Update 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 Update or Replace a Customer Dataset.

You may find it necessary to update a Customer Attributes dataset, perhaps with more customers with actionable data or with new information about the customers already captured in the dataset.

The type of update you need to perform determines the method(s) available for accomplishing the task.

Updating or Adding Rows

Perhaps you need to update the values that appear in the `recently_viewed_products` attribute in a dataset for customer IDs (`cust_id`) 111 and 115. Therefore, you need to update the rows for those two customer IDs, which you can accomplish through a partial update.

	A	B	C	D	E
1	cust_id	email_subscriber	LTV	gender	recent_viewed_products
2	111	0	$2,300.45	Male	647994
3	115	1	$7,809.38	Female	387181

Maybe instead of updating attribute values, you need to add data for customers with the IDs 116, 117, and 118. Each customer ID represents a new row, which you can upload to the dataset through a partial update.

	A	B	C	D	E
1	cust_id	email_subscriber	LTV	gender	recent_viewed_products
2	116	1	$3,901.56	Female	333800
3	117	1	$22,109.00	Female	989900
4	118	0	$800.22	Male	6414098

If you need to add or replace rows of customer information within a dataset, you can perform a partial update through the Data API, via SFTP, or using the Upload Data wizard in the platform.

For more information about using the Data API for an update, refer to Update a Customer Attributes Dataset via the Data API. See Update a Customer Attributes Dataset via SFTP for more information about using an account's specific SFTP setup to send an update.

When using the Upload Data wizard to add or update rows in a product catalog dataset, you can either drag and drop a file directly into the wizard, or you can input a URL to a dataset file that you store on Amazon S3. Regardless of which of these two upload options you select, the file that you use must be in the CSV or TSV format.

Uploading a File Directly

Follow these steps to add rows to or update existing rows in a Customer Attributes dataset by uploading a file directly to the Monetate platform.

1. Click **DATASETS** in the top navigation bar, and then select **Customer Attributes** from **View** on the Datasets list page.

2. Find the Customer Attributes dataset that you want to update, click the upload icon for its entry, and then select **Data File Upload**.

3. Select **Partial Update** and then click **NEXT**.

Upload Data to VIP_Members_2020

1 **Partial or Full Update?** EDITING

Would you like to only update select rows or replace the entire dataset?

Partial Update
To add or update select rows

Full Update
To replace the entire dataset

NEXT ←

2 **Manual File Upload or Pre-signed S3 URL?**

4. Select **Manual File Upload** and then click **NEXT**.

Upload Data to VIP_Members_2020 ✕

✓ **Partial or Full Update?** EDIT

✓ **Partial Update**
To add or update select rows

2 Manual File Upload or Pre-signed S3 URL? EDITING

How would you like to update the dataset?

✓ **Manual File Upload**
Upload using a local file

○ **Upload File Using Pre-signed S3 URL**
Upload a file using your pre-signed S3 URL

BACK   NEXT   ⬅

3 Upload Your File or Paste Your Pre-signed S3 URL

5. Drag and drop the file into the wizard.

Monetate ingests the file and closes the Upload Data wizard. When the dataset's **Update History** tab loads, a message briefly appears that informs you that the file was successfully uploaded. Additionally, PENDING appears where the timeframe of the last update normally appears.

If the file failed to upload or the platform encountered other errors, you see messages indicating the problem. See Failed Updates in this documentation for more information.

Uploading a File Using an Amazon S3 URL

Follow these steps to add rows to or update existing rows in a product catalog by uploading a dataset file using an Amazon S3 pre-signed URL.

1. Generate the pre-signed URL for the file you want to upload.

> ℹ️ Refer to Sharing objects using presigned URLs in the Amazon Simple Storage Service (S3) user documentation for more information about generating a URL for this purpose.

2. Click **DATASETS** in the top navigation bar, and then select **Customer Attributes** from **View** on the Datasets list page.

3. Find the Customer Attributes dataset that you want to update, click the upload icon for its entry, and then select **Data File Upload**.

4. Select **Partial Update** and then click **NEXT**.

Upload Data to VIP_Members_2020   ✕

1 **Partial or Full Update?** EDITING

Would you like to only update select rows or replace the entire dataset?

✔ **Partial Update**
   To add or update select rows   📄

○ **Full Update**
   To replace the entire dataset   📄

NEXT ⬅

2 **Manual File Upload or Pre-signed S3 URL?**

5. Select **Upload File Using Pre-signed S3 URL**, and then click **NEXT**.

6. Paste the Amazon S3 URL into the field, and then click **FINISH**.

The Upload Data wizard closes and Monetate ingests the file. When the dataset's details page loads, a message briefly appears that informs you that the file was successfully uploaded from the Amazon S3 URL. Additionally, PENDING appears where the timeframe of the last update normally appears.

If the file failed to upload or the platform encountered other errors, you see messages indicating the problem. See Failed Updates in this documentation for more information.

Updating Attributes

Perhaps the dataset update you need to perform entails adding information about whether or not each customer made a purchase in the last month. That information is captured in the purchased_in_last_month attribute,

which currently the dataset doesn't include.

	A	B	C	D	E	F
1	cust_id	email_subscriber	LTV	gender	recent_viewed_products	purchased_in_last_month
2	111	0	$2,300.45	Male	1481478	0
3	112	1	$76,813.81	Female	1476845	1
4	113	1	$87,623.12	Female	685387031	0
5	114	0	$2,346.45	Male	1482289	1
6	115	1	$7,809.38	Female	221498	1
7	116	1	$3,901.56	Female	333800	1
8	117	1	$22,109.00	Female	989900	0
9	118	0	$800.22	Male	6414098	0

Whether you need to add one or multiple attributes to a Customer Attributes dataset, you have two options to accomplish this task:

- Send a full file update using the Data API
- Use the Add Attribute modal accessible from the dataset's details page

> ℹ️ You cannot use the Data Update wizard to add attributes to a Customer Attributes dataset. You can only use the wizard to remove attributes. See Removing Attributes in this documentation for more information.

Using the Add Attribute Modal

Follow these steps to add an attribute to a Customer Attributes dataset's schema.

1. Navigate to the dataset's details page.
2. Click **ADD ATTRIBUTE** on the **Attributes** tab.

< BACK TO DATASETS

VIP_Members_2020 ✎

⬆ UPLOAD DATA ⌄

Attributes   Update History

✅ LAST UPDATED 21 MINUTES AGO | *Rows: -*

Identifier Name: VIP ✎

⊕ ADD ATTRIBUTE

Name	Unique ID	Data Type	Experience Usage

3. Type the new attribute's name into **ATTRIBUTE NAME**.

> ℹ️ Attribute names must begin with a letter and contain only letters, numbers, and underscores.

4. Select the new attribute's data type from **ATTRIBUTE TYPE**.

> ⚠ If an attribute has the wrong data type associated with it, then the data cannot be processed correctly when you use the dataset within the platform.

5. If necessary, click **ADD ATTRIBUTE** to generate another set of fields for another attribute, and then repeat steps 3 and 4 for the additional new attribute.

6. Click **SAVE**.

The new attributes appear at the bottom of the table. There is no indication the new attributes have no data associated with them.

Because the new attributes now exist within the dataset schema in the platform, you must perform a partial update with a file that contains values for them. Refer to Updating or Adding Rows in this documentation for more information about partial updates.

Removing Attributes

If you need to remove attributes from a Customer Attributes dataset, then you can upload a full file update using the Upload Data wizard within the platform.

> ⚠ You cannot remove the attribute set as the Unique ID. If you want a dataset that doesn't include the attribute selected as the Unique ID, then you must create a new dataset.

Even though removing attributes from a dataset rebuilds the dataset schema, you must ensure the full update still matches the order of attributes in the existing schema. Furthermore, you cannot revise the data type for any existing attributes

> **!** You cannot edit existing attribute names, their corresponding data type, nor can you change the Unique ID or Identifier Name. If you need to change any of these aspects, then create a new dataset.

When using the Upload Data wizard to remove attributes, you can either drag and drop a file directly into the wizard, or you can input a URL to a dataset file that you store on Amazon S3. Regardless of which of these two upload options you select, the file that you use must be in the CSV or TSV format.

Uploading a File Directly

Follow these steps to remove one or more attributes by uploading a dataset file directly to the Monetate platform.

1. Click **DATASETS** in the top navigation bar, and then select **Customer Attributes** from **View** on the Datasets list page.

2. Find the Customer Attributes dataset that you want to update, click the upload icon for its entry, and then select **Data File Upload**.

Datasets

Customer Attributes

⊕ CREATE DATASET

View:	CUSTOMER ATTRIBUTES ▼					VIP ✕
NAME		UNIQUE ID	IDENTIFIER NAME ⓘ	EXPERIENCE USAGE	LAST UPDATED	UPLOAD
VIP_Members_2020 CUSTOMER ATTRIBUTE		customerId	VIP	0 active 0 inactive	✅ 14 DAYS AGO	⬆

UPLOAD DATA:

API Info

SFTP Info

➡ **Data File Upload**

3. Select **Full Update** and then click **NEXT**.

Upload Data to VIP_Members_2020   ✕

1 **Partial or Full Update?** EDITING

Would you like to only update select rows or replace the entire dataset?

○ **Partial Update**
   To add or update select rows   📄

✅ **Full Update**
   To replace the entire dataset   📄

NEXT ⬅

2 Manual File Upload or Pre-signed S3 URL?

4. Select **Manual File Upload,** and then click **NEXT**.

Upload Data to VIP_Members_2020 ✕

✓ **Partial or Full Update?** EDIT

✓ **Full Update**
To replace the entire dataset 📄

2 **Manual File Upload or Pre-signed S3 URL?** EDITING

How would you like to update the dataset?

✓ **Manual File Upload**
Upload using a local file

○ **Upload File Using Pre-signed S3 URL**
Upload a file using your pre-signed S3 URL

BACK   NEXT ⬅

3 **Upload Your File or Paste Your Pre-signed S3 URL**

5. Drag and drop the file into the wizard.

Monetate ingests the file and closes the Upload Data wizard. When the dataset's details page loads, a message briefly appears that informs you that the file was successfully uploaded. Additionally, PENDING appears where the timeframe of the last update normally appears since the update is in progress.

If the file failed to upload or the platform encountered other errors, you see messages indicating the problem. See Failed Updates in this documentation for more information.

Uploading a File Using an Amazon S3 URL

Follow these steps to remove one or more attributes by uploading a dataset file using an Amazon S3 pre-signed URL.

1. Generate the pre-signed URL for the file you want to upload.

> 🛈 Refer to Sharing objects using presigned URLs in the Amazon Simple Storage Service (S3) user documentation for more information about generating a URL for this purpose.

2. Click **DATASETS** in the top navigation bar, and then select **Customer Attributes** from **View** on the Datasets list page.

3. Find the Customer Attributes dataset that you want to update, click the upload icon for its entry, and then select **Data File Upload**.

4. Select **Full Update** and then click **NEXT**.

Upload Data to VIP_Members_2020

1 **Partial or Full Update?** EDITING

Would you like to only update select rows or replace the entire dataset?

Partial Update
To add or update select rows

Full Update
To replace the entire dataset

NEXT

2 **Manual File Upload or Pre-signed S3 URL?**

5. Select **Upload File Using Pre-signed S3 URL**, and then click **NEXT**.

Upload Data to VIP_Members_2020 ✕

Partial or Full Update? EDIT

✓ **Full Update**
To replace the entire dataset

2 | **Manual File Upload or Pre-signed S3 URL?** EDITING

How would you like to update the dataset?

○ **Manual File Upload**
Upload using a local file

✓ **Upload File Using Pre-signed S3 URL**
Upload a file using your pre-signed S3 URL

BACK   NEXT

3 | Upload Your File or Paste Your Pre-signed S3 URL

6. Paste the Amazon S3 URL into the field, and then click **FINISH**.

The Upload Data wizard closes and Monetate ingests the file. When the dataset's details page loads, a message briefly appears that informs you that the file was successfully uploaded from the Amazon S3 URL. Additionally, PENDING appears where the timeframe of the last update normally appears.

If the file failed to upload or the platform encountered other errors, you see messages indicating the problem. See Failed Updates in this documentation for more information.

Failed Updates

If the platform encounters an error with the update, you see UPDATE FAILED in multiple places within the platform:

- In the LAST UPDATED column for the dataset's entry on the Customer Attributes view of the Datasets list page

- In place of the last update's timeframe on the dataset's details page

- In the UPLOAD DATE column in the Update History table on the **Update History** tab

Click that message to view the File Upload Error modal containing the reason(s) for the failure.

File Upload Error   ✕

- **Unknown header field 'test1'. (line 1)**

Please update your file and try again, or contact support@monetate.com if the problem persists.

CLOSE

Refer to Customer Dataset Upload Requirements to ensure the update file conforms to the criteria for this type of dataset.