Grid Order Management

2022.2

January 11, 2023

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Table of Contents

Grid Order Management

To get you started in using Grid Order Management, read the following topics:

Grid Order Management Overview

The Grid Order Management SuiteApp lets you enter and print orders in grid format for assembly and inventory items. This SuiteApp enables you to create custom grid print templates and assign them to selected transactions.

As you create the grid order, you can view relevant item information such as the item name, location, available quantity, and price. This comprehensive grid format can save order entry time, increase the accuracy of orders, and help you sell or fulfill orders faster.

This SuiteApp has the following features:

- **Grid Order Entry** – This feature lets you enter order transactions in grid format. Grid Order Entry is available for purchase orders, sales orders, transfer orders, and quotes. For more information, see Managing Grid Orders.
- **Standard Grid Order Printing** – This feature lets you print transaction records in grid format for items added through Grid Order Entry. Standard Grid Order Printing is available only for purchase orders and sales orders. For more information, see Standard Grid Order Printing.
- **Grid Print Templates** – This feature lets you print transaction records in grid format using customizable grid templates. Grid Print Templates are available for cash sales, invoices, packing slips, picking tickets, purchase orders, quotes, and sales orders. For more information, see Grid Print Templates.

- **Bulk Grid Printing** – This feature lets you print multiple transaction records that use grid print templates. Bulk Grid Printing is available for cash sales, invoices, packing slips, picking tickets, quotes, and transfer orders. For more information, see Bulk Grid Printing.

The following table shows the available features for each transaction record.

Transactions	Available Features			
	Grid Order Entry	**Standard Grid Order Printing**	**Printing Using Grid Print Templates**	**Bulk Grid Printing**
Cash sale	N	N	Y	Y
Inventory adjustment	Y	N	N	N
Invoice	N	N	Y	Y
Packing slip	N	N	Y (2)	Y (2)
Picking ticket	N	N	Y	Y
Purchase order	Y	Y	Y	N
Quote	Y	N	Y	Y
Sales order	Y (1)	Y	Y	N
Transfer order	Y	N	N	Y

(1) Multi-grid order entry is available only for sales orders.

(2) Grid print templates can be used to print packing slips for item fulfillments that were created from sales orders or transfer orders only.

For better performance of Grid Order Management, use Mozilla Firefox or Google Chrome web browsers.

Grid Order Management SuiteApp Availability

Grid Order Management is a managed and shared SuiteApp. Contact your NetSuite account manager to purchase the SuiteApp and to have it shared with your account for installation.

The Grid Order Management SuiteApp supports English language only.

To install the SuiteApp, see Installing the Grid Order Management SuiteApp.

Limitations of Grid Order Management

Be aware of the following limitations of Grid Order Management:

- Grid Order Management supports the following item types only:
  - Inventory items (Lot Numbered and Serialized)
  - Assembly items (Lot Numbered and Serialized)
  - Matrix items (Assembly, Inventory)
- Matrix items for Non-Inventory, Other Charge, and Service items are unsupported item types.
- Customizations on order transaction forms are not reflected on the Grid Order Entry form.

- If you use the Advanced Bin/Numbered Inventory Management feature, grid matrix templates for inventory adjustments cannot support serialized and lot numbered items.
- If you use multiple currencies, the selected currency is applied across all order related transactions and it cannot be changed. For more information, see the help topic Vendors and Multiple Currencies.
- After installing Grid Order Management, you can use grid print templates to print transactions and forms. Transaction records created prior to the release of Grid Order Management SuiteApp version 6.01.0 appear as a basic report in the printout. To display old transaction records in grid format, you must click **Edit** and then click **Save** on the transaction record. You do not need to perform this step for standard grid order printing. For more information, see Grid Printing.
- Grid order printing is not available for inventory adjustments.
- Multi-Grid Order Entry is available only for sales orders.
- The Grid Order Entry form does not show on mobile devices.
- You can use the **%** wildcard character to search for specific values. This search applies to locations on the **Grid Matrix Information** subtab of parent matrix item records and templates on the transaction's Grid Order Entry form. See the following examples to search for column values that begin, end, or contain the characters you specify:
  - **str%** – Retrieves values that begin with **str**
  - **%str** – Retrieves values that end with **str**
  - **%str%** – Retrieves values that contain **str**
- The Grid Order Management SuiteApp supports English language only. The SuiteApp cannot be translated in any other language.

Other limitations and considerations are included in the following topics:

- Setting Up Grid Templates
- Applying Grid Attributes to Items
- Managing Grid Orders
- Grid Printing
- Bulk Grid Printing
- Viewing the Grid Matrix Information

Setting Up Grid Order Management

Read the following topics for information on how to set up the Grid Order Management SuiteApp:

- Prerequisites for Grid Order Management
- Installing the Grid Order Management SuiteApp
- Roles and Permissions for Grid Order Management
- Setting Grid Order Management Preferences

Prerequisites for Grid Order Management

Before installing Grid Order Management, ensure that the required features are enabled in your account. Go to Setup > Company > Enable Features.

- General features
  - On the **Items & Inventory** subtab, check the box for the following options:
    - Inventory

- Assembly items
- Matrix items
- On the **SuiteCloud** subtab, check the box for the following options:
  - Custom Records
  - Client SuiteScript
  - Server SuiteScript

If you want to use standard grid order printing or grid print templates, you must enable the **Advanced PDF/HTML Templates** feature.

For the following prerequisites, enable the features for transactions where you want to enter grid orders and use grid print templates.

- Features for grid sales orders
  - On the **Transactions** subtab, check the **Sales Orders** box.
  - If the Demand Planning feature is enabled in your account, the ship date you enter on the Grid Order Entry form is assigned as ship date for all items in the grid. This condition only applies to items that are submitted for the first time. For more information, see Managing Grid Orders.
- Features for grid purchase orders
  - On the **Transactions** subtab, check the **Purchase Orders** box.
  - On the **Order Management** subtab, check the **Allow Purchase of Assembly Items** box.
- Features for grid transfer orders
  - On the **Transactions** subtab, check the **Transfer Orders** box.
  - For OneWorld accounts, on the **Items & Inventory** subtab, check the **Multi-Location Inventory** box.
- Features for grid inventory adjustments
  - On the **Transactions** subtab, check the **Inventory Adjustment** box.
  - For OneWorld accounts, on the **Items & Inventory** subtab, check the **Multi-Location Inventory** box.
- Features for estimates

  On the **Transactions** subtab, check the **Estimates** box.

For more information about enabling required features, see the help topic Enabling Features.

Installing the Grid Order Management SuiteApp

Only administrators can install the Grid Order Management SuiteApp. Before installing, you must set the required preferences and enable the required features on your account. For more information, see Prerequisites for Grid Order Management.

To install the Grid Order Management SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search & Install Bundles page, use the following information to search for the SuiteApp:
   - Bundle Name: **Grid Order Management**
   - Bundle Id: 41296
   - Availability: Shared
3. (Optional) Click the **Grid Order Management** link to display its Bundle Details page.

- The **Admin Documentation** provides a link to the help topic.
- The **Overview** subtab displays the SuiteApp abstract and description.
- The **Components** subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.

For more information, see the help topic Bundle Details.

4. Click **Install**.

   If asked, indicate your agreement to allow NetSuite to automatically upgrade the SuiteApp in your account when new updates become available.

   During the installation, you can click **Refresh** to get the latest status.

After installing the SuiteApp, you can set the roles and preferences according to your company's requirements. For instructions, read the following topics:

- Roles and Permissions for Grid Order Management
- Setting Grid Order Management Preferences

Roles and Permissions for Grid Order Management

Read the following topics for information on the roles and permissions for Grid Order Management:

- Grid Order Management Custom Roles
- Grid Order Management Permissions

Grid Order Management Custom Roles

After you install the Grid Order Management SuiteApp, the following custom roles become available:

- CEO - Grid Order Entry
- CFO - Grid Order Entry
- Sales Manager - Grid Order Entry
- Sales Vice President - Grid Order Entry
- Sales Administrator - Grid Order Entry
- Sales Person - Grid Order Entry

These roles are preconfigured with a default set of permissions required to use Grid Order Management. Administrators can assign the roles. The grid custom roles can also be used as templates for creating new roles or modifying existing ones. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

NetSuite center views can vary depending on your role. The following are role-specific views of the NetSuite center for Grid Order Management:

- **Administrator** – Lists > Grid Order Entry
- **Executive** – Sales/Marketing > Grid Order Entry
- **Sales or Accounting** – Customer > Grid Order Entry

The following list shows the different navigation paths to create a grid template, depending on the role:

Role	Navigation
Administrator	Lists > Grid Order Entry > Grid Templates

Role	Navigation
CEO - Grid Order Entry	Sales/Marketing > Grid Order Entry > Grid Templates
CFO - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Manager - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Vice President - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Administrator - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Person - Grid Order Entry	Customers > Grid Order Entry > Grid Templates

Grid Order Management Permissions

Instead of editing roles individually, you can use the Mass Update feature to add, remove, or change the level of permission for multiple roles. For more information, see the help topic Mass Updating a Permission on Custom Roles.

To view the default permissions assigned to these roles, go to Setup > Users/Roles > Manage Roles and click the link for the role.

The following table lists the record permissions required to use Grid Order Management:

Permission	Subtab	Minimum Permission Level
Apply Attribute	Custom Record	Full
GOE - Grid Item	Custom Record	Full
GOE - Grid Item Template	Custom Record	Full
GOE - Grid Matrix	Custom Record	Full
GOE - Grid Matrix Template	Custom Record	Full
GOE - Grid Order Item	Custom Record	Full
GOE - Grid Order Template	Custom Record	Full
GOE - Preferences	Custom Record	Full
Grid Attribute	Custom Record	Full
Grid Attribute - Value	Custom Record	Full
Grid Template	Custom Record	Full
Custom Record Types	Setup	Edit
Custom Item Fields	Setup	Edit
Custom Record Entries	Lists	Edit
Location	Lists	View
Subsidiaries*	Lists	View
Accounting Lists	Setup	View

* For OneWorld accounts only.

To use grid print templates, the role must have access to the NetSuite File Cabinet.

Permission	Subtab	Minimum Permission Level
Documents and Files	Lists	Full

On the role record of the **Forms** subtab, click the **Custom Record** subtab. In the **Enabled** column, verify that all Grid Order Entry forms are set to **Yes**. See the following table for the complete list of forms:

Type	Form Name	Notes
Apply Attribute	Standard Apply Attribute Form	-
Apply Attribute	GOE - Apply Attribute Form	Set as preferred
GOE - Grid Item	Standard GOE - Grid Item Form	-
GOE - Grid Item Template	Standard GOE – Grid Item Template Form	-
GOE - Grid Matrix	Standard GOE – Grid Matrix Form	-
GOE - Grid Matrix Template	Standard GOE – Grid Matrix Template Form	-
GOE - Grid Order Item	Standard GOE – Grid Order Item Form	-
GOE - Grid Order Template	Standard GOE – Grid Order Template Form	-
GOE - Grid Template	Standard GOE - Grid Template Form	-
GOE - Preferences	Standard GOE - Preferences Form	-
GOM Apply Attribute Log	Standard GOM Apply Attribute Log Form	-
GOM Background Process Request Log	Standard GOM Background Process Request Log Form	-
Grid Attribute	Standard Grid Attribute Form	-
Grid Attribute	GOE - Grid Attribute Form	Set as preferred
Grid Attribute - Value	Standard Grid Attribute - Value Form	-
Grid Attribute - Value	GOE - Grid Attribute - Value Form	Set as preferred

Setting Grid Order Management Preferences

You can set preferences for the Grid Order Entry form, grid printing, and preferred grid template.

> **Note:** The navigation paths used in these instructions are based on the Administrator role. If you are not an administrator, you may see a different view of the NetSuite center. For more information, see Roles and Permissions for Grid Order Management.

Setting Grid Order Preferences

Grid order preferences enable you to modify the settings of the Grid Order Entry form.

To set grid order preferences:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.

2. In the **Grid Order** subtab, set the following preferences:
   - **Default No. of Decimal Places** – Enter the number of decimal places for percentages in grid templates and Grid Order Entry form. The default is 2 and the maximum is 5.
   - **Percentage Tolerance** – Enter the tolerance value in decimal form when the total percentage is not 100%. The value you enter is applied to the minimum and maximum tolerance.

     By default, the tolerance is set to 0.01 which limits the total percentages from exceeding by 1% above or below 100%. For example, the total is either 104.3% or 97.03%. When the tolerance is exceeded, you cannot submit the grid order.

     The Percentage Tolerance preference does not apply to inventory adjustments.
   - **Enable Quantity Distribution** – Check this box to enable automatic distribution of the total quantity across the items on a Grid Order Entry form. The distribution is based on percentages defined on your grid template. This preference is enabled by default.
   - **Show Percentage Column** - Check this box to show the percent columns on the Grid Order Entry form. This preference is enabled by default.
   - **Enable Multi-Grid Order Entry** – Check this box to enter grid orders using multiple templates in one Grid Order Entry form. The Order Summary table on the Grid Order Entry form lists the orders you entered in the grid templates. For more information, see Entering Multi-Grid Orders.
3. Click **Save**.

Setting Grid Printing Preferences

Grid printing preferences enable you to modify the settings for printing grid orders or templates.

To set grid printing preferences:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.
2. On the **Grid Printing** subtab, specify an email address for bulk grid printing notifications in the **Email Recipients for Errors** field. If you leave this field blank, the email notifications are sent to administrators.

   You can also send notifications to multiple recipients using a group email address
3. Select a grid print template for each transaction or form.

   You can select a standard print template or customized print template that you can use for grid printing. If you do not want to set up grid printing, select the **No Grid Template** option from the list.

   By default, the standard grid templates provided in the Grid Order Management SuiteApp are selected for the following transactions and forms:
   - **Cash Sale** – wd_gom_template_csgridprintout.xml
   - **Invoice** – wd_gom_template_ivgridprintout.xml
   - **Packing Slip** – wd_gom_template_psgridprintout.xml
   - **Picking Ticket** – wd_gom_template_ptgridprintout.xml
   - **Purchase Order** – wd_gom_template_pogridprintout.xml
   - **Quote** - wd_gom_template_qtgridprintout.xml
   - **Sales Order** – wd_gom_template_sogridprintout.xml
4. Click **Save**.

You can use advanced print templates that are customized for grid printing. For more information, see Customizing the Printout using Advanced PDF/HTML Templates.

Grid Order Management SuiteApp also enables you to create custom grid print templates for selected transaction records. When you delete a template used for grid printing, you must edit your grid printing preferences. For more information, see Customizing the Grid Print Templates.

Setting the Preferred Grid Template Preference

The preferred grid template preference lets you set the value of the **Set As Preferred Grid Template** box. This box appears when you create or edit a grid matrix template.

To set the preferred grid template preference:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.
2. On the **Preferred Grid Template** subtab, leave the **Check By Default The Set As Preferred Grid Template Box On The Grid Matrix Template And Bulk Create Grid Matrix Template Pages** box checked.

   If you enable this preference, the **Set As Preferred Grid Template** boxes on both the Grid Matrix Template and Bulk Create Grid Matrix Templates pages are also checked. Then, you can leave the boxes checked so that the matrix template you create automatically becomes the preferred grid template. You can override this preference when creating or editing a matrix template. For more information, see Creating a Single Grid Matrix Template and Creating Grid Matrix Templates in Bulk.
3. Click **Save**.

Setting Up Grid Templates

You can set up a grid matrix or grid item template for assembly and inventory items. Use grid matrix templates for matrix items, or grid item templates for either matrix and nonmatrix items.

Read the following topics for more information about each of these templates:

- Setting Up Grid Matrix Templates
- Setting Up Grid Item Templates

Guidelines for Setting Up Grid Templates

Note the following guidelines when setting up grid templates:

- Grid Order Management can optimally handle up to 1000 matrix templates and 1000 item templates. In NetSuite OneWorld accounts where items can be shared by multiple subsidiaries, you can set up a maximum of 1000 grid templates for better performance of the grids.
- Grid templates can support a maximum of 200 values as grid attributes. To determine if a grid template exceeds the maximum number set for grid attributes, multiply all values specified for each grid attribute. You cannot create grid templates for parent items with more than 200 grid attributes.

  For example, a parent matrix item that has 195 subitems contains the following attributes:
  - 26 colors
  - 3 sizes
  - 3 fabrics

  In this example, a total of 234 attributes can be derived from multiplying all values specified for each grid attribute. The total exceeds the maximum number of grid attributes for a matrix template. Therefore, you cannot create a grid matrix template for this parent matrix item. The system displays an error message when the matrix template you want to create exceeds the maximum number set for grid attributes.

- Only matrix items with two or more attribute sets are supported. You can edit an item record to add more attributes to a parent matrix item. For more information, see the help topic Editing Matrix Items.

  When you add or remove an attribute of a matrix item, you must also refresh the grid matrix template associated to the item record. To get the updated matrix items for the grid matrix template, go to Lists > Grid Order Entry > Grid Templates. Click **Edit** beside the template. Click **Get Item**, then click **Save**.
- You can only create grid matrix templates for parent matrix items that contain child matrix items.
- You cannot create new grid matrix and grid item templates using CSV Import and SOAP web services.
- For consistency, avoid changing the names of used grid templates. Template names shown in associated transactions are not updated automatically when the template names are changed. However, if you change a template name, it is shown in new grid line items that you add to associated transactions. This behavior results in transactions where line items use the same template but display either the previous or updated name. Names that are shown in line items are also used for printouts generated through standard grid order printing only.

For limitations of Grid Order Management in general, see Limitations of Grid Order Management.

Setting Up Grid Matrix Templates

Grid matrix templates define how matrix items are organized on a transaction form. When you select a parent matrix item in the template, the row and column attributes are populated with properties that define the matrix item. When the matrix item is retrieved, the child matrix items are organized in the grid according to the row and column value combinations.

For more information on grid matrix templates, read the following topics:

- Creating a Single Grid Matrix Template
- Editing a Grid Matrix Template
- Deleting a Grid Matrix Template
- Creating Grid Matrix Templates in Bulk
- Creating a Copy of the Grid Matrix Template
- Assigning a Preferred Grid Template

Creating a Single Grid Matrix Template

Use the following procedure to create a single grid matrix template. To create grid matrix templates in bulk, see Creating Grid Matrix Templates in Bulk.

To create a single grid matrix template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **New Grid Matrix Template**.

   Before you can access the **New Grid Matrix Template** button, you must first enable the **Matrix Items** feature. For more information, see Prerequisites for Grid Order Management.
3. On the Grid Matrix Template page, do the following in the Matrix Item Definition section:
   a. In the **Name** field, enter a name for the grid matrix template.
   b. In the **Matrix Item** field, select the matrix item you want to configure.

When you select a matrix item, the system populates the **Category** field with the item's properties. It also sets default values in the **Column Attribute** and **Row Attribute** fields. If the matrix item is defined by more than two properties or categories, one property is automatically assigned as the column attribute and the other properties as row attributes.

c. (Optional) In the **Description** field, enter a grid template description.

   The limit is 300 characters.

d. To set this template as the preferred grid template, leave the **Set As Preferred Grid Template** box checked.

   When a template is set as preferred, it automatically becomes the template for the selected assembly or inventory matrix item, including all its child items. If you do not want to set this template as the preferred grid template, clear the **Set As Preferred Grid Template** box.

   By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.

4. In the Grid Template section, do the following:

   a. In the **Column Attribute** field, select a property to designate as the column attribute.

      When you change the column attribute, the value you replaced is automatically assigned in the **Row Attribute** field.

   b. In the **Available In** field, select the transactions where you want the grid template to be available.

      Doing so enables you to open the Grid Order Entry form on the selected transactions.

   If you use the Advanced Bin/Numbered Inventory Management feature, you cannot select the Inventory Adjustments transaction for lot numbered and serialized items. For more information, see Limitations of Grid Order Management.

5. Click **Get Item**.

   The items are placed in a grid, along with the matrix child items mapped to the row and column values.

6. In the grid, enter the percentage of the total order quantity you want for each column and row value.

   For example, you can use the distribution of percentages to control the distribution of item quantities across customers.

   The row and column percentages are automatically adjusted as you enter the percentage for each attribute value. The total percentage should be equal to 100.

   The percentages defined on the matrix template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.

7. To save the grid matrix template, click **Save**. If you want to start over with a blank template without saving the current one, click **New**.

The grid matrix templates can be used for grid order entry. For more information about creating grid orders, read the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

Editing a Grid Matrix Template

When you edit a grid matrix template, existing orders that use the template do not update automatically. For more information, see Editing Grid Orders. Additionally, you cannot inactivate a parent matrix item or delete a matrix item that is assigned to a grid matrix template.

Use the following procedure to edit a grid matrix template.

To edit a grid matrix template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **Edit** beside the grid matrix template you want to update.
3. Edit the grid matrix template as needed. You can update the **Name**, **Description**, **Available In**, and **Percent** fields.

   You can also check or clear the **Set As Preferred Grid Template** box. By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.

   To rearrange the grid, click and drag the column header and drop it on its new position.
4. Click **Save**.

Deleting a Grid Matrix Template

When you delete a grid matrix template assigned to an item, the **Preferred Grid Template** field in the **Custom** subtab of the item record becomes blank. Additionally, if the template is assigned to a parent matrix item, the preferred grid template for its child matrix items also becomes blank.

Use the following procedure to delete a grid matrix template.

To delete a grid matrix template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **Edit** or **View** beside the grid matrix template you want to delete.
3. Click **Delete**.

Creating Grid Matrix Templates in Bulk

Grid matrix templates created in bulk can be used in all supported transactions. Use the following procedure to create grid matrix templates in bulk.

To create a single grid matrix template, see Creating a Single Grid Matrix Template.

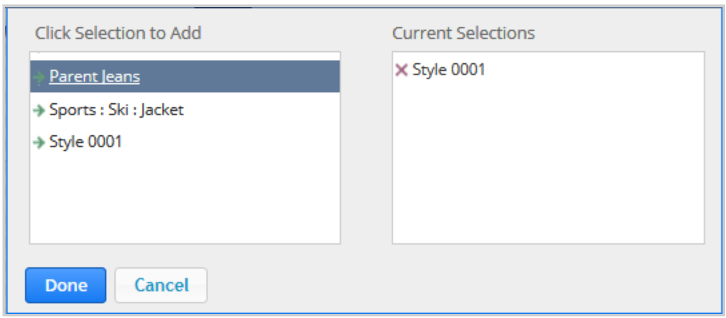
To create grid matrix templates in bulk:

1. Go to the Grid Templates page.

- If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
- If you are using other roles, read Roles and Permissions for Grid Order Management.

2. In the Grid Templates list, click **Bulk Create Grid Matrix Templates**.
3. On the Bulk Create Grid Matrix Templates page, click the dropdown arrow beside the **Parent Matrix Items** list box.
4. In the popup list, click an item name from the left pane to select it.

   Selected items are transferred to the right pane. To remove an item from the Current Selections list, click the **x** icon.



5. Click **Done**.
6. In the **Column Attribute** field, select the attribute that you want to show as the column header in the grid matrix template.

   After you select the column attribute, the other attributes become row attributes in the grid template.

   The system can only generate grid templates for parent matrix items that have at least one column attribute selected.
7. To set this template as the preferred grid template, leave the **Set As Preferred Grid Template** box checked.

   When a template is set as preferred, it automatically becomes the template for the selected assembly or inventory matrix item, including all its child items. If you do not want to set this template as the preferred grid template, clear the **Set As Preferred Grid Template** box.

   By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.
8. Click **Submit**.

   The bulk creation of grid matrix templates may take some time to process. To monitor the status, go to Lists > Grid Order Entry > Grid Template Creation Log.

Creating a Copy of the Grid Matrix Template

You can create copies of a grid matrix template for the same item. All template and item information are copied, except for the template name. You can edit the details of the copy before saving the template.

To create a copy of a grid matrix template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. In the Grid Templates list, click **View** beside the grid template that you want to copy.

3. On the Grid Matrix Template page, click **Make Copy**.

   This button is only available in View mode.

4. On the template copy, enter a name for the grid matrix template.

   You can update the **Name**, **Description**, **Available In**, and **Percent** fields.

   You can also check or clear the **Set As Preferred Grid Template** box. By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.

5. Click **Save**.

For more information, see Creating a Single Grid Matrix Template.

Assigning a Preferred Grid Template

Setting a preferred grid template streamlines the process of assigning a grid template for each matrix item. This feature is available for matrix items, including assembly, lot numbered assembly, serialized assembly, inventory, lot numbered inventory, and serialized inventory items.

You can use the following methods to assign a preferred grid template:

- **Through the item record** – See Assigning a Preferred Grid Template Using the Item Record.
- **Through CSV Import** – See Assigning a Preferred Grid Template Using CSV Import.
- **Through creating or editing a grid matrix template** – See Creating a Single Grid Matrix Template and Creating Grid Matrix Templates in Bulk.

Assigning a Preferred Grid Template Using the Item Record

You can set a preferred grid template for matrix items when you edit the item record.

Guidelines for Assigning a Preferred Grid Template Using the Item Record

Note the following guidelines when you assign a preferred grid template using the item record:

- Assigning a preferred grid template using the item record is optional for parent and child matrix items.
- If a parent matrix item has a preferred grid template, its existing child matrix items inherit the same template.
- A new or existing child matrix item can have a different preferred grid template from its parent matrix item.
- A new child matrix item, which is created after assigning a preferred grid template to its parent matrix item, also inherits its parent's preferred grid template.
- You can only update the **Preferred Grid Template** field of the item record in Edit mode.
- You can assign a preferred grid template to the following matrix item types:
  - Assembly/Bill of Materials
    - Lot Numbered
    - Serialized
  - Inventory Items
    - Lot Numbered
    - Serialized

Follow these instructions to assign a preferred grid template using the item record.

To assign a preferred grid template using the item record:

1. Go to Lists > Accounting > Items.
2. Click **Edit** beside the matrix item.
3. On the **Custom** subtab, select a **Preferred Grid Template** from the list.
4. Click **Actions**, then select **Update Matrix**.

Assigning a Preferred Grid Template Using CSV Import

You can set a preferred grid template for matrix items using CSV Import.

Guidelines for Assigning a Preferred Grid Template using CSV Import

- Assigning a preferred grid template using CSV Import is optional for parent and child matrix items.
- If a parent matrix item has a preferred grid template, its existing child matrix items inherit the same template.
- A new or existing child matrix item can have a different preferred grid template from its parent matrix item.
- A new child matrix item, which is created after assigning a preferred grid template to its parent matrix item, also inherits its parent's preferred grid template.
- The CSV file must contain valid grid template IDs in the **Preferred Grid Template** column.
- When you create a new parent matrix item, you must leave the **Preferred Grid Template** field blank.
- When you update a parent matrix item and the **Preferred Grid Template** column in the CSV file is blank, the item inherits its latest preferred grid template. If there is no template assigned to the item, the field becomes blank.
- When you create a new child matrix item and the **Preferred Grid Template** column in the CSV file is blank, the item inherits its parent's preferred grid template. If there is no preferred grid template set for its parent, the field becomes blank.
- You can assign a preferred grid template to the following matrix item types:
  - Assembly/Bill of Materials
    - Lot Numbered
    - Serialized
  - Inventory Items
    - Lot Numbered
    - Serialized

Follow these instructions to assign a preferred grid template using CSV Import.

To assign a preferred grid template using CSV Import:

1. Create a CSV Import file for matrix items. For more information, see the help topic Setting Up Your CSV File for Matrix Items Import.

   The file must include the **Preferred Grid Template** column with valid grid template IDs. To view valid grid templates, go to List > Grid Order Entry > Grid Templates. Use the internal ID that corresponds to the grid template. To view the internal IDs, the **Show Internal ID** preference must be enabled. For more information, see the help topic Setting the Show Internal IDs Preference.
2. Go to Setup > Import/Export > Import CSV Records.
3. In the Scan & Upload CSV File step, do the following:
   a. In the **Import Type** field, select **Items**.

b. In the **Record Type** field, select **Assembly/BOM item** or **Inventory Item**.
c. Click **Browse** to locate and select your CSV file.
d. Click **Next**.

4. In the Import Options step, do the following:
   a. In the **Data Handling** field, select from the following options:
      - **Add** – Select this option to import new data.
      - **Update** – Select this option to update existing data.
      - **Add or Update** – Select this option to add new or update existing data.

   b. To display additional settings, expand **Advanced Options**.
   c. If you upload a CSV Import file that contains blank fields, you can check the **Overwrite Missing Fields** box. This action clears the value in the NetSuite fields mapped to the fields in the CSV file.
   d. To enable the data validations in the CSV file, check the **Run Server SuiteScript and Trigger Workflows** box.
   e. Click **Next**.
5. In the Field Mapping step, verify that the fields in the CSV file are mapped to the correct NetSuite fields and click **Next**.
6. In the Save Mapping & Start Import step, click **Run**.
7. To view the status of the import, click the **Import Job Status** link.

   The page displays **Complete** after a successful import. To check if there are errors in the import, click the **CSV Response** link.

For more information on CSV Imports, see the help topic Importing CSV Files with the Import Assistant.

Setting Up Grid Item Templates

To enter orders for multiple assembly and inventory items in the grid order, you must first configure items in a grid item template. Similar to grid matrix templates, grid item templates determine the categories and quantity distribution that are shown in the grid for an item.

Read the following topics to learn about setting up grid item templates:

- Setting Up Grid Attributes
- Setting Up Grid Attribute Values
- Applying Grid Attributes to Items
- Using Grid Item Templates

To understand setup guidelines and limitations, see Setting Up Grid Templates. For limitations related to Grid Order Management in general, see Limitations of Grid Order Management.

Setting Up Grid Attributes

Grid attributes define product categories or dimensions of an item. For example, a company that sells apparel can create attributes common to items like size, color, style, and cut.

You can use the Import Assistant to create and edit grid attributes. To enable data validations during import, go to Setup > Import/Export > CSV Import Preferences, and check the **Run Server SuiteScript and Trigger Workflows** box. For more information, see the help topic Importing CSV Files with the Import Assistant.

Creating Grid Attributes

To make a well-defined grid item template, you must create attributes for the hierarchical structure of categories, properties, characteristics, and dimensions of your items.

To create a grid attribute:

1. Go to Lists > Grid Order Entry > Define Grid Attribute > New.

   Alternatively, go to Lists > Grid Order Entry > Define Grid Attribute and click **New Grid Attribute**.
2. On the Grid Attribute page, enter a name for the attribute.
3. Click **Save**.

   The new grid attribute record is created.

Editing Grid Attributes

When you create a grid attribute, the record gets added to the Grid Attribute List. To view the list, go to Lists > Grid Order Entry > Define Grid Attribute. If the grid attribute is not mapped to an item used in a grid template, you can edit the grid attribute record.

To edit a grid attribute:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click **Edit** beside the grid attribute you want to modify.

   Alternatively, click the **Edit** button if you are already on the Grid Attribute page.
3. On the Edit Grid Attribute page, you can do any of the following:
   - In the **Name** field, you can change the grid attribute name.
   - To delete the grid attribute record, select **Delete** from the Actions list.

     You cannot delete the record if the grid attribute is mapped to an item that is assigned to a grid template.
4. Click **Save**.

Setting Up Grid Attribute Values

Grid attribute values are created to represent the available options for each grid attribute. For example, the grid attribute for size can include small, medium, and large as its grid attribute values.

Creating Grid Attribute Values

To make a well-defined grid item template, you must create grid attribute values that represent the range of available options for each attribute.

To create a grid attribute value:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click **Edit** beside the grid attribute.
3. On the Grid Attribute page, click the **Create New** icon and select **New Grid Attribute - Value**.
4. On the Grid Attribute - Value page, enter a name for the attribute value.
5. Click **Save**.

The new grid attribute value is created. You can only use unique grid attribute values. Duplicate values are not allowed.

Editing Grid Attribute Values

When you create a grid attribute value, the record gets added to the Grid Attribute – Value list.

To edit a grid attribute:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click **Edit** beside the grid attribute that contains the grid attribute value you want to modify.

   Alternatively, click the **Edit** button if you are already on the Grid Attribute – Value page.
3. On the Edit Grid Attribute – Value page, you can do any of the following:
   - In the **Value** field, you can change the grid attribute value.
   - To delete the grid attribute value record, select **Delete** from the Actions list.

     If the grid attribute value is mapped to an item that is assigned to a grid template, you cannot delete the record.
4. Click **Save**.

After creating the grid attribute and grid attribute value, you must apply the attribute to the item. For mapping instructions, see Applying Grid Attributes to Items.

Applying Grid Attributes to Items

To configure items in a grid item template, an item must first be mapped to its attributes. The system uses attributes to search for and organize the items in the grid item template. You can apply grid attributes to child matrix items if you want to assign item options to grid item templates.

There are three ways to map grid attributes to items:

- **Through the Item Record page** – This option is used to map a single grid attribute to a single item. For instructions, see Applying a Grid Attribute to an Item.
- **Through the Apply Attribute to Item page** – This option is used to map multiple grid attributes to multiple items. For instructions see Applying Multiple Grid Attributes to Items.
- **Through CSV Import** – This option is used to map grid attributes to items based on the values in the CSV Import file. For instructions, see the help topic Importing CSV Files with the Import Assistant.

Guidelines for Applying Grid Attributes to Items

Read the following guidelines for applying grid attributes to items:

- You can apply grid attributes only to inventory, assembly, and child matrix items.
- When using the Apply to Attribute Item page, the setup of your items may affect how they are shown in the Apply to Attribute popup list:
  - Item names that exceed the maximum of 180 characters may be shown incorrectly.
  - Complete item names are used, including all ancestors of an item. A sample of a complete item name is shown in this pattern – Parent 1: Child 1: Grand Child 1. Avoid using long names with minimal variation across parent and child items, which causes duplicate items to be shown. For example – LongItemName1: LongItemName2: LongItemName3.

For limitations of Grid Order Management in general, see Limitations of Grid Order Management.

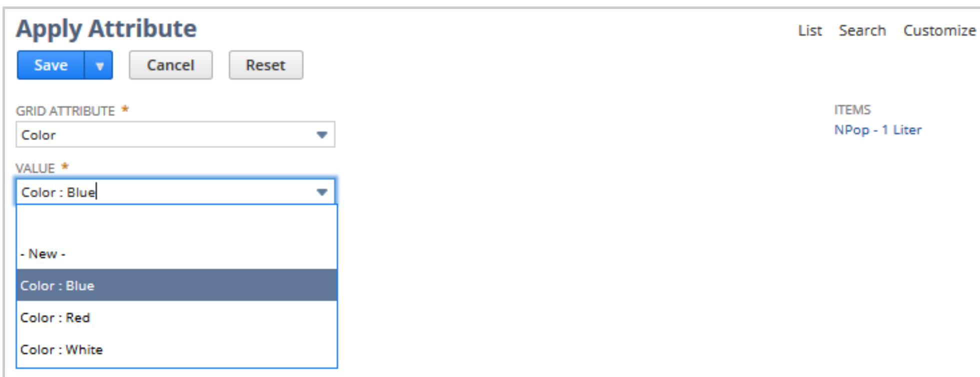
Applying a Grid Attribute to an Item

On the Item page, you can map a grid attribute – value to an item, one at a time. You can also change or delete the mapping, if the item has not been used in a grid template.

To apply a grid attribute to an item:

1. Go to Lists > Accounting > Items.
2. In the Items list, click the link for the item to be mapped.
3. On the Item page, click the **Grid Attribute** subtab.

   The attributes mapped to the item are shown in the list.
4. Click **New Apply Attribute**.
5. On the Apply Attribute page, select a grid attribute and attribute-value.

   When you select a grid attribute, only the associated attribute-values are included in the **Value** list. If you want to add a new attribute or value, select **New** from the list. The corresponding Grid Attribute or Grid Attribute-Value form is shown in a popup window. For instructions on completing the forms, see Setting Up Grid Attributes.
6. Click **Save**.

   Click **Save & New** if you want to apply another attribute to the item.

   If you need to change or delete a mapping, you can do the following on the **Grid Attribute** subtab:

   a. Click **Edit** beside the attribute you want to update. On the Apply Attribute page, select another attribute or attribute-value.
   b. If an item has not been assigned to a grid template, you can delete the grid attribute value applied to it. To remove the mapping, select **Delete** from the Actions list.

      To see the list of mappings, click the **List** link. On the Apply Attribute List page, the grid attribute, attribute-value, and item mappings are shown.
   c. Save your changes to the record.

Applying Multiple Grid Attributes to Items

The Apply Attribute to Item page enables you to map several attributes to items in one transaction.

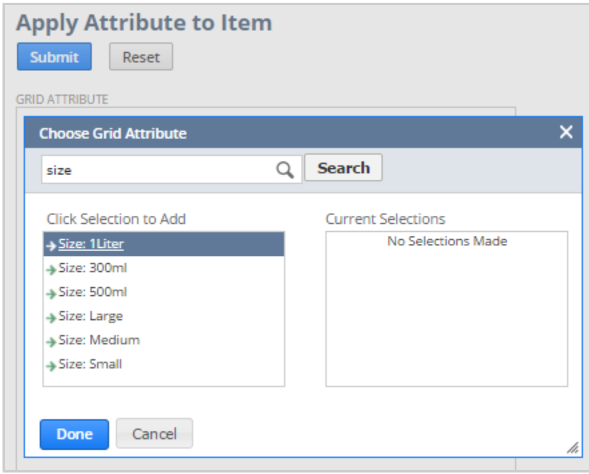
To apply multiple grid attributes to items:

1. Go to Lists > Grid Order Entry > Apply Attribute to Item.
2. To select grid attributes, click the double arrows beside the **Grid Attributes** pane.

3. In the Choose Grid Attribute popup list, select the grid attributes from the left pane.

   The grid attributes that you select are shown in the right pane. To remove an attribute from the Current Selections list, click its **x** icon.

   If there are too many attributes on the left pane, use the **Search** field to narrow down the list. For example, the following screenshot shows only the attributes with the word “size” in their name.

4. After selecting the grid attributes, click **Done** to close Choose Grid Attribute the popup list.
5. To select items, click the double arrows beside the **Items** pane.
6. In the Choose Item popup list, select the items from the left pane. These items will be mapped to the attributes you selected.
7. After selecting the items, click **Done** to close the Choose Item popup list.
8. After selecting grid attributes and items, click **Submit**.

   To clear all selections, click **Reset**.

The mapping of attributes to items may take some time to process, especially if you need to map multiple attributes to items. When the mapping is complete, each item record shows the corresponding attributes.

If you have access to the Script Deployment page, you can check the status of mapping process in the **Status** field.

Using Grid Item Templates

After you apply attributes to items, you can use the items in a grid item template. To place items in the grid, search for items by categories and assign grid attributes to the rows and columns. You can enter percentages for each item to be used in calculating the distribution of quantities across all items in the grid item template.

You can assign matrix item options to a grid item template if the items are mapped to grid attributes. For more information, see Applying Grid Attributes to Items. For guidelines and limitations when creating grid templates, see Setting Up Grid Templates.

Creating a Grid Item Template

Use the following procedure to create a grid item template.

To create a grid item template:

1. Go to the Grid Templates page.

- If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
- If you are using other roles, read Roles and Permissions for Grid Order Management.

2. On the Grid Templates page, click **New Grid Item Template**.
3. On the Grid Item Template page, enter values in the fields in the Grid Item Definition section:
    a. For OneWorld accounts, select a subsidiary in the **Subsidiary** field.
    b. Enter a name for the grid item template.
    c. In the **Description** field, enter a grid template description of not more than 300 characters.
    d. In the **Select Filter** field, select the grid attributes you want to use as filters for the items

    The **Select Filter** field lists all grid attributes. The values you select in this field are the first categories used to designate items on the template. These may be the primary requirements for the items you want to assign to the template. For example, if you want to create a grid item template for dresses and skirts of the same brand, select the attribute for the brand, as well as attributes for dresses and skirts. Sample grid attributes that you select as filters are Brand: Brand A, Apparel Category: Dresses, and Apparel Category: Skirts.
4. In the Grid Template section, enter the values in the fields.
    a. In the **Column Attribute** field, select the attribute you want to use as category for the grid columns. When an attribute is selected, the associated attribute values are listed in the **Column Values** field.
    b. In the **Column Values** field, select the attribute values for the grid columns. The system uses the attributes to search for items that are mapped to them. The names of the attribute values are shown in the grid as column labels.
    c. In the **Row Attribute** field, select the attribute you want to use as the category for the grid rows. When an attribute is selected, the associated attribute values are listed in the **Row Values** field.
    d. In the **Row Values** field, select the attribute values for the grid rows. The system uses the attributes to search for items that are mapped to them. The names of the attribute values are shown in the grid as row labels.

    Select column and row attributes from the **Select Filter** field. These filters further define the items you assign to the template. These values may designate a subset of the items that are initially defined by the attributes you selected as filters.

    There is no limit to the number of attributes or attribute values you can select. However, after you select the attributes, it is possible that the number of items returned will exceed the limit defined for the grid item template. If the number of retrieved items exceeds the limit, consider setting up more than one grid template to set up subsets of the items defined by the attributes in the **Select Filter** field.
5. Select the transactions where you want the grid template to be available.

    This enables you to open the Grid Order Entry form on the selected transactions.
6. Click **Get Item**.

    The retrieved items are shown in the grid with the following limitations:

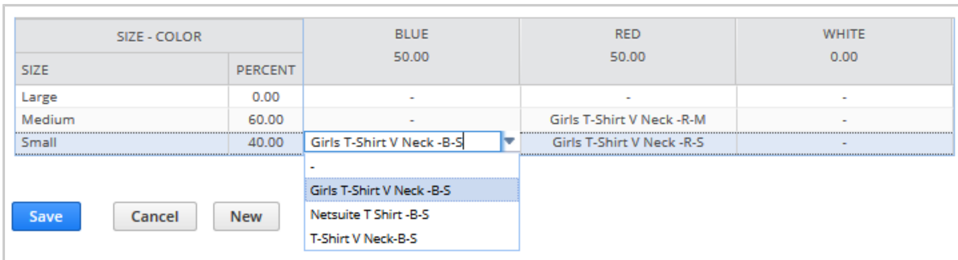
    - The row and column attribute values are arranged in alphabetical order by default. You can rearrange the columns by drag and drop.
    - Where multiple items are mapped to a cell, you can select the item you want from the dropdown list. You can also select a blank value.
    - A maximum of 200 values as grid attributes can be saved in the grid template. For more information, see Setting Up Grid Templates.
    - Same items in multiple cells are not allowed.

- Item records that have been assigned to a grid template cannot be deleted.

7. In the grid, enter the percentage of the total order quantity for each attribute value in the column and row heading.

   As you enter a percentage, the **Row** and **Column Percentage** fields display the total percentage. The computed total should be equal to 100 percent. The percentages defined on the item template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.

   If multiple items are retrieved for the attributes you selected, click the item in the grid cell to view the other options, and then select the item you want.



8. Click **Save**.

   Clicking **New** clears the fields and displays a blank form.

Editing a Grid Item Template

Use the following procedure to edit a grid item template.

To edit a grid item template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates list, click **Edit** beside the grid item template you want to update.
3. Edit the grid item template as needed. You can update the **Name**, **Description**, **Available In**, and **Percent** fields.

   To rearrange the grid, click and drag the column header and drop it on its new position.
4. Click **Save**.

Deleting a Grid Item Template

You can only delete a grid item template that is not being used in any order transaction.

If you use a Sales Person role, you cannot delete grid item templates. For more information, see Roles and Permissions for Grid Order Management.

Use the following procedure to delete a grid item template.

To delete a grid item template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.

    - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates list, click **Edit** or **View** beside the grid item template you want to delete.
3. Click **Delete**.

Managing Grid Orders

Use the grid templates that you have set up to add orders to your transactions. Grid order entry follows the standard procedures for creating order transactions. You can use one or more templates in a grid order. For more information, read the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

Guidelines for Creating Grid Orders

Read the following guidelines for creating grid orders:

- For better performance, add a maximum of 500 line items per transaction. You may encounter errors or slow processing when there are more than 500 line items in the transaction.
- Grid order entry does not include validation or autopopulation of values in standard mandatory fields, such as the Tax Code. This applies on the sales order form and custom mandatory fields for other SuiteApps.
- Item inventory count is based on the location that has been set in the transaction header if line-item locations is not used. Otherwise, item inventory count is based on line-item locations even if a location has been set in the transaction header. For more information about line-item locations, see the help topic Configuring Per-Line Locations for Transactions.
- If you use Multiple Currencies, values for the rate and amount of line items are initially based on the base price set as currency of the parent company. When grid items are added as line items, the values follow applicable multicurrency rules and are reflected on the Grid Order Entry form.
- On the Grid Order Entry form, row level price totals and price totals use the pricing assigned at the item level. The total order, including all items, is priced on the **Items** subtab and incorporates order level discounts. To view actual price totals on the Grid Order Entry form, click the **Open** link for the template on the **Items** subtab.
- If you use Demand Planning for grid sales orders that are submitted for the first time, the ship date that you entered on the Grid Order Entry form is assigned to all items in the grid.
- For grid inventory adjustments:
    - If you use Advanced Bin/Numbered Inventory Management, you cannot use grid item templates that only have lot numbered or serialized items. When you use grid item templates with different item types, the grid cells for serialized and lot numbered items are disabled.
    - If you enter **0** in a grid cell for a specific item, the item is not added to the transaction line item.

For general guidelines and limitations of Grid Order Management, see Limitations of Grid Order Management.

Entering Single Grid Orders

You can add orders to transactions using one template per Grid Order Entry form. To do this, ensure that the item price for all price levels and currencies have been set up in the item record. Items without a price cannot be added to the item sublist of a transaction. To review the guidelines for grid order entry, see Managing Grid Orders.

If you want to use multiple templates in one Grid Order Entry form for sales orders, see Entering Multi-Grid Orders.

To enter a grid order:

1. Go to Transactions > (Transaction type).

   Follow the standard path for creating the transaction. For example, to create a sales order, go to Transactions > Sales > Enter Sales Orders.
2. On the order page, enter values in the Primary Information and Classification sections as you would in a standard order transaction. On the order page, you can also enter values in the Sales Information section.

   For instructions on creating each of the order transactions, read the following topics:
   - Creating Sales Orders
   - Entering a Purchase Order
   - Entering a Transfer Order
   - Inventory Adjustments
   - Preparing an Estimate
3. Click the **Items** subtab, and then click **Open Grid**.

   Alternatively, you can add the parent matrix item on the **Items** subtab if the matrix item is already assigned to a grid matrix template. Ensure that your browser is set to enable popup lists from **system.netsuite.com** to use the Grid Order Entry popup form.

   The **Open Grid** button is available only to users who have access to the custom record types supported by Grid Order Management. For more information, see Roles and Permissions for Grid Order Management.
4. On the Grid Order Entry form, enter values in the Grid Order Information section.

   The following steps apply to single grid and multi-grid order entry.
   a. In the **Name** field, select the name for the grid item or grid matrix template.

      To use the **%** wildcard in the **Name** field, see Limitations of Grid Order Management for the supported combinations. Results may not be shown due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

      Based on your selected template, the **Type** and **Grid Attribute** fields are populated.
   b. Enter or select values based on the type of transaction.
      - **Sales orders and estimates** - In the **Expected Ship Date** field, enter the date you expect this item to be shipped from the vendor. You must enable the Demand Planning feature in your account to display this field.
      - **Inventory adjustments** - Select a location from the list of options, which are based on the subsidiary. You must enable the Multi-Location feature in your account to display this field.
      - **Transfer orders** - In the **Expected Receipt Date** field, enter the date when you expect to receive the item at the warehouse.

        If the Demand Planning feature is enabled in your account, enter the date in the **Expected Ship Date** field.
   c. Specify a value for the order priority in the **Order Priority** field.

      For sales orders, the default order priority set for the customer is initially shown. To assign an order priority to a transaction item, replace the default value in the **Order Priority** field.

If you edit the items of a sales order through Grid Order Entry, the default order priority set for the customer is used for added items. To change the order priority of added items, specify a value in the **Order Priority** column of the **Items** sublist.

Default order priority applies only to to sales orders and transfer orders.

5. Enter values in the Order Details section.

   The following steps apply to single grid and multi-grid order entry.

   If the **Enable Quantity Distribution** preference is selected on the Grid Preference page, perform steps **a** and **b**. For more information, see Setting Grid Order Management Preferences.

   Changes to values in the line items are reflected when you reopen the Grid Order Entry form. For more information, see Editing Grid Orders.

   a. In the **Order Quantity** field, enter your total order quantity.
   b. Click **Calculate**.

      The quantities are shown for each row and column cell based on the percentages set in the grid template, as well as all totals and inventory levels. Any order quantity that is more than the available quantity for the item is indicated in red.
   c. In the grid, click a cell to review information for that item.

      The Item Information section displays selected details from the item record, including the grid attribute values that show for the item.
   d. Review and specify rates.

Sales Orders:
For sales orders, the **Price Level** field on the Grid Order Entry form and the **Price Level** column in the Items sublist are available if the Multiple Pricing feature is enabled in your NetSuite account. By default, the **Edit Rate** box or **Edit Rate and Price Level** box is not checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Price Level** and **Rate** columns in the Items sublist (customer item pricing, group pricing, and customer pricing): ■ In accounts with the Multiple Pricing feature enabled, the **Estimated Rate** field shows the item price based on the selected price level: Price = Item Price Level starting from Base Price down to the Last Price Level (whichever has the first value) ■ In accounts without the Multiple Pricing feature: Price = Item.Base Price (baseprice) If the NetSuite item pricing hierarchy is used, it is possible that the values in the **Price Level** and **Estimated Rate** fields on the Grid Order Entry form do not match the values in the **Price Level** and **Rate** columns in the Items sublist. If you check the **Edit Rate** box or **Edit Rate and Price Level** box, then the system uses the value in the **Price Level** and **Estimated Rate** fields to populate the price level and rate values in the Items sublist. **To override the estimated rate:** ■ In accounts with Multiple Pricing enabled: 1. Check the **Edit Rate and Price Level** box. 2. Select a price level. 3. To enter a custom rate, select **Custom** in the **Price Level** field, then enter a rate in the **Estimated Rate** field. ■ In accounts without the Multiple Pricing feature 1. Check the **Edit Rate** box. 2. Enter a rate in the **Estimated Rate** field.

If you change the currency in the **Accounting** tab of the transaction, the **Estimated Rate** field displays the currency rate set in the item record. If the currency rate is not available, the exchange rate applies to the base currency of the customer record. The Quantity Pricing feature is not considered for the rate value.
Purchase Orders:
For purchase orders, the **Estimated Rate** field on the Grid Order Entry form shows the value that was saved in the **Purchase Price** field of the item record: Price = Item.Purchase Price (cost) By default, the **Edit Rate** box is not checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Rate** column of the Items sublist. If the NetSuite item pricing hierarchy is used, it is possible that the value in the **Estimated Rate** field does not match the value in the **Rate** column in the Items sublist. For example, if the vendor has a preferred purchase price on the item record, the system uses that price to populate the **Rate** column. If the **Edit Rate** box is checked, the **Estimate Rate** field becomes available for editing. The system then uses the value in the **Estimated Rate** field to populate the rate values in the Items sublist. **To override the estimated rate:** Check the **Edit Rate** box and enter a rate in the **Estimated Rate** field. If you change the currency in the **Accounting** tab of the transaction, the **Estimated Rate** field displays the currency rate set in the item record. If the currency rate is not available, the exchange rate applies to the base currency of the customer record. The Quantity Pricing feature is not considered for the rate value.

    e. To change an item quantity, click the cell, then enter the new value. Computed values in the grid are automatically recalculated when you change item quantities.

       If you select the **Enable Quantity Distribution**, you cannot edit the item quantities in the grid. Percentages must be changed in the grid template. For more information, see Setting Up Grid Matrix Templates and Using Grid Item Templates.

6. Click **Submit** to enter the grid order and return to the order transaction.
   - Click **Submit & New** if you want to save the grid order and then enter another one.
   - Click **Submit & Save** to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.
7. Verify the line items on the **Items** subtab of the Order Transaction page and click **Save**.

Guidelines for Editing Grid Items on the Order Transaction Page

Read the following guidelines for editing grid items on the Order Transaction page:

- Changing the percentage in the **Quantity** field of a line item overrides the percentages defined in the grid template.
- For grid inventory adjustments:
  - The new quantity value is automatically computed and shown in the line items.
  - You cannot enter the unit cost for new orders. The unit cost automatically reflects the average cost when you have saved a new order. You can change the default value of the unit cost.
  - If you use the Multi-Locations feature, changing the location of a grid line item automatically updates the location on the Grid Order Entry form.

Entering Multi-Grid Orders

Multi-Grid Order Entry preference enables you to enter orders in multiple grid templates on one Grid Order Entry form. You can combine grid matrix and item templates on a form. Orders are listed in the Order Summary, which is available only when creating multi-grid orders. For more information about the preference, see Setting Grid Order Management Preferences.

Guidelines for Entering Multi-Grid Orders

Read the following guidelines for entering multi-grid orders:

- You can enter multi-grid orders only for sales orders.
- If you use the Demand Planning feature, you can enter the expected ship date on the Grid Order Entry form. This date applies to all items across all grid templates used on the form.
  - If you want to combine orders in one form, it is best that they have the same expected ship date.
  - You can change the expected ship date of items in the line items of the sales order. Change the dates one item at a time.
- If you enter 0 in a grid cell when entering new orders in the grid, it is not added to the Order Summary. If you enter 0 or leave a grid cell blank when editing orders, the corresponding items are deleted from the Order Summary.
- Duplicate templates cannot be added to the Order Summary. When you enter new orders using a template that has been added to the Order Summary, the quantities in the existing template are updated. However, in the transaction sublist, items are submitted as new orders and not added to existing templates that have been used in other grid orders.
- After you have submitted a multi-grid order, you cannot view or edit it as a whole. You can edit submitted orders per template. For more information, see Editing Grid Orders.
- For limitations and guidelines when entering grid orders, see Managing Grid Orders.

Follow these instructions to enter multi-grid orders.

To enter multi-grid orders:

1. Go to Transactions > Sales > Enter Sales Orders.
2. On the Sales Order page, enter the details in the following sections: Primary Information, Sales Information, Classification. Specify the details as you would in a standard sales order transaction.

   For detailed instructions, see the help topic Creating Sales Orders.
3. On the **Items** subtab, click **Open Grid**.
4. On the Grid Order Entry popup form, enter or select the values in the following sections: Grid Order Information and Order Details.

   For detailed instructions, see steps 4 and 5 of Entering Single Grid Orders.
5. After entering the quantity of your orders in the grid template, click **Add to Order**. Your order is entered in the Order Summary table.
6. To enter orders in another template, select the grid template from the list in the **Name** field. Every time you change the template selection, the grid cells are cleared. For each grid template that you use, you must enter the orders in the Order Summary by clicking **Add to Order**.
7. Click **Submit** to enter your grid orders and return to the sales order.

   On the Sales Order page, you can review the items from the grid on the **Items** subtab. You can update the details for specific items or add more items to the transaction.

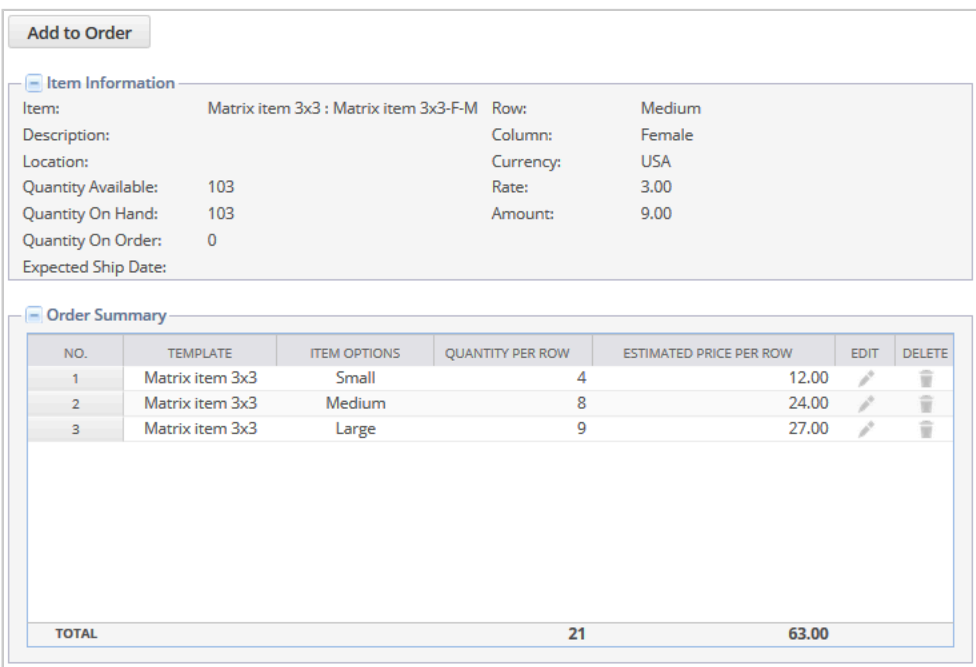
8. After completing the sales order, click **Save**.

Viewing Order Summary Details

You can view multi-grid orders in the Order Summary table before submitting them in the sales order. When you add orders to the table, each item option from the grid template is listed with the subtotal quantity of your order and estimated price. Refer to the following table for the list of Order Summary details:

Column Name	Description
No.	Line number of the row item option
Template	Name of the grid template where you entered the order for the item option
Item Options	Row item option listed in the **Matrix Item Options** column of the grid template
Quantity per Row	Subtotal quantity of your order per row item option
Estimated Price per Row	Estimated subtotal price of your order per row item option

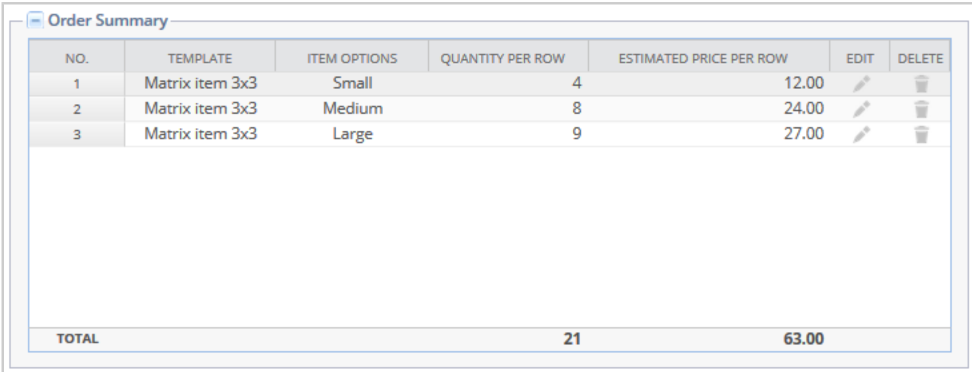
For reference, you can view the rate and quantity details in the Item Information table. For more information about the Order Summary table, see Viewing Order Summary Details. If you want to edit or delete orders from the Order Summary, see Updating Multi-Grid Orders. See the screenshot below for a sample summary.



Updating Multi-Grid Orders

Before submitting a multi-grid order, you can edit or delete orders that have been added to the Order Summary. Quantity and price values are automatically recalculated based on your updates. You can edit the submitted grid orders by editing the template. For more information, see Editing Grid Orders.

In the Order Summary table, the edit and delete icons for each item option are located in their respective columns.


Order Summary

NO.	TEMPLATE	ITEM OPTIONS	QUANTITY PER ROW	ESTIMATED PRICE PER ROW	EDIT	DELETE
1	Matrix item 3x3	Small	4	12.00		
2	Matrix item 3x3	Medium	8	24.00		
3	Matrix item 3x3	Large	9	27.00		
TOTAL			21	63.00		

- To edit a row item option, click its corresponding pencil icon in the **Edit** column.

  When you edit a row item option, the complete order is shown in the grid in Edit mode. Before editing a row item, ensure that there no entries in the grid that have not been added to the Order Summary table. All grid cells are cleared and replaced with values from the complete order.

  - Update the quantity of the row item, including other items in the order. If you change the value of a grid cell to 0 or leave it blank, the corresponding items in the Order Summary are deleted when you enter the updates.
  - To enter your updates in the Order Summary, click **Add to Order**.
- To delete a row item option, click its corresponding delete icon in the **Delete** column. The system displays a confirmation message. When you delete a row item option, the complete order is shown in the grid. In case you deleted the row item option by mistake, you can add it again to the Order Summary table.

  To delete the selected row item only, click **Delete Row**.

  To delete all rows that belong to the selected template, click **Delete Template**.

For more information about the Order Summary table, see Viewing Order Summary Details.

Editing Grid Orders

You can edit grid orders that have been submitted through single or multi-grid order entry.

Guidelines for Editing Grid Orders

Read the following guidelines for editing grid orders:

- Grid inventory adjustments cannot be edited.
- Changes to a grid template do not automatically reflect in the grid orders where the template is used. To update a grid order, you either manually edit it and reload the grid template, or manually enter the changes in the line items.
- Users that do not have grid access cannot edit items that have been added through grid orders. When they edit other items and details on the transaction, the grid item details are retained.
- The Order Summary table is not shown on the Grid Order Entry form in Edit mode.

- When you create sales orders from estimates with grid orders, the grid order is carried over. You can edit the item quantities in the grid of the sales order. When you convert estimates to transactions not supported by grid ordering, you can edit the order in the item sublist of transactions. For the list of transactions supported by grid order entry, refer to the table on Grid Order Management.

To view other guidelines for grid order entry, see Managing Grid Orders. To view specific guidelines when updating multi-grid orders, see Updating Multi-Grid Orders

Follow these instructions to edit grid orders.

To edit a grid order:

1. Go to Transactions > (Transaction type).

   Follow the standard path for editing the transaction. For example, to edit a sales order, go to Transactions > Sales > Enter Sales Orders.
2. In the list of orders, click **Edit** beside the transaction.
3. On the **Items** subtab of the order page, perform any of the following:
   - To enter a new grid order, click **Open Grid**.

     For instructions, read the following topics:
     - Entering Single Grid Orders
     - Entering Multi-Grid Orders

     The **Open Grid** button is only available to users who have access to at least one of the supported custom record types. For more information, see Roles and Permissions for Grid Order Management.
   - To edit an existing grid order, perform the following steps:
     1. In the **Grid Template** column, look for the grid template name used in the grid order.
     2. In the **Link** column, click the Open icon to display the existing grid order.
     3. On the Grid Order Entry form, you can make the following changes depending on the grid preferences defined in your account.
        - If you use the Enable Quantity Distribution preference, you can change the total order quantity. Enter the new value in the **Order Quantity** field, then click **Calculate**.
        - To change specific item quantities, click the cell, then enter the value. Percentages and total values are automatically recalculated.

        For grid inventory adjustments, setting the value of the cell to zero removes the corresponding grid line item from the transaction. For more information about grid preferences, see Setting Grid Order Management Preferences.
     4. Click **Submit**.
        - Click **Submit & New** if you want to save the grid order and then enter another grid order.
        - Click **Submit & Save** to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.
   - Click a line item to change or add values.

     Changing the percentage in the **Quantity** field of a line item updates the percentage in its associated grid template when you open the grid.
   - Apply line item discounts.
   - Remove line items. To remove all transaction lines from the order, click **Clear All Lines**.
4. After completing the changes, click **Save** on the order page.

Importing Grid Orders

You can import the data for grid purchase order and sales order transactions using the following methods:

- CSV Imports for Grid Purchase Order and Sales Order Transactions
- SOAP Web Services Support for Grid Purchase Orders and Grid Sales Orders

CSV Imports for Grid Purchase Order and Sales Order Transactions

You can use the CSV Import method to import multiple grid purchase order and sales order transactions. When you import these transactions, you may view and print the transaction using the grid template assigned to the item records. Read the following topics to learn more:

- Grid Item ID Assignment
- Grid Template Assignment
- Viewing the Grid for the Item Record
- Printing Transaction Records Using the Grid Template

Guidelines for Importing Grid Purchase Order and Sales Order Transactions

Read the following guidelines for importing grid purchase order and sales order transactions:

- You can only import up to 100 distinct grid templates for each transaction.
- The system automatically assigns the value of the **Grid Item ID** and **Grid Template** fields for assembly and inventory matrix items in the transaction. These fields are no longer required in the CSV Import file.
- If the value of the **Grid Item ID** field is specified in the CSV Import file, the value gets ignored.
- The value of the **Grid Template** field is based on the current preferred grid template assignment in the item record. If you want to manually assign the grid template, ensure that the field in the CSV Import file contains the valid internal ID of the grid template.

Grid Item ID Assignment

When you use CSV Import for grid purchase order and sales order transactions, the grid item ID assignment for assembly and inventory matrix items depends on the following fields:

- **Item** – This field is located in the CSV Import file.
- **Grid Item ID** – This field is located in the CSV Import file.
- **Grid Template** – This field is located in the CSV Import file.
- **Available In** – This field is located on the Grid Matrix Template page.
- **Preferred Grid Template** – This field is located on the **Custom** subtab of the item record.

The SuiteApp examines the row sequence of the **Item** field and its corresponding **Grid Template** in your CSV Import file.

The row sequence of the **Item** field determines if they are the same or different items. The row sequence of the **Grid Template** field determines if the items are grouped or ungrouped.

The value of the **Grid Item ID** in the item record also depends on the item's current **Preferred Grid Template** setup. The grid template must include the order transaction in its **Available In** field.

To identify the item's grid item ID assignment, you may refer to the following table of scenarios:

Scenarios	Grid Template Grouping	Grid Template Applicable? (1)	Sample Item and Grid Template Input in the CSV Import File	Grid Item ID Assignment in the Transaction Record
Three same items with the same template	Grouped	Y	Item A, Grid Template N Item A, Grid Template N Item A, Grid Template N	Grid Item ID 1 Grid Item ID 2 Grid Item ID 3
Three different items with different templates	Ungrouped	Y	Item A, Grid Template N Item B, Grid Template O Item C, Grid Template P	Grid Item ID 1 Grid Item ID 2 Grid Item ID 3
Three different items with the same template	Grouped	Y	Item A, Grid Template N Item B, Grid Template N Item C, Grid Template N	Grid Item ID 1 Grid Item ID 1 Grid Item ID 1
Three different items with different templates ▪ Two different items with the same template ▪ One different item with a different template in between	Ungrouped	Y	Item A, Grid Template N Item C, Grid Template O Item B, Grid Template N	Grid Item ID 1 Grid Item ID 2 Grid Item ID 3
Three different items with different templates ▪ Two different items with the same template ▪ One item with a different template	Grouped	Y	Item A, Grid Template N Item B, Grid Template N Item C, Grid Template O	Grid Item ID 1 Grid Item ID 1 Grid Item ID 2
Three different items with the same template	Grouped	Y	Item A, Grid Template N	Grid Item ID 1 Grid Item ID 2 Grid Item ID 2

Scenarios	Grid Template Grouping	Grid Template Applicable? (1)	Sample Item and Grid Template Input in the CSV Import File	Grid Item ID Assignment in the Transaction Record
■ Two same items with the same template ■ One different item with the same template			Item A, Grid Template N Item B, Grid Template N	
Three different items with different templates ■ Two different items with the same template ■ One different item with no grid template in between	Ungrouped	Y	Item A, Grid Template N Item B, No Grid Template Item C, Grid Template N	Grid Item ID 1 Nongrid (2) Grid Item ID 2
Three different items with different templates ■ Two different items with the same template ■ One item with a grid template that is not applicable to the transaction in between	Ungrouped	N	Item A, Grid Template N Item D, Grid Template is not applicable to the transaction Item C, Grid Template N	CSV Import failure. The system will display an error message in the CSV response.
(1) Grid Template Applicable determines if the **Preferred Grid Template** used includes the order transaction in the **Available In** field. (2) Nongrid refers to an item that does not display in grid format.				

Grid Template Assignment

When you use CSV Import for grid purchase order and sales order transactions, the grid template assignment for assembly and inventory matrix items depends on the following fields:

- **Grid Item ID** – This field is located in the CSV Import file.
- **Grid Template** – This field is located in the CSV Import file.
- **Preferred Grid Template** – This field is located on the **Custom** subtab of the item record.

To identify the grid template assignment in the transaction record, you may refer to the following table of scenarios:

Grid Item ID Input in the CSV Import File	Grid Template Input in the CSV Import File	Preferred Grid Template Input in the Item Record	Grid Template Assignment in the Transaction Record
Blank	Blank	With Value	Preferred Grid Template
Blank	With Value	Blank	Grid Template
Blank	Blank	Blank	Nongrid (2)
Blank	With Value	With Value	Grid Template
With Value(1)	Blank	With Value	Preferred Grid Template
With Value (1)	With Value	Blank	Grid Template

Grid Item ID Input in the CSV Import File	Grid Template Input in the CSV Import File	Preferred Grid Template Input in the Item Record	Grid Template Assignment in the Transaction Record
With Value (1)	Blank	Blank	Nongrid (2)
With Value (1)	With Value	With Value	Grid Template
(1) The system ignores any value given to the **Grid Item ID** in the CSV Import file. (2) Nongrid refers to an item that does not display in grid format.			

For more information on CSV Imports, see the help topic Importing CSV Files with the Import Assistant.

Viewing the Grid for the Item Record

After importing grid purchase orders and sales orders using CSV Import, the transactions appear on the Purchase Orders and Sales Orders pages respectively. You can view the templates associated to the item records in the transaction.

To view the grid for the item record:

1. Go to Transactions > Purchases > Enter Purchase Orders > List or Transactions > Sales > Enter Sales Orders > List, depending on the selected transaction type.
2. On the transactions list, search for the transaction from your CSV Import file and click **Edit**.
3. On the **Items** subtab, the items included in the transaction are listed. To view the grid for the item, scroll to the right and click the icon in the **Link** column.

Printing Transaction Records Using the Grid Template

After importing grid purchase orders and sales orders using CSV Import, you can print the transaction using the grid template assignment.

To print the transaction record:

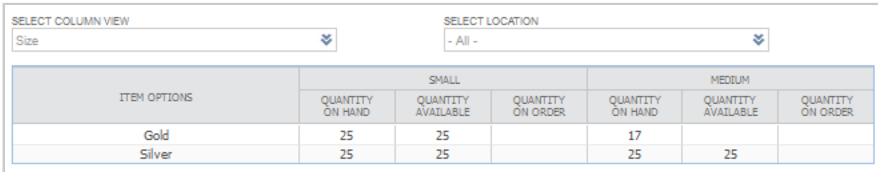
1. Go to Transactions > Purchases > Enter Purchase Orders > List or Transactions > Sales > Enter Sales Orders > List, depending on the selected transaction type.
2. On the transactions list, search for the transaction from your CSV Import file and click **View**.
3. Click **Print Grid**.

SOAP Web Services Support for Grid Purchase Orders and Grid Sales Orders

SOAP web services is another method to import transactions to your account. For more information on using SOAP web services, see the help topic SuiteTalk SOAP Web Services Platform Overview.

Viewing the Grid Matrix Information

Grid Order Management enables you to view item quantities and stock levels in grid format. On parent matrix item records, the **Grid Matrix Information** subtab displays the following item details for the parent and its child items: Quantity on hand, Quantity available, and Quantity on order. For information about these item quantities, see the help topic Assessing Stock Levels.



ITEM OPTIONS	SMALL			MEDIUM		
	QUANTITY ON HAND	QUANTITY AVAILABLE	QUANTITY ON ORDER	QUANTITY ON HAND	QUANTITY AVAILABLE	QUANTITY ON ORDER
Gold	25	25		17		
Silver	25	25		25	25	

Guidelines for Viewing Grid Matrix Information

Read the following guidelines for viewing matrix items in grid format:

- The **Grid Matrix Information** subtab is available on parent matrix item records for assembly and inventory items only.
- In the grid, take note of the following behaviors:
  - Items with no quantities are left blank.
  - Quantities or grid cells that are shaded gray indicate that the items are inactive or do not exist. For OneWorld accounts, this could indicate that items cannot be accessed within your subsidiary.
  - If you use Multiple Units of Measure and a stock unit setting, grid item quantities are shown in base unit.
  - There is a maximum limit of 500 items that can be shown in the grid. Exceeding this limit causes values in columns to overlap.
- Considerations for matrix item options:
  - Item options are assigned to rows and columns in alphabetical order. The first and any succeeding item options are assigned as rows. The last item option is assigned as the column. To replace the default column, see Changing the Item Column Display.
  - Item option values are arranged based on settings and order of entry on the custom list of matrix options. For more information, see the help topic Setting up an Item Matrix.
  - If you use numerical values for an item option, add a **0** to single digits to retain the order.
  - If only one item option has been set up for the parent matrix, no grid information can be shown.
  - Updates to matrix item options are automatically reflected in the grid.

Changing the Item Column Display

You can change the item option shown in the column headers. From the list in the **Select Column View** field, select the item option you want to assign. The replaced item option is automatically assigned to the row and quantities.

Filtering Items by Location

If you use Multi-Location Inventory, you can view items from multiple locations available in your account. For OneWorld accounts, subsidiary locations are included. If your role does not have access to a subsidiary, you can view items based on the subsidiary on your employee record.

By default, item quantities from all locations are shown in the grid. To narrow the results, select the specific location of items to be shown in the **Select Location** field.

To use the **%** wildcard in the **Name** field, see Limitations of Grid Order Management for the supported combinations. Results may not be shown due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

If you want to switch to another location, click the double down arrows to see the list of all locations. Alternatively, you can enter the location name in the field to display the list of matching locations.

Grid Printing

Before you use grid printing, ensure that your account is updated with the required features and permissions. To learn more about the requirements, read the following topics:

- Prerequisites for Grid Order Management
- Roles and Permissions for Grid Order Management

For instructions on how to set the preferences for grid printing, see Setting Grid Printing Preferences.

Grid Printing Options

You can use grid printing to display relevant transaction information into a single file. There are two options in grid printing: Standard Grid Order Printing and Grid Print Templates.

Both printing options use the same method of assigning a template for each transaction. On the Grid Preferences page, the grid print template refers to the XML files on the **Grid Printing** subtab. These templates control how the elements in the printout appear in the PDF file. You can select a template for the following transactions:

- Cash sale
- Invoice
- Packing slip
- Picking ticket
- Purchase order
- Quote
- Sales order

With grid print templates, the grid tables display matrix items according to the grid template assignment. The printout also shows a consolidated item list to display other items in the transaction that do not belong to the grid table.

You can customize these grid print templates according to your printing preferences.

Guidelines for Grid Printing

Read the following guidelines for grid printing:

- Both standard grid order printing and grid print template options generate printouts in PDF format. Each PDF has a maximum file size of 10 MB.

- The default page orientation is in portrait mode. If the transaction contains extremely long field values, text wrapping may occur in the document. You can edit the grid print template to adjust the column width. For more information, see Customizing the Printout using Advanced PDF/HTML Templates.
- The printout header contain addresses in the company, vendor, billing, and shipping information. Using the Address subrecord, you can edit these addresses to include additional details, such as phone and email. For more information, see the help topic About the Address Subrecord.
- You must first assign a grid template for matrix items to appear on the grid table in the printout.
- For invoice, packing slip, picking ticket, purchase order, and sales order, the maximum number of column attributes for each grid table is six. Meanwhile, for cash sale and quote, the maximum is five. When the grid template exceeds the number of column attributes allowed, the printout will display multiple grid tables.
- You can display child matrix items, which belong to the same parent matrix item, into different grid tables. For more information, see Assigning a Preferred Grid Template Using the Item Record.
- The number format in the printout follows your user preferences. If you want to change the number formats, select your preferred settings in the **Number Format** and **Negative Number Format** lists on the Set Preferences page. For more information, see the help topic General Personal Preferences.
- You can personalize how amounts appear in the printout. If the Multiple Currency feature is enabled, you can change the default currency format in the currency record. If the Multiple Currency feature is disabled, you can adjust the default currency format in the Company Information page. Check the **Override Currency Format** box to show the **Currency Symbol** and **Symbol Placement** fields. For more information, see the help topic Customizing Currency Formats.
- Single transaction grid printing is available only in view mode of the supported transaction records. Grid printing is not available on the Print Checks & Forms page.

For other considerations and limitations, see Limitations of Grid Order Management.

Standard Grid Order Printing

Standard grid order printing refers to the type of printing used in purchase order and sales order transactions.

As you create or edit the transaction, you can use the Grid Order Entry feature to select the appropriate grid template for matrix items on the transaction record.

When you use CSV Import, the system automatically assigns the **Grid Item ID** and **Grid Template** values based on the **Preferred Grid Template** field on the item record. You can assign a different grid template using the **Grid Template** column in your CSV Import file. For more information, see Importing Grid Orders.

You can use either grid matrix templates or grid item templates to create the grid table for matrix items in the printout. Nongrid matrix items appear in the item list following the grid tables.

Grid Print Templates

Aside from the XML files on the Grid Preferences page, the grid print template also refers to the grid printing option used for other supported transactions. These transactions are created outside the Grid Order Entry feature. Cash sale, invoice, packing slip, picking ticket, and quote transaction records use this type of grid printing.

For packing slips, grid print templates apply only for item fulfillments created from sales order and transfer order transactions.

Unlike in standard grid order printing, you can only use grid matrix templates to create the grid table for matrix items in the printout. Nongrid matrix items appear in the item list following the grid tables. This list includes items that use grid item templates.

The following table outlines the differences between standard grid order printing and grid print template options.

Concept	Standard Grid Order Printing	Grid Print Template
Supported transaction records	■ Purchase Order ■ Sales Order	■ Cash Sale ■ Invoice ■ Packing Slip ■ Picking Ticket ■ Quote
Setting the grid print template	■ **For purchase order** – wd_gom_template_pogridprintout.xml ■ **For sales order** – wd_gom_template_sogridprintout.xml	■ **For cash sale** – wd_gom_template_csgridprintout.xml ■ **For invoice** – wd_gom_template_ivgridprintout.xml ■ **For packing slip** – wd_gom_template_psgridprintout.xml ■ **For picking ticket** – wd_gom_template_ptgridprintout.xml ■ **For quote** – wd_gom_template_qtgridprintout.xml
Using grid templates	You can use either grid matrix templates or grid item templates to create the grid table.	You can only use grid matrix templates to create the grid table.
Creating the transaction using Grid Order Entry	When you create the transaction using Grid Order Entry, the grid table depends on the **Grid Item ID** and **Grid Template** field values. These fields are located on the **Items** subtab of the transaction record. For more information, see Entering Single Grid Orders.	The Grid Order Entry feature is not available for transactions using this grid printing option.
Creating the transaction using CSV Import	When you create the transaction using CSV Import, the grid table depends on the **Grid Item ID** and **Grid Template** field values. These fields are located on the **Items** subtab of the transaction record. For more information, see Importing Grid Orders.	For transactions using this option, the **Grid Item ID** and **Grid Template** fields on the **Items** subtab are irrelevant to the grid table. These fields are either ignored or do not exist in the transaction record. The grid table only displays items that have an assigned grid matrix template. To confirm the template assignment, go to the item record. On the **Custom** subtab, verify that the **Preferred Grid Template** field value is a grid matrix template. If the **Preferred Grid Template** field is blank, the oldest grid matrix template on the Grid Templates page becomes the template.
Manually adding items using the **Items** subtab in	When you manually add items on the **Items** subtab of the transaction record, the **Grid Item ID** and **Grid Template** fields are blank and	For cash sales, invoices, picking tickets, and quotes, manually added items appear in the grid table only if the items have an assigned grid matrix template.

Concept	Standard Grid Order Printing	Grid Print Template
the transaction record	disabled. Therefore, these items appear on the item list in the printout.	For packing slips, you cannot add items using the **Items** subtab of the transaction record.
Button Labels	For purchase orders and sales orders, use the **Print Grid** button.	For cash sales, invoices, and quotes, use the **Print Grid** button. For packing slips, use the **Print Grid Packing Slip** button. For picking tickets, use the **Print Grid Picking Ticket** button.
Mapping fields in grid print templates	For purchase orders, see Purchase Order Printout Fields. For sales orders, see Sales Order Printout Fields.	For invoices, see Invoice Printout Fields. For packing slips, see Packing Slip Printout Fields. For picking tickets, see Picking Ticket Printout Fields.
Identifying the grid print template elements	See Grid Table for Standard Grid Order Printing.	See Grid Table for Grid Print Templates.

Single Transaction Grid Printing

You can use grid printing to generate a PDF file that contains a single transaction record. The printout contains relevant data from the record, such as company information, order details, and a summary of quantity and amounts.

You can print single transactions using the appropriate print button, which appears only in view mode.

To print a single transaction using grid printing:

1. Go to the transactions list page.
   - For invoices, go to Transactions > Sales > Create Invoices > List.
   - For packing slips, go to Transactions > Sales > Fulfill Orders > List.
   - For picking tickets and sales orders, go to Transactions > Sales > Enter Sales Orders > List.
   - For picking tickets from transfer orders, go to Transactions > Inventory > Enter Transfer Orders > List.
   - For purchase orders, go to Transactions > Purchases > Enter Purchase Orders > List.
2. On the transaction list page, click **View** beside the record you want to print.
3. On the transaction record page, click the appropriate print button.
   - For Invoices, purchase orders, and sales orders, click **Print Grid**.
   - For picking tickets, click **Print Grid Picking Ticket**.
   - For packing slips, click **Print Grid Packing Slip**.

   The system opens a preview of the printout in an Adobe application document.
4. Click the printer icon in the Adobe application frame and choose your print settings.
5. Click **Print**.

Bulk Grid Printing

Bulk grid printing is available only for transactions where you use grid print templates. You can generate a PDF file that contains multiple transactions for printing. For information about grid print templates, see Grid Print Templates.

Guidelines for Bulk Grid Printing

Read the following guidelines for bulk grid printing:

- File generation for more than 200 transactions may take more than an hour to complete. To lessen the processing time, reduce the number of transactions.
- To avoid exceeding the allowed script governance and PDF file size limit of 10 MB, separate files are generated automatically when printing a large number of transactions. For more information, see the help topic Script Type Usage Unit Limits.
- On the Bulk Grid Printing page, the maximum number of rows shown in the sublist per page depends on your general preference setting for list segments. For more information, see the Optimizing NetSuite section in the topic, General Personal Preferences.
- Email notifications about the outcome of the generated files are routed based on your email recipient preference. For information about this preference, see Setting Grid Order Management Preferences.

Follow these instructions if you want to use bulk grid printing.

To print transactions in bulk using grid printing:

1. Go to Lists > Grid Order Entry > Bulk Grid Printing.
2. In the **Document Type** field on the Bulk Grid Printing page, select the form or transaction type of the records to be printed.

   Use the available filtering and printing options:

Field Name	Description
Date From / Date To	Enter the start and end of the date range in their respective fields. The order date is used for filtering the documents, except for packing slips where the ship date is used. - Use Date From without Date To, if you want to retrieve all documents based on or later than the start date. - Use Date To without Date From, if you want to retrieve all documents based on or earlier than the end date.
Location	Select the location of the documents you want to retrieve. Only locations in the transaction header are available for selection. For packing slips, filtering by location is not applicable. - Selecting **All** retrieves documents across all locations and includes those without location settings in the transaction header. - Selecting **None** retrieves only documents without location settings in the transaction header.
Allow Reprinting	Check the box to retrieve documents that have been previously printed. Otherwise, these documents are not included in your search results.

Changing filtering options automatically displays new results and clears any selected records from your previous results. View the number of retrieved records in the **Total** field, located above the sublist header.

3. Check the box for the records you want to include in the bulk grid printing file.

   Click the **Mark All** button to select all records on the current page. You can do the same for records on any succeeding pages. Click the **Unmark All** button to clear records across all pages.

   View the number of currently selected records in the **Selected Records** field.

4. Click **Print**.

   To clear the filter and any selected records across all pages, click **Reset**.

   The scheduled script that generates the bulk grid printing files is queued for processing. On the information banner at the top of the page, you can click the link to view the processing status. You are redirected to the Bulk Grid Printing Status page where you can monitor the progress. After the files have been generated, look for the log record in the sublist to view the PDF file and processing details:

   - In the **File Link(s)** column, click the link to view and print the PDF file.
   - In the **Error Detail(s)** column, you can view information about errors encountered during processing.

   For more information about bulk grid printing logs, see Viewing and Maintaining Bulk Grid Printing Logs.

Viewing and Maintaining Bulk Grid Printing Logs

Read the following topics on how to view and maintain bulk grid printing logs:

- Viewing Bulk Grid Printing Logs
- Viewing Bulk Grid Printing Files
- Deleting Bulk Grid Printing Logs and Files

Viewing Bulk Grid Printing Logs

You can view the bulk grid printing log records that contain links to the PDF file and processing details.

In case of errors encountered during bulk grid printing file generation, a user with the Administrator role can view the log records for any error details. To see more information about a specific error, administrators can view the script execution logs by going to Customization > Scripting > Scripts Customization > Scripting > Scripts.

To view bulk grid printing logs:

1. Go to Lists > Grid Order Entry > Bulk Grid Printing Status.

   On the Bulk Grid Printing Status page, all existing log records are shown.

2. Use the available filtering options to narrow down the list of bulk grid printing logs.

Field Name	Description
Document Type	Select the form or transaction type of the files associated with the bulk grid printing logs.

Field Name	Description
Status	Select the bulk grid printing status of the files associated with the logs.
Date From / Date To	Enter the start and end of the date range in their respective fields. The date in the print timestamp is used to filter the bulk grid printing logs. ■ Use Date From without Date To, if you want to retrieve all records based on or later than the start date. ■ Use Date To without Date From, if you want to retrieve all records based on or earlier than the end date.
Printed By	For Administrators, you can click one or more users from the list to retrieve all associated logs. Only users, both active and inactive, who have submitted bulk grid printing requests are included in the list. Only administrators can use the **Printed By** filter. Only they can view the logs for PDF files they print.

Changing filtering options automatically displays new results and clears any selected records from your previous results. View the number of retrieved records in the **Total** field, located above the sublist header.

To reload the bulk grid printing logs and clear the selected records, click **Refresh**.

After filtering and viewing the bulk grid printing logs, you can view the files for printing or delete log records.

Viewing Bulk Grid Printing Files

The generated PDF files are attached to their log records. In the **File Link(s)** column of a log record, click one or more PDF files to view and print.

Use the PDF filename to help you find which files to print. PDF filenames have the following format:

- `Printout_<document type>_<print timestamp>.pdf`
- If multiple files are generated, the following suffix is added to the filename: `_<file sequence number>`.

Deleting Bulk Grid Printing Logs and Files

On the Bulk Grid Printing Status page, do either of the following:

- To delete selected logs and files, check the box beside each record and then click **Delete**.
- To delete all retrieved logs and files shown on the current page, click **Delete All Logs & Files**.

Bulk grid printing logs and files that are already being processed cannot be deleted.

Customizing the Grid Print Templates

On the **Grid Printing** subtab of the Grid Preferences page, you can select the standard grid print templates available in your account.

You can further customize the layout of the document by creating custom templates based on these standard grid print templates.

An administrator or developer with knowledge of FreeMarker and JSON codes can create these custom templates.

The following table shows the recommended steps to customize the grid print templates for selected transaction records.

<table>
<tr><th>Step</th><th>Procedure</th></tr>
<tr><td>1. Download the standard grid print template from the File Cabinet.</td><td><h3>To download the standard grid print template:</h3>

Go to Documents > Files > File Cabinet.
Go to the SuiteBundles > Bundle 41296 > src > template > GridPrinting folder.
Click the Download link beside the grid print template that you want to customize:

wd_gom_template_csgridprintout.xml – for cash sale
wd_gom_template_ivgridprintout.xml – for invoice
wd_gom_template_pogridprintout.xml – for purchase order
wd_gom_template_psgridprintout.xml – for packing slip
wd_gom_template_ptgridprintout.xml – for picking ticket
wd_gom_template_qtgridprintout.xml – for quote
wd_gom_template_sogridprintout.xml – for sales order

</td></tr>
<tr><td>2. Edit the template and save as a new custom grid print template.</td><td>For information on the available printout fields and grid print template elements, read the following topics:

Identifying the Printout Fields
Identifying the Grid Print Template Elements
</td></tr>
<tr><td>3. Upload the custom grid print template to the File Cabinet.</td><td><h3>To upload the custom grid print template:</h3>

Go to Documents > Files > File Cabinet.
Go to the Templates > Grid Printing Templates folder.
Click Add File and select the custom grid print template file from your computer.
</td></tr>
<tr><td>4. Select the custom grid print template on the Grid Preferences page.</td><td><h3>To select the custom grid print template:</h3>

Go to Lists > Grid Order Entry > Set Grid Preferences.
On the Grid Printing subtab, select the custom grid print template you created for the transaction.
Click Save.

For more information, see Setting Grid Printing Preferences.</td></tr>
</table>

Identifying the Printout Fields

The printout contains various fields that depend on the transaction record you print. To learn more about these printout fields, refer to the following tables.

- Purchase Order Printout Fields
- Sales Order Printout Fields
- Invoice Printout Fields
- Picking Ticket Printout Fields

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- Packing Slip Printout Fields

Purchase Order Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Purchase Order
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record
	Date	record.trandate	**Date** field value on the transaction record
	PO #	record.tranid	**Transaction ID** field value on the transaction record
	Receive By	record.duedate	**Receive By** field value on the transaction record
	Terms	record.terms	**Terms** field value on the **Billing** subtab of the transaction record
	Incoterm	record.incoterm	**Incoterm** field value on the **Billing** subtab of the transaction record
Vendor Information	Vendor:	record.billaddress	**Vendor Address** field value on the **Billing** subtab of the transaction record
Shipping Information	Ship To:	record.shipaddress	Company address on the Company Information record For drop-ship purchase orders, this field contains the shipping address on the **Shipping** subtab of the transaction record. For special order purchase orders created from a sales order, this field contains the shipping address on the related Sales Order record.
Grid Table	Grid Table Name	Any of the following: - item.custcol_gridoe_hidden_parentdispname (parent item's display name) - item.custcol_gridoe_hidden_parentname (parent item's item name) - gridData.name (item's grid template)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. For grid item templates, the **Grid Template** field value on the transaction record becomes the grid table name.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.

Section	Field Name	Field ID	Description
	Row Attribute Values	gridData.grid.data[n].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[n].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Calculated sum of amounts for each row attribute Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the grid table.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ■ item.vendorname (item's vendor name) ■ item.custcol_gridoe_hidden_displayname (item's display name) ■ item.item (item name)	The label for the name depends on the following conditions: ■ If the item’s **Vendor Name/Code** field value is available, this value becomes the name. ■ If the item’s **Vendor Name/Code** field value is blank, the item's **Display Name/Code** becomes the name. ■ If both **Vendor Name/Code** and **Display Name/Code** are blank, the **Item Name/Number** becomes the name.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Amount of each item Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction

Section	Field Name	Field ID	Description
			record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the item list.
Summary	Subtotal	-	Calculated sum of all grid table total amounts and item list total amounts
	Discounts	item.amount (Discount)	Calculated sum of all line-item and transaction discounts on the transaction record For more information on discount items, see the help topic Discount Items on the Help Center.
	Markups	item.amount (Markup)	Calculated sum of all markup items on the item sublist of the transaction record For more information on markup items, see the help topic Markup Items on the Help Center.
	Tax Total	record.taxtotal	**Tax Total** field value in the Summary section of the transaction record
	GST/HST	record.taxtotal	(For Canadian subsidiaries only) **GST/HST** field value in the Summary section of the transaction record
	PST	record.tax2total	(For Canadian subsidiaries only) **PST** field value in the Summary section of the transaction record
	Grand Total Quantity	-	Calculated sum of all item quantities on the transaction record
	Grand Total Amount	record.total	**Total** field value in the Summary section of the transaction record **Important:** The grand total amount may be different from the aggregate sum of amounts on the transaction, especially in cases where you use line item discounts and custom price levels.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for purchase order, see the help topic Standard Purchase PDF/HTML Template.

Sales Order Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Sales Order

Section	Field Name	Field ID	Description
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record
	Date	record.trandate	**Date** field value on the transaction record
	Order #	record.tranid	**Transaction ID** field value on the transaction record
	Terms	record.terms	**Terms** field value on the **Billing** subtab of the transaction record
	PO #	record.otherrefnum	**PO #** field value on the transaction record
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the transaction record
Billing Information	Bill To:	record.billaddress	**Billing Address** field value on the **Billing** subtab of the transaction record
Shipping Information	Ship To:	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the transaction record When the **Multiple Shipping Routes** feature is enabled, the **Enable Item Line Shipping** box is shown on the **Item** subtab of the sales order. This feature allows you to add different shipping addresses for each item in the Item sublist. If there are multiple shipping addresses available in the transaction, the **Ship To** field in the printout becomes hidden.
Grid Table	Grid Table Name	Any of the following: ▪ item.custcol_gridoe_hidden_parentdispname (parent item's display name) ▪ item.custcol_gridoe_hidden_parentname (parent item's item name) ▪ gridData.name (item's grid template)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. For grid item templates, the **Grid Template** field value on the transaction record becomes the grid table name.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.
	Row Attribute Values	gridData.grid.data[n].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[n].name	Column attributes on the grid template

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Section	Field Name	Field ID	Description
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Calculated sum of amounts for each row attribute Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the grid table.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: - item.custcol_gridoe_ hidden_displayname (item's display name) - item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Amount of each item Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the item list.
Summary	Subtotal	-	Calculated sum of all grid table total amounts and item list total amounts
	Discounts	item.amount (Discount)	Calculated sum of all line-item and transaction discounts on the transaction record

Section	Field Name	Field ID	Description
			For more information on discount items, see the help topic Discount Items on the Help Center.
	Markups	item.amount (Markup)	Calculated sum of all markup items on the item sublist of the transaction record For more information on markup items, see the help topic Markup Items on the Help Center.
	Tax Total	record.taxtotal	**Tax Total** field value in the Summary section of the transaction record
	GST/HST	record.taxtotal	(For Canadian subsidiaries only) **GST/HST** field value in the Summary section of the transaction record
	PST	record.tax2total	(For Canadian subsidiaries only) **PST** field value in the Summary section of the transaction record
	Shipping Total	record.altshippingcost + record.althandlingcost	Calculated sum of **Shipping Cost** and **Handling Cost** field values in the Summary section of the transaction record
	Gift Certificate	record.giftcertapplied	**Gift Certificate** field value in the Summary section on the transaction record
	Grand Total Quantity	-	Calculated sum of all item quantities on the transaction record
	Grand Total Amount	record.total	**Total** field value in the Summary section of the transaction record **Important:** The grand total amount may be different from the aggregate sum of amounts on the transaction, especially in cases where you use line item discounts and custom price levels.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for sales order, see the help topic Standard Sales Order PDF/HTML Template.

Invoice Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Invoice
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record

Section	Field Name	Field ID	Description
	Date	record.trandate	**Date** field value on the transaction record
	Invoice #	record.tranid	**Transaction ID** field value on the transaction record
	Due Date	record.duedate	**Due Date** field value on the transaction record
	Terms	record.terms	**Terms** field value on the **Billing** subtab of the transaction record
	PO #	record.otherrefnum	**PO #** field value on the transaction record
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the transaction record
Billing Information	Bill To:	record.billaddress	**Billing Address** field value on the **Billing** subtab of the transaction record
Shipping Information	Ship To:	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the transaction record
Grid Table	Grid Table Name	Any of the following: ▪ item.custcol_gridoe_hidden_parentdispname (parent item's display name) ▪ item.custcol_gridoe_hidden_parentname (parent item's item name)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. Items using grid item templates are shown on the item list.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.
	Row Attribute Values	gridData.grid.data[n].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[n].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Calculated sum of amounts for each row attribute Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of

Section	Field Name	Field ID	Description
			any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amountThis value is located at the bottom of the **Amount** column on the grid table.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ▪ item.custcol_gridoe_hidden_displayname (item's display name) ▪ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Amount of each item Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the item list.
Summary	Subtotal	-	Calculated sum of all grid table total amounts and item list total amounts
	Discounts	item.amount (Discount)	Calculated sum of all line-item and transaction discounts on the transaction record For more information on discount items, see the help topic Discount Items on the Help Center.
	Markups	item.amount (Markup)	Calculated sum of all markup items on the item sublist of the transaction record For more information on markup items, see the help topic Markup Items on the Help Center.
	Tax Total	record.taxtotal	**Tax Total** field value in the Summary section of the transaction record
	GST/HST	record.taxtotal	(For Canadian subsidiaries only) **GST/HST** field value in the Summary section of the transaction record
	PST	record.tax2total	(For Canadian subsidiaries only) **PST** field value in the Summary section of the transaction record

Section	Field Name	Field ID	Description
	Shipping Total	record.altshippingcost + record.althandlingcost	Calculated sum of **Shipping Cost** and **Handling Cost** field values in the Summary section of the transaction record
	Gift Certificate	record.giftcertapplied	**Gift Certificate** field value in the Summary section on the transaction record
	Grand Total Quantity	-	Calculated sum of all item quantities on the transaction record
	Grand Total Amount	record.total	**Total** field value in the Summary section of the transaction record **Important:** The grand total amount may be different from the aggregate sum of amounts on the transaction, especially in cases where you use line item discounts and custom price levels.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for invoice, see the help topic Standard Invoice PDF/HTML Template.

Picking Ticket Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Picking Ticket
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record
	Date	record.trandate	**Date** field value on the related Sales Order or Transfer Order record
	Order #	record.tranid	**Transaction ID** field value on the related Sales Order or Transfer Order record
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record
Shipping Information	Ship To:	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record When the **Multiple Shipping Routes** feature is enabled, the **Enable Item Line Shipping** box is shown on the **Item** subtab of the sales order.

Section	Field Name	Field ID	Description
			This feature allows you to add different shipping addresses for each item in the Item sublist. If there are multiple shipping addresses available in the transaction, the **Ship To** field in the printout becomes hidden.
Grid Table	Grid Table Name	Any of the following: ■ item.custcol_gridoe_ hidden_parentdispname (parent item's display name) ■ item.custcol_gridoe_ hidden_parentname (parent item's item name)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. Items using grid item templates are shown on the item list.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.
	Row Attribute Values	gridData.grid.data[i]. rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[i].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute This value is derived from the **Quantity** column of the related Sales Order or Transfer Order record.
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the related Sales Order or Transfer Order record
	Name	Any of the following: ■ item.custcol_gridoe_ hidden_displayname (item's display name) ■ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for picking ticket, see the help topic Standard Picking Ticket PDF/HTML Template.

Packing Slip Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Packing Slip
	Company Name	companyinformation. companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record
	Date	salesorder.trandate	**Date** field value on the related Sales Order or Transfer Order record
	Order #	salesorder.tranid	**Order #** field value on the related Sales Order or Transfer Order record
	Ship Date	salesorder.shipdate	**Ship Date** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record
	Tracking #	salesorder.linkedtrackingnumbe rs	**Tracking #** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record This field contains the **Package Tracking Number** field value on the **Packages** subtab of the Item Fulfillment record. For more information, see the help topic Tracking Numbers.
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the Item Fulfillment record
Shipping Information	Address	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the Item Fulfillment record
Grid Table	Grid Table Name	Any of the following: ▪ item.custcol_gridoe_hidden_parentdispname (parent item's display name) ▪ item.custcol_gridoe_hidden_parentname (parent item's item name)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/ Number** field value becomes the grid table name. Items using grid item templates are shown on the item list.
	Ordered	-	Calculated sum of ordered quantities for each row attribute This value is derived from the **Quantity** column of the related Sales Order or Transfer Order record.
	Total Ordered	-	Calculated total ordered quantity This value is located at the bottom of the **Ordered** column on the grid table.

Section	Field Name	Field ID	Description
	Row Attribute Values	gridData.grid.data[i].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[i].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Fulfilled item quantity for each column attribute This value is derived from the **Quantity** column of the Item Fulfillment record.
	Column Attributes Total Item Quantity	-	Calculated total of fulfilled item quantities for each column attribute This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Back Ordered	-	Calculated sum of back-ordered quantities for each row attribute This value is derived from the **Back Ordered** column of the related Sales Order or Transfer Order record.
	Total Back Ordered	-	Calculated total back-ordered quantity This value is located at the bottom of the **Back Ordered** column on the grid table.
	Shipped	-	Calculated sum of quantities for each item on the Item Fulfillment record
	Total Shipped	-	Calculated total shipped quantity This value is located at the bottom of the **Shipped** column on the grid table.
Item List	Ordered	salesorder.item.quantity	Calculated sum of ordered quantities for each item on the item list This value is derived from the **Quantity** column of the related Sales Order or Transfer Order record.
	Total Ordered	-	Calculated total ordered quantity This value is located at the bottom of the **Ordered** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ■ item.custcol_gridoe_hidden_displayname (item's display name) ■ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
	Back Ordered	-	Calculated sum of back-ordered quantities for each row attribute

Section	Field Name	Field ID	Description
			This value is derived from the **Back Ordered** column of the related Sales Order or Transfer Order record.
	Total Back Ordered	-	Calculated total back-ordered quantity This value is located at the bottom of the **Back Ordered** column on the item list.
	Shipped	item.quantity	Quantity of each item on the Item Fulfillment record
	Total Shipped	-	Calculated total shipped quantity This value is located at the bottom of the **Shipped** column on the item list.
Customer Return Form	Company Name	companyinformation. companyname	Company name on the Company Information record
	Return Address	companyInformation. returnaddress_text	Return address on the Company Information record
	Order #	salesorder.tranid	**Order #** field value on the related Sales Order or Transfer Order record
	R.A.#	-	Blank field where you can input the return authorization number
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for packing slip, see the help topic Standard Packing Slip PDF/HTML Template.

Identifying the Grid Print Template Elements

This section identifies the elements included in the grid print templates. Refer to the following tables to help you create custom grid print templates.

FreeMarker Objects in the Grid Print Templates

This table lists the FreeMarker objects used in the source code of the grid print templates. These records appear only when you print transactions using grid printing.

FreeMarker Objects	Description
parameters	Contains the following values based on the number format you select on your user preferences: ▪ **grouping** – thousand separator ▪ **decimal** – decimal separator ▪ **negative** – negative number symbol
currencyRec	Currency record used in the transaction
{FTLUtil}	Contains codes from WD_GridOE_TemplateUtils.xml located in SuiteBundles > Bundle 41296 > src > GridPrinting on the File Cabinet.

FreeMarker Objects	Description
{cssContent}	Contains codes from the following CSS files in the File Cabinet: ■ **For purchase order and sales order** – wd_gom_template_style.css located in SuiteBundles > Bundle 41296 > src > css. ■ **For cash sale and quote** – WD_GridOE_GridPrintOut.css located in SuiteBundles > Bundle 41296 > src > GridPrinting.

Custom Fields in the Transaction Record

This table lists the custom fields in the transaction record that references information from the item record.

Field Name	Field ID	Description
Parent Name	custcol_gridoe_hidden_parentname	Item's **Subitem Of** field value
Parent Display Name	custcol_gridoe_hidden_parentdispname	Parent item's **Display Name/Code** field value
Display Name	custcol_gridoe_hidden_displayname	Item's **Display Name/Code** field value

FreeMarker Functions in the Template Utility

This table lists the FreeMarker functions used in the **WD_GridOE_TemplateUtils.xml** template utility file. This file is located in the SuiteBundles > Bundle 41296 > src > GridPrinting folder on the File Cabinet.

Before using other functions, you must first call `getItemDetails` or `getItemOrderedShippedQty` functions. Other functions in the utility file depend on the item details in the JSON data.

You can find the following FreeMarker functions in the utility file when you create custom grid print templates.

FreeMarker Function	Parameters	Description	Sample
min(val1, val2)	**val1, val2** – compares numeric values	This function returns the lower value between parameters val1 and val2.	**FTL:** <#assign test = min(1,9)> {test} **Output:** 1
getItemDetails(items)	**items** – accepts record.item, which is the current transaction's item list	This function traverses through the item lines in the transaction. Then this function returns a JSON data with the following pattern: {<item.itemid>: {rate: <item.rate>,quantity: <item.quantity>}} The JSON data stores the same items with collated quantities. If the item rates differ, the JSON data stores the rate of the item's latest entry.	**record.item:** -[{itemid: 10, rate: 10, quantity: 10}, {itemid: 20, rate: 20, quantity: 20}. {itemid: 10, rate: 30, quantity: 30}] **FTL:** {getItemDetails(record.item)} **Output:** {10: {rate: 30, quantity: 40} 20: {rate: 20, quantity: 20}}
getItemOrderedShippedQty(salesorder, items)	**salesorder** – corresponding sales order or transfer order transaction record of the current item fulfillment	You can use this function in packing slips.	**salesorder.item:**

FreeMarker Function	Parameters	Description	Sample

	items – accepts record.item, which is the current transaction's item list	This function traverses through the item lines in the current sales order or transfer order related to the item fulfillment. Then, this function returns a JSON data with the following pattern:
		`{itemid: {ordered: <SO.quantity>, shipped: <IF.quantity>, backorder: <SO.backordered>}}`
		The JSON data stores only the items found in both item fulfillment and sales order or transfer order transactions. The JSON data also stores the same items with collated quantities, shipped quantities, and backordered quantities.
			`-[{itemid: 10, rate: 10, quantity: 10, backordered: 10},`
			`{itemid: 20, rate: 20, quantity: 20, backordered: 0}.`
			`{itemid: 10, rate: 30, quantity: 30, backordered: 0}]`
			record.item: (IF)
			`-[{itemid: 10, quantity: 5}]`
			FTL:
			`{getItemOrderedShippedQty( salesorder, record.item)}`
			Output:
			`{10: {ordered: 40, shipped: 5, backorder: 10}}`

getRowColLabel(gridData)	**gridData** – grid data from record.custbody_gridoe_ trantemplatedata	When the gridData.type is "MI", the output returns the label stored in gridData.grid.rowcollabel.
		When the gridData.type is not "MI", the output returns "gridData.grid.rowlabel / gridData.grid.collabel".
			gridData[0]:
			`{type: "MI", grid: {rowcollabel: "Main Label", rowlabel: "Color", collabel: "Size"}}`
			gridData[1]:
			`{type: "NA", grid: {rowcollabel: "Main Label", rowlabel: "Color", collabel: "Size"}}`
			FTL:
			`{getRowColLabel{gridData[0]}}`
			`{getRowColLabel{gridData[1]}}`
			Output:
			"Main Label"
			"Color / Size"

getRowColumnData(row, col, subcolumn)	**row** – accepts gridData.grid.data element
	col – accepts gridData.grid. data.columnids element
	subcolumn – accepts subcolumns (Rate, Qty)
		The loop for gridData.grid.data that traverses the rows and columns must call this function.
		This function gets the corresponding subcolumn data for the current row and column of the loop from itemDetails.
		When subcolumn is **picked**, the output returns blank. When subcolumn is **rate**, the output formats to currency 0.00.
			itemDetails:
			`{10: {rate: 100, quantity: 999}}`
			FTL:
			`{getRowColumnData(row,col, rate)}`
			`{getRowColumnData(row,col, quantity)}`
			`{getRowColumnData(row,col, picked)}`
			Output:
			100.00
			999
			""

getRowTotal(row, subcolumn)	**row** – accepts gridData.grid.data element
	subcolumn – accepts subcolumns (Rate, Qty)
		The loop for gridData.grid.data that traverses the rows and columns must call this function.	**gridData.grid.data:**
			`{column01:{ internalid: 10},`
			`column02: { internalid: 20}}`

FreeMarker Function	Parameters	Description	Sample

		This function gets the corresponding subcolumn total for the current row of the loop from itemDetails.	**itemDetails:**
			`{10: {rate: 100, quantity: 999},`
			`20: {rate: 100, quantity: 1}}`
			FTL:
			`{getRowTotal(row, rate)}`
			`{getRowTotal(row, quantity)}`
			Output:
			200
			1000

getColumnTotal (rows, column, subcolumn)	**row** – accepts gridData.grid.data
	column – accepts gridData. grid.data.columnids element
	subcolumn – accepts subcolumn (Rate, Qty)
		The loop for gridData.grid.data.columnids that traverses the rows and columns must call this function.
		This function gets the corresponding subcolumn total for the current column of the loop from itemDetails.
			gridData[0].grid.data::
			`{column01:{ internalid: 10}}`
			gridData[1].grid.data:
			`{column01:{ internalid: 20}}`
			itemDetails:
			`{10: {rate: 100, quantity: 999},`
			`20: {rate: 100, quantity: 1}}`
			FTL:
			`{getColumnTotal(rows, col, rate)}`
			`{getColumnTotal(rows, col, quantity)}`
			Output:
			200
			1000

JSON Codes for the Grid Table

This section provides the JSON codes that contain the data for the grid table in the grid print templates. You can use this information to identify the grid table elements for each transaction.

Before using these JSON codes, consider the following tips in customizing the grid table in the template:

- Item details come from the item sublist in the transaction record. To display the item details, you must use the record.item field. The fields `record.custbody_gridoe_productgrpdata` and `record.custbody_gridoe_trantemplatedata` do not contain item details.
- You may overwrite the CSS file by updating the `{cssContent}` inside the style tag.
- To change the maximum number of column attributes for each table, update the value in the `<#assign maxcol = 6>` line.

Grid Table for Standard Grid Order Printing

The grid print templates for purchase order and sales order transactions contain the `record.custbody_gridoe_productgrpdata` field. This field contains the data for the grid table. Refer to the following information to learn more about this field.

JSON Code Snippet for Standard Grid Order Printing

The following JSON code snippet shows a sample 2x2 grid table from `record.custbody_gridoe_productgrpdata`:

```
[
  {
    "type": "MI",
    "nameId": "2369",
    "name": "Basic Crew Neck T-shirt",
    "category": "Color, Size",
    "rowattr": "custitem2",
    "colattr": "custitem1",
    "grid": {
      "rowlabel": "Color",
      "collabel": "Size",
      "rowcollabel": "Matrix Item Option",
      "header": [
        {
          "id": "Column1",
          "colAttr": "1",
          "name": "Small",
          "percentage": "0.0"
        },
        {
          "id": "Column2",
          "colAttr": "2",
          "name": "Medium",
          "percentage": "0.0"
        }
      ],
      "data": [
        {
          "id": "Row1",
          "rowattributeid": "1",
          "rowattribute": "Red",
          "rowpercents": 0,
          "columnids": [
            "Column1",
            "Column2"
          ],
          "columnpercents": [
            0,
            0
          ],
          "Column1": {
            "internalid": 4220,
            "defaultpercent": 25
          },
          "Column2": {
            "internalid": 4222,
            "defaultpercent": 25
          }
        },
        {
          "id": "Row2",
          "rowattributeid": "2",
          "rowattribute": "Blue",
          "rowpercents": 0,
          "columnids": [
            "Column1",
            "Column2"
          ],
          "columnpercents": [
            0,
            0
          ],
          "Column1": {
            "internalid": 4221,
            "defaultpercent": 25
          },
          "Column2": {
            "internalid": 4223,
            "defaultpercent": 25
          }
        }
      ]
    }
```

```
  }
]
```

Sample 2x2 Grid Table Representation for Standard Grid Order Printing

For grid tables in standard grid order printing, consider the following details:

- The index of the grid in `record.custbody_gridoe_productgrpdata` is the same as the item's grid ID column in item sublist.
- The template may contain an empty `record.custbody_gridoe_productgrpdata` field.
- The template may contain an empty `{}` entry member in `record.custbody_gridoe_productgrpdata`. If the entry member is empty, it means that the whole template and its items are deleted in item sublist.

The following table represents the sample JSON code into a 2x2 grid table in purchase order and sales order printouts.

Matrix Item Option (record.custbody_gridoe_productgrpdata[0].grid.rowcollabel)	**Small** (record.custbody_gridoe_productgrpdata[0].grid.header[0].name)	**Medium** (record.custbody_gridoe_productgrpdata[0].grid.header[1].name)
Blue (record.custbody_gridoe_productgrpdata[0].grid.data[0].rowattribute)	**Row 1 Col 1 Item ID:** (record.custbody_gridoe_productgrpdata[0].grid.data[0].Column1)	**Row 1 Col 2 Item ID:** (record.custbody_gridoe_productgrpdata[0].grid.data[0].Column2)
Red (record.custbody_gridoe_productgrpdata[0].grid.data[1].rowattribute)	**Row 2 Col 1 Item ID:** (record.custbody_gridoe_productgrpdata[0].grid.data[1].Column1)	**Row 2 Col 2 Item ID:** (record.custbody_gridoe_productgrpdata[0].grid.data[1].Column2)

Grid Table for Grid Print Templates

The grid print templates for cash sale, invoice, picking ticket, packing slip and quote transactions contain the `record.custbody_gridoe_trantemplatedata` field. This field contains the data for the grid table. Refer to the following information to learn more about this field.

JSON Code Snippet for Grid Print Templates

The following JSON code snippet shows a sample 2x2 grid table from `record.custbody_gridoe_trantemplatedata`:

```
{1:
  {
    "type": "MI",
    "nameId": "4",
    "name": "Basic Crew Neck Tee"
    "grid": {
      "rowlabel": "Color",
      "collabel": "Size",
      "rowcollabel": "Matrix Item Options",
      "header": [
        {
          "id": "Column1",
          "colAttr": "1",
          "name": "Small"
        },
        {
          "id": "Column2",
          "colAttr": "2",
```

```
          "name": "Medium"
        }
      ],
      "data": [
        {
          "id": "Row1",
          "rowattributeid": "1",
          "rowattribute": "blue"
          "columnids": [
            "Column1",
            "Column2"
          ],
          "Column1": {"internalid": 6316},
          "Column2": {"internalid": 6318},
        },
        {
          "id": "Row2",
          "rowattributeid": "2",
          "rowattribute": "red",
          "columnids": [
            "Column1",
            "Column2"
          ],
          "Column1": {"internalid": 6317},
          "Column2": {"internalid": 6319}
        }
      ]
    }
  }
}
```

Sample 2x2 Grid Table Representation for Grid Print Templates

For grid tables in grid print templates, note that the template may contain an empty `record.custbody_gridoe_trantemplatedata` field.

The following table represents the sample JSON code into a 2x2 grid table in cash sale, invoice, packing slip, picking ticket, and quote printouts.

Matrix Item Option `(record.custbody_gridoe_trantemplatedata[0].grid.rowcollabel)`	**Small** `(record.custbody_gridoe_trantemplatedata[0].grid.header[0].name)`	**Medium** `(record.custbody_gridoe_trantemplatedata[0].grid.header[1].name)`
Blue `(record.custbody_gridoe_trantemplatedata[0].grid.data[0].rowattribute)`	**Row 1 Col 1 Item ID:** `(record.custbody_gridoe_trantemplatedata[0].grid.data[0].Column1)`	**Row 1 Col 2 Item ID:** `(record.custbody_gridoe_trantemplatedata[0].grid.data[0].Column2)`
Red `(record.custbody_gridoe_trantemplatedata[0].grid.data[1].rowattribute)`	**Row 2 Col 1 Item ID:** `(record.custbody_gridoe_trantemplatedata[0].grid.data[1].Column1)`	**Row 2 Col 2 Item ID:** `(record.custbody_gridoe_trantemplatedata[0].grid.data[1].Column2)`

Customizing the Printout using Advanced PDF/HTML Templates

You can use advanced PDF/HTML templates to customize the printouts for grid printing. Advanced PDF/HTML templates can access the same FreeMarker codes in the `record.custbody_gridoe_productgrpdata` and `record.custbody_gridoe_trantemplatedata` fields. However, not all references used in custom grid print templates are accessible in Advanced PDF/HTML templates.

You must have sufficient CSS and HTML knowledge to update advanced PDF/HTML templates. For more information, see the help topic Source Code Editing in the Template Editor.

To see the list of fields and sublists available in advanced PDF/HTML templates, see the help topic SuiteBuilder Advanced Templates Reference.

Follow these instructions to customize advanced PDF/HTML templates for grid print templates.

To customize the printout using advanced PDF/HTML templates:

1. Go to Customization > Forms > Advanced PDF/HTML Templates.
2. On the Advanced PDF/HTML Templates list, click the Customize or Edit link for the advanced print template that you want to update.
3. On the Advanced PDF/HTML Template page, click **Source Code** to transfer to this mode.
4. Insert the following codes:
    a. Insert `{cssContent}` within the `<style> </style>` tags. This record is used for formatting the grid.
    b. Insert `{FTLUtil}` before the `<head> </head>` tags. This record contains FreeMarker functions to manipulate the grid data.
5. Click **Save**.
6. If you want to view the changes before saving, click **Preview**.
7. Copy the contents of the template and paste into a new XML file.
8. Upload the XML file in the Grid Printing Templates folder in the File Cabinet. See Uploading Custom Grid Print Templates.

You can also setup the advanced PDF/HTML template in custom forms. For more information, see the help topic Setting Custom Forms to Use Advanced Templates

For more information about advanced templates, see the help topic Advanced PDF/HTML Templates.

Uploading Custom Grid Print Templates

Follow these instructions to upload your customized grid print templates in the NetSuite File Cabinet.

To upload your customized grid print templates:

1. Go to Documents > Files > File Cabinet.
2. On the File Cabinet page, go to the Templates > Grid Printing Templates folder.
3. Click **Add File**.
4. On the File Upload popup window, select your custom XML file, and then click **Open** to add the file to the folder.

After saving custom grid print templates in the File Cabinet, the templates become available in the dropdown list on the **Grid Print** subtab of the Grid Preferences page. To assign grid print templates to transactions, see Setting Grid Order Management Preferences.