3D Matrices: Tutorial on how to set up a 3D Matrix

Inventory Management · https://retailedge.com/docs/3d-matrices-tutorial-on-how-to-set-up-a-3d-matrix

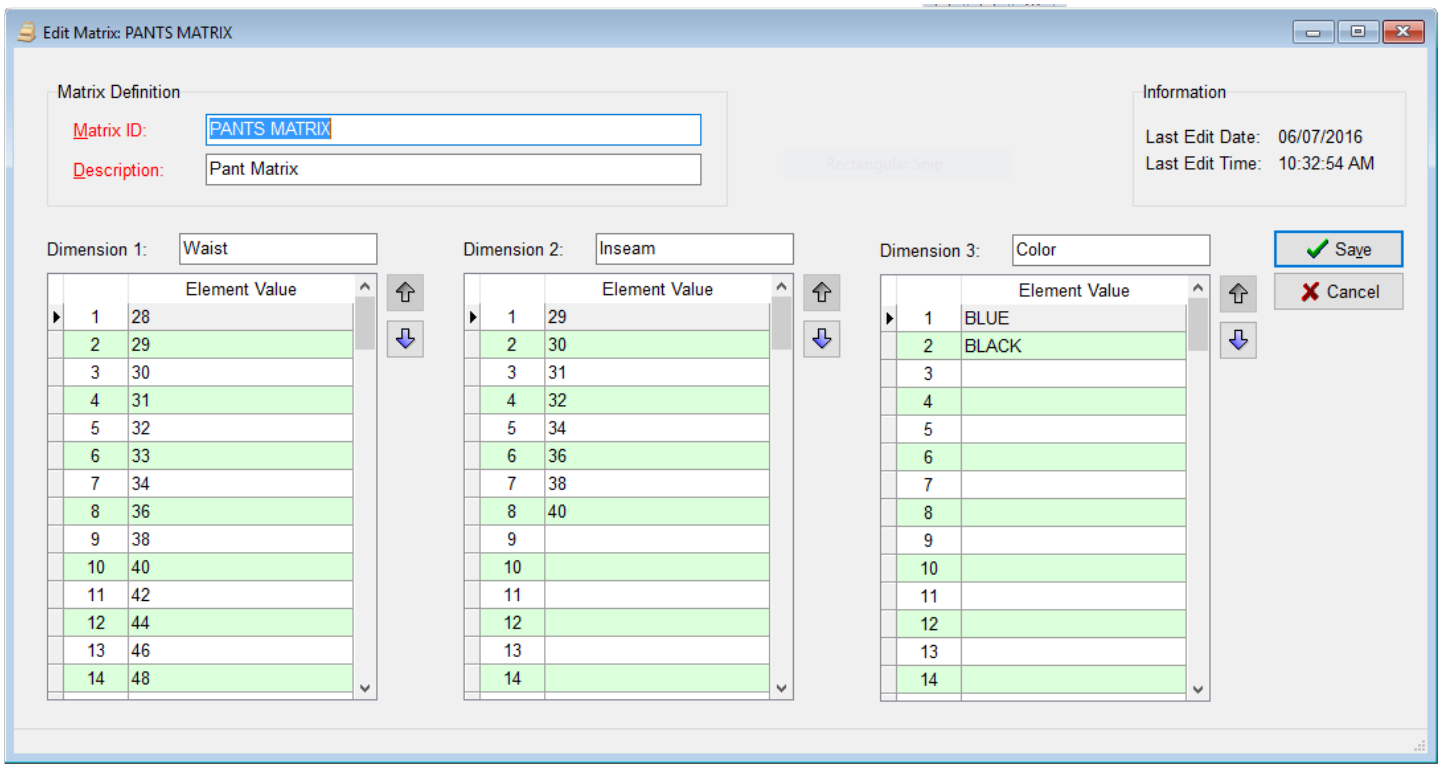
Using RetailEdge's matrixes to create items can be very useful if you have items that are sized (length/width, size/color, etc.). This topic describes how to setup 3 dimensional matrix items in RetailEdge, however there are other posts about easier 2D matrices, such as this introductory piece on How do Matrix Definitions work.

Before Getting Started

Before we dive into all things 3D matrices, it would be beneficial for you to read this post on How and When should I use matrixes to create inventory items?

Setup a Matrix Definition

The first step in this tutorial is to set up a Matrix Definition in RetailEdge. This is a template that is used for creating the items. Here we use Jeans as an example. To start, we need to setup a "Pants" Matrix Definition. To setup a Matrix Definition, choose **Matrix Definitions** from the Inventory menu item, then press the **Add** button. For a pants matrix we will need three dimensions: Waist, Inseam, and Color. Create the matrix definition as shown below and press **Save**.

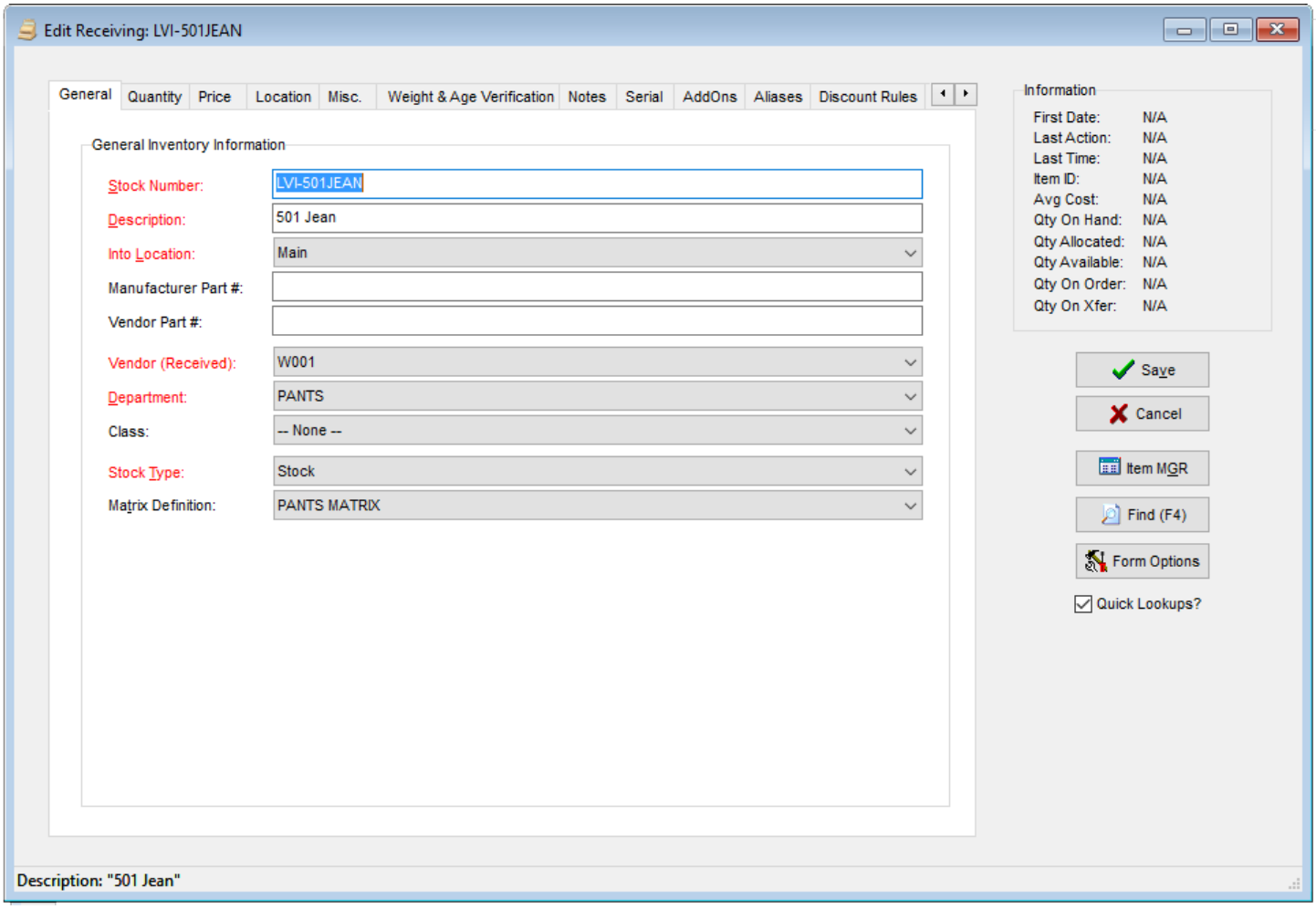


Things To Consider Before Creating Matrix Items

Care should be taken when creating a matrix definition. Here are some things to think about when you are doing it.

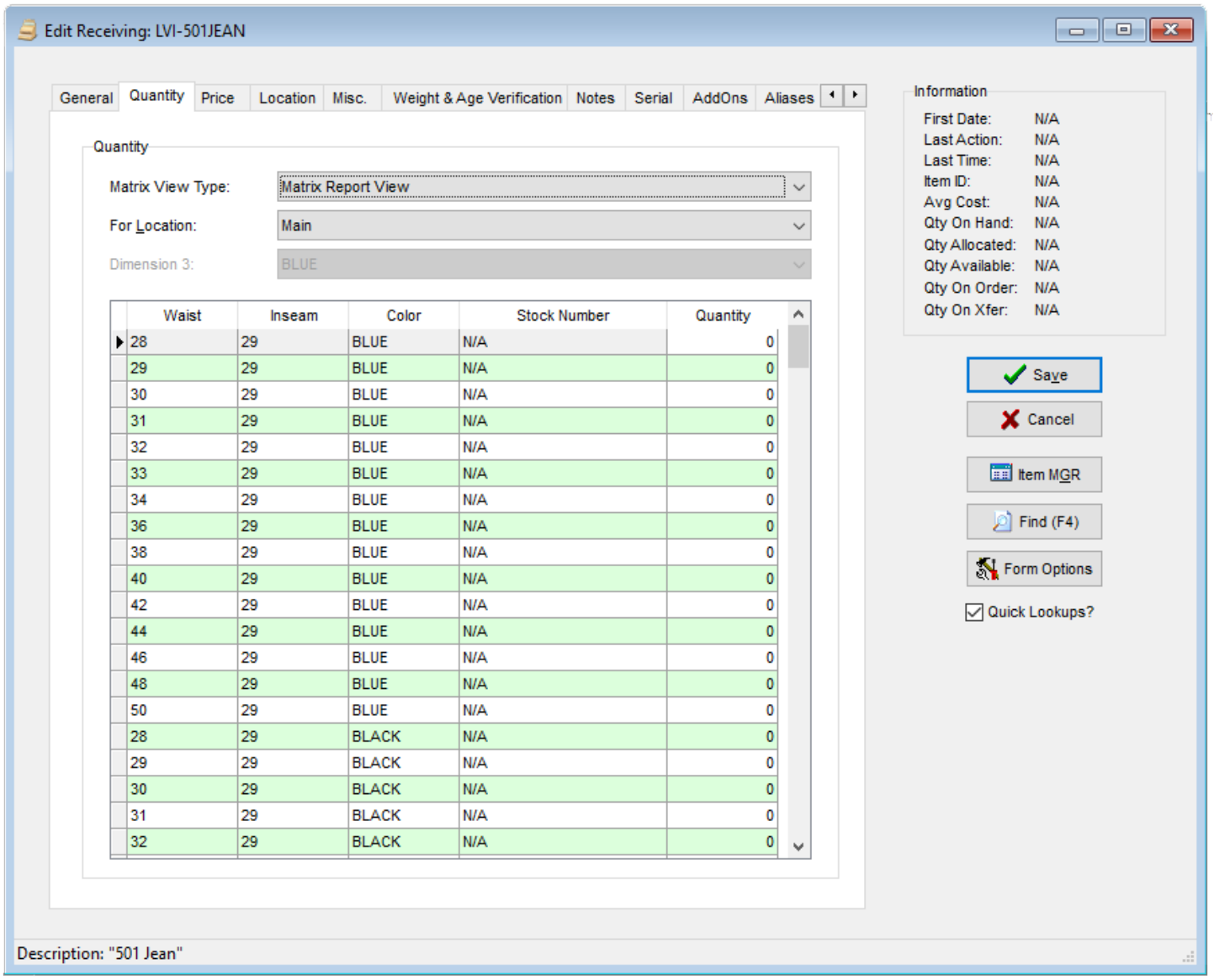
Create The Matrix Parent

Once you have created the Matrix Definition, you can now create the Matrix item. Creating the matrix item similar to creating a non-matrix item, except you will be creating a parent matrix item and associating it with the matrix definition (the “pants” matrix). In this case we will be creating the item in the receiving file which is the preferred method of entering items for many reasons.



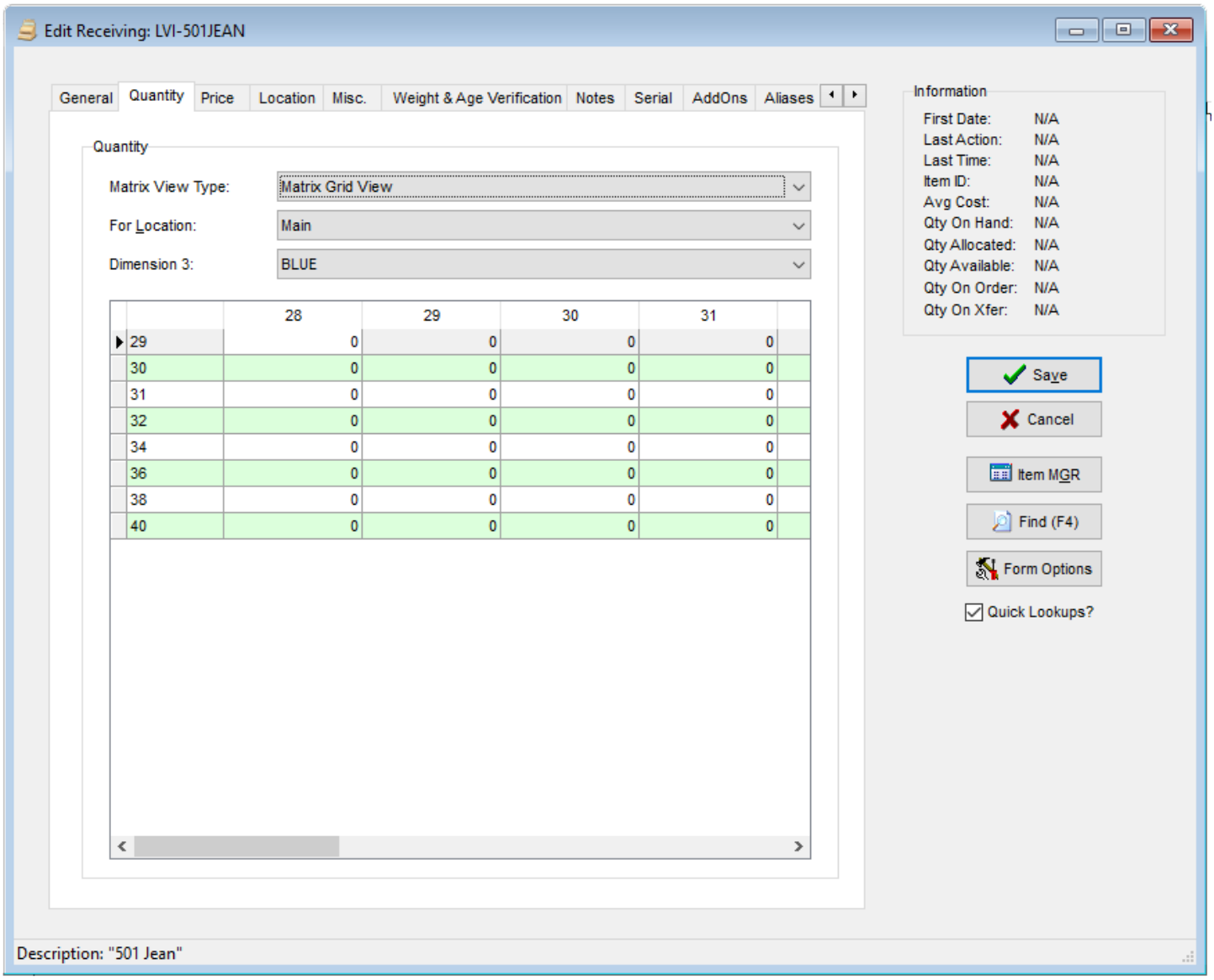
Once a matrix definition has been associated with the item you are creating, the Quantity tab will display Matrix View quantities. and you will be able to enter quantity information for all children items associated with this matrix parent. RetailEdge allows you to view three different Matrix View Types:

Matrix Report View: This view can make it easy to see the matrix items in a list view. It can be re-sorted by each of the column headers (each of the dimensions, the stock number or quantity).

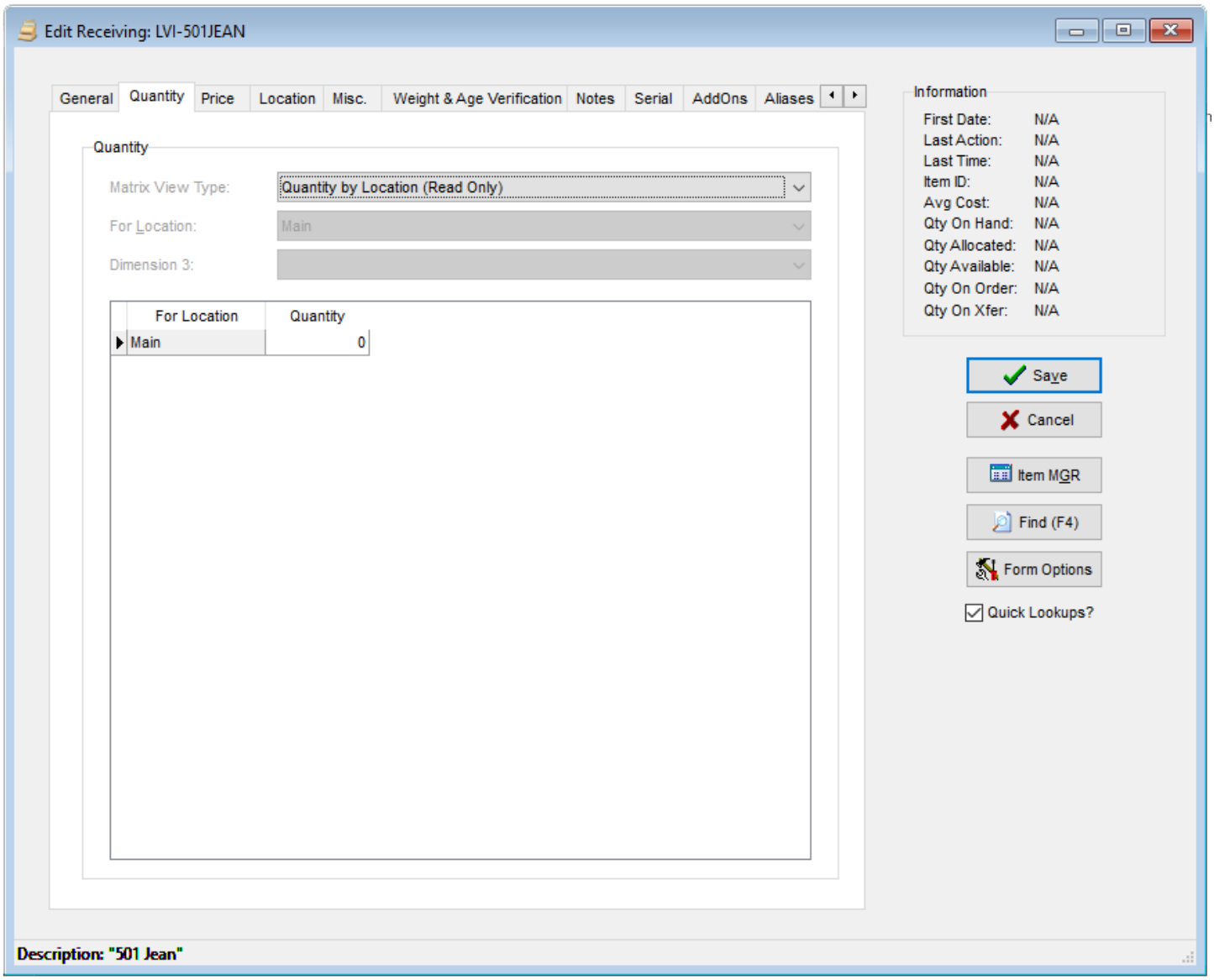


Matrix Report View (Exclude Zeroes): This is the same at the Matrix Report View but shows only items with positive quantities. This can greatly shorten the list and is useful if you are only carrying a portion of the number of items in a matrix.

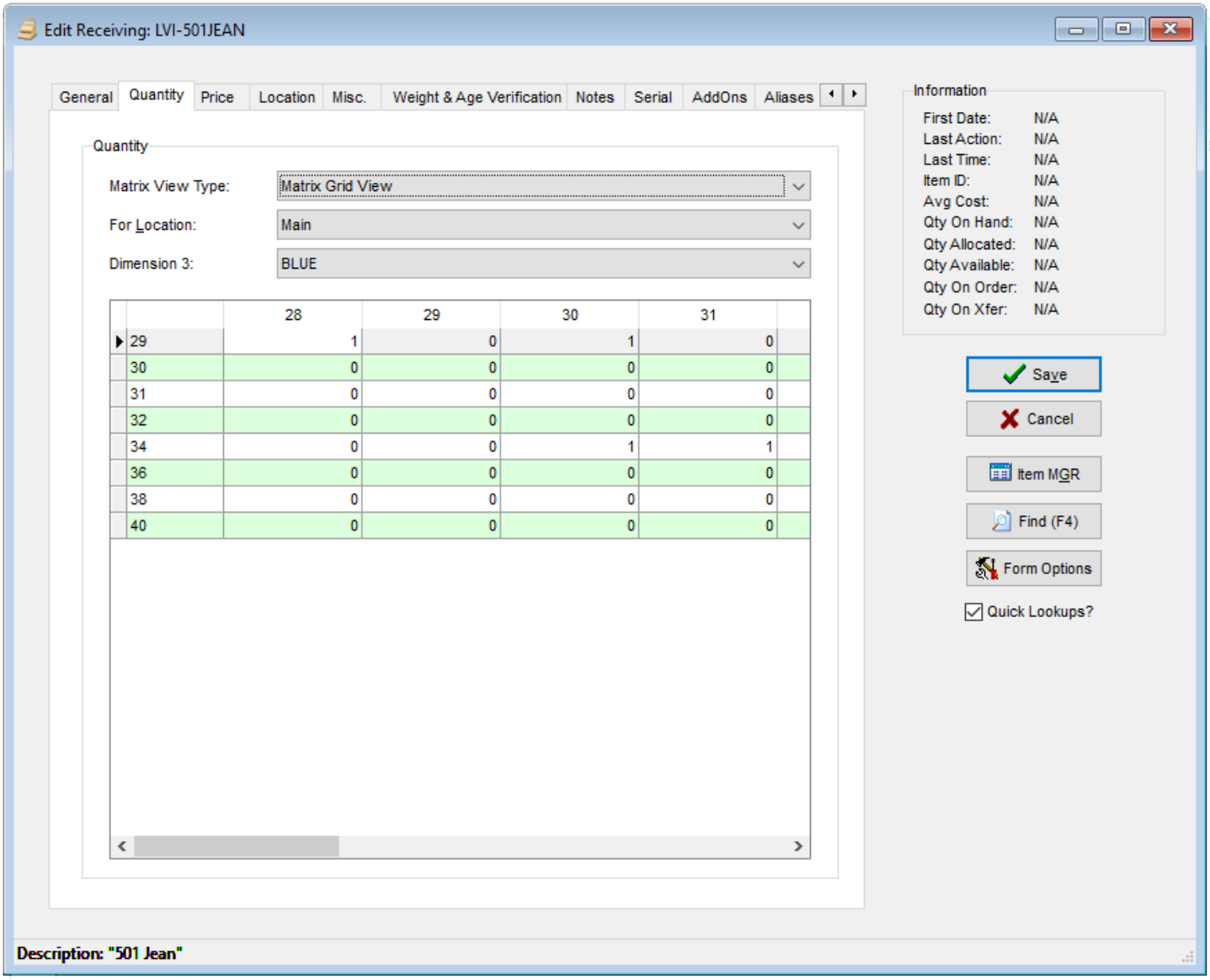
Matrix Grid View. The grid view will show your quantity of matrix items in an X, Y or Dimension 1, Dimension 2 grid. This can help you see visually where you might have some holes in your inventory and need to fill in. The third dimension is a drop down that will allow you to switch your grids for each third dimension. In our case Color is the third dimension.



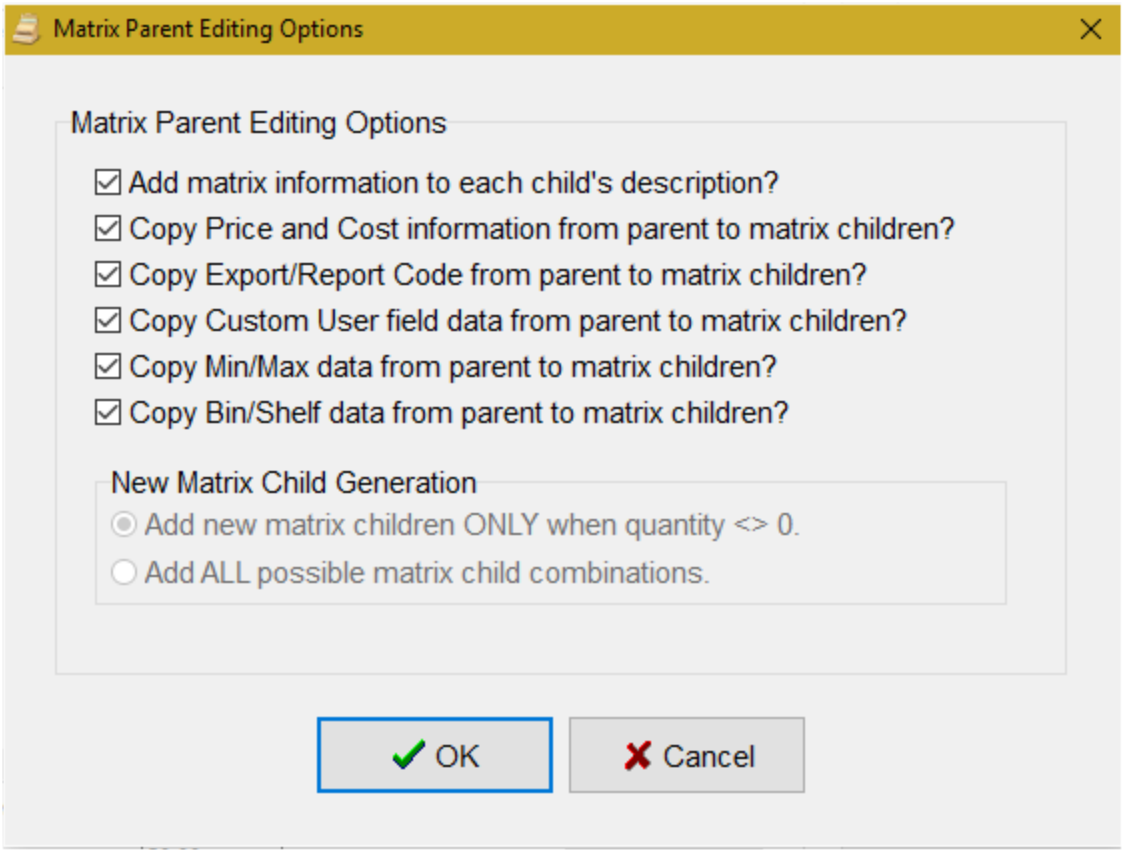
Quantity by Location (Read Only): This is useful for multi-location and can show you how many of the entire style you have in each location.



In any of the non-read only views, enter the quantities for the individual sizes/colors you are receiving or editing and press the Save button.



You will then see a Parent Editing Option screen.



Matrix Parent Editing Options

Since you are creating/editing a number of items, you will need to select whether you want to:

-Add matrix information to each child's description.

-Copy Price and Cost information from parent to matrix children.

-Copy Export/Report Code from parent to matrix children.

-Copy Custom User field data from parent to matrix children.

-Copy Min/Max data from parent to matrix children.

-Copy Bin/Shelf data from parent to matrix children

Having all of these options checked is common, but sometimes you might not want certain fields populated or overwritten. For instance, you might have special pricing on XXL items. Or you might not want certain items to be Exported to your website and so don't want your export code being copied to the individual items.

The other option on this screen is:

When creating New Matrix Child Generation, to:

-Add new matrix children ONLY when quantity <> 0

-Add ALL possible matrix child combinations.

It is VERY important to pay attention here. Many times you have a matrix definition that has size or colors that you don't carry or might not be applicable to this item. In this case you would only add new matrix children when the quantity <> 0. This can create a lot of data quickly if you select the wrong option. *It is important to note here that when pushing matrix children up to Shopify, Shopify has a 99 item limit when creating variants of a product.

Then press the **OK** button.

Creation of Matrix Children

RetailEdge will then create a different size and color option for each quantity selected in the quantity grid. And in our case added the matrix to each description which will make it easier to search on the item and provide more useful information on the barcode label.