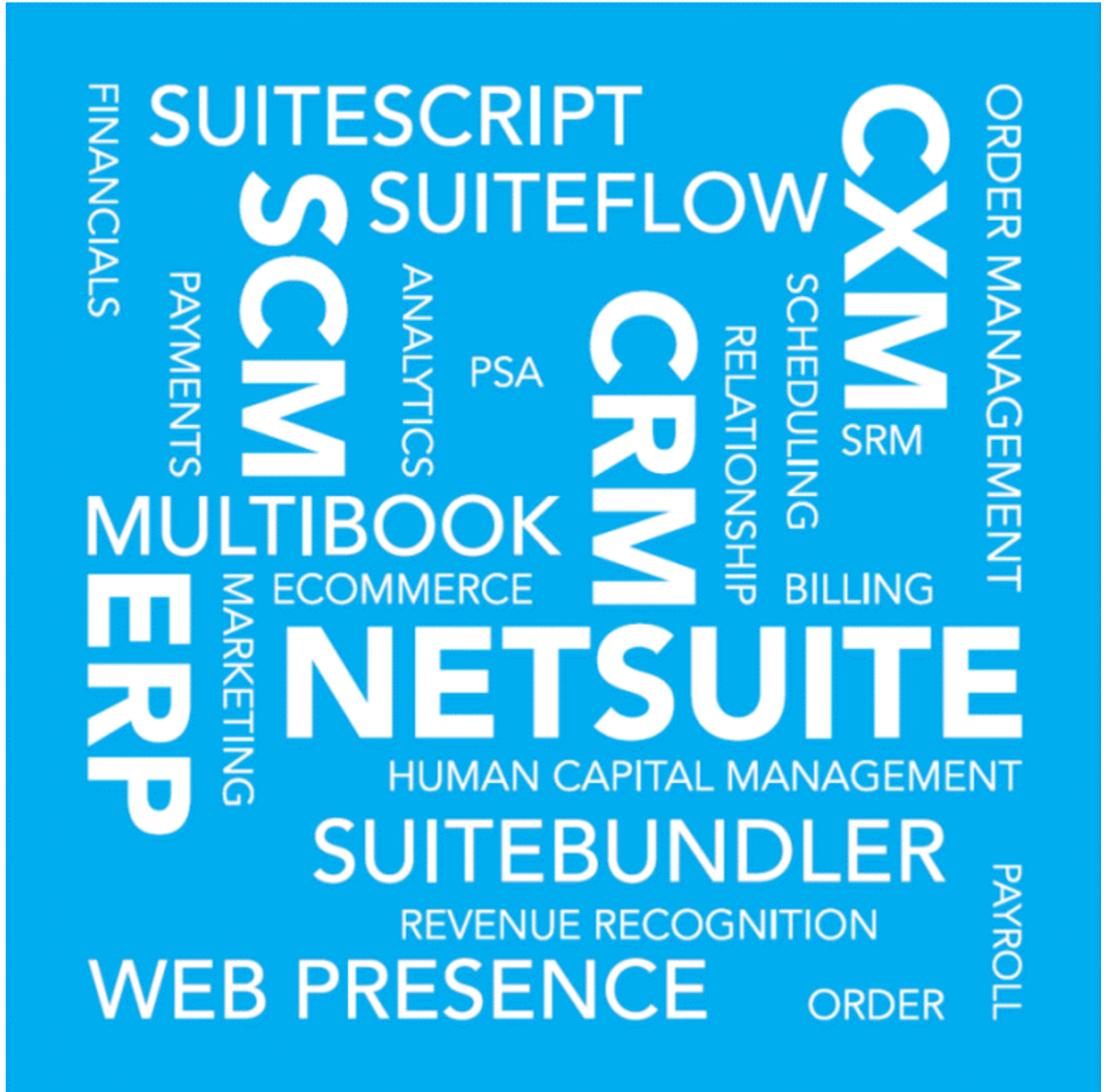


# Grid Order Management



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# Grid Order Management

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## Grid Order Management Overview

The Grid Order Management SuiteApp provides the ability to use a grid format for entering and printing orders for inventory items or assembly items, with attributes such as color and size. The Grid Order Management SuiteApp also provides the ability to create custom grid print templates and assign them to transactions.

Use grid templates when creating your order transaction. As you create a grid order, you can view item information such as the item name, location, available quantity, and price. This streamlined grid format can save order entry time, increase the accuracy of orders for like items, and give users the opportunity to sell or fulfill orders faster.

Grid order entry is available for sales orders, purchase orders, transfer orders, and quotes.

Standard grid order printing is available for sales orders and purchase orders.

For transactions where grid entry or standard grid printing is not available, you can set up grid print templates to enable you to print items in grid format.

Grid print templates can be used for sales orders, purchase orders, quotes, cash sales, invoices, picking tickets, and packing slips.

Bulk grid printing is available for transfer orders, quotes, cash sales, invoices, picking tickets, and packing slips.

See the following table of features available for each transaction or form:

Transactions	Available Features			
	Grid order entry	Standard grid order printing	Printing using grid print templates	Bulk grid printing
Sales order	Y (1)	Y	Y	N
Purchase order	Y	Y	Y	N
Transfer order	Y	N	N	Y
Inventory adjustment	Y	N	N	N
Quote	Y	N	Y	Y
Cash sale	N	N	Y	Y
Invoice	N	N	Y	Y
Picking ticket	N	N	Y	Y
Packing slip	N	N	Y (2)	Y (2)
(1) Multi-grid order entry is available for sales orders only. (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 a video introduction to Grid Order Entry, see [Grid Order Entry for Sales Orders](#) and [Grid Purchase Order](#). For more information about the grid printing options, see [Grid Printing](#).

**Note:** For better performance of Grid Order Management, use Mozilla Firefox or Google Chrome.

## Grid Order Management SuiteApp Availability

To purchase the Grid Order Management SuiteApp, contact your NetSuite account manager.

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)

**Note:** Matrix items for Non-Inventory, Other Charge, and Service items are not supported.

- 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. Therefore, it cannot be changed. For more information, see the help topic [Multiple Currencies and Vendors](#).
- After installing Grid Order Management, you can use grid print templates to print new transactions and forms. For existing transactions, you must edit and save the record to display the Print Grid option. 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 for sales orders only.
- The Grid Order Entry form does not display on a mobile device.
- Only the use of the % wildcard character is supported to search for locations on the **Grid Matrix Information** subtab of parent matrix item records and for templates on the Grid Order Entry form of transactions. 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**

Other limitations and considerations are included in the following topics:

- [Setting Up Grid Templates](#)
- [Applying Grid Attributes to Items](#)
- [Creating Grid Orders](#)
- [Grid Printing](#)
- [Bulk Grid Printing](#)
- [Viewing Matrix Items in Grid Format](#)

## Setup Requirements for Grid Order Management

See the following topics for information on how to setup the Grid Order Management SuiteApp:

- [Installing the Grid Order Management SuiteApp](#)
- [Roles and Permissions for Grid Order Management](#)

## Checking Prerequisites for Grid Order Management

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



**Note:** 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 entered in 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 [Creating 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, check the **Multi-Location Inventory** box on the **Items & Inventory** subtab.
- Features for grid inventory adjustments
  - On the **Transactions** subtab, check the **Inventory Adjustment** box.
  - For OneWorld accounts, check the **Multi-Location Inventory** box on the **Items & Inventory** subtab.
- 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



**Important:** The Grid Order Management SuiteApp is a shared bundle. To install the SuiteApp, your NetSuite account must be listed as a Shared Account ID for the bundle. Only administrators can install this SuiteApp. To purchase the SuiteApp, contact your NetSuite sales representative.

To review the required features and preferences before you install the SuiteApp, see [Checking 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. Optionally, click the Grid Order Management name link to display its Bundle Details page.
  - To review documentation for the SuiteApp, click the Documentation link.
  - 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, see the following topics:

- [Roles and Permissions for Grid Order Management](#)
- [Setting Grid Order Management Preferences](#)



**Note:** Grid Order Management is a managed SuiteApp. When a new version of this SuiteApp becomes available, it is automatically updated in accounts where it is installed.

## 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 grid 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 already configured 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
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

You can use the Mass Update feature to add, remove, or change the level of permission for multiple roles at the same time, instead of editing roles individually. 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	Maximum Permission Level
Apply Attribute	Custom Record	Edit	Full
GOE - Grid Item	Custom Record	Edit	Full
GOE - Grid Item Template	Custom Record	Edit	Full
GOE - Grid Matrix	Custom Record	Edit	Full
GOE - Grid Matrix Template	Custom Record	Edit	Full
GOE - Grid Order Item	Custom Record	Edit	Full
GOE - Grid Order Template	Custom Record	Edit	Full
GOE - Grid Template	Custom Record	Edit	Full
GOE - Preferences	Custom Record	Edit	Full
Grid Attribute	Custom Record	Edit	Full
Grid Attribute - Value	Custom Record	Edit	Full
Custom Record Types	Setup	Edit	Full
Custom Item Fields	Setup	Edit	Full
Custom Record Entries	Lists	Edit	Full

The following table lists the specific record permissions required to use grid order printing:

Permission	Subtab	Minimum Permission Level
Subsidiaries (applicable to OneWorld accounts)	Lists	View
GOE - Grid Order Template	Custom Record	View
GOE - Grid Order Item	Custom Record	View

To use grid print templates, the role must have access to the 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

In Grid Order Management, you can set preferences for the Grid Order Entry form and Grid Printing feature. The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might 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 enables 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** tab, 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 value is 2 and the maximum value that can be specified is 5 decimal places.

- **Percentage Tolerance** – Enter the tolerance value that is used when the total percentage is not equal to 100%. You must enter the value in decimal form. The value you entered 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%. You cannot submit the grid order because it exceeds the specified percentage tolerance.



**Note:** 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 selected 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 in 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 enables 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. In the **Grid Printing** tab, 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.



**Tip:** To send notifications to multiple recipients, enter a group email address.

3. Select a grid print template for each transaction or form. You can select a default 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 default grid templates provided by the Grid Order Management SuiteApp are selected as preferences for the following transactions and forms:

- **Quote** – wd\_gom\_template\_qtgridprintout.xml
- **Cash sale** – wd\_gom\_template\_csgridprintout.xml
- **Invoice** – wd\_gom\_template\_ivgridprintout.xml
- **Picking Ticket** – wd\_gom\_template\_ptgridprintout.xml
- **Packing Slip** – wd\_gom\_template\_psgridprintout.xml
- **Purchase Order** – wd\_gom\_template\_pogridprintout.xml
- **Sales Order** – wd\_gom\_template\_sogridprintout.xml

4. Click **Save**.

You can use advanced print templates that have been customized for grid printing. For more information about customizing print templates, see [Customizing Advanced Print Templates for Grid Printing](#).

For customizing the grid for printing purchase orders and sales orders, see [Customizing the Grid for Printing Purchase Orders and Sales Orders](#).

Custom templates must be uploaded to a specific File Cabinet folder. For more information, see [Customizing the Grid for Printing Purchase Orders and Sales Orders](#). When you delete a template used for grid printing, you must edit your Grid Printing preferences.

## Setting Up Grid Templates

You can set up a grid matrix or grid item template depending on the item type. Use grid matrix templates for inventory and assembly matrix items. Use grid item templates for inventory and assembly items, both lot numbered and serialized types. See the following topics for more information about each of these templates:

- [Setting Up Grid Matrix Templates](#)
- [Setting Up Grid Item Templates](#)

Note the following when setting up grid templates:

- Grid Order Management can optimally handle up to 1000 matrix templates and 1000 item templates.



**Important:** 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 product of 200 values as grid attributes. To identify 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 a product of 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 product 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 update an item record to add more attributes or values to a parent matrix item. For more information, see the help topic [Editing Matrix Items](#).
- You cannot create grid matrix templates for matrix parent items with no subitems.
- Creating and updating grid matrix and item templates on orders using CSV import and Web services are not supported.
- To maintain accuracy, avoid updating the name of used grid templates because the template name on associated transactions are not updated automatically. However, the new grid line items that you add to associated transactions use the updated name. This behavior results in transactions where line items use the same template but display either the previous or updated name. Names that are displayed 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 on the template, the row and column attribute fields 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.

You can create grid matrix templates in bulk or one at a time. For instructions, see the following topics:

- [Creating a Single Grid Matrix Template](#)
- [Creating Grid Matrix Templates in Bulk](#)
- [Creating a Copy of the Grid Matrix Template](#)

You can view the list of grid matrix templates in Lists > Grid Order Entry > Grid Templates. To edit a template, click the Edit link for the template record. You can modify the settings and percentages assigned to the attribute values. If you update a template, existing orders that use the template are not updated automatically. For more information, see [Editing Grid Orders](#).



**Important:** You cannot inactivate a parent matrix item or delete a matrix item that is assigned to a grid matrix template. Additionally, you cannot delete a grid matrix template that is used on an order transaction.



**Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. Users with the Sales Person role cannot delete grid matrix templates. For more information, see [Roles and Permissions for Grid Order Management](#).

## Creating a Single Grid Matrix Template

Use the following procedure to create a grid matrix template. To create multiple grid matrix templates in bulk, see [Creating Grid Matrix Templates in Bulk](#).

### To create a single Grid Matrix Template:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Template page, click **New Grid Matrix Template**.



**Note:** If the **Matrix Items** feature is not enabled in your account, the **New Grid Matrix Template** button is not displayed. For more information, see [Checking Prerequisites for Grid Order Management](#).

3. On the Grid Matrix Template page, enter values in the fields in the Matrix Item Definition section:
  1. In the **Matrix Item** field, select the item matrix you want to configure.  
When an item matrix is selected, the system populates the **Category** field with the item's properties, and 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 column attribute and the other properties as row attributes.
  2. (Optional) In the **Description** field, provide a description for the template up to 300 characters.
  3. In the **Column Attribute** field, select the property you want as column attribute.  
When you change the column attribute, the attribute you replaced is automatically assigned in the **Row Attribute** field.

4. In the Grid Template section, 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.

**Note:** 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.

ROW PERCENTAGE		COLUMN PERCENTAGE		
100.00		100.00		
COLOR - SIZE		SMALL 25.00	MEDIUM 50.00	LARGE 25.00
COLOR	PERCENT			
Ocean	20.00	Skinny Jeans -O-S	Skinny Jeans -O-M	Skinny Jeans -O-L
Midnight	50.00	Skinny Jeans -M-S	Skinny Jeans -M-M	Skinny Jeans -M-L
Honey	30.00	Skinny Jeans -H-S	Skinny Jeans -H-M	Skinny Jeans -H-L

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. Click **Save**.

Clicking **New** clears the current template settings and displays a new blank template.

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

- [Entering Single Grid Orders](#)
- [Entering Multi-Grid Orders](#)

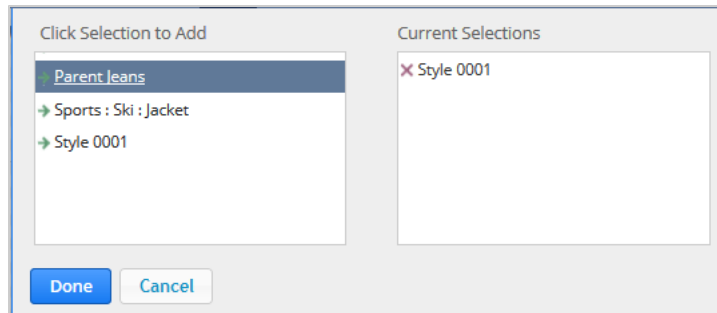
## Creating Grid Matrix Templates in Bulk

Grid matrix templates created in bulk can be automatically used in all supported transactions. You can edit a template to update its availability. In the **Available In** field of the template record, select the transactions where you want the template to be used. For more information, see [Creating a Single Grid Matrix Template](#).

### To create grid matrix templates in bulk:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Templates list, click **Bulk Create Grid Matrix Templates**.
3. On the Bulk Create Grid Matrix Templates page, click the Select Multiple icon located beside the Parent Matrix Items list box
4. On the pop up list, click an item name from the left pane to select it.

Selected items are transferred to the right pane. On the right pane, click the **x** icon beside the item name to remove it from the Current Selections list.



5. Click **Done** to close the popup window.
6. In the **Column Attribute** field, select the attribute that you want to display as column header in the grid matrix template.  
After you select the column attribute, the other attributes become row attributes in the grid template.
7. Click **Submit** to start the process and open the Grid Template Creation Log: Results page.  
The bulk creation of grid matrix templates may take some time to process. On the Grid Template Creation Log: Results page, you can monitor the processing status:
  - In the **Status** column, view the latest processing status.
  - In the **Error Details** column, view the total number of generated templates.

**Note:** If not all templates have been generated successfully, view the matrix items without grid templates in the **Failed Items** column.  
The system does not generate templates for parent matrix items that do not have the selected column attribute.

## 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 details are copied, except for the template name. You can edit some details of the copy before saving the template.

### To create a copy of a grid matrix template:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Templates list, click the View link for the grid template to be copied.
3. On the Grid Matrix Template page, click **Make Copy**.  
This button is available only in view mode.
4. On the template copy, enter a name for the grid matrix template.  
You can update the description, selected transactions, and item percentages. For more information about the editable fields, see [Creating a Single Grid Matrix Template](#).
5. Click **Save**.

## Setting Up Grid Item Templates

To enter orders for multiple inventory and assembly items in the grid order, you must first configure items in a grid item template. Like grid matrix templates, grid item templates determine the categories



and quantity distribution that are shown in the grid for an item. To create grid item templates, the following procedures must be completed:

1. [Defining Grid Attributes and Creating Attribute Values](#)
2. [Applying Grid Attributes to Items](#)
3. [Creating a Grid Item Template](#)

To review specific guidelines and limitations, see [Setting Up Grid Templates](#). For limitations related to Grid Order Management in general, see [Limitations of Grid Order Management](#).

## Defining Grid Attributes and Creating Attribute Values

Grid attributes define product categories or the dimensions of items. For example, a company that sells apparel can set up items by creating attributes common to them like size, color, style, and cut. Values are created for each attribute to represent the range of options available (for example, small and medium for size). Finally, items are mapped to its attributes.

To help create well-defined grid item templates, create attributes for the hierarchical structure of categories, properties, characteristics, and dimensions of your items. Duplicate grid attributes are not allowed.

**Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see [Roles and Permissions for Grid Order Management](#).

### To define a grid attribute and create its values:

1. Go to Lists > Grid Order Entry > Define Grid Attribute > New.  
Alternately, click **New Grid Attribute** if you are on the Grid Attribute List page.
2. On the Grid Attribute page, enter a name for the attribute.

3. Click **Save**.  
The new grid attribute record is created and displayed. If you click **Save & New**, the system displays a new blank Grid Attribute page.  
The succeeding instructions show you how to add attribute values to the new grid attribute.
4. On the Grid Attribute page, click **New Grid Attribute - Value**.
5. On the Grid Attribute - Value page, enter a name for the attribute value.

6. Click **Save**.

The new attribute value is added to the list on the Grid Attribute page.

Alternately, click **Save & New** if you need to save and define another attribute.



**Important:** You can use Import Assistant to create and update grid attributes. The **Run Server SuiteScript and Trigger Workflows** option (Setup > Import/Export > CSV Import Preferences) must be enabled to correctly set the name of the values during record creation. For more information, see the help topic [Importing CSV Files with the Import Assistant](#).

## Editing grid attribute records

New grid attribute records are added to the Grid Attribute List. To view the list, go to Lists > Grid Order Entry > Define Grid Attribute. On the Grid Attribute List, you can edit a grid attribute if it is not mapped to items that have been used in a grid template.

### To edit a grid attribute record:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click the Edit link for the grid attribute you want to modify.  
Alternately, click **Edit** if you are already viewing the specific Grid Attribute page.
3. On the Edit Grid Attribute page, you may do any of the following:
  - In the **Name** field, change or correct the grid attribute name.
  - To delete the grid attribute record, select **Delete** from the Actions submenu.



**Note:** You cannot delete the record if the grid attribute is mapped to an item that is assigned to a grid template.

- To add an attribute value, click **New Grid Attribute - Value**.  
Alternately, you can click the name link of any attribute value in the list. On the Grid Attribute - Value page, select **New** from the Actions submenu. Duplicate grid attribute values are not allowed.
  - To delete an attribute value, click the Edit link next to the attribute value. On the Edit Grid Attribute - Value page, select **Delete** from the Actions submenu.
4. Click **Save**.

After defining grid attributes and assigning attribute values, you can map the attributes to items. 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 attributes are used 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 apply grid attributes to items. The following instructions show you how to map attributes using Apply Attribute to Item page and through the item record. The third way is to use the Import Assistant. For instructions, see the help topic [Importing CSV Files with the Import Assistant](#).

Note the following guidelines and limitations specific to mapping of grid attributes:

- You can only apply grid attributes to inventory, assembly, and child matrix items.

- When using the Apply to Attribute Item page, the setup of your items might affect how they are displayed on the Apply to Attribute popup list:
  - Item names that exceed the recommended maximum of 180 characters might be displayed incorrectly.
  - Complete item names are used, including all ancestors of an item. A sample of a complete item name is displayed in this pattern – Parent 1: Child 1: Grand Child 1. Avoid using long names with minimal variation across parent and subitems, which causes duplicate items to be displayed. For example – LongItemName1: LongItemName2: LongItemName3.

For limitations of Grid Order Management in general, see [Limitations of Grid Order Management](#).

**Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see [Roles and Permissions for Grid Order Management](#).

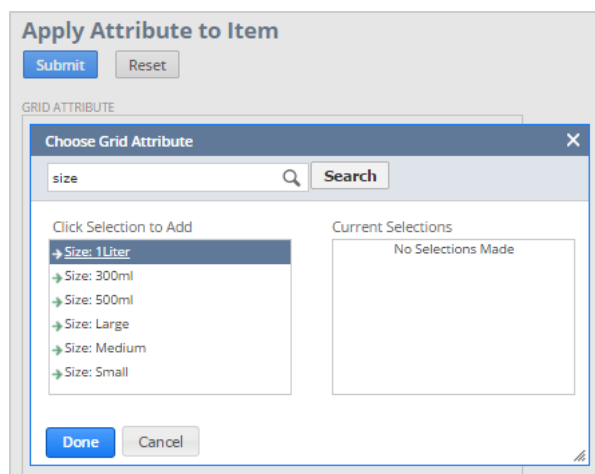
## Applying Multiple Grid Attributes to Items

### To apply multiple grid attributes to items:

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

1. Go to Lists > Grid Order Entry > Apply Attribute to Item.
2. On the Apply Attribute to Item page, click the Select Multiple icon that is located beside the **Grid Attribute** area.
3. On the Apply Attribute to Item popup list, click the grid attributes from the left pane.

If there are too many attributes on your left panel, use the **Search** field to narrow down the list. On the sample screenshot, only the attributes with the word “size” to their name are displayed on the left pane.



Grid attributes that you select are automatically displayed on the right pane. To remove a selection, click the x icon for the attribute.

4. After selecting the grid attributes, click **Done** to close the popup list.
5. For selecting the items, repeat Steps 2 – 4 in the **Items** area. On the popup list, select the items you want the attributes to be mapped to.
6. After selecting both attributes and items, click **Submit**.

Clicking **Reset** removes the selections made to clear the two areas.

The mapping of attributes to items may take some time to process, especially if you need to map multiple attributes to items. After the mapping has been completed, you can see the attributes listed in each item record.

**Note:** Mapping jobs cannot be queued. If you have access to the Script Deployment page, you can check the status of mapping in the **Status** field.

## Applying a Grid Attribute to an Item

### To apply 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.

1. Go to Lists > Accounting > Items.
2. On 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 displayed 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 displayed in a popup window. For instructions on filling out either of the forms, see [Defining Grid Attributes](#) and [Creating Attribute Values](#).

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:


- Click the Edit link for the attribute to be updated. On the Apply Attribute page, you can select another attribute or attribute-value.
- 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 submenu. If the Apply Attribute List is displayed depending on your role, you should not see the mapping from the list.

- Save your changes to the record.

## Creating a Grid Item Template


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](#).

 **Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see [Roles and Permissions for Grid Order Management](#).

### To create a Grid Item Template:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Template 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 up to 300 characters for a description of the grid item template.
  - d. In the **Select Filter** field, select the grid attributes you want to use as filters for the items

 **Important:** 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 attribute values are used to search for items that are mapped to them. The names of the attribute values are displayed in the grid as the column labels.
  - c. In the **Row Attribute** field, select the attribute you want to use as 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 attribute values are used to search for items that are mapped to them. The names of the attribute values are displayed in the grid as the row labels.

**Note:** The column and row attributes you select can be any of those selected in the **Select Filter** field. These 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 filter

**Important:** There is no limit to the number of attributes or attribute values you can select. When selecting attributes, ensure that the number of items returned does not 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 displayed in the grid in the following manner and 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 product 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 on the grid cell to view the other options, and then select the item you want.

SIZE - COLOR		BLUE 50.00	RED 50.00	WHITE 0.00
SIZE	PERCENT			
Large	0.00	-	-	-
Medium	60.00	-	Girls T-Shirt V Neck -R-M	-
Small	40.00	Girls T-Shirt V Neck -B-S	Girls T-Shirt V Neck -R-S	-

Save Cancel New

Girls T-Shirt V Neck -B-S

Girls T-Shirt V Neck -B-S

Netsuite T-Shirt -B-S

T-Shirt V Neck-B-S

8. Click **Save**.

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

### Editing grid item templates

To view the list of existing grid item templates, go to Lists > Grid Order Entry > Grid Templates. From the Grid Template list, you can update a template by clicking the **Edit** link for the specific template. On the grid item template, you can change the description, settings, and percentages. Save the updated item template.

### Deleting grid item templates

- You cannot delete a grid item template that has been used on an order transaction.
- Users with the Sales Person role cannot delete grid matrix templates. For more information, see [Roles and Permissions for Grid Order Management](#).

## Creating 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, see the following topics:

- [Entering Single Grid Orders](#)
- [Entering Multi-Grid Orders](#)

Use 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 [Setting a Location on a Transaction](#).
- 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 with no price cannot be added to the item sublist of a transaction. To review the guidelines for grid order entry, see [Creating 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 a sales order page, you can also enter values in the Sales Information section.

For instructions on creating each of the order transactions, see the following topics:


- [Creating Sales Orders](#)
- [Entering a Purchase Order](#)
- [Entering a Transfer Order](#)
- [Adjusting Inventory](#)
- [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](http://system.netsuite.com) to use the Grid Order Entry popup form.

 **Note:** The **Open Grid** button is not available to users that do not 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.

 **Note:** 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 might not be displayed 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.

 **Note:** In OneWorld accounts, only the grid templates for items that are available to the transaction subsidiary are available for selection.

- 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 displayed. 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.

 **Note:** Default order priority applies to sales orders and transfer orders only.

5. Enter values in the Order Details section.

 **Note:** 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](#).

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

The quantities are displayed 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.

- 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 display for the item.

- 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 field (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.



**Note:** 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 field (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 **Estimated 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.



**Note:** 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 on the grid are automatically recalculated when you change item quantities.



**Note:** 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 [Creating a Grid Item Template](#).

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. Ensure that you understand the following conditions when editing grid items in the sublist:
  - 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 displayed 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.
8. After completing the order, click **Save** on the order page.

## 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](#).

Review the following guidelines when entering multi-grid orders:

- You can enter multi-grid orders on sales orders only.
- 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 [Creating Grid Orders](#).

Other sections in this topic:

- [Viewing Order Summary Details](#)
- [Updating Multi-Grid Orders](#)

### To enter multi-grid orders:

1. Go to Transactions > Sales > Enter Sales Orders 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 <b>Matrix Item Options</b> 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 of an item on 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](#).

Add to Order

Item Information

Item: Matrix item 3x3 : Matrix item 3x3-F-M

Row: Medium

Description:

Column: Female

Location:

Currency: USA

Quantity Available: 103

Rate: 3.00

Quantity On Hand: 103

Amount: 9.00

Quantity On Order: 0

Expected Ship Date:







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		

## 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. After you have submitted a grid order to the transaction, you can open and edit orders per 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 displayed 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 displayed 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

Orders that have been submitted through single or multi-grid order entry can be edited per template.

Review the following guidelines when 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. You must edit the grid order and reload the grid template or manually enter the changes in the line items.

- Users with no 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 displayed 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 [Creating Grid Orders](#). To view specific guidelines when updating multi-grid orders, see [Updating Multi-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 > List.
2. In the list of orders, click the Edit link for the specific order.
3. In the **Items** subtab of the order page, perform any of the following:
  - To enter a new grid order, click **Open Grid**.  
For instructions, see the following topics:
    - [Entering Single Grid Orders](#)
    - [Entering Multi-Grid Orders](#)

 **Note:** The **Open Grid** button is not available to users that do not 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.

 **Note:** 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 in the transaction 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.

## Grid Printing

Before you use grid printing, ensure that your account is updated with the required features and permissions. For the list of requirements, see the following topics:

- [Checking Prerequisites for Grid Order Management](#)
- [Roles and Permissions for Grid Order Management](#)

You can set preferences for printing grid orders and templates for each transaction or form. For instructions on how to set the preferences, see [Setting Grid Printing Preferences](#).

## Grid Printing Options

The following options are available for grid printing:

- [Standard Grid Order Printing](#) – Use this option to print grid orders in sales order, purchase order, and transfer order transactions.
- [Using Grid Print Templates](#) – Use this option to print matrix items in grid format for the following records:
  - cash sale
  - quote
  - invoice
  - packing slip



**Note:** Only packing slips for item fulfillments created from sales orders and transfer orders are supported by grid print templates.

- picking ticket
- purchase order
- sales order
- transfer order

Review the following key points for the grid printing options:

- Printouts are created in PDF. There is a 10 MB limit for each PDF file.
- Items must be set up in grid templates. To use grid print templates in particular, items must be set up in grid matrix templates.
- Unlike grid print templates, printouts for grid order printing cannot be customized.

- The number format for the printout follows the user preference settings in your account. For more information, see the help topic [Setting General Preferences](#).
- Grid printing is available on transaction pages only. This option is not available on the Print Checks & Forms page.
- By default, printouts include items that are not entered in a grid template. These items are displayed in the main item table.

For other considerations and limitations, see [Limitations of Grid Order Management](#).

## Standard Grid Order Printing

Ensure that you understand the following key points when using standard grid order printing:

- The printout of the grid order is optimized for the Landscape page orientation and standard A4 size. You may have to update your display or printer settings to view and print the complete page.
- There is a 4-column limit with 2 subcolumns each, for the attributes per table. Columns that exceed the limit are displayed in a separate table to prevent overlapping of text when too many columns are displayed in one table.
- Expense items are not included in the printout of a grid purchase order.
- For OneWorld accounts, the currency of the tax code summary is based on the currency of the subsidiary. The tax summary currency may be different from the transaction currency.
- Transaction columns on the printout that are specific to Grid Order Management are displayed only on transactions supported by grid printing.

## Using Grid Print Templates

Before you print matrix items in grid format, you must consider the following guidelines in your account setup:

- Grid print templates must be assigned to the specific transactions and forms. For more information, see [Setting Grid Order Management Preferences](#).
- The matrix items must be set up in grid matrix templates. For more information, see [Setting Up Grid Matrix Templates](#).

Ensure that you understand the following key points when using grid print templates:

- Grid printouts are optimized for the Portrait page orientation and for matrix items with 4 column attributes, having 2 subcolumns each. Overlapping of text might occur when you have too many attributes to display in the grid table.
- Blank rates in transaction line items are displayed with a value of zero in the grid table.
- The total value in the grid table is calculated based on rate and quantity. It may be different from the total value of the whole transaction, especially in cases where you use line item discounts, custom price levels, and blank rates.
- Line items for the same matrix item are consolidated in the grid table. If there are different rates for the same item in the sublist, only the rate of the last entered line item is displayed in the grid. For example, you entered two line items for Item A. If the first line item has a rate of 10 and the second line item has a rate of 15, the grid displays Item A with a rate of 15.



## Customizing the Grid for Printing Purchase Orders and Sales Orders

You can use custom grid print templates for sales orders and purchase orders. The standard grid print template is selected by default in the Purchase Order and Sales Order fields on the Grid Printing subtab of the Grid Preferences page.


To select a different template, custom templates must first be uploaded to the Grid Templates folder in the file cabinet. After uploading, the templates are available for selection in the dropdown list on the Grid Printing subtab.

An administrator or developer with knowledge of FreeMarker and JSON can customize the standard grid print template, including the grid.

### To customize the grid for printing purchase orders and sales orders:

The Grid Order Management SuiteApp provides standard grid print templates. You can create your custom grid print templates for purchase orders and sales orders based on the standard templates. The following table describes the recommended steps and procedures.

Step	Procedure
1. Download the standard templates provided by the Grid Order Management SuiteApp.	<ol style="list-style-type: none"> <li>Go to Documents &gt; Files &gt; File Cabinet.</li> <li>Click <b>SuiteBundles</b>.</li> <li>Click the <b>Bundle 41296</b> folder.</li> <li>Click the <b>src</b> folder.</li> <li>Click the <b>template</b> folder.</li> <li>Click the <b>Grid Printing</b> folder.</li> <li>Click the Download link of the following templates: <ul style="list-style-type: none"> <li><b>wd_gom_template_pogridprintout.xml</b> (for purchase order)</li> <li><b>wd_gom_template_sogridprintout.xml</b> (for sales order)</li> </ul> </li> </ol>
2. Edit the templates and save them with new names.	<p>Grid customization for printing is currently available for purchase order and sales order only.</p> <p>For information on editing the grid, see the following topics:</p> <ul style="list-style-type: none"> <li><a href="#">Record Types Used as References in Grid Print Templates</a></li> <li><a href="#">Example of a 2x2 Grid Printout</a></li> <li><a href="#">Sample 2x2 Grid in JSON Format as Seen in record.custbody_gridoe_productgrpdata</a></li> <li><a href="#">Sample Conversion of JSON Format to a 2x2 Grid</a></li> <li><a href="#">Sample FreeMarker Code Snippet for a 2x2 Grid Printout</a></li> </ul>
3. Upload the new templates to the File Cabinet.	<ol style="list-style-type: none"> <li>Go to Documents &gt; Files &gt; File Cabinet.</li> <li>Click the <b>Templates</b> folder.</li> <li>Click the <b>Grid Printing Templates</b> folder.</li> <li>Click <b>Add File</b> to select a file from your computer.</li> </ol>
4. To use the new template for printing, select the template names in the <b>Grid Print</b> subtab of the Grid Preferences page.	See <a href="#">Setting Grid Order Management Preferences</a> .
5. To display the grid in a custom	See the help topic <a href="#">Setting Custom Forms to Use Advanced Templates</a> .

Step	Procedure
Advanced PDF/HTML template, use the same FreeMarker snippet as seen from the custom grid printout template.	<div>  <b>Important:</b> Advanced PDF/HTML templates can access the field <code>record.custbody_gridoe_productgrpdata</code>. However, other references available for Grid Order Management custom grid printout templates may not be accessible in Advanced PDF/HTML templates. </div> <p>See also <a href="#">Sample FreeMarker Code Snippet for a 2x2 Grid Printout</a>.</p>

## Record Types Used as References in Grid Print Templates

Reference in FreeMarker Template	Record Type
record	Transaction
parameters	<p>Contains the following:</p> <ul style="list-style-type: none"> <li>■ <b>barcode</b> - Returns true if the Barcoding and Item Labels feature is enabled.</li> <li>■ <b>multiunitofmeasure</b> - Returns true if the Multiple Units of Measure feature is enabled.</li> <li>■ <b>itemoptions</b> - Returns true if the Item Options feature is enabled.</li> </ul>
subsidiaryRec	Subsidiary of the transaction
employeeSubsidiaryRec	Subsidiary of the logged in user
companyInformation	Company Information

## Example of a 2x2 Grid Printout

Grid ID      1 - Basic Crew Neck Tee					
Matrix Item Options	Small		Medium		Quantity per line
	Rate	Quantity	Rate	Quantity	
blue	100.00	1	100.00	1	2
red	100.00	1	100.00	1	2

## Sample 2x2 Grid in JSON Format as Seen in `record.custbody_gridoe_productgrpdata`

The following JSON format represents the 2x2 grid in the example, as seen in the `record.custbody_gridoe_productgrpdata` field.

```
[
  {
    "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 Conversion of JSON Format to a 2x2 Grid

The following table shows the conversion of the sample JSON format to the 2x2 grid printout example.

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



```

        </#list>
    </#list>
</tr>
</thead>

<tbody class="grid_table_body">
<#list gridData.grid.data as row>
<#assign qtyline = 0>
    <tr>
        <td class="grid_row_attribute">${row.rowattribute}</td>
        <#list row.columnids as colid>
            <#list subcolumns as subcolumn>
                <td>
                    <#assign tmpid = row[colid]['internalid']?c>
                    <#if tmpid?has_content>
                        <#if itemdetails[tmpid]?has_content>
                            <#if subcolumn?lower_case == 'quantity'>
                                <#assign qtyline = qtyline+(itemdetails[tmpid][subcolumn?lower_case])?number>

                                ${itemdetails[tmpid][subcolumn?lower_case]}
                            <#else>
                                ${itemdetails[tmpid][subcolumn?lower_case]?string["",##0.00"]}
                            </#if>
                        <#else>
                            <#if subcolumn?lower_case == 'quantity'>
                                ${0}
                            <#else>
                                ${0?string["",##0.00"]}
                            </#if>
                        </#if>
                    </#if>
                </td>
            </#list>
        </#list>
        <!-- QUANTITY PER LINE -->
        <td>${qtyline}</td>
    </tr>
</#list>
</tbody>
</table>
</#list>
<#--- END GRID ---->

```

### Important Notes

- Convert `null` to `string "null"` when evaluating `record.custbody_gridoe_productgrpdata`. This is necessary because FreeMarker is unable to recognize null values. See the `parseJson` function in the sample code snippet.
- The field `record.custbody_gridoe_productgrpdata` does not contain details about the item in the grid. Added information about the item must be gathered from the item sublist of the transaction record. See `record.item` in the code snippet.
- You must include the following code when accessing the grid data.

```
<#assign gridfield = "{\"grids\": ${record.custbody_gridoe_productgrpdata} }">
```

## Customizing Advanced Print Templates for Grid Printing

You can customize advanced print templates to enable grid printing of matrix items for the following transactions:


- quote
- cash sale
- invoice
- picking ticket
- packing slip
- purchase order
- sales order

After customizing the templates, you must store them in the File Cabinet. For more information, see the following topics:

- [Using Grid Print Templates.](#)
- [Using Advanced PDF/HTML Templates to Customize Grid Printing Templates](#)
- [Uploading Customized Grid Printing Templates](#)

## Using Advanced PDF/HTML Templates to Customize Grid Printing Templates

Perform the following steps to use the Advanced PDF/HTML Templates feature for creating custom grid printing templates.

 **Note:** To update advanced PDF/HTML templates, you must have sufficient CSS and HTML knowledge. For more information, see the help topic [HTML Markup Source Editing in the Template Editor](#).

### To customize advanced print templates for grid printing:

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:
  1. `{cssContent}`  
Insert this within the `<style> </style>` tags. This is for the formatting display of the grid table.
  2. `{GOM_GRIDS}`  
Insert this within the `<body> </body>` tags, where you want to display the grid table. This is the placeholder for the grid table. In the default grid print templates, the grid table is displayed below the main item table.
5. Click **Save**.  
Click **Preview** if you want to view the changes before saving. For more information about advanced templates, see the help topic [Advanced PDF/HTML Templates](#).

After editing the advanced template, you must copy its contents to an XML file.

6. Create an XML file and copy all the contents of the advanced print template into this file.

You now have an XML file of the grid print template. Refer to the following instructions for storing your grid print templates in the File Cabinet.

## Uploading Customized Grid Printing Templates

Perform the following steps to upload your customized grid printing templates in the correct folder in the File Cabinet.

### To add grid print templates to the Grid Printing Templates folder:

1. Go to Documents > Files > File Cabinet.
2. On the File Cabinet page, click Templates, then click Grid Printing Templates.
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 you have stored your custom grid print templates in the File Cabinet, the templates become available for selection on the Grid Print subtab of the Grid Preferences page. To assign grid print templates to transactions, see [Setting Grid Order Management Preferences](#).

## Single Transaction Grid Printing

You can print transactions or forms with grid orders or with assigned grid print templates. The printout contains select company details, basic order information, and ordered items on the grid template. At the end of the printout is a summary of the totals, including a tax summary if applicable to the type of account. If your order has more than one grid template, all grid templates are included in the printout.

### To print single transactions with grid orders:

1. Go to Transactions > (Transaction type).  
Follow the standard path for viewing or printing the transaction or form. For example:
  - To view a purchase order, go to Transactions > Purchases/Vendors > Enter Purchase Orders > List.
  - To print a picking ticket, go to Transactions > Sales > Enter Sales Orders > List.
2. On the list page, click the View link for the transaction.
3. On the transaction page, click **Print Grid**.  
For picking tickets, click **Print Grid Picking Ticket**. For packing slips, click **Print Grid Packing Slip**.  
The system displays a preview of the printout.



**Note:** The **Print Grid** option does not display in edit mode.

## Bulk Grid Printing

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


Key points when using bulk grid printing:


- File generation for more than 200 transactions might 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 10MB, separate files are generated automatically when printing a large number of transactions. For more information, see the help topic [Script Usage Unit Limits](#).
- On the Bulk Grid Printing page, the maximum number of rows displayed 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, [Setting General 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](#).

### To print transactions in bulk:


1. Go to Lists > Grid Order Entry > Bulk Grid Printing.
2. In the **Document Type** field in 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	<p>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.</p> <ul style="list-style-type: none"> <li>■ Use Date From without Date To, if you want to retrieve all documents based on or later than the start date.</li> <li>■ Use Date To without Date From, if you want to retrieve all documents based on or earlier than the end date.</li> </ul>
Location	<p>Select the location of the documents you want to retrieve. Only locations in the transaction header are available for selection.</p> <div style="border: 1px solid #0070c0; padding: 5px; margin: 5px 0;"> <p> <b>Note:</b> Filtering by location is not applicable to packing slips.</p> </div> <ul style="list-style-type: none"> <li>■ Selecting <b>All</b> retrieves documents across all locations and includes those without location settings in the transaction header.</li> <li>■ Selecting <b>None</b> retrieves only documents without location settings in the transaction header.</li> </ul>
Allow Reprinting	<p>Check the box to retrieve documents that have been previously printed. Otherwise, these documents are not included in your search results.</p>

 **Note:** 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.

 **Tip:** 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

- [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.


**Note:** 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 displayed.
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.
Status	Select the bulk grid printing status of the files associated with the logs.
Date From / Date To	<p>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.</p> <ul style="list-style-type: none"> <li>■ Use Date From without Date To, if you want to retrieve all records based on or later than the start date.</li> <li>■ Use Date To without Date From, if you want to retrieve all records based on or earlier than the end date.</li> </ul>
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.

Field Name	Description
	 <b>Note:</b> Non-administrators cannot use the <b>Printed By</b> filter. They can only view the logs for PDF files printed by themselves.

 **Note:** 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 displayed on the current page, click **Delete All Logs & Files**.

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

## Viewing Matrix Items in Grid Format

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](#).

SELECT COLUMN VIEW

Size


SELECT LOCATION

- All -

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	

Key points for the grid view:

- The **Grid Matrix Information** subtab is available on parent matrix item records for 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 displayed in base unit.
  - There is a maximum limit of 500 items that can be displayed 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](#).
-  **Tip:** 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 displayed.
  - Updates to matrix item options are automatically reflected in the grid.


## Changing the item column display


You can change the item option displayed 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 displayed in the grid. To narrow the results, select the specific location of items to be displayed in the **Select Location** field.

 **Note:** To use the % wildcard in the **Name** field, see [Limitations of Grid Order Management](#) for the supported combinations. Results might not be displayed due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

 **Tip:** 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.

## Importing Data for Grid Sales Orders and Purchase Orders

You can import the data of a transaction to your account by using the following methods:

- [CSV Imports for Grid Sales Orders and Grid Purchase Orders](#)
- [Web Services Support for Grid Sales Orders and Grid Purchase Orders](#)

## CSV Imports for Grid Sales Orders and Grid Purchase Orders


When you use CSV Import for sales orders and purchase orders, you can do the following options in the imported transaction record:

- View the templates associated to the item record - See [Viewing the Template of the Item Record](#).
- Print the grid from the transaction record - See [Printing the Template from CSV Import](#).

You must follow these guidelines in importing sales orders and purchase orders:

- The CSV file must contain a Grid Item ID and Grid Template columns. These columns must correspond to an existing grid template. The Grid Template column must contain the internal ID of the grid template instead of the template name.  
To identify the template IDs, go to List > Grid Order Entry > Grid Templates. Use the internal ID that corresponds to the grid template. The values in the Grid Item ID column are used to identify the order of the templates.
- Add the Grid Template and Grid Item ID in the field mapping step when importing CSV records.

For more information on CSV imports, see the help topic [Importing CSV Files with the Import Assistant](#).

 **Note:** You can only import up to 100 distinct grid templates.

### Viewing the Template of the Item Record

When the CSV import is finished, it becomes available in the transaction type. You can view the templates associated to the sales order or purchase order CSV import. You can also apply changes to the CSV import by editing the item record.

**To view the template of the item record:**

1. Go to Transactions > (Transaction type).  
Follow the standard path for viewing the list for a specific transaction type. For example, to view the list of sales orders, go to Transactions > Sales > Enter Sales Orders > List.
2. On the transaction type list, search for the CSV import.
3. Click **View**. The item is displayed with the templates associated to that record.
4. To edit the template, click the link of the template in the **Link** column.

### Printing the Template from CSV Import

After the import is finished, you can print the grid directly from the CSV import that you created.

**To print the grid from the CSV import:**

1. Go to Transactions > (Transaction type).  
Follow the standard path for viewing the list for a specific transaction type. For example, to view the list of sales orders, go to Transactions > Sales > Enter Sales Orders > List.

2. Click **Print Grid**.

## Best Practices for CSV Imports of Sales Orders and Purchase Orders

To successfully import sales orders and purchase orders transactions, you must apply certain conditions in the CSV file that you create. If the CSV file do not meet these conditions, the import results to a Failed status.

Before you start importing your records, ensure that the following conditions are applied:

- The Grid Item ID and Grid Template must be specified. Ensure that the values specified in the Grid Template column are valid template IDs.
- A grid item ID must be assigned to one grid template only.
- The items specified in the CSV file must belong to the correct grid template.
- An item can only be used once for each grid template.
- Grid templates with the same grid item ID must be grouped and arranged in sequence.
- You can only import up to 100 distinct template per transaction.
- The Grid Template must be in numeric format.
- The Grid Item ID must have a value of 1 or higher.

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

Web Services is another method to import transactions to your account. Similar to CSV Import, ensure that the Grid Item ID and Grid Template values are available to successfully import transactions to your NetSuite data.

For more information on using Web Services, see the help topic [SuiteTalk \(Web Services\)](#).