

Create a New Account List

Create and upload a list of organization and domain names to target these key accounts with personalized campaigns.



Note

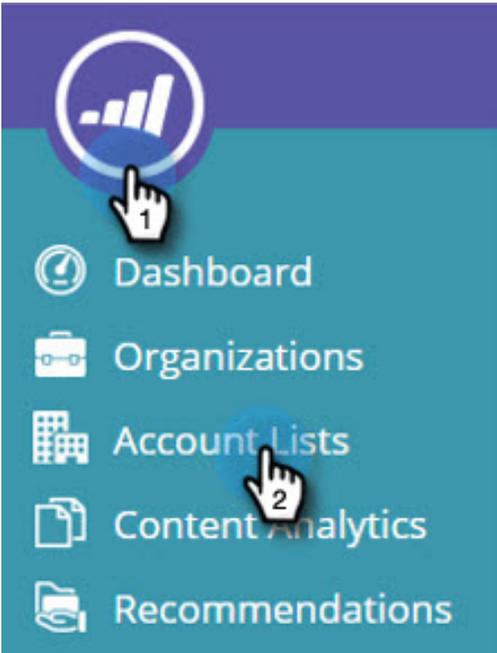
This article applies legacy Web ABM customers only. If you acquired Web ABM after September of 2016, please follow the steps in [this article](#) instead.

What's in this article?

- [Create a New Account List](#)
- [Edit an Account List](#)
- [Delete a Named Account List](#)

Create a New Account List

1. Go to **Account Lists**.



2. Select **Create New**.

CREATE NEW Search 

Account List	Source	Named Accounts	Date Created	Status	
ABM-Lookup-List-name-domain	ABM-Lookup-List-name-domain.csv	999	26-07-16 00:28:10	Pending	 
ABM-Lookup-List-name-domain...	ABM-Lookup-List-name-domain-location.csv	999	26-07-16 00:26:40	Pending	 
ABM-Segments-Planning-4	ABM-Segments-Planning-4.csv	1003	22-02-16 07:01:32	Deleted	 
country-state	country-state.csv	15	08-01-16 02:50:29	Active	 
dotan-abm-test-01	country-state-20160413.csv	15	14-04-16 00:51:55	Active	 
mic_test10	Microsoft-ENT-Account-List1.csv	30691	25-01-16 22:48:47	Active	 
mic_test11	Microsoft-ENT-Account-List1.csv	30691	25-01-16 23:36:26	Active	 

3. Select **Browse** and upload your CSV file (Make sure the csv file meets the criteria). Add a **Name** and **Description**. Click **Save**.



Create Account List

Upload File

BROWSE... 

File Details

File Name	Number Of Named Accounts

List Name 

Top 150 Strategic Account

Description 

Top 150 high-yield strategic accounts

- File must be in CSV format with UTF-8 encoding. ([View example](#) / [Download file template](#))
- File cannot exceed 10MB.
- File must include only 4 header columns - Column A: Name, Column B: Domain, Column C: Country, Column D: State.
- File uploaded can take up to 2 business days before approval.
- You will receive an approval email notification or check state of file in Account List page.

CANCEL
SAVE 



Note

What is the format for the CSV File?

Make sure the named account CSV file meets the following requirements:

- Saved as a CSV format
- Does not exceed 10MB
- Only 4 columns with the header Column A: Name, Column B: Domain, Column C: Country, Column D: US State.
- File uploaded can take up to 2 business days before approval.
- You will receive an approval email notification or check state of file in Named Accounts page.
- The total number of records/rows accumulated for all your lists uploaded starts at 10K, with the largest package totalling 100K.



Example

Example of the CSV file

- Row 1 Column A value = Organization
- Row 1 Column B value = Domain
- Row 1 Column C value = Country
- Row 1 Column D value = US State
- One of the column values is mandatory. However, providing both Organization and Domain names improves the match rates of the Account List.
- Country and State are optional values.
 - For country name, use full country name or abbreviation code. Eg. United States or US.
 - For a U.S. State, use the 2-letter abbreviation code, i.e. CA. Only U.S. states are recognized.

	A	B	C	D
1	Name	Domain	Country	State
2	Walmart	www.walmart.com	US	AZ
3	Exxon Mobil	exxonmobil.com	United States	CA
4	Berkshire Hathaway	www.berkshirehathaway.com/	USA	CT
5	Chevron	http://www.chevron.com	United Kingdom	
6	Deutsche Bank	db.com	DE	
7	Phillips 66	www.phillips66.com	USA	
8		gm.com	US	
9		ford.com		
10		ge.com		

Edit an Account List

On the **Account Lists** page, click the **Edit** icon on the list.

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ABM-Segments-Planning-4	ABM-Segments-Planning-4.csv	1003	22-02-16 07:01:32	Deleted	 
country-state	country-state.csv	15	08-01-16 02:50:29	Active	 
dotan-abm-test-01	country-state-20160413.csv	15	14-04-16 00:51:55	Active	 
mic_test10	Microsoft-ENT-Account-List1.csv	30691	25-01-16 22:48:47	Active	 
mic_test11	Microsoft-ENT-Account-List1.csv	30691	25-01-16 23:36:26	Active	 

Select **Browse** and upload your new CSV file. This file will replace the original file. Click **Save**. The new uploaded file will be in a pending state until approved by Marketo Support, when in a pending state the original file will remain active.



Set Account List

Upload File

BROWSE... [country-state.csv](#)

File Details

File Name	Number Of Named Accounts
country-state	

List Name

Description

- The CSV file will replace the existing file. The existing list will remain active until the processing of the new file is complete.
- File processing can take up to 2 business days to approve.
- File must be in CSV format with UTF-8 encoding. ([View example / Download file template](#))
- File cannot exceed 10MB.
- File must include only 4 header columns - Column A: Name, Column B: Domain, Column C: Country, Column D: State.
- You will receive an approval email notification or check state of file in Account List page.

CANCEL
SAVE

The CSV file will replace the existing file. The existing list will remain active until the processing of the new file is complete.

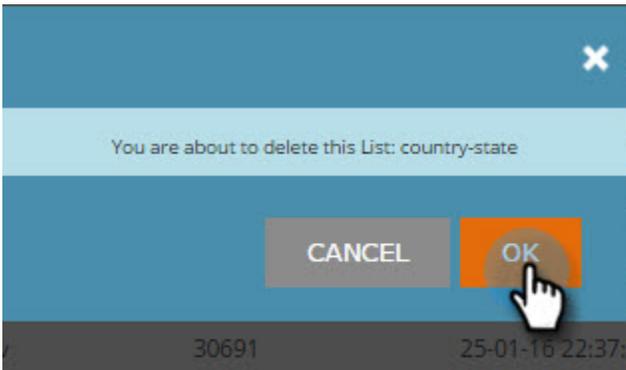
Delete a Named Account List

1. On the **Account Lists** page, click the **Delete** icon of the list you wish to delete.

CREATE NEW Search 

Account List	Source	Named Accounts	Date Created	Status	
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2. A message appears to confirm if you want to delete the list. Click **OK**.



Related Articles

- [Create a Segment Using an Account List](#)
- [View a Named Account List](#)

