

How to Add a Recipe without Customer specified to the Sales Order

The following will show you how to add a Recipe without Customer specified to a Sales Order.

- Before you proceed with the succeeding steps, make sure that:
 - Ingredients are properly configured, see [How to Add Inventory Type Item to be used as Ingredient in a Recipe](#).
 - Finished Good item is properly configured, see [How to Add Item - Finished Good Type](#).
 - Recipe is properly configured, see [How to Create a Recipe](#). Make sure that Recipe created has NO customer specified.
- Click on **Sales (A/R) > Activities > Sales Orders**. If there is no existing record yet, this will open a new Sales Order screen. If not, click the **New button** in the Sales Order search screen.

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.
- In the grid, click **Add Recipe** to open the **Add Recipe to Sales Order** screen. To show the recipe without customer specified, click the **x button** to clear the filter field. This then will show all recipes.

Sales Order - Sherland Farms

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

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

Type Standard Recurring Bill To Home PO Number Order No Created On Save

Customer Sherland Farms Ship To Home BOL No Split

Date 12/20/2017 Ordered By IRELY ADMIN Status Open Salesperson Matt Wielinski

Currency USD Ship Via Freight Term Contact Chuck

Location 0001 - Fort Wayne Comments Maint thank you

+ Insert Open Remove Add Recipe Get Previous Details Pricing Report View Filter (F3)

Item No Contract No Sequence Description UOM Shipped Ordered Discount Tax Currency Unit Price Total Tax Group

0.00

Add Recipe to Sales Order

OK Update Price Recipe Guide Close

Details

Recipe

Report View Sherland Farms

Recipe Name Item No Description Quantity UOM Customer Version No Cost Type Margin By Margin

AB1 all AB1 AB1 desc 1.00 lb1 2

click this x button to clear the filter field

- You can now filter the grid by typing in the **Recipe Name** and press enter. Select the Recipe to show its details in the **Recipe Details** grid.

Add Recipe to Sales Order

OK Update Price Recipe Guide Close

Details

Recipe

Report View ab1

Recipe Name Item No Description Quantity UOM Customer Version No Cost Type Margin By Margin

AB1 all AB1 AB1 desc 1.00 lb1 2

Recipe Details

Report View Filter (F3)

Item No.	Description	Comment Type	Quantity	UOM	Document No.	Cost Source	Sales Contract	Customer Storage	Cost
A1	A1 desc		0.6	lb1		Item			
B1	B1 desc		0.4	lb1		Item			

- Click OK to bring over the ingredients of the recipe onto Sales Order > Item grid.

Add Recipe to Sales Order

OK Update Price Recipe Guide Close

Details

Recipe

Report View ab1 x

Recipe Name	Item No.	Description	Quantity	UOM	Customer	Version No	Cost Type	Margin By	Margin
AB1 all	AB1	AB1 desc	1.00	lb1		2			

Sales Order - Sherland Farms

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

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Location 0001 - Fort Wayne Comments Maint:thank you

+ Insert Open X Remove Add Recipe Get Previous Details Pricing Report View Filter (F3)

Item No	Contract No	Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Currency Unit	Price	Total	Tax Group
A1			A1 desc	lb1	0.00	0.6	0.00%	0.00	USD	2.00	1.20	
B1			B1 desc	lb1	0.00	0.4	0.00%	0.00	USD	5.00	2.00	
					0.00	0.0	0.00%	0.00		0.00	0.00	

- Click Save.



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.

If you intend to process this Sales Order to Invoice, see [How to Process Sales Order with Blend to Invoice](#).

- Navigate to Manufacturing --> Recipes.
- Recipe Manager screen is loaded.

Recipe

New View Refresh Close

Layout Filter Records (F3) 18 records

Item No	Description	Quantity	UOM	Version No	Active	Location	Work Center	Process Name	Customer
10001	WM Milk Cow Tr...	2000	pound	1	<input type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076
10002	WM ADE Premix...	2000	pound	1	<input checked="" type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076
10004	WM Selenium O...	2000	pound	1	<input type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076
10003	WM Calf Trace ...	2000	pound	1	<input checked="" type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076
10039	Cobalt Sulfate ...	2000	pound	1	<input checked="" type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076
10061	Vitamin D3 Sup...	2000	pound	1	<input checked="" type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076
10004	Premix Flush #...	2000	pound	1	<input checked="" type="checkbox"/>	Pinnacle Premix	Mixer Mfg Cell	Mixer Process	1000076

- Click on New button.
- Recipe detail screen is loaded.

Recipe

New Save Search Delete Undo Close

Details Substitute

Item No: Description: Process: Imp. Override: ☐

Version: Customer: Location: Auto Blend: ☐

Quantity: Farm: Mfg. Cell: Active: ☒

UOM: Field: Cost Dist. Method:

Add Input Item



Group Name	Item No	Description	Quantity	UOM	Lower Toleranc...	Upper Toleranc...	Shrinkage (%)

Add Output Item

Item No	Description	Mandatory	Quantity	UOM	Lower Tolerance (%)	Upper Toleran
		<input type="checkbox"/>				

5. Entering the Recipe Header details

A. Select the Item No from the drop down.

Item No:	10001	Description:	WM Milk Cow Trace Mine																												
Version:																															
Quantity:																															
UOM:																															
Add Input Item																															
 Remove	 Lay																														
<input type="checkbox"/> Group Name																															
<input type="checkbox"/>																															
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6. Select the Process from the drop down.
7. Select the Customer from the drop down.
8. Select the Location from the drop down.
9. Enter the Quantity.
10. Select the Mfg. Cell from the drop down.