Matrix Items

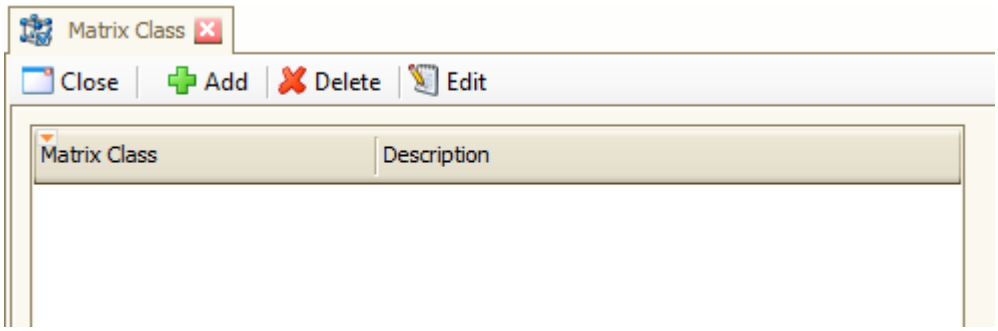
Cavallo Support - 2024-12-03 - Sales

Overview

SalesPad Matrix functionality allows a company to set up matrix item definitions and add lines to sales documents in a matrix view. Using the Matrix allows for faster order entry of items with different attributes, such as clothing items that come in different sizes and colors, by entering the item number or key just once, and selecting needed quantities of each combination.

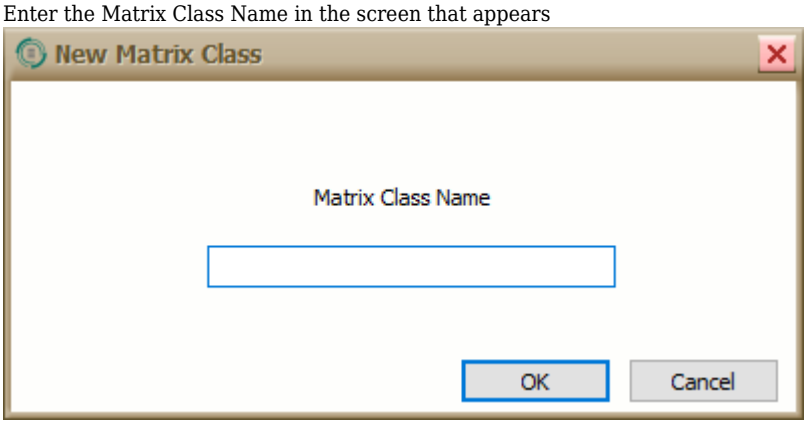
Matrix Class Maintenance

This module (Inventory > Matrix Class Maintenance) displays a complete listing of item matrices for both inventory and non-inventory items. Matrices can be created, deleted and edited.



To create a new matrix:

1. Click **Add**
2. Enter the Matrix Class Name in the screen that appears

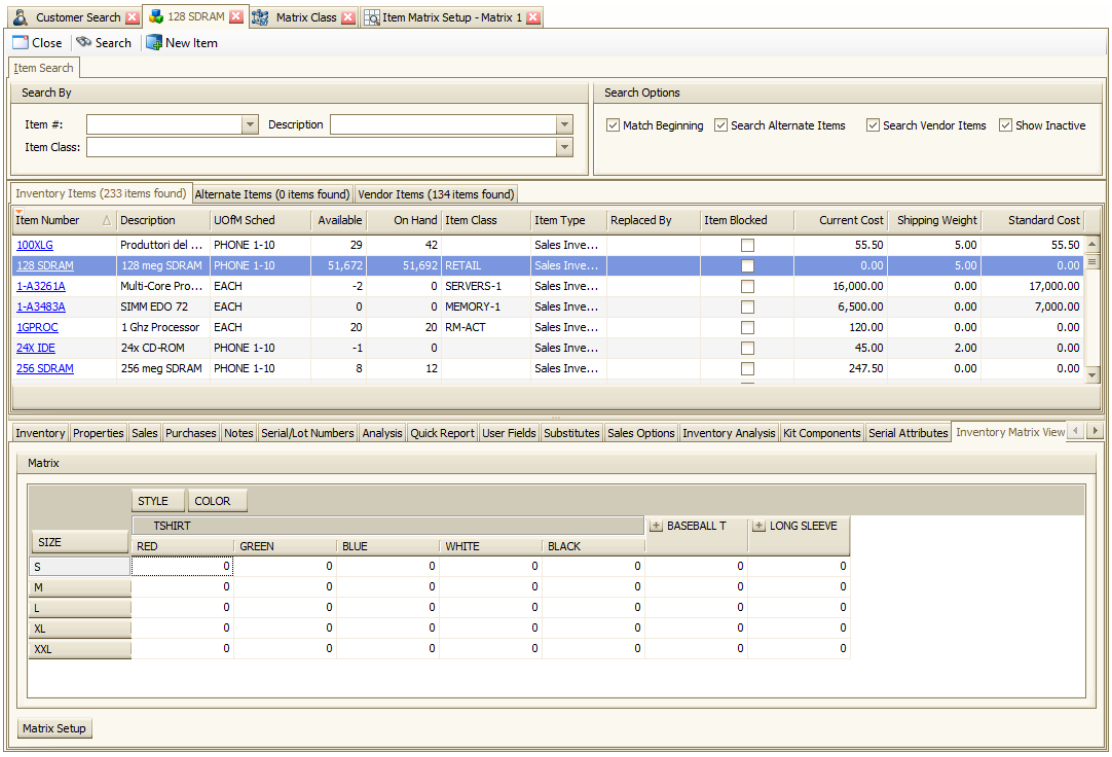


Select an existing matrix and click **Edit** to open the "Item Matrix Setup" screen

Inventory Lookup

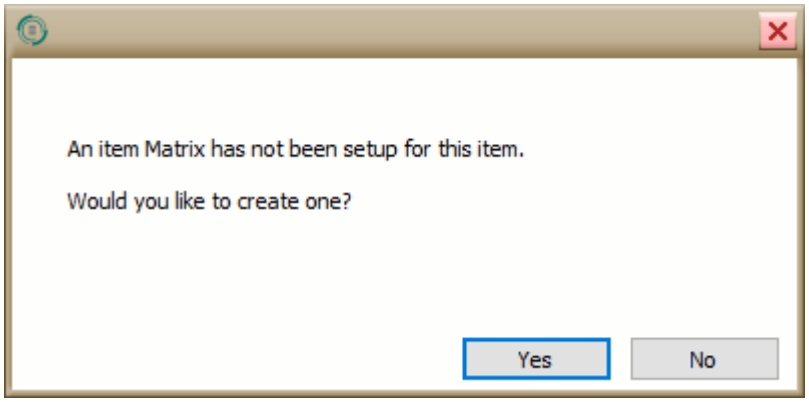
In the Inventory Lookup screen (Modules > Inventory Lookup), matrices can be reviewed on an item-by-item basis from the Inventory Matrix View tab.

Search for and select an item to view matrix properties in the Inventory Matrix View tab:



Click the **Matrix Setup** button on the lower left of the Inventory Matrix View tab to open the "Item Matrix Setup" screen.

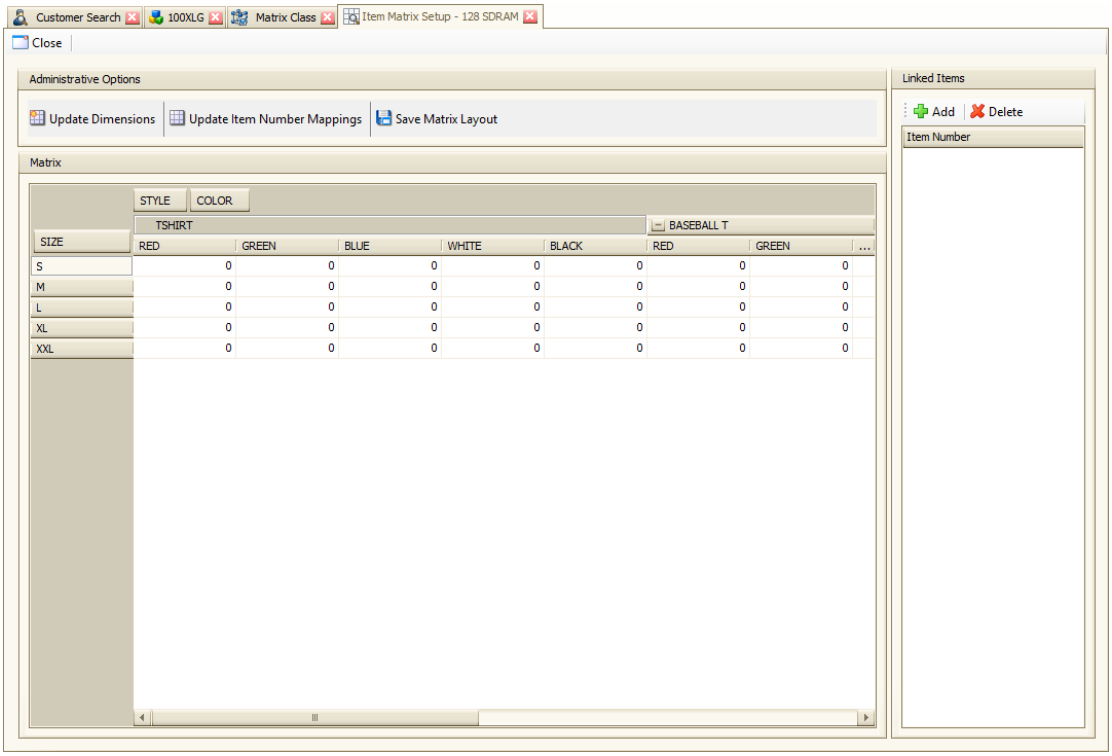
Note: If you click the **Matrix Setup** button for an item that has not been set up, you will get a message:



Click **Yes** to go to Item Matrix Setup.

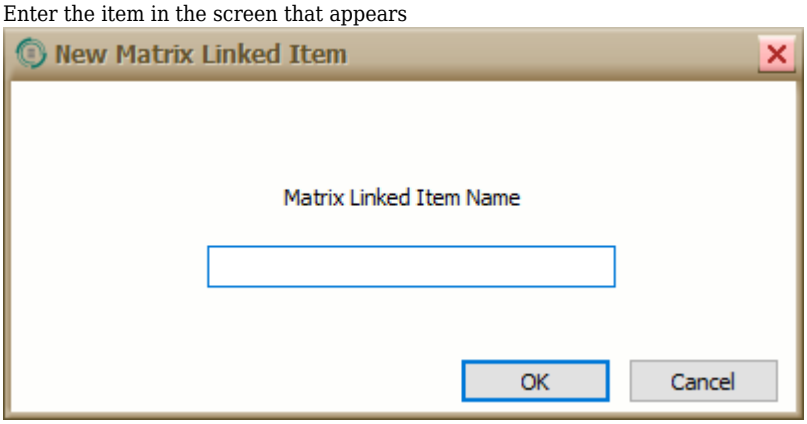
Item Matrix Setup

Item Matrix Setup allows users to review the current layout of the matrix, and update it as needed.



The Linked Items list to the right of the matrix view displays any item numbers, or nicknames, using the current matrix. To link additional item numbers:

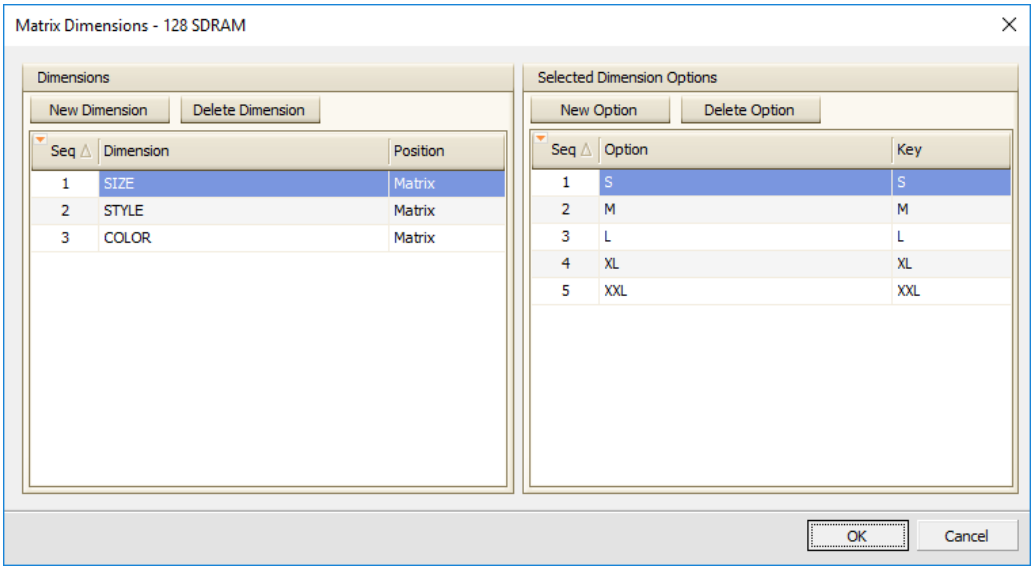
1. Click **Add**
2. Enter the item in the screen that appears



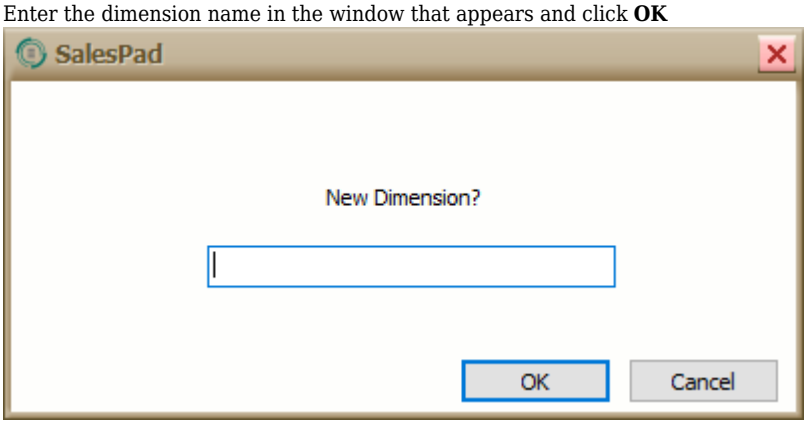
3. Click **OK**
   Note: If Item Matrix Setup was accessed through Inventory Lookup, the Linked Item being added must be a Non-Inventory Item.

To add new dimensions and dimension options to the matrix:

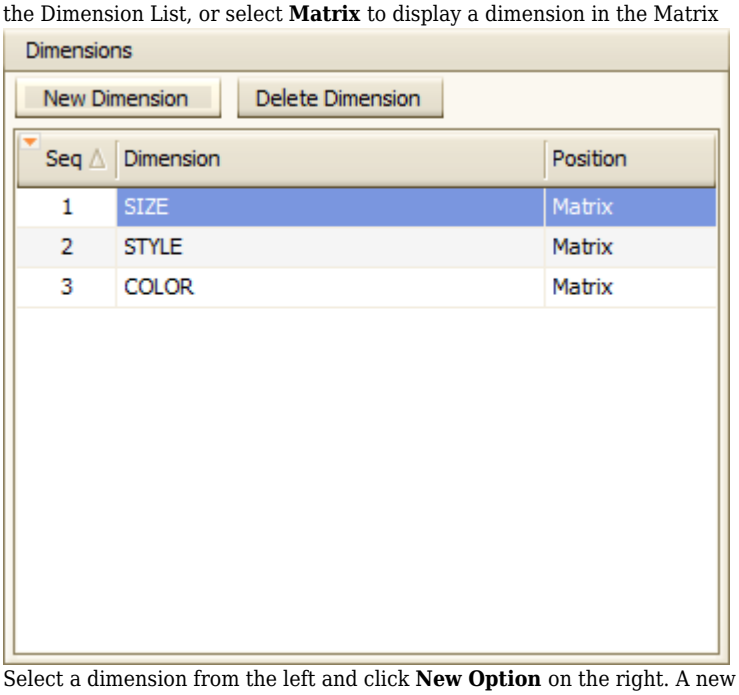
1. Click the **Update Dimensions** button. The "Matrix Dimensions" screen appears



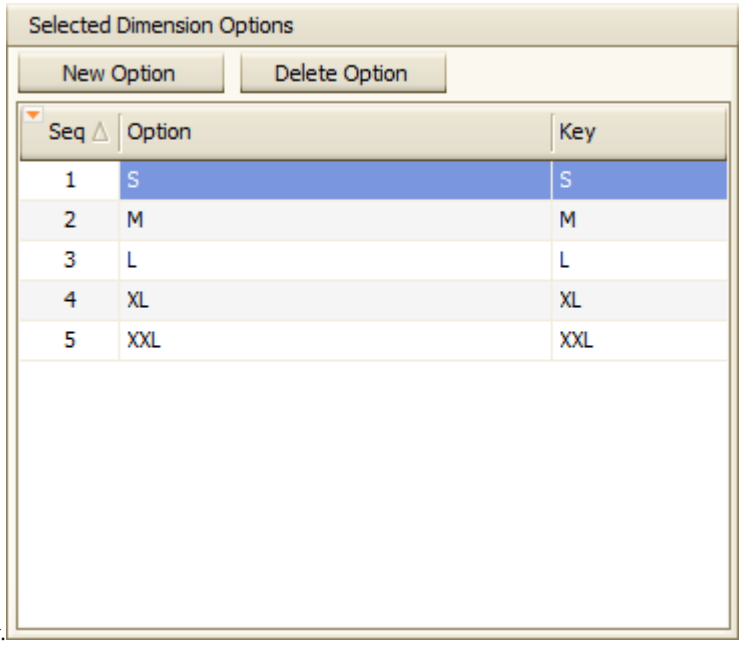
2. Click **New Dimension**
3. Enter the dimension name in the window that appears and click **OK**



4. Select a Position for the dimension to appear in Item Matrix Setup: select **List** to display a dimension in the Dimension List, or select **Matrix** to display a dimension in the Matrix

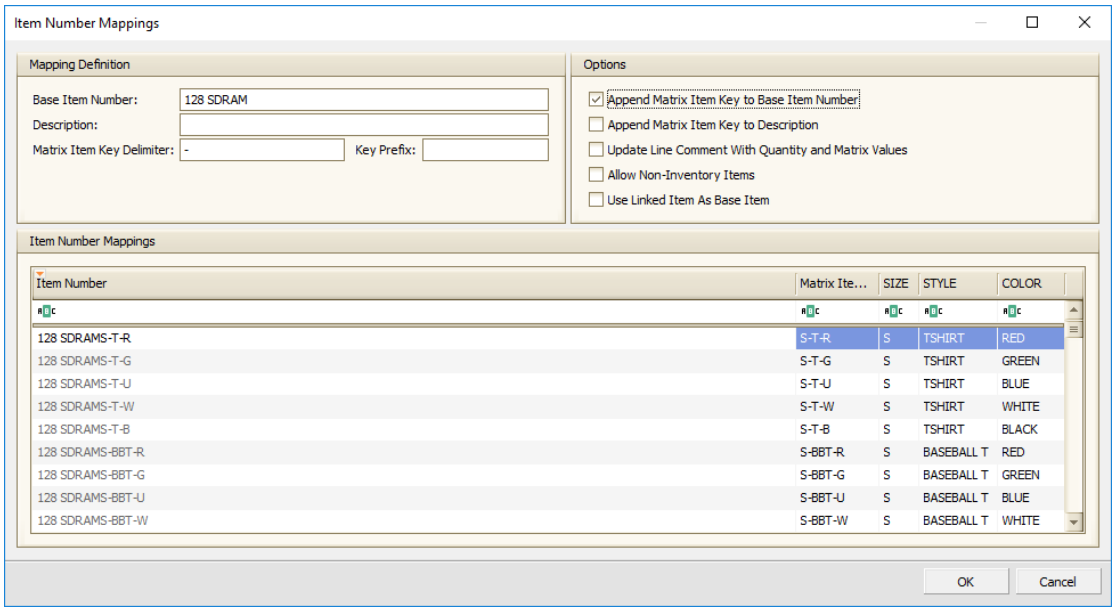


5. Select a dimension from the left and click **New Option** on the right. A new field will appear
6. Enter the Option name and Key in the field on the right
   Note: the Key is used to build the Item Number; if no key is entered, the Option name will be used.
   To use free-form text replacement, enter the indicator from the *Matrix Class Replacement Text Indicator* setting (*, in the example) on each dimension that you plan to replace the text for. To allow free-form text entry for an item's key, when entering a Matrix to the sales document, enter the indicator under



Key.

7. Repeat these steps for additional dimensions and options. When the desired dimensions and options have been added to the matrix, click **OK** to return to Item Matrix Setup.
8. Click **Update Item Number Mappings** to map item numbers to each of the different matrix combinations, as required:



Note: If Item Matrix Setup was accessed through Inventory Lookup, **Allow Non-Inventory Items** must be checked.

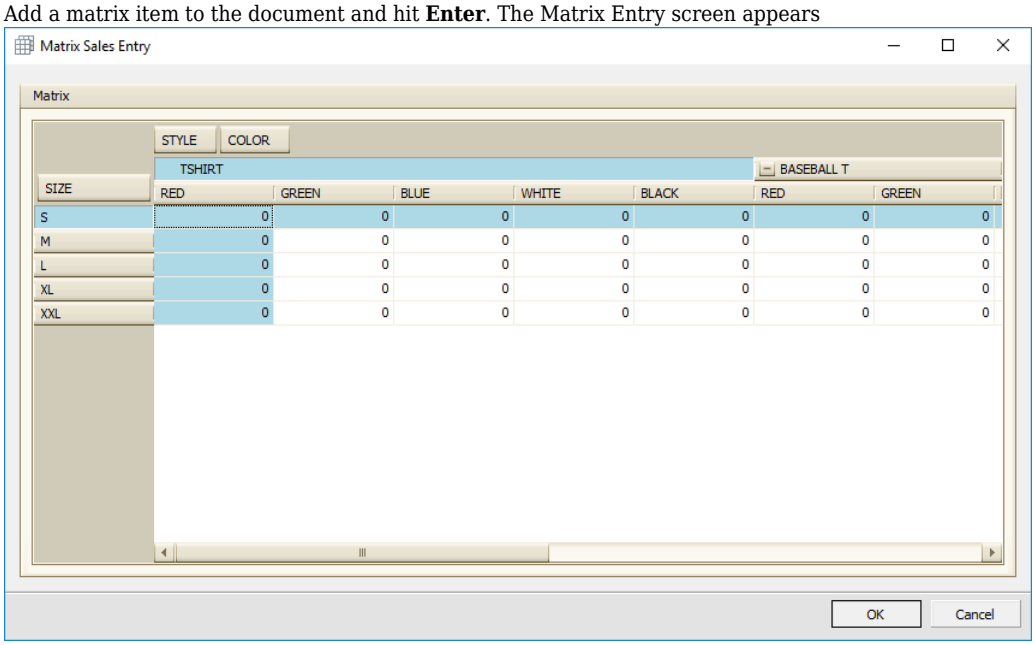
Note: If you enter a Base Item Number, you can click on individual lines to change the item number for an individual item key. Any options selected will apply to all matrix item keys.

Note: If **Append Matrix Item Key to Base Item Number**, **Append Matrix Item Key to Description**, and **Use Linked Item As Base Item** are not checked, only one item will be added to the sales document.

The Matrix Item Key Delimiter is used to add a character when multiple dimensions are used. If **Update Line Comment With Quantity and Matrix Values** is checked, the quantity and matrix values selected will appear as a line comment, and will be sold as the same item number, instead of using keys and delimiters as parts of separate item numbers.

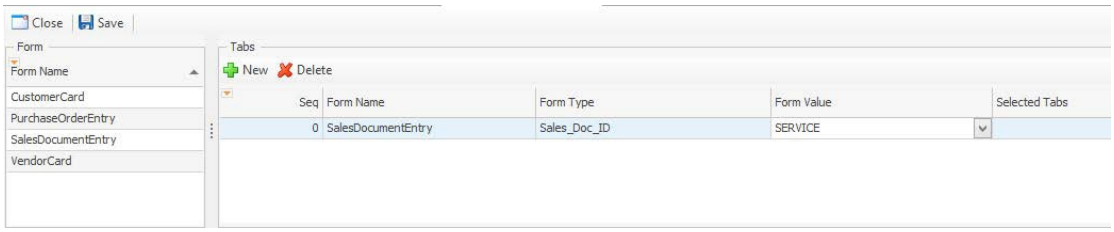
1. Click **OK** to return to Item Matrix Setup
2. Drag and drop the dimensions in the matrix view to arrange the matrix to the desired layout
3. When finished, Click **Save Matrix Layout**
4. Create a sales order, quote, or purchase order

5. Add a matrix item to the document and hit **Enter**. The Matrix Entry screen appears



6. Make selections for each list option and/or quantities for matrix options (use the arrow key to move between grid boxes)
7. Click **OK**. If indicators (*, in the example) were used during setup, you will be prompted to enter free-form text for each applicable item

Selections made will appear as line items (using the keys and delimiters used during setup) and comments on a sales document (unless **Update Line Comment With Quantity and Matrix Values** was checked during setup. In that case, the keys and delimiters will be part of the line comment, and only one line item number will be added).



If you need to change any selections, open the **Actions** dropdown and select Matrix Sales Entry or Matrix Purchase Order Entry from the dropdown to re-open the Matrix Sales Entry screen.

Security

*Inventory Matrix View** - Allows users to see the Inventory Matrix tab in the Inventory Lookup tab.

Matrix Class Maintenance - Allows users to see the Matrix Class Maintenance module.

Matrix Inventory - Allows users to access the Item Matrix Setup module.

*Matrix Sales Entry** - Allows users to use the Sales Line Action Matrix Sales Entry.

Matrix Purchase Order Entry - Allows users to use the Purchase Line Action Matrix Purchase Order Entry.

Note: You must log out of SalesPad and then back in for security changes to take place.

Settings

Use Matrix Class Replacement - Allows text replacement in dimension options or keys

Matrix Class Replacement Text Indicator - Determines the character used to trigger a string replacement for a Matrix Item