Order Guides

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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. The following are the bundle details:

- Bundle name: Order Guides
- Bundle ID: 275880

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 is developed and tested for use primarily with NetSuite OneWorld.

You need to enable certain features to use the Order Guides SuiteApp.

To enable features:

1. Go to Setup > Company > Enable Features.

2. Check the boxes next to all the features listed in the following table.

Subtab on Enable Features Page	Feature Name
Analytics	SuiteAnalytics Workbook
Web Presence (To give access to Customer Center role)	■ Customer Access ■ Online Ordering
SuiteCloud	■ Custom Records ■ Client SuiteScript ■ Server SuiteSctipt

3. Click **Save**.

Supported Browsers for Order Guides

The Order Guides SuiteApp supports the following browsers and operating systems:

Browser	Platform
Google Chrome 71 or newer	■ Windows 10 ■ Windows 8.x ■ Windows 7
Microsoft Edge (Anniversary Update and later)	Windows 10 (Anniversary Update)
Mozilla Firefox 60 or newer	■ Windows 10 ■ Windows 8.x ■ Windows 7 ■ Windows Vista

Creating or Customizing Roles to Use Order Guides

If you are an administrator, you can create new roles or customize roles 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.

Record	Minimum Access Level
Lists > Documents and Files	View
Lists > Items	View
Lists > Subsidiaries	View
Custom Record > Brands	View
Custom Record > Customer Group Record	View

Record	Minimum Access Level
Custom Record > Order Guide	View
Custom Record > Order Guide Item	Edit
Custom Record > Items Group	View
Custom Record > Order Guide Template	View
Customer Record > Packs Size	View
Reports > SuiteAnalytics Workbook	Edit

To give access to the Customer Center Price Settings page, you must provide the following permissions to the role:

- Customer Record > Customer Center Price Settings – View access
- Customer Record > Customer Price Setting – View access

Note: You cannot update linked order guides from roles that have restrictions applied on Order Guide custom record.

Adding Center Tab and Center Category

For a custom role, you must add the Order Guide tab to the navigation bar and Order Guide Templates menu within the Order Guide tab. To achieve this customization, create a center tab, center categories, and links within the category using the following information:

- Center tab – Label the center tab as **Order Guide**.
- Center category – In the **Categories** sublist of the **Content** subtab, add the following labels:
  - Order Guide Templates
  - Customer Center Price Settings
- Center category link – In the center categories add the following links:
  - Order Guide Templates center category – Add the link **Order Guide Template** and label the link as **Order Guide Templates**.
  - Customer Center Price Setting center category – Add the link **Customer Center Price Settings** and label the link as **Customer Center Price Settings**.

For more information, read the help topics Creating Center Tabs and 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:

- **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 NetSuite uses the base price from the item record as the default current price.

  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, and then select an item type.
   - 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. 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 SuiteApp 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:

Filter	Description	Result
Date Created	Operator: after Selector: same day last month	Includes all transactions created after the same day of the previous month
Transaction fields Transaction Filter: Customer Sub of	Operator: any of Selector: none	Excludes all transactions that are not from parent customers
Transaction fields Transaction Filter: Type	Operator: any of Selector: invoice	Includes all invoice transactions only
Transaction fields Transaction Filter: Type	Operator: any of Selector: Cash sale	Includes all cash sales transactions

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**.

Setting Up Customer Center Price Preferences

Set the display of current price in the Order Guide Entry popup window in the Customer Center role.

To set up customer center price preferences:

1. Go to Order Guide > Customer Center Price Settings > Customer Center Price Settings.

   The Customer Center Price Settings List page opens.
2. Click **Edit**.

   The Customer Center Price Settings page opens.
3. In the Customer Price Setting sublist:
   a. From the **Customer** list, select the customer
   b. To show the current price for the customer, check the box in the **Display Price** column.
   c. Click **Add**.
4. Click **Save**.

A **Display Price** box is available above the **Customer Price Setting** sublist. If you check this box, customers who do not have the display price checked in the sublist will show current price in the Customer Center role. When unchecked, current price does not appear for customers who do not have the display price checked in the sublist.

Creating Order Guides

You can create an order guide from a customer record or create an order guide template that you can assign to multiple customers. Order guides created from a customer record cannot be assigned to other customers. An order guide template can be created per subsidiary. Using the template, you can generate and assign separate order guides to multiple customers of the subsidiary.

Best Practices for Creating Order Guides

The following are the best practices for order guides:

- When creating order guide templates, you should 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, you should add up to 200 items in an order guide. If you have more than 200 items, add them in separate order guides.

Creating Order Guide from a Customer Record

You can create an order guide from a customer record.

To create an order guide 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 **Order Guide Name** field, enter a unique name for the order guide.
5. From the **Subsidiary** list, select the subsidiary that you want to associate with this order guide.
6. (Optional) To mark this order guide as a preferred order guide, check the **Preferred** box.

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

7. (Optional), To mark this order guide as historical order guide for the customer, check the **Historical** box.
8. Add items to the order guide by doing either or both of the following:
   - From the **Add Items from Saved Search** list, select an item saved search to retrieve multiple items.

     If you select another item saved search, the retrieved items are appended to the list.

     The order guide is saved and opened in edit mode and the items display in the sublist.

     If any items do not match the items filtering criteria, those items are excluded from the order guide. You can view the list of excluded items by clicking the link in the banner message.

     > **Note:** If you are using expressions in the saved search, make sure you enclose the entire expression within parentheses. Else, you may get incorrect saved search results.

   - On the **Items** subtab, in the **Item Code** field, select the item from the list, and then click **Add**.

     > **Note:** You can add duplicate items to the order guide. However, in the Order Guide Entry popup window of the sales order, the list is filtered to show only unique items.

9. (Optional) To set a default item quantity for the customer, enter a value in the **Quantity** field.
10. Click **Save**.

    On a customer record, you can view the list of order guides on the **Order Guides** subtab.

Creating an Order Guide Template

You can create an order guide template that you can assign to multiple customers.

To create an order guide template:

1. Go to Order Guide > Order Guide Templates > Order Guide Templates > New.
2. On the Order Guide Template page, in the **Order Guide Template Name** field, enter a unique name for the order guide template.
3. From the **Subsidiary** list, select the subsidiary that you want to associate with this order guide template.
4. To add items to the order guide, do either or both of the following:

- From the **Add Items from Saved Search** list, select an item saved search to retrieve multiple items.

  If you select another item saved search, the retrieved items are appended to the list.

  The order guide is saved and opened in edit mode and the items display in the sublist.

  If any items do not match the items filtering criteria, those items are excluded from the order guide. You can view the list of excluded items by clicking the link in the banner message.

  > **Note:** If you are using expressions in the saved search, make sure you enclose the entire expression within parentheses. Else, you may get incorrect saved search results.

- 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.

> **Note:** You can add duplicate items to the order guide template. However, in the Order Guide Entry popup window of the sales order, the list is filtered to show only unique items.

5. (Optional) To set a default item quantity for the customer, enter a value in the **Quantity** field.
6. Click **Save**.

Creating Order Guides from Order Guide Template

After creating the order guide template, you can create order guides from the template and assign them to multiple customers of the subsidiary.

For templates assigned to multiple customers, separate order guides are generated for each customer. In such case, the order guide's internal ID is appended to the name of each customer's order guide. To view the generated order guide, go to the **Order Guide** subtab on the customer's record.

By default, these order guides are linked to the order guide template. Any changes made to the template can be propagated to the linked order guides. For information about updating order guides, see Updating Order Guides.

To create order guides from order guide template:

1. Go to Order Guide > Order Guide Templates > Order Guide Templates.
2. Click the View link beside the order guide template from which you want to create order guides.
3. Click the **Create Order Guides** button.
4. In the Create Order Guides from Template window, select the saved search from the **List Customers from Saved Search** list.

   If you select another customer saved search, the retrieved customers are appended to the list.

   > **Tip:** To change the selection of customers, press **Shift** or **Ctrl** and from the **Customers** list box change the customer selection.

5. Click **OK**.

   A banner in the Order Guides Template page displays the status of the order guide creation. Click the **Refresh** button in the banner to update the completion status. When the order guides creation is completed, you see a confirmation message in the banner. If some items do not match the items filtering criteria, the items are excluded from the order guides. You can view the list of excluded items by clicking the link in the banner message.

> **Note:** If you try creating another order guide for a customer from the same order guide template, the SuiteApp creates a duplicate order guide. However, if you want to update an existing order guide created from an order guide template, you must update the linked order guides. For more information, read Updating Linked Order Guides.

Creating Order Guides and Order Guide Templates Using CSV Import

You can create order guides and order guide templates using the standard CSV Import feature. When using the CSV import, note the following:

- You must check the **Run Server SuiteScript and Trigger Workflows** box.
- For creating order guides:
  - Do not select the **Order Guide Template** field.
  - You cannot use the **Item Saved Search** field.
- For creating order guide templates, you cannot use the **Item Saved Search** field.

Updating Order Guides

You can update order guides created from customer records. You can also update order guide templates and propagate the updates to linked order guides.

Updating Order Guides Created from Customer Record

You can update an order guide created from a customer record. On the Order Guide subtab of a customer record, click **Edit** next to the order guide that you created from the customer record. You can perform the following actions on such order guides:

- Change the order guide name
- Add or remove items
- Change the status of the Inactive, Preferred, or Historical boxes

You can edit or remove the items. These changes do not affect existing transactions where you had used the order guide.

For linked order guides, you can only change the status of **Preferred** check box.

Updating Order Guide Templates

On the Order Guide Templates List page, click **Edit** next to the order guide that you want to update. You can perform the following actions on the order guide templates:

- Change the order guide template name
- Add or remove items.
- Update quantity for items.

Updating Linked Order Guides

The changes made to order guide templates can be pushed to all linked order guides.

To update linked order guides:

1. Go to Order Guide > Order Guide Templates > Order Guide Templates.
2. Click the View link beside the order guide template.
3. Click the **Update Order Guides** button.

   The **Update Order Guides** button appears only when you have linked order guides.
4. Click **OK**.

A banner in the Order Guides page displays the status of the order guide update. Click the **Refresh** button in the banner to update the completion status. When the update is completed, you see a confirmation message in the banner. If some items do not match the items filtering criteria, the items are excluded from the order guides. You can view the list of excluded items by clicking the link in the banner message.

Unlinking Order Guides

If you do not want a linked order guide to be updated with changes in the order guide template, you can unlink the order guide. You can unlink the order guide in the following ways:

- In the Order Guide page, click the **Unlink From Template** button.
- In View mode of the Order Guide Template page, in the **Linked Order Guides** subtab, click **Unlink** next to the order guide name.

> **Note:** After unlinking, you cannot link the order guide again and the order guide works likes an order guide created from a customer record. Alternatively, you can create a new order guide from the same template and assign the order guide to the same customer.

Updating Order Guide Templates and Order Guides Using CSV Import

When updating order guides using CSV import, in the Scan & Upload CSV page, make sure you select the following:

- From the **Import Type** list, select **Custom Records**
- From the **Record Type** list, select **Order Guide**.

When updating order guide templates using CSV import, in the Scan & Upload CSV page, make sure you select the following:

- From the **Import Type** list, select **Custom Records**
- When updating template settings, from the **Record Type** list, select **Order Guide Template**.
- When updating items in the template, from the **Record Type** list, select **Order Guide Item**.

When adding items to an existing template, from the Import Options page, you must choose **Add**.

> **Note:** You can create order guides with the same name for different customers or for different subsidiaries of the same customer. Therefore, when updating order guides using CSV import, make sure you enter the correct order guide name, customer, and subsidiary in the CSV file. Similarly, when creating an order template, make sure you enter the correct template name and subsidiary.

Deleting Order Guides

In edit mode of an order guide, click **Delete** to delete the order guide. You cannot retrieve deleted order guides. If an order guide template is deleted, then all the linked order guides are unlinked and work as order guides created from customer records.

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:

- Items are of a type supported by order guides
- Items applicable to the selected subsidiary
- 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 are of a type supported by order guides
- Items applicable to the selected subsidiary of the customer
- 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 are of a type supported by order guides
- Items applicable to the selected subsidiary of the customer
- 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 applicable to the selected subsidiary of the customer
- Items that have quantity greater than zero
- Items that are not inactive

> **Note:** Do not remove the base price of an item after adding the item to the order guide. Else, you will not be able to add the item to the sales order from the Order Guide Entry page.

In the Order Guide Entry popup window, the current price for an item is not shown in the following cases:

- If the item price is not defined in customer price level currency
- If you change the default currency in the **Currency** field of the **Accounting** subtab of the sales order

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

The following are guidelines for working with historical order guides:

- Only order guides that are not linked to order guide templates can be marked as historical order guides.
- At any time, you can have only one historical order guide per subsidiary of a customer.
- You can mark the same order guide as historical as well as preferred 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 is automatically cleared.

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, from the **Customer** list, select the customer.
3. From the **Subsidiary** field, select the subsidiary.
4. Click **Order Guide**.
5. On the Order Guide Entry popup window, from the **Order Guide** list, select the order guide you want to use.

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

   The window displays the list of unique items from the order guide.
6. In the **Quantity** column, enter the quantity.

   > **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.
7. Use the Up and Down arrow keys to move to quantity in other rows and then enter the new quantity.

   Repeat this step for each item that you want to add to the transaction.
8. (Optional) To 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**.
9. After updating the items, click **Save**.

Tip: After entering a quantity, you can directly click **Save**. The updated quantity is saved without the need to update or press the Up or Down arrow key.

The sales order is saved.

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 Entry popup window:

Key name	Action
Enter	Enables editing or saving of updates in the currently selected row.
Tab	Moves the cursor to the next button or editable field.
Up Arrow	When in a cell in the **Quantity** column, pressing Up Arrow saves the quantity entry and selects the quantity in the previous row.
Down Arrow	When in a cell in the **Quantity** column, pressing Down Arrow saves the quantity and selects the quantity in the next row.
Esc	Cancels the updates in the currently selected row.