

Creating a Matrix Item Manually

WARNING

This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

If you choose not to use the Matrix Item Assistant, you can create matrix items manually.

Note: You can use the Import Assistant to import matrix items from CSV data. For information, see [Importing Matrix Options for Items](#).

Before you can create a matrix item manually, create custom lists and custom item fields for your matrix item options. If you are using a commerce web store, you should also set up a custom transaction item option. For more information, see [Setting up an Item Matrix](#).

After you set up your custom fields for matrix options, you can create your item matrix.

To create an item matrix:

1. Go to Lists > Accounting > Items > New.
2. Click **Create Matrix Items** next to the type of item matrix you want to create.
Matrix items are available for inventory, non-inventory, other charge, assembly items and service items.
3. Click the **Matrix** subtab.
4. For each list, select the options available for this item.
To select multiple options, press and hold the **Ctrl** key and click multiple options.
5. When you finish selecting options, click **Create Matrix**.
A list of the possible item combinations appears.
6. In the **Include** column, clear the boxes next to any item you do not want to include in this item matrix.
7. Click **Submit**.

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

When you create a new matrix item, all of the settings on the item record are applied to all child items in your matrix. For example, if you check the Display in Web Site box on the item record, all matrix items are available in your website.

Related Topics