

## EDIT AND MANAGE ITEMS IN YOUR CUSTOM ORDER GUIDE

This guide walks you through how to update and manage items in your Custom Order Guide. You will learn how to remove or hide items so your guide only includes the products you actively use.

Keeping your Custom Order Guide organized helps you:

Reduce ordering errors

Save time during order entry

Keep inactive or discontinued items out of view

Maintain a clean, streamlined list tailored to your operation

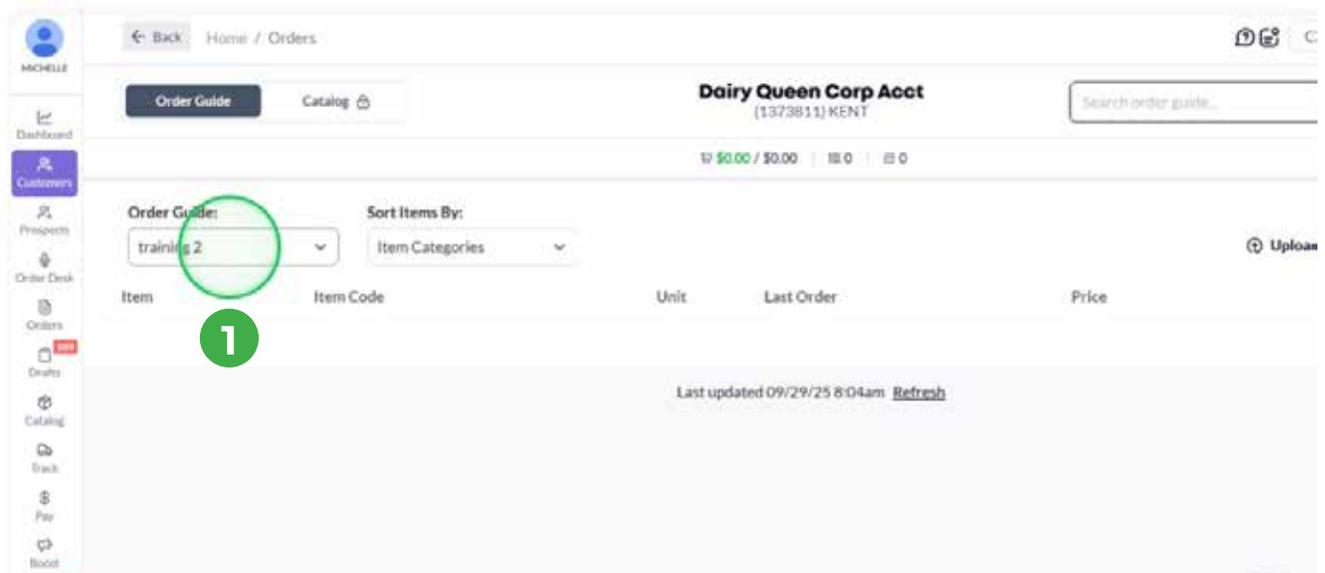
### 1 Access Your Custom Guide

Log in to the **K360 Sales Portal**.

From the main dashboard, select **Order Guides**.

Locate and select your **Custom Guide** from the list.

**Tip:** *If you have multiple guides, confirm you are selecting the correct one before making any changes.*



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## 2 Open the Custom Guide

From the **Order Guides** list, click on the custom guide you want to edit.

Once selected, the guide will open and display all items currently assigned to it.

**Tip:** Double-check the guide name before making changes to ensure you're editing the correct list.

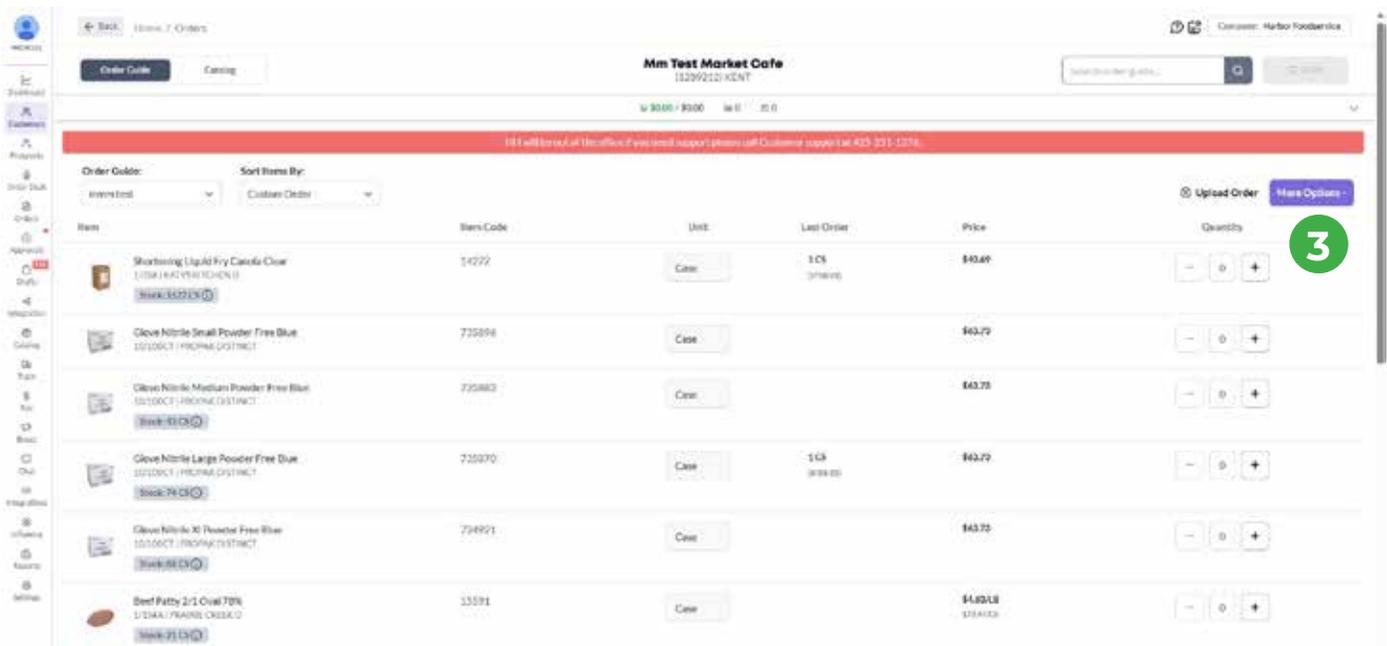


## 3 Select More Options

Within your custom guide, click **More Options**.

This menu allows you to manage and edit the items within your guide.

**Tip:** The *More Options* button is typically located in the upper-right area of the guide screen.





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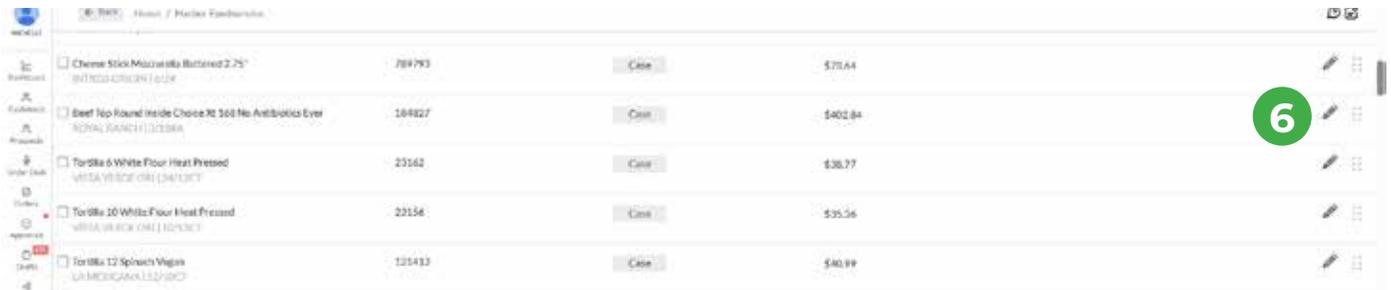
## 6 Click the Edit (Pencil) Icon

Locate the item you want to update.

Click the Edit (pencil) icon to the right of the item.

This opens the item settings, where you can make changes to how the item appears in your custom guide.

**Tip:** Always confirm you are editing the correct item before saving any updates.



Item Name	Item Code	Unit	Price	Actions
Cheese Stick Mozzarella Battered 2.75" INTLSD ORIGIN   6/28	789793	Case	\$70.64	[Edit] [More]
Beef Top Round Inside Choice XI 168 No Antibiotics Ever ROYAL RANCH   3/18FA	184827	Case	\$402.84	[Edit] [More]
Tortilla 6 White Flour Heat Pressed VESTA VERDE ORI   24/12CT	23162	Case	\$38.77	[Edit] [More]
Tortilla 10 White Flour Heat Pressed VESTA VERDE ORI   10/12CT	23156	Case	\$35.56	[Edit] [More]
Tortilla 12 Spinach Vegan LA MEXICANA   12/10CT	121413	Case	\$40.99	[Edit] [More]

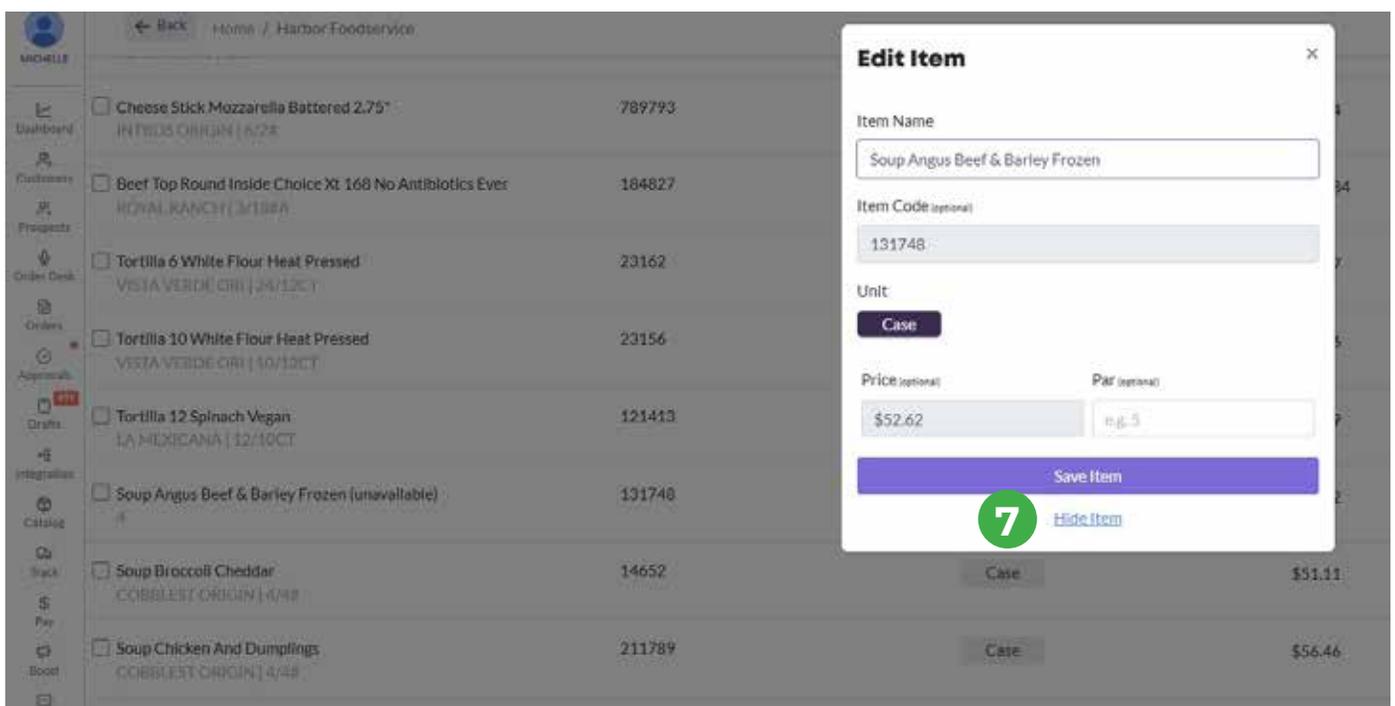
## 7 Select "Hide Item" (Removes the Item from Your Guide)

In the item edit window, click **Hide Item**.

In K360, selecting Hide Item removes the item from displaying in your custom order guide.

**Best Practice:** If you need the item again in the future, you can search by Hidden Items and add it back to your guide. This allows you to clean up your guide without permanently losing access to the item.

Keeping your guide updated helps ensure faster order entry and a more organized ordering experience.



**Edit Item**

Item Name: Soup Angus Beef & Barley Frozen

Item Code (optional): 131748

Unit: Case

Price (optional): \$52.62 PAF (optional): e.g. 5

Buttons: Save Item, Hide Item

Item Name	Item Code	Unit	Price
Cheese Stick Mozzarella Battered 2.75" INTLSD ORIGIN   6/28	789793		
Beef Top Round Inside Choice XI 168 No Antibiotics Ever ROYAL RANCH   3/18FA	184827		
Tortilla 6 White Flour Heat Pressed VESTA VERDE ORI   24/12CT	23162		
Tortilla 10 White Flour Heat Pressed VESTA VERDE ORI   10/12CT	23156		
Tortilla 12 Spinach Vegan LA MEXICANA   12/10CT	121413		
Soup Angus Beef & Barley Frozen (unavailable)	131748		
Soup Broccoli Cheddar COBBLEST ORIGIN   4/8	14652	Case	\$51.11
Soup Chicken And Dumplings COBBLEST ORIGIN   4/8	211789	Case	\$56.46

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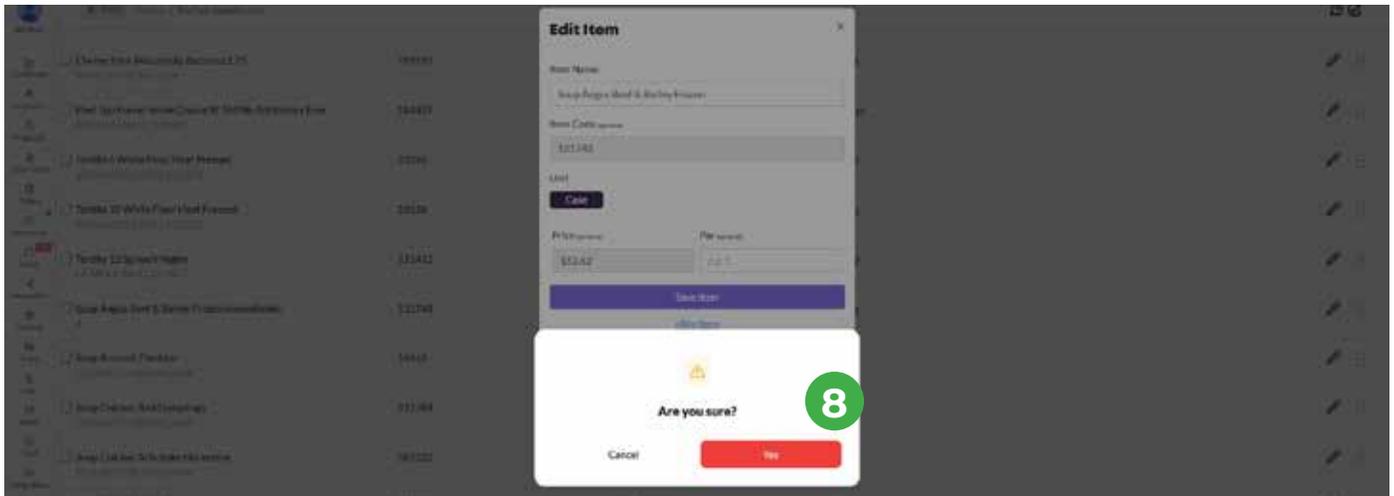
### 8 Confirm by Clicking “Yes”

After selecting **Hide Item**, a confirmation message will appear.

Click **Yes** to confirm.

Once confirmed, the item will be removed from displaying in your custom order guide.

**Tip:** Always review the item name in the confirmation message to ensure you are removing the correct product before clicking Yes.



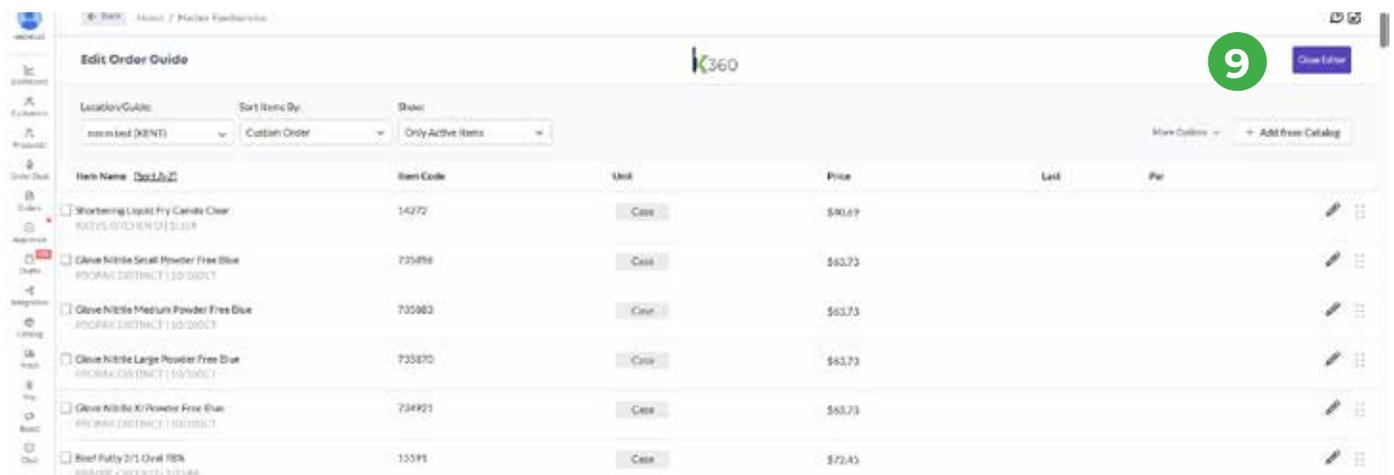
### 9 Close the Editor (Saves Your Changes)

After you have completed all updates, click **Close Editor**.

This step is important because clicking Close Editor saves all of your changes. If you exit without closing the editor properly, your updates may not be retained.

**Best Practice:** Before closing, quickly review your updates to ensure all intended items were hidden and your guide reflects your current ordering needs. Your custom order guide is now updated and ready for use.

Keeping your Custom Order Guide updated ensures faster order entry, fewer errors, and a cleaner ordering experience.



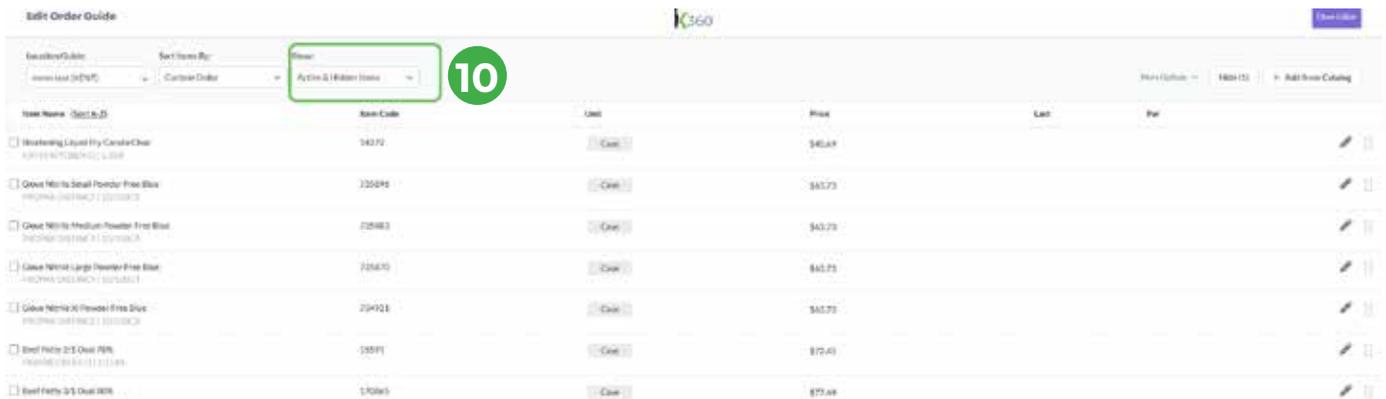
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## 10 View and Restore Hidden Items (If Needed)

If you need to add an item back to your guide, follow these steps:

While in **Edit Mode**, locate the **Show** dropdown at the top of the screen.

Select **Active & Hidden Items**.



Item Name (Click to Edit)	Item Code	Unit	Price	Qty	Per
<input type="checkbox"/> Working Liquid Fly Control Chew MORPHO 0403942   0200002	040392	Case	\$40.00		
<input type="checkbox"/> Gnat Netts Small Powder Free Blue MORPHO 0403942   0200002	030894	Case	\$43.75		
<input type="checkbox"/> Gnat Netts Medium Powder Free Blue MORPHO 0403942   0200002	030893	Case	\$43.75		
<input type="checkbox"/> Gnat Netts Large Powder Free Blue MORPHO 0403942   0200002	030892	Case	\$43.75		
<input type="checkbox"/> Gnat Netts X Powder Free Blue MORPHO 0403942   0200002	030891	Case	\$43.75		
<input type="checkbox"/> Beef Flies 2:1 Dual P/B MORPHO 0403942   0200002	05091	Case	\$72.00		
<input type="checkbox"/> Beef Flies 3:1 Dual B/W MORPHO 0403942   0200002	05095	Case	\$72.00		

## 11 Unhide the Item

Hidden items will appear in the list and are highlighted in yellow for easy identification.

Locate the item you want to restore.

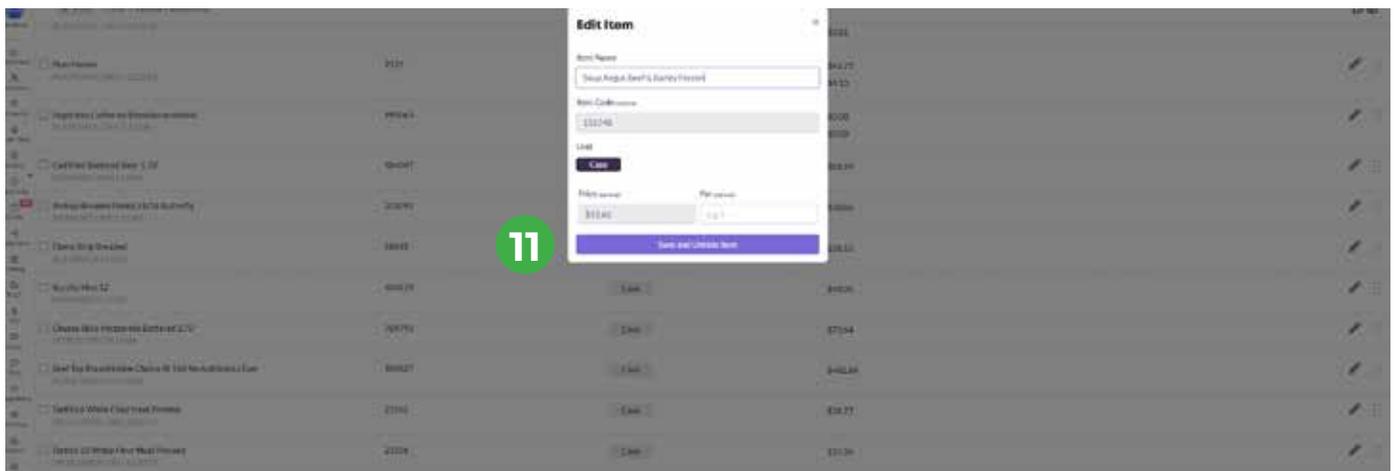
Click the **Edit (pencil) icon** next to the item.

Update the item by unselecting the hide option.

Save your changes.

Click **Close Editor** to ensure the update is saved.

The item will now appear again in your active order guide.



Item Name (Click to Edit)	Item Code	Unit	Price	Qty	Per
<input type="checkbox"/> Plain Protein MORPHO 0403942   0200002	0124		\$12.00		
<input type="checkbox"/> Liquid Fly Control Chew MORPHO 0403942   0200002	040392		\$40.00		
<input type="checkbox"/> Cat Flea Shampoo MORPHO 0403942   0200002	040397		\$18.00		
<input type="checkbox"/> Working Liquid Fly Control Chew MORPHO 0403942   0200002	040392		\$40.00		
<input type="checkbox"/> Fleas & Ticks Chew MORPHO 0403942   0200002	040393		\$18.00		
<input type="checkbox"/> Flea Netts 12 MORPHO 0403942   0200002	040394	Case	\$40.00		
<input type="checkbox"/> Cheese Bait Protein with Garlic and 2:1 MORPHO 0403942   0200002	040395	Case	\$70.00		
<input type="checkbox"/> Beef Fly Shampoo Chew 10:1 Non-Residual MORPHO 0403942   0200002	040397	Case	\$40.00		
<input type="checkbox"/> Flea Flea Chew Flea Flea Protein MORPHO 0403942   0200002	0704	Case	\$18.00		
<input type="checkbox"/> Fleas & Ticks Flea Flea Protein MORPHO 0403942   0200002	0708	Case	\$18.00		

## Summary

Regularly reviewing and updating your Custom Order Guide ensures faster order entry, fewer errors, and a more efficient ordering experience.