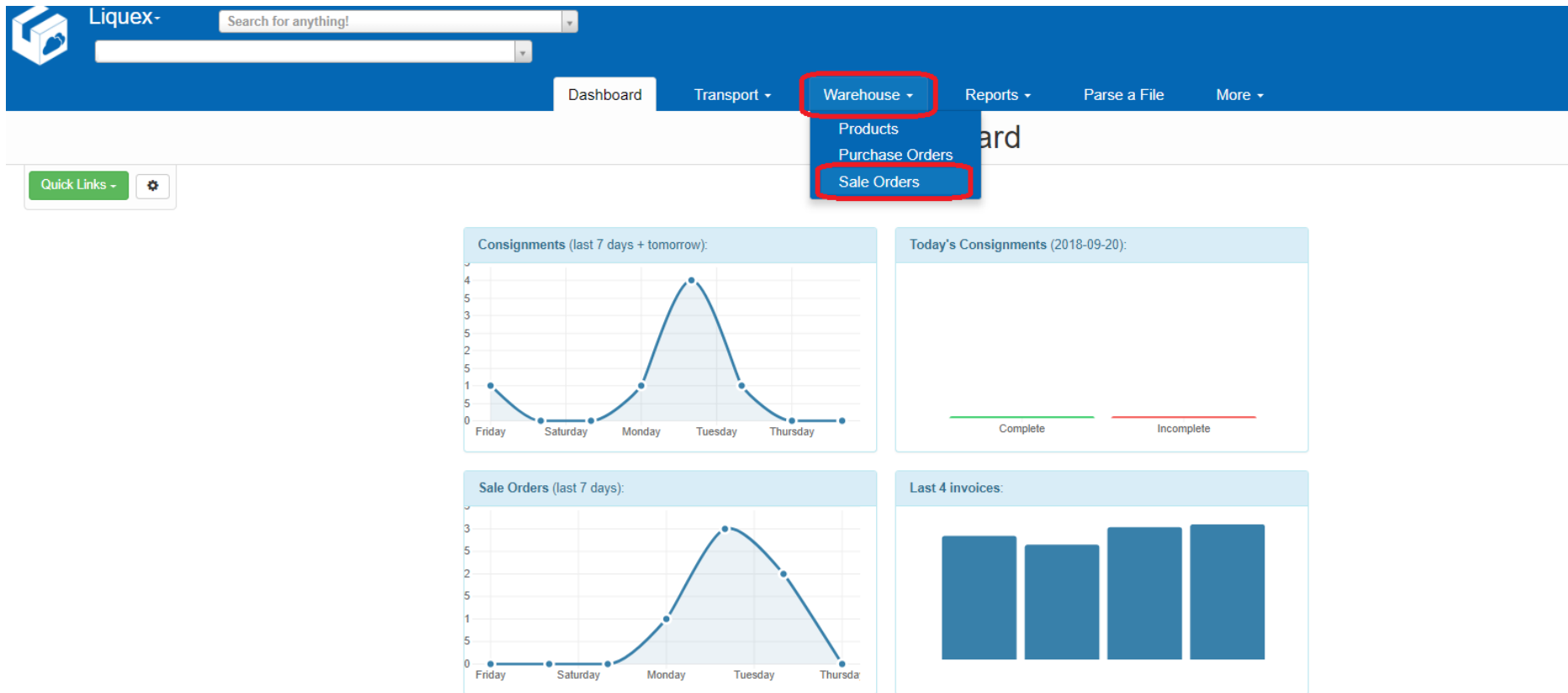


# Entering Sales Orders for Customer / Sales Rep Collections from Liquex Warehouse

Log into the Carton Cloud system using your email address and password: <https://app.cartoncloud.com.au/>

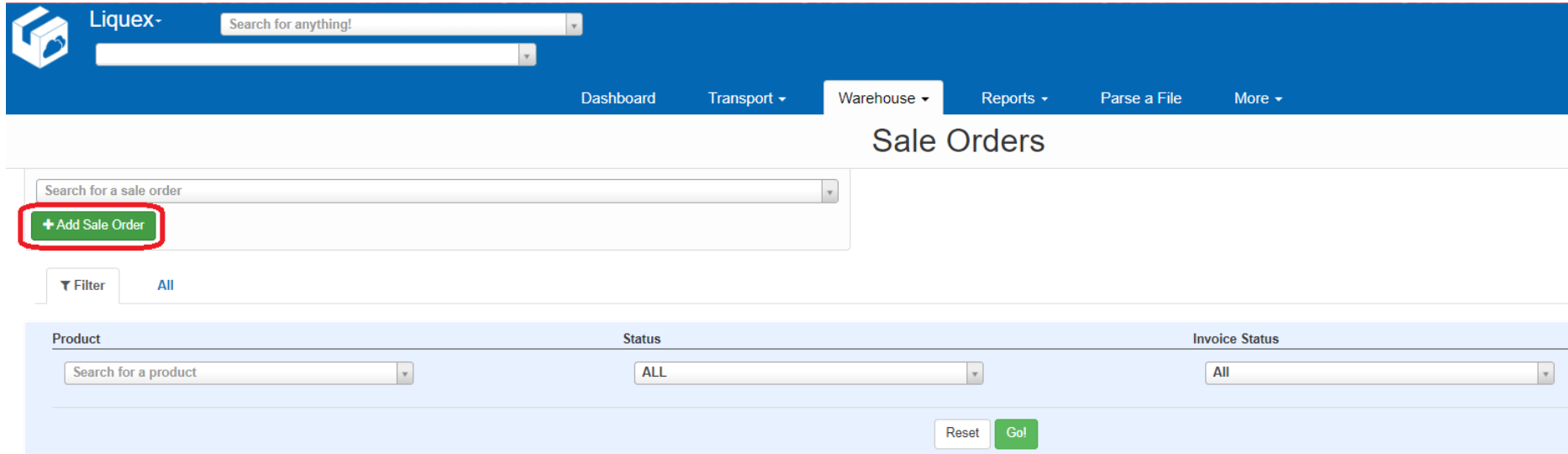
- Once logged in under **Warehouse** select **Sales Orders**



The screenshot shows the Carton Cloud system dashboard. The top navigation bar includes 'Dashboard', 'Transport', 'Warehouse', 'Reports', 'Parse a File', and 'More'. The 'Warehouse' menu is expanded, showing 'Products', 'Purchase Orders', and 'Sales Orders'. Below the navigation bar, there are four data visualization panels:

- Consignments (last 7 days + tomorrow):** A line chart showing consignments over a 7-day period. The y-axis ranges from 0 to 5. The x-axis shows Friday, Saturday, Monday, Tuesday, and Thursday. The data points are approximately: Friday (1), Saturday (0), Monday (1), Tuesday (4), Thursday (0).
- Today's Consignments (2018-09-20):** A progress bar showing the status of consignments for the current day. The bar is divided into 'Complete' (green) and 'Incomplete' (red) sections.
- Sale Orders (last 7 days):** A line chart showing sale orders over a 7-day period. The y-axis ranges from 0 to 5. The x-axis shows Friday, Saturday, Monday, Tuesday, and Thursday. The data points are approximately: Friday (0), Saturday (0), Monday (1), Tuesday (3), Thursday (0).
- Last 4 invoices:** A bar chart showing the number of invoices for the last four days. The bars represent the number of invoices for each day, with values approximately 4, 3, 4, and 4.

- Click on **+Add Sale Order**



The screenshot shows the Liquex Warehouse interface. At the top, there is a navigation bar with the Liquex logo, a search bar, and menu items: Dashboard, Transport, Warehouse (selected), Reports, Parse a File, and More. Below the navigation bar, the page title is "Sales Orders". A search bar for sales orders is present, with a green "+ Add Sale Order" button highlighted by a red box. Below the search bar, there is a "Filter" section with a dropdown menu set to "All". The main content area contains three filter sections: "Product" (with a search bar), "Status" (with a dropdown menu set to "ALL"), and "Invoice Status" (with a dropdown menu set to "All"). At the bottom right of the filter section, there are "Reset" and "Go!" buttons.

Fill out the requested information:

- **Reference** – Enter the **Invoice Number** relating to the order OR **Todays Date**
- **Delivery Address** – Type in the venue name OR type “**PICKUP**” and the Liquex address will appear
- If the address does not appear, click on **+Add new Delivery Address**
- Tick box saying **Order will be picked up from Warehouse**

## Add New Sale Order

[Sale Orders](#) >> Add New Sale Order

### Reference

30/11/2018-PICKUP

### Delivery Address:

PICKUP C/- Liquex, , 45-49 Vella Drive, SUNSHINE WEST, , Victoria, Australia

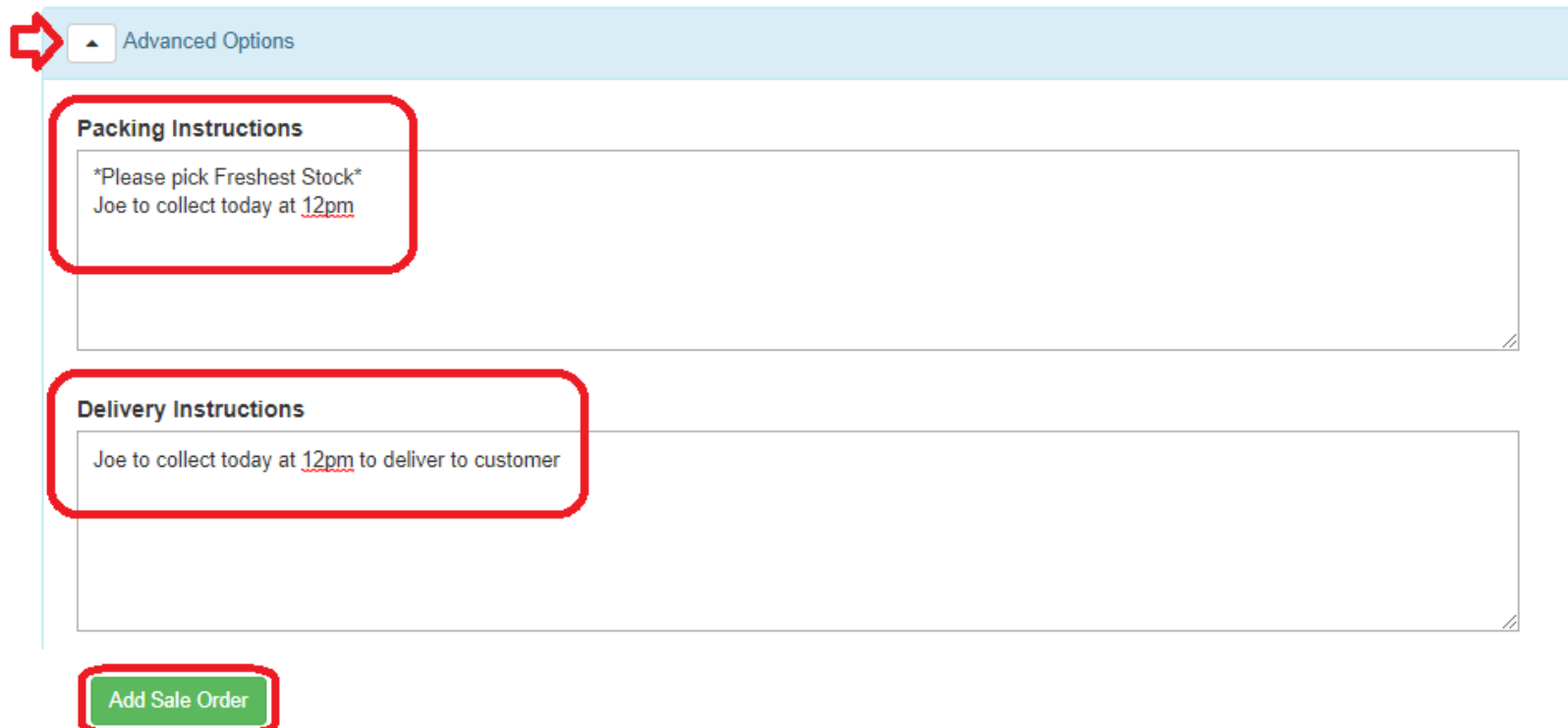
**Order will be picked up from Warehouse:**

Address Not Listed? [+ Add New Delivery Address](#)

Advanced Options

Add Sale Order

- Click on **Advanced Options**
- **Packing Instructions** – This is information that needs to be noted to the warehouse staff.  
EG – Pick Freshest Stock, Joe to collect today at 12pm
- **Delivery Instructions** – This is information that needs to be noted to the office / persons collecting.  
EG – Joe to collect today at 12pm to deliver to customer
- Click on **+Add Sale Order**



Advanced Options

**Packing Instructions**

\*Please pick Freshest Stock\*  
Joe to collect today at 12pm

**Delivery Instructions**

Joe to collect today at 12pm to deliver to customer

Add Sale Order

- The information will appear – if the information is incorrect, select **Edit** to change the details.
- If the order is correct, click on **+Add Products to Sale Order**

## View Sale Order

Sale Orders >> Sale Order 18124

**i** Details

Products

**f** Customer Invoices

\$ Charges

**e** Consignments

**!** Errors

**o** History

### Details

Reference:	30/11/2018-PICKUP
Status:	<b>Draft</b>
Order Urgent:	Not urgent
Packing Instructions:	*Please pick Freshest Stock* Joe to collect today at 12pm
Delivery Address:	PICKUP C/- Liquex, , 45-49 Vella Drive, SUNSHINE WEST,
Delivery Instructions:	Joe to collect today at 12pm to deliver to customer
Invoice Status:	Awaiting Invoice
	Invoice number: Not available

### Next Step

**+ Add Products to Sale Order**

**v** Specifics



**e** Edit

**🗑** Delete

**📄** Duplicate Sale Order

- Type in the **QTY** required
- Type in the code or description of the **Product** and it will search all your products in the system
- Click **Search**

## Add Product to Sale Order - Search Product Stocks

Sale Orders >> Sale Order 18124 >> Search Product Stocks

Search By Product    Search By Other Fields

QTY:     PRODUCT:     MEASURE:

Search Results:

MEAS	FREE QTY	UNIT QTY TO ASSIGN	STOCK STATUS	EXPIRY DATE	Batch Date
Keg	1	<input type="text" value="1"/>	In Warehouse	2018-12-01	14-09-18
Keg	36	<input type="text" value="2"/>	In Warehouse	2019-06-15	
Keg	180	<input type="text" value="0"/>	In Warehouse	2019-06-22	
Total		3			

- A summary of stock will appear at the bottom of the screen
- Click on **Take Stock** to proceed

The system will automatically allocate stock by FEFO (First Expiry, First Out)

Stock can be re-allocated if you want a specific BBD to be used, but you must make a note of this in the **Packing Instructions**

- To add additional items to the order, click on **+Add Product** and repeat the process.

## View Sale Order

Sale Orders >> Sale Order 18124

[i Details](#) | 
 [Products](#) | 
 [Customer Invoices](#) | 
 [\\$ Charges](#) | 
 [Consignments](#) | 
 [Errors](#) | 
 [History](#)

Sale Order Products:

+ Add Product

CODE	Product Name	Quantity	Measure	Expiry Date	Batch Date	Product status	Actions
test50k	Test 50 L Keg	3	Keg				<a href="#">Delete</a>
		1	Keg	2018-12-01	14-09-18	In warehouse	
		2	Keg	2019-06-15		In warehouse	

Once you have added in all the products:



- Click back to the **Details** tab
- Click on **Approve for Packing**

## View Sale Order

Sale Orders >> Sale Order 18124

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


Details	
Reference:	30/11/2018-PICKUP
Status:	<b>Draft</b>
Order Urgent:	Not urgent
Packing Instructions:	*Please pick Freshest Stock* Joe to collect today at 12pm
Delivery Address:	PICKUP C/- Liquex, , 45-49 Vella Drive, SUNSHINE WEST,
Delivery Instructions:	Joe to collect today at 12pm to deliver to customer
Invoice Status:	Awaiting Invoice
	Invoice number: Not available

Next Step

[+ Add Products to Sale Order](#)

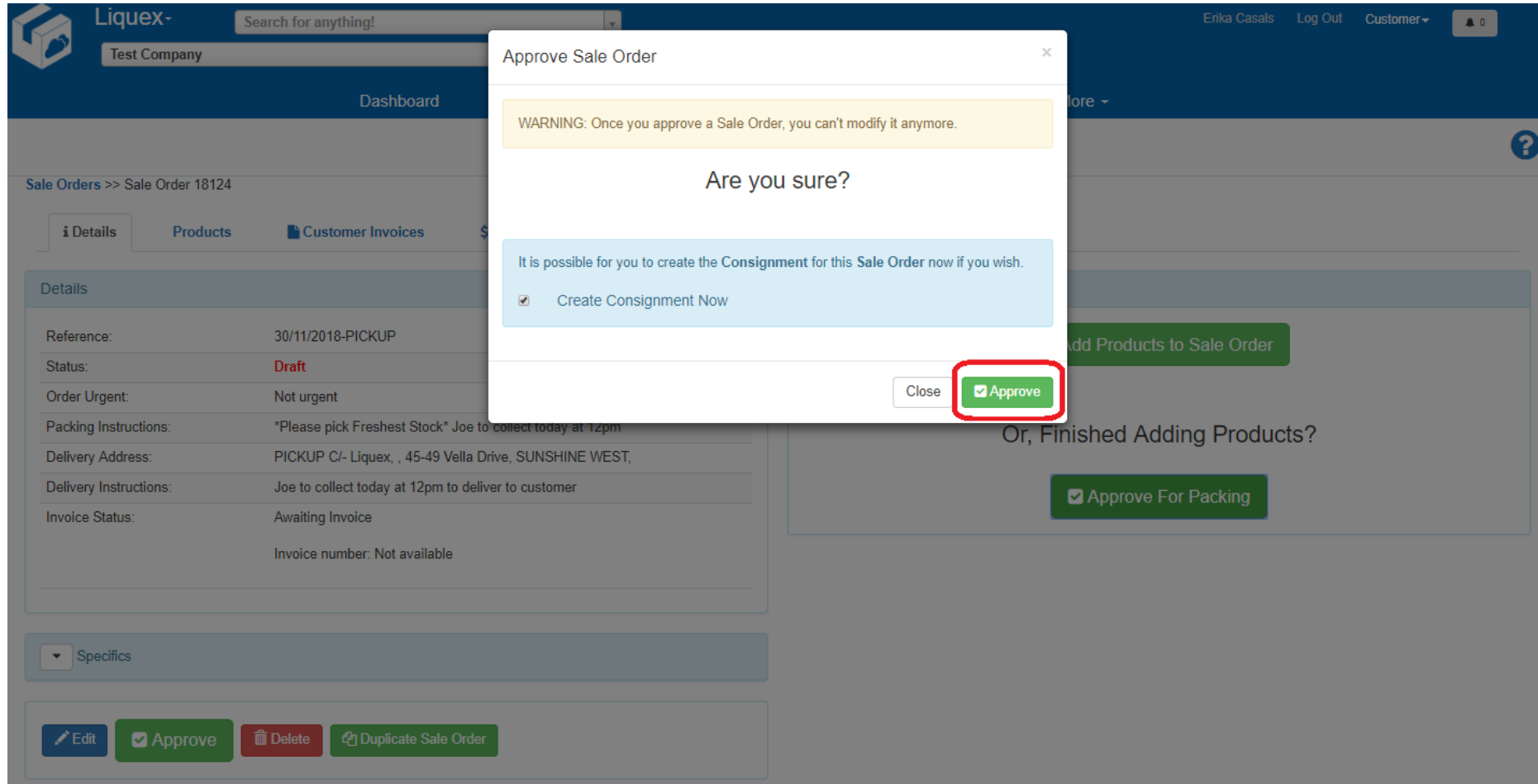
Or, Finished Adding Products?

[✔ Approve For Packing](#)

 Specifics

[Edit](#)   [✔ Approve](#)   [Delete](#)   [Duplicate Sale Order](#)

A confirmation window will appear, click **Approve**



The screenshot displays the Liquex web application interface. A modal dialog titled "Approve Sale Order" is centered on the screen. The dialog contains a yellow warning box at the top: "WARNING: Once you approve a Sale Order, you can't modify it anymore." Below this, the text "Are you sure?" is displayed. A light blue box contains the text "It is possible for you to create the Consignment for this Sale Order now if you wish." with a checked checkbox and the label "Create Consignment Now". At the bottom of the dialog, there are two buttons: "Close" and "Approve". The "Approve" button is highlighted with a red rectangular border. The background shows the application's dashboard with a search bar, user profile, and a "Sale Order 18124" details view. The status of the sale order is "Draft".

If the order requires urgent attention please click, click **Make it Urgent**  
\*Note Same Day Pick charges apply

## View Sale Order



Sale Orders >> Sale Order 18124

Details

Products

Customer Invoices


Charges

Consignments

Errors

History

### Details

Reference:	30/11/2018-PICKUP
Status:	Awaiting Pick and Pack
Order Urgent:	Not urgent
	 <a href="#">Make it urgent</a>
Packing Instructions:	*Please pick Freshest Stock* Joe to collect today at 12pm
Delivery Address:	PICKUP C/- Liquex, , 45-49 Vella Drive, SUNSHINE WEST,
Delivery Instructions:	Joe to collect today at 12pm to deliver to customer
Invoice Status:	Awaiting Invoice
	Invoice number: Not available

### Next Step

[Upload Invoice](#)

Specifics

[Revert to Draft](#)

[Duplicate Sale Order](#)

**Urgent** orders are for same day collections –  
DO NOT use the Urgent function for normal next day pickup or delivery orders.



We will receive an alert and you will receive a response to your urgent request.

If you want your goods to have a copy of your invoice, upload it to the order by clicking on the **Upload Invoice** button. If not, we will use our paperwork.

## View Sale Order

Success! The SaleOrder 30/11/2018-PICKUP urgent request has been sent.

Sale Orders >> Sale Order 18124

Details

Products

Customer Invoices

Charges

Consignments

Errors

History

### Details

Reference:	30/11/2018-PICKUP
Status:	Awaiting Pick and Pack
Order Urgent:	Urgency Requested - Awaiting Approval
Packing Instructions:	*Please pick Freshest Stock* Joe to collect today at 12pm
Delivery Address:	PICKUP C/- LiqueX, , 45-49 Vella Drive, SUNSHINE WEST,
Delivery Instructions:	Joe to collect today at 12pm to deliver to customer
Invoice Status:	Awaiting Invoice
	Invoice number: Not available

### Next Step

Upload Invoice

Specifics

Revert to Draft

Duplicate Sale Order

Follow the prompts  
Click **Choose File** and find the file you want to upload and click **Upload**

## Upload Invoice to Sale Order

[Sale Orders](#) >> [SaleOrder 18124](#) >> Upload Invoice

Choose an Invoice file to Upload

Invoice Number

30/11/2018-PICKUP

Invoice Amount (Ex Gst)

Cash On Delivery

No ▾

File

**Choose File** No file chosen

**Upload**

We will receive an email notifying us of your order, and you will receive a confirmation email once your order is ready for despatch.

- Once you Approve and submit an order it is considered final.
- Should you need to amend the order for any reason please send an email with the **Sales Order Number** and instructions to [despatch@liquex.com.au](mailto:despatch@liquex.com.au)
- For assistance with Carton Cloud or orders please email [support@liquex.com.au](mailto:support@liquex.com.au)