pending
- New
- WaitingToBePurchased
- To Print & Pick
- Picking
- WaitingForDelivery
- To Dispatch
- In Route to Customer
- To Cancel/Restock
- To Pack
- To Invoice
- To Load/Ship
- Closed

Review the statuses and their permissions to make sure they support your Sales Order fulfillment process. Pay particular attention to **Active**, **Show on Shipping**, **Next Status**, and the line-item and order permissions.

Select **Save** to apply changes to the Sales Order status settings.

Receiving - Purchase Order Statuses

The **Receiving - Purchase Order Statuses** section defines the statuses used to track Purchase Orders through the receiving process.

The available fields include:

- **Action** - Controls for managing or reordering status entries.

- **Active** - Determines whether the status is active.
- **Show on Shipping & ...** - Determines whether the status is displayed on the Shipping/Receiving screen.
- **Status** - The system status name.
- **User Defined Status** - The status label displayed to users.
- **Status Description** - Describes the purpose of the status.
- **Can Add Line Items** - Determines whether users can add line items to the Purchase Order.
- **Can Edit Line Items** - Determines whether users can edit line items.
- **Can Delete Line Items** - Determines whether users can delete line items.
- **Can Delete Order** - Determines whether users can delete the Purchase Order.
- **User Notes** - Provides a field for notes associated with the status.

Examples of Purchase Order statuses shown include:

- New
- Pending
- Waiting for Delivery
- In Route to Warehouse
- On Dock
- Received

Review these statuses to make sure they reflect how your business tracks Purchase Orders from creation and delivery through receiving.

Pay attention to the permissions assigned to each status. For example, the **Can Add Line Items** setting can be used to control whether users can add items at a particular stage of the receiving process.

Select **Save** to apply changes to the Purchase Order status settings.

Stock Transfer - Statuses

The **Stock Transfer - Statuses** section defines the statuses used to track inventory transfers between warehouses.

The available fields include:

- **Action** - Controls for managing or reordering status entries.
- **Active** - Determines whether the status is active.

- **Status** - The system status name.
- **User Defined Status** - The status label displayed to users.
- **Next Status** - Defines the next status in the transfer workflow, where configured.
- **Status Description** - Describes the purpose of the status.

Examples of Stock Transfer statuses shown include:

- To Print & Pick
- Picking
- To Cancel
- To Load / Ship
- Received
- To Dispatch
- In Route
- Closed
- New
- Pending
- To Pack
- To Invoice

Review the active statuses and their **Next Status** values to ensure Stock Transfers can progress through the intended workflow, from picking and dispatch to receipt at the destination warehouse.

Select **Save** to apply changes to the Stock Transfer status settings.

Saving Your Settings

Review each section and configure the options and statuses according to your business's shipping, receiving, and stock transfer processes.

Each section has its own **Save** button. Select the corresponding **Save** button after making changes to that section.

To learn more how to manage the Shipping and Receiving Screen, seeShipping and Receiving.

9. Accounting and Payments

Review the financial settings that affect customer payments, accounts receivable, and financial periods.

Confirm that the following are configured:

- AR settings
- Payment methods
- Payment terms
- Receive Payments settings
- Credit Memo settings
- Customer statements
- AR aging
- Financial periods
- Payment processing integrations
- EBizCharge setup, if applicable

Test payment processing before going live if your business uses an integrated payment provider.

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10. Integrations

Confirm that all integrations required by your business are connected, configured, and tested.

Review applicable integrations, including:

- CCC
- PartsTrader
- Car-Part.com
- EBizCharge
- Other API integrations

For each integration, verify:

- Integration credentials
- Customer mappings
- Item mappings
- Pricing mappings
- Warehouse mappings
- Delivery area and ZIP code settings
- Integration-specific settings
- Test transactions

Do not move an integration into live use until the required connection and transaction testing has been completed.

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11. Customer Portal

If your business uses the Customer Portal, review the portal settings and test the customer experience before going live.

Confirm that:

- Portal settings are configured.
- Portal branding is correct.
- Login and Signup settings are configured.
- Customer Portal users are set up.
- Portal invitations have been tested.
- Available customer features are correct.
- Portal pricing is correct.
- Portal invoices and orders are configured correctly.
- Portal payment options are configured.
- Portal search settings are configured.

Test the portal using a customer account before inviting live customers.

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12. Reports and Documents

Review the reports and documents your team will use regularly.

Confirm that the required documents and reports are available and configured correctly.

Review:

- Required reports
- Report filters and defaults
- Invoice and Credit Memo documents
- Sales Order documents
- Purchase Order documents
- Picking and packing documents
- Shipping documents
- Item labels
- Company logos
- Printer assignments

Print or preview important documents before going live to verify that the information and formatting are correct.

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13. OS Scan and Scanner Setup

If your business uses OS Scan, configure the scanners and test the workflows your warehouse and delivery teams will use.

Review:

- Scanner users

- Scanner permissions
- Scanner settings
- Picking settings
- Receiving settings
- Inventory settings
- Shipping settings
- Driver and delivery settings

Test required workflows using the actual scanners and representative inventory before going live.

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14. Data and Migration Validation

After your data has been imported or migrated, verify that the information in 1place is accurate.

Review:

- Customers
- Vendors
- Items
- Inventory quantities
- Warehouses and bins
- Pricing
- Customer and vendor mappings
- Open Sales Orders
- Open Purchase Orders
- Open Invoices and Credits
- Historical data, if applicable

Do not assume that imported data is correct simply because the import completed successfully. Review important records and compare them with your source data.

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15. Final Go-Live Check

Before your Go-Live date, complete a final review with the users responsible for each area of the system.

Users and Access

- Key users have successfully logged in.
- Users have the appropriate security access.
- Users understand their assigned responsibilities.

Core Workflows

- Customer creation has been tested.
- Item and inventory transactions have been tested.
- Sales Orders and Quotes have been tested.
- Invoicing has been tested.
- Credit Memos have been tested.
- Purchasing has been tested.
- Receiving has been tested.
- Shipping has been tested.
- Inventory transfers and adjustments have been tested.
- Payments have been tested.

Integrations

- Required integrations have been connected.
- Integration credentials have been verified.
- Required mappings have been reviewed.
- Test transactions have been completed successfully.

Documents and Printing

- Required documents have been reviewed.
- Printing has been tested.
- Printers are assigned correctly.
- Company information and logos appear correctly.

Customer Portal

If applicable:

- Customer Portal has been tested.
- Login and Signup have been tested.
- Customer invitations have been tested.
- Customer-facing features have been reviewed.

Data

- Required customer data has been validated.
- Required vendor data has been validated.
- Item and inventory data has been validated.
- Open transactions have been reviewed.
- Pricing has been validated.

Final Review

- Open issues have been reviewed.
- Any known limitations or pending items have been documented.
- Go-Live date has been confirmed.
- Support process has been confirmed.
- Key users know where to go for help after Go-Live.

After Go-Live

Continue monitoring your 1place environment during the initial Go-Live period.

Pay particular attention to:

- User access and security issues
- Customer and item data
- Inventory quantities
- Sales and purchasing workflows
- Shipping and receiving
- Payments
- Integrations
- Printing and documents
- Customer Portal activity
- Scanner workflows

Document any issues or questions that arise so they can be reviewed and addressed through the appropriate support process.