

# Wholesale Orders Workflow

04/30/2025 3:19 pm CDT

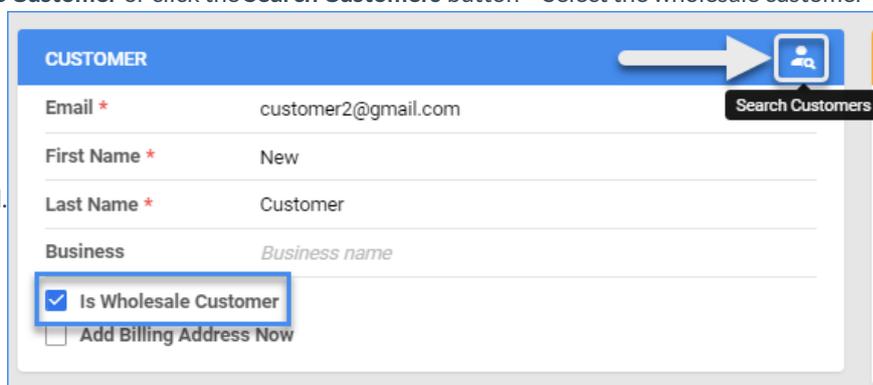
## Overview

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.



The screenshot shows a form titled 'CUSTOMER'. It has the following fields and options:

- Email \***: customer2@gmail.com
- First Name \***: New
- Last Name \***: Customer
- Business**: Business name
- Is Wholesale Customer** (highlighted with a blue box)
- Add Billing Address Now**

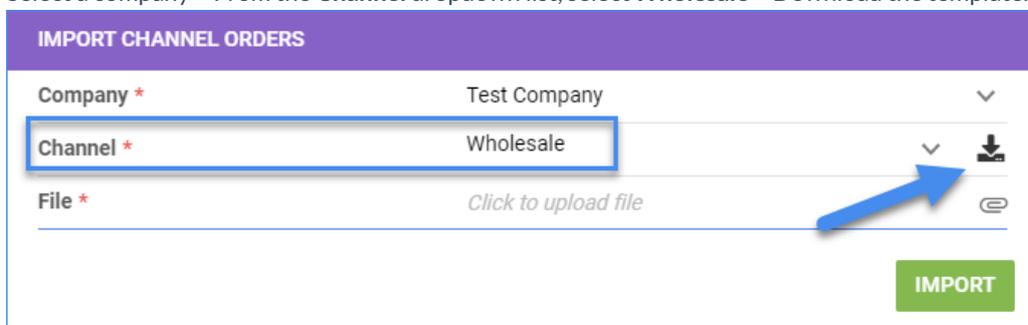
A blue arrow points to the 'Search Customers' button in the top right corner.

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.



The screenshot shows the 'IMPORT CHANNEL ORDERS' form with the following fields and options:

- Company \***: Test Company
- Channel \***: Wholesale (highlighted with a blue box)
- File \***: Click to upload file

A blue arrow points to the download icon next to the 'Channel' dropdown. The 'IMPORT' button is visible at the bottom right.

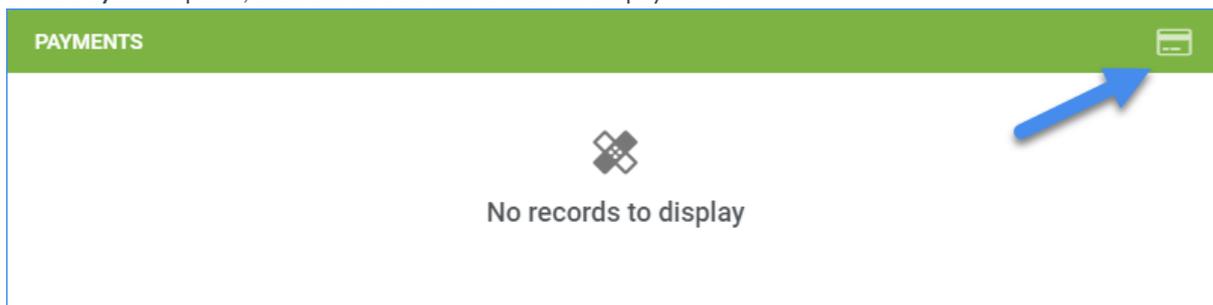
3. In the downloaded file, populate the fields and save the file.
4. Return to Sellercloud > **Click to upload file** and attach the saved file > **Import**.

# 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.**

Order Number	Date	Sold To	Total	Qty	Status	Payment	Confirmed	Shipping
5070060	06/04/2021 06:01:AM		\$0.00	0				
5070061	06/04/2021 06:01:AM		\$0.00	0				

**Payment Details**

Total amount:

Payment Date:

Payment Method:

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:

THANK YOU FOR YOUR PAYMENT

**DETAILS**

**Merchant:** Test Company

**Order ID:** 5073699

**Email:** customermail@gmail.com

**Order Date:** 07-23-2021 06:21 PM

**Channel:** Wholesale

**Payment Status:** Fully paid

**SHIPPING ADDRESS**

Test Test

352 Del Parque

MIAMI, FL 33166-2635

United States

7321581958

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.

ORDER NUMBER	DATE	SOLD TO	TOTAL	UNITS	PAYMENT	SHIPPING	RUSH
5073699	07/23/2021 11:21 AM	customermail@gmail.com	\$59.98	3	Charged	Not shipped	No

4. Click **Send**.

You can send the payment activity and invoice information to the customer in a form of a [Statement 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**.

SKU	ITEM	CASE PRICE	DISCOUNT	QTY OF CASES	QTY/CASE	TAX EXEMPT	NOTES	WAREHOUSE	LINE TOTAL
3147135	HP EliteBook 840 G1 Intel Core i5 E	\$259.99	\$0.00	1	1	<input type="checkbox"/>		Warehouse A	\$259.99
	Yullia's kit	\$20.00	\$0.00	1	1	<input type="checkbox"/>		Warehouse A	\$20.00

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**.

SKU	REFERENCE	ITEM	CASE PRICE	UNIT PRICE	QTY OF CASES	TOTAL UNITS	QTY/CASE	TAX EXEMPT	BACKORDER	NOTES	PICKED	WAREHOUSE	LINE TOTAL
3147135		HP EliteBook 840 G1 Intel...D 14" TOUCHSCREEN Laptop	\$259.99	\$129.99	2	4	2	<input type="checkbox"/>	0		0	Warehouse A	\$519.98
			\$20.00	\$20.00	1	1	1	<input type="checkbox"/>	1		0	Warehouse A	\$20.00

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.