

Customer and Vendor Data Fields in Invoice CSV Templates

Customer Data Fields Example

FIELD NAME	DESCRIPTION	EXAMPLE VALUE
CustomerName	Full legal name of the customer	John Doe Ltd.
CustomerEmail	Primary contact email	john@doeltd.com
CustomerAddress	Billing address (street, city, etc.)	123 Lakeview Rd, Seattle, WA
CustomerPhone	Contact phone number	+1 555 123 0001
CustomerTaxID	Tax identification number	98-7654321
CustomerID	Internal customer code or reference	CUST-10458

Vendor Data Fields Example

FIELD NAME	DESCRIPTION	EXAMPLE VALUE
VendorName	Full legal name of the vendor	Acme Supplies Inc.
VendorEmail	Main contact email	accounts@acmesupplies.com
VendorAddress	Business address	45 Commerce St, New York, NY
VendorPhone	Contact phone	+1 212 555 1020
VendorTaxID	Vendor's tax number	11-2233445
VendorID	Internal reference or code	VEND-30210
BankAccount	Main payout bank account number	9876543210

Important Notes

- All field names and their order must match the system requirements for successful imports.
- Check for required fields—missing required data may cause invoice processing errors.
- Ensure proper formatting of emails, phone numbers, and tax IDs.
- Sensitive data such as Tax IDs and Bank Accounts must be kept secure and compliant with data privacy laws.
- Regularly verify vendor and customer information to avoid issues in billing and payment processes.