

## How Do I Set Up a Matrix?

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A matrix consists of two key data elements. For this document, we will use “size” and “color”. This matrix window can be used during order entry, billing, bill only and credit memo.

The concept of the matrix window is not just limited to wearable items such as t-shirts. With this new design, you can create custom matrix windows for any type of common items where the primary difference is size and colors. Items such as dress shirts, slacks, shoes, women sizing, youths and even flashlights can be created with matrix functionality. Note: An item master is not required to use the matrix function.

#### Getting Started

To begin using the matrix functionality will require the creation of a Matrix Size, Color and ID master records. These maintenance programs related to the Matrix are located in inventory, templates.

#### Color Category Maintenance

Used to assign color categories and a long description of the category.

#### Color Code Maintenance

Used to define a three-character color code that corresponds to 10-character short description. The short description is used for the matrix display and matrix printing processes.

#### Size Code Maintenance

Used to define a two-character size code that corresponds to a 10-character short description. The short description is used for the matrix display and matrix printing processes.

#### Matrix ID Maintenance

Used to bring both data elements (size and color) together and create the user defined matrix window. Matrix ID is the primary identifier of the master record. A lookup by either the matrix's ID or the description is available. Color and size groups provide a complete listing of possible Color and Size Codes that have been previously defined. The operator then selects and moves the specific color and size codes to be used for this matrix ID over to the right-hand portion of each group. This begins the mapping process with the results displayed as they are made in real time. You may move your specific selection up and down in the lists to control the sequence of how they are displayed on the window. Once you have created your matrix ID you can assign that code to the item master(s) by editing or creating new item master records. Order entry will allow input of the matrix ID to enter quantities for the various colors/sizes.

## **Program Change/Modifications**

Item master and order entry have been changed to allow use of the new matrix ID.

**Item Master** maintenance has been changed. You can now assign a matrix ID on the item. Note: If you are planning on stocking inventory by item and/or color and a unique item number is required for each combination, it is not recommended to enter a matrix ID code in these situations. Otherwise, if the item is a drop ship item type, the use of a matrix ID is recommended, if applicable (product is offered in multiple sizes and/or colors).

**Inventory Reports** that have been affected include Open Purchase Orders, Inventory Backorder and Unshipped Items. Each of these reports has an additional checkbox to include matrix level detail. Selecting this option will print the actual sub items that were entered using matrix and their respective quantities. Not selecting this option will only print the related base item with a combined quantity for items entered through the matrix.

**Order Entry** has been changed.

When adding a new line item, the matrix ID can be entered and upon continue, the "Matrix qty" button will be enabled. Note: The qty fields will not be enabled when a matrix ID exists on the order. You must select the "Matrix qty" to add, edit or delete the quantity information.

Upon completion of the matrix quantities select Ok. The total quantity ordered will be updated to the line item edit window and you may continue to edit any other information on the line item window as normal. During billing, the matrix window will allow entry of the quantity shipped and back ordered. Double click on each quantity cell to bring up the edit window to enter those values. This only needs to be done if the quantity shipped values are different than ordered. When back orders are created for matrix items, the line item will retain the matrix detail related to the back ordered item.

Printed Documents will print matrix details when the line item contains a matrix ID. This affects all plies of the forms created from printing orders and invoices.

**Combined Purchasing Analysis** has been enhanced to allow viewing and combining of quantities for multiple orders into a matrix.

**Open Orders Report** has been enhanced to print the matrix details for a line item. This information will print below the actual line item and will include the quantities for each size and color.