The data fields required in CSV are:

**Partner Name:** the name of the partner associated with the group

**Subscription Name:** the name of the family/billing group. Generally, this is just the name of one of the members of the group. This can be changed in the dashboard

**Is Billing Entity:** This is a YES/NO field. Which of the members of this group should get the offer and hence is the billing entity. This is not critical. Lots of clients give us the CSV without choosing one, as the dashboard allows you to choose this very easily.

**Entity Email Address**: The email address for the member of the group. It is critical that at least one member of the group has an email address and then this can be chosen by you as the billing entity. The more emails the better. Having said that if a group has no email addresses at all it is not a deal-breaker, as you can print the Audit Safe offer out for them and send in the mail but you don't want to do this more than a handful of times.

**Entity ID.** This is the Unique ID that pinpoints that entity in your system.

**Entity Code:** This can be the same as the Entity ID or another unique number. Systems are different

With regard to the above, we need at least one of the above numbers to be unique. It doesn't really matter what your system calls it, as long as we can have a unique number/field associated with the entity.

**Entity Name:** the name of the member/entity of the group or the client name etc

Also, please remember you should provide the CSV data in such a way that the SMSFs are not members of any groups as SMSFs need to have separate offers made and take the payment from a different account. While you are able to do this through the dashboard it will be much easier if the CSV already had the SMSFs segregated