

# Add a Channel Customer

04/30/2025 3:09 pm CDT

## Overview

Adding a [Channel Customer](#) is the first step in the [Channel Invoice Workflow](#).

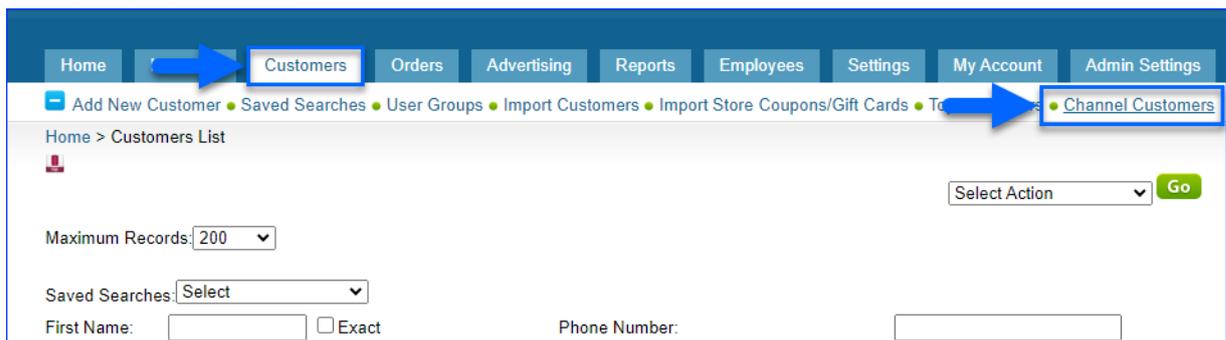
Certain channels do not auto-generate channel invoices, requiring you to invoice them to release the amounts owed. Adding a channel customer lets you [Create a Channel Invoice](#) based on shipped orders in Sellercloud for a specific date range. Then, you can:

- Reconcile the channel's invoice against Sellercloud data
- Send the invoice to the channel for billing purposes
- [Apply](#) the channel's payment to that invoice

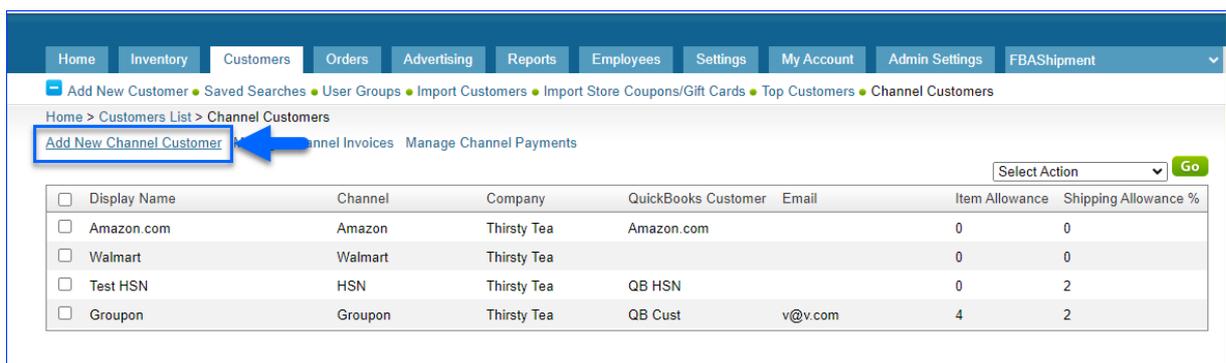
## Add a Channel Customer

To add a channel customer:

1. Go to **Customers**.
2. Select **Channel Customers**.



3. Click **Add New Channel Customer**.



4. Enter the details:

[Add New Customer](#) • [Saved Searches](#) • [User Groups](#) • [Import Customers](#)

Home > Customers List > Channel Customers > Add New Channel Customer

Company: \*

Channel: \*

Display Name: \*

QuickBooks Customer:  ⓘ

Account Number:

Email:

Email CC:

Website:

Payment Term:

Discount Allowance:  \$

Freight Allowance (%):

Include Shipping

- **Company** (Required) – Select the [Company](#).
- **Channel** (Required) – Select the channel. This field only shows channels that are enabled for the selected company.  
You can only have one channel customer for each channel.
- **Display Name** (Required) – Enter the channel’s name.
- **QuickBooks Customer Name** – Enter the name you assigned to the channel customer as their **Customer Name** in QuickBooks.  
This field only appears if the **Enable QuickBooks Workflow** setting in your [Client Settings](#) is enabled.
- **Account Number** – Enter the account number assigned by the channel for the selected company.
- **Email** – Enter the channel’s contact email address.
- **Email CC** – Enter the channel’s additional email contact.
- **Website** – Enter the channel’s website.
- **Payment Term** – Choose a [Payment Term](#) to apply to orders from that channel.
- **Item Allowance** – Enter the amount the channel deducts from what they pay you for each item sale. For channels that don’t auto-generate channel invoices, or if the item allowance fluctuates often, you can enter this when creating each individual channel invoice.
- **Shipping Allowance** – Enter the amount the channel deducts to cover its shipping costs. If the channel pays for shipping, leave this blank.
- **Include Shipping** – Check to see a **Shipping Total** line on the channel invoice (not applicable for Groupon).  
This is unrelated to the **Shipping Allowance**.

5. Click **Save**. You can now [Create a Channel Invoice](#) for the channel customer.

# Manage Channel Customers

To copy your channel customers to other companies or delete them:

1. Go to **Customers**.
2. Select **Channel Customers**.
3. Check the boxes to the left of one or more channel customers.
4. Click **Select Action** and select:
  - **Copy to Other Company**
  - **Delete**
5. Click **Go**.

Home > Customers List > Channel Customers

Add New Channel Customer Manage Channel Invoices Manage Channel Payments

<input type="checkbox"/>	Display Name	Channel	Company	QuickBooks Customer	Email	Team A	Team B
<input type="checkbox"/>	Local Store	Local_Store	Thirsty Tea			0	0
<input checked="" type="checkbox"/>	Amazon.com	Amazon	Thirsty Tea	Amazon.com		0	0
<input checked="" type="checkbox"/>	Walmart	Walmart	Thirsty Tea			0	0
<input type="checkbox"/>	Test HSN	HSN	Thirsty Tea	QB HSN		0	2
<input type="checkbox"/>	Groupon	Groupon	Thirsty Tea	QB Cust		4	2

Select Action  
Select Action  
Copy to Other Company  
Delete

Go