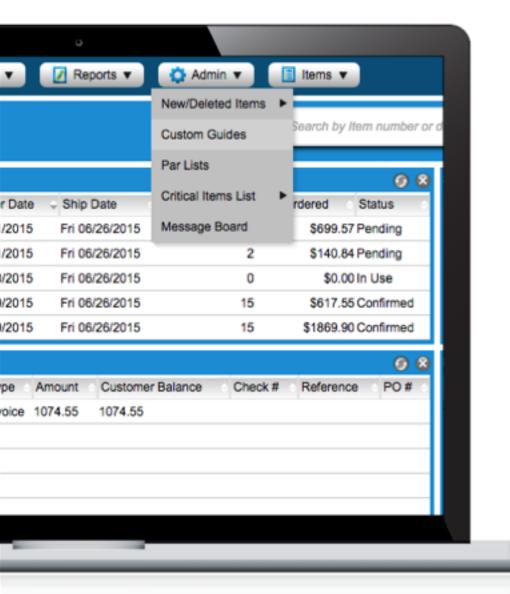


# Source Custom Guides



#### **Working with Custom Guides**

A Custom Guide contains a subset of products from the assigned Standard Guide or Item Master. Depending on how your profile is set up. Sysco Source allows you to create, edit, and delete Custom Guides.

Use a Custom Guide to create an order based on a specific group of products. For example, if you have a Custom Guide containing a basic set of products ordered weekly, you can start ordering using the Custom Guide and add items from the Item Master. Ordering from a Custom Guide uses the same procedures as ordering from Item History. The advantage of a Custom Guide is to provide a shorter, more focused list of items.

Custom guides are found under the Admin drop-down menu. Select custom guide. To create a new custom guide, click on Create.

Name the guide and provide a description. Then create the guide from a blank template, from a bid (if the customer is attached to one), from an import file, from your order history or from another custom guide you have created. Select the "Set up by:" from the drop-down choices (Custom category, category, class, sort, and sort by sequence). The last option is "Sync with:". This allows you to synchronize your custom guide with a bid that the customer is attached to.

Click Create and a message box displays - this allows you to close or edit the custom guide.





### **Working with Blank Guides**

started with create from "blank", the template will load with no items showing on it. To add items hover over "Add From" and choose from the drop down (item, class, category). If starting with item the page will look like this.

Then put the search criteria into the search box. This displays the results for the search and allows user to check any box they want to add to the template. Then click Add/Remove button to add the selected items to the template. If you cannot find an item with the search remember to check how many items are displaying (page below says 1-43 of 162). To advance page, click on arrow at right hand side of the template add section.

If you have added one in error, click on the check box on the right hand side and then click Add/Remove button to remove.





# Source Custom Guides



## **Completing a Search**

The search can be done for whatever items needed for the template. After clicking the Add/Remove button, the next search can be done again.



To exit the search, click on Back to return to the template with the added items. Click Save to save the custom guide.





## **Importing a File**

To import a file to use for the custom guide, create the guide and name it. Choose Create from: Import File. Click on browse and choose the file needed to import. (Import file needs to be in a certain format - either .csv or .txt) Then click on Create.

