



Local Line

CHAPTER 3

Get Ready to Sell Wholesale

Setting up wholesale ordering

Now we'll explore how to set up wholesale ordering. Once you've locked in your wholesale buyers, you'll need to know how to best accept and fulfill orders. We show you how to track your inventory, create unique price lists for each buyer, and how to make the admin work easy. Let's get ready to sell wholesale!

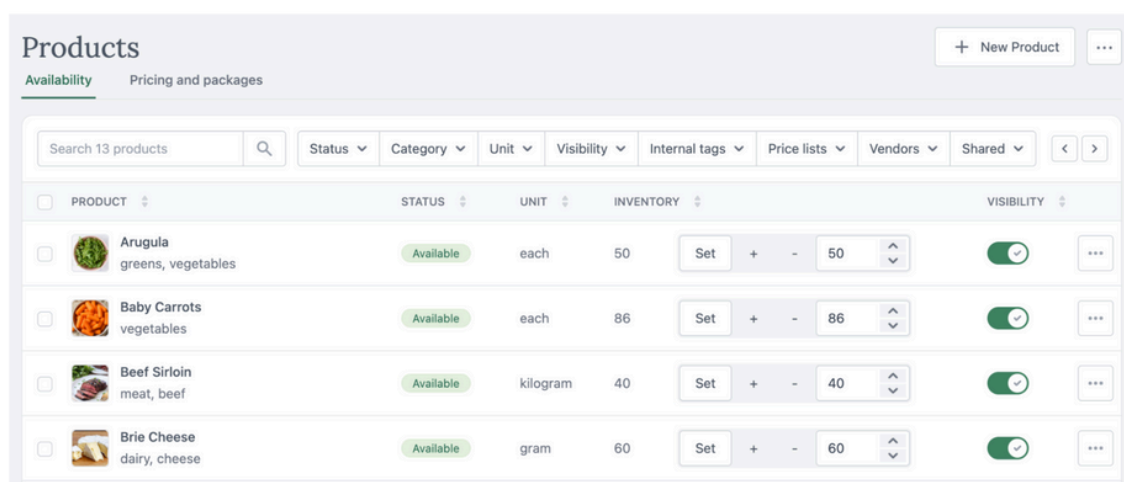
Inventory management

As you scale up your wholesale program, it is essential to have accurate and up to date inventory management. Using a sales tool like [Local Line](#), keep all your inventory organized and in one place. Here's how inventory management works on Local Line!

Tracking inventory

Uploading your inventory into your Local Line store is easy. To upload products individually, select the **+ New Product** button in the top right corner of the **Products** tab. You can add Product Name, Description, Product Photos, and more when uploading products.

When selecting inventory, you can track inventory by item or weight and charge by item or weight. You can then choose from a few pre-created units or create a custom name for units i.e. kg, g, ounces, box, bag, bushel.

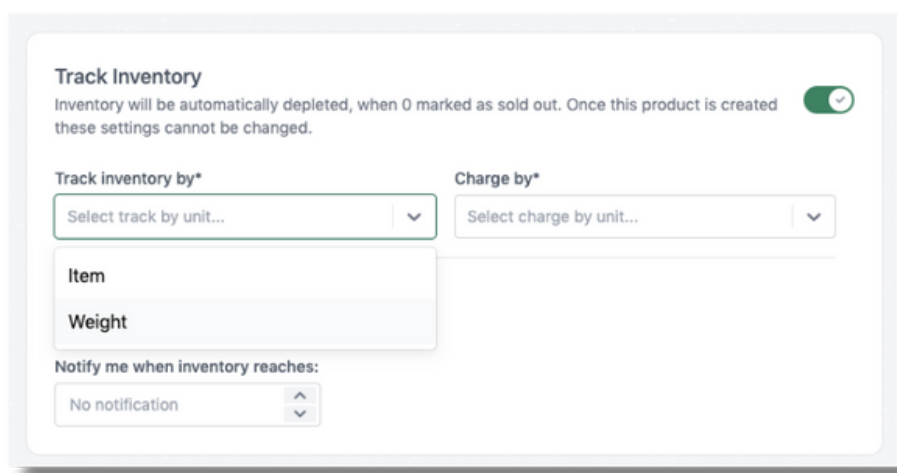


You can also bulk upload products and inventory to your online store by downloading our inventory spreadsheet, filling out the appropriate columns, and importing it into the platform.

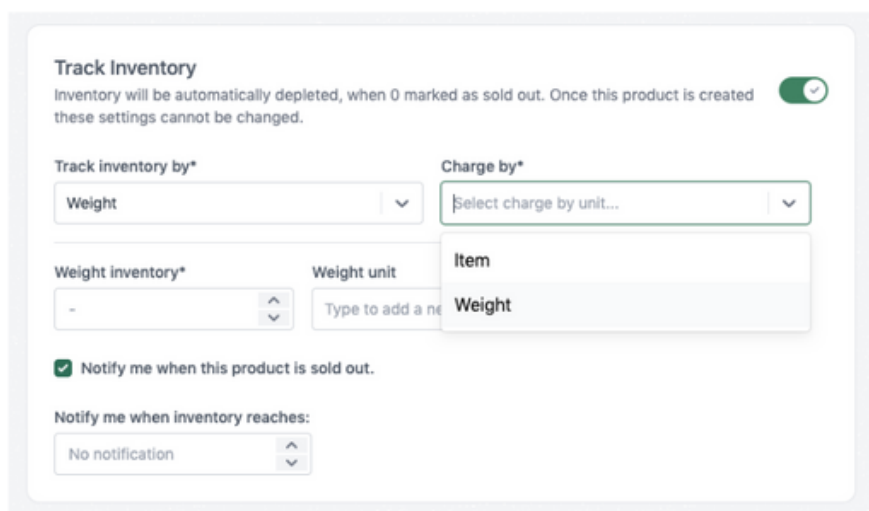
Updating inventory is easy. Head into the products tab, and you can update the live inventory by updating the value in the boxes. This inventory will immediately become live in your online store and subtract as orders are created.

Selling by weight

Local Line works well for farms selling meat, where the product needs to be weighed and finalized before delivery. You can sell a product either by item or weight. For example, you have 20 packs of chicken breasts available (item) or 100 pounds of chicken breast (weight).



Next, you'll indicate whether you charge by weight or by item. To sell by weight, you select Charge By → Weight. This way, when someone orders two packs of chicken breast, you can update the order to account for the exact package weight.



Then, provide the average package weight for your product. For example, if your ribeye steak averages 1.4lb per steak, add this as the average. Add in the price per pound of your product, and the average price of each package will be generated. In your storefront, customers will see both cost per item and price per lb.

Package name*	Avg. pack weight	Price per pound*	Display price
Steak	1.4 pound	23.99 /pound	\$33.59/Steak

107.14 Steak available at \$33.59/Steak consisting of ~1.4pound at \$23.99/pound

Add new package

The final step is to mark the product with “Orders with this product require approval.” This means that after an order has been made on your online store, you can make weight or quantity adjustments.

Product status

Product visibility
When saved this product will be visible in 0 price lists.

Orders with this product require approval
Turn this feature on to approve or modify orders containing this product before collecting final payment. This feature can also be used to update final product weights if applicable.

Adjusting weights

When a customer shops from your online store and orders a product that needs approval, their order will appear in the Orders with a *Needs approval* label.

< Cancel and return to orders

Order 2025387 Needs approval

Placed on 08-06-2022 15:00 by John Doe.

✕ **John Doe**
 johndoe@gmail.com Edit ✕

Public + Add products

! Beef Sirloin meat, beef	Small Sirloin	\$29.75/kilogram	<input style="width: 80%;" type="text" value="1.12"/> kilogram	\$33.32	✕
! Beef Sirloin meat, beef	Small Sirloin	\$29.75/kilogram	<input style="width: 80%;" type="text" value="1.12"/> kilogram	\$33.32	✕
! Tenderloin Beef meat, beef, steak	Tenderloin	\$27.80/kilogram	<input style="width: 80%;" type="text" value="2.4"/> kilogram	\$66.72	✕

3 products Approve

Order Note

This note will be sent to your customer in their order confirmation email.

You can adjust the final weight when you weigh and pack the order. The price will automatically update based on the new weight. Click the *Approve* button to finalize the price.

The order will then appear like this:

< Cancel and return to orders

Order 2025387 Approved

Placed on 08-06-2022 15:00 by John Doe.

✕ **John Doe**
 johndoe@gmail.com Edit ✕

Public + Add products

✔ Beef Sirloin meat, beef	Small Sirloin	\$29.75/kilogram	<input style="width: 80%;" type="text" value="1.12"/> kilogram	\$33.32	✕
✔ Beef Sirloin meat, beef	Small Sirloin	\$29.75/kilogram	<input style="width: 80%;" type="text" value="1.12"/> kilogram	\$33.32	✕
✔ Tenderloin Beef meat, beef, steak	Tenderloin	\$27.80/kilogram	<input style="width: 80%;" type="text" value="2.4"/> kilogram	\$66.72	✕

3 products

Order Note

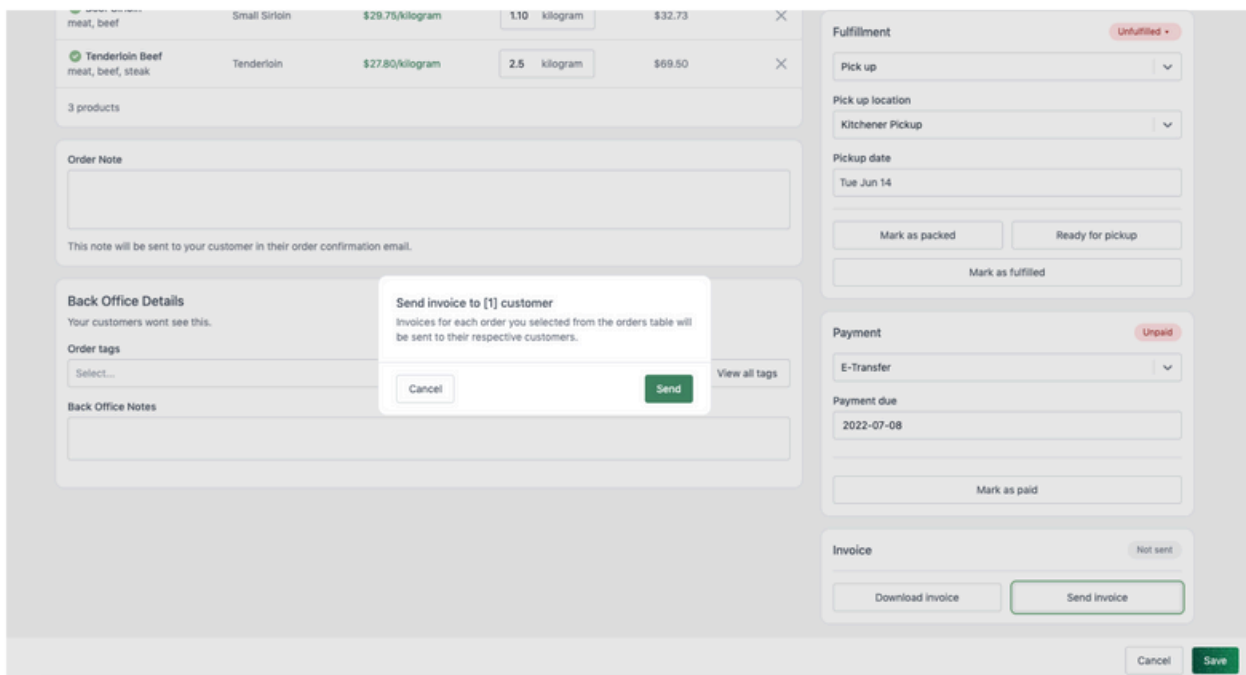
This note will be sent to your customer in their order confirmation email.

If the customer pays with a credit card, their card will be charged with the final amount. If they selected a different payment method, such as a check, you can send them an updated invoice with the new price.



Pro tip: The *Needs approval* workflow also accounts for crop shortages! Even if you don't sell a product by weight, requiring seller approval before charging for an order enables the seller to change quantities should there be a product shortage.

You can send the customer the updated invoice by clicking the Invoice button in the bottom right-hand corner of the order module.





In short, here are the steps you need to follow in Local Line to sell by weight to wholesale buyers:

1. When creating a product, choose to sell the product by the *'weight'* rather than *'item'*.
2. Input an average pack weight and a price per pound.
3. Enable *'orders with this product require approval'*.
4. Buyers who order a product with this feature enabled will be prompted to add their credit card during checkout. They will not be charged upon entering their card details. If you do not accept credit card payments, customers will choose a different payment method and will be sent an invoice to pay.
5. Go to your **Orders** table. Here, orders requiring approval will be denoted by a yellow circle with an exclamation mark beside the order number.
6. To approve an order, click on it and make the necessary adjustments. Click 'Approve' and 'Save' to bill your customer.

Order management

How do wholesale customers order from you?

Have a streamlined process for ordering each week. With your Local Line account, you are able to create individual price lists for each customer segment leveraging one master inventory. First, let's go over how to create a new price list.

A price list is your inventory list. You'll receive a custom URL for each price list that will take shoppers to that price list. With Local Line, you can have as many price lists as you please. Go to the **Price Lists** tab on the left-hand side to create a price list.

Basic info

Price list name*





Restaurants

Price list URL*

restaurants

<https://green-acres-farm-663.localline.ca/restaurants>

Description (Optional)

B I U    

This price list is for restaurant customers.

This will appear on your customers price list listing and on invite emails to this price list.

Default price list

If turned on this becomes the default price list new customers see when arriving at your store.


In the right-hand corner, click **Add a Price List**. You will be prompted to name the price list and select a URL and description here. For example, if you're creating a price list for Restaurant customers, you could title the price list **Restaurants**.

Payment

Cash · Custom

E-Transfer · Custom

Days until payment is due

7 days 

Once due the order will be flagged as overdue on your orders table and the customer will receive an email reminding them to make a payment.

Display discounts

If adjusted prices on this price list are lower than the base price defined for the product the discounted value is displayed to customers.

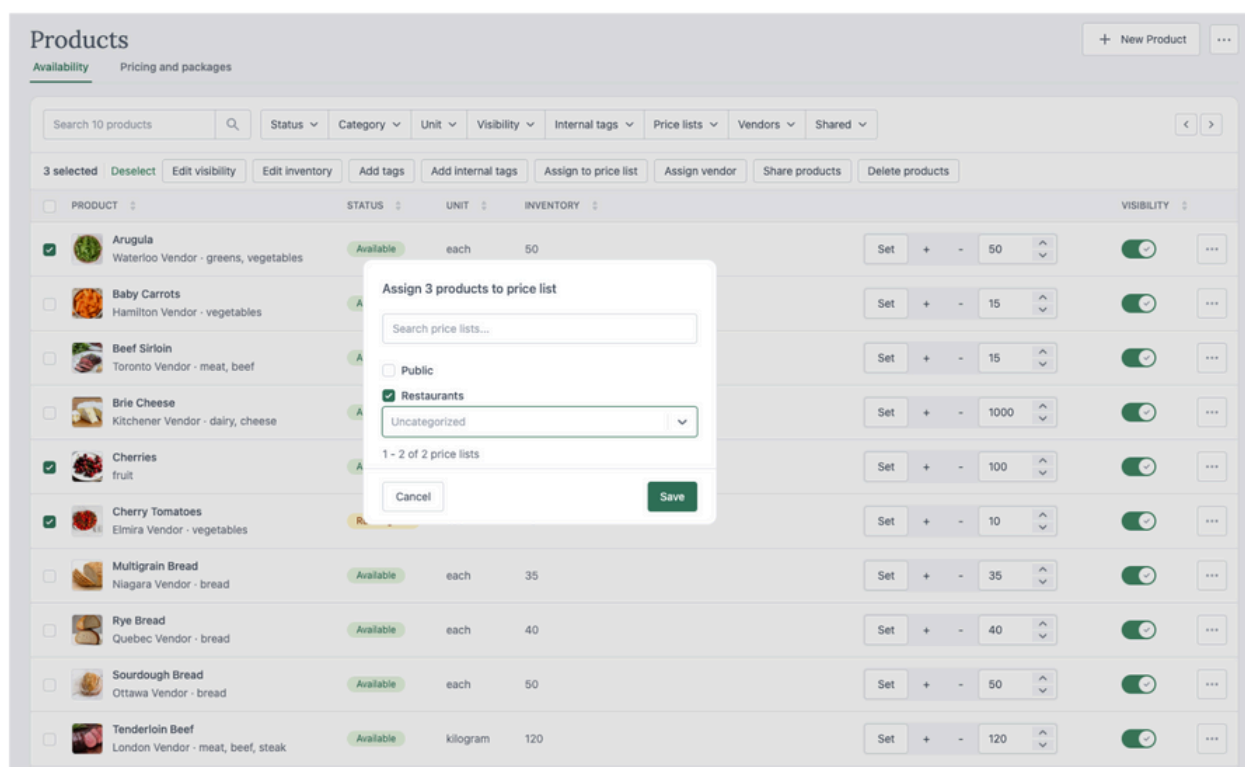
In the payment section, you can set the **Days until payment** is due. If you want payment due at checkout, enter "0 days. If the payment period exceeds 0 days, click the toggle to enable the **Pay Later** feature. When the payment is due, an invoice is automatically sent to the customer and contains a link where they can pay.

Next, define which fulfillment options are available for this price i.e. delivery zones and pick-up locations. You can also enable price list update emails. This feature will send an automatic email to the members of that price list on a daily/weekly basis. Customize the email with a subject line and copy.

Finally, you can set the visibility of the price list to private or public. For wholesale customers, you will want to make your price lists private. This ensures that only those given access to the price list can order.

Assigning products to a price list

To assign products to a price list, select products from the product table and click assign to the price list. You can also assign products to price lists while creating a new product.



Creating products for wholesale price lists

Create unique packages and prices for your wholesale price list. When creating a product, scroll down to **Packages**. Here you will be able to name the package, and assign the size and the price. All packages created will pull inventory from the total inventory set for that product. In the grey box below the package information, the program calculates how many of that package you have available based on the total inventory. You can add and remove packages at any time.

Packages

Create the packaging options you sell this product in. Packages draw from the inventory set above.

Package name*	# of items	Package price*
Small Bunch	1 each	0.5 /Small Bunch
20.00 Small Bunch available at CA\$0.50/Small Bunch consisting of 1 each at CA\$0.50 each		
Large Bunch	5 each	1.99 /Large Bunch
4.00 Large Bunch available at CA\$1.99/Large Bunch consisting of 5 each at CA\$0.40 each		
Bulk Bag	20 each	7.96 /Bulk Bag
1.00 Bulk Bag available at CA\$7.96/Bulk Bag consisting of 20 each at CA\$0.40 each		

[Add new package](#)

After you have created the different packages, you can assign unique packages to different price lists. Select which price list and category you want the package to be visible. You can also add price adjustments to the package i.e., increase or decrease the standard price.

Add Product to Price Lists

Select price lists that this product should assigned to and add price list specific settings.

Public Public

Restaurants Private

Category

[Edit Categories](#)

Available packages and pricing
 Select the packages you want to enable in this price list and apply optional price list specific price adjustments.

Package	Price adjustment	Base price
<input type="checkbox"/> Small Bunch	<input type="checkbox"/>	\$0.5
<input type="checkbox"/> Large Bunch	<input type="checkbox"/>	\$1.99
<input checked="" type="checkbox"/> Bulk Bag	<input checked="" type="checkbox"/>	\$7.96

Taxable
 Turn this on to apply tax on checkout.

Manual ordering

Some buyers might not want to order using your online store. Using Local Line, you can also place orders on your customers' behalf. To create an order for a customer, go to the **Orders** tab and click **Log Order**. Select the customer and add products from your preferred price list.

The screenshot displays the 'Log order' interface. At the top left, there is a link to 'Cancel and return to orders'. The main title is 'Log order'. Below this, customer information for Amelia Watson is shown, including her email (noreply+dummy1@localline.ca) and address (333 Lester St, Waterloo, Ontario N2L 3W6). A 'Restaurants' section lists items added to the order: Arugula (Large Bunch, CA\$1.99 each, 6 items, total CA\$11.94), Cherries (fruit, Pound, CA\$6.99/pound, 4 pounds, total CA\$27.96), and two items of Tenderloin Beef (London Vendor, Tenderloin, CA\$27.80/kilogram, 2.5 and 2.43 kilograms, totals CA\$69.50 and CA\$67.55). An 'Order Note' field contains the text 'Bring to sous-chef at the back entrance.' The right-hand side shows a summary: Subtotal CA\$176.95, Discount CA\$0.00, Total CA\$176.95, and a note about CA\$0.00 Store Credit Available. Fulfillment options include 'Pick up' and 'Delivery' (selected), with a 'Scheduled' status. The delivery address is the same as the customer's. A 'Delivery plan' dropdown is set to 'Select delivery plan...'. At the bottom, there are buttons for 'Cancel', 'Save', and 'Save and go back'.

Add an order note and select the fulfillment plan. You can set statuses for the order such as scheduled, packed, fulfilled, and paid. These statuses will be visible in the orders table. Select the preferred payment method. From this screen, you are also able to download and/or send an invoice to the customer with the order information and a payment link. Leveraging manual ordering can also be a great way to track orders in one place without having the customer log the order themselves.

Communication strategy

You need to define a communication strategy for wholesale customers. They depend on you to provide quality products, complete orders, and timely delivery. A communication strategy prepares you for when life throws you unexpected curve balls.

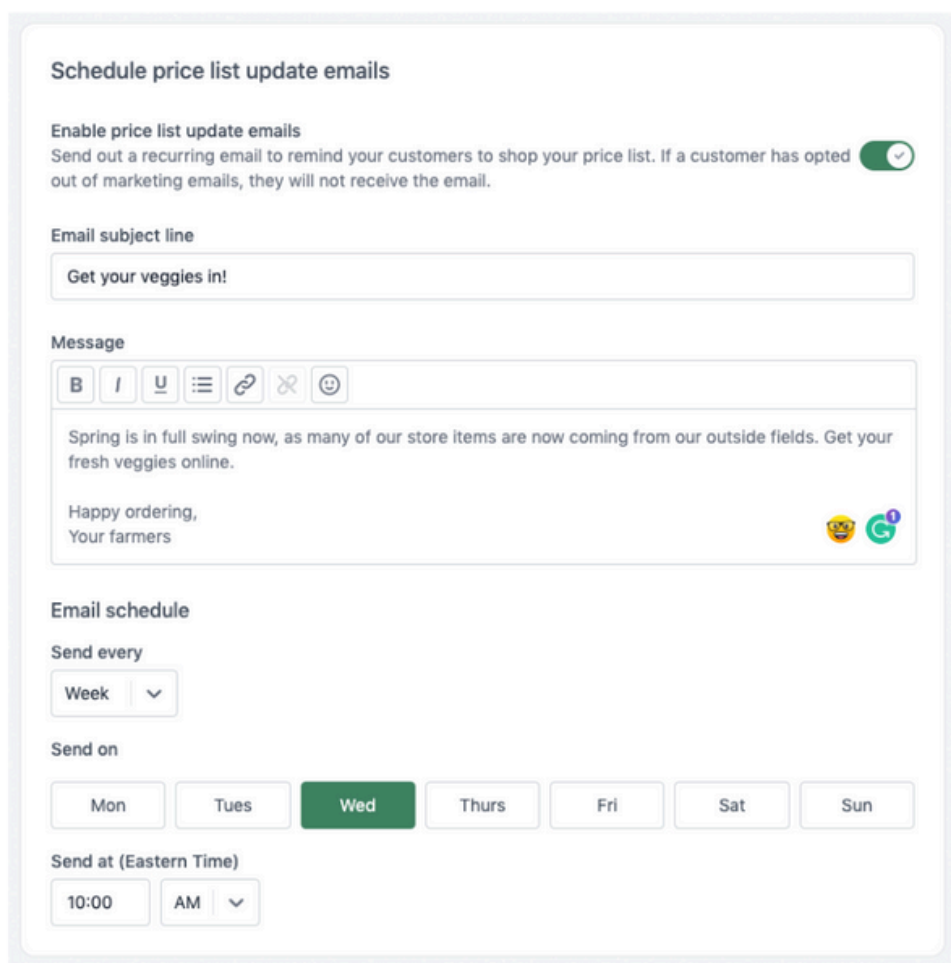
First, define which communication channels work best for your buyers. Some buyers communicate best via email or text. Other buyers might prefer to call.

When first selling to a buyer, start by setting expectations and clarifying your communication availability. Provide one email address and one phone number so that they can reach you.

Don't forget to note what communication strategies are preferred for each customer. As you begin to sell to a variety of wholesale buyers, it's important to record this information. On Local Line, you can keep all your customer information in one place.

You can add their name, business, phone number, email, and business address. You can also add custom tags such as "chef," "grocer," etc. You can filter through customers by tag if you want to send a mass email to all chefs or all your grocery contacts through the platform. You also can add custom notes to a customer profile. Here you can note their preferred communication style.

You can also schedule automated price list emails. A price list schedule is an automated email sent to all the accounts tied to a price list, acting as an automatic order reminder to your customers. You can customize the message and frequency.



Schedule price list update emails



Enable price list update emails
Send out a recurring email to remind your customers to shop your price list. If a customer has opted out of marketing emails, they will not receive the email.

Email subject line
Get your veggies in!

Message

B **I** **U** **☰** **🔗** **✕** **😊**

Spring is in full swing now, as many of our store items are now coming from our outside fields. Get your fresh veggies online.

Happy ordering,
Your farmers  

Email schedule

Send every
Week

Send on

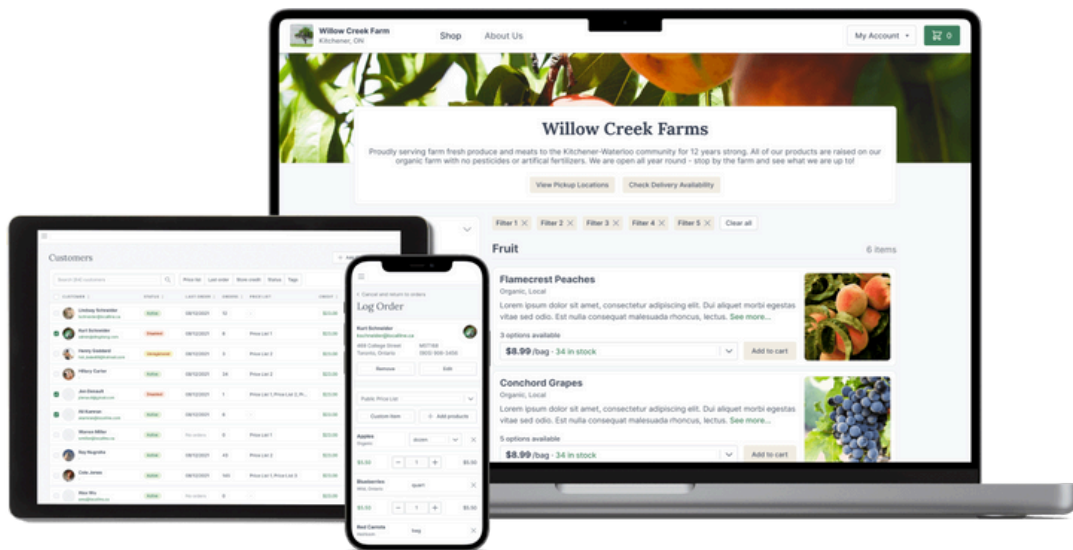
Mon Tues **Wed** Thurs Fri Sat Sun

Send at (Eastern Time)
10:00 AM

These automated emails can be a great way to stay top of mind to your various customers.

Start Selling with Local Line Today!

To support you in your wholesale selling journey, consider [Local Line's all-in-one farm e-commerce platform](#). Local Line is an easy-to-use software tool for farmers to connect with local buyers, such as restaurants, schools, hospitals, and businesses looking to buy wholesale from local farms in their area.



Try selling online with Local Line today. We can get you up and selling online within an hour.

[Sign up here today!](#)

Happy selling!
The Local Line team

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