

# Customer Attributes Dataset Details Page



This content is only for clients with the one-click **DATASETS** option in the top navigation bar. If you click **DATASETS** and see **Product Data** and **Customer Data** listed as menu options, then this content doesn't apply to your account. Instead, see [Customer Dataset Details Page](#).

You can view key information about a Customer Attributes dataset that you have uploaded to the platform both on the [Datasets list page](#) and on a dataset's details page. To access a Customer Attributes dataset's details page, click **DATASETS** in the top navigation, select **Customer Attributes** from **View**, and then click the name of the dataset.

## Datasets

### Customer Attributes

[CREATE DATASET](#)

NAME	UNIQUE ID	IDENTIFIER NAME ⓘ	EXPERIENCE USAGE	LAST UPDATED	UPLOAD
<a href="#">HighValueWithLocation</a> CUSTOMER ATTRIBUTE	customer_id	VIP	0 active 1 inactive	9 MONTHS AGO	
<a href="#">VIP_Members_2020</a> CUSTOMER ATTRIBUTE	customerId	VIP	0 active 0 inactive	13 DAYS AGO	
<a href="#">AgilOne</a> CUSTOMER ATTRIBUTE	customer_id	AdId	0 active 0 inactive	10 MONTHS AGO	

## Attributes Tab

The default view of a dataset's details page is the **Attributes** tab. Displayed here are all the attributes in the dataset.

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# VIP\_Members\_2020

[↑ UPLOAD DATA](#)

**Attributes** | [Update History](#) ✓ [LAST UPDATED A DAY AGO](#) | Rows: -

Identifier Name: VIP [✎](#) [+ ADD ATTRIBUTE](#)

Name	Unique ID	Data Type	Experience Usage	
› Rewards_Enrolled		STRING	0 active	0 inactive
› Lifecycle_State		STRING	0 active	0 inactive
› Lifetime_Product_Sales		STRING	0 active	0 inactive
› Engagement_State		STRING	0 active	0 inactive
› customerId	✓	STRING	0 active	0 inactive

Click the name of any attribute listed to see the following information about it:

- **Format:** The data type selected, which can only be **STRING**, **NUMBER**, **BOOLEAN**, or **DATE**
- **Can target by:** The operators you can use when including this attribute in a filter, such as **Has value**, **Equal to**, or **Starts with**
- **Active Experiences:** The name of any active experience, if any, in which the attribute is employed, with the name serving as a link to that specific experience
- **Inactive & Expired Experiences:** The name of any inactive or expired experience, if any, in which the attribute was employed, with the name serving as a link to that specific experience

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# VIP\_Members\_2020

[↑ UPLOAD DATA](#)

**Attributes** | [Update History](#) ✓ [LAST UPDATED 4 DAYS AGO](#) | Rows: -

Identifier Name: VIP\_members [✎](#) [+ ADD ATTRIBUTE](#)

Name	Unique ID	Data Type	Experience Usage	
▼ Rewards_Enrolled		STRING	0 active	0 inactive
Format: <b>STRING</b>   Can target by: <b>HAS VALUE</b> <b>EQUAL TO</b> <b>CONTAINS</b> <b>STARTS WITH</b> <b>ENDS WITH</b>				
Active Experiences		Inactive & Expired Experiences		
There are currently no experiences for this attribute.		There are currently no experiences for this attribute.		
› Lifecycle_State		STRING	0 active	0 inactive

See [Using the Add Attribute Modal in Update a Customer Attributes Dataset](#) for more information about adding attributes from the dataset's details page.

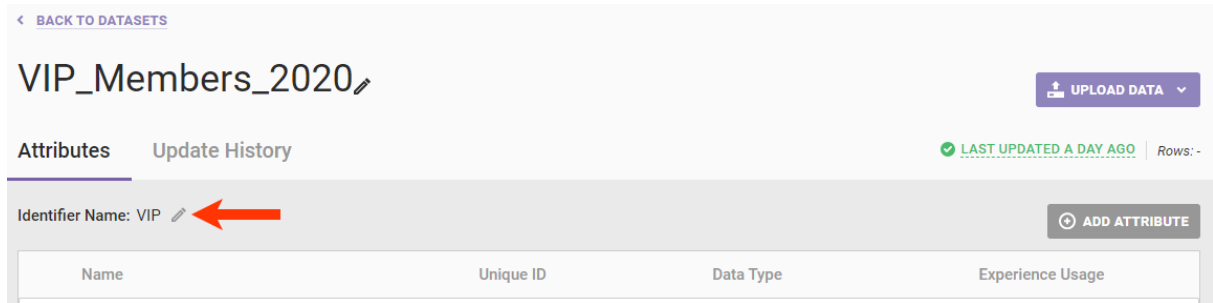
# Setting an Identifier Name

From the **Attributes** tab you can create an Identifier Name for the attribute or select an existing one.

 You cannot use a Customer Attributes dataset in an experience until it has an Identifier Name.

Follow these steps to add or change a dataset's Identifier Name.

1. Click the pencil icon that appears next to **No Identifier Name** or the existing Identifier Name.




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## VIP\_Members\_2020

Attributes Update History

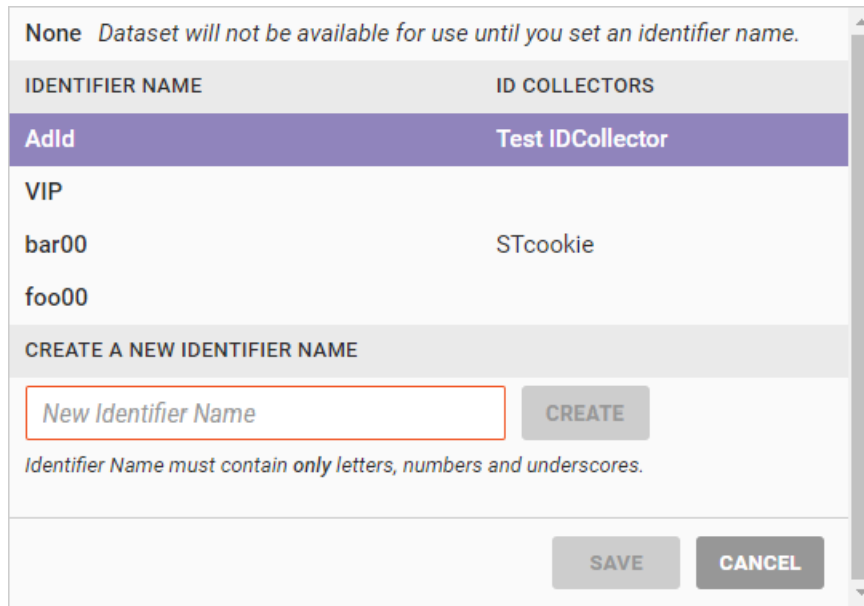
LAST UPDATED A DAY AGO Rows: -

Identifier Name: VIP 

ADD ATTRIBUTE

Name	Unique ID	Data Type	Experience Usage
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2. Take one of the following actions:
  - o Select an existing Identifier Name from the list.



None Dataset will not be available for use until you set an identifier name.

IDENTIFIER NAME	ID COLLECTORS
AdId	Test IDCollector
VIP	
bar00	STcookie
foo00	


CREATE A NEW IDENTIFIER NAME

CREATE

Identifier Name must contain only letters, numbers and underscores.

SAVE CANCEL

- o Type a new Identifier Name into **CREATE A NEW IDENTIFIER NAME** and then click **CREATE**.

 You can only use letters, numerals, and underscores in an Identifier Name.

None Dataset will not be available for use until you set an identifier name.

IDENTIFIER NAME	ID COLLECTORS
AdId	Test IDCollector
VIP	
bar00	STcookie
foo00	

CREATE A NEW IDENTIFIER NAME

Identifier Name must contain *only* letters, numbers and underscores.

3. Click **SAVE**.

VIP\_Members\_2020

Attributes Update History ✔ LAST UPDATED 4 DAYS AGO | Rows: -

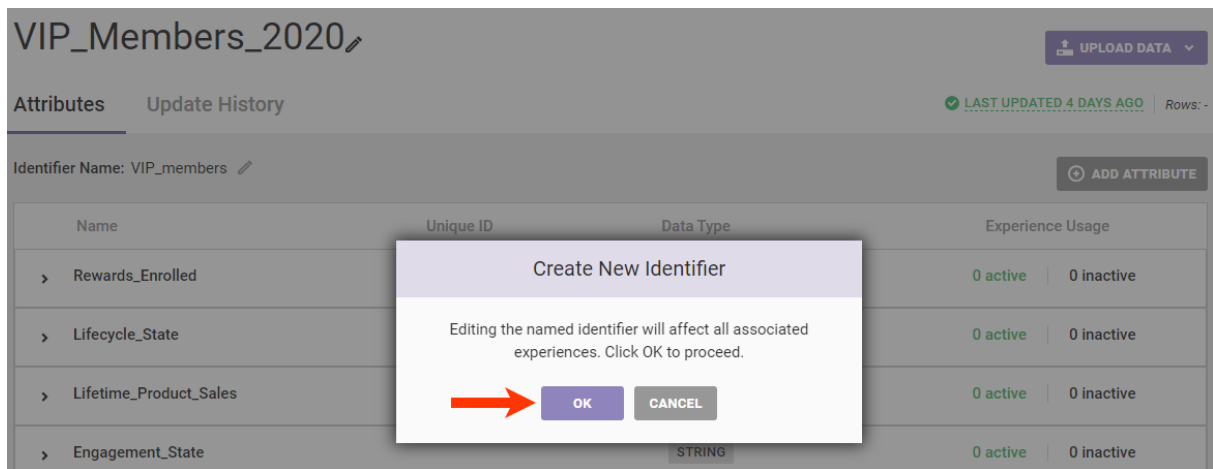
Identifier Name: VIP\_members

Name	IDENTIFIER NAME	ID COLLECTORS	Data Type	Experience Usage
	AdId	Test IDCollector	STRING	0 active   0 inactive
> Rewards	VIP		STRING	0 active   0 inactive
> Lifecycle	barfoo	stevetest cookie	STRING	0 active   0 inactive
> Lifetime	foobar		STRING	0 active   0 inactive
> Engagem			STRING	0 active   0 inactive
> custom			STRING	0 active   0 inactive

CREATE A NEW IDENTIFIER NAME

Identifier Name must contain *only* letters, numbers and underscores.

4. Click **OK** in the Create New Identifier modal.

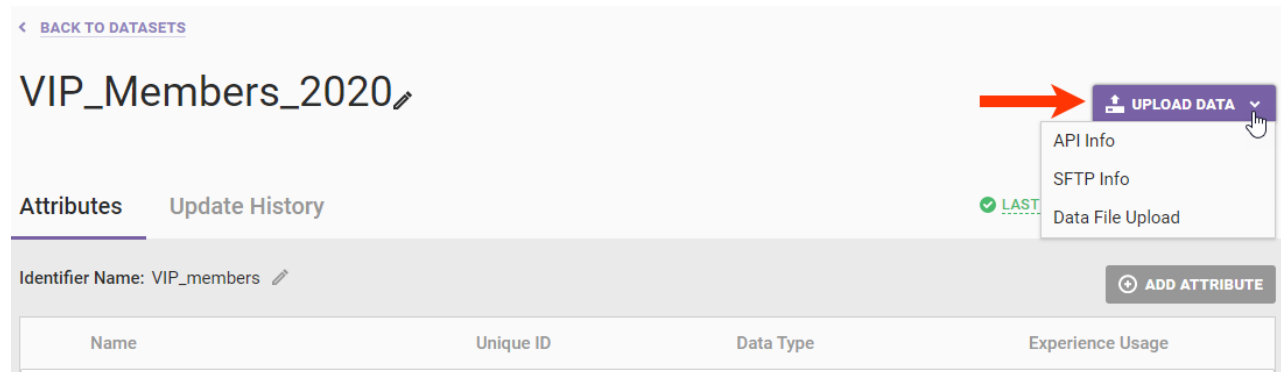


If you create a new Identifier Name, it then becomes available for use with other Customer Attributes datasets.

## Uploading Data

Clicking **UPLOAD DATA** on the far-right side of the details page presents three options:

- **API Info:** Review key details about the account's API configuration for updating the dataset
- **SFTP Info:** Review key details about the account's SFTP configuration for updating the dataset
- **Data File Upload:** Access the Upload Data wizard either to update select rows through a partial update or to replace the entire dataset through a full update



See [Update a Customer Attributes Dataset via the Data API](#) for more information about this dataset update option. Refer to [Update a Customer Attributes Dataset via SFTP](#) for additional guidance on the SFTP option. For assistance with the Upload Data wizard, review the information in [Update a Customer Attributes Dataset](#).

## Update History Tab

The table on the **Update History** tab contains information about each successful and failed update for the dataset.

- **UPLOAD DATE:** The number of days, months, or years elapsed since the specific file was uploaded; the exact date and time appears in a pop-up on hover
- **FILENAME:** The name of the CSV or TSV file uploaded to the platform

- **SOURCE:** How the file was uploaded to the platform, which can only be **WIZARD**, **S3**, or **SFTP** since the table doesn't include updates sent via the Data API
- **USER:** The username associated with the upload action
- **UPDATE TYPE:** The type of update submitted, **Initial Upload**, **Full**, or **Partial**
- **ROW COUNT:** The number of rows contains with the file

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## VIP\_Members\_2020

UPLOAD DATA

Attributes Update History LAST UPDATED 14 MINUTES AGO | Rows: -

Heads up! Updates that you make via the API are not reflected on this page. Check the API logs in your system for the API update records.

### Update History

UPLOAD DATE	FILENAME	SOURCE	USER	UPDATE TYPE	ROW COUNT
<span>✓</span> FEB 8 2024, 2:09 PM	<a href="#">VIP_Members_2024_v2.csv</a>	WIZARD	swalken@monetate.com	Full	34,378
<span>!</span> FEB 8 2024, 1:55 PM	<a href="#">VIP_Members_2024_v1.csv</a>	WIZARD	swalken@monetate.com	Partial	--
<span>✓</span> FEB 8 2024, 12:49 PM	<a href="#">VIP_Members_2024.csv</a>	WIZARD	swalken@monetate.com	Full	34,378

If the platform is processing a just-uploaded file, then the Current Updates table that shows pending updates appears above the Update History table.

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## VIP\_Members\_2020

UPLOAD DATA

Attributes Update History PENDING | Rows: -

Heads up! Updates that you make via the API are not reflected on this page. Check the API logs in your system for the API update records.

### Current Updates

UPLOAD DATE	FILENAME	SOURCE	USER	UPDATE TYPE	ROW COUNT
<span>⌚</span> PENDING	<a href="#">VIP_Members_2024.csv</a>	WIZARD	swalken@monetate.com	Full	--

### Update History

UPLOAD DATE	FILENAME	SOURCE	USER	UPDATE TYPE	ROW COUNT
<span>✓</span> MAY 16 2023, 9:03 AM	<a href="#">VIP_Members_2023_v4.csv</a>	WIZARD	swalken@monetate.com	Full	34,378

Once the platform finishes processing the file, it appears at the top of the Update History table.

## Downloading Datasets

You can download a file from a dataset's **Update History** tab. You can download files successfully uploaded to the platform as well as files that resulted in one or more upload errors.



Monetate retains dataset files for 180 days from the date it was uploaded. Once a file is out of this retention period, it still appears on the dataset's **Update History** tab, but you cannot download it.

If a file is available for download, its filename appears in purple in the Update History table.

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# VIP\_Members\_2020

[↑ UPLOAD DATA](#)

Attributes **Update History** ✓ LAST UPDATED 14 MINUTES AGO | Rows: -

🔔 Heads up! Updates that you make via the API are not reflected on this page. Check the API logs in your system for the API update records.

## Update History

UPLOAD DATE	FILENAME	SOURCE	USER	UPDATE TYPE	ROW COUNT
✓ FEB 8 2024, 2:09 PM	<a href="#">VIP_Members_2024_v2.csv</a>	WIZARD	swalken@monetate.com	Full	34,378
⚠ FEB 8 2024, 1:55 PM	<a href="#">VIP_Members_2024_v1.csv</a>	WIZARD	swalken@monetate.com	Partial	-
✓ FEB 8 2024, 12:49 PM	<a href="#">VIP_Members_2024.csv</a>	WIZARD	swalken@monetate.com	Full	34,378
✓ MAY 16 2023, 9:03 AM	VIP_Members_2023_v4.csv	WIZARD	swalken@monetate.com	Full	34,378

Click the filename and then save it to a location on your computer.