Grid Order Management
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Grid Order Management

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

- Grid Order Management Overview
- Setting Up Grid Order Management
  - Prerequisites for Grid Order Management
  - Installing the Grid Order Management SuiteApp
  - Roles and Permissions for Grid Order Management
  - Setting Grid Order Management Preferences
- Setting Up Grid Templates
  - Setting Up Grid Matrix Templates
  - Setting Up Grid Item Templates
- Creating Grid Orders
  - Entering Single Grid Orders
  - Entering Multi-Grid Orders
  - Editing Grid Orders
- Grid Printing
  - Customizing Grid Print Templates
  - Customizing Advanced Grid Print Templates
  - Single Transaction Grid Printing
  - Bulk Grid Printing
- Viewing Grid Matrix Information
- Importing Data for Grid Purchase Order and Sales Order Transactions

Grid Order Management Overview

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

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

This SuiteApp has the following features:

- **Grid Order Entry** – This feature lets you enter order transactions in grid format. Grid Order Entry is available for purchase orders, sales orders, transfer orders, and quotes. For more information, see Creating Grid Orders.

- **Standard Grid Order Printing** – This feature lets you print transaction records in grid format. Standard Grid Order Printing is available for purchase orders and sales orders. For more information, see Standard Grid Order Printing.

- **Grid Print Templates** – This feature lets you use grid print templates for transactions where grid order entry or standard grid printing is not available. Grid Print Templates is available for cash
sales, invoices, packing slips, picking tickets, purchase orders, quotes, and sales orders. For more information, see Grid Print Templates.

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

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

<table>
<thead>
<tr>
<th>Transactions</th>
<th>Available Features</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grid Order Entry</td>
</tr>
<tr>
<td>Cash sale</td>
<td>N</td>
</tr>
<tr>
<td>Inventory adjustment</td>
<td>Y</td>
</tr>
<tr>
<td>Invoice</td>
<td>N</td>
</tr>
<tr>
<td>Packing slip</td>
<td>N</td>
</tr>
<tr>
<td>Picking ticket</td>
<td>N</td>
</tr>
<tr>
<td>Purchase order</td>
<td>Y</td>
</tr>
<tr>
<td>Quote</td>
<td>Y</td>
</tr>
<tr>
<td>Sales order</td>
<td>Y (1)</td>
</tr>
<tr>
<td>Transfer order</td>
<td>Y</td>
</tr>
</tbody>
</table>

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

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

For 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 web browsers.

**Grid Order Management SuiteApp Availability**

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

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:
Setting Up Grid Order Management

- 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 and 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 transactions and forms. Transaction records created prior to the release of Grid Order Management SuiteApp version 6.01.0 appear as a basic report in the printout. To display old transaction records in grid format, you must click Edit and then click Save on the transaction record. You do not need to perform this step for standard grid order printing. For more information, see **Grid Printing**.
- Grid order printing is not available for inventory adjustments.
- Multi-Grid Order Entry is available only for sales orders.
- The Grid Order Entry form does not show on mobile devices.
- You can use the % wildcard character to search for specific values. This search applies to locations on the Grid Matrix Information subtab of parent matrix item records and templates on the transaction’s Grid Order Entry form. See the following examples to search for column values that begin, end, or contain the characters you specify:
  - str% – Retrieves values that begin with str
  - %str – Retrieves values that end with str
  - %str% – Retrieves values that contain str

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 Grid Matrix Information

Setting Up Grid Order Management

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

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

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

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

  **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 enter on the Grid Order Entry form is assigned as ship date for all items in the grid. This condition only applies to items that are submitted for the first time. For more information, see *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, on the *Items & Inventory* subtab, check the *Multi-Location Inventory* box.

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

- **Features for estimates**
  - On the *Transactions* subtab, check the *Estimates* box.

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

Installing the Grid Order Management SuiteApp

**Note:** Only administrators can install this SuiteApp.

Set the required preferences and enable required features before installing this SuiteApp. For more information, see *Prerequisites for Grid Order Management*. 

Grid Order Management
To install the Grid Order Management SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search & Install Bundles page, use the following information to search for the SuiteApp:
   - Bundle Name: Grid Order Management
   - Bundle Id: 41296
   - Availability: Shared
3. (Optional) Click the Grid Order Management link to display its Bundle Details page.
   - The Admin Documentation provides a link to the help topic.
   - The Overview subtab displays the SuiteApp abstract and description.
   - The Components subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.
   For more information, see the help topic Bundle Details.
4. Click Install.
   - If asked, indicate your agreement to allow NetSuite to automatically upgrade the SuiteApp in your account when new updates become available.
   - During the installation, you can click Refresh to get the latest status.

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

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

Roles and Permissions for Grid Order Management

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

- Grid Order Management Custom Roles
- Grid Order Management Permissions

Grid Order Management Custom Roles

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

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

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

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

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>Lists &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
<tr>
<td>CEO - Grid Order Entry</td>
<td>Sales/Marketing &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
<tr>
<td>CFO - Grid Order Entry</td>
<td>Customers &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
<tr>
<td>Sales Manager - Grid Order Entry</td>
<td>Customers &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
<tr>
<td>Sales Vice President - Grid Order Entry</td>
<td>Customers &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
<tr>
<td>Sales Administrator - Grid Order Entry</td>
<td>Customers &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
<tr>
<td>Sales Person - Grid Order Entry</td>
<td>Customers &gt; Grid Order Entry &gt; Grid Templates</td>
</tr>
</tbody>
</table>

**Grid Order Management Permissions**

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

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

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

<table>
<thead>
<tr>
<th>Permission</th>
<th>Subtab</th>
<th>Minimum Permission Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Attribute</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Grid Item</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Grid Item Template</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Grid Matrix</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Grid Matrix Template</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Grid Order Item</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Grid Order Template</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>GOE - Preferences</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>Grid Attribute</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>Grid Attribute - Value</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
<tr>
<td>Grid Template</td>
<td>Custom Record</td>
<td>Full</td>
</tr>
</tbody>
</table>
Setting Up Grid Order Management

### Permission | Subtab | Minimum Permission Level
---|---|---
Custom Record Types | Setup | Edit
Custom Item Fields | Setup | Edit
Custom Record Entries | Lists | Edit
Location | Lists | View
Accounting Lists | Setup | View

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

### Permission | Subtab | Minimum Permission Level
---|---|---
Documents and Files | Lists | Full

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

<table>
<thead>
<tr>
<th>Type</th>
<th>Form Name</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Attribute</td>
<td>Standard Apply Attribute Form</td>
<td>-</td>
</tr>
<tr>
<td>Apply Attribute</td>
<td>GOE - Apply Attribute Form</td>
<td>Set as preferred</td>
</tr>
<tr>
<td>GOE - Grid Item</td>
<td>Standard GOE - Grid Item Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Grid Item Template</td>
<td>Standard GOE – Grid Item Template Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Grid Matrix</td>
<td>Standard GOE – Grid Matrix Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Grid Matrix Template</td>
<td>Standard GOE – Grid Matrix Template Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Grid Order Item</td>
<td>Standard GOE – Grid Order Item Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Grid Order Template</td>
<td>Standard GOE – Grid Order Template Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Grid Template</td>
<td>Standard GOE - Grid Template Form</td>
<td>-</td>
</tr>
<tr>
<td>GOE - Preferences</td>
<td>Standard GOE - Preferences Form</td>
<td>-</td>
</tr>
<tr>
<td>GOM Apply Attribute Log</td>
<td>Standard GOM Apply Attribute Log Form</td>
<td>-</td>
</tr>
<tr>
<td>GOM Background Process Request Log</td>
<td>Standard GOM Background Process Request Log Form</td>
<td>-</td>
</tr>
<tr>
<td>Grid Attribute</td>
<td>Standard Grid Attribute Form</td>
<td>-</td>
</tr>
<tr>
<td>Grid Attribute</td>
<td>GOE - Grid Attribute Form</td>
<td>Set as preferred</td>
</tr>
<tr>
<td>Grid Attribute - Value</td>
<td>Standard Grid Attribute - Value Form</td>
<td>-</td>
</tr>
<tr>
<td>Grid Attribute - Value</td>
<td>GOE - Grid Attribute - Value Form</td>
<td>Set as preferred</td>
</tr>
</tbody>
</table>

**Setting Grid Order Management Preferences**

You can set preferences for the Grid Order Entry form, grid printing, and preferred grid template.
Note: The navigation paths used in these instructions are based on the Administrator role. If you are not an administrator, you may see a different view of the NetSuite center. For more information, see Roles and Permissions for Grid Order Management.

Setting Grid Order Preferences

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

To set grid order preferences:

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

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

   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 enabled by default.
   - Show Percentage Column - Check this box to show the percent columns on the Grid Order Entry form. This preference is enabled by default.
   - Enable Multi-Grid Order Entry – Check this box to enter grid orders using multiple templates in one Grid Order Entry form. The Order Summary table on the Grid Order Entry form lists the orders you entered in the grid templates. For more information, see Entering Multi-Grid Orders.
3. Click Save.

Setting Grid Printing Preferences

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

To set grid printing preferences:

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

   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 standard print template or customized print template that you can use for grid printing. If you do not want to set up grid printing, select the No Grid Template option from the list.
By default, the standard grid templates provided in the Grid Order Management SuiteApp are selected for the following transactions and forms:

- **Cash Sale** – wd_gom_template_csgridprintout.xml
- **Invoice** – wd_gom_template_ivgridprintout.xml
- **Packing Slip** – wd_gom_template_psgridprintout.xml
- **Picking Ticket** – wd_gom_template_ptgridprintout.xml
- **Purchase Order** – wd_gom_template_pogridprintout.xml
- **Quote** – wd_gom_template_qtgridprintout.xml
- **Sales Order** – wd_gom_template_sogridprintout.xml

4. Click **Save**.

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

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

### Setting Preferred Grid Template Preference

The preferred grid template preference lets you set the value of the **Set As Preferred Grid Template** box visible during creation of grid matrix templates.

**To set the preferred grid template preference:**

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

   When this box is checked, the **Set As Preferred Grid Template** box on the Grid Matrix Template and Bulk Create Grid Matrix Template pages is also checked. Leave the box checked so that when creating a matrix template it automatically becomes the preferred grid template. You can override this preference when creating or editing a matrix template. For more information, see [Creating Single Grid Matrix Templates](#) and [Creating Grid Matrix Templates in Bulk](#).

### Setting Up Grid Templates

You can set up either 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. Read the following topics for more information about each of these templates:

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

### Guidelines for Setting Up Grid Templates

Note the following guidelines when setting up grid templates:
Grid Order Management can optimally handle up to 1000 matrix templates and 1000 item templates.

**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 of 200 values as grid attributes. To determine if a grid template exceeds the maximum number set for grid attributes, multiply all values specified for each grid attribute. You cannot create grid templates for parent items with more than 200 grid attributes.

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

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

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

When you add or remove an attribute of a matrix item, you must also refresh the grid matrix template associated to the item record. To get the updated matrix items for the grid matrix template, go to Lists > Grid Order Entry > Grid Templates. Click the **Edit** link beside the template. Click **Get Item**, then click **Save**.

You can only create grid matrix templates for matrix parent items that contain matrix subitems.

Creating grid matrix and grid item templates on order transactions using CSV Import and SOAP web services are not supported.

For consistency, avoid changing the names of used grid templates. Template names shown in associated transactions are not updated automatically when the template names are changed. However, if you change a template name, it is shown in new grid line items that you add to associated transactions. This behavior results in transactions where line items use the same template but display either the previous or updated name. Names that are shown in line items are also used for printouts generated through standard grid order printing only.

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

**Setting Up Grid Matrix Templates**

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

You can create grid matrix templates individually or in bulk. For instructions, read the following topics:

- Creating Single Grid Matrix Templates
- Creating Grid Matrix Templates in Bulk
- Creating a Copy of the Grid Matrix Template
- Assigning Preferred Grid Templates
You can view the list of grid matrix templates in Lists > Grid Order Entry > Grid Templates. To edit a template, click the Edit link of the template record. You can modify the settings and percentages assigned to the attribute values.

**Important:** If you update a template, existing orders that use the template are not updated automatically. For more information, see Editing Grid Orders. 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.

## Creating Single Grid Matrix Templates

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

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

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 shown. For more information, see Prerequisites for Grid Order Management.

3. On the Grid Matrix Template page, do the following in the Matrix Item Definition section:
   a. In the **Name** field, enter a name for the grid matrix template.
   b. In the **Matrix Item** field, select the matrix item you want to configure.
      
      When you select a matrix item, the system populates the **Category** field with the item’s properties. It also sets default values in the **Column Attribute** and **Row Attribute** fields. If the matrix item is defined by more than two properties or categories, one property is automatically assigned as the column attribute and the other properties as row attributes.
   c. (Optional) In the **Description** field, enter a grid template description. The limit is 300 characters.
   d. Leave the **Set As Preferred Grid Template** box checked to set the template you are creating as the preferred grid template.
      
      Having a preferred grid template simplifies the process of assigning templates to inventory matrix items. When a template is set as preferred, it automatically becomes the template for the selected matrix item and all child items under it. Clear the **Set As Preferred Grid Template** box if you do not want to set this template as the preferred grid template.
      
      By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting Preferred Grid Template Preference.

   **Note:** You can only assign a preferred grid template to inventory matrix items.

4. In the Grid Template section, do the following:
   a. In the **Column Attribute** field, select a property to designate as the column attribute.
      
      When you change the column attribute, the value you replaced is automatically assigned in the **Row Attribute** field.
b. In the **Available In** field, select the transactions where you want the grid template to be available.

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

**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.

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

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

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

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

- Entering Single Grid Orders
- Entering Multi-Grid Orders

### Creating Grid Matrix Templates in Bulk

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

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

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

#### To create grid matrix templates in bulk:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. In the Grid Templates list, click **Bulk Create Grid Matrix Templates**.
3. On the Bulk Create Grid Matrix Templates page, click the dropdown arrow beside the **Parent Matrix Items** list box.

4. In the popup list, click an item name from the left pane to select it. Selected items are transferred to the right pane. To remove an item from the Current Selections list, click the **x** icon.

5. Click **Done**.

6. In the **Column Attribute** field, select the attribute that you want to show as the column header in the grid matrix template. After you select the column attribute, the other attributes become row attributes in the grid template.

7. Leave the **Set As Preferred Grid Template** box checked to set the template you are creating as the preferred grid template. Having a preferred grid template simplifies the process of assigning templates to inventory matrix items. When a template is set as preferred, it automatically becomes the template for the selected matrix item and all child items under it. Clear the **Set As Preferred Grid Template** box if you do not want to set this template as the preferred grid template.

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

   **Note:** You can only assign a preferred grid template to inventory matrix items.

8. Click **Submit**. The bulk creation of grid matrix templates may take some time to process. You can monitor the processing status on the Grid Template Creation Log: Results page.

   **Note:** The system does not generate templates for parent matrix items that do not have the selected column attribute.

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### 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.

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

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

1. Go to Lists > Grid Order Entry > Grid Templates.
2. In the Grid Templates list, click the View link of the grid template that you want to copy.

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 Single Grid Matrix Templates.

5. Click Save.

Assigning Preferred Grid Templates

Setting a preferred grid template simplifies the process of assigning a grid template for each inventory matrix item. You can use the following methods to assign a preferred grid template:

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

**Note:** You can only assign a preferred grid template to inventory matrix items.

Assigning a Preferred Grid Template Using the Item Record

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

Guidelines for Assigning a Preferred Grid Template Using the Item Record

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

- Assigning a preferred grid template is optional for matrix items and subitems.
- If a parent matrix item has a preferred grid template, its existing matrix subitems inherit the same template.
- A new or existing matrix subitem can have a different preferred grid template from its parent matrix item.
- A new matrix subitem, which is created after assigning a preferred grid template to its parent matrix item, also inherits its parent's preferred grid template.
- If you delete a grid template assigned to an item record, the Preferred Grid Template field becomes blank.
- You can only assign a preferred grid template to inventory matrix items.

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

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

To assign a preferred grid template using the item record:

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

Assigning a Preferred Grid Template Using CSV Import

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

Guidelines for Assigning a Preferred Grid Template using CSV Import

- The same guidelines apply when assigning the preferred grid template using the item record or CSV Import. See Guidelines for Assigning a Preferred Grid Template Using the Item Record.
- The CSV file must only include inventory matrix items.
- The CSV file must contain valid grid template IDs in the Preferred Grid Template column.
- When creating a new parent matrix item, leave the Preferred Grid Template field blank.
- When updating an existing parent matrix item and the Preferred Grid Template column in the CSV file is blank, the item inherits its latest preferred grid template. If there is no template assigned to the item, the field becomes blank.
- When creating a new matrix subitem and the Preferred Grid Template column in the CSV file is blank, the item inherits its parent's preferred grid template. If there is no preferred grid template set for its parent, the field becomes blank.
- You can only assign a preferred grid template to inventory matrix items.

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

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

To assign a preferred grid template using CSV import:

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

Note: The file must include the Preferred Grid Template column with valid grid template IDs. To view valid grid templates, go to List > Grid Order Entry > Grid Templates. Use the internal ID that corresponds to the grid template. To view the internal IDs, the Show Internal ID preference must be enabled. For more information, see the help topic Enabling the Show Internal IDs Preference.

2. Go to Setup > Import/Export > Import CSV Records.
3. In the Scan & Upload CSV File step, do the following:
   a. In the Import Type field, select Items.
   b. In the Record Type field, select Inventory Item.
   c. Click Browse to locate and select your CSV file.
   d. Click Next.
4. In the Import Options step, do the following:
   a. In the Data Handling field, select from the following options:
      - Add – Select this option to import new data.
Setting Up Grid Templates

- **Update** – Select this option to update existing data.
- **Add or Update** – Select this option to add new or update existing data.

b. To display additional settings, expand **Advanced Options**.

c. If you upload a CSV Import file that contains blank fields, you can check the **Overwrite Missing Fields** box. This action clears the value in the NetSuite fields mapped to the fields in the CSV file.

d. To enable the data validations in the CSV file, check the **Run Server SuiteScript and Trigger Workflows** box.

e. Click **Next**.

5. In the Field Mapping step, verify that the fields in the CSV file are mapped to the correct NetSuite fields and click **Next**.

6. In the Save Mapping & Start Import step, click **Run**.

7. To view the status of the import, click the **Import Job Status** link.

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

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

Setting Up Grid Item Templates

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

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

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

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

Setting Up Grid Attributes

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

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

Creating Grid Attributes

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

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

   Alternatively, go to Lists > Grid Order Entry > Define Grid Attribute and click New Grid Attribute.

2. On the Grid Attribute page, enter a name for the attribute.

3. Click Save.

   The new grid attribute record is created.

Editing Grid Attributes

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

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

To edit a grid attribute:

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

2. On the Grid Attribute List page, click the Edit link of the grid attribute you want to modify.

   Alternatively, click Edit if you are already viewing the specific Grid Attribute page.

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

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

4. Click Save.

Setting Up Grid Attribute Values

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

Creating Grid Attribute Values

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

To create a grid attribute value:
1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click the Edit link of a grid attribute.
3. On the Grid Attribute page, click the Create New icon and select New Grid Attribute - Value.
4. On the Grid Attribute - Value page, enter a name for the attribute value.
5. Click Save.
   The new grid attribute value is created.

   Note: Duplicate grid attribute values are not allowed.

Editing Grid Attribute Values

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

To edit a grid attribute:
1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click the Edit link of the grid attribute that contains the grid attribute value you want to modify.
   Alternatively, click Edit if you are already viewing the specific Grid Attribute – Value page.
3. On the Edit Grid Attribute – Value page, you can do any of the following:
   - In the Value field, you can change the grid attribute value.
   - To delete the grid attribute value record, select Delete from the Actions list.
4. Click Save.

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

Applying Grid Attributes to Items

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

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

Guidelines for Applying Grid Attributes to Items

Read the following guidelines for applying grid attributes to items:

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

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

Applying a Grid Attribute to an Item

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

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

To apply a grid attribute to an item:

1. Go to Lists > Accounting > Items.
2. In the Items list, click the link for the item to be mapped.
3. On the Item page, click the **Grid Attribute** subtab.
   - The attributes mapped to the item are shown in the list.
4. Click **New Apply Attribute**.
5. On the Apply Attribute page, select a grid attribute and attribute-value.

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

6. Click Save.

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

   If you need to change or delete a mapping, you can do the following on the Grid Attribute subtab:
   a. Click the Edit link of the attribute to be updated. On the Apply Attribute page, select another attribute or attribute-value.
   b. If an item has not been assigned to a grid template, you can delete the grid attribute value applied to it. To remove the mapping, select Delete from the Actions list.
      To see the list of mappings, click the List link. On the Apply Attribute List page, the grid attribute, attribute-value, and item mappings are shown.
   c. Save your changes to the record.

Applying Multiple Grid Attributes to Items

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

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

To apply multiple grid attributes to items:

1. Go to Lists > Grid Order Entry > Apply Attribute to Item.
2. To select grid attributes, click the double arrows beside the Grid Attributes pane.
3. In the Choose Grid Attribute popup list, select the grid attributes from the left pane.
   The grid attributes that you select are shown in the right pane. To remove an attribute from the Current Selections list, click its x icon.
   If there are too many attributes on the left pane, use the Search field to narrow down the list. For example, the following screenshot shows only the attributes with the word “size” in their name.

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

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

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

Using Grid Item Templates

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

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

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

Creating a Grid Item Template

Follow these instructions if you want to create a grid item template.

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 a grid template description of not more than 300 characters.
   d. In the Select Filter field, select the grid attributes you want to use as filters for the items

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 system uses the attributes to search for items that are mapped to them. The names of the attribute values are shown in the grid as column labels.

c. In the **Row Attribute** field, select the attribute you want to use as the category for the grid rows. When an attribute is selected, the associated attribute values are listed in the **Row Values** field.

d. In the **Row Values** field, select the attribute values for the grid rows. The system uses the attributes to search for items that are mapped to them. The names of the attribute values are shown in the grid as row labels.

**Note:** Select column and row attributes from 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 filters.

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

5. Select the transactions where you want the grid template to be available.
   This enables you to open the Grid Order Entry form on the selected transactions.

6. Click **Get Item**.
   The retrieved items are shown in the grid with the following limitations:
   - The row and column attribute values are arranged in alphabetical order by default. You can rearrange the columns by drag and drop.
   - Where multiple items are mapped to a cell, you can select the item you want from the dropdown list. You can also select a blank value.
   - A maximum of 200 values as grid attributes can be saved in the grid template. For more information, see Setting Up Grid Templates.
   - Same items in multiple cells are not allowed.
   - Item records that have been assigned to a grid template cannot be deleted.

7. In the grid, enter the percentage of the total order quantity for each attribute value in the column and row heading.
   As you enter a percentage, the **Row** and **Column Percentage** fields display the total percentage. The computed total should be equal to 100 percent. The percentages defined on the item template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.
   If multiple items are retrieved for the attributes you selected, click the item in the grid cell to view the other options, and then select the item you want.
8. Click **Save**.
   Clicking **New** clears the fields and displays a blank form.

**Editing a Grid Item Template**

Follow these instructions if you want to edit a grid item template.

**To edit a grid item template:**

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Templates list, click the Edit link of the grid item template you want to update.
3. Edit the grid item template as needed. You can update the **Name**, **Description**, **Available In**, and **Percent** fields.
4. Click **Save**.

**Deleting a Grid Item Template**

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

**Note:** Users with the Sales Person role cannot delete grid item templates. For more information, see Roles and Permissions for Grid Order Management.

Follow these instructions if you want to delete a grid item template.

**To delete a grid item template:**

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Templates list, click the Edit or View link of the grid item template you want to delete.
3. Click **Delete**.

**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, read the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

**Guidelines for Creating Grid Orders**

Read the following guidelines for creating grid orders:

- For better performance, add a maximum of 500 line items per transaction. You may encounter errors or slow processing when there are more than 500 line items in the transaction.
- Grid order entry does not include validation or autopopulation of values in standard mandatory fields, such as the Tax Code. This applies on the sales order form and custom mandatory fields for other SuiteApps.
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- 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 without a 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.

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

To enter a grid order:

1. Go to Transactions > (Transaction type).
   Follow the standard path for creating the transaction. For example, to create a sales order, go to Transactions > Sales > Enter Sales Orders.

2. On the order page, enter values in the Primary Information and Classification sections as you would in a standard order transaction. On the order page, you can also enter values in the Sales Information section.
   For instructions on creating each of the order transactions, read the following topics:
   - Creating Sales Orders
   - Entering a Purchase Order
   - Entering a Transfer Order
   - Adjusting Inventory
   - Preparing an Estimate

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3. Click the **Items** subtab, and then click **Open Grid**.

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

**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 may not be shown due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

Based on your selected template, the **Type** and **Grid Attribute** fields are populated.

**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 shown. To assign an order priority to a transaction item, replace the default value in the **Order Priority** field.

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

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

b. Click **Calculate**.

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

c. In the grid, click a cell to review information for that item.

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

d. Review and specify rates.

---

**Sales Orders:**

For sales orders, the **Price Level** field on the Grid Order Entry form and the **Price Level** column in the Items sublist are available if the Multiple Pricing feature is enabled in your NetSuite account.

By default, the **Edit Rate** box or **Edit Rate and Price Level** box is not checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Price Level** and **Rate** columns in the Items sublist (customer item pricing, group pricing, and customer pricing):

- In accounts with the Multiple Pricing feature enabled, the **Estimated Rate** field shows the item price based on the selected price level:
  
  \[
  \text{Price} = \text{Item Price Level starting from Base Price down to the Last Price Level (whichever has the first value)}
  \]

- In accounts without the Multiple Pricing feature:
  
  \[
  \text{Price} = \text{Item.Base Price field (baseprice)}
  \]

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:

\[
\text{Price} = \text{Item.Purchase Price field (cost)}
\]
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 Estimate Rate field becomes available for editing. The system then uses the value in the Estimated Rate field to populate the rate values in the Items sublist.

To override the estimated rate:

Check the Edit Rate box and enter a rate in the Estimated Rate field.

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 in 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 Using Grid Item Templates.

6. Click Submit to enter the grid order and return to the order transaction.
   □ Click Submit & New if you want to save the grid order and then enter another one.
   □ Click Submit & Save to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.

7. Verify the line items on the Items subtab of the Order Transaction page and click Save.

Guidelines for Editing Grid Items on the Order Transaction Page

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

■ Changing the percentage in the Quantity field of a line item overrides the percentages defined in the grid template.

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

Entering Multi-Grid Orders

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

Read the following guidelines for entering multi-grid orders:

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

Follow these instructions for entering multi-grid orders.

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

**To enter multi-grid orders:**

1. Go to Transactions > Sales > Enter Sales Orders.
2. On the Sales Order page, enter the details in the following sections: Primary Information, Sales Information, Classification. Specify the details as you would in a standard sales order transaction.
   - For detailed instructions, see the help topic Creating Sales Orders.
3. On the Items subtab, click Open Grid.
4. On the Grid Order Entry popup form, enter or select the values in the following sections: Grid Order Information and Order Details.
   - For detailed instructions, see steps 4 and 5 of Entering Single Grid Orders.
5. After entering the quantity of your orders in the grid template, click Add to Order. Your order is entered in the Order Summary table.
6. To enter orders in another template, select the grid template from the list in the Name field. Every time you change the template selection, the grid cells are cleared. For each grid template that you use, you must enter the orders in the Order Summary by clicking Add to Order.
7. Click Submit to enter your grid orders and return to the sales order.
   - On the Sales Order page, you can review the items from the grid on the Items subtab. You can update the details for specific items or add more items to the transaction.
8. After completing the sales order, click Save.
Creating Grid Orders

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:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.</td>
<td>Line number of the row item option</td>
</tr>
<tr>
<td>Template</td>
<td>Name of the grid template where you entered the order for the item option</td>
</tr>
<tr>
<td>Item Options</td>
<td>Row item option listed in the Matrix Item Options column of the grid template</td>
</tr>
<tr>
<td>Quantity per Row</td>
<td>Subtotal quantity of your order per row item option</td>
</tr>
<tr>
<td>Estimated Price per Row</td>
<td>Estimated subtotal price of your order per row item option</td>
</tr>
</tbody>
</table>

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

Updating Multi-Grid Orders

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

In the Order Summary table, the edit and delete icons for each item option are located in their respective columns.
To edit a row item option, click its corresponding pencil icon in the **Edit** column. When you edit a row item option, the complete order is shown in the grid in Edit mode. Before editing a row item, ensure that there are no entries in the grid that have not been added to the Order Summary table. All grid cells are cleared and replaced with values from the complete order.

- Update the quantity of the row item, including other items in the order. If you change the value of a grid cell to 0 or leave it blank, the corresponding items in the Order Summary are deleted when you enter the updates.
- To enter your updates in the Order Summary, click **Add to Order**.

To delete a row item option, click its corresponding delete icon in the **Delete** column. The system displays a confirmation message. When you delete a row item option, the complete order is shown in the grid. In case you deleted the row item option by mistake, you can add it again to the Order Summary table.

- To delete the selected row item only, click **Delete Row**.
- To delete all rows that belong to the selected template, click **Delete Template**.

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

### Editing Grid Orders

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

#### Guidelines for Editing Grid Orders

Read the following guidelines for editing grid orders:

- Grid inventory adjustments cannot be edited.
- Changes to a grid template do not automatically reflect in the grid orders where the template is used. To update a grid order, you either manually edit it and reload the grid template, or manually enter the changes in the line items.
- Users that do not have grid access cannot edit items that have been added through grid orders. When they edit other items and details on the transaction, the grid item details are retained.
- The Order Summary table is not shown on the Grid Order Entry form in Edit mode.
- When you create sales orders from estimates with grid orders, the grid order is carried over. You can edit the item quantities in the grid of the sales order. When you convert estimates to transactions not supported by grid ordering, you can edit the order in the item sublist of transactions. For the list of transactions supported by grid order entry, refer to the table on Grid Order Management.

To view other guidelines for grid order entry, see Creating Grid Orders. To view specific guidelines when updating multi-grid orders, see Updating Multi-Grid Orders.
Follow these instructions for editing grid orders.

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

### 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 of the specific order.

3. On the **Items** subtab of the order page, perform any of the following:
   - To enter a new grid order, click **Open Grid**.
     
     For instructions, read the following topics:
     
     □ [Entering Single Grid Orders](#)
     
     □ [Entering Multi-Grid Orders](#)
   - 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.
   - 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**.

For more information about grid preferences, see [Setting Grid Order Management Preferences](#).

4. Click **Submit**.
   
   □ Click **Submit & New** if you want to save the grid order and then enter another grid order.
   
   □ Click **Submit & Save** to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.
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, read the following topics:

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

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

## Grid Printing Options

The following options are available for grid printing:

- **Standard Grid Order Printing**
- **Grid Print Templates**

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 **General Personal 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 shown in the main item table.

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

## Standard Grid Order Printing

You can use the standard grid order printing to print the following transaction records:

- Purchase Order
- Sales Order
- Transfer Order

### Guidelines for Using Standard Grid Order Printing

Read the following guidelines for 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 shown in a separate table to prevent overlapping of text when too many columns are shown 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 shown only on supported transactions.

Grid Print Templates

You can use grid print templates to print the following transaction records:

- Cash Sale
- Invoice
- Packing Slip

**Note:** You can only use packing slips for item fulfillments created from sales order and transfer order transactions.

- Picking Ticket
- Purchase Order
- Quote
- Sales Order

Guidelines for Using Grid Print Templates

Read the following guidelines for using grid print templates:

- Grid print templates must be assigned to the specific transaction records in the grid printing preferences. For more information, see Setting Grid Order Management Preferences.
- Matrix items must be set up in grid matrix templates. For more information, see Setting Up Grid Matrix 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 may occur when you have too many attributes to show in the grid printout.
- Blank rates in transaction line items are shown with a value of zero in the grid.
- The total value in the grid table is calculated based on the 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. If there are different rates for the same item in the sublist, only the rate of the last entered line item is shown 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.

- When printing, if there is no preferred grid template set for a parent matrix item, the system uses the oldest template created for the item. Otherwise, if there is a preferred grid template set for a matrix item, the system uses the preferred grid template for printing.

Customizing Grid Print Templates

Read the following sections to learn more about customizing the grid print template for selected transaction records:

- Customizing Grid Print Templates for Purchase Order and Sales Order Transactions
## Customizing Grid Print Templates for Other Transactions

You can choose to customize how the grid appears when printing selected transaction records. You can create custom templates based on standard grid print templates available in your account.

On the **Grid Printing** subtab of the Grid Preferences page, the standard grid print templates are selected by default. Before you can assign a custom template from the dropdown list, you must first upload the custom grid print template in the Templates > Grid Printing Templates folder in the NetSuite File Cabinet.

An administrator or developer with knowledge of FreeMarker and JSON can customize templates based on standard grid print templates.

The following table shows the recommended steps and procedures in customizing the grid print templates for selected transaction records.

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Procedure</th>
</tr>
</thead>
</table>
| 1. Download the standard grid print template from the File Cabinet. | **To download the standard grid print template:**  
  1. Go to Documents > Files > File Cabinet.  
  2. Go to the SuiteBundles > Bundle 41296 > src > template > GridPrinting folder.  
  3. Click the **Download** link beside the grid print template that you want to customize:  
    - `wd_gom_template_csgridprintout.xml` — for cash sale  
    - `wd_gom_template_ivgridprintout.xml` — for invoice  
    - `wd_gom_template_pogridprintout.xml` — for purchase order  
    - `wd_gom_template_psgridprintout.xml` — for packing slip  
    - `wd_gom_template_ptgridprintout.xml` — for picking ticket  
    - `wd_gom_template_qtgridprintout.xml` — for quote  
    - `wd_gom_template_sogridprintout.xml` — for sales order |
| 2. Edit the file and save as a new custom grid print template. | For information on editing the grid print template for selected transactions, read the following topics:  
  - Customizing Grid Print Templates for Purchase Order and Sales Order Transactions  
  - Customizing Grid Print Templates for Other Transactions |
| 3. Upload the custom grid print template to the File Cabinet. | **To upload the custom grid print template:**  
  1. Go to Documents > Files > File Cabinet.  
  2. Go to the Templates > Grid Printing Templates folder.  
  3. Click **Add File** and select the custom grid print template file from your computer. |
| 4. Modify the grid printing preferences in the Grid Preferences page. | **To modify the grid printing preferences:**  
  1. Go to Lists > Grid Order Entry > Set Grid Preferences.  
  2. On the **Grid Printing** subtab, select the custom grid print template you created for the transaction.  
  3. Click **Save**.  
  For more information, see Setting Grid Printing Preferences. |
Customizing Grid Print Templates for Purchase Order and Sales Order Transactions

This section provides information about customizing the grid print template for the following transactions:

- Purchase Order
- Sales Order

Referenced Records for Purchase Order and Sales Order Transactions

The following records are used as references in grid print templates for purchase order and sales order transactions.

<table>
<thead>
<tr>
<th>Record</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>record</td>
<td>Transaction record</td>
</tr>
<tr>
<td>parameters</td>
<td>Contains the following:</td>
</tr>
<tr>
<td></td>
<td>- barcode — returns true if the Barcoding and Item Labels feature is enabled</td>
</tr>
<tr>
<td></td>
<td>- multiunitofmeasure — returns true if the Multiple Units of Measure feature is enabled</td>
</tr>
<tr>
<td></td>
<td>- itemoptions — returns true if the Item Options feature is enabled</td>
</tr>
<tr>
<td>subsidiaryRec</td>
<td>Subsidiary of the transaction</td>
</tr>
<tr>
<td>employeeSubsidiaryRec</td>
<td>Subsidiary of the logged in user</td>
</tr>
<tr>
<td>companyInformation</td>
<td>Contains information from the company information record</td>
</tr>
</tbody>
</table>

Sample 2x2 Grid Printout for Purchase Order and Sales Order Transactions

This image displays a sample 2x2 grid printout for purchase order and sales order transactions.
Sample JSON Code Snippet for a 2x2 Grid Printout for Purchase Order and Sales Order Transactions

The following JSON code snippet represents the 2x2 grid printout sample for purchase order and sales order transactions. The code snippet is found in the `record.custbody_gridoe_productgrpdata` field in the template.

```json
[
  {
    "type": "MI",
    "nameId": "4",
    "name": "Basic Crew Neck Tee"
  },
  {
    "type": "MI",
    "nameId": "5",
    "name": "Other Shirt Option"
  },
]
```
Sample Conversion of JSON Format to a 2x2 Grid for Purchase Order and Sales Order Transactions

The following table shows the conversion of the sample JSON code to the 2x2 grid printout sample for purchase order and sales order transactions.

<table>
<thead>
<tr>
<th>Matrix Item Option</th>
<th>Small</th>
<th>Medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>(record.custbody_gridoe_productgrpddata[0].grid.rowcollabel)</td>
<td>(record.custbody_gridoe_productgrpddata[0].grid.header[0].name)</td>
<td>(record.custbody_gridoe_productgrpddata[0].grid.header[1].name)</td>
</tr>
<tr>
<td>Blue</td>
<td>Row 1 Col 1 Item ID: (record.custbody_gridoe_productgrpddata[0].grid.data[0].rowattribute)</td>
<td>Row 1 Col 2 Item ID: (record.custbody_gridoe_productgrpddata[0].grid.data[0].Column1)</td>
</tr>
<tr>
<td>Red</td>
<td>Row 2 Col 1 Item ID: (record.custbody_gridoe_productgrpddata[0].grid.data[1].rowattribute)</td>
<td>Row 2 Col 2 Item ID: (record.custbody_gridoe_productgrpddata[0].grid.data[1].Column1)</td>
</tr>
</tbody>
</table>

Important considerations in representing the record.custbody_gridoe_productgrpddata field to a grid:

- The index of the grid in record.custbody_gridoe_productgrpddata is the same as the item's grid id column in the item sublist.
- It is possible to have an empty record.custbody_gridoe_productgrpddata field.
- It is possible to have an empty {} entry member in record.custbody_gridoe_productgrpddata. This means that the whole template and its items are deleted in the item sublist.

Sample FreeMarker Code Snippet for a 2x2 Grid Printout for Purchase Order and Sales Order Transactions

The following FreeMarker code snippet represents the 2x2 grid printout example for purchase order and sales order transactions.

```freemarker
<#--- UTILITY FUNCTIONS -->
<#function parseJSON json>
    <#local null = 'null'> <#-- null is not a keyword in FTL -->
    <#return json?eval>
</#function>

<#--- PREP ITEM DATA FOR GRID-->
<#assign itemdetails = {}>
<#list record.item as item>
    <#assign itemdetails = itemdetails + { "${item.olditemid}" : {"rate": item.origrate, "quantity": item.quantity} }>
</#list>

<#--- START GRID----->
<#assign gridfield = "\"grids\": ${record.custbody_gridoe_productgrpddata} }">
<#assign gridjson = parseJSON(gridfield)>
<#assign counter = 0>
<#list gridjson.grids as gridData>
    <table width="100%" id="gomp_templateid_1" class="grid_title_table">
        <tr>
            <td id="gomp_lbl_templateid" class="gridtemplate_label">Grid ID</td>
        </tr>
```
Grid Order Management
Read the following guidelines in writing the FreeMarker code for the grid print template for purchase order and sales order transactions:

- 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.

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

Customizing Grid Print Templates for Other Transactions

This section provides information about customizing the grid print template for the following transactions:

- Cash Sale
- Invoice
- Packing Slip
- Picking Ticket
- Quote

Referenced Records for Other Transactions

The following records are used as references in grid print templates for cash sale, invoice, packing slip, picking ticket, and quote.

<table>
<thead>
<tr>
<th>Record</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>record</td>
<td>Transaction record</td>
</tr>
<tr>
<td>companyInformation</td>
<td>Contains information from the company information record</td>
</tr>
<tr>
<td>salesorder</td>
<td>Information in the packing slip that corresponds to the sales order or transfer order transaction in the current item fulfillment</td>
</tr>
<tr>
<td>{FTLUtil}</td>
<td>Contains the codes in <code>WD_GridOE_TemplateUtils.xml</code> in the SuiteBundles &gt; Bundle 41296 &gt; src &gt; GridPrinting folder</td>
</tr>
<tr>
<td>{cssContent}</td>
<td>Contains the codes in <code>WD_GridOE_GridPrintOut.css</code> in the SuiteBundles &gt; Bundle 41296 &gt; src &gt; GridPrinting folder</td>
</tr>
</tbody>
</table>

You can use the following FreeMarker functions in the custom grid print templates for cash sale, invoice, packing slip, picking ticket, and quote. These functions are also used in the `WD_GridOE_TemplateUtils.xml` in the SuiteBundles > Bundle 41296 > src > GridPrinting folder.

<table>
<thead>
<tr>
<th>FreeMarker Function</th>
<th>Parameters</th>
<th>Description</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>parseJSON(json)</td>
<td>json — JSON string to be parsed</td>
<td>This function parses JSON String to JSON Object.</td>
<td>FTL:</td>
</tr>
<tr>
<td>FreeMarker Function</td>
<td>Parameters</td>
<td>Description</td>
<td>Sample</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| `min(val1, val2)`             | `val1, val2` — numeric values to be compared | This function returns the lower value between parameters `val1` `val2`. | FTL: `<#assign test = min(1,9)> {test}`  
Output: 9 |
### FreeMarker Function

<table>
<thead>
<tr>
<th>Function</th>
<th>Parameters</th>
<th>Description</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>getRowColumnData</strong>&lt;br&gt;row, col, subcolumn</td>
<td>row — accepts gridData.grid.data element&lt;br&gt;col — accepts gridData.grid.data.columnids element&lt;br&gt;subcolumn — accepts subcolumns (Rate, Qty)</td>
<td>This function must be called inside the loop for gridData.grid.data where the rows and columns are traversed. This function also gets the corresponding subcolumn data for the current row and column of the loop from itemDetails. When subcolumn is Picked, the output returns blank. When subcolumn is Rate, the output formats to currency 0.00.</td>
<td>itemDetails:&lt;br&gt;{10: {rate: 100, quantity: 999}}&lt;br&gt;FTL:&lt;br&gt;{getRowColumnData(row, col, rate)}&lt;br&gt;{getRowColumnData(row, col, quantity)}&lt;br&gt;{getRowColumnData(row, col, picked)}&lt;br&gt;Output:&lt;br&gt;100.00&lt;br&gt;999&lt;br&gt;''</td>
</tr>
<tr>
<td><strong>getRowTotal</strong>&lt;br&gt;row, subcolumn</td>
<td>row — accepts gridData.grid.data element&lt;br&gt;subcolumn — accepts subcolumns (Rate, Qty..)</td>
<td>This function must be called inside the loop for gridData.grid.data where the rows are traversed. This function also gets the corresponding subcolumn total for the current row of the loop from itemDetails.</td>
<td>gridData.grid.data:&lt;br&gt;{column01:{ internalid: 10}, column02:&lt;br&gt;{ internalid: 20}}&lt;br&gt;itemDetails:&lt;br&gt;{10: {rate: 100, quantity: 999}, 20: {rate: 100, quantity: 1}}&lt;br&gt;FTL:&lt;br&gt;{getRowTotal(row, rate)}&lt;br&gt;{getRowTotal(row, quantity)}&lt;br&gt;Output:&lt;br&gt;200&lt;br&gt;1000</td>
</tr>
<tr>
<td><strong>getColumnTotal</strong>&lt;br&gt;rows, column, subcolumn</td>
<td>row — accepts gridData.grid.data&lt;br&gt;column — accepts gridData.grid.data.columnids element&lt;br&gt;subcolumn — accepts subcolumn (Rate, Qty..)</td>
<td>This function must be called inside the loop for gridData.grid.data where the columns are traversed. This function also gets the corresponding subcolumn total for the current column of the loop from itemDetails.</td>
<td>gridData[0].grid.data::&lt;br&gt;{column01:{ internalid: 10}}&lt;br&gt;gridData[1].grid.data::&lt;br&gt;{column01:{ internalid: 20}}&lt;br&gt;itemDetails:&lt;br&gt;{10: {rate: 100, quantity: 999}, 20: {rate: 100, quantity: 1}}&lt;br&gt;FTL:</td>
</tr>
</tbody>
</table>
### FreeMarker Function Parameters Description Sample

<table>
<thead>
<tr>
<th>Function</th>
<th>Parameters</th>
<th>Description</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>{getColumnTotal(rows, col, rate)}</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| {getColumnTotal(rows, col, quantity)} | | | Output:
| | | 200 |
| | | 1000 |

**Note:** Grid details in the transaction can be acquired from the field `record.record.custbody_gridoe_trantemplatedata`. The field contains a string in JSON code.

### Sample 2x2 Grid Printout for Other Transactions

This image displays a sample 2x2 grid printout for cash sale, invoice, packing slip, picking ticket, and quote.

### Sample JSON Code Snippet for a 2x2 Grid Printout for Other Transactions

The following JSON code snippet represents the 2x2 grid printout sample for cash sale, invoice, packing slip, picking ticket, and quote. The code snippet is found in the `record.record.custbody_gridoe_trantemplatedata` field in the template.

```json
{
    "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": [
```
Sample Conversion of JSON Format to a 2x2 Grid for Other Transactions

The following table shows the conversion of the sample JSON code to the 2x2 grid printout sample for cash sale, invoice, packing slip, picking ticket, and quote.

<table>
<thead>
<tr>
<th>Matrix Item Option</th>
<th>Small</th>
<th>Medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>(record.custbody_gridoe_trantemplatedata[0].grid.rowcollabel)</td>
<td>(record.custbody_gridoe_trantemplatedata[0].grid.header[0].name)</td>
<td>(record.custbody_gridoe_trantemplatedata[0].grid.header[1].name)</td>
</tr>
<tr>
<td>Blue (record.custbody_gridoe_trantemplatedata[0].grid.data[0].rowattribute)</td>
<td>Row 1 Col 1 Item ID: (record.custbody_gridoe_trantemplatedata[0].grid.data[0].Column1)</td>
<td>Row 1 Col 2 Item ID: (record.custbody_gridoe_trantemplatedata[0].grid.data[0].Column2)</td>
</tr>
<tr>
<td>Red (record.custbody_gridoe_trantemplatedata[0].grid.data[1].rowattribute)</td>
<td>Row 2 Col 1 Item ID: (record.custbody_gridoe_trantemplatedata[0].grid.data[1].Column1)</td>
<td>Row 2 Col 2 Item ID: (record.custbody_gridoe_trantemplatedata[0].grid.data[1].Column2)</td>
</tr>
</tbody>
</table>

Important considerations in representing the `record.custbody_gridoe_trantemplatedata` field to a grid:

- The index of the grid in `record.custbody_gridoe_trantemplatedata` is the same as the item's grid id column in item sublist.
- It is possible to have empty `record.custbody_gridoe_trantemplatedata` field.
- It is possible to have empty `{}` entry member in `record.custbody_gridoe_trantemplatedata`. This means that the whole template and its items are deleted in item sublist.
Sample FreeMarker Code Snippet for a 2x2 Grid Printout for Other Transactions

The following FreeMarker code snippet represents the 2x2 grid printout example for cash sale, invoice, packing slip, picking ticket, and quote.

```freemarker
<#assign itemdetails = getItemDetails(record.item)>
<#assign gridlist = record.custbody_gridoe_trantemplatedata>
<#list gridlist?eval as i, gridData>
  <#if gridData?has_content>
    <#assign subcolumns = ["Order": "Order", "id": "quantity"], ["Picked": "Picked", "id": "picked"]>
    <#assign maxcol = 4>
    <#assign totalcol = gridData.grid.header?size>
    <#assign tablecount = ((totalcol+1)/maxcol)?ceiling>
    <span class="grid_templatename" id="gomp_templateid_${gridData.nameId}_${tablenum}"
  ${gridData.item}
  <#list 1..tablecount as tablenum>
    <#assign startColumn = (tablenum-1) * (maxcol)>
    <#assign lastColumn = min(startColumn + maxcol-1, totalcol-1)>
    <table class="grid_table" id="grid_table${gridData.nameId}_${tablenum}"
      <tr>
        <!-- Attributes Column -->
        <#if startColumn <= lastColumn>
          <#list gridData.grid.header[startColumn..lastColumn] as column>
            <th colspan="${subcolumns?size}" width="100px" id="gomp_inf_th_colatt_${column.colAttr}">${column.name}</th>
          </#list>
        </#if>
        <!-- TOTAL Column -->
        <#if tablenum == tablecount>
          <#list subcolumns as subcolumn>
            <th width="70px" id="gomp_lbl_th_total${subcolumn.label}">${subcolumn.label}</th>
          </#list>
        </#if>
      </tr>
      <tr id="gomp_lbl_tr_subcolumns">
        <!-- Subcolumns for Attribute Columns -->
        <#list gridData.grid.header[startColumn..lastColumn] as column>
          <#list subcolumns as subcolumn>
            <th width="70px" id="gomp_lbl_th_${subcolumn.label}">${subcolumn.label}</th>
          </#list>
        </#if>
      </tr>
      </thead>
      </table>
  </#if>
</#list>
</#assign>
</#assign>
```
Read the following guidelines in writing the FreeMarker code for the grid print template for other transactions:

- Convert `null` to `string "null"` when evaluating `record.custbody_gridoe_trantemplatedata`. This is due to FreeMarker's inability to recognize `null` values. See the sample's `parseJson` function.
- The field `record.custbody_gridoe_trantemplatedata` does not contain details about the item in the grid. Added information about the item must be gathered from the item sublist in transaction record. See `record.item` in the code snippet.
- It is mandatory to call and assign the function `getItemDetails` or `getItemOrderedShippedQty` before calling other functions as they are dependent on the item details JSON data.
- The CSS may be overwritten by replacing or adding to the `{cssContent}` inside the style tag.

**Customizing Advanced Grid Print Templates**

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

- Cash Sale
- Invoice
- Packing Slip
- Picking Ticket
After creating custom grid print templates, you must store them in the NetSuite File Cabinet. For more information, read the following topics:

- Grid Print Templates
- Customizing Advanced PDF/HTML Templates for Grid Printing
- Uploading Customized Grid Printing Templates

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

### Customizing Advanced PDF/HTML Templates for Grid Printing

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

**Note:** To update advanced PDF/HTML templates, you must have sufficient CSS and HTML knowledge. For more information, see the help topic Source Code 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:
   - Insert `{cssContent}` within the `<style> </style>` tags. This record is used for formatting the grid.
   - Insert `{FTLUtil}` before the `<head> </head>` tags. This record contains FreeMarker functions to manipulate the grid data.
5. Click **Save**.
6. 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.
7. Create an XML file and copy all the contents of the advanced print template into this file.

### Uploading Customized Grid Printing Templates

Follow these steps to upload your customized grid printing templates in the NetSuite 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, go to the Templates > Grid Printing Templates folder.
3. Click **Add File**.
4. On the File Upload popup window, select your custom XML file, and then click **Open** to add the file to the folder.
After storing your custom grid print templates in the File Cabinet, the templates become available in the dropdown list on the Grid Print subtab of the Grid Preferences page. To assign grid print templates to transactions, see Setting Grid Order Management Preferences.

**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.

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

**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** button does not appear 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 Grid Print Templates.

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

**Guidelines for Bulk Grid Printing**

Read the following guidelines for bulk grid printing:

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

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

**To print transactions in bulk:**

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date From / Date To</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Use Date From without Date To, if you want to retrieve all documents based on or later than the start date.</td>
</tr>
<tr>
<td></td>
<td>Use Date To without Date From, if you want to retrieve all documents based on or earlier than the end date.</td>
</tr>
<tr>
<td>Location</td>
<td>Select the location of the documents you want to retrieve. Only locations in the transaction header are available for selection.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Filtering by location is not applicable to packing slips.</td>
</tr>
<tr>
<td></td>
<td>Selecting <strong>All</strong> retrieves documents across all locations and includes those without location settings in the transaction header.</td>
</tr>
<tr>
<td></td>
<td>Selecting <strong>None</strong> retrieves only documents without location settings in the transaction header.</td>
</tr>
<tr>
<td>Allow Reprinting</td>
<td>Check the box to retrieve documents that have been previously printed. Otherwise, these documents are not included in your search results.</td>
</tr>
</tbody>
</table>

**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

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

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

Viewing Bulk Grid Printing Logs

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

**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 shown.

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td>Select the form or transaction type of the files associated with the logs.</td>
</tr>
<tr>
<td>Status</td>
<td>Select the bulk grid printing status of the files associated with the logs.</td>
</tr>
<tr>
<td>Date From / Date To</td>
<td>Enter the start and end of the date range in their respective fields. The</td>
</tr>
<tr>
<td></td>
<td>date in the print timestamp is used to filter the bulk grid printing logs.</td>
</tr>
<tr>
<td></td>
<td>Use Date From without Date To, if you want to retrieve all records based on</td>
</tr>
<tr>
<td></td>
<td>or later than the start date.</td>
</tr>
<tr>
<td></td>
<td>Use Date To without Date From, if you want to retrieve all records based on</td>
</tr>
<tr>
<td></td>
<td>or earlier than the end date.</td>
</tr>
<tr>
<td>Printed By</td>
<td>For Administrators, you can click one or more users from the list to retrieve</td>
</tr>
<tr>
<td></td>
<td>all associated logs. Only users, both active and inactive, who have submitted</td>
</tr>
<tr>
<td></td>
<td>bulk grid printing requests are included in the list.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Non-administrators cannot use the Printed By filter. They can only</td>
</tr>
<tr>
<td></td>
<td>view the logs for PDF files printed by themselves.</td>
</tr>
</tbody>
</table>

**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 shown on the current page, click Delete All Logs & Files.

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

Viewing Grid Matrix Information

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

Guidelines for Viewing Grid Matrix Information

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

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

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 shown.

Updates to matrix item options are automatically reflected in the grid.

Changing the Item Column Display

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

Filtering Items by Location

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

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

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

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 Purchase Order and Sales Order Transactions

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

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

CSV Imports for Purchase Order and Sales Order Transactions

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

- Viewing the Grid for the Item Record
- Printing Transaction Records Using the Grid Template
Guidelines for Importing Purchase Order and Sales Order Transactions

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

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

**Grid Item ID Assignment**

When you use CSV Import for purchase order and sales order transactions, the item's **Grid Item ID** assignment depends on the following fields:

- **Item** – field in the CSV Import file
- **Grid Item ID** – field in the CSV Import file
- **Grid Template** – field in the CSV Import file
- **Available In** – field located in the Grid Matrix Template page
- **Preferred Grid Template** – field located on the **Custom** subtab of the Inventory Item page

The SuiteApp examines the row sequence of the **Item** field and its corresponding **Grid Template** in your CSV Import file. The row sequence of the **Item** field determines if they are the same items or different items. The row sequence of the **Grid Template** field determines if the items are grouped or ungrouped.

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

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

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Grid Template Grouping</th>
<th>Grid Template Applicable? (1)</th>
<th>Sample Item and Grid Template Input in the CSV Import File</th>
<th>Grid Item ID Assignment in the Transaction Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three same items with the same template</td>
<td>Grouped</td>
<td>Y</td>
<td>Item A, Grid Template N Item A, Grid Template N Item A, Grid Template N</td>
<td>Grid Item ID 1 Grid Item ID 2 Grid Item ID 3</td>
</tr>
<tr>
<td>Three different items with different templates</td>
<td>Ungrouped</td>
<td>Y</td>
<td>Item A, Grid Template N Item B, Grid Template O Item C, Grid Template P</td>
<td>Grid Item ID 1 Grid Item ID 2 Grid Item ID 3</td>
</tr>
<tr>
<td>Three different items with the same template</td>
<td>Grouped</td>
<td>Y</td>
<td>Item A, Grid Template N Item B, Grid Template N</td>
<td>Grid Item ID 1 Grid Item ID 1 Grid Item ID 1</td>
</tr>
</tbody>
</table>
## Scenarios

<table>
<thead>
<tr>
<th>Grid Template Grouping</th>
<th>Grid Template Applicable? (1)</th>
<th>Sample Item and Grid Template Input in the CSV Import File</th>
<th>Grid Item ID Assignment in the Transaction Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three different items with different templates</td>
<td>Ungrouped</td>
<td>Y</td>
<td>Item C, Grid Template N</td>
</tr>
<tr>
<td>■ Two different items with the same template</td>
<td></td>
<td></td>
<td>Item A, Grid Template N</td>
</tr>
<tr>
<td>■ One different item with a different template in between</td>
<td></td>
<td></td>
<td>Item C, Grid Template O</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Item B, Grid Template N</td>
</tr>
</tbody>
</table>

### Three different items with different templates

- Two different items with the same template
- One different item with a different template in between

### Three different items with the same template

- Two same items with the same template
- One different item with the same template

### Three different items with different templates

- Two different items with the same template
- One different item with no grid template in between

### Three different items with different templates

- Two different items with the same template
- One item with a grid template that is not applicable to the transaction in between

### Three different items with different templates

- Two different items with the same template

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Grid Template Grouping</th>
<th>Grid Template Applicable? (1)</th>
<th>Sample Item and Grid Template Input in the CSV Import File</th>
<th>Grid Item ID Assignment in the Transaction Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ungrouped</td>
<td>Y</td>
<td>Item A, Grid Template N</td>
<td>Grid Item ID 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Item C, Grid Template N</td>
<td>Grid Item ID 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Item B, Grid Template N</td>
<td>Grid Item ID 3</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Item C, Grid Template O</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Item B, Grid Template N</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Item C, Grid Template N</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Three different items with different templates

- Two different items with the same template

### Three different items with different templates

- Two different items with the same template

### Three different items with different templates

- Two different items with the same template

### Three different items with different templates

- Two different items with the same template

---

(1) Grid Template Applicable means that the **Preferred Grid Template** used includes the order transaction in the **Available In** field.

(2) Non-grid refers to an item that does not display in grid format.

## Grid Template Assignment

When you use CSV Import for purchase order and sales order transactions, the item's **Grid Template** assignment depends on the following fields:
- **Grid Item ID** – field in the CSV Import file
- **Grid Template** – field in the CSV Import file
- **Preferred Grid Template** – field in the item record’s Custom subtab

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

<table>
<thead>
<tr>
<th>Grid Item ID Input in the CSV Import File</th>
<th>Grid Template Input in the CSV Import File</th>
<th>Preferred Grid Template Input in the Item Record</th>
<th>Grid Template Assignment in the Transaction Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>Blank</td>
<td>With Value</td>
<td>Preferred Grid Template</td>
</tr>
<tr>
<td>Blank</td>
<td>With Value</td>
<td>Blank</td>
<td>Grid Template</td>
</tr>
<tr>
<td>Blank</td>
<td>Blank</td>
<td>With Value</td>
<td>Preferred Grid Template (non-grid)</td>
</tr>
<tr>
<td>With Value (1)</td>
<td>Blank</td>
<td>With Value</td>
<td>Preferred Grid Template</td>
</tr>
<tr>
<td>With Value (1)</td>
<td>With Value</td>
<td>Blank</td>
<td>Grid Template</td>
</tr>
<tr>
<td>With Value (1)</td>
<td>Blank</td>
<td>Blank</td>
<td>Preferred Grid Template (non-grid)</td>
</tr>
<tr>
<td>With Value (1)</td>
<td>With Value</td>
<td>With Value</td>
<td>Grid Template</td>
</tr>
</tbody>
</table>

(1) The system ignores any value given to the Grid Item ID in the CSV Import file.
(2) Non-grid refers to an item that does not display in grid format.

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

### Viewing the Grid for the Item Record

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

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

**To view the grid for the item record:**

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

### Printing Transaction Records Using the Grid Template

After importing purchase orders and sales orders using CSV Import, you can print the transaction using the grid template assignment.
Note: The navigation paths used in these instructions are based on the Administrator role. If you are not an administrator, you may see a different view of the NetSuite center. For more information, see Roles and Permissions for Grid Order Management.

To print the transaction record:

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

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

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