**Customer name**

Name all your customers (retailers). All customer names needs to be unique (note: if you integrate towards an ERP system be certain that the customer names match).

**Customer number**

Fill in customer numbers for your customers. If you already have a structure for customer numbers follow this. Customer numbers and customer names should be unique for all customers as these tie the customer info for each customer together.

**Billing email** (*optional*)

The billing email receives all order emails and invoices for a customer regardless of who placed the order.

**Invite buyer: first name** (*optional*)

Put in a name for the specific customer’s user. It is possible to invite multiple users from the Traede platform after import and it is as well possible for the retailer themselves to add more users.

**Invite buyer: email** (*optional - but mandatory if* **Invite buyer: first name** *is filled out*)

Type in the email that should be connected with the retailer’s user.

**VAT number** (*optional*)

Fill in VAT number (not VAT percentage) for your customers.

**Address title**

Give a title to the customer’s address. It can be that you wish to name it after the customer itself or maybe naming it “Delivery address”, “Invoicing address”, etc..

**Address name**

Name the shop e.g. Traede retailer - this will be showed on the address label.

**Address**

Address is the specific street address e.g. Tomsgårdsvej 19. Also remember to put in any floor, door or apartment labels.

NOTE: Be sure of explanation given under **Address title** as this applies here as well.

**Telephone** (*optional*)

If needed be then put in a telephone number for the customer. A word of advice: Remember country codes.

NOTE: Be sure of explanation given under **Address name** as this applies here as well.

**City**

Here you fill in the city related to the specific customer address.

NOTE: Be sure of explanation given under **Address name** as this applies here as well.

**Zip code**

And you also need to type in the zip code.

NOTE: Be sure of explanation given under **Address name** as this applies here as well.

**Country**

And lastly, remember to fill in the country following the ISO 3166-ALPHA-2 structure. I.e. a two character structure for country codes like: DK, DE, HK, UK, etc.

NOTE: Be sure of explanation given under **Address name** as this applies here as well.

**Agent name** (*optional*)

If you use agents and wish to assign an agent to the customer you can put in the agent’s name here. It doesn’t have to be the agents actual name but just whatever you want the agent to be named as in Traede.

NOTE: Only one agent can be assigned to a customer at a time.

**Agent email** (*optional - but mandatory if* **Agent Name** *is filled out*)

If you have filled in an agent name remember to fill in the agent’s email address as well so as to actually have assigned the agent to the customer.

**VAT rate**

This field is the VAT rate in % and it needs to be filled in no matter what but don’t put the “%” after the number. If the customer should not have VAT put in 0. Otherwise just put in the correct VAT percentage e.g. 25% for Danish customers if you sell from and to Denmark.

**Allowed currencies** (*optional*)

If you wish to specify one or more currencies that the customer are allowed to purchase in from your webshop then this is where you determine that. Only currencies written as DKK, SEK, USD, etc. will work. You can also add a minimum buying amount for that customer. Then you will fill it out by following this structure:
[CURRENCY:MINIMUM BUYING AMOUNT], e.g. DKK:2000

If no currencies are determined then the customer will be able to purchase in all available currencies.

NOTE: Should you want to add more than one currency in the import sheet then use “**,**” (comma) as a separator and no spaces in between values.

*NB! If you use e-conomic as well, you must fill out the following four columns (payment term name, payment term description, payment term type, payment term modifier)* **Payment term name** (*optional*)

If you wish to assign a specific payment term to the customer then define the name of the payment term here. The name can be that of an existing payment term in Traede or of a new payment term you want to create.

If no payment term is assigned to a customer then the *Default Payment Term* from the *Sales Settings* in Traede will automatically be added to all orders.

**Payment term description** (*optional - but mandatory if* **Payment term name** *is filled out*)

Here you can put in a description of the payment term. It won’t show anywhere so in case it is not that important to you then simply copy + paste the **Payment term name**

**Payment term type (invoice\_month, net, paid\_cash, prepaid)** (*optional - but mandatory if* **Payment term name** *is filled out*)

Payment term type has to be filled out with one of the four pre-determined types stated in the column header (i.e. invoice\_month, net, paid\_cash, prepaid).

**Payment term modifier** (*optional - but mandatory if* **Payment term name** *is filled out*)

Payment term modifier is the credit days and it needs to be filled out if you have decided to assign a payment term and the value for credit days can be anything from 0 and up. For paid\_cash and prepaid just put in value 0 and for invoice\_month and net put in the relevant number of days.

**Bank account description** (*optional*)

Only relevant if you invoice through Traede.

If you want to assign a specific bank account to a customer you need to make a description of the account. It’s up to you what you want to have stated here but it could be something like “Bank account for Danish customers - DKK”.

**Bank account “Bank Name”** (*optional - but mandatory if* **Bank account description** *is filled out*)

Put in the name of the bank the bank account belongs to.

**Bank account “Bank code”** (*optional - but mandatory if* **Bank account description** *is filled out*)

Every bank branch has a bank code. Put in the specific bank code of the bank that has the bank account. E.g. in Denmark every bank has a 4-digit bank code called Registreringsnummer.

**Bank account “Account number”** (*optional - but mandatory if* **Bank account description** *is filled out*)

Fill in the account number for the specific bank account.

**Bank account “IBAN”** (*optional - but mandatory if* **Bank account description** *is filled out*)

Type in the IBAN number of the bank account. An IBAN consists of up to 34 alphanumeric characters and are country and bank account specific.

**Bank account “SWIFT”** (*optional - but mandatory if* **Bank account description** *is filled out*)

Lastly fill in the SWIFT number (also referred to as SWIFT CODE or SWIFTBIC). This is a code that helps overseas banks identify which bank to transfer money to.

**Discount %** (*optional*)

If the customer should have a set discount on all orders type in the discount percentage here using only digits - no percentage “%” symbol.

You can always edit discount percentage or line discount on specific orders.

**Notes** (*optional*)

If there is anything you feel should be noted about this customer then state it in this field. It will be shown on the customer in Traede but not be visible to the customer.