



Peter Sadler Removals and Logistics  
3 Cyanamid Street Laverton North VIC 3026  
13 SADLER (13 72 35)

[warehouse@petersadler.com.au](mailto:warehouse@petersadler.com.au)  
[operations@petersadler.com.au](mailto:operations@petersadler.com.au)  
[orders@petersadler.com.au](mailto:orders@petersadler.com.au)

## Creating a Sale Order

Sales Orders are for any stock coming out of PSR&L's warehouse, you will mainly use this to organise stock to be delivered from us to your customer. You can also use a Sales Order for rep pickups or external carrier collections.

Please click the following link for step by step instructions on how to create a Sales Order. (The video on the link has a brief demonstration as well as more detailed instructions below)

<https://help.cartoncloud.com/pages/viewpage.action?pageId=37519708>

## Introduction

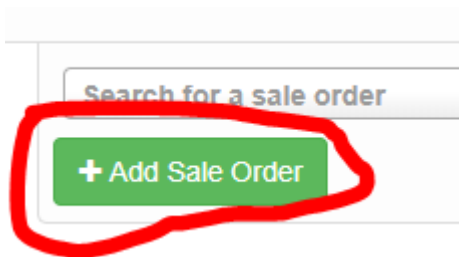
To have stock picked, packed and sent to a customer, you need to fill out a Sale Order.

To do this, you can simply login to the CartonCloud system and enter your Sale Order directly. This makes it fast and easy because you can search for available stock directly, choose specific expiry dates and batch numbers (where applicable), and save time by reusing addresses existing.

When Sale Orders are added to CartonCloud via the website, they initially go into a 'Draft' status. While they are in draft they can be edited and modified (products can be added, removed and quantities updated). Once you have completed the Sale Order you must mark it 'Approved', at this point the order will be available for warehouse staff to begin packing. If you need to make changes after you finalize the Sale Order, you'll need to get in contact with us.

## Adding a new Sale Order

Click on Warehouse->Sale Orders on the Top Navigation menu, then click the green button, 'Add Sale Order'.





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You'll now see the Add Sale Order screen.

**Reference:** All Sale Order References must be unique, duplicate reference numbers are not allowed. If you are sending the 2<sup>nd</sup> part of an order and wish to use the same reference number, we recommend adding something to the end, for example '-A'. So reference 0028376 would become 0028376-A.

**Address:** Search for an address already in the system, if you can't find what you are looking for click the "Add New Delivery Address" button and follow the prompts to add the address.

**Pick up from Warehouse:** Select this option if you will have someone else collecting this order from the warehouse. (Rep pickups or external carriers)

#### **Advanced Options:**

**Packing instructions:** Do you have any special instructions for our packing staff? (example: "please include beer lines and tap decal with kegs")

**Delivery Instructions:** Do you have special instructions for our delivery drivers? (example: "deliver after 11am, deliver via rear lane – blue door, press doorbell on arrival") **NOTE: Also to be used for reference numbers/connote numbers if an external carrier/third party is to collect stock from us, ie; Camerons collecting stock, Connote# 13456789**

**Save instruction as default instructions for this delivery address:** Tick to include these instructions every time we deliver to this address.

**Sale Order Value:** Not required

**Cash On Delivery:** Yes or No (additional charges apply)

**Required Delivery Date:** If your customer requires the delivery to be made on a specific day, you can enter this date here. If our delivery runs don't run on the day you specify, we may need to make changes to this date.

**Order Urgent:** If it is after 1:00pm and you need to guarantee that the order is picked that day, check the box. Generally any Sale Order received by 1pm will be packed on the same day. Sale Orders received after this time, but before 4pm may be packed (depending on volume of other warehouse work), however they can also be actioned as "Urgent" to ensure they are packed that day (may incur additional charges).  
Sale Orders received after 4pm are not typically picked that day.



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Once you have

filled out all the information, click 'Add Sale Order'.

## Adding Products to a Sale Order

What you want picked, how many you want picked, and other features like Expiry and Batch number selection can be performed when adding Products to the Sale Order.

To add products, simply click the Products tab while viewing the Sale Order, and then click the 'Add Product' button.

**View Sale Order**

Sale Orders >> Sale Order 10079

[Details](#) **[Products](#)** [Charges](#) [Consignments](#) [Errors](#) [History](#)

Sale Order Products:

**[+ Add Product](#)**

| CODE | Product Name | Take | Measure | Expiry Date | Batch Number | Product status | Actions |
|------|--------------|------|---------|-------------|--------------|----------------|---------|
|------|--------------|------|---------|-------------|--------------|----------------|---------|

## Searching for Stock

You'll now need to search for available stock which you can add to the Sale Order. Simply enter the quantity you wish to add, choose the product from the dropdown, and select the Unit of Measure on the right. You can also search by expiry or batch number on the "Search By Other Fields" tab.





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## Add Product to Sale Order - Search Product Stocks

Sale Orders >> Sale Order 58 >> Search Product Stocks

Search By Product    Search By Other Fields

QTY:     PRODUCT:     MEASURE:

Search

Once you have searched for stock you'll be shown available stock that you can choose from. Pay close attention to the batch/expiry dates, Carton Cloud will default to the stock with the shortest expiry (FEFO) or the stock that has been in the warehouse longest (FIFO) depending on the product. You can modify the quantities as you please to take more or less stock, once you are happy with your selected click 'Take Stock'.

Search Results:

Take Stock    Clear Selection    Total Qty Selected: 2

| PO Product ID | MEAS | LOCATION | FREE QTY | UNIT QTY TO ASSIGN             | STOCK ISSUES | PRODUCT STATUS | EXPIRY DATE | Batch Number | PREVENT CHANGES          |
|---------------|------|----------|----------|--------------------------------|--------------|----------------|-------------|--------------|--------------------------|
| 3202          | Keg  | BT03B2   | 9        | <input type="text" value="0"/> |              | OK             | 2046-11-09  | 1616         | <input type="checkbox"/> |
| 3203          | Keg  | BT03B2   | 9        | <input type="text" value="0"/> |              | OK             | 2046-11-09  | 1616         | <input type="checkbox"/> |
| 3204          | Keg  | BT03D2   | 9        | <input type="text" value="0"/> |              | OK             | 2046-08-09  | 1542         | <input type="checkbox"/> |
| 3211          | Keg  | BT06A1   | 9        | <input type="text" value="2"/> |              | OK             | 2046-08-06  | 1542         | <input type="checkbox"/> |

We can now see that the product has been added to the Sale Order. If you need to modify the quantity, or remove the product entirely, just click the Delete Button and then Add the Product again. You can add more stock by repeating the process.





## Approving the Sale Order

While working on a Sale Order, it is in a 'Draft' state, and is not yet available for Warehouse Staff to begin picking and packing.

When you have finished adding products to the Sale Order, you need to Approve it so that it will be packed out.

To do this, simply click the Approve button on the Details tab, please note that after the Sale Order has been approved you'll no longer be able to make changes to it.

Please leave "Create Consignment Now" ticked.

Sale Orders >> Sale Order 10080

**i Details** Products \$ Charges Consignments Errors History

Customer reference: TEST-SO

Sale Order Id: 10080

Order urgent: Not urgent  
[Make it urgent](#)

Delivery Address: Iga Belrose , ,25 Ralston Av, Via Pringle Ave BELROSE ,Sydney/metro 2085

Status: Awaiting Pick and Pack (**DRAFT**)

Customer Invoice Status: Awaiting Invoice  
Invoice number: Not available

Value (EX GST): \$0.00

Cash On Delivery: No

Download Original Sale Order File

Actions: [Edit](#) [Approve](#) [Delete](#) [Duplicate](#)

### Approve Sale Order

WARNING: Once you approve a Sale Order, you can't modify it anymore.

### Are you sure?

It is possible for you to create the **Consignment** for this **Sale Order** now if you wish.

Create Consignment Now

Close

[Approve](#)



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## If you need to make Changes after Approving the Sale Order

Call your Warehouse Provider and let them know. Depending on whether the order has already been packed or not we may be able to make changes, the earlier you call, the more likely we are able to make the changes you need.

## Uploading an Invoice

If you want your order(s) to be sent with an Invoice attached to the stock, you'll need to attach this file to the Consignment.

View Sale Order

Sale Orders >> Sale Order 65

Details Products Customer Invoices Charges **Consignments** Errors History

Details

Reference: Testa

Status: Awaiting Pick and Pack

Order Urgent: Not urgent  
[Make it urgent](#)

Delivery Address: The Lounge Room Bar & Bistro, 174 Main St, MORNINGTON,

Invoice Status: Awaiting Invoice  
Invoice number: Not available

Click "Consignments" then click "View" on the right.

View Sale Order

Sale Orders >> Sale Order 65

Details Products Customer Invoices Charges Consignments Errors History

Consignments:

| ID | Value | Quantity | Pallets | Spaces | Cubic | Weight | Delivery Status             | Invoice | Actions              |
|----|-------|----------|---------|--------|-------|--------|-----------------------------|---------|----------------------|
| 61 | 0.00  | 2        | 0       | 0      | 0.044 | 22     | Awaiting Sale Order Packing |         | <a href="#">View</a> |

Peter Sadler Transport Pty Ltd  
ABN: 47 005 653 387



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Click "Customer Invoices"

## View Consignment

Consignments >> Consignment 61

**i Details** **Customer Invoices** Consignment Items \$ Charges ▲ Errors ○ History

Print Labels Print Connote

| Basics          |       |
|-----------------|-------|
| Reference:      | Testa |
| Consignment Id: | 61    |
| Service:        |       |
| Manifest:       | None  |

Click "Add Invoice"

Consignments >> Consignment 61

**i Details** **Customer Invoices** Consignn

### Customer Invoices

+ Add Invoice

Download

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Choose the file and click "Upload"

## Add Customer Invoice

[Consignment Customer Invoices](#) >> Add Customer Invoice

Customer Invoice File

Choose file | No file chosen

File Type

Invoice

Linked To

Consignment

Assign to Consignment

Tribe Brands Pty Ltd::Testa

Upload

Note: Orders which have been marked as "Send Invoice with Goods" may be held at the Warehouse until an Invoice is uploaded into the CartonCloud system. Please ensure each night that you have uploaded all invoices required to avoid delays!

## Making an order Urgent

If you sent through a Sale Order after 1pm and want to ensure it is packed that day, you'll need to make it urgent. To do this, click the button 'Make it urgent'.

This will ensure the order is packed on the same day (note: additional charges may apply).







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Sale Orders >> Sale Order 10080

| <b>i Details</b>         | <b>Products</b>                                     | <b>\$ Charges</b> | <b>✉ Consignments</b> | <b>⚠ Errors</b> |
|--------------------------|-----------------------------------------------------|-------------------|-----------------------|-----------------|
| Customer reference:      | TEST-SO                                             |                   |                       |                 |
| Sale Order Id:           | 10080                                               |                   |                       |                 |
| Order urgent:            | Not urgent                                          |                   |                       |                 |
|                          | <b>Make it urgent</b>                               |                   |                       |                 |
| Delivery Address:        | Iga Belrose , ,25 Ralston Av, Via Pringle Ave ,BELF |                   |                       |                 |
| Status:                  | Awaiting Pick and Pack                              |                   |                       |                 |
| Customer Invoice Status: | Awaiting Invoice                                    |                   |                       |                 |
|                          | Invoice number: Not available                       |                   |                       |                 |

