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- Is the information clear?
- Are the examples correct?
- Do you need more examples?
- What did you like most about this document?

Click here to send us your comments. If possible, please provide a page number or section title to identify the content you're describing.

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</table>
Order Guides

Order guides are predefined lists of items that customers can order on a regular basis. Order guides enable you to add any or all of the predefined items in bulk to a sales order.

Using the Order Guides SuiteApp, you can create an order guide per customer or a template that you can assign to multiple customers. You can create an order guide for a group of customers, such as pizza restaurants. You can then add the list of items, like flour and cheese, which the customers may order on a regular basis. For each customer, you can further customize the list by adding more items based on recent orders. On sales orders, you can use one order guide at a time to add the items. However, you can edit the sales order to use another order guide.

You can add the following item types in order guides:

- Assembly items
- Lot numbered assembly items
- Serialized assembly items
- Inventory Items
- Lot numbered inventory items
- Serialized inventory items
- Non-inventory items for sale
- Non-inventory items for resale
- Kit/Package items

For details on item types, refer to the topic Item Types.

Installing Order Guides

Only users with the Administrator role or the SuiteBundler permission can install the SuiteApp. Following are the bundle details:

- Bundle Name: PSG F&B Order Guides
- Bundle ID: 275880
- Availability: Public

For more information on installing a bundle, see the help topic Installing a Bundle.

Order Guides is a managed SuiteApp that is automatically updated whenever enhancements or new features are added.

Prerequisites

The Order Guides SuiteApp has been developed and tested for use primarily with NetSuite OneWorld.

The following features are required to use order guides. To enable the features:

1. Go to Setup > Company > Enable Features.
2. Check the boxes next to all the features listed in the following table.
Installing Order Guides

<table>
<thead>
<tr>
<th>Subtab on Enable Features Page</th>
<th>Feature Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>• Multiple Units of Measure</td>
</tr>
<tr>
<td></td>
<td>• Multiple Prices</td>
</tr>
<tr>
<td>Analytics</td>
<td>SuiteAnalytics Workbook</td>
</tr>
<tr>
<td>Web Presence (To give access to Customer Center role)</td>
<td>• Customer Access</td>
</tr>
<tr>
<td></td>
<td>• Online Ordering</td>
</tr>
<tr>
<td>SuiteCloud</td>
<td>• Custom Records</td>
</tr>
<tr>
<td></td>
<td>• Client SuiteScript</td>
</tr>
<tr>
<td></td>
<td>• Server SuiteScript</td>
</tr>
</tbody>
</table>

3. Click Save.

Browsers Supported for Order Guides

The Order Guides SuiteApp has been tested on the following browsers and operating systems. However, it supports all browsers mentioned in Supported Browsers for NetSuite. In case you face issues with other browsers supported by NetSuite, contact NetSuite Support. The issues will be taken up on case-by-case basis.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Platform</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer 11*</td>
<td>Windows 10</td>
</tr>
<tr>
<td>*OpenAir is not supported</td>
<td></td>
</tr>
<tr>
<td>Google Chrome 77</td>
<td>Windows 10</td>
</tr>
<tr>
<td>Mozilla Firefox 60</td>
<td>Windows 10</td>
</tr>
<tr>
<td>Microsoft Edge 42.17134.1.0</td>
<td>Windows 10</td>
</tr>
</tbody>
</table>

Creating or Customizing Roles to Use Order Guides

If you are an administrator, you can create new roles or customize roles to add permissions for using order guides. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

Refer to the following table for minimum access levels for different record types required to use order guides.

<table>
<thead>
<tr>
<th>Record</th>
<th>Minimum Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transactions &gt; Sales Order</td>
<td>Edit</td>
</tr>
<tr>
<td>Lists &gt; Customer</td>
<td>View</td>
</tr>
<tr>
<td>Lists &gt; Documents and Files</td>
<td>View</td>
</tr>
<tr>
<td>Lists &gt; Items</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record &gt; Brands</td>
<td>View</td>
</tr>
<tr>
<td>Record</td>
<td>Minimum Access Level</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Custom Record &gt; Customer Group Record</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record &gt; Customer Item Mapping</td>
<td>Full</td>
</tr>
<tr>
<td>Custom Record &gt; Customer Order Guide</td>
<td>Full</td>
</tr>
<tr>
<td>Custom Record &gt; Items Group</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record &gt; Order Guide Item</td>
<td>Full</td>
</tr>
<tr>
<td>Custom Record &gt; Order Guide Template</td>
<td>View</td>
</tr>
<tr>
<td>Customer Record &gt; Packs Size</td>
<td>View</td>
</tr>
</tbody>
</table>

Adding Center Tab and Center Category

For the custom role, you will have to add the Order Guide tab to the navigation bar and Order Guide Template menu within the Order Guide tab. To achieve this, you will have to create a center tab, a center category, and links within the category. Use the following information when creating the center tab and center category:

- Label — Order Guide
- Label in the Categories sublist of the Content subtab — Order Guide Template

For more information on creating a center tab, see the help topic Creating Center Tabs.

Next, you will have to add links to the Order Guide Template category. Use the following information to add the links:

- For View level access to Order Guide Template, add link to Order Guide List Page and label it as List.
- For Create, Edit, or Full level access to Order Guide Template, add the following links:
  - Order Guide Create Page — Label the link as New.
  - Order Guide List Page — Label the link as List.

For more information on creating center links, see the help topic Creating Center Links.

Setting Up Order Guides

Prior to using the Order Guides feature, you can set up record entries, item records, and saved searches, based on your business requirements.

See the following topics:

- Creating Order Guide Record Entries
- Setting Up Item Records for Order Guides
- Defining Item Saved Searches for Order Guides

Creating Order Guide Record Entries

Order guides reference the fields added by the Order Guides feature on item and customer records. You can add entries or values to the list in these fields:
Setting Up Order Guides

- **Item Group** - An item group for order guides consists of items that customers order together. For example, you can create a group of items ordered by customers to create pizza. On item records, you can assign these groups to items.
- **Pack Size** - Pack sizes specify the quantity and unit of measure for the item in a pack.
- **Brand** - The brand of an item.

**To create order guide record entries:**

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. On the Record Types page, click **New Record** in the row for one of the following records:
   - Brands
   - Items Group
   - Packs Size
   Refer to the description of the customer and item fields associated with these records in the topic overview.
3. On the record page, in the **Name** field, enter a name for the record.
   This name appears as an entry in the list for the corresponding field on an item or customer record.
4. Click **Save**.
   To view the list of entries for a record, click **List** at the upper right corner of the page.
   For detailed instructions on creating and viewing entries, see the help topic Using Custom Record Entries.

Setting Up Item Records for Order Guides

On item records, you must set the following fields required to add the items to an order guide:

- **Base Price** - If absolute price is defined in the customer record, then that price is considered as the default current price. If absolute price is not defined, then base price from item record is considered as default current price. Price defined in any other price level is not considered for adding items to order guides.
  For more information about absolute price, see the help topic Absolute Pricing for Customers.
- **Display in Web Store** - Makes items available to customers who want to create their own order guides.

**To set up item records for order guides:**

1. Create or edit an item record by doing one of the following:
   - To create an item record, go to Lists > Accounting > Items > New.
   - To edit an item record, go to Lists > Accounting > Items, and then click **Edit** next to the item you want to update.
2. On the Item page, on the **Sales/Pricing** subtab, enter the base price for one or more currencies.
   For more information, see the help topic Setting Up Items for Multiple Price Levels.
3. On the **Web Store** subtab, check the **Display in Web Store** box.
   For more information, see the help topic Setting Up Items for the Web Site.
4. Optionally, on the **Order Guide** subtab, you can set up additional item fields:
- **Manufacturer Product #** - Enter the manufacturer product number of the item.
- **Brand** - Select the brand of the item.
- **Order Guide Item Group** - Select the item group that you want to associate with the item.
- **Order Guide Pack Size** - Select the default pack size for the item.

These fields are displayed in the item sublist of order guides. For more information, see [Creating Order Guide Record Entries](#).

5. Click **Save**.

### Defining Item Saved Searches for Order Guides

You can create item saved searches to search for specific items that you want to add to order guides. The Order Guides feature provides default item saved searches that you can use as reference:

- **Invoiced Items Last Month** - Retrieves items from invoice and cash sale transactions created last month.
- **Invoiced Items Last Week** - Retrieves items from invoice and cash sale transactions created last week.

These saved searches are available only for order guides created from a customer record, not from a template. To access these saved searches, go to Lists > Search > Saved Searches.

**Note:** When using an item saved search in an order guide, you can add only the first 1000 items retrieved from the search.

### To define item saved searches for order guides:

1. Go to Lists > Search > Saved Searches > New.
2. On the New Saved Search list page, select **Item**.
3. On the Saved Item Search page, do the following:
   a. In the **Search Title** field, enter a unique title for the saved search.
   b. In the **ID** field, enter a unique identifier for the saved search.
   c. Check the **Public** box.
4. On the **Criteria** subtab, set the filters that you want to apply when searching for the items.

Refer to the sample settings in the saved search, Invoiced Items Last Month:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Created</td>
<td>Operator: after Selector: same day last month</td>
<td>Includes all transactions created after the same day of the previous month</td>
</tr>
<tr>
<td>Transaction fields</td>
<td>Operator: any of Selector: none</td>
<td>Excludes all transactions that are not from parent customers</td>
</tr>
<tr>
<td>Transaction Filter: Customer Sub of</td>
<td>Operator: invoice</td>
<td>Includes all invoice transactions only</td>
</tr>
<tr>
<td>Transaction Filter: Type</td>
<td>Operator: any of Selector: Cash sale</td>
<td>Includes all cash sales transactions</td>
</tr>
</tbody>
</table>
5. On the **Results** subtab, add the following columns: Name, Display Name, Description, Type, Base Price, Brand (Custom), and Order Guide Pack Size (Custom).

In order guides, items are retrieved along with these details and displayed in the item sublist. If you want to add more settings to your saved search, see the help topic **Defining a Saved Search** for detailed instructions.

6. Click **Save**.

## Creating Order Guides

You can create an order guide from a customer record or create a template that you can assign to multiple customers. Order guides created from a customer record cannot be assigned to other customers. Using a template generates separate guides for each customer.

### Best Practices for Creating Order Guides

The following are the best practices for order guides:

- When creating order guide templates, NetSuite recommends that you assign up to 50 customers at a time. You can edit a template if you want to assign more customers.
- When adding items to the order guide, NetSuite recommends that you add up to 200 items in an order guide. If you have more than 200 items, add them in separate order guides.

#### To create order guides from a customer record:

1. Go to Lists > Relationships > Customers.
2. From the list of customers, click **View** for the customer you want to assign to the order guide.
3. On the Customer page, click **Create Order Guide**.
4. On the Order Guide page, in the **Name** field, enter a unique name for the order guide.
5. Optionally, check the **Default** box to assign this guide as a default for the customer.

   **Note:** On a transaction, items of a default order guide are preloaded when you open the Order Guide Entry popup window. For more information, see Using Order Guides on Transactions.

6. Optionally, check the **Historical** box to assign this guide as historical for the customer.
7. Add items to the order guide by doing either or both of the following:
   - In the **Item Search** field, select an item group or item saved search to retrieve multiple items.
     
     **Note:** If more than 15 items are retrieved from the search, NetSuite first automatically saves the order guide. Then, the order guide opens in Edit mode and the items display in the sublist.
   - On the **Items** subtab, in the **Item Code** field, select the item from the list, and then click **Add**.

To review the conditions for items that you can add to order guides, see **Order Guides**.

8. Optionally, enter a default item quantity for orders from the customer.
9. Click **Save**.

On a customer record, you can view the list of guides on the **Order Guides** subtab.
To create order guide templates:

2. On the Order Guide Template page, in the Name field, enter a unique name for the order guide.
3. To add customers, in the Customer field, do one of the following:
   - From the list, click the customer name.
   - To create a customer record, click New from the list or click the new icon to open the Customer popup window.
4. To add items to the order guide, do either or both of the following:
   - In the Item Search field, select an item group or item saved search to retrieve multiple items.
   - On the Items subtab, in the Item Code field, select the item from the list, and then click Add.

   Note: If more than 15 items are retrieved from the search, NetSuite automatically saves the items first before displaying them in the sublist.
5. Optionally, enter a default item quantity for orders from the selected customers.
6. Click Save.

For templates assigned to one or more customers, separate order guides are generated for each customer. In this case, the order guide’s internal ID appended to the name of each customer’s order guide. To view and update the generated guide per customer, go to the Order Guide subtab on the customer’s record. For information about updating guides, see Editing Order Guides.

Editing Order Guides

You can edit a customer’s order guide to add items, set a default order guide, or set a historical order guide. You can also edit order guide templates.

Editing Order Guides Per Customer

On a customer’s record, go to the Order Guide subtab, and then click Edit next to the order guide that you want to update. You can add or remove items from the guide, as well as set it as the default guide for the customer.

Note the following guidelines when editing order guides:
- You can edit or remove the items. These changes do not affect existing transactions where you had used the guide.
- Updating a customer’s guide does not change the template used to generate the guide.
- See Creating Order Guides for instructions on how to create guides from a customer record.

Editing Order Guide Templates

To access an order guide template, go to Order Guide > Order Guide Templates > List. On the Order Guide Templates page, click Edit next to the order guide that you want to update.
Aside from the guidelines for order guides per customer, you can refer to additional guidelines specific to templates:

- Updating an order guide template does not overwrite the settings and contents of guides generated from the template.
- Every time you update a template, you generate an instance of the guide only for the selected customers. The changes are not applied to previously assigned customers that you did not select on the updated template.
- See Creating Order Guides for instructions on how to create order guide templates.

Deleting Order Guides

In edit mode, you can delete order guides by clicking Delete on a customer's order guide or a template. You cannot retrieve deleted order guides.

Items Filtering Criteria

Items can be added to order guides only if they satisfy certain criteria. This section lists the required criteria during each transaction.

In the Order Guide Template page, you can add only the items that satisfy the following criteria to the transaction:

- Items that have the Display in Web Store box checked
- Items that are not inactive

When creating an order guide for a customer from the Create Order Guide page, you can add only the items that satisfy the following criteria:

- Items that have the Display in Web Store box checked
- Items that have a base price or absolute price defined in the default currency of the customer
- Items that are not inactive

When creating an order guide for a customer from the Order Guide Template page, you can add only the items that satisfy the following criteria:

- Items that have the Display in Web Store box checked
- Items that have a base price or absolute price defined in the default currency of the customer
- Items that are not inactive

In the Order Guide Entry popup window, you can add only the items that satisfy the following criteria to the transaction:

- Items that have a base price or absolute price defined in the default currency of the customer
- Items that have quantity greater than zero
- Items that are not inactive

Working with Historical Order Guide

A historical order guide stores the list of items a customer had ordered in the past. This list can be helpful while creating a sales order, wherein you can reference all the items ordered by the customer.
Guidelines for Historical Order Guide

Following are some guidelines for working with historical order guides:

- You can mark any order guide as a historical order guide.
- At any time, you can have only one historical order guide for a customer.
- You can mark the same order guide as historical as well as default order guide.
- If you inactivate a historical order guide, it does not store items ordered by the customer.
- You can create a historical order guide even if you do not have any items in it.

Marking an Order Guide as Historical

On the Order Guide page, you can use the **Historical** box to mark the order guide as historical.

To mark an order guide as historical:

1. On a customer record, go to the **Order Guide** subtab.
2. Click **Edit** next to the order guide that you want to mark as historical.
3. Check the **Historical** box.
4. Click **Save**.

**(Note:** If there is an existing order guide with the Historical box checked, then that box will be cleared automatically.**

Adding Items to Historical Order Guide

Items ordered by the customer are automatically added to the historical order guide using a map/reduce script. The script name is Historic Order Guide MR. The script considers the following to update the historical order guide:

- Sales orders created after the last script run
- Items that are not already included in the historical order guide

The script is by default scheduled to run every 24 hours. When the script runs for the first time, the SuiteApp includes only the sales orders that are created after it was installed. For information on scheduling the script, see the help topic **Scheduling a Map/Reduce Script Submission**.

You can also add items to historical order guide manually.

Using Order Guides on Transactions

You can use one order guide at a time to add the items to the sales order transaction. However, you can edit the sales order to use another order guide. You can specify the quantity and price of the items before adding them to the transaction.

To use order guides on transactions:

1. Create or edit a sales order by doing one of the following:
To create a sales order, go to Transactions > Sales > Enter Sales Orders.

To edit a sales order, go to Transactions > Sales > Enter Sales Orders > List, and then click Edit next to the transaction that you want to update.

2. On the sales order page, in the Customer field, select the customer.

3. Click Order Guide.


**Note:** If the customer has a default order guide, NetSuite preloads the items from that guide. For more information about default guides, see Creating Order Guides.

This displays the list of items from the order guide.

5. On the Order Guide Item Details subtab, in the Quantity column, enter the quantity of your order, and then click Update.

**Tip:** To search a column, click the find icon beside the column header to display the Search field. As you enter keywords in the Search field, you can view the results in the items sublist.

**Tip:** You can use certain keys to navigate and edit the fields in the order guide. See Keyboard Shortcuts for Order Guides.

Repeat this step for each item that you want to add to the transaction.

6. Optionally, you can enter additional details for each item:

   - In the Current Price column, enter the price for the item, and then click Update.
     On the transaction, item amounts are calculated automatically based on the current price and quantity.
   - In the UOM column, select the unit of measure, and then click Update.

7. After updating the items, click Save.

For detailed instructions on creating sales order transactions, see the help topic Creating Sales Orders.

### Keyboard Shortcuts for Order Guides

You can use the following keyboard shortcuts to edit items in the order guide:

<table>
<thead>
<tr>
<th>Key name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter</td>
<td>Enables editing or saving of updates in the currently selected row</td>
</tr>
<tr>
<td>Tab</td>
<td>Moves the cursor to the next button or editable field</td>
</tr>
<tr>
<td>Up Arrow</td>
<td>Moves the cursor to the previous row</td>
</tr>
<tr>
<td>Down Arrow</td>
<td>Moves the cursor to the next row</td>
</tr>
<tr>
<td>Esc</td>
<td>Cancels the updates in the currently selected row</td>
</tr>
</tbody>
</table>