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Tammy Mason - 2017-09-13 - in Quotes, Orders & Invoices

How Do You Add a Matrix to a Quote, Order or Invoice?

The matrix can be added directly to a quote, order or invoice. After adding a product and opening the product expander, the first tab of the sub-expander will now be for a "Matrix". Click "Add Matrix" to select add a Matrix Template and amounts to a product line.

Matrix - Ordered (0) | Artwork (0) | Instructions (0) | Destination | Taxes (0) | 0.0000% | Commission

Template

(Select template and update matrix) [Search] [X] Ordered [Dropdown]

Select the Matrix feature on the Product expander.

Select a template from the List.

Description	Status
(Select template and update m	Active
car lot- C&S	Active
fourth of july shirts	Active

OR, create and add a Matrix "on the fly"!

Attributes

Blue

Red

(Select)

Description

Status

green and gold

Hunter Green

Indigo

Active

Active

Active

Active

Move

Remove

Add rows and columns "on the fly" by using the +Row and +Column options.

Select the attributes (size/colors) you want to order from the drop-down list.

Fill in the quantities within each attribute field for the size and color.

	S	M
Blue	0	0
Red	0	0
(Select)	0	0

The total for the Matrix is automatically updated and displayed in the lower right hand corner of the Matrix and under the Ordered field on the Product line, whether you use a Matrix template or add a Matrix "on the fly". You cannot edit these totals as this amount updates from the Matrix itself. The

Matrix prints on all forms below the product description and to the right of the thumbnail (if one is attached). Product level instructions, destination address, ship-to and in-hand dates will print below the Matrix.

Complete the Instructions, etc. for your Quote, Order, or Invoice as usual.

Code	Description	Ordered	Unit	IPC	Price	Price Total	Cost	Cost Total
POLO	polo	50	Each	(5)	\$0.0000	\$0.00	\$0.0000	\$0.00