

# Upload a Customer Attributes Dataset



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 [Upload a Customer Dataset](#).

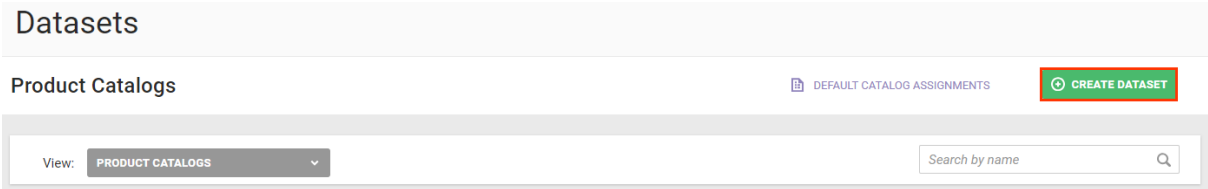
A Customer Attributes dataset contains data you've collected about customers. You can use this type of dataset and its data to better target customers and personalize their experiences on your site.



Before you upload a dataset to Monetate, ensure that it meets the requirements as explained in [Customer Dataset Upload Requirements](#).

Follow these steps to create a Customer Attributes dataset.

1. Click **DATASETS** in the top navigation bar, and then click **CREATE DATASET**.



2. Select **Customer Attribute** and then click **NEXT**.

## Create Dataset Schema



Select the dataset's schema type, then follow the steps to name and configure the dataset according to the requirements of that type. You'll have options to later upload files via API, SFTP, or manual upload.

### 1 Dataset Type EDITING

Select a Dataset type.



Product Catalog



Recommendation



Customer Attribute



Custom List



NEXT



### 2 Dataset Name

3. Name the dataset you're creating, and then click **NEXT**.



The name must begin with a letter and contain only letters, numbers, and underscores.

## Create Dataset Schema



Select the dataset's schema type, then follow the steps to name and configure the dataset according to the requirements of that type. You'll have options to later upload files via API, SFTP, or manual upload.



### Dataset Type EDIT



Customer Attribute



### 2 Dataset Name EDITING

VIP\_Members\_2020

BACK

NEXT



### 3 Add Dataset

4. Drag and drop the file you want to upload into the Create Dataset Schema wizard, and then review the schema generated to ensure all the column headers are present and correct. Select **My file looks good**, and then click **NEXT**.



The file must be in the CSV or TSV format. Schema and field names must begin with a letter and contain only letters, numbers, and underscores. If the file you attempt to upload does not meet these requirements, an error message appears.

Correct the errors in the file, and then upload it again to the wizard.

The screenshot shows a wizard interface with the following elements:

- Dataset Name** [EDIT](#): A text input field containing "VIP\_Members\_2020".
- 3 Add Dataset** [EDITING](#):
  - Instruction: "Upload a file to generate a schema. We'll import the first few rows of data and use the column headers to identify potential attributes. These column headers determine how we'll ingest data later on."
  - Drop zone: "Drop Your File Here" with an upload icon and the text "YOU CAN ALSO [BROWSE](#) FOR A FILE TO UPLOAD". Accepted types: "Accepted types: csv, tsv".
  - Reminder: "Reminder: Please consult with your Monetate Agreement for any restrictions on Customer Data that may be uploaded to the Monetate Platform."
  - Navigation: "BACK" and "NEXT" buttons.
- 4 Define Data Types and Select Unique ID**
- 5 Add Identifier Name and Save**

5. Confirm that the data type selected for each attribute is correct, then select an attribute to be the dataset's Unique ID, and then click **NEXT**.



If an attribute has the wrong data type associated with it, then the data can't be processed correctly when you use the dataset within the platform.

✓ **Add Dataset** [EDIT](#)

CUSTOMERID	LIFECYCLE_STATE	ENGAGEMENT_STATE
account.AE227I2QT7WZIP5XKLXBMVKVBUFA	Activated_Prospect	Engaged

**4 Define Data Types and Select Unique ID** [EDITING](#)

Designate a Unique Identifier for this Dataset and double check the data type for each attribute.

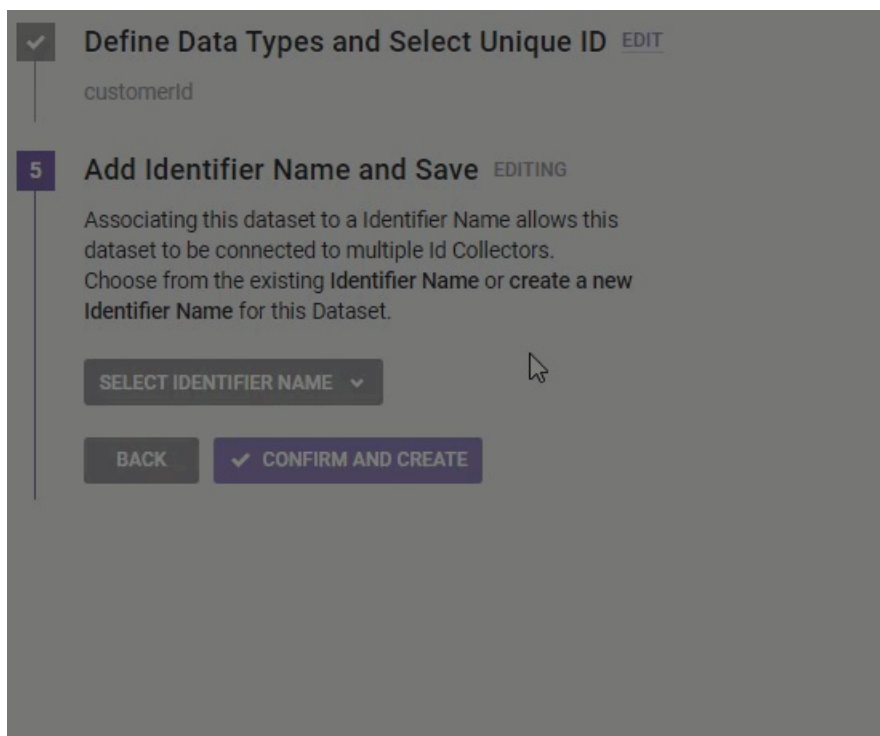
UNIQUE ID	ATTRIBUTE NAME	DATA TYPE
<input type="radio"/>	Engagement_State	STRING
<input type="radio"/>	Lifecycle_State	STRING
<input type="radio"/>	Lifetime_Product_Sales	STRING
<input type="radio"/>	Rewards_Enrolled	STRING
<input type="radio"/>	customerId	STRING

[BACK](#) [NEXT](#)

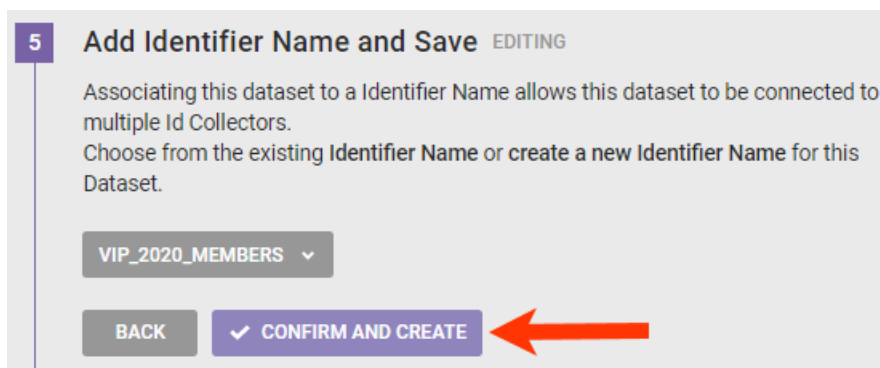
- Select or create an Identifier Name so that you can connect the dataset to one or more ID Collectors, and then click **SAVE**.



An Identifier Name can contain only letters, numbers, and underscores.



7. Click **CONFIRM AND CREATE**.



Engine API clients must take additional steps to make use of a Customer Attributes dataset, including sending the Identifier Name as a custom variable in a request. See [Identifying Known Customers Included in a Customer Datasets in User Identity Persistence in Requests in the Monetate Developer Hub](#) for more information.

After you click **CONFIRM AND CREATE** in the wizard, a message appears on the screen informing you that the file is uploading and then updates when the upload is complete.

## Upload Data to VIP\_Members\_2020



**Heads up:** You can configure your datas to automatically update via SFTP or our API instead. Read our [Knowledge Base Article](#) on getting started for more details.

Upload Complete



dataset-18266\_v20210126.csv uploaded successfully. High fives.



**Reminder:** Please consult with your Monetate Agreement for any restrictions on Customer Data that may be uploaded to the Monetate Platform.

CLOSE

You can click **CLOSE** to dismiss this message before the upload is complete. If you choose not to do that or if the upload completes quickly, this message can swiftly be replaced by the details page for the newly created dataset, with the **Update History** tab showing. The status is **PENDING** until the platform successfully completes processing the file or encounters an error.

[← BACK TO DATASETS](#)

# 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
<b>PENDING</b>	<a href="#">VIP_Members_2020.csv</a>	<b>WIZARD</b>	swalken@monetate.com	<b>Initial Upload</b>	--

Refer to [Customer Attributes Dataset Details Page](#) for more information about the **Update History** tab as well as the **Attributes** tab.