

CSV Column Header Name	Sample Value 1	Sample Value 2	Comments
Account #	10001001	10001002	Can leave blank if numbering is system generated.
Account Name	Demo customer 1	Demo customer 2	Customer legal name to bill on the invoice
Language	EN	EN	EN = English, FR = French
Category	Commercial	Commercial	Type of customer; ex. "Residential"; "Commercial"; "Non-profit"
Phone	4165551212	4165661213	Customer's phone number
Ext			Customer's phone extension
Fax			
Email	test@test.com	test@test.com	Customer's email address. Note: This field is *required* if using an email-related invoice delivery method
Status	Active	Active	Account status. If an account is not active, it will not be included during the bill run / bill generation process
Currency	Canadian Dollar	Canadian Dollar	Currency for the account. Do not use the currency code.
Parent Account			Name or account # of any parent account, if any
Assigned To			Username of smartbilling user assigned to review this account
Assigned Department			Name of department managing this account
Billed From	Acme Incorporated	Acme Incorporated	The DBA or Company Name from which the invoice information will be derived and the invoice billed from. This needs to be a valid "Company" in smartbilling.
External Id			Optional reference field
Billing Cycle	1st of Period	1st of Period	The billing cycle data when the customer is to be billed. When a bill run is created, this customer's subscriptions will be included if the Customer.Billing Cycle matches the Bill Run.Billing Cycle value.
Invoicing Start Date	1/1/2022	1/1/2022	Use date format MM-DD-YYYY. The default date to use when creating a new subscription for this account.
Security Deposit			
Invoice Run Terms	30 days	30 days	Payment terms (in days) to apply to automatically generated invoices for this account
Manual Invoice Terms	30 days	30 days	Payment terms (in days) to apply to manually created invoices for this account
Invoice Delivery Method	Email Attachment	Email Link	Valid options are: Email Attachment, Email Link, or Mail
Send Notifications	0	0	Whether to send late payment notifications or not. 0 = No, 1 = Yes
Invoice Late Fee	0	0	Whether to apply late fees or not. 0 = No, 1 = Yes
Usage File Group			Name of usage file group, if applicable. A usage file group is a group of accounts that are configured to receive detailed usage files in zip format. The groups are defined in the "Export Groups" configuration

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Invoice PO #			Reference field to add a PO# from the customer that covers this invoice
G/L Account			Optional field. Valid values are defined in the "G/L Accounts" configuration
Late Payment Fee Annual %	0.2		Percentage value used to calculate late payment fees. For example, 20% = 0.20
Late Payment fee Compounded	0	0	
Invoicing Group			Name of invoicing group, if applicable. An invoicing group is used to make it easier create invoice runs for particular sets of customer accounts. The groups are defined in the "Invoicing Group" configuration
Commission Plan			Name of commission plan, if applicable. An commission plan is used to allocate revenue from this customer account to a particular sales agent. The commission plans are defined with the Sales module.
Send copy of invoice to parent account	0	0	0 = No, 1 = Yes. If yes, the invoice for this account will also be emailed to the parent account email address. Note: this only works if there is a parent-child account relationship
Invoice Template			Leave blank for Default, else if available, the name of the custom invoice template to use
Location - Address Name	Billing Address	Billing Address	Use "Billing Address" to define the main account address. Use location.csv to add different addresses
Location - Attention To	J Doe 1	J Doe 2	
Location - Address Line 1	123 Main St.	Danyla Shcherbakivskoho St 51	
Location - Address Line 2			
Location - State	Ontario	Ajaria	
Location - City	Toronto	Ajaria	
Location - Postal / Zip	M3H1F5	2000	
Country	Canada	Georgia	
Location - Housing		99A	Used for some EU countries
Location - District		Sviatoshyn	Used for some EU countries
Location - Building		5	Used for some EU countries
Location - Apartment		102	Used for some EU countries
Location - Street Name		Danyla Shcherbakivskoho St	Used for some EU countries
Contact - Title			
Contact - Prefix			

CSV Column Header Name	Sample Value 1	Sample Value 2	Comments
Contact - First Name			
Contact - Middle Name			
Contact - Last Name			
Contact - Work Phone			
Contact - Work Ext			
Contact - Mobile Phone			
Contact - Other Phone			
Contact - Email			