Add a Channel Customer

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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
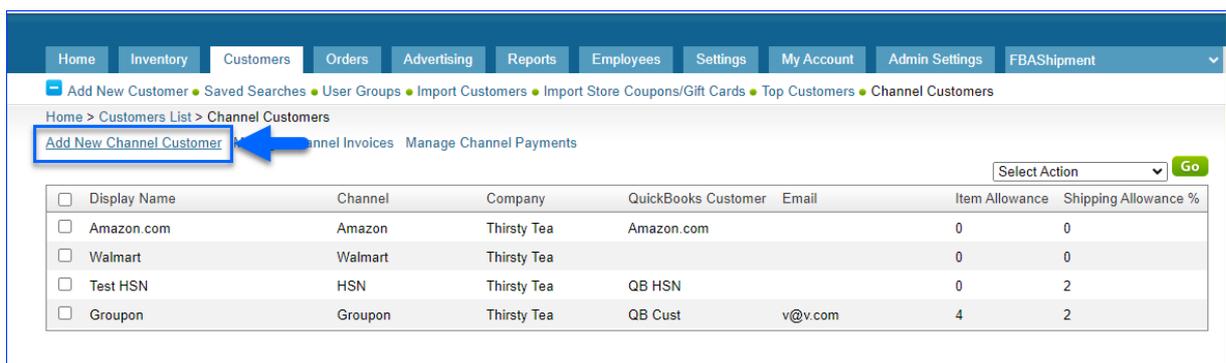- Apply the channel's payment to that invoice

Add a Channel Customer

To add a channel customer:

1. Go to **Customers**.

2. Select **Channel Customers**.
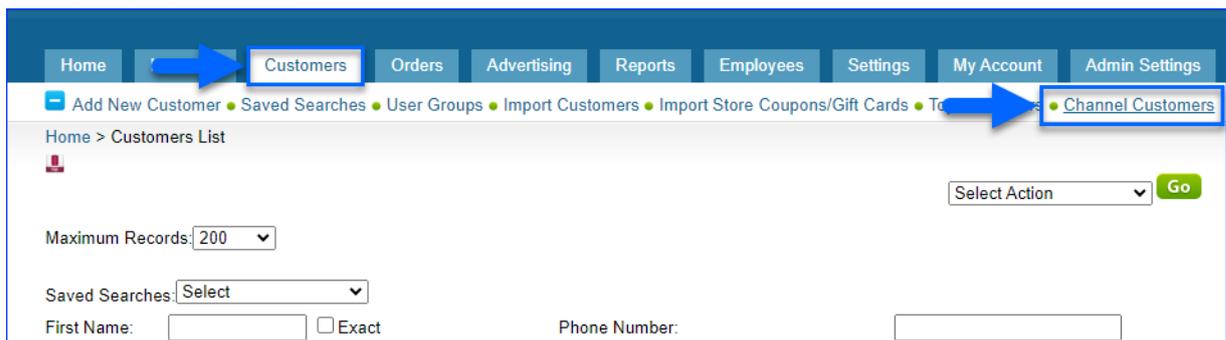
3. Click **Add New Channel Customer**.

4. Enter the details:

- **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**.