

Opportunity CSV Upload Guide

PartnerTap makes it easy to upload opportunity data via a CSV file. This guide walks you through preparation steps to make your opportunity upload successful.

CSV File Upload Best Practices

1. [Save the file as a CSV](#).
2. Save multi-tab workbooks as single-tab CSV files. PartnerTap cannot upload multi-tab workbooks.
3. Make sure every column with data has a header name.
4. Include the 7 required columns:
 - a. **Account ID**
 - b. **Opportunity Name**
 - c. **Opportunity ID**
 - d. **Stage**
 - e. **Opportunity Created Date**
 - f. **Is Won**
 - g. **Is Closed**
5. Review the [Recommended Columns](#) list below and include as many of these as columns as possible.
6. You may include any additional custom opportunity fields you want in PartnerTap.
7. Delete the 10-15 columns following the last column with data to remove cells that may have random values and could cause uploading errors.

Required Fields

PartnerTap allows you to get started with basic opportunity data information.

WHY DATA IS NEEDED	COLUMN	DATA DESCRIPTION
Required data to bring the opportunities into PartnerTap	ACCOUNT ID	Unique account ID
	OPPORTUNITY NAME	Name of the opportunity
	OPPORTUNITY ID	Unique opportunity ID
	STAGE	Opportunity stage field
	OPP CREATED DATE	Date opportunity was created
	IS WON	Opportunity was won
	IS CLOSED	Opportunity is closed

Recommended Columns

WHY DATA IS NEEDED	COLUMN	DATA DESCRIPTION
Informational only	ACCOUNT NAME	Name of the account
Additional fields that are frequently used to build ultra-targeted reports and action lists for co-sell automation	OPPORTUNITY TYPE	Type of opportunity (New, Expansion)
	AMOUNT	Value of opportunity
	PROBABILITY	Likelihood of closing opportunity
	EXPECTED REVENUE	Expected revenue from opportunity
	CLOSED DATE	Date opportunity closed
Contact information needed to enable the co-sell automation process of connecting reps directly together	OPPORTUNITY OWNER NAME	Name of account owner
	OPPORTUNITY OWNER EMAIL	Email address of opportunity owner
	OPPORTUNITY OWNER TITLE	Job title of opportunity owner
	OPPORTUNITY OWNER PHONE	Phone number of opportunity owner
	OPPORTUNITY OWNER USER ID	CRM User ID of opportunity owner
Additional optional fields	LAST MODIFIED DATE	Date opportunity was last modified
	LAST MODIFIED BY USER NAME	User that modified opportunity
	LAST MODIFIED BY USER EMAIL	Email of user that modified opportunity
	LAST MODIFIED BY USER ID	User ID of user that modified opportunity

How to save an excel file as a CSV

For PC users

1. Click File > Save As
2. Selection location to save file to
3. Under File Type drop down select > CSV (Comma delimited) (*.csv)

For Mac users

1. Click File > Save As
2. Select the location to save the file to
3. Under the File Format drop-down menu, select > CSV (Comma delimited) (*.csv)