Wholesale Customers

04/30/2025 3:10 pm CDT

Overview

A **Wholesale Customer** is a customer who purchases products in significant quantities, often benefiting from discounted prices due to the large order size. Such buyers frequently repeat their bulk purchases. Sellercloud allows you to configure default profiles for your Wholesale Customers to avoid repetitive manual order modifications. These profiles can include information such as contact details, shipping addresses, payment terms, and specific pricing agreements.

This article will guide you through the step-by-step process of configuring your Wholesale Customer profiles and their pricing, along with related Wholesale settings. Additionally, you will find information on how to filter and identify your **Repeat Customers**.

Configure Wholesale Customers

Sellercloud lets you manage your Wholesale Customers according to your needs. You can create customers individually or in bulk, edit their account information, export data, and delete customer accounts that are no longer needed.

Create Wholesale Customers

Once added, the buyer will be automatically identified as a **Wholesale Customer** and their future orders marked as **Wholesale**.

Individually

To create Wholesale Customers individually:

1. Go to **Customers** > Select **Manage Customers** > Click the **+** icon to create a new customer.

2. In the **Create New Customer** window, select **Wholesale** and fill in the required customer information.

    a. **Company**

   b. **First Name**

    c. **Email address**

    d. **Business Name**

3. Click **Save**.

In Bulk

To create Wholesale Customers in bulk:

1. Go to **Customers** > Select **Tools** > **Import Customers**.

2. Select **File Type** (CSV, Excel Tab Delimited) and download the template to your computer.

3. Populate the fields:

   - Fill in the customer's **BusinessName**.

   - Fill in the customer's email and the **CompanyID** where the customer should be created.

   - Enter **1** or **True** into the **IsWholeSale** column to mark a customer as wholesale.

   - Enter **True** into the **TaxExempt** column to mark a customer as tax-exempt. Enter **False** to mark them as not tax-exempt.

   - Enter the appropriate group name into the column **UserGroupName** to add a customer to a Customer Group.

   - Enter **True** into the **AllowShippingUnPaidOrders** column to allow unpaid orders to be shipped for that customer. Learn more here.

4. Save the file and go back to Sellercloud to upload it.

5. *(Optional)* Enable the checkbox **Plugin Doesn't Require Input File** in cases where you are using a plugin to import the information directly from an external URL or 3rd party software.

6. Click **Import**.
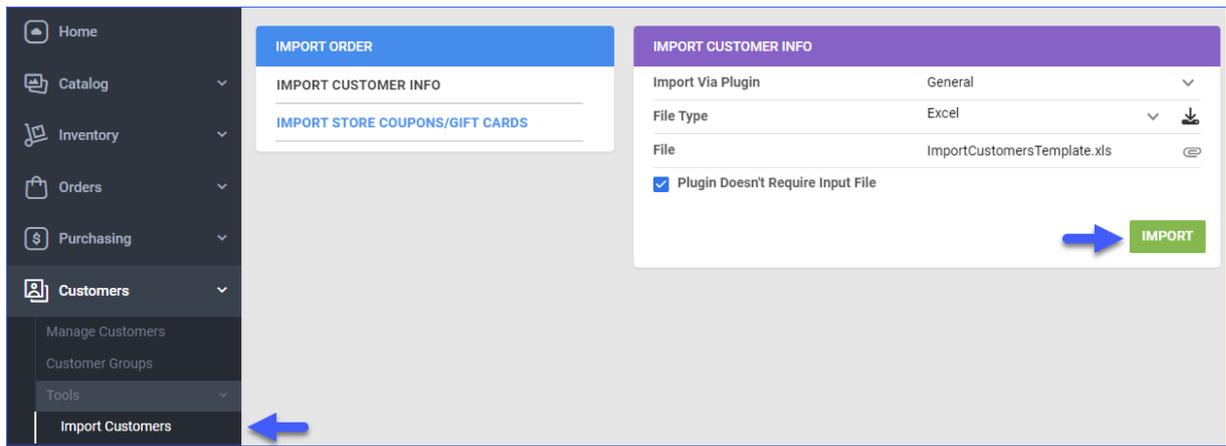
7. A Queued Job will be generated. Click the link in the notification at the bottom of the page for details.

The same process can also be used to update existing customers.

Edit Wholesale Customers

Once you create a Wholesale Customer, you can edit their properties as needed.

To edit a Wholesale Customer's profile:

1. Go to **Customers** > Select **Manage Customers** > Open a Wholesale Customer.

2. Click on the **Edit** button in the upper right corner.

3. Apply your changes and click **Save**.
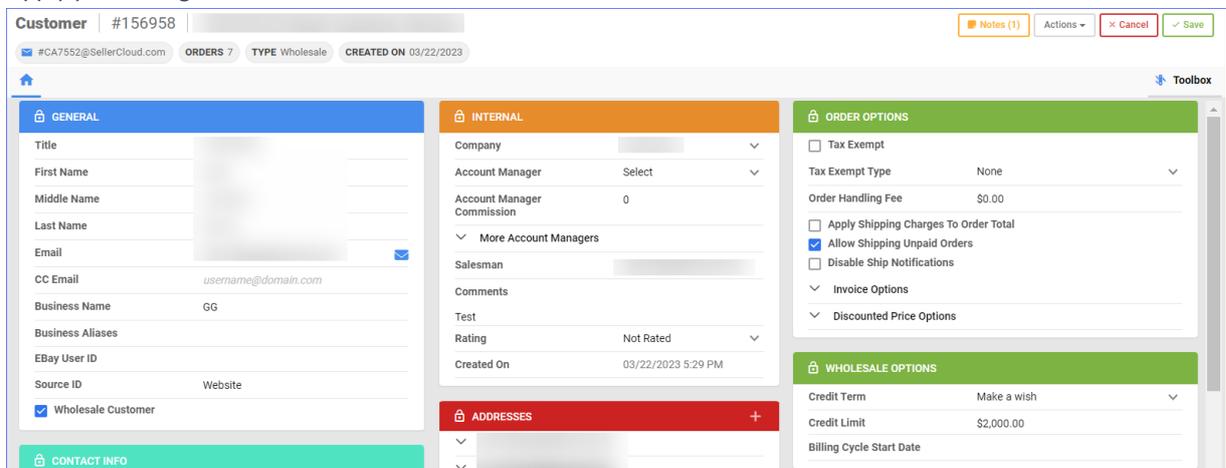
To remove data associated with a **Wholesale Customer** as part of the right to be forgotten or for any other reason, use the **Purge Customer Information** action. This action is final and irreversible, leading to a permanent disassociation of the **Wholesale Customers** from their related orders.
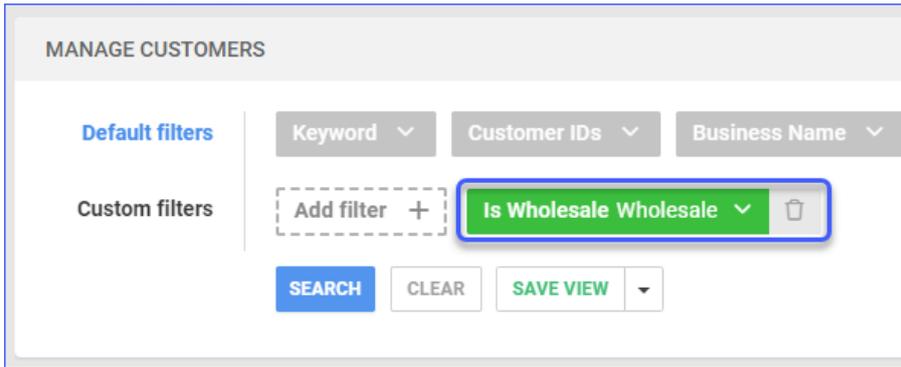
Delete Wholesale Customers

If you no longer need a customer's profile, you can easily delete it.

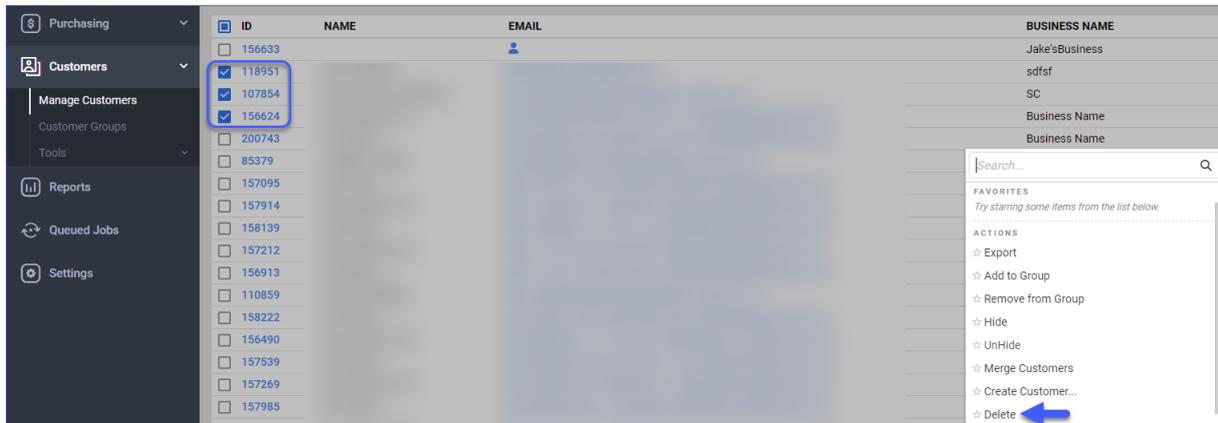To delete a Wholesale Customer's profile:

1. Go to **Customers** > Select **Manage Customers**.

2. Click on **Add Filter** and select **Is Wholesale** – **Wholesale** from the dropdown menu. This way you will filter the

search to display only your **Wholesale Customers**.

3. Select one or more **Wholesale Customers** > Click on the **Action Menu** > **Delete**.

Deleting a Customer's Profile is an irreversible action and will delete the account permanently.

Action Menu

You can explore various actions available for your Wholesale Customers.

1. Go to **Customers** > Select **Manage Customers**.

2. Click on **Add Filter** and select **Is Wholesale** – **Wholesale** from the dropdown menu.

3. Select one or more Wholesale Customer(s) and click on the Action Menu:

   a. **Export** – This will export your selected customers' information in the desired format (**CSV/TAB Delimited/Excel**). You can use the exported file to update customer information as needed. To remove all old addresses of an existing customer, enter **DeleteAddresses** into the **Action** column. If there are new addresses in the input file, those addresses will be saved.

4. **Add to Group** – A pop-up window will appear to add your customers to an existing Customer Group or create a new one to include them in.

5. **Hide** – Hide customer profiles.

6. **Unhide** – You can filter your search to show hidden customers (**Include Hidden Customers** – **Yes**) and this action will undo the above-mentioned.

7. **Merge Customers** – Merge multiple customer profiles into one.
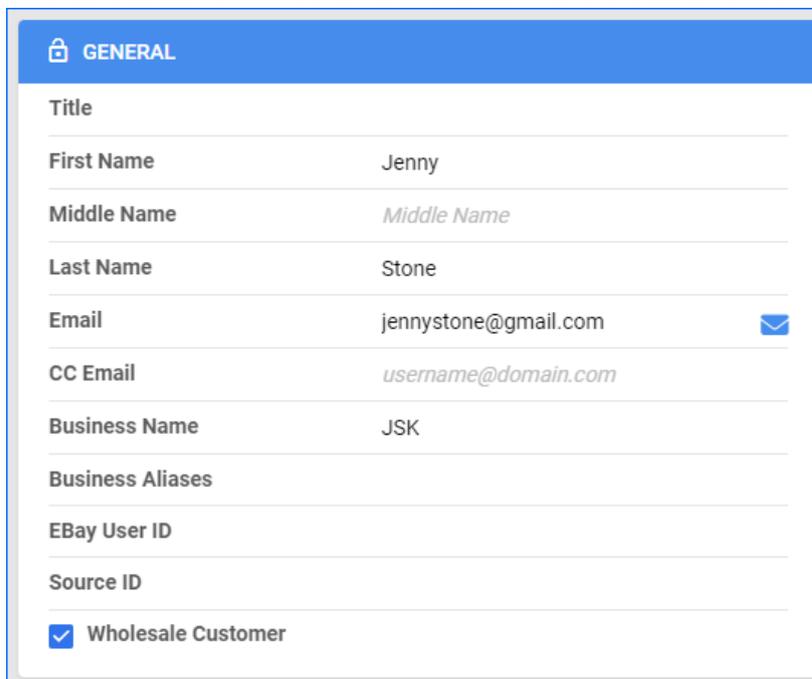
8. **Delete** – Delete customer profiles.

Wholesale Customers Settings

You can configure a variety of Wholesale Customer properties.

General Settings

The following general settings are available:
- **Title** – Customer's Title.
- **First Name** – Required field for Wholesale Customers.
- **Middle Name** – Customer's Middle Name.
- **Last Name** – Customer's Last Name.
- **Email** – Required field for Wholesale Customers.
- **CC Email** – Enter an email that will receive a copy of the message sent to the original email mentioned above.
- **Business Name** – Required field for Wholesale Customers
- **Business Aliases** – Alternative names used for different purposes like branding or legal registration.
- **eBay User ID** – Enter your customer eBay User ID if applicable.
- **Source ID** – Wholesale customer data Source ID, if applicable.
- **Wholesale Customer** – This checkbox indicates whether the customer is a Wholesale Customer or not.

Internal Settings

The following settings display Sellercloud internal information about the customer's account managers, salesmen, creation date, and more.
- **Company** – Select the Company under which the client is created.
- **Account Manager** – Customer's account representative.
- **Account Manager Commission** – Account manager commission's percentage.
- **Salesman** – Salesman email address.
- **Comments** – Any related comments.
- **Rating** – Select the customer's rating from the dropdown

- **Created On** – Account creation date.

Order Settings

You can customize various Wholesale Orders settings for each of your **Wholesale Customers**, such as:

- Tax Exempt – You can mark Wholesale orders as tax-exempt to prevent applying unnecessary taxes. Identify exempt **Tax ID**, **Tax Exempt Type** and **Manage Exempt States**, to additionally specify the default taxes, applicable to the **Wholesale Customer**'s orders.
- **Order Handling Fee** – Define the default order processing charge applied to every order from this **Wholesale Customer**.
- Apply Shipping Charges To Order Total – To add incurred shipping charges to the order total.
  To apply incurred shipping charges to all wholesale orders on a global level, activate the Client Setting **Enable Apply Shipping Charges To Order Total**.
- Allow Shipping Unpaid Orders – You can permit the shipping of orders without immediate payment for specific customers, as payments are typically settled periodically. This setting will only work in combination with:
  - **Client Setting – Allow Shipping Unpaid Orders**.
  - **Company Setting – Allow shipping regardless of payment status**.
  - For each **Order** select **Action** – **Allow Shipping Even Not Paid**.
  - Shipbridge users must also have **Admin Setting** – **Allow shipping regardless of payment status** enabled. Contact Sellercloud Support for assistance.
- **Disable Ship Notification** – Enable this setting to prevent Sellercloud from sending shipping notifications to the customer.
- **Invoice Options** – Configure a Wholesale Invoice, to determine the default invoice settings for wholesale orders.

To allow shipping of only selected unpaid orders instead, open a Wholesale Order and use the action **Allow Shipping Even Not Paid** for each order you want to ship. Learn more about that here.

Wholesale Options

You can outline custom Payment Terms for each Wholesale Customer:

- Credit Terms – Select a default timeframe from the dropdown menu, within which the customer must process the payment.
- Credit Limit – Configure the maximum amount of credit per payment term.
- Billing Cycle Start Date – Select a billing cycle start date for the Credit Term.

Shipping Preferences

Navigate to the customer's **Shipping Preferences** page, to determine settings, such as **Shipping Carrier**, **Method,** and **Shipping Charges**, to apply to Wholesale Customer's orders.

Add and **Enable** a Customer's shipping **Account #** to apply the order's shipping charges directly to the customer's account. Learn how to Set Up Wholesale Customer Third-Party Billing, to correctly enter default **Wholesale Customer** 3rd party billing and shipping details.

Selecting a shipping carrier and method will assign it to orders under that customer and will lock it on orders.

Wholesale Customers Pricing

Wholesale Pricing can be set uniquely per product for each **Wholesale Customer**, or globally for all products based on a percentage of the Product's Cost, commonly referred to as **Wholesale Price Based Discount**.

Assign Unique Wholesale Price to SKU

Client Setting **Enable Per Customer Wholesale Pricing** must be enabled for this workflow. To enable the setting, navigate to **Settings** > **Client Settings** > **General Client Settings**.

To assign prices per SKU:

1. Go to **Customers** > **Manage Customers** > Select a **Wholesale Customer**.

2. In the Toolbox, select **Wholesale Prices** > **Edit**.

3. Click the **+** icon to add a new wholesale price.

4. A pop-up window will appear. Enter the **SKU** name and the **Wholesale Price** > Click **Add New Wholesale Price**.

CREATE NEW WHOLESALE PRICE   ✕

SKU *	000012312313-Tomato-Single	✕ 🔍
Wholesale Price *	$143.00	
Start Date	04/3/2024 3:57 PM	
End Date	04/3/2024 3:57 PM	
Shipping Carrier	*Shipping Carrier*	
Shipping Method	*Shipping Method*	
Event Name	*Event Name*	

CANCEL   → ADD NEW WHOLESALE PRICE

To upload Wholesale Prices in bulk:

1. Go to **Customers** > **Manage Customers** > Select a **Wholesale Customer**.

2. In the Toolbox, select **Wholesale Prices** > **Edit**.

3. Click the **Upload New Wholesale Prices Template** button.

SKU	PRICE	START DATE	END DATE	SHIPPING CARRIER	SHIPPING METHOD	EVENT NAME	LAST UPDATED
001234	$8.00	07/31/2023 1:09 PM	07/31/2023 1:09 PM				07/31/2023 01:11 PM

Displaying results **1-1** of **1**

4. Download the provided template > Enter the **Product ID** and **Wholesale Price** > Save and upload it back into

UPLOAD TEMPLATE   ✕

Sellercloud.

Click or drag file here to upload template

→ DOWNLOAD TEMPLATE ↓

CANCEL   UPLOAD

Autosave Wholesale Prices from Orders

Client Setting **Auto Save WholeSale Prices When Order Is Created** must be enabled for this workflow. To enable the settings, navigate to **Settings** > **Client Settings** > **General Client Settings**.

The price assigned to the product when creating a wholesale order will be saved to the **Wholesale Prices** tab on the customer's profile.

Per-Customer Global Percent Discount

Client Setting **Enable Order Item Level Discounts** must be enabled for this workflow.

You can set **Discounted Price Options** to define a global discount based on the products' Wholesale Price, Site Price, or Cost.

- **Wholesale Price** – This will discount all products for the customer. The discount will be applied to the regular wholesale price set on the product home page.
- **Product's Site Price** – This will discount all products for the customer. The discount will be applied to the site price set on the product home page.
- **Product's Cost** – Customer A will always be charged 15% more than the site cost, while Customer B will always be charged 13% more than the site cost.

To set a discounted price:

1. Open a Wholesale Customer and click **Edit**.

2. In the **Order Options** panel, expand the **Discounted Price Options** dropdown menu.

3. Locate the **Wholesale Price Based Discount** field and enter a percent..

4. Choose your discount type and enter the discount value. For Cost-based Pricing, select the **Cost Type** – Site Cost,

Last Cost, or Average Cost.

Repeat Wholesale Customers

Repeat Customers in Sellercloud stands for customers who have placed more than one order. This focuses on the frequency of the orders rather than their total number or transaction values.

You can easily identify your **Repeat Wholesale Customers**, by using custom search filters:

1. Navigate to **Customers** > **Manage Customers**.

2. Click **Add Filter** and search for **Is Wholesale**. Add the filter and from its dropdown, select **Wholesale**.

3. Click **Add Filter** and search for **Repeat Customers**. Add the filter and from its dropdown, choose **Yes** and click **Search**.

The list of your **Repeat Wholesale Customers** appears on your screen.

Export Repeat Wholesale Customers

To export detailed Wholesale Customer information, such as the **total number of orders** or **orders' total price** use the **Export** action on the Manage Customers page.

1. Go to **Customers** > Click on **Manage Customers**.

2. Select your **Wholesale Customers** from the grid.

3. Click on the **Action Menu** and choose **Export**.
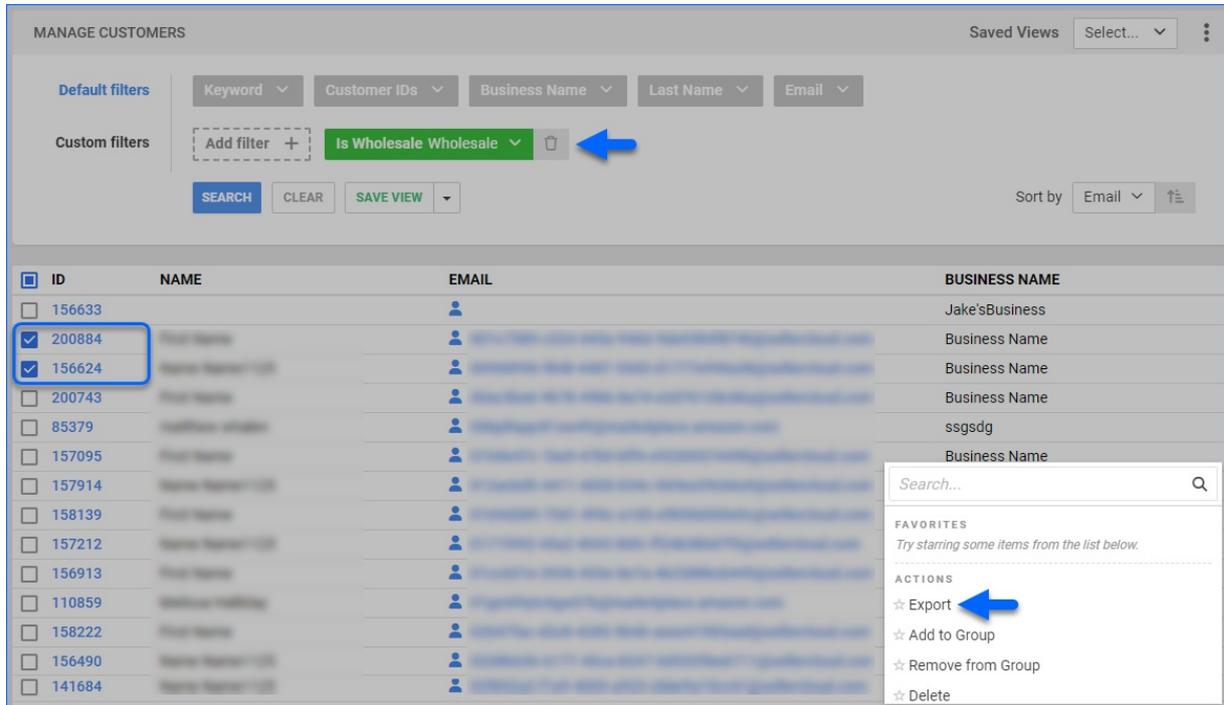
4. A pop-up window will appear to select **Export Type** and **Export Format**.
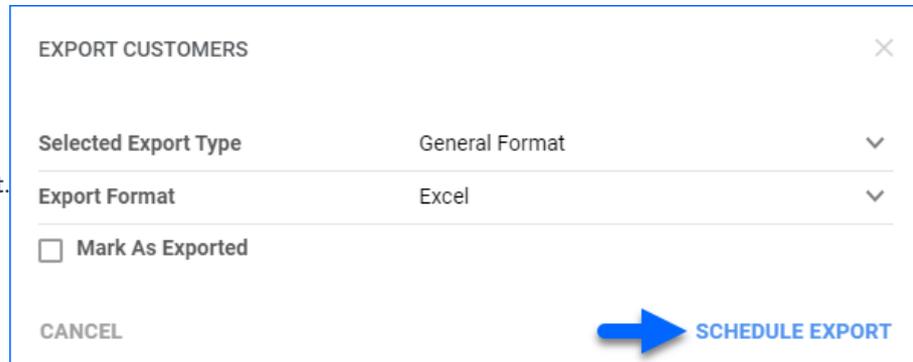
5. Click **Schedule Export.**

6. A Queued Job will be generated. Click the link in the notification at the bottom of the page to download your output file.

Related Client Settings

The following relevant Client Settings are available:
- **Auto Save Wholesale Prices When Order Is Created**
  - When enabled, we will automatically pull and save **SKU** prices under a customer for each Wholesale Order you create or import. You must also turn on **Enable Per Customer Wholesale Pricing** for the setting to work.
- **Default Manual Orders To Wholesale**
  - If this setting is enabled and you manually create a new order, the Channel field and **Is Wholesale Customer checkbox** will automatically be set to **Wholesale** and Enabled respectively.
- **Enable Apply Shipping Charges to Order Total**
  - Enable this setting to automatically apply incurred shipping charges to the total amount of all wholesale

orders on a global level.

- **Enable SitePrice Based Wholesale Discount**
  - Enable to show the **Enable SitePrice-Based Discount checkbox** on the **Wholesale Customer** > **Order Options** panel > **Discounted Price Options**. This will discount all products for the customer. The discount will be applied to the **Site Price**.
- **Enable Wholesale Options In Manage Orders Action Menu**
  - If enabled, four actions called **Set As Quote Order**, **Add to Credit Memo**, **Generate Statement of Accounts** (**PDF**), and **Generate Statement of Accounts** (**Excel**) will appear in the Actions Menu on the Manage Orders page, and **Set As Quote Order**, **Add to Credit Memo** will also appear in the Order Details page actions menu.
- **Import Wholesale Orders Without Any Payment**
  - If enabled and you use the **Import Channel Orders Wholesale** file template on the **Import Order Info via File page**, we will automatically change the payment status from **NoPayment** to **Charged** upon import.
- **Allow To Hide Prices On WholeSale Order Invoice**
  - If enabled, we will hide all price-related information when you use the **Print Invoice to PDF** action from the **Actions Menu** of a Wholesale Order turning it into a packing slip. The **Show Prices** And **$ Total checkboxes** should also be disabled on the **Invoice Company** page for the setting to work.
- **Enable Cost Plus Based Wholesale Prices**
  - If enabled, a checkbox called **Enable Cost-Based Pricing** will appear in the **Order Options** panel on the Customer Details page. If you check the abovementioned box, two new fields called **Cost Type** and **Percent To Add** will appear below it. Enable **Cost-Based Pricing** will not be visible until you expand the **Discounted Price Options dropdown** within the panel.
- **Enable Single Package For Wholesale Orders**
  - If enabled, we will force generate only one package if the value in the **Order Status** field is **Wholesale**.
  - If disabled, we will compare the estimated number of packages to the value provided in **MaxNumberOfPackagesForOrder** and create multiple packages.
- **Stop Calculating Taxes For Wholesale Orders**
  - If enabled, we will not calculate Taxes for Wholesale Orders.
- **Enable Per Customer Wholesale Pricing**
  - Default product prices for wholesale orders can be set either per customer or globally based on a percentage of a product's cost. If this setting is enabled, you will be able to enter default prices for each SKU under a customer.
- **Enable Required Fields For Wholesale Customers**
  - When enabled, this setting will include the required fields for creating Wholesale Customers. Contact Sellercloud Support if you need to change the required fields for creating Wholesale Customers.
- **Consider WholeSale Order As Paid When Calculating P&L**
  - When enabled, Wholesale Orders will be treated as paid upon calculating Order P&L.
- **Allow To Create Over Credit Limit Wholesale Orders**
  - This setting enables you to create orders for customers with overdue payments. To restrict this, disable this client setting.
- **Default Wholesale Warehouse when creating a new order (select warehouse)**
  - When you select a warehouse from the dropdown of this setting, we will automatically apply it as a **Ship From Warehouse** to all orders you create that have the **Is Wholesale Customer checkbox** enabled on the **Create New Order** manual workflow. Note that the warehouse will not display until you add products to the order.
- **Send Order Welcome Email For WholeSale Unpaid Orders**
  - If enabled, we will send **Order Welcome emails** to a customer for unpaid wholesale orders.

Understanding wholesale customers

A wholesale customer is a customer buying items in large quantities, often at discounted prices. It is not uncommon for these types of customers to repeat their bulk purchases. In Sellercloud, you can use default settings for individual customers that ensure that when these orders come in, they won't require any manual adjustments. This means your wholesale customers get what they need when they need it without any heavy lifting on your end.

Wholesale customers can be managed under **Customers** > **Manage Customers**. Locate the customer and configure the following settings:

Mark customer as Wholesale Customer— This setting will automatically mark orders made by wholesale customers as wholesale orders.

Allow Shipping unpaid orders— This will allow orders to be shipped without payment, as wholesale customers pay periodically.

Tax-exempt— This will mark wholesale customers as tax-exempt to prevent applying tax from local orders.

Configure wholesale pricing options— These settings can be adjusted per product, pricing calculations, discounts, or shipping totals.

Configure credit terms and limits— Setting up payment terms for wholesale customers controls the amount of time a wholesaler has to pay, as they pay periodically.

Configure default shipping options— Adjusting default shipping options makes it easy to provide the same shipping service consistently to wholesale customers.

Track Orders— Wholesale orders can be filtered on the **Manage Orders** grid. Orders are also saved on the customer level.

Per Customer Invoice Selection— Invoices can be created for specific customers through an invoice plugin.

Validate Selling Price is greater than _____ of Site Cost – Client setting. Sends warning if Selling Price is set below the given percentage in the setting, compared to Site Cost.

Wholesale Pricing for Specific Customers

Wholesale Pricing can be set uniquely per product for each **Wholesale Customer**, or globally for all products based on a percentage of the Product's Cost, commonly referred to as **Wholesale Price Based Discount**.

Option 1: Assign a unique wholesale sale price to a SKU for a specific wholesale customer

Client Setting **Enable Per Customer Wholesale Pricing** must be enabled for this workflow.

Open the **Customer** tab and locate the customer.

Check the **Wholesale Customer** box.

Refresh the screen.

Click the **Wholesale Price** tab on the side menu.

Download the tab-delimited template and enter the Product ID and Wholesale Price.

Save the file.

Select the file and click **Upload File.**

Option 2: Auto-save wholesale prices from orders

This means that a price assigned to a product when creating a wholesale order will be saved for the wholesale customer on the order. The product and pricing information will be saved to the wholesale prices tab on the customer profile.

Select these two Client Settings:

Enable per customer wholesale pricing

Auto Save WholeSale Prices when order is created

Option 3: Per-customer global percent margin based on the product's cost

This means that Customer A will always be charged 15 percent more than the site cost, while Customer B will always be charged 13 percent more than the site cost.

Select these two Client Settings:

Enable per customer wholesale pricing.

Enable Cost Plus based wholesale prices.

Two fields will appear on the Customers General information page:

Enable Cost Plus based wholesale prices.

Cost Plus Based WholeSale Price.

Cost Plus Based WholeSale Price using _____.

Enable the option and enter a percent value. Select from the dropdown which item cost will be used in the percent calculation – Site Cost, Last Cost, or Average Cost.

Option 4: Per-customer global percent discount based on the product's wholesale price

This will discount all products for this customer. The discount will be applied to the regular wholesale price set on the product home page.

Select the Client Setting **Enable Order Item Level Discounts.**

Locate the Wholesale Price Based Discount field on the customer.

Enter a percent.

Option 5: Per-customer global percent discount based on the product's site price

This will discount all products for this customer. The discount will be applied to the site price set on the product home page.

Select the Client Setting **Enable SitePrice based wholesale discount.** A field will display **SitePrice based Discount.**

Enter a percentage and enable the discount.