Running a wholesale or distribution business

Industry guides

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Set up credit customers, price lists, deliveries and collections for a business that sells in bulk.

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Plan availability

Needs the **Kuza** or **Enterprise** plan, which include selling, buying and stock.

Who this is for

Businesses that sell larger quantities to shops, institutions and other businesses, often on credit and with delivery.

Modules you will use

Selling, Stock, Buying, Accounting. Point of sale only if you also have a counter.

Set up, in this order

1. **Company, tax and warehouses.** Include delivery vehicles' stock if goods are loaded for the route. See Warehouses and business locations.
2. **Items and price lists.** One price list for each customer type, such as *Wholesale* and *Distributor*. See Creating items.
3. **Customers.** Add payment terms and a **credit limit** to each. See Creating and managing customers.
4. **Suppliers.** See Creating and managing suppliers.
5. **Users.** Sales staff, store and accounts. See Permissions and restricting access.

The order-to-cash flow

1. The salesperson creates a **quotation** or a **sales order**. See From quotation to invoice.
2. The store prepares and issues a **delivery note**, and the customer signs it.
3. Accounts raises the **sales invoice** from the delivery note, with the right tax. See Creating a sales invoice.
4. The customer pays, and accounts records the payment. See Recording customer and supplier payments.

Collections

- Check the **Accounts Receivable** report every week, sorted by age.
- Send reminders using a notification. See Workflows and notifications.
- Put customers over their credit limit on hold until they pay.

Buying

Reorder using reorder levels and material requests. See The procurement cycle. Track landed cost if you import. Ask your accountant.

Tips for wholesalers

- Do not tick **Update Stock** on invoices that follow a delivery note.
- Use **Auto Repeat** for standing monthly orders. See Kanban boards, recurring documents and bulk tools.
- Let key customers see their statements on the customer portal.
- Use the pipeline for new accounts. See Sales pipeline and CRM reports.

Common mistakes

- Delivering without a signed delivery note.
- Letting credit limits be ignored, so old debts grow.
- Wrong price lists on invoices.

Next steps

Read the sales representative guide and the accountant guide.

Related documentation

- From quotation to payment
- Creating and managing customers
- Warehouses and stock entries
- Recording customer and supplier payments