

# OrderBase Mini Quick Reference



## GENERAL:

If you want to do this:	Here's how to do it:
POWER UNIT ON	Press the power key located in the lower right corner of the keypad.
SCROLL THROUGH THE MENU	Use the ▼ and ▲ keys to scroll through the menu.
SELECT AN OPTION FROM THE MENU	Press the corresponding number on the keypad, or use the ▼ and ▲ keys to scroll through the menu. Once the desired option is highlighted, press Enter.
USE THE ENTER KEY	Press the blue Enter button located to the right of the yellow scan button.
EXIT FROM A MENU OPTION	Press the ESC key. Continue to press ESC until you are back to the desired screen.
BACKSPACE AN ENTRY	Press the BS key.
SCAN AN ENTRY	Press the yellow scan button.
ENTER ALPHA CHARACTERS	Press the Fn/Alpha key located in the lower left corner of the keypad. To return to numeric entry, press the alpha key 3 times.
RETURN TO THE PREVIOUS SCREEN	Press the ESC button to go backwards one screen at a time.

## ORDER:

From the OrderBase Mini main menu, press option 1 to enter the Order menu.

If you want to do this:	Here's how to do it:
SELECT THE *NONE PO	Select option 1 (*NONE). Begin adding items, or press ESC to return to the Order menu.
CREATE A NEW PO	Select option 2 (New PO). Type the PO name and press Enter. Once the PO is named, you may begin adding items to it, or press ESC to return to the Order menu.
VIEW A LIST OF CURRENT PO'S	Select option 3 (PO(s)). A list of current POs will display. To select a PO, scroll through the list until the desired PO is highlighted; then press Enter. .
ADD ITEMS TO A PO	Select the desired PO. <ul style="list-style-type: none"> <li>▪ Enter items in the Item field by typing (item number or NDC) or by scanning (shelf label or UPC).</li> <li>▪ Press Enter to accept the default quantity of 1, or use the keypad to enter a different quantity and press Enter.</li> </ul>
CHANGE A PO # (DEFAULT IS *NONE)	Select option 4 (Maintenance). From the PO Maintenance screen: <ul style="list-style-type: none"> <li>▪ Select option 2 (Edit).</li> <li>▪ Use the ▼ and ▲ keys to scroll to the desired PO; then press Enter.</li> <li>▪ Type the new PO name and press Enter.</li> </ul>
CHANGE THE QUANTITY OF AN ITEM ON THE PO	Select option 4 (Maintenance). From the PO Maintenance screen: <ul style="list-style-type: none"> <li>▪ Select option 1 (View).</li> <li>▪ Use the ▼ and ▲ keys to scroll through the list of PO's. Once the desired PO is highlighted, press Enter.</li> <li>▪ Scroll through the PO until the desired item is displayed on the screen.</li> <li>▪ Use the keypad to change the quantity ordered; then press the Enter key to save the change.</li> </ul>
DELETE AN ITEM FROM THE PO	Select option 4 (Maintenance). From the PO Maintenance screen: <ul style="list-style-type: none"> <li>▪ Select option 1 (View).</li> </ul>

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	<ul style="list-style-type: none"> <li>Use the ▼ and ▲ keys to scroll through the list of PO's. Once the desired PO is highlighted, press Enter.</li> <li>Scroll through the PO until the item to delete is displayed on the screen. Press F1 (Alpha/FN+1) to delete the item.</li> </ul>
DELETE AN ENTIRE PO	<p>Select option 4 (Maintenance). From the PO Maintenance screen:</p> <ul style="list-style-type: none"> <li>Select option 3 (Delete).</li> <li>Use the ▼ and ▲ keys to scroll through the list of PO's. Once the PO to delete is highlighted, press Enter.</li> <li>From the Delete screen, press 1 (No) to cancel, or press 2 (Yes) to confirm the delete.</li> </ul>

## INVENTORY:

From the OrderBase Mini main menu, press option 2 to enter the Inventory menu.

If you want to do this:	Here's how to do it:
SELECT THE *NONE DEPARTMENT	Select option 1 (*NONE). Begin adding items, or press ESC to return to the Inventory menu.
CREATE A NEW DEPARTMENT	Select option 2 (New Dept). Type the department name and press Enter. Once the department is named, you may begin adding items to it, or press ESC to return to the Inventory menu.
VIEW A LIST OF CURRENT DEPARTMENTS	Select option 3 (DEPT(s)). A list of current departments will display. To select a department, scroll through the list until the desired department is highlighted; then press Enter.
ADD ITEMS TO A DEPARTMENT	<p>Select the desired department.</p> <ul style="list-style-type: none"> <li>Enter items in the Item field by typing (item number or NDC) or by scanning (shelf label or UPC).</li> <li>Press Enter to accept the default quantity of 1.0, or use the keypad to enter a different quantity (partial quantities are allowed) and press Enter.</li> </ul>
ADD USER-DEFINED ITEMS	<p>Select the desired department.</p> <ul style="list-style-type: none"> <li>Press F1 (Fn/Alpha+1) to enter the User Defined Items screen.</li> <li>To enter a non-numeric description, press the Fn/Alpha key to change the entry mode to Alpha.</li> <li>Use the keypad to enter the item description and press Enter.</li> <li>Press Enter to accept the default quantity of 1.0, or use the keypad to enter a different quantity (partial quantities are allowed) and press Enter.</li> <li>Enter the price for the item and press Enter.</li> </ul>
CHANGE A DEPT # (DEFAULT IS *NONE)	<p>Select option 4 (Maintenance). From the Department Maintenance screen:</p> <ul style="list-style-type: none"> <li>Select option 2 (Edit).</li> <li>Use the ▼ and ▲ keys to scroll to the desired department and press Enter.</li> <li>Type the new department name and press Enter.</li> </ul>
CHANGE THE QUANTITY OF A DEPARTMENT ITEM	<p>Select option 4 (Maintenance). From the Department Maintenance screen:</p> <ul style="list-style-type: none"> <li>Select option 1 (View).</li> <li>Use the ▼ and ▲ keys to scroll to the desired department and press Enter.</li> <li>Scroll through the department until the desired item is displayed on the screen, then use the keypad to change the quantity and press the Enter key.</li> </ul>
DELETE AN ITEM FROM A	Select option 4 (Maintenance). From the Department Maintenance screen:

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DEPARTMENT	<ul style="list-style-type: none"><li>▪ Select option 1 (View).</li><li>▪ Use the ▼ and ▲ keys to scroll to the desired department and press Enter.</li><li>▪ Scroll through the department until the item to delete is displayed on the screen.</li><li>▪ Press F1 (Alpha/FN+1) to delete the item.</li></ul>
DELETE AN ENTIRE DEPARTMENT	<p>Select option 4 (Maintenance). From the Department Maintenance screen:</p> <ul style="list-style-type: none"><li>▪ Select option 3 (Delete).</li><li>▪ Use the ▼ and ▲ keys to scroll to the department to delete and press Enter.</li><li>▪ From the Delete screen, press 1 (No) to cancel, or press 2 (Yes) to confirm the delete.</li></ul>

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## TRANSMIT:


From the OrderBase Mini main menu, press option 6 to enter the Transmit menu.

- *Before transmitting, make sure the OB Mini device is securely seated in its cradle.*
- *The OrderBase Transmission Assistant used to transmit this data should have been configured at the time of installation following the instructions contained within the OrderBase Transmission Assistant Installation document.*
- *Depending on the Host configuration option selected when configuring the Transmission Assistant, Orders, Inventory, Returns and Labels will either be transmitted directly to H. D. Smith or will be staged in OrderBase Xpress first to allow viewing/editing prior to transmitting. (Retails will be transmitted directly to H. D. Smith regardless of the Host configuration option selected.)*
- *Depending on the Destination configuration option selected when configuring the Transmission Assistant, once the transmission is complete, the report will either display to your screen or print on your printer.*
- *For assistance changing the Transmission Assistant configurations, refer to the Transmission Assistant notes towards the end of this section.*
- *If errors are encountered during the data transmission, refer to Troubleshooting Transmission Errors at the end of this section.*

If you want to do this:	Here's how to do it:
TRANSMIT ALL	Select option 1 (All). This option transmits Orders, Inventory, Labels, Returns, and Retails. Once the transmission is complete, the message "Transmit Complete" will display on the OB Mini screen.
TRANSMIT ORDERS	Select option 2 (Orders) to transmit only Orders. Once the transmission is complete, the message "Transmit Complete" will display on the OB Mini screen.
TRANSMIT INVENTORY	Select option 3 (Inventory) to transmit only Inventory. Once the transmission is complete, the message "Transmit Complete" will display on the OB Mini screen.
TRANSMIT LABELS	Select option 4 (Labels) to transmit only Label (shelf and price) orders. Once the transmission is complete, the message "Transmit Complete" will display on the OB Mini screen.
TRANSMIT RETURNS	Select option 5 (Returns) to transmit only Return Authorizations. Once the transmission is complete, the message "Transmit Complete" will display on the OB Mini screen.
TRANSMIT RETAILS	Select option 6 (Retail) to transmit only Retail Price changes. Once the transmission is complete, the message "Transmit Complete" will display on the OB Mini screen.

### Transmission Assistant:

The OrderBase Transmission Assistant is used to transmit the data from the OrderBase Mini device to H. D. Smith. How the Transmission Assistant is configured will determine how your data is transmitted and displayed. If not configured when installed, the Transmission Assistant will need to be configured prior to transmitting for the first time.

To configure the Transmission Assistant, double-click the Transmission Assistant icon  on your status bar. The OrderBase Transmission Assistant window will display. Refer to the table below for the configuration options.

Setting:	Configuration Options:
HOST	<p>This setting determines whether the data transmits directly to H. D. Smith or is staged in OrderBase Xpress.</p> <ul style="list-style-type: none"> <li>▪ To transmit directly to H. D. Smith, set this to Direct.</li> <li>▪ To stage your Orders, Labels, Inventory and Returns in OrderBase Xpress, set this to OrderBase Xpress. (Retails will transmit directly to H. D. Smith regardless of the</li> </ul>

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	<p>setting.) If staged in OrderBase Xpress, the notation “STAGED” will display directly under the UserName on the transmission report.</p> <ul style="list-style-type: none"> <li>▪ The OrderBase option is not available at this time. Do not choose this setting.</li> </ul>
DEVICES	<p>This setting determines whether the device set to transmit is the OB Mini or the MSI.</p> <ul style="list-style-type: none"> <li>▪ If transmitting using the OB Mini device, set this to OBMINI.</li> <li>▪ If transmitting using the MSI device, set this to MSI.</li> <li>▪ To change this setting, click the drop-down arrow next to the device field, then select the desired option.</li> <li>▪ Once the desired option is displayed in the device field, click the LOAD button located to the right of the device field. The device that is currently set to transmit will display beside “Current Device.”</li> <li>▪ Leave the COM port associated with the device set to the default. This should not require changing.</li> </ul>
DESTINATION	<p>This setting determines whether the transmission report displays to the screen or prints to a printer.</p> <ul style="list-style-type: none"> <li>▪ To display on the screen, set this to Display.</li> <li>▪ To print to a printer, set this to Direct to a Printer. Then use the drop-down arrow beside the printer field to select a printer.</li> </ul>
CREDENTIALS	<p>This setting determines the account number, user name and password associated with the data being transmitted.</p> <ul style="list-style-type: none"> <li>▪ If the Credentials settings are left blank, the user will be prompted to enter the account number, user name, and password into a pop-up window at each transmission.</li> <li>▪ If you do not want to be prompted at each transmission, enter your account number, user name and password in the appropriate credentials field. Then check the “Use as default” box. These credentials will be used each time you transmit to create a seamless transmission.</li> </ul>

## Troubleshooting Transmission Errors:

After a successful transmission, the message “Transmit Complete” will display on the OB Mini device screen. If an error message displays instead, refer to the table below to resolve the error.

Message:	Action:
NO DATA TO TRANSMIT	This message displays when there is no data on the OB Mini device. You must add data prior to transmitting.
TRANSMIT ERROR	<p>This message displays when the OB Mini device is unable to complete the data transmission. Verify the OB Mini device is securely seated in its cradle and transmit again. If the Transmit Error displays again, follow the steps below.</p> <ul style="list-style-type: none"> <li>▪ Right-click the Transmission Assistant icon on your status bar, then select Close. Verify the icon is gone from the status bar.</li> <li>▪ Unplug the OB Mini docking station’s power and USB cords.</li> <li>▪ Plug in the OB Mini docking station’s power and USB cords.</li> <li>▪ Double-click the Transmission Assistant icon on your desktop. This will place the Transmission Assistant icon back on your status bar.</li> <li>▪ Open the Transmission Assistant from the status bar and verify the configuration settings.</li> <li>▪ Cradle the device and transmit again.</li> </ul>

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## **CLEAR:**

From the OrderBase Mini main menu, press option 7 to enter the Clear menu.

<b>If you want to do this:</b>	<b>Here's how to do it:</b>
CLEAR ALL	Select option 1 (All). The message "Delete All?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from all functions. This also clears any user created PO or Inventory names.
CLEAR ALL DATA	Select option 2 (All Data). The message "Delete All?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from all functions but leaves any user created PO or Inventory names available for future use.
CLEAR ORDERS	Select option 3 (Orders). The message "Delete Orders?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from all purchase orders but leaves any user created PO names for future use.
CLEAR INVENTORY	Select option 4 (Inventory). The message "Delete Inventory?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from all departments but leaves any user created department names available for future use.
CLEAR LABELS	Select option 5 (Labels). The message "Delete Labels?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from the Labels order.
CLEAR RETURNS	Select option 6 (Returns). The message "Delete Returns?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from the Return function.
CLEAR RETAILS	Select option 7 (Retail). The message "Delete Retail?" will display. Press 1 (No) to cancel, or press 2 (Yes) to confirm. This clears all data from the Retail function.