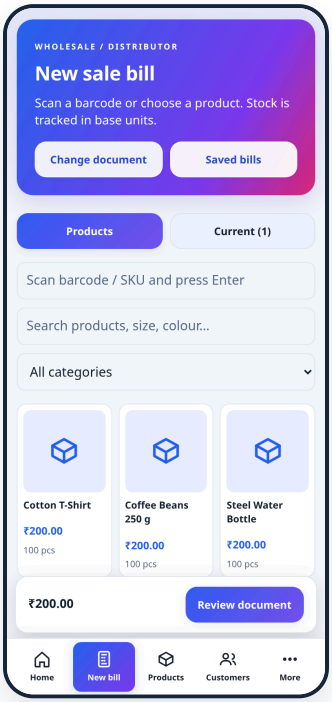
BUSINESS 02 · GET READY

Wholesale / Distributor

From bulk order to collection.

Best for: Distributors, dealers, stockists and businesses selling in bulk.



Actual app interface in an isolated browser preview. Fictional sample records; native activation and hardware are not demonstrated.

1. **Choose the preset**
   Settings → Features → Business type → Wholesale / Distributor.
2. **Set units and packs**
   Use one base unit. Example: base = piece; box factor = 12. Opening stock is in base units.
3. **Set customer terms**
   Choose customer rates, quantity tiers, due days, credit limit and salesperson / route when needed.

Your main tools
Sales orders · Delivery challans · Purchase orders · Goods receipts · Collections & advances

BUSINESS 02 · DAILY WORKFLOW

Follow these steps.

1. **Create a sales order**
   Choose the customer, products, pack quantities, agreed rates and delivery details.
2. **Allocate stock**
   Allocate available quantities in base units. Part allocation is allowed.
3. **Dispatch a challan**
   Dispatch the allocated goods and record packages / transport details. Stock reduces at dispatch.
4. **Invoice the challan**
   Create its linked invoice once. This does not reduce stock again.
5. **Record collections**
   Allocate one receipt across the intended invoices. Unused money remains a customer advance.
6. **Review pending work**
   Check undelivered orders, unbilled challans, overdue invoices and customer ageing.

Boxes without stock confusion
Opening stock: 100 pieces. Dispatch 2 boxes × 12 = 24 pieces. Expected stock: 76 pieces. Creating the invoice from that challan keeps stock at 76.

BUSINESS 02 · STAY IN CONTROL

Useful tools. Clear checks.

Purchase order to receipt

Create a supplier order, receive paid and free base quantities, then match the receipt to a supplier bill once. The bill must not add stock again.

Rates and tax

Wholesale, tier and customer-specific rates are per base unit excluding GST. Review the preview after packs, schemes and discounts.

Credit and linked returns

Use recorded approval for credit-limit overrides. Return against the original invoice so quantities, batches, prices and taxes stay linked.

Reports

Review 0–30, 31–60, 61–90 and 90+ day dues, supplier balances, pending orders, stock and salesperson performance.

Before you finish

- ✓ Pack factors are correct before transactions begin.
- ✓ Free quantities are received as real stock.
- ✓ A challan is invoiced once; a goods receipt is matched once.

Dispatch and goods receipt move stock. Re-entering the same goods in a separate direct sale or purchase would count them twice.