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How Do You Add a Matrix to a Product Resource?

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How Do You Add a Matrix to a Product Resource?

The matrix tool allows a user to enter product quantities based on a set of attributes. Most commonly, these attributes will be sizes and colors. However, they are not limited to how they can be used as long as it is two dimensional (rows and columns).
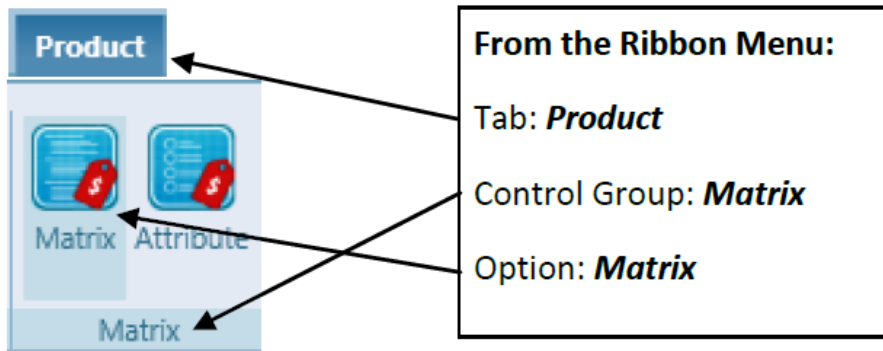

Expanding the matrix expander for the product will allow you to:

1) Create a new Matrix for the Product

2) Use an existing Matrix template.

How Do You Create a New Matrix?

From the Ribbon Menu:

Tab: **Product**

Control Group: **Matrix**

Option: **Matrix**

A Matrix template can be set up under the Product Matrix, and then be used in orders by selecting "Select template and update matrix" in the order.
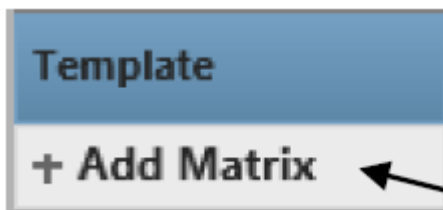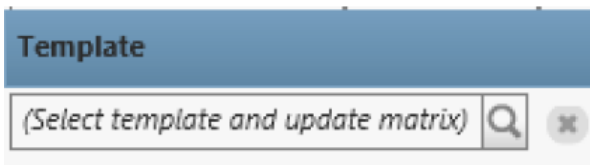
OR, a matrix can be created "on the fly' in an order by adding rows and columns within the product line of the order.
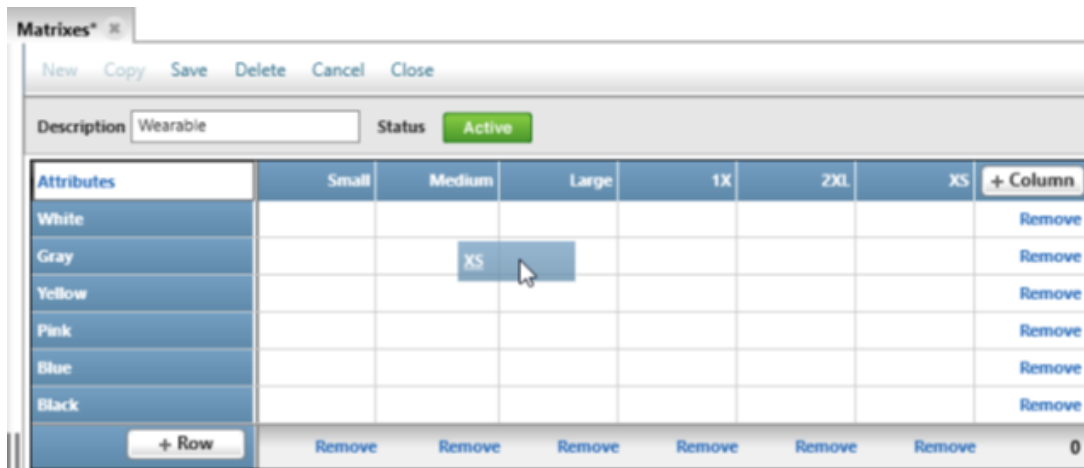
Upcharge Cost – For a product that comes in multiple attribute options, a cost upcharge can be designated. For example, if size X-Large is $0.50 more in cost, the base cost would be entered on the vendor record and the extra $0.50 entered for the upcharge cost on the X-Large attributes.

Using the down arrow, you can also enter an upcharge price per size, and the minimum you want to have in your warehouse before you reorder.
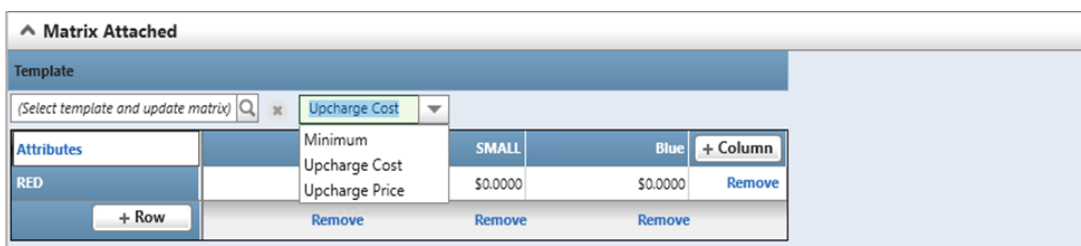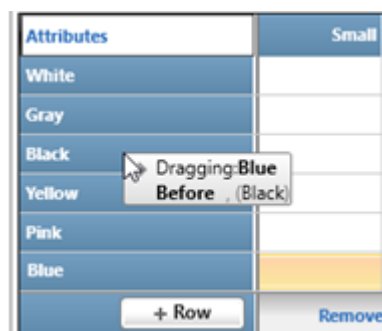
Rearrange Attributes within a Matrix?

Matrix attributes can be rearranged inside of an already existing matrix. The column and row headers can be reorganized using a series of mouse actions - click/drag/drop. This means, that if an XS attribute is added later and then you wish for that column to be first you can move it. Add it using the + Column button. Then, click on the header and drag it to the location and drop it.

The attributes on the row can also be repositioned but looks like this as it is moved to its new location.

This can occur in the following menu options:

Matrix resource

Product Manager (additional charges **do not** have a matrix control because they are inherited from the parent)

Order Manager

Quote Manager

Invoice Manager

When a Matrix resource is changed it won't change in prior orders but will show in new orders. If an Order, Quote, or Invoice is changed it won't update to the Matrix resource.