Wholesale Orders Workflow

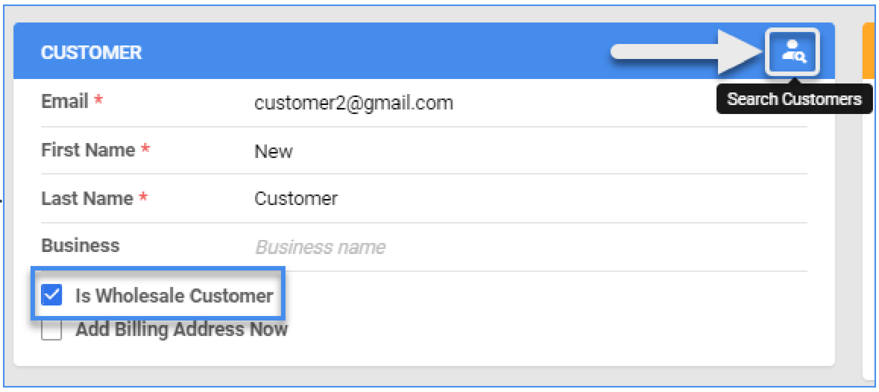
04/30/2025 3:19 pm CDT

Overview

In contrast to retail orders, Sellercloud can ship wholesale orders without payment. Learn how to create wholesale orders, apply a payment to multiple orders, and use the case quantity on them. Learn more about wholesale-related settings in this article.

Create a Wholesale Order

1. Go to **Orders** > **Create New Order**.
2. Check **Wholesale Customer** or click the **Search Customers** button > Select the wholesale customer > Click the blue arrow to proceed.

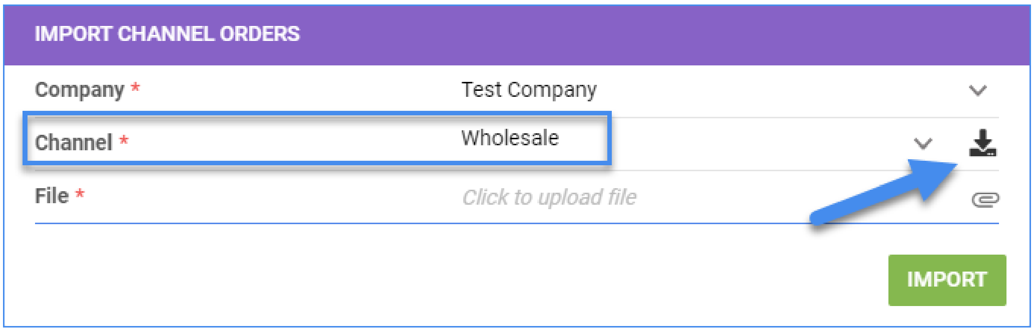


3. Click **Add products**. The wholesale price will be used for the products.
4. Complete the order creation as described in the Create an Order article.

Add Orders in Bulk

To import wholesale orders in bulk:

1. Go to **Orders** > **Tools** > **Import Order Info** panel.
2. Select a company > From the **Channel** dropdown list, select **Wholesale** > Download the template.



3. In the downloaded file, populate the fields and save the file.
4. Return to Sellercloud > **Click to upload file** and attach the saved file > **Import**.

Wholesale Order Payments and Invoices

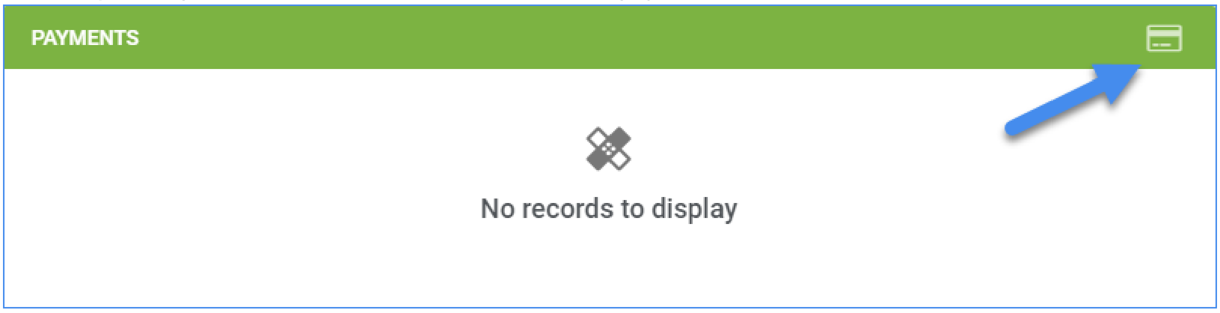
Receive Payment Manually

Wholesale customers are periodically invoiced for orders placed at a given time. Often, the customer will pay by check: either fully, or partially. To receive the payment for the wholesale order:

1. Go to **Orders** > **Manage Orders** > Select an order.

2. On the **Order Details** page, go to **Toolbox** > **Payment.**

3. In the **Payments** panel, click the card button to receive the payment.



4. Select the **Operation Type** > Fill in the mandatory payment info > Click **Receive Payment**.

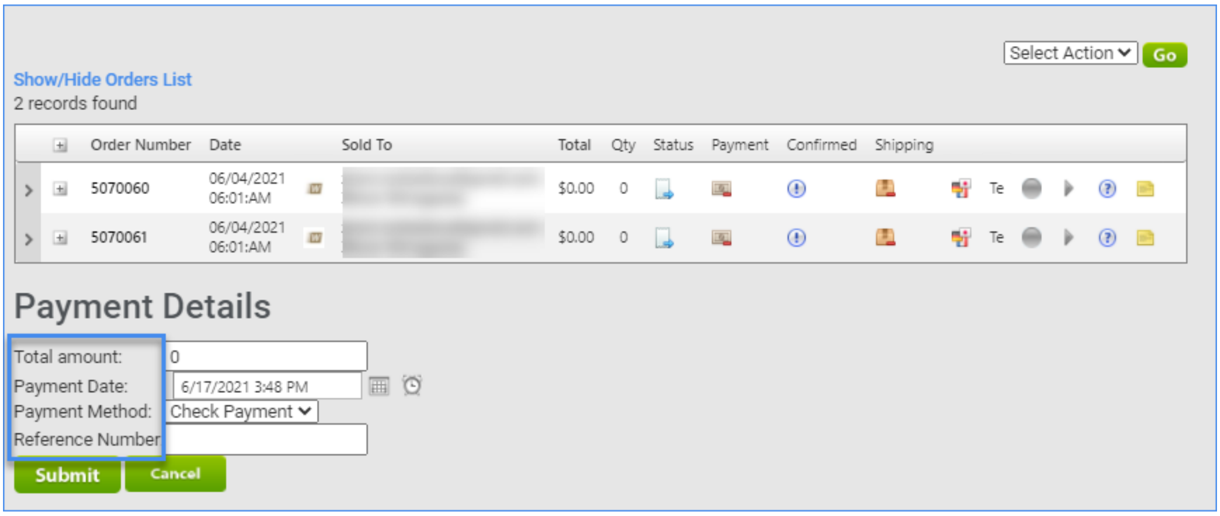
Receive Payment in Bulk

Instead of manually applying the payment to individual orders, you can apply the check payment to multiple orders. The payment will be applied to the oldest order first, with the balance applied to more recent orders in chronological order. Prerequisite: Enable the **Enable partial check payment on Orders in bulk** Client Setting.

1. Go to **Orders** > **Manage Orders** > Select the orders.

2. From the **Action** menu, select **Manage Payments** > **Receive Payment**.

3. Fill in the payment details: Set the **Total Amount** to the amount on the check > Enter a **Reference Number**.

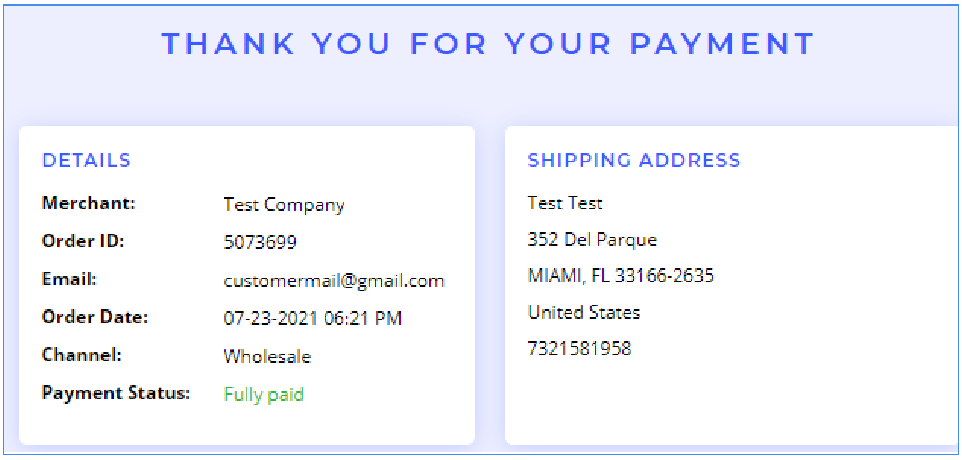


4. Click **Submit**.

Receive Payment via Waytopay.me

You can generate an external payment link for your customers with Waytopay.me:

1. Go to **Orders** > **Manage Orders** > Select an order.
2. On the **Order Details** page, click **Actions** > **Generate WayToPay Payment Link**.
3. Follow the generated link to see the payment status:

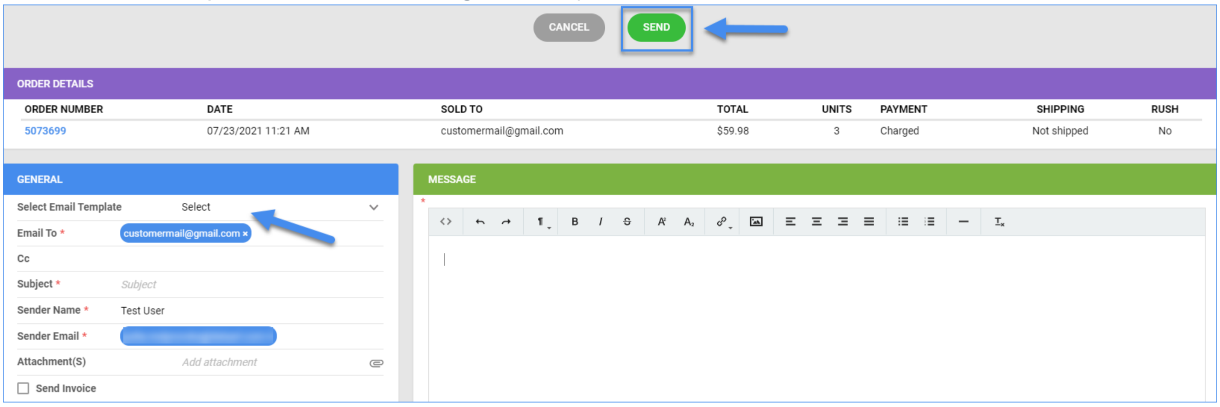


You can allow shipping unpaid orders if you wish to receive payment at a later time but ship the order before that. You can also configure invoices specifically for wholesale orders.

Email Wholesale Orders

You can email the wholesale order to your customer:

1. Go to **Orders** > **Manage Orders** > select an order.
2. On the **Order Details** page, click **Actions** > **Email Customer**.
3. Select an email template or enter the message manually.



4. Click **Send**.

You can send the payment activity and invoice information to the customer in a form of aStatement of Account report.

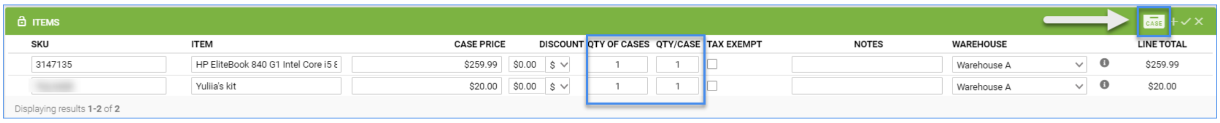
Enable Case Quantity

Purchasing by case implies buying products from a vendor by the case and selling them as individual units. Prerequisite: enable the client setting **Enable Case Qty for Orders**.

1. Go to **Orders** > **Manage Orders** > select a wholesale order.

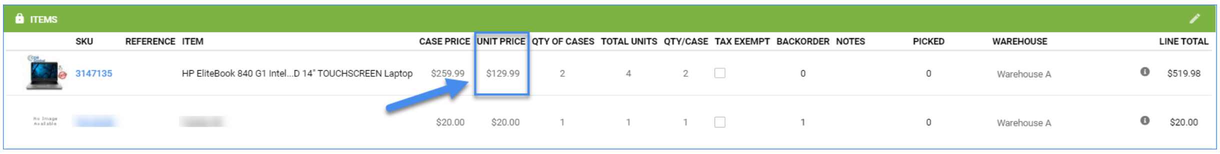
2. On the **Order Detail** page, go to **Items** > click **Edit > Enable Case Qty.**

3. Enter **Qty of Cases** and **Qty/Case.**



4. Click **Save**. Now the items can be added by case qty.

The **Unit Price** is not set on the order manually, it is calculated automatically by the **Case Price/Case Qty.**



When you enable the **Case Qty** mode for a wholesale order, the order total is automatically re-calculated based on the Case Prices.

Generate Statement of Account

You can use this report to see the Invoice and Payment activity of a customer during a specific time period, resulting in an ending balance. It can also be used as an A/R Aging Report to keep track and to remind a customer of sales on credit that have not yet been paid for.

1. Go to **Orders** > **Manage Orders** > select orders.

2. Choose either **Generate Statement of Account (PDF)** to create in PDF format or **Generate Statement of Account (Excel)** to create in Excel format > save the file.

For more information, see the Statement of Account topic.
