

THE WHOLESALE SUITE PLAYBOOK

How To Add Wholesale To Your WooCommerce Store

The complete, up to date guide to pricing, ordering, onboarding, payment terms and quotes, built around the six plugins that make up Wholesale Suite today.

Wholesale Pricing

One-Page Ordering

Lead Capture

NET Payment Terms

Request a Quote

5

plugins in the Suite plus
one FREE version

25k+

WooCommerce stores
already running it

10+

years helping store
owners sell wholesale



Wholesale Suite

wholesalesuiteplugin.com

Trusted by 25,000+ WooCommerce stores

START HERE

A Fresh Start For Your Wholesale Channel

Adding wholesale to a WooCommerce store used to mean spreadsheets, email threads and a lot of manual admin. It does not any more. This guide walks the whole journey, from setting your first wholesale price to letting a buyer order on NET 30 terms or negotiate a quote, using the current Wholesale Suite tools and the current WooCommerce admin.

WHAT'S NEW IN THIS EDITION

If you read an earlier version of this guide, a lot has changed. Wholesale Suite is now **six plugins**, not four. There is a dedicated **Wholesale** menu in your WordPress admin instead of settings scattered under WooCommerce. And two entirely new plugins, **Wholesale Payments** and **Wholesale Quotes**, close the two biggest gaps B2B sellers kept running into. Those gaps are getting paid on terms, and agreeing a price before the order is placed.

The Five Things You Will Be Able To Do By The End

- 1 Price for wholesale with confidence.** You get a strategy for landing on a wholesale number that still leaves you a business, then the clicks to set it.
- 2 Let buyers order in seconds.** Replace the order spreadsheet with a searchable one-page order form that uses your real cart.
- 3 Recruit and qualify buyers on autopilot.** You get a wholesale-specific registration form, an approvals queue, and the questions that filter out tyre-kickers.
- 4 Offer real payment terms.** NET 30, 60 and 90 day terms, deposits and instalment plans, with invoicing and collection handled for you.
- 5 Quote before you sell.** Let buyers build a request, then approve, adjust or decline it and convert it straight into an order.

How to use this guide. Chapters 1 to 3 are the foundation and work with the free plugin alone. Chapters 4 to 8 each cover one paid plugin, so you can skip to the problem you actually have. Chapter 9 is a 30 day launch plan if you would rather be told what to do in what order.

NAVIGATE

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CHAPTER 01

The Wholesale Opportunity

Wholesale is the rare growth channel where a single customer can be worth a hundred retail ones, and where the buyer is actively looking for you.

A retail customer buys once and you hope they come back. A wholesale customer places a repeating, forecastable order and, if you treat them well, tells other buyers in their trade. The economics are different enough that many stores end up with wholesale quietly out-earning retail.

The catch has always been the plumbing. A retail storefront is built around one-off, full-price, pay-now transactions. Wholesale buyers need different prices, different minimums, different tax and shipping treatment, a faster way to order 80 line items, and very often an invoice rather than a card payment. Bolting that onto a retail theme by hand is where most stores stall.

The Five Jobs A Wholesale Channel Has To Do

Everything in this guide maps onto one of these. If your wholesale channel feels stuck, it is almost always because one of the five is missing.

1

Price

Show the right price to the right buyer, automatically, the moment they log in.

2

Order

Let them buy the whole catalogue from one page without fighting your retail interface.

3

Onboard

Recruit, qualify and approve buyers without doing it all by email.

4

Pay

Offer the terms real trade buyers expect, such as deposits, instalments and NET 30.

5

Quote

Agree a price before the order when volume or specifics need a conversation.

THE GOOD NEWS

You do not need a separate B2B platform, a second website, or a developer. All five jobs run on the WooCommerce store you already have, and the first one is free.

CHAPTER 02

How To Price Retail Products For Wholesale

Pricing conversations are always subjective, so treat any magic formula with suspicion, including the ones below. Your strategy depends on your business, your market and where you want to be in a few years.

Pricing Is Hard, And There Is No Way Around It

You still have to price your goods to sell them. Knowing what to charge is often more art than science. There is enough science here to keep you out of trouble, and to help you build something sustainable rather than something that merely sells.

Working The Equation Forwards

If you have been trading a while, you have probably already got a retail price and you are working backwards from it. Most pricing experts would call that the wrong direction. The textbook approach builds up from cost.

Materials Cost + (Labour × What Your Time Is Worth) + Overheads + Profit Margin

= Wholesale Price

That is the ideal, and it is rarely what happens. In practice most people land on something closer to this.

Retail Price × 0.6

= Wholesale Price (40% off retail)

So Which Should I Use?

Both have merit, and both are a little blind. When I said pricing is subjective, you may have assumed I meant your subjectivity. I actually mean the customer's. That is why, for retail and wholesale alike, I prefer **value based pricing**.

Cost Based Pricing

Add up every cost, then mark it up by a set percentage. It can leave money on the table and start a race to the bottom with competitors. The first part of your business to suffer in that race is wholesale.

It ignores what the market believes your product is worth.

Value Based Pricing

Research what the market will bear, then decide where you want to sit in it. You price to perceived value and defend it with quality signals rather than discounts.

Harder work up front, and much better margins.

Value Based Pricing In Four Steps

1 Work Out Where Your Product Actually Sits

Analyse the market honestly and decide where you fit. As a rule I advocate positioning in the **top third**, unless it is genuinely oversaturated with everyone else trying the same thing. The top third allows for bigger margins, and bigger margins are what fund a wholesale tier.

2 Talk To Your Customers

Get the product into real hands and focus hard on what would improve the *appearance* of quality. Perceived quality means a higher price, and a higher price means better margins. This is the cheapest pricing research you will ever do.

3 Sanity Check Your Retail Price Against Cost

Your final retail price should be more than **2 times** your cost of production, and preferably **4 to 6 times** it. Use the cost based formula for this check only. If you are below that, re-evaluate your market position or trim your costs before you go any further.

4 Now Set Your Wholesale Price

At 4 to 6 times cost, your retail price has room to support a wholesale business. I would recommend landing around **40% off retail**, which leaves roughly 30% of headroom for you and your buyer to run promotions with. If you are planning multiple wholesale tiers, **do not go deeper than 50% off retail**, and pair the deepest tier with minimum order quantities.

IMPORTANT: THIN MARGINS KILL WHOLESALE FIRST

If your margins are too thin, your business will not be viable as a wholesale supplier at all. Wholesale buyers expect deep discounts so they can make their own money, and you should give them a genuinely good deal. You are also in business to make money, though. The margin has to be built into your prices *before* the wholesale discount, not found afterwards.

One More Consideration: Minimum Advertised Price

Now that you have your price points, there is a protection worth knowing about.

In most countries it is not legal to dictate the price your wholesale customers *sell* your product at. You generally *can* have them sign an agreement that restricts the minimum price they may **advertise** it for.

Look at promotions near you and you will spot it in the wild. A sign reading "Too hot to advertise, call for pricing" is usually a retailer working around exactly this clause. One of the most disciplined users of the strategy is Apple. You will never see an Apple product advertised at a steep discount against other retailers.

WHY IT MATTERS TO YOU

A minimum advertised price stops your wholesale customers competing viciously with each other. That protects their margin, which protects their re-orders, and their re-orders are the part that actually pays you.

Pricing: Art Or Science?

It is both, and that is fine. There are many defensible ways to arrive at a wholesale and retail price, and there is no single wrong one. It depends on you, your market, your positioning, your business and your plans. If you take away only a couple of points from this chapter and apply them, you will be better off than when you started.

NEXT UP

You have a number. Let's put it into WooCommerce, and it costs nothing to do.

BEFORE YOU MOVE ON

- ☐ You know your cost of production per product
- ☐ Your retail price is at least 2 times cost, and ideally 4 to 6 times
- ☐ You have picked a wholesale discount, and around 40% off retail is a good default
- ☐ If you are planning tiers, you have decided how deep the deepest one goes, and what minimum order it requires
- ☐ You have considered whether you want a minimum advertised price agreement

CHAPTER 03

Setting Up Wholesale Pricing, Step By Step

Everything in this chapter is done with the free plugin. No licence, no trial, no credit card.

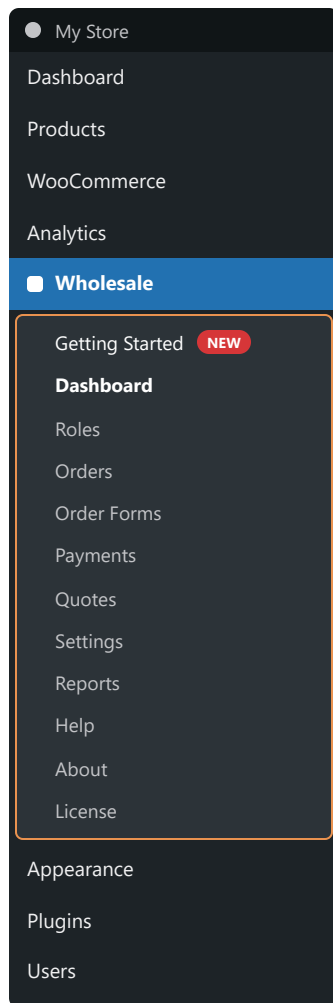
1 Install Wholesale Prices (Free)

In your WordPress admin go to **Plugins › Add New Plugin**, search for **Wholesale Suite** or **WooCommerce Wholesale Prices**, then click **Install Now** and **Activate**.

2 Meet Your New Wholesale Menu

This is the biggest change if you have used the plugin before. Wholesale settings no longer live buried inside WooCommerce. Activation adds a dedicated **Wholesale** item to your admin sidebar, with a modern dashboard behind it. Every plugin in the Suite adds its screens here, so there is one place to work.

YOUR WORDPRESS ADMIN



WHAT EACH SCREEN DOES

Getting Started	A guided walkthrough of first time setup. It appears on new installs.
Dashboard	Your wholesale overview screen.
Roles	Create, rename and manage wholesale customer roles.
Orders	Jumps to your orders list, pre-filtered to wholesale orders only.
Order Forms	Build and manage one-page order forms.
Payments	Payment plans, invoices and your Stripe connection.
Quotes	The quote request queue.
Settings	One tabbed screen, with a tab per plugin you have active.
Reports	Wholesale sales reporting, also linked from Analytics.
Help, About, License	Docs, the rest of the Suite, and licence activation.

Who can see it? By default the Wholesale menu is available to *Administrator* and *Shop Manager*. You can grant other roles access under **Wholesale › Settings › Wholesale Prices › Admin Roles**.

3 Set A Wholesale Price On A Product

Open any product for editing. In the **Product data** panel, on the **General** tab, you will find a new **Wholesale Prices** group with a block for each wholesale role you have. For each role you get two fields.

Product data
Simple product ▾

General

Inventory

Shipping

Linked Products

Attributes

Advanced

Regular price (\$)

99.00

Sale price (\$)

Wholesale Prices

Wholesale Customer

Discount Type

Fixed ▾ ?

Wholesale Price (\$)

59.40 ?

Discount Type

Choose **Fixed** to type an exact wholesale price, or **Percentage** to discount off the retail price instead.

Wholesale Price

The price only wholesale customers will see. With *Percentage* selected you enter the discount instead, and this is calculated for you.

Save the product and you are done. That price is now live, but only for logged in users who hold that wholesale role. Everyone else keeps seeing your retail price.

PERCENTAGE IS THE SHORTCUT MOST PEOPLE MISS

If your wholesale discount is the same across a lot of products, set **Discount Type** to **Percentage** and enter the discount rather than recalculating a fixed price for every item. Change your retail price later and the wholesale price follows automatically. For a single rule that covers your *entire* catalogue or a whole category at once, see Chapter 04.

If The Wholesale Price Is Not Showing

CHECK	WHY IT MATTERS
Are they logged in?	Wholesale pricing is applied on login. A logged out visitor always sees retail, by design.
Do they hold a wholesale role?	Open the user under Users > All Users and confirm their role. This is the single most common cause.
Did the product save?	Re-open the product and confirm the value is still in the field, especially after a Quick Edit.
Are you on the latest version?	Pricing display, filtering and third party compatibility fixes ship regularly. Update before you debug.

Variable Products

Variable products are priced per variation, not at the parent level. Open the **Variations** tab, expand a variation, and you will find the same **Wholesale Prices** panel with its own Discount Type and price. Set each variation independently, because you can wholesale some variations and not others.

Bulk editing. Wholesale prices work with WooCommerce's built in CSV import and export tool, so a large catalogue does not have to be done by hand.

4 Give A Customer Wholesale Access

Wholesale prices are attached to a **user role**, not to individual accounts. The free plugin adds one role called **Wholesale Customer**, which behaves like WooCommerce's normal *Customer* role but marks that person as trade.

To grant access, go to **Users › All Users**, edit the person, and change their **Role** to *Wholesale Customer*. Next time they log in, they see wholesale pricing. That is the entire mechanism.

Want to call it something else, such as Trade Customer, Stockist or Distributor? Rename it under **Wholesale › Roles**.

5 Check Your Work With Preview Mode

This is new and it will save you a lot of time. You no longer need to create a dummy account and open a private browsing window just to see what a buyer sees.

Visit your storefront while logged in as an admin and use the **Preview as wholesale role** control in the WordPress admin bar. Pick a role and the storefront renders exactly as that role would see it, including prices, hidden retail prices and premium pricing rules.

PREVIEW MODE IS SAFE TO USE ON A LIVE STORE

The override applies to the storefront only, and only to the admin who switched it on. Real customers and other logged in users are never affected, so you can check pricing on production without a staging site.

STILL WORTH DOING ONCE

Preview mode shows you pricing. Creating one real test wholesale account is still the best way to check the parts preview cannot cover, such as registration, login, emails and a genuine test checkout.

What Else The Free Plugin Gives You

The free settings are deliberately light, because most of the work happens on the product screen and the user role. Find them under **Wholesale > Settings > Wholesale Prices**.

TAB	WHAT YOU CAN CONTROL THERE
General	Usage tracking opt-in, and a store-wide switch to disable WooCommerce coupons for anyone holding a wholesale role.
Price	The label shown before the wholesale price, whether the retail price is hidden from wholesale buyers, how variable product price ranges display, and catalog mode.
Tax	Exempt wholesale roles from tax, choose whether shop and cart prices display including or excluding tax, and set your own price suffixes.
Admin Roles	Which WordPress roles can reach the Wholesale dashboard and settings. Administrator and Shop Manager are allowed by default.

Catalog Mode Gives You A Private Store, Free

One free setting deserves its own mention. Turn on **Hide price and add to cart** and your store becomes a catalogue. Visitors can browse products, but pricing and purchasing are hidden until they log in. You can pair it with a replacement message pointing people at your wholesale registration form.

That single option covers two common setups without any custom work.

- ✓ A **wholesale only business** that still wants a public web presence and product catalogue, with no public prices at all.
- ✓ A **retail store with a private trade section**, where trade pricing is only ever visible to approved, logged in buyers.

It Plays Nicely With What You Already Run

Compatibility is the quiet feature here. The free plugin works with any theme, with WooCommerce's CSV import and export, with WPML for translation, on multisite, and with multi-currency via Aelia Currency Switcher, WPML Currency and WOOCs.

CHAPTER 03 COMPLETE, YOU NOW HAVE

- ☐ The free plugin installed and a Wholesale menu in your admin
- ☐ Wholesale prices set on your products, either fixed or percentage
- ☐ At least one customer holding the Wholesale Customer role
- ☐ Confirmation, via preview mode, that the right price shows to the right person

CHAPTER 04

Scaling Pricing With Prices Premium

The free plugin gives you one wholesale tier and per-product prices. Premium is where wholesale stops being a price field and becomes a pricing system.

Wholesale Prices Premium is an add-on to the free plugin. You keep the free plugin installed and Premium extends it. Almost everyone reaches for it for one of three reasons. They need more than one tier, they do not want to price products one at a time, or they need wholesale-specific rules for tax, shipping and payment.

1. Unlimited Wholesale Tiers

Add as many roles as you like under **Wholesale > Roles**. Each new role gets its own set of price fields on every product, so you can run structures like this.

Bronze 25% off	Silver 35% off	Gold 45% off
--------------------------	--------------------------	------------------------

Two patterns come up again and again. The first separates *domestic from export* buyers so each gets its own pricing, minimums and shipping. The second builds genuine *loyalty levels* where terms improve as a buyer grows.

2. Rule Based Pricing, So You Stop Editing Products

Per-product pricing does not scale past a few hundred SKUs. Premium lets you set pricing as rules instead, applied per wholesale role.

Global percentage discount	One rule, whole catalogue. Gold gets 45% off everything.
Category discounts	Different percentages per product category, so margin-sensitive lines can be discounted less.
Quantity based discounts	Price breaks that improve with volume, the classic wholesale lever for lifting order size.
Cart subtotal discounts	Extra discount once the cart passes a value threshold.
Wholesale sale prices	Run a temporary wholesale-only sale, with scheduled start and end dates.

SET THE FLOOR, THEN THE EXCEPTIONS

The tidiest way to run a big catalogue is three layers. Use one global percentage per role as your baseline, add category rules for the lines that need different treatment, then set per-product prices only for genuine exceptions. After that you rarely touch a product again.

3. Rules For How Wholesale Orders Behave

Price is only half of it. Wholesale orders need to behave differently at checkout too, and each of these can be mapped per wholesale role.

Minimum Order Requirements

Require a minimum order value or quantity before wholesale pricing activates. It is also available per product, with minimum and step quantities, so cases of 12 can only be bought in twelves.

Product Visibility

Show or hide products by wholesale role. Run a wholesale-only range, hide retail-only lines from trade buyers, or open a handful of products to the public in an otherwise wholesale-only store.

Advanced Tax

Tax exemption per role, plus role to tax class mapping, overriding the store default where a particular buyer needs different treatment.

Shipping Mapping

Give wholesale roles their own shipping methods, such as freight and pallet options for trade and standard couriers for retail.

Payment Gateway Mapping

Control which gateways each role sees, and add or remove a surcharge per gateway. You might offer bank transfer for trade and cards for retail.

Wholesale Reports

Reporting that separates wholesale from retail revenue, under [Wholesale › Reports](#) and linked from [Analytics › Wholesale](#).

4. Wholesale Role Automation

Tiers are only useful if people move between them, and moving people by hand does not happen. Role Automation turns your tier structure into rules that run themselves.

Build rules under [Wholesale › Settings › Wholesale Prices › Wholesale Role Automation](#). Each rule says which group of customers to watch, which metric to measure, and which role to move them to when they cross a threshold.

MEASURE

Total spend, or number of completed orders

OVER WHAT WINDOW

Lifetime, or a rolling number of days

THEN

Upgrade to a role, and optionally downgrade if they fall back below it

Rules are prioritised so overlapping ones resolve predictably, changes are written to an audit log so you can see why someone moved, and refunds trigger a re-evaluation so a reversed order does not leave someone in a tier they no longer qualify for. A daily sweep catches rolling windows expiring even when no new order comes in. Customers can be emailed automatically when they are upgraded or downgraded.

IN PRACTICE

You might promote any non-wholesale customer to Bronze after \$5,000 lifetime spend, then move Bronze buyers to Silver at 25 completed orders in a rolling year. Set it once and your loyalty ladder runs without you.

Free vs Premium At A Glance

CAPABILITY	FREE	PREMIUM
Wholesale Customer role	●	●
Per-product wholesale price, fixed or percentage	●	●
Variable product pricing per variation	●	●
Hide retail price, catalog mode, disable coupons	●	●
Tax exemption for wholesale roles	●	●
Preview as wholesale role	●	●
Unlimited additional wholesale role tiers	○	●
Global percentage and category based discounts	○	●
Quantity based and cart subtotal discounts	○	●
Scheduled wholesale sale prices	○	●
Minimum order requirements and product step quantities	○	●
Product visibility control per role	○	●
Shipping and payment gateway mapping per role	○	●
Role to tax class mapping	○	●
Wholesale Role Automation	○	●
Wholesale sales reports	○	●

When It Is Worth Upgrading

You do not need Premium to run a wholesale business. You need it when one of these becomes true, and if none of them are, stay on free.

- ✓ You want **more than one wholesale tier**, or different pricing for domestic and export buyers.
- ✓ Setting prices product by product has become the bottleneck, and you want **one rule for the whole catalogue** or per category.
- ✓ You need **minimum orders**, so wholesale pricing only applies to genuine trade quantities.
- ✓ Wholesale buyers need **different shipping, tax or payment options** from retail customers at checkout.
- ✓ You want to **hide certain products** from certain buyers.
- ✓ You want to know **what wholesale is actually earning you**, separately from retail.

CHAPTER 05

Fast Ordering With Wholesale Order Form

Wholesale customers want two things, which are good prices and fast ordering. Most stores solve the first and completely forget the second.

Ask a wholesale buyer to order through your retail storefront and you are asking them to click into 60 product pages, choose a variation, set a quantity and add to cart, one at a time. It is a slow, irritating process, and it caps how much they order.

Why The Spreadsheet Is Not The Answer Either

The usual workaround is an order spreadsheet that customers fill in and email back. It works right up until it does not. Once you are past a few dozen products it becomes a maintenance problem. Have you tried updating pricing on 100 or more rows and then making sure every single customer has the latest copy?

THE HIDDEN COST OF THE ORDER SPREADSHEET

Old copies stay in circulation. You end up with orders at last year's prices, or for products you stopped selling months ago, and someone on your team has to re-key every order into WooCommerce by hand, which is where the real errors creep in.

A Familiar Interface, Without The Maintenance

The **Wholesale Order Form** gives buyers the dense, scannable grid they actually liked about the spreadsheet, without the maintenance. Prices come live from your store, so they are never out of date. It is fully AJAX driven, so nothing reloads as they work. And it adds to your real WooCommerce cart, so orders arrive as normal orders and stock, tax, shipping and reporting all behave.

Q Search products

All Categories ▾

Sort: Name ▾

PRODUCT	SKU	STOCK	PRICE	QTY	
Botanical Hand Cream 100ml	BHC-100	In stock	\$18.00 \$9.90	24	Add to cart
Botanical Hand Cream 250ml	BHC-250	In stock	\$29.00 \$17.40	12	Add to cart
Rosehip Facial Oil 30ml	RFO-030	In stock	\$24.00 \$14.20	36	Add to cart
Clay Mask Sachet, 10 pack	CMS-010	3 left	\$36.00 \$22.00	6	Add to cart

Showing 4 of 128 products

78 units \$1,142.40

Add selected to cart

Illustrative layout. Your columns, styling and which products appear are all configurable per form.

Building Your First Form

A form and a page are created automatically when you activate the plugin, so there is something working immediately. To build more, go to **Wholesale › Order Forms** and click **Add Form**. That screen also lists every form you have created.

Multiple Forms

Build as many as you need, each with its own configuration and its own selection of products. You might have a new season form, a clearance form and an export only form.

Drag And Drop Builder

Assemble the form visually in three sections, which are the **header**, **table** and **footer**, dragging in the columns and elements you want. No code required.

Put It Anywhere

Each form has a shortcode, so you can drop it on any page, and you can even place more than one form on a single page.

Search, Filter, Sort

Live search plus category filtering, and seven sort options per form so buyers land on the products you want them to see first.

Extra Product Columns

Add the columns your buyers ask for, such as SKU, stock, categories and variations, so they can decide without leaving the form.

Favourites And Lazy Loading

Let buyers save favourites for faster re-ordering, and keep very large catalogues fast with lazy loading.

Controlling Who Sees Which Form

Each form has its own **Form Permission** setting, under **Wholesale › Order Forms › Edit Form › Settings**. Restrict a form to specific wholesale roles and anyone else gets an access denied screen instead. Pair that with per-form product filtering, using the gear icon on the category filter to include or exclude whole categories, and each buyer group can have a form that shows only what they are allowed to buy.

ALREADY USING SAVETO WISHLIST?

Recent versions of the Order Form include a **Wishlist** column that sits next to Add to Cart, so buyers can save items for later straight from the form. It appears in the builder's element list when SaveTo Wishlist Lite is active.

WORTH KNOWING

The Order Form is a standalone plugin and does not require the free Wholesale Prices plugin to run. It is just far more useful alongside it, because then it shows each buyer their own wholesale pricing.

CHAPTER 06

Finding And Onboarding Ideal Buyers

Most stores do not have a wholesale lead problem. They have a wholesale *qualification* problem.

The familiar pattern is a revolving door of tyre-kickers asking for a wholesale price sheet and then never ordering, or ordering in dribs and drabs that cost more to service than they earn. These are exactly the people to pre-qualify *before* they become full wholesale customers on your store.

Three Ways To Sort The Wheat From The Chaff

1 Ask Lots Of Questions About Their Business

If you moderate incoming sign-ups, grab contact details, ideally a phone number although email is fine, and try to arrange a time to talk. Many tyre-kickers simply will not reply, which has already done the filtering for you.

When you do get on the phone, ask directly.

- ✓ How long have they been trading?
- ✓ What volumes do they expect to order?
- ✓ What does their next year of business look like?
- ✓ What do they sell, and how do they sell it?

The point is to get the information from the actual person behind the email. It is also good for the relationship, because it shows you are serious about making the arrangement work for both sides.

2 It Is All About Volume

You can pre-qualify before you ever pick up the phone by making applicants answer a volume question on the form itself. Something as simple as a required dropdown asking how many units they expect to sell in the next 3 months will do it.

Setting the lowest option in that list is how you set your barrier to entry. It also sets expectations about what you consider a serious order, and puts applicants in the right frame of mind to qualify themselves out if they are not ready.

3 Set Your Terms

Publish a page setting out the terms and conditions every wholesale customer must meet to keep their wholesale status, and link to it from your registration form.

A terms sheet signals that you run a real wholesale operation and have thought the process through. It also means buyers must accept your conditions of entry to get wholesale status at all.

Capturing And Moderating Buyers Automatically

All three tactics above need somewhere to happen. WooCommerce's built in registration collects an email and a password, which is nowhere near enough to qualify a trade buyer, and it leaves you manually changing user roles for every approval.

Wholesale Lead Capture is built for exactly this. It gives you a wholesale-specific registration form, a dedicated wholesale login, an approvals system and customisable emails. It creates the pages it needs when you activate it.

A Registration Form Built For Trade

Built in fields for first and last name, email, username, password, phone, company name, address and a terms checkbox, each of which you can show, hide, reorder or make required.

Custom Fields

Add your own fields for anything else you need, including that volume dropdown, trade references or a tax registration number. The answers are saved against the user.

Manual Or Automatic Approval

Choose whether new registrations land in a moderation queue for you to approve, or are activated straight away. Either way the correct wholesale role is applied for you.

Customisable Email Sequence

Admin notifications and customer facing confirmation and activation emails, all editable, and able to include your custom field answers via placeholders.

Spam Protection

Honeypot protection is built in, with Google reCAPTCHA available if your form needs more.

Faster First Order

Details captured at sign-up can pre-fill checkout fields, so a new buyer's first order is smoother than their registration was.

How The Approval Flow Actually Runs

1

Buyer Registers

Via your wholesale form. The account is created inactive if you require approval.



2

Emails Go Out

You are notified of the new application, and they get a confirmation with their credentials.



3

You Approve

Their account activates, the wholesale role applies, and they are emailed that they are live.

Switch to automatic approval and the same three stages happen without you. The account activates immediately and both emails still send. Find the choice under [Wholesale > Settings > Wholesale Lead Capture > General](#).

CHAPTER 07

Getting Paid On Terms With Wholesale Payments

Payment terms were the single most requested feature we ever received. This is the answer to it.

Trade buyers frequently do not pay upfront with a card. They expect to place an order and settle it within an agreed period, and NET 30 is the classic example. Others want to pay a deposit now and the balance later. WooCommerce has no concept of any of that out of the box, which is why so many wholesale operations still run terms on invoices and spreadsheets outside the store.

Wholesale Payments brings that process inside WooCommerce. It is built on **Stripe**, so cards, invoicing and collection are handled by a payment provider you already trust rather than by a bolt-on.

Understanding NET Terms

A NET term gives your buyer a set number of days to pay an invoice in full. Wholesale Payments ships with pre-configured templates for the common ones, so you can start from a standard term and adjust it rather than building from scratch.

NET 30

Pay in full within 30 days of the order

NET 60

Pay in full within 60 days

NET 90

Pay in full within 90 days

Custom

Such as 50% upfront, balance at day 30

Setting It Up

1

Connect Stripe

Go to **Wholesale > Payments** and click **Connect with Stripe**. You are returned to your dashboard once it is linked.

2

Build Your Payment Plans

Under **Wholesale > Payments > Payment Plans**, start from a template or create your own.

3

Test A Real Order Before You Announce It

Connecting Stripe is the first step, not the last. Check your Stripe account is out of test mode and your licence is activated, then place a test order on a plan.

Requirements. Wholesale Payments needs WooCommerce and the free Wholesale Prices plugin, plus a Stripe account. Prices Premium is not required.

Anatomy Of A Payment Plan

Each plan is made of instalments, and for every instalment you set how many days after the order it falls due and how much is owed. Amount due can be a **fixed amount**, a **percentage**, or **no payment required**, and that last option is what makes a genuine "nothing now, everything at day 30" term possible.

Payment Plan 50% Deposit, Balance At 30 Days				ENABLED
Day 0	50%	Deposit, taken at checkout		Paid
Day 30	50%	Balance		Due 30 Sep

Each plan also carries a name and a customer facing description, and an enable toggle that controls whether it is offered at checkout.

Who Gets Which Terms

You almost certainly do not want to offer 90 day terms to a brand new buyer. Turn on **payment plan restrictions** and a plan can be limited to particular wholesale roles, such as your Gold tier, or to named individual users. Combine that with Role Automation from Chapter 04 and better terms can become something buyers *earn* automatically.

Collection, Credit Control And Chasing

Automatic Collection

Auto-charge a saved card as each instalment falls due. Leave it off and the plan is billed as a single Stripe invoice the customer pays manually.

Credit Limits

Cap how much a customer can owe at any one time, either globally or per wholesale role.

Overdue Restrictions

When a buyer has unpaid invoices, either hold their new order as *On Hold* for review, or block payment plan checkout entirely. You can set a days past due grace threshold.

Email Reminders

Remind customers before and after a payment falls due, so chasing is not a manual job.

ACH Bank Payments

Accept US bank transfers alongside cards on US Stripe accounts, which is often much cheaper on large trade orders.

Invoice Visibility

Buyers see their schedule and invoices under *My Account, Orders*. You see payment status on the order screen and in the invoice list.

Three Statuses To Watch

● **Due.** Payment pending, with the upcoming date.

● **Paid.** The order is fully settled.

● **Overdue.** The due date passed unpaid.

CHAPTER 08

Negotiating At Scale With Wholesale Quotes

Not every wholesale deal starts with a published price. Sometimes the price is the conversation.

Large orders, first orders from a significant buyer, unusual mixes and freight-sensitive shipments all have something in common. The buyer wants a number before they commit, and you want to see what they are asking for before you give one. That negotiation normally happens over email, which means it is invisible, unstructured and easy to lose.

Wholesale Quotes turns it into a proper workflow inside WooCommerce. Buyers assemble a request from your catalogue, you review, adjust and approve it, and an approved quote converts straight into a real order.

What Happens The Moment You Activate It

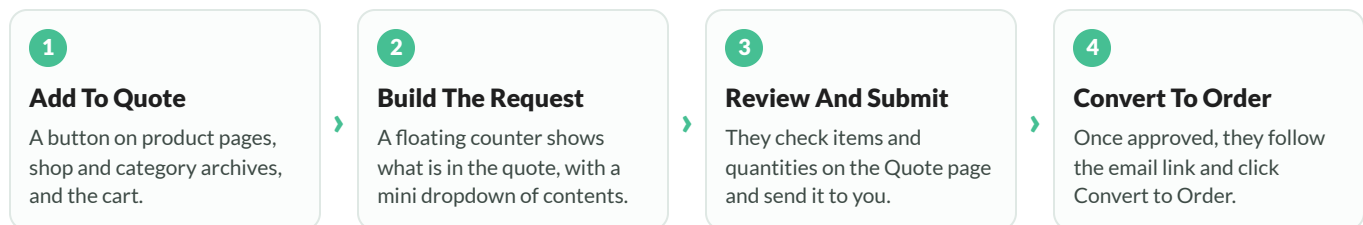
Two pages are created for you, so the flow works immediately.

Quote `/quote` Where buyers review the items they have added and submit the request. It uses the `[wholesale_quotes_page]` shortcode.

View Quote `/view-quote` Where buyers land from your approval email to see the quote and act on it. It uses `[view_quote]`.

There is also an optional `[wholesale_quotes_history]` shortcode. Add it to a page of your own to give buyers a My Quotes history.

The Buyer's Side



TWO SWITCHES WORTH KNOWING ABOUT UP FRONT

Cart to quote adds a Request a Quote button to the cart, turning a cart someone hesitated over into a conversation. And **guest quotes** lets people request a quote without an account at all, which makes the quote form a lead generation tool as much as a sales one.

Your Side: The Quotes Dashboard

Quotes land at [Wholesale › Quotes](#), a paginated list you can search by quote number, quote ID or customer email, and filter by status or customer. You can also create a quote yourself for a buyer, which is useful when the conversation started on the phone.

Quotes					
			Search quotes		All statuses ▾
QUOTE	CUSTOMER	ITEMS	TOTAL	STATUS	
#WQ-1042	Harbour Apothecary	14	\$2,860.00	PENDING	View
#WQ-1041	Northside Grocers	32	\$5,410.00	APPROVED	View
#WQ-1039	Bay Wellness Co	6	\$740.00	EXPIRED	View

Open any quote and you can review the line items, **adjust quantities and edit prices**, then **Approve** or **Decline** with a message to the customer. You can convert an approved quote into a WooCommerce order directly, and message the buyer without leaving WordPress.

Quote Statuses

STATUS	WHAT IT MEANS
PENDING	Submitted by the buyer and waiting for your review. You can approve, decline, edit, message or delete.
APPROVED	You have accepted it. The buyer is emailed and can convert it to an order.
DECLINED	You have rejected it, optionally with an explanation.
EXPIRED	The quote aged out. You can still approve or convert it from the admin, because expiry only stops the buyer acting on it.

Settings You Will Want To Review

Everything lives under [Wholesale › Settings › Wholesale Quotes](#).

General

Cart to quote, whether quote buttons are restricted to wholesale roles, whether buyers may have several open quotes at once, how out of stock items are handled, minimum quote value, maximum items, and whether retail prices show alongside wholesale ones.

Quote Expiration

How many days before a quote expires, which is **30 days** by default. Set it to 0 if you would rather quotes never expire automatically.

Button Placement And Styles

The Add to Quote button's label, styling and where it appears across product, shop and archive pages.

Notifications

Which emails fire and when, covering submission, approval, decline and expiry, to you and to the buyer.

CHAPTER 09

Your 30 Day Launch Plan

Each week is a couple of hours' work, and you have something live at the end of week one.

Week 1 Get A Working Wholesale Price Live

FREE

- ☐ Work out your cost of production and check your retail price is at least 2 times it
- ☐ Decide your wholesale discount, and around 40% off retail is a sound default
- ☐ Install the free Wholesale Prices plugin and take the *Getting Started* tour
- ☐ Set wholesale prices on your ten best selling products, using Percentage if the discount is uniform
- ☐ Give one real customer the Wholesale Customer role
- ☐ Use *Preview as wholesale role* to confirm what they will see

Week 2 Make It Easy To Become A Customer

LEAD CAPTURE

- ☐ Write your wholesale terms page, covering conditions, minimums and expectations
- ☐ Build your registration form and add the volume question as a required dropdown
- ☐ Decide manual or automatic approval, and edit the three emails buyers receive
- ☐ Link the form from your main navigation and your footer
- ☐ Register a test applicant and walk the whole approval flow yourself

Week 3 Make Ordering Fast

ORDER FORM, PREMIUM

- ☐ Build your first order form and add the columns your buyers actually ask for
- ☐ Restrict the form to your wholesale roles, then place it on a wholesale only page
- ☐ Roll pricing out to the full catalogue with a global percentage rule per role
- ☐ Add your tiers if you need them, plus minimum order requirements
- ☐ Set shipping and payment gateway mapping so trade checkout behaves correctly

Week 4 Remove The Last Two Reasons Buyers Say No

PAYMENTS, QUOTES

- ☐ Connect Stripe and create a NET 30 plan plus one deposit based plan
- ☐ Restrict your longest terms to your best tier, and set credit limits
- ☐ Turn on overdue restrictions and payment reminder emails
- ☐ Activate Quotes, place the Add to Quote button, and enable cart to quote
- ☐ Submit a test quote, approve it, and convert it to an order end to end
- ☐ Set up Role Automation so your tiers maintain themselves from here

THEN TELL PEOPLE

The most common reason a well built wholesale channel stays quiet is that nobody announces it. Email your retail list, because some of your best future stockists are already customers, and add wholesale to your main navigation.

CHAPTER 10

The Suite At A Glance

Six plugins. One free, five premium. Each solves one of the five jobs from Chapter 01.

Wholesale Prices FREE The foundation. Adds the Wholesale Customer role, per-product wholesale pricing on simple and variable products, catalog mode, tax options and the Wholesale menu itself. Everything else builds on it. v2.2.9 wordpress.org	Wholesale Prices Premium PREMIUM Unlimited role tiers, global and category percentage rules, quantity and cart subtotal discounts, scheduled wholesale sales, minimum order requirements, product visibility, tax, shipping and gateway mapping, Role Automation and wholesale reports. v2.1.3
Wholesale Order Form PREMIUM One-page ordering for your whole catalogue. Multiple forms, drag and drop builder, extra columns, live search and filtering, favourites, lazy loading and per-form role permissions. It runs standalone if you want. v3.1.2	Wholesale Lead Capture PREMIUM Wholesale registration form with custom fields, dedicated wholesale login, manual or automatic approvals, customisable email sequences, honeypot and reCAPTCHA spam protection, and checkout pre-fill. v2.0.6
Wholesale Payments PREMIUM NET 30, 60 and 90 day plans plus custom instalment plans via Stripe, role and user restricted plans, automatic collection, credit limits, overdue restrictions, reminder emails, ACH support and invoice management. v1.0.7	Wholesale Quotes PREMIUM Add to Quote buttons, cart to quote, guest quotes, a full admin quote queue with price editing, approve and decline with messaging, quote expiry and one click conversion to a WooCommerce order. v1.0.2

Versions are the latest releases at the time of publication (September 2026). Check your Plugins screen for what you are running. Wholesale Prices is the foundation for most of the Suite, so keep it active and up to date even when you are mainly using the paid plugins.

Requirements

PLUGIN	WORDPRESS	WOOCOMMERCE	PHP	ALSO NEEDS
Wholesale Prices	5.9+	Current	7.4+	None
Prices Premium	6.5+	4.0+	7.4+	Wholesale Prices
Order Form	5.9+	4.0+	7.3+	None
Lead Capture	5.9+	4.0+	7.4+	Wholesale Prices
Payments	5.9+	5.9+	7.4+	Wholesale Prices, Stripe account
Quotes	5.8+	6.0+	7.4+	Wholesale Prices



Wholesale Suite

Ready To Sell Wholesale?

Start free with Wholesale Prices. It is a complete, legitimate way to add wholesale to WooCommerce, and plenty of businesses never need more. When you outgrow it, the **All Access Bundle** gives you all five premium plugins together.

Wholesale Suite All Access Bundle

Wholesale Prices Premium

Wholesale Order Form

Wholesale Lead Capture

Wholesale Payments

Wholesale Quotes

~~\$598~~ **\$299** / year

Introductory pricing, and renewals are at full price. Unlimited sites. 14 day money back guarantee.

[Get All Access Bundle Now →](#)

NOT SURE WHERE TO START?

"My buyers keep asking for a price list."

Wholesale Prices (free), then upgrade to **Wholesale Prices Premium**, then **Order Form**

"I'm drowning in wholesale sign-up emails."

Lead Capture

"They want to pay on 30 day terms."

Wholesale Payments

"Every big order starts with a negotiation."

Wholesale Quotes

[Get The Free Plugin](#)

[Browse The Knowledge Base](#)

Thanks for reading. Now go and sell some wholesale.

Brought to you by the team at Wholesale Suite, helping store owners grow for over 10+ years.