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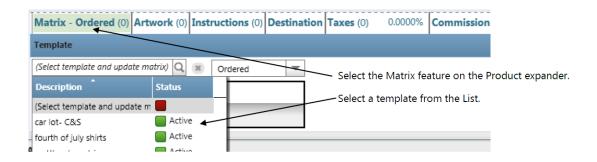
Portal > Knowledgebase > ASI SmartBooks Knowledgebase > Quotes, Orders & Invoices > How Do You Add a Matrix to a Quote, Order or Invoice?

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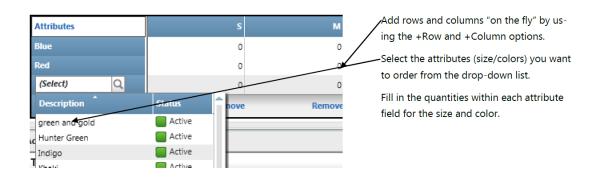
Tammy Mason - 2017-09-13 - in Quotes, Orders & Invoices

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.



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



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.

