

## ADDING ITEMS TO A LOCKED GUIDE

This guide provides a straightforward, visual cheat sheet for adding items to a locked custom guide in K360, making the process easier and more efficient. It streamlines complex steps into a clear format, ensuring users can quickly understand and implement the necessary actions. By following this guide, users can maintain an organized workflow. It's an essential resource for anyone looking to enhance their productivity within K360.

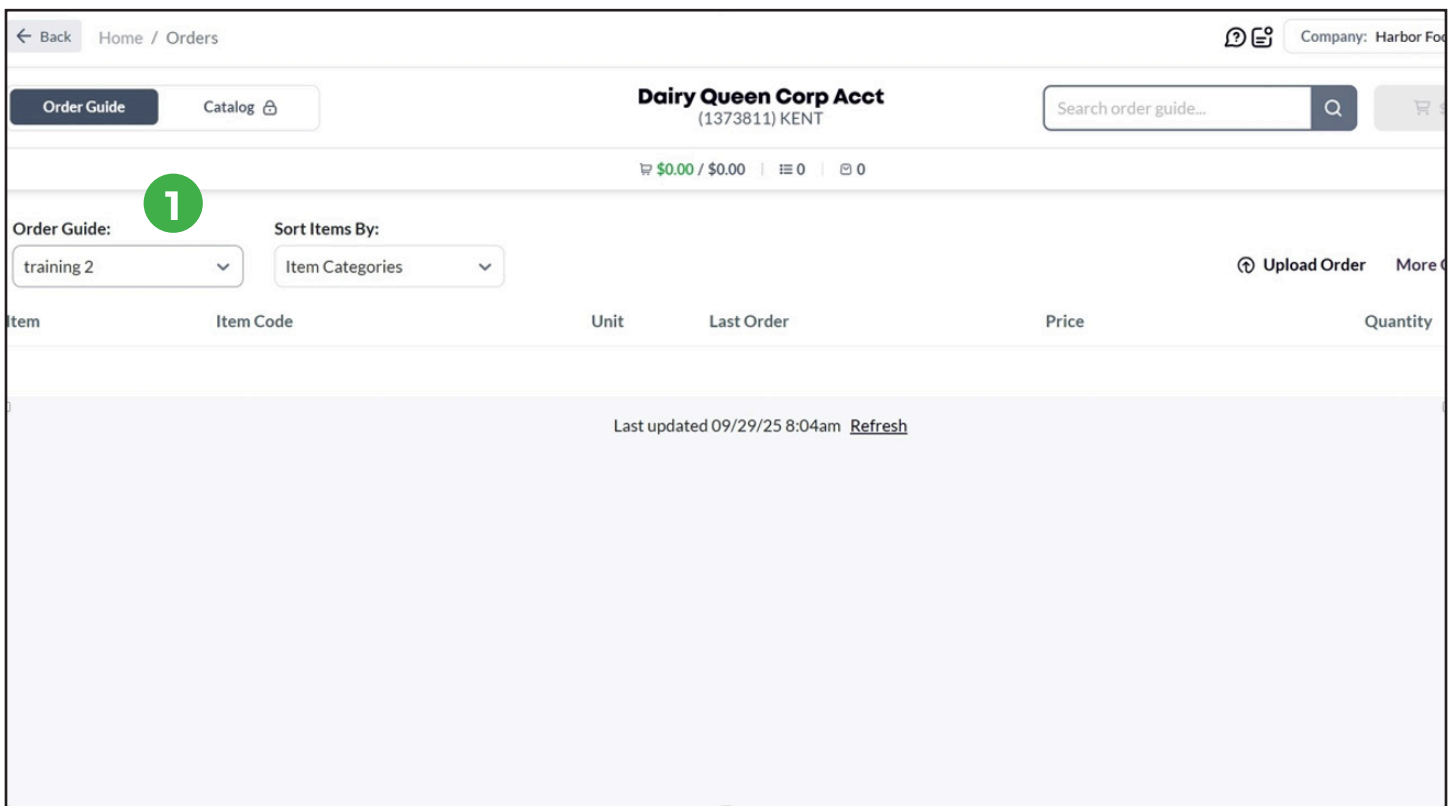
### Access Your Custom Guide

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Log into the K360 Sales Portal.

Go to Order Guides.

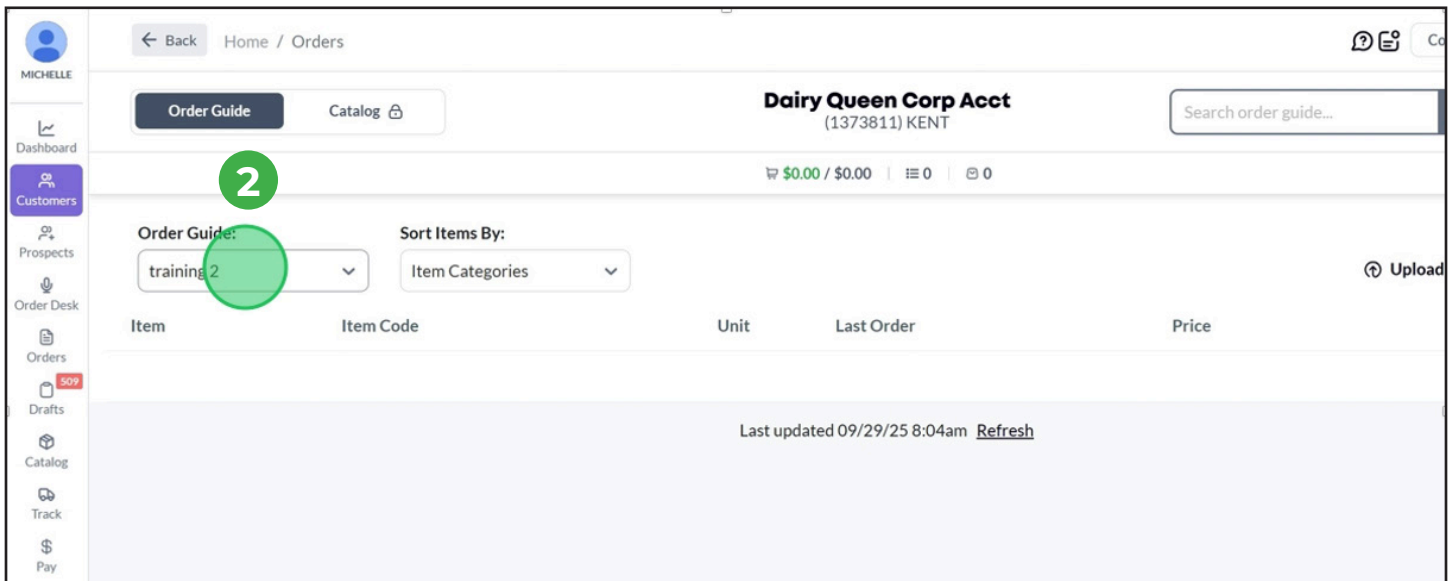
Locate your custom guide. If the guide is locked, you won't be able to edit it directly from the catalog.



The screenshot shows the K360 Sales Portal interface for the 'Dairy Queen Corp Acct (1373811) KENT'. The 'Order Guide' tab is selected, and a green circle with the number '1' highlights the 'training 2' dropdown menu under 'Order Guide:'. The 'Sort Items By:' dropdown is set to 'Item Categories'. The interface includes a search bar, a shopping cart icon, and a table with columns: Item, Item Code, Unit, Last Order, Price, and Quantity. A status bar at the bottom indicates 'Last updated 09/29/25 8:04am' with a 'Refresh' link.

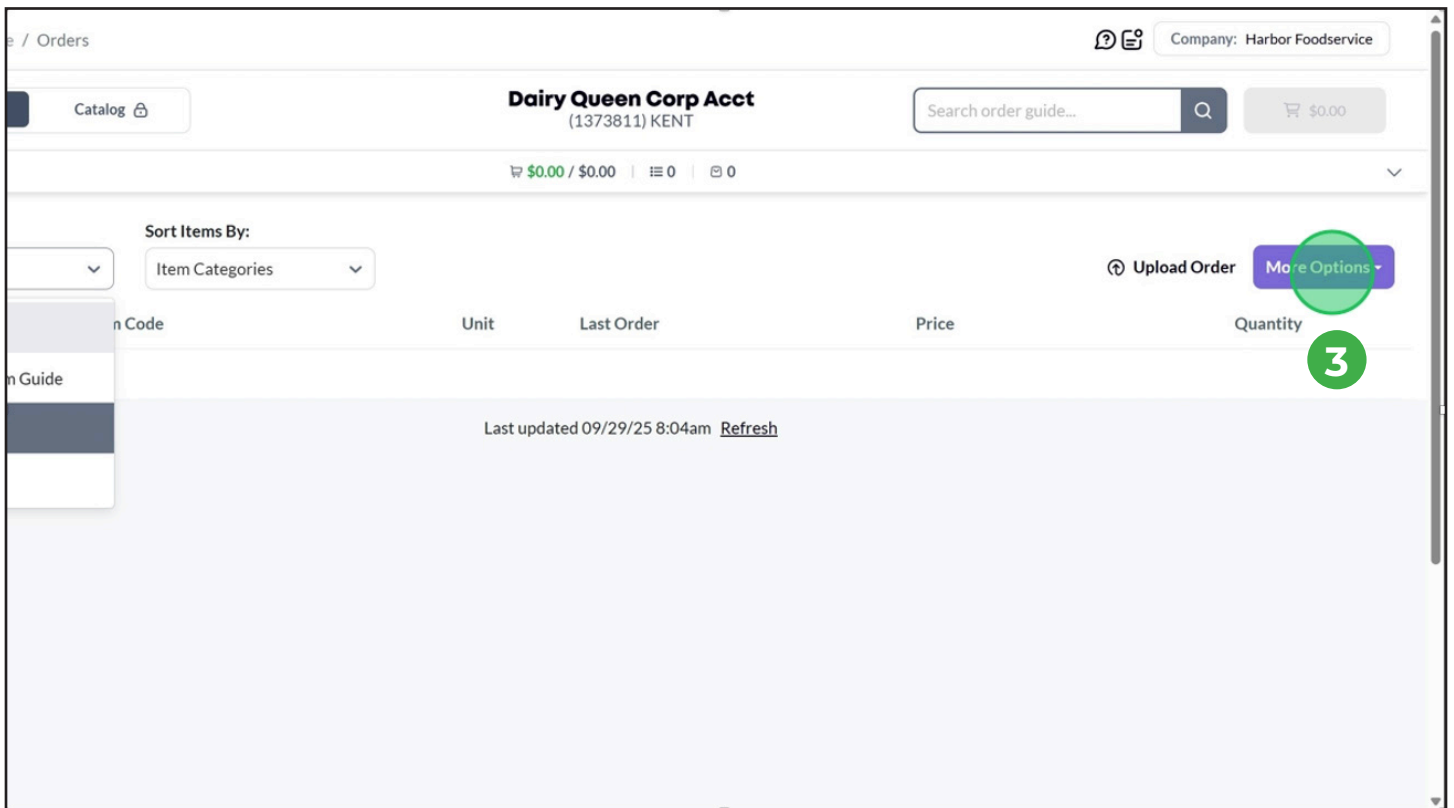
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## 2 Click on the custom guide you want to edit



## 3 Export the Guide to Excel

Click on More Options



#### 4 Click “Edit Order Guide Items”



## 5 Add Your Items in Excel

Add your new items:

1. Include Item Number and Description.
2. Optionally, add Sections or Categories in Column C if you want the items grouped in a specific way in your guide.



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### 6 Save Your Updated Excel

Save the file to a location you can easily access (Desktop is fine).

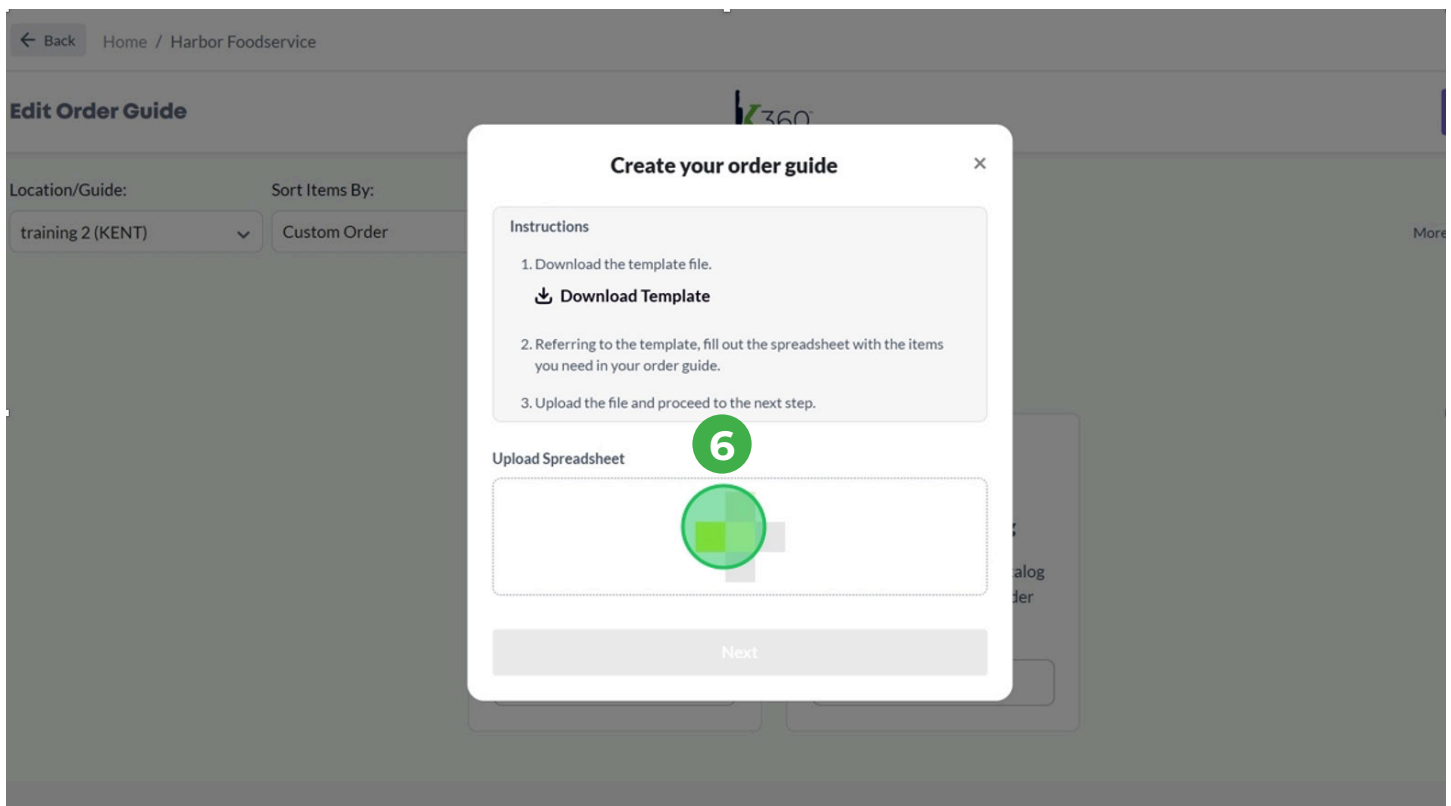
### Import Back into K360

Go back to your custom guide in K360.

Click More Options → Import from Excel.

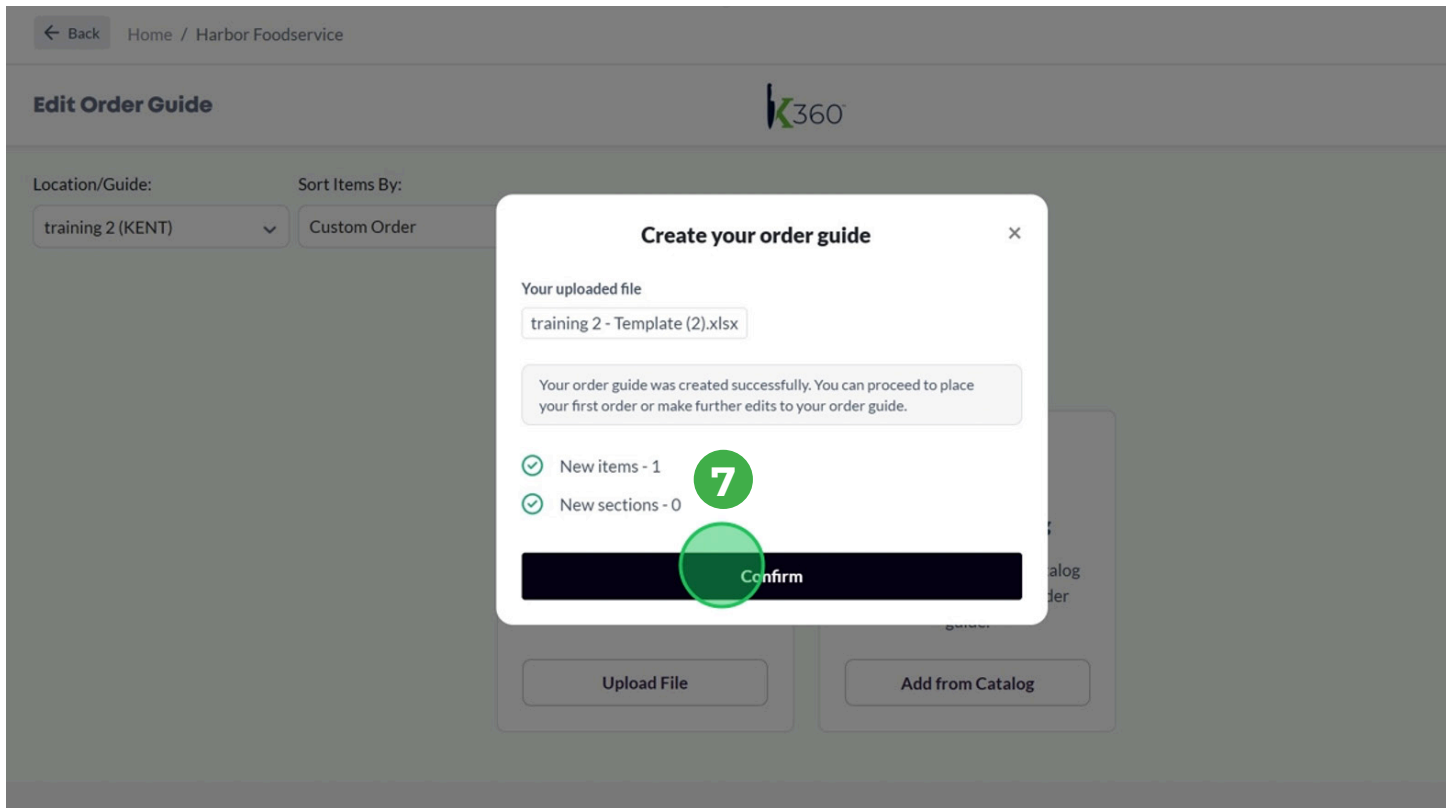
Select your updated file and import.

Review the imported items—your new items should now appear in the guide.

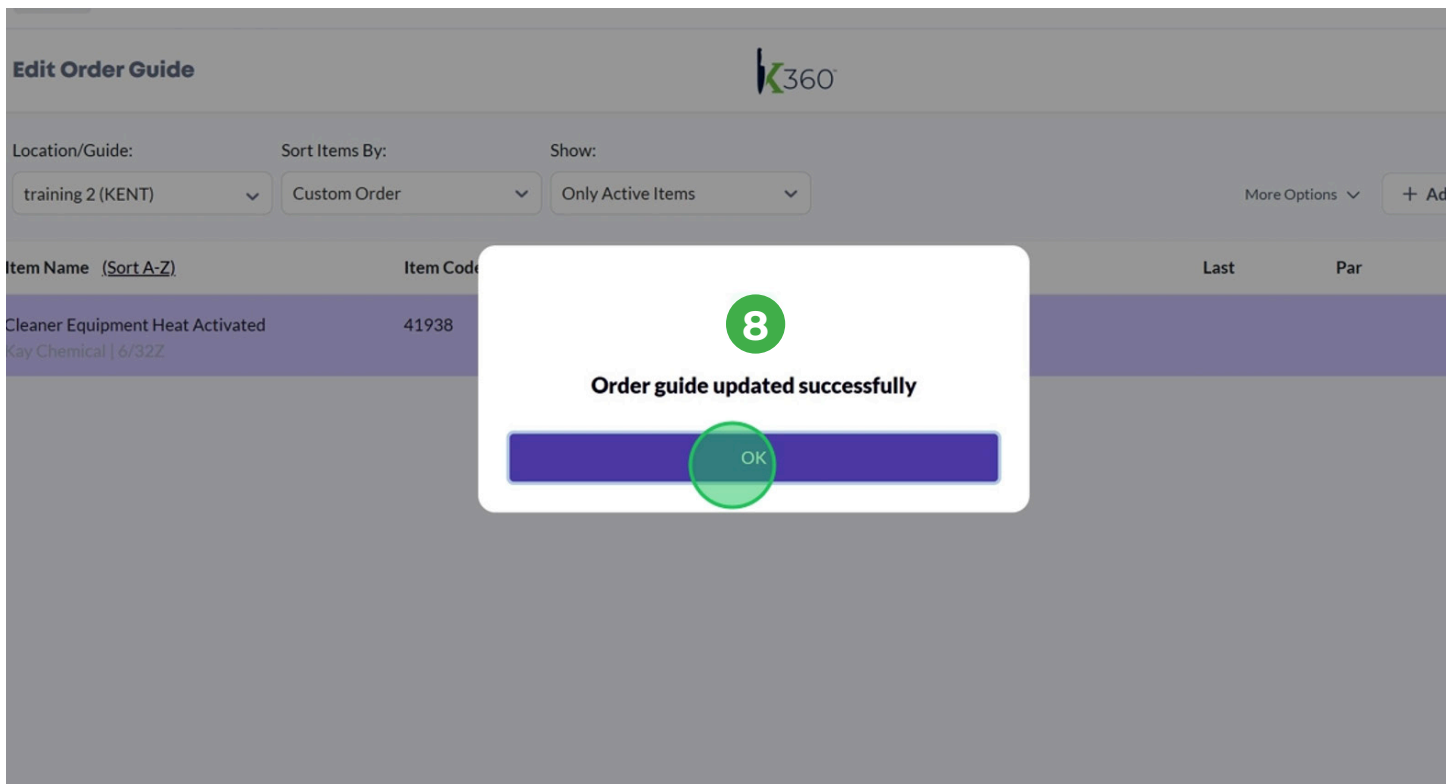


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### 7 Click “Confirm”



### 8 Click “OK”



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Click "Close Editor"

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K360

9 Close Editor

Sort Items By: Show:

Custom Order Only Active Items

More Options + Add from Catalog

A-Z	Item Code	Unit	Price	Last	Par
Heat Activated	41938	Case	\$83.51		