



Step 2.3 – Navigating your Mobile Scanner

Getting Started with OrderDog > Step 2 - Mobile Scanner

This tutorial picks up where the last tutorial (Step 2.1 – Setting up your Mobile Scanner) left off.

This guide will teach you the very basics of navigating your mobile scanner. If you seek a tutorial on a more specific process, please reference our Online Knowledge Base and its growing library of tutorials for assistance.

This tutorial is best understood by following along on your mobile scanner. Go ahead and log in to the ODSscanner app where you'll be greeted by the homepage.

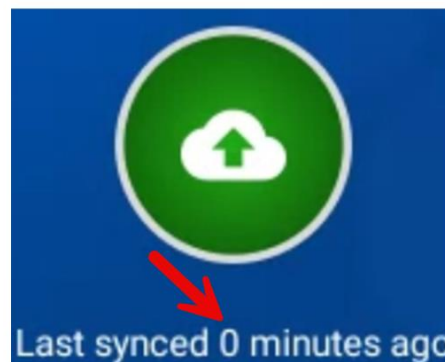
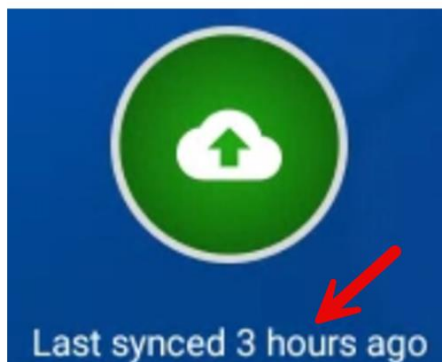
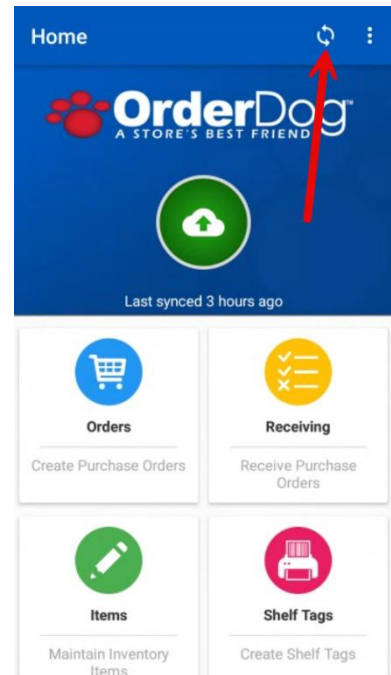
Syncing Your Scanner and When to Do It

The first and most important part of using your scanner is making sure it is always in sync with your other devices, like your Point of Sale and the OrderDog portal.

Your scanner will automatically sync from time to time, but if you have just made a change on the portal or your point of sale, your scanner may not accurately reflect these changes until you have manually synced your scanner, or until your scanner does an automatic sync.



1. To do a manual sync, click the cycling arrows icon in the top right corner of the screen.
2. Wait for the sync to finish. You should be pulled back to the ODSscanner homepage.
3. To check the last time that the scanner has been synced, check the message below the green button in the top center of the screen. It will say "Last synced (x) minute(s) ago".



An automatic sync will occur upon starting up your scanner if you have just started it back up from being powered off. Automatic syncs also occur every 8 hours after your last sync.

Homepage

Depending on your service level, you could have up to 6 different processes available to you on your homepage:



- **Orders:** This is where you can scan items to create purchase orders and upload them to the portal for sending them off to vendors.



- **Receiving:** This is where you can receive purchase orders that you sent through the portal and which have been fulfilled by the vendors. You can also create your own receiving document on orders sent outside of OrderDog.



- **Items:** This is where you can scan items and edit item information, such as price, discounts, and more.



- **Shelf Tags:** This is where you can scan items and generate a listing of shelf tags you want to print. Once you upload them to the portal, you can print them from there.



- **Inventory Adjustments:** This is where you can scan items and adjust their on hand quantities.

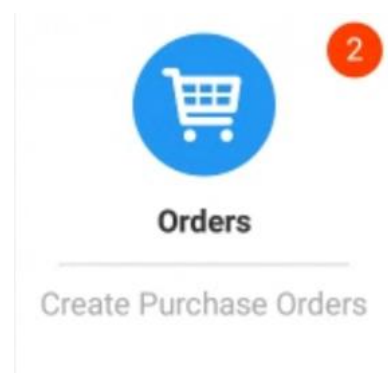


- **Inventory:** This is where you can scan items and do a physical inventory record.

Pending Work Statuses

Anytime you create a record of one of these processes for upload, you will get a red notification dot with a number inside of it, indicating the number of records that can be uploaded from their corresponding process.

For navigation purposes, we'll go ahead and press the "Orders" process to see the general setup for each page.



Summary Screen

The first screen for each process is the summary screen.

In the top lefthand corner is a back arrow. Every page except for the homepage will have a back arrow for navigating between pages.



Lastly, there is a blue “+” button in the bottom right corner of the screen. This button will take you to the next screen, which is the “Ready to Scan” screen.

After scanning in items or records for one of the processes, you will see a list of every item or record you have scanned on this page. This page functions as a place to review and edit the details of all of your items and records on this page. Editing the quantities of items/records will be covered in a later section.

If you need to add more items/records to your order or other process, simply press the blue “+” button to go back to scanning and inputting details as you need to.

Items	Groups
Bluebonnet	
1 Item	\$57.40
Nordic Naturals	
1 Item	\$77.85

Go ahead and press “+” now so we can take a look at the “Ready to Scan” screen.

Ready to Scan Screen

On this screen, you can scan individual items to start creating orders for them, editing their information, etc., depending on which process you are going through.



Scanning

You can scan in the items, or you can use the icon which depicts a magnifying glass on a barcode to manually search for an item using its UPC code.



Entering Quantities

Most processes will have you put in a specific quantity for the item you just scanned.



You can change the quantity in a number of ways:

- Press the “+” or “-” button to edit the quantity.
- Tap on the number and manually enter the number on the touchscreen keyboard that appears. Just be sure to press the checkmark to confirm your changes to the quantity.
- Continue scanning the same item to increase the quantity.



Everything Autosaves

When you are ready to scan the next item, you don't need to do anything but scan the next item or manually input the UPC of the next item you wish to view. OrderDog automatically saves your progress as you go, so as long as you input a quantity bigger than zero, then your items will be saved.



Grouping

The grouping icon is found at the top, which is a big circle with 3 little circles inside of it. Here, you can enter in a group name to create a new group and scan items under than group or change the group you are scanning under. If you wish to use groups, you should first select the group, and then scan the item that belongs in that group. When changing groups, you will do the same. Change the group, and then scan the next item that belongs in this group.



Deleting

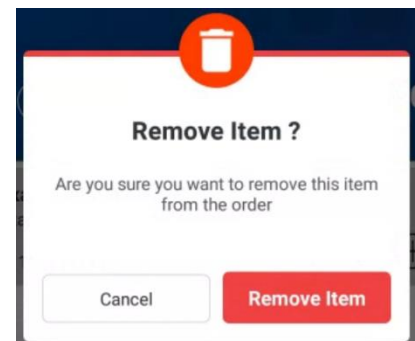
The last icon to cover is the trashcan. The trashcan will delete what's on the page you are currently viewing. Please note that the trashcan will apply to every item or record on the screen you are on. On the "Ready to Scan" page, it will delete the current item you are viewing off of the records for uploading. For a page with multiple records, it will delete every record that is on that page.

Detail Edit Per Item/Record Screen

Navigate to the summary screen by pressing the back arrow, and then click on an item/record you wish to look into. This subsection of the summary screen differs between processes, but here, you will be able to edit quantities for items scanned, view changes made to an item for item edits and even change those edits.

If you want to remove an item/record off of the list, you press the minus button until the quantity of the item is zero. This will prompt you to confirm if you want to remove the item or not, in which case, you would confirm this action by pressing "Remove Item", or press "Cancel" to keep it on the list. You can also make use of the trashcan on this page to delete every item on the page you are on as previously described.

When you are done editing your item records, press the back button to navigate back to the home screen.



Uploading to the Cloud

The green button with the arrow in the cloud is the upload button. Depending on which page you're on, the cloud button uploads everything on that page, similar to how the trashcan edits every item/record on the page you are on.



For instance, if you have orders you want to upload, shelf tags, and item edits, you can use the upload button on the homepage to upload all the orders, shelf tags, and item edits at once. Anything with a red notification mark will upload if you use the homepage upload button.

If you are on the Order Summary Screen, then pressing the upload button will upload all the orders you have on that screen, and so on and so forth with each page getting more specific as you tap into different sub-screens.

Congratulations!

You have successfully gone through the basics of the mobile scanner! If you seek a tutorial on a more specific process, please reference our Online Knowledge Base and its growing library of tutorials for assistance.

And of course, you may always contact customer support (contact information detailed below) for assistance.

Happy scanning, and with that...



YOU'RE DONE!

If you have any questions or concerns regarding this tutorial, or any other inquiries, please feel free to contact us at:

Email: support@orderdog.com

Call: 1-866-673-3736

Our hours: 8 AM – 6 PM CST

Monday – Friday

After Hours Support Available

Visit our website for more tutorials and resources:

<https://orderdog-inc.kayako.com/>

