

How to Add Recipe to Sales Transactions

- 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 PO Number: Salesperson: Jared Smit Status: Open

Date: 04/22/2016 Due: 05/22/2016 Ship Via: UPS BOL No: Split: Currency: USD

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

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

Item No	Contract N	Contract S	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
						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.

Add Recipe

Add Close

Details

Customer ID: 0001005095 Company Location: 0001 - Fort Wayne

Layout Filter Records (F3)

Item No	Description	Quantity	UOM	Version	Location	Process
89G	89 Midgrade Gaso...	1.00	Gallon	1.00	0001 - Fort Wayne	Blending
PKG AWR Peru 50 lb	PKG AWR Peru 50 lb	1.00	50 lb bag	1.00	0001 - Fort Wayne	Packaging
GRN BLD Robasta ...	GRN BLD Robasta ...	1.00	LB	1.00	0001 - Fort Wayne	Blending
FG Hay	FG Hay	1.00	LB	1.00	0001 - Fort Wayne	Bulk Produce
Finished Goods02			Each	2.00	0001 - Fort Wayne	Bulk Produce

Ready

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

Add Recipe

Add Close

Details

Customer ID: 0001005095 Company Location: 0001 - Fort Wayne


Layout Filter Records (F3)

Item No	Description	Quantity	UOM	Version	Location	Process
FG Hay	FG Hay	1.00	LB	1.00	0001 - Fort Wayne	Bulk Produce
Finished Goods02		3.00	Each	2.00	0001 - Fort Wayne	Bulk Produce

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

Ready

- 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.

Sales Order - ABC Reseller

NewSaveSearchDeleteUndoPrintPick TicketShipInvoiceDuplicateCustomerClose

DetailsInstructionsPayments (0)Attachments (0)Audit Log (0)Comments (0)

Type:StandardRecurring:Bill To:ABC ResellerOrdered By:IrelyadminOrder No:Created On Save

Customer:ABC ResellerShip To:ABC ResellerPO Number:Salesperson:Jared SmitStatus:Open

Date:04/22/2016Due:05/22/2016Ship Via:UPSBOIL No:Split:Currency:USD

Location:0001 - Fort WayneTerms:5% 5, Net 30Freight Term:Comments:Sample adding of recipe.

+ InsertOpenRemoveAdd RecipeGet Previous DetailsLayoutFilter Records (F3)

Item No	Contract N	Contract Se	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
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
					0.00	0.00	0.00%	0.00	0.000000	0.00	

Bill To:ABC ResellerSomewhere St.Indianapolis, IN, 46204 United

Item:On Hand:On Order (PO):Committed:Back Order:

Quote:Subtotal:11.81Shipping:0.00Tax:0.00Total:11.81

Ship To:ABC ResellerSomewhere St.Indianapolis, IN, 46204 United

Edited

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8. Save or Post the transaction.