

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.

The screenshot shows the 'Sales Order - ABC Reseller' window. The 'Details' tab is active. The 'Add Recipe' button is highlighted in the top toolbar. The main grid shows the following data:

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

- 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.

The screenshot shows the 'Add Recipe to Sales Order' window. The 'Details' tab is active. The 'Recipe' section shows 'Recipe01' selected. The 'Recipe Details' section shows the following data:

Item No	Description	Quantity	UOM	Cost Source	Sales Contract	Cost	Margin By	Margin	Price
ingredient02	for recipe02	1	2pcs	Item		6	Amount	0.5	6.5
ingredient01	for recipe01	3	Each	Item		1.871234		0	5.613702
		4							12.113702

- 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 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.

- Before you proceed with the succeeding steps, make sure the Recipe has been created.
- Open the transaction screen, e.g. Quote, Sales Order, Invoice, or Credit Memo , where you will add a recipe.
- Fill out the necessary header details.
- 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 Smith 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 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	

- 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

Customer ID: 0001005095 Company Location: 0001 - Fort Wayne

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		3.00	Each	2.00	0001 - Fort Wayne	Bulk Produce

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

Add Recipe

Customer ID: 0001005095 Company Location: 0001 - Fort Wayne

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

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

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 Smitt 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.

Item No	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 Reseller Somewhere St. Indianapolis, IN, 46204 United

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

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

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

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