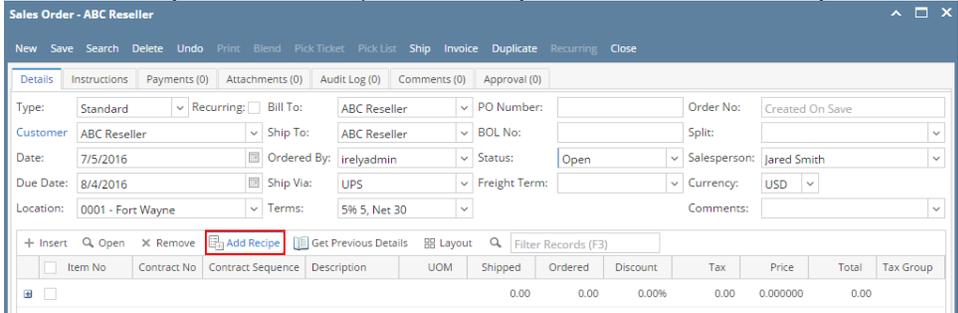


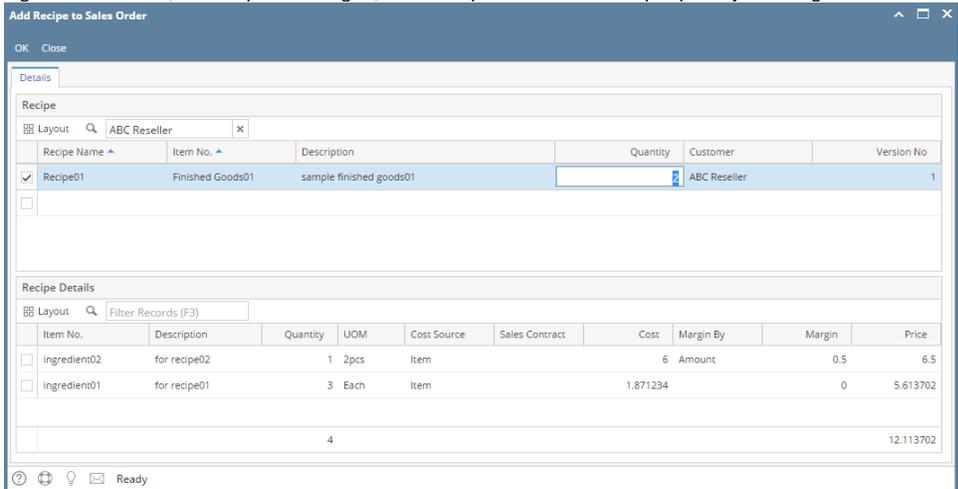
How to Add a Recipe with Customer specified to the Sales Order

The Add Recipe button on Sales Order and Invoice screen will allow the user to add the recipe ingredients. Recipes can be added through the Manufacturing | Recipes menu.

- Before you proceed with the succeeding steps, make sure the Recipe has been created. Make sure that Recipe created has customer specified.
- Open the **Sales | Sales Orders menu**. If there is no existing record yet, this will open a new Sales Order screen. If not, click the **New button** on the integrated search grid.
You will notice that some of the fields, like the **Type, Date, Due Date, Location, Ordered By, Status,** and **Currency** are already populated by default. You can still change these value if necessary.
- Fill out the header details as needed. The required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
 - Set **Type** to Standard.
 - Select the **Customer** to whom the order is from.
 - Select a different **Location, Bill To, Ship To, Terms,** and **Currency** if needed. But don't leave these fields blank.
 - Enter other details that you see necessary. Refer to [Sales Order | Field Description | Header Details](#) to help you in filling out the fields.
- Click the **Add Recipe button**. This will open the **Add Recipe to Sales Order screen** where you can select the recipe.



- Look for the recipe and enter a new ordered **Quantity** if necessary. This field get its default value from the Recipe | Recipe Quantity. Note that the ingredient's details, on Recipe Details grid, will also update when the recipe quantity is changed.



- Click **OK button** to add the ingredients to the sales transaction grid. Here is a sample sales order after adding above sample recipe.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Blend Pick Ticket Pick List Ship Invoice Duplicate Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (0) Comments (0) Approval (0)

Type: Standard Recurring: Bill To: ABC Reseller PO Number: Order No: Created On Save

Customer: ABC Reseller Ship To: ABC Reseller Ship No: BOL No: Split:

Date: 7/5/2016 Ordered By: irelyadmin Status: Open Salesperson: Jared Smith

Due Date: 8/4/2016 Ship Via: UPS Freight Term: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Comments:

+ Insert Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

| Item No | Contract No | Contract Sequence | Description | UOM | Shipped | Ordered | Discount | Tax | Price | Total | Tax Group |
|--------------------------|-------------|-------------------|---------------|--------------|---------|---------|----------|-------|-------|----------|-------------|
| <input type="checkbox"/> | | | ingredient... | for recipe02 | 2pcs | 0.00 | 1.00 | 0.00% | 0.00 | 6.500000 | 6.50 IN SST |
| <input type="checkbox"/> | | | ingredient... | for recipe01 | Each | 0.00 | 3.00 | 0.00% | 0.00 | 1.871234 | 5.61 IN SST |
| <input type="checkbox"/> | | | | | | 0.00 | 0.00 | 0.00% | 0.00 | 0.000000 | 0.00 |

Bill To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Item: ingredient02 - for recipe02

On Hand: 0.00 On Order (PO): 0.00

Committed: 0.00 Back Order: 0.00

Quote: Subtotal: 12.11

Shipping: 0.00

Tax: 0.00

Total: 12.11

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7. Save the record.

 You can skip saving the record if the transaction is to be duplicated or processed to inventory shipment or processed to Invoice right away since it will be saved automatically.

1. Before you proceed with the succeeding steps, make sure the [Recipe](#) has been created.
2. Open the transaction screen, e.g. Quote, Sales Order, Invoice, or Credit Memo, where you will add a recipe.
3. Fill out the necessary header details.
4. Click the **Add Recipe** button. This will open the **Add Recipe** screen where you can select the recipe.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Pick Ticket Ship Invoice Duplicate Customer Close

Details Instructions Payments (0) Attachments (0) Audit Log (0) Comments (0)

Type: Standard Recurring: Bill To: ABC Reseller Ordered By: irelyadmin Order No: Created On Save

Customer: ABC Reseller Ship To: ABC Reseller Ship No: BOL No: Split: Salesperson: Jared Smith Status: Open

Date: 04/22/2016 Due: 05/22/2016 Ship Via: UPS Freight Term: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Comments: Sample adding of recipe.

+ Insert Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

| Item No | Contract No | Contract Sequence | Description | UOM | Shipped | Ordered | Discount | Tax | Price | Total | Tax Group |
|--------------------------|-------------|-------------------|-------------|-----|---------|---------|----------|-------|-------|----------|-----------|
| <input type="checkbox"/> | | | | | | 0.00 | 0.00 | 0.00% | 0.00 | 0.000000 | 0.00 |

5. Select a new **Company Location** if necessary. This field will filter the grid details by company location.

6. Enter a new ordered **Quantity** if necessary. This field will default to the Recipe Quantity setup on Recipe screen.

The screenshot shows the 'Add Recipe' window with the following details:

- Customer ID: 0001005095
- Company Location: 0001 - Fort Wayne
- Layout: Filter Records (F3)
- Grid columns: Item No, Description, Quantity, UOM, Version, Location, Process
- Grid rows:
 - 89G 89 Midgrade Gaso... 1.00 Gallon
 - PKG AWR Peru 50 lb PKG AWR Peru 50 lb 1.00 50 lb bag
 - GRN BLD Robasta ... GRN BLD Robasta ... 1.00 LB
 - FG Hay FG Hay 1.00 LB
 - Finished Goods02 [] Each 2.00 0001 - Fort Wayne Bulk Produce

You can expand the grid, by clicking the **+** button, to view the recipe ingredients.

The screenshot shows the 'Add Recipe' window with the 'Finished Goods02' row expanded. The expanded view shows the following ingredients:

| Item No | Item Description | UOM | Quantity | Available Qty | Price |
|--------------|------------------|------|----------|---------------|----------|
| ingredient01 | for recipe01 | Each | 1.50 | 231.50 | 1.871234 |
| ingredient02 | for recipe02 | Each | 3.00 | 280.00 | 3.000000 |

7. Click **Add** button to add the ingredients to the sales transaction grid.

 If one of the ingredients of the recipe do not have enough stock, the Recipe will not be added to the sales transaction.

Here is a sample transaction after adding above sample recipe.

The screenshot shows the 'Sales Order - ABC Reseller' window with the following details:

- Customer: ABC Reseller
- Ship To: ABC Reseller
- Date: 04/22/2016
- Location: 0001 - Fort Wayne
- Terms: 5% 5, Net 30
- Comments: Sample adding of recipe.
- Grid columns: Item No, Contract No, Contract Se, Description, UOM, Shipped, Ordered, Discount, Tax, Price, Total, Tax Group
- Grid rows:
 - ingredient01 for recipe01 Each 0.00 1.50 0.00% 0.00 1.871234 2.81 IN SST
 - ingredient02 for recipe02 Each 0.00 3.00 0.00% 0.00 3.000000 9.00 IN SST
- Subtotal: 11.81
- Total: 11.81

8. **Save** or **Post** the transaction.