

CASE STUDY

One system for a wholesaler's orders, pre-orders, invoices and dispatch

A UK wholesale business sells stock to trade customers, including stock that hasn't arrived yet. We built them a single system that takes every sale from order to invoice to dispatch, and keeps stock correct at every step.

CLIENT A UK wholesale business, B2B, VAT-registered	TEAM USING IT 5 people: owners, admins and warehouse
TIMELINE About 3 months, core working in week one	STATUS Live since September 2026, on the client's own systems

The problem

Growing wholesalers often run this side of the business on spreadsheets and email. This business needed four hard things handled properly:

- **Pre-orders.** Selling stock before it arrives, taking a 20% deposit, then collecting the balance once it lands, for every customer.
- **Who gets the stock.** When a batch arrives and several customers are waiting, it has to go out fairly and in the right order.
- **Three invoices per sale.** A proforma, a deposit invoice and a VAT invoice on dispatch, each with correct VAT and matching numbering.
- **Private financials.** Cost prices and profit visible to the owners only, not to admin or warehouse staff.

What we built

An internal web system the whole team works in. Each person logs in and sees what they need to do next.

1. **Orders and pre-orders in one flow.** Create an order in three steps. If anything is short of stock it becomes a pre-order with a 20% deposit automatically, and stock is reserved the

moment an order is confirmed.

- 2. **Invoices that create and send themselves.** A proforma on order, a deposit invoice on pre-order and a VAT invoice on dispatch, sent as PDFs from the client's own email address. Nobody builds an invoice by hand.
- 3. **Fair, automatic stock allocation.** When a new batch is added, it goes to waiting pre-orders strictly first come, first served, and each one converts to a live order once covered.
- 4. **Work queues that tell staff what's next.** The Balance Queue shows pre-orders ready for their balance invoice. The Fulfilment Queue shows paid orders ready to ship: enter a tracking number and the order, stock and VAT invoice are all finalised.
- 5. **Owner-only profit.** Revenue, profit and margin reports for the owners. Staff screens never receive those figures.

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RADIANCE

UK

Dashboard

Inventory

Customers

Orders

Balance Queue

Fulfillment Queue

Invoice

Settings

Orders

11 orders total - 5 active

Payment Review

+ Create Order

Orders

Pre-orders

Active

Confirmed

Proforma Sent

Reminder Sent

Paid

History

Dispatched

Refunded

Void

Q

Search by order ID or customer...

ORDER ID	CUSTOMER	STATUS	NET TOTAL	CREATED	
RAD-11210	Halewood Retail Group CUST0003	Confirmed	£494.10	19 Sept 2026	Edit
RAD-11209	Marlow & Sons Distribution CUST0004	Proforma Sent	£653.76	18 Sept 2026	Edit
RAD-11207	Kestrel Supply Partners CUST0005	Paid	£809.82	17 Sept 2026	Edit
RAD-11206	Halewood Retail Group CUST0003	Paid	£1138.32	16 Sept 2026	Edit
RAD-11208	Bexley Trading Co CUST0002	Reminder Sent	£1398.00	15 Sept 2026	Edit

Every order and exactly where it is in the pipeline.

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Settings

Balance Queue

1 ready for invoice - 1 awaiting stock

Ready for balance invoice

Stock fully reserved — send invoice and collect payment

Bexley Trading Co

RAD-11211

Fairy Non Bio Washing Pods, 38 Washes60 × £9.99

Gross total£719.28

Deposit paid-£143.86

Balance due£575.42

Send Invoice

Waiting for stock

Deposit paid — balance invoice will be available once all items are in stock

Northgate Wholesale Ltd

RAD-11212

Philips Sonicare 4100 Rechargeable Toothbrush0/30

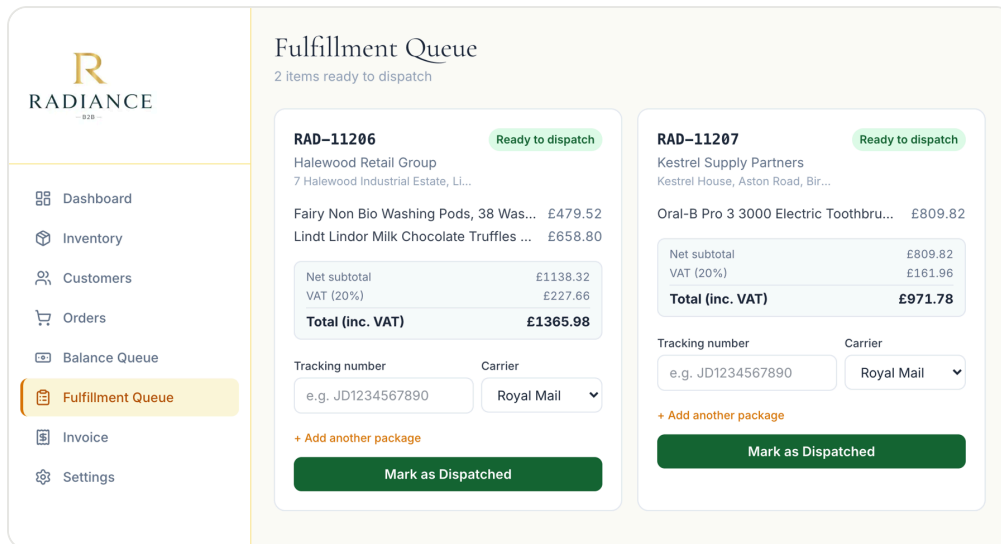
30 still needed

Next batch due: 6 Oct 2026

Order value£2159.64

Deposit paid£431.93

The Balance Queue: pre-orders whose stock has arrived, with the balance worked out and one click to invoice, plus those still waiting and when the next batch is due.



What warehouse staff see when they log in: paid orders ready to go out.

Screenshots use demo data.

Built to be relied on

- Stock is recorded as a ledger of every movement, so it can't quietly drift and you can always see where a unit went.
- Money is calculated in whole pence, so VAT and deposits never pick up rounding errors across the three invoices.
- Automated tests cover the money, stock and permission rules.
- It runs on the client's own accounts and was handed over with clear deploy and rollback steps, so they own it and aren't locked in.

Results

The system went live in September 2026 with the whole team on it. Since launch we've kept improving it based on day-to-day use; the first improvements shipped the day after go-live.

Could your business use something like this?

In a 15-minute call we'll look at how orders move through your business today, and tell you honestly what's worth automating and roughly what it would cost.

Get in touch: Talha Khan, TessentialZ · tessentialz.com