

# SoapMaker 3 Users Manual

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## Document Organization

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Welcome to **SoapMaker 3**, a fully integrated set of tools for soap crafters. SoapMaker is available in 3 editions:

**PROFESSIONAL** - provides a powerful set of features to help you create the best soap recipes, organize and compare recipes at a glance, manage your inventory of ingredients and products, track your purchases and sales and generate customer invoices.

**LITE** - provides all the recipe features of the Pro edition, without inventory management and other business related features. If you have the Lite edition, you can [upgrade to Pro](#) at any time.

**FREE** - recipe calculator with many of the features of the LITE edition, and demonstration of PROFESSIONAL edition features. If you start with the FREE edition and later decide to purchase LITE or PROFESSIONAL, any recipes and ingredients you have defined will be available with the upgraded edition.

Throughout this manual, features which are only available with the Professional edition are flagged like this: **Pro**

If you're a new user with LITE or PROFESSIONAL edition, browse through the [Getting Started with SoapMaker 3](#) section. Then look at the [Initial Setup](#) topics which will guide you step-by-step in setting up your data for the first time.

This User's Manual contains a complete description of all SoapMaker's commands and features, organized into the following main sections:

- [Updates and Re-installation](#) – how to get the latest update, or re-install SoapMaker on your computer.
- [SoapMaker FREE edition](#) - special manual section for users of the free calculator
- [Getting Started with SoapMaker 3](#) – provides an overview, and introduces the main elements of the program.
- [Management Centers](#) – provides a complete description of the 3 main windows which provide the starting point for most of the tasks you will perform in SoapMaker.
- [Common Tasks](#) – includes instruction topics for many of the tasks you can perform with SoapMaker, including the [Initial Setup](#) steps. Please see this topic before starting to enter your data.
- [Tools](#) - describes various tools to assist your process.
- [Reports](#) - lists and describes the various reports you can produce to help manage your business.
- [Menus](#) - describes all the commands available under the Main menu
- [Q and A](#) - a list of common questions and answers
- [Reference](#) - definitions, technical and general information
- [Company Information](#) - licence, history and how to get help.

If you cannot find an answer in this document, try the online [knowledge base](#) which contains an extensive set of questions and answers.

Note: SoapMaker can help you make better soap and be more successful in your soapmaking enterprise. However, this User's Manual is not intended as a primer on making soap. It is assumed that users of SoapMaker already have some knowledge of how to make soap.

For good sources of information about soapmaking, see the topic [Suggested Reading](#).

## Updates and Re-Installation

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### SoapMaker 3 Updates

You can find out if there is a more recent version available by choosing **Check for Updates** under the main **Help** menu. If an update is available, you can install it as follows:

1. Make sure you have a backup copy of your database, and that you are logged in to your computer with administrative privileges.
2. Download the latest version from [www.soapmaker.ca/update.php](http://www.soapmaker.ca/update.php) - you will need the **password** you received when you first purchased SoapMaker, or registered it online. If you have forgotten your password, you can request a new one there.
3. Run the downloaded SoapMaker installer - it will replace the previous SoapMaker 3 version (you don't have to uninstall the older version first). Make sure you are logged in to your computer with administrative privileges before running the installer.

### Release Notes

If you have just updated to a new version and want to see what has changed, choose **View Release Notes** under the **Help** menu (an internet connection is required).

### Re-installing on a New or Repaired Computer

You cannot re-install SoapMaker simply by copying the program file from the previous location. You must run the **SoapMaker installer** to install the program.

You can download the latest version of the SoapMaker installer by logging in to [www.soapmaker.ca/update.php](http://www.soapmaker.ca/update.php). While logged in, you will see your **Registration Number** - you will need this the first time you run SoapMaker on your new or repaired computer.

After downloading the installer, run it to install SoapMaker. Make sure you are logged in to your computer with administrative privileges before running the installer.

Then open SoapMaker. You will need to register it again using the **Registration Number** you received when you purchased it. Restore your database from your latest backup copy using the **Restore Data** command.

### Re-installing to solve a problem

If you have not lost your hard drive contents and have the latest version but want to re-install SoapMaker to solve a problem, download the SoapMaker installer as described above, then run the installer and select the **Repair** option.

If you still have problems, then **uninstall** SoapMaker (Open the Control Panel **Programs and Features**, select SoapMaker3 and click Uninstall) and then run the installer to re-install it from scratch. Open SoapMaker, and if you no longer see your database content, restore your database from your latest backup copy using the **Restore Data** command.

If you have problems and want to revert to an earlier version, you can download the previous version from [www.soapmaker.ca/update.php](http://www.soapmaker.ca/update.php).

You will need to have a backup copy of your database from before you installed the latest version, because your current database may not be compatible with the earlier version of the program. When ready, uninstall SoapMaker, then run the previous version installer. When asked, choose to restore your backup database.

## Upgrading to Pro

### Upgrading from Lite to Professional Edition

If you currently have SoapMaker 3 **Lite** and want to move up to the **Professional** edition, you can purchase a new registration number at the special upgrade price. This will turn on all the Pro features. Simply click **Upgrade** under the **Help** menu to open this dialog window...

When you have completed your upgrade purchase, you will receive a new **registration number** which replaces your current Lite edition number. Enter the new number and click the **Submit** button.



### Initial Setup after Upgrading

To begin using the inventory management features, you will need to set up your stocklists of supplies and products so they match your actual stock. Once you have done this, SoapMaker will keep track of your inventory, adjusting it each time you [make a batch](#).

### Supplies Inventory

If you have **not** already recorded all your purchases of supply items with stock still remaining, see the topic [Supplies Setup - Recording Purchases...](#)

Otherwise, you just need to enter the actual quantity you have of each stock item as follows: With a list of all your ingredient and packaging item quantities in stock...

1. In MySupplies, select the first stocklist item for which you have stock left in your inventory, and click **Purchases** on the toolbar. This will open the [Purchase History](#) report. All purchase records of the selected item are listed here, with the most recent at the top. Since you have not previously been using inventory management, the **quantity left** column shows zero.

| Date (Y-M-D) | Order # | Supplier               | Lot #   | Best Before | Quantity | Cost   | PerUnit | Left    | Special |
|--------------|---------|------------------------|---------|-------------|----------|--------|---------|---------|---------|
| 2018-10-01   | 14      | Oils Galore!           | 18-9734 | 2019-10-01  | 4.0 gal  | 208.00 | 52.00   | 4.0 gal |         |
| 2018-08-06   | 13      | Oils Galore!           | 18-8734 | 2019-08-06  | 6.0 gal  | 198.00 | 33.00   | 6.0 gal |         |
| 2018-07-05   | 12      | EZ Soapmaking Supplies | 18-5678 | 2019-07-05  | 6.0 gal  | 192.00 | 32.00   | 3.5 gal |         |
| 2018-05-08   | 11      | Oils Galore!           | 18-1234 | 2018-10-31* | 6.0 gal  | 168.00 | 28.00   | 0.0 gal |         |

2. For each purchase record which still has stock remaining, select it and click **Edit** on the toolbar (or double-click the record), and enter the correct quantity to match your actual inventory.
3. A blue arrow indicates the oldest purchase with stock still remaining. This is the one SoapMaker will start drawing stock from when you make a batch using a recipe which contains this ingredient.

You can leave the **Purchase History** window open and click another item in MySupplies to see its history. Repeat these steps for each supply item for which you have stock left in your inventory.

### Products Inventory

After completing your supplies, set up your products inventory by following the steps in the topic [Products Setup...](#)

## SoapMaker FREE edition

### Introduction

The FREE edition of SoapMaker is a full-featured **recipe calculator** with recipe features similar to the purchased LITE and PROFESSIONAL editions. You are free to use it as long as you like.

It also provides **demonstrations** of the LITE and PROFESSIONAL features so you can evaluate if and when you might like to purchase an upgrade.

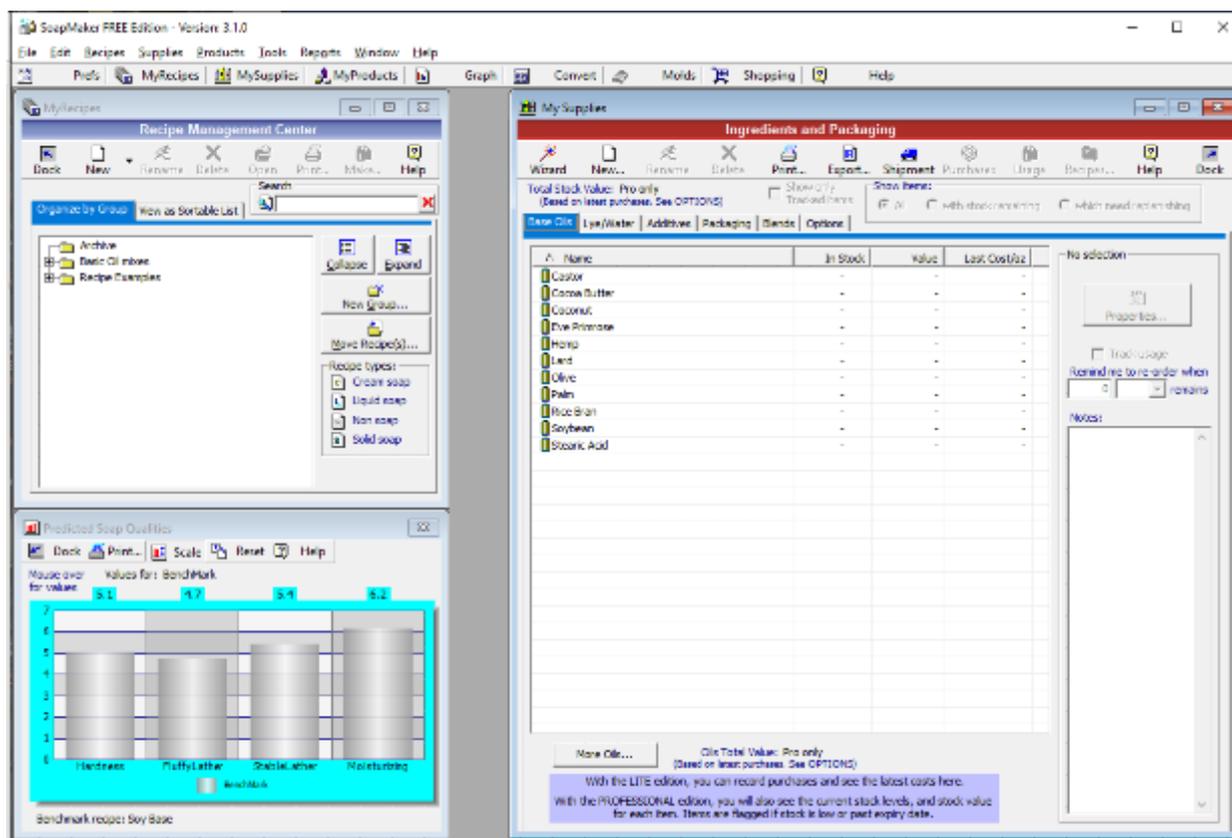
### Main Window

When you first run SoapMaker FREE, you will see the main window, with 3 sub-windows:

**MyRecipes** - This is your recipe management center, which lists all your recipes and provides controls for opening existing recipes, or creating new ones.

**Predicted Soap Qualities** - Shows graphically the expected qualities of all open recipes

**MySupplies** - Lists all your ingredients including base oils (saponifiable) and additives (any other ingredients such as scents and colors).

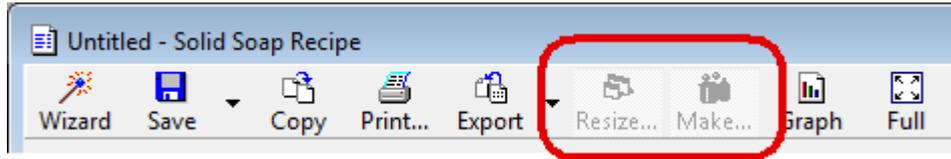


Each sub-window can be moved or resized, or docked by clicking its **Dock** button. You can close them when not needed by clicking the **X** in the upper right corner, and open them again by clicking the related button on the main toolbar.

These 3 sub-windows are the ones you will mostly use for the FREE edition features. But you can explore all the menus and main toolbar buttons to see demonstrations of LITE and PROFESSIONAL edition features.

The SoapMaker main window and most sub-windows have a **toolbar** with buttons to activate various functions. With the FREE edition, many of the purchased edition features are not available, but you can still click a button to see a demonstration or message explaining what the feature would do in the LITE or PROFESSIONAL edition. Toolbar buttons which only provide a demonstration or message, are grayed-out

as shown in this example:

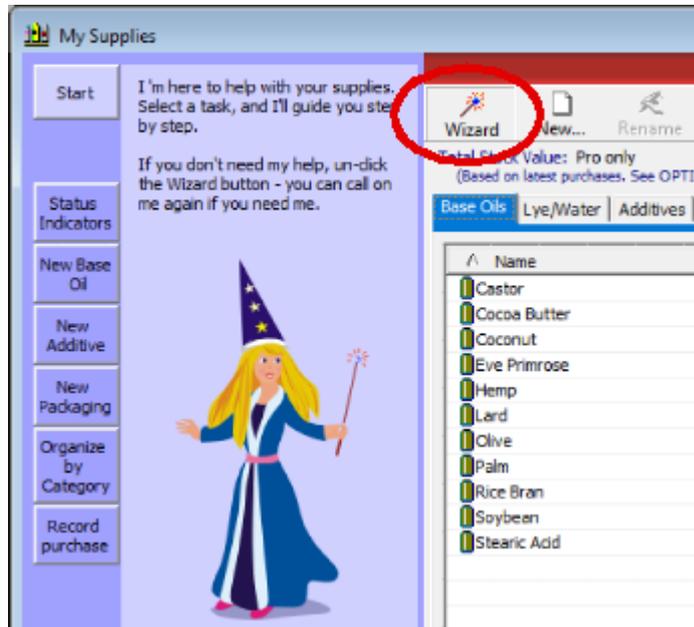


You can click these grayed buttons to learn about the LITE or PROFESSIONAL feature they would activate.

To see the function of any button, hover your mouse over it to see a pop-up **tooltip**.

MySupplies and the Recipe windows come with a pop-out **Wizard** panel showing basic instructions - just click the Wizard button on the toolbar to open or close the Wizard panel. Click the buttons on the left of the panel to see instructions.

Every window has a **HELP** button on the toolbar - clicking this will open the Users Manual at the related topic.



As you explore, you will see notifications like this, explaining the additional features available with the purchased editions:

With the LITE edition, you can record purchases and see the latest costs here.  
 With the PROFESSIONAL edition, you will also see the current stock levels, and stock value for each item. Items are flagged if stock is low or past expiry date.

[Next topic - MySupplies >>](#)

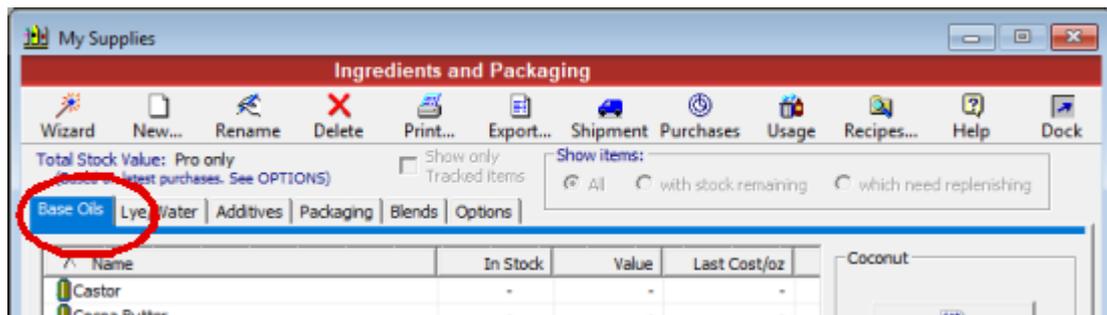
## MySupplies (FREE edition)

MySupplies is where you define all the ingredients you will use in your recipes. If you don't see it, click **MySupplies** on the main toolbar.

(With the PROFESSIONAL edition, MySupplies would show your inventory quantities and values, but these columns are blank with the FREE edition, and related controls are disabled.)

## Base Oils

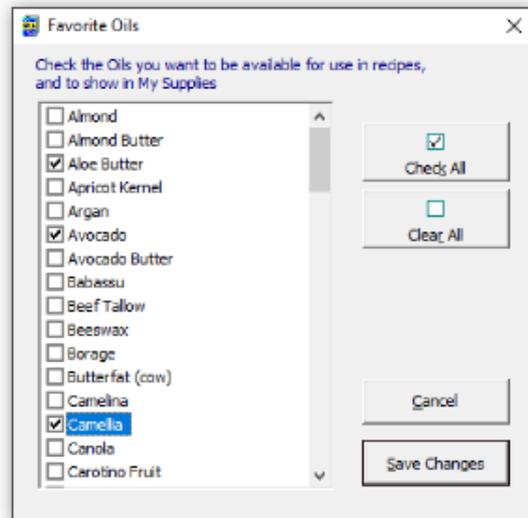
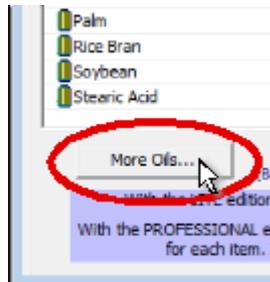
Click the **Base Oils** tab to see your list of saponifiable oils which can be used in recipes.



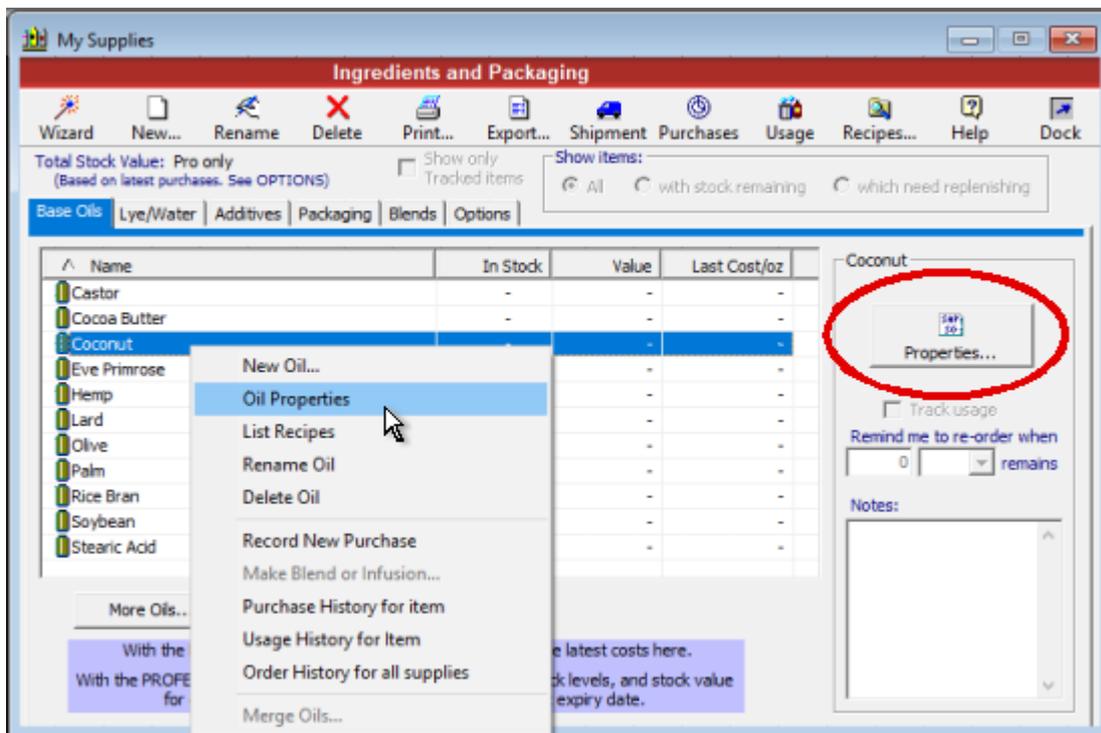
You can use any of the more than 80 **Base Oils** that come with the program, and you can add your own custom oils if desired.

If you don't see one you want, click the **More Oils** button to open a dialog and check all the oils you want to be able to add to your recipes.

(If you still don't see an oil you want, click the **New...** button on the toolbar - you will need to know the specifications for the oil, which should be available from your supplier, or online.)



To interact with an item in the list, select it and click any button on the toolbar, or right-click and choose an action from the pop-up menu. For example, to see the properties of Coconut oil, right-click it and choose **Oil Properties**, or click the **Properties** button.



(For more information about custom oils and oil properties, see the main topic [Oil Properties...](#))

[<< Previous topic](#)

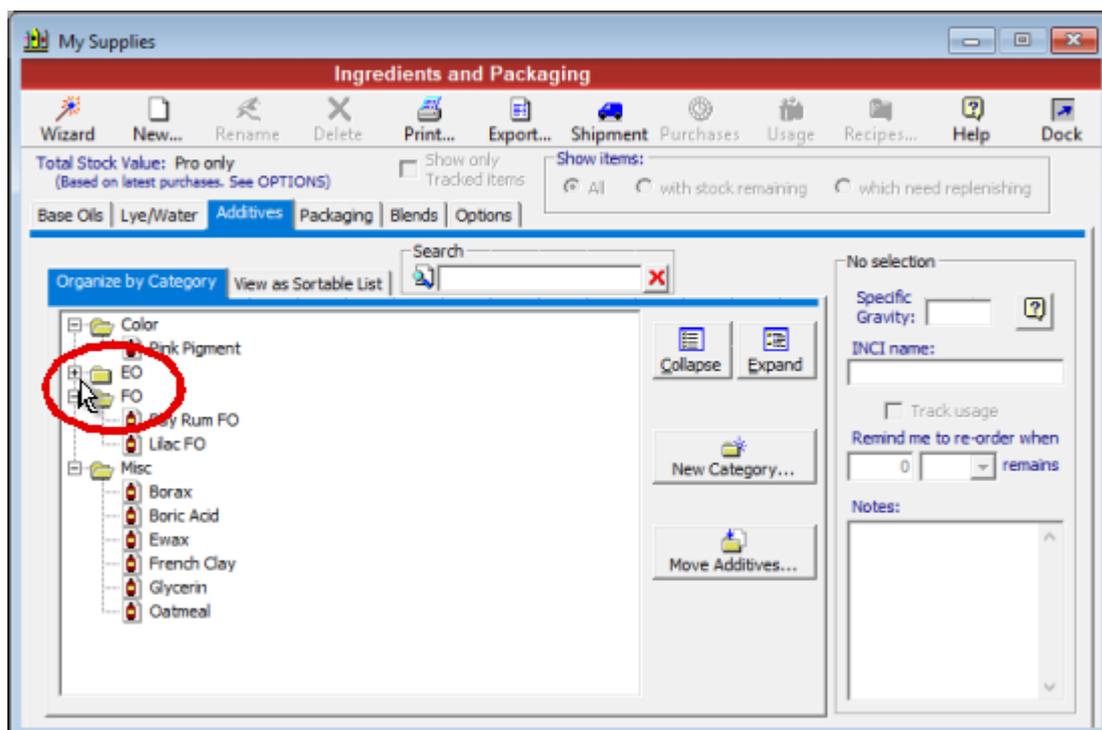
[Next topic - Additive Ingredients >>](#)

## Additives (FREE edition)

### Additives

You can define ingredients other than Base Oils to include in your recipes. The **Additives** tab in MySupplies has two sub-tabs:

**Organize by Category** - shows your additives in a Tree View by **Category**. You can define your own categories.



To expand or collapse a category, click the little **+** or **-** sign beside it. Or click the **Collapse** or **Expand** button to affect all categories.

You can easily **move** an additive to a different category by clicking and dragging it. Or you can move several at once by clicking the **Move Additives...** button.

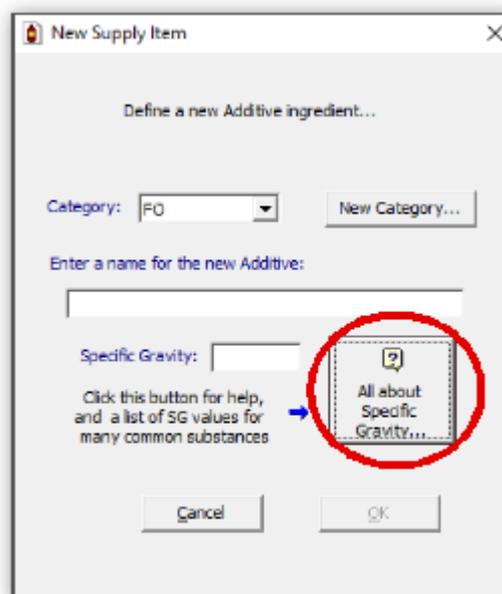
To create a new category, click the **New Category...** button.

To define a new additive ingredient, right-click a category and choose **New additive...** from the pop-up menu, or click the **New...** button on the main toolbar.

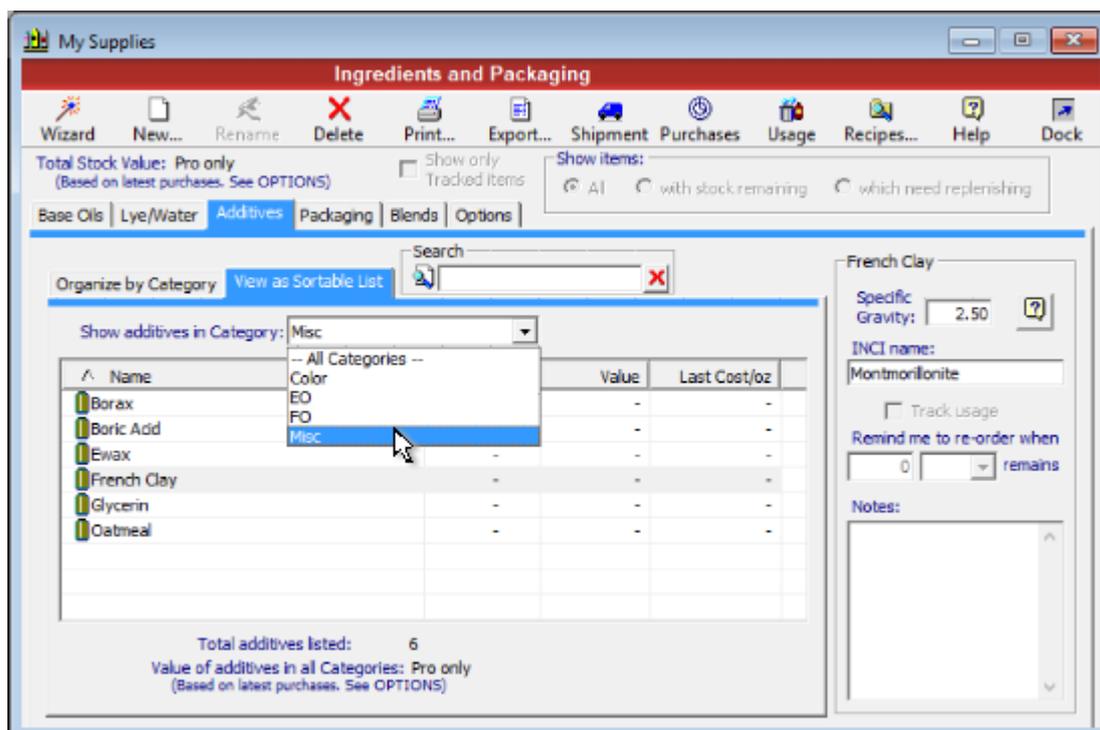
When defining a new additive, you will need to enter the substance's specific gravity (SG) - if you don't know what this means, just click the button labeled **All about Specific Gravity**.

SG is needed to accurately convert between weights and volumes. If you never need to enter liquid ingredients by volume (e.g. milliliters or fluid ounces) you don't need to worry about it - you can just enter a SG value of 1 (same as water).

**NOTE:** You should never enter powdered or granulated ingredients by volume - even if the SG is correct, you will not get an accurate conversion to weight because of entrapped air.



**View as Sortable List** - shows additives in the selected **Category**.



In the List view, you can select a category from the drop-down list, or choose **All Categories**. When you select a particular additive item, you see its specific gravity, as well as its INCI name if defined. You can enter **notes** about the selected ingredient here.

(With the PROFESSIONAL edition, the Sortable List view would show your inventory quantities and values, but these columns are blank with the FREE edition, and related controls are disabled.)

[<< Previous topic](#)      [Next topic - Recipes >>](#)

## MyRecipes (FREE edition)

### MyRecipes

MyRecipes is your recipe management center. If you don't see it, click **MyRecipes** on the main toolbar. It lists all your recipes, and provides commands to create new recipes, or make changes to existing ones. The FREE edition comes with example recipes you can use or modify if desired.

MyRecipes has two views:

**Organize by Group** - This tab shows a tree view of your recipes. You can create new groups and easily move a recipe to another group by dragging it.

To open an existing recipe, just double-click its name.

To rename or delete a recipe, you can either right-click it and choose the action from the pop-up menu as shown here, or select it and click a button on the toolbar.

SoapMaker support 4 types of recipes, indicated by an icon next to the name.

- **Solid soap** (using Sodium Hydroxide lye)
- **Liquid soap** (using Potassium Hydroxide)
- **Cream soap** (using both types of lye)
- **Non-soap** (with no lye - use this for lotions, balms, candles, etc.)

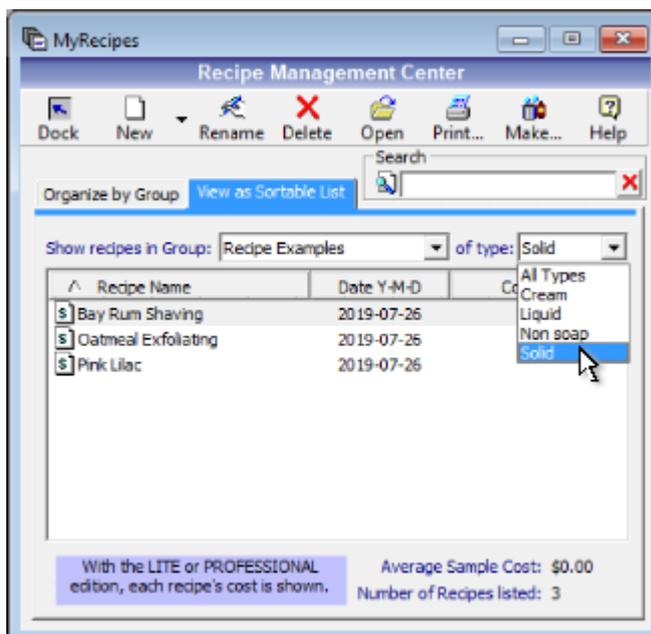
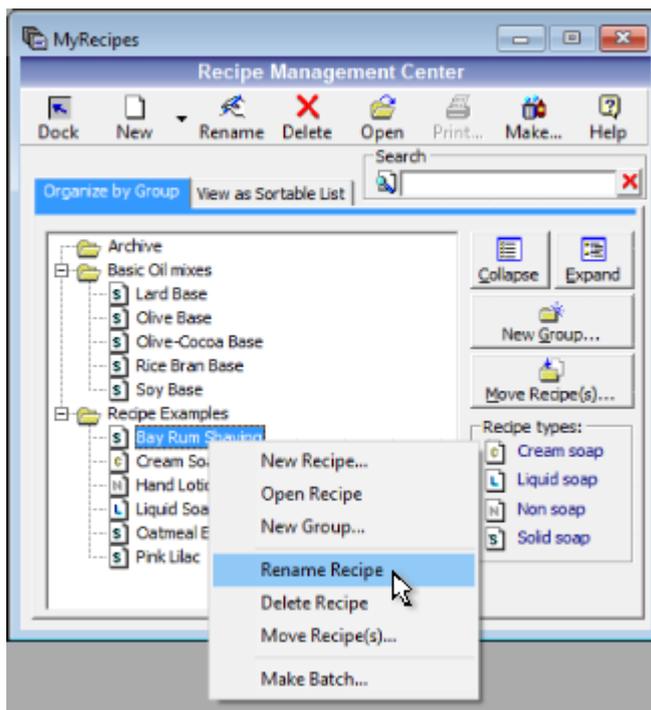
The **Archive** group is a special group where you can save old recipes you don't plan to use anymore.

**View as Sortable List** - This tab shows a list view of your recipes, with the date last changed of each recipe.

You can sort the list by **name** or **date** by clicking the column header.

To filter the list, choose a particular **group** or **All Groups**. You can also filter by **recipe type** as shown here.

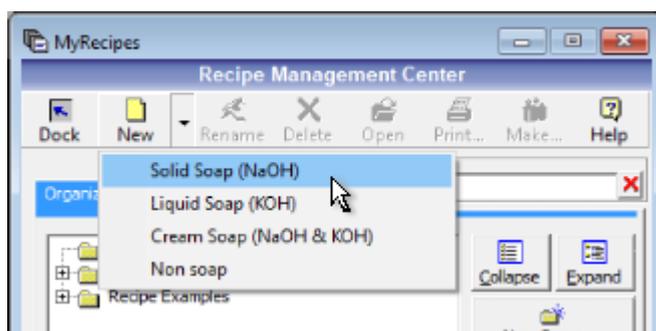
(With the LITE or PROFESSIONAL edition, the Sortable List view would show the sample cost of each recipe for easy comparison. This column is blank with the FREE edition.)



[<< Previous topic](#)

[Next topic - Creating a Recipe >>](#)

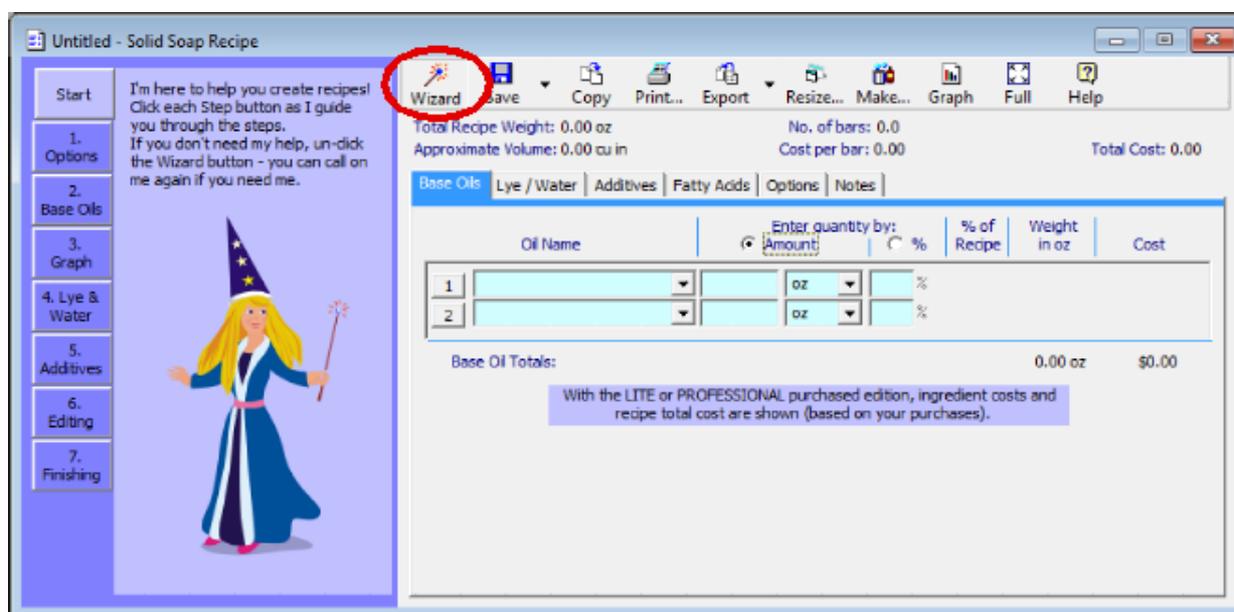
## Creating a recipe (FREE edition)



To create a new recipe, choose the desired type from the **New** button drop-down list.

This will open a blank recipe form of the desired type.

The recipe form has a pop-out **Wizard** panel to assist you with step-by-step instructions. It includes buttons for each step in completing the recipe. If you no longer need this, just click the **Wizard** button on the toolbar to hide it.



The form has separate tabs for **Base Oils**, **Lye** and **Water**, and **Additive** ingredients.

There is also an **Options** tab for setting your preferences for measurement units and size and quantity of bars/portions. After setting your options for this recipe, you can save them in your [Preferences](#) as defaults for all new recipes of the same type.

You can save **Notes** about this recipe, such as process steps, etc.

You can enter as many ingredients as you like - as you add more the form will automatically add additional rows. If you have many ingredients, you may want to stretch the form down by dragging its lower edge so you won't have to scroll the list.

If you prefer to see all the pages at once, click the **Full** button on the toolbar for a full-screen view.

(With the LITE or PROFESSIONAL edition, the Cost column would show the cost of each ingredient. This column is blank with the FREE edition, as is the Total Cost in the summary.)

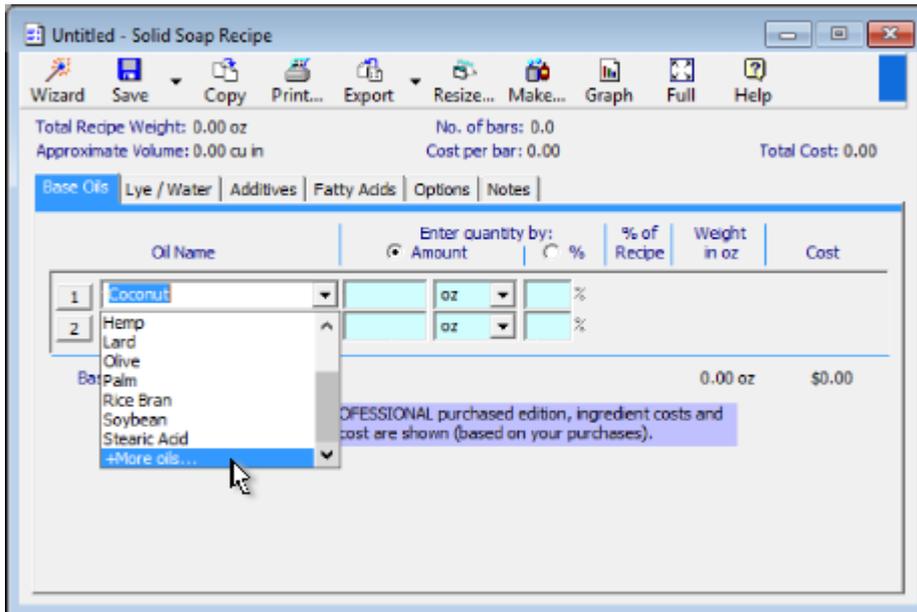
[<< Previous topic](#)      [Next topic - Entering Ingredients >>](#)

## Recipe ingredients (FREE edition)

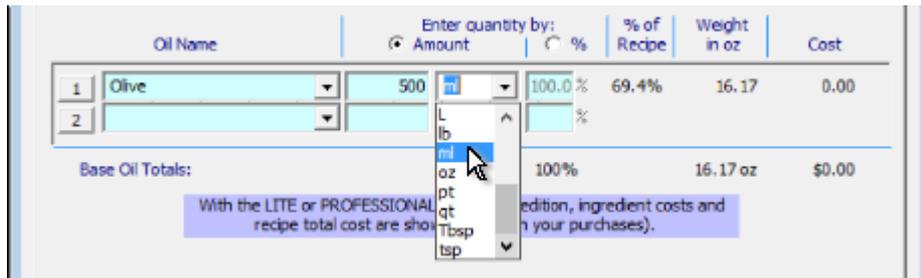
### Base Oils

The easiest way to enter ingredients is to just start typing the name. SoapMaker will auto-complete with the best match. Then press Tab to move to the next field.

Or you can select a name from the drop-down list as shown here. For Base Oils, only the names you have marked as **Favorites** are shown - if you don't see a name you want, select **+More oils...** to open the dialog where you can set another oil as a favorite.

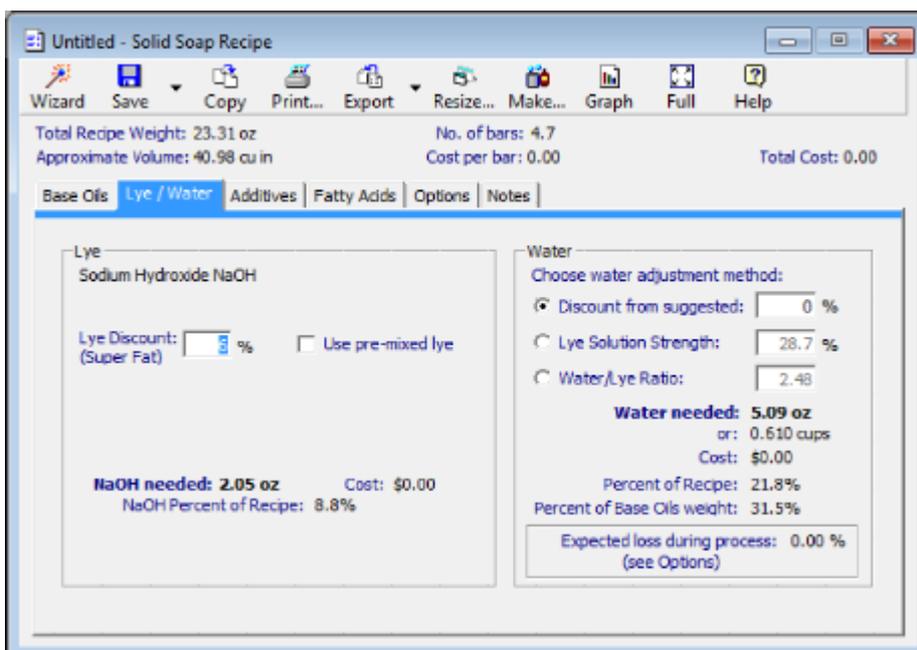


You can enter quantities in any units you like by typing or selecting from the drop-down list. In the example below, we're entering a quantity of 500 milliliters. The entered quantity is converted to the **calculated weight units** specified on the **Options** tab (ounces in this example).



## Lye and Water

For soap recipes, the **lye** and suggested **water** quantities are calculated for you. You can adjust these on the **Lye/Water** page of the recipe form:

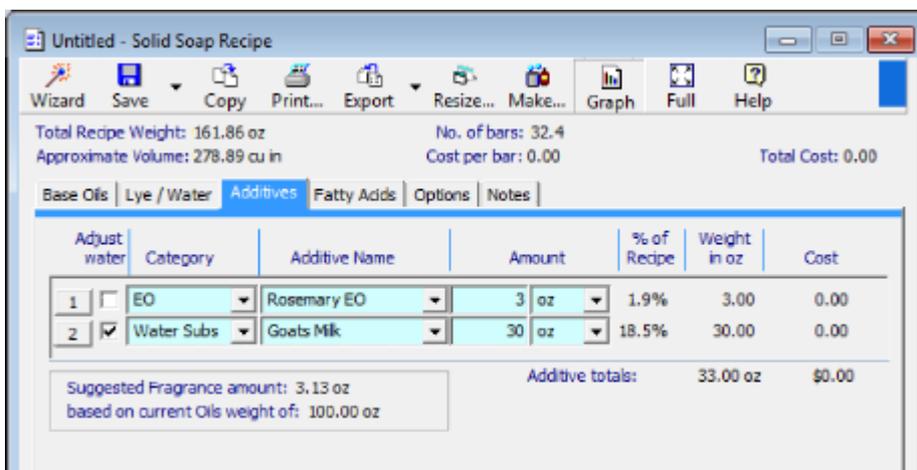


Lye quantity is calculated using the [SAP value](#) of each Base Oil in the recipe. You can 'super-fat' your recipe by entering a small **lye discount**. A discount of at least 4% is recommended to avoid a lye-heavy batch.

Water quantity is not critical - SoapMaker suggests a quantity to give a lye solution strength of about 30%, but you can adjust this by entering a positive or negative discount, or by entering a specific solution strength or water/lye ratio.

### Additives

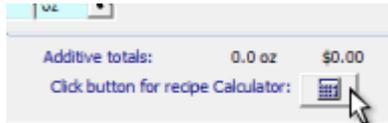
To make your recipes complete, you can enter any non-saponifiable ingredients on the **Additives** page. For each ingredient, type or select the **Category**, then type or select the **Name** and enter the amount. (To include an ingredient in recipes, it must first be defined in [MySupplies](#).)



If you use an ingredient to replace water, check the **Adjust Water** box as shown here for Goats Milk. When you first check this, it will fill in the quantity with the suggested water amount for the recipe, but you can enter whatever quantity you want. The water amount on the **Lye/Water** page will be adjusted accordingly.

The **Suggested Fragrance** amount is based on the currently entered Base Oils and is intended as a guide in specifying Essential Oils or Fragrance Oils. You can change the suggested rate on the **Options** page and in your [Preferences](#).

### Special Calculators



For **Liquid** and **Cream** soap recipes, a Calculator button will open a handy calculator window to aid in determining the correct amounts of process-specific additives.

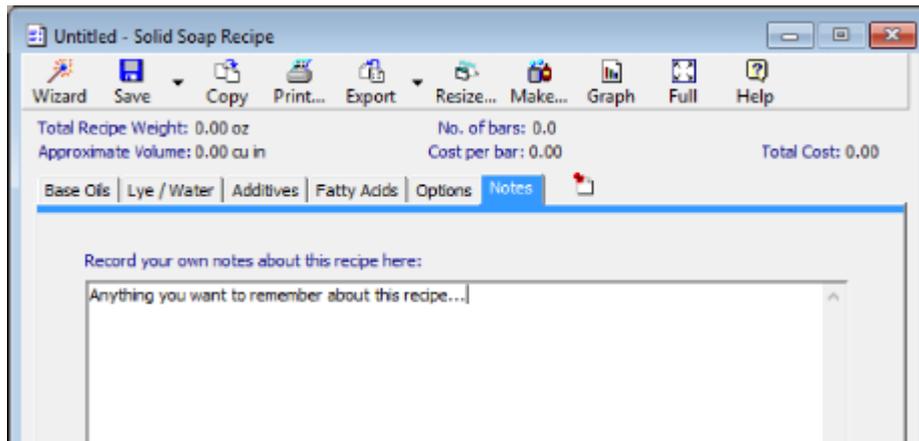
For more information see:

[Liquid Soap Calculator](#)

[Cream Soap Calculator](#)

## Notes

Each recipe can be saved with any notes you want to remember. If there is some content in the Notes field, a small icon of a pinned note appears next to the **Notes** tab.



[<< Previous topic](#)

[Next topic - Qualities Graph >>](#)

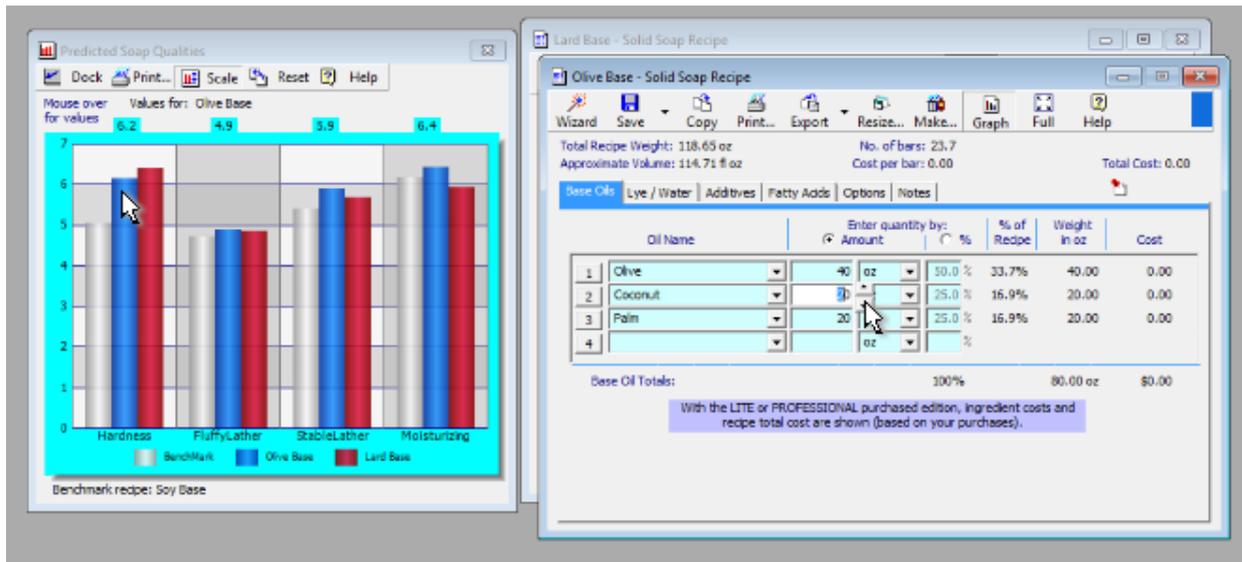
## Qualities graph (FREE edition)

The **Predicted Qualities Graph** shows the expected qualities of each open recipe for comparison. It also shows a benchmark recipe of your choice so you don't have to open that recipe in order to see it on the graph.

The predicted qualities include:

- hardness,
- lather fluffiness, (big bubbles)
- lather stability (creamy and long lasting), and
- moisturizing or conditioning.

In this example, we have two recipes open (Lard Base and Olive Base) so you can see them compared with the benchmark Soy Base. You can make any recipe your benchmark by clicking the button on its **Options** page.



The predicted qualities are calculated from the **fatty acid** composition, **SAP** value, and **Iodine** value of each Base Oil in the recipe. The calculations are not affected by Additive ingredients, although in practice these may affect the final qualities. This is only intended as a guide in selecting Base Oils and their relative amounts in a recipe.

You can watch the graph change dynamically as you adjust the quantity of a Base Oil in a recipe - you can do this by clicking in the **Amount** field and then clicking the little up/down arrows that appear as shown above.

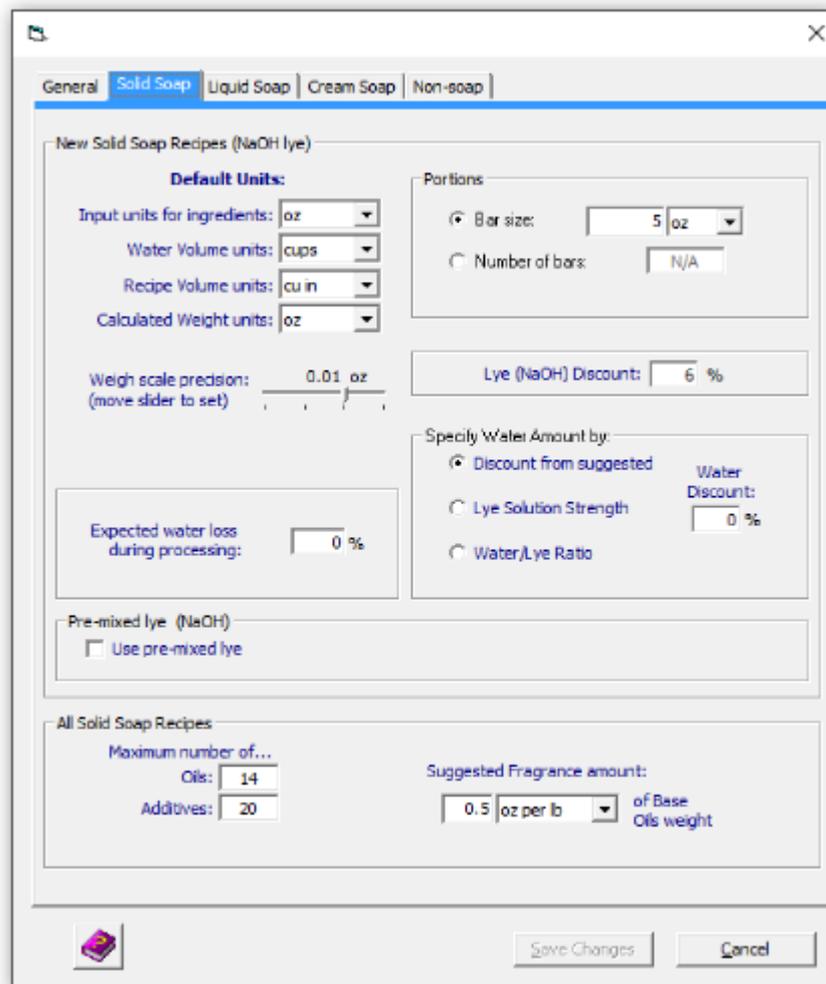
On the graph, you can see the quality numbers for a particular recipe by holding your mouse over one of the bars for that recipe - in this example you can see the values for the Olive Base recipe.

For more information about qualities, see the topic [Predicting Soap Qualities...](#)

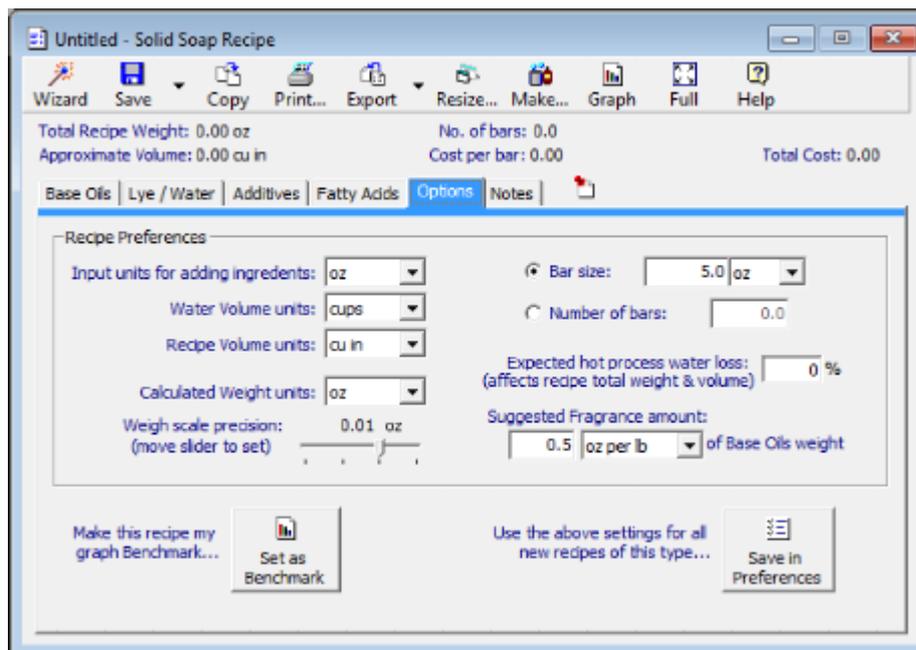
[<< Previous topic](#)      [Next topic - Options and Preferences >>](#)

## Options and Preferences (FREE)

Customize SoapMaker by clicking the **Prefs** button on the main toolbar to open **MyPreferences**. This provides a tab for each recipe type where you can set the default values you want to use for creating recipes:



When you open a recipe or create a new one, you can override the default settings on the recipe's **Options** page. If you make changes here that you want to use for all new recipes of the same type, click the **Save in Preferences** button - this will replace the default settings in MyPreferences with the new values.

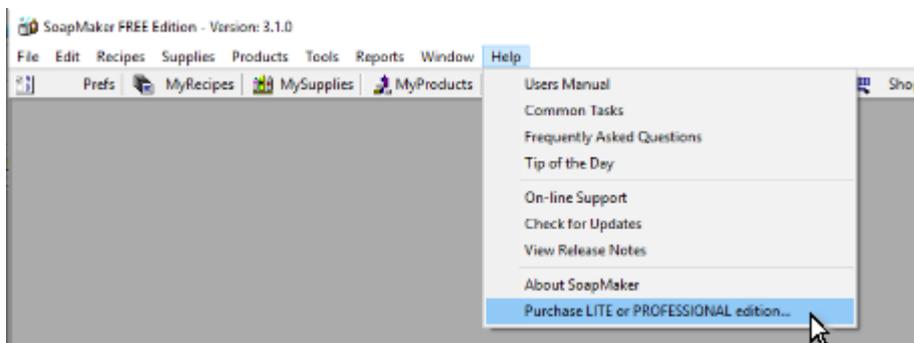


Also on the **Options** page, you can choose to make this recipe your **benchmark** which is always shown on the Qualities Graph.

[<< Previous topic](#)      [Next topic - Purchasing SoapMaker >>](#)

## Purchasing SoapMaker

If you enjoy the FREE edition and decide to purchase SoapMaker, just choose **Purchase LITE or PROFESSIONAL edition...** under the main HELP menu.



This will take you to the SoapMaker website where you can purchase immediately or select any of our registered resellers.

Once you download and install the LITE or PROFESSIONAL edition, your existing recipes and ingredients will still be available with all the new features of the purchased edition.

[<< Previous topic](#)      [Users Manual Contents >>](#)

## FAQs (FREE edition)

### FREE Edition Frequently Asked Questions

(Click one to see the answer)

[Is there an easy way to delete the \*\*examples\*\* that came with SoapMaker?](#)

[How can I send a picture of the SoapMaker \*\*screen\*\*?](#)

[I got an \*\*error\*\* message - what should I do?](#)

[How can I skip the Print Dialog whenever I print something?](#)

[How can I print to a file instead of the printer?](#)

[How do I correct an error in a supply order?](#)

[I purchased a blend of oils - how can I determine the properties?](#)

[How do I create a Melt & Pour soap recipe?](#)

[How do I make a recipe using both NaOH and KOH lye?](#)

[Why do the lye and water amounts differ from another lye calculator I've used?](#)

[I entered a small quantity of an ingredient, but later it shows zero. Why?](#)

[How do I super-fat my recipe with a specific oil?](#)

[How can I see all my recipe ingredients on the screen at once?](#)

[How do I upgrade to the LITE or PROFESSIONAL edition of SoapMaker?](#)

## Upgrade from FREE edition

How do I upgrade to the LITE or PROFESSIONAL edition of SoapMaker?

You can purchase SoapMaker by choosing **Purchase...** under the HELP menu. This will take you to the SoapMaker website where you can purchase using your credit card or Paypal account and download the new edition immediately.

All your saved recipes and supply items will automatically be available after installing the new edition.

## Getting Started with SoapMaker 3

---

### Welcome to SoapMaker 3

This section provides a quick overview, describing the major elements, and how they work together.

To enlarge this Help window, drag a lower corner.

Select the **Contents** tab at the left and expand the section heading to see the list of topics. or browse through in sequence by clicking links like this at the end of each topic...

[First topic >>](#)

**IMPORTANT:** When you feel comfortable with the main elements of the program, and are ready to start entering your own supplies and recipes, see the topic:

[Initial Setup...](#) (This will guide you through the process of entering your data in the correct sequence to avoid problems later.)

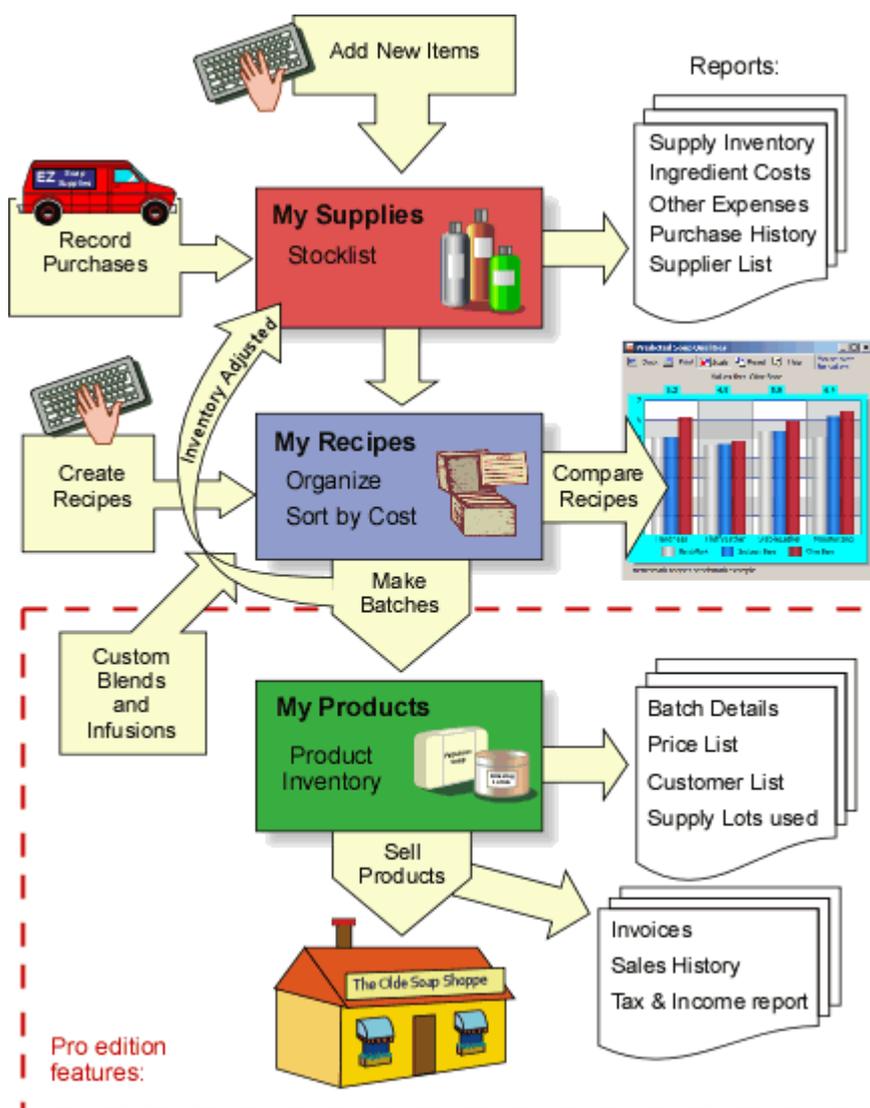
Throughout this manual, features which are only available with the Professional edition are flagged like this: **Pro**

## SoapMaker Overview

### Features and Workflow

SoapMaker supports each step in your process using 3 Management Centers:

**MySupplies**, **MyRecipes** and **Pro MyProducts...**



## Supplies

All the **ingredients** and **packaging items** you use in your products are recorded in [MySupplies](#).

When you enter new supply purchases, the new costs and quantities are shown in your stocklist. You can create a variety of reports to help you manage your stock.

## Recipes

Create and save recipes for all your products, including soap and other products such as lotions or candles. In [MyRecipes](#), organize your recipes into groups, compare their costs in a list, and print them as needed to take to your production shop.

For soap recipes, SoapMaker calculates the **lye** and **water** needed based on the oils you specify. By including **additives** and **packaging** items in your recipes, you can see the total **recipe cost**, and the cost per bar or portion sold.

The predicted **qualities** of your soap are calculated and displayed on a [graph](#), so you can compare different recipes and "test" your recipe before actually making it.

Existing recipes can be easily **resized** to a new total size, or to fit a mold.

## Pro Products

Each time you **make a batch**, SoapMaker records it in [MyProducts](#), showing the recipe used, the cost, and the number and size of the products (e.g. soap bars) made. Your supply inventory is automatically

reduced to reflect supplies used to make the batch.

When you record **sales**, your product inventory is automatically reduced to reflect the products sold. You can create a **customer invoice** from your sales record.

You can create a variety of reports to help manage your product stock and customer accounts, and to help with preparing your tax returns.

[Next topic >>](#)

## Inventory Management

**Pro** The Professional edition of SoapMaker includes a full suite of inventory management features. These features enable you to:

**Track your usage of supplies** so you know...

- how much of each is left in stock, and be reminded when it's time to order more
- the value of your stock on hand
- when you purchased each supply lot, and whether it has reached its expiry date

**Track your product stock** so you know...

- when each batch was made
- the quantities of each product you have in stock, when they are ready to sell, and how many were sold in a given time frame
- the value of your product stock
- to whom or where each product was sold
- your income and profit
- your usage history for any ingredient, showing the date, amount, products made, and customer sales

**Create and track payment of customer invoices**

**Maintain a standard Price List for all your products**

- automatically fill in prices when creating a customer invoice

Note: Inventory Management is optional in SoapMaker. If you do not want to use it, you can still:

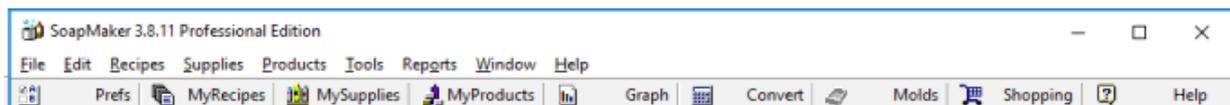
- record supply purchases so your recipe costs will be accurate
- maintain a list of suppliers
- keep a history of purchases

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## The Main window

### Menu and Toolbar Commands

The SoapMaker **main window** contains a menu bar and a toolbar across the top:

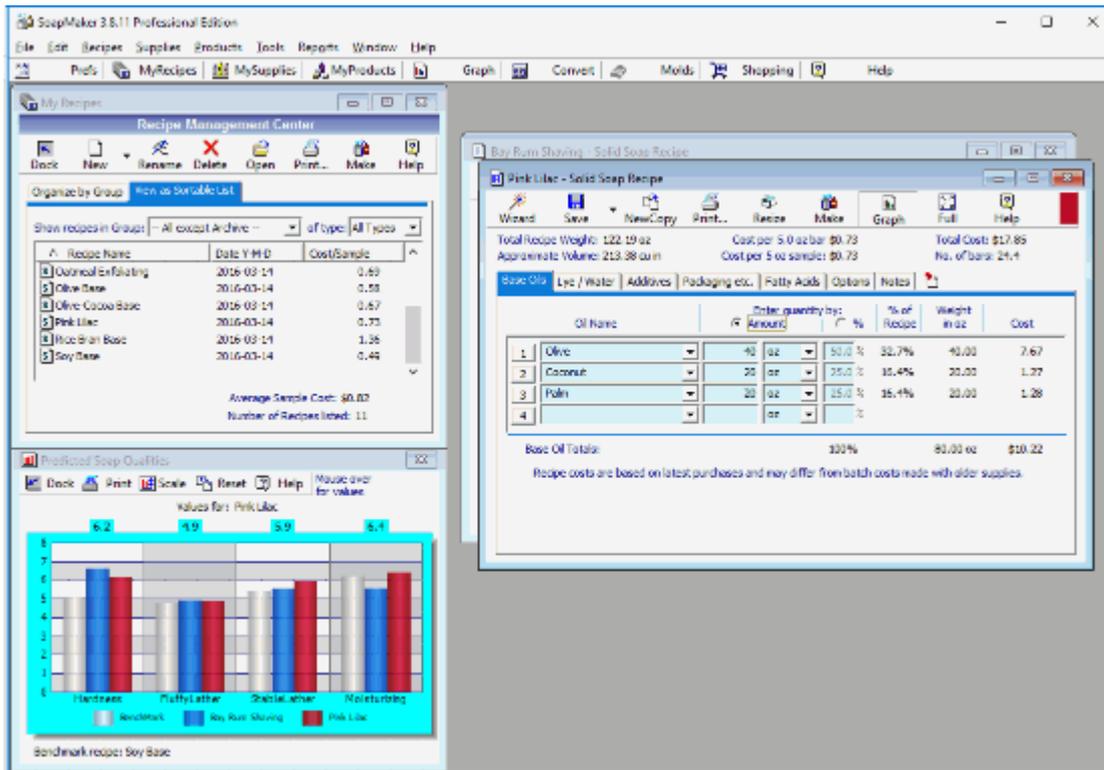


The **menus** provide access to all the major SoapMaker commands. The **toolbar** provides handy shortcuts to access elements you will use frequently. Hover your mouse cursor over any button to see a pop-up description of what the button does. (For a description of each menu command, see the [Menus](#) topic.)

### Sub-Windows

Other windows can be opened within the main window to perform various tasks. For example, to open the

Recipe Management Center, click the **MyRecipes** button on the main toolbar. You will generally have several windows open at once (e.g. MyRecipes, one or more Recipe forms and the Qualities graph).

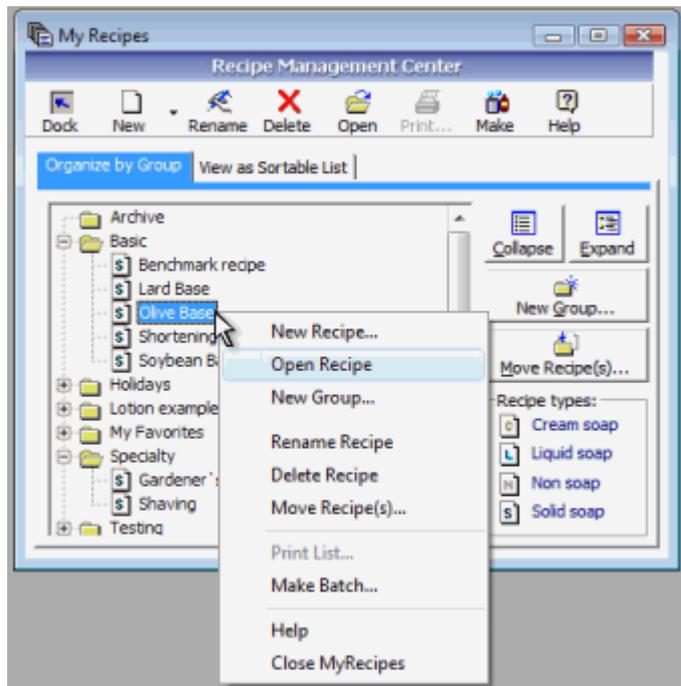


Each sub-window has its own toolbar or various buttons to control its operation. You can also access common commands by right-clicking the mouse to see pop-up **context menus** as shown in this example:

If you are no longer using a particular window, close it by clicking the **X** in the upper right corner.

The following topics in this section will introduce you to the main SoapMaker elements.

[<< Previous topic](#)      [Next topic >>](#)



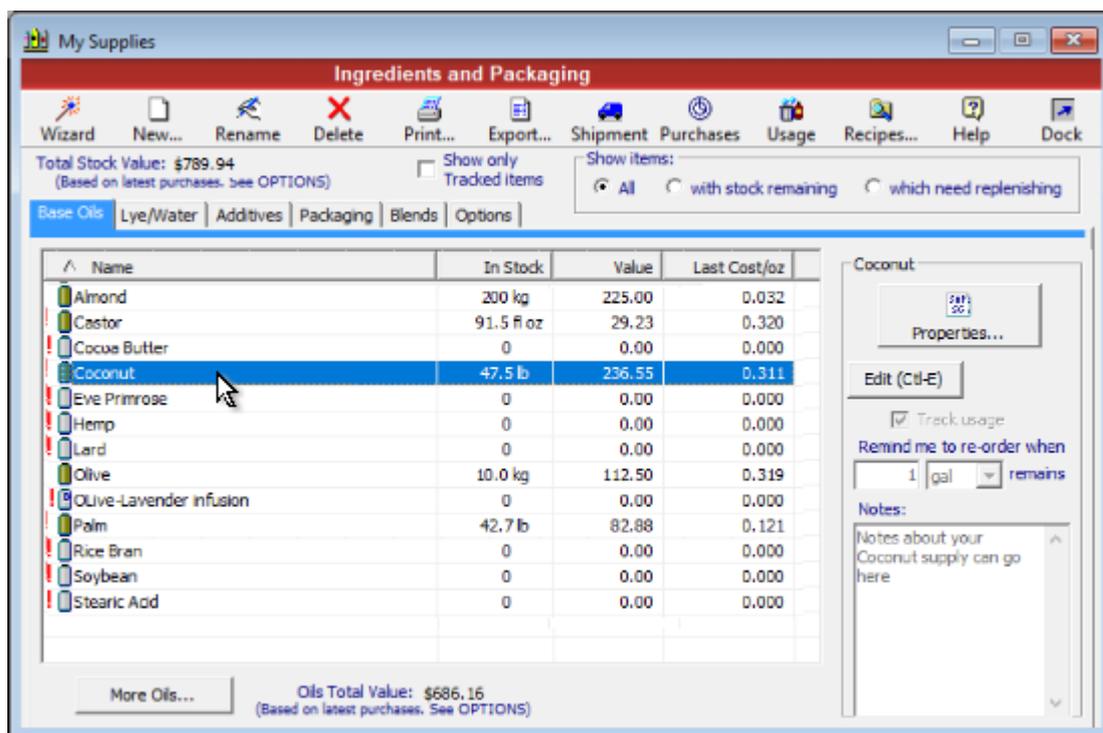
## MySupplies Introduction

### Ingredients and Packaging

MySupplies shows a stocklist of all the ingredients and packaging items you can use in your recipes.

**Pro** With the Pro edition, stock quantity and value are shown for each item you choose to track.

Buttons and menus provide commands for adding **new items** to the list, recording new shipments or **purchases**, and viewing **history** of purchases and usage.

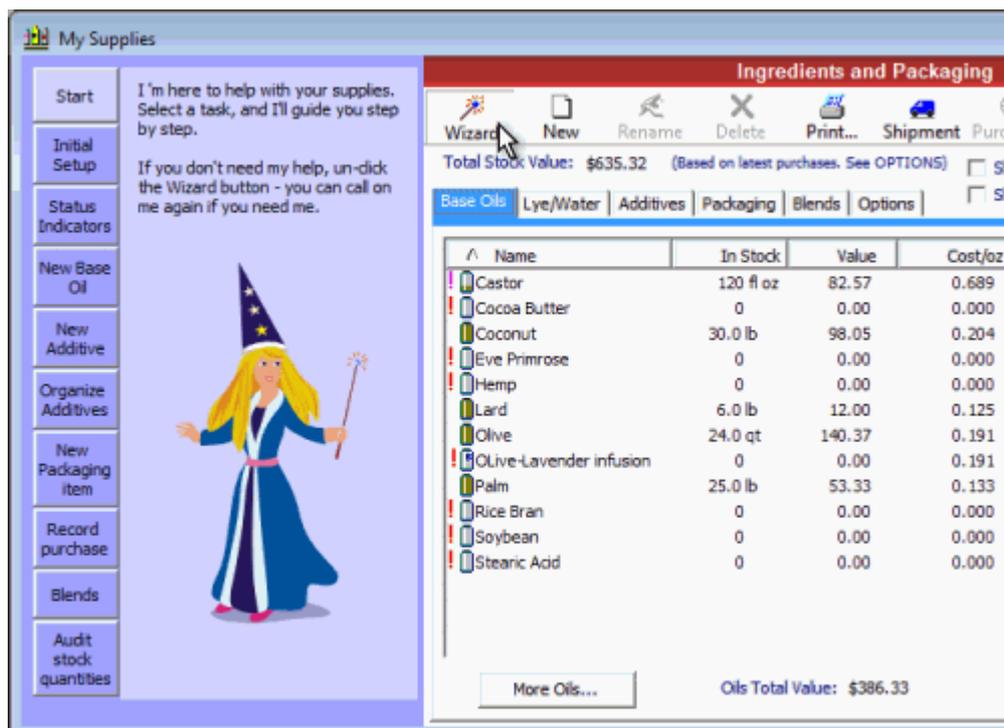


Supplies are divided into 4 types:

- Base oils:** These are the saponifiable oils and fats which form the base of your soap recipes
- Lye and Water:** NaOH and KOH lye, and water
- Additives:** Ingredients such as scents and colors, or anything else which is not a base oil.
- Packaging:** Items like bottles, labels, boxes, jars, etc. which you use to package your products.

## Wizard

While you are learning SoapMaker, the pop-out Wizard can guide you through various tasks. To show it, click the **Wizard** button on the toolbar. To hide it, click the button again.



Click an appropriate button on the left side of the Wizard pane for help with that task.

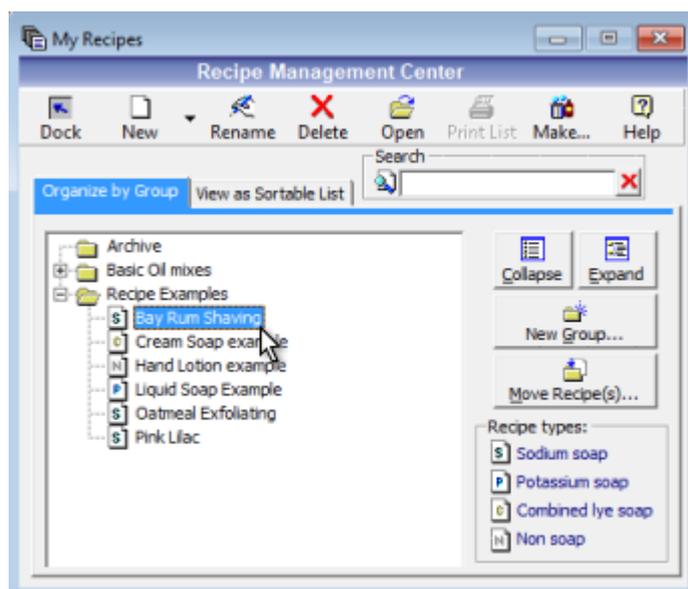
For a complete description, see the topic: [MySupplies](#).

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## MyRecipes Introduction

### The Recipe Management Center

**MyRecipes** lists all your recipes which are stored within SoapMaker's [database](#). Controls are provided for creating new recipes, and for opening, renaming or deleting existing recipes.



Each recipe belongs to a **Recipe Group**. You can think of Groups as "folders" and recipes as "documents" within those folders. You create groups and name them any way you like to help organize your recipes.

MyRecipes provides 2 views, selected by clicking the appropriate tab:

**Organize by Group:** This view (example above) shows the hierarchy of groups and recipes. You can create new groups, or rename existing groups.

To move a recipe to a different group, just drag and drop it onto the group's folder icon. Or use the **Move Recipes** button to move several recipes at once.

**View as Sortable List:** The list view helps you compare recipe costs.

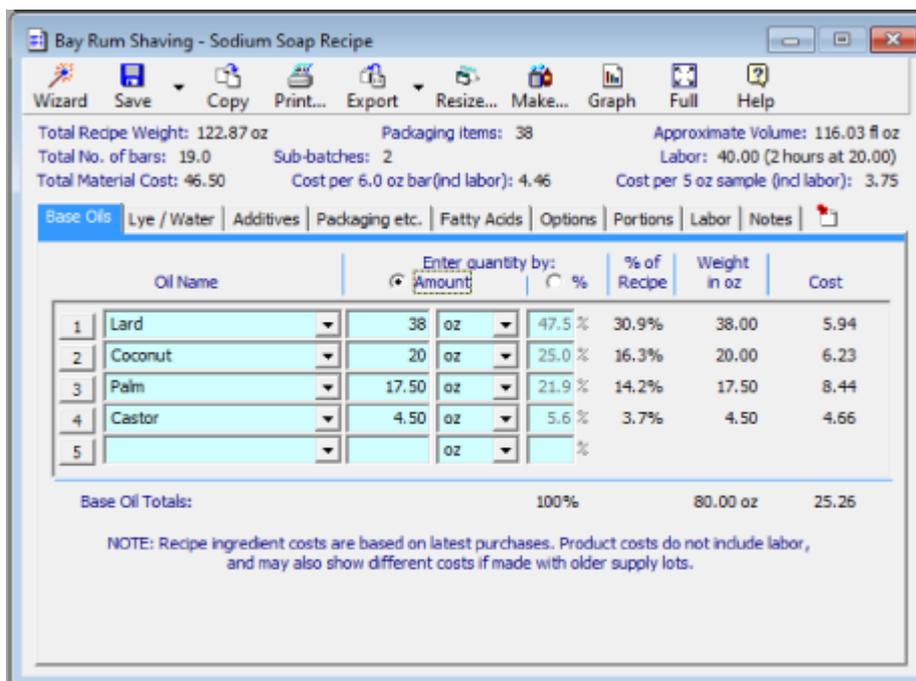
For a complete description, see the topic: [MyRecipes](#).

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## Recipe Form Introduction

To create a new recipe, or view an existing one, you open a **Recipe Form** from MyRecipes...

The Recipe form differs somewhat based on the recipe type. This example is a Sodium Soap recipe (made with Sodium Hydroxide lye):



At the top of the form is a **toolbar** with several buttons. Hover your mouse cursor over any button to see a pop-up description of what the button does. The pop-out **Wizard** will guide you through the process of creating a new recipe.

At the top, just below the toolbar, is a **summary** area which displays total weight, cost, etc.

Separate **tabs** are provided for the different ingredient types, as well as other controls and information associated with the recipe. Click a tab to view a particular page...

- Base Oils** The saponifiable fats and oils which form the base of your soap
- Lye / Water** For soap recipes, the Lye and Water quantities are calculated automatically from the Base Oils you enter.
- Additives** All ingredients which are not saponified such as scents and colors.
- Packaging etc.** Non-ingredient items included with your products, such as wrappers, labels, and bottles.
- Fatty Acids** If you are interested in chemistry, this tab lists the fatty acid composition resulting from the recipe's blend of Base Oils. The **Predicted Qualities** shown on the [graph](#) are derived from these.
- Options** This page enables you to select the units you prefer (e.g. ounces or grams), and other settings. You can set them for this recipe only, or save them as the default options for all new recipes of the same type.
- Labor** If desired, you can enter the estimated labor-hours and your labor rate. This will then show the labor cost per bar/portion made in your [Price List](#) to help you set prices with a satisfactory profit margin.
- Notes** Here you can record any notes about this recipe.

You enter ingredients by selecting from the drop-down list of available ingredients, or by typing the name. Before you can use an additive ingredient or packaging item in your recipes, it must be defined in MySupplies.

### Wizard

While you are learning SoapMaker, the pop-out Wizard can guide you through various tasks. To show it, click the **Wizard** button on the toolbar. To hide it, click the button again.



For a complete description of creating a recipe see [Creating a Recipe...](#)

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## Qualities Graph Introduction

### The Predicted Soap Qualities Graph

For each soap recipe, SoapMaker predicts the following qualities:

- hardness,
- lather fluffiness, (big bubbles)
- lather stability (creamy and long lasting), and
- moisturizing or conditioning.

The graph displays the qualities of any open recipe. This makes it easy to “test” a new recipe before you make the soap, and to compare different recipes with each other, and with the [benchmark](#) qualities.



For a complete description of the graph, and interpreting the numbers, see [Predicted Soap Qualities](#).

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## MyProducts Introduction

### Pro The Product Management Center

MyProducts lists all the product batches you have made, with their current status. Toolbar buttons are provided for recording new **sales**, and viewing various **reports**.

The screenshot shows the 'My Products' window with a toolbar and a detailed view of 'Batch 2: Recipe: Pink Lilac'. The main area is divided into a left sidebar for filtering, a central detail panel, and a bottom table.

| Batch | #SubBatches | Product Description | Recipe              | Date Y-M-D | Ready   | Made | Gone | Left |
|-------|-------------|---------------------|---------------------|------------|---------|------|------|------|
| 1     | 2           | Smooth Shave        | Bay Rum Shaving     | 2017-05-10 | Yes     | 32   | 16   | 16   |
| 2     | 3           | Sweet Spring        | Pink Lilac          | 2017-05-10 | Yes     | 30   | 10   | 20   |
| 3     | 1           | Oatmeal Exfoliating | Oatmeal Exfoliating | 2018-01-03 | 23 days | 23   | 11   | 12   |
| 4     | 1           | Oatmeal Exfoliating | Oatmeal Exfoliating | 2018-01-03 | 23 days | 23   | -    | 23   |

Summary statistics at the bottom of the table:  
 Total Batches: 5  
 Number shown: 5  
 Total Value: \$33.68  
 Totals: 131 Made, 37 Gone, 94 Left

Below the main toolbar there are 3 main areas in MyProducts:

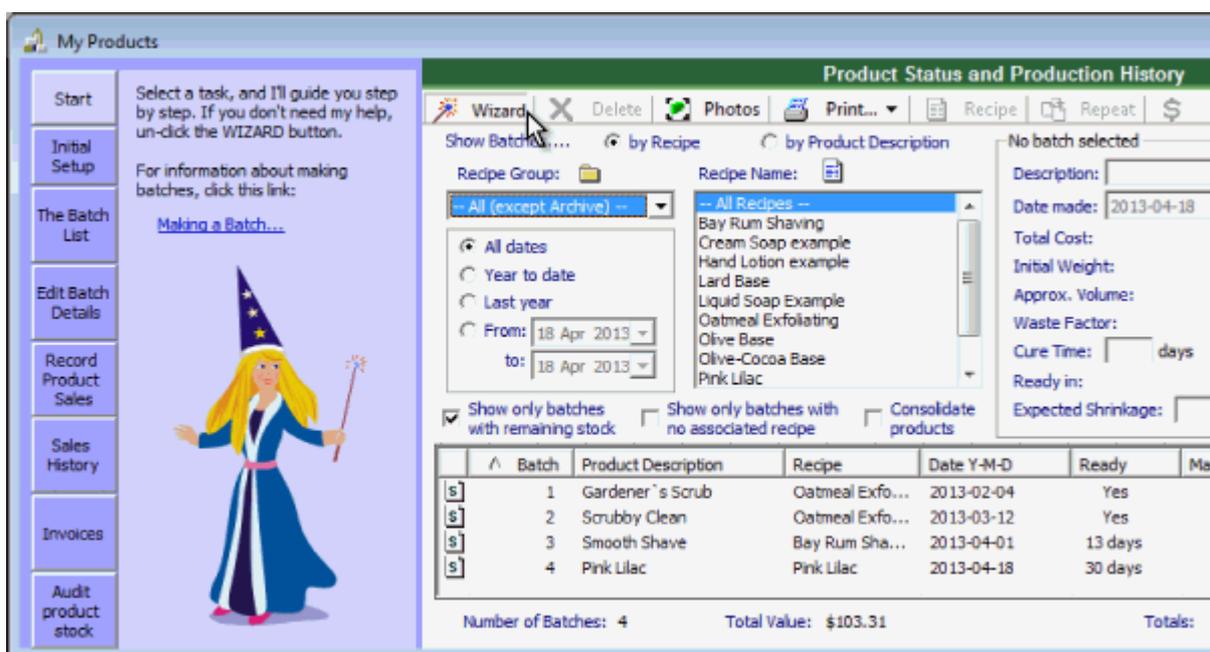
1. At the bottom is the **Batch List**, which shows summary information and status of each product batch

you have made, and totals for the list.

2. At the upper left are **Selection Criteria** which determine which batches are displayed in the list. You can view batches made with a particular **recipe**, with all recipes in a particular **group**, or all recipes in all groups. Or you can choose to view batches by Product Descriptive name instead of by recipe name. You can also restrict the list to only batches within a certain **date range**, and show only batches with some **unsold stock**.
3. When you select a batch in the list, the **Batch details** are shown in the upper right area. You can use the buttons here to record **sales**, or to make changes to the batch details or notes by clicking the **Edit** button.

## Wizard

While you are learning SoapMaker, the pop-out Wizard can guide you through various tasks. To show it, click the **Wizard** button on the toolbar. To hide it, click the button again.



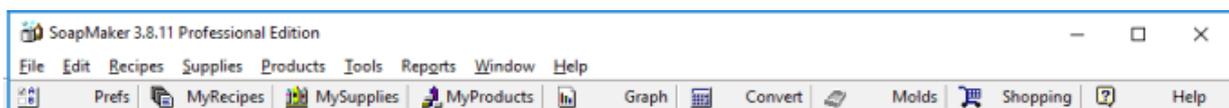
For a complete description see [MyProducts](#).

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## Menus

### The Main Menus

The main SoapMaker window contains a **menu bar** at the top, which provides access to all the main commands.



This is a complete list of the available commands under each menu:

### File Menu

**New Recipe** - Opens the New Recipe dialog so you can select the type of recipe you want to create.

**Open Recipe** - Opens [MyRecipes](#) so you can select a recipe to open.

**Save** - This menu item is available whenever you are working in a window which has a Save button or command.

**Save Recipe As...** - Save a copy of the current recipe with a different name.

**Import/Export Recipe...** You can export a recipe as a text file, which can then be imported by another SoapMaker user.

**Export...** - This menu item is available whenever you are working in a window which has an Export function.

---

**Backup Data and Shut down** - Makes a backup copy of your [database](#), then closes the program.

**Backup Data and Restart** - Makes a backup copy of your [database](#), then restarts the program.

**Restore Data** - Replaces the current database with a saved backup copy.

---

**Database...** Provides access to the following special commands for managing your database:

**Compact & Repair Database** - Use this if you suspect database problems. ([more info...](#))

**Pro Move/Share Data** - Enables you to move your database to a public location for sharing with another user or computer.

**Import Database from Version 2** - Use this once if you are updating from SoapMaker 2.x

**Clear Database** - Use this once to remove sample data before entering your own.

**Revert to Samples** - Replace all data with the sample data that was originally installed with the program.

---

**Print...** - This menu item is available whenever you are working in a window which has a Print command.

**Printer Setup** - Override your system default printer setting to select a different printer or page size before printing, or to change from portrait to mode (may be needed for wide reports).

**Recent Recipes** - The 4 most recently open Recipes are listed here for easy access.

---

**Close Window** - Closes the currently active (frontmost) sub-window you are working on.

**Exit** - Closes the SoapMaker program.

## Edit Menu

**Cut** - Removes the selected text and places it on the clipboard.

**Copy** - Copies the selected text and places it on the clipboard.

**Paste** - Inserts text from the clipboard.

## Recipes Menu

**Show/Hide MyRecipes** - Opens or closes [MyRecipes](#)

**Show/Hide Qualities Graph** - Opens or closes the [Qualities Graph](#)

**Update Recipes...** - Updates any recipes requiring it to reflect the latest supply costs

**Open a Copy** - Opens a copy of the recipe you are working on.

**Resize Recipe...** - Opens the [Resize Recipe](#) dialog.

**Add to/Remove from Graph** - The current recipe is added to (or removed from ) the [Qualities Graph](#).

**Set as Benchmark** - Use the current recipe's quality numbers for the graph [benchmark](#).

**Full Screen** - Check this to switch the currently open recipe to Full Screen mode instead of tabbed pages.

**Pro Make a Batch...** Make a new batch of products with the current recipe.

## Supplies Menu

**Show/Hide MySupplies** - Opens or closes [MySupplies](#)

**Record New Purchase...** Opens the [New Supply Purchase](#) form.

**Supplier List** - Opens the [Suppliers List](#)

**Merge Oils** - [Merge](#) a custom oil with one of the standard oils provided with SoapMaker

### Pro Blends...

**New Blend Formula** - Open a new blank Blend form ready to create a new blended ingredient

**Open Blend Formula** - Open the formula for the currently selected blend in MySupplies stocklist

**Make Blend or Infusion** - Make more of the selected blended ingredient

## Pro Products Menu

**Show/Hide MyProducts** - Opens or closes [MyProducts](#)

**Record Sales/Create Invoice** - Opens the [Sales Register/Invoice](#) form

**Customers and Venues** - Opens the [Customers and Venues](#) list

**Price List** - Opens the [Price List](#) for editing or printing

## Tools Menu

**Preferences** - Opens the [MyPreferences](#) dialog

**Conversion Calculator** - Opens the [Units Conversion](#) calculator

**Show/Hide MyMolds** - Opens or closes your [List of Molds](#)

**Compare Oil Qualities** - Opens the [Base Oil Qualities](#) list

**Pro Shopping List** - Opens the [Shopping List](#) planning tool

**Pro Product Photos...** - Opens the Product Photo for the selected batch

## Reports Menu

**Supply Orders Report** - Opens the list of [Supply Orders](#)

**List of All Purchases** - Opens the [All Purchases](#) list

**Purchase History for Selected Item** - Opens the [Purchase History](#) report

**Pro Usage History for Selected Item** - Opens the [Supply Usage](#) report

**Sales History (all Batches)** - Opens the [Sales History](#) report

**Supply Lots Used** - Opens the [Supply Lots Used for Batch](#) report

**Invoices and Venue Sales Records** - Opens the list of [Sales Registers and Invoices](#)

**Pro Tax and Income Summary** - Opens the [Tax and Income Summary](#) report

## Window Menu

**Arrange Icons** - If you have minimized sub-windows within the SoapMaker main window, this command will arrange them along the bottom edge of the main window.

**List of open Sub-Windows** - All currently open sub-windows are listed here. The currently active (frontmost) window has a checkmark beside it. You can make any window active (bring it to the front) by selecting it here.

## Help Menu

**Users Manual** - Opens the Users Manual at the topic 'Document Organization'.

**Frequently Asked Questions** - Opens the manual at the 'Q and A' section

**Tip of the Day** - Displays the next daily tip.

**Online Support** - Opens your default browser and connects to the SoapMaker website 'Support' page.

**Check for Updates** - Checks online to see whether there is a more recent version available

**View Release Notes** - Displays the latest update release notes describing recent changes to SoapMaker

**About SoapMaker...** - Displays information about your SoapMaker version and registration.

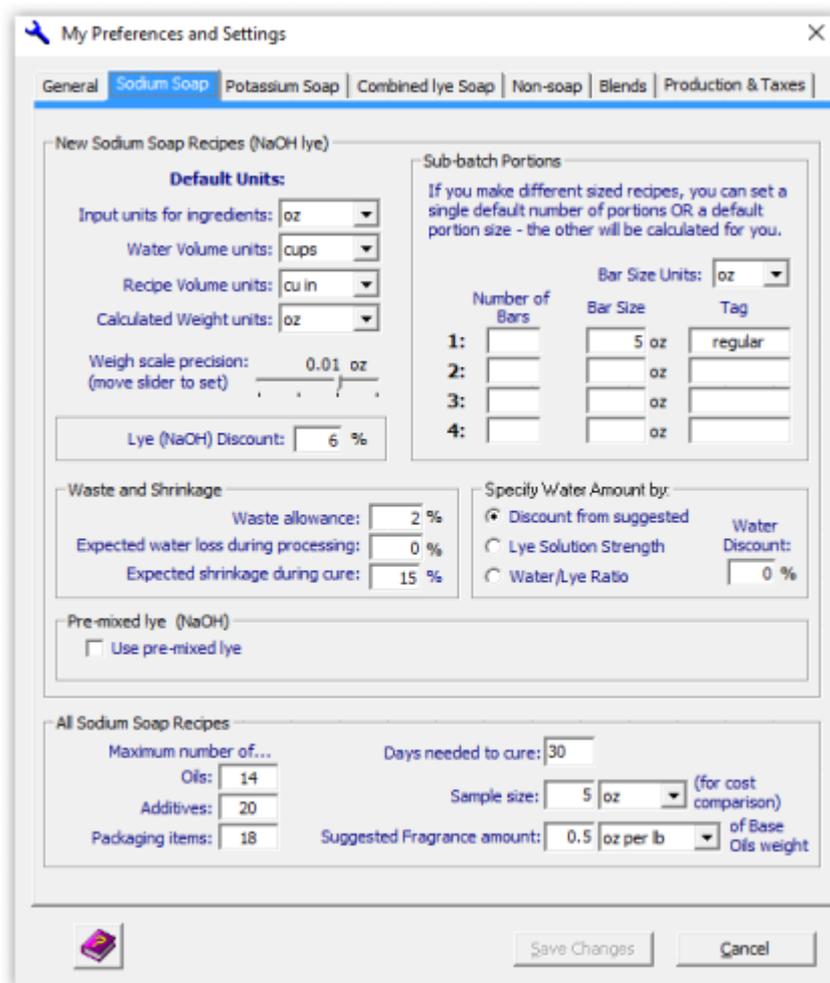
**Upgrade to Professional edition...** - (Appears only with the **Lite** edition)

[<< Previous topic](#)   [Next topic >>](#)

## Customizing SoapMaker

Customize SoapMaker by setting your preferred options in **MyPreferences**.

Several **tabs** are provided for different settings, including a tab for each recipe type. Shown here is the "Solid Soap" tab.



The settings you make here provide the [default](#) options when you open a recipe. You can override them in a particular recipe, or change the default preferences from within the recipe form.

For a complete description, see [MyPreferences](#).

[<< Previous topic](#)   [Next topic >>](#)

## Explore

### Explore and Learn

This completes the **Getting Started** section.

Now you can explore the many features of SoapMaker 3 using the examples included.

**IMPORTANT:** When you are ready to begin entering your own ingredient data, recipes, and products, see the topic [Initial Setup](#) for step-by-step instructions to enter your data in the correct sequence - this will avoid problems later.

While you are learning how to use the program, remember that you can...

- hover over a button or tab to see a pop-up **description** of its function
- use the pop-out **Wizards** on major windows for guidance
- click any **?** button to get **Help** with the current task
- find Help topics using:

- the Help **Contents**
- the Help **Index** of keywords
- **Search** for any word or phrase
- access the SoapMaker website [knowledge base](#).

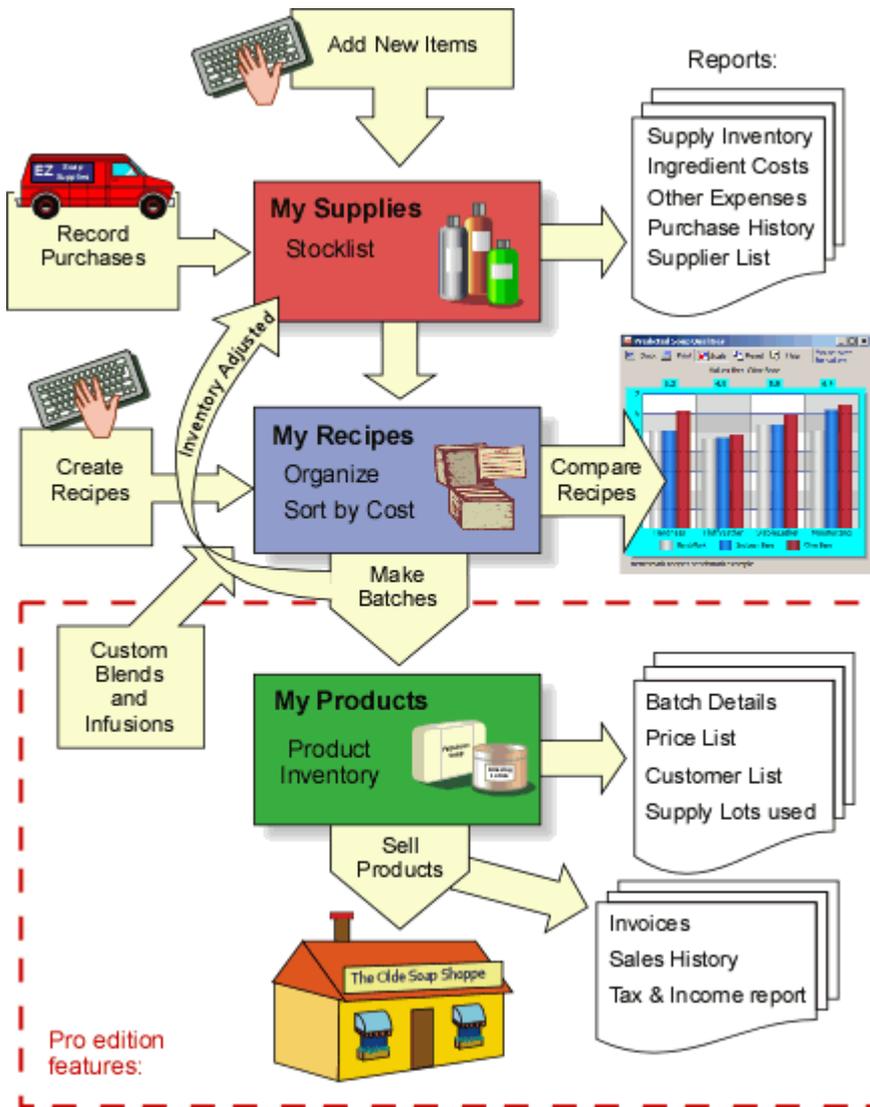
[<< Previous topic](#)    [Initial Setup: Entering your data >>](#)

## Management centers

---

Most of your activity with SoapMaker revolves around the 3 Management Centers:

**MySupplies**, **MyRecipes** and **Pro MyProducts**...



For a complete description of each Management Center see:

[MySupplies](#)

[MyRecipes](#)

[MyProducts](#)

## MySupplies

### Ingredients and Packaging - Overview

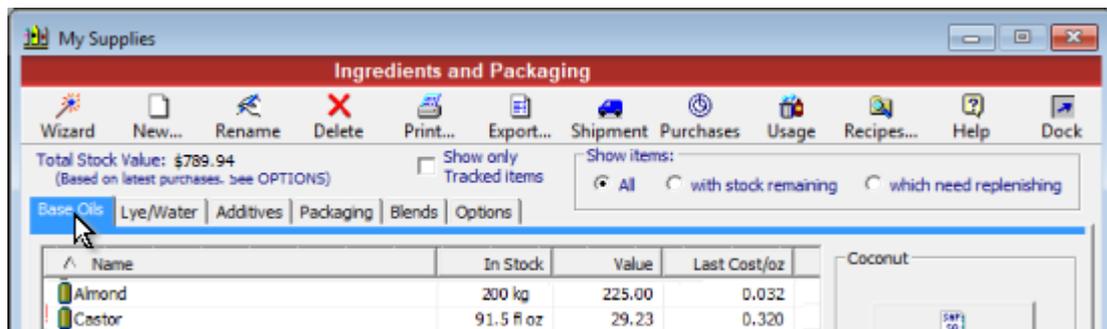
**MySupplies** shows a stocklist of all your ingredients and packaging items, and provides commands for adding new items to the list and recording new shipments or purchases. Before you can record supply purchases or create recipes, you need to define your ingredients in MySupplies - for help with this, see the topic [Defining Supply Items...](#)

To open MySupplies, or bring it to the front if it's already open, click the **MySupplies** button on the main toolbar.

At the top of the MySupplies window is a toolbar with buttons for all the commands related to your supplies.

You can move MySupplies by dragging the top. You can resize it by dragging a corner or edge. SoapMaker will remember the size and location the next time you open it. Click the **Dock** button to position it in the upper right corner of the main window.

**Pro** The current total value of all your stock of supplies is shown below the toolbar. You have the option to base your stock value either on the **current market value** (based on your latest purchase of each type), or on the **actual cost** paid for each lot purchased.



### Tabs

Supplies are divided into 4 types. Clicking the appropriate tab shows the stocklist for a particular supply type (Click a supply type name in the following table for more information):

- Base oils:** These are the saponifiable oils and fats which form the base of your soap recipes
- Lye and Water:** NaOH and KOH lye, and water
- Additives:** Ingredients such as scents and colorants, or anything else which is not a base oil.
- Packaging:** Items like bottles, labels, boxes, jars, etc. which you use to package your products.

There are also tabs for creating and managing [Blends](#), and for setting [Options](#).

### Commands

To access the various commands available in My Supplies, either select a stocklist item and click the appropriate **toolbar button**, or right-click and select a command from the **pop-up menu**.

The following commands are available from the toolbar:

- Delete** Permanently delete the selected item. Any purchase records for this item will also be deleted.

Note: You will not be allowed to delete an item if it is used by any saved recipes, unless you first delete the affected recipes.

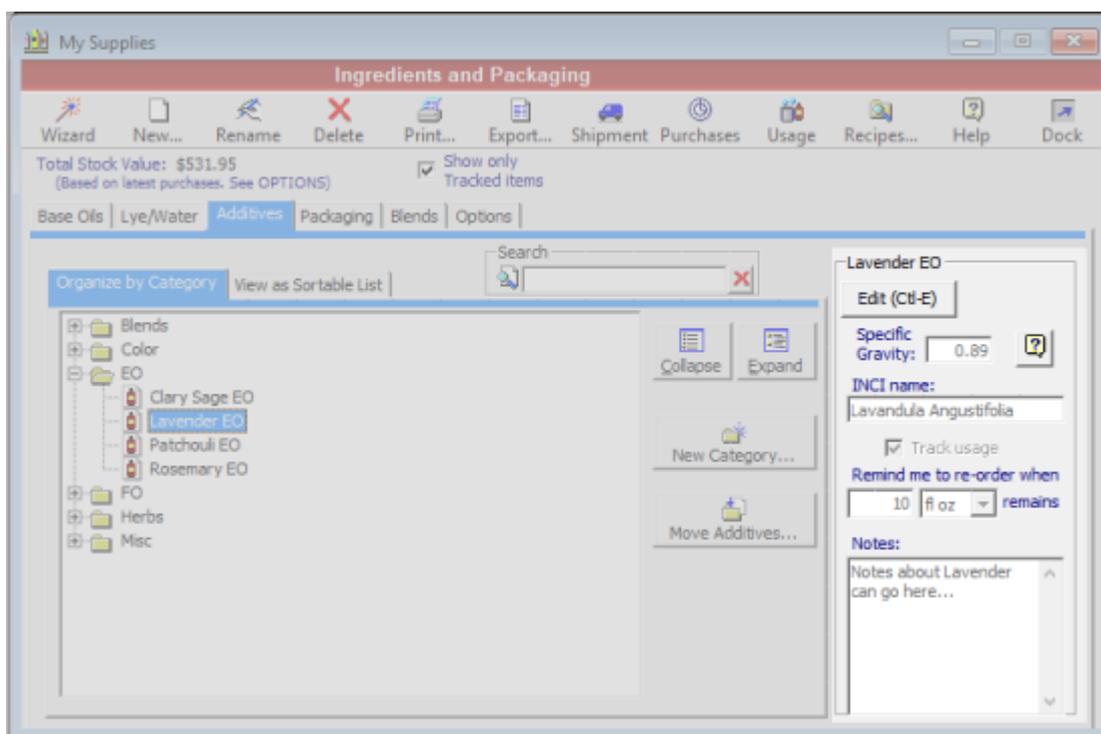
|  |   |
|--|---|
| <b>Dock</b>  | Place MySupplies window on the right side of the main window, and expand down to use available space.   |
| <b>Export <span style="background-color: yellow;">Pro</span></b> | Exports the entire stocklist as a <a href="#">CSV</a> text file which can be imported to a spreadsheet or accounting program. You have the option to export a <b>summary list</b> like that displayed, or a <b>detailed list</b> showing all purchase records with stock remaining. The detailed list includes supplier name, purchase dates, lot numbers and expiry dates. (For more information, see the topic <a href="#">Exporting reports.</a> ) |
| <b>Help</b>  | Opens the appropriate Help page.  |
| <b>New</b>   | Create a new item which can be used in recipes, and tracked in MySupplies.  |
| <b>Print</b>   | Print the displayed list, all 4 stocklists, or a list of all purchased lots with stock remaining  |
| <b>Purchases</b>   | Display <a href="#">history of all purchases</a> of the selected item. (For a blended ingredient, the 'Production History' will show batches made from this blend formula. <span style="background-color: yellow;">Pro</span> )   |
| <b>Recipes</b>   | Display a list of all saved recipes which use the selected item.  |
| <b>Rename</b>  | Allows you to edit the name of a supply item (or an additive category).   |
| <b>Shipment</b>  | <a href="#">Record Purchases</a> of new supplies (or make a new <a href="#">blend batch</a> <span style="background-color: yellow;">Pro</span> )  |
| <b>Usage <span style="background-color: yellow;">Pro</span></b>  | List product batches made with the selected item, showing the date, product made, and quantity used.  |
| <b>Wizard</b>  | Provides step by step guidance with common tasks.   |

Additional commands are available from the main **Supplies** and **Files** menus, or from pop-up menus:

|  |  |
|--|--|
| <b>Supplier List</b>   | You can maintain a <a href="#">list of suppliers</a> with contact information.   |
| <b>Merge Oils</b>  | If you have previously created a custom oil, but SoapMaker now includes a standard version of the same oil, you can <a href="#">merge</a> all the existing data from your custom oil into the standard one, and dispense with the custom oil.          |
| <b>Supply Orders Report</b>                                      | Displays a list of all <a href="#">supply orders</a> you have recorded, showing the contents of each.  |
| <b>Blends <span style="background-color: yellow;">Pro</span></b> | <p><b>New Blend Formula</b> - Create a new blend on any page of MySupplies.</p> <p><b>Open Blend Formula</b> - Open the formula for a selected blended oil or additive.</p> <p><b>Make Blend or Infusion...</b> - Make more of the selected blend.</p> |

## Item Specifications

Each supply item has specifications that are displayed beside the list when the item is selected.



In this example, Lavender Essential Oil is selected, and you see:

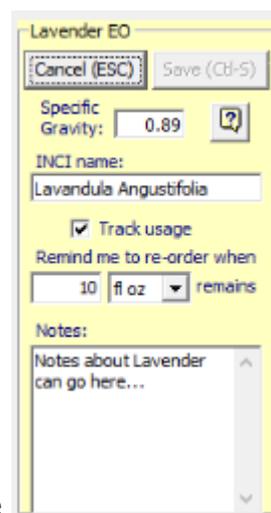
- the **Specific Gravity**
- the **INCI name**
- that it's inventory is being **Tracked Pro**
- A **low stock** icon will be shown when the remaining stock is less than 10 fluid ounces **Pro**
- There are **Notes** saved about this item

To make changes to any of these specifications, click the **Edit** button or press Ctrl-E on your keyboard - the specifications area will be highlighted as shown here. If you change any values, the **Save** button will be enabled.

You can click the **Save** button to save your changes, or **Cancel** if you decide not to change anything - this will restore the previous values.

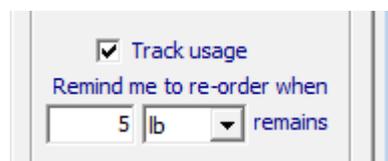
If you are unsure about specific gravity, click the **?** button for help.

Note: While you are editing an item's specifications, all other controls (except the HELP button) are disabled.



### Pro Tracking Usage

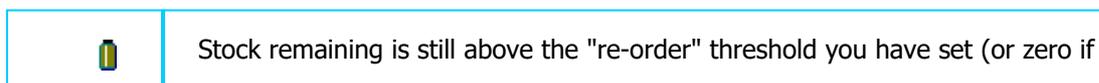
For each supply item, you can choose whether you want to **track usage**. If you check this box, then MySupplies will display the Stock quantity and its value, and each time you [make a batch](#) with a recipe which includes this ingredient, the **In Stock** quantity will be adjusted to reflect the amount used. When you purchase more, the quantity will be increased to include the new purchase.



Note: if you have any stock in your inventory, **track usage** is automatically turned on - you cannot turn it off unless there is no stock. To provide an untracked item with a unit cost, record a purchase and mark it **Not for Business**.

If desired, you can enter a quantity which will trigger an indication when stock falls below that value. This indicator is a special icon shown at the left of the stocklist, and in the [New Batch](#) dialog.

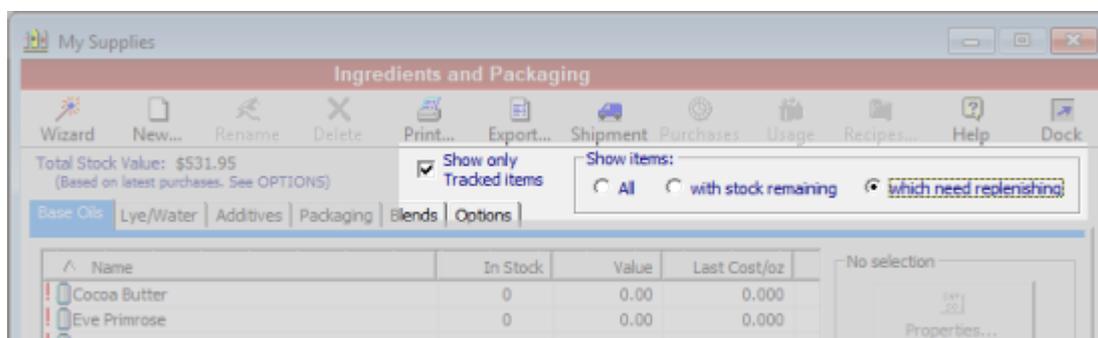
Icons displayed beside each item provide a quick indication of the status of that item's stock similar to this:



|  |  |
|--|--|
|  | none set)  |
|  | Stock is getting low - shows if you have set a non-zero threshold, and stock has dropped to that value.  |
|  | No Stock remaining!  |
|  | This item is not being tracked. No stock quantity or value is shown. A unit cost will show if you have recorded a purchase marked <b>Not for Inventory</b> .   |
|  | Expired! Some of this stock has passed it's expiry date. You can set your preference to see this warning any number of days <b>before</b> the expiry date is reached - see <a href="#">MyPreferences</a> . |

For further details, see the topic for each supply type.

### Pro Display Options



You can choose to display only **Tracked** items or all items whether tracked or not.

In addition, you can restrict the display to:

- items which need **replenishing** (i.e. the In Stock quantity is less than or equal to the threshold quantity you have entered), or
- items with stock **remaining** in inventory

Note: The **Total Stock Value** amounts for each supply type, and for your entire stock, will always include the value of all **tracked** items, whether the items are displayed or not.

### Notes Area

For each stock item in MySupplies, you can record notes about that ingredient. Just click the item to select it, then click in the **Notes** area and type whatever you want.

### Shortcuts

Double-click an item in a stocklist to open the [New Supply Purchase form](#) and record a new shipment of supplies or a single purchase. (For blended ingredients, double-clicking will open the blend formula so you can use the **Make Blend** command to make a new batch.)

#### Keyboard shortcut Action

- Ctrl-T** Move to the next main **Tab** (Base Oil, Lye/Water, Additives, etc.)
- Ctrl-Shift-T** On the Additives or Packaging tab, switches between **Organize by Category** view and **Sortable List** view.
- Up/Down arrows** Move up or down within the displayed list.
- Left/Right** Expand or collapse a category in the Organize by Category view.

## Keyboard Action shortcut

### arrows

- Ctrl-E** Start editing an item's specifications (e.g. Notes, SG value, tracking options)
- TAB** Move to the next input field
- Ctrl-S** Save changes made to an item's specifications
- ESC** Cancel changes and exit the Edit mode

To close MySupplies, click the **X** in the upper right corner, or select **Hide MySupplies** from the main **Supplies** menu.

## More Information

For a description of each Tab on MySupplies see:

[Base Oils](#)

[Lye and Water](#)

[Additives](#)

[Packaging](#)

[Blends](#)

[Options](#)

## Related Topics

[Initial Setup](#)

[Recording Purchases](#)

[Supplies Audit](#)

[Purchase History](#)

[Suppliers List](#)

[Supply Orders Report](#)

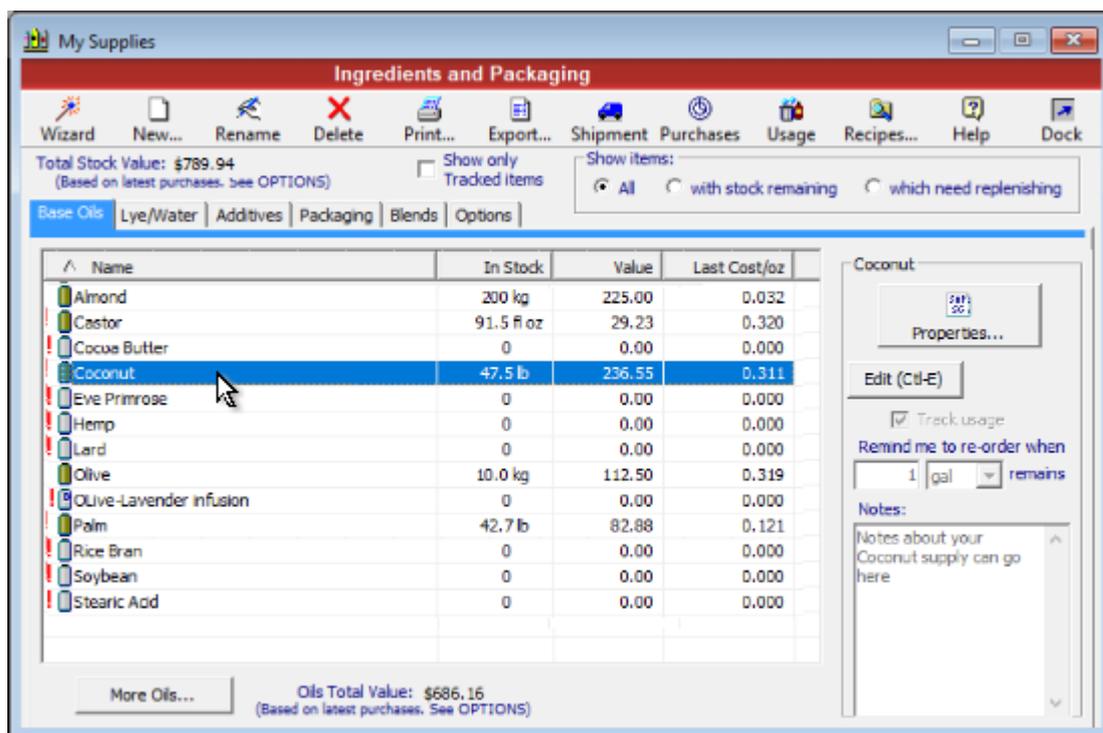
## Base Oils

In SoapMaker, the term **Base Oils** refers to the saponifiable oils and fats which form the base of your soap recipes. The Base Oils tab displays a stocklist of all the oils you use in your recipes. You can add any oils you want to this list.

## Base Oils Stocklist

The Base Oils stocklist shows the:

- **Name** of each oil
- **Last Cost** (e.g. \$/oz). This is always based on your most recent purchase of each item in whatever units you select on the **Options** tab.
- **Pro In Stock** quantity in your inventory.
- **Pro Value** of that stock quantity. You can choose whether to show stock values based on either:
  - 'current market value' (i.e. your most recent purchase of each item), or
  - actual costs of each lot purchased (See [Options](#) for choosing stock value method.)



To sort the list, click on a column header. For example to sort by value, click the **Value** header. Click again to sort in the reverse order.

## Commands

Click the **Properties** button to open the [Oil Properties](#) window for the selected oil.

SoapMaker comes with more than 80 oils from which you can choose your favorites to use in recipes and track in MySupplies. Click the **More Oils** button at the bottom of the window to open the [Favorite Oils](#) window and select additional oils from the standard ones included with SoapMaker.

You can also create your own custom oil by clicking **New** on the toolbar. You will be asked to provide the properties, or copy them from a similar standard oil.

For a list of other available commands, see [My Supplies - Overview](#)

## Pro Inventory Tracking

If an oil's **Track Usage** box is checked, SoapMaker adjusts the oil's stock quantity whenever you [make a batch](#) using a recipe with that oil. You can also enter a **threshold** amount which will trigger a reminder to order more when your stock gets low. You can enter **notes** for each item.

Icons at the left of each oil in the list indicate the current status. (Icons with a little "C" indicate this is a **custom** oil you have created, not a standard oil included with SoapMaker. Icons with a "B" indicate this is a **blended ingredient** with a related formula in the [Blends](#) list.)

|  |  |
|--|--|
|  | Stock remaining is still above the "re-order" threshold                                |
|  | Stock is getting low - it may be time to order more.                                   |
|  | No Stock remaining!  |
|  | This standard or custom oil is not being tracked. No stock quantity or value is shown. |
|  | One or more lots in this oil's stock are past the expiry date.                         |

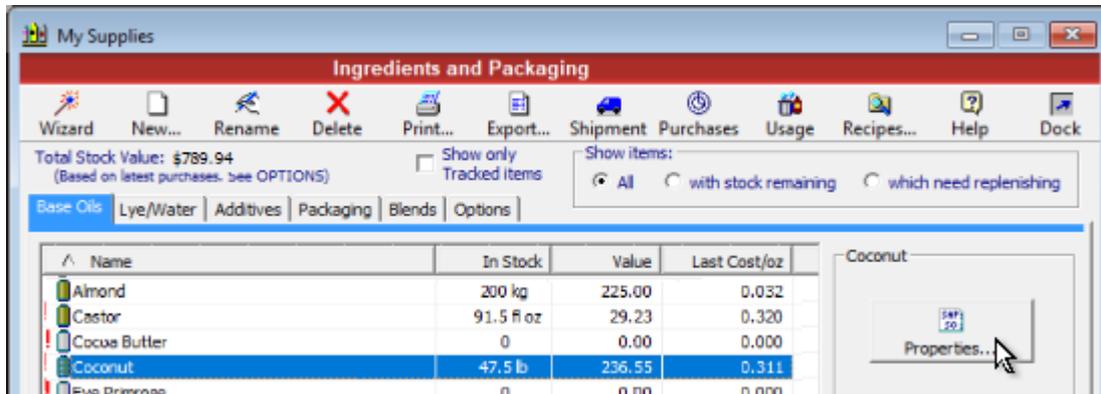
Below the list is the **total value** of all your oils in stock. (Note: If there are oils with stock remaining which are not in your [Favorites](#) list (i.e. not showing in MySupplies), their value will not be included in the total.

[<< Previous topic](#)      [Next topic >>](#)

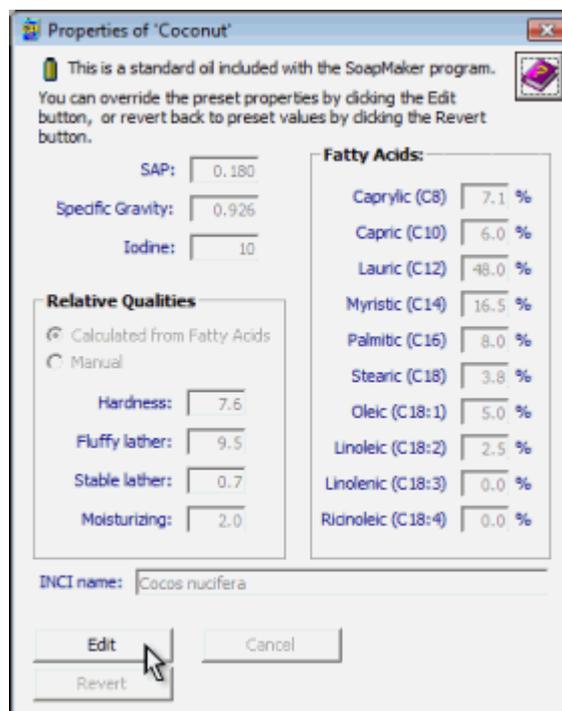
## Oil Properties

The Oil Properties window displays all the properties of a selected Base Oil.

To open **Oil Properties**, select a Base Oil in [MySupplies](#), and click the **Properties** button...



The Oil Properties window will open, and SoapMaker will attempt to locate it adjacent to the MySupplies window if there is room available.

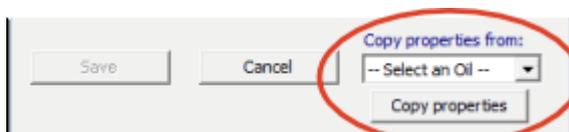


Click the **Edit** button if you want to make any changes (it changes to **Save**). When finished editing, click **Save**, or **Cancel** if you change your mind.

You can leave the **Properties** window open and select a different oil in MySupplies to display its properties.

### Standard or Custom Oil?

If this is a **standard** oil (included with the SoapMaker program), and you have made changes in the past, you have the option to click the **Revert** button. This will change all the property values back to the factory values originally provided.



If this is a **custom** oil you have entered, you can copy all the properties from a standard oil by selecting one from the list and clicking **Copy Properties**.

## Properties Summary

The key properties which are needed in order to use an oil in recipes are:

- [SAP value](#) - Used to calculate the amount of lye needed to saponify this oil
- [Specific Gravity](#) - Needed for accurate conversion between weight and volume units

The **Relative Qualities** of each oil are used to calculate its contribution to the overall [predicted qualities](#) of soap recipes. You can choose to either have these quality numbers **Calculated** (the default), or you can choose **Manual** and enter them yourself.

The quality calculation algorithm uses the **Fatty Acid** composition of the oil, as well as the **SAP value** and **Iodine** value.

The standard oil properties supplied with SoapMaker are averages from a variety of industry sources. If you have specific data for a particular oil you use which differs from the standard values, you can edit them here.

**Caution:** Industry sources specify SAP values in different ways. Before changing SAP values, be sure you understand SoapMaker's requirements. See [Understanding SAP Values](#) for more information.

## Window Management & Shortcuts

The **Oil Properties** window is intended as an adjunct to MySupplies. If one window partially obscures the other, you can move either by dragging its top.

Any Base Oil selected in the MySupplies list will have its properties displayed without having to close and re-open the Oil Properties window.

**Ctrl-S:** Save changes

To close the Oil Properties window, click the  in the upper right corner, or select **Close Window** from the main **File** menu.

## Related Topics

[Understanding SAP value](#)

[Specific Gravity](#)

[Predicted Soap Qualities](#)

[INCI Names](#)

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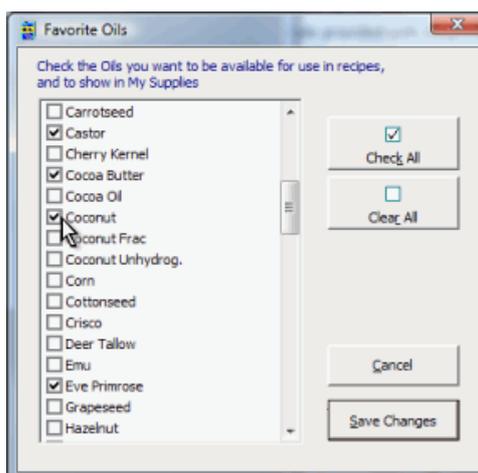
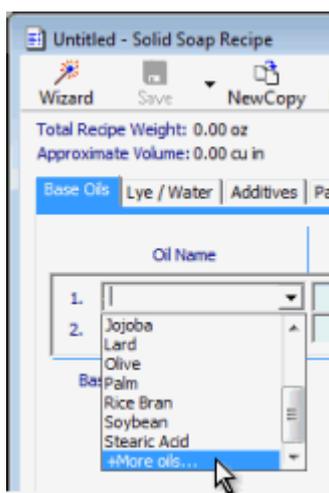
## Favorite Oils

SoapMaker includes the properties for more than 80 [Base Oils](#) used in soap making. To avoid long unwieldy lists when creating recipes, or tracking supplies inventory, you can select the subset of standard oils which you actually use to include in your **Favorites** list.

Only your **favorite oils** will appear in the MySupplies [Base Oil list](#), and in [Recipe Form](#) drop-down lists.

You can add more oils to your favorites, or remove ones you don't use at any time.

To open Favorite Oils , select the **+More Oils...** item from any Oil Name drop-down list on a [Recipe Form](#), or click the **More Oils** button on the MySupplies [Base Oil tab](#).



Check any oils you want to include, and uncheck any you want to hide. Then click **Save Changes**.

Note: You can also add oils to your favorites from the [Base Oil Qualities](#) table. To open it, select **Compare Oil Qualities** under the main **Tools** menu.

[<< Previous topic](#)      [Next topic >>](#)

## Merge Oils

If you have previously created a [custom oil](#), but SoapMaker now includes a standard version of the same oil, you can **merge** all the existing data from your custom oil into the standard one, and dispense with the custom oil.

(Note: Before merging an oil, any open recipes using the custom oil should be saved and closed.)

To merge oils, select your **custom oil** in the Base Oils list of *MySupplies*, and choose **Merge Oils...** from the main **Supplies** menu. You will be asked to select the standard oil with which you want to merge your custom oil.

When you click **OK...**

- Any purchase records for the custom oil are moved to the standard oil's records (possibly changing the value and quantity of remaining stock).
- Any saved recipes containing the custom oil are changed to show the standard oil instead. If the standard oil's SAP value or specific gravity are different from the custom oil's, affected recipes may then show slightly different quantities of lye and water, or different total weight or volume. Costs may also change if there was a more recent purchase record for the standard oil than for the custom oil.
- The custom oil is permanently deleted from the database.

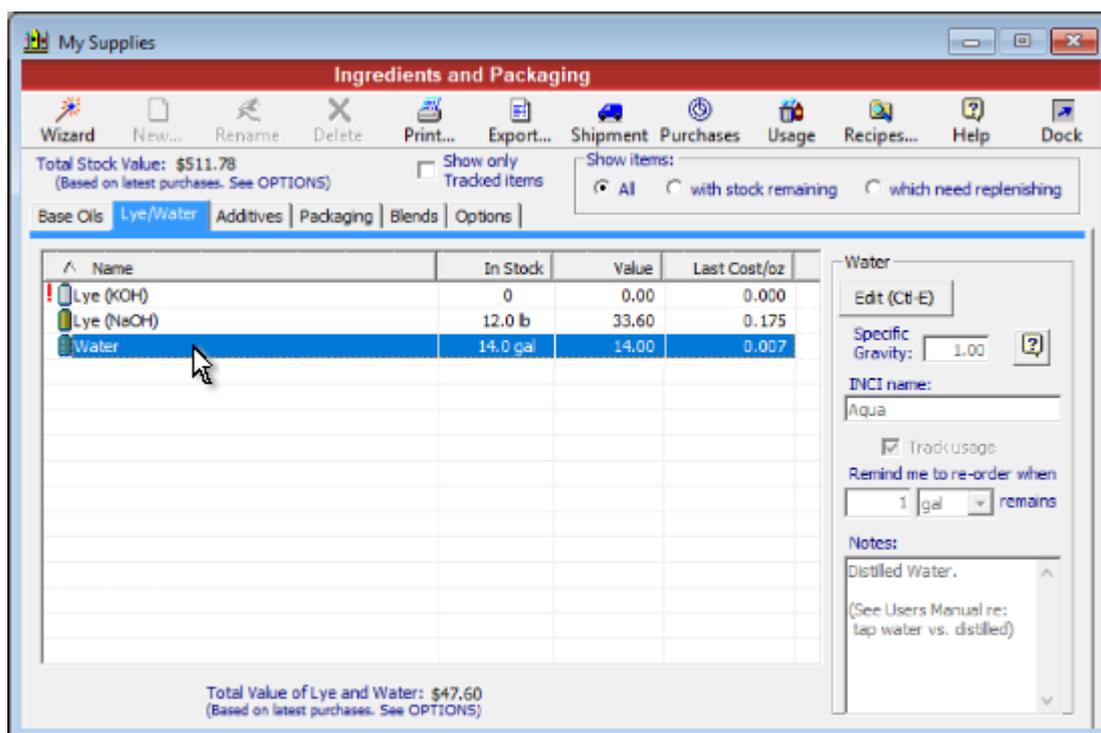
## Lye and Water

The **Lye/Water** stocklist includes water, and both kinds of lye (Sodium Hydroxide - NaOH, and Potassium Hydroxide - KOH). These are ingredients automatically included in soap recipes. Water can also be used in non soap recipes.

### Lye/Water Stocklist

The stocklist shows the:

- **Name** of each item
- **Last Cost** (e.g. \$/oz). This is always based on your most recent purchase of each item.
- **Pro In Stock** quantity remaining in stock.
- **Pro Value** of that stock quantity. You can choose whether to show stock values based on either:
  - 'current market value' (i.e. your most recent purchase of each item), or
  - actual costs of each lot purchased (See [Options](#) for choosing stock value method.)



For a list of available commands, see [My Supplies - Overview](#)

### Distilled Water or Tap Water?

If you usually purchase **distilled water** for use in soapmaking, then use the **Water** item in this list to track your distilled water stock. (If you also use tap water in some recipes, create an **additive** called "tap water".)

If you usually use **tap water** in your soap, uncheck the **Track Usage** box since you do not have a water "inventory". Click the **Shipment** button to record a single "purchase" of tap water to reflect the unit cost you pay for water, and be sure to mark it **Not for Inventory**. (If you also use distilled water in some recipes, you can create an additive called "distilled water".)

For more information, see the topic [Distilled vs. Tap Water...](#)

### Pro Inventory Tracking

If an ingredient's **Track Usage** box is checked, SoapMaker adjusts the stock **quantity** whenever you [make a batch](#) using a recipe with that ingredient. You can also enter a **threshold** amount which will trigger a reminder to order more when your stock gets low. You can enter **notes** for each item.

Icons at the left of each item in the list indicate the current status:

|  |  |
|--|--|
|  | Stock remaining is still above the "re-order" threshold              |
|  | Stock is getting low - it may be time to order more.                 |
|  | No Stock remaining!  |
|  | This item is not being tracked. No stock quantity or value is shown. |
|  | One or more lots in this item's stock are past the expiry date.      |

Below the list is the **total value** of your lye and water stock.

### Specific Gravity

The [specific gravity](#) water is pre-set in SoapMaker and cannot be changed. The values for lye are also pre-set and changing them is not recommended!

## INCI Name

The [INCI names](#) of lye and water are pre-set in SoapMaker.

[<< Previous topic](#)      [Next topic >>](#)

### Pre-Mixed Lye

#### Tracking Pre-Mixed Lye in MySupplies

There is no "pre-mixed" lye ingredient on MySupplies, so if you pre-mix quantities of lye solution, then the inventory of dry lye and water must be tracked separately.

When you [Make a Batch](#) with a recipe using pre-mixed lye, your inventory of both Lye and Water (if **Track Usage** is checked) will be deducted to reflect the amount of pre-mixed lye in your recipe.

#### Purchasing Pre-Mixed Lye

If you purchase lye in liquid form (already pre-mixed), then when you record the purchase you need to separate the quantities of lye and water, and if you normally pay for and track water usage, you will also need to split the pre-mix purchase price accordingly. For accuracy, specify the quantities in **weight** units, not volume.

To convert from a solution strength to a ratio of weights, use this formula:

Lye Weight = Solution Strength x Total Weight

For example if you purchase 30 lbs of 33% lye solution, then the proportions by weight are:

Lye Weight = 33% x 30 = 10 lb

Water Weight = 67% x 30 = 20 lb

Record the lye solution purchase as follows...

- If you do **not** track water usage, then record the **total** purchase price for lye, but specify the lye quantity as 10 lbs. (33% of the total).
- If you **do** track water usage, then record the water purchase quantity as 20 lbs, and the price as your usual price for that amount of water. Record the lye purchase quantity as 10 lbs, and the lye price as the total solution price minus the water portion.

#### Caution!

It is important to store your pre-mixed lye solution tightly covered to prevent water evaporation which would increase the solution strength. If you use pre-mixed lye in a recipe and the actual lye:water ratio is higher than that specified in the recipe, your soap will have excess lye.

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## Additives

In SoapMaker, the term **Additives** refers to all other ingredients besides Base Oils, and Lye or water. Additives include any non-saponifiable ingredients you can use in soap recipes or non soap recipes.

Since you may have many different kinds of Additives, they are organized into **Categories** for ease of entering them in recipes. You create your own Categories and Additive names. SoapMaker comes with a few examples which you can use or delete. You can create new Categories or rename existing Categories, and easily organize your Additives as you wish.

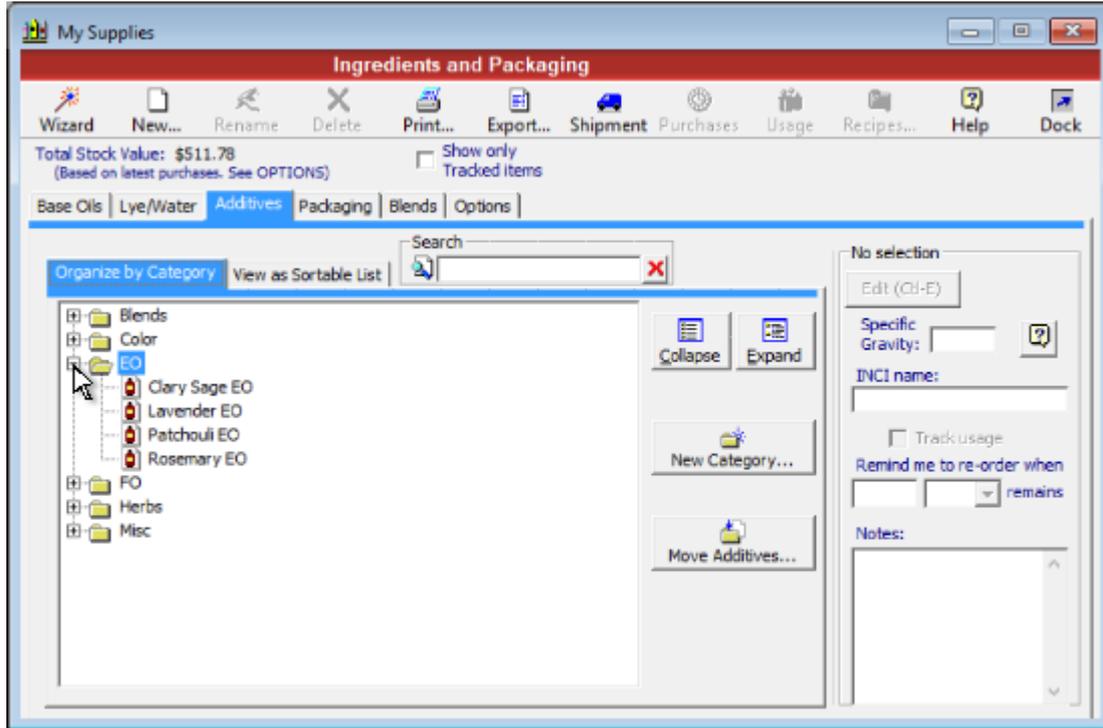
## Two Views

MySupplies provides 2 views for Additives, selected by clicking the appropriate tab:

### Organize by Category:

This view shows the hierarchy of Categories and Additives, which can be expanded or collapsed by double-

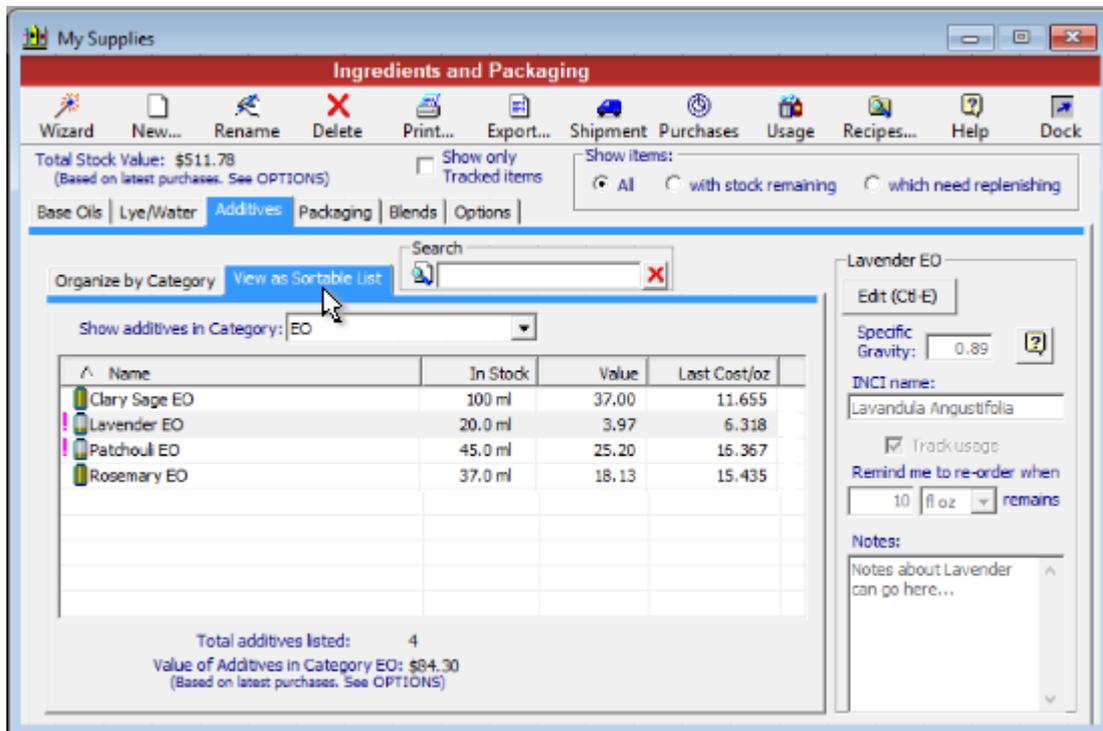
clicking a Category name, clicking the **+** or **-** signs, using the keyboard left/right arrows, or using the **Collapse** and **Expand** buttons. You can create new Categories, or rename existing Categories.



To move an Additive to a different Category, just drag and drop it onto the Category's folder icon. Or use the **Move Additives** button to move several Additives at once.

**View as Sortable List:**

Select the Category (or "All Categories") from the drop-down list.



The stocklist view shows the:

- **Name** of each item
- **Last Cost** (e.g. \$/oz). This is always based on your most recent purchase of each item.
- **Pro In Stock** quantity remaining in stock.

- **Pro Value** of that stock quantity. You can choose whether to show stock values based on either:
  - 'current market value' (i.e. your most recent purchase of each item), or
  - actual costs of each lot purchased (See [Options](#) for choosing stock value method.)

To sort the list, click on a column header. For example to sort by value, click the **Value** header. Click again to sort in the reverse order.

Below the list, you can see the total **number** of names listed, and their total **value**.

### Search Box

To find a particular additive quickly, just start typing any part of its name in the **Search** box. To clear the search, click the **X** next to the box.

### Pro Inventory Tracking

If an Additive ingredient's **Track Usage** box is checked, SoapMaker adjusts the stock **quantity** whenever you [make a batch](#) using a recipe with that ingredient. You can also enter a **threshold** amount which will trigger a reminder to order more when your stock gets low. You can enter **notes** for each item.

if you don't want to track stock of an item (e.g. herbs from your garden) but want it to have a cost showing in recipes and products, record a 'purchase' of any quantity to set the unit cost, and be sure to mark it **Not for Business** on the purchase form - this will keep it from being treated as inventory.

Icons at the left of each item in the list indicate the current status. (Icons with a "B" indicate this is a **blended ingredient** with a related formula in the [Blends](#) list.)

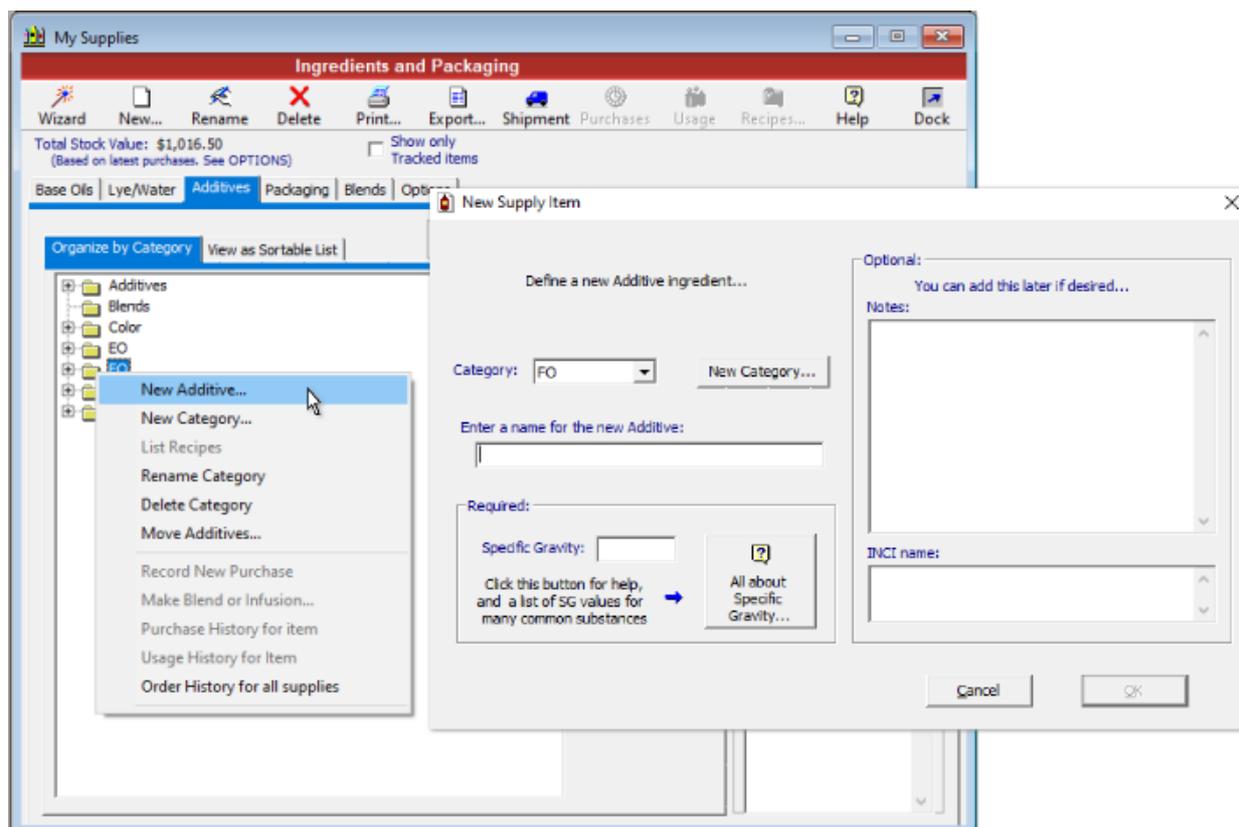
|   |  |
|---|--|
|    | Stock remaining is still above the "re-order" threshold              |
|    | Stock is getting low - it may be time to order more.                 |
|   | No Stock remaining!  |
|  | This item is not being tracked. No stock quantity or value is shown. |
|  | One or more lots in this item's stock are past the expiry date.      |

Below the list is the **total value** of all Additives in the selected **Category**.

### Defining a new Additive Ingredient

Before using a new Additive ingredient in your recipes, or recording a purchase, you need to **define** the Additive in MySupplies as follows:

1. With MySupplies open, select the **Additives** tab, then click the **New** button on the toolbar (or right-click a category and choose **New Additive** from the pop-up menu). The New Additive Ingredient dialog window will open:



2. Choose the Category from the drop-down list if you didn't select one before opening the dialog, or click the **New Category** button to create a new one.
3. Enter the name for your new additive.
4. Enter the [specific gravity](#). (If you don't know what this is, click the **All about Specific Gravity** button beside it.)
5. If desired, you can enter the **INCI name**, and any **notes** about this new additive. Or you can leave these blank and fill them in later.
6. Click **OK**.

### INCI Name

If you are required to display [INCI names](#) of all your product ingredients, you can specify the INCI name of each new Additive you create, and it will be included with any recipe using the ingredient.

For a list of available commands, see [My Supplies - Overview](#)

[<< Previous topic](#)      [Next topic >>](#)

### Packaging

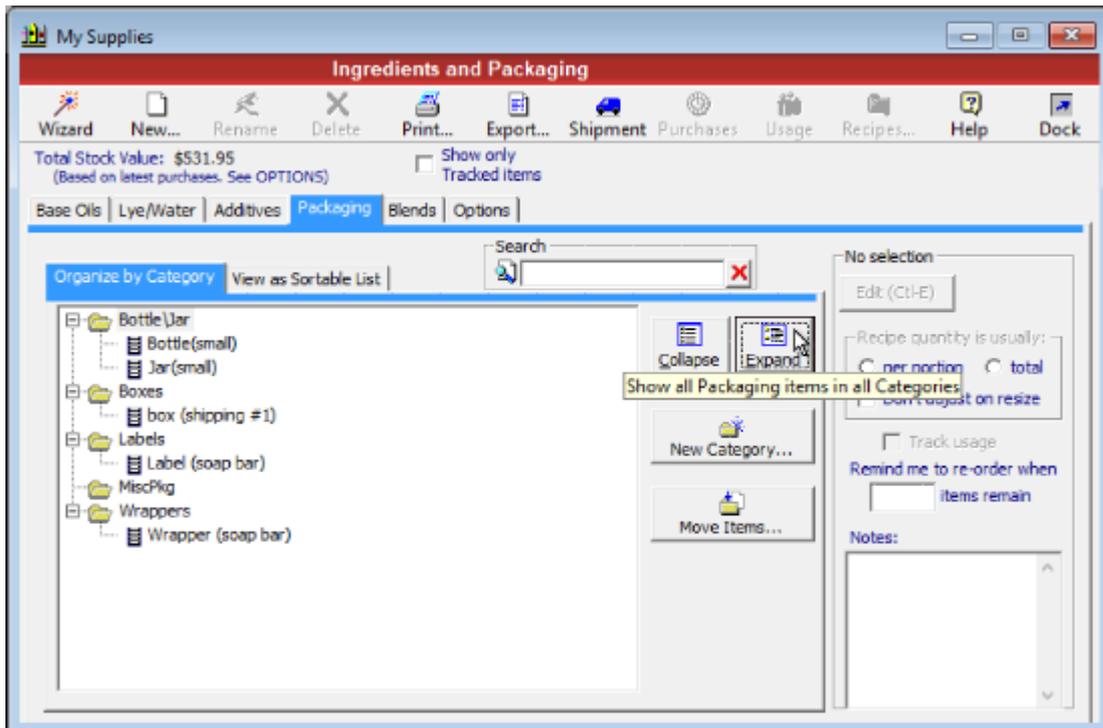
**Packaging items** can be anything whose cost you want to include in recipes without contributing to the recipe's weight. Use this list for labels, wrappers, bottles, boxes, etc. which you can include in a recipe. This will make the recipe cost accurate, and enable you to track your packaging items inventory.

### Two Views

MySupplies provides 2 views for Packaging items, selected by clicking the appropriate tab:

#### Organize by Category:

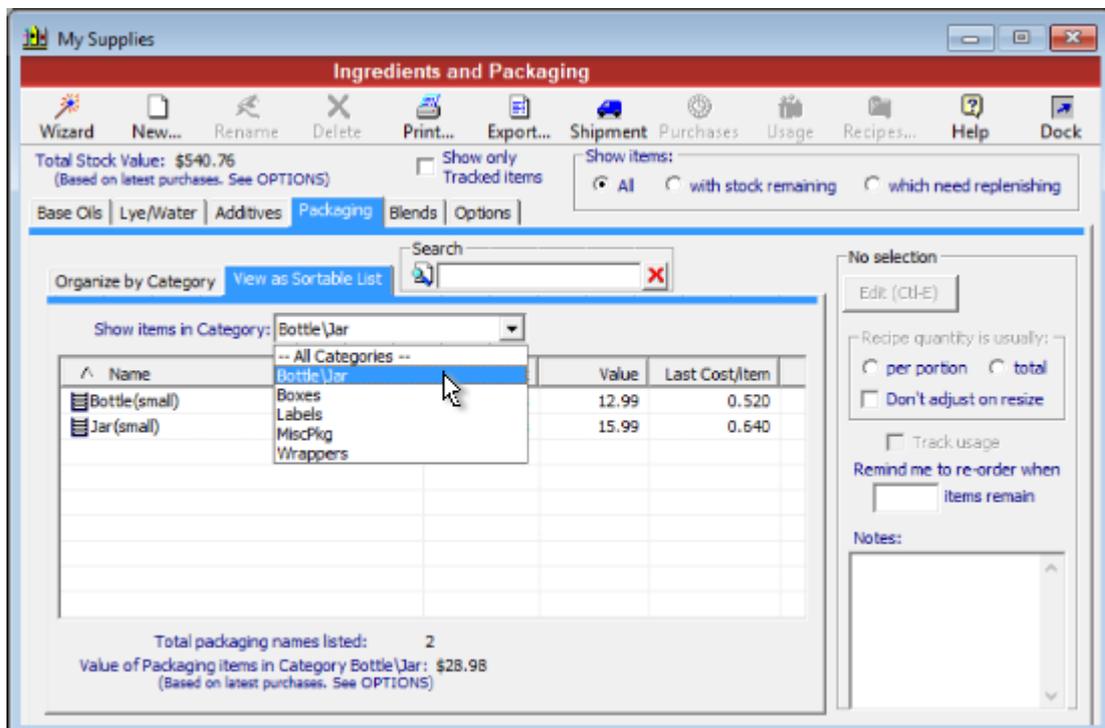
This view shows the hierarchy of Categories and Packaging items, which can be expanded or collapsed by double-clicking a Category name, clicking the **+** or **-** signs, or using the **Collapse** and **Expand** buttons. You can create new Categories, or rename existing Categories.



To move a Packaging item to a different Category, just drag and drop it onto the Category's folder icon. Or use the **Move Items...** button to move several items at once.

**View as Sortable List:**

Select the Category (or "All Categories") from the drop-down list.



The stocklist shows the:

- **Name** of each item
- **Last Cost** (e.g. \$/item). This is always based on your most recent purchase of each item.
- **Pro In Stock** quantity remaining in stock.
- **Pro Value** of that stock quantity. You can choose whether to show stock values based on either:

- 'current market value' (i.e. your most recent purchase of each item), or
- actual costs of each lot purchased (See [Options](#) for choosing stock value method.)

Below the list, you can see the total **number** of names listed, and their total **value**.

### Recipe Quantity option

When used in recipes, a packaging item quantity can either be specified as "per bar/portion" or "total for the recipe". Set the default option for new recipes here. You can override the default in a particular recipe.

If you select the "total" option, you also specify whether the quantity in a recipe should remain fixed, or be re-calculated when the recipe is [resized](#).

### Search Box

To find a particular packaging item quickly, just start typing any part of its name in the **Search** box. To clear the search, click the **X** next to the box.

### Pro Inventory Tracking

If a packaging item's **Track Usage** box is checked, SoapMaker adjusts the stock **quantity** whenever you [make a batch](#) using a recipe with that item. You can also enter a **threshold** amount which will trigger a reminder to order more when your stock gets low. You can enter **notes** for each item.

Icons at the left of each item in the list indicate the current status:

|   |  |
|---|--|
|    | Stock remaining is still above the "re-order" threshold              |
|    | Stock is getting low - it may be time to order more.                 |
|  | No Stock remaining!  |
|  | This item is not being tracked. No stock quantity or value is shown. |

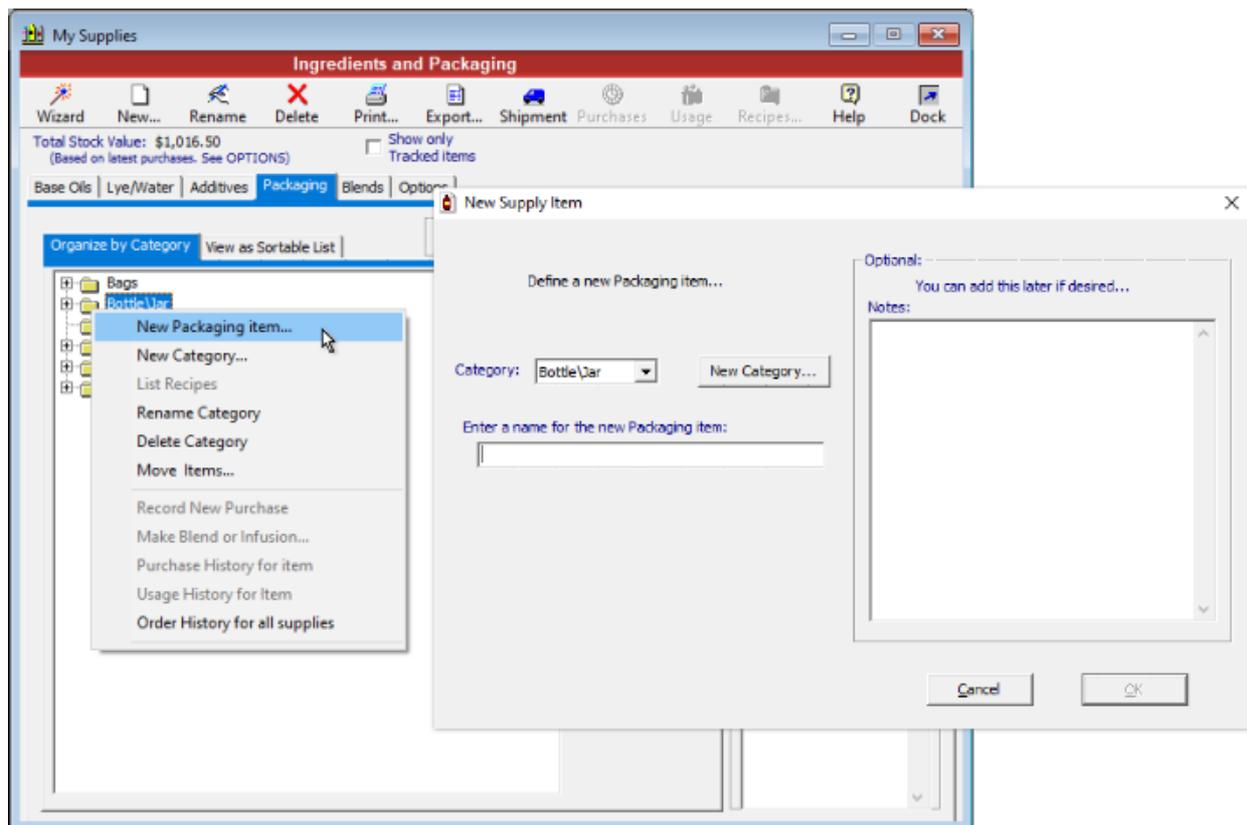
Below the list is the **total value** of your Packaging stock.

For a list of available commands, see [My Supplies - Overview](#)

### Defining a new Packaging Item

Before using a new Packaging item in your recipes, or recording a purchase, you need to **define** the item in MySupplies as follows:

1. With MySupplies open, select the **Packaging** tab, then click the **New** button on the toolbar (or right-click a category and choose **New Packaging Item...** from the pop-up menu). The New Supply Item dialog window will open:



2. Choose the Category from the drop-down list if you didn't select one before opening the dialog, or click the **New Category** button to create a new one.
3. Enter the name for your new Packaging item.
4. If desired, enter any **notes** about this item. Or you can leave this blank and fill it in later.
5. Click **OK**.

### Labor cost

You can use SoapMaker's **Packaging** feature to include a **labor cost** with each recipe, so that your product costs reflect this as well as all the ingredient costs. Create a "packaging item" called **labor-hour**. For more information see the topic [Labor Costs](#).

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### Blends and Infusions

**Pro** Create custom **Blends** or **Infusions** by combining two or more ingredients into a new blended ingredient which can then be used in your recipes. Your custom blend can include **base oils** and **additive** ingredients. The properties of the blended ingredient are automatically calculated from those of the individual ingredients. For example, if the blend includes one or more base oils, the blended ingredient's **SAP value** will give you the correct lye calculation when used to make a new recipe.

### Overview

Each blend or infusion you create has a **formula** displayed in the **Blends** List, and a related **blended ingredient** item in either the **Base Oils** stocklist, or the **Additives** stocklist.

Once you have created the formula, you can **make** the blend - this will add the formula quantity to the blended ingredient's stock quantity, and deduct the amount used from the stock of each of the formula's component ingredients.

### Limitations

1. **Nested blends not supported**

Including a blended ingredient in another main blend is not fully supported... For recipes using the main blend, the included blend's ingredients will not show in:

- The recipe printout or exported ingredient list
- [Supply Lots Used report](#) for batches made with the recipe
- The [Shopping List](#) ingredient list for the recipe

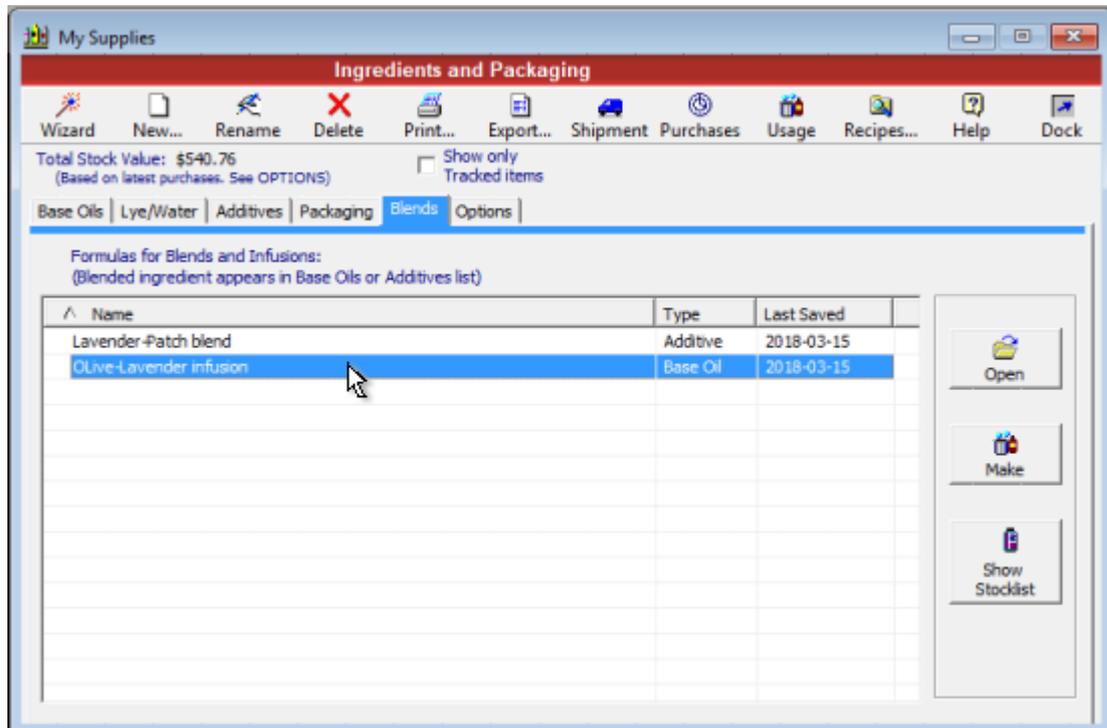
Instead of nesting blends, you can include blends in a non-soap recipe, record a batch made with that recipe, then [re-use](#) the batch as a supply item that can be used in other recipes, similar to a blend.

## 2. No lye in blends

You cannot include **lye** in a blend - if you want to create your own soap bases for use in other recipes, please see the topic [Soap Bases and Re-batching](#).

## Blends List

This list shows the **Name** of each blended ingredient, the **Type** (Base Oil or Additive) and the **Date** it was saved.

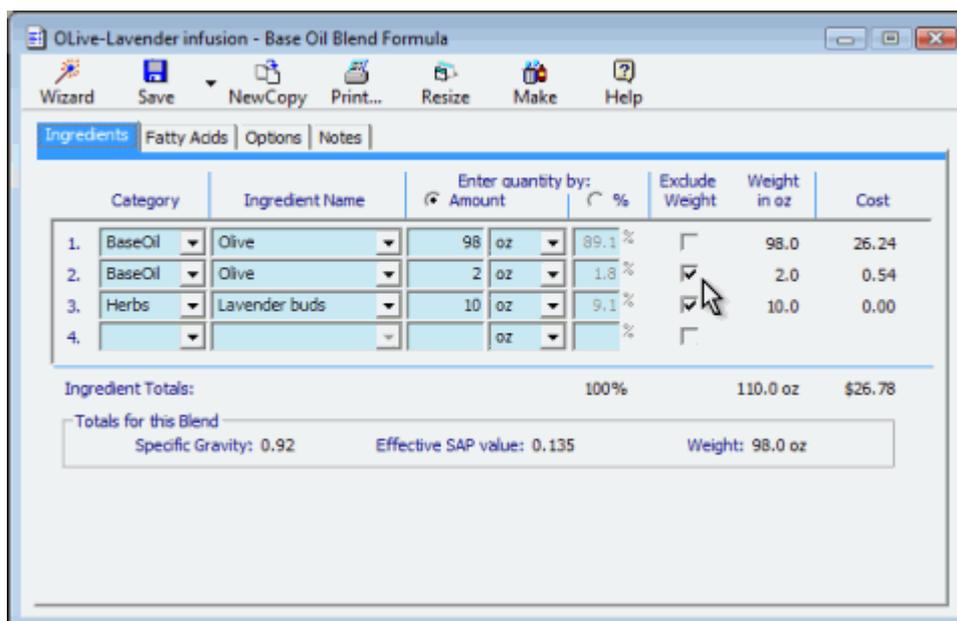


To open the formula for an existing blend, double-click it, or select it and click the **Open** button or right-click and choose **Open Formula** from the pop-up menu.

To see the related stocklist entry for a blended ingredient, select it in the list and click the **Show Stocklist** button or right-click and choose **Show item in Stocklist** from the pop-up menu.

## Creating a Blend Formula

To create a new formula for a blend or infusion, click the **New** button, or right-click and choose **New Blend Formula** from the pop-up menu. This will open a new formula, which looks similar to a [recipe](#):



Enter ingredients and amounts as you would with a recipe. You can even include other blended ingredients in the formula.

If you are making a herbal **infusion** and will be removing the herbal material before using the blend, check the **Exclude Weight** box next to that ingredient as shown in the example above - this will exclude that ingredient's weight from the Blend total. (The excluded ingredient's stock quantity will still be deducted whenever you **make** some of this blend.)

At the bottom of the Ingredients page, the following totals are displayed:

- **Specific Gravity** - This is the blend's density calculated from each component ingredient's [specific gravity](#).
- **Effective SAP value** - This is calculated from the [SAP values](#) of any Base Oil component ingredients, and indicates the proportion of lye needed to saponify this blend if you choose to use it as a Base Oil in your recipes.
- **Weight** - This is the total weight of all the component ingredients except those with **Exclude Weight** checked.

### Saving a Blend

When you have finished creating your Blend formula, click the **Save** button. You will be asked to choose whether you want to save the blend as a **Base Oil**, or an **Additive**. If you choose Additive, you will also need to select a **Category**, or create a new one. Give your new blended ingredient a name that will be easy to recognize when used in recipes.

The new Blend formula will appear in the **Blends list**, and a related item with the same name will appear in the **Base Oils** or **Additives** stocklist, depending on your choice of blend type. Blended ingredients have a unique icon with a little "B" so they can be spotted easily in the stocklist:  or .

The **unit cost** of the blended ingredient is calculated from the blend formula's component ingredient costs. The initial stock quantity is set to zero until you **make** a batch of this blend.

### Accounting for Waste

When you make an infusion, some of the liquid may be lost when you strain out the solid material. To account for this, you can make **two** entries for the liquid (as shown in the example formula above for Olive oil), one for the quantity you expect to be **wasted**, and one for the **remainder**. Check the **Exclude Weight** box for the quantity to be wasted. This will give you the correct final weight for the infusion, and when you make the blend it will adjust your inventory correctly for the liquid used, including the waste.

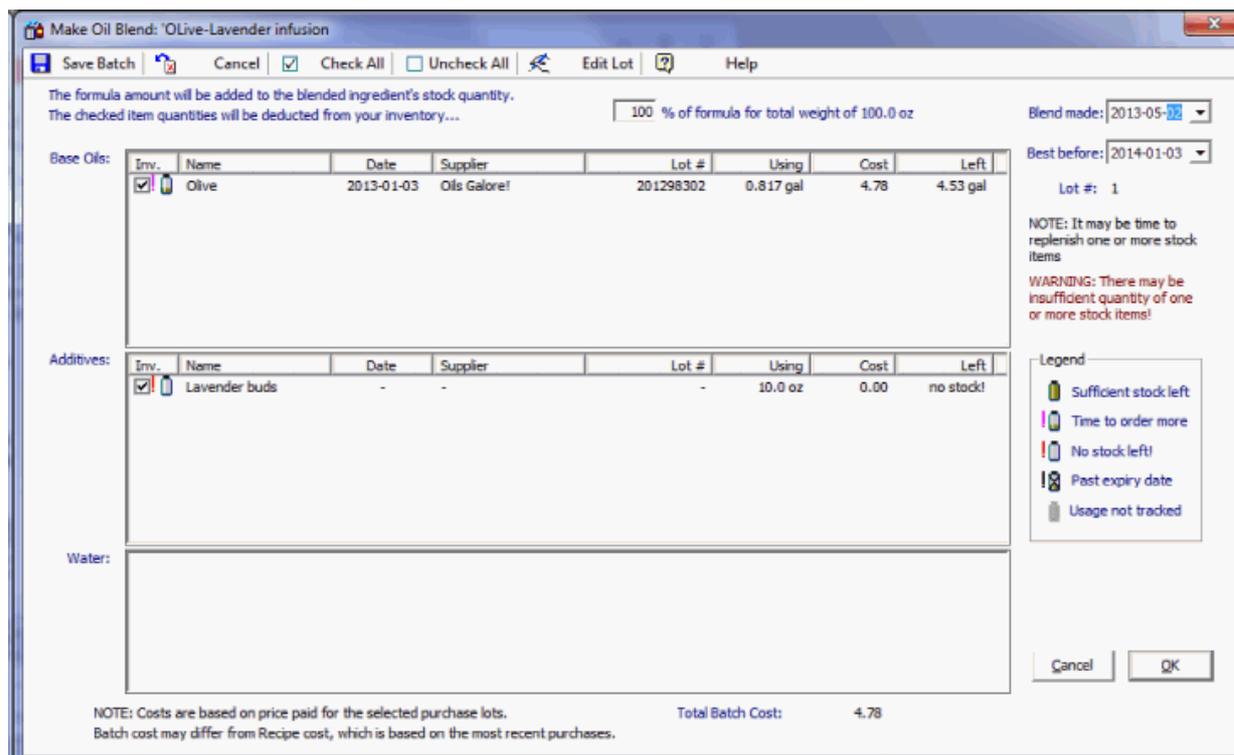
You may need to experiment to get the correct waste quantity - try actually making some of the infusion

without specifying any waste quantity. Then weigh the resulting quantity remaining after straining out the solid material. Edit the formula to set the quantities for waste and remainder correctly to match your experiment.

## Recording a Blend Batch

Whenever you mix a batch of your blended ingredient, use the **Make Blend** command to adjust your inventory to match. Either select the blend formula in the **Blends list** and click the **Make** button, or double-click the item in the stocklist to open the formula, then click the **Make** button on the formula toolbar.

The **Make Blend** dialog will open as shown in this example:



You can increase or decrease the quantity made by entering a percentage other than 100%. For example, to make only a half batch of the formula, enter 50%.

The **Blend made** date is initially set to the current date, but you can select a different date using the drop-down calendar. The **Best Before** date is initially set to the oldest expiry date of all the ingredient lots, but you can select a different date if desired.

For each of the blend formula's ingredients, the list shows the supply lot (or lots) which were used to make the batch, indicating the purchase **Date**, **Supplier** and **Lot Number**, followed by the quantity which the batch is **Using**, and how much of that lot is **Left** in stock after the batch is made. The **Cost** for that item is based on the adjusted cost of the supply lot used.

If one or more items have insufficient stock for the batch, or if the quantity left will be less than the re-order threshold you have set in MySupplies, A warning message will appear, and a beep will sound.

The **Inventory** column (first column of the list), contains a checkbox for each item. Every checked item will have its inventory adjusted when the batch is recorded. If you do not want a particular item to be deducted from your supplies inventory, you can uncheck the box. If you want no supply stock quantities changed, click the **Uncheck All** button on the toolbar (e.g. when documenting old batches).

The **Status Icons** indicate how the supply stock of each ingredient is affected by making this batch (sufficient left, getting low, or none left - see the legend in the lower right part of the window). Note that the status applies to the entire stock of that ingredient, not just the individual lot or lots being used for this batch. If there are multiple lots shown for a particular ingredient, only the first will show an icon (except the **Expired** icon will always show for any lot which has passed its expiry date).

**Total Stock Left** - The list only shows the stock left for each lot being used in this batch. If you want to

know the total stock quantity for any ingredient, hover your mouse over the stock left quantity shown and a pop-up will show the total stock for that ingredient as shown in the example above.

### Choosing Supply Lots

By default, SoapMaker draws stock for each ingredient from the **oldest** supply lot which still has stock remaining. If that lot does not have sufficient stock to fulfill the formula, then the next oldest lot is also used. So the list may show multiple lots of the same ingredient, indicating how much is needed from each lot. If you prefer to use different lots, or different quantities from the same lots, you can edit any list item - either double-click it, or select it and click the **Edit Lot** button on the toolbar. This will open the **Edit Quantities** dialog:



Here you see all the supply lots which still have stock of the selected ingredient. In this example, there are 3 lots of Coconut oil with stock remaining, and the oldest lot has been selected by default, using 1.25 lb to satisfy the recipe. If you would rather use a newer lot for this batch, or even use some of each lot, you can enter the desired amounts used for each. Click the **Adjust** button next to the original amount to have it automatically adjust as needed to make the total used still match the recipe total.

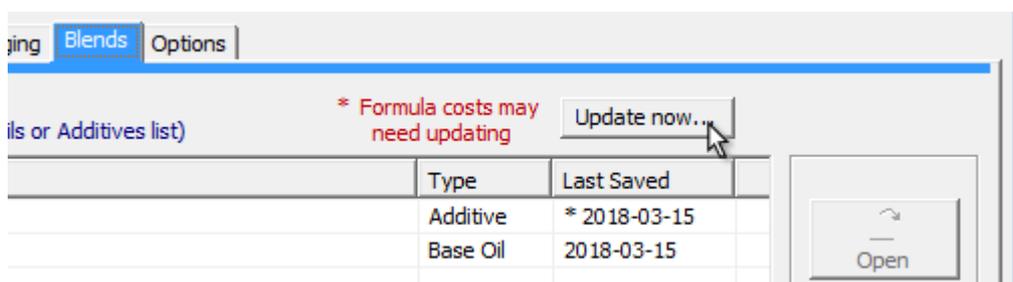
When you click **OK**, the blend's total weight will be added to the stock quantity of the blended ingredient, and the component ingredients' stock will be reduced accordingly.

**Note:** Because you make your own blends, rather than purchase them, clicking the **Shipment** button, or double-clicking a blended ingredient in a stocklist, will open the blend **formula** so you can make a batch. Clicking the **Purchases** button will show a history of batches made with the selected Blend formula.

### Updating Blends

When you record a new ingredient purchase, any blend formulas which use that ingredient will be marked for update to reflect the new unit cost, just as recipes are marked in [MyRecipes](#).

Formulas which need updating are flagged with \* next to the date, and the **Update now** button appears:



Clicking this button will update any blends that require it, and then any recipes that need updating. For more information, see the topic [Updating All Recipes](#).

### Resizing a Blend Formula

You can resize a formula by clicking the **Resize** button on the Blend Formula. You have the option of entering the desired total weight, or a percentage of the original weight. A copy of the formula will open, resized as requested.

If you want to replace the original with the resized copy, first close the original formula, then Save the resized copy and select the original formula name.

Note that you can also resize a blend when you **make** some without having to change the formula.

## Options

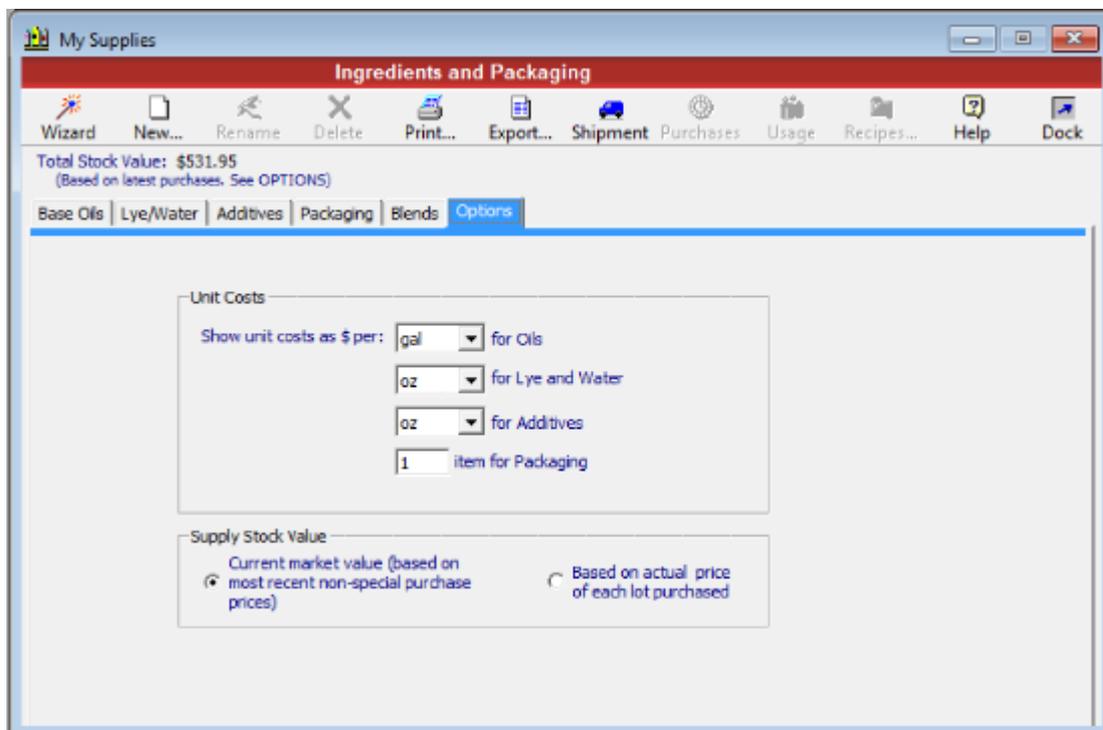
### Unit Cost and Stock Value options

The Options tab enables you to select the desired units for displaying the **unit cost** of each item in the stock lists.

**Pro.** You can also choose the method for calculating your stock value:

- 'Current market value' based on your **most recent purchase** of each ingredient
- **Actual cost** of each lot purchased.

Note: The option you choose here for calculating stock value also affects the [Tax and Income Summary report](#).



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## MyRecipes

### The Recipe Management Center

**MyRecipes** lists all your recipes which are stored within SoapMaker's [database](#). Controls are provided for creating new recipes, and for opening, renaming or deleting existing recipes.

To open MyRecipes (or bring it to the front if it's already open), click the **MyRecipes** button on the main toolbar, or select **Show MyRecipes** from the main **Recipes** menu.

Each recipe belongs to a **Recipe Group**. You can think of Groups as "folders" and recipes as "documents" within those folders. You create groups and name them any way you like to help organize your recipes.

## Two Views

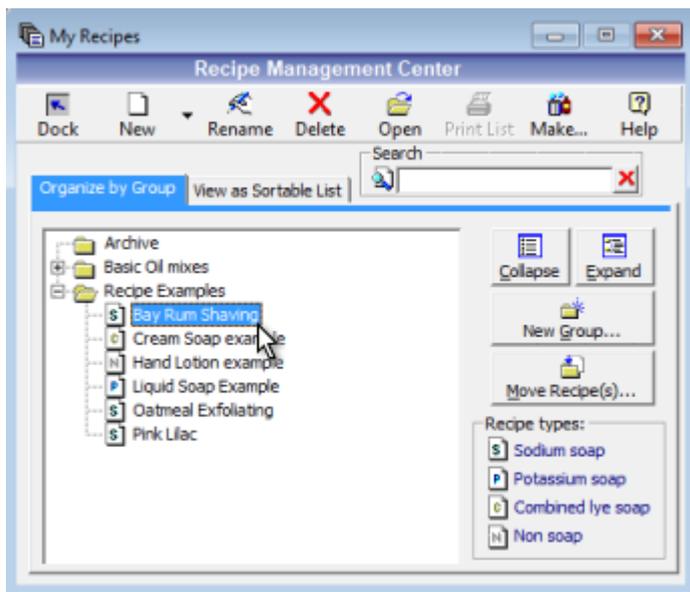
MyRecipes provides 2 views, selected by clicking the appropriate tab:

### Organize by Group:

This view shows the hierarchy of groups and recipes, which can be expanded or collapsed by double-clicking a group name, clicking the **+** or **-** signs, or using the **Collapse** and **Expand** buttons. You can create new groups, or rename existing groups.

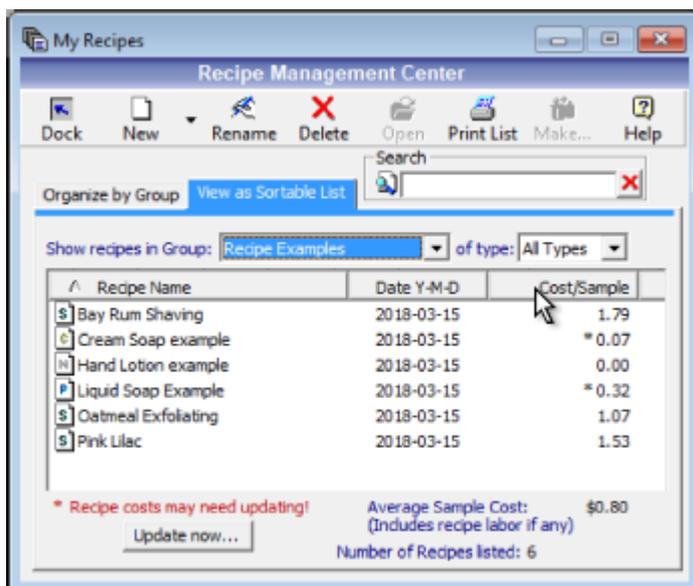
To move a recipe to a different group, just drag and drop it onto the group's folder icon. Or use the **Move Recipes** button to move several recipes at once.

Note: You cannot rename or delete the **Archive** group. This special group can be used to save old recipes you no longer use, but want to keep for reference. Recipes in the Archive group are normally not shown in lists when you select the option to **view all recipes**, and are not updated when you use the [Update All Recipes](#) command unless you specifically request it.



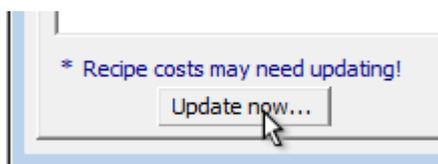
### View as Sortable List:

The list view shows the Name of each recipe, the Date it was last saved, and the Cost per Sample. You can select a particular group to display, or "all except Archive". You can also select a particular recipe **type**, or all types.



To sort the list, click on a column header. For example to sort by cost, click the **Cost/Sample** header. Click again to sort in the reverse order.

Any recipe which needs to be updated to reflect changes in supply costs or properties is flagged with \* before the sample cost. If you sort the list by **\$/sample** in descending order, all the flagged recipes will show at the top of the list.



If any recipes in the displayed list need to be updated, The **Update Now** button appears. Clicking the button will [update recipes](#) to ensure the sample costs shown in MyRecipes are current.

The **sample sizes** used to calculate the cost per sample are set for each recipe type in [MyPreferences](#). Using a uniform sample size provides a way to compare different recipe costs regardless of the actual size of each recipe. If you want to be able to compare costs between different recipe types, you should set the same sample size for each type. This does not have to be related to actual product bar size or portion size. The sample costs include any [labor cost](#) you have specified in the recipe.

If you change the sample **size** or **units** in *MyPreferences*, **all** recipes of the affected type will be flagged for updating.

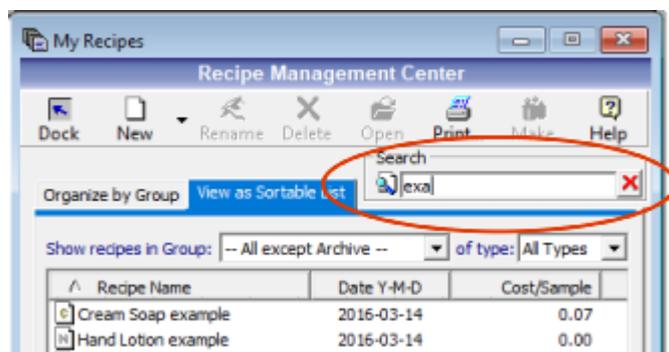
## Recipe Types

There are 4 **types** of recipe, represented by icons:

-  Sodium soap - Uses only Sodium Hydroxide (NaOH)
-  Potassium soap - Uses only Potassium Hydroxide (KOH)
-  Combined lye soap - Uses both NaOH and KOH lye
-  Non soap - Has no lye. Use this type for "melt & pour" soap, and for lotions, salves, candles, etc.

## Search

To search your list for a particular recipe, start typing any part of the name in the **Search** box...



You can search in the Archive group, otherwise all other groups will be searched. To stop searching, click the **X** next to the search box.

## Commands

To access the various commands available, select a recipe or group and click the appropriate toolbar button, or right-click to see a **pop-up menu**. The following commands are available from the toolbar:

- Delete** Permanently delete the selected recipe, or group of recipes.
- Dock** Moves *MyRecipes* window to the upper left corner of the main window to make space for opening recipes, etc.  
If the [Qualities Graph](#) is open, it will be docked in the lower left corner underneath *MyRecipes*.
- Help** Opens this page.
- Make** [Make a batch](#) with the selected recipe. This creates a new batch record in **Pro** *MyProducts*, and deducts the recipe ingredients from *MySupplies* stocklist.
- New** Create a new recipe. Select the desired type from the drop-down list.

**Open** Open the selected recipe. You can also just double-click a recipe in the list to open it.

**Print** Print the recipe list as currently displayed.

**Rename** Allows you to edit the name of a recipe or group. If you have saved batches made with the recipe being renamed, SoapMaker will offer to change the batch recipe names to match.

Additional command buttons:

**Collapse** In the Organize by Group view, this collapses the entire list to show only the group names.

**Expand** Expands the entire list to show all recipes in all groups.

**New Group** Create a new group and name it as you wish.

**Move Recipes** Move several recipes at one time from one group to another.

## Window stuff and Shortcuts

You can move MyRecipes by dragging the top. You can resize it by dragging a corner or edge. SoapMaker will remember the size and location the next time you open it.

Press **Ctrl-T** on your keyboard to select the next Tab.

Press **Ctrl-N** to create a new recipe.

In the either view, use the keyboard **up/down arrows** to select another recipe.

To close MyRecipes, click the  in the upper right corner, or select **Hide MyRecipes** from the main **Recipes** menu.

## Related Topics

[Initial Setup](#)

[Creating a Recipe](#)

[Making a Batch](#)

[Updating all recipes](#)

## MyProducts

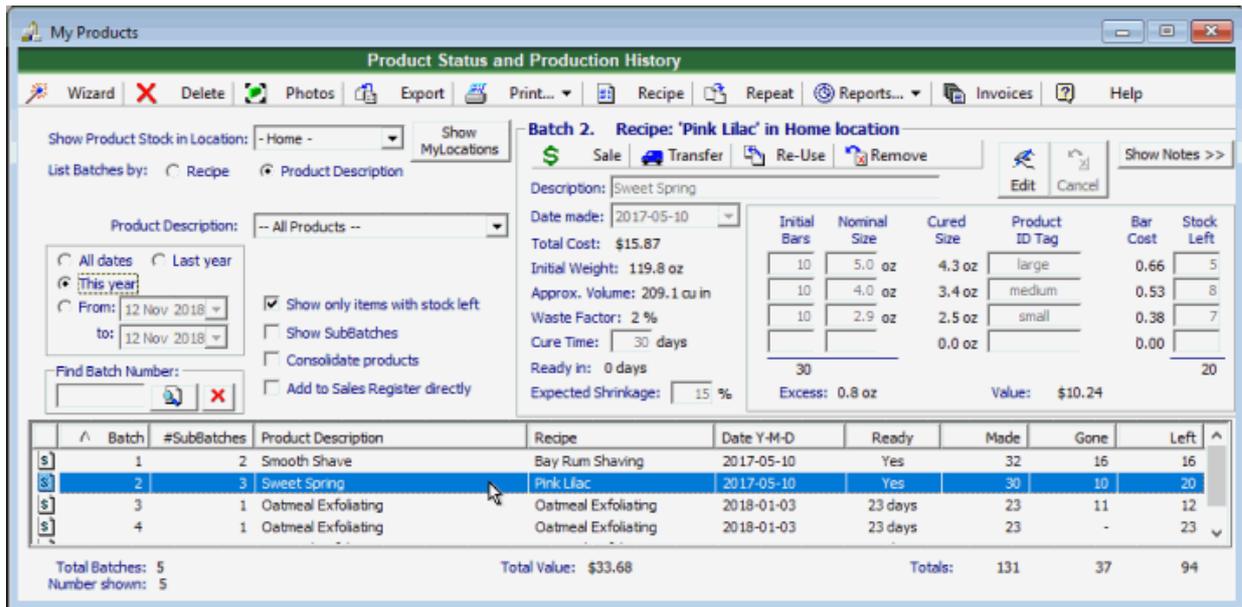
### **Pro** The Product Management Center

Whenever you make soap or other products, the [Make a Batch](#) command creates a record of that batch from the selected recipe. MyProducts lists all the batches you have made, with their current status.

To open MyProducts (or bring it to the front if it's already open), click the **MyProducts** button on the main toolbar.

The MyProducts window has 3 main areas:

- The [Batch List](#) shows summary information for each batch you have made. The list contents are determined by criteria you set.
- The [Batch Details](#) area shows all the information about a selected batch, and enables you to make changes and record notes.
- The Toolbars provide various [Commands](#). Buttons which affect the stock of a selected batch are grouped in the small toolbar at the top of the Batch Details area.



## Batch List

The lower portion of MyProducts contains the **Batch List**, which shows summary information and status of each product batch. By setting the criteria in the upper left of the window, you can tailor the display in various ways:

If you have set up multiple product **locations**, you can choose to display products in all locations, or only in a specific location.

You can choose to display batches either by **Recipe**, or by Product **Descriptive name**;

If you choose **'by Recipe'** then you can show batches made...

- with a particular **recipe**,
- with all recipes in a particular **group**, or
- with all recipes in **all** groups

(To see batches whose recipes may have been deleted or renamed, check the box labeled 'Show only batches with no associated recipe'.)

If you choose **'by Product Description'** then you can show batches...

- which share a particular **product description**, or
- all product batches

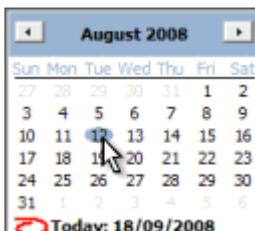
If you typically split product batches into **sub-batches** with different sizes, you can expand the list to show each sub-batch on a separate line. This can save you time when recording product sales as you can avoid having to select the sub-batch for each item added. Or you can collapse the list to show a single line for each Product Description by clicking the **Consolidate Products** checkbox.

You can further refine the contents of the list to show only batches which:

- still have **stock remaining** (Check the box labeled 'Show only batches with stock left')
- were made within a specified **date range**



To enter specific dates, open the drop-down calendar and then select the desired month and date.



For each batch displayed, the list shows the following...

- Recipe Type:** An icon indicates whether Solid, Liquid or Cream Soap, or Non Soap
- Batch Number (or #Batches):** Batch numbers are assigned automatically in sequence each time you make a batch (If you choose the **Consolidate Products** option, the number of batches of each product will be displayed instead of individual batch numbers.
- SubBatch (or #SubBatches) :** The number of sub-batches in each batch (1 to 4). If you choose the Show Sub-Batches option, this column shows the Tag of each sub-batch.
- Description:** You can set this to anything you like to name or describe the product - this is how they will appear on customer invoices.
- Recipe:** The name of the recipe used to make this batch
- Date:** The date the batch was made
- Ready:** "Yes" if products are ready to sell, Days remaining if soap is still curing
- Made:** The number of bars or portions made from the recipe
- Gone:** The difference between the **Made** and **Left** quantities. This is the number that have been sold so far, or removed from stock for any reason.
- Left:** The number of bars or portions still remaining in stock

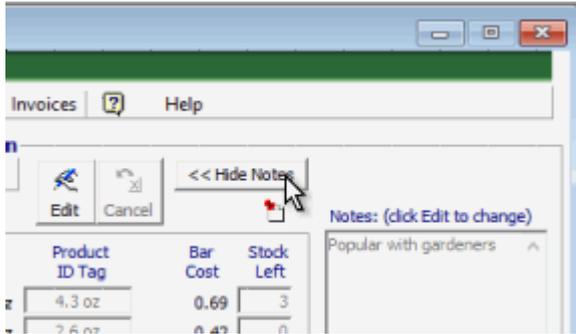
You can sort the list by clicking on any column header. Click again to sort in reverse order. In the example above, the list is sorted by Batch number in ascending order.

List totals are shown at the bottom, including the total **Value** of the remaining stock from the displayed batches (based on the costs of ingredients used to make the batch).

### Batch Details

When you select a batch in the list, the **Batch details** are shown in the upper right area. You can make changes to the batch details or notes by clicking the **Edit** button (it changes to **Save**).





If you have saved notes about this batch, you will see a small icon like this: 

To see the notes, click the **Show Notes** button to expand the window (it changes to **Hide Notes**).

When you make a new batch, the details are calculated from the recipe, and default settings from MyPreferences. The following information is displayed for the selected batch:

**Description:** Enter whatever you want to call this product. A default name is provided when you make a batch, but you can change it then or edit it here in the batch details. This **Product Description** is what will appear on customer invoices, and is used to identify the product in your [Price List](#).

Note: If you change the Description of an existing batch, you will be given the option to change all batches having the previous description to match.

**Date Made:** Set when you use the **Make Batch** command, but you can edit it here to show the actual date you manufactured the product batch.

**Total Cost:** This is the total recipe cost, based on the costs of all the ingredients at the time the batch was made.

**Initial Weight:** The recipe total weight reduced by the Waste Factor.

**Approx. Volume:** The recipe volume reduced by the Waste Factor.

**Waste Factor:** Defaults to whatever you have set in MyPreferences for this recipe type, but you can change it when you use the **Make Batch** command.

**Cure Time:** This determines when the batch list shows this batch is "ready". Defaults to whatever you have set in MyPreferences for this recipe type, but you can edit it here.

**Ready in:** Number of days until ready to sell, based on Cure Time setting and Date Made.

**Expected Shrinkage:** Determines **Cured Size** of soap bars or other products which shrink due to water loss after manufacture. Defaults to whatever you have set in MyPreferences for this recipe type, but you can edit this to reflect actual experience.

The **Bars/Portions Made**, and their **Nominal Size** and **Cost**, are determined when you record the batch, but you can edit them here if needed. If you actually make several different sized bars/portions from a single batch, you can record up to 4 varieties as **sub-batches**.

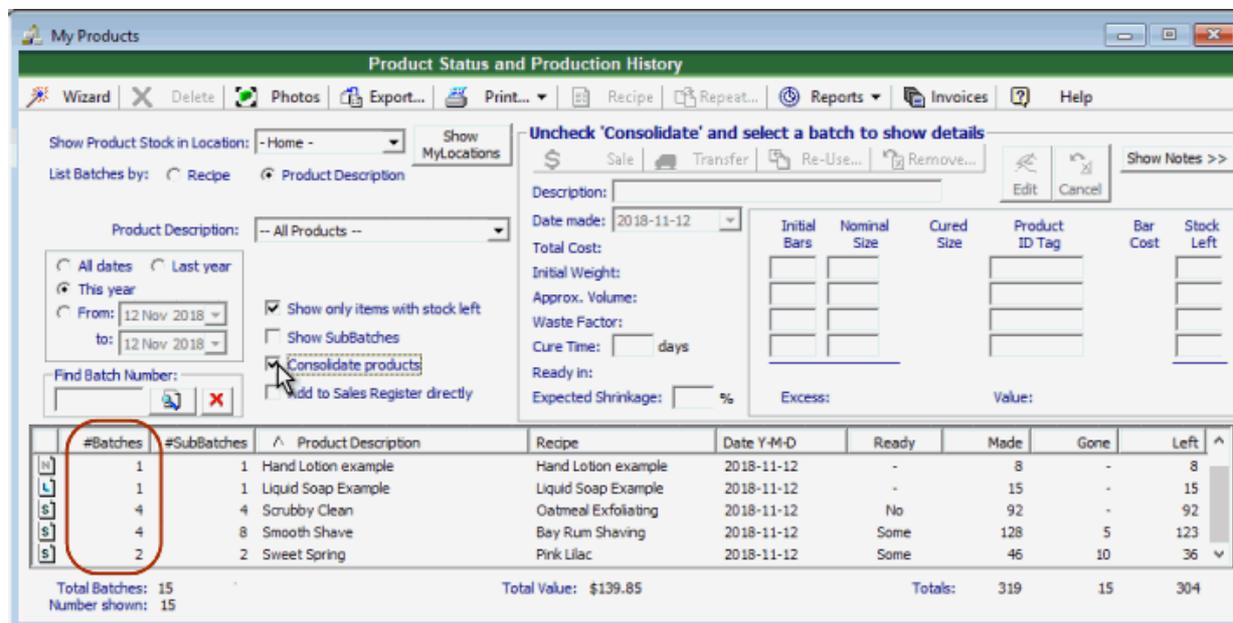
Each sub-batch must have a unique **Tag** which describes it. This differentiates products with the same Product Description but different size or other attribute, and is used in your Price List and on customer invoices. You can enter anything you like for the Tag - for example if you separate your batch into different sized bars or portions, the Tags could be 'Small', 'Medium', 'Large' and 'XLarge'. Or if you pour a soap batch into several different mold shapes, you could use Tags like 'Star', 'Fish', etc. to describe the shapes.

The cost of each bar or portion is calculated from its size and the total recipe cost, based on the costs of all the ingredients at the time the batch was made. The total **Value** of the remaining stock from this batch is shown at the bottom (based on the recipe cost).

You can edit batch details such as the **Stock Left** quantity for each product. For more information see the topic [Editing product batches...](#)

### Batch Consolidation

To see at a glance how much stock you have for each Product Description, or each Recipe, click the **Consolidate Products** checkbox. The Batch list will then summarize the stock for all batches of each particular product on a single line as shown in this example:



Now the **Batches** column shows the total number of batches for each product. The **Date** column shows the date of the most recent batch. The **Made, Gone and Left** columns show totals for all batches of that particular product.

If you choose the **List Batches By Recipe** option, **Consolidate products** will show all batches made with a particular recipe on a single line, and the list will be sorted by recipe name. If not all batches made with a particular recipe have the same **product description**, then that column will show 'mixed'.

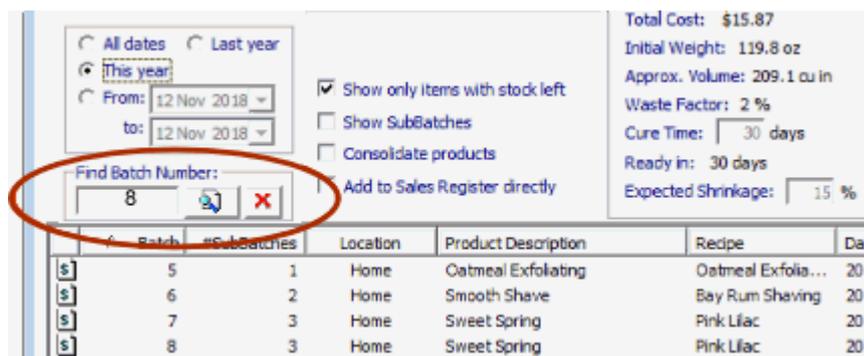
If you choose **List Batches By Product Description**, all batches with the same description will be shown on a single line, and the list will be sorted by product description. If not all batches of a particular product were made with the same **recipe**, then that column will show 'mixed'.

In the consolidated view, you can record [sales](#) or [transfers](#) of products from multiple batches in a single operation - stock will automatically be drawn first from the oldest batch with remaining stock.

Since each line in the list represents multiple batches, you cannot view batch details, or select a line to edit a batch record - you must first un-check the **Consolidate** option.

### Search

You can search for a specific batch number by typing it in the **search box** and clicking the **Search Button**. If the batch is found, it will be highlighted in the list, and the details will be displayed. To cancel the search, click the **X** button.



## Commands

The following commands are available from the main Toolbar of MyProducts (also available by right-clicking on a selected batch to see a pop-up menu):

|                 |  |
|-----------------|--|
| <b>Delete</b>   | Permanently delete the selected batch (or batches). If deleting a single batch record, you will have the option to return any ingredients used to MySupplies inventory - this is useful if you used the <b>Make Batch</b> command, but did not actually make the products.   |
| <b>Export</b>   | Save the contents of the displayed batch list as CSV file that can be opened with a spreadsheet.   |
| <b>Invoices</b> | Display the <a href="#">Customer Invoices</a> report which shows the contents of all sales invoices, or registers from venue sales.  |
| <b>Photos</b>   | Open the <a href="#">Product Photo</a> window. If a batch is selected, and it has an assigned photo, it will be displayed.   |
| <b>Print</b>    | Print either the <b>Batch List</b> , or the <b>Details</b> of the selected batch. If a specific location other than Home is selected, you can also print a 'consignment stocklist' showing the status of stock at that location.   |
| <b>Recipe</b>   | Open the recipe used to make the selected batch  |
| <b>Repeat</b>   | Make another batch like the selected one. You do not have to locate or open the recipe.  |
| <b>Reports</b>  | Select the desired report from the drop-down list:<br><b>Sales History</b> - Displays the <a href="#">Sales History report</a><br><b>Supply Lots Used</b> - Displays the <a href="#">Supply Lots Used in Batch report</a><br><b>Reused Products</b> - Displays the <a href="#">Reused Products report</a><br><b>Removed Stock</b> - Displays the <a href="#">Stock Removed report</a><br><b>Transferred Products</b> - Displays the <a href="#">Product Transfers report</a> |
| <b>Help</b>     | Click to open this Help page (or press the F1 key).  |
| <b>Wizard</b>   | Pop-out Wizard provides assistance with common tasks.  |

The Toolbar in the **Batch Details** area provides the following commands which affect your product stock levels (also available by right-clicking on a selected batch):

|                 |  |
|-----------------|--|
| <b>Sale</b>     | Open the <b>Add Products to Sales Register</b> dialog where you can <a href="#">record product sales</a> and create a customer invoice   |
| <b>Transfer</b> | Open the <b>Transfer Products</b> dialog where you can define a new location and move your product stock.  |
| <b>Re-Use</b>   | Transfer products to your Supplies inventory for use in other recipes. You can use this feature for re-batching, soap imbeds, pre-made soap bases, or product groups such as gift baskets. You can re-use any quantity of the selected batch, or any excess scraps. (For more information, see the topic <a href="#">Re-using Products as Ingredients...</a> ) |
| <b>Remove</b>   | Open the <b>Remove Products from Stock</b> dialog where you can select the quantity to be removed, and the purpose (e.g. Write-off, Personal use, Donation, Advertising). You can remove any quantity of made products, or any excess scraps to account for the costs. See <a href="#">Removing Product Stock</a> for more information.                        |

You can make changes to the batch details by clicking the **Edit** button, but this should be done with care. For more information see the topic [Editing product batches...](#)

Additional commands are available from the main **Products** and **Files** menus:

**Files/Export MyProducts** Exports the displayed Batch List as a [CSV](#) text file which can be imported to a spreadsheet or accounting program. For more information, see the topic [Exporting reports](#).

**Products/Customers and Venues** You can maintain a [list of customers/venues](#) with contact information.

## Window stuff and Shortcuts

You can **move** MyProducts by dragging the top. You can **resize** it by dragging a corner or edge. SoapMaker will remember the size and location the next time you open it.

**Double click** a batch record in the list to record sales from that batch.

Use the keyboard **up/down arrows** to select a different batch in the list.

**Ctrl-S:** Save changes to the selected batch

To close MyProducts, click the **X** in the upper right corner, or select **Hide MyProducts** from the main **Products** menu.

## Related Topics

[Initial Setup](#)

[Making a Batch](#)

[Cancelling a Batch](#)

[Recording Product Sales](#)

[Consignment Sales](#)

[Sales History](#)

[Customer Invoices](#)

[Organizing your Products](#) - Tips for naming, organizing and tracking your products

[Re-using Products as Ingredients](#)

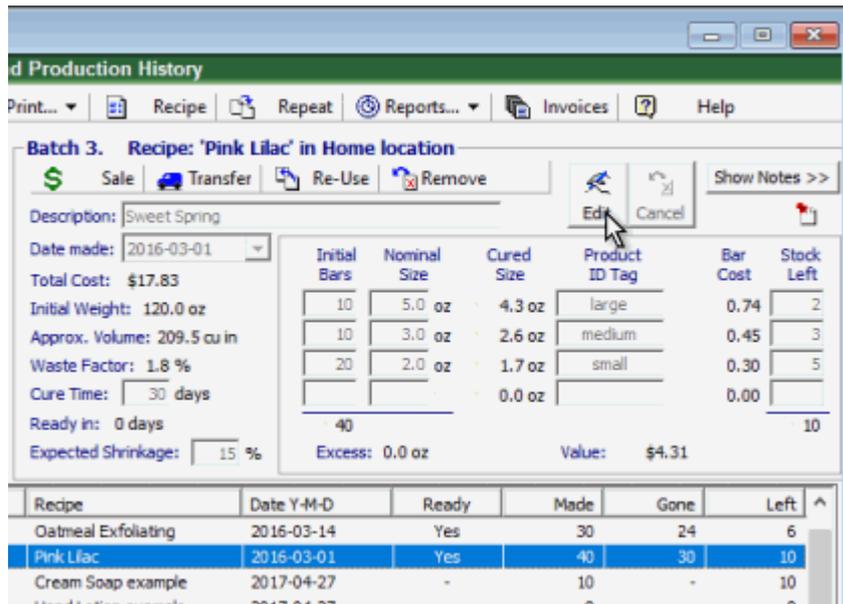
[Removing Stock](#)

[Correcting Stock Quantities](#)

## Editing batch details

If you select a particular batch in MyProducts batch list, you can edit the batch details, with the following exceptions:

- If **Consolidate Products** is checked, you will have to first un-check that box so you can select a specific batch.
- If you are showing batches in **multiple locations**, you cannot edit a batch that has some products transferred to another location - first you must select the desired location.



Select the desired batch and click the **Edit** button - it changes to **Save**.

You can change any of the following, but be aware of consequences:

#### Field to be edited

#### Effect

#### Description

This is how products will appear on customer invoices, so choose something meaningful to them, and good for marketing. When you change this, SoapMaker will offer to update **all** batches and [Price List](#) entries with the same previous description. You should accept this offer unless you want this batch to be unique.

#### Date made

This should be the date you actually made the products, rather than the date you recorded the batch.

#### Cure Time

This just affects the **Ready** column in the batch list.

#### Expected Shrinkage

This affects the products' Cured size and the batch Excess. If you need to change this, consider setting a different default in [MyPreferences](#) for this recipe type.

#### Initial Bars/Portions and Nominal Size

You can change these values, and specify additional sub-batches with different sized bars/portions. Make sure you set the Stock Left values to match.

#### Product ID Tag

Every sub-batch in this batch must have a unique **Tag** which can be used to identify the product on customer invoices. If you change a Tag, SoapMaker will offer to change all batches and [Price List](#) entries with the same **Product Description** and **cured size** to use the same new Tag.

#### Stock Left

You can change this to make your records match your actual inventory. But editing this will not leave any record of the change. When you record sales, or use the [Remove](#) or [Re-Use](#) features, the **Stock Left** value is automatically updated to reflect the change.

**Important:** If your batch has more than one sub-batch, and includes **packaging items** proportional to sub-batch portions made, changing portions after recording the batch will make your product costs inconsistent with actual packaging item costs and supply inventory. If you need to do this, it may be preferable to [cancel](#) the batch, returning items to supply stock, then re-record the batch the way you want it - you can adjust the sub-batch portions in the [New Batch dialog](#) and have your packaging supply stock

deducted correctly.

## Dealing with Excess

After saving changes, if your entered bar/portion count and size have left any **excess**, an optional message will remind you that you can **re-use** these scraps as an additive ingredient, or **remove** the excess and record it in the [Stock Removed report](#) - you can use this to account for scraps and designate the cost of these in categories like 'personal use' or 'write-off'

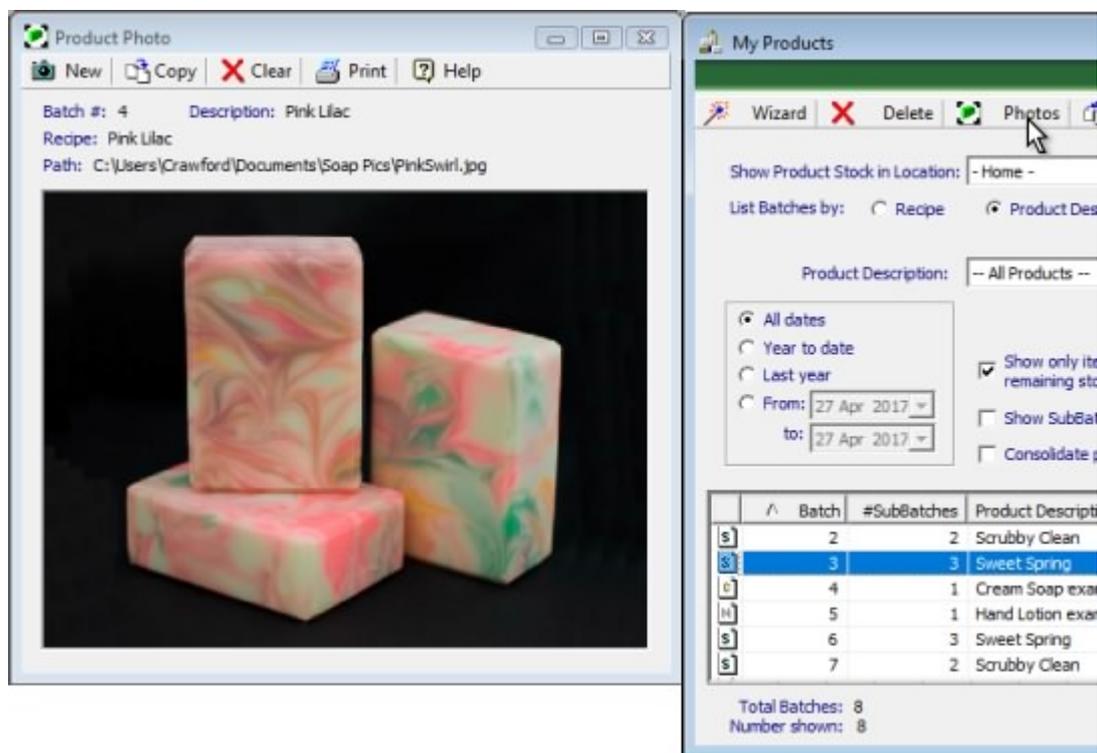
## Product Photos

### Pro The Product Photo window

Each batch in MyProducts can have an associated photo.

To open the Product Photo window, click the **Photos** button on the MyProducts toolbar.

When the Product Photo window is open, it will display the photo (if any) for the batch currently selected in MyProducts. Each time you select a different batch, the photo will change accordingly.



The information area just below the toolbar, shows:

- The **Batch** number
- The product **Description**
- The name of the **Recipe** used to make this batch
- The complete **Path** to the photo file

When you first open the **Product Photo** window, SoapMaker will attempt to fit it adjacent to MyProducts. You can move it by dragging the top, or make it larger by dragging a corner.

## Commands

The following commands are available from the Toolbar, or by right-clicking to see a pop-up menu:

**New** Assign a new photo file to this batch by browsing to locate the file. Use this to change

the existing photo, or to assign one if none is currently assigned.

|                   |   |
|-------------------|---|
| <b>Cop<br/>y</b>  | Copy the current photo image to the clipboard   |
| <b>Clea<br/>r</b> | Remove the current photo assignment for this batch (this does not affect the actual photo file) |
| <b>Prin<br/>t</b> | Print the current photo and batch information   |
| <b>Help</b>       | Click to open this Help page (or press the F1 key).   |

## Photo Files

Each photo image must be in a standard JPEG format with a file type **jpg**. For best results, make sure your photos are cropped to an aspect ratio of 4:3 or they may appear distorted.

It is a good idea to keep all your product photos together in one folder on your main hard drive. SoapMaker will remember the folder location to make it easy to assign new photos.

Once you have assigned a photo to one or more batches, do not change the photo file name or location, or it will no longer be displayed and you will have to re-assign it with the **New** command.

When you assign a **new photo** to a batch, you will have the option to automatically assign the same photo to all existing batches made with the same recipe which do not already have a photo assigned.

When you make a **new batch**, if the last batch made with the same recipe has a photo assigned, that photo will be assigned to the new batch. You can always change it later.

## Backing Up Photo Files

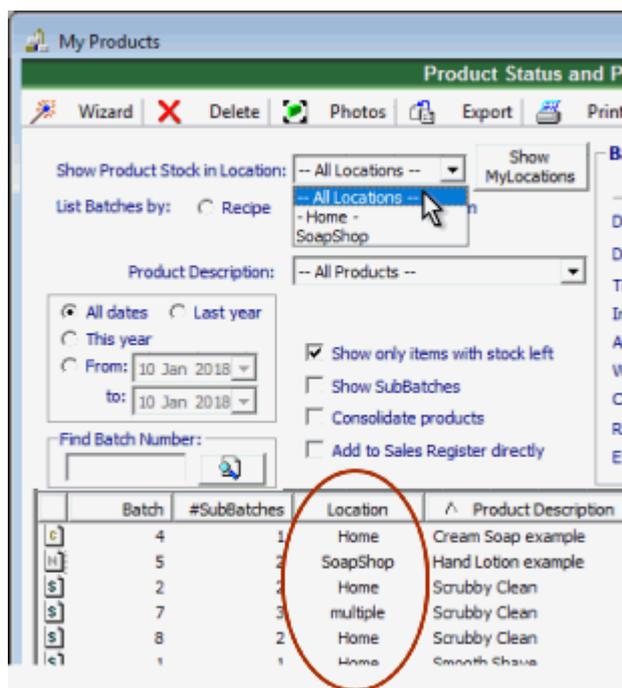
Keep in mind that your SoapMaker database contains only the **path** to each photo, not the photo itself. When you backup your database, it will not protect the photos - you will need to backup your photo collection separately.

To close the **Product Photo** window, click the  in the upper right corner

## Product Locations

**Pro** Your product inventory can be stored in multiple **locations**. Use this feature for [consignment sales](#), or if you have separate warehouses. The default location is called HOME.

The batch list display in [MyProducts](#) can be set to show batches in all locations, or only in a specific one by choosing from the drop-down list as shown.



When showing all locations, a **Location** column is added to the batch list - if a batch has some products in more than one location, it shows 'multiple' instead of the location name.

There are several ways to define new locations:

- Define a new location while [transferring products](#) to that location.
- Open [MyLocations](#) by clicking the **Show MyLocations** button, and add or change locations there.
- Define a new location linked to a customer branch from the [Customers report](#) (under the main **Products** menu).

### Related Topics:

[Transfer Products](#) - How to move products between locations

[Product Transfers Report](#) - History of transfers

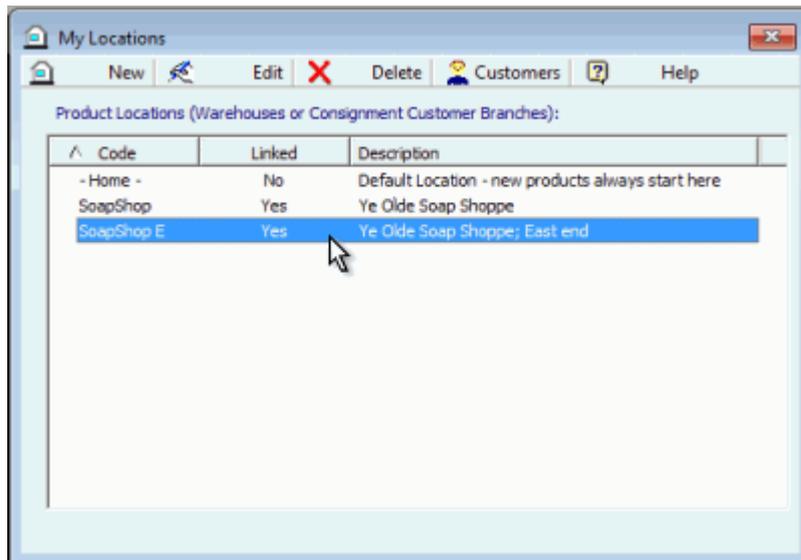
[Consignment Selling](#) - How to manage stock and sales with consignment customers

[MyLocations](#) and [Customer Branches](#) - Defining locations and linking to customer branches

### MyLocations

**Pro MyLocations** lists all your product locations, and provides commands to create new ones, or edit existing ones.

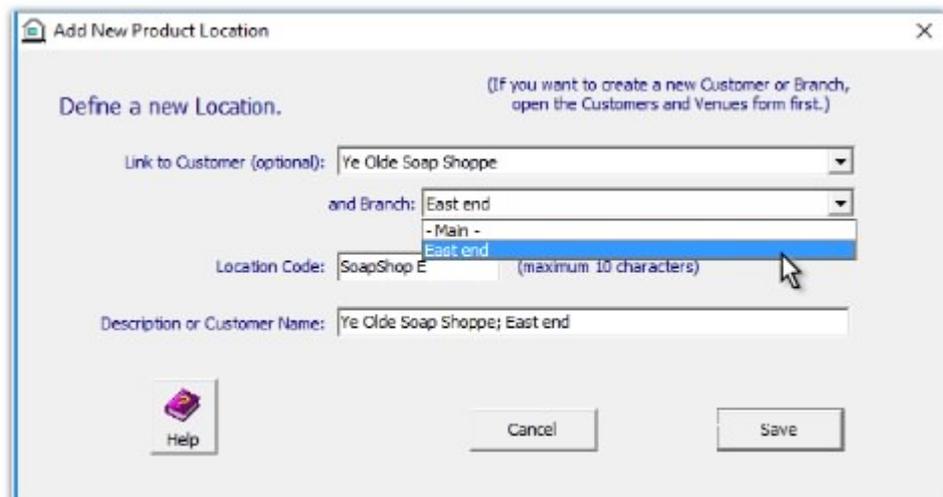
To open MyLocations (or bring it to the front if it's already open), select it from the main **Products** menu.



## Defining a New Location

To define a new location, click **New** on the toolbar. This will open the New Product Location dialog. You must enter a unique **Location Code**, and optionally you can **link** the location to a customer and branch by selecting from the drop-down lists.

If you select a customer, the location **Description** is automatically filled in with the customer and branch name - otherwise you can enter your own description (e.g. Warehouse #2).



When you sell products on **consignment**, you select the location on the [Sales Register](#) form, and if you have linked it to a customer, the customer name will automatically be filled in for you.

Click **Save** to finish.

Note that new locations can also be defined from the [Customers](#) report, and from the [New Transfer Record](#) form.

## Editing a Location

You can change an existing location's **code**, **description**, or linked **customer** and branch - select it from the list and click the **Edit** button on the toolbar (or right-click and choose **Edit Location** from the pop-up menu). Note: for the HOME location, you can only edit the description.

## Deleting a Location

To delete a location you don't need anymore, select it and click **Delete** on the toolbar (or right-click and choose **Delete Location** from the pop-up menu). You cannot delete the HOME location.

## Keyboard Shortcuts

**Ctrl-N:** Create a NEW item

**Ctrl-S** or **ENTER:** Save changes

**ESC:** Cancel changes

## Common Tasks

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This section of the manual provides guides for many of the **tasks** you can perform with SoapMaker. Click one for guidance with that task...

[Getting Started](#) - Step through a series of introductory topics to get an overview of the program.

[Initial Setup](#) - When getting started, you must do this before you can start entering your own data.

[Defining Custom Oils](#) - SoapMaker comes with more than 80 base oils, but you can add more.

[Recording Purchases](#) - to create your supplies inventory, or record other business expenses

[Creating a Recipe](#) - step-by-step guide

[Resizing a Recipe](#) - easy one-step to scale a recipe larger or smaller, or fit one of your molds.

[Sharing Recipes](#) -import and export recipes as text files

[Deleting Old Supply Items](#) - Unclutter your supplies stocklist by removing things you never use anymore

### **Pro** Professional Edition:

[Making a Product Batch](#) - builds your product inventory ready for selling

[Organizing Your Products](#) - using consistent naming conventions for easy reporting

[Cancelling a Batch](#) - in case you change your mind

[Creating Product Labels](#) - ingredient lists sorted by quantity with optional INCI codes

[Recording Sales](#) - create sales registers, manage your product inventory and print customer invoices

[Maintaining a Customer List](#) - with addresses and contact information

[Selling on Consignment](#) - product stock in multiple locations

[Recording Product Returns](#) - how to handle returns from your customers

[Viewing Sales by Region](#) - an easy way to filter your Invoices report

[Re-Using Your Products as Ingredients](#) - for imbeds, soap bases, or gift sets

[Accounting for Stock Removal](#) - for advertising, donations, personal use or write-off

[Correcting your Inventory](#) - how to make small corrections, or do an annual audit

[Deleting Old Batch Records](#) - speed up loading of MyProducts

[Capturing year-end stock inventory](#) - how to capture your supplies and products stock values at year-end

## Initial Setup

When you are ready to start using SoapMaker to create your own recipes, record supply purchases, and **Pro** track your inventory of supplies and products, follow these steps: (Note: If you are updating from Version 2.8, see [Importing Your 2.8 Database](#) instead.)

### First, delete the example data from the database

SoapMaker comes with example supplies, recipes, batches, purchase records, and sales records. Once you have familiarized yourself with the program using these examples, you can edit or delete any examples you don't want to keep.

To delete them, choose **Clear Data...** under the **File/Database...** menu, and select the types of data you want to delete.

**Warning: ALL data of the selected types will be deleted, so do not use this command if you have entered any data you want to keep!**

### Next, set up your Preferences

See [MyPreferences](#)

## Now, follow these steps in sequence...

1. Set up your Stock of Supplies - See [Supplies Setup](#)
2. Enter your favorite Recipes - See [Recipes Setup](#)
3. **Pro** Set up your Products stock - See [Products Setup](#)
4. **Pro** Complete the setup by adjusting your Supplies stock quantities  
See [Completing Setup](#)

## Supplies Setup

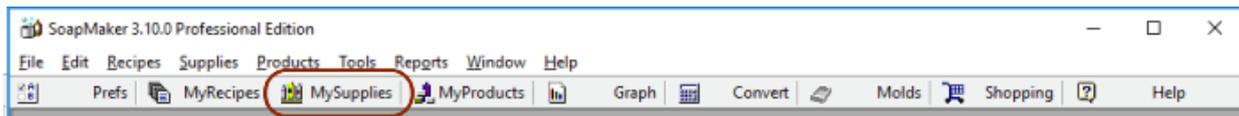
### Step 1. Defining your Supplies

Before you can create recipes, you need to define your ingredients, and record purchases to establish your costs and **Pro** set your initial supplies inventory.

To get started, make a list of all the ingredients and packaging items you use in your recipes. **Pro** If you have the SoapMaker **Professional** edition, also note the quantity remaining in your stock of each item.

Find receipts for the purchase of all these supplies, or if you do not have a receipt, make a note of the approximate cost.

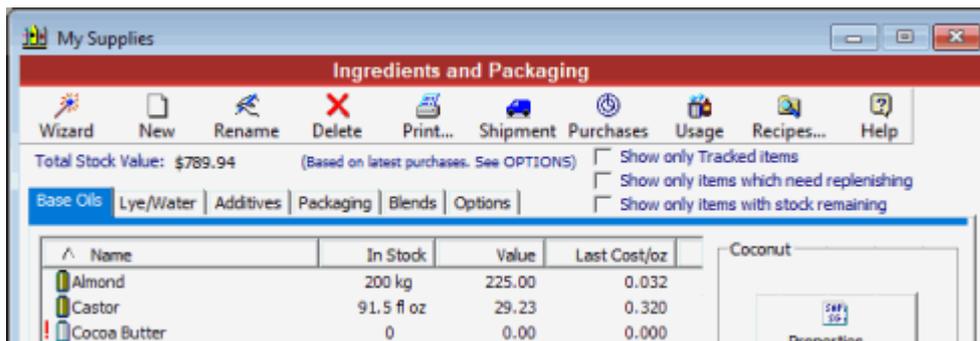
The first step, before recording purchases or creating recipes, is to **define** your ingredients in [MySupplies](#), your management center for ingredients and packaging items. To begin, open it by clicking the **MySupplies** button on the main toolbar...



There are 4 types of supplies, with a separate tab for each:

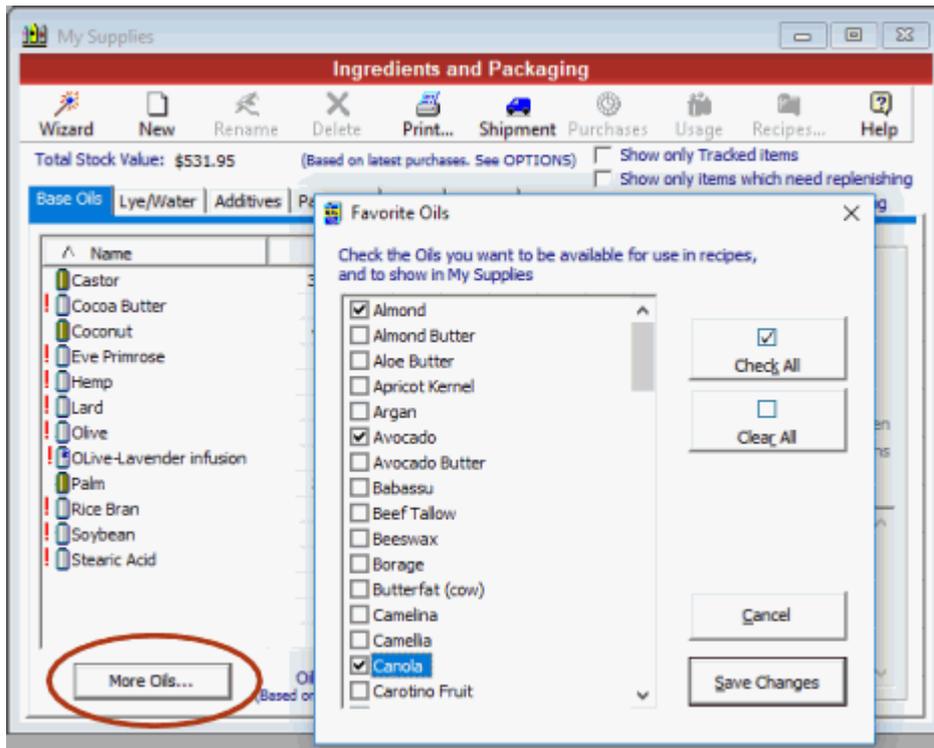
- Base Oils - these are all your saponifiable oils and fats
- Lye and Water
- Additives - all other ingredients such as scents, colors, etc.
- Packaging, etc. - product packaging items like bottles, wrappers, labels, and any items you include in your products which you don't measure by weight or volume.

When MySupplies first opens, the **Base Oils** tab is selected...



### Defining your Base Oils

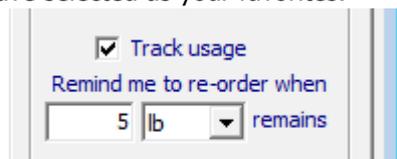
SoapMaker comes with more than 80 standard oils. To choose the ones you plan to use, click the **More Oils** button at the bottom of the window. This opens the **Favorite Oils** window. Make sure you have checked all the oils you use, and unchecked those you do not use (You can always change this later)...



Click **Save Changes**. Now the Base Oils list will show only those you have selected as your favorites.

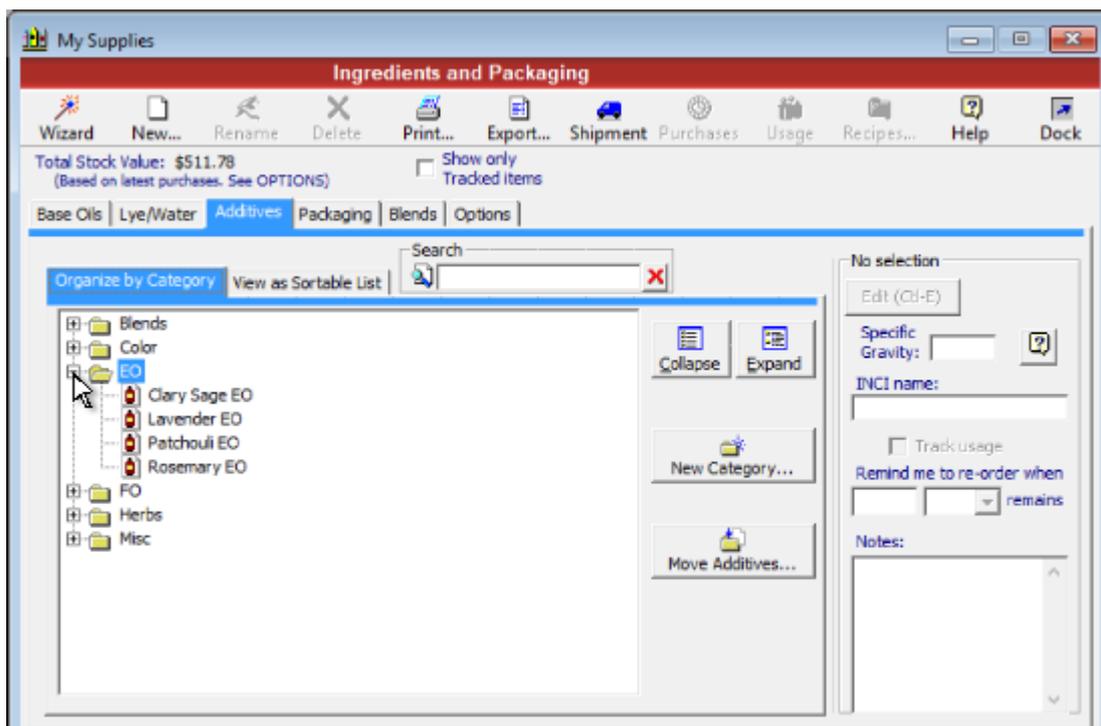
**Pro** If you want to track your inventory for each oil, make sure **Track Usage** is checked, and enter a re-order threshold if you want to be reminded when stock is getting low.

If you intend to use oils that are not included with the program, see the topic [Defining Custom Oils...](#)



## Defining your Additives

All ingredients other than Base Oils, Lye and Water, are managed in the Additives section of MySupplies. To begin, select the **Additives** tab, and then the **Organize by Category** tab.



SoapMaker comes with some sample recipes, and additives used in those recipes. If desired, you can keep these additives and categories, or you can delete or rename them.

**Note:** You cannot delete or rename the "Miscellaneous" Category. You cannot delete a Category that contains Additives. You cannot delete an Additive that is used in any saved recipes.

Create new categories by clicking the **New Category** button.

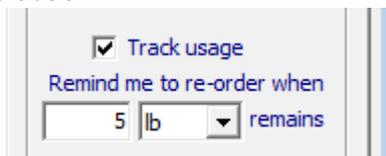
Rename any existing Category or Additive by selecting it and clicking **Rename** on the toolbar (or right-clicking and choosing **Rename** from the pop-up menu).

An existing Additive can be moved to a different Category by dragging it onto the Category icon. Or click the **Move Additives** button to move several at once.

An empty Category, or unused Additive, can be deleted by selecting it and clicking the **Delete** button.

When you have your Categories set up the way you want, create entries for each additive ingredient you use in your recipes:

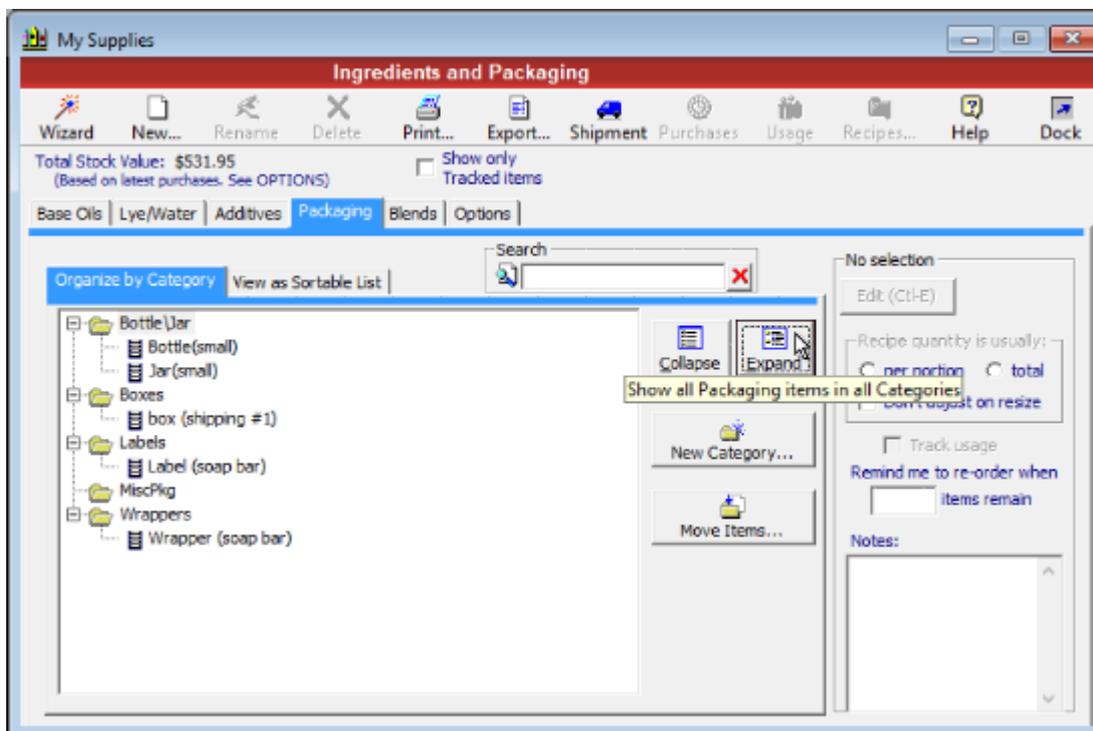
1. Select the appropriate Category, and click the **New** button on the toolbar (or right-click a Category and choose **New Additive** from the pop-up menu)
2. Enter the name of this additive. This is the name you will use when selecting it in recipes.
3. Enter the [Specific Gravity](#). Having the correct Specific Gravity is essential if you ever record purchases in volume units (e.g. gallons, fluid ounces, liters, ml). Click the link for more information.
4. Enter the [INCI name](#) if know it and need to provide it on your product labels.
5. **Pro** If you want to track your inventory for this additive, make sure **Track Usage** is checked, and enter a re-order threshold if you want to be reminded when stock is getting low.
6. Enter any special notes about this ingredient.



Repeat the above steps for each of your additive ingredients.

## Defining Packaging Items

In MySupplies, select the **Packaging** tab, and then the **Organize by Category** tab.



Create new categories by clicking the **New Category** button.

Rename any existing Category or Packaging item by selecting it and clicking **Rename** on the toolbar (or right-clicking and choosing **Rename** from the pop-up menu).

An existing Packaging item can be moved to a different Category by dragging it onto the Category icon. Or

click the **Move Items** button to move several at once.

An empty Category, or unused Packaging item, can be deleted by selecting it and clicking the **Delete** button.

**Note:** You cannot delete or rename the "MiscPkg" Category. You cannot delete a Category that contains Packaging items. You cannot delete a Packaging item that is used in any saved recipes.

When you have your Categories set up the way you want, create entries for each Packaging item you use in your recipes:

1. Select the appropriate Category, and click the **New** button on the toolbar (or right-click a Category and choose **New Packaging item...** from the pop-up menu)
2. Enter the name of this Packaging item. This is the name you will use when selecting it in recipes.
3. If this item is included with **each product** unit (e.g. a wrapper for a soap bar or a bottle for a liquid soap portion), then check the "per portion" option. If the item is only included **per recipe** (e.g. shipping container, or labor hour), check the "total" option, and if the total per recipe should not change when the recipe is [resized](#), check "Don't adjust on resize".  
(Note: The default options you set here can be overridden in a particular recipe).
4. **Pro** If you want to track your inventory for this packaging item, make sure **Track Usage** is checked, and enter a re-order threshold if you want to be reminded when stock is getting low.
5. Enter any special notes about this packaging item.

Repeat the above steps for each packaging item you include with your products.

## Record Purchases

Now you have your stocklists set up with the name of each base Oil, Additive, and Packaging Item you use, you can enter the data needed to calculate unit costs, and **Pro** quantity in stock for each item. You will need receipts for all your recent supply purchases, or at least some idea of what they cost, as well as the quantity remaining in stock. If you no longer have receipts, or do not want to bother entering a lot of old data, you can create a dummy purchase order just for the containers of supplies you have on hand to capture the cost of each.

After entering the quantities purchased for all your supplies, you will later adjust the stock remaining to match your actual stock quantities.

If you have a receipt or supplier invoice for a shipment of several items, you enter them all into a **New Supply Purchase** form as follows: (For single item purchases, use the same method and just enter the one item.)

1. In the appropriate MySupplies stocklist (Base Oils, Additives, or Packaging), select the first supply item from the supplier invoice.
2. Click the **Shipment** button on the toolbar, or double-click the item. This opens the [New Supply Purchase](#) form and fills in the name of the selected item. Fill in the form with all the items from the supplier invoice, the Supplier Name, the date of purchase, overhead costs such as shipping, and any notes you want about this order. Save the form.

**Note:** Be sure to set the date correctly for each order if you want to use SoapMaker to track your expenses for tax purposes.

3. Repeat steps 1 and 2 for each supplier invoice.

(If you have difficulty using the New Supply Purchase form, please see this topic: [Recording Purchases...](#) then come back here.)

Now MySupplies should show the correct **unit cost** for each supply item.

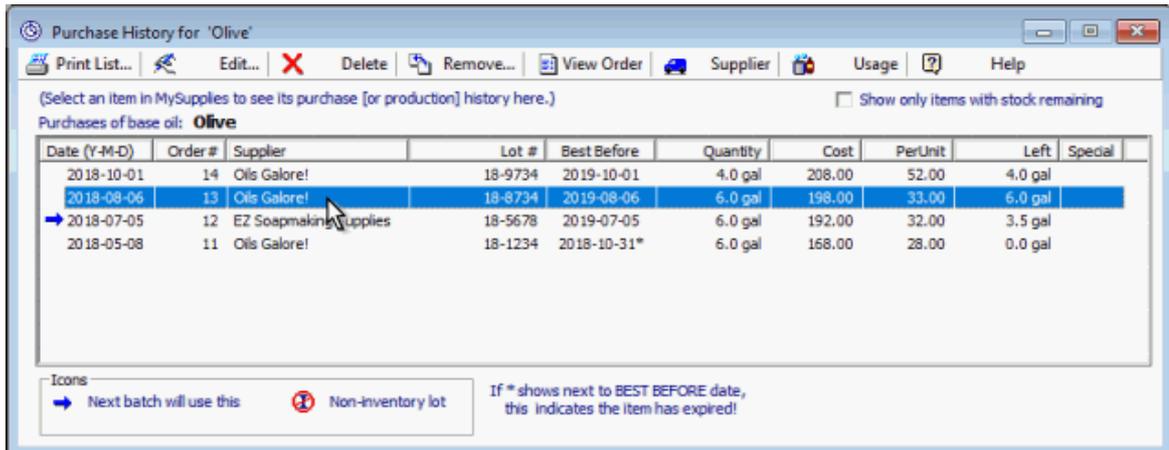
**Pro** However, the **quantity in stock** and the **value** will indicate the total purchased amounts, rather than your actual stock. If you have the SoapMaker **Professional** edition, you will correct this now...

## **Pro** Adjust Stock Quantities

With the list of all your ingredient and packaging item quantities in stock...

1. In MySupplies, select an item whose **In Stock** quantity is incorrect, and click **Purchases** on the toolbar. This will open the [Purchase History](#) report. All purchase records of the selected item are listed

here, with the most recent at the top. The blue arrow indicates the oldest purchase with stock still remaining.



2. Select the record that is incorrect, click **Edit** on the toolbar to enter the correct quantity. The first time you do this, you will see a message suggesting using the **Remove** button instead, but since you are just setting up, you can ignore this message and proceed with the edit.

You can leave the **Purchase History** window open and click another item in MySupplies to see its history. Repeat these steps for each supply item whose quantity is incorrect. When you are done, the stocklists in MySupplies should show the correct quantity in stock for all your supplies, and the stock value should reflect the costs of those supplies. (Note that you can set the option in MySupplies to calculate stock value using either of two methods.)

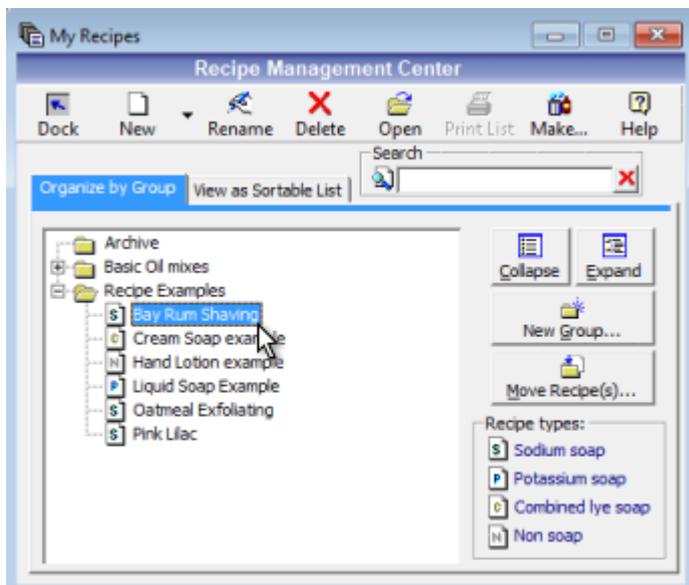
[<< Previous step](#)      [Next step >>](#)

## Recipes Setup

### Step 2. Entering your favorite Recipes

Now that you have set up MySupplies with the names and costs of all your ingredients and packaging items, you can enter all your favorite recipes into SoapMaker. You will need to enter all of the recipes you used to make products you still have in stock.

To begin, open [MyRecipes](#). If it is not already docked in the upper left corner of the main window, click the **Dock** button on the toolbar. This will leave room for recipes to open beside the MyRecipes window.



## Recipe Groups

Before starting to enter recipe contents, you may want to set up recipe **groups** to suit your needs. Create new groups by clicking the **New Group** button (You can always create or rename groups later).

Rename any existing group by selecting it and clicking **Rename** on the toolbar (or right-clicking and choosing **Rename Group** from the pop-up menu).

An existing recipe can be moved to a different group by dragging it onto the **Group icon**. Or click the **Move Recipes** button to move several at once.

An unwanted recipe or group can be deleted by selecting it and clicking the **Delete** button (or right-clicking and choosing **Delete...** from the pop-up menu). If you delete a group containing recipes, all its recipes will also be deleted.

**Note:** You cannot delete or rename the Archive group.

## Recipes

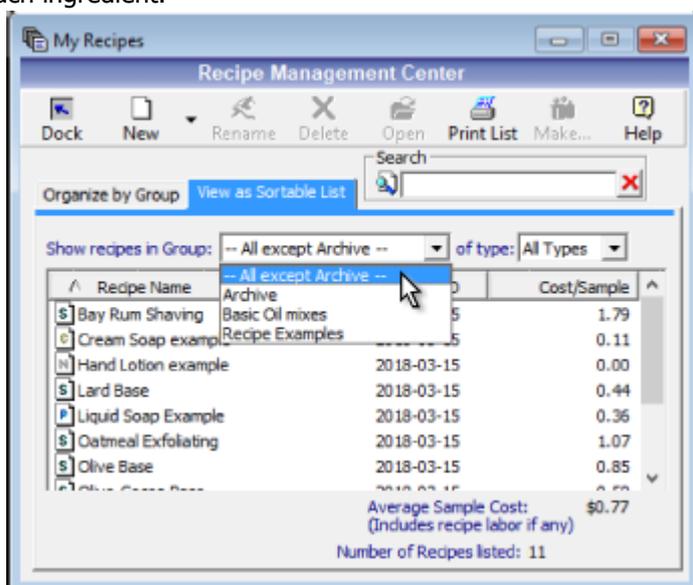
Before creating a recipe, you must have defined all the ingredients in MySupplies. If you haven't already done so, see the topic [Supplies Setup](#).

With your list of recipes and their ingredients handy, enter each one into SoapMaker:

1. Select the desired recipe **Type** from the drop-down list beside the **New** button on the MyRecipes toolbar. This will open a new blank Recipe Form. (For help creating a recipe, see this topic: [Creating a Recipe...](#) ; then come back here.)
2. Fill in the form with your recipe's ingredient names and quantities. Make sure the **Recipe Options** and **Portions** are set the way you want them. You can save the settings so all new recipes of the same type will start with the same defaults.
3. **Save** the recipe - you will be asked to give it a name and select a group (or create a new group).
4. Close the Recipe Form.

Repeat the above steps for each recipe.

When done, click the **View as Sortable List** tab in MyRecipes, and select **All Groups except Archive**. You should see all your recipes listed, showing each one's **Type icon**. If you recorded ingredient purchase in the previous step, the **cost per sample** for each recipe will be based on the most recent purchase of each ingredient.



[<< Previous step](#)      [Next step >>](#)

## Products Setup

### **Pro** Step 3. Creating your initial Products Stocklist

SoapMaker records your products as **batches** made with **recipes**. To set up your product stock records, you will use the [Make Batch](#) command for each recipe for which you still have product stock remaining. If you haven't yet created recipes for all your products, do this first as explained in the topic [Recipes Setup](#).

Before starting to populate your products stocklist, make a list of the product batches you have in stock, noting for each batch:

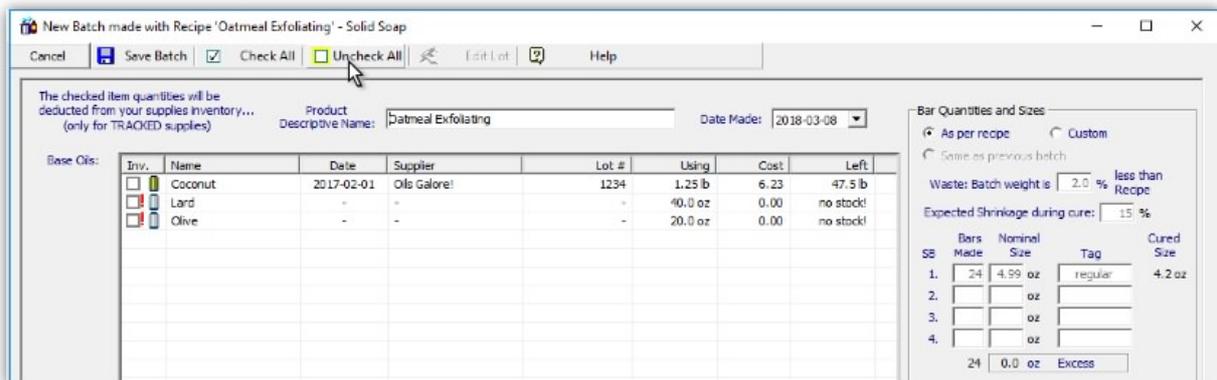
- The **size** (e.g. bar size in ounces, bottle size in fluid ounces). One batch may have up to 4 different sizes.
- The **quantity** in stock of each size
- The **recipe** used
- The **date** it was made

Each product must be assigned an identifier **Tag** related to its size or shape (e.g. Large, Medium, Small). If you split single batches into separate sub-batches of different sized products, each sub-batch must have a unique Tag within the batch. Tags are used to organize your [Price List](#), and can appear on customer invoices, so decide what Tags you will use (you can still change your mind later).

When you first create a recipe, the bar/portion sizes, quantities and Tags are set using the default values from your [Preferences](#). You can change them when you use the **Make Batch** command, or later after saving the batch, but if your recipe contains Packaging items, it's best to set these values in the recipe itself.

Open [MyRecipes](#), and with each recipe on your products list do the following steps:

1. Select the recipe in MyRecipes.
2. Click the **Make** button (or right-click and select **Make a Batch** from the pop-up menu). This will open the **New Batch** dialog:



3. In the New Batch dialog window...

- a) **IMPORTANT:** Click the **Uncheck All** button at the top, so the supplies used for this batch will **not** be deducted from your stock (since you have already corrected your stock values in a previous step).
- b) If desired, enter a **Product Description** different from the recipe name
- c) Select the **Date Made** from the drop-down calendar
- d) Adjust the [Waste Factor](#) if different from that specified in the recipe
- e) Edit the **Bars/Portions Made** and **Nominal Size** numbers if necessary to reflect what was actually made for this batch.
- f) If this batch had more than one size, define sub-batches as needed, adding a unique **Tag** for each.
- g) Edit the **Expected Shrinkage** percent if different from the value defined in your recipe.
- h) Click **OK**.

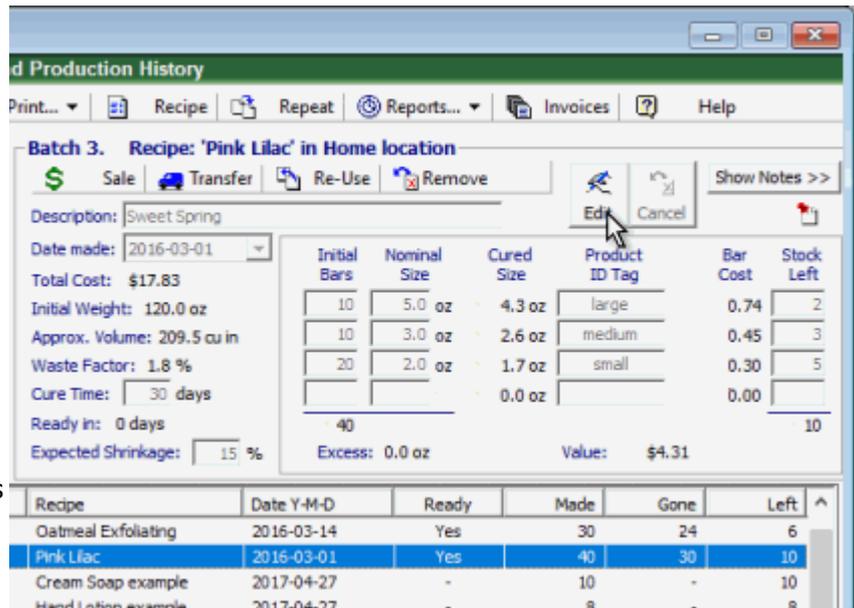
4. MyProducts will open and display the new batch record.

Since you told the New Batch dialog to **not** deduct stock, the product costs will be calculated based on your most recent ingredient purchase costs, instead of the costs of selected supply lots.

### Edit the Batch Details

In MyProducts, with the new batch selected, click the **Edit** button. Then:

1. Add any **notes** you wish about this batch (Click **Show Notes** to expand the window).
2. Change any other details if you did not set them correctly in the New Batch dialog.
3. Edit the **Stock Left** numbers to reflect what remains in your actual stock.
4. Click **Save**.



Repeat the steps above for each batch of products in your stock. When done, the Batch List in MyProducts should accurately show the status of all your products.

From now on, this status will be adjusted automatically whenever you make new batches or record sales.

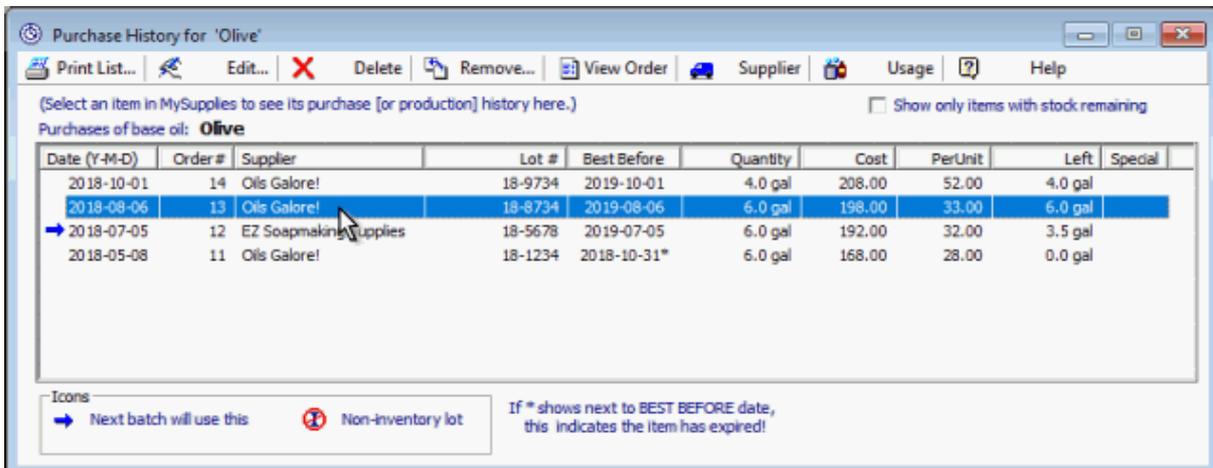
[<< Previous step](#)      [Next step >>](#)

## Completing Setup

### Pro Step 4. Completing Setup

Double-check your supplies stocklist quantities. If you forgot to click the **Uncheck All** button when making batches, supplies will have been deducted from your stock but you can adjust the stocklist quantities now to compensate as follows:

1. In MySupplies, select an item whose **In Stock** quantity is incorrect, and click **Purchases** on the toolbar. This will open the [Purchase History](#) report. All purchase records of the selected item are listed here, with the most recent at the top. The blue arrow indicates the oldest purchase with stock still remaining.



2. Select the record that is incorrect, click **Edit** on the toolbar, and enter the correct quantity. You can leave the **Purchase History** window open and click another item in MySupplies to see its history. Repeat these steps for each supply item whose quantity is incorrect. When you are done, the stocklists in

MySupplies should show the correct quantity in stock for all your supplies.

[<< Previous step](#)

## Defining Custom Oils

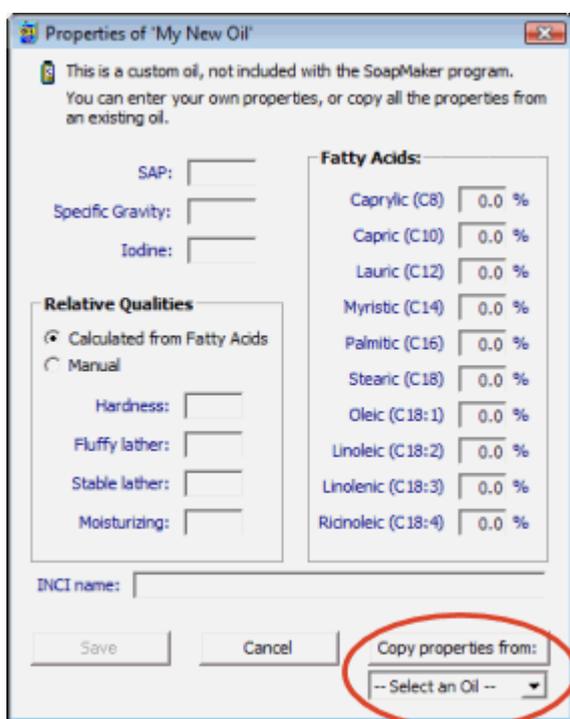
Before defining a custom oil, make sure it is not already included with the program by clicking the **More Oils** button in [MySupplies](#).

If you use an oil which is not one of the standard oils provided with SoapMaker, you will need to find information about that oil, including at least the [SAP value](#) and the [Specific Gravity](#) (density) (Click these links for more information). You may be able to get this information from your supplier, or find it by searching online.

When you are ready, click the **New** button on the MySupplies toolbar, and enter the oil's name.



The **Oil Properties** window will open so you can enter all the properties of this oil.



**Important:** SAP values are often specified for KOH instead of NaOH, and may be in different units than SoapMaker requires. If you are unsure about how to enter the **SAP value**, please see the topic [Understanding SAP Values](#) which explains how to convert to the correct value. If the SAP value is not correct, your soap recipes will fail!

Having the correct **Specific Gravity** is essential if you ever record purchases in volume units (e.g. gallons, fluid ounces, liters, ml), or resize recipes to fit a mold.

The **Iodine** and **Fatty Acid** values are important if you want an accurate prediction of your soap qualities, unless you choose to enter quality values manually based on your own experience or alternative data.

If you don't know what some properties are, you can copy the properties of a similar standard oil by selecting one from the drop-down list and clicking the **Copy Properties** button. Then make any changes necessary to suit this new custom oil.

When you have finished, click the **Save** button.

## Recording Purchases

### New Supply Purchase or Expense Form

Each time you receive a shipment of supplies, or purchase any item, record the purchase using this form. The unit cost (used in calculating recipes costs) will then be based on the latest purchase. You can also use this form to record any other expense associated with your business. You can use this form to record a single purchase, or many items included in a shipment.

**Pro** If you have the **Professional** edition, your supplies stocklist will reflect the new total quantity of each item.

Before you can record purchase of an ingredient, it must be defined in MySupplies - to do this ahead of time, see this topic for instructions: [Defining Supplies...](#) You can also define new supply items while working in the New Supply Purchase form - if you type a name which is not recognized, you will be asked if you want to define a new supply item.

To open the New Supply Purchase form, do one of the following:

- Select an item in MySupplies and click the **Shipment** button on the MySupplies toolbar, or
- **Double-click** the item in MySupplies, or
- choose **Record New Purchase...** under the main **Supplies** menu.

When you add an item from MySupplies, its name and category will be filled in for you.

To add more items, you can...

- **Double-click** another item in MySupplies
- **Select** Category and Name from the drop-down lists
- Just start **typing** a Category and Name - it will be auto-filled with the best match

Here's an example of the form with 4 items listed. The selected item is shown in the entry boxes at the top of the list where it can be edited - here the 4th item 'Lavender EO' is selected and the values can be seen in the upper entry boxes.

The screenshot shows the 'Editing Previous Supply/Expense Order' window. At the top, there are menu options like 'Cancel', 'Save & Close', 'Save; New', 'Finish Later', 'Show Tips', and 'Help'. Below that, there are fields for 'Order #: 2', 'Supplier: EZ Soapmaking Supplies', 'Supplier Invoice #: 6543', and 'Date: 2020-12-28'. There are also checkboxes for 'Item costs include overhead' and buttons for 'New Item (Ctrl-N)', 'Delete Item', 'Save Item (ENTER)', and 'Cancel entry (ESC)'. The main area is a table with columns: Item Number, Category, Name, Lot Number, Best Before, Containers (Number, Size, Units), Price per Container, Total Quantity, Total Price, Adjusted Cost, Unit Cost, and Not for Business. The 4th item, 'Lavender EO', is selected. Below the table, there are status indicators (I, N, S), list icons (warning, info, error), notes, and a summary section with various cost calculations.

| Item Number | Category | Name               | Lot Number | Best Before | Containers  | Price per Container | Total Quantity | Total Price | Adjusted Cost | Unit Cost  | Not for Business         |
|-------------|----------|--------------------|------------|-------------|-------------|---------------------|----------------|-------------|---------------|------------|--------------------------|
| 4           | EO       | Lavender EO        | 74563      | 2021-12-31  | 2 250 ml    | 48.50               | 500 ml         | 97.00       | 108.13        | 0.22       | <input type="checkbox"/> |
| 1           | Base Oil | Palm               | 4893       | 2022-07-01  | 1 10 lb     | 19.00               | 10 lb          | 19.00       | 21.18         | 2.12/lb    | <input type="checkbox"/> |
| 2           | Base Oil | Castor             | 89432      | 2022-09-10  | 2 28 fl oz  | 17.50               | 56 fl oz       | 17.50       | 19.51         | 0.35/fl oz | <input type="checkbox"/> |
| 3           | Wrappers | Wrapper (soap bar) |            |             | 1 200 items | 4.50                | 200 items      | 4.50        | 5.02          | 0.03/item  | <input type="checkbox"/> |

Summary section:

- Materials total price: 138.00
- Other Expenses total: 138.00
- Total Price: 138.00
- Less Supplier Discount: [ ]
- Plus Shipping: 8.50 \*
- Plus Other Overhead: [ ] \*
- Amount billed: 146.50
- Exchange rate: 1
- Amount in my currency: 146.50
- Tax Group: Tax1(credit): 14.65
- Default Tax2(cost): 7.33
- Customs/Brokerage: [ ]
- Total Order Cost: 168.48
- Total Business Cost: 153.83

## Materials and Packaging

- For each item in the shipment, select or type its **Category** and **Name**. If desired, enter the manufacturer's **Lot Number** and the **expiry** or 'best before' date. (You can leave these blank if you don't want to bother tracking them - for more information see the topic [Supply Lots](#).)  
If an order includes several containers of the same ingredient and they have different lot numbers, enter a separate line for each lot. **Pro** Note that the first entry of that ingredient is considered the 'oldest' lot in the order, and by default will be used first when making a product batch.
- Enter the number of containers, and the size of each container - the total quantity will be calculated. Enter either the **price per container**, or the **total price** of this item.  
**NOTE: If you record a purchase in volume units (e.g. ml or fl oz), it is important to have set that ingredient's specific gravity (SG) correctly because internally SoapMaker always saves unit cost as cost per gram, even if you choose to record or display it in volume units. If the SG is wrong, the conversion from the volume units to grams will be wrong, and so will the unit cost.**
- When finished entering an item, press the ENTER key on your keyboard to start another (or double-click one in MySupplies). Or if you have clicked somewhere else in the form, click the **New Item** button to start another.
- For packaging items, note that the **Number of Containers** and **Container Size** fields refer to the boxes in which the items are shipped, not the items themselves. See the **Wrappers** example in the screen shot above.
- **Pro. Not for Business** checkbox - this serves two purposes:
  - If the shipment includes an item from your supplies list which is **not** intended for making products (e.g. you ordered some cooking olive oil from your soap supply house), check the **Not for Business** box for that item. You can include items like this so that the adjusted costs of the inventory items in the shipment will be correct.
  - Check this box for ingredients that have a cost, but don't need to be **tracked** in your inventory (e.g. tap water or herbs from your garden). For these, you can enter any quantity for calculating the unit cost. If you use it for this purpose, it's important to understand how SoapMaker calculates your year-end costs...  
On the [Tax and Income Summary report](#), if you select the option to 'Use total purchase amounts during the period', then any purchases flagged as Not for Business will **not** be included in the total costs. But if you select the option to 'Use actual cost of supply lots used for sales', and you have sold products made with ingredient lots whose purchase was flagged as Not for Business, your costs **will** include these items.

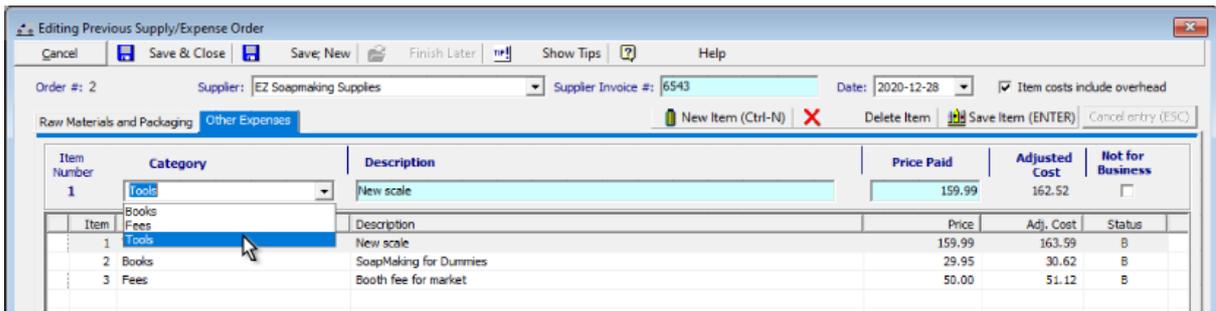
The **Total Business Cost** at the bottom of the New Supply Purchase form does not include any items which are flagged Not for Business, and those purchases will not affect the stock quantity or value of the item displayed in MySupplies.

- **Special Price** checkbox - If you purchase something on sale and don't want it to affect your recipe costs or unit cost in MySupplies, check this box.

## Other Expenses

Click the **Other Expenses tab** to record business expenses which do not affect your supplies inventory. These can be things like tools, books, or even rent or phone bills. Choose a **category** from the drop-down menu, or just type a category. If this is a new category, you will be asked to confirm.

You can include items which are not intended for your business, but were in the same shipment with business items - in this case check the **Not for Business** box so the **Total Business Cost** for the order will not include this item.



## Overheads and Adjustments

At the bottom of the form, you can enter taxes and any overhead costs or adjustments as part of this order.



- Choose the applicable **Tax Group** from the drop-down list, and enter [sales tax](#) or value-added tax amounts paid. If you want to define a new tax group, select **Edit Tax...** to open MyPreferences and add or change taxes.
- Based on the tax group, you can see whether the tax amount can be claimed as a credit, or will be included in the total cost.
- Enter any **Notes** about this shipment.

You have the option to distribute **overhead costs** proportionally to each item as shown in this example, or keep the overhead costs separate so they don't affect individual item costs. **Pro** The choice will affect the way your business costs are calculated for tax purposes, so you should choose the desired option and make it the default for all future purchase orders for consistency. For a discussion of this option, see the topic [Overhead Costs](#).

When finished, click the **Save and Close** button. The unit cost of each item is now based on the latest adjusted purchase cost (except for items marked 'special price'). New purchase records are added to the [Purchase History](#) of each shipment item. **Pro** The newly purchased quantities are added to your supplies stock.

The shipment details can be viewed in the [Supply Orders Report](#). From there, you can also **edit** the order if you made a mistake when entering data.

Individual items from this and all other orders can be seen in the [List of All Purchases](#) report.

## Supplier Information

Before saving the form...

1. Select the **supplier** from the drop-down list, or choose **+New Supplier..** to record a new one in your [Suppliers List](#).
2. Enter the supplier's **Invoice Number**, and change the **date** if necessary by selecting the shipment date from the drop-down calendar.

## Toolbar Buttons

The main toolbar provides the following command buttons:

|                         |   |
|-------------------------|---|
| <b>Cancel</b>           | Close the form without saving anything.   |
| <b>Save &amp; Close</b> | Save all your data and close the form.  |
| <b>Save, New</b>        | Save all your data, and start a new blank order.  |
| <b>Finish Later</b>     | Save your partially entered data and close. Next time you open the New Supply Purchase form, it will resume with the same data. |
| <b>Show/Hide Tips</b>   | Show tips for using the form effectively, or hide the tips when done.   |
| <b>Help</b>             | Opens this manual page.   |

The toolbar associated with the data entry fields provides these commands (with keyboard shortcuts as shown):

|                     |        |  |
|---------------------|--------|--|
| <b>New Item</b>     | Ctrl-N | Starts a new blank item for data entry.  |
| <b>Delete Item</b>  | N/A    | Delete the currently showing item.   |
| <b>Save Item</b>    | ENTER  | Save the current data entry fields. If you were working on a new item, then another new item will be started. If you were editing an existing list item, the next item in the list will be selected. |
| <b>Cancel Entry</b> | ESC    | If you were editing an item, this will restore the previous values.  |

## Status Indicators

The listed items each show a **Status** in the right-most column.

For Raw Materials and Packaging items:

**I** - this is an inventory item

**N** - this is not for business, and will not affect the business cost total, or show stock quantity in MySupplies.

**S** - you have flagged this as a special price, and it will not affect unit costs in recipes or MySupplies.

For Other Expense items:

**B** - this expense item is a business expense

**N** - this is not a business expense, and will not affect total business costs.

In the left margin of the list, you may see an **Icon** with meaning explained in the legend.

## Correlating your records

Whenever you record purchases, a **Supply Order Number** is assigned automatically in sequence. It is a good idea to label your supplies with the date of purchase and the order number so you can correlate them with the records in the [Supply Orders](#) and [Purchase History](#) reports.

## Small screens

If your screen is too small (or you have your resolution set too large) to show the entire form, scroll-bars will appear at the bottom and/or at the right side of the main window so you can move it to see the hidden portions.

## Related Topics

[MySupplies](#) - Supply stocklists

[Sales Tax](#) - Setting up and using SoapMaker's Tax features

[Suppliers List](#) - Name and contact information for all your suppliers

[Purchase History Report](#) - List of purchases for a selected supply item

[Supply Orders Report](#) - View contents of past shipments

[List of All Purchases](#) - Lists individual purchased items

[Supply Lot Numbers](#) - Recording and tracking supply lots

[Overhead Costs](#) - The pros and cons of each option for handling overheads

## Overhead costs

When recording a purchase of supply items or other expenses, you can specify **overhead costs** in addition to the prices of individual items.

These overheads include:

- Shipping cost
- Any sales tax which you cannot claim as a credit
- Customs/brokerage fee paid for imported shipment
- Any other overhead which can be considered a valid business cost

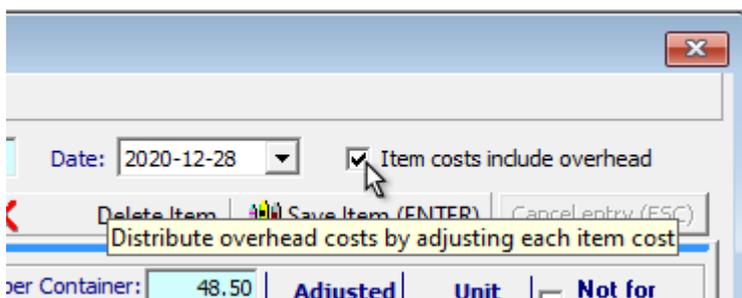
SoapMaker offers two methods for accounting for these overheads:

1. Distribute the overhead costs proportionally by adjusting the cost of each item in the order (both materials and other expense items), or
2. Treat the overhead costs as separate business costs, shown on the [Tax and Income Summary report](#) **Pro**

Differences between the two options:

| <b>1. Distribute Overheads by adjusting item costs</b>  | <b>2. Keep Overhead Costs separate</b>   |
|---|--|
| Supply item costs and recipe costs may more accurately reflect your total costs   | Supply item costs are only adjusted to distribute any supplier discount on the order   |
| Distributing overheads proportionally may distort the true costs of individual items. (e.g. one heavy item could result in a large shipping cost component for each item's adjusted cost)                             | Item costs and recipe cost will reflect the actual price of each item  |
| If an order includes both business cost items and non-inventory supplies or non-business expenses, only the business items' share of overheads will be included in total business costs in the Tax and Income Summary | The total overhead costs for an order will be shown as a business cost if the order contains at least one business item, even if the order also contains non-business items. |
| Overhead costs will be lumped together with material costs for tax purposes   | Tax treatments can be different for material costs and overheads such as shipping or sales tax.  |

You can set your preferred default option for all new supply orders in [MyPreferences](#), and you can override the default in a particular supply order by setting the option on the [New Supply Purchase or Expense form](#) toolbar. (It is recommended to use the same option for all your purchases.)



To set the desired option when recording a new supply order, check or uncheck the box labeled **Item costs include overhead** at the top right of the form. If you choose the opposite option from the default saved in your preferences, you'll be asked if you want the new choice to become the default for future orders.

You can also set the default option

directly in [MyPreferences](#) on the Production and Taxes tab.

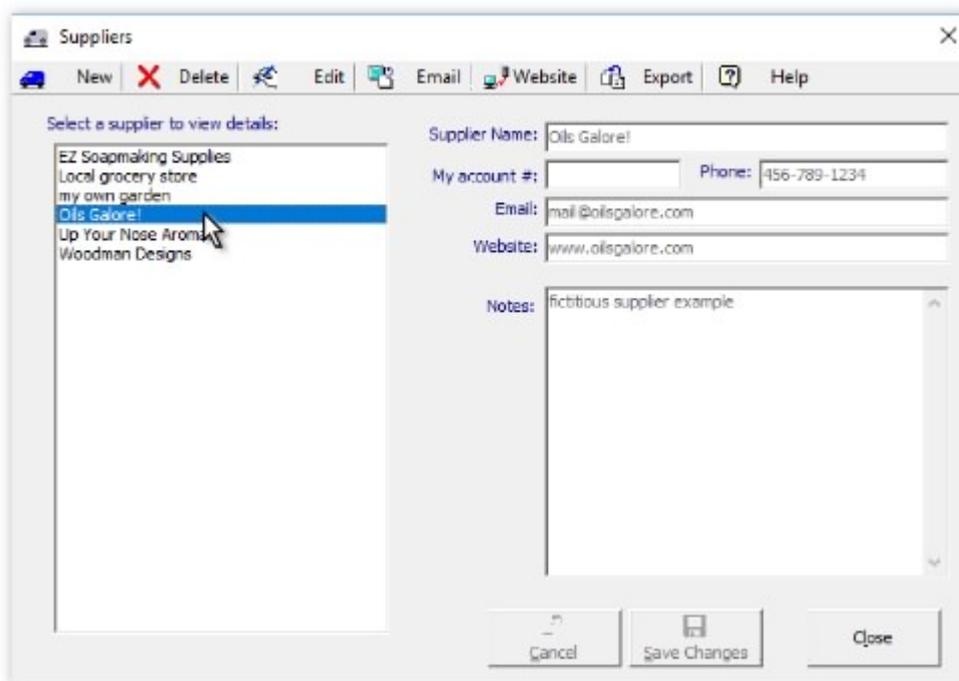
## Suppliers List

This report lists all your **Suppliers** with contact information. From here you can add new Suppliers, or edit the information for an existing one. Whenever you record new purchases, you can select the supplier from this list.

To open the report, select **Supplier List** under the main **Supplies** menu.

You can also open it from the [Purchase History](#) or the [Usage History](#) reports. This will open the Suppliers List and highlight the supplier who sold you the selected purchase lot.

This example shows the supplier "Oils Galore!" selected. The contact information and your notes about this supplier are displayed on the right.



If you have entered a valid web address, clicking the **Website** toolbar button will open your browser and connect to the supplier's website. Similarly, if the selected supplier has an email address, the **Email** button will open your default email client and begin a new message addressed to the supplier.

## Toolbar and other Command Buttons

**New** - Enter a new supplier name and contact information

**Delete** - Delete the selected Supplier from the list

**Edit** - Make changes to an existing Supplier's name or information

**Email** - if the selected supplier has an email address, this will open your default email client and begin a new message addressed to the supplier.

**Export** - Save the entire suppliers list as a CSV file that can be opened with a spreadsheet

**Website** - If you have entered a valid web address, this will open your browser and connect to the supplier's website.

**Help** - Open the Users Manual to the page describing this report

**Save Changes** - Save new supplier, or changes made to an existing one

**Cancel** - Don't save the changes you just made.

**Close** - Close the Suppliers List window

### Shortcut

Press the **Esc** key to close the window.

### Supply Lots

#### Pro Recording and Tracking Supply Lot Numbers

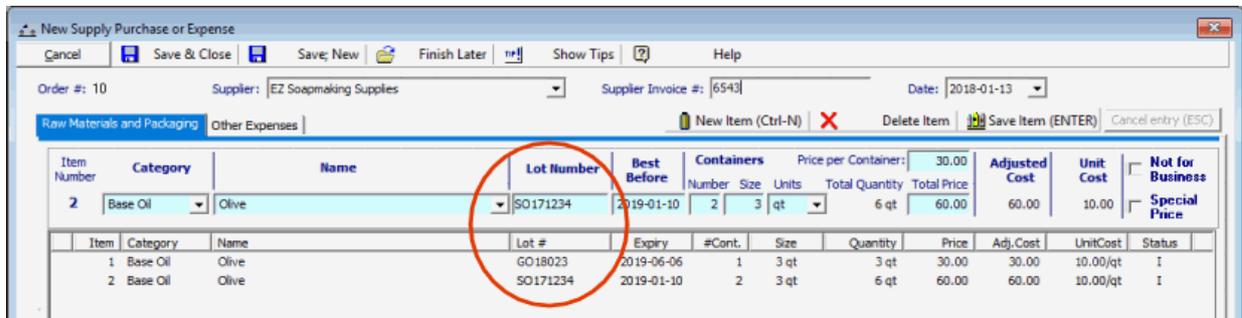
Just as you make your products in 'batches', manufacturers of your raw materials also make batches. In SoapMaker, these supply batches are called **Supply Lots** to avoid confusion with your own product batches. When you purchase raw materials, they will generally have a **Lot Number** stamped on the container. Perishable ingredients may also have an **expiry** or 'best before' date marked.

In some jurisdictions, it is required that you be able to track which supply lots are used to make each of your products. Even if this is not required, it may be a good idea. By doing this, you will be able to handle a case where one of your supply manufacturers is forced to recall particular lots because of substandard quality or other problem.

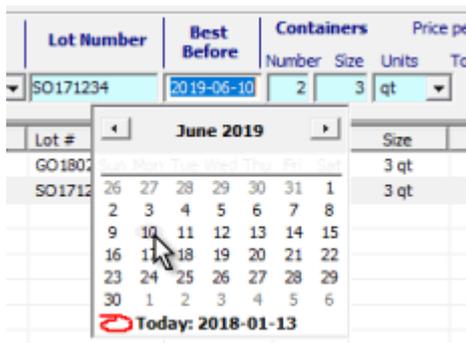
SoapMaker provides the tools which enable you to track individual supply lots right through your entire process, including sales to your customers.

#### Recording Supply Lot Numbers

When you record a new supply purchase using the [New Supply Purchase Form](#), you can enter the **Lot Number** for each item. If an order includes several containers of the same ingredient and they have different lot numbers, enter a separate line for each lot...



In this example, an order of Olive oil is separated into two lots with different lot numbers. You may want to include an abbreviation of the **Brand** with the **Lot Number** as shown here - the way you use this field is up to you. Or you can just leave it blank if you don't want to bother with Lot numbers.



You can also enter the **expiry** or 'best before' date using the pop-up calendar. If you enter a date, SoapMaker will highlight ingredients with expired lots in [MySupplies](#) and the [New Batch](#) dialog.

#### Tracking Supply Lots

The lot numbers you enter when recording supply purchases will appear in the following reports:

- [Purchase History](#) - lists each purchased lot of a particular ingredient
- [Supply Orders](#) - lists all purchase orders, and shows contents of a selected order

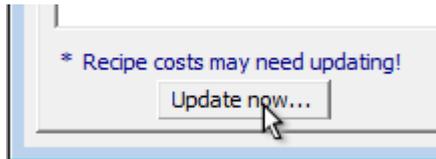
- [Usage History](#) - lists all product batches made with a particular ingredient, and optionally with a particular lot. For each batch shown, you can use the [Sales History report](#) to show sales to individual customers.

Using these, you can track individual supply lots all the way through your product sales to particular customers. For more information about this, see the topic [Recalls](#).

## Updating All Recipes

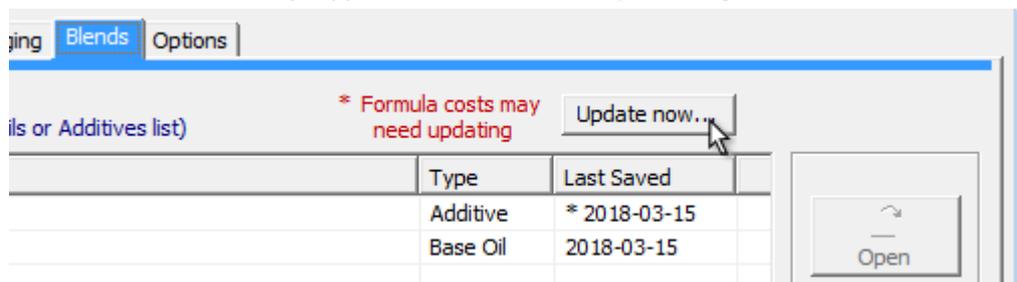
Whenever you [record a purchase](#) of new supplies, SoapMaker re-calculates the **unit cost** of each affected ingredient or packaging item using the latest purchase cost. Any saved recipes using the affected items will not reflect the latest costs until they are updated.

After changes have been made in MySupplies, SoapMaker may present an offer to update your recipes (unless you have chosen to suppress these reminders).



Also, the List view in MyRecipes will show a message and **Update Now** button. Updating saved recipes will ensure the sample costs shown in MyRecipes are current.

Like recipes, Blend formulas may need updating to reflect new ingredient costs or properties. In this case, the Blends List view in MySupplies will show a message and **Update Now** button.



Clicking the **Update now** button in either MyRecipes or MySupplies will begin updating any blends and recipes that need it. The blend formulas are updated first because this may change the unit cost of the blended ingredient, which will then require updating any recipes which use that blended ingredient. If some blend formulas contain other blended ingredients, two or more stages of blend updating may occur before recipes can be updated.

You can also have SoapMaker update your blends and recipes by selecting **Update Recipes...** under the main **Recipes** menu. You can choose to include or skip recipes in the [Archive](#) group.

Updating all recipes may take a minute or two, depending on how many recipes are affected by recent changes. If you find it is taking too long, you can **cancel** the process and update the remainder later.

Note: After updating, your recipes show ingredient costs based on the most recent purchases. However, when you record product batches, the batch cost is based on the actual costs of the individual supply lots used, and so may differ from the recipe costs if some lots were not the most recent purchased.

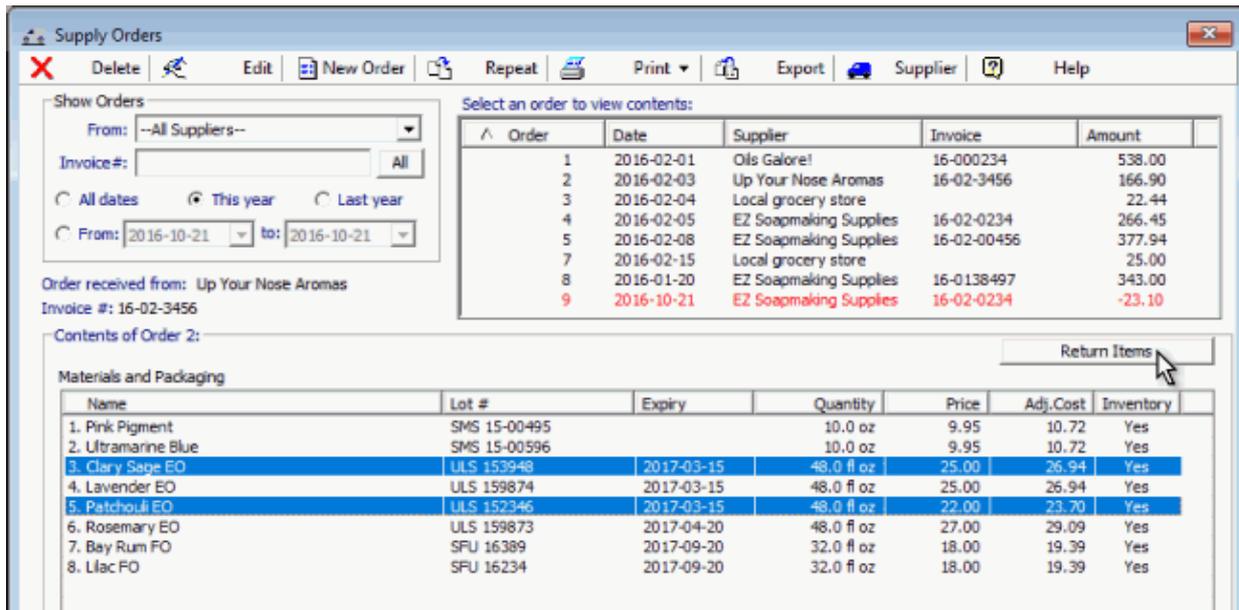
## Returning Supply Items

**Pro** From the [Supply Orders Report](#), you can select items to be **returned** to the supplier. This feature will create a 'return order' linked to the original purchase order. It will also reduce your inventory accordingly, and re-calculate your business costs and sales tax as shown in the [Tax and Income Summary](#) report. (You can also use this feature to make corrections to a supply order when you can no longer edit the order because some of its lots have already been used to make batches.)

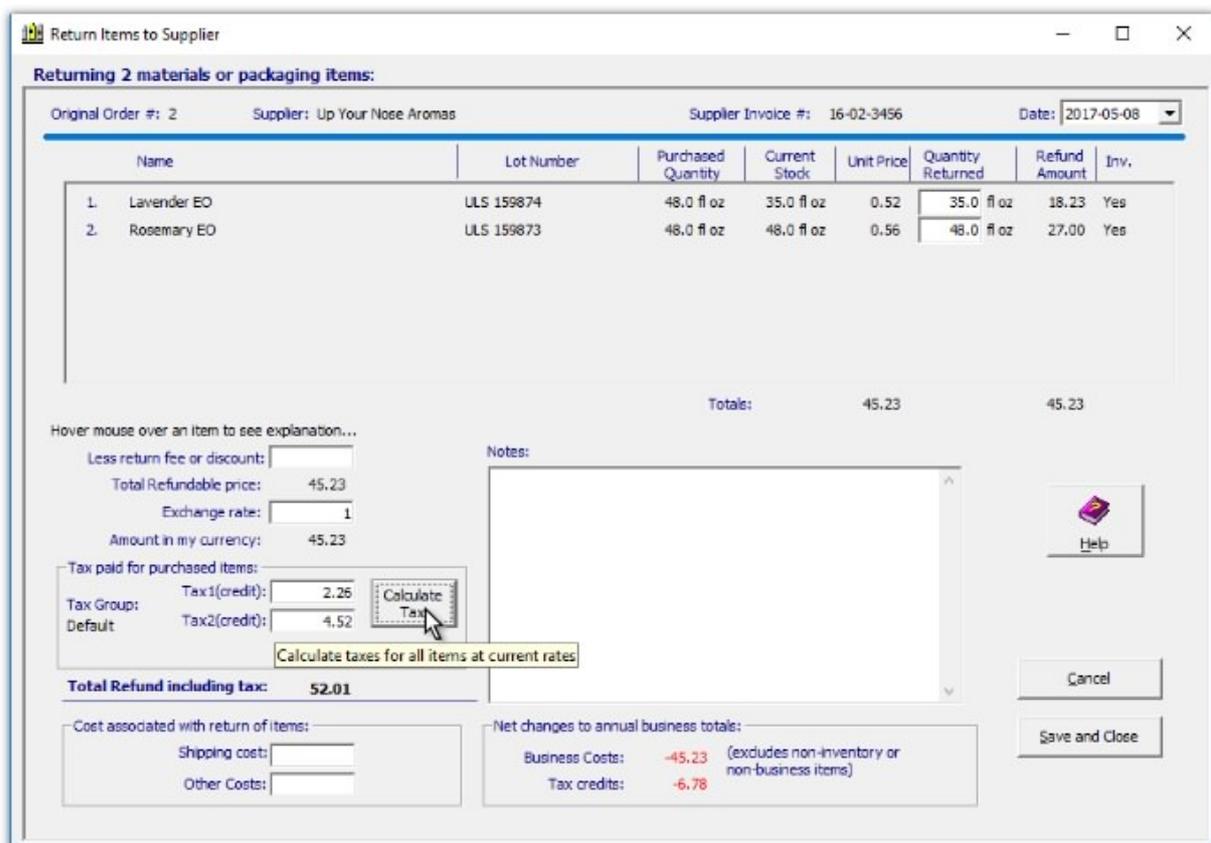
To use this feature, select the purchase order from the Supply Orders list, and then select one or more items from the Contents list. Use shift-click to select a block of items, or Ctrl-click to select multiple individual items as shown in this example.

Note: If you need to return both **Materials** items and **Other Expense** items from the same order, you will have to create two separate return orders, since you cannot select items from both lists at the same

time.



Click the **Return Items** button above the Contents list. This will open the Return Items dialog...



For each item selected from the original order, you can see the **purchased quantity**, the **current stock**, and unit **price**. You can choose to return the full current stock quantity, or return only a portion - the **refund amount** will be calculated accordingly.

In the lower left are various fields for specifying overheads associated with the order:

**Return fee or Discount**

If you received a discount on the original purchase, enter it here. If you are returning only part of the original order, you will have to calculate the appropriate discount. If you have to pay a fee to return something, include

this amount here.

- Exchange rate** If the order was purchased from a different country in foreign currency, enter the exchange rate.
- Tax Paid** If all items being returned are taxed at the same rates, just click the **Calculate Tax** button. Otherwise, you will have to figure the taxes yourself and enter the amounts.
- Cost associated** Enter shipping costs, and any other costs you incur by returning these items.
- Net changes to costs** These take into account the proceeds from receiving the refundable amount, your shipping or other costs, and the taxes that are refunded.

You can enter any notes you wish about this order. When ready, click the **Save and Close** button. This will create a new **return order** in the [Supply Orders report](#), adjust your supplies inventory to reduce your stock by the amounts returned, and adjust your taxes and supply costs as shown in the [Tax and Income Summary](#).

Return Orders are shown in **RED** in the Supply Orders report list.

## Related Topics

[Supply Orders Report](#)

[Purchase History Report](#)

## Creating a Recipe

### Overview

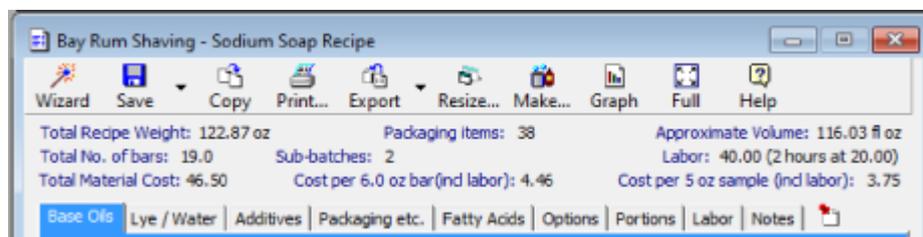
To create a new recipe, or view an existing one, you open a **Recipe Form** from MyRecipes...

To create a new recipe, click the **New** button and choose the recipe type. To open an existing recipe, double-click it in MyRecipes, or select it and click the **Open** button.

You can make **soap** recipes and **non-soap** recipes. (Note: For "melt and pour" soap using ingredients that have already been saponified, or if you have pre-made soap base products to be reused as ingredients, use the **non-soap** recipe type.)

At the top of every Recipe form is a toolbar with buttons for recipe-related [commands](#). Hover your mouse cursor over any button to see a pop-up description of what the button does. Some commands can also be accessed from the main menus.

If you are learning the program and want guidance, click the **Wizard** button for step-by-step instructions. If you no longer need this, click the button to hide the Wizard pane.



Below the toolbar is a **summary area** which displays the following information:

- **Total Recipe weight** - the total weight of all ingredients (optionally adjusted to allow for water evaporation during processing).
- **Packaging items** - total number of packaging items included with the recipe.
- **Approximate volume** - total volume of the recipe, calculated from the weight and [specific gravity](#) of each ingredient. (Note: the actual volume may be greater than this number if mixing the recipe ingredients introduces entrapped air)

- **Total No. of bars/portions** - the total number you have specified for the recipe.
- **Sub-batches** - you can divide the recipe into sub-batches (maximum 4) with different sized bars/portions.
- **Labor** - if desired, you can specify the hours needed to make this recipe, and your labor rate so you can see the labor cost here.
- **Total Material Cost** - calculated from the quantity and cost of each ingredient and packaging item included in the recipe. This does not include the labor cost.
- **Cost per bar/portion** - Cost for a single bar or portion, based on your settings on the Portions tab. If you have specified multiple sub-batches with different sized bars/portions, only the first one is shown in this summary area. The labor cost if any is included.
- **Cost per sample** - A standard sample size enables you to compare the cost of different sized recipes in the MyRecipes list. You set the sample size in your [Preferences](#). Labor cost if any is included in the sample cost, as well as any packaging items from the first sub-batch.

Below the Summary area is a set of **tabs** for accessing different pages of the recipe form. In the picture above, the **Base Oils tab** is selected.

The first step is to set your **Options** for preferred units by clicking the [Options tab](#).

Recipes can be either 'soap' or 'non-soap' - the Tabs and form layouts for each differ somewhat as described in the related topics:

[Soap Recipes](#) - Used for any soap that includes lye in the recipe

[Non-Soap Recipes](#) - Used for products other than soap, or for Melt & Pour soap

## Window stuff and Shortcuts

You can move a recipe form by dragging the top. You can resize it vertically by dragging the lower edge. SoapMaker will remember the height the next time you open any recipe of the same type.

If ingredient names are too long to display completely, you can stretch the window horizontally by dragging an edge.

Press **Ctrl-T** on your keyboard to select the next Tab.

If you prefer to see all ingredients at once, click the **Full** button on the toolbar to see a full-screen layout. The button changes to **Normal** - click this to return to the normal view with tabs.

To keep a recipe open without cluttering your screen, click the **Minimize** button in the upper right corner - the recipe will be reduced to a small box parked at the bottom of the main window.

To close a Recipe, click the **X** in the upper right corner, or select **Close Window** from the main **File** menu.

Click here to view topics in sequence: [First topic >>](#)

For a description of Recipe Commands, and each **Tab** on the Recipe form see:

[Recipe Commands](#)

[Base Oils](#)

[Lye / Water](#)

[Additives](#)

[Non-soap Recipes](#)

[Packaging](#)

[Fatty Acids](#)

[Options](#)

[Portions](#)

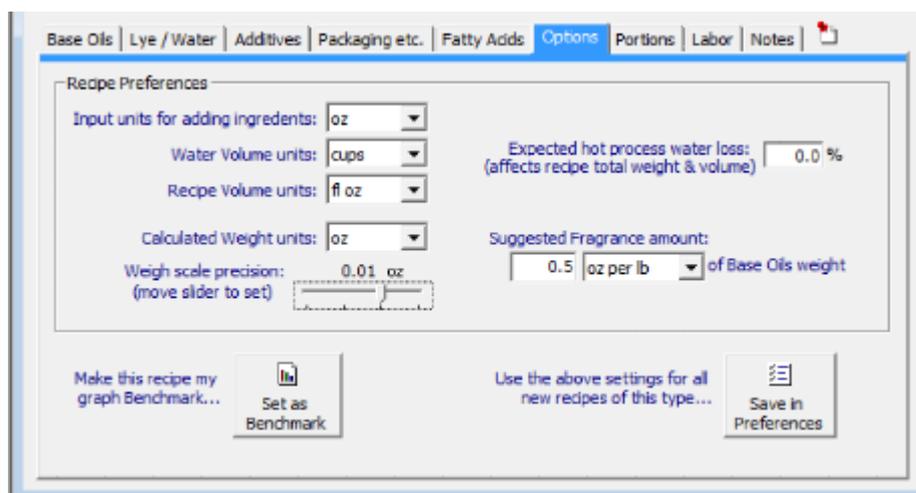
[Labor](#)

[Notes](#)

## Recipe Options

The **Options** page controls several aspects of your recipe form.

When you first open a new recipe, the options are set according to the [defaults](#) you have set in [MyPreferences](#).



Changes you make on the Options tab will be saved with the recipe. You can also save these option settings in MyPreferences by clicking the **Save in Preferences** button - they will then be your default settings for all new recipes of the same type.

### Recipe Option Settings

- Input Units** Sets the default units for entering ingredient amounts (e.g. oz or gr). Changing this will not affect any ingredients already entered into the recipe.
- Water Volume Units** The calculated water needed will be shown in these units (e.g. cups) as well as weight units.
- Recipe Volume Units** The recipe's approximate total volume is calculated in these units and displayed in the summary area.
- Calculated Weight Units** Set these units to match those used by your weigh scale. The weight of every ingredient is shown in these units.
- Scale Precision** Set this to match the number of decimal places displayed by your scale. Calculated weights will be rounded to this precision. Also, if you resize the recipe, all ingredient quantities will be rounded accordingly. (Note: This setting affects only the way numbers are **displayed**. Internally SoapMaker maintains numbers with much greater precision)
- Expected Water Loss** For hot process recipes, you can specify the percentage of water you expect to lose from evaporation while making the recipe. The total recipe weight and volume will be reduced accordingly (but not the calculated water amount needed to mix with lye).  
 Note: This loss amount should **not** include expected shrinkage during curing of solid soap. That is accounted for on the [Portions](#) page.
- Fragrance Amount** Set this to the desired rate per quantity of base oils. The [Fragrance Calculator](#) on the **Additives** tab will then suggest the appropriate amount.

## Set as Benchmark

For Soap recipes, if you would like this recipe to be the standard for comparing the [qualities](#) of all your recipe, you can make it the [benchmark](#) on the Qualities Graph by clicking the **Set as Benchmark** button.

### Related Topics:

[Creating a Recipe](#) - Introduction

[Soap Recipes](#)

[Non Soap Recipes](#)

[Recipe Portions](#)

[<< Previous topic](#)      [Next topic >>](#)

## Soap Recipes

SoapMaker supports 3 types of **soap recipes**:

- Sodium soap - bars made with Sodium Hydroxide lye (NaOH)
- Potassium soap - any soap using only Potassium Hydroxide (KOH)
- Combined lye soap - use this type for any soap made with a blend of both types of lye

The recipe form is similar for all 3 soap types. Clicking a **tab** on the form displays the selected page. (Click a tab name in this table for more information)...

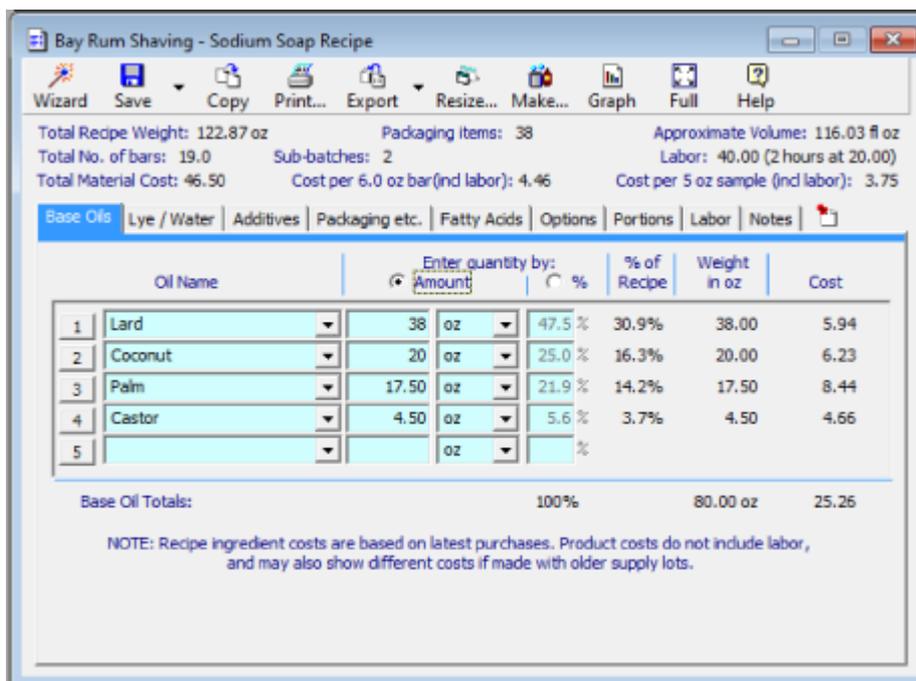
|                                |   |
|--------------------------------|---|
| <a href="#">Base Oils</a>      | The saponifiable fats and oils which form the base of your soap   |
| <a href="#">Lye / Water</a>    | The Lye and Water quantities are calculated automatically from the Base Oils you enter.   |
| <a href="#">Additives</a>      | All ingredients which are not saponified, such as scents and colors. You can also include water, or additional Base Oils in the Additives list.   |
| <a href="#">Packaging etc.</a> | Non-ingredient items included with your products, such as wrappers, labels, and bottles.  |
| <a href="#">Fatty Acids</a>    | If you are interested in chemistry, this tab lists the fatty acid composition resulting from the recipe's blend of Base Oils. The <a href="#">Predicted Qualities</a> shown on the graph are derived from these.                              |
| <a href="#">Options</a>        | This page enables you to select the units you prefer (e.g. ounces or grams), and other settings. You can set them for this recipe only, or save them as the default options for all new recipes of the same type.                             |
| <a href="#">Portions</a>       | Set various parameters for making the recipe, including the number of bars/portions and their sizes.  |
| <a href="#">Labor</a>          | If desired, enter your labor rate and the estimated hours needed to make this recipe. You can then see the labor cost per bar/portion in your <a href="#">Price List</a> to help you set prices that will give you the desired profit margin. |
| <a href="#">Notes</a>          | Here you can record any notes about this recipe. When you open an exiting recipe which contains notes, a little icon appears next to the Notes tab.      |

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## Base Oil Ingredients

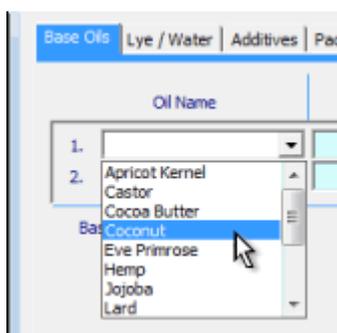
The **Base Oils** page is where you enter all the saponifiable fats and oils which form the base of your soap recipe.

(For non-soap recipes, see [Non-Soap Recipe Ingredients](#).)



### Entering Oil Names and Quantities

You can choose to enter oil quantities by **Amount** or by **Percent**. If you choose the latter, you will be asked to enter the desired total weight of oils at the bottom of the list.



To enter an oil, select it from the drop-down list, or just start typing the name and SoapMaker will autofill with the best match from the list.

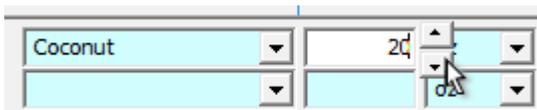
If you want to use an oil which is not listed, select the **+More Oils...** item at the bottom of the list - this will open the [Favorite Oils](#) window where you can select any of the more than 80 standard oils included with SoapMaker.

You can also add your own custom oils in [MySupplies](#), then use them in recipes.

After entering a Base Oil name, press your keyboard Tab key to move to the **quantity** field and enter the amount or percent. Press Tab again to move to the next row. SoapMaker adds more rows as you need them. If the number of rows exceeds the space available, the list will scroll to ensure the row you are working on is visible.

If you have chosen the **Enter by Amount** option, type the amount. The units are preset with your chosen default units (e.g. oz or gr), but you can change them for a particular entry by selecting different units from the drop-down list, or by typing the units name. This oil's percentage of the total oils is calculated.

If you have chosen the **Enter by Percent** option, then enter the desired **percentage** of the total oils weight. The amount is calculated. The total percent at the bottom will be colored if not 100% like this: **99%** or **101%**, so you can see at a glance whether your total is correct.

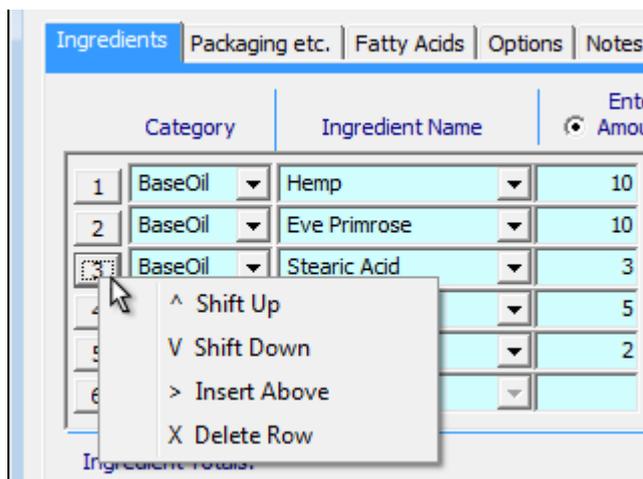


When editing the quantity of an ingredient, a pair of small arrows will appear for fine tuning.

Click an arrow to increase or decrease the amount by 1. If you click and hold, the amount will continue to change - release when you reach the desired number. This is a handy feature when the graph is visible - you can watch the different [Quality numbers](#) adjust as a particular oil's quantity changes.

### Editing a row

When editing an existing recipe, you can insert or delete a row, or shift a row up or down. Click on the row number and choose the desired operation from the pop-up menu.



### Calculated Values

As you enter ingredients, SoapMaker calculates the **weight** of each (converting from whatever units you entered), the **percentage** of the total recipe weight, and the **cost** (based on your latest purchase as recorded in [MySupplies](#)).

At the bottom of the page, the total weight and cost of oils are shown.

### Using Citric Acid

If you use Citric Acid in your recipes, you can define it as a 'base oil' so lye calculation will adjust for it. See [Using Citric Acid in soap recipes](#) for more information.

[<< Previous topic](#)      [Next topic >>](#)

### Predicting Soap Qualities

For each soap recipe, SoapMaker calculates the **predicted qualities** from the properties of the [base oils](#) which make up the recipe:

- **Hardness** – the harder the bar the longer it will last
- **Fluffiness** of lather – the ability to form lots of large bubbles
- **Stability** of lather – the ability to maintain a long lasting creamy lather
- **Moisturizing** (Conditioning) – the degree to which the soap will prevent irritation and dryness, and leave skin feeling soft

Each quality is rated on a scale of 0 to 10, and displayed on the **Predicted Soap Qualities Graph** for each open recipe. The graph enables you to evaluate different oil blends, and to compare different recipes. You can display up to 8 recipes (plus your benchmark) at once.



### The Quality Numbers

The predicted qualities are **relative** numbers, on a scale of 0 to 10, calculated from the proportions and

properties of the different **base oils** in a recipe. These numbers are intended only for comparing different oil blends, and do not reflect [additive](#) ingredients or the degree of lye or water discounting, although these factors may affect the actual quality of your soap.

Do not expect a good bar to have high numbers in every quality – the various qualities need to be balanced for a good recipe, and no soap could possibly have high numbers for all, because some of the qualities are mutually exclusive. For example, oils which produce a hard soap have poor moisturizing, while good moisturizing oils tend to make the soap soft.

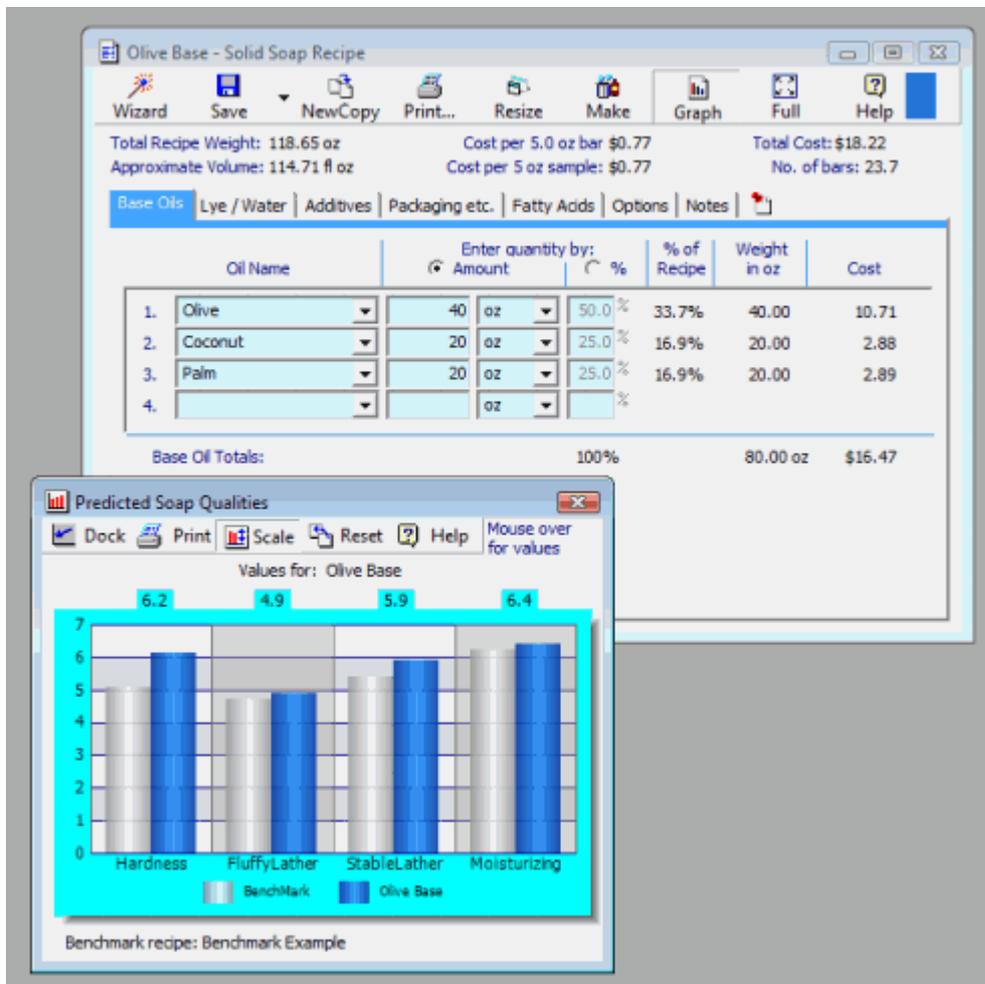
## Using the Graph

To open the Graph, or bring it to the front if it's already open, click the **Graph** button on the main toolbar.

You can also open the Graph by:

- selecting **Show Qualities Graph** from the main **Recipes** menu.
- clicking the toolbar **Graph** button on a [Recipe form](#). This either **adds** the recipe to the graph (if it's not already plotted) and brings the graph to the front, or **removes** the recipe from the graph if already plotted.

When a recipe is showing on the graph, a colored bar appears at the right end of the Recipe's toolbar to match its color on the graph (blue in this example)...



When a Recipe form is the front-most window, the recipe's quality numbers are displayed at the top of the graph. When the graph is the front-most window, the [Benchmark](#) numbers are displayed. Hover the mouse cursor over one of the colored bars to see the numbers displayed for the associated recipe.

You can move the Graph window by dragging the top. You can resize it by dragging a corner or edge. SoapMaker will remember the size and location the next time you open it.

To set a different recipe to be your benchmark, open the recipe and either select **Set as Benchmark** under the main **Recipes** menu, or click the **Set as Benchmark** button on the Recipe form **Options** tab.

The Graph window **Toolbar** provides buttons for these commands:

- Dock:** Moves the graph window to the lower left corner of the main window. Use this to help reduce clutter when you have several windows open at once. If [MyRecipes](#) is also open, it will dock in the upper right corner above the graph.
- Help:** Opens this Help topic
- Print:** Creates a full-page printout of the graph
- Scale:** Turns auto-scaling on or off. Without auto-scale, the graph always shows the full range of values up to 10.
- Reset:** Resets the benchmark values to those originally provided with SoapMaker. The benchmark recipe name will be shown as "Benchmark Example".

To close the Graph when you are not using it, click the **X** in the upper right corner, or select **Hide Qualities Graph** from the main **Recipes** menu.

## Oil Properties

Each base oil's soap-making properties arise from its unique composition of different fatty acids. The quality numbers are derived from each fatty acid's molecular weight, carbon chain length and number of unsaturated double bonds, as well as the oil's iodine value and [SAP value](#).

You can see all the properties of a particular oil by selecting it in *MySupplies* and clicking the [Properties](#) button. To view the qualities of all the base oils at once, use the [Compare Oil Qualities](#) tool.

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## Related Topic

[Oil Properties](#)

## Lye and Water Ingredients

The **Lye/Water** page shows the calculated amounts of lye and water. You can adjust these suggested amounts.

## Lye

The type of lye used depends on the recipe type:

- Sodium soap - Uses only Sodium Hydroxide (NaOH) as shown in this example. Typically used for solid soap bars
- Potassium soap - For any soap recipe which uses only Potassium Hydroxide (KOH). Typically used for liquid soap
- Combined lye soap - For any recipe which uses both NaOH and KOH lye. Typically used for liquid or cream soap

SoapMaker calculates the amount of lye needed to saponify the recipe's base oils, using [SAP values](#) determined by industry research.

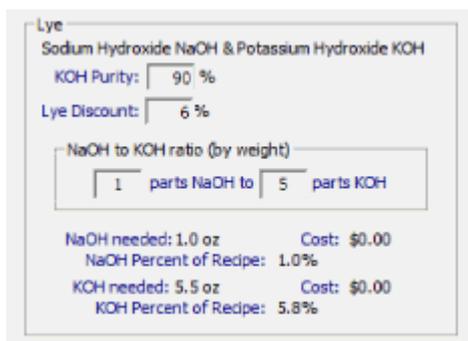
Because the actual SAP value for a particular oil may vary slightly depending on the source and refining process, it is wise to reduce or **discount** the amount of lye slightly to ensure there will be no unsaponified lye remaining in the finished soap.

To make a more luxurious soap which is kind to the skin, you can superfat your recipe, either by increasing the lye discount, or by including additives with fat content such as milk.

### Lye Discount

For solid soap recipes, a lye discount of at least 4% is recommended.

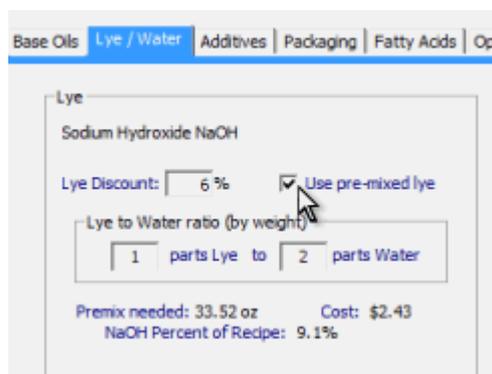
For liquid or cream soaps, you may enter a discount of 0%, or even a negative discount (e.g. -10%) which will leave excess lye in the soap base. In this case it is essential that your recipe include a **neutralizing agent** in the [additives](#) list, and that you test the PH of your soap to ensure the finished product does not still contain lye.



For both liquid and cream soaps, you can specify the **purity level** for your potassium hydroxide (KOH). You can specify the default level for new recipes in MyPreferences. KOH is typically around 90% pure, but if this is not indicated on the container, you should check with your supplier.

For combined lye soap recipes, both types of lye are used. You determine their ratio by weight by entering the relative values as shown in this example.

### Using Pre-Mixed Lye



For sodium and potassium soap recipes, you have the option to use a pre-mixed lye solution. When you select this option, the **Lye to Water ratio** section appears. The default ratio is set based on your preferences, but you can enter different values in this recipe.

(The pre-mixed lye solution option is not available for combined lye soaps)

When you use the pre-mixed lye option, the calculated water amount shows only the **extra** water needed if any. The Lye **cost** is based on the cost of both lye and water portions of the pre-mixed solution.

For a discussion of how the use of pre-mixed lye affects your supplies inventory, see [Pre-Mixed Lye](#).

### Water

The suggested **water needed** amount is calculated from the undiscounted lye amount. The ratio varies according to the recipe type. If you have chosen the pre-mixed lye option, only the **extra water** needed is shown. For an explanation of how the water needed is calculated, see the topic [Water Calculation in Recipes](#).

For your convenience in measuring, the **water needed** amount is given in both weight units and volume units. You can set your preferred units on the recipe's [Options](#) tab.

### Other Liquids instead of Water

Any liquids other than water must be entered in the **Additives** section of the recipe. If you include liquid additives, such as [milk](#), which will replace some of the recommended water, you can have SoapMaker reduce the calculated water amount to compensate. Simply click in the check box under the heading

**Adjust Water** for each of those additives. (See [Additive Ingredients/Adjust Water](#) for more information.) If you set the additive quantity larger than the total suggested water amount (at the current **water discount** setting), SoapMaker will display a negative **water needed** quantity. This does not affect the total recipe weight - it just provides you with an indication that the additives you are using instead of water are more than the suggested water quantity, so no additional water is needed.

### Adjusting Water Amount

You can adjust the water amount to be more or less than the suggested amount by choosing the desired method to specify it, and entering a value:

**Discount** - You can decrease the water amount by specifying a discount percentage – for solid soap, this will make a stiffer batch which traces faster and takes less time to dry. You can also increase the water amount by specifying a negative discount percentage.

**Lye Solution Strength** - You can enter the exact solution strength desired, where:

$$\text{Lye Solution Strength} = \frac{100 \times \text{Lye weight}}{\text{Lye weight} + \text{Water weight}}$$

(the weight of water includes any additives with the **Adjust Water** option checked, as well as the water portion of pre-mixed lye if used.)

**Water/Lye Ratio** - This is just the desired amount of water divided by the amount of lye. If you use 2 lbs of water to 1 lb of lye, the ratio is 2.

### Expected Water Loss

At the bottom of the Water section, is the amount of water expected to be lost due to evaporation during manufacture of your product. The default value is set in [MyPreferences](#), and you can change it on this recipe's [Options](#) tab.

For cold process soap, this would normally be set to zero. For hot process recipe types, you may want to enter a number based on your process.

The water loss percentage does **not** affect the **water needed** amount - it only affects the **total** recipe weight and volume calculations.

### Distilled Water or Tap Water?

If you use both **distilled water** and **tap water** in soapmaking, make sure you enter recipes to match the way you have set the **Water** item in the [Lye/Water list](#) of MySupplies according to this table:

| If this recipe uses: | And MySupplies "Water" item is: | Then do This:  |
|----------------------|---------------------------------|--|
| Tap water            | Tap water                       | No action needed   |
| Tap water            | Distilled water                 | Enter a <b>Tap Water</b> additive and check the <b>Adjust Water</b> box.       |
| Distilled water      | Tap water                       | Enter a <b>Distilled Water</b> additive and check the <b>Adjust Water</b> box. |
| Distilled water      | Distilled water                 | No action needed   |

For more information, see the topic [Distilled vs. Tap Water...](#)

### Costs

The costs of the calculated lye and water quantities are shown, and are included in the recipe total cost. If you use the pre-mixed lye option, the pre-mix cost includes both lye and water cost (if any).

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### Additive Ingredients

The **Additives** page is where you enter ingredients which are not saponified, such as scents and colors.

You can also include water, or additional Base Oils in the Additives list. Before you can use an additive ingredient in recipes, it must be defined in your supplies stock (See [Defining new Additives...](#))

(For non-soap recipes, see [Non-Soap Recipe Ingredients.](#))

| Adjust water             | Category | Additive Name | Amount  | % of Recipe | Weight in oz | Cost   |
|--------------------------|----------|---------------|---------|-------------|--------------|--------|
| <input type="checkbox"/> | FO       | Bay Rum FO    | 2.50 oz | 2.0%        | 2.50         | 0.00   |
| <input type="checkbox"/> | Misc     | French Clay   | 1.50 oz | 1.2%        | 1.50         | 0.00   |
| <input type="checkbox"/> |          |               |         |             |              |        |
| Additive totals:         |          |               |         |             | 4.00 oz      | \$0.00 |

Suggested Fragrance amount: 2.50 oz  
based on current Oils weight of: 80.00 oz

## Categories

Additive ingredients are organized into **Categories** for ease of entering them into recipes. Before you can enter an Additive name, you first enter the Category, either by selecting it from the drop-down list, or by just typing the name.

You can also choose the **BaseOil** "category" to enter base oils in the Additives list. (They will not be included in the lye calculation.) This is an alternate way to superfat your recipe, rather than discounting the lye amount.

In Liquid or Cream soap recipes, you can also include extra **Water** in the Additives list.

After selecting or typing the **Category**, press the Tab key to move to the **Additive Name** field.

## Entering Additive Names and Quantities

Select an Additive name from the drop-down list of all Additives in the selected Category, or just start typing the name and SoapMaker will autofill with the best match from the list. (Additives must be defined in [MySupplies](#) before you can use them in recipes.)

After entering an Additive name, press the Tab key to move to the **Amount** field and enter the amount. Press Tab to enter or select different **units** if desired.

Press Tab again to move to the next row. SoapMaker adds more rows as you need them. If the number of rows exceeds the space available, the list will scroll to ensure the row you are working on is visible.

## Adjust Water Option

When you include a liquid additive (e.g. if you use [milk](#) in recipes), you can have SoapMaker reduce the calculated water amount accordingly by checking the **Adjust Water** box at the left of the row.

When you check the box, if you have not yet entered a quantity, and if there is no other **Adjust Water** box checked, the quantity will be automatically filled with the total **calculated water** amount. If you do not want to replace **all** the water with this ingredient, you can then edit the quantity.

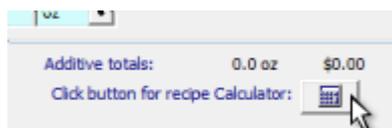
Note: If you have the **Adjust Water** box checked, and set the additive quantity larger than the total suggested water amount (at the current water discount setting), SoapMaker will display a negative **water needed** quantity on the Lye/Water page. This does not affect the total recipe weight - it just provides you with an indication that the additive you are using instead of water is more than the suggested water quantity, and that no additional water is needed.

For more information about using milk in recipes, see the topic [Milk in Soap Recipes...](#)

## Fragrance Calculator

To assist in entering fragrances, SoapMaker suggests a fragrance amount based on the current total Base Oils weight, and the **Fragrance rate** set on the recipe's [Options](#) tab.

## Recipe Calculator



For **Liquid** and **Cream** soap recipes, a Calculator button will open a handy calculator window to aid in determining the correct amounts of process-specific additives.

For more information see:

[Liquid Soap Calculator](#)

[Cream Soap Calculator](#)

## Calculated Values

As you enter ingredients, SoapMaker calculates the **weight** of each (converting from whatever units you entered), the **percentage** of the total recipe weight, and the **cost** (based on your latest purchase as recorded in [MySupplies](#)).

At the bottom of the page, the total weight and cost of Additives are shown.

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## Milk in Soap Recipes

### Using Milk or other liquids instead of water in Soap Recipes

Because milk has a low fat content, it is best to enter it in recipes as an **Additive** rather than a Base Oil.

For example, whole goats milk contains only about 4% fat, so even if you replace all the water in a recipe with goats milk, it will have a very small effect on the amount of lye. If you made a tallow recipe and replaced **all the water** with goats milk, it would require only about 1.6% more lye to saponify the fats in the milk. The goats milk can be used for [superfating](#), or you can reduce the lye discount by one or two percent to allow for the fat content of the milk.

When you include milk or another water replacement liquid as an Additive, you can have SoapMaker reduce the calculated water amount accordingly by checking the **Adjust Water** box as shown in this example:

| Adjust water                        | Category | Additive Name | Amount | % of Recipe | Weight in oz | Cost |
|-------------------------------------|----------|---------------|--------|-------------|--------------|------|
| <input checked="" type="checkbox"/> | Misc     | Goats Milk    | 20 oz  | 14.1%       | 20.00        | 0.00 |
| <input type="checkbox"/>            |          |               | oz     |             |              |      |

When you check the **Adjust Water** box, if you have not yet entered a quantity, and if there is no other **Adjust Water** box checked, the quantity will be automatically filled with the total **calculated water** amount. If you do not want to replace **all** the water with this ingredient, you can then edit its quantity.

Note: If you have the **Adjust Water** box checked, and set the additive quantity larger than the total suggested water amount (at the current water discount setting), SoapMaker will display a **water needed** quantity of zero on the Lye/Water page, together with a negative **calculated value** as an indication that the additive you are using instead of water is more than the suggested water quantity. You can still make the recipe this way if desired - the water amount is not critical, it's more a matter of personal preference.

## Related Topics

[Lye and Water Ingredients](#)

[Additive Ingredients](#)

## Non Soap Recipes

The Non-Soap recipe form has fewer TABS than the Soap recipe form (Click a tab name in this table for more information)...

**Ingredients** Covered on this page: Recipe ingredients can include Base Oils, Additives or water.

**Packaging etc.** Non-ingredient items included with your products, such as wrappers, labels, and bottles.

Non soap recipes can contain **only** packaging items if desired.

**Fatty Acids** If you are interested in chemistry, this tab lists the fatty acid composition resulting from any Base Oils in the Ingredients list.

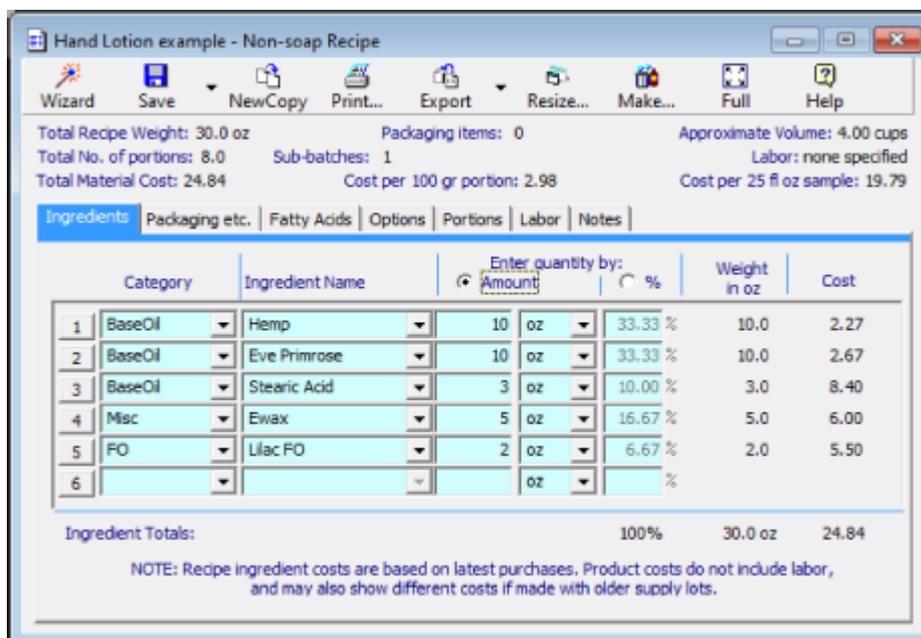
**Options** This page enables you to select the units you prefer (e.g. ounces or grams), and other settings. You can set them for this recipe only, or save them as the default options for all new non-soap recipes.

**Portions** Set various parameters for making the recipe, including the number of portions and their sizes.

**Labor** If desired, enter your labor rate and the estimated hours needed to make this recipe. You can then see the labor cost per bar/portion in your [Price List](#) to help you set prices that will give you the desired profit margin.

**Notes** Here you can record any notes about this recipe. When you open an exiting recipe which contains notes, a little icon appears next to the Notes tab. 

All ingredients of a Non-Soap recipe are entered on the **Ingredients** tab. You can include Base Oils, Water, or Additives.



## Categories

Additive ingredients are organized into **Categories** for ease of entering them into recipes. Before you can enter an Additive name, you first enter the **Category**, either by selecting it from the drop-down list, or by just typing the name.

You can also choose the **BaseOil** or **Water** "categories" to enter base oils or water in the ingredients list.

After selecting or typing the **Category**, press the Tab key to move to the **Ingredient Name** field.

## Entering Ingredient Names and Quantities

You can choose to enter ingredient quantities by **Amount** or by **Percent**. If the choose the latter, you will be asked to enter the desired total weight at the bottom of the list.

Select a name from the drop-down list of all ingredients in the selected **Category**, or just start typing the name and SoapMaker will autofill with the best match from the list. (Note: If you select the **Water** category, the name "Water" is filled in for you, since it is the only option.)

After entering an ingredeint name, press the Tab key to move to the **quantity** field and enter the amount or percent. Press Tab again to move to the next row. SoapMaker adds more rows as you need them. If

the number of rows exceeds the space available, the list will scroll to ensure the row you are working on is visible.

If you have chosen the **Enter by Amount** option, type the amount. The units are preset with your chosen default units (e.g. oz or gr), but you can change them for a particular entry by selecting different units from the drop-down list, or by typing the units name. This ingredient's percentage of the total ingredients is calculated.

If you have chosen the **Enter by Percent** option, then enter the desired **percentage** of the total ingredients weight. The amount is calculated. The total percent at the bottom will be colored if not 100% like this: **99%** or **101%** , so you can see at a glance whether your total is correct.

### Editing a row

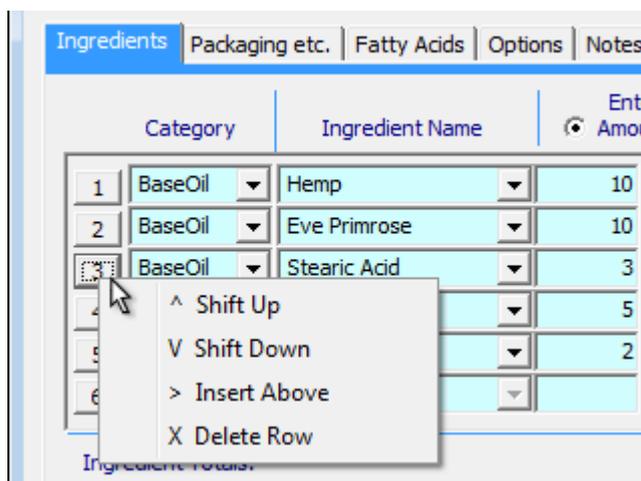
When editing an existing recipe, you can insert or delete a row, or shift a row up or down. Click on the row number and choose the desired operation from the pop-up menu.

### Calculated Values

As you enter ingredients, SoapMaker calculates the **weight** of each (converting from whatever units you entered), the **percentage** of the total recipe weight, and the **cost** (based on your latest purchase as recorded in [MySupplies](#)).

At the bottom of the page, the total weight and cost of ingredients are shown.

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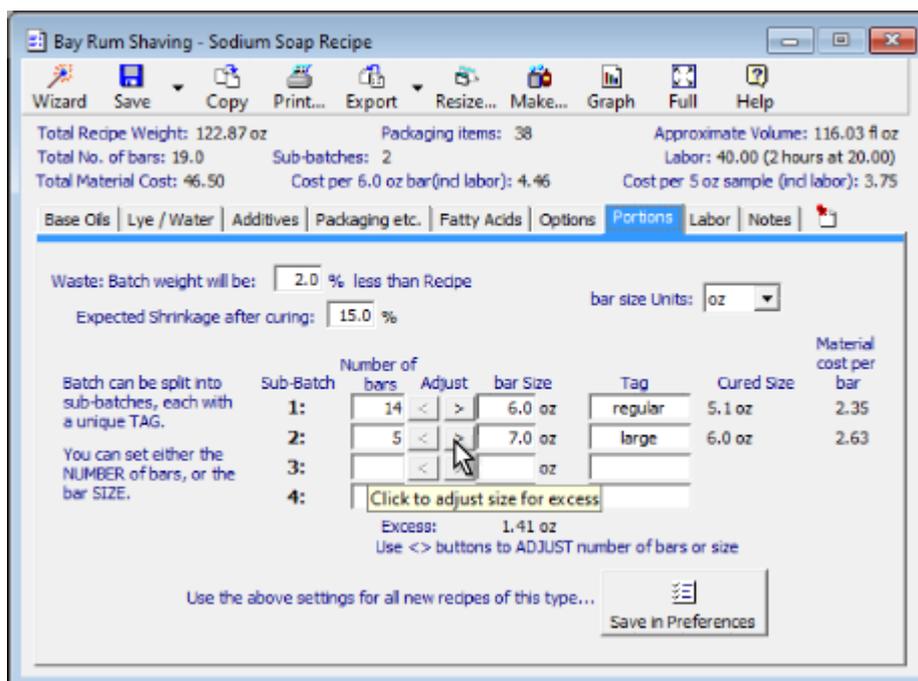


### Recipe Portions

The **Portions** page is where you specify the number of bars/portions and their size. If desired, you can split the recipe into as many as 4 'sub-batches' with different sized bars/portions. When you start a new recipe, the values on this page are filled in with the default values set in your [preferences](#), but you can change them here before saving the recipe. If your preferences specify only a single sub-batch with only a default size, or only a default number of bars/portions, the other value will be automatically calculated.

Select the **units** you want to measure your bar/portion size, and enter the expected **waste** and shrinkage **values**.

The **waste** allowance is intended to cover any amount that is likely to be spilled or stuck to the pot when you make a batch, while the **shrinkage** factor is the expected loss in weight while the soap cures.



If you plan to split a batch into **sub-batches** of different sized products, and your recipe includes **packaging items**, it is important to specify the sub-batches here, and to set your packaging item **quantity rates** to match (see [Packaging Items](#)).

For each sub-batch you plan to make, enter the **number** of bars/portions and the initial **size**. The **cured size** will be calculated for you taking into account the shrinkage factor. If you are not splitting into sub-batches, just fill in the parameters for sub-batch 1.

Any **excess** after specifying quantities and sizes is shown at the bottom - this is affected by the **waste** factor. You can adjust the portions or the waste factor to minimize the excess, or click an **Adjust** button as shown above to have the entire excess amount applied to the bar/portion quantity or size for that sub-batch. A button labeled **<** will adjust the **number** of bars/portions, while a button labeled **>** will adjust the **size**.

Each sub-batch in the recipe must have a unique **Tag** related to its size or shape. **Pro** Sub-batch Tags can be included in customer [invoices](#), and are saved in your [Price List](#), so choose something that will be meaningful to your customers.

Regardless of how many sub-batches you specify, the recipe header shows the cost and size for the **first** sub-batch for easy reference. The **Cost per sample** is calculated as if the entire recipe was made with only a single sub-batch using the sample size and the packaging items from the first sub-batch.

If you have made changes on this page and want them to be the default values for all new recipes of this type, click the **Save in Preferences** button.

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### Related Topics:

[Recipe Options](#) - Setting your preferred units, and other parameters

[Soap Recipes](#) - Entering ingredients for soap recipes

[Non Soap Recipes](#) - Creating recipes for products other than soap, or for M&P soap.

### Packaging Items

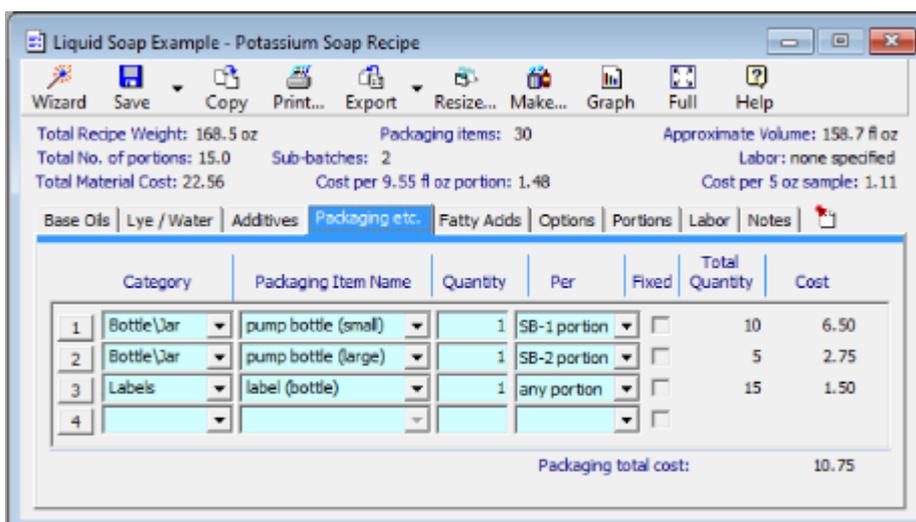
The **Packaging etc.** tab is where you enter any non ingredient items included with your products, such as wrappers, labels, and bottles, or any items which don't contribute to the batch weight.

Including these items in your recipes will make your recipe costs more accurate, and will enable you to track your packaging inventory.

Before using packaging items in your recipes, they must be defined in your supplies stock (See [Defining](#)

[new Packaging items...](#)).

If you want to make a recipe that contains **only** packaging items, use the [non-soap recipe](#) type.



### Categories

Packaging items are organized into **Categories** for ease of entering them into recipes. Before you can enter a Packaging item's name, you first enter the Category, either by selecting it from the drop-down list, or by just typing the name.

After selecting or typing the **Category**, press the Tab key to move to the **Packaging Item Name** field.

### Entering Packaging Item Names and Quantities

Select a Packaging Item Name from the drop-down list, or just start typing the name and SoapMaker will autofill with the best match from the list. (Packaging items must be defined in [MySupplies](#) before they can be used in recipes.)

After entering a name, press the Tab key to move to the **Quantity** field and enter the desired quantity. Press Tab to move to the **Per** field and select one of the possible rates as shown in the table below. If you will not be splitting the batch into sub-batches of different sized products, just set each item to quantity per **any bar/portion**. But if you will be splitting the batch, it is important to specify which sub-batch each packaging item is associated with as explained in the table below.

Press Tab again to move to the next row. SoapMaker adds more rows as you need them. If the number of rows exceeds the space available, the list will scroll to ensure the row you are working on is visible. You can stretch the window taller by dragging the lower edge.

#### Quantity Rates:

Each packaging item entered must be assigned the rate for its quantity under the **Per** heading:

|   |   |
|---|---|
| Quantity is per <b>SB-n bar/portion</b><br>(where n = 1 to 4) | The entered quantity is multiplied by the number of bars/portions for sub-batch <b>n</b> as specified on the <a href="#">Portions</a> page.   |
| Quantity is per <b>Any bar/portion</b>                        | The entered quantity is multiplied by the total number of bars/portions in all sub-batches.   |
| Quantity is <b>Total</b>                                      | The quantity as entered is included in the recipe. If you use the <a href="#">Resize Recipe</a> command later, the quantity will be increased/decreased proportionally unless you check the <b>Fixed</b> box. |

In the example liquid soap recipe shown above, there are two sub-batches with 10 portions for the smaller size, and 5 portions for the larger. Each sub-batch has bottle sizes to match. The bottle labels are the same for both sizes.

### Calculated Values

As you enter items, SoapMaker calculates the total **quantity** of each, and the **cost** (based on your latest purchase as recorded in [MySupplies](#)).

At the bottom of the page, the total cost of all packaging items is shown.

The recipe header shows the **Cost per Sample** using the sample size set in your [Preferences](#). This is saved with the recipe, and provides a means of comparing different recipe costs in the list shown in [MyRecipes](#). If your recipe has packaging items and multiple sub-batches, the sample cost is calculated as if the entire recipe was made with that single sample size using the packaging specified for the first sub-batch.

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## Recipe Fatty Acids

The **Fatty Acids** tab shows the composition resulting from all the Base Oils in your recipe. These percentages contribute to the predicted **Qualities** shown on the right, and displayed on the [Graph](#).

| Saturated       |        | Unsaturated         |        | Relative Qualities (Scale of 10) |     |
|-----------------|--------|---------------------|--------|----------------------------------|-----|
| Caprylic (C8):  | 1.8 %  | Oleic (C18:1):      | 30.6 % | Hardness:                        | 6.6 |
| Capric (C10):   | 1.5 %  | Linoleic (C18:2):   | 7.5 %  | Fluffy lather:                   | 4.9 |
| Lauric (C12):   | 12.2 % | Linolenic (C18:3):  | 0.0 %  | Stable lather:                   | 5.6 |
| Myristic (C14): | 5.3 %  | Ricinoleic (C18:4): | 4.9 %  | Moisturizing:                    | 5.5 |
| Palmitic (C16): | 23.3 % |                     |        |                                  |     |
| Stearic (C18):  | 8.5 %  |                     |        |                                  |     |

For Soap Recipes, the fatty acid composition reflects only Base Oils included on the **Base Oils** tab. If you have also included Base Oils in the **Additives** list, they are not considered. Note that for liquid or cream soap recipes, the **Hardness** quality is zero.

For Non-Soap recipes, the fatty acid composition reflects only **Base Oils** in the Ingredients list - other ingredients are not considered.

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## Labor

The **Labor** tab provides the ability to record the estimated hours needed to make this recipe, and your hourly rate. Then products you make with this recipe will show the **labor cost** per bar/portion in your [Price List](#) to help you set your prices to give you the desired profit margin.

The labor cost is included in the Cost per bar/portion shown in the recipe heading, and in the Cost per sample. The labor cost per bar/portion assumes each portion requires the same amount of labor, regardless of portion size.

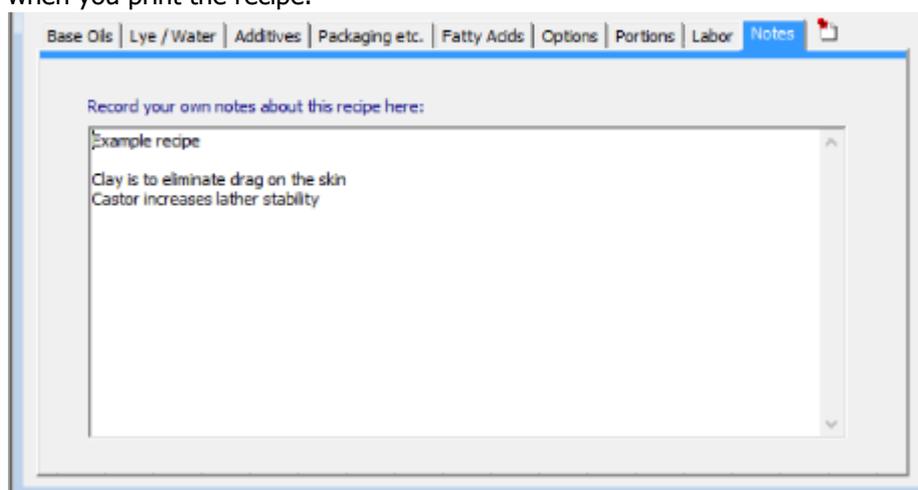
NOTE: Labor cost is **not** included in the material cost, and is not included in product costs shown in MyProducts as this would not be valid for tax purposes.

You can set default values for hours and labor rate in [MyPreferences](#) so they will be filled in automatically for new recipes.

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## Recipe Notes

The **Notes** tab enables you to record any special instructions or other notes about this recipe. These can be included when you print the recipe.



If a recipe contains notes, a little icon like this  appears next to the Notes tab.

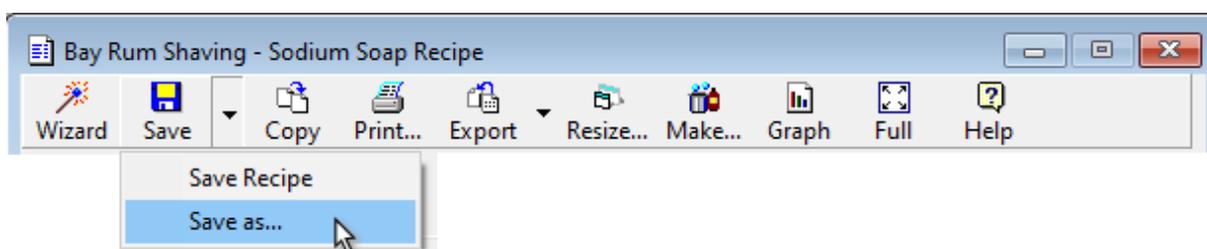
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## Recipe Commands

At the top of every Recipe form is a **toolbar**. Hover your mouse cursor over any button to see a pop-up description of what the button does.

Some buttons include a drop-down menu as shown in this example. (Some of these commands can also be accessed from the main **Recipes** menu.)

## Recipe Toolbar



The following commands are available from the Recipe toolbar:

- Export** Save recipe contents as text file, or save ingredient list for making labels.
- Full** Expand to a full-screen layout to view all ingredients at once. The button changes to **Normal** - click it to restore the normal view with tabs.
- Graph** Add this recipe to the graph, or remove it from the graph.
- Help** Opens the appropriate Help page.
- Make Pro** [Make a Batch](#) with this recipe.

- Copy** Open a copy of this recipe. Use this if you want to create a new recipe based on an existing one.
- Print** Print the recipe.
- Resize** [Resize](#) this recipe (will open a copy and resize the copy without changing the current recipe).
- Save** Save this recipe. If this is a new untitled recipe, you will be asked to give it a name and choose the group in which to save it. The drop-down list next to the Save button provides a **Save As** option so you can save a copy with a different name.
- Wizard** Provides step by step guidance with filling a recipe form to create a recipe.

## Main Menu Commands

**Recipe Menu:** **Update Recipes** - Update all recipes to reflect latest supply costs.

**Open a Copy**

**Resize Recipe**

**Add to Graph** or **Remove from Graph**

**Set as Benchmark** - Make this recipe the graph benchmark.

**Pro Make a Batch**

**File Menu:** **Save Recipe**, or **Save As...** - Save the current recipe, or Save as a new recipe with a different name

**Export Ingredient List** - Create a text file containing the list of recipe ingredients and their [INCI names](#) which can be edited to make product labels.

**Print Recipe**

**Export Recipe...** - Create a text file with the contents of the currently open recipe to [exchange](#) with other SoapMaker 3 owners.

**Import Recipe...** - Import a previously exported recipe text file. A new untitled recipe is created with the imported contents.

## Keyboard Shortcuts

**Ctrl-G** Add to Graph or remove from Graph

**Pro Ctrl-M** Make a Batch

**Ctrl-P** Print Recipe

**Ctrl-S** Save Recipe

**Ctrl-T** Move to the next Tab (page)

**Tab** Move to the next field

**Shift-Tab** Move to the previous field

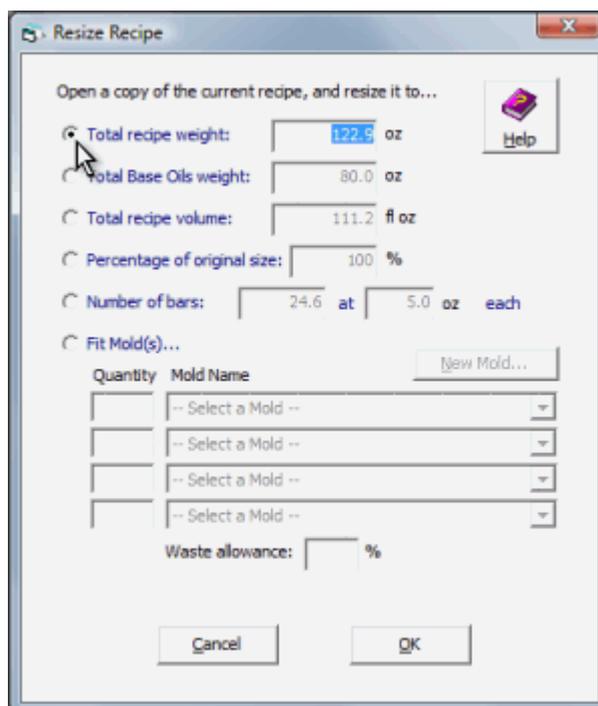
**Enter** Move down to the next row

**Shift-Enter** Move up to the previous row

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## Resizing a Recipe

To Resize a recipe, click the **Resize** button on the Recipe form toolbar, or choose **Resize Recipe** from the main Recipe menu. The Resize Recipe [dialog](#) window will open:



When you resize a recipe, SoapMaker will open a copy and resize the copy. The original recipe will not be changed.

You can specify the new recipe size in several ways:

- Total weight
- Total Base Oils weight
- Total volume
- Percentage of original size
- Number of bars/portions of a specified size (see note below)
- To fit one or more molds

After selecting an option and entering the desired size, click **OK**. A copy of the recipe will be opened, resized as specified.

#### Notes:

1. The weight and volume units depend on the original recipe's [Options](#) settings for **Calculated Weight Units**, and **Recipe Volume units**. Also, if the recipe's Calculated Weight units are set to **lb~oz**, the resize dialog will use **oz**. If you want to resize in lbs, first set the recipe's Calculated Weight units to lbs.
2. If your recipe has more than one sub-batch defined, resizing to a specified number of bars/portions will give unexpected results.

### The Fit Molds option

If you choose the **Fit Molds** option, you can select up to 4 different molds from the drop-down lists, and any quantity of each mold.

If a desired mold is not yet in the list, you can define it now by clicking the **New Mold** button. This will open the [New Mold](#) dialog where you can enter the dimensions or volume of your mold.

The **Waste allowance** defaults to the setting in [MyPreferences](#) for this recipe type, but you can change it here. This value is intended to allow for residue that remains in the pot after pouring into molds. For example, if the Waste Allowance is 2%, the new size of the recipe will be 2% **more** than the mold volume.

**Note:** if your soap contains entrapped air as a result of the mixing process, the soap volume may be larger than that calculated by SoapMaker, causing it to overflow the mold. If you experience this, try entering a **negative** "waste allowance" which will result in a smaller resized recipe.

When you resize to fit molds, or to a specified recipe volume, the accuracy of the volume calculation depends on correct [specific gravity](#) numbers for all ingredients. If the recipe includes Additive ingredients for which you have not entered correct specific gravity in [MySupplies](#), the resized recipe's volume may differ slightly from the volume you requested.

## Related Topics

[MyMolds](#) - List of available molds

[New Mold](#) - Define new molds that can be used for resizing recipes

[Resized recipe too large or small](#) - Calibrate the resizing to fit molds

[Creating a Recipe](#) - Creating or modifying a recipe

[Scale Precision](#) - How SoapMaker stores and displays recipe quantities

## Sharing Recipes

### Sharing Recipes with other SoapMaker 3 Users

If you like to exchange recipes with friends or colleagues, you can easily do it by using the File menu **Export Recipe** and **Import Recipe** commands.

#### Exporting a recipe

To export a recipe, open the recipe and click the toolbar **Export/Recipe as Text File** button, or choose **Export Recipe...** under the File menu. This will create a text file containing all the recipe ingredients, as well as the Notes if any. You can then share the recipe by attaching the text file to an email, or by uploading it to the SoapMaker Users' Group **Files** area.

(Note: you can also export a sorted ingredient list which can be used to create labels).

#### Importing a recipe

To import a recipe, choose **Import Recipe...** under the File menu. You will be asked to select a text file which has been exported from SoapMaker 3. If the selected file is correctly formatted, a new untitled recipe will be created with the contents from the imported file. You can then set the recipe options the way you want them, and save the recipe with a meaningful name.

Note: if the imported recipe contains ingredients which have not been defined in MySupplies, they will be skipped and you will receive a warning message. In this case, create the missing ingredients in MySupplies and then import the recipe again.

If you edit the text file before importing, take care to avoid changing the format (e.g. by adding or removing a tab character) or the file may not import correctly.

#### See also:

[Export Ingredient List](#)

## Deleting Old Supply Items

If you have old supply items listed in [MySupplies](#) that you no longer use, you can safely **delete** them as long as you no longer have saved recipes that contain them and they no longer show any stock left. This will keep them from cluttering up your stocklist. Their individual purchase records will also be deleted, but the original **supply order** that includes their purchase will still be available in the [Supply Orders Report](#).

If you still have saved recipes using a supply item, you cannot delete the item unless you first delete the recipes. If you want to keep the recipes, then instead of deleting the supply item, uncheck the **Track Usage** box on the stocklist for that item, and set MySupplies to **Show Only Tracked Items**. Note: If the stocklist still shows stock remaining for the item, the Track Usage box is disabled, so you will have to first remove the old stock. You can do this in either of two ways:

1. If you want to keep a record, use the [Remove Stock](#) feature.
2. Or you can simply edit any purchase records and set the stock left value to zero as described in the topic [Correcting Supply Stock...](#)

## Making a Product Batch

### Pro Recording manufacture of your products

This is one of the key activities for managing your inventory with SoapMaker.

Each time you make a batch of products, use the **Make Batch** command with the appropriate recipe to record it. The new products are added to [MyProducts](#) stocklist, and the ingredients and packaging items specified in the recipe are deducted from [MySupplies](#) stocklist.

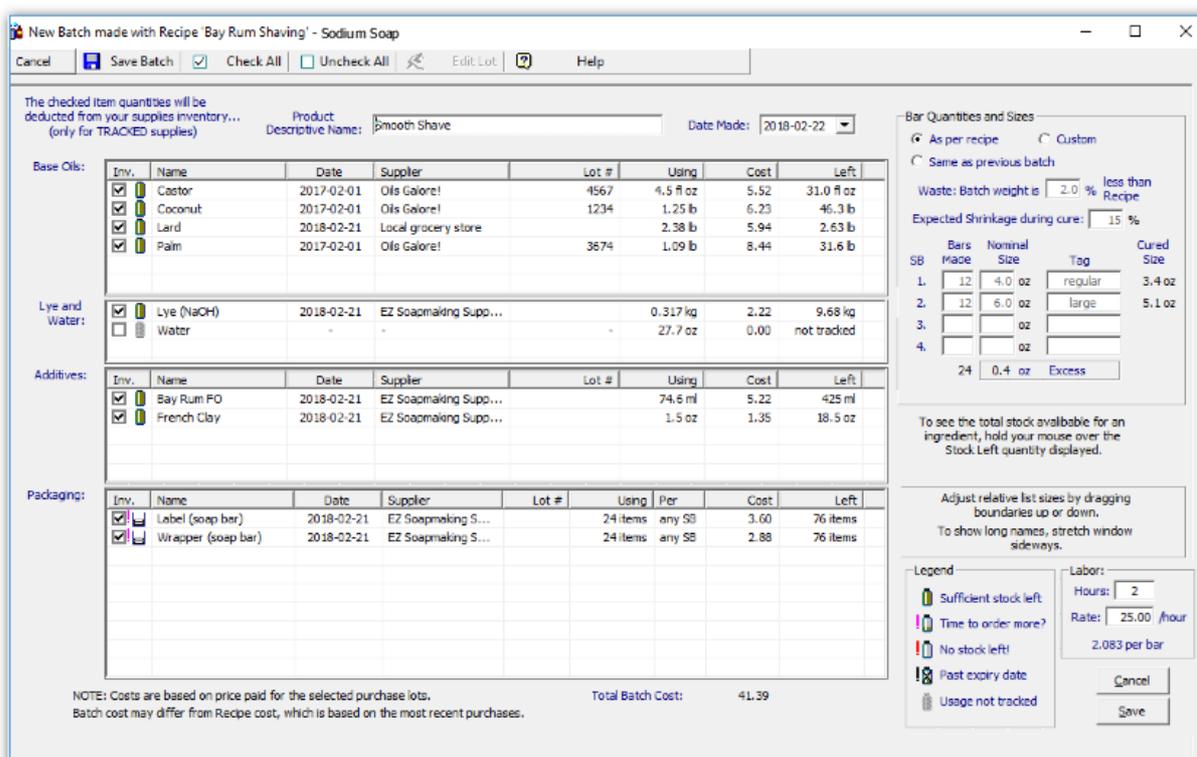
The cost of each product is calculated from the costs of the supply lots used.

### The Make Batch Command

To record a new product batch, do one of the following:

- From an open [Recipe Form](#), click the toolbar **Make** button, or choose **Make a Batch** from the main **Recipes** menu.
- In [MyRecipes](#), select a recipe and click the toolbar **Make** button, or right-click and choose **Make Batch** from the pop-up menu.
- In [MyProducts](#), select an existing batch and click the toolbar **Repeat** button, or right-click and choose **Make another Batch like this one** from the pop-up menu.

The **New Batch dialog** will open:



### Batch Parameters

**Product Descriptive Name** - this is the product name that will appear on your customer invoices. If this is the first batch made with this recipe, the Recipe Name will be shown, but you can change it to something that will be more meaningful to your customers. If you have made previous batches with the same recipe, the most recent batch **Product Description** will be used.

The **Date** the batch was made is set to the current date. You can change both the name and the date if you want.

### Bar/Portion Quantities and Sizes

These values can be based on the **recipe**, the previous **batch** made with the same recipe if any, or **custom** values you can enter now. When you Save (or Cancel), if you have selected the 'same as

previous batch' option, this will be remembered and used as the default for the next batch you make. Otherwise the next one will default to 'as per recipe'.

The [Waste factor](#) is intended to allow for product loss during processing, such as residue that remains in the pot after pouring into molds.

**Bars (or Portions) Made and Nominal Size** - This area shows the number of bars or portions made, and their size. The Cured Size is determined by the **Expected Shrinkage** setting. You can specify up to 4 sub-batches with different sized bars/portions.

**Tag** - Each sub-batch in this batch must have a unique Tag related to its size or shape. Tags can appear on customer invoices, so use something that will be meaningful to your customers.

The **Excess** indicates whatever is left after making the specified bars/portions, and is affected by the **Waste** factor.

## Stock Used List

For each of the recipe's ingredients and packaging items, the list shows the supply lot (or lots) which were used to make the batch, indicating the purchase **Date**, Supplier and **Lot Number**, followed by the quantity which the batch is **Using**, and how much of that lot is **Left** in stock after the batch is made. The **Cost** for that item is based on the adjusted cost of the supply lot used.

If one or more items have insufficient stock for the batch, or if the quantity left will be less than the re-order threshold you have set in MySupplies, A warning message will appear.

The **Inventory** column (first column of the list), contains a checkbox for each item. When the dialog first opens, every item will be checked (unless it does not have **Track Usage** checked in MySupplies).

Every checked item will have its inventory adjusted when the batch is recorded. If you do not want a particular item to be deducted from your supplies inventory, you can uncheck the box. If you want no supply stock quantities changed, click the **Uncheck All** button on the toolbar (e.g. when documenting old batches).

The **Status Icons** indicate how the supply stock of each ingredient is affected by making this batch. Note that the status applies to the entire stock of that ingredient, not just the individual lot or lots being used for this batch. If there are multiple lots shown for a particular ingredient, only the first will show an icon (except the **Expired** icon will always show for any lot which has passed its expiry date).



| Inv.                                | Name    | Date       | Supplier             | Lot #     | Using     | Cost | Left      |
|-------------------------------------|---------|------------|----------------------|-----------|-----------|------|-----------|
| <input checked="" type="checkbox"/> | Castor  | 2013-01-03 | Oils Galore!         | 201284393 | 4.5 fl oz | 3.10 | 111 fl oz |
| <input checked="" type="checkbox"/> | Coconut | 2013-02-12 | EZ Soapmaking Sup... | 2012234   | 0.75 lb   | 2.19 | 39.3 lb   |
| <input checked="" type="checkbox"/> | Coconut | 2013-01-03 | Oils Galore!         | 201286042 | 0.5 lb    | 1.63 | 0.0 lb    |
| <input checked="" type="checkbox"/> | Lard    | 2013-04-17 | Local grocery store  | 20124859  | 2.38 lb   | 4.75 | -1.38 lb  |
| <input checked="" type="checkbox"/> | Palm    | 2013-02-12 | EZ Soapmaking Sup... | 201248392 | 1.09 lb   | 2.28 | 21.6 lb   |

**Total Stock Left** - The list only shows the stock left for each lot being used in this batch. If you want to know the **total stock** quantity for any ingredient, **hover your mouse** over the stock left quantity shown and a pop-up will show the total stock for that ingredient as shown in the example above.

For more information about how the list is affected by supply **purchase records** and **track usage** setting, see the topic [Supply Lot Tracking...](#)

## Choosing Supply Lots

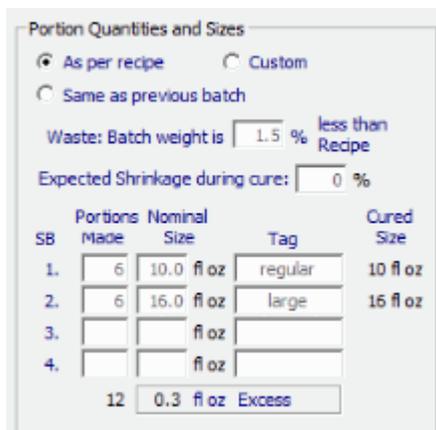
By default, SoapMaker draws stock for each ingredient from the **oldest** supply lot which still has stock remaining. If that lot does not have sufficient stock to fulfill the recipe, then the next oldest lot is also used. So the list may show multiple lots of the same ingredient, indicating how much is needed from each lot. If you prefer to use different lots, or different quantities from the same lots, you can edit any list item - either double-click it, or select it and click the **Edit Lot** button on the toolbar. This will open the **Edit**

**Quantities** dialog:



Here you see all the supply lots which still have stock of the selected ingredient. In this example, there are 3 lots of Coconut oil with stock remaining, and the oldest lot has been selected by default, using 1.25 lb to satisfy the recipe. If you would rather use a newer lot for this batch, or even use some of each lot, you can enter the desired amounts used for each. Click the **Adjust** button next to the original amount to have it automatically adjust as needed to make the total used still match the recipe total.

**Packaging Items**



If you split a batch into sub-batches with different sized bars or portions, you can specify in the recipe the quantity of portions **per sub-batch** and these will be shown in the Portion Quantities and Sizes area.

In the example shown here, we have a liquid soap recipe with two sub-batches and 6 portions in each. Sub-batch 1 portions are 10 fluid ounces, while sub-batch 2 portions are 16 fl oz.

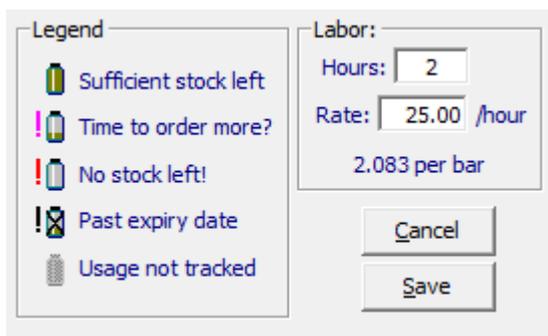
The recipe includes two sizes of pump bottles corresponding to the sub-batch portion sizes, (one bottle for each portion), and labels for the bottles (the bottle labels are the same for both sizes of bottles).

These items are shown in the **Packaging** area of the form as shown below. If you adjust the number of portions made for a sub-batch, the quantity shown in the **Using** column will change accordingly, and when you save the batch your inventory of Packaging items will be adjusted to reflect these quantities.

| Inv. | Name               | Date       | Supplier           | Lot # | Using    | Per    | Cost | Left     |
|------|--------------------|------------|--------------------|-------|----------|--------|------|----------|
| ✓    | pump bottle(small) | 2018-02-21 | EZ Soapmaking S... |       | 6 items  | SB-1   | 3.75 | 18 items |
| ✓    | pump bottle(large) | 2018-02-21 | EZ Soapmaking S... |       | 6 items  | SB-2   | 5.00 | 18 items |
| ✓    | label (bottle)     | 2018-02-21 | EZ Soapmaking S... |       | 12 items | any SB | 1.20 | 38 items |

As with ingredients, you can use the **Edit Lot** button to select a different lot of a particular packaging item.

**Labor**



If your recipe includes labor values, they will be automatically filled in. If desired, you can change them for this batch.

The labor cost per bar/portion is calculated and shown here - this labor cost will be shown for these products in your [Price List](#) as a guide in setting your prices to achieve the desired profit margin.

Labor costs are **not** included in product material costs in any reports.

Note that the labor cost per bar/portion assumes each portion requires the same amount of labor, regardless of portion size.

### Saving the Batch Record

If you are happy with the batch, click **Save**. [MyProducts](#) will open with the new batch selected. Any supply lots which were checked off will have their stock adjusted to reflect the quantity used by this batch. The [Usage History](#) for each of those ingredients will now include this batch.

If your entered bar/portion count and size have left any **excess**, an optional message will remind you that you can **re-use** these scraps as an additive ingredient, or **remove** the excess and record it in the [Stock Removed report](#) - you can use this to account for scraps and designate the cost of these in categories like 'personal use' or 'write-off'.

**Important:** You can adjust sub-batch portions made in MyProducts after saving the batch, but if your batch includes more than one sub-batch, and **packaging items** proportional to sub-batch portions made, changing portions after recording the batch will make your product costs inconsistent with actual packaging item costs and supply inventory.

### Correlating your records

Whenever you Make a Batch, a **Batch Number** is assigned automatically in sequence. It is a good idea to label your actual products with their batch number so you can correlate them with the records in [MyProducts](#).

### Warning Messages

The following messages may appear:

| Message   | Explanation  |
|---|--|
| NOTE: It may be time to replenish one or more stock items   | After making this batch, a supply item will have reached the threshold you set for re-ordering   |
| <p>WARNING: There may be insufficient quantity of one or more stock items!</p> <p>This is accompanied by a 'Beep' warning</p> | <p>This can be caused by any of the following:</p> <ul style="list-style-type: none"> <li>There are no purchase records for this item. The <b>Left</b> column will show 'No Stock' and the <b>Cost</b> will show zero.</li> <li>There are purchase records, but there is no stock left. The <b>Left</b> column will show 'No Stock', but the <b>Cost</b> will be calculated based on the most recent purchase record.</li> <li>There is some stock from this lot, but not enough to satisfy the recipe. The item will show a negative value in the <b>Left</b> column.</li> </ul> <p>Affected supply lots will show zero stock remaining after</p> |

|  |   |
|--|---|
|  | this batch is recorded.   |
| <b>No portions are being made!</b>   | You haven't specified any bars/portions.  |
| <b>Number of bars/portions exceeds recipe size!</b><br><br>This is accompanied by a 'Beep' warning | The excess amount is negative - you need to specify fewer bars or portions, or reduce the nominal size. |

## Window stuff and Shortcuts

You can move the boundary between two ingredient lists by dragging the divider vertically.

If your screen is too small to show the entire form (or you have your resolution set too small), scroll-bars will appear at the bottom and/or at the right side of the form so you can move it to see the hidden portions.

Otherwise, if names are too long to be displayed completely, you can widen the window by dragging an edge.

Press **Alt-S** for Save. Press **Esc** or **Alt-C** to Cancel

## Related Topics

[MySupplies](#) - Supply stocklists

[MyProducts](#) - Product stocklists

[MyRecipes](#)

[The Recipe Form](#)

[MyPreferences](#)

[Canceling a Batch](#)

[Organizing your Products](#) - Tips for naming, organizing and tracking your products

[Removing Product Stock](#) - Batch excess scraps can be accounted for

[Reusing Products as Ingredients](#) - Using your scraps in other recipes

## Organizing your products

### What's the best way to organize my products? **Pro**

To use SoapMaker's product tracking and invoicing features effectively, it's important to understand these concepts:

- **Recipes** are used to make **Product batches**. A successful recipe should be static, and used to make many batches of the same product.
- **Recipe names** should be meaningful to you, and reflect their key makeup.
- Your products should be given **Product Descriptions** that will be meaningful to your customers, and good for marketing.
- Each product batch can be split into sub-batches with different sizes or shapes. Each sub-batch must have a unique **Tag** within the batch. These can appear on customer invoices, so should be meaningful to customers. (If you never split batches into sub-batches, you can just leave the Tag 'regular' which is assigned by default.)
- Each unique combination of **Product Description** and **Tag** may be assigned a unique **Product Code** that is maintained on your [Price List](#), and can serve as the product identifier when importing

sales data from a point-of-sale system or web shopping cart.

To illustrate these concepts, consider the following simple example... imagine you have two recipes used to make products as follows:

| <b>Recipe Name</b>         | <b>Olive-Coconut-Lavender</b> |         | <b>Palm-BayRum-FO</b> |         |
|----------------------------|-------------------------------|---------|-----------------------|---------|
| <b>Product Description</b> | <b>Memories of Provence</b>   |         | <b>Smooth Shave</b>   |         |
| <b>Bar Size</b>            | 5 oz                          | 2.5 oz  | 5 oz                  | 2.5 oz  |
| <b>Sub-batch Tag</b>       | Large                         | Regular | Large                 | Regular |
| <b>Product Code</b>        | SB-01-L                       | SB-01-S | SB-02-L               | SB-02-S |

Every batch of the 'Smooth Shave' product will have 2 sizes of bar, tagged 'Large' and 'Regular', with the product codes shown.

### Assigning Identifiers

Let's assume the soap recipe called 'Olive-coconut-Lavender' makes 30 bars of 5 oz each. When you first record a batch with this recipe, the **Product Description** will default to the recipe name. But you can change the Product Description to something with more marketing appeal, like 'Memories of Provence' in our example, and if your recipe doesn't specify multiple sub-batches, you can split the batch into as many as 4 sub-batches with different sized bars in the [New Batch dialog](#) (or later by editing the batch in [MyProducts](#)).

Now we have defined 2 products: **Memories of Provence - large**, and **Memories of Provence - regular**. When you sell these, this is how they will appear on the invoice.

Each time you make subsequent batches with the same recipe, the new batch record will automatically be filled in initially with the same **Product Description** as the most recent batch made with that recipe. The sub-batch **size mix** and **Tags** will be as specified in the recipe, but you can choose to use the same ones as the last batch instead, or create a custom set for the new batch.

### Different Batch Sizes of the same product

Sometimes you may want to make larger or smaller batches of an existing product. In this case, you can [resize](#) the recipe and save it with a different name. For example, you could have recipes called 'Olive-Coconut-Lavender - double size' and 'Olive-Coconut-Lavender - half size' or something similar. When you make batches with these recipes, you will still use the same **Product Description** 'Memories of Provence' and the same **Tags** for the same sized bars/portions.

### Tracking Product Stock

If you use consistent product naming as described above, then you can see at a glance how much you have in stock of a particular product by choosing the option to **Show Batches by Product Description** in [MyProducts](#). You can display all products, or just a particular one. The list shows all batches saved for the selected product description so you can see whether each batch is ready to sell, and the total number of bars made, sold and remaining in stock. The list can be sorted on any column by clicking the heading.

### Price List

The [Price List](#) feature enables you to define **prices** and **product codes** for all your standard products. You can then have the option to fill them in automatically when you create customer invoices.

### Changing your Mind Later

Don't fret about getting it right the first time. When you edit a batch record and change the **Product Description** or any **Tag**, you will be given the option of automatically changing all other **batch records** and **price list entries** with the same previous Product Description. So, for example, if you decide that

'Memories of Provence' is not a good product name, you could change it to 'Lavender Blue' for all saved batches of the 'Memories of Provence' product with a single operation.

## Supply lot tracking

When you record a batch, the lots shown for an ingredient and the cost depend on several factors, including purchase records and whether the item is tracked in MySupplies.

If **Track Usage** is not checked in MySupplies, the New Batch dialog inventory checkbox will be unchecked, and the **Quantity Left** column will show 'Not Tracked'. If there are any saved purchase records for this item, the **Cost** will be based on the most recent purchase, otherwise it will be zero.

If **Track Usage** is checked in MySupplies, and there are saved purchase records then:

- If any purchase records were **not** marked Not for Business when saved, then the inventory checkbox will be checked and the **Cost** will be based on the cost of the supply lot shown. The **Quantity Left** column will show how much will remain after this batch is made. If there are other purchase records available, you can use the **Edit Lots** feature to specify different amounts from different lots.
- If the only purchase records were marked Not for Business (showing 'non-inventory' in the purchase history), then the inventory checkbox will be checked, but the **Quantity Left** column will show 'no stock', and the **Cost** will be based on the most recent purchase.

If Track Usage is checked but there are no saved purchase records, then the inventory checkbox will be checked, but the **Quantity Left** column will show 'no stock', and the **Cost** will be zero.

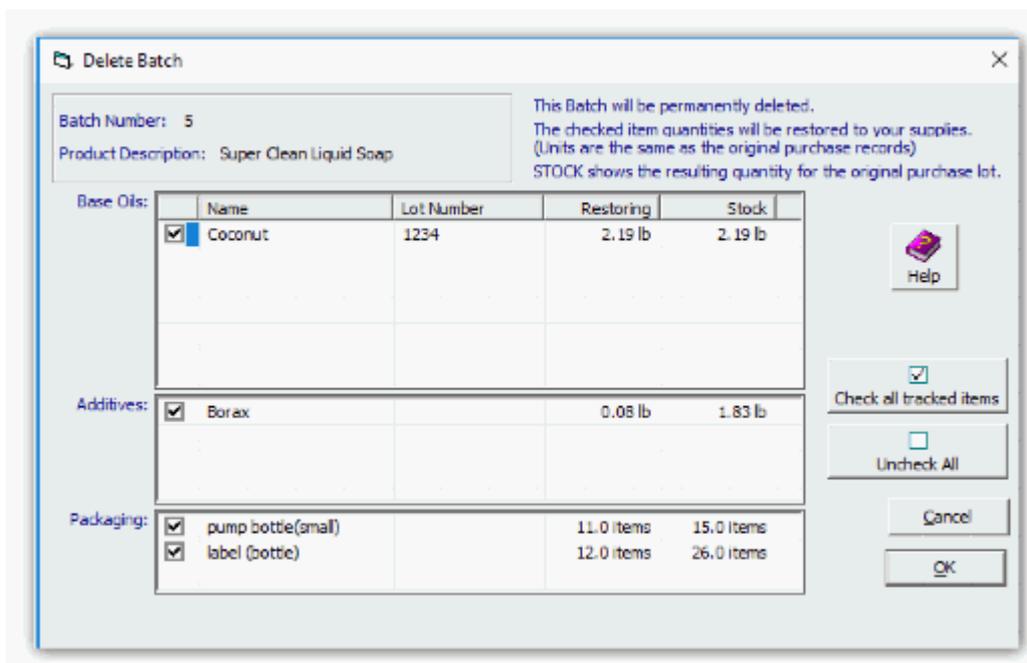
## Cancelling a batch

**Pro** If you recorded a batch and then changed your mind, you can **Cancel** the batch and have all its recipe's ingredients and packaging items restored to the MySupplies stocklists.

To cancel a batch, select it in the MyProducts [Batch List](#), and click the toolbar **Delete** button - you will be given the option to restore the ingredients used to your supplies inventory. You can also right-click and choose **Delete Batch** from the pop-up menu.

Note: If you have already sold some products from the selected batch, or have transferred some to another location, you will not have the option to restore ingredients to your supplies stock.

The **Delete Batch** window will open. It lists each of the recipe's ingredients and packaging items, showing how much will be **restored**, and the resulting **total stock** of each item.



Only items with the **Track Usage** option set in MySupplies are checked. If you do not want a particular

item restored, **uncheck** it in the list. If you check items showing 'No Stock', or if there are no supply purchase records with capacity to receive the quantity to be restored, you will see a warning that not all ingredients could be restored to your supplies stock.

If you want to proceed, click **OK**, or else **Cancel**.

## Window stuff and Shortcuts

If names are too long to be displayed completely, you can widen the window by dragging an edge. You can move the boundary between two ingredient lists by dragging the divider vertically.

Press **Enter** for OK. Press **Esc** to Cancel

## Related Topics

[MySupplies](#) - Supply stocklists

[MyProducts](#) - Product stocklists

[MyRecipes](#)

[Making a Batch](#)

## Creating Product Labels

### Exporting Recipe Ingredient Lists

SoapMaker can help in creating product labels with sorted ingredient lists. The **Export Ingredient List** command creates a text file which can then be edited in your favorite word processor to produce a product label.

Open a recipe and click the **Export/Ingredient List for labels** button, or choose **Export Ingredient List...** under the main File menu. You will be shown a number of options, and then asked to choose a location for the exported file.

Based on the options you choose, the list can contain the ingredient **common names** (as shown in the recipe form), the [INCI names](#), and the **percentage** of the total recipe by weight. You can also choose the way ingredients are separated in the list for easy editing to make labels.

The recipe ingredients are listed in the exported file, sorted by **quantity** with the largest quantity ingredient first. If the same ingredient has multiple entries in the recipe (e.g. a base oil, or extra water, in the Additives list), a single entry will appear in the exported list, positioned according to the total quantity used in the recipe.

If the recipe contains a custom **blended** ingredient, the list will include the component ingredients of that blend. If it contains a [reused product](#) as an additive (e.g. your pre-made soap base), the ingredients from that product will also be included in the list.

If a soap recipe specifies pre-mixed lye, the water portion of the pre-mixed solution will be included in the total water quantity, and the lye quantity will be only the dry lye portion.

## Recording Product Sales

**Pro** This is one of the key activities for managing your inventory with SoapMaker. Create a [Sales Register](#) for the products you sell directly at a sales venue (e.g. craft sale, farmers market, etc.), and for products you deliver or ship to a customer. The sales register can be used to create a customer invoice and/or a way-bill (shipping list).

Products included in the sales register will be automatically removed from your inventory.

You can create a sales register and add items directly from your stock in [MyProducts](#), or you can [import](#) a list of items from your Web sales or point-of-sale application.

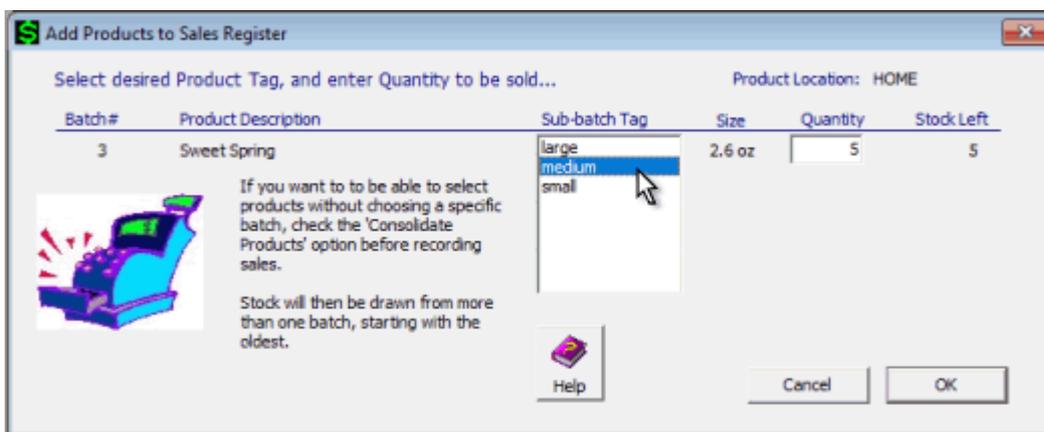
To record sales from MyProducts, double-click the associated batch in MyProducts [Batch List](#), or select it and click the toolbar **Sale** button, or right-click and choose **Record Sales** from the pop-up menu.

| Batch | #SubBatches | Product Description | Recipe              | Date Y-M-D |
|-------|-------------|---------------------|---------------------|------------|
| 1     | 1           | Smooth Shave        | Bay Rum Shaving     | 2016-02-17 |
| 2     | 2           | Scrubby Clean       | Oatmeal Exfoliating | 2016-03-14 |
| 3     | 3           | Sweet Spring        | Pink Lip            | 2016-03-01 |
| 4     | 1           | Cream Soap example  |                     |            |
| 5     | 1           | Hand Lotion example |                     |            |
| 6     | 3           | Sweet Spring        |                     |            |

atches: 8  
shown: 8

- Record Sales (Dbl click)
- Transfer to another location (ALT-Dbl click)
- Move to Supplies for re-use
- Remove or write-off products
- Delete selected Batch(es)
- Make another Batch like this one...
- Open Batch Recipe
- Sales History for this Batch
- Supply Lots used for this Batch

The **Add Products to Sales Register** dialog will open, with the selected batch entered...

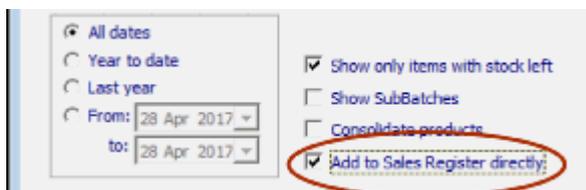


If the selected batch has more than one sub-batch, choose the desired **Tag** and then enter the **quantity** you are selling. Click the **OK** button (or press Enter) to add these products to the [Sales Register](#). To close the window without adding these products, click **Cancel** or press **Esc**.

To add additional products to the same sales register, leave the register open and double-click another batch in MyProducts.

When you have added all the products for this sale, complete the [Sales Register](#) and save it. Click **Save and Show** on the toolbar if you want to view the saved register or print an invoice.

### Option to Skip 'Add Products' Dialog



If you prefer, you can add product items directly to the [Sales Register](#) without first selecting a Tag or entering a quantity. You can then select Tags and enter quantities on the Sales Register after adding all the desired product items.

To choose this option, check the box on MyProducts labeled **Add to Sales Register Directly**.

## Consolidated Batches

If you want to be able to select products for sale without choosing a specific batch, check the **Consolidate Products** box before recording sales. Stock will then be drawn from multiple batches of the same Product Description and Tag, starting with the oldest batch.

This is handy if you are selling a larger quantity of a particular product than one batch worth.

## Window stuff and shortcuts

In the **Add Products to Sales Register** dialog:

- Press **Enter** on your keyboard instead of clicking the **OK** button.
- Press **ESC** to Cancel and close the dialog.

## Related Topics

[Sales Register](#) - Completing the Sales Register form

[MyProducts](#) - Product stocklists

[Importing Sales Records](#) - Recording sales from Web or POS system

[Customer List](#) - Manages your customer information, including address and contact

[Sales Registers/Invoices Report](#) - Shows all your sales registers

[Price List](#) - Set up your product codes and prices

[Sales History Report](#) - Shows information about every product sold

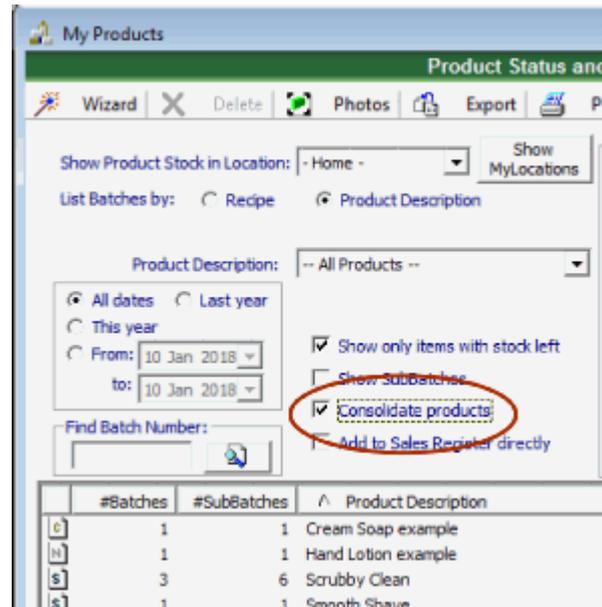
[Sales Tax](#) - Setting up and using SoapMaker's Tax features

## Sales Register

**Pro** The **Sales Register** window will open when you first enter products to be sold from MyProducts. To add more products to the register, select the associated batch in MyProducts and double-click it, or click the **Sale** button again. Each batch you select will be added to the register list.

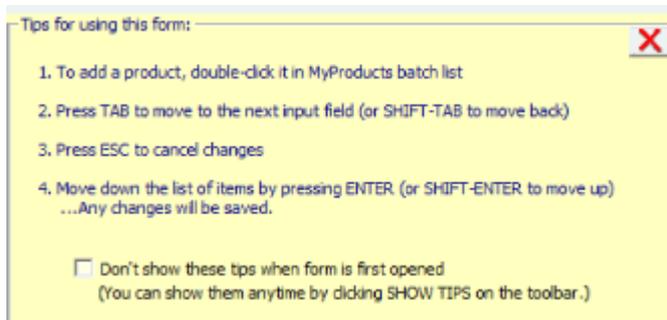
You can also create a Sales Register by [importing](#) sales records from a web shopping cart or point-of-sale application.

Here is an example of a register with 3 items added:

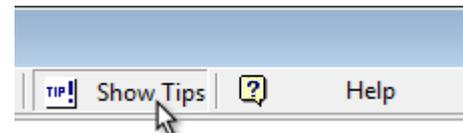


### Tips Window

When you first open the Sales Register form, a **Tips** window may appear in the lower left corner. It explains how to efficiently add more product items to the list. If you no longer need to see this window, check the box labeled Don't show these tips when form is first opened. Then click the **X** in the corner to close it.



You can show the Tips anytime by clicking this button on the Toolbar:



Unclick it to hide the Tips window.

### Editing Items

When an item is first added to the list from MyProducts, it will not have a **price** or **tax** selection. It may also not have a **Tag** selected if there are multiple sub-batches of that product. Items which are incomplete, will show an **exclamation mark** at the left side, and when the item is selected, an **instruction message** will be displayed above the edit area as shown here:

To edit an item, select the item from the list - it will appear in the **Edit area** at the top, where you can

then make any changes needed to add missing values or change values.

Press the **Tab** key to move to each field. When finished editing this item, press **Enter** or click the **Save Item** button.

| Product Code | Quantity | Unit Price | Total | Tax  | Included in price                   | Profit | Stock Left |
|--------------|----------|------------|-------|------|-------------------------------------|--------|------------|
| 3-02-M       | 10       | 7          | 70.00 | Tax1 | <input checked="" type="checkbox"/> | 65.14  | 5          |

To discard any changes, click **Cancel** or press the **ESC key** on your keyboard.

## Remove a product item

If you have added an item by mistake, select it and click the **Delete** button to remove it from the list.

## Entering Prices

### Enter Prices Directly

You can enter the price for each item directly on this form. You can choose to enter unit prices, and have SoapMaker calculate the totals, or you can enter the total for each line - the unit price will be calculated (this may be handy if you sell at a venue using bulk prices like 3 for \$20).

| Quantity | Unit Price | Total |
|----------|------------|-------|
| 10       | 7          | 70.00 |

Select each item in turn (press **ENTER**, or use the keyboard arrow keys to move up or down the list), press **Tab** to move to the Price box in the **Edit area**, and enter the price for this item. Press **Enter** to save the price.

### Fill Prices from Price List

Instead of entering the price for each line, you can set up a standard [price list](#) for all your products, then use it here to automatically fill in the **prices** and **product codes** as follows:

1. Add all the product items for this sales register and make sure you have selected the correct **Tag** for each if that batch has multiple sub-batches.
2. Select the desired **Price Category** from the drop-down list (e.g. Retail or Wholesale).

3. Click the **Fill Prices button** to fill in the price and product code for each item.

All prices which are zero or blank will be filled in with the prices saved in your price list if there is a matching entry with the same **Product Description** and **Tag**.

**Product Codes** will be filled in for all items to match their Price List values, regardless of whether the price is filled in.

If you need to change the price list before using it, click the **Price List** button to open it. Then make your changes and save it before using the **Fill Prices** button.

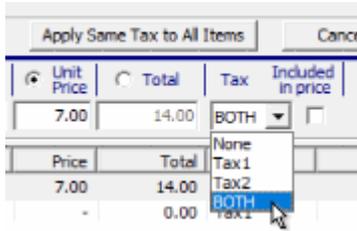
If you change your mind after filling in all the prices, you can clear them all by clicking the **Clear Prices** button.

## Stock and Profit Calculation

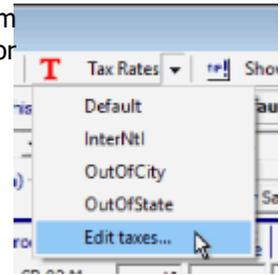
After entering a quantity and price for each item, your **profit** and the **stock left** (number of bars/portions that will remain in your stock) are shown. If you enter a quantity larger than the number you have in stock, the **stock left** number will be highlighted like this: **! -6**. If there are several items in the list from the same batch and sub-batch, they will all show the same stock quantity which reflects the cumulative effect of those sales.

## Taxes

If this invoice is for sales in a different tax region, select the desired tax group from the drop-down menu. Or select Edit taxes if you need to define a new tax group, or change the tax rate or cost/credit option for an existing tax.



If you collect sales tax or value-added tax, select the appropriate tax from the drop-down list for the item currently being edited.



For venue sales, you may prefer to include any tax in your prices instead of having to calculate tax and add it on for each sale. In this case, check the **Included in price** box.

If every item will have the same tax, click the **Apply Same Tax to All Items** button. Or click the **Use 1st item's Tax Rate for All Items** button at the bottom of the form.

### Edit Tax Totals

SoapMaker calculates the tax totals by applying the selected tax rate to each item and summing the results. But if you are importing sales records, or entering sales from a venue, then each item represents an isolated transaction, and the tax amount for each item was probably rounded to the nearest cent. For this reason, the tax totals calculated by SoapMaker may be slightly different from those actually collected.



If this is the case, you can edit the tax total amounts by clicking the **Edit Tax Totals** button - this will allow you to edit the total amounts. The button label will change to **Revert to Calculated Totals**; click it to restore the calculated values.

### Gratuities

If you receive tips while selling at a venue, you can record these in the **Gratuities** box. This will show up on the [Tax and Income Summary report](#) as a separate line item with your annual sales.

### Customer and Date

Select the **customer name**, or **sales venue**, from the drop-down list, or create a new one by choosing **+New Customer or Venue**.

Select the customer **branch**, or create a new one by choosing **+New Branch**.

If the current date is not what you want, select the desired date from the drop-down calendar.

### Packing Items

If you will be mailing or shipping this order, you can enter the packing items here.



The total cost of packing items can guide you in setting your **handling fee** for the order, which will be included in the **shipping and handling** amount if you print an invoice.

Note: the estimated packing costs shown are based on your most recent purchases of these packaging items, but when you save the register, the actual costs will be calculated based on the supply lots from which stock is drawn (the oldest lots with stock still remaining).

When you save the sales register, any packing items you have included will be deducted from your

Packaging inventory in MySupplies.

## Invoice

If you intend to create a **customer invoice** from this register, then enter the following:

- **Customer Discount** if any. You can enter either a **percentage**, or the actual **amount** of the discount.
- **Postage Cost** (this should be your actual cost to ship these items). If you select a tax here which is defined with the 'credit' option, the tax on postage will be included in your tax credits shown on the [Tax & Income Summary report](#).
- **Handling Fee** (whatever you want to charge to cover your labor and packaging to ship these items).
- **Memo** - enter any message you wish to appear on the invoice, or choose a pre-stored message from the list.

To add a new message to the list of stored messages, choose **Add or Change Messages..** from the drop-down list.

The **Invoice Number** is assigned automatically in sequence. If you want to track whether the invoice has been paid, check the **Track Payment** box. When you save the invoice, it will initially show 'Unpaid'.

On the printed invoice, the Postage cost and Handling fee are combined into a single 'Shipping and Handling' item.

## Card Processing Fee

You can enter a fee you have to pay for credit card processing here:

|                |        |                          |           |
|----------------|--------|--------------------------|-----------|
| Total Tax:     | 101.85 | For Tax & Income Summary |           |
| Invoice Total: | 780.85 | CCard Fee:               | 2 % 15.62 |
|                |        | Net Profit:              | 636.19    |

Either enter the **percent** of the invoice total, or the actual **amount**. This will not appear on the printed invoice, but will show up in your business costs as an item on the [Tax and Income Summary](#) report.

## Finishing

When you are finished, click either **Save and Close**, or **Save, Show Invoice** on the toolbar. (You can always show the invoice later.) The register is saved and can be viewed, edited or printed from the [Sales Registers/Invoices](#) report.

To close the window without saving, click **Cancel**.

## Booth Fees

The Sales Register form does not provide a way to record booth fees for venue sales because in general there will be other expenses as well, such as travel, meals, etc. For information on recording these, see the topic [Venue sale Expenses...](#)

## Window stuff and shortcuts

The **Sales Register** window is intended to be used together with MyProducts unless you are importing sales records from a file.

When you first open it from MyProducts, SoapMaker attempts to position it adjacent to the MyProducts window if there is space. If one window partially obscures the other, you can move either by dragging its

top. You can make the window larger by dragging the bottom or top edge vertically.

Double-click a batch record in MyProducts to add it to the register.

Press **Enter** to save changes to an item, or to move down to the next item in the list. Press **Shift-Enter** to move up to the previous item.

Press **ESC** to cancel changes to the current item.

Press **Ctrl-S** on your keyboard to **Save** and show invoice

## Related Topics

[MyProducts](#) - Product stocklists

[Importing Sales Records](#) - Recording sales from Web or POS system

[Customer List](#) - Manages your customer information, including address and contact

[Sales Registers/Invoices Report](#) - Shows all your sales registers

[Price List](#) - Set up your product codes and prices

[Sales History Report](#) - Shows information about every product sold

[Sales Tax](#) - Setting up and using SoapMaker's Tax features

## Price List

**Pro** To open this tool, select **Price List** under the main **Products** menu, or click the **Price List** button on the toolbar of the [Sales Register](#) form.

This is a 'modal' form - when you have finished using it, you must close it before you can do anything else in SoapMaker.

By saving the standard prices of all your products in this list, you can then automatically fill in the prices when creating a new sales register or invoice. You can save lists in different categories (e.g. **retail** or **wholesale**) by selecting from the Category list.

| Product Description | Most Recent Batch | Bar/Portion size | Tag     | Latest Material Cost | Labor Cost | Total Cost | Unit Price | Product Code | % Margin | Total Stock |
|---------------------|-------------------|------------------|---------|----------------------|------------|------------|------------|--------------|----------|-------------|
| Liquid Soap Example | 2020-10-12        | 10 fl oz         | regular | 1.438                | 5.000      | 6.438      | 12.00      | LS-01        | 46.4     | 20          |
| Smooth Shave        | 2020-10-12        | 6.0 oz           | large   | 2.249                | 2.500      | 4.749      | 9.00       | SB-SH-03     | 47.2     | 30          |
| Smooth Shave        | 2020-10-12        | 4.3 oz           | medium  | 1.647                | 1.667      | 3.313      | 7.00       | SB-SH-01     | 52.7     | 76          |
| Smooth Shave        | 2020-10-12        | 3.0 oz           | small   | 1.195                | 1.667      | 2.861      | 5.00       | SB-SH-02     | 42.8     | 35          |
| Sweet Spring        | 2020-10-12        | 4.3 oz           | medium  | 1.446                | 1.563      | 3.009      | 7.00       | SB-SS-01     | 57.0     | 94          |

Total Unique Products/Sizes: 5      Total Products/Sizes with Stock: 5      Total Stock: 255

When you first open the **Price List** form, it populates with all your products - each unique combination of **Product Description** and **Tag** recorded in the batch list of [MyProducts](#) appears as a single line in this list.

**Most Recent Batch** shows the date when the most recent batch of that product was recorded, while the **Total Stock** shows the total of all batches with the same description and Tag in all locations, or in the location you select from the drop-down list.

**Bar/Portion Size** shows the cured size of each product, which should normally be related to the **Tag**.

**Latest Material Cost** shows the material cost for each bar/portion based on the latest batch (actually the highest numbered batch of that product)

**Labor Cost** shows the labor cost per bar/portion set in the associated recipe's [labor](#) section and recorded with the latest batch of this product.

**Total Cost** shows the total of material cost and labor cost for each bar/portion of this product. This provides a guide for setting your prices to achieve the desired profit margin.

**Total Stock**, shows the number of products still remaining in your stock at the selected location. You can choose to show stock in the **Home** location, another location (e.g. consignment customer), or **all** locations.

### Viewing the Price List

If there are more products than can be displayed on one page, the **page controls** appear at the top - click the right arrow to move to the next page, and the left arrow to move to the previous page.



At the bottom of the window, you can see the total number of unique product types with saved batch records in MyProducts, the total unique product types with stock remaining, and the total quantity of product stock remaining in the selected location.

If you have many saved batches with no stock remaining, you can shorten the displayed list by checking the box labeled '**Show only products with stock remaining**'.

You can **search** the list by typing part of a Product Description in the search box. To cancel the search, click the **X** button.



### Filling in your Price List

Select the **price category** depending on which list you want to edit.

Enter the **Unit Price** for each product. If you typically set the same price for the same size of different products, you can use the **Copy Prices** button to avoid having to enter the same price in each row. (see the description under **Commands** below).

You can also define **product codes** here. These can be used as **SKU codes** ('stock-keeping units') which can be shown on your customer invoices, and may be useful if you export this list for later input to a website shopping cart or point-of-sale system.

The **% Margin** column shows your profit margin (profit as a percentage of your selling price). You can use this as a guide in setting your prices. On this form, margin is calculated using both the material cost and the labor cost (if any).

The Price List can be printed, or exported as a CSV file which can then be opened and edited in a spreadsheet program such as Excel or Libre Office. The **printed** list will be as displayed (e.g. retail or wholesale), but when you **export** the list, all price categories will be included, along with the respective margins.

When finished making changes, be sure to Save the form by clicking the **Save** button, or pressing Ctrl-S on the keyboard. You can close by clicking the X in the upper right corner as with any window.

### How to use your completed Price List and Price Categories

By entering your prices here, you can then automatically fill them into each new [sales register](#) you create.

For [importing](#) sales records from your website or point-of-sale application, define unique **Product Codes** here that match those used to identify your products where they are sold.

You can create new price categories in [MyPreferences](#) to suit your needs - for example, you may have preferred customers with different prices. When filling in prices in a new [Sales Register](#), you can choose which category to use.

You can also specified a **preferred category** for each customer in your [Customers List](#). Then when recording sales, the correct category will automatically be selected. On the [Sales Registers/Invoices report](#), you can filter the display by price category to only show related customers.

### Please Note:

- Products which were previously saved in the list will no longer appear if you have deleted all batches with that **product description** in MyProducts.

- The Price or Code previously saved for a product may not appear if you have changed the product **Tag** in MyProducts unless you accepted the offer to update the Price List with the new Tag at the time.

## Commands

The following commands are available from the **toolbar**:

|                    |  |
|--------------------|--|
| <b>Cancel</b>      | Close the window without saving any changes.   |
| <b>Copy Prices</b> | If you typically set the same price for each product <b>Tag</b> regardless of which product, you can use this command to automatically fill the list whenever you make a price change. Simply enter the new price in the first item with that Tag, then click the <b>Copy Prices</b> button - the new price will be copied to every other entry with the same Tag. |
| <b>Export</b>      | The price list is saved as a CSV format file which can be opened in a spreadsheet. For more information on export format, see the topic <a href="#">Exporting Price List</a> .   |
| <b>Print List</b>  | The entire list is printed. You will have the option to preview it first.  |
| <b>Save</b>        | The list is saved with any changes you have made.  |
| <b>Help</b>        | Open this Help topic.  |

## Keyboard Shortcuts

- Ctrl-S:** Save changes
- ESC:** Cancel changes and close
- TAB:** Move right, or down to next row
- ENTER:** Move down one row
- Shift-ENTER:** Move up one row

## Related Topics

[Exporting Price List](#) - Exporting to a spreadsheet or for import into Square

[MyProducts](#) - Product stocklists

[Recording Product Sales](#) - Creating a sales register or invoice

[Importing Sales Records](#) - Recording sales from Web or POS system

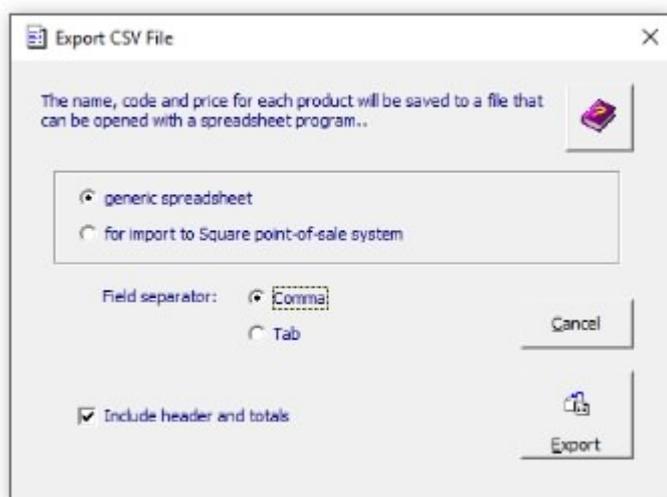
[Organizing your Products](#) - Tips for naming, organizing and tracking your products

[Exporting Price List](#)

**Pro** Your Price List can be exported as a CSV file to be opened with a spreadsheet, or imported into other systems.

For example, if you use the Square point-of-sale system, you can export your product names, codes and prices and then import them to your Square library.

Select the Export button on the toolbar - this will open the Export Dialog:



You can choose to export to a generic spreadsheet, or specially formatted for importing to the Square point-of-sale system. After selecting the desired options, click the **Export** button - you will be asked to select the location and name for the file to be saved.

### Generic spreadsheet format

This option will create a file with all the displayed information, as well as prices in all defined price categories. You can open this file in any spreadsheet application.

Select the desired field separator (either comma or tab). When opening the file later, you may have to specify to your spreadsheet application which separator character has been used.

If you check the box labeled **Include header and totals**, the file will include a header line identifying what it contains and when it was exported. Stock totals will be shown on the last line.

### For Import to Square

If you use the popular **Square** point-of-sale system, you can export a specially formatted file which can then be use to import your product list to Square, with names, codes prices, and locations.

You will then be able to export your Square sales results and import them into SoapMaker to create sales records and update your product stock (see the topics [Importing Sales Records](#) and [Importing from Square](#)).

These instructions assume that you use SoapMaker for your product inventory control, and only use Square to process sales. For this reason, the exported Price List information will not include stock levels. If you attempt to do inventory control with both SoapMaker and Square, frequent imports and exports will be required to keep them synchronized.

### Locations

When you export your Price List for importing to Square, the resulting file will have a set of columns for the selected location, or for every location if you select 'all locations' for the Price List. The column headers will include the location **description** (e.g. 'Enabled <location>'). To save having to edit the spreadsheet after exporting, you can edit your SoapMaker location descriptions to match those used in Square (see the topic [MyLocations](#)).

### Ready to export

Before exporting for Square, make sure to select the desired **Price Category** - this will determine the prices that will be imported to Square.

Select a desired location, or select 'all locations' if you have defined several in Square.

The exported file will contain the following columns:

1. **Token** - this is left blank. Square will assign a unique token to each product.
2. **Item Name** - this is your **Product Description** as shown in the Price List
3. **Description** - this will be the **recipe name**, but you can change this to anything you like

4. **Category** - this will be the **recipe type**, but you can change this too.
5. **SKU** - This is your **Product Code** as shown in the Price List
6. **Variation Name** - This is the product **Tag** as shown in the Price List.
7. **Price** - This is the price currently shown in the Price List (based on the selected **Price Category**)

In addition, the following columns will be saved for each product location you have defined, where **LOC** = your defined **Location Description**:

8. **Enabled LOC** - set to 'Y' for Yes
9. **Current Quantity LOC** - blank
10. **New Quantity LOC** - blank
11. **Stock Alert Enabled LOC** - blank
12. **Stock Alert Count LOC** - blank
13. **Price LOC** - blank

Open the exported file in a spreadsheet program, and make any changes needed. Then save it and import it into Square (Item Library / Actions / Import Items).

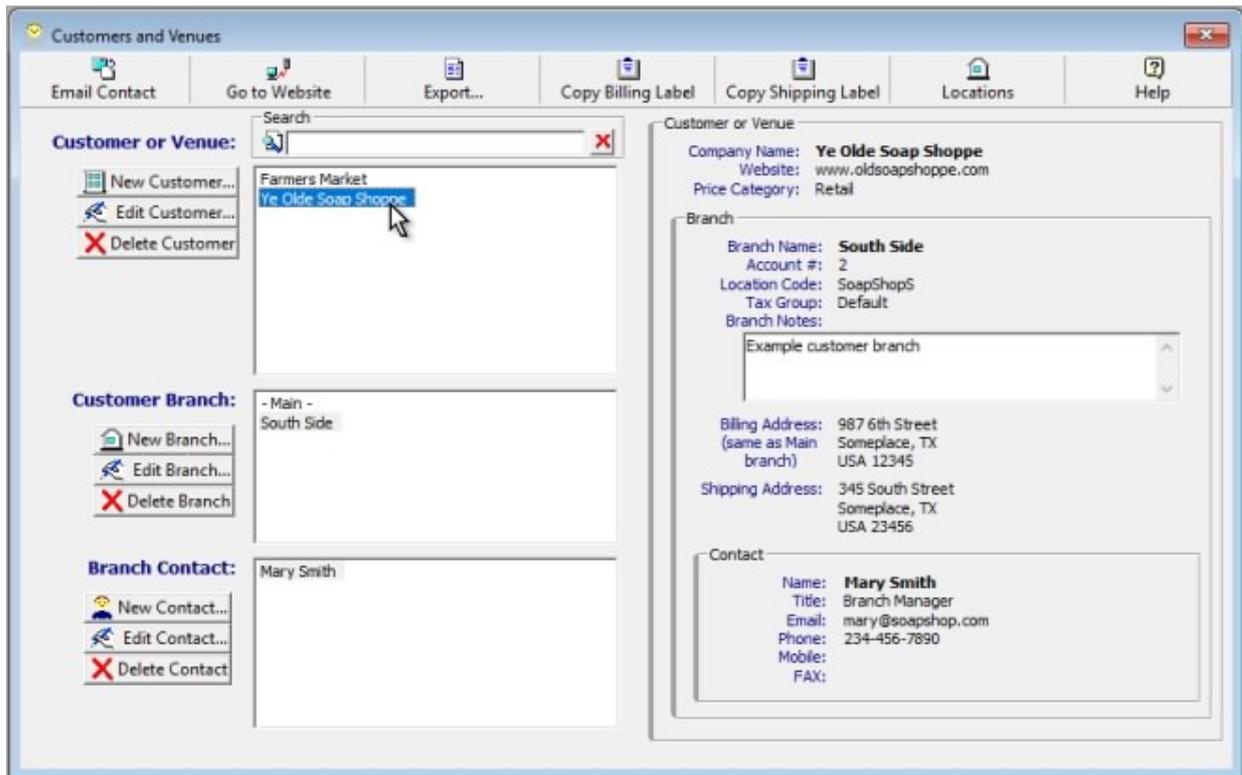
For more information, see this webpage: <https://squareup.com/help/ca/en/article/5153-import-items-online>

## Customer List

**Pro** The **Customers and Venues list** shows all your Customers and Sales Venues, including branch addresses, and contacts. From here you can add a new Customer/Venue, or edit the information for an existing one.

To open the Customers list, select **Customers List** under the main **Products** menu. It can also be opened from the [Sales Registers/Invoices report](#), and the [Sales History report](#). Whenever you record new sales, you can select the customer and branch from a list on the [Sales Register](#) form.

The Customers list is organized in 3 sections: **Customer/Venue**, Customer **Branch**, and Branch **Contact**:



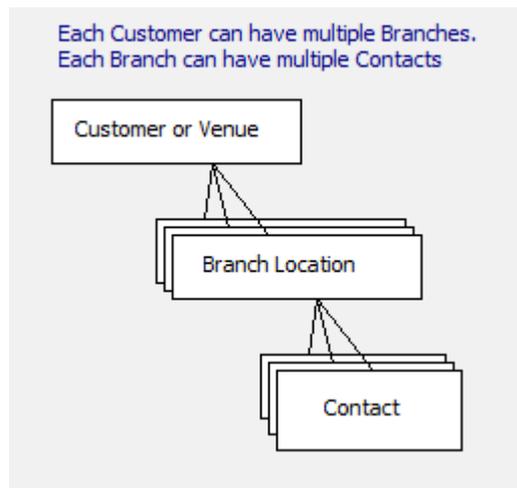
Each Customer or Venue can have multiple Branches. All Customers have at least a **Main** branch. Each Branch can have multiple Contacts.

When you select a customer, branch or contact by clicking it in the list, the corresponding information is displayed on the right side of the window.

This example shows the customer "Ye Olde Soap Shoppe" selected. It has two branches, with the 'South Side' branch selected. That branch has one contact - 'Mary Smith'.

Each list section has the following buttons:

- New...** Use this to add a new customer/venue, branch or contact.
- Edit...** Make changes to the selected item.
- Delete** Delete the selected item. If you delete a customer, all its branches and their contacts are also deleted. If you delete a branch, all its contacts are deleted.



### Customer Information:

Each customer/venue has a unique **Company Name**. In addition, you can define the following:

- **Website** - If you save the customer's website address, you can click a button to open a browser and go to that site.
- **Price Category** - When recording sales, you can automatically fill prices from your [Price List](#) with the appropriate price category (e.g. retail or wholesale).

To add a new customer or venue, click the **New Customer** button, enter your information, and click **Save**. When defining a new customer, you can also define the Main branch information, and one main branch contact at the same time.

To make changes to an existing customer, click the **Edit Customer** button.

## Branch Information:

Each branch has a **Branch Name** unique within that company. In addition, you can define the following:

- **Account number** - An arbitrary number you use for this particular branch
- **Consignment Location Code** - If you provide a code here, this creates an alternative **product location** linked to this customer branch. In MyProducts, you can [transfer](#) products to this location when doing consignments.
- **Preferred Tax Group** - When recording sales, the tax group will automatically be set to this when you select this customer and branch on the [Sales Register](#) form.
- **Billing Address** - Can be unique for this branch, or **Same as Main Branch**.
- **Shipping Address** - Can be different from Billing Address, or **Same as Billing Address**. These addresses will appear on customer invoices, and can be used to make labels.
- **Notes** - You can enter any notes about this branch for your own use.

To add a new branch, click the **New Branch** button, enter your information, and click **Save**. When defining a new branch, you can also define one contact at the same time.

To make changes to an existing branch, click the **Edit Branch** button.

## Contact Information:

For each contact, you can define the following information:

- **First and Last Name** - These will be displayed in the list of contacts
- **Title** - You can leave this blank if desired
- **Email** - If the selected contact has an email address defined, you can start a new email message by clicking the **Email Contact** button on the main toolbar.
- **Phone numbers** - You can save 3 numbers for each contact.

To add a new contact, click the **New Contact** button, enter your information, and click **Save**.

To make changes to an existing contact, click the **Edit Contact** button.

## Search

If you have many customers, you can locate and select one quickly by starting to type the name in the **Search** box. The first match will be selected in the list. To clear the search, click the **X** next to the box.

## Main Toolbar

The main toolbar at the top of the window has the following buttons:

**Email Contact** - Start an email to the selected contact

**Go to Website** - open your browser and connect to the customer's website.

**Export** - Save information as a TXT file that can be opened in a word processor, or CSV file that can be opened in a spreadsheet.

The following options are available for exporting:

- Selected Customer (with all its Branches) as TXT file - All information including branch contacts.
- All Customers, Branches and Contacts as TXT file - All information from all lists
- All Customers and Branches as CSV file - All Customer and Branch information (but not contacts)
- Contact List for all Customers as CSV file - All contact information for all branches

**Copy Billing/Shipping Label** - Copy the selected customer branch **billing address** or **shipping address** to the clipboard so it can be pasted into a word processor to make a mailing label.

**Locations** - Open [MyLocations](#) to see all existing **Location Codes**. You can define new location codes in MyLocations, or do it as part of the process of defining a new customer branch, or by editing an existing branch.

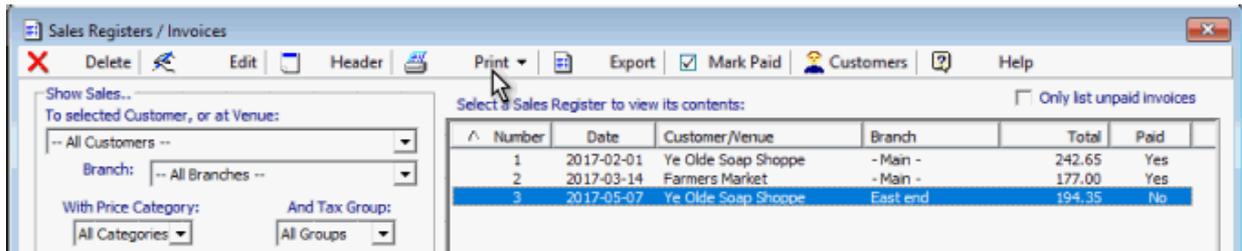
**Help** - Open the Users Manual to this page.

## Related Topics

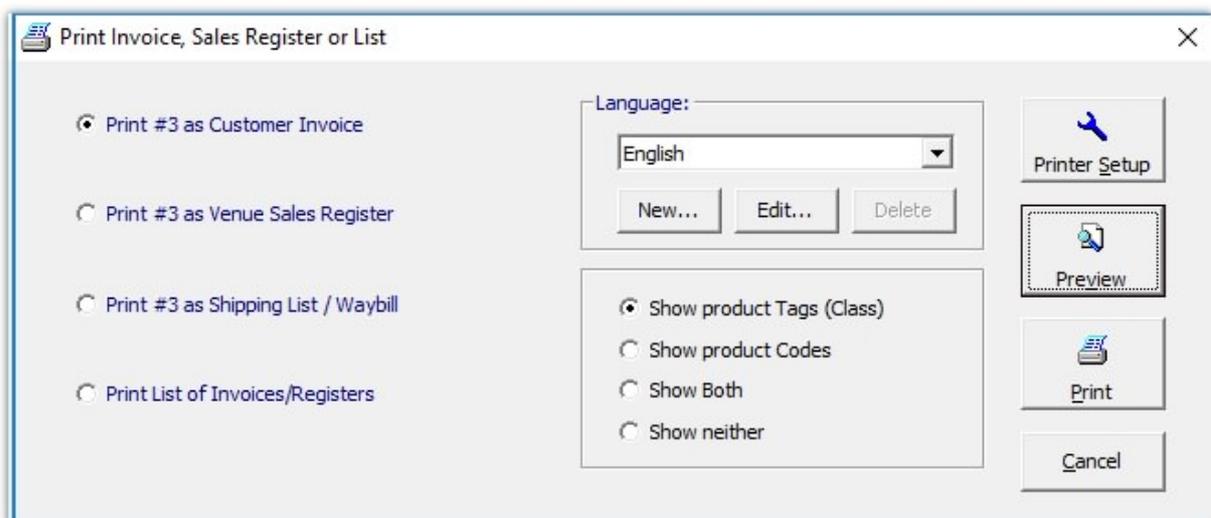
- [Sales Register](#) - Completing the Sales Register form
- [Consignment Sales](#) - How to sell products on consignment
- [Product Locations](#) - Managing consignment product locations

## Printing a Customer Invoice

To print a customer invoice or waybill, open the [Sales Registers/Invoices report](#), select the desired register from the list, and click the **Print** button on the toolbar (or right-click the item and choose **Print Invoice...** from the pop-up menu).



The Print Dialog will open:



You can choose whether to print:

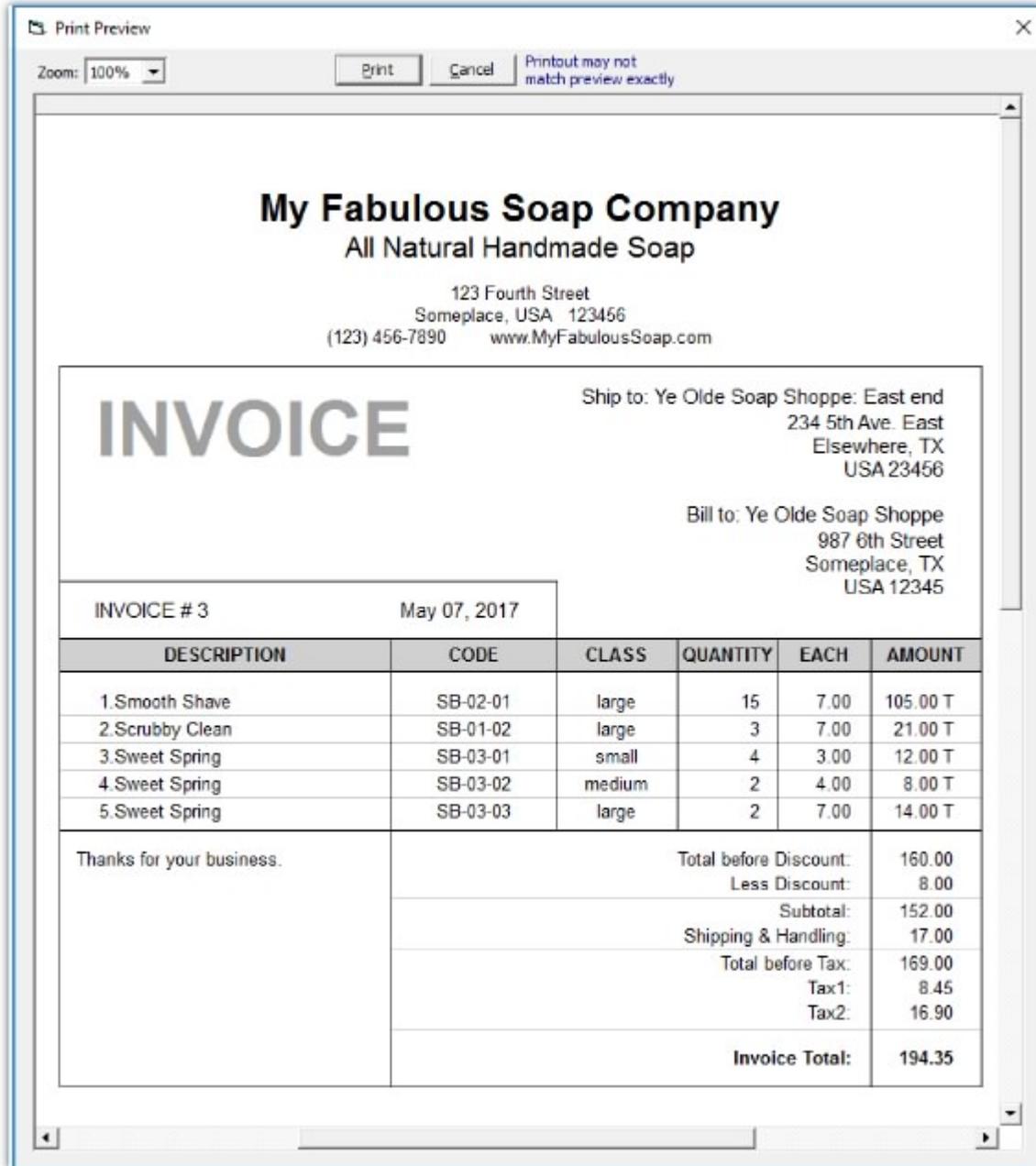
- a customer **invoice**
- a **sales register** format more suited to venue sales (e.g. at a craft show or farmers market).
- a **waybill** (shipping list) that shows the product list without prices
- the displayed **list** of sales registers

If printing a customer invoice or waybill, you can choose whether to show product **Tags**, product **Codes**, both or neither.

You have the option to **preview** before printing. Following is an example of the **Customer Invoice** format. You can choose to use a pre-saved **image** for the header, or just show your company name and address in text (use the [Header](#) button on the toolbar to change the text, or add a custom image with your company logo and address.).

The customer's name and addresses are taken from your [Customer List](#). If you need to change them, cancel the print dialog and click the **Customers** button on the toolbar.

Amounts which are taxable are flagged with **T** and the total tax is shown at the bottom of the invoice. Note that your postage costs plus your handling fee have been consolidated into a single item 'Shipping & Handling' on the printed invoice.



Click the **Print** button to send it to your printer. If you prefer to send invoices electronically (e.g. via email), first click the **Printer Setup** button in the Print Dialog, and set your printer to 'Microsoft Print to PDF'. Then when you click the Print button, the invoice will be saved as a PDF file you can attach to an email.

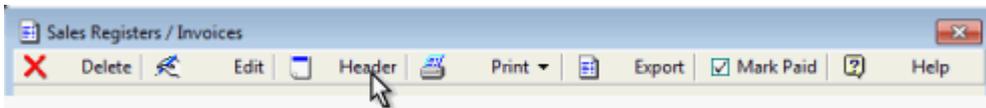
### Language Selection

When you choose the **Export** command, or **Print** command with 'invoice format' option, you can select the desired **language** for the invoice, or add a new language to your database. See [Invoice Language](#) for more information.

## Invoice Header

**Pro** When you **print** an invoice, the header can be either your company name and address in plain **text**, or you can use a pre-saved **image** to make a custom invoice format with your company logo and desired fonts and colors.

To set up your custom invoice header, click the **Header** button on the [Sales Registers/Invoices report](#), or right-click the list item and choose **Change Invoice Header** from the pop-up menu:



This will open the Invoice Header dialog:



## Text Header

To create a custom **text** header, click the **Use Text** button, then edit the title, subtitle and address fields to show your own company name and address. Click **Save** to complete the setup. (Note: When you **export** an invoice, the text header will be used, even if you have specified an image header for printing.)

## Image Header

If you prefer to print invoices with a custom **image** header, you must have first prepared and saved the image with a graphics program. The saved image must be in either **JPEG** or **BMP** format. To avoid distortion, the aspect ratio must be **5 to 1**. For best results, a resolution of 2100 x 420 pixels is recommended. You should save the image file in a safe location.

When your image file is ready, click the **Use Image** button, and then the **Browse for New Image** button. When you have selected your new image file, the image will appear in the preview pane. Click **Save** to complete the setup.

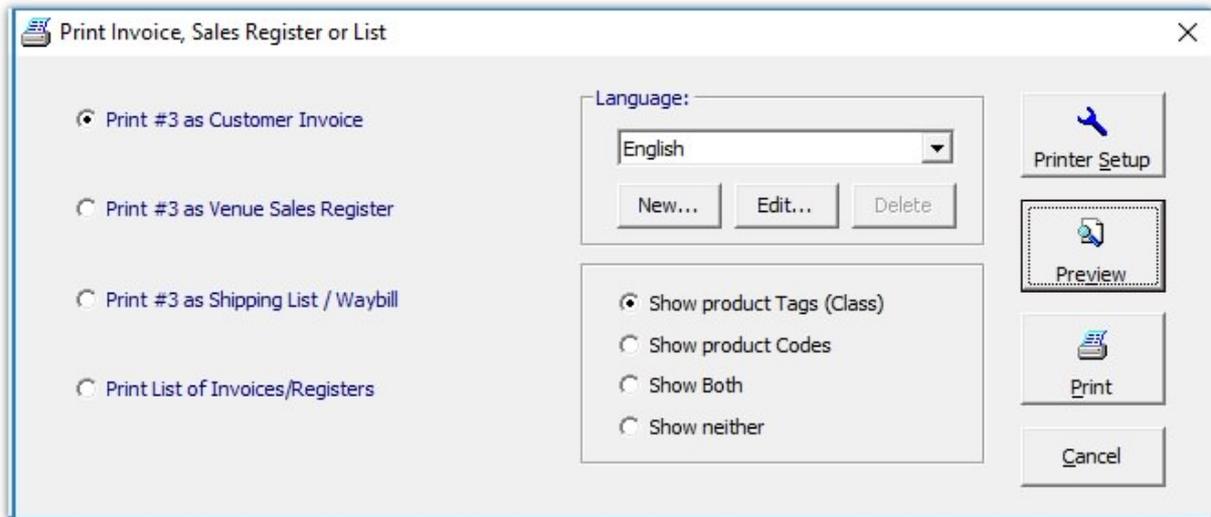
**NOTE:** If you move or rename the file later, SoapMaker will not be able to find it when attempting to print an invoice. Don't forget to make a backup copy of the image file along with your database backup.

## Invoice Language

**Pro** When you **print** or **export** an invoice, you can select the language that will be used for all the terms on the invoice. Although you have to use SoapMaker in English, your customers can receive invoices in whatever language you choose.

Please note that only the Roman character set is supported, so languages that have different character sets cannot be used.

The [Sales Registers/Invoices](#) report **Print** command opens this dialog: (The **Export** dialog is similar)



This example shows the default language 'English' selected.

To select a different language, select one from the drop-down list.



Use the buttons to add a **New** language, **edit** the existing one, or **delete** this language. NOTE: you cannot edit or delete the default 'English' language. If you wish to change any terms in English, add a new language (e.g. 'My English') and edit terms as desired.

If you click **New** or **Edit**, the following window opens, showing all the invoice terms that can be edited. If you are adding a new language, the terms are pre-filled with the default English terms, but you can change any or all of them. Enter the **language name** and click the **Save** button.

## Importing Sales Records

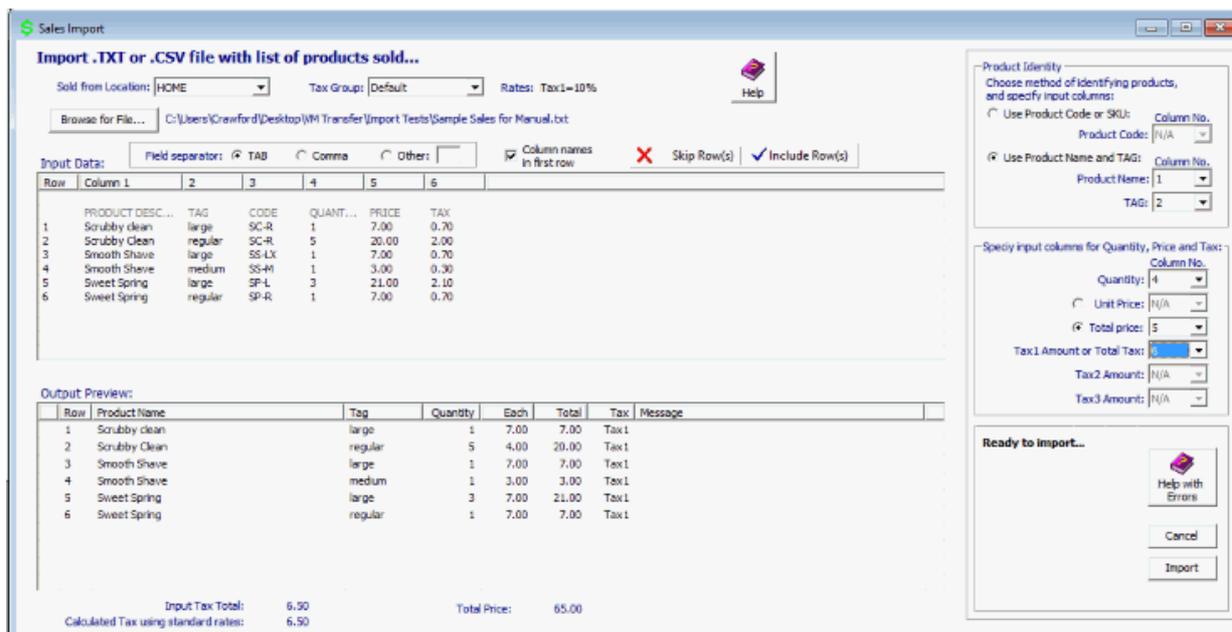
**Pro** If you have a Website **shopping cart** or **Point-of-Sale** system which can export a list of sale transactions, you may be able to **import** them into a SoapMaker [Sales Register](#). You can then verify the data, edit it if needed, and save it like a regular sales register.

To import sales records, they must be in a plain text file with filetype **.TXT** or **.CSV**. There must be a separate line for each sale record, and each record must have the following:

- **Product Identity** - this can be either:
  - a) **Product Code** (as defined in your [Price List](#)), or
  - b) **Product Description** (as defined in [MyProducts](#)). If using this option and you have split product batches into sub-batches, then the sub-batch **Tag** must also be provided
- **Quantity** of product items sold
- Total **Price** for these items

In addition, each record can include **Sales Tax** (VAT). If you collect more than one tax, the individual tax amounts can be provided, or just the total tax for the item. The tax rates for all records must match a particular **Tax Group** as defined in your [Preferences](#).

To start importing, choose **Import Sales...** under the main **Products** menu. This will open the Sales Import form. Once you have opened the desired file to be imported, the form should look something like this:

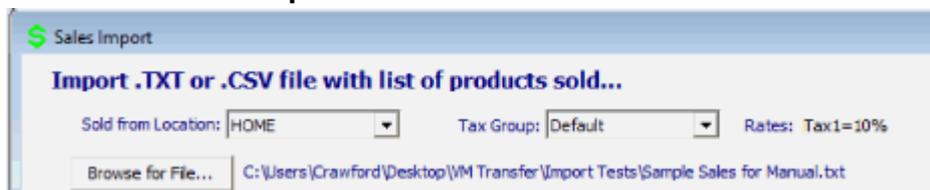


The upper list shows the data you are importing, separated into rows and columns, while the lower list shows how the data will actually be imported into a sales register. You need to define which input column will map to each output column as described below.

### Location and Tax Group

First, if you sell products from more than one inventory location, or have defined more than one tax group, set the Location and Tax Group:

- Select the **location** from which product stock should be taken if it's not the HOME location.
- Select the **Tax Group** which defines the tax rates to be used



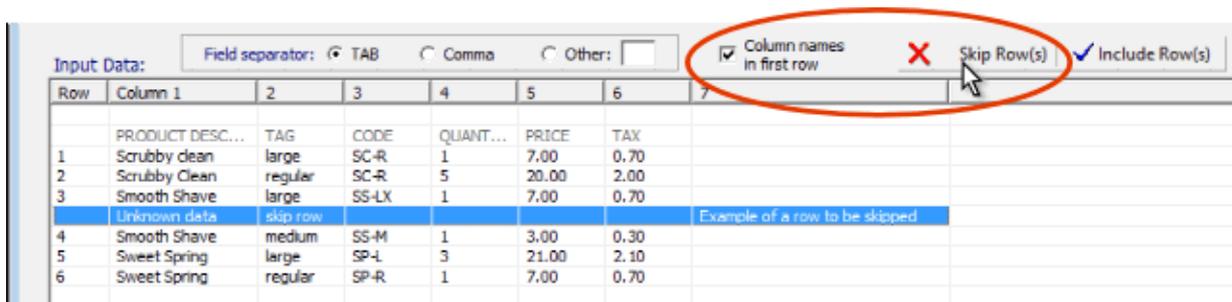
### Input File

Click **Browse for File...** to locate and open the file to be imported. You can choose either CSV files or TXT files. When you click OK, the contents of the selected file will be displayed in the **Input Data** list. You may see a message indicating problems trying to interpret the file - just click OK and then make adjustments as needed to process the file correctly as described below.

Choose the **Field Separator** so you can see the input columns correctly

If the input file contains a header row with column names, check the **Column Names in first row** box so this row will not be imported.

If there are other rows which don't contain sales record (e.g. sub-headings, subtotals, etc.), select them in the Input Data list and click the **Skip Row(s)** button. You can use Shift-Click or Ctrl-Click to select multiple rows at once. In this example, we need to skip the 4th row since it does not contain useful data:



## Define Input Columns

Specify the columns to be used from the input data (there may be several extra columns in the input file which are not needed for importing).

**NOTE:** The input display can handle up to 30 columns of data. If your input file has more columns than this, you will need to delete some of the unnecessary ones in a spreadsheet program before you can import to SoapMaker.

In this example, we have chosen to use the **Product Name** and **Tag** to identify products, and selected input columns 1 for the Name and 2 for the Tag.

If you have defined **Product Codes** for all your products in your SoapMaker [Price List](#), and your import file contains matching codes for all the products sold, you can select the option to **Use Product Code (SKU)** instead of Name and Tag. In this case, SoapMaker will find the matching Product Description and Tag for each item from your product database.

Specify columns for **Quantity** and **Price**. Choose either **Unit Price** or **Total Price**, depending on which is available in your input file. If both are available, just choose one - the other will be automatically calculated.

If your input file contains sales tax amounts, select one or more columns for these. In this example, we have specified one column for **Tax**. If the input shows only one tax column which contains totals of several separate taxes, SoapMaker will attempt to deduce the correct combination of taxes based on the tax rates defined in the chosen tax group.

When the input columns have been correctly specified, SoapMaker will examine each product in your database to check the stock available. The results are shown in the **Output Preview** list.

**Product Identity**  
Choose method of identifying products, and specify input columns:

Use Product Code or SKU: Column No.  
Product Code: N/A

Use Product Name and TAG: Column No.  
Product Name: 1  
TAG: 2

---

**Specify input columns for Quantity, Price and Tax:**

Quantity: 4

Unit Price: N/A

Total price: 5

Tax1 Amount or Total Tax: 6

Tax2 Amount: N/A

Tax3 Amount: N/A

## Check Output Preview

| Row | Product Name  | Tag     | Quantity | Each | Total | Tax  | Message                                     |
|-----|---------------|---------|----------|------|-------|------|---|
| 1   | Scrubby clean | large   | 1        | 7.00 | 7.00  | Tax1 |   |
| 2   | Scrubby Clean | regular | 5        | 4.00 | 20.00 | Tax1 | Insufficient stock for this quantity!       |
| 3   | Smooth Shave  | large   | 1        | 7.00 | 7.00  | Tax1 |   |
| 4   | Smooth Shave  | small   | 1        | 3.00 | 3.00  | Tax1 | No Sub-batch with Tag 'small'!              |
| 5   | Sweet Spring  | large   | 3        | 7.00 | 21.00 | Tax1 |   |
| 6   | Sweet Spring  | regular | 1        | 7.00 | 7.00  | Tax1 | No batches of this product with stock left! |

If there is a problem with any row, it will show an **icon** in the left margin, an **explanation** on the right side of the item, and a summary **message** above the list header. In this example, the Red icons indicate those rows can't be processed because there is no matching product with that Tag in your product stock, or there is no stock remaining for the product.

The Yellow icon indicates a problem, but will not prevent the item from being imported if you choose to go ahead. In this example, there is not enough stock for the sale quantity of that item. You can proceed to import if desired but the stock will then be set to zero in MyProducts.

If you see problems on **every** row, most likely you have not specified the input columns correctly.

### Batch Numbers

Your products listed in [MyProducts](#) are organized by Batch Number, but there is no need to specify batch in the input file. Each sale item will be allocated stock from your inventory starting with the oldest batches that still have stock remaining.

When you proceed with the import, batch numbers will be attached to each item. If there is insufficient stock in a single batch to satisfy an item's quantity, it will be split over two or more batches and you will see multiple items, one for each batch, in the Sales Register after importing.

### Taxes

When the data is imported into a Sales Register, each item must have a tax-rate indicator, rather than an actual tax amount. The tax rates will be deduced from the input tax amount, and shown in the Output Preview. If you see a display like the following, then either you have specified the wrong **column** for the tax amount, or have chosen the wrong **Tax Group**. You could still import the file, but would have to specify the correct Tax Group and tax rates for every item before saving the Sales Register.

Output Preview: Some items have problems and may need editing after import. See MESSAGE column... Click HELP button for assistance

| Row | Product Name  | Tag     | Quantity | Each | Total | Tax | Message                              |
|-----|---------------|---------|----------|------|-------|-----|--------------------------------------|
| ⚠ 1 | Scrubby clean | large   | 1        | 7.00 | 7.00  | *** | Tax amount doesn't match group rate! |
| ⚠ 2 | Scrubby Clean | regular | 5        | 4.00 | 20.00 | *** | Tax amount doesn't match group rate! |
| ⚠ 3 | Smooth Shave  | large   | 1        | 7.00 | 7.00  | *** | Tax amount doesn't match group rate! |
| ⚠ 4 | Smooth Shave  | medium  | 1        | 3.00 | 3.00  | *** | Tax amount doesn't match group rate! |
| ⚠ 5 | Sweet Spring  | large   | 3        | 7.00 | 21.00 | *** | Tax amount doesn't match group rate! |
| ⚠ 6 | Sweet Spring  | regular | 1        | 7.00 | 7.00  | *** | Tax amount doesn't match group rate! |

### Tax Adjustment

If your input data represents separate transactions for each record, the tax amounts for each item were probably rounded. The total tax for the list may then differ slightly from the total based on the derived tax rates. At the bottom of the list, you can see both the tax total from your input tax amounts, and the total of the tax calculated using the derived rates. If there is a difference, you will be able to edit the tax total after importing to a Sales Register so it matches that from your shopping cart or point-of-sale system.

Output Preview:

| Row | Code    | Product Name  | Tag     | Quantity | Price | Tax  | Message |
|-----|---------|---------------|---------|----------|-------|------|---------|
| 1   | SB-01-R | Scrubby Clean | regular | 3        | 20.00 | Tax2 |         |
| 2   | SB-01-S | Scrubby Clean | small   | 1        | 4.00  | Tax2 |         |
| 3   | SB-02-L | Smooth Shave  | large   | 5        | 35.00 | Tax2 |         |
| 4   | SB-02-M | Smooth Shave  | medium  | 1        | 3.00  | Tax1 |         |
| 5   | SB-03-L | Sweet Spring  | large   | 4        | 28.00 | Both |         |
| 6   | SB-03-L | Sweet Spring  | large   | 3        | 21.00 | Tax1 |         |

Input Tax Total: 11.32 11.30 Total Price: 111.00  
 Calculated Tax using standard rates:

### Tax Included in Price

If you sell at a venue and include sales tax in your prices, then don't specify any column for a tax amount. After importing to a Sales Register, you can then specify the tax and choose the option to include it in the total price for each item.

### Ready to Import

In the lower right corner of the form, you can see a status message. If it says 'Ready to import' then you can go ahead and import the data into a SoapMaker [Sales Register](#). If there are any concerns with the data, you will see **red text** as shown in this example - you can either try to fix the problems here, or go ahead with the import and edit things on the Sales Register.

If you are ready, click the **Import** button. This will open a new Sales Register form, and fill it in with the imported data. If you click **Cancel**, the form will close without saving anything.



## Related Topics

[Import Error Messages](#) - List of possible messages and how to deal with them

[Importing from Square](#) - Special considerations if importing from the Square point-of-sale system

[Sales Register](#) - Completing the Sales Register form

[MyProducts](#) - Product stocklists

[Price List](#) - Set up your product codes and prices

[Sales Tax](#) - Setting up and using SoapMaker's Tax features

[Organizing your Products](#) - Tips for naming, organizing and tracking your products

## Import Error Messages

Following is a list of possible errors or problem messages you might see when trying to import sales records:

| Message or Indicator               | Cause and Solution   |
|------------------------------------|--|
| Duplicate columns specified        | You have selected the same column number for different input values. Select unique columns, or N/A if not used.                    |
| No quantity for this item          | Either the wrong column is selected for Quantity, or the input data has no value in this field                                     |
| Quantity is not a number           | Either the wrong column is selected for Quantity, or the input data has non-numeric text in this field                             |
| No price yet for this item         | You have not specified a Price input column, or the field is blank for this item   |
| Price is not a number              | Most likely you have specified the wrong column for the Price field  |
| No Price List entry with this Code | The Product Code for this item does not exist in your Price List. Make sure you have specified the correct column for Product Code |
| No Product Code                    | The Product Code field is blank. Make sure you have specified the correct column for Product Code                                  |
| No Products for this Code          | The Product Code is valid, but there is no stock available   |
| No Products for this Product Name  | The Product Description is valid, but there is no stock available  |
| Missing Product Name               | The Product Description field is blank. Make sure you have specified the correct column for Product Name                           |

|  |  |
|--|--|
| Multiple Sub-batches - need to specify Tag   | The products with this Product Description have been split into sub-batches; you will need to specify the Tag to identify which sub-batch. If this is not available in your input file, you can go ahead with the import and choose the Tag on the Sales Register form.                                    |
| No Sub-batch with Tag 'XXX'  | The sub-batch Tag from the input file is not valid. Make sure you have specified the correct column for Tags.  |
| No products in selected location   | You have specified a location other than HOME for the sales, but there is no product stock there for this item   |
| No batches of this product with stock left   | The Product Description and Tag are valid, but there is no stock available   |
| Insufficient stock for this quantity   | There is some stock available, but not enough to satisfy this quantity. If your input data is accurate, and you have specified columns correctly, then maybe you need to edit your product stock in MyProducts. Or perhaps you forgot to record new batches with that recipe so your stock is out-of-date. |
| Cannot have Tax2 without Tax1, or Tax3 without Tax2<br>or<br>The selected Tax Group has 3 tax rates, but you have not specified an input column for the third rate | You can specify either one column for tax amount, or a column for each rate defined in the selected Tax Group. If the group defines 3 rates, you cannot specify only two columns.  |
| Tax(n) is not a number   | The tax amount in this input column is non-numeric. Make sure you have specified the correct column for tax amount   |
| Tax amount doesn't match either or both group rates (or similar message)   | SoapMaker attempts to derive the tax rate, or combination of rates based on the tax amount and the rates defined by the selected Tax Group. If there is no match, make sure you have specified the correct Tax Group, and the correct columns for tax amounts  |

## Importing from Square

**Pro** If you use **Square** for point-of-sale in a store or at sales venues, you can interface it with SoapMaker to import daily **sales records** and adjust your **product inventory**.

### Setup

The first step is to make sure your product names and/or product codes are consistent between Square and SoapMaker. You can either:

- A) adjust SoapMaker to match your Square names and codes, or
- B) you can export your product names, codes and prices from SoapMaker to Square (see the topic [Exporting Price List](#)).

The following fields should be identical in the SoapMaker and Square databases:

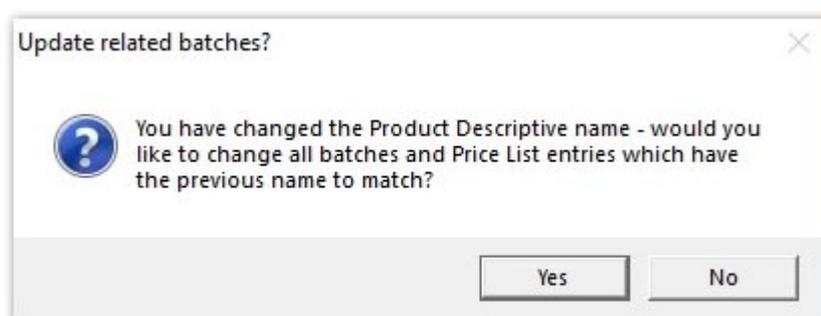
| SoapMaker           | Square    | Comment                          |
|---------------------|-----------|----------------------------------|
| Product Description | Item Name | Max. 50 characters in SoapMaker. |

| SoapMaker  | Square         | Comment   |
|--|----------------|---|
| (set in <a href="#">MyProducts</a> )                   |                |   |
| Product ID Tag<br>(set in <a href="#">MyProducts</a> ) | Variation Name | Max. 10 characters in SoapMaker.<br>Only needed if you have different sizes or shapes of the same product (e.g. regular, large) |
| Product Code<br>(set in <a href="#">Price List</a> )   | SKU            | Max. 50 characters in SoapMaker.  |

### Option A - Adjusting SoapMaker to match Square

If you already have names in Square that you want to keep, you can adjust SoapMaker to match:

1. Select a batch in [MyProducts](#) and click the **Edit** button.
2. Enter the **Product Description** that matches the name used in Square and click **Save**.
3. When asked whether to update related batches and price list entries to match, click **YES**



4. If your inventory contains different sizes or other variations of the same product, you will also need to make sure that the Square **Product Variations** field matches the SoapMaker product **Tags**.
5. If you use **SKU** (stock keeping unit) **codes** in Square, make sure the SoapMaker **Product Codes** in the [Price List](#) match.
6. If you have more **price categories** than just retail and wholesale, you can add them in [MyPreferences](#) on the **Production and Taxes** tab. For example, if you use Square in multiple locations with different prices, you can add a price category for each location.
7. With the [Price List](#) open, choose a **price category**, then enter prices for each product. Note that if you use common Tags for similar sized products with different descriptions, you can use the **Copy Prices** button to copy the same price to all products with the same Tag.
8. Repeat Step 7 for each price category you use.

### Option B - Adjusting Square to match SoapMaker using your SoapMaker Price List

If you don't already have your products and prices defined in Square, you can export them from SoapMaker to a specially formatted file that can then be imported into Square. For instructions, please see the topic [Exporting Price List](#).

## Importing Sales to SoapMaker

When you have completed the Setup steps, you can import your sales results to SoapMaker periodically to update your product inventory and capture revenue and tax information as described in the [Importing Sales Records](#) topic.

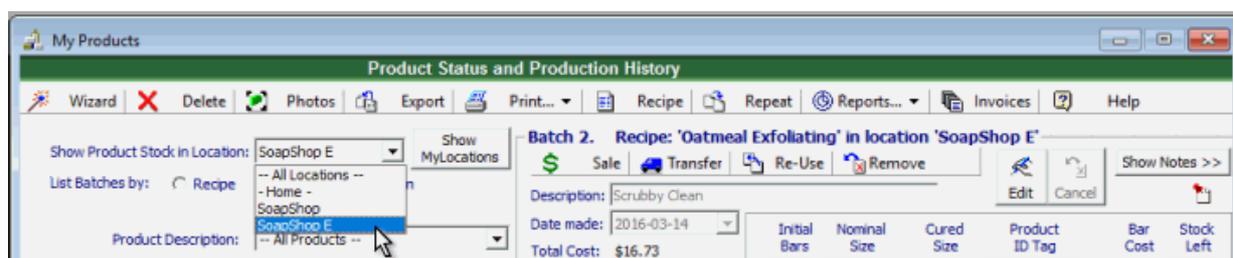
## Consignment sales

**Pro** When you place products on consignment with a customer, those products are still part of your inventory until they are actually sold. SoapMaker provides a way to manage this by defining **product**

**locations** that are linked with customer branches, and recording **transfers** of products to those locations.

Follow these steps for consignments to a particular customer:

1. To prepare for consignment sales, first make sure you have the target customer branch defined in your [Customer List...](#)
2. Select the products to be transferred in MyProducts, and perform the transfer (See [Transfer Products to Location...](#)). If you have not already defined the destination location, you can do this during the transfer process.
3. The [Product Transfers](#) report will open to show the new transfer register. From there you can print the register for your own records, and print a [consignment invoice](#) to include with the shipment to your customer.
4. MyProducts will now show the stock added to the destination location, and removed from the HOME location.



## Consignment Stocklist

From MyProducts, you can print a stocklist for a particular location, showing the current status of all products transferred to that location.

First set up the batch list display as follows:

1. Select the **location**
2. Check **List Batches by Product Description** rather than by Recipe
3. If you sell more than one size of each product, check **Show Sub-batches**
4. Set the **Date Range** to This Year or All dates.

Select **Print/Consignment Stock** on the MyProducts main toolbar. The printout does not contain any cost information, and can be shared with your customer.

## Selling Consignment Products

When products are sold by the consignment customer, select the **Location** in MyProducts to match that customer's branch, and then record the sale in the normal way and print an invoice as explained in [Recording Product Sales...](#)

Note: For consignment sales, generally the store is responsible for collecting sales tax and accounting for it. If this is the case for your area, then you should not include tax on your invoice to the store.

If the store charges you a consignment commission or fee, this should be recorded as a purchase, using the [New Supply Purchase or Expense form](#) (on the **Other Expense** tab), including any tax on this expense. It will show on the [Tax and Income Summary report](#).

## Product Returns

If **unsold** products are returned from consignment and are still in good condition, simply [transfer](#) them back to your HOME location stock.

If the products are no longer suitable for sale, you can write them off or give them away... See the topic [Removing Product Stock](#).

## Related Topics:

[Transfer Products to Location](#)

[Product Transfers report](#)

[Customer List](#)

[MyLocations](#)

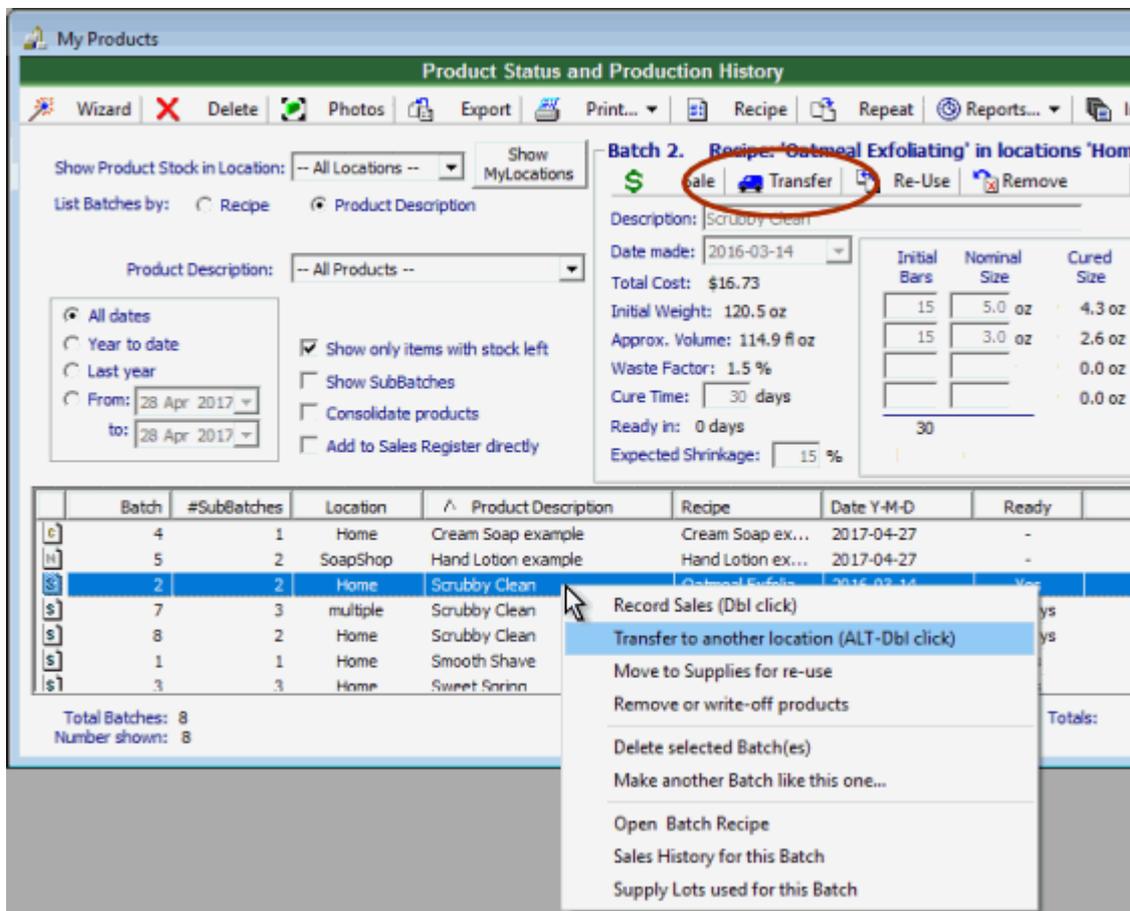
[MyProducts](#)

## Transfer Products to Location

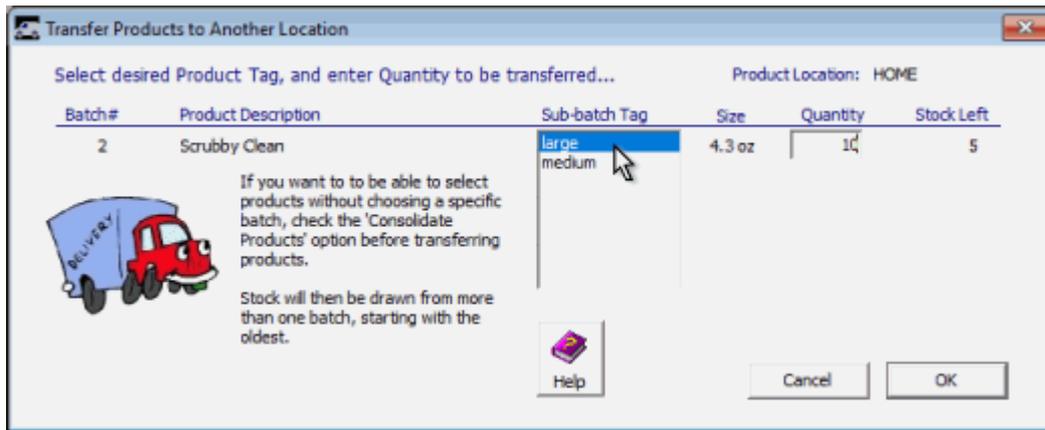
**Pro** If you sell on consignment, or store products in separate warehouses, you can easily record the transfer of products between locations. If you haven't already defined the destination location, you can do this during the transfer process.

Select the product batch from which you want to transfer some products, and then either:

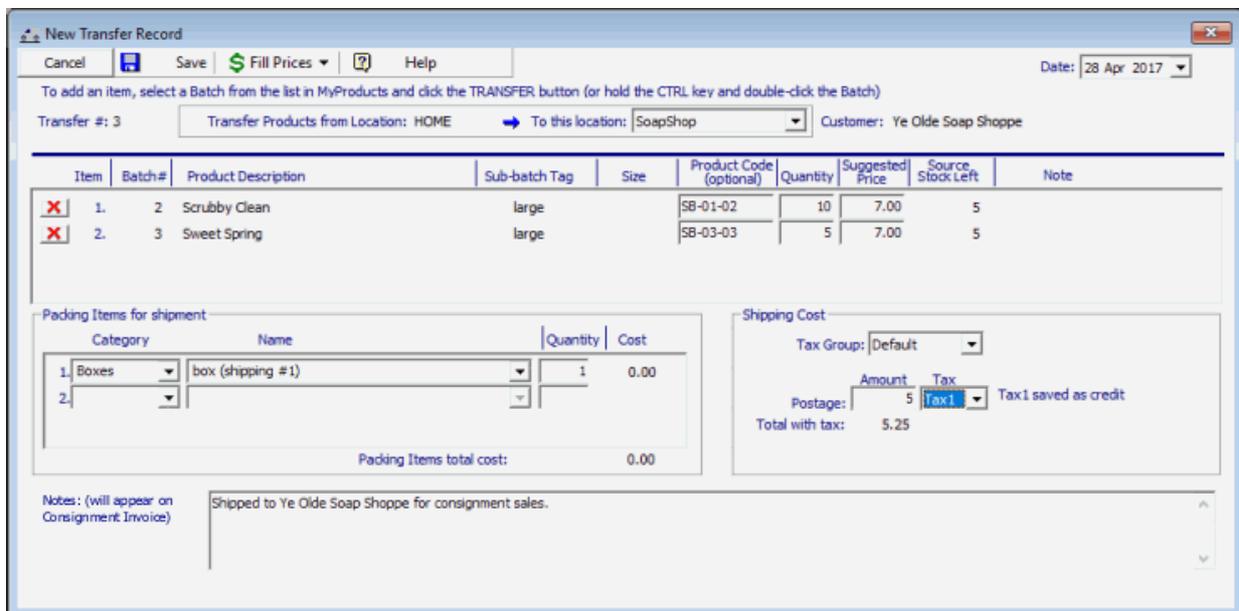
- Click the **Transfer** button on the toolbar, or
- **Right-click** the item in the batch list and choose **Transfer...** from the pop-up menu, or
- Hold the ALT key and **double-click** the batch item.



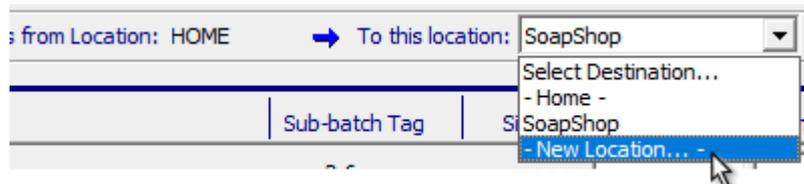
The **Transfer Products** dialog will open. If the batch has more than one sub-batch, select the desired **Tag** and enter the quantity to be transferred.



Click the **OK** button or press **Enter** on the keyboard. This will open the **New Transfer Register** if it's not already open, and will add the items you have selected. If you are transferring several different products at the same time, leave the New Transfer Register open, and repeat the process in **MyProducts** to add more items.



When you have added all the products to be transferred, select the destination **Location** from the list, or choose **New Location** to define a new one.



If you are sending these products to a consignment customer, you can add product codes and suggested prices by using **Fill Prices** on the toolbar - this will fill in the codes and prices from your [Price List](#).

In the **Packing Items** area, you can enter any packing materials from your Packaging stock in **MySupplies**. This will adjust your inventory, and add the costs to your total business costs in the [Tax and Income Summary](#) report.

In the **Shipping Cost** area, enter any postage or freight charges, and tax on shipping. These will also be added to the totals in the [Tax and Income Summary](#) report.

Add any notes you desire - these will appear on the **Consignment Invoice** sent to your customer.

When you have completed the Transfer Register, click the **Save** button on the toolbar. Your product stock will be adjusted to reflect the transfers and a new record will be added to the [Product Transfers Report](#). From there you can print an invoice to send to your consignment customer.

## Related Topics:

[MyProducts](#) - Your product inventory management center

[MyLocations](#) - Lists and allows management of your product locations, including consignment customers

[Price List](#) - Set up your prices and product codes for all your products.

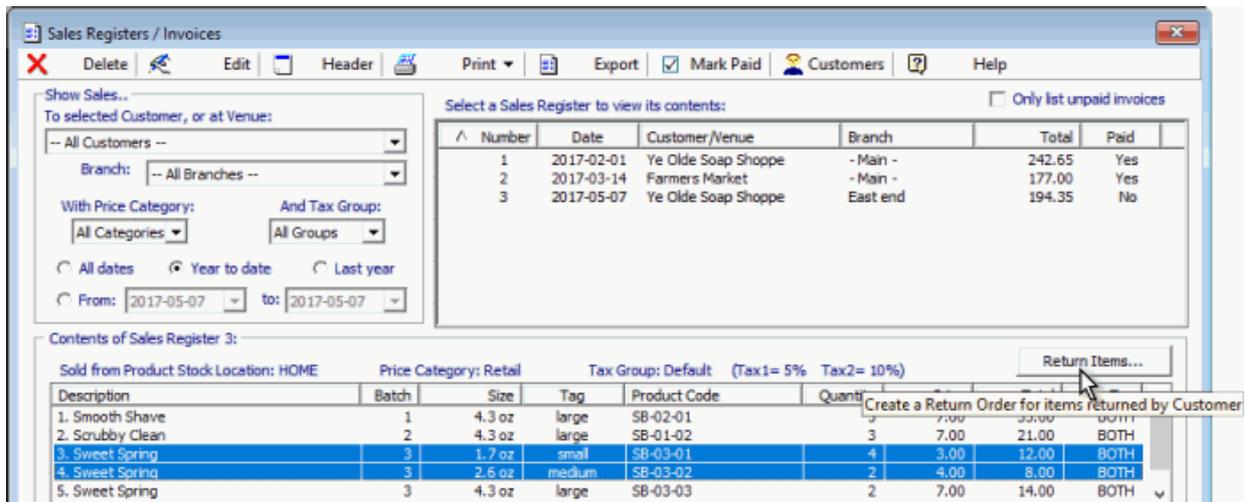
[Product Transfers Report](#) - Lists all transfers between locations

[Tax and Income Summary report](#) - shows annual income, costs and taxes

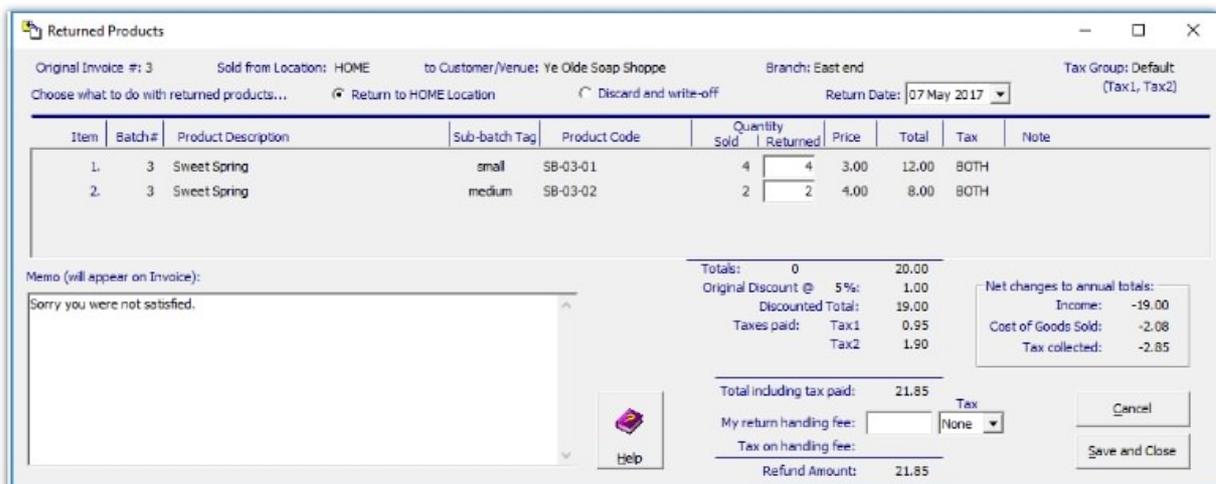
## Product Returns

**Pro** If your customer returns some of your products, follow these steps to record the fact...

1. Open the [Sales Registers/Invoices report](#) and select the register which included the products being returned.
2. In the list of contents, select all the items affected, and then click the **Return Items** button. Use shift-click to select a block of items, or Ctrl-click to select multiple individual items.



1. The **Returned Products** register will open, listing all the selected products. Initially the **quantity** returned for each will be set to the total quantity from the original sale, but you can edit the quantity here if only some of the products are being returned.
2. If the returned products are in good condition, select the **Return to HOME Location** option. If not, select **Discard and write-off**.



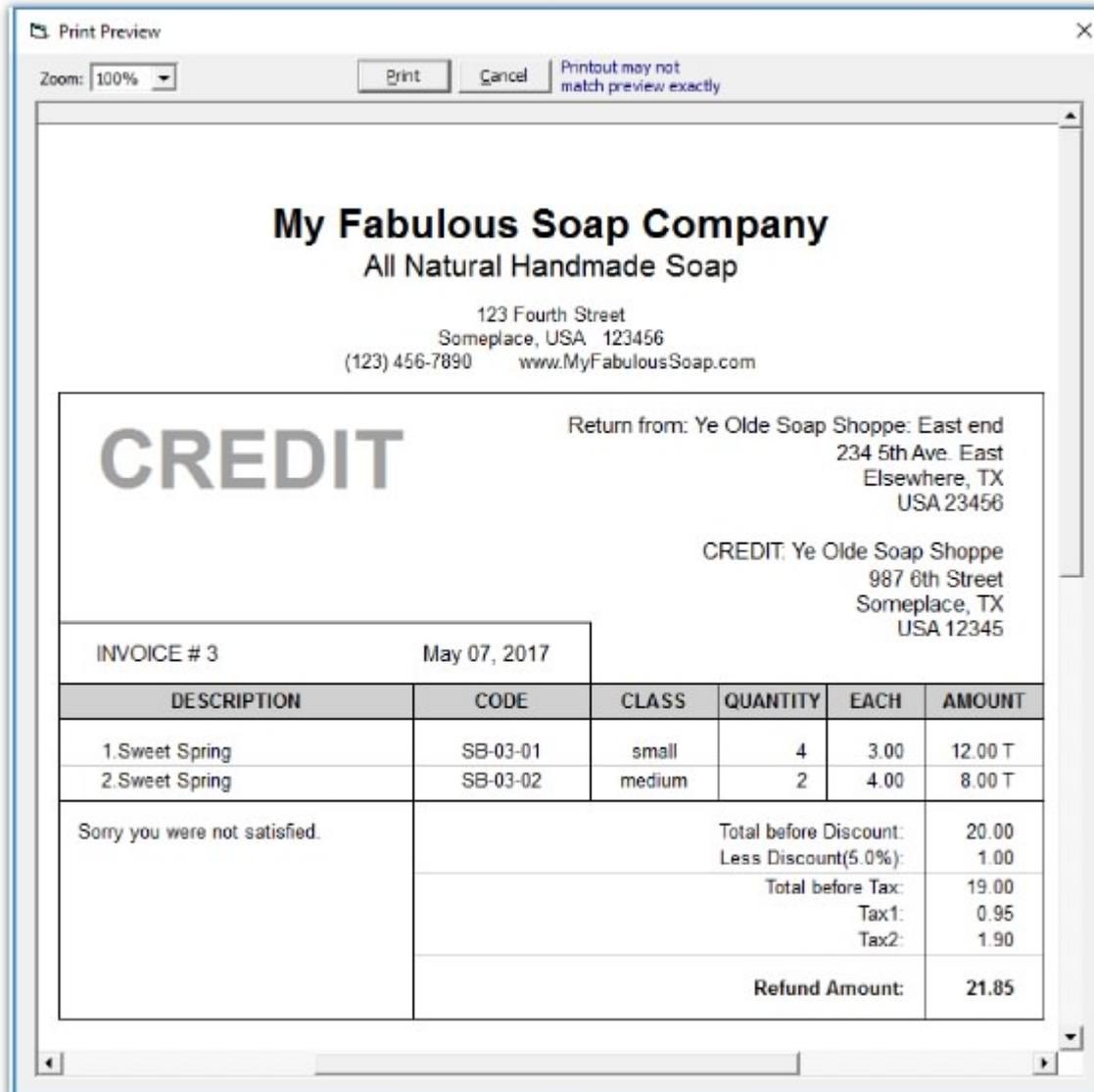
1. If desired, you can charge a **return handling fee**. You can also enter a **memo** that will appear on the return invoice you send to the customer.
  2. When ready, click the **Save and Close** button.
- A new 'return register' will be created in the [Sales Registers/Invoices report](#).

If you chose the option to return products to stock, your products inventory in [MyProducts](#) will be adjusted to show the returns.

**NOTE:** If products are being returned to stock in a consignment customer location rather than the HOME location, you will have to transfer them from HOME to the customer location again as described in the topic [Transfer Products to Location...](#)

### Credit Statement

From the [Sales Registers/Invoices report](#), you can print a **credit statement** to send to your customer, confirming the return and showing the refund.



### Related Topics

[Sales Registers/Invoices report](#)

[MyProducts](#)

[Printing a Customer Invoice](#)

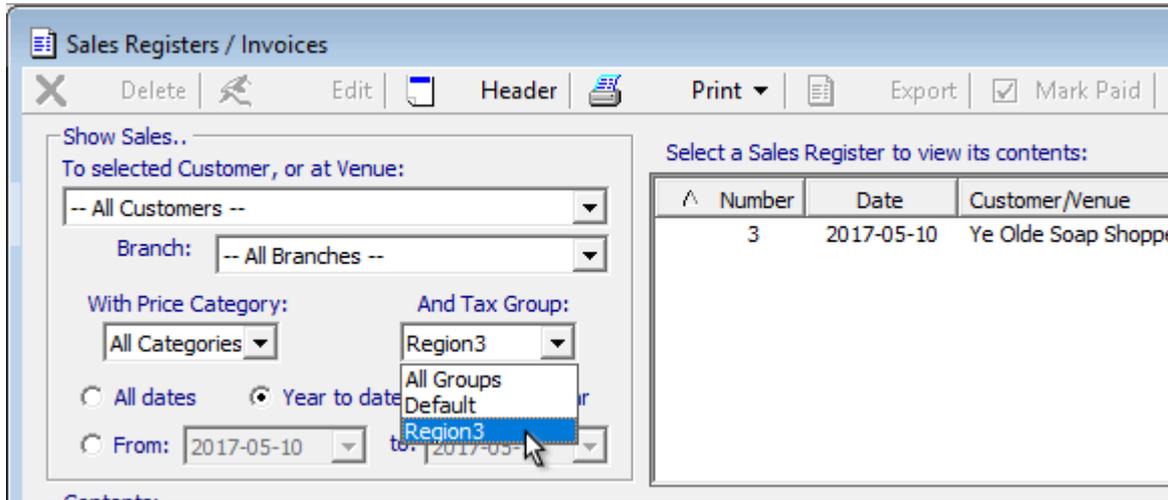
### Viewing Sales by Region

**Pro** Use the **Tax Groups** feature to enable filtering the [Sales Register/Invoices Report](#) to show only sales to a particular **region** (e.g. state or city).

You can define a unique Tax Group for each region in [MyPreferences](#). Even if you don't need to collect tax when selling to a region, you can define a Tax Group with zero tax.

In your [Customer List](#), you can specify a default Tax Group for each branch. Then when you record a sale to that customer branch, the Tax Group will automatically be selected.

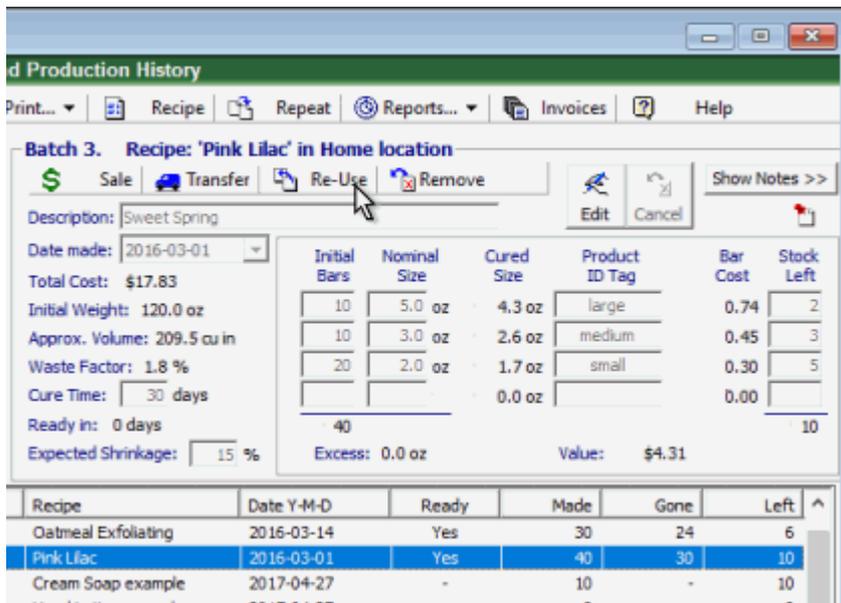
In the [Sales Register/Invoices Report](#) you can select a particular Tax Group to filter the list of sales registers shown...



## Reusing Products as Ingredients

**Pro** There may be times when you want to use products you have already made as part of new products. Examples include:

- Pre-making **soap base** to use in future recipes
- **Imbedding** pieces of finished soap in new soap batches
- Using already made products to create packages such as **gift sets**
- **Re-batching** soap that did not turn out the way you wanted it  
(Note: If desired, you can use this method to re-batch soap that didn't turn out, or any excess left over after cutting bars or pouring portions.)

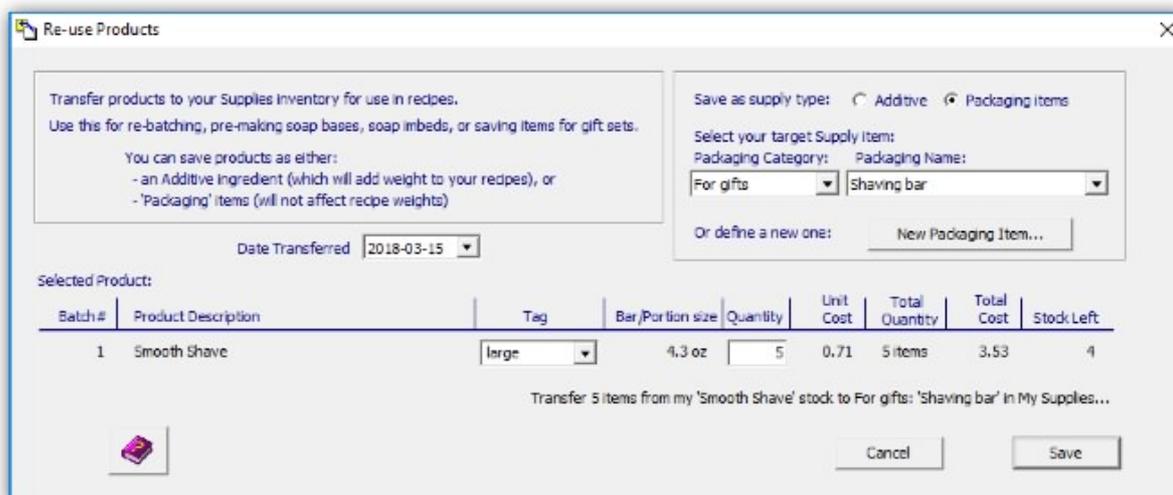


To use the **Re-Use Products** feature: select a batch in MyProducts, and then click the **Re-Use** button on the toolbar, or right-click and choose **Move to Supplies for re-use** from the pop-up menu. This will open the Re-use Products dialog as shown below.

You can choose to transfer some or all of the selected product batch into your supplies inventory as either an **Additive**, or as **Packaging items**, that can be used in future recipes.

You can also reuse any **excess** left over after making the specified bars/portions and sizes.

- Choose **Additive** if the products will be used as an ingredient whose weight will affect the total recipe weight (e.g. if you want to use it as a soap-base). Note that the INCI name for this additive will be blank, but when you include this new ingredient in a recipe, the recipe printout will show all the ingredients and INCI names from the recipe that was used to make this reused product batch.
- Choose **Packaging items** if the products will be part of a set of products like a gift basket. In this case, their weight will not matter to the final 'recipe'.



**Important:** Avoid using the same supply name for reused products made with different recipes - this will make the [Reused Products report](#) confusing. It is recommended to create a unique supply name for reused products from each recipe.

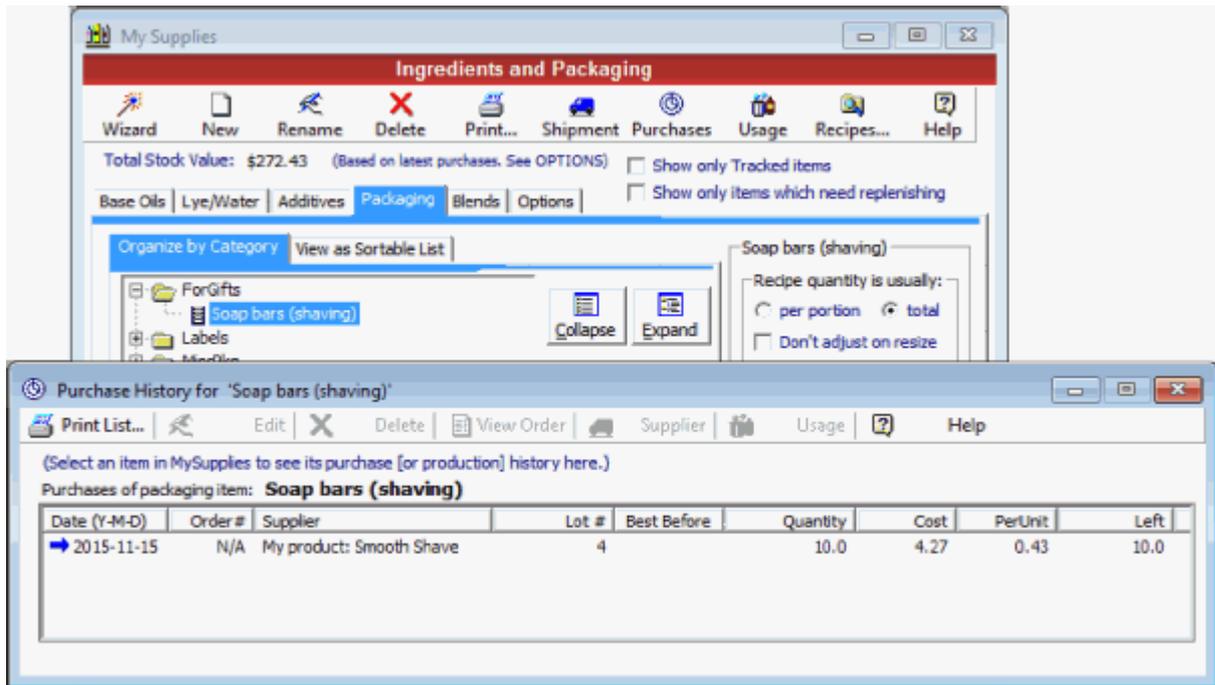
If you have not already defined a suitable supply item, you can do it here by clicking the **New Additive/New Packaging Item** button. You will also be able to define a new **Category** if desired. Note that if you are defining a new Additive ingredient, the **specific gravity** will be calculated for you based on the product weight and volume (after shrinkage).

If the batch was split into multiple sizes, you must select the desired **Tag**. Then enter the **quantity** to be transferred. You will see how much will be left in your product stock after the transfer. The cost of the new supply item will be your product cost which was recorded when you made the batch.

The **Date Transferred** defaults to the current date, but you can select a different date if desired.

When ready, click the **Save** button...

The product stock is reduced by the quantity entered, and a 'purchase record' is created for the transferred products as shown in this example:



There is no order number, and the **Supplier** shows 'My products: <product name>'. The **Lot number** is your product **Batch number**.

Products transferred to Supplies this way can now be used in recipes to create new products.

To see a history of products you have reused, see the [Reused Products Report](#) under the main **Reports** menu.

### Further Topics:

[Imbeds](#): Including pieces of already made soap into new soap recipes

[Soap bases and re-batching](#): Using pre-made soap as base for new recipe

[Gift sets](#): Creating packages of your products and other purchased items

### Imbeds

If you like to cut up already-made bars of soap and imbed the pieces in new bars, follow these steps:

1. Transfer bars of your already made soap from your products into your supplies stock (see the topic [Re-using Products as Ingredients](#)). Save them as **Additive** ingredients because they will add weight to your new product. If you transfer several bars at once, their total weight will become the stock quantity (i.e. they will lose their identity as individual bars).
2. Create a new solid soap recipe, and include the new imbed additive ingredient with the estimated weight of the pieces you plan to imbed.

When you record a batch with this recipe, your supply stock of the imbed additive will be reduced by the weight specified, and the cost of the product will include your original cost of making the imbedded product.

### Soap bases and re-batching

#### Melt and Pour Base

To pre-make your own soap base for **melt and pour** soaps, follow these steps:

1. Create a solid-soap recipe for the soap base. Specify a single large bar, since you won't be cutting into small bars.
2. Make and record a batch of the soap base recipe.
3. Transfer the entire block of soap base from your products into your supplies stock (see the topic [Re-](#)

[using Products as Ingredients](#)). Save the block as an **Additive** ingredient. The block weight will become the stock quantity.

4. Create a new **non-soap** recipe for your melt and pour soap (because lye calculation is not needed). Include the desired quantity of the soap base as an additive ingredient.

### Liquid Soap Base

To pre-make your own soap base for **Liquid** soaps, follow these steps:

1. Create a liquid-soap recipe for the soap base. Specify a single large portion, since you won't be dividing it up.
2. Make and record a batch of the soap base recipe.
3. Transfer the entire quantity of soap base from your products into your supplies stock (see the topic [Re-using Products as Ingredients](#)). Save this as an **Additive** ingredient.
4. Create a new recipe for your final liquid soap product. Include the desired quantity of the soap base as an additive ingredient.

When you record a batch with the final recipe, your supply stock of the soap base additive will be reduced by the weight specified, and the cost of the product will include your original cost of making the base.

Note: If desired, you can use the above methods to re-batch soap that didn't turn out. But if you just need to rebatch a few scraps from earlier batches rather than entire blocks, see the topic [Re-batching leftovers](#).

### Gift sets

You can create **gift sets** as products, using other products you have already made (i.e. soap bars, lotion jars, bath bombs, etc), as well as purchased items (soap dish, facecloth, basket, etc.). To do this, you will need a 'recipe' for the gift set with all the 'ingredients' defined in your Supplies list.

1. Transfer some of your already made products into your supplies stock (see the topic [Re-using Products as Ingredients](#)). Save them as **Packaging** items since the weight of your gift set does not matter.
2. Add any purchased items to your supplies as Packaging items, and record the purchase to establish stock quantities and costs.
3. Create a new **non-soap** recipe for the gift set, and include all the 'packaging' items - your own products and purchased items, as well as packaging such as basket, wrapping, ribbon, etc. You can also include Additive items from your stock such as essential oils (along with their bottles as Packaging items). Set the 'number of portions' (on the Options page) to match the number of gift sets you intend to make at one time.
4. When you make actual gift sets, record this by using the **Make Batch** command with the gift set recipe.

When you record a batch with this gift set recipe, your supply stock of all the included items will be reduced by the quantity specified, and the cost of each gift set will include your original cost of making the included products as well as the purchased items and packaging.

After using the Make Batch command, the gift sets will appear as a batch record in MyProducts.

You can record sales of your gift set products like any other products - see the topic [Recording Product Sales...](#)

If you give away gift sets for **advertising** purposes, instead of recording sales, use the [Remove Stock](#) feature to remove the gift set from your products stock and record it as an advertising expense.

### Related Topic:

[Advertising Samples](#) - How to record product gifts used for advertising

## Removing Stock

**Pro** If you need to remove some stock from your **ingredients** or **products**, SoapMaker provides a method to do this and account for the lost stock.

You can select one of the following purposes for the removal:

- **Advertising** - e.g. free samples
- **Donation** - e.g. products you give to a charity
- **Personal use** - supplies or products you take from stock for your own use, or gifts to friends or family
- **Write-off** - supplies which have passed their expiry date, or products from failed batches
- **Other** - any other reason - you can enter a comment to explain

The total value of items under each purpose is shown on the [Tax and Income Summary](#) report.

For instructions, see the following topics:

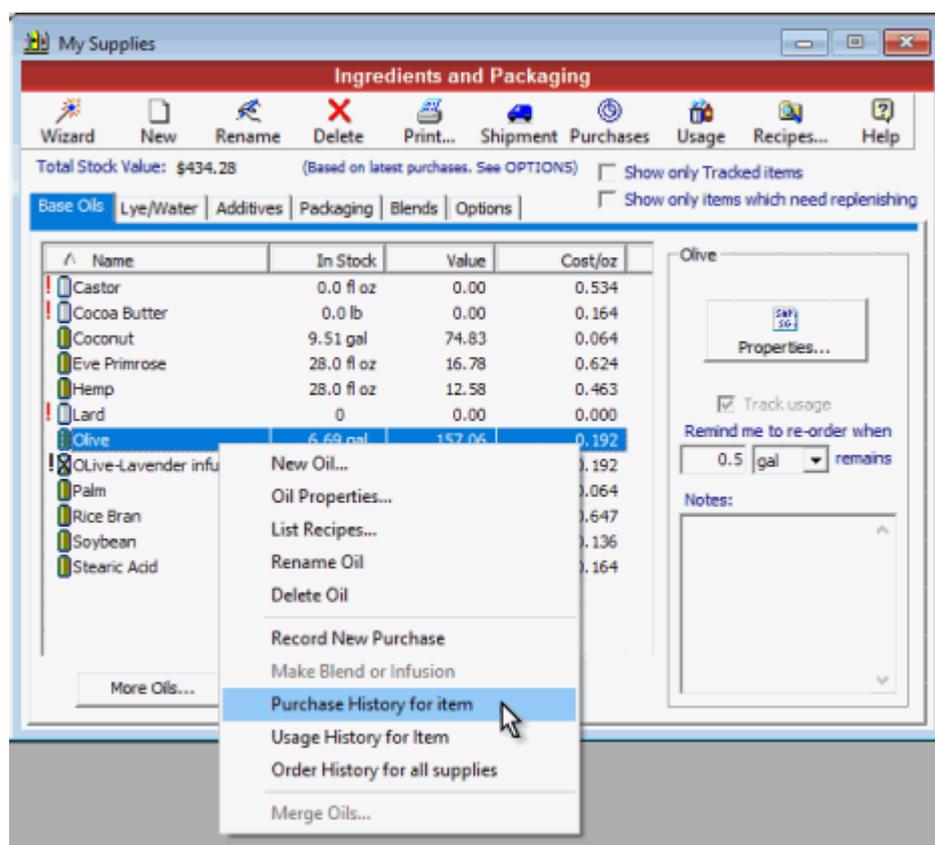
### [Removing Supply Stock](#)

### [Removing Product Stock](#)

For a history of stock removals, see the [Stock Removed report](#). From there, you can **restore** stock if you removed it in error.

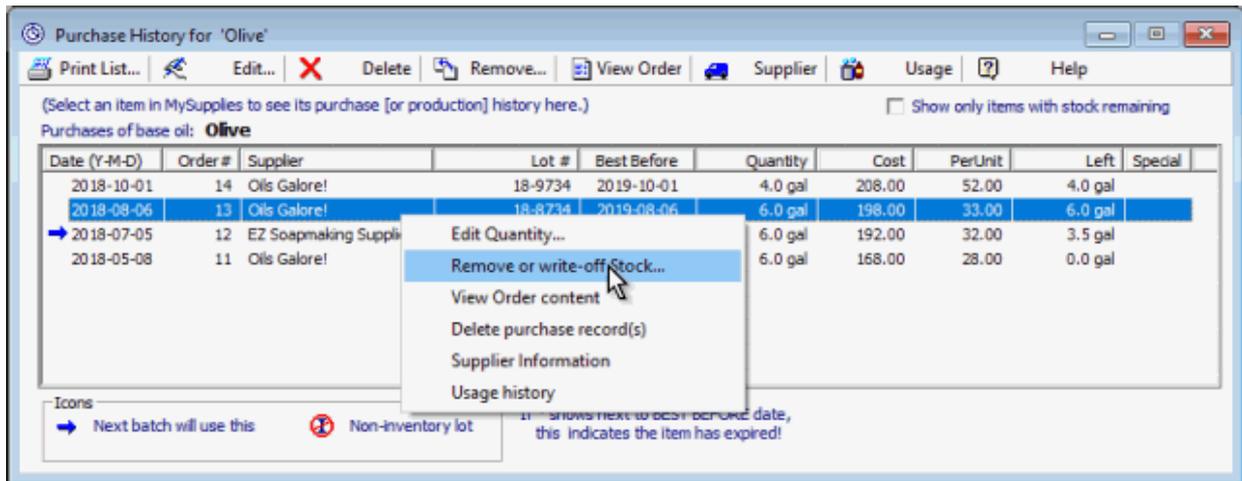
## Removing Supply Stock

**Pro** If you need to remove stock from your inventory of ingredients or packaging items, you need to select a specific purchased **lot**. In MySupplies, select the ingredient or packaging item and then click the **History** button on the toolbar, or right-click the item and choose **Purchase History for item** from the pop-up menu...



This will open the **Purchase History report** for that item. Select the particular lot from which you want to remove stock, and then either:

- double-click the item, or
- click the **Remove** button on the toolbar, or
- right-click the item and choose **Remove or write-off Stock** from the pop-up menu



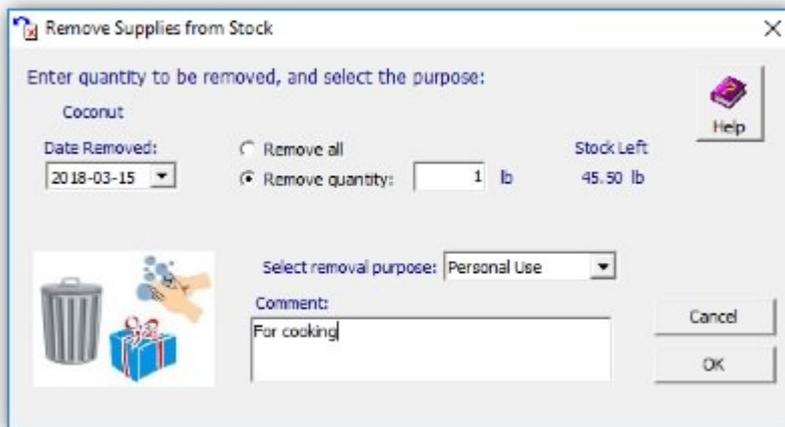
The **Remove Supplies from Stock** dialog will open. You can choose to **remove all** the remaining stock, or enter the **quantity** you wish to remove.

Choose the **purpose** from the drop-down list:

- Advertising - used for free samples to attract sales
- Donation - given to a charitable organization
- Personal use - for your own use, or gift to friends or family
- Write-off - discarded due to old stock
- Other - any other purpose you want to track

The cost of supplies removed with purpose **Write-off** will be included in a line item in the main **Costs** area of the [Tax and Income Summary report](#). Other purposes will be included in the **Removed Stock Costs** area of the report.

If desired, you can enter a comment to explain this action. The Date Removed will default to the current date, but you can select a different date if desired. The **Stock Left** amount shows what will remain after you save your change.



Click **OK** to complete the action. Your stock will be adjusted to reflect the removal, and a new record will be added to the [Stock Removed report](#).

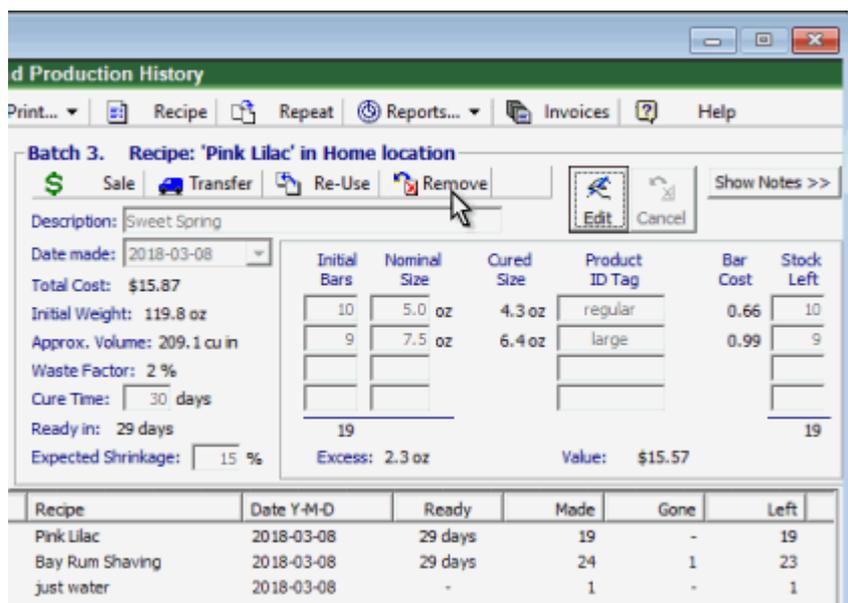
## Related Topics

[Correcting Supply Stock](#) - Making corrections to match your actual inventory

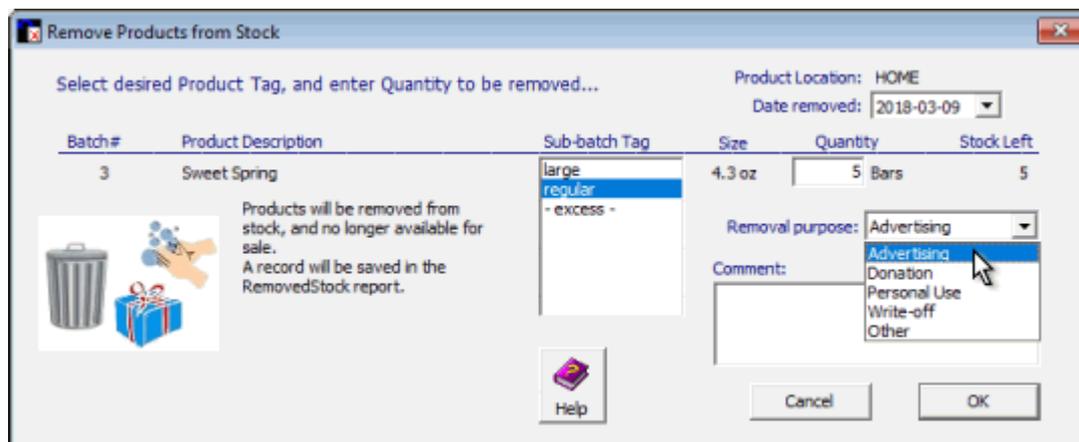
[Supplies Audit](#) - Periodic check and correction of supply stocks

## Removing Product Stock

**Pro** If you need to remove stock from your products inventory, select a specific **batch** in [MyProducts...](#)



With a batch selected, click the **Remove** button, or right-click the batch and choose **Remove or write-off Products** from the pop-up menu. This will open the **Remove Products from Stock** dialog...



If the batch has multiple sub-batches, select the desired **Tag**. Enter the **quantity** to be removed.

Or if the batch has **excess** material not included in any products and you want to remove this, select - **excess-**. You can use this to account for the cost of scraps left after cutting soap bars or pouring liquid products into bottles. (Note: you can also **reuse** the excess for rebatching if preferred - see the topic [Reusing Products as Ingredients](#) for more information.)

Choose the **purpose** from the drop-down list:

- Advertising - used for free samples to attract sales
- Donation - given to a charitable organization
- Personal use - for your own use, or gift to friends or family
- Write-off - discarded due to failed batch or old stock
- Other - any other purpose you want to track

The cost of products removed with purpose **Write-off** will be included in a line item in the main **Costs** area of the [Tax and Income Summary report](#). Other purposes will be included in the **Removed Stock Costs** area of the report.

If desired, you can enter a **comment** to explain this action.

The **Date Removed** will default to the current date, but you can select a different date if desired.

Click **OK** to complete the action. Your stock will be adjusted to reflect the removal, and a new record will be added to the [Stock Removed report](#).

## Correcting Stock Quantities

**Pro** From time to time, you may need to adjust your SoapMaker stock quantities of supplies or products to reflect what is actually in stock. You can do this by simply editing the quantity of a particular supply lot or product batch. But if you need to dispose of stock, or use it for something not related to your business, SoapMake provides a way to do this and account for the stock removal.

To remove stock and account for the change, see the topic [Removing Stock...](#)

If the **quantity in stock** displayed for one of your supplies or products is incorrect, and you don't need to account for lost stock, you can easily correct it as described in these topics:

[Correcting a supply stock quantity...](#)

[Correcting a product stock quantity...](#)

For an annual audit of your stock, see the step-by-step instructions in this topic: [Periodic Stock Audits...](#)

## Correcting Supply stock

**Pro** If MySupplies shows an incorrect quantity in stock for a supply item, you can correct it using one of the following methods:

### Edit the Purchase Order

If you made an error when entering the item in a supply purchase order, you can edit the order as described in the topic [Supply Orders report](#).

Or...

### Edit the Purchase History record

To simply correct the quantity remaining of a single item:

1. In MySupplies, select the item whose **In Stock** quantity is incorrect, and click **Purchases** on the toolbar. This will open the [Purchase History](#) report. All purchase records of the selected item are listed here, with the most recent at the top. The blue arrow indicates the oldest purchase with stock still remaining

| Date (Y-M-D) | Order # | Supplier               | Lot #   | Best Before | Quantity | Cost   | PerUnit | Left    | Special |
|--------------|---------|------------------------|---------|-------------|----------|--------|---------|---------|---------|
| 2018-10-01   | 14      | Oils Galore!           | 18-9734 | 2019-10-01  | 4.0 gal  | 208.00 | 52.00   | 4.0 gal |         |
| 2018-08-06   | 13      | Oils Galore!           | 18-8734 | 2019-08-06  | 6.0 gal  | 198.00 | 33.00   | 6.0 gal |         |
| → 2018-07-05 | 12      | EZ Soapmaking Supplies | 18-5678 | 2019-07-05  | 6.0 gal  | 192.00 | 32.00   | 3.5 gal |         |
| 2018-05-08   | 11      | Oils Galore!           | 18-1234 | 2018-10-31* | 6.0 gal  | 168.00 | 28.00   | 0.0 gal |         |

Icons: → Next batch will use this    Non-inventory lot    If \* shows next to BEST BEFORE date, this indicates the item has expired!

2. Select the record that is incorrect, click **Edit** on the toolbar. The first time you do this, you will see a message suggesting using the **Remove** button instead so a record will be created. If you don't want to do this, go ahead and enter the correct quantity.

## Related Topics

[Supplies Audit](#) - Periodic check and correction of inventory

[Removing Supply Stock](#) - Remove stock and create a record for accounting

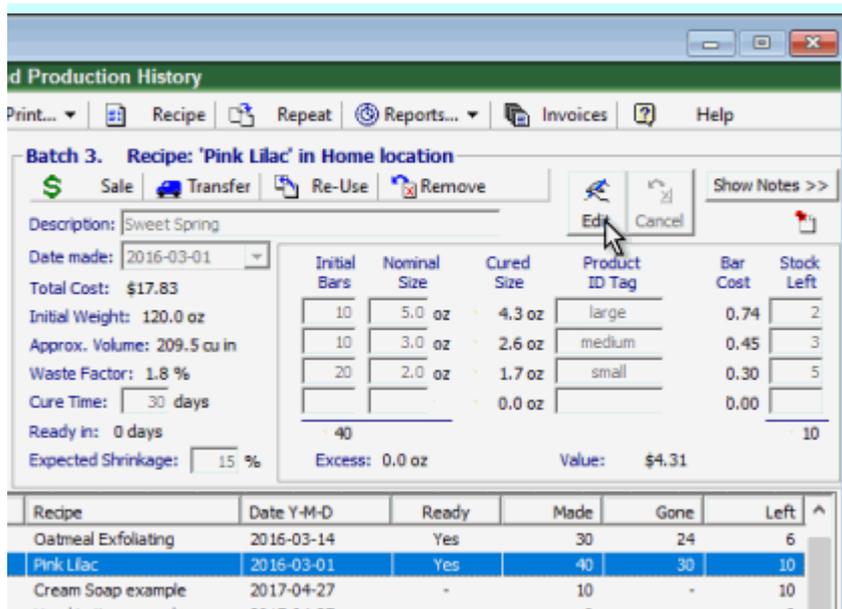
## Correcting Product stock

**Pro** If MyProducts shows an incorrect quantity in stock for a particular batch, you can correct it.

If there is more stock listed than actually exists, you can simply edit the **Stock Left** quantity. But if you need to account for the difference, you can use the **Remove** button (see the topic [Removing Product Stock...](#)).

To simply edit the stock quantity, proceed as follows:

1. In MyProducts, select the batch whose **Stock Left** quantity is incorrect, and click the **Edit** button in the Batch Details area (it changes to **Save**).
2. Correct the **Stock Left** quantity for any product sizes as needed and click the **Save** button.



Note: If you reduce a batch's total **Stock Left** quantity to zero, and have checked **Show only batches with remaining stock**, the batch will no longer be displayed in the list.

If several batches need to be corrected, see the topic [Products Audit](#).

## Periodic Stock Audits

**Pro** Periodically (e.g. annually) you will want to **audit** your Supplies and Products stocklists to make sure the quantities shown by SoapMaker are correct. This involves making a list of your actual stock, or printing out the SoapMaker lists and marking them up to match what is actually in your stockroom.

With the correct data in hand, you can then edit the quantities in SoapMaker to ensure they match.

Step by step instructions are shown in the following topics:

[Supplies Audit](#)

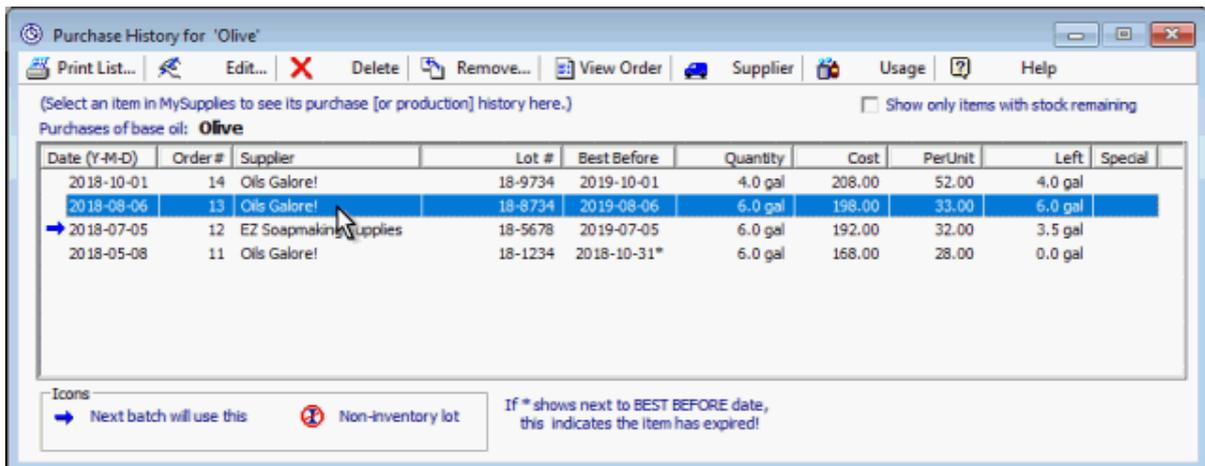
[Products Audit](#)

## Supplies Audit

### **Pro** Auditing your Supplies Stocklist

To ensure the stocklists in [MySupplies](#) are correct, do the following steps:

1. Open MySupplies, click **Print..** on the toolbar and print your entire stocklist.
2. Take the printed list to your stockroom, and mark up the printout with the actual quantity remaining of each stock item.
3. In MySupplies, select an item whose **In Stock** quantity is incorrect, and click **Purchases** on the toolbar. This will open the [Purchase History](#) report. All purchase records of the selected item are listed here, with the most recent at the top. The blue arrow indicates the oldest purchase with stock still remaining.



4. Select the record that is incorrect, click **Edit** on the toolbar (or double-click the record), and enter the correct quantity.

You can leave the **Purchase History** window open and click another item in MySupplies to see its history. Repeat these steps for each supply item whose quantity is incorrect.

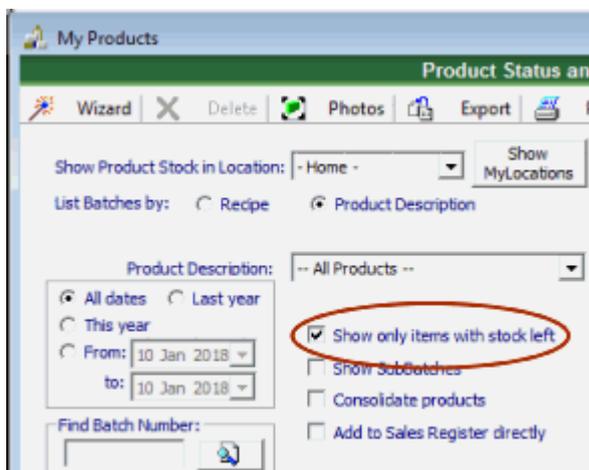
Also see [Products Audit](#)

[Products Audit](#)

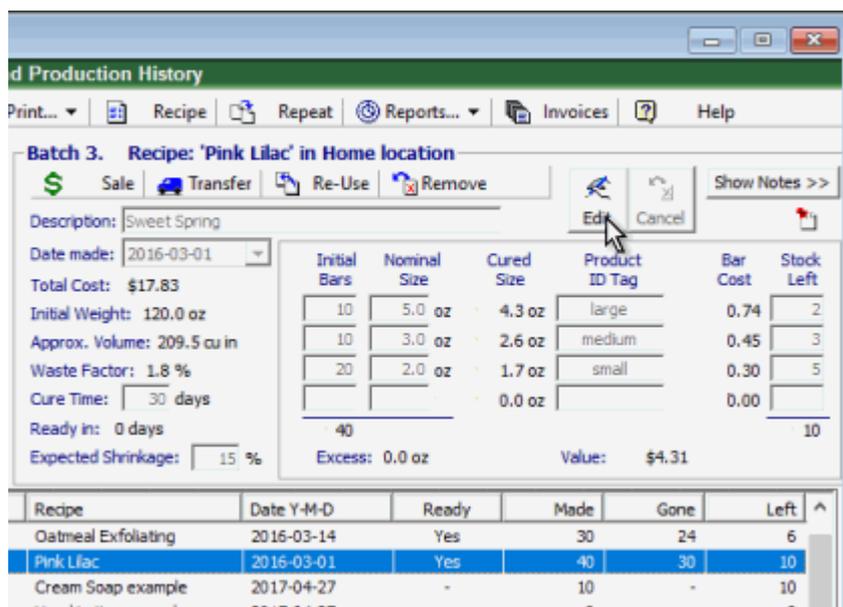
### **Pro** Auditing your Products Stocklist

To ensure the stocklist in [MyProducts](#) is correct, do the following steps:

1. Open MyProducts. Select **All Dates**. If you show batches by Recipe, then select **All Recipes** in **All Groups**. Otherwise, select **All Products**. Check **Show only batches with stock left**. Click either the **Product Description** column header, or the **Recipe** column header to sort the list.



2. Click **Print..** on the toolbar and print the displayed Batch List.
3. Take the printed list to your stockroom, and mark up the printout with the actual quantity remaining of each product stock item. (This will be easier if you have labeled your products with their Batch Number.)
4. In MyProducts, select a batch whose **Stock Left** quantity is incorrect, and click the **Edit** button in the [Batch Details](#) area.



5. Correct the **Stock Left** quantity and click the **Save** button.

Repeat these steps for each product item whose quantity is incorrect.

Note: If you reduce a batch's **Stock Left** quantity to zero, and have checked **Show only batches with remaining stock**, the batch will no longer be displayed in the list.

Also see [Supplies Audit](#)

## Deleting Old Batch Records

If [MyProducts](#) is slow to load because you have many old batch records listed, you can delete some if they have no stock remaining, but keep in mind that the following reports will no longer show entries for the deleted batches:

- [Supply Usage report](#)
- [Sales History report](#)
- [Supply Lots Used in Batch report](#)

Also, if a deleted batch was the only one with a particular **Product Description**, that product will no longer show on your [Price List](#).

If you no longer need to show these reports for previous years, you can safely delete the old batch records. You may want to print the reports before deleting batches.

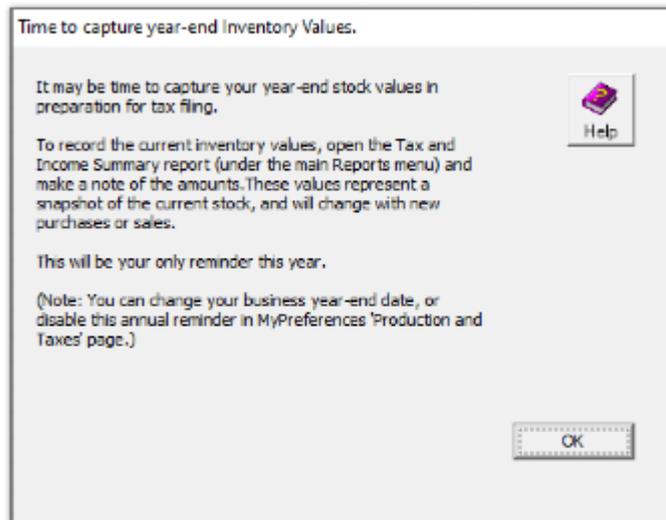
Your [Sales Registers/Invoices report](#) will **not** be affected by deleting batches, except you will not be able to edit old invoices that include products which no longer exist in your database.

NOTE: You can also speed up the loading of MyProducts by setting the date range to **Year to Date** instead of **All Dates**. SoapMaker will remember this setting next time you open MyProducts.

## Year-end Inventory

### **Pro** Capturing stock inventory at year-end

The first time you run SoapMaker after the beginning of a new year, you will see a reminder to capture your stock inventory (unless you have disabled this reminder).



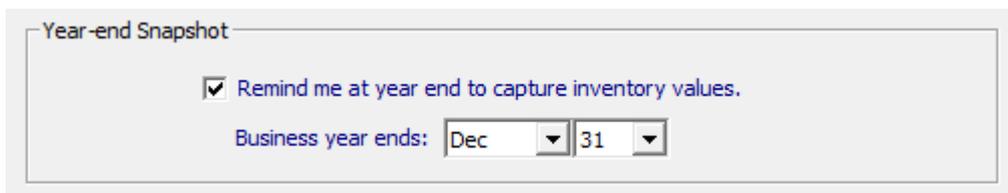
To get an accurate evaluation of your stock, you should open the [Tax and Income Summary report](#) and make a note of the inventory values **before** you record any purchases or sales for the new year...

**Current Inventory (These values should be captured at the end of each tax year):**

|   |                |                          |
|---|----------------|--------------------------|
| Total Value of Supplies (based on latest prices): | 4597.30        | (See MySupplies OPTIONS) |
| Total Value of Products in stock:                 | 313.47         |                          |
| <b>Total Inventory Value:</b>                     | <b>4910.78</b> |                          |

### Changing your Fiscal Year

If your fiscal year does not coincide with the calendar year, you can change it in [MyPreferences](#) on the **Production and Taxes** tab, and/or turn off the annual reminder:



### What if I forgot to capture at year-end?

If you neglected to capture your stock values before making changes in the new year, you can recover as follows:

1. Save your current database content:  
File menu/Backup Data and Restart... (save it somewhere so you can find it again easily)
2. Restore a backup copy saved at the end of last year:  
File menu/Restore Data...
3. Open the Tax and Income Summary report (under the main **Reports** menu) and write down the inventory values.
4. Restore the database you saved in step 1.

## Tools

This section describes the following tools:

[MyPreferences](#) - Customize SoapMaker's behaviour the way you want it

[MyMolds](#) - Create and save descriptions of your molds for use in resizing recipes

[Conversion Calculator](#) - Convert between different weight or volume measurement units

[Liquid Soap Calculator](#) - Aids in creating liquid soap recipes

[Cream Soap Calculator](#) - Aids in creating cream soap recipes

[Compare Oil Qualities](#) - Provides an easy way to compare different base oils and their effects on soap recipes

[Shopping List](#) - Shows what you need to buy in order to make planned recipes

## MyPreferences

### Customizing SoapMaker

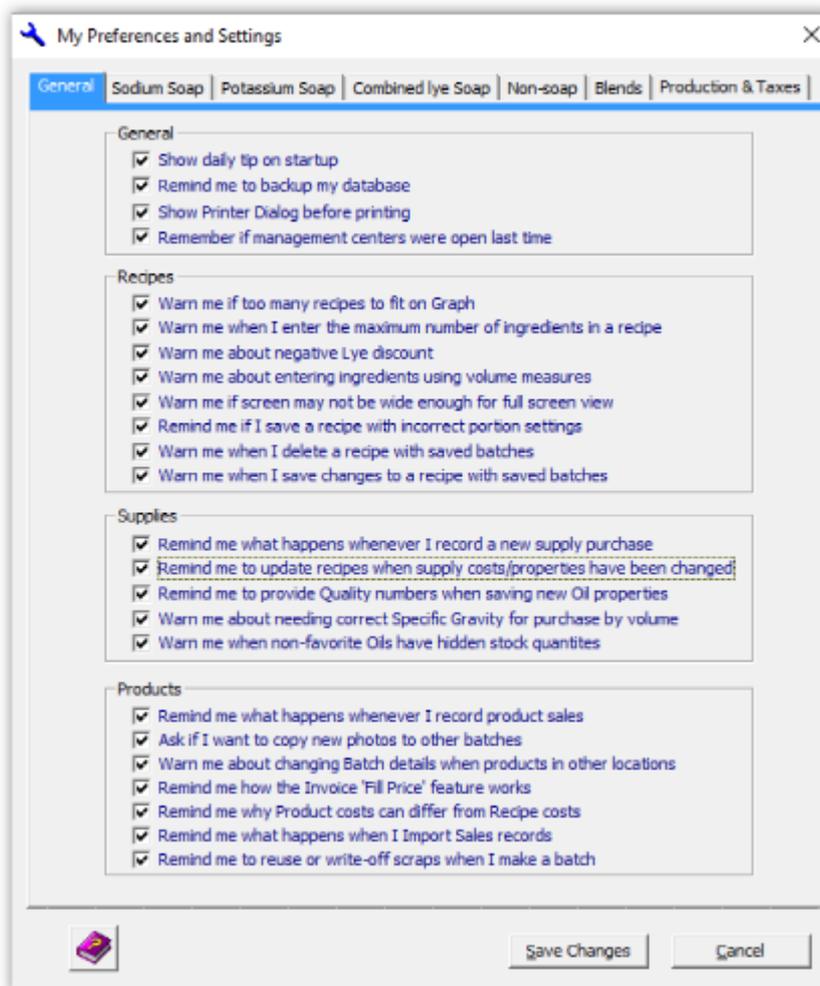
You can change the way SoapMaker behaves by setting your preferred options in the MyPreferences [dialog](#) window.

To open the MyPreferences window, click the **Prefs** button on the main toolbar, or choose **Preferences** under the **Tools** menu.

Several **tabs** are provided for different settings, including a tab for each recipe type. After making any changes you want on any tab, click the **Save Changes** button to record your changes and close the MyPreferences window. If you do not want to change anything, click **Cancel**.

**General Tab** Also see: [Recipe Preferences](#) and [Production & Taxes Preferences](#)

The General tab shows a list of options, including **reminder** and **warning** messages. Whenever SoapMaker displays one of these messages, you have the option to not have it shown again. In MyPreferences, you can turn a suppressed message on again by checking the box next to it.



## Keyboard Shortcuts

**Ctrl-S:** Save changes and close window

**ESC:** Cancel and close the window without saving.

**Ctrl-T:** Move to the next tab

## Recipe Preferences

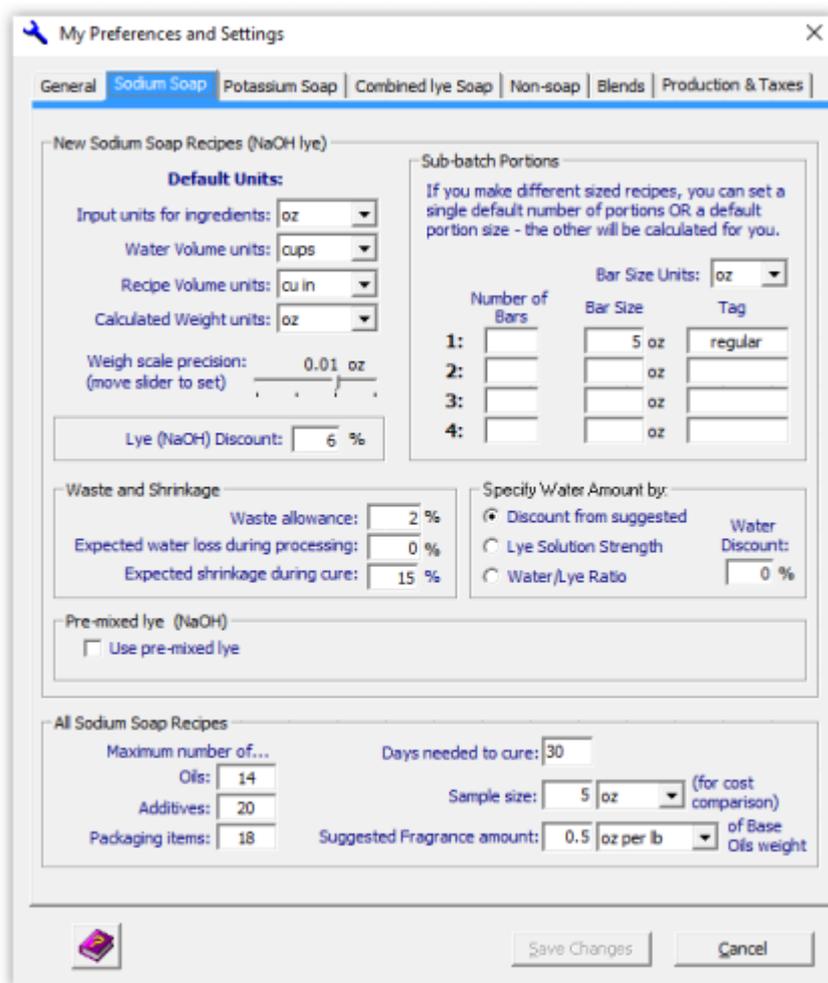
**Recipe Tabs** Also see: [General Preferences](#) and [Production & Taxes Preferences](#)

There is a tab for each type of recipe. Shown here is the **Solid Soap Recipe** tab. The tabs for other recipe types and Blends are similar.

The settings you make here provide the [default](#) options when you create a new recipe, as well as some parameters which affect existing recipes. You can override them in a particular recipe, or change the default preferences from within the recipe form.

Note that there are two areas on the page:

- **New Recipes** - These settings will be the defaults when you open a new recipe of this type, but will not affect any existing recipes.
- **All Recipes** - These settings affect both new and existing recipes of this type.



Following is a description of each option (Some are not available for all recipe types):

**Defaults for All NEW Recipes of this type:**

- Input Units** Your preferred units for entering ingredient amounts into recipes (e.g. oz or gr).
- Water Volume Units** The calculated water needed in a soap recipe will be shown in these units (e.g. cups) as well as weight units.
- Recipe Volume Units** The recipe's approximate total volume is calculated in these units and displayed in the summary area of the recipe form.
- Calculated Weight Units** Set these units to match those used by your weight scale. The weight of every recipe ingredient is shown in these units.
- Scale Precision** Set this to match the number of decimal places displayed by your scale. Calculated weights will be rounded to this precision. Also, if you resize a recipe, all ingredient quantities will be rounded accordingly. (Note: This setting affects only the way numbers are **displayed**. Internally SoapMaker maintains numbers with much greater precision)
- Bar/Portion Size Units** Set this to match the way you measure your product bars or portions (e.g. **oz** or **gr** for solid soap, **fl oz** or **ml** for liquid)
- Number of Bars/Portions and Size** You can define quantity and size for up to 4 **sub-batches**. If you want new recipes to start with default values for these, enter them here. (You can change them on the recipe form)

before saving a recipe, or later when you record a batch.)

If you prefer, you can set just a single **Bar/Portion size**, or just the **Number of Bars/Portions** — when you create a new recipe, the other value will be automatically calculated.

For each recipe type, you must specify at least one **size** or one **quantity** before you can save changes to your preferences.

**Tag** Each sub-batch in a recipe must have a unique **Tag** which identifies that product variation. This should be something related to the size or shape, and meaningful to your customers. You can define default Tags here, and change them on the recipe form if desired. For each recipe type, you must define at least one Tag to match a size and/or quantity before you can save changes to your preferences.

**Waste Allowance** This value is intended to allow for product loss during processing, such as residue that remains in the pot after pouring into molds. It affects calculations whenever you make batches, and when you resize a recipe to fit a mold. For example, if the Waste Allowance is 2%, the batch weight will be 2% **less** than the recipe weight, and the new size of a resized recipe will be 2% **more** than the mold volume.

The default value set here can be overridden on a recipe form, when you [Make a Batch](#), or [resize a recipe](#).

**Expected Water Loss** For hot process recipes, you can specify the percentage of water you expect to lose from evaporation while making the recipe. The total recipe weight and volume will be reduced accordingly.

Note: This loss amount should **not** include expected shrinkage during curing of solid soap. That is accounted for in the **Shrinkage** factor..

**Expected Shrinkage** As solid soap cures, it loses weight with evaporation of water. This parameter specifies the expected amount of shrinkage, and is used to calculate the **Cured Size** of your soap bars from their nominal sizes.

**Adjust water by...** You can choose one of:  
 - **Discount from suggested** and enter your usual discount percentage,  
 - **Lye Solution** and enter your preferred Lye solution strength, or  
 - **Water/Lye ratio** and enter your preferred ratio.

**KOH Purity** Since Potassium Hydroxide (KOH) is generally not 100% pure, you can enter a percentage here which will be the default value for all new Liquid Soap and Cream Soap recipes you create. A typical value is 90%, but if this is not indicated on your KOH container, you should check with your supplier.

**Lye Discount** Enter the discount percentage you usually specify to superfat your soap recipes.

For solid soap recipes, a lye discount of at least 4% is recommended.

For liquid or cream soaps, you may enter a discount of 0%,

or even a negative discount (e.g. -10%) which will leave excess lye in the soap base. In this case it is essential that your recipe include a **neutralizing agent** in the Additives list, and that you test the PH of your soap to ensure the finished product does not still contain lye.

**Use Pre-mixed Lye**

You can specify this option for Solid and Liquid soap recipes. Additional fields will appear where you enter the lye to water ratio of your pre-mixed solution...

The screenshot shows a user interface element with a checked checkbox labeled "Use pre-mixed lye (NaOH)". Below it is a section titled "Lye:Water ratio (by weight)" containing two input fields: the first contains the number "1" and is followed by the text "parts lye to", and the second contains the number "2" and is followed by the text "parts water".

The pre-mixed lye solution option is not available for Cream soap recipes.

**Lye ratio**

For **Cream soap** recipes, you use both Sodium Hydroxide (NaOH) and Potassium Hydroxide (KOH) lye. You specify your usual ratio here:

The screenshot shows a user interface element with a label "Ratio of Sodium Hydroxide (NaOH) to Potassium Hydroxide (KOH) (by weight):". Below the label are two input fields: the first contains the number "1" and is followed by the text "parts NaOH to", and the second contains the number "5" and is followed by the text "parts KOH".

**Defaults for ALL Recipes of this type:**

- Maximum number of...** You can increase the maximum number of oils, additives or packaging items in recipes. Setting these numbers higher than necessary will result in more memory use, and slower response when opening a recipe.
- Days needed to cure** For solid soap, enter the typical time needed before the soap is ready to use. This will determine when products show 'Ready' in [MyProducts](#).
- Sample size** This size (either a weight or volume) is used for the **cost per sample** calculation in [MyRecipes](#). It enables you to compare the costs of different sized recipes using this standard sample size.
- Fragrance Amount** Set this to the desired rate per quantity of base oils. The [Fragrance Calculator](#) on each recipe's **Additives** tab will then suggest the appropriate amount.

**Production and Taxes**

**Production & Taxes Tab** Also see: [General Preferences](#) and [Recipe Preferences](#)

This tab contains several areas related to your production. Each one is described below...

My Preferences and Settings

General | Sodium Soap | Potassium Soap | Combined Iye Soap | Non-soap | Blends | **Production & Taxes**

Sales Tax (Used in Supply Shipment and Sales Record forms)

Select Tax Group: Default

| Use                                 | Name | Rate | Tax on purchases is:                    |                                       |
|-------------------------------------|------|------|---|---------------------------------------|
| <input checked="" type="checkbox"/> | Tax1 | 10 % | <input checked="" type="radio"/> Credit | <input type="radio"/> Cost            |
| <input checked="" type="checkbox"/> | Tax2 | 5 %  | <input type="radio"/> Credit            | <input checked="" type="radio"/> Cost |
| <input type="checkbox"/>            | Tax3 | 0 %  | <input type="radio"/> Credit            | <input checked="" type="radio"/> Cost |

Year-end Snapshot

Remind me at year end to capture inventory values.

Business year ends: Dec 31

Labor

Default values for new recipes:

Hours: 0

Hourly Rate: 0

Supply Stock Value

Current market value (based on most recent purchase prices)

Based on actual price of each lot purchased

Expiry Warning

Show this icon in MySupplies at 0 days before expiry date reached.

Product Price Categories

Retail  
Wholesale

For use in your Price List

Purchase Overhead Costs

Supply Order overhead costs can be distributed proportionally to each item's Adjusted Cost; otherwise, these overheads will be shown in the Tax and Income Summary report:

- Shipping cost
- Non-credit sales tax
- Customs charges
- other overhead costs

Adjust item costs to include overhead share

## Sales Tax

If you pay or collect sales taxes or value-added taxes, use this page to specify the **tax names** and **rates**. Each tax can be marked as either **Credit** or **Cost**. If Credit, tax on supplies you purchase and other expenses will be included in your claimable tax credits on the [Tax and Income Summary](#) report. If Cost, tax will be included in your overall business costs.

If you sell into different regions with different taxes, you can define a **tax group** for each region. Each tax group can have up to three distinct taxes with their own names and rates. If you only sell in one tax region, just use the **Default** group.

To make changes to a tax group, select it from the drop-down list, check the **Use** box for each tax that is required, and enter the **name** and **rate** of the tax. If you don't use a tax, leave it unchecked. To define a new group, click the **New Group...** button and then enter a name for that group.

You can rename or delete a selected group by clicking the appropriate button. (Note: you cannot rename or delete the **Default** group.)

The applicable tax group can be selected on the [New Supply Purchase form](#), and can be selected on the [Sales Register/Invoice form](#) to be included in the amount invoiced to your customer. You can specify the preferred tax group for each **customer branch** on the [Customers report](#) - then when you record sales to that customer, the tax group will be automatically selected.

For more information on setting and using taxes, see the [Sales Tax](#) topic.

## Year-end Snapshot **Pro**

When checked, this option will display a reminder to capture your stock values the first time you open SoapMaker in the new year. This is done using the [Tax and Income Summary report](#).

It is important to capture these values for tax purposes at that time, as they represent a snapshot of your

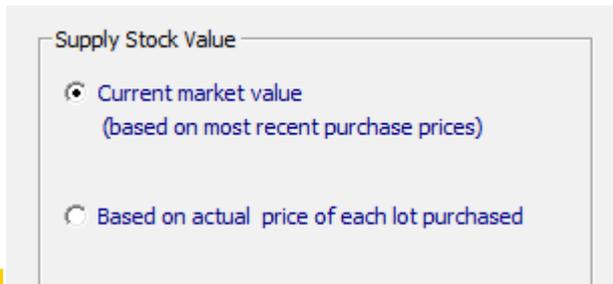
inventory, and will change as soon as you record new purchases or sales.

By default, the year end is December 31, but if your business year does not correspond to the calendar year, you can change the date here.

### Labor **Pro**

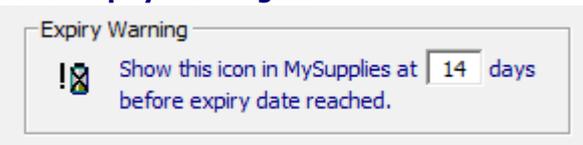
When you open a new recipe, these values will automatically be entered on the recipe's **Labor** tab. You can change them there if desired before saving the recipe. If you use this feature, your labor cost per bar/portion will be shown in your [Price List](#) as an aid in setting your prices to achieve the desired profit margin.

### Supply Stock Value **Pro**



This option determines the way SoapMaker calculates the value of all your supplies in stock. You can also set or change this in [MySupplies](#).

### Stock Expiry Warning **Pro**



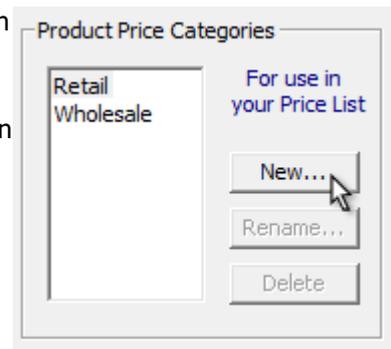
Your stock list in MySupplies shows [icons](#) for the status of each item. If some of the stock of a particular item has reached or passed the **expiry date**, this icon is shown. You can get advance warning by setting the number of days **before** expiry date is reached that you want to be warned - this may help you identify items that should be used up soon.

### Product Price Categories **Pro**

These are used when you create your Price Lists. SoapMaker comes with two categories - **retail** and **wholesale**. But you can add more, or rename them if desired.

You can specify a preferred price category for each of your customers on the [Customers report](#).

For more information see the [Price List](#) topic.



### Purchase Overhead Costs

When recording supply purchase orders, you can add overhead costs that apply to the entire order. These overheads can include:

- Shipping cost
- Any sales tax which you are not able to claim as credit
- Customs charges for imported items
- Any other cost that affects the entire order

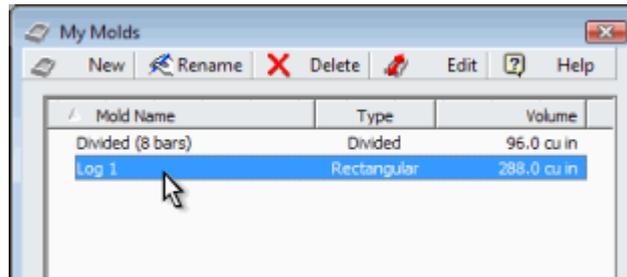
You have the option to distribute these overhead costs proportionally by adjusting the cost of each item in the order (both materials and expense items), and you can set the default value of this option here so it will be used for all new supply purchase orders. (Changing this will not affect orders already saved.) For more information about this option, see [Overhead Costs](#).

## MyMolds

### List of Molds for Resizing Recipes

MyMolds lists all the molds you have specified for use in [resizing](#) recipes.

To open MyMolds, click the **Molds** button on the main Toolbar, or choose **Show MyMolds** from the main **Tools** menu.



The list can be **sorted** by clicking any column header. Click again to sort in reverse order.

Commands are provided for defining a new mold, or modifying an existing one. To use a command, select a mold from the list and either click a toolbar button, or right-click and select a command from the pop-up menu.

### Commands

- Delete** Delete the selected mold from the list
- Edit** Opens the [New/Edit Mold](#) dialog so you can change specifications
- Help** Opens this Help page
- New** Opens the [New/Edit Mold](#) dialog - Define a new mold which will be added to the list
- Rename** Allows you to edit the mold name in the list

### Window stuff

You can stretch the window higher by dragging the bottom or top edge vertically.

Use the keyboard **up/down arrows** to select a different mold from the list

To close MyMolds, click the **X** in the upper right corner, or select **Hide MyMolds** from the main **Tools** menu.

### Keyboard Shortcuts

- Ctrl-N:** Create a NEW item
- Ctrl-S** or **ENTER:** Save changes
- ESC:** Cancel changes

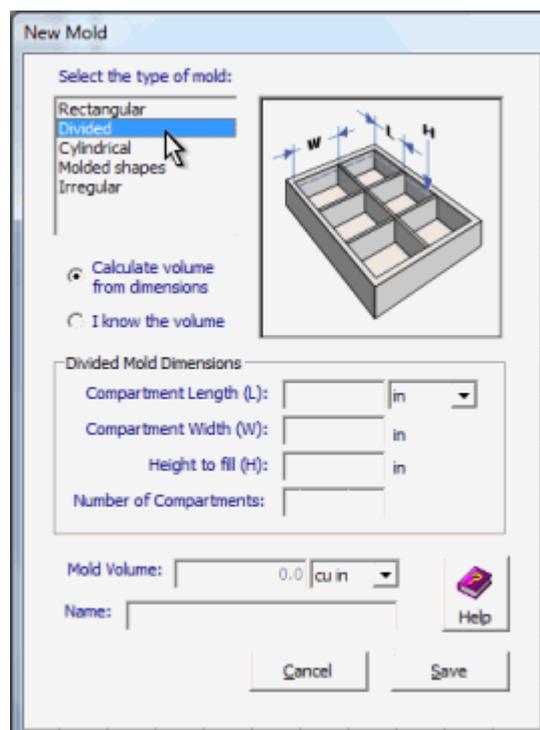
### Related Topics

- [New/Edit Mold](#) - Define a new mold or edit an existing one
- [Resizing a Recipe](#) - Change the size of a recipe to fit a mold

### New Mold

#### New Mold or Edit Mold Dialog

This [dialog](#) window is accessed by clicking the **New Mold** button on the [Resize Recipe](#) form, or from [MyMolds](#) by using either the **New** command or the **Edit** command.



## New Mold

When specifying a new mold, select the **mold type** from the list. A diagram will be displayed to assist you in entering the dimensions needed to calculate the mold volume. The dimensions you need to enter will depend on the shape and type of mold.

The "molded shapes" type allows you to specify how many shaped cavities are in the mold, and the volume of each cavity, or you can treat each individual cavity as a separate mold.

If you know the mold volume and do not need to calculate it, choose the **I know the volume** option, and enter the **Mold Volume** quantity and units.

Enter a **name** for the mold to differentiate it from others in the MyMolds list.

## Edit Mold

If you are editing an existing mold, the dialog window opens with the current type selected, and the volume and name filled in. You can make any changes you like.

## Save

When done, click the **Save** button to save the new or changed mold definition in MyMolds. The window will close, and the mold will now be available for resizing recipes.

If you are editing an existing mold, and have changed the name, you will have the option to either **replace** the previous mold with the new name, or to save as a **new mold** and leave the original unchanged.

## Keyboard Shortcuts

**Esc** or **Alt-C** - Cancel

**Ctrl-S** - Save

## Related Topics

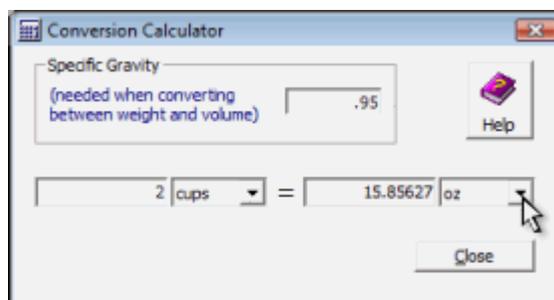
[MyMolds](#) - List of available molds

[Resizing a Recipe](#) - Change the size of a recipe to fit a mold

## Conversion Calculator

This handy calculator converts one measure to another.

To open the calculator, click the main toolbar **Convert** button, or choose **Conversion Calculator** under the Tools menu.



On the left side, enter the **quantity** and **units** you want to convert (e.g. 2 cups). On the right, choose the desired **units** from the drop-down list (e.g. oz).

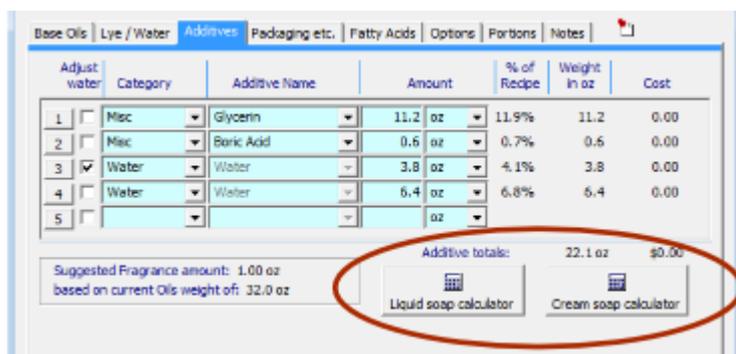
The converted quantity is displayed (e.g. 15.85627). You can copy the result, and paste it into a recipe or other window.

When converting between weight and volume units as in this example, you need to enter the [specific gravity](#) of the substance being measured for an accurate result. For **dry ingredients**, avoid using volume measures, as weight conversion will generally be inaccurate.

Note: All non-metric units used in SoapMaker are U.S. measures.

To close the calculator, click the **Close** button or press **Esc** on your keyboard.

## Liquid Soap Calculator



This calculator assists in determining quantities of process-specific **Additives** when making liquid soap.

To open the calculator, click the **Calculator Button** on the [Additives tab](#) of a Potassium or Combined lye Soap Recipe form.

The calculator window has 3 areas:

### Current Recipe Amounts

Make sure you have set the recipe's lye discount as desired. In this example, the discount has been set to -10%, which results in 1.13 oz of excess lye which requires neutralizing.

### Dilution

This calculates the **extra water** needed to dilute the soap paste. Enter the desired **percentage of actual soap** to see the additional water needed to reach this percentage.

If you want this water amount added to the recipe's Additives section, check the **add to recipe** box.

## Neutralizer

Select the **neutralizing agent** from the drop-down list - your choices are **Borax**, **Boric Acid**, or **Citric Acid**.

The quantity of the selected agent needed to neutralize the excess lye is calculated, as well as the amount of water needed to dissolve it before adding to the soap. The neutralizer solution strength is pre-set to the recommended percentage, but you can override this by entering a different amount.

In case you have pre-mixed a larger quantity of neutralizer solution, the total quantity of **solution** is also shown in both weight and volume units. (Make a note of this before closing the calculator.)

If you want the neutralizer and water amount added to the recipe, check the **add to recipe** box.

**Important:** If you have defined Citric Acid as a **base oil**, you cannot specify it as neutralizer because the calculator assumes the neutralizing ingredient is an **additive**. For more information on how to deal with this, please see [Using Citric Acid to improve your soap](#).

The screenshot shows the 'Liquid Soap Calculator' window with the following data:

| Current Recipe Amounts                                 |                     |
|--|---------------------|
| Current Weight of Paste (Oils, Lye and initial Water): | 168.49 oz           |
| Lye Discount: -10.0 %                                  | Excess Lye: 1.13 oz |
| Recipe Water (and water substitutes): 118.60 oz        |                     |

| Dilution                                     |          |
|--|----------|
| Percent actual soap desired (oils plus lye): | 30 %     |
| (Recommended range: 15 to 40%)               |          |
| Added Water Needed:                          | -2.19 oz |
| <input type="checkbox"/> add to recipe       |          |

| Neutralizer                             |         |
|---|---------|
| Neutralizing Agent:                     | Borax   |
| Neutralizer Solution Strength:          | 33 %    |
| (Recommended for this agent: 33%)       |         |
| Quantity of Borax needed:               | 1.33 oz |
| Dissolved in this much boiling water:   | 2.65 oz |
| <input type="checkbox"/> add to recipe  |         |
| Total quantity of 33% solution: 3.98 oz |         |
| or: 3.09 fl oz                          |         |

NOTE: Suggested neutralizer amount is approximate.  
Test your soap PH to ensure excess lye has been neutralized.

Buttons: Cancel Add checked items to Recipe

## Finishing

If you want checked items added to the recipe, click the **Add Checked Items** button, otherwise click **Cancel**.

If you chose to add items, they will be automatically entered into the **Additives** section of your recipe, and **Notes** will be added to record these additional ingredients.

This calculator is based on a process described in "Making Natural Liquid Soaps" by Catherine Failor. Calculated quantities are suggestions only - adjust them in your recipe as needed to reflect your own process.

## Related Topic

[Recipe Additives](#)

[Using Citric Acid to improve your soap](#)

## Cream Soap Calculator

| Adjust water                        | Category | Additive Name | Amount  | % of Recipe | Weight in oz | Cost |
|-------------------------------------|----------|---------------|---------|-------------|--------------|------|
| <input type="checkbox"/>            | Misc     | Glycerin      | 11.2 oz | 11.9%       | 11.2         | 0.00 |
| <input type="checkbox"/>            | Misc     | Boric Acid    | 0.6 oz  | 0.7%        | 0.6          | 0.00 |
| <input checked="" type="checkbox"/> | Water    | Water         | 3.8 oz  | 4.1%        | 3.8          | 0.00 |
| <input type="checkbox"/>            | Water    | Water         | 6.4 oz  | 6.8%        | 6.4          | 0.00 |
| <input type="checkbox"/>            |          |               |         |             |              |      |

Additive totals: 22.1 oz \$0.00

This calculator assists in determining quantities of process-specific **Additives** when making cream soap.

To open the calculator, click the **Calculator Button** on the [Additives tab](#) of a Combined Lye Soap Recipe form.

The calculator window has 4 areas:  
**Current Recipe Amounts**

Shows the current weight of Base Oils and Water in your recipe.

### Glycerin

This calculates the **Glycerin** quantity. Enter the desired **percentage of oils weight** to Glycerin quantity needed.

If you want this Glycerin amount added to the recipe's Additives section, check the **add to recipe** box.

### Supercream

Select the **Supercreaming agent** from the drop-down list - your choices are **Stearic Acid** or **Boric Acid**.

The suggested quantity of the selected agent is calculated.

If you choose Boric Acid, the amount of water needed to dissolve it is also shown, and in case you have pre-mixed a larger quantity of Boric Acid solution, the quantity of solution is shown in both weight and volume units. (Make a note of this before closing the calculator.)

If you want the Supercream agent (and water amount if any) added to the recipe, check the **add to recipe** box.

### Additional Water

Suggested additional water to bring the soap to the desired consistency. You can have this added to the recipe, or add the appropriate amount yourself later based on your process and experience.

### Finishing

If you want checked items added to the recipe, click the **Add Checked Items** button, otherwise click **Cancel**.

If you chose to add items, they will be automatically entered into the **Additives** section of your recipe, and **Notes** will be added to record these additional ingredients.

This calculator is based on a process described in the booklet "Making Cream Soap" by Catherine Failor. Calculated quantities are suggestions only - adjust them in your recipe as needed to reflect your own process.

### Related Topic

[Recipe Additives](#)

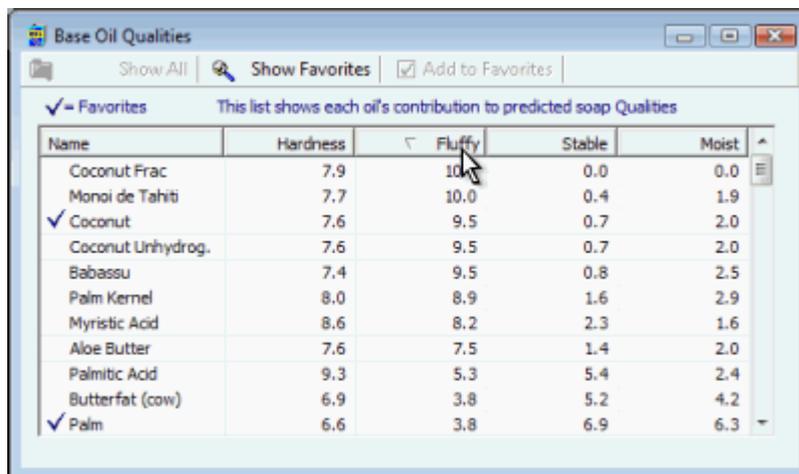
## Compare Oil Qualities

### Base Oil Qualities List

To open this window, select **Base Oil Qualities** under the **Tools** menu.

You can choose to show only your **favorite** oils (the ones displayed in MySupplies, and in recipe drop-down lists), or you can show all the standard oils that come with SoapMaker. Your favorites are highlighted with a check mark.

From here you can also add an oil to your **favorites** list by selecting it and clicking the **Add to Favorites** button on the toolbar.



The screenshot shows a window titled "Base Oil Qualities" with a toolbar containing "Show All", "Show Favorites", and "Add to Favorites" (checked). Below the toolbar, there is a checkbox for "Favorites" (checked) and a subtitle: "This list shows each oil's contribution to predicted soap Qualities". The table below lists various oils with columns for Name, Hardness, Fluffy, Stable, and Moist. The "Fluffy" column is sorted in descending order.

| Name              | Hardness | Fluffy | Stable | Moist |
|-------------------|----------|--------|--------|-------|
| Coconut Frac      | 7.9      | 10.0   | 0.0    | 0.0   |
| Monoi de Tahiti   | 7.7      | 10.0   | 0.4    | 1.9   |
| ✓ Coconut         | 7.6      | 9.5    | 0.7    | 2.0   |
| Coconut Unhydrog. | 7.6      | 9.5    | 0.7    | 2.0   |
| Babassu           | 7.4      | 9.5    | 0.8    | 2.5   |
| Palm Kernel       | 8.0      | 8.9    | 1.6    | 2.9   |
| Myristic Acid     | 8.6      | 8.2    | 2.3    | 1.6   |
| Aloe Butter       | 7.6      | 7.5    | 1.4    | 2.0   |
| Palmitic Acid     | 9.3      | 5.3    | 5.4    | 2.4   |
| Butterfat (cow)   | 6.9      | 3.8    | 5.2    | 4.2   |
| ✓ Palm            | 6.6      | 3.8    | 6.9    | 6.3   |

This table can be **sorted** by clicking any column header. Click again to sort in reverse order. In the example above, the table is sorted by "Fluffy" in descending order.

To enlarge the window, drag an edge or corner.

You can leave this window open while working in other areas, but the Favorite choices will not be updated if you change them elsewhere unless you close and reopen the window.

To close the Base Oil Qualities list, click the **X** in the upper right corner, or select **Close Window** from the main **File** menu.

## Shopping List

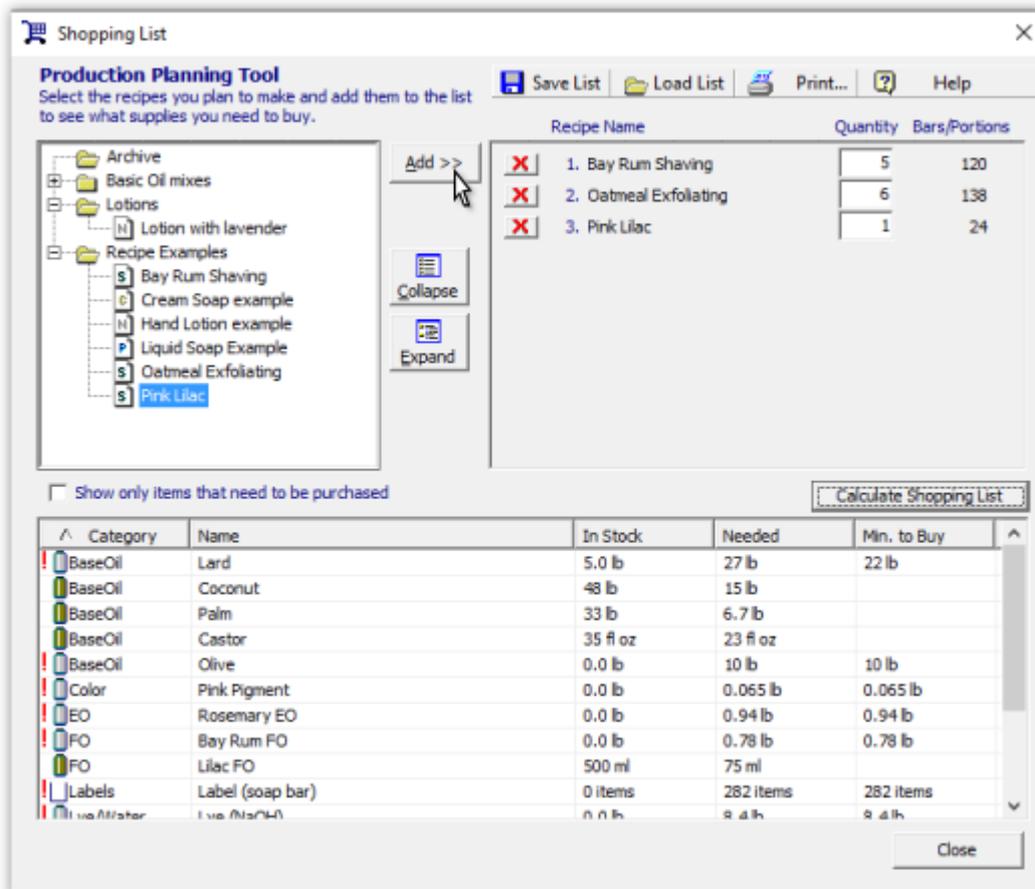
### Pro Production Planning Tool

To open this tool, select **Shopping List** under the **Tools** menu, or click the **Shopping** button on the main toolbar.

Select the recipes you plan to make, and the quantity of each. The shopping list will show what supplies you will need, and additional quantities that need to be purchased in order to make these recipes. You can print the list and use it to prepare your supply orders.

To add a recipe, select it from the list on the left and click the **Add** button, or **double-click** the recipe name. When you add a recipe, the **quantity** is set to one, but you can change this to any integer number.

To remove a recipe from the list, click the little **X** next to it.



For each recipe listed, the total number of bars/portions is shown, based on the recipe settings and the quantity of this recipe you plan to make.

When you have added all the recipes you plan to make, and entered the desired quantities, click the **Calculate Shopping List** button. This will examine your current stock levels and calculate additional stock you will need to purchase in order to make these recipes.

The list at the bottom shows, for each required ingredient:

- the quantity currently **in stock**,
- the total **quantity needed** to make the selected recipes, and
- the minimum additional quantity that must be **purchased**.

You can choose to show **all** ingredients used by the selected recipes, or only those for which **additional purchases** are needed.

The icons on the left have the same meaning as those used in [MySupplies](#).

Note: Items which are not being tracked will show "-" in the **In Stock** column, and the **Min. to Buy** will be the total **Needed**.

## Blends and Reused Products

If any of the selected recipes includes a custom **blended ingredient** or an additive which is a reused product, and the quantity needed exceeds the ingredient's current **In Stock** quantity, the number of full **batches** of the blend or reused product needed to satisfy the recipes is shown in the **Min. to Buy** column. The component ingredients needed to make those blend batches or reused product batches are included in the list (and may need to be purchased if there is insufficient stock). A note appears at the bottom explaining this...

| Category   | Name          | In Stock    | Needed     | Min. to Buy |
|------------|---------------|-------------|------------|-------------|
| EO         | Lavender EO   | 123.0 fl oz | 10.8 fl oz |             |
| Lye/Water  | Water         | 5.2 gal     | 1.5 gal    |             |
| Herbs      | Lavender buds | 0.8 lb      | 1.3 lb     | 0.5 lb      |
| BlendedAdd | Lavender Tea  | 0.0 lb      | 6.3 lb     | * 2 batches |

\* Ingredients needed to make these blend batches are included in the list.

Done

## Toolbar Commands

- Save List** The current list of planned recipes and their quantities will be saved as a text file for later use.
- Load List** Load a previously saved list of planned recipes.
- Print** Print the current list of planned recipes, and shopping list of ingredients.
- Help** Show this help topic.

## Window stuff

You can stretch the window vertically by dragging the lower edge.

When you have finished, click the **Done** button to close the window.

## Reports

This section describes the following reports:

[Labor Report](#) - Use this to track wages

[List of All Purchases](#) - Lists every supply purchase or expense item in a selected category and date range.

[List Recipes](#) - Lists all recipes containing a particular ingredient.

[Product Transfers](#) - Lists products transferred to another location (e.g. consignment customer).

[Purchase History](#) - Lists all purchase records for a selected supply item.

[Reused Products](#) - Lists products reused as supplies for use in new recipes

[Sales History](#) - Lists all the sales records for selected Recipes.

[Sales Registers/Invoices](#) - Lists all customer invoices, and sales registers from venue sales.

[Stock Removed Report](#) - Lists supplies and products removed from stock

[Supply Lots Used in Batch](#) - Lists all the ingredient lots used to make a particular product batch.

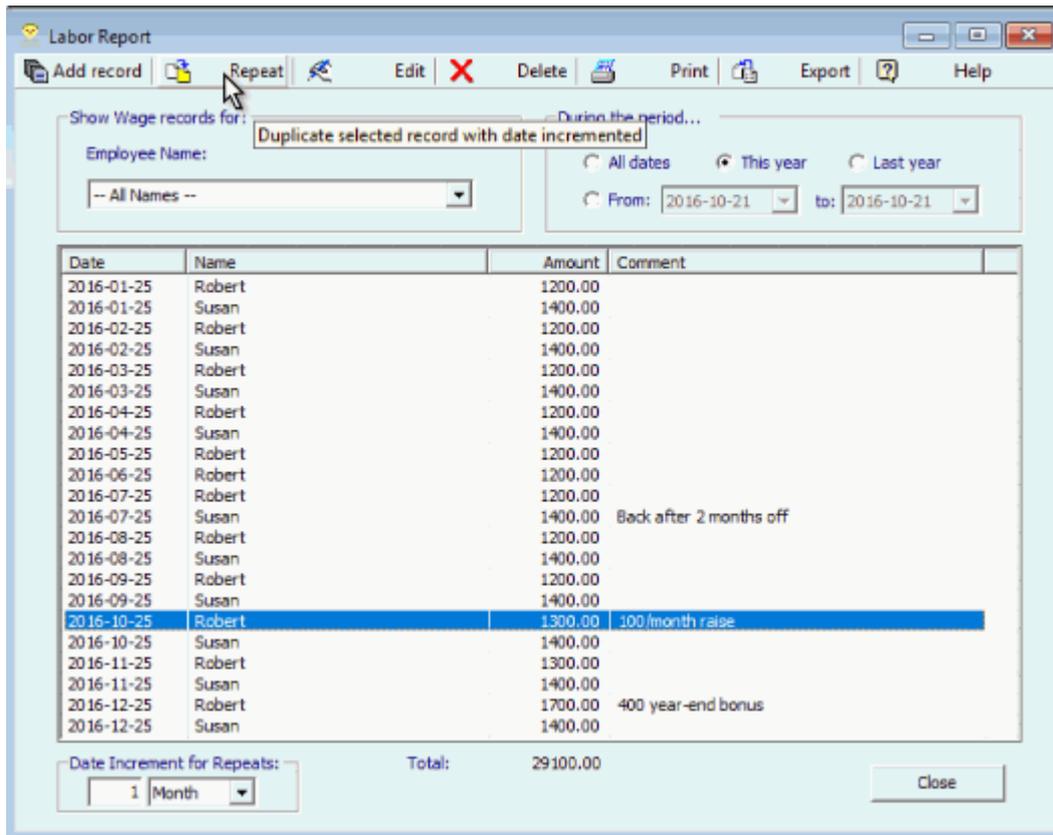
[Supply Orders](#) - Lists all your supply shipments.

[Supply Usage](#) - Lists all the product batches you have made using a particular ingredient or packaging item.

[Tax & Income Summary](#) - Shows current inventory value, and tax and income amounts for selected period

## Labor Report

**Pro** The Labor Report enables you to record and track employee wages. The total wage amount will appear on the [Tax and Income Summary](#) report.



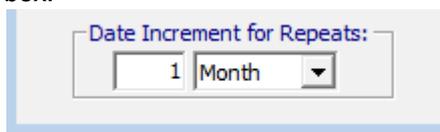
You can display the list for a specific employee name, or for all names, and you can choose a date range. The **Total** shows the sum of all displayed records for the selected name and date range.

The report can be **printed**, or **exported** to open in a spreadsheet.

### Commands

The following commands are available from the **toolbar** or **pop-up menu**:

- Add Record** Add a new record to the list. This will open the **Add Labor Record** dialog.
- Repeat** This creates a new record with the same content as the selected one, except that the date is incremented by the value currently set in the **Date Increment** box:



By repeatedly clicking this button, you can fill in regular wage payments.

- Edit** Edit the **contents** of the selected record. This will open the **Change Labor Record** dialog.
- Delete** Delete the selected record(s). You can select multiple records for deletion using Shift-Click or Ctrl-Click.
- Print** This will print the list as currently displayed. A print preview will be shown first.
- Export** This will save the contents of the list as a CSV file that can be opened in a spreadsheet program.
- Help** Opens this Help topic.

### Window stuff and Shortcuts

You can stretch the window wider or taller by dragging an edge. SoapMaker will remember the new size. Press the **Esc** key to close the window.

## Related Topics

[Tax and Income Summary](#)

## List of all Purchases report

This report shows every item purchased within the selected time period. You can limit the report to a particular **category** of supply, and/or a particular **supplier**. For each item, the Price you were charged is shown, along with the Adjusted Cost which includes overheads like shipping. The **Inventory** column shows **No** if the item was not considered a business expense when you recorded the purchase.

To open the report, select **List of All Purchases** under the main **Reports** menu.

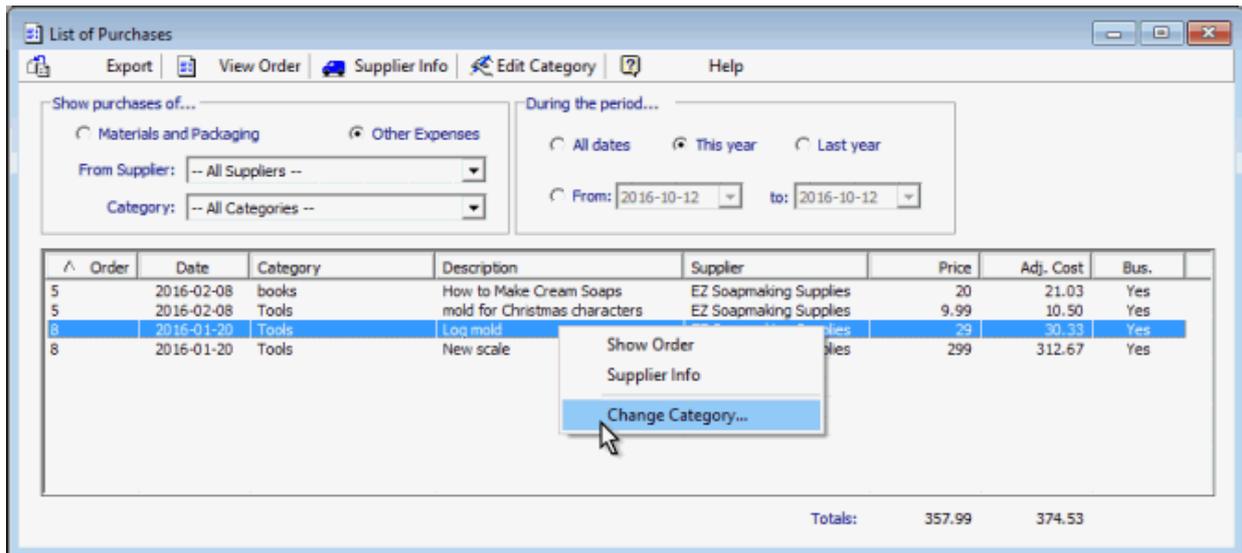
| Order          | Date       | Category | Name         | Supplier            | Quantity    | Price          | Adj. Cost      | Inv. |
|----------------|------------|----------|--------------|---------------------|-------------|----------------|----------------|------|
| 1              | 2016-02-01 | Base Oil | Castor       | Oils Galore!        | 112.0 fl oz | 57.00          | 59.78          | Yes  |
| 1              | 2016-02-01 | Base Oil | Cocoa Butter | Oils Galore!        | 10.0 lb     | 25.00          | 26.22          | Yes  |
| 1              | 2016-02-01 | Base Oil | Coconut      | Oils Galore!        | 10.0 gal    | 75.00          | 78.65          | Yes  |
| 1              | 2016-02-01 | Base Oil | Eve Primrose | Oils Galore!        | 28.0 fl oz  | 16.00          | 16.78          | Yes  |
| 1              | 2016-02-01 | Base Oil | Hemp         | Oils Galore!        | 28.0 fl oz  | 12.00          | 12.58          | Yes  |
| 1              | 2016-02-01 | Base Oil | Olive        | Oils Galore!        | 8.0 gal     | 179.00         | 187.72         | Yes  |
| 1              | 2016-02-01 | Base Oil | Palm         | Oils Galore!        | 10.0 gal    | 75.00          | 78.65          | Yes  |
| 1              | 2016-02-01 | Base Oil | Rice Bran    | Oils Galore!        | 56.0 fl oz  | 33.00          | 34.61          | Yes  |
| 1              | 2016-02-01 | Base Oil | Soybean      | Oils Galore!        | 1.0 gal     | 16.00          | 16.78          | Yes  |
| 1              | 2016-02-01 | Base Oil | Stearic Acid | Oils Galore!        | 10.0 lb     | 25.00          | 26.22          | Yes  |
| 2              | 2016-02-03 | FO       | Bay Rum FO   | Up Your Nose Aromas | 32.0 fl oz  | 18.00          | 19.39          | Yes  |
| <b>Totals:</b> |            |          |              |                     |             | <b>1051.29</b> | <b>1110.24</b> |      |

You can select an item from the list, and then view the **purchase order** which includes it, or get the **supplier's** contact information, by clicking the appropriate button on the toolbar, or right-clicking and choosing it from the pop-up menu.

The list can be **sorted** by clicking a column header. You can enter a date range, or choose one of the pre-assigned ranges (e.g. 'This year').

Returned items are displayed in **RED**, with negative costs.

In addition to materials used to make your products, you can also record and see listed here other expenses related to your business. In the example below, we have selected the **Other Expenses** option. The **Bus.** column indicates whether items were recorded as a **business expense**.



For **Other Expense** items, you can change the Category by clicking the **Edit Category** button on the toolbar, or choosing **Change Category** from the pop-up menu. For more information, see the topic [Edit Expense Category](#). (Note: you cannot change the category of Materials and Packaging items here, but you can do so in [MySupplies](#).)

The Purchases list can be exported as a CSV file which can be opened in a spreadsheet. Just click the **Export** button. For more information on export format, see the topic [Exporting reports](#).

When viewing a long list, you can stretch the window taller by dragging the bottom or top edge vertically.

## Related Topics

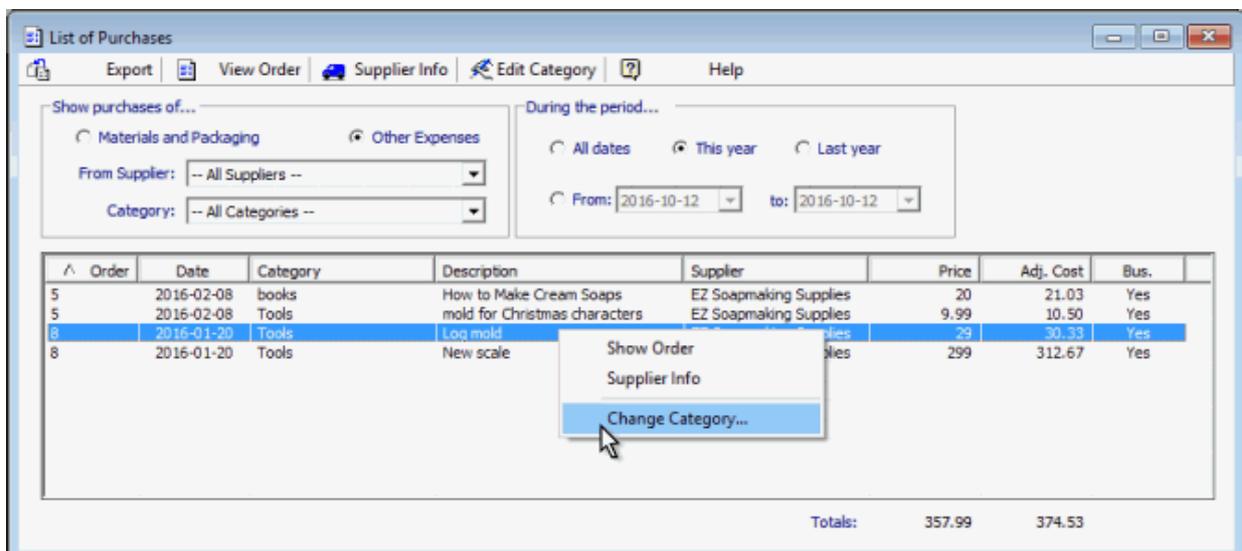
[Suppliers List](#) - Name and contact information for all your suppliers

[Purchase History Report](#) - List of purchases for a selected supply item

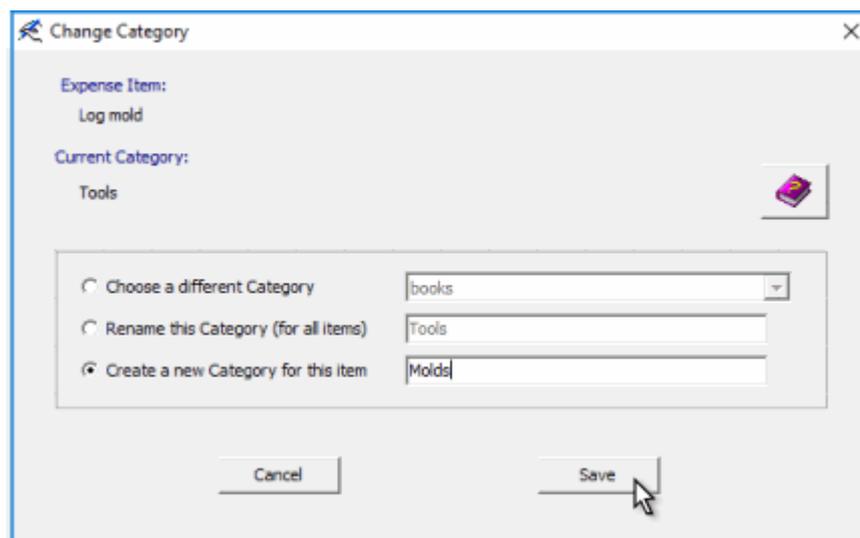
[Recording Purchases](#) - The New Supply Purchase Form

## Edit Expense Category

For **Other Expense** items displayed in the [List of All Purchases report](#), you can change the Category by clicking the **Edit Category** button on the toolbar, or choosing **Change Category** from the pop-up menu. (Note: you cannot change the category of Materials and Packaging items here, but you can do so in [MySupplies](#).)



This will open the **Change Category** dialog...



Here you can:

- Choose a different category from the drop-down list
- Re-name the category (for all items with the same category), or
- Create a new category for the selected item

Note: You can also create new **expense categories** 'on the fly' when recording a new purchase (see [Recording Purchases](#)).

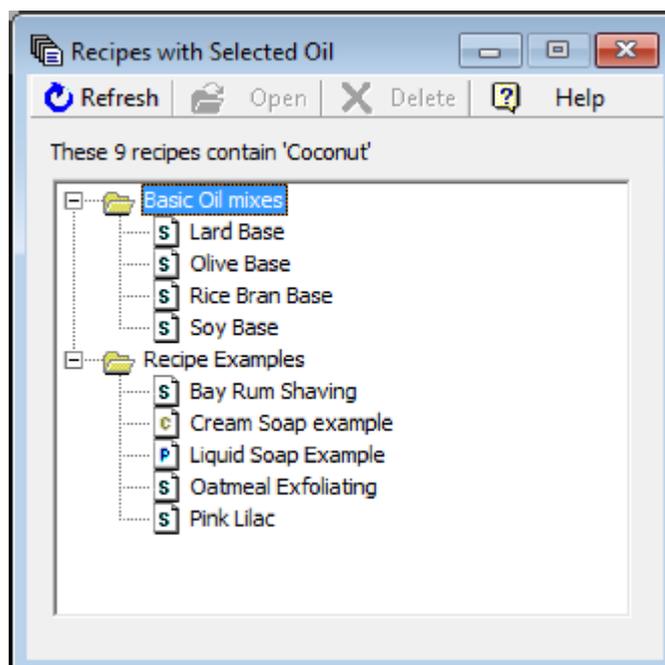
## List Recipes with Ingredient X

### Recipes with specified ingredient

This handy little report will list all your recipes that use a particular ingredient or packaging item.

To open the list, select a supply item in MySupplies, and Click the **Recipes...** button on the toolbar, or right-click the item and choose **List Recipes** from the pop-up menu.

The report lists all recipes by group which use the selected item. This example shows recipes which use the Base Oil "Coconut".



**Pro** If you have **blend** formulas which include the selected ingredient, they will also be listed under 'group' names **Blended Oil Formulas** and **Blended Additive Formulas**

If the list is long, a scrollbar will appear. A group can be expanded or collapsed by double-clicking the group name, or clicking the **+** or **-** sign.

When you select a different item in MySupplies, the recipe list is updated automatically.

## Commands

The following commands are available from the **toolbar** or **pop-up menu**:

- Delete** Permanently delete the selected Recipe from your database.
- Help** Open this Help topic.
- Open** Open the selected Recipe
- Refresh** Refresh the list to reflect any recipe changes you have made while this window was open.

## Window stuff and Shortcuts

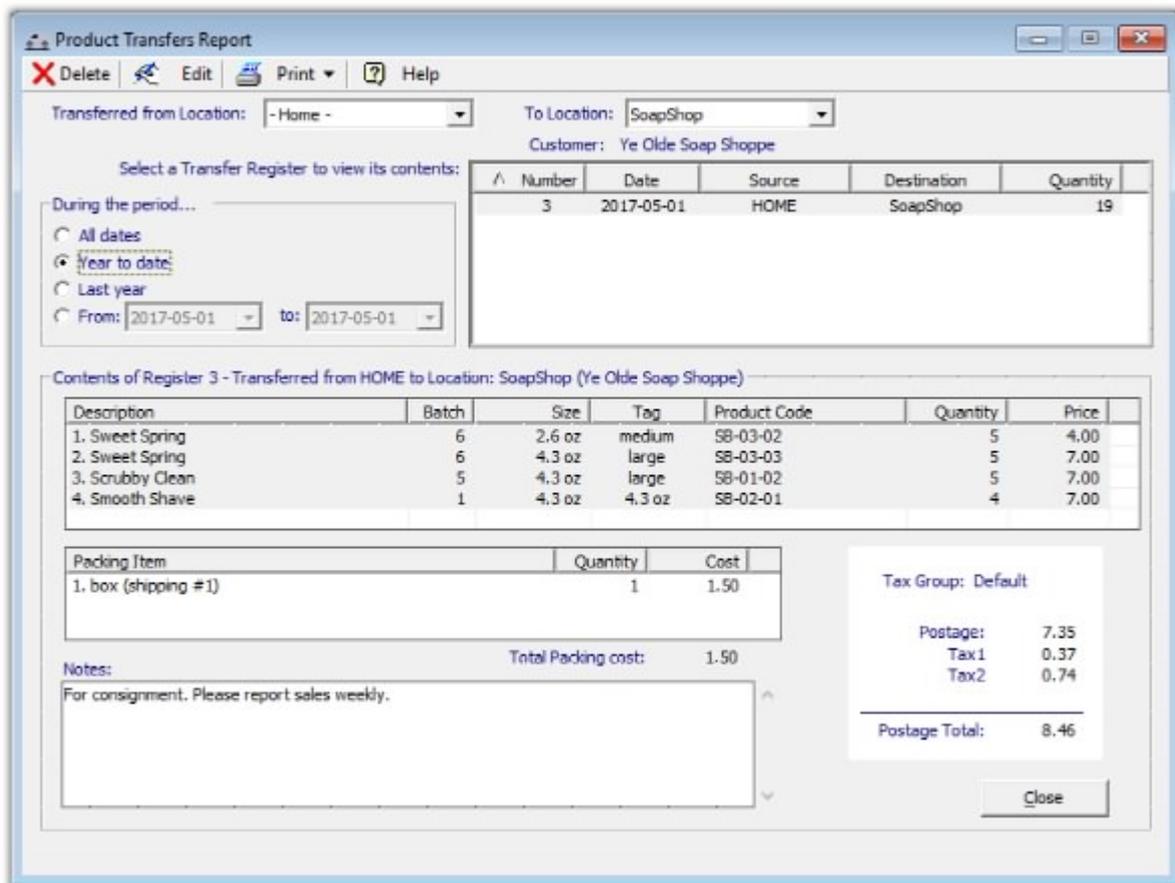
Double-click a Recipe name to open the Recipe.

To close the List Recipes window, click the **X** in the upper right corner, or select **Close Window** from the main **File** menu.

## Product Transfers report

**Pro** The **Product Transfers** report lists all transfers to consignment customers, or between warehouse locations.

To open this report, select it from the main **Reports** menu.



You can choose to show transfers **from** or **to** specific **locations**, and within a specified **date** range. The following commands are available from the **toolbar**, or by **right-clicking** an item in the list of registers:

- Delete** Delete one or several selected transfer registers. If you delete a single one, you have the option to **return** all the product stock to the source destination.
- Edit** This will open the [Transfer Register](#) with the selected item so you can make changes.
- Print** Choose from the drop-down list to print either the list of registers, a transfer register, or a Consignment Invoice to send to your customer with your products.
- Help** Opens this page to get help if you need it.

### Printing a Consignment Invoice

You can print both a **Transfer Register** for your own records, and a **Consignment Invoice** to include with the shipment to your customer.

The invoice can optionally include your suggested **retail prices** (from your Price List) as shown in this example:

## My Fabulous Soap Company

### All Natural Handmade Soap

123 Fourth Street  
Someplace, USA 123456  
(123) 456-7890    www.MyFabulousSoap.com

---

## CONSIGNMENT

Ship to: Ye Olde Soap Shoppe  
987 6th Street  
Someplace, TX  
USA 12345

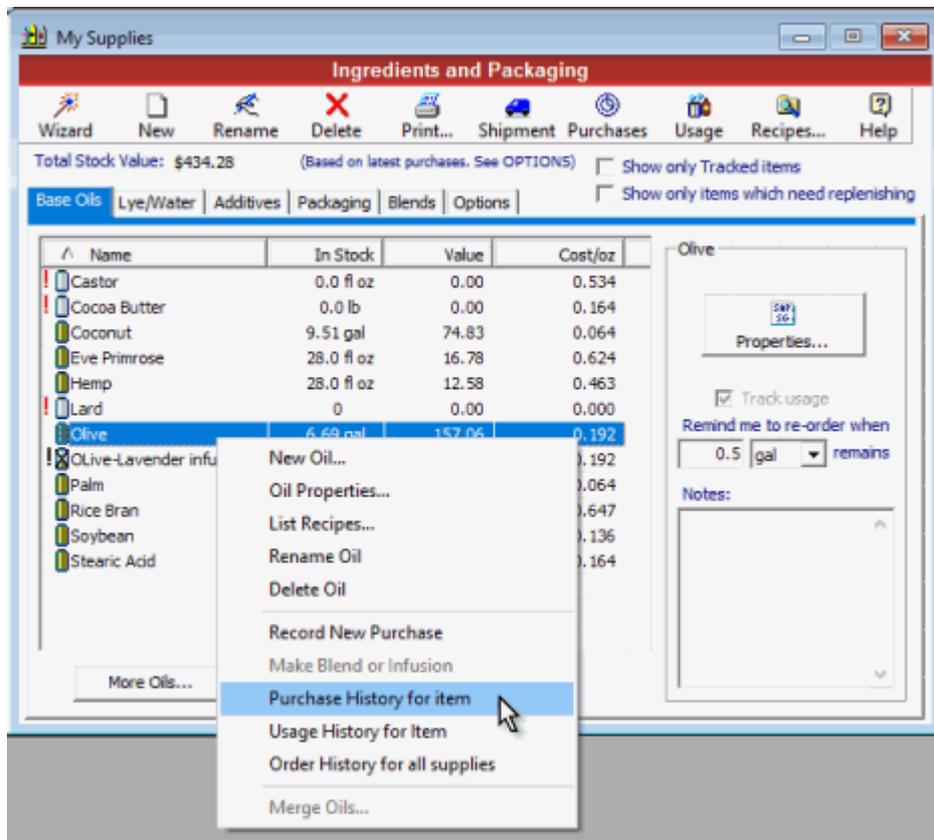
INVOICE # 2                      January 14, 2018

Customer Account # 1  
(Suggested prices shown)

| DESCRIPTION  | CODE     | CLASS  | QUANTITY | EACH |
|--|----------|--------|----------|------|
| 1 Smooth Shave   | SB-02-01 | 4.3 oz | 5        | 7.00 |
| 2 Smooth Shave   | SB-02-02 | 2.6 oz | 10       | 4.00 |
| 3 Sweet Spring   | SB-03-03 | 4.3 oz | 5        | 7.00 |
| 4 Scrubby Clean  | SB-01-01 | 4.3 oz | 12       | 7.00 |
| For consignment.<br>Please report sales weekly.<br>Thanks. |          |        | Total:   | 32   |

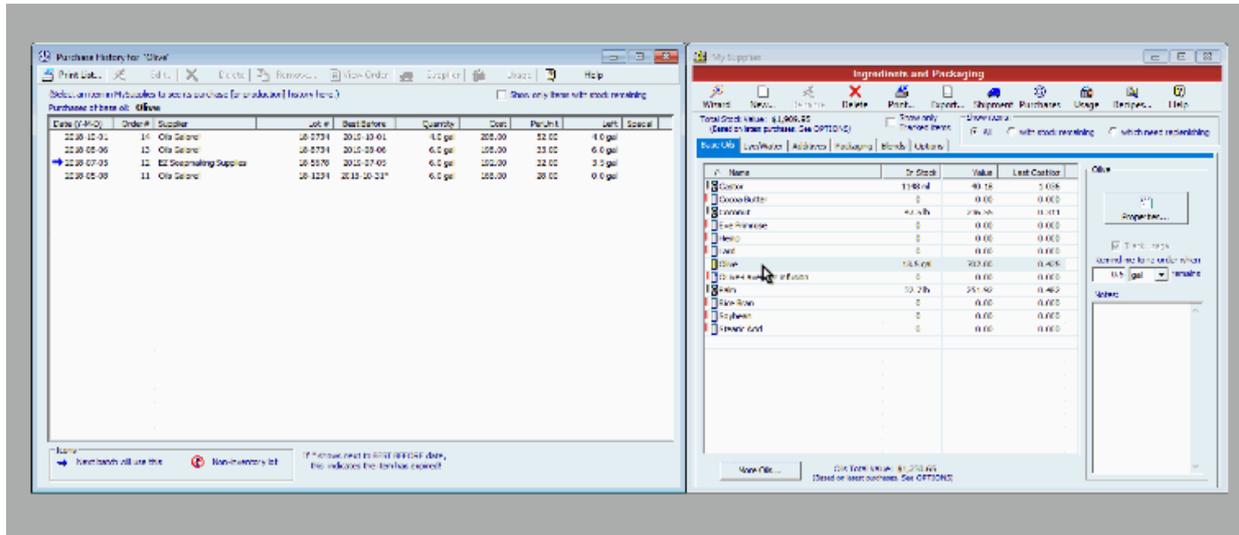
## Purchase History report

### Purchase History (or Blend Production) Report for a Supply Item

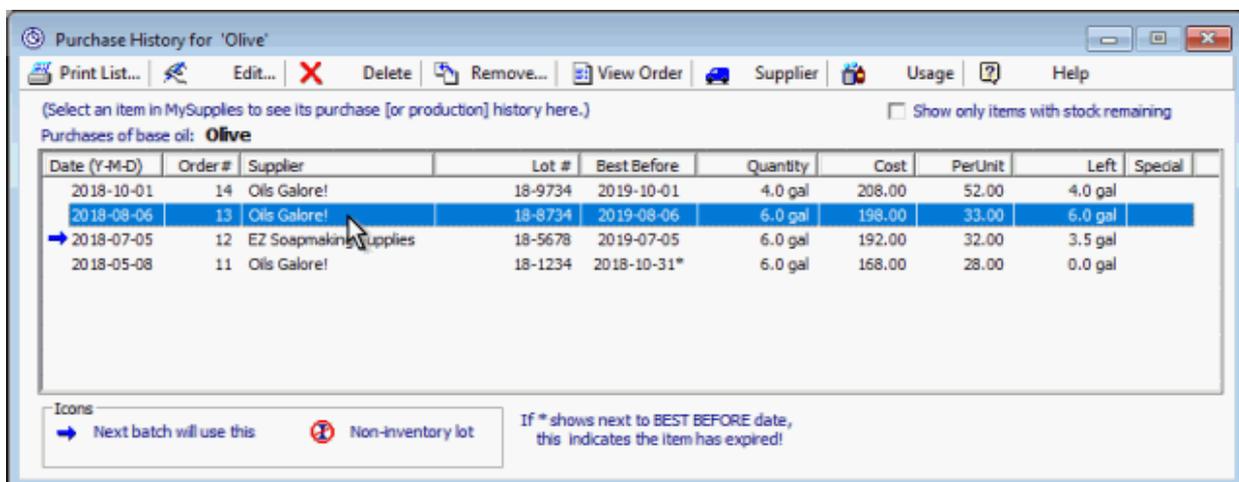


This report shows the **purchase records** for whatever item is selected in the MySupplies stocklist. For your convenience, we suggest the following:

1. Position MySupplies to one side of the main window by dragging its title bar.
2. Make sure the **Wizard** pane is closed (click the **Wizard button** if it is open).
3. Stretch the bottom edge of MySupplies down to show as much of the list as possible
4. Now select an item in the stocklist, and click the **Purchases button** (or right-click the item and choose **Purchase History for item** from the pop-up menu).
5. You can leave the history report open, and select different items in MySupplies to see the associated purchase records.



The **Purchase History** report lists each purchased lot of the selected item, sorted by **date purchased** (most recent at the top). This example shows history for the Base Oil "Olive" which is currently selected in MySupplies.



For each purchased lot, the list shows:

- **Date** purchased
- **Order** number (assigned automatically when you record new purchases)
- **Supplier** name
- Manufacturer **Lot Number**
- **Expiry** date ('Best before'). If this date has passed, it is flagged with an asterisk (\*).
- The **Quantity** purchased
- The **Cost** (adjusted to include shipping, tax, etc.)
- The **Per Unit Cost** for easy comparison between different purchased lots
- **Pro** The quantity **Left** in stock from that purchase. Note: If this supply item is not being [tracked](#), or the

selected purchase record was marked "not for inventory", the quantity left shows **N/A** (not applicable).

- **Special** shows 'Yes' if you flagged this item as a special price when recording the purchase. Even if it's the most recent purchase, it will not affect recipe costs or unit costs shown in MySupplies.

To hide older records which have no stock left, check the box labeled **Show only items with stock remaining**.

### Indicator Icons

Icons at the left side of the list serve as indicators of status indicators:

- ➔ **Pro** Next Batch: The blue arrow in the margin marks the lot from which, by default, inventory will be deducted the next time you [make a batch](#) using this ingredient. This is always the oldest lot which still has remaining stock. However you can select a different lot when recording the batch.
-  Not Inventory: This icon appears in the margin if a purchase record was marked "not for inventory" when the purchase was recorded.

### Blended Ingredients **Pro**

Since you produce your own custom [blended ingredients](#) rather than purchase them, the window title will show **Production History** when a blend is selected. In this case, the report shows the batches you have made using your blend formula. **Lot numbers** for blends are assigned automatically whenever you make a new blend batch.

### Reused Products **Pro**

If you [Reuse](#) products as supply items, they appear in MySupplies and you can view the 'purchase history' - in this case the history of transferring those products into your supply inventory.

The **Order** number will show N/A, the **Supplier** will show 'My: <product name>' and the **Lot number** will be the product Batch number. The **Supplier** button will open MyProducts with the relevant batch selected.

### Commands

The following commands are available from the **toolbar** or **pop-up menu**:

- |                   |  |
|-------------------|--|
| <b>Delete</b>     | Permanently delete the selected purchase record.   |
| <b>Edit</b>       | Enables you to directly change the <b>expiry date</b> , or the <b>quantity left</b> in stock. You can use this when performing an <a href="#">audit</a> . NOTE: You may receive a message warning that changing the quantity left will not leave any record of the change. Instead you can use the <b>Remove Stock</b> feature.<br><br>If the selected ingredient is one of your custom blends, you can change the <b>date</b> it was made.<br><br>If you need to change the <b>quantity purchased</b> , or the <b>lot number</b> , you must edit the original supply order instead. |
| <b>Help</b>       | Opens this Help page.  |
| <b>Print List</b> | Print the displayed list.  |
| <b>Remove</b>     | Remove some stock and keep a record. See topic <a href="#">Removing Supply Stock...</a> Instead of clicking the Remove button, you can double-click a purchase record in the list.   |
| <b>Supplier</b>   | Opens the <a href="#">Supplier List</a> and shows information for the supplier of the selected order. If no supplier was specified when saving the original purchase order, the list will display "unknown" and the Supplier button will be disabled.  |

**Usage** Shows the [Usage Report](#) for the selected ingredient (and the selected lot if any).

**View Order** Opens the [Supply Orders](#) report and displays the contents of the order which includes the selected purchase record..

## Shortcut

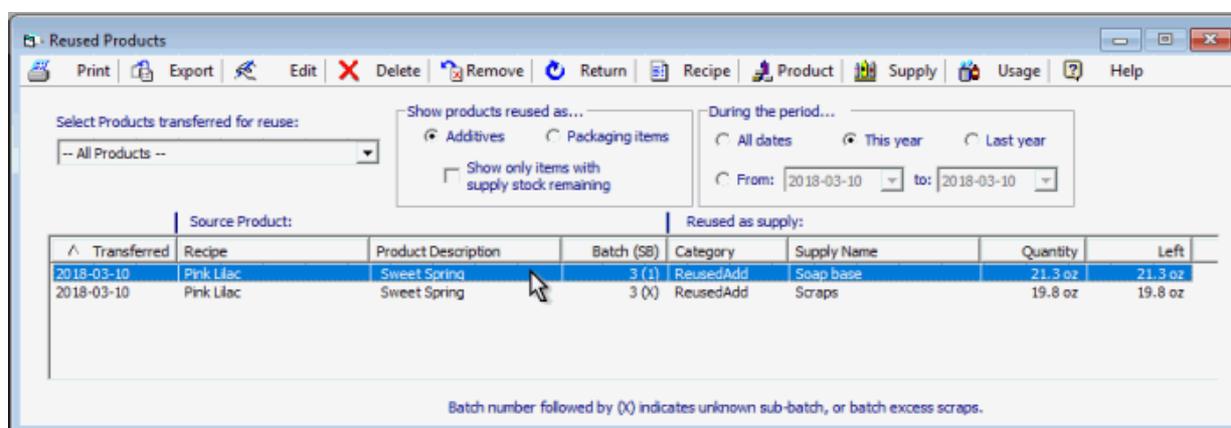
Double-clicking a purchase record will open the [Stock Removal](#) dialog.

## Reused Products report

**Pro** This report lists products you have transferred back to your supplies inventory with the **Reuse** button in [MyProducts](#).

For more information on how or why you would do this, see the topic [Re-using products as ingredients](#).

To open the report, select **Reused Products Report** under the main **Reports** menu, or choose 'Reused Product's from the MyProducts main toolbar **Reports** button menu.



You can set various filters to control what is displayed:

- Select a specific **product**, or all products
- Show products reused as **Additives** or as **Packaging** items
- Select a **date range**, or all dates

The list can be sorted by clicking any column header, and can be Printed, or Exported as a CSV file.

This example shows two products that have been transferred back to supplies as additives.

For each item, the list shows:

- The transfer date
- The Recipe used to make the original product
- The Product Description and Batch number (with the sub-batch shown in parentheses)  
If the sub-batch is unknown, or if the transfer was just excess scraps, the sub-batch will show (X).
- The new supply item Category and Name
- The Quantity transferred, and unused quantity of the transferred material Left in stock

## Commands

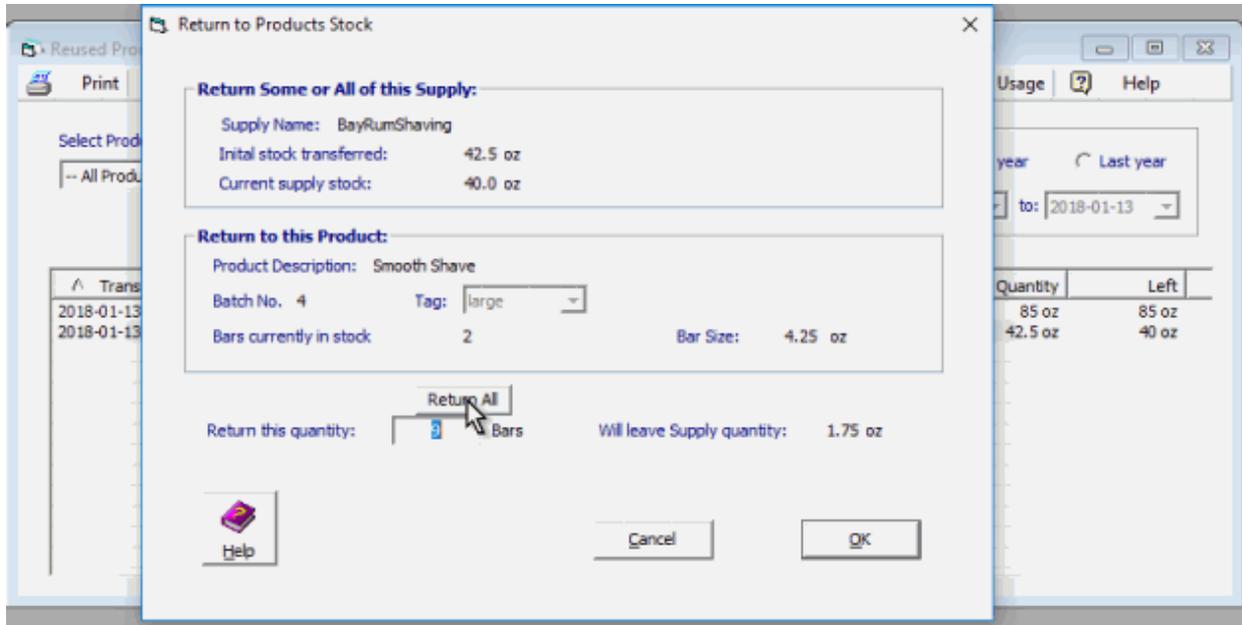
You can perform the following actions for a selected item by clicking a toolbar button, or right-clicking and choosing from the pop-up context menu:

- **Edit** the stock remaining
- **Delete** the item without creating any record
- **Remove** stock and create a record
- **Return** some or all of the item back to your product stock
- View the original **product** batch in MyProducts
- View the **supply** item in MySupplies

- View the **usage** of the selected item to make other products
- Get **Help** (opens this topic)

## Returning Stock

If you decide to return unused stock back to your products inventory, select the item and click the **Return** button, or right-click and choose **Return some to product stock...** from the popup menu. This dialog will open:



It shows the Supply name and quantity remaining in stock which can be returned, as well as the original product description and batch number. (If the product has more than one sub-batch, you may have to select the appropriate Tag if the original transfer was done before version 3.12.)

You can enter the number of bars/portions to be returned, or click **Return All** to return as much as possible. If you have already used some of the supply, the remaining stock may not fit into an integer number of bars/portions, so there may still be some remainder.

When you click **OK**, both supply stock and product stock will be adjusted accordingly. If you return all of the original transferred quantity, you will have the option to also delete the transfer record.

## Related Topics

[MyProducts](#)

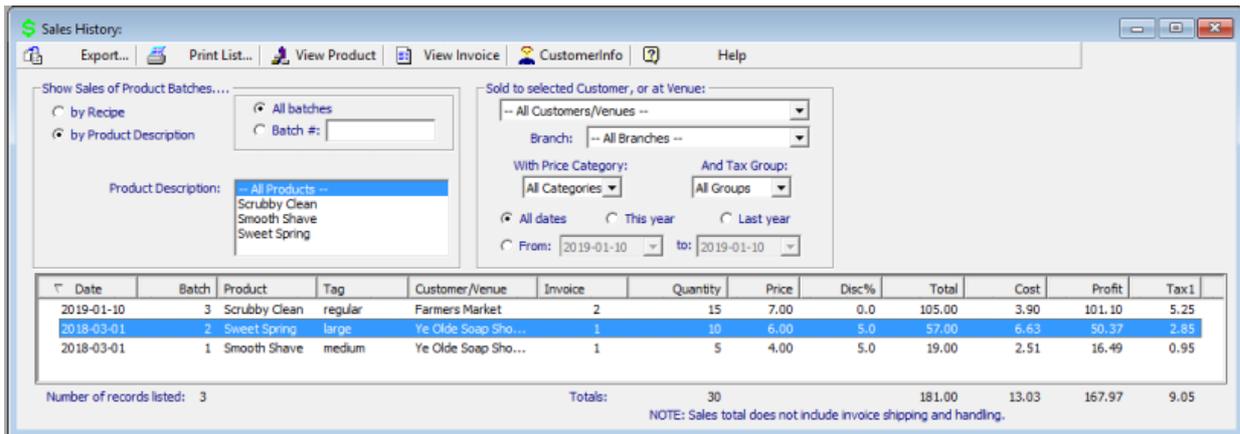
[Re-using products as ingredients](#)

## Sales History report

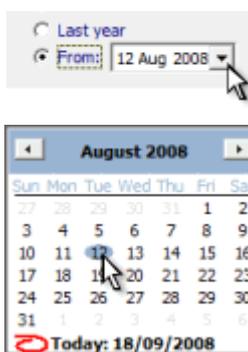
**Pro** This report lists all the sales records for the selected Recipe(s) or Product(s). You can further refine the search by selecting a particular **batch number**, **customer** or **date range**.

To open the report, select **Sales History** under the main **Reports** menu.

You can also open it from MyProducts by selecting a particular Batch record and clicking the **Reports/History** button on the toolbar, or from the supply [Usage History report](#) by clicking the **View Sales** button. This will open the report and show all sales of products from the selected Batch.



You can select a specific **recipe** or recipe **group**, or a specific **Product Description**.



The list can be filtered by **Customer/Venue** and **Branch**, as well as by **Price Category** and **Tax Group**.

You can choose any date range desired; to enter specific dates, open the drop-down calendar and then select the desired month and date.

For each sales record, the list shows:

- Date sold
- Batch number
- Recipe or Product name (You can choose which to show)
- Product Tag
- Customer or venue name
- Your Invoice number
- The quantity sold
- Your Unit Price
- Customer discount percent
- The Total Price
- Your Profit (Price minus Cost)
- The Cost of the products based on the adjusted costs of each supply lot used to make them
- Sales Tax (The tax columns will be visible only if there is tax to show. for more information, see the topic [Sales Tax](#))

At the bottom of the window are totals for quantity and currency columns.

NOTE: Product costs only include materials costs - they do not include any labor costs you included on the recipe Labor tab.

The sales total does not include invoice shipping and handling charges.

You can sort the list by clicking on any column header. Click again to sort in reverse order. In the example above, the list is sorted by Date in descending order (most recent sale at the top).

## Commands

The following commands are available from the **toolbar** or **pop-up menu**:

|                      |  |
|----------------------|--|
| <b>Export</b>        | Saves the list as a CSV file that can be opened in a spreadsheet program. For more information on export format, see the topic <a href="#">Exporting reports</a> . |
| <b>Print List</b>    | Print the displayed list.  |
| <b>View Product</b>  | Shows MyProducts with the relevant batch selected  |
| <b>View Invoice</b>  | Opens the <a href="#">Sales Registers/Invoices</a> report and displays the contents of the invoice which includes the selected sales record..                      |
| <b>Customer Info</b> | Opens the <a href="#">Customer List</a> and highlights the customer to whom the selected sale was made..   |
| <b>Help</b>          | Open this Help topic.  |

## Window stuff and Shortcuts

Double-clicking a sales record does the same as selecting it and clicking **View Invoice**.

You can stretch the window larger by dragging an edge or corner.

To close the Sales History window, click the **X** in the upper right corner, or select **Close Window** from the main **File** menu.

## Sales Registers/Invoices report

**Pro** This report lists all your **customer invoices**, and sales registers from **venue sales**.

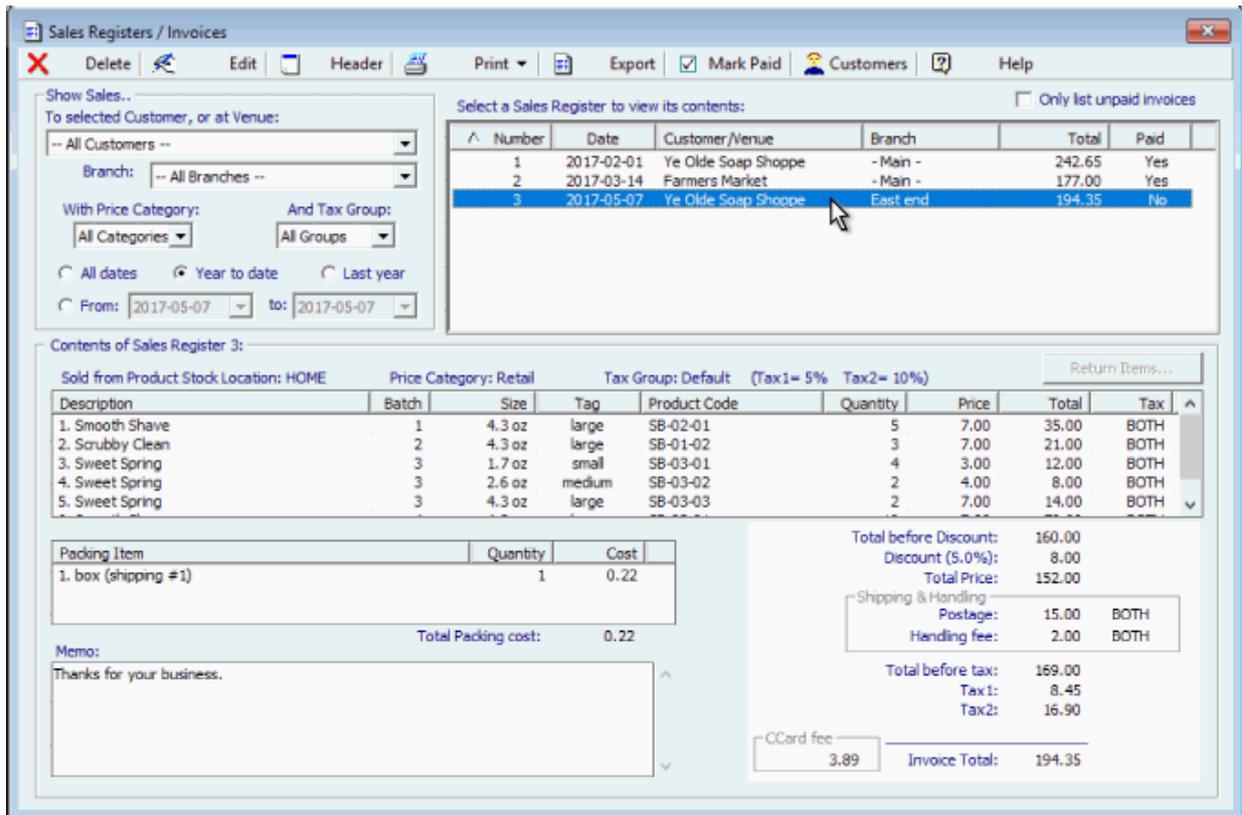
To open the report, select **Invoices and Venue Sales Records** under the main **Reports** menu, or in MyProducts, click the **Invoices** button on the toolbar.

You can choose to display all invoices and sales registers, or only **unpaid** invoices.

The report can be filtered further by choosing a particular:

- **Customer** and **Branch**
- **Price Category** (e.g. wholesale or retail)
- **Tax Group** (you can use this to filter by sales region)
- **Date Range**

The list can be sorted by clicking any column header. Click again to sort in reverse order. This example shows invoice number 3 selected. The contents of the invoice are shown at the bottom.

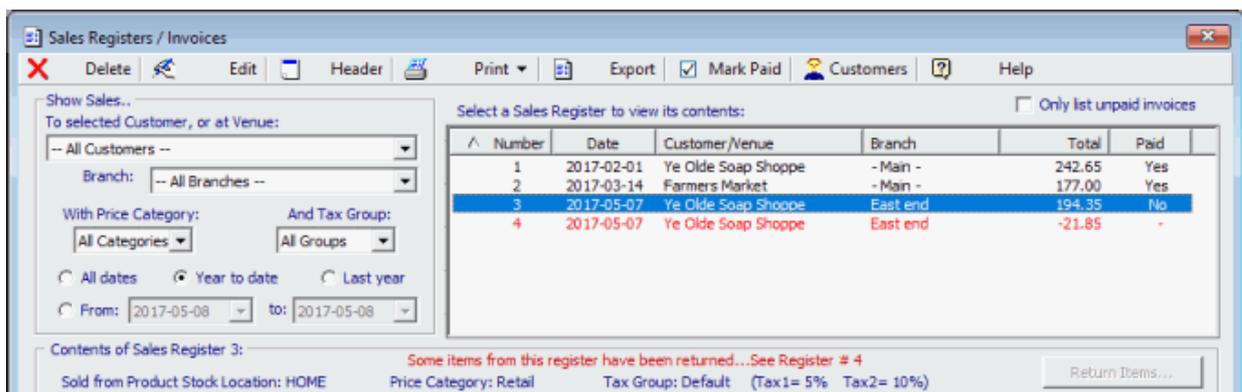


To view a different invoice's content, select it from the list.

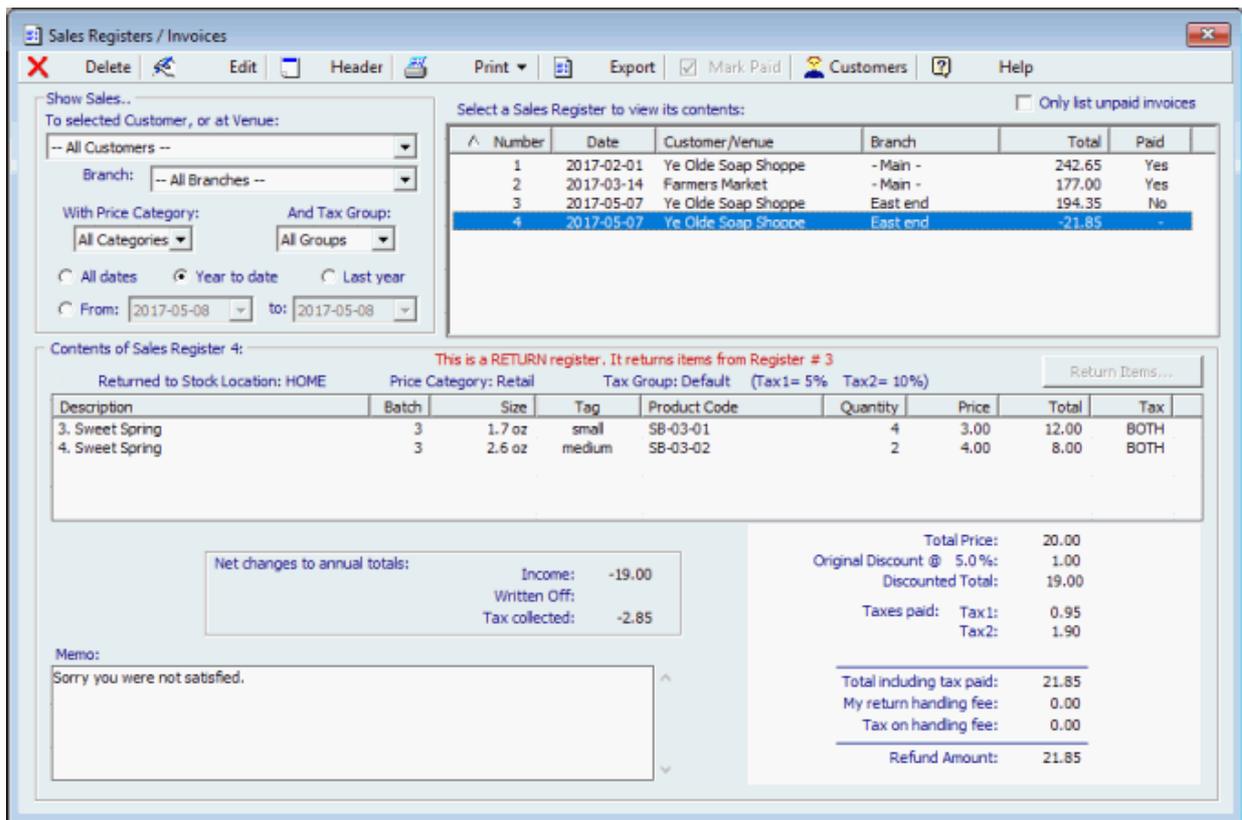
## Returned Products

When you record [product returns](#), the original sales register is flagged with a notice saying **Some items have been returned... See Register # xx**.

Return registers are shown in the list in **red**, with negative Total amount as shown for number 4 in this example:



The details at the bottom of the report are different for **return registers** - there is no packaging area, and there is a box showing net changes to annual total business amounts as shown on the [Tax and Income Summary report](#):



Instead of an invoice, you can print a **credit statement** to send to your customer. For more information, see the topic [Product Returns...](#)

## Commands

The following commands are available from the **toolbar** or **pop-up menu**:

- Delete** Delete the selected sales register(s). If you delete a single register, you have the option to restore all of its listed products to your inventory.
- Edit** Open the [Sales Register](#) to make changes. If you then change the quantities of any products listed, the changes will be reflected in your inventory as shown in MyProducts. As a shortcut, you can double-click the register to edit it.
- Header** Edit your company name and address which will be printed on invoice headers, or add a custom image with your company logo. See [Invoice Header...](#)
- Print** Print the selected sales register, or the list of sales registers. When you print a specific sales register, you have the option to print as:
  - an **invoice** to be sent to your customer,
  - a waybill or shipping list, or
  - a register format more suited to recording sales from a venue.
- Export** You can either:
  - Export the selected invoice as a text file that can be edited in a word-processor
  - Export the list as CSV file that can be opened with a spreadsheet
- Mark Paid** Mark the selected invoice as paid (or change to unpaid if already marked paid).
- Help** Open this Help topic.

## Printing

For information about printing sales registers or customer invoices, see the topic [Printing a Customer Invoice...](#)

## Viewing Tips

Hover your mouse cursor over a label to see a brief description.

When viewing a long order, you can stretch the window taller by dragging the bottom or top edge vertically.

## Related Topics

[MyProducts](#) - Product stocklists

[Customer List](#)

[Recording Product Sales](#) - Creating a sales register or invoice

[Product Returns](#) - Recording returns from your customers

[Sales History Report](#)

[Sales Tax](#) - Setting up and using SoapMaker's Tax features

[Invoice Header](#) - Customize your printed invoice headers

[Invoice Language](#) - Select your preferred language, or define a new one.

## Stock Removed report

**Pro** The **Stock Removed** report lists all supply items and products you have removed, showing the **purpose** of each removal.

Select **Supplies** or **Products** and the **date range**. You can also select a specific purpose from the drop-down list, or select All Purposes.

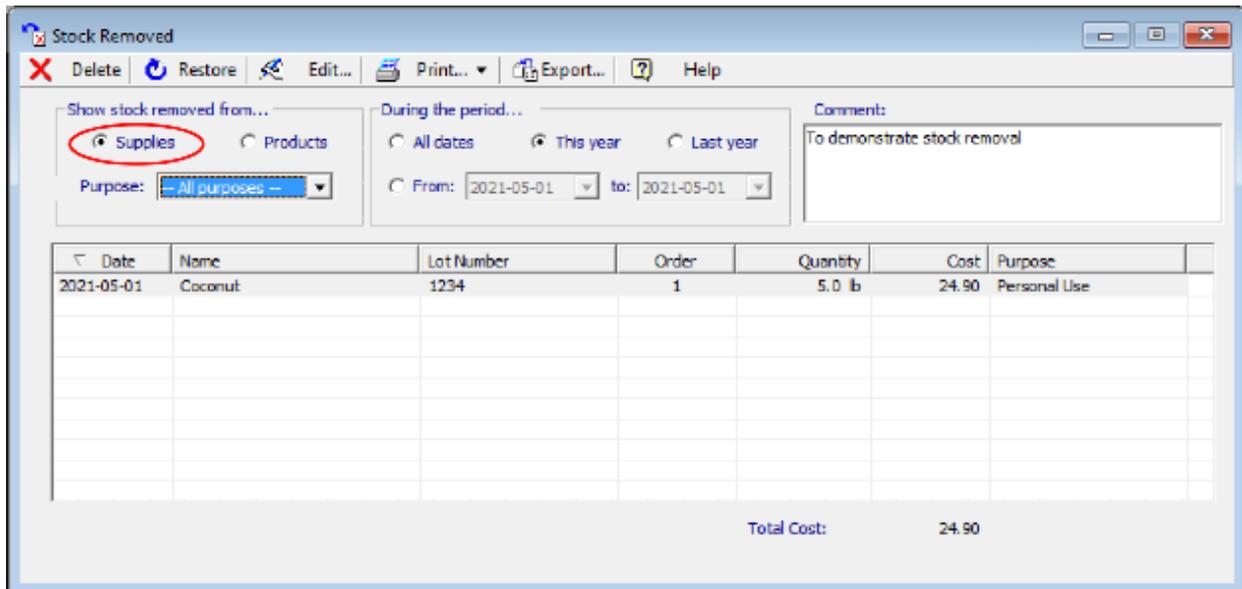
The **Supplies** view shows:

- **date** of removal
- the **name** of the supply item
- the **lot number**
- the **order number** of the original purchase
- the **quantity**, and **cost** of this amount
- the **purpose** you selected for the removal

Note: If the removed supply stock was from a reused product, rather than a purchase, the order number will show 'reused'.

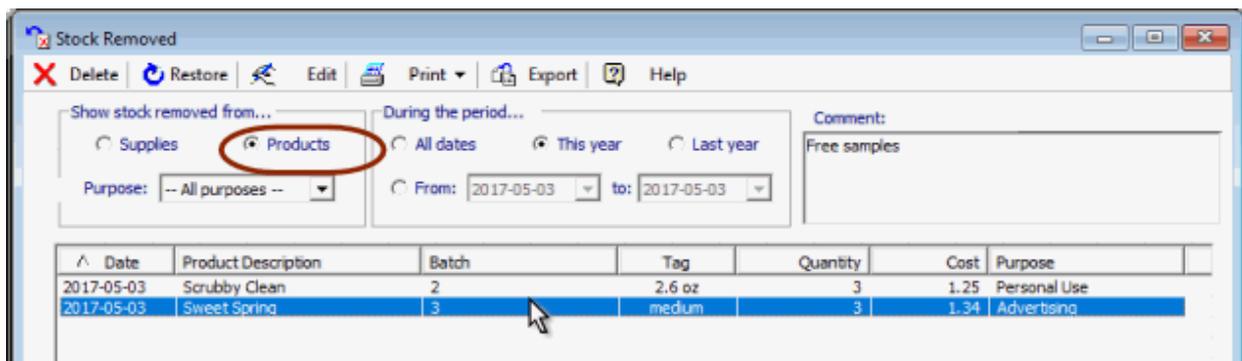
When you select an item from the list, you can see any **comment** you saved. If desired you can edit the comment here.

At the bottom, you can see the **total cost** of the items listed.



The **Products** view shows:

- Product **Description**
- **Batch** number
- Sub-batch **Tag**



The following commands are available from the toolbar, or by right-clicking an item in the list:

- Delete** Delete the selected record without restoring stock
- Restore** Delete the record and restore the stock to your inventory
- Edit** Change the Date, Purpose or Comment for the selected record
- Print** Print the current **list**, or select an item and print a **receipt** for donation
- Export** Export the current list as a CSV file that can be opened in a spreadsheet
- Help** Show this topic

**Edit Stock Removed record:**

You can change the Date, Purpose or Comment.  
If you need to change the quantity removed, RESTORE this record, then REMOVE what you need in MyProducts.

Product Description: Smooth Shave

Batch number: 1

Date Removed: 2018-03-13

Purpose: Advertising

Comment:  
comment goes here.

Cancel Save

## Edit Record

If you need to change the Date, Purpose or Comment for a record, select it and click the **Edit** button on the toolbar, or right-click it and choose **Edit** from the popup menu.

The **Edit Stock Removed** dialog will open, and you can select a different date or purpose, or edit the comment.

Click the **Save** button to save the changes.

Note: you cannot change the quantity removed from stock. If you need to do this, use the **Restore** button to restore the current quantity to your inventory, then use the **Remove Stock** feature again to remove the desired quantity.

## Related Topics:

[Removing Stock](#) - remove stock from your Supplies or Products inventory and account for it.

[Tax and Income Summary report](#) - shows total costs for each stock removal purpose.

## Supply Lots Used in Batch

**Pro** This report lists all the **supply lots** used to make a particular product **batch**.

To open the report, select a batch in MyProducts and click **Reports/Supply Lots Used** on the toolbar, or right-click the batch and choose 'Supply lots used for this batch' from the popup menu.

You can also open it by choosing **Supply Lots Used** under the main **Reports** menu.

For each ingredient used to make the selected batch, the report lists:

- Category
- Name
- Supplier
- Manufacturer's Lot number (if recorded with the original purchase)
- Quantity used for this batch (in **Calculated Weight Units** as specified in [MyPreferences](#) for this recipe type)
- Percent of the recipe total
- Purchase date
- Cost of the amount used for this batch

The total cost for the batch is shown at the bottom.

Batch No: 3      Product Description: Scrubby Clean      Made: 2018-11-13      (Quantities in Batch Portion units)  
 Recipe: Oatmeal Exfoliating (Solid Soap)

| Category  | Name        | Supplier               | Lot # | Quantity (oz) | %    | PurchaseDate | Cost  |
|-----------|-------------|------------------------|-------|---------------|------|--------------|-------|
| BaseOil   | Lard        | Oils Galore!           | 3872  | 40.00         | 32.7 | 2018-11-13   | 12.38 |
| BaseOil   | Olive       | Oils Galore!           | 56462 | 20.00         | 16.4 | 2018-11-13   | 7.11  |
| BaseOil   | Coconut     | Oils Galore!           | 1234  | 20.00         | 16.4 | 2018-01-04   | 6.23  |
| Lye/Water | Lye (NaOH)  | EZ Soapmaking Supplies | 11234 | 11.11         | 9.1  | 2018-11-13   | 2.99  |
| EO        | Rosemary EO | Up Your Nose Aromas    | 3324  | 2.50          | 2.0  | 2018-11-13   | 3.86  |
| Misc      | Oatmeal     | Local grocery store    |       | 1.15          | 0.9  | 2018-11-13   | 0.06  |

| Category | Name               | Supplier               | Lot # | Items | PurchaseDate | Cost |
|----------|--------------------|------------------------|-------|-------|--------------|------|
| Wrappers | Wrapper (soap bar) | EZ Soapmaking Supplies |       | 27    | 2018-11-13   | 2.70 |
| Labels   | Label (soap bar)   | EZ Soapmaking Supplies |       | 27    | 2018-11-13   | 3.24 |

Ingredients are not shown if they were not Tracked or had no stock when batch was made.      Total cost: 38.56

To see the report for a different batch, either type the **Batch Number**, or select a different batch in MyProducts.

The report can be printed, or exported to a spreadsheet. (For more information on export format, see the topic [Exporting reports.](#))

To examine the original purchase information, select an item and click the **View Supply Stock** button on the toolbar - this will open MySupplies and the [Purchase History report](#) for the selected item. From there you can select the particular supply lot and view the original order or supplier information.

You can move the boundary between the **Ingredients** and **Packaging** lists by dragging the divider vertically.

If names are too long to be displayed completely, you can widen the window by dragging an edge.

## Blends

If the batch included a blended ingredient, the component ingredients are shown in blue after the main blend entry.

## Please Note:

Any ingredients or packaging items which were not being [tracked](#) in MyProducts, were unchecked in the New Batch Dialog, or which had no stock remaining when the batch was recorded, will **not** be shown in the list. Percentages may not total 100.

If water or water-substitute additives are included in the list, their quantities match the recipe and do not reflect batch shrinkage during cure.

## Supply Orders

This report lists all your **supply** shipments and other **expenses**.

To open the report, select **Supply Orders Report** under the main **Reports** menu. It will open with your most recent order highlighted.

You can also open it from the [Purchase History report](#) by selecting a particular purchase record and

clicking the toolbar **View Order** button. This will open the report and highlight the order containing the selected purchase item.

You can specify the **date range** of orders to display, and specify a particular **supplier**. You can also enter a specific **invoice** number to show only that particular order. The list of orders can be **sorted** by clicking the appropriate column header.

For each order, the list shows the:

- Order **Date**
- **Supplier** name
- **Invoice** number
- Total order **amount**

This example shows the list of orders sorted by Order Number, with order number 5 selected. The contents of the selected order are shown in the lower lists.

The screenshot shows the 'Supply Orders' window. At the top, there is a toolbar with buttons for 'Delete Order(s)', 'Edit Notes', 'Edit Content', 'Repeat', 'Print', 'Supplier Info', and 'Help'. Below the toolbar, there are filters for 'Show Orders' (From: --All Suppliers--, Invoice #: [input], All dates, This year, Last year, From: 2016-10-21 to: 2016-10-21) and 'Order received from: Up Your Nose Aromas, Invoice #: 16-02-3456'. The main area displays a table of orders:

| Order | Date       | Supplier               | Invoice     | Amount |
|-------|------------|------------------------|-------------|--------|
| 1     | 2016-02-01 | Oils Galore!           | 16-000234   | 538.00 |
| 2     | 2016-02-03 | Up Your Nose Aromas    | 16-02-3456  | 166.90 |
| 3     | 2016-02-04 | Local grocery store    |             | 22.44  |
| 4     | 2016-02-05 | EZ Soapmaking Supplies | 16-02-0234  | 266.45 |
| 5     | 2016-02-08 | EZ Soapmaking Supplies | 16-02-00456 | 377.94 |
| 7     | 2016-02-15 | Local grocery store    |             | 25.00  |
| 8     | 2016-01-20 | EZ Soapmaking Supplies | 16-0138497  | 343.00 |
| 9     | 2016-10-21 | EZ Soapmaking Supplies | 16-02-0234  | -23.10 |

Below the orders list, the 'Contents of Order 2:' section is visible. It includes a 'Return Items' button and a table for 'Materials and Packaging':

| Name                | Lot #        | Expiry     | Quantity   | Price | Adj. Cost | Inventory |
|---------------------|--------------|------------|------------|-------|-----------|-----------|
| 1. Pink Pigment     | SMS 15-00495 |            | 10.0 oz    | 9.95  | 10.72     | Yes       |
| 2. Ultramarine Blue | SMS 15-00596 |            | 10.0 oz    | 9.95  | 10.72     | Yes       |
| 3. Clary Sage EO    | ULS 153948   | 2017-03-15 | 48.0 fl oz | 25.00 | 26.94     | Yes       |
| 4. Lavender EO      | ULS 159874   | 2017-03-15 | 48.0 fl oz | 25.00 | 26.94     | Yes       |
| 5. Patchouli EO     | ULS 152346   | 2017-03-15 | 48.0 fl oz | 22.00 | 23.70     | Yes       |
| 6. Rosemary EO      | ULS 159873   | 2017-04-20 | 48.0 fl oz | 27.00 | 29.09     | Yes       |
| 7. Bay Rum FO       | SFU 16389    | 2017-09-20 | 32.0 fl oz | 18.00 | 19.39     | Yes       |
| 8. Llac FO          | SFU 16234    | 2017-09-20 | 32.0 fl oz | 18.00 | 19.39     | Yes       |

At the bottom left, there is a summary of costs:

|                         |         |
|-------------------------|---------|
| Materials total price:  | 154.90  |
| Other Expenses total:   | 0.00    |
| Total Price:            | 154.90  |
| Less Supplier Discount: | 0.00    |
| Shipping:               | 12.00 * |
| Other overhead costs:   | 0.00 *  |
| Amount Billed:          | 166.90  |
| Exchange rate:          | 1.0     |
| Amount in my currency:  | 166.90  |
| Tax1 (saved as credit): | 8.35    |
| Tax2 (saved as credit): | 16.69   |
| Customs/Brokerage:      | 0.00 *  |
| Total Business Cost:    | 166.90  |

At the bottom right, there is a 'Notes' section with the text: 'Initial order of all my scents and colors.' and buttons for 'Edit Notes', 'Cancel Edit', 'Save Notes', 'Help with Overheads', and 'Close'. A note at the bottom states: '\* Overheads have been distributed proportionally and included in each item's adjusted cost'.

Notice that the example order contains both **Materials and Packaging** items and **Other Expense** items. If both types of purchases are not included in a selected order, only the appropriate list area will appear. If your screen is too small to show both lists, one will be shown, and a button above the list will enable you to view the other list.

The list of orders can be sorted by clicking a column header. To view a different order's **content**, select it from the list.

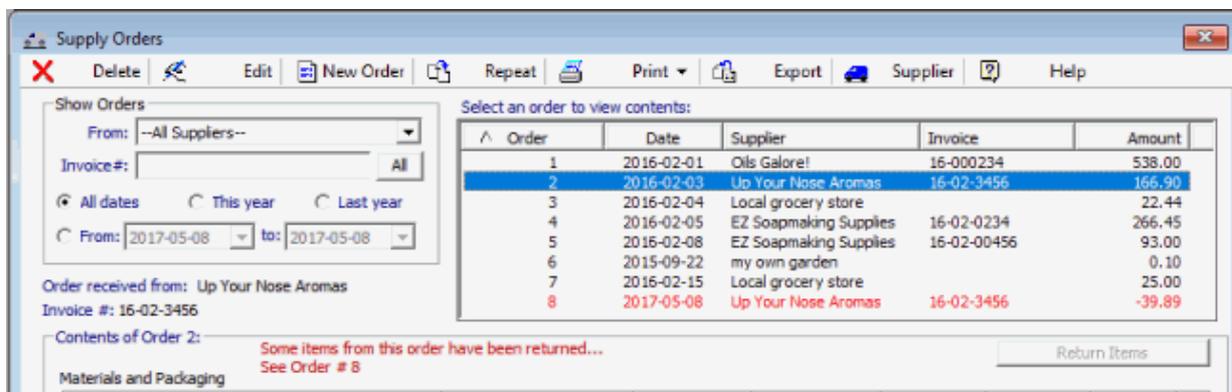
### Overhead Costs

The lower left section lists the totals, including overhead costs such as shipping. Depending on the option used when the order was saved, overheads marked with \* may be either distributed proportionally to each item's adjusted cost, or just shown separately in the **Pro Tax and Income Summary report**. For more

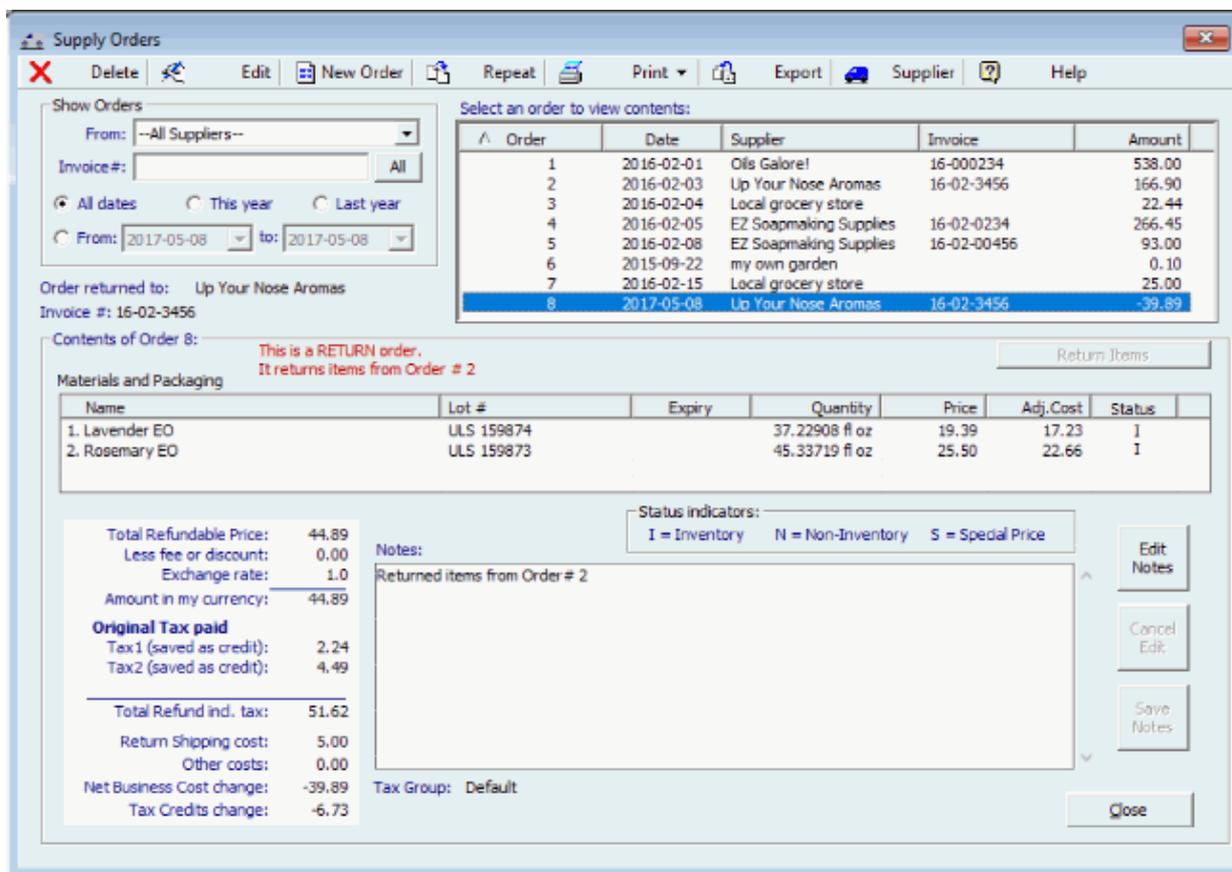
information about this, click the **Help with Overheads** button to see the topic [Overhead Costs](#).

## Returned Supplies

If you have recorded return of some items from an order, it will be flagged with a note saying **Some items from this order have been returned...**



Return orders are shown in **red** with a negative amount. If you select one, you can see that the details are different from a regular purchase order...

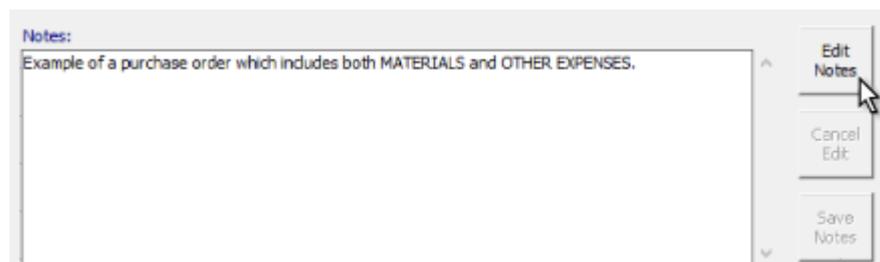


## Commands

The following commands are available from the **toolbar** or **pop-up menu**, or from other buttons on the form:

**Delete** Delete the selected order(s). You can select multiple orders for deletion using Shift-Click or Ctrl-Click.

**Edit Notes** Edit just the **Notes** area of the selected order. After making changes, click the **Save Notes** button to keep your changes.



- Edit** Edit the **contents** of the selected order. This will open the [New Supply Purchase](#) form with all the contents of the order so you can correct any errors made when first creating the order. (Note that the number of containers and container size is no longer known - only the total quantity of each item from the original order will be shown.)  
**Note:** When you edit a previous order, any changes could affect the adjusted costs of all items in the order because overhead costs are distributed proportionally. But if you have already saved batches made with any of the items in the order, their costs will not be adjusted to match.  
 The Edit command is not available for return orders.
- New Order** This will open the [New Supply Purchase or Expense form](#) so you can record a new order.
- Repeat** This creates a new order with the same content as the selected one, and opens the new order for editing.  
 The Repeat command is not available for return orders.
- Return Item(s)** **Pro** You can create a **Return order** by selecting one or more items and clicking the **Return Item(s)** button, or right clicking and choosing from the pop-up menu. Return orders are shown in **red** in the orders list.  
 For more information, see the topic [Return Supply Items](#).
- Print** You can print either the **list of orders**, or the contents of a **selected order**.
- Export** Export the displayed list of orders as a CSV file that can be opened with a spreadsheet. All values are exported including totals and taxes.
- Supplier** Opens the [Suppliers List](#) and displays the supplier of this order
- Help** Open this Help topic.

When done, click the **Close** button.

## Window stuff and Shortcuts

Hover your mouse cursor over a label to see a brief description.

When viewing a long order, you can stretch the window taller by dragging the bottom or top edge vertically.

Double-click an order in the list to edit it.

Use the keyboard **up/down arrows** to select a different supply order.

Press the **Esc** key to close the window.

## Related Topics

[MySupplies](#) - Supply stocklists

[Sales Tax](#) - Setting up and using SoapMaker's Tax features

[Suppliers List](#) - Name and contact information for all your suppliers

[Purchase History Report](#) - List of purchases for a selected supply item

[Recording Purchases](#) - The New Supply Purchase Form

[List of All Purchases](#) - Lists individual purchased items

[Return Supplies](#) - Return one or more items to supplier

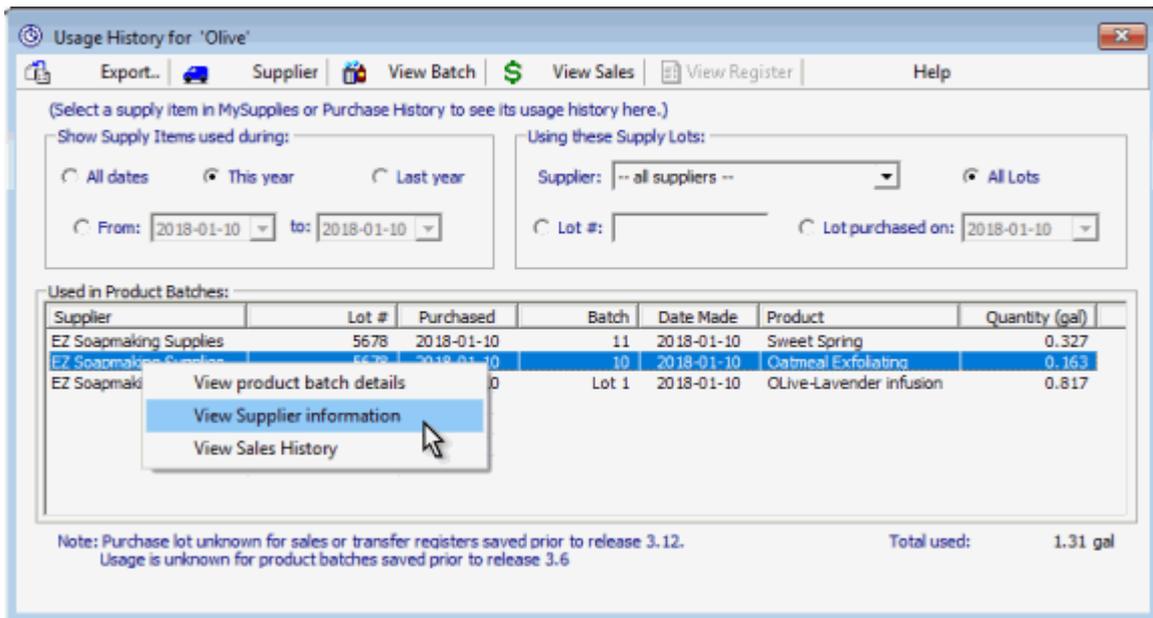
## Supply Usage

### Pro Usage History for Supply item

This report lists all the **product batches** you have made using a particular ingredient or packaging item, and for packaging items, any sales registers or transfers where the item was used for **shipping**.

To open the report, select a supply item in MySupplies, and Click the **Usage** button on the toolbar, or right-click the item and choose **Usage History for Item** from the pop-up menu. You can also open it from the [Purchase History](#) report or the [Reused Products](#) report.

### Product Batches



The example above shows usage history for the Base Oil "Olive" showing batches made this year, using Olive oil purchased from any supplier. Note the third item listed, which is a batch of **custom blended** ingredient, rather than a purchased one. In this case, instead of a batch number, it shows the **Lot number** that was assigned when the blend batch was made.

For each product batch the list shows:

- The **Supplier** from whom the ingredient was purchased
- The **Lot Number** and **Purchase Date**
- Your product **Batch** number
- **Date** the batch was made
- The **Product Descriptive name**
- The **Quantity** of the selected supply item used in the batch (in the same units as specified when purchased)

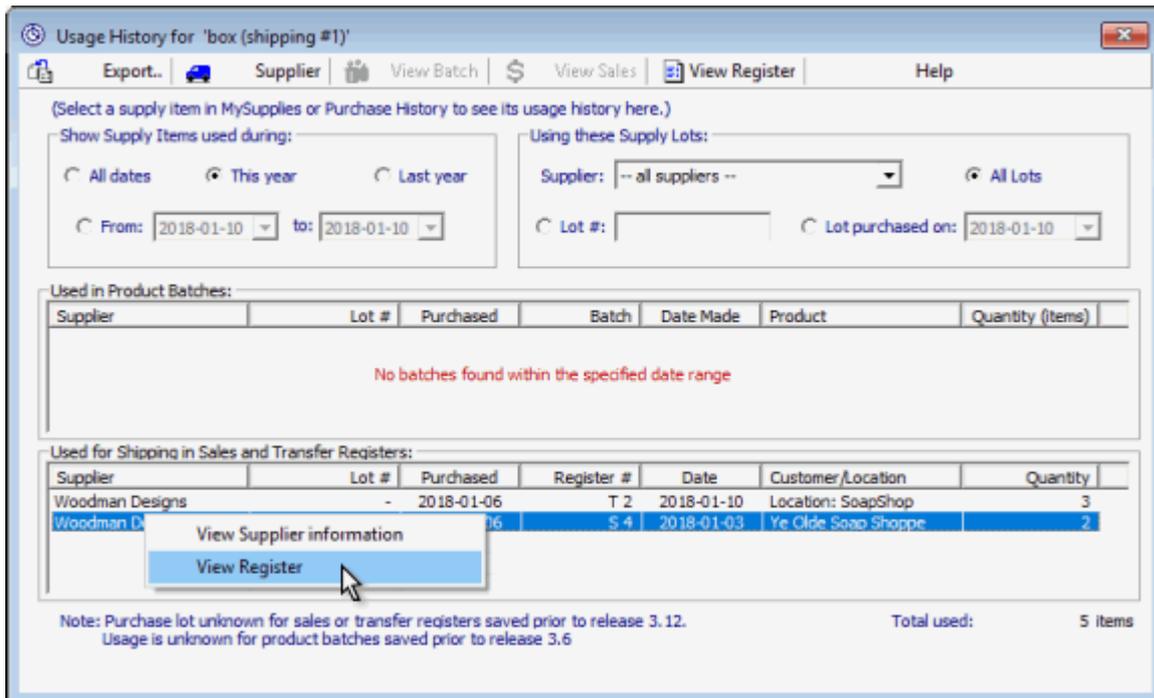
The list is sorted by Date (most recent at the top). At the bottom is shown the **total quantity** used in the listed batches.

By selecting an item, you can then use the **Toolbar** buttons, or right-click for a **menu** to view the product batch, supplier information, or sales history for this batch.

Note: Batches recorded prior to version 3.6.0 (released May 2013) did not include a record of supply lots used, and cannot be displayed.

### Packaging used for Shipping

For **packaging** items, the report also shows lots that were used for shipping on [Sales Registers](#) or [Transfer Registers](#):



In this example, the packaging item 'box (shipping #1)' was used as part of **product transfer** to the customer location 'SoapShop' (indicated by the **T** prefix on the register number), and as part of a **sales invoice** sent to the customer 'Ye Olde Soap Shoppe' (indicated by the **S** prefix).

For each sales or transfer register the list shows:

- The **Supplier** from whom the packaging item was purchased
- The **Lot Number** if any, and **Purchase Date**
- The **Register** number (with prefix **S** for sales, or **T** for transfer)
- **Date** of the sale or transfer
- The **Customer Name** for sales, or **Location Code** for transfers
- The **Quantity** of the selected packaging item used for shipping

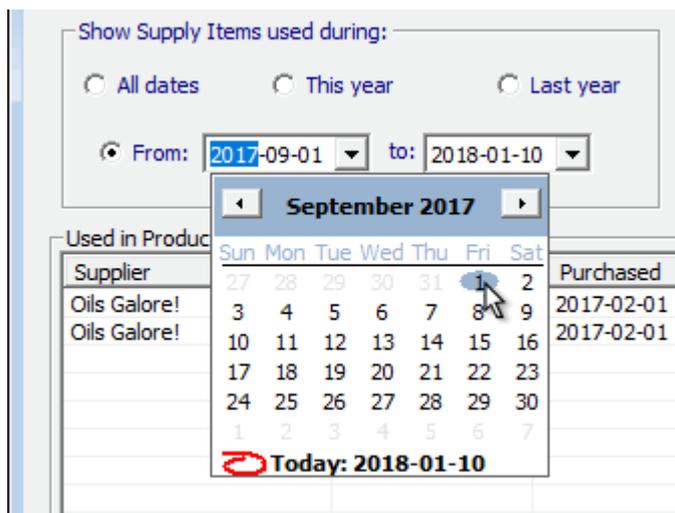
The list is sorted by Date (most recent at the top). At the bottom is shown the **total quantity** used in the listed registers.

With a shipping item selected, you can view the related sale or transfer register by clicking the **View Register** button on the Toolbar, or right-clicking and choosing **View Register** from the pop-up menu.

Note: Sales or Transfers recorded prior to version 3.12.0 (released January 2018) did not include a record of supply lots used, so list items will show lot number 'unknown' and may represent more than one purchase.

## Filters

You can choose to limit the display to a particular **date range**, a single **supplier**, or even a particular **Lot number** or **purchase date**.



You can choose to view only supply lots used within a selected date range.

To enter specific dates, open the drop-down calendar and select the desired month and date.

The Toolbar provides the following commands:

- Export** Export the displayed list as a CSV file that can be opened in a spreadsheet. For more information on export format, see the topic [Exporting reports](#).
- Supplier** Opens the [Supplier List](#) and shows information for the supplier of the lot used for the selected batch.
- View Batch** Opens MyProducts and displays the selected batch details
- View Sales** Opens the [Sales History](#) report and lists the customer invoices which included products from the selected batch.
- View Register** For packaging items used for shipping, opens the [Sales Registers/Invoices report](#), or [Product Transfers report](#) with the related register highlighted.
- Help** Opens this Help page

**Note:** The Usage Report relies on records associated with the individual ingredient purchase records (as shown in the [Purchase History](#) reports) and the batch records (as shown in [MyProducts](#)). If you delete either of these, the usage history for those elements will no longer be available.

## Window stuff

When you first open the Usage History window, SoapMaker attempts to position it next to MySupplies without overlapping. If necessary, you can move either MySupplies or Usage History by dragging its window top. You can resize either window by dragging a corner or edge.

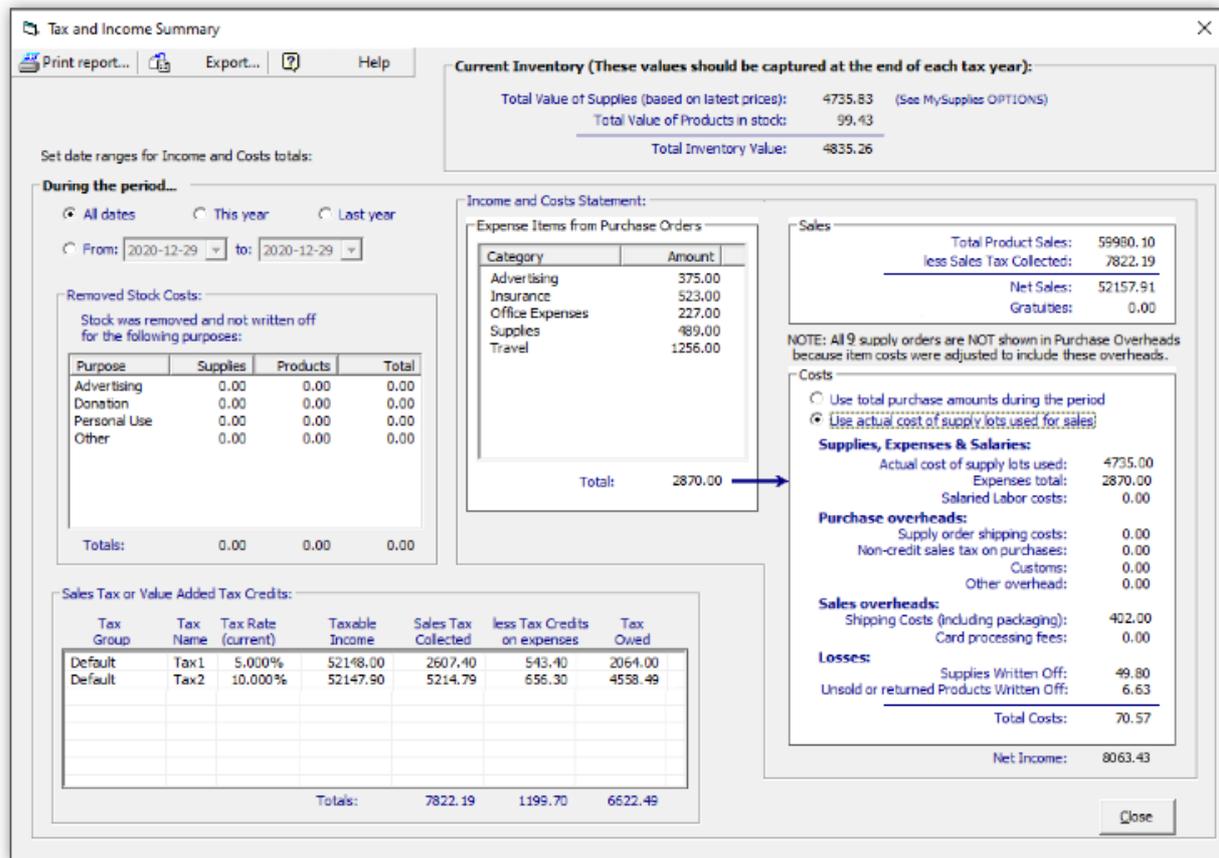
You can leave the Usage History window open and select another item in MySupplies to see its history.

To close the Usage History window, click the **X** in the upper right corner, or select **Close Window** from the main **File** menu.

## Tax & Income Summary

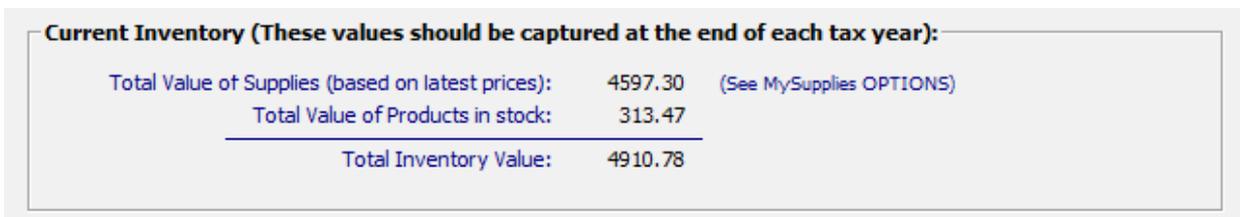
**Pro.** This report can assist in preparing **Income Taxes** as well as **Sales Tax** or **Value Added Tax** returns. It can be printed, or exported to a spreadsheet.

To open this report, select **Tax and Income Summary** under the main **Reports** menu.



The report has 2 main areas:

**1. Current Inventory:**



The **Current Inventory** area shows the current value of all your supplies and products in stock. By viewing or printing the report at the end of each year, you can include the amount in your income tax return. Note: The total value of your Supply Stock can be based on either:

- 'Current market value' based on your **most recent purchase** of each ingredient
- **Actual cost** of each lot purchased.

The method used to calculate stock value depends on the option you choose. See [MySupplies Options](#) for more information.

NOTE: It is important to **capture** the stock values at the beginning of each new year. Write them down and keep them in a safe place. These values represent a snapshot of your current inventory, and will change when you record new purchases or sales. You can set an option in [MyPreferences](#) to display a reminder the first time SoapMaker runs at the beginning of each year.

**2. During the period...**

The lower part of the report shows information for whatever date range you select:

**During the period...**

All dates   
  Year to date   
  Last year

From: 2017-05-05 to: 2017-05-05

**Income Statement:**

Sales \_\_\_\_\_

-

The **Income and Costs Statement** for the selected date range shows:

- Your total product **sales**, the **sales tax** included in your invoices, and your **Net Sales**.
- Total of **gratuities** from venue sales
- Your business **costs**, including direct costs for the raw materials and packaging items you purchased or used during the selected period, as well as labor, other expense items, overhead costs associated with purchases, postage or shipping costs paid to send your products, and card processing fees associated with your sales.
- The **Net Income** calculated by subtracting your total costs from your net sales plus gratuities.

**Income and Costs Statement:**

| Category        | Amount         |
|-----------------|----------------|
| Advertising     | 375.00         |
| Insurance       | 523.00         |
| Office Expenses | 227.00         |
| Supplies        | 489.00         |
| Travel          | 1256.00        |
| <b>Total:</b>   | <b>2870.00</b> |

**Sales**

|                           |                 |
|---------------------------|-----------------|
| Total Product Sales:      | 59980.10        |
| less Sales Tax Collected: | 7822.19         |
| <b>Net Sales:</b>         | <b>52157.91</b> |
| Gratuities:               | 0.00            |

NOTE: All 9 supply orders are NOT shown in Purchase Overheads because item costs were adjusted to include these overheads.

**Costs**

Use total purchase amounts during the period  
 Use actual cost of supply lots used for sales

**Supplies, Expenses & Salaries:**

|                                  |         |
|----------------------------------|---------|
| Actual cost of supply lots used: | 4735.00 |
| Expenses total:                  | 2870.00 |
| Salaried Labor costs:            | 0.00    |

**Purchase overheads:**

|                                    |      |
|------------------------------------|------|
| Supply order shipping costs:       | 0.00 |
| Non-credit sales tax on purchases: | 0.00 |
| Customs:                           | 0.00 |
| Other overhead:                    | 0.00 |

**Sales overheads:**

|                                       |        |
|---------------------------------------|--------|
| Shipping Costs (including packaging): | 402.00 |
| Card processing fees:                 | 0.00   |

**Losses:**

|  |              |
|--|--------------|
| Supplies Written Off:                    | 49.80        |
| Unsold or returned Products Written Off: | 6.63         |
| <b>Total Costs:</b>                      | <b>70.57</b> |

**Net Income:** 8063.43

The **Expense Items from Purchase Orders** list, shows totals for each category of expense you recorded using the **Other Expense** tab in the [New Supply Purchase or Expense Form](#). These are totaled and the total is transferred to the main **Costs** list. (If you need to edit these categories, you can do so from the [List of All Purchases](#) report.)

The **Salaried Labor costs** item is derived from the [Labor Report](#), and shows the total of salaries paid during the selected period.

NOTE: All 9 supply orders are NOT shown in Purchase Overheads because item costs were adjusted to include these overheads.

**Costs**

Use total purchase amounts during the period  
 Use actual cost of supply lots used for sales

To calculate your **Materials and Expense costs**, you can select either of these options:

**a) Use actual cost of supply lots used** - this is your cost of goods sold (COGS) and is calculated from the actual cost of all the products you **sold** during the selected period.

**b) Use total purchase amounts** - this shows a total of all your purchases of materials and packaging, and other expenses for the selected period.

Note that when using option (a), the cost list also shows **Losses**, which are the costs of any supplies or products **written off** during this period. (These are not listed if you choose option (b) since they are

included in your total purchase amounts for the period.)

When you record purchase orders, you have the option to distribute overhead costs proportionally by adjusting each item's cost. If you chose this option, any overheads from affected orders will **not** be included in the **Purchase Overheads** totals, since those costs are bundled into the individual supply item and expense costs. If any recorded orders for the period were saved this way, you will see a note as shown in the example above. For information about this option, see [Overhead Costs](#).

Removed Stock Costs:

Stock was removed and not written off for the following purposes:

| Purpose        | Supplies    | Products    | Total       |
|----------------|-------------|-------------|-------------|
| Advertising    | 0.00        | 0.00        | 0.00        |
| Donation       | 0.00        | 0.00        | 0.00        |
| Personal Use   | 0.00        | 0.00        | 0.00        |
| Other          | 0.00        | 0.00        | 0.00        |
| <b>Totals:</b> | <b>0.00</b> | <b>0.00</b> | <b>0.00</b> |

The **Removed Stock Costs** area lists the costs of all supplies and products stock removed during this period (except stock written off) as reported in your [Stock Removed report](#). It shows the totals for each **purpose**.

You may be able to claim a tax credit for these items.

The **Sales Tax or Value Added Tax** area shows the taxes you have defined in [MyPreferences](#), and referenced in your purchase orders and sales registers.

Sales Tax or Value Added Tax:

| Tax Group      | Tax Name | Tax Rate (current) | Taxable Income | Sales Tax Collected | less Tax Credits on expenses | Tax Owed       |
|----------------|----------|--------------------|----------------|---------------------|------------------------------|----------------|
| Default        | Tax1     | 5.000%             | 15528          | 776.40              | 336.05                       | 440.35         |
| Default        | Tax2     | 10.000%            | 15528          | 1552.79             | 672.10                       | 880.69         |
| <b>Totals:</b> |          |                    |                | <b>2329.19</b>      | <b>1008.15</b>               | <b>1321.04</b> |

Your **tax owed** is the tax you have collected on your sales during the selected period, less any **tax credits** you can claim. Your taxable income for each tax is also calculated as an aid in completing your tax return. (Note that any tax on your purchases that you have **not** defined as credit will be included in your **Purchase Overheads** as shown above under **Costs**, or bundled into the materials and expenses totals if you chose that option.)

If you have defined more than one tax group, all taxes in each group are listed here.

For information on setting up your own taxes, and recording tax on purchases and sales, see the topic [Sales Tax](#).

## Q and A

### Frequently Asked Questions

(Click a category to see list of questions)

[General](#)

[Supplies](#)

[Recipes](#)

[Products](#)

## General FAQs

### Frequently Asked Questions about General topics

(Click one to see the answer)

[I just got SoapMaker. How do I set up my inventory?](#)

[Can I run SoapMaker on more than one \*\*computer\*\*?](#)

[Is there an easy way to delete the \*\*examples\*\* that came with SoapMaker?](#)

[How can I send a picture of the SoapMaker \*\*screen\*\*?](#)

[How can I include my \*\*labor cost\*\* in my recipes and products?](#)

[I got an \*\*error\*\* message - what should I do?](#)

[How do I change the currency symbol for my costs and prices?](#)

[How do I export a report?](#)

[How can I skip the Print Dialog whenever I print something?](#)

[How can I print to a file instead of the printer?](#)

### Other Question areas:

[Supplies](#)

[Recipes](#)

[Products](#)

### Deleting example data

Is there an easy way to delete the examples that came with SoapMaker?

SoapMaker comes with example supplies, recipes, batches, purchase records, and sales records. Once you have familiarized yourself with the program using these examples, you can edit or delete any examples you don't want to keep.

To delete them, choose **Clear Data...** under the **File/Database...** menu, and select the types of data you want to delete.

**Warning: ALL data of the selected types will be deleted, so do not use this command if you have entered any data you want to keep!**

For more information on setting up your database, see [Initial Setup](#).

### Exporting reports

How do I export a report?

Several reports can be exported as CSV files so they can be opened in a spreadsheet. With the desired report open, choose **Export** under the File menu, or click **Export** on the toolbar if available.

CSV stands for 'comma separated values'. A CSV file is a plain text file with columns separated by a particular character. Traditionally this was a **comma**, but this does not work well with all data, particularly in places where comma is used as the decimal point, so you have the option to use **Tab** instead of comma as separator. Whichever option you choose will become the default for the next time.

When you open the saved file with a spreadsheet program, you may have to specify which character should be used as a separator so your file will correctly interpreted. For example, to choose which

separator you want in **Excel**, follow these steps:

1. On the tool ribbon, select the **Data** tab
2. Click **From Text/CSV**
3. In the dialog that opens, select the correct delimiter (e.g. "Tab" or "comma").  
You will see changes immediately in the "data preview"
4. Click the **Load** button to open the file correctly formatted.

## How to handle Error Messages

### I got an error message - what should I do?

There are 2 classes of error messages you may see:

1. **User errors** - indicating for example that you have entered something incorrect or invalid on a form. These are usually self-explanatory, and may include a Help button to get more information.
2. **Program errors** - these are more serious, and should never occur just because of something you typed or clicked. For information on dealing with this type of error, see the topic [Error Messages...](#)

## How to include Labor Costs

### How can I include my labor cost in my recipes and products?

With the **Lite** edition, you can Create a "packaging" item in MySupplies for a labor-hour. Then include the appropriate quantity in each recipe.

**Pro** However, this is not recommended for the **Professional** edition, as it can distort accounting for tax purposes. Instead it is recommended to use the Labor tab on your recipes to record labor costs which will show in your Price List as a guide in setting your prices to achieve the desired profit margin. If you have hired staff, you can also use the [Labor Report](#) to record and track your wage expenses so they will be included as a line item in the Tax and Income Summary report

## Printing directly with no dialog

### How can I skip the Print Dialog whenever I print something?

Normally a **Print Dialog** window will open whenever you print something so you can choose the desired printer, set the format to portrait or landscape, choose double-sided, etc.

If you want to skip this and just print using the system default printer and settings, you can set your preference as follows:

1. Open [MyPreferences](#) by clicking the **Prefs** button on the main toolbar.
2. In the **General** area, Un-check the box labeled **Show Printer Dialog before printing**.
3. Click the **Save** button.

## Print to file

### How can I print to a file instead of the printer?

1. After you click the **Print** button, choose **Printer Setup**
2. Next to Printer Name, choose **Microsoft Print to PDF** or **Microsoft XPS Document Writer**.
3. Click OK

This will save the invoice as a PDF file or an XPS file.

## Saving a screen shot

How can I send a picture of the SoapMaker screen?

To create a **screen shot**, press **Alt-PrtSc** on your keyboard. Then open a graphics program, such as Paint, or a word processor, and **Paste** the image. Save it as a GIF or PNG file, or DOC file.

If you want help with a problem, create a trouble ticket using the CONTACT button on the **Support** page at [www.soapmaker.ca](http://www.soapmaker.ca) and attach the saved file.

## SoapMaker on 2 computers

Can I run SoapMaker on more than one computer?

When you purchase SoapMaker, your licence entitles you to run it on one or two computers for your own use.

If you run SoapMaker on two computers (e.g. a desktop in your office and a laptop in your soap room), you will need to synchronize your database on both machines. If your computers are connected by a local network, they can share a single database file. (You can also do this by using a cloud storage location such as DropBox). See the topic [Sharing your Data](#) for instructions. **Pro**

If your computers are not networked, you can synchronize the databases on each by using the **Backup Data** command whenever you make changes on one machine, then copy the backup file to the other and use the **Restore Data** command to load the copied database.

## Related Topic

[Preserving Your Data](#)

## Venue sale expenses

How do I record booth fees or other expenses for sales venues?

As with any other expenses associated with your business, you can record venue expenses such as booth fees, travel and lodging, meals, etc. using the [New Supply Purchase or Expense form](#).

Open this form by choosing **Record New Purchase...** under the main **Supplies** menu. Select the **Other Expenses** tab, and enter appropriate categories and descriptions of the expenses. If you haven't already done so, create a new 'supplier' for the venue so you can easily find this form later in the [Supply Orders Report](#).

## FAQs about Supplies

### Frequently Asked Questions about Supplies

(Click one to see the answer)

[How do I correct an error in a supply order?](#)

[How can I change a supply item's \*\*unit cost\*\*, or set it to zero?](#)

[How can I adjust the \*\*quantity remaining in stock\*\* of a supply item?](#)

[Why do different supply items have different units \(e.g. \*\*gal\*\* or \*\*lb\*\*\)? How can I change them?](#)

[I recorded several purchases of an item, but the \*\*value\*\* displayed doesn't match what I paid.](#)

[How do I record the price of an ingredient I bought \*\*on sale\*\* while remembering my regular price?](#)

[If I buy supplies in \*\*bulk\*\*, and then resell smaller quantities, how can I track this?](#)

[How can I track \*\*supply Lot Numbers\*\*?](#)

[I purchased a blend of oils - how can I determine the properties?](#)

[How can I track packaging materials by the roll?](#)

[How do I account for \*\*water\*\* used in recipes?](#)

[How do I add \*\*Lanolin\*\* to my base oils?](#)

## Other Question areas:

[General](#)

[Recipes](#)

[Products](#)

## Changing unit costs

[How can I change a supply item's unit cost, or set it to zero?](#)

The unit cost of each supply item is derived from the most recent purchase of that item (unless you marked it 'not for inventory' and there were previous inventory purchases). So when you record a new purchase, the unit cost will be recalculated from the purchase price (adjusted for shipping cost, etc.).

If you made a mistake when recording a purchase, and need to change the unit cost of an item, you can edit the associated supply purchase order accessible from the [Supply Orders Report](#).

If you want the unit cost to be **zero**, then either...

- Record a fake [purchase](#) of any quantity with a price of zero (not blank), or
- Delete all the [purchase records](#) for the supply item - the unit cost will then be set to zero.

**Pro** Note that when you make a batch of products, the cost is always based on the cost of the **actual supply lots** used, not necessarily the latest purchases of each. For more information, see the topic [Cost Calculation](#).

## Correcting a supply order

[How do I correct an error in a supply order?](#)

You can simply **edit** the order - you can access it from the [Supply Orders Report](#).

**Pro** Note that if you have recorded **product batches** using any of the supply lots from this order, and the adjusted cost for the item changes as a result of editing the order, this will not be reflected in the product costs of those batches. Because the order overheads are distributed proportionally to calculate adjusted costs, an item's cost may change even if you just change other items in the order.

## Personal use

[How do I handle supply items for personal use?](#)

When you record the purchase in a [New Supply Purchase form](#), you can check the **Not for Business** box - this will prevent the item from being added to your inventory, or contributing to your business costs.

If you have already recorded the purchase, or just want to use some of the item for personal use, you can use the **Remove Stock** feature as follows:

1. In [MySupplies](#), select the item and click the **Purchase** button (or right-click and choose **Purchase History for Item**).
2. In the [Purchase History report](#), select the purchase record from which you want to take stock for personal use, and then click the **Remove** button (or right-click and choose **Remove or Write-off**).

**stock**).

3. Enter the **quantity** to be removed, choose the **purpose** (e.g. Personal Use), add a **comment** if desired and click **OK**.

## Purchased Oil Blend Properties

### I purchased a blend of oils - how can I determine the properties?

If you purchased a blend of base oils which are already in SoapMaker's database of more than 80 oils, you can easily determine the properties of the blend so that recipe lye quantities will be calculated correctly, and the predicted soap qualities on the graph will be accurate.

There are two ways to do this - if you have the Professional edition, you can use the **Blends** feature to create a temporary custom blend with the same constituent oils and proportions as your purchased blend, then copy the properties of the temporary blend. Or you can **calculate** the purchased blend properties manually using the properties of the constituent oils. Following are step-by-step instructions for each method.

We will use the example of a blend of 60% Olive oil and 40% Canola - let's call the blend 'CanOlive'.

### Using the Blends feature **Pro**

1. On the **Blends** tab of MySupplies, click the **New** button to open a new blend formula. Enter the two base oils 'Olive' and 'Canola', and set the percentages to 60 for Olive and 40 for Canola. Enter any quantity for the total, then save the blend as 'temp'. You will not be keeping this, as you do not actually make this blend yourself.
2. On the **Oils** tab of MySupplies, click the **New** button to create your new purchased blend item - call it 'CanOlive'. The Oil Properties window will open.
3. At the bottom of the Oil Properties window under 'Copy properties from:', select the temporary blend 'temp' that you just created. Click the **Copy Properties** button.
4. Save the properties for CanOlive and close the Oil Properties window.
5. Now you can select the 'temp' oil blend and delete it.

### Manual calculation of blend properties

1. On the **Oils** tab of MySupplies, select 'Olive' and click the **Properties** button. Write down the SAP, Specific Gravity, Iodine, and all the Fatty Acid values, or copy them into a spreadsheet.
2. Select 'Canola' and capture its properties in the same way.
3. For this example where 'CanOlive' is 60% Olive and 40% Canola, calculate the SAP value of the blend like this:

$$\text{CanOlive SAP} = (0.6 \times \text{Olive SAP}) + (0.4 \times \text{Canola SAP})$$

4. Calculate all the other properties in the same way.
5. On the **Oils** tab of MySupplies, click the **New** button to create your new purchased blend item - call it 'CanOlive'.
6. In the **Oil Properties** window for CanOlive, enter all the calculated properties and click **Save**.

Now that you have your new blend's oil properties, you can see how its relative qualities compare with other oils by selecting **Compare Oil Qualities** under the main **Tools** menu.

You can adapt the above procedures for any combination of two or more base oils.

## Reselling supplies

If I buy supplies in bulk, and then resell smaller quantities, how can I track this? **Pro**

Here are ways to track your inventory when you resell supplies:

### Re-packaged bulk ingredients

Let's say you have purchased Lavender EO in bulk, and intend to resell 100 fl oz in **20 fl oz portions...**

1. Create a new non-soap "recipe" called **Resale lavender EO**. Enter 1 ingredient - Lavender EO 100 oz, and 1 packaging item - Bottle 20 fl oz with quantity 1 per portion. Under Options, set the portion size to 20 fl oz.
2. Save the recipe in a group called **Resale Supplies**.
3. Use the **Make Batch** command - this will deduct 100 fl oz from your Lavender EO supplies stock, and create an entry in MyProducts list with 5 portions of 20 fl oz each. Name the Product "Lavender EO".
4. When you sell a portion of your Lavender EO, create a sales record with this item (and whatever else you are selling with it). SoapMaker will deduct the portions sold in your products list.
5. You can print a customer invoice showing the portions sold, plus any overheads like shipping or taxes.
6. In your [Sales Registers report](#), you can see the details of this sale. In your [Sales History report](#), you can select the recipe group **Resale Supplies** and see a list of all your supply sales, when they were made and to whom, and the quantity and your profit margin.

### Accessories

If you resell accessories, such as soap dishes, you can record sales and track inventory as follows:

Remember that Sales registers or Invoices work in conjunction with MyProducts, so anything you want to sell has to first get into a **batch** in MyProducts, which means it has to be used in a **recipe** from which batches can be made.

So let's say you buy **soap dishes** in bulk, and want to resell them...

In MySupplies, create a new packaging item called **soap dish**. When you purchase a quantity of soap dishes, record the purchase - now you have them listed in MySupplies with a unit cost.

#### Selling accessories by themselves:

Now if you just want to sell soap dishes by themselves, then:

1. Create a **non-soap recipe** whose only content is **soap dish** in the Packaging area. Set the quantity to 1 per portion.
2. On the **Options** tab, set the **number of portions** to whatever you like - probably the quantity you buy at one time.
3. Save the recipe in a **group** dedicated to this kind of 'recipe' - call it something like 'Accessories' or 'Resale Supplies'.
4. Make a **batch** with your Soap Dish 'recipe'. Now in MyProducts, you should see a new batch of your Soap Dish recipe. The number of portions made is the number of soap dishes in the recipe, and the **portion cost** is your cost for each soap dish.
5. Now whenever you create a [sales register](#) you can include a quantity of soap dishes and the price you charge for them.

In MyProducts, if you display only batches made with the Soap Dish recipe, you can see the total number of soap dishes remaining in stock. When you buy more soap dishes, record the purchase, then make

another 'batch' with your Soap Dish recipe in order to move them into your products stock.

### Accessories as part of product combinations like Gift Sets:

To create gift sets, or similar groups of products, you need to first transfer any products you have made for this purpose into your Supplies stock (see the topic [Re-using Products as Ingredients](#)).

Then create a 'recipe' for the gift set, including your own products, and any accessories like the soap dishes. For more information, see the topic [Selling Product Combinations](#).

## Special purchases

How do I record the price of an ingredient I bought on sale while remembering my regular price?

On the [New Supply Purchase form](#), check the box labeled **Special Price**.

SoapMaker saves each purchase in the [Purchase History](#) for that ingredient or supply item so you can see how much you bought and what you paid for it. The **unit cost** used in calculating recipe costs is normally based on the most recent purchase, but if the item was flagged as a **special price**, the next most recent item's cost will be used instead.

Despite the above, remember that when you record product batches, the product cost is based on whichever supply lots you actually choose for the batch (not on the recipe costs which are based on the most recently purchased lots not flagged as special price).

## Supply item units

Why do different supply items have different units (e.g. **gal** or **lb**)? How can I change them?

The units for each supply item listed in [MySupplies](#) are based on the most recent purchase of that item. So, for example, when you record a new purchase, if you bought x number of gallons, the units will be set to **gal**. This should make it easy for you to check your stock quantities when doing an [audit](#), or deciding to place an order to replenish supplies.

If you need to change the units for a particular supply item, you can edit the original supply order accessed from the [Supply Orders Report](#).

## Stock value doesn't match prices

I recorded several purchases of an item, but the stock value displayed in MySupplies doesn't match what I paid. **Pro**

In MySupplies, you can choose to have your stock value calculated based either on the **current market value** of your stock (derived from your most recent purchase), or on the **actual price** of each lot purchased. Make sure you have set this option the way you want it on the **Options** tab of [MySupplies](#).

## Tracking packaging by the roll

How can I track packaging materials by the roll?

As an example, let's assume you buy rolls of shrink wrap...

1. Create a packaging item called **Shrink wrap meters** or **Shrink wrap feet**.
2. Record a purchase of your roll of shrink wrap (let's say it comes in a 100 meter roll)... record 1 **container** (the roll) with **quantity** 100 (the length of wrap on a roll).
3. In each recipe, on the **Packaging** tab, enter the Shrink wrap item name, and the estimated number of meters or feet (either per bar, or total for the recipe - your choice). For example, if each bar takes about 20 cm of wrap, enter a quantity of 0.2 Shrink wrap meters per bar.

## Water, accounting for

How do I account for **water** used in recipes?

If you use tap water to make your products, you have options to account for the cost, depending on what method you use for your annual supply costs. You want to account for the costs, but don't need to track inventory.

In order to see the water cost in your recipes and product stock, record a 'purchase' using the [New Supply Purchase](#) form with some quantity and price based on the rate you pay for water. It doesn't matter what quantity you enter, since you're not creating an inventory record.

Before saving the water purchase, check the **Not for Business** box - this will prevent SoapMaker from trying to track your inventory.

On the [Tax and Income Summary report](#), you have two options for tracking annual supply costs:

### a) Use total purchase amounts during the period

If you use this option for your annual cost, then because you checked **Not for Business** on the purchase form, the water price will not be included in your total business costs, but you can still see the cost in recipes and product costs.

To include water costs in your total business costs, before doing your taxes record a 'purchase' using the **Other Expenses** tab on the [New Supply Purchase](#) form and enter the appropriate portion of your water bill that you want to claim as a business expense. Be sure you **don't** click the Not for Business box.

### b) Use actual cost of supply lots used for sales

If you use this option on the Tax and Income summary, then every product sold will add the water cost to your total business costs. You don't need to create a second 'purchase' for the total.

## Related Topics

[Distilled vs. Tap Water](#) - How to set up your supplies and recipes

## Lanolin

How do I add Lanolin to my base oils?

Lanolin is a waxy substance, with only a tiny percentage of the fatty acids we normally use to calculate the numbers for SoapMaker's graph. The SAP value is 0.075 which is only about half of that for a typical soap-making oil.

For these reasons, we suggest Lanolin be treated as an additive rather than a base oil in your recipes. If you prefer to add it to your base oils list, you can use the SAP value above, but it will not contribute to the graph numbers. The specific gravity of lanolin is 0.9.

## FAQs about Recipes

### Frequently Asked Questions about Recipes

(Click one to see the answer)

[How do I create a Melt & Pour soap recipe?](#)

[How do I make a recipe using both NaOH and KOH lye?](#)

[Why do the lye and water amounts differ from another lye calculator I've used?](#)

[Why don't the costs shown in my recipe don't match what I paid for ingredients?](#)

[How can I enter my additives as a percentage of the base oils?](#)

[Can I create a recipe with only packaging items?](#)

[Why is my re-sized recipe too big \(or too small\) for my mold?](#)

[I entered a small quantity of an ingredient, but later it shows zero. Why?](#)

[How do I super-fat my recipe with a specific oil?](#)

[How can I see all my recipe ingredients on the screen at once?](#)

[How do I use Citric Acid in my recipes?](#)

[How do I replace water with another liquid?](#)

## Other Question areas:

[General](#)

[Supplies](#)

[Products](#)

### Melt & Pour soap

How do I create recipes using Melt and Pour soap base?

Since melt & pour soap base has already been saponified, you don't need the lye and water calculation features of the **soap recipe** form.

Create your M&P base ingredients in the **Additives** section of MySupplies, and use the **non-soap** type of recipe for your M&P soap.

If you want to create your own soap base, and then use it in M&P recipes, see the topic [Re-using Products as Ingredients](#).

### Dual lye recipes

How do I make a recipe using both NaOH and KOH lye?

For any recipe using both types of lye, use the **Combined lye** recipe type.

### Recipe calculation differs from other programs

The Lye or Water amount SoapMaker shows is different from other calculators I have used.

The quantity of lye recommended for a particular recipe is calculated from the **Saponification (SAP) values** of each base oil in the recipe as determined by industry research. However, the SAP values for different oils can vary slightly between different manufacturers and even between different batches from the same manufacturer. The SAP values used by SoapMaker are averages of the data from a number of sources. (The values used by other calculators probably are too.)

There is no way of knowing the exact SAP value for your particular oils except to actually measure them, and this is beyond the capability of most home-based soap makers. So don't be concerned about minor discrepancies between different calculators - there is no absolute "bible" of SAP values. We recommend using a **lye discount** of at least 4% to ensure there is some margin for error.

If you have already made recipes from other calculators, and want to match the same lye values, you can adjust the **lye discount** in SoapMaker to give you the same results, and then save this discount in your [Preferences](#).

**IMPORTANT:** If you have defined a **custom oil** and your lye amounts seem wrong, you may have specified the SAP Value incorrectly for that oil. See the topic [Understanding SAP Values](#) for more information.

The water amount is not critical, and can be adjusted to suit your process. For information on how SoapMaker calculates the suggested water amount, see the topic [Water Calculation in Recipes](#).

## Recipe cost doesn't match what I paid for ingredients

The cost of an ingredient shown in recipes does not match the price I paid.

The **unit cost** of each ingredient is always based on the **most recent** purchase of that ingredient (the price you paid adjusted to include overheads such as shipping cost).

This unit cost is used to calculate the ingredient costs in your recipes. Whenever you save a recipe, or update all recipes, the recipe costs are re-calculated using the latest supply costs.

If an ingredient's unit cost does not seem to match your latest purchase, there are several possible reasons. Examine the [Purchase History](#) for that ingredient to check:

- If the purchase you recall really is the most recent one.
- Whether you may have made an error when recording the latest purchase - if so, you can select it in the [Supply Orders Report](#) and edit it to correct the error.
- If you recorded the purchase using **volume** units (e.g. ml or fl oz). If so, it is important to have set that ingredient's [specific gravity](#) (SG) correctly because internally SoapMaker always saves unit cost as cost per gram, even if you choose to record or display it in volume units. If the SG is wrong, the conversion from the volume units to grams will be wrong, and so will the unit cost. To correct this, you must set the SG correctly in [MySupplies](#), then open the purchase order for editing and save it (without changing anything). This will correct the saved unit cost for the affected ingredient.

## Enter Additives as percent of Oils

How can I input my additives as a percentage of the base oils?

After entering all your base oils into a recipe, [resize](#) the recipe so the total base oils weight is 100 oz (or 100 grams). Then if you want an additive to be 2% (for example), add 2 oz (or 2 gr). When you've entered all your additives, resize the recipe again to the size you want.

## Recipe with only Packaging items

How do I create a recipe with only Packaging items? The cost is not showing.

For recipes containing only packaging items, you must use the **non-soap** recipe type.

Be sure to set the **Number of Portions** on the **Portions** tab.

On the **Packaging** tab, you can set the each packaging item's quantity to:

- per any portion
- per a particular sub-batch portion if you have defined more than one sub-batch
- total for the recipe

Since the recipe has no weight, the portion size is just the total number of items you have specified for the sub-batch - you cannot edit this on the Portions tab, only on the Packaging tab.

## Resized recipe too large or small

Why is my resized recipe too large (or too small) for the mold?

Resizing to fit a mold involves conversion from the recipe weight to the equivalent volume. This is always

an approximation, and may require some experimentation.

If you [resize](#) a recipe to fit one or more molds, or to a specified volume, and the resized quantity recipe turns out to be too large or too small, this could be due to any of the following:

1. If your recipe includes ingredients for which you have not specified the correct [specific gravity](#), the volume calculation will be inaccurate.
2. If you use a mixing process which introduces air into the mix, this will increase the volume - you may need to specify your [mold volumes](#) a bit smaller than actual measurements to compensate for this.
3. You may have specified **mold volume** incorrectly (e.g. measured outside instead of inside dimensions, or used the mold height instead of the desired depth.)
4. The **waste factor** may be set too high or too low for your process - SoapMaker increases the resized volume to allow for waste left in the pot. If resized recipes always turn out too large, try reducing the waste factor in the [Resize dialog](#), or in your [Preferences](#).
5. For hot process soap, the **expected water loss** factor may be incorrect. SoapMaker reduces the recipe total weight and volume by this factor. You can adjust this factor on the recipe [Options](#) page, or in your [Preferences](#).

### Small quantity becomes zero

I saved a recipe with **0.25 tsp** of an ingredient, but later it shows **0 tsp**. Why?

First of all, be assured that SoapMaker **does** save your recipe accurately. However, when opening a previously saved recipe, or resizing a recipe, it attempts to round the displayed quantities to a sensible number of decimal places based on your chosen **calculated weight units** and **scale precision**.

So if you have entered a small quantity like 0.25 tsp, but your calculated weight units are in ounces, then the quantity saved will be about 0.04 ounces. If your scale precision is set to 1 decimal place (0.1 oz), then when SoapMaker reopens the recipe, it will treat the 0.25 tsp as insignificant and display 0 tsp as the entered amount, even though it has saved the fractional amount accurately.

To avoid this, all you have to do is increase the scale precision option to show more decimal places (just for this recipe, or for all recipes). Open the recipe again and you should see your fractional tsp amount as you originally entered it.

For more information, see the topics [Scale Precision...](#) and [Recipe Options...](#)

### Super-fat

How do I super-fat my recipe with a specific oil?

SoapMaker uses a 'lye discount' percentage to reduce the lye so that some of the oils don't fully saponify. This is known as 'super-fatting'. Some soapers like to add a 'super-fat' oil **after** mixing in the lye, but since saponification continues for some time as the soap sets in the mold, there is really no way to guarantee that 'special' oil is doing all the super-fatting.

However, if you want to specify a particular oil as a super-fatting agent, you can simply include it in the **Additives** section and it will not be considered in the lye calculation. Be sure to reduce your lye discount to allow for the extra oil. Note that base oils in the Additives section of a soap recipe do not contribute to the **fatty acid** percentages or the **quality** numbers shown on the graph.

### View all recipe ingredients

How can I see all recipe ingredients at once?

On the Recipe form toolbar, click the **Full** button for a full-screen view showing all ingredients, plus the notes area.

To see the Options or Fatty acids, or to use the Wizard, click the **Normal** button to return to the normal view (with tabs for each page).

## Water replacement

How do I replace water with another liquid?

You can put a liquid ingredient such as milk in the **Additives** section of your recipe, and check the box under the **Adjust Water** heading.

This will automatically fill in the quantity with the total water quantity suggested on the **Lye/Water** tab, and set the water quantity to zero.

If you don't want to replace all the water, set the additive quantity to something less, and the water quantity will be adjusted to compensate.

For more information, please see [Milk in Soap Recipes...](#)

## FAQs about Products

### Frequently Asked Questions about Products

(Click one to see the answer)

[What's the best way to organize my products?](#)

[Why can't I see some of my \*\*saved batches\*\* in MyProducts?](#)

[Is there an easy way to make more batches of the same product?](#)

[How do I re-batch leftovers?](#)

[How do I track products sold on \*\*consignment\*\*?](#)

[The \*\*cost per bar\*\* \(or portion\) shown in MyProducts is different from the \*\*Recipe\*\* cost per bar. Why?](#)

[How do I sell packages of products, or \*\*combinations\*\* of different products?](#)

[How can I make a batch size \*\*different\*\* from the recipe size \(like I can with blends\)?](#)

[What does the message 'Number of Bars/Portions exceeds batch size' mean?](#)

[How do I record booth fees or other expenses for sales venues?](#)

[How do I handle returns or exchanges of some of my products?](#)

[How do I track products I give away for advertising?](#)

[How can I email my invoices to customers?](#)

[How do I show free shipping on a customer invoice?](#)

### Other Question areas:

[General](#)

[Supplies](#)

[Recipes](#)

### Adjusting Batch sizes

How can I make a batch size different from the recipe size (like I can with blends)? **Pro**

Unlike with blends, each product batch must have a matching associated recipe in order to support several features, including:

- Supply Usage report
- Repeat Batch command
- Sales History report
- Display batches by recipe

For this reason, a new batch must be based on a saved recipe.

If you want to make a smaller or larger batch, you will need to first re-size the recipe, and save it with a different name (e.g. 'Recipe X - half batch').

## Advertising Samples

How do I track products that I give away for advertising? **Pro**

If you give away individual products, you can simply use the [Remove Stock](#) feature to remove them from MyProducts and record the purpose as **advertising**.

If you prefer to create packages of products for this purpose, first create a **gift set**. Then when you give away a set, record the fact using the [Remove Stock](#) feature. For more information, see the topic [Gift Sets...](#)

In either case, the products will be removed from your stock, and their costs will be recorded as a claimable expense on the [Tax and Income Summary report](#).

## Bar size and quantity

How do I set my bar size and quantity?

SoapMaker provides several places where you can set the **size** and **quantity** of bars (or portions) for recipes:

- When you create a recipe
- When you resize a recipe
- When you use the [Make Batch](#) command to record a new batch (Pro edition only). In MyProducts, you can edit a batch later to change these

Following is a discussion of each of these, suggesting how they should be used and any limitations you should be aware of.

### Recipe bar/portion quantity and size

In [MyPreferences](#), you can set the **Bar/Portion Size** and the **Number of Bars/Portions** you normally make. You can specify up to 4 'sub-batches' with different sizes. This setting will be the default value for all **new** recipes of the same type. (Changing this value in MyPreferences only affects new recipes - any existing recipes will not be affected.)

On a Recipe Form **Portions** page, you can override the default setting, and specify different Bar/Portion Size and Number of Bars/Portions. If the total quantity is different from the recipe total, you'll see an excess shown (either positive or negative). If desired, you can adjust one of the sizes to correct for the excess by clicking the **Adjust** button.

The **cured size** shown is calculated using the **expected shrinkage** which defaults to the value from your Preferences, but can be changed on the recipe form.

### Resizing a Recipe

When you use the **Resize Recipe** command, you have several options for specifying the new recipe size. Unless you use the option to set a different bar size, the resized recipe will have the same **bar size** as the original, and the number of bars will be changed to suit the new total size.

Note: If you have specified bar/portions in more than one sub-batch, resizing the recipe to a specific number of bars/portions will have unexpected results. You should only use this resize option if you have one sub-batch specified.

### Limitations:

When you resize to fit a mold, SoapMaker only considers the total volume of the mold. It does not use the bar size or quantity you may have used when defining the mold - these are only tools to assist you in calculating the total volume.

Resizing to fit a mold may require some experimentation because of the variables involved. After making a batch with the resized recipe, you may have to adjust the mold volume specification a bit to get the desired result with future batches. For more information about this, see the topic [Why is my resized recipe too large \(or too small\) for the mold?](#)

## Recording Batches (Pro edition only)

When you use the [Make Batch](#) command, the **New Batch** dialog provides options for setting the bar/portion size and number of bars/portions. It is possible to divide a batch into as many as 4 sub-batches with different bar sizes. Each size must be given a unique **Tag** to identify it (e.g. 'small', 'medium', 'large')

The bar size options are:

- As per recipe - this is the default option if there are no previous batches made with this recipe.
- Same as previous batch - this is the default if there are already saved batches made with the same recipe, and you used this option for a previous batch.
- Custom - this option enables you to change either or both of the bar size and quantity for this batch.

If the total weight of the bars or portions you define is less than or greater than the recipe total weight, you will see an **Excess** value. If the Excess is positive and greater than one bar's weight, increase the number of bars. If the Excess is negative, you may have to decrease the number of bars, or change the nominal size.

## Editing Saved Batches

Batches that have already been saved can be edited in MyProducts to change the nominal bar sizes or quantities made of each, as well as their Tags.

**IMPORTANT:** The **Tag** is what defines each of your unique products (along with the Product Descriptive Name). Especially if you use the [Price List](#) feature, you will want to make sure that subsequent batches of your standard products have the same Tag.

Normally, your **Tags** will be related to the **Cured Size** (after shrinkage) This is determined by the nominal sizes you set, and by the Shrinkage Factor. So when adjusting either of these, keep in mind that a different Cured Size will effectively create a new product and may need a different Tag.

When you change the Tag in MyProducts, you will be given the option to automatically change all other products in all batches with the same Description and Tag to match, as well as your Price List.

## Bars/Portions exceed batch size

What does the message 'Number of Bars/Portions exceeds batch size' mean? **Pro**

When editing batch details in the [New Batch form](#), or in MyProducts, this message appears if the **Excess** is negative, indicating that the total weight of the batch is insufficient for the bars or portions specified. You need to **decrease** either the portion size or the number of portions made.

## Email invoice to customer

How can I email my invoices to customers? **Pro**

1. Select the invoice by choosing it in the [Sales Registers/Invoices report](#).
2. Click the **Print** button on the toolbar.

3. Click **Printer Setup**
4. Next to Printer Name, choose **Microsoft Print to PDF** and click OK

This will save the invoice as a PDF file that you can attach to an email.

## Free shipping on invoice

### How can I show free shipping on a customer invoice? **Pro**

On the [Sales Register/Invoice form](#), enter the actual **Postage** you pay - this will be recorded as a business cost.

In the **Handling Fee** box, enter minus the postage amount - this will prevent the postage from being added to the invoice total, and the invoice will not show a 'Shipping and Handling' line. If you like, include a memo to indicate shipping is free.

## Lost batches

### Why can't I see some of my saved batches in MyProducts? **Pro**

There are several possible reasons why a particular batch does not show in MyProducts batch list:

1. You may have selected a date range that does not include the date when the batch was made
2. If the **Show only batches with remaining stock** box is checked, any batches with no stock left will not be shown.
3. If a particular Recipe, Recipe Group, or Product Description is selected, only batches matching those criteria will be shown.

Note: If you choose the option to **Show Batches by Recipe**, then if you have **deleted** a recipe with saved batches, or **renamed** the recipe without accepting the option to have the batch recipe name changed to match, in order to see affected batches in the list choose **All Recipes in All Groups**, or check the box labeled **Show only batches with no associated recipe**. Alternatively, you can choose **Show Batches by Product Description** instead.

## Product costs differ from recipe

### The cost per bar (or portion) shown in MyProducts is different from the Recipe cost per bar. Why? **Pro**

This could be due to several factors:

- Recipe costs and Batch costs serve different purposes, and are calculated in a different way. For more information, see the topic [Cost Calculation](#).
- If you have specified the bar **size** in the recipe, then the number of bars may include a fraction (e.g. 24.6 bars). When you make a batch, MyProducts drops the fractional bar so the number of bars in MyProducts is always an integer (e.g. 24). (The fractional part is shown as excess weight.) In this example the cost per bar will be slightly different because of the difference in number of bars (e.g. 24.6 vs. 24)
- The batch information is historical. If you have changed the recipe since making the batch, or purchased new ingredients with a different cost, the updated recipe costs will not match the batch costs.
- If you have changed either the bar size in the recipe, or the nominal bar size in the batch, the cost per bar will no longer match.

## Re-batching leftovers

### How do I re-batch leftovers from previous soap batches?

Whenever you make a batch of solid soap, there may be leftover ends too small to be sold. Or if you make liquid products, there may be some left after pouring into bottles or jars. If you want to add these leftover bits into new product batches, here is a way to account for them...

In [MyProducts](#), select the batch from the list. In the **Batch Details** area, you can see the bars/portions and sizes you have specified, as well as any **excess** left over.

You can **Reuse** this excess as an additive ingredient to use in other recipes - for more information, see the topic [Re-using Products as Ingredients](#).

## Repeating a batch

### Is there an easy way to make more batches of the same product?

In [MyProducts](#), select the batch you want to replicate and then click the **Repeat** button on the main toolbar. This will use the saved recipe from the previous batch and open the [New Batch dialog](#) with the same settings as the previous batch.

## Returns or exchanges

### How do I handle returns or exchanges of some of my products? **Pro**

#### Returns

If a customer returns products for any reason, you can record this fact as described in the topic [Product Returns...](#)

#### Exchanges

If a customer just exchanges some products, you can just edit the relevant invoice to reflect these changes and make sure your product stock is adjusted accordingly.

Here is a step-by-step process:

1. Open the [Sales Registers/Invoices report](#) (under the main **Products** menu). Choose a time period that will include any invoices affected.
2. Select the invoice from the **Sales Registers** list. If more than one invoice is involved, you can click the **Customer** heading to sort the list so they'll all be together.
3. Double-click the invoice to open it for editing.
4. Make any changes necessary. You may want to add a note in the **Memo** area about the return or exchange.
5. **Save** the edited invoice, and then print it if desired.

Your product stock will be adjusted automatically to reflect the changes.

## Selling product combinations

### How do I sell packages of products, or combinations of different products? **Pro**

If you are simply combining ingredients that you have not already processed or packaged, use the [Blends and Infusions](#) feature. Note that a blend may contain other blended ingredients.

To sell **groups** of products, or **packaged combinations**, additional steps are needed. Examples of this type of product might be:

- gift sets
- packets of bath salts or balls
- soap bars which contain imbeds (chunks of other soap)

For instructions, please see the following topics:

[Re-using Products as Ingredients](#): Transferring finished products into your Supplies list

[Imbeds](#): Including pieces of already made soap into new soap recipes

[Soap bases and re-batching](#): Using pre-made soap as base for new recipe

[Gift sets](#): Creating packages of your products and other purchased items

## Reference

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This section contains the following topics:

[Definitions](#) - Terms used in SoapMaker

[Distilled vs. Tap water](#) - How to manage both

[Error Messages](#) - What to do if you see one

[INCI Names](#) - the International Nomenclature of Cosmetic Ingredients

[Labor Costs](#) - How to include them in your product costs

[Preserving Your Data](#) - How to protect your SoapMaker records

[Printing](#) - How to set up your printer, and use SoapMaker's Print Preview feature

[Registration and Version](#) - How to determine your SoapMaker registration information and version number

[Sales Tax](#) - How to set up and track tax on your purchases and sales

[Scale Precision](#) - How SoapMaker stores and displays recipe quantities

[Sharing your Database](#) - using SoapMaker with multiple users or multiple computers

[Specific Gravity](#) - What it means, why it's important, and how to measure it

[Suggested Reading](#) - A list of good books about soap-making

[Understanding SAP Values](#) - Oil saponification

## Citric Acid

### Using Citric Acid to improve your soap

Adding Citric Acid to your lye water is a cost-effective way to make soap which will reduce soap scum and rancidity, especially if you use tap water which is 'hard' (e.g. contains calcium or magnesium).

Citric Acid reacts with lye to produce sodium citrate, or potassium citrate. These are **chelators** which bind to the metallic ions in hard water so they can't bind to the soap molecules.

Adding Citric Acid to your lye water will consume some of the lye. If you don't want the extra super-fatting, you may want to increase the lye quantity a bit to compensate...

**NaOH SAP value** is 0.571 for monohydrate Citric Acid or 0.625 for anhydrous Citric Acid. You can use **0.6** as a good approximation for NaOH SAP (or 0.8 for KOH SAP).

So additional NaOH = 0.6 X Citric Acid quantity, or additional KOH = 0.8 X Citric Acid.

The easiest way to do this is to define Citric Acid as a **base oil** - SoapMaker will then calculate the lye quantity correctly to compensate for the Citric Acid recipe quantity.

**Important:** If you use the [Liquid Soap Calculator](#) and specify Citric Acid as neutralizer, please note that it is incompatible with this method because the calculator assumes the neutralizer is an additive. If you want to use both methods, you can either:

- Use a different neutralizer for liquid soap recipes (e.g. Borax or Boric Acid), or
- Keep your 'Citric Acid' additive and define a base oil 'citric acid' with a different name. When you purchase some, you will have to manually split the purchased quantity into the two supply items.

### If you already have Citric Acid defined as an Additive and want to move it to Base Oils:

You cannot use the same name for an Additive and a Base Oil. So first, rename your additive to something like 'Citric Acid OLD'. Then define a new Base Oil as explained below.

**Pro** If you already have stock, create a new 'dummy' purchase order to record the stock quantity for the new base oil Citric Acid (Choose **Record New Purchase** under the main **Supplies** menu). Then edit the stock remaining for the old Citric Acid additive and set it to zero (Select it in MySupplies, click the **Purchases** button on the toolbar, select the purchase lot with stock remaining and click the **Edit** button on the toolbar).

### Defining Citric Acid as a Base Oil

In MySupplies, choose the Base Oils tab and click the **New** button on the toolbar. Enter the name 'Citric Acid' and click OK. The Properties window will open.

Enter these values:

SAP: **0.6**

Specific Gravity: **1.54**

INCI name: **Citric Acid**

Leave the other fields blank and click the **Save** button.

Now you can use this Citric Acid 'base oil' in your recipes to get the correct lye calculation.

## Cost Calculation

### How SoapMaker Calculates Costs of Supplies, Recipes and Products

**Supply Costs** are calculated from your recorded supply purchases which you enter using the [New Supply Purchase](#) form. The cost of each item in a supply order is based on the price and the quantity purchased. Any supplier discount is allocated proportionally to each item in the order to arrive at the **adjusted cost** of each.

You can also choose the option to have **overhead** costs such as shipping cost distributed proportionally to each item's adjusted cost. (For a discussion of the pros and cons of using this option, see the topic [Overhead Costs](#).) These adjusted costs are then saved in separate records for each supply lot purchased, and form the basis for all other cost calculations.

**Pro** Your total costs for a given period are shown on the [Tax and Income Summary](#) report.

**Recipe Costs** are based on the current market value of each ingredient, based on your **most recent purchases**. This gives you an idea of what your products will cost when made with the latest supplies, and provides a consistent basis for comparing different recipes in the List view of [MyRecipes](#). An exception to this, is if you record a purchased item with **special price** checked - this tells SoapMaker not to use this price in recipe costs; instead it will use the cost from the next most recent purchase.

In [MySupplies](#), the **Cost per Unit** of each item is based on the most recent purchase of that ingredient (unless **special price** was checked).

**Pro** The **Value** of each stock item, and the **Total Values** may be based either on current market value (latest purchases), or on the actual adjusted costs of the remaining stock in each lot. You can choose which method you prefer on the **Options** page of MySupplies. The total value of all your supply stock appears on the [Tax and Income Summary](#) report.

**Pro** Your **Product costs** are calculated from the actual adjusted cost of each ingredient lot used to make the batch. Since some of those lots may not be the most recently purchased, the costs of those ingredients could be different from the latest ones. Product costs help you set your prices and determine your profit margin.

**Pro** Your **Product prices** are set by you when you create a sales record or customer invoice. You can pre-set prices using the [Price List](#) form, then have them filled in automatically when creating an invoice. Your total sales for a given period are shown on the [Tax and Income Summary](#) report.

## Currency symbol

### Currency Symbol used for costs and prices

SoapMaker does not use currency symbols and simply saves cost and price information as decimal numbers.

## Definitions

### Additive Ingredients

In SoapMaker, the term **additive** refers to any ingredient which is not saponified (i.e. anything except base oils).

Examples of additives are scents (essential oils and fragrance oils), as well as things like clay, color, salt, etc.

### Base Oils

In SoapMaker, the term **base oils** refers to the saponifiable fats and oils which are mixed with lye and water to make soap. The SoapMaker database includes over 80 base oils which you can select when creating a recipe.

Each base oil in the database has unique properties which are used to calculate the amount of lye needed for saponification, and the effects on the predicted soap qualities as displayed on the graph.

### Benchmark

A "benchmark" is a standard or point of reference for comparison. The Recipe Qualities graph shows a set of **benchmark** qualities to help you gauge whether a new recipe is going to be suitable. The benchmark qualities initially provided with SoapMaker represent a fairly good basic recipe for comparisons

You can replace the provided benchmark numbers with those from your own favorite recipe – just open the recipe and then choose **Set as Benchmark** under the **Recipe** menu.

### CSV files

"Comma Separated Value" or "Character Separated Value" files are plain text files with tabular data separated by a particular character. SoapMaker can export some reports in CSV format, using the **Tab character** as separator. The resulting text files can then be opened in a spreadsheet program for processing.

### Cured Size

For products which shrink as they age (e.g. solid soap bars), this value gives the 'final' size after the product has cured sufficiently. It is calculated from the nominal size set when the batch is first made, and the **Shrinkage Factor** you set.

### Custom Oils

If you use a [base oil](#) which is not included with the standard oils provided with SoapMaker, you can add your

own **custom** oil to your supplies list by using the **New** button in MySupplies. You provide a unique name for your custom oil, and define all its [properties](#).

## Database

SoapMaker's database is a special file which contains all the information used and managed by SoapMaker, including your recipes, the properties of oils, your inventory of ingredients and products, and your costs and purchase and sales history.

## Default

A **default** value is one that is supplied automatically for your convenience, if you don't specify otherwise.

You can pre-set many default values in [MyPreferences](#), and you can override a default when it's used by simply typing or selecting a different value. In [Recipe forms](#), you can also change optional values and then save them as the defaults for all recipes of the same type.

## Dialog

When a **dialog** window is open, you must complete whatever task is required and close the window before you can carry on with other functions. If you click outside a dialog window, a beep will warn you to close the window first before trying to do anything else.

## Discount

In soap recipes, it is wise to reduce or "discount" the amount of lye slightly to ensure there will be no unsaponified lye remaining in the finished soap. You can also discount the calculated water amount to make a stiffer batch which traces faster and takes less time to dry.

In SoapMaker, you specify a discount by entering a percentage. For example a lye discount of at least 4% is recommended for solid soap. To make a more luxurious soap which is kind to the skin, you can "superfat" your recipe by increasing the lye discount a bit more.

You can also **increase** the lye or water amount by specifying a **negative** discount percentage. For example, when making liquid soap, you may want to leave excess lye in the paste stage by specifying a "discount" of -10% or so. (Make sure your process includes a neutralizing stage to eliminate excess lye.)

## SAP Value

For each base oil in SoapMaker's database, there is an associated **saponification** (SAP) value, which specifies how much Sodium Hydroxide (NaOH) is needed to fully saponify a unit amount of that oil. For example, olive oil has a SAP value of 0.135, which means that it takes 135 grams of NaOH lye to saponify a kilogram of olive oil.

For recipes using Potassium Hydroxide (KOH), SoapMaker automatically calculates the equivalent SAP values using the formula:  $KOH\ SAP = NaOH\ SAP \times 1.4025$ .

For more information, see the topic: [Understanding SAP Values](#)

## Superfatting

Superfatting means ensuring there is some **unsaponified oil** remaining in finished soap to make it gentle on skin.

You can superfat soap recipes either by [discounting](#) the lye by a few percent, or by including additional oil or neutralizing agent in the [Additives](#) list.

## Tag

A descriptive word applied to each different sized sub-batch in a product batch e.g. 'small', 'medium' or 'large'. The combination of **Product Description** and **Tag** uniquely define each of your products in your [Price List](#).

## Waste factor

The Waste Allowance Factor is intended to allow for product loss during processing, such as residue that remains in the pot after pouring into molds.

For example, if the Waste Allowance is 2%, when you make a batch, the batch weight will be **2% less** than the recipe weight. When you resize a recipe to fit a mold, the resized recipe will be **2% larger** than the mold volume to allow for the waste.

The default Waste Allowance factor is set in MyPreferences for each recipe type, but you can override the

default setting by entering a different percentage when editing a recipe, making a batch, or resizing a recipe.

## Water Calculation in Recipes

### How SoapMaker calculates the Water amount in soap recipes

The **lye** amount is calculated from the amounts of base oils and their [SAP values](#). The **water needed** amount is then calculated from the lye amount. Note that this water amount is only a suggestion, and can be varied by entering a desired **discount**, specifying a desired **lye solution strength**, or specifying a **water/lye ratio**. Experienced users will generally find the water ratio that best suits their process, and set this as the default for new recipes in their [preferences](#).

The suggested lye/water amount depends on the recipe type as follows:

#### Solid Soap Recipes

SoapMaker calculates the water needed as **2.33** times the undiscounted lye amount. This gives a **lye solution strength** of 30% when you have a zero lye discount.

When you discount the lye, the water amount does not change - you can discount that independently. And you have the choice of specifying the desired water by a discount (which can be positive or negative), or by entering the desired lye solution strength. For example, if you want to maintain the 30% solution strength after discounting your lye, you can enter that solution percentage in the water area.

#### Liquid Soap

When using KOH lye for a liquid soap recipe, the water needed is calculated as **3.3** times the undiscounted lye amount, assuming KOH purity of 100%. This would give a lye solution strength of 23.3%.

When you discount the lye, or enter a KOH purity of less than 100%, the water amount does not change - you can discount that independently, or enter the desired lye solution strength.

#### Cream Soap

Both NaOH and KOH are used in a cream soap recipe. The water needed is calculated as **6** times the total undiscounted amounts of NaOH plus KOH.

When you discount the lye, or enter a KOH purity of less than 100%, the water amount does not change - you can discount that independently.

Once you get the discounts you like and are happy with your process, you can set your [Preferences](#) so that all future recipes of that type will default to your preferred values.

## Distilled vs. Tap Water

### Distilled Water or Tap Water?

Depending on whether you use distilled water, tap water or both in your recipes, you will need to set up the **Water** item in MySupplies accordingly. If you use both, you will also need to create an **additive** ingredient for the other as described in the options below:

- a) If you usually purchase **distilled water** for use in soapmaking, then use the **Water** item in MySupplies to track your distilled water stock. (If you also use tap water in some recipes, create an **additive** called "tap water".)
- b) If you usually use **tap water** in your soap, let the **Water** item in MySupplies represent this, and uncheck the **Track Usage** box since you do not have a water "inventory". For guidance on accounting for water costs, see the topic [Water, accounting for...](#)  
If you also use distilled water in some recipes, you can create an additive call "distilled water".
- c) If you use both **distilled water** and **tap water** in soapmaking, make sure you enter recipes to match the way you have set the **Water** item in the [Lye/Water list](#) of MySupplies according to this table:

| If this recipe uses: | And MySupplies "Water" item is: | Then do This:  |
|----------------------|---------------------------------|--|
| Tap water            | Tap water                       | No action needed   |
| Tap water            | Distilled water                 | Enter a <b>Tap Water</b> additive and check the <b>Adjust Water</b> box.       |
| Distilled water      | Tap water                       | Enter a <b>Distilled Water</b> additive and check the <b>Adjust Water</b> box. |
| Distilled water      | Distilled water                 | No action needed   |

NOTE: The [Expected Water Loss](#) parameter in recipes only applies to the main 'water' ingredient in MySupplies, not to an additive you have created.

### Related topics:

[MySupplies - Lye and Water](#)

[The Recipe Form -Lye and Water Ingredients](#)

[Water, accounting for](#)

## Error Messages

### Program Error Messages

Program errors can occur for various reasons:

- a) A spurious electronics error
- b) An underlying problem with the operating system
- c) A 'bug' in the SoapMaker program code

Errors of this nature should never happen just because of something you entered or clicked while using the program.

If SoapMaker encounters an program error, it will display a message with a description of the error, and will save an error log file called **SM3 ErrorLog.txt** in your Documents folder.

If the error appears to be caused by a corrupted database, you will have the option to have your database repaired automatically - however, if the problem recurs after an attempted repair, it may be necessary to restore a previously saved backup copy of your database

In the rare case of a fatal error, SoapMaker will close automatically after reporting the error. In any case, it is wise to close the program without saving any changes you may be currently making, and restart it.

## Reporting Problems

If you encounter a program error, please report it by submitting a problem report. Use the CONTACT button on the **Support** page at [www.soapmaker.ca](http://www.soapmaker.ca). Be sure to describe what was happening when the problem occurred, and include the contents of the saved error log file.

## INCI Names

The **International Nomenclature of Cosmetic Ingredients (INCI)** is a list of universally recognized ingredient names. In some countries, cosmetic products must list the INCI names of all ingredients on their labels.

SoapMaker includes the INCI name of all the standard **Base Oils**, and enables you to record the INCI name of any **Additives** you create in MySupplies.

When you **print a recipe**, you have the option to include the list of INCI names of all the ingredients in the recipe, sorted by weight. You can also **export a text file** containing the list of INCI names of all the ingredients in a recipe - this can be edited to include in product labels.

If a recipe includes a custom **blended ingredient**, the printed or exported list of INCI names includes the blend's **component** ingredients, rather than the blend itself.

For a list of many common ingredient INCI names, see: [Common SG and INCI Values](#)

## Preserving your Data

### Database Backup

Unlike many application programs, SoapMaker does not require you to manage individual files or documents. Your recipes and inventory information are all saved within SoapMaker's [database](#).

To safeguard against computer failure, or corruption of the database due to a computer error or power failure, it is important to **back up** your database frequently. This means making a copy of the database file in a different location and saving it on an external medium such as a flash drive, external hard drive, or writeable CD. You can also use a cloud storage service, but first see this [warning](#).

To make a backup copy of the database at any time (e.g. after having made changes you do not want to lose), choose **Backup Data...** from the **File** menu. You will be asked to specify the location for saving the file.

Whenever you close the SoapMaker program, it will remind you to backup your data and offer to do it immediately, unless you have already used the Backup Data command today. (You can turn off future reminders, but this is not recommended.)

### Problems writing to an external medium, such as CD, DVD or flash drive

If SoapMaker is unable to save your database copy directly to an external medium, try saving it to your desktop, then drag the file onto the writeable media, or use a CD/DVD writing utility such as Nero.

### Recovering Your Data

If you have to repair or replace your computer and re-install SoapMaker, or if your database ever becomes corrupted, you can restore your data from a backup copy.

Choose **Restore Data...** from the **File** menu. You'll be asked to specify the location and name of the backup file.

### Synchronizing Two Computers

If you run SoapMaker on two computers which are connected by a local network (e.g. a desktop in your office and a laptop in your soap room), you can set up a shared database so that either computer will have access to the latest data, and can change it. For more information, see the topic [Sharing your Database...](#)

If two computers are **not** connected by a local network, you will need to synchronize your database on both machines. You can do this by using the **Backup Data** command whenever you make changes on one machine, then copy the backup file to the other and use the **Restore Data** command to load the copied

database.

## Compacting and Repairing your Database

As you add and remove information, over time your database may accumulate blank spaces which will make the file unnecessarily large, and slow down performance. **Compacting** your database removes any wasted space, and also attempts to repair any problems found. It is not necessary to do this every time, but a good idea to do it occasionally, or if you suspect a problem.

When you close SoapMaker, if you have not compacted your database in the past 20 sessions, you will be given the option to make a backup copy, and then have your active database compacted.

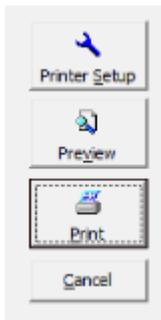
At any time, if SoapMaker encounters an [error](#) which could be due to database corruption, it will attempt to compact and repair the database before restarting.

You can also request that your database be compacted at any time using the **Compact & Repair Database** command under the File menu.

## Printing

### Printing SoapMaker Documents

Many windows within SoapMaker provide a **Print** command, which can be accessed from that window's **toolbar**, right-click **pop-up menu**, or the **Print** command under the main **File** menu.



In most cases, you will see a dialog window with various options, including the buttons shown here.

The **Printer Setup** button enables you to select a printer other than your default, or change the **paper size** or **orientation** (e.g. landscape instead of portrait). If you want to save the printout as a PDF file instead of printing on paper, change your printer to **Microsoft Print to PDF**. You can also access Printer Setup from the main **File** menu.

Click the **Preview** button if you want to check it before printing... The **Print Preview** window shows the document as it will appear when printed. If you don't need to preview first, click the **Print** button.

Normally when you click **Print**, a dialog will open so you can select the desired printer, choose portrait or landscape form, or set other printer options such as double-sided. If you prefer to print directly, you can set this as your preferred option; see the topic [Printing directly with no dialog...](#)

### Print Preview window

The **Zoom** control gives the option of seeing the page full size (100%), or reduced (60%) in case your screen is not large enough to display it all at once. If the page is too large to fit within the preview window, **scroll bars** will appear along the edges.



For multi-page documents, **page scroll arrows** appear at the top, and the number of the currently displayed page is shown.

If you are satisfied with the content, click the **Print** button - the preview window closes, and your document is sent to the printer. Note, there may be some delay before printing begins.

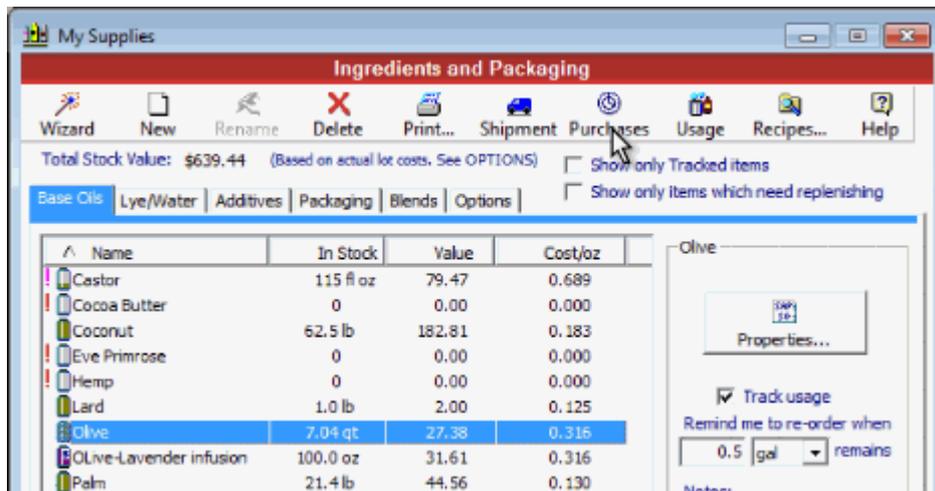
## Recalls

### How to handle a supply recall

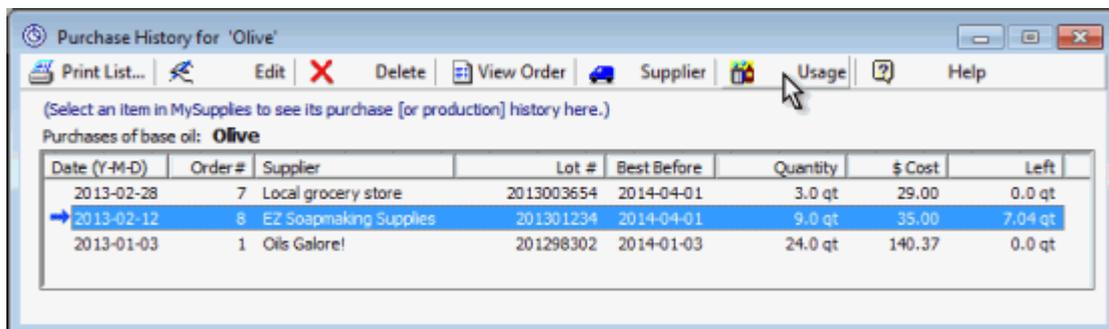
If one of your suppliers notifies you that you may have purchased an ingredient that was sub-standard and is being recalled, it will be important to be able to determine whether you have made products with the recalled lot or lots, and if so, to whom you have sold those products. SoapMaker provides the tools to do this. To illustrate the process, let's consider the following example:

Assume you have been notified by the fictional supplier **EZ Soapmaking Supplies** that several lots of Olive Oil need to be recalled. They have provided a list of manufacturer lot numbers, and the range of dates when these were sold.

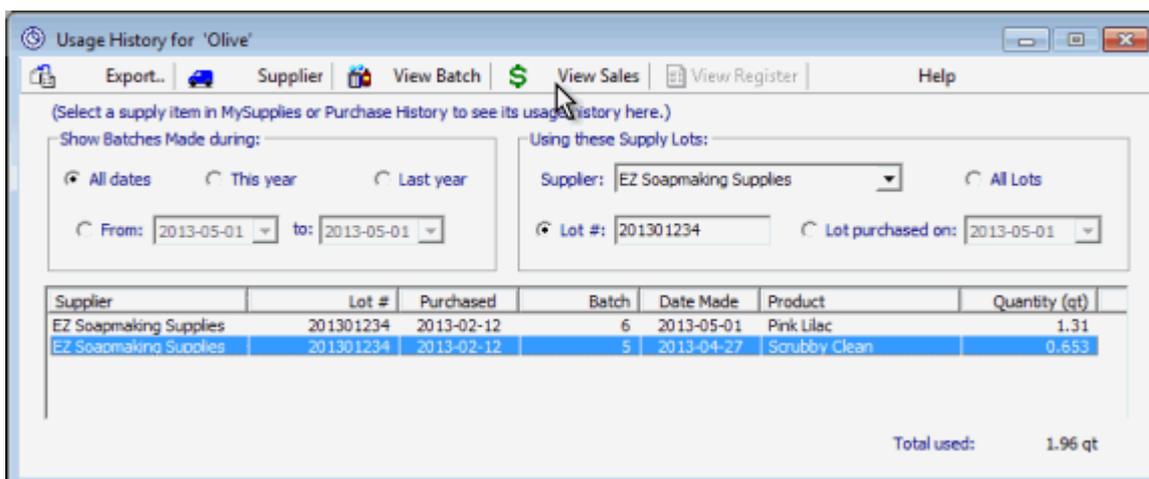
The first step is to open MySupplies and select the **Olive Oil** item.



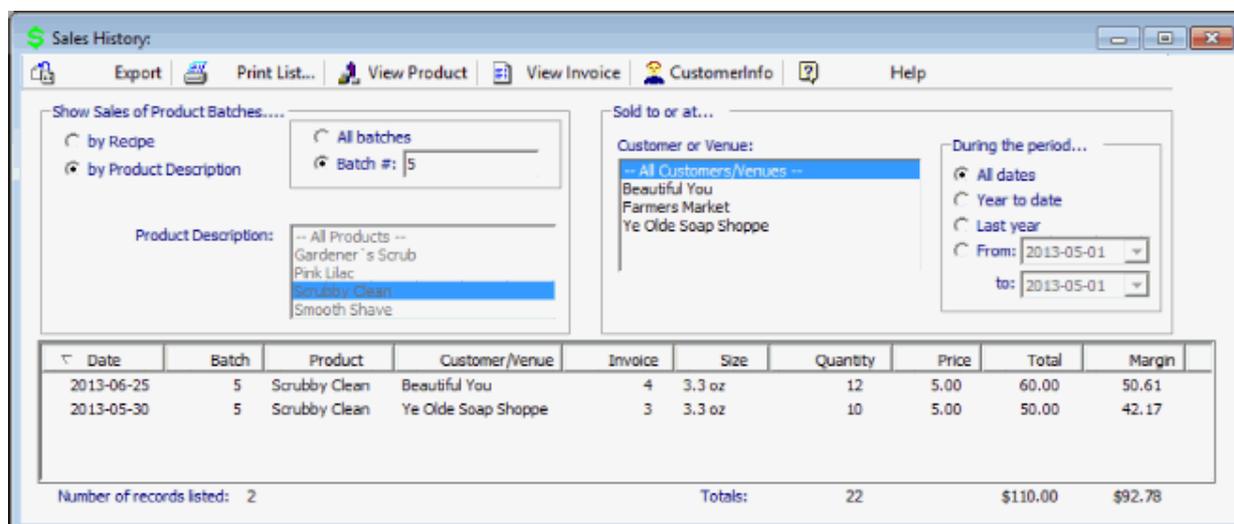
Click the **Purchases** button on the toolbar - this will open the **Purchase History** for Olive Oil...



Look through the list of Olive Oil purchases to see if you there were any with the problem lot numbers. For our example, let's say that lot # 201301234 purchased on Feb. 12 is one of the problem lots. You can see from the Purchase History that some of this lot has been used, since the quantity left is less than the quantity purchased. Select the suspect lot and click the **Usage** button on the toolbar. This will open the **Usage History** for Olive Oil, with the supplier and lot number already selected...



The [Supply Usage report](#) shows all batches made with the selected lot of Olive Oil. In our example, there were two batches made, one batch of Pink Lilac and one batch of Scrubby Clean. Now if you select one of these batches and click the **View Sales** button on the toolbar, it will open the **Sales History** report with that batch selected...



The [Sales History report](#) lists all sales of products from Batch #5, which was made using the recalled Olive Oil lot. From here you can see the name of the customer, the date the products were sold, and the invoice number. By selecting one of the list entries, you can then view the **invoice** or retrieve the customer's **contact** information.

## Related Topics

[Supply Lots](#) - Recording and tracking supply lot numbers

[Purchase History report](#)

[Supply Usage History report](#)

[Sales History report](#)

[Supply Lots Used in Batch](#)

[Blend sources](#)

## Blend sources

### Tracing Source Ingredients for a Blend

Determining which ingredient lots you used to make a [blend](#), and which products may now contain those ingredient lots is a bit more involved than for regular ingredients...

#### How to trace forward:

For one of the ingredients used to make your blend, select it in MySupplies, and click the **Usage** button.

This will show all product batches and blend lots made with this ingredient, and the ingredient lot number used for each. (In the case of a blend, the 'Batch number' is your own blend Lot number, rather than a product batch.)

In the displayed **Usage History** for the ingredient, select a record where the ingredient was used to make the **blend lot** in question, and note the **ingredient Lot** number.

Now click the **View Batch** button - this will show all product batches made with that blend lot (and therefore with the selected ingredient lot).

#### How to trace backwards:

Select a batch in MyProducts that was made from a recipe that includes the blend.

Click **Reports/Supply Lots Used** - this will open the **Supply Lots Used** report, showing all the ingredient lots used to make the batch, including any blends.

Now you know the **blend lot number**, use the **Trace Forward** steps above to identify ingredient lots used.

## Registration and Version

### What Version and Edition?

To determine your current version of SoapMaker, select **About SoapMaker...** under the main **Help** menu.

This will display an information window showing:

- Program version
- Which edition you have (Lite or Professional)
- Database version
- Your Registration information

To find out if there is a more recent version available, click the **Check for Updates...** button.

For instructions to upgrade from Lite to the Professional edition, click the **Upgrade to Pro...** button.

## Sales Tax

### Sales Tax and Value-Added Tax

SoapMaker provides a number of features to help you track taxes and **Pro** prepare tax returns.

#### Initial Setup

Set up your taxes in [MyPreferences](#) on the **Production and Taxes** tab. You can define as many **tax groups** as needed for different tax regions. Each tax group can have up to three taxes specified (e.g. city, state, federal). Initially they are called **Tax1**, **Tax2** and **Tax3** - you can give them names meaningful to you (max. 4 characters). Enter the percentage rate for each tax. If you do not use a tax, just leave the **Use**

box unchecked.

When you purchase supplies, if you are able to claim a credit for tax you pay, select the **Credit** option. Otherwise select the **Cost** option, and any tax you pay will be treated as part of the total cost.

If you sell products in regions with different taxes, you can define additional **tax groups** for those regions. To create a new tax group, select **New Group...** from the drop-down list. Then enter a name for the group and check the **Use** box for each tax that is required. Enter names and rates for the taxes in that group. Click **Credit** or **Cost** as appropriate for each tax.

You can **rename** an existing tax group, or **delete** the group if no longer needed. (You cannot rename or delete the Default group.)

When you add, rename or delete a tax group, the change takes effect immediately even if you click the **Cancel** button. However, the tax names and rates within a new tax group will not be saved unless you click the **Save Changes** button.

## Recording Purchases

When recording the purchase of supplies on the [New Supply Purchase Form](#), the tax Credit/Cost options are initially set according to the **Default** tax group defined in your preference settings, If desired you can select a different tax group from the drop-down list. You can also select **Edit Taxes...** to open [MyPreferences](#) so you can change the details for any tax group, including the tax rate and cost/credit option.

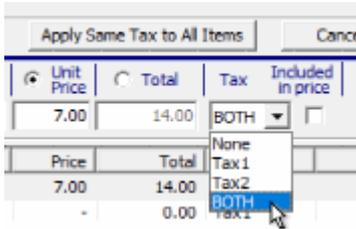
SoapMaker does not calculate the tax on your supply purchases because not all items may be taxable, or tax may not apply on your order. Instead, enter the actual tax amount from your supply order invoice.

Notice that, in the example above, the HST tax amount entered is not included in the **Total Business Cost** because it is recorded as a credit which will appear on the [Tax and Income Summary Report](#).

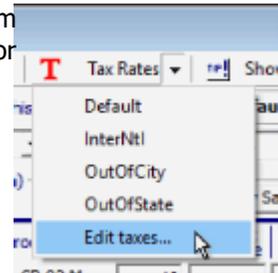
## Pro Recording Sales

When recording your product sales on the [Sales Register/Invoice Form](#), you select which taxes are collected for each product included in the register using the drop-down list next to the total price. SoapMaker calculates the tax for each item, and shows the tax totals at the bottom of the form.

If this invoice is for sales in a different tax region, select the desired tax group from the drop-down menu. Or select Edit taxes if you need to define a new tax group, or change the tax rate or cost/credit option for an existing tax.



If you collect sales tax or value-added tax, select the appropriate tax from the drop-down list for the item currently being edited.



For venue sales, you may prefer to include any tax in your prices instead of having to calculate tax and add it on for each sale. In this case, check the **Included in price** box.

If every item will have the same tax, click the **Apply Same Tax to All Items** button. Or click the **Use 1st item's Tax Rate for All Items** button at the bottom of the form.

### Edit Tax Totals

SoapMaker calculates the tax totals by applying the selected tax rate to each item and summing the results. But if you are importing sales records, or entering sales from a venue, then each item represents an isolated transaction, and the tax amount for each item was probably rounded to the nearest cent. For this reason, the tax totals calculated by SoapMaker may be slightly different from those actually collected.



If this is the case, you can edit the tax total amounts by clicking the **Edit Tax Totals** button - this will allow you to edit the total amounts. The button label will change to **Revert to Calculated Totals**; click it to restore the calculated values.

### Related Topics

[Recording Purchases](#)

[Recording Product Sales](#)

[Tax and Income Summary Report](#)

[Sales History Report](#)

### Scale Precision

#### How SoapMaker stores and displays recipe quantities

You can enter ingredient quantities into your recipes in whatever units of weight or volume you want. SoapMaker converts and displays them in your chosen **calculated weight units**, and saves your recipes with a high degree of precision.

When you open a previously saved recipe, or resize a recipe, SoapMaker uses the saved precise quantities to recalculate and display your previously **entered quantities**, and the equivalent **calculated weight unit quantities**. These calculated quantities are rounded to a sensible number of decimal places based on your chosen calculated weight units and scale precision. This avoids displaying numbers with useless long strings of decimals.

Normally, you set your desired **calculated weight units** and **scale precision** to match the weigh scale you use in your process. You can do this for individual recipes on the **Options** tab of the [recipe form](#), and in [MyPreferences](#) for all new recipes of a given type.

Note: If you enter a small fractional quantity (e.g. **0.25 tsp**) in a recipe but your scale precision is set too low, the next time you open the recipe, your entered value may display as **0.3 tsp**, or even **0 tsp** (even though the correct quantity is still saved). To avoid this, all you have to do is increase the scale precision

option to show more decimal places (just for this recipe, or for all recipes), and then re-open the recipe. For more information, see the topic [Recipe Options...](#)

## Sharing your Database

### **Pro** Share your data with another user account or computer

Your recipes and inventory information are all saved within SoapMaker's [database](#) file. This file is normally kept in your private AppData or Program Data folder. This is a special hidden Windows folder which cannot be accessed by other users.

If you want to be able to share the same data with another user account on your computer, or with another computer connected on a local network or sharing a cloud storage service, you can set this up with the **Move/Share Data** command under the **File** menu.

(Note: Your SoapMaker [license](#) entitles you to install SoapMaker on 2 computers for your own use.)

### Limitations

- To be able to use a shared database, you must have **read and modify** access permission to the location, and the database file must be named **SM3Data** with filetype **.sdb**.
- Only one copy of SoapMaker may access the shared database at one time.
- When sharing a database which resides on another computer, you may see some performance degradation, especially with tasks that require many database accesses such as updating all recipes.
- When you 'move' your database, a copy is made and the original remains in the previous location.

### Caution when using Cloud Storage for sharing

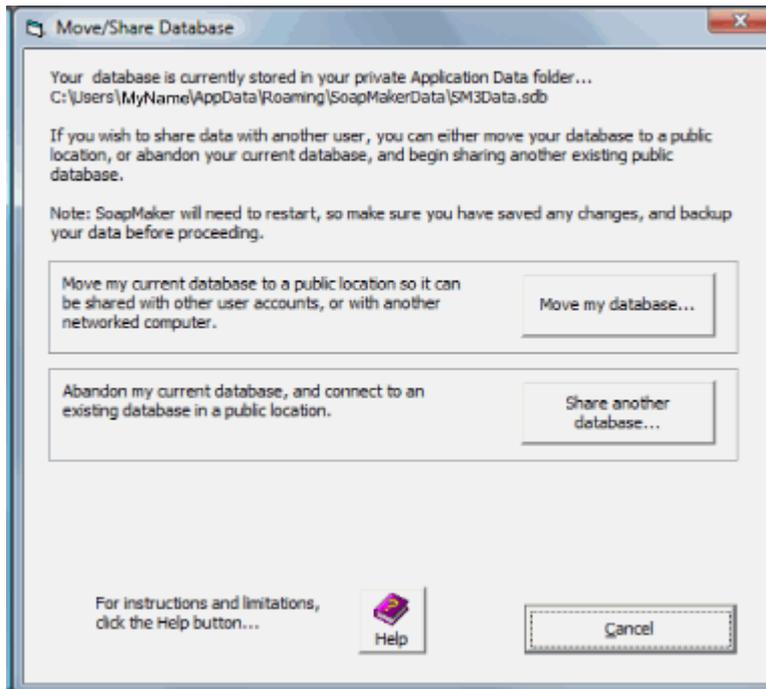
Using cloud storage (e.g. Dropbox, OneDrive, Google Drive) to share your database is an effective way to keep two remote copies of SoapMaker in sync. But if you choose to do this, it is important to understand how it works or you could lose data. With a cloud storage service, each computer will have a local copy of the database file, and these copies are synced automatically so any change to one will affect the other.

When you share a physical database file between 2 computers on a local network, you are prevented from opening 2 copies of SoapMaker at one time - if you try to do this, you will see a message. But if you use a cloud storage service to share your database SoapMaker has no way of detecting or preventing another copy of SoapMaker from running on another computer at the same time with the shared database. If you do this, the local database copies will have different content, and when the cloud service syncs the local files, data may be lost. To prevent this, you **must** ensure that only one copy of SoapMaker is running at a time, and that the database file has been successfully synced after making changes before starting the remote SoapMaker program.

**Please Note:** At the time of writing, **Google Drive** provides inconsistent results when syncing the SoapMaker database file. It is not recommended to keep your main database file location within your Google Drive folder. Instead, you can change the storage location to your desktop or other convenient location, and after making any changes within SoapMaker, close the program and drag a copy of your database file into the Google Drive folder for sharing. When syncing is done, on the other computer, you can copy the synced file out of Google Drive and then use the Restore Data command in SoapMaker to load the updated database.

### To Start Sharing

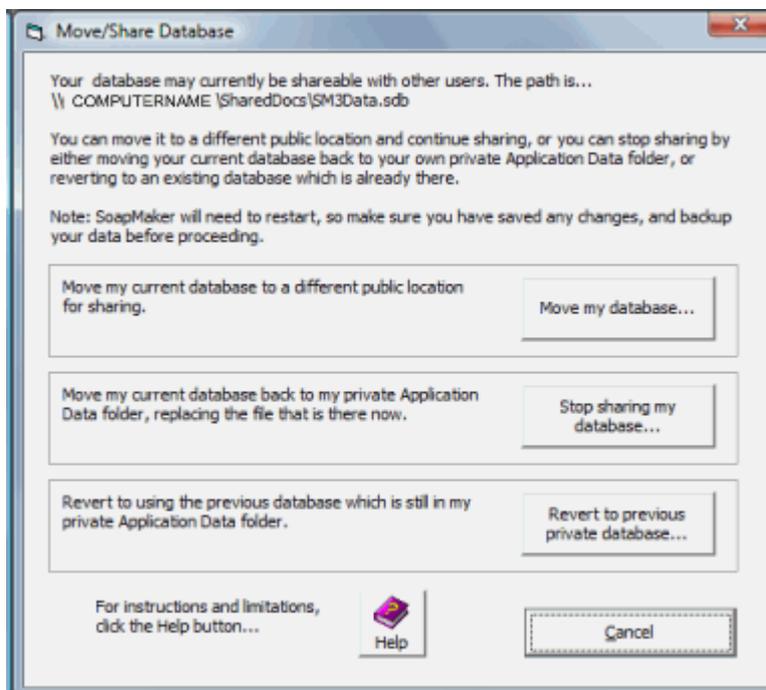
If your database file is currently in the normal location, the **Move/Share Data** dialog looks like this...



You have the option to either **move** your own database to a public location where it can be shared, or **abandon** your current database and begin sharing another existing database.

### To Stop Sharing, or Change the Shared Location

If your database is **not** currently in the normal location, the **Move/Share Data** dialog looks like this...



You now have three options. You can choose to:

1. move your current database to a different public location,
2. move your current database back to the normal private location, replacing the earlier file that is already there, or
3. abandon your current shared database and revert to using the earlier existing database in the normal private location

### Possible error conditions

You may see an error message if:

- you attempt to share an existing database file which is in a location to which you do not have write privileges
- you attempt to share a database which is currently being used by another SoapMaker user
- you start SoapMaker when the shared database location is unavailable

If you have trouble getting it to work on a local network, see the topic [Sharing on a local network](#) for assistance.

### See also:

[Preserving your Data](#)

## Sharing on a local network

### **Pro** Share your data with another computer on a local network

Network sharing with Windows 10 can be really confusing! Follow these steps to get it working...

1. Set up a **Home Group** starting with the computer that will **host** your database
2. Add your other computer to the home group.
3. On the **host** system, create a folder somewhere (e.g. in your Public folder or in your Documents) as the new location for your database.
4. In SoapMaker use the **File/Database/Move or share data** command to move your database to the new folder you created.
5. Close SoapMaker
6. Make sure this new folder, and the database file within it can now be shared with **read/write** access:
  - a) right-click the folder and choose **Properties...**
  - b) click the **Share...** button
  - c) if you have set up a home group, you should see a **HomeUsers** item. Click this and select **Read/Write** permission level. Click the **Share** button.
  - d) Right-click the database file (SM3Date.sdb) in the shared folder, and choose **Properties...**
  - e) In the **Group or User names** list, select **HomeUsers** and then edit the permissions to allow **full control and Modify** permission.

Now you should be able to open SoapMaker on the other computer, and use the **File/Database/Move or share data** command to share the host computer's data.

## Specific Gravity Topics

### Please choose a topic:

[What is Specific Gravity, and Why is it Important?](#) - A brief explanation of what this means, and why we need this.

[Common Substance Specific Gravity and INCI Values](#) - A list of common ingredients and their **specific gravity** as well as their International Nomenclature of Cosmetic Ingredients (**INCI**) names.

[Measuring Specific Gravity](#) - If you can't find an ingredient's SG in our list, by asking your supplier, or by searching the Internet, you can measure it yourself by following these guidelines.

### Specific Gravity - Why is it Important

#### What is Specific Gravity, and Why is it Important?

The **specific gravity (SG)** of a substance is the ratio of its **density** to that of water. Water has a specific gravity of **1**. Oils are slightly lighter than water, and generally have a specific gravity around 0.9 to 0.95. SoapMaker uses **Specific Gravity** to implement several features:

- You can record your **supply purchases** (and track your stock) by **volume** if that's how you buy them. e.g. If you buy a gallon of oil, you can record the price you paid per gallon, and SoapMaker will tell you how many gallons are left in stock each time you make a batch.  
If you record a purchase in volume units (e.g. fluid ounces, gallons, liters or ml), the SG is important because internally SoapMaker always saves unit cost as **cost per gram**, even if you choose to display it in volume units. If the SG is wrong, the conversion from the volume units to grams will be wrong, and so will the unit cost.
- You have the option to enter **recipe quantities** in **volume** units (cups, Tbsp, etc.) and SoapMaker will convert to weight units (e.g. oz or lbs).  
**Note:** Using volume measures for **dry** or **granular** ingredients is inherently inaccurate because of entrapped air - use weight measures instead.
- You can specify your **product size** in volume units. (e.g. if you make liquid soap and sell it in 10 fl oz bottles, you can tell SoapMaker your "portion size" is 10 fl oz and it will calculate the number of portions in a recipe and the cost per portion.)
- You can have SoapMaker **resize a recipe** to fit a mold.

All of these features involve conversion between weight and volume, and this can only be done accurately if we know the SG of each ingredient.

If you never use any of these features, and only deal with weight measures, then you don't have to be concerned with SG. You can just enter 1 as the SG for all your additives. Your costs and product batches will be calculated correctly. The displayed recipe volume numbers may be inaccurate, but you can ignore them.

SoapMaker comes with the SG already specified for each base oil, for lye, and for some example additives. When you add a new ingredient to MySupplies, you need to enter a valid (non-zero) SG value.

## Related Topics

[Common Specific Gravity and INCI Values](#) - A list of common ingredients and their **specific gravity** as well as their International Nomenclature of Cosmetic Ingredients (**INCI**) names.

[Measuring Specific Gravity](#) - If you can't find an ingredient's SG in our list, by asking your supplier, or by searching the Internet, you can measure it yourself by following these guidelines.

## Common SG and INCI Values

Here are the **Specific Gravity** values and **INCI names** of some common ingredients, listed in these categories:

[Base Oils](#)

[Essential Oils](#)

[Fragrance Oils](#)

[Clays, Mica](#)

[Chemicals and Preservatives](#)

[Miscellaneous Additives](#)

## Related Topics

[What is Specific Gravity, and Why is it Important?](#)

[Measuring Specific Gravity](#)

[INCI Names](#)

## Base Oils

| Name [INCI name]      | Specific Gravity |
|-----------------------|------------------|
| Goat Milk [Goat Milk] | 1.032            |
| Lanolin [Adeps lana]  | 0.9              |
|                       |                  |

## Essential Oils

| Name [INCI name]  | Specific Gravity |
|---|------------------|
| Amyris [Amyris Balsamifera]   | 0.96             |
| Basil, Sweet [Ocimum basilicum]                                     | 0.95             |
| Cardamom Seed [Elettaria Cardamomum]                                | 0.93             |
| Carrot Seed [Daucus Carota Sativa]                                  | 0.91             |
| Cedarwood, Atlas [Cedrus Deodara]                                   | 0.98             |
| Clary Sage [Salvia Sclarea]   | 0.9              |
| Clove Bud [Eugenia Caryophyllus]                                    | 1.038            |
| Copaiba Balsam [Copaifera officinalis balsam]                       | 0.936            |
| Eucalyptus [Eucalyptus Globulus]                                    | 0.919            |
| Lavender 40/42 [Lavandula Angustifolia]                             | 0.89             |
| Lavender [Lavandula Angustifolia]                                   | 0.89             |
| Lemon 5 Fold [Citrus medica limonum] lemon peel oil                 | 0.875            |
| Lichen extract [Usnea Barbata]                                      | 0.9              |
| Lime [Citrus aurantifolia] Lime oil                                 | 0.855            |
| Litsea Cubeba [Litsea cubeba] may chang fruit oil                   | 0.89             |
| Marjoram, Sweet [Marjorana Hortensis]                               | 0.89             |
| Orange 15x Bergaptene Free [Citrus sinensis dulcis] orange peel oil | 0.865            |
| Orange 15x Clear [Citrus sinensis dulcis] orange peel oil           | 0.845            |
| Patchouli [Pogostemon Patchouli]                                    | 0.97             |
| Peppermint [Mentha Arvensis]  | 0.9              |
| Petitgrain [Citrus aurantium amara] orange leaf oil                 | 0.89             |
| Pink Grapefruit [Citrus paradisi] grapefruit peel oil               | 0.875            |
| Rose Geranium [Pelargonium graveolens]                              | 0.88             |
| Rosemary [Rosemarinus Officianlis]                                  | 0.9              |
| Rosemary, Tunisian [Rosmarinus Officinalis]                         | 0.915            |
| Tangerine peel [Citrus tangerina]                                   | 0.847            |
| Thyme, White [Thymus zygis]   | 0.914            |
| Ylang Ylang [Cananga Odorata] flower oil                            | 0.94             |

## Fragrance Oils

| Name (Note: INCI name for all FOs: [Parfum]) | Specific Gravity |
|--|------------------|
| Generic FO (typical average SG)              | 1.05             |
| Beer FO                                      | 1.039            |
| Black Raspberry Vanilla                      | 0.986            |
| China Rain                                   | 1.06             |
| Coffee Beans                                 | 1.11             |
| Dragons Blood                                | 1.032            |
| Green Apple                                  | 1.046            |
| Lily of the Valley                           | 1.055            |
| Midnight Jasmine                             | 1.064            |
| Neroli FO                                    | 1.06             |
| Pheromones                                   | 1.062            |
| Sandalwood Extra                             | 1.091            |

| <b>Name</b> (Note: INCI name for all FOs: [Parfum]) | <b>Specific Gravity</b> |
|---|-------------------------|
| Strawberry Patch                                    | 1.015                   |
| Twilight in the Woods                               | 1.02                    |
| Vanilla Del Madagascar                              | 1.119                   |
| Violet (Natures Garden)                             | 1.045                   |
| Violet (New Directions)                             | 1.026                   |

### Clays, Mica

| <b>Name</b> [INCI name]            | <b>Specific Gravity</b> |
|------------------------------------|-------------------------|
| French Clay [Montmorillonite]      | 2.5                     |
| Kaolin Clay [Kaolin]               | 2.6                     |
| Mica [Mica]                        | 2.7                     |
| Rhassoul Clay [Moroccan Lava Clay] | 1.9                     |

### Chemicals, Preservatives

| <b>Name</b> [INCI name]  | <b>Specific Gravity</b> |
|--|-------------------------|
| Alcohol, ethyl [Alcohol] or [Alcohol Denat.] if denatured  | 0.787                   |
| Alpha Lipoic Acid 99.53% [Thioctic Acid]   | 1.1                     |
| Borax [Sodium Borate]  | 1.7                     |
| Boric Acid [Boric Acid]  | 1.44                    |
| Citric Acid [Citric Acid]  | 1.54                    |
| Cyclomethicone [Cyclomethicone]  | 0.96                    |
| Dextrose [Dextrose]  | 1.046                   |
| Dimethicone [Dimethicone]  | 0.97                    |
| Emulsifying Wax [Emulsifying Wax NF]   | 0.8                     |
| Germall Plus Liquid [Propylene Glycol; Diazolidinyl Urea; Iodopropynyl Butylcarbamate]               | 1.2                     |
| Hyaluronic Acid [Sodium hyaluronate]   | 1.8                     |
| Isopropyl Myristate [Isopropyl Myristate]  | 0.85                    |
| Phenolphthalein 1% in ethanol  | 1.277                   |
| Phenonip [phenoxyethanol, methylparaben, ethylparaben, butylparaben, propylparaben, isobutylparaben] | 1.124                   |
| Polysorbate 20 [Polysorbate 20]  | 1.1                     |
| SLSA [Sodium Lauryl Sulfoacetate]  | 0.55                    |
| Suttocide A (preservative) [Sodium Hydroxymethylglycinate]   | 1.29                    |
| Vitamin A [Retinyl Palmitate]  | 0.9                     |

### Miscellaneous Additives

| <b>Name</b> [INCI name]                          | <b>Specific Gravity</b> |
|--|-------------------------|
| Bisabolol (Natural) [Bisabolol]                  | 0.93                    |
| Caffeine Powder 100% USP Pharma Grade [Caffeine] | 1.23                    |
| Carrot Juice [Daucus Carota]                     | 1.055                   |
| Chrysin [Chrysin]                                | 1.4                     |
| Cocoa Powder, Natural [Theobroma Cacao]          | 1.8                     |

| Name [INCI name]                        | Specific Gravity |
|---|------------------|
| Egg Yolk                                | 1.032            |
| Epsom Salt [Magnesium Sulfate]          | 1.7              |
| Glycerin [Glycerin]                     | 1.263            |
| Molasses                                | 1.036            |
| Oatmeal [Aveena Sativa]                 | 1.1              |
| Reed Diffuser Base                      | 0.837            |
| Salt [Sodium Chloride]                  | 2.165            |
| Sclerotium Gum [Sclerotium Gum]         | 1                |
| Sodium Bicarbonate [Sodium Bicarbonate] | 2.159            |
| Sodium Lactate 60% [Sodium Lactate]     | 1.33             |
| Sugar [Sucrose]                         | 1.587            |
| Witch Hazel [Hamamelis Virginiana]      | 0.98             |

If you don't see an ingredient here, try searching the Internet.

## Related Topics

[What is Specific Gravity, and Why is it Important?](#)

[Measuring Specific Gravity](#)

## Measuring Specific Gravity

### Measuring the Specific Gravity (SG) of Liquids

Use a Hydrometer to measure SG directly. If you don't have one, you can measure it as follows:

1. Weigh a known volume of the ingredient
2. Calculate its density (weight divided by volume)
3. Divide its density by the [density of water](#) to get the SG.

It's easier if you have a scale that measures in grams, and a container graduated in milliliters – the SG of an ingredient is the same as its density in grams per ml. Otherwise, see the table below for water density in different units

### Measuring the SG of Solids

1. Weigh a sample chunk of the solid material
2. Place water in a graduated container (e.g. measuring cup). Note the water level.
3. Completely immerse the sample in the water, and note the new water level. The volume of the sample is the difference between the water levels in Step 2 and Step 3.
4. Calculate the density of the material by dividing the weight of the sample from Step 1 by the volume measured in Step 3.
5. Divide its density by the [density of water](#) to get its SG.

### Powders and Granular materials

It is difficult to measure the SG of these because it requires mixing them with a liquid that will not dissolve them, or compacting them into a solid block. If you cannot find the correct SG, just use 1.

For accuracy, enter these ingredient quantities using weights rather than volume measures.

The **density of water** is:

- 1 gram per milliliter
- 1.043 ounces per US fluid ounce
- 8.35 ounces per US cup
- 16.7 ounces per US pint

## See Also:

[What is Specific Gravity, and Why is it Important?](#)

[Common SG and INCI Values](#)

## Suggested Reading

### Some good sources of information about soapmaking...

#### **The Soapmaker's Companion:**

A Comprehensive Guide With Recipes, Techniques

- by Susan Miller Cavitch

#### **The Natural Soap Book:**

Making Herbal and Vegetable-Based Soaps

- by Susan Miller Cavitch

#### **Making Natural Liquid Soaps**

- by Catherine Failor

#### **Making Cream Soap:**

A guide to creating all-natural shaving, hand and body cream soaps

- by Catherine Failor

#### **Scientific Soapmaking:**

The chemistry of the cold process

- by Kevin M. Dunn

## Understanding SAP Values

Each [Base Oil](#) used to make soap has a specific **Saponification (SAP)** value which indicates how much lye is required to fully saponify (make into soap) a given quantity of the oil.

SoapMaker uses SAP values determined by industry research and expressed as the number of grams of **Sodium Hydroxide (NaOH)** needed to saponify a gram of oil. For example, olive oil has a SAP value of 0.135, which means that it takes 135 grams of sodium hydroxide to saponify a kilogram of olive oil.

For liquid and cream soap recipes using **Potassium Hydroxide (KOH)**, the SAP values are calculated from the stored NaOH SAP values using the formula:  $KOH\ SAP = NaOH\ SAP \times 1.4025$ .

Because oils may vary between sources, or even between different batches from the same source, SAP values are usually published as a range for each oil. The values used by SoapMaker are generally averages of published ranges. because of this variability, it is recommended to use a lye [discount](#) of at least 4% in recipes unless you include Additives for [superfating](#) or neutralizing any excess lye.

Note that suppliers often provide SAP values stated in grams of potassium hydroxide (KOH) per kilogram of

oil, whereas SoapMaker makes use of SAP values stated in grams of sodium hydroxide (NaOH) per gram of oil. So if you want to customize SoapMaker by adding a new oil, you need to know whether the SAP value you have is for NaOH or KOH, and in what units it is measured. To add it to SoapMaker you may have to convert it to NaOH, and make sure the units are grams per gram. The conversion between the two methods is given by the formula:

$$\text{SAP for NaOH in grams/gram (as used in SoapMaker)} = \frac{\text{SAP for KOH in grams/Kg}}{1402.5}$$

## Updating from Version 2

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This section is for users updating from SoapMaker version 2

### Topics:

[What's New in Version 3](#)

[Importing your SoapMaker 2 Database](#)

### See also:

[Getting Started with SoapMaker 3](#)

## What's New in Version 3

### What's New in Version 3

Just about everything! With a new look, and many new features and improvements, SoapMaker 3 is easier to use and more capable than ever.

Take some time to browse through this list of changes, and to explore the program using the samples provided in the installed database. Then when you're ready to use it, import all your data from your old SoapMaker with one command. (See [Importing your SoapMaker 2 Database](#))

### A New Look

The new task-oriented interface now makes extensive use of toolbars and pop-up (right-click) menus so you can accomplish common tasks quickly and easily without having to go searching through the main menus. **Context Help** buttons take you immediately to the Help topic which describes the current task.

It is no longer necessary to set your system to US style numbering. SoapMaker 3 supports international numbering systems and currency symbols.

There are three **management centers** which provide easy access to all the information and commands associated with a particular activity:

#### MyRecipes

The recipe management center now includes a hierarchical view showing recipe **Groups** (previously called "Classes") as folders, and recipes as documents. You can drag a recipe from one group into another, or use the **Move Recipes** button to move a bunch of recipes all at once.

The recipe icons indicate each recipe's type (**S**olid soap, **L**iquid soap, **C**ream soap or **N**on-soap). Yes that's right -SoapMaker 3 now supports Cream soap recipes!

In the List view, you can choose to list all recipes in the selected group, or only recipes of a particular **type**.

The **Archive** group is now given special treatment. When you list "All Recipes" in MyRecipes or MyProducts, any recipes in the Archive group are not shown. You can still

list recipes in the Archive group itself. Use this group to save old recipes you don't use anymore, but want to keep for reference. When you use the new **Update Recipes** feature to capture the latest supply costs, archived recipes are omitted to save time.

## MySupplies

This new Supplies management center consolidates the old **MyShelf** and the various **Ingredients** dialog windows of version 2. Everything to do with adding ingredients, purchasing supplies, and tracking usage is done from here.

A new supply type, "Packaging" has been added. Use this for all your labels, bottles, etc.

Additive ingredients can now be organized into **Categories**.

Special icons show at a glance when a supply is getting low or is all used.

You can safely rename an ingredient, and the new name will automatically appear in all affected recipes. Want to know which recipes use a particular ingredient? Just click the **Recipes** button to see a list.

When you receive a new shipment of supplies, record the cost and amount of each item, as well as the total shipping cost, tax, etc. and SoapMaker will calculate the actual adjusted cost of each supply.

**Pro** When you record a new purchase of a supply item, the total value of your stock of that item (old and new) is calculated using the latest adjusted cost. Therefore it represents the "replacement cost" of your stock. (In version 2, the existing value of old stock was added to the new stock's value.)

The **Purchase History** report for each supply shows every purchase you made, when you made it, the name of the Supplier and the quantity and cost of the purchase. **Pro** With the Pro edition, it also shows the quantity still left in stock from that lot.

**Pro** The **Usage** report lists all batches made with a selected ingredient within a specified time period.

That annoying reminder to re-save affected recipes every time you record a new sale is gone for good! Now you get one optional reminder after all changes are made, and SoapMaker 3 will update all your recipes at once.

Base Oils properties now include the **fatty acid composition**, and this is used to compute the graph quality numbers. If you add a new oil and can find out the fatty acids, enter them yourself to get the correct qualities. Or you can have SoapMaker 3 copy all the properties of an existing similar oil.

You can change the SAP value or any other property of a Base Oil, even if it is a standard oil included with SoapMaker. You can always **Revert** back to the standard values.

If you have added a custom oil which is similar to one of the standard oils provided with SoapMaker, you can **merge** them into one using the Merge Oils command.

**INCI** codes are provided for all the standard Base Oils provided with SoapMaker, and you can add INCI codes for any new oils or additives you create.

## MyProducts

**Pro**

Each product batch can now be split into as many as four "sub-batches", each with different sized bars or portions. You can now choose a date range for viewing or printing your list of batches (handy at tax time). You can also restrict the list to batches which still have remaining stock

You can create a **sales record** for each customer order or sales venue, and include products from any batch. You can then create a customer **invoice** to bill your customer. On the list of invoices you can track whether each has been paid or not.

A **Sales History** report shows every product sold, when and to whom (or where) it was sold, the batch and recipe it came from, the price you charged, and your profit margin.

## Recipe Form

The recipe form has been extensively reworked to provide a less cluttered task-oriented interface. Separate pages with tabs are provided for each ingredient type, including the new **Packaging** type.

An **Options** page enables you to change preferred units, etc. without having to open the main Preferences window. From here you can also set the recipe to be your "benchmark" on the qualities graph.

The **Fatty Acid Composition** of the recipe is displayed and can be included when you print the recipe.

You can now specify either the **size** of bar/portion or the total **number** of bars/portions in the recipe. The recipe summary information also includes the **volume** as well as the weight.

You no longer have to put up with many useless decimal places. You specify your scale's **precision**, and calculated quantities are automatically rounded to match. Calculated weights can now be expressed in fractional pounds as well as pounds-ounces.

True **autofill** makes it easier to fill in a recipe form. When you start typing an ingredient name or units, SoapMaker 3 fills in the rest with the best match from the available list. To keep the drop-down list of Base Oils short, it only includes those oils you choose as your "favorites". You can add more at any time by selecting the "More Oils" item from the list.

Additives are now organized into **Categories**. Create as many categories as you like (e.g. scent, color, etc.) to keep the recipe drop-down lists short for easy entry.

**Packaging** items are now entered on a separate page. For each entry, you can specify either the **total number** of items in the recipe, or the **number per bar/portion**.

There is now virtually no limit to the number of ingredients in a recipe. The recipe form adds more rows as you need them.

New recipes are named and assigned to a group when you **save**, just as in other Windows applications.

The quantity of water in soap recipes can be controlled either by specifying a discount as before, or by specifying the desired lye **solution strength**.

A new **fragrance calculator** is built into the Recipe form. It suggests an amount of fragrance based on the total amount of base oils. You can set your preferred fragrance ratio for each type of recipe.

A new **Cream soap** recipe type is available. It enables you to include both NaOH and KOH lye in the same recipe.

When you create a new Liquid or Cream soap recipe, a special **calculator** is available to help with process-specific ingredients.

Recipe printouts can include the list of **INCI codes** used in the recipe (sorted by quantity), and the fatty acid composition of the recipe.

You can **export** a recipe's ingredient list with INCI codes which can be edited and used for labels.

## Resize Recipe

New options are available for resizing a recipe. You can now resize to:

- Total recipe weight
- Total Base Oils weight
- Total volume
- Percentage of original size
- Number of bars/portion of specified size
- Fit any quantity each of up to 4 different molds

When resizing to fit molds, you can override the default waste allowance (specified in MyPreferences). When you resize a recipe, SoapMaker 3 always opens a **copy** for resizing, so the original recipe is unchanged.

The **New Mold** dialog window now provides the option for you to select the type of mold, enter mold dimensions and have the volume calculated for you.

## Graph

The Predicted Soap Qualities Graph has a new look with 3D colored bars. The new **Auto-scale** option will scale the graph to accommodate the largest value instead of always scaling to the maximum of 10. The graph window now indicates the name of your current benchmark recipe. When several recipes are displayed on the graph, you can see the numbers for a particular recipe by moving your mouse over one of the colored bars.

The graph can now be printed.

## Printing

A new **Print Preview** option is available whenever you print a recipe, an invoice, or one of the list reports.

## **Pro** Batches

You can make a batch for a selected recipe in MyRecipes, or repeat a batch in MyProducts, without having to open the recipe.

When you make a batch, the quantity to be used and the quantity which will remain in stock are shown for each ingredient. Special icons flag any ingredient which you may need to re-order (based on minimum quantities you set). You have the option whether to adjust your supplies inventory for any or all ingredients in the recipe. For each ingredient you want adjusted, the quantity is deducted from your supply stocklist, starting with the oldest purchase record which still shows stock remaining. On the **Purchase History** report, the purchase record which will be used for the next batch is flagged with an arrow.

When making a batch, you can now override the default waste factor (set in MyPreferences), and you can change the "date made" in MyProducts

## Preferences

The new **MyPreferences** form includes many new options, and is organized by recipe type, so you can specify different default values for each type. You can access this form anytime by clicking the "Prefs" button on the main toolbar. On a Recipe form, the Options page allows you to override the defaults you have set in MyPreferences, and if you like, you can save the new options in the Recipe form for all recipes of the same type without having to open MyPreferences.

## Supplier and Customer lists

You can maintain lists of your **Suppliers** and your **Pro Customers** (and sales venues), and record contact information. When recording supply purchases or product sales, you can enter the Supplier or Customer

Name by selecting it from a drop-down list.

### **Pro Shopping List tool**

This new production planning tool determines what supplies you need to purchase to make planned recipes.

### **Base Oils**

SoapMaker3 comes with more than 80 base oils defined. To keep the list manageable, you can select your **favorites** which will appear in the **MySupplies** stocklist and be available in recipe oil drop-down lists.

There have been a couple of SAP value adjustments to reflect current industry standards. The Olive oil SAP has been increased from 0.134 to 0.135. The new Olive Pomace has a SAP of 0.134. Coconut has been reduced from 0.19 to 0.18. These changes may result in slight differences in the lye and water amounts in existing recipes.

### **Pro Blends and Infusions**

Create custom blends or infusions using 2 or more ingredients, and save the blend as an ingredient that can be used in your recipes.

### **Pro Taxes**

SoapMaker3 provides features to help you track and report income tax, and sales tax or value-added tax.

### **Lye Specific Gravity**

The specific gravity of NaOH and KOH have been corrected. This may result in slight differences in recipe volume calculations (e.g. when you resize to fit a mold).

Next topic: [Importing your 2.8 Database](#)

## **Importing your SoapMaker 2 Database**

### **Importing your Database from SoapMaker 2.x**

If you are updating from SoapMaker version 2, you can import your complete database of recipes, ingredients and batches into SoapMaker 3. This will replace all the sample data included with the SoapMaker 3 installation, and any changes you may have made while exploring the new program.

Note that your old database will not be changed, and the old version of SoapMaker will still be available until you decide to uninstall it.

If your old SoapMaker **database version** is prior to 3.2, you will have to first download and run the DBpatcher before the database can be imported. (See [How do I know what version I have?](#)) This is a free tool available from [www.soapmaker.ca/V2update.php](http://www.soapmaker.ca/V2update.php)

Importing your old database is a one-time event. Once completed, you're ready to start using SoapMaker 3.

Important: Although SoapMaker 3 supports international numbering systems, the old version of SoapMaker did not. So if you have set your system to use a numbering scheme with a comma as the decimal point, you must close SoapMaker 3 and set your Control Panel Regional and Language Options to 'English US' before importing your old database. Once you have completed the import, you can close SoapMaker 3 and change the setting back to suit your country.

When you are ready, follow these 5 steps:

1. If you do not already have a backup copy of your old SoapMaker 2 database, make one now by opening SoapMaker 2 and choosing **Backup Data** under the **File** menu. Close SoapMaker 2. (Note: If you no longer have SoapMaker 2 installed, you may still be able to locate your old database file - see [Where is](#)

[my old database](#) for guidance.)

2. In SoapMaker 3, choose **Import Database from Version 2** under the **File/Database...** menu. You will be asked to locate your old database file. Select your latest backup copy wherever you saved it.
3. Once the import is completed, a **report** will be displayed. We suggest you save this report for reference, as it will probably describe some actions you will want to complete before starting to use the program on a regular basis. (See the note below about recipes that need attention.)
4. SoapMaker 3 provides more preference settings than the previous version. Make sure you have your preferences set the way you want them before continuing. Just click the **Prefs** button on the main toolbar - notice that there are different setting for each recipe type.
5. Now you can have all your recipes updated to reflect your preference settings, and your latest ingredient costs. Select **Update Recipes...** under the **Recipes** menu. This may take a few minutes if you have many recipes.

That's it! You are ready to start using SoapMaker 3.

## Custom Oils

SoapMaker 3 has many more standard base oils than before. If you had added your own custom oils in SoapMaker 2, then when your database is imported either of the following may occur:

1. If there is **no standard oil** with exactly the same name as your custom oil, it is imported as a [custom oil](#). If it is similar to one of the new standard oils included with SoapMaker, you may want to use the [Merge Oils](#) command to combine them.
2. If your custom oil has the **same name** as a standard oil now included with SoapMaker, the properties you specified were imported, and **replaced** the standard oil properties. You have the option to **revert** to SoapMaker's standard properties for this oil. (See the [Oil Properties](#) topic.)

## Recipes that need attention

After importing your old database into SoapMaker 3, some of your recipes may have been placed in a special group called **Need Attention!**. The usual reason for this is because the recipe referred to ingredients which were not found in your old database. This could occur if you had entered a non-existent ingredient when creating the recipe, or if you had renamed or deleted an ingredient after saving the recipe. (Recipes may also need attention if they contained invalid weight or volume units, or an invalid pre-mixed lye ratio.)

Note: SoapMaker3 will not allow you to enter non-existent ingredient names in recipes, or to delete an ingredient from your database if it is used in saved recipes. If you rename an ingredient, the new name will automatically appear in any recipes that use it.

In order to preserve your imported recipes that refer to non-existent ingredients, new "dummy" ingredients were created in MySupplies - they are flagged with \*\* in front of their names.

To clean up the affected recipes, follow these steps:

1. Open MySupplies
2. Look for items flagged with \*\* before their names in the Base Oils, Additives, and Packaging lists. (On the Additives tab , select the **View as Sortable List** option.) When the list is sorted by name, all the flagged names will appear at the top.
3. To see the recipes using a particular item, select it and click the **Recipes...** button on the toolbar. This will open the [List Recipes with specified ingredient](#) report. When you select a different item, the recipe list will change accordingly. Leave the report open for the remainder of this process.
4. For each flagged item in MySupplies, you need to decide whether:
  - a) This is an old name for a renamed ingredient you still have in stock, OR
  - b) You don't have this ingredient now, but you want to keep recipes that use it, OR
  - c) You don't want this ingredient or any recipes that use it.

If a) [This is an old name for a renamed ingredient you still have in stock](#) then...

- Select the flagged ingredient name in *MySupplies* to see the list of recipes
- For each recipe listed, open the recipe by double-clicking it in the **Recipes with Selected Ingredient** list or clicking the **Open** button.

- In the recipe, locate the flagged ingredient and replace it with the correct renamed ingredient from the drop-down list.
- Save the recipe and close it
- Click the **Refresh** button - the saved recipe should no longer show in the list
- When all recipes have been changed, and the list is empty after clicking **Refresh**, you can the **Delete** the flagged ingredient from *MySupplies*.

If **b) You don't have this ingredient now, but you want to keep recipes that use it then...**

- Select the flagged ingredient name in *MySupplies*
- **Rename** it to remove the \*\*
- Set any properties, such as [specific gravity](#). (If this is a Base Oil, you can copy all the properties from a similar oil)
- All recipes that use this ingredient will now reflect the new name and properties.

If **c) You don't want this ingredient or any recipes that use it then...**

- Select the flagged ingredient name in *MySupplies* to see the list of recipes
- Select each recipe listed and click the **Delete** button, or right-click and choose **Delete Recipe** from the pop-up menu.
- When all affected recipes have been deleted, and the list is empty, you can the **Delete** the flagged ingredient from *MySupplies*.

5. When you have dealt with all affected recipes, open MyRecipes and move them from the **Need Attention!** group to other groups of your choice.

**For an overview of SoapMaker 3 see:** [Getting Started with SoapMaker 3](#)

## Where is my old database?

### Locating Your Old Database from SoapMaker 2.x

If you no longer have SoapMaker 2 installed, you may still be able to locate your old database file so you can import the contents into your new SoapMaker 3:

1. Open the SoapMaker program folder located at...  
Computer / Local disk (C:) / Program Files / SoapMaker. In this folder, you should see the database file **Soapdata.mdb**.
2. IMPORTANT: If you see a **Compatibility Files** button on the taskbar near the top of the SoapMaker window, go to **step A**, otherwise go to **step B**.
  - A. If your system is Vista or later, and you have User Account Control turned on (the default setting), then Windows will have created a copy of your database file in a special folder. In this case, you will see a Compatibility Files button indicating there is a hidden file related to this folder - this is where all your recipes, etc. are stored (**not** in the SoapMaker program folder).  
Click the **Compatibility Files** button - you should now see a window containing your working database file Soapdata.mdb. Drag the file from the compatibility files folder to a known location such as the desktop ready to be imported by SoapMaker 3.
  - B. If you have not been using Windows Vista or later with User Account Control turned on, then simply copy your database file Soapdata.mdb to a known location such as the desktop ready to be imported by SoapMaker 3.

Now continue with [importing your SoapMaker 2 database...](#)

## Company Information

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This section includes:

- how to get online **help**,
- a brief **history** of SoapMaker development, and
- the text of the **Licence Agreement** included with the program.

Expand the section heading at the left to see the list of topics.

### Getting Help

If you have a question or problem, and cannot find an answer in this document, visit the [SoapMaker website](#) where you can access the **knowledge base** or contact us for technical support.

### SoapMaker history

Woodman Designs is a small family business owned and operated by Diane and me. Diane makes handmade soap under the name Brooke Valley Soap.

To help with the soapmaking, we developed a spreadsheet calculator called "SoapCal" to create recipes and calculate lye and water amounts. After some unsatisfactory batches of soap, we felt we needed something more, so we did some extensive research into the properties of various oils used to make soap, and the effects that each oil type would have on the resulting soap qualities. By developing a unique graphical representation of soap qualities, we were able to "test" a recipe before making the soap, and to compare different recipes.

Diane shared the spreadsheet with several soapmaking friends on internet forums, who quickly came to depend on it. Their positive response convinced us we would like to share it with a wider audience. However, the spreadsheet form had a number of limitations. So we decided to undertake the development of a stand-alone program version, with the enthusiastic help of a young programmer, Jason Bowles.

As the program design began to take shape, we strove to remove all the limitations of the spreadsheet, and to add the most-asked-for feature – inventory management. Since Jason has a background in inventory control systems, this was a natural extension for him.

SoapMaker was released for sale in July, 2003. The enthusiastic reception of SoapMaker Version 1 encouraged us to add more features and make some changes in response to user feedback. These were included in Version 2, first released in 2004. Since then, several improvements and new features were added until version 2.8 became the stable offering.

Eventually Jason moved on to other adventures. Meanwhile we were compiling a growing list of features and improvements we wanted to add to the program, in response to requests from users. I decided to tackle it myself.

It soon became apparent that structural limitations in the original code made it unsuitable for many of the new features envisioned. So I began a complete re-write of the program, which took about a year and a half. The result was SoapMaker 3, released in early 2009.

Since then, there have been continual updates to make improvements and add new features in response to user suggestions.

We sincerely hope that you will find it helpful and enjoyable to use, and welcome comments and suggestions for further improvement.

Crawford Woodman

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