

# Using the Matrix Item Assistant

The Matrix Item Assistant provides a step-by-step process for creating matrix items without having to create item options beforehand.

**Note:** If you do not want to use the Matrix Item Assistant, you can import matrix items from CSV data files using the Import Assistant. For more information, see [Importing Matrix Options for Items](#).

## To create a matrix item with the Matrix Item Assistant:

1. Go to Lists > Accounting > Items > New.

2. Click the **Matrix Item Assistant** next to the type of matrix item you want to create.

For information about other item types, see [Using Item Records](#).

The first time you use the Matrix Item Assistant, a welcome popup window opens providing an overview of the assistant. If you do not want to see this popup window again, check the **Don't show this next time** box.

3. If you see the welcome box, click **Get Started!**

The Matrix Item Assistant divides the creation of matrix items into four steps. Click one of the links below for information about each step:

- [Step 1: Set Up Item Basics](#)
- [Step 2: Create Item Property Lists](#)
- [Step 3: Choose Property Combinations](#)
- [Step 4: Choose and Create Items](#)

Click **Back** to return to a previous step.

## Step 1: Set Up Item Basics

1. Enter the basic item information for this matrix item.

For information about a specific field, click the field name.

These settings apply to all child items in this matrix. For example, if you check the **Display in Web Site** box, all items in the matrix appear in your website.

2. Click **Next**.

## Step 2: Create Item Property Lists

1. Choose one of the following:

- **Use an existing list** – to use a custom list you have already created for this matrix item.  
Select a custom list from the list.
- **Create a new list** – to create a new list of option properties on this page.

2. If you create a new list, enter a **List Name** to display internally to your company.

The **List Name** should refer to the item you are creating the options for.

3. Enter the **List Display Name** to display to customers on your website.

The **List Display Name** should describe the item the customer is looking at. For example, if you were creating a matrix item for t-shirts, the **List Name** might be **tshirt\_size**, and the **List Display Name** might be **Size**.

4. Choose a **Show Properties** option for displaying these items on your website:
  - The Order Entered
  - Alphabetical Order
5. In the **Property Value** field, enter a property for this list.  
For example, in a list of t-shirt colors, you might enter **Green**.
6. Enter an **Abbreviation** for the property value.
7. Click **Add**.
8. Repeat these steps for each option in the list.
9. After you finish your list, do one of the following:
  - Click **Save & Create Another** to include another set of options for this item.  
If you are creating another list, follow the same steps as above.
  - Click **Next** if you are finished with your lists of options for this item.

### Step 3: Choose Property Combinations

1. You can set a new matrix item name format in the order you want the information to appear on the product name. To do so, select an item from the **Insert Item Attribute** list.
2. Select an item from the **Insert Matrix Option**.  
Tags are automatically inserted in the **Matrix Item Name Template** field. You can use separators to format the look of the product name and separate the displayed options. For more information, see [Using the Matrix Item Name Template](#).
3. Select properties from each list to include in the matrix for the item you are creating.  
Press and hold CTRL to select more than one property in each field.
4. Click **Next**.

### Step 4: Choose and Create Items

1. Clear the box next to any property combination you do not want to create a matrix item for.
2. Click **Next**.

Your item matrix is created and each combination is available on transactions.

#### [Related Topics](#)