

CSV Guide

Uploading your partner account sheets will allow you to take advantage of PartnerTap mapping technology and find accounts that align with your partner.

Required Fields:

ACCOUNT NAME	Name of the account
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Recommended fields:

DUNS	Data Universal Numbering System
WEBSITE	www.companyurl.com
STATE	State of the billing account
PHONE	The phone number on the account
TAX_ID	Tax identification number for the account (e.g. VAT, EIN, GST)
COUNTRY	Include the country of the account for best results when using TAX_ID column

Optional fields:

TYPE	Account Type e.g. client/prospect
STREET	Street address of the account
CITY	City of the account
ZIP	Zip or postal code of the account
STATE	State address of the account
COUNTRY	Country of the account
PHONE	The phone number on the account
OWNERNAME	Name of the account owner
OWNEREMAIL	Email address of the account owner
OWNERTITLE	Job title of the account owner
OWNERDIVISION	Organizational division of the account owner

Technical Notes:

1. Wrap all fields in double quotes (").
2. Recommended fields will greatly improve account mapping with your partners.
3. Whenever available, include the optional fields in your CSV file for optimal mapping accuracy.
4. The more data you provide, the more valuable your mapping will be!