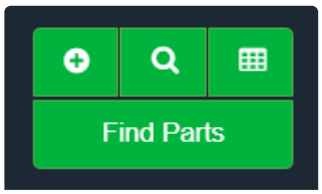
The Quick Action Panel in 1place

Last Modified on 11/18/2026 12:50 pm EST

Overview

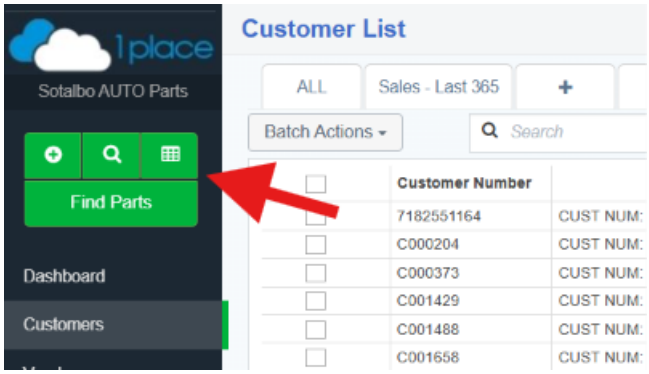
The **Quick Action Panel** puts common tasks within easy reach. While viewing the Customer List, for example, you can start a sales order, look up an invoice, open the Item List, or go straight to **Find Parts** without navigating through the main menus.



The Quick Action Panel

Where to find the Quick Action Panel

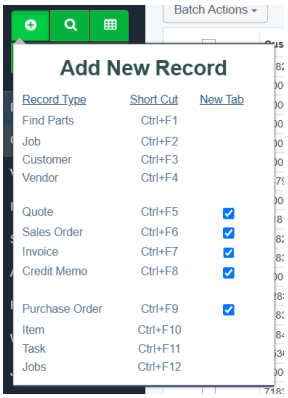
Look near the top of the **left navigation sidebar**, below your company name and above **Dashboard**. The panel has three green icon buttons (plus, magnifying glass, and grid), with **Find Parts** directly below them.



Add New Record (plus icon)

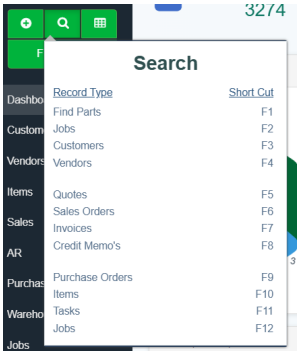
Use **Add New Record** to start a quote, sales order, invoice, customer record, or another type of record.

1. Click the **plus (+)** button in the Quick Action Panel.
2. If a **New Tab** checkbox is available next to the record type, select it to open the form in a separate tab and keep your current screen open.
3. Select the record type. For example, select **Sales Order** to open a new sales order form.
4. Enter the details and save the record.



Keyboard shortcuts. Press **Ctrl + F6** to start a sales order or **Ctrl + F7** to start an invoice.

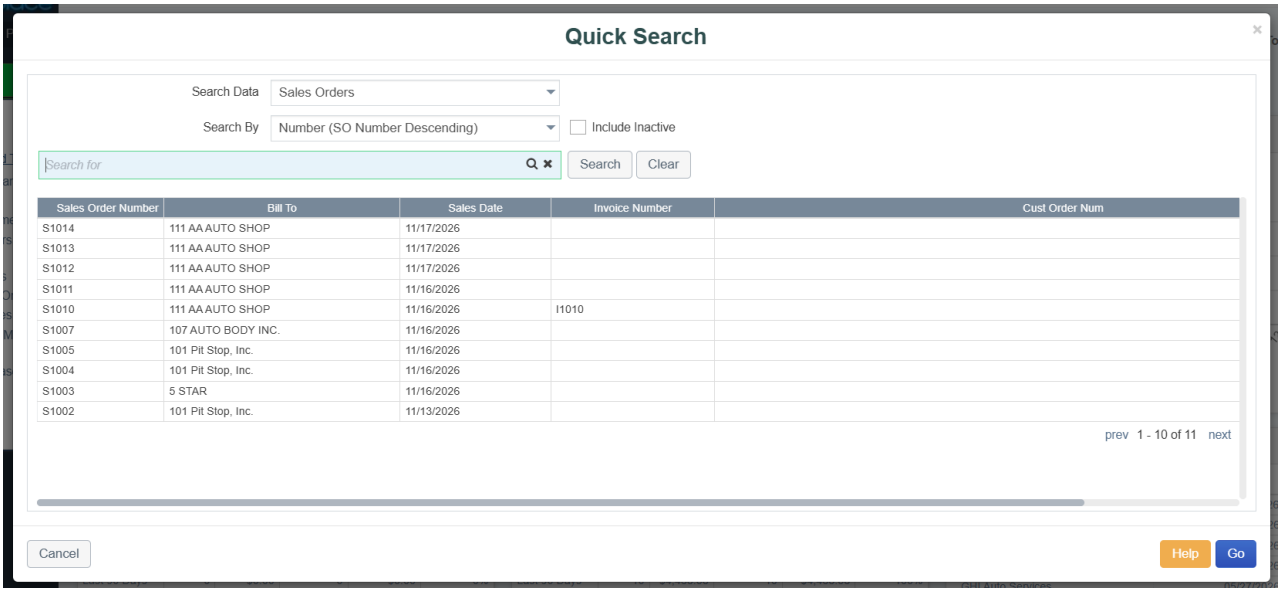
Quick Search (magnifying glass icon)



Use **Search** to find and open a specific record. **Quick Search** lets you choose which field to search, so you can use the information you already have. For example, if a customer gives you their purchase order (PO) number, you can use it to find their sales order or invoice.

Find and open a record

1. Click the **magnifying glass** in the Quick Action Panel, then select a record type, such as **Sales Orders** or **Invoices**.
2. In **Search By**, choose the field that matches the information you have. Choose **Number** if you have the invoice or sales order number. If you have the customer's PO number, choose the customer PO option.
3. Enter the value in **Search for**, then click **Search**.
4. Click the matching record in the results to open it.



Choose what to search by

The options in **Search By** depend on the record type.

- **Sales orders and invoices.** Search by record number, customer PO number, billing or shipping company, transaction date, line-item details, or comments. You can also search for sales orders by back order number.
- **Customers.** Search by company name, customer number, phone number, or address.
- **Items.** Search by item number, vendor item number, or description.

If you're already in Quick Search, use the **Search Data** dropdown to switch record types. For example, switch from **Sales Orders** to **Invoices** and search again using the same customer PO number. To include inactive records in

your results, select **Include Inactive** where available before running the search.

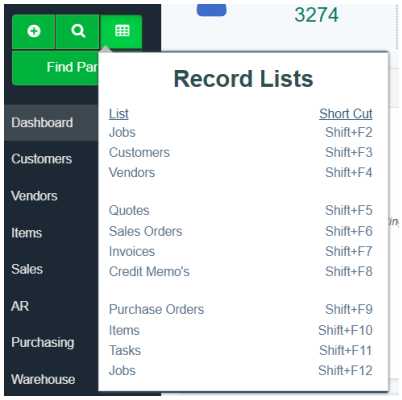
> **Keyboard shortcuts.** Press **F6** to open Quick Search for sales orders or **F7** for invoices.

For more search options by record type, see Quick Search Screens.

Record Lists (grid icon)

Use **Record Lists** to browse records of the same type and open the one you want to review.

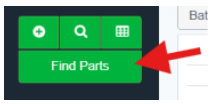
1. Click the **grid** button in the Quick Action Panel.
2. Select a record type, such as **Sales Orders**, **Invoices**, **Customers**, or **Items**. 1place opens the list screen for the selected record type.
3. Use the list's search field or available filters to narrow the results, if needed.
4. Click the record you want to open. For example, click a sales order in the **Sales Orders** list to open that sales order.



> **Keyboard shortcuts.** Press **Shift + F6** to open the Sales Orders list or **Shift + F7** to open the Invoices list.

Find Parts

Click **Find Parts** below the three icon buttons to open the Find Parts screen, where you can look up parts and check pricing. You can also press **F1** or **Ctrl + F1** to open it.



For a detailed guide on how to use the Find Parts screen, see How to find, price, and sell parts using the Find Parts screen.

Keyboard shortcut reference

Each menu shows the shortcut next to its corresponding option. For most record types, press **Ctrl** with the function key to start a new record, press the function key by itself to search, or press **Shift** with the function key to open the list.

Record or Screen	Add New Record	Search	Record Lists
Find Parts	Ctrl + F1	F1	—
Job / Jobs	Ctrl + F2	F2	Shift + F2
Customer	Ctrl + F3	F3	Shift + F3
Vendor	Ctrl + F4	F4	Shift + F4

Record or Screen	Add New Record	Search	Record Lists
Quote	Ctrl + F5	F5	Shift + F5
Sales Order	Ctrl + F6	F6	Shift + F6
Invoice	Ctrl + F7	F7	Shift + F7
Credit Memo	Ctrl + F8	F8	Shift + F8
Purchase Order	Ctrl + F9	F9	Shift + F9
Item	Ctrl + F10	F10	Shift + F10
Task	Ctrl + F11	F11	Shift + F11
Jobs	Ctrl + F12	F12	Shift + F12