

Update a Customer Attributes Dataset via SFTP



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 the [alternate version of this documentation](#).

Data onboarding allows you to upload offline data about your customers to the platform as a Customer Attributes dataset. The automatic updates feature lets you regularly deliver full or partial file updates over SFTP to Monetate, which automatically checks for, processes, and updates the datasets and any associated experiences.

How Automatic Updates Work

Any current dataset created with the platform's Create Dataset Schema wizard is assigned a dataset ID. This ID is used in the filename of the update to match it to an existing dataset. Once you upload a file to the platform's SFTP server, it automatically updates the dataset and all associated experiences.

If the update failed, you'll see an alert on the dataset's entry on the Customer Attributes view of the [Datasets list page](#).

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	UPDATE FAILED	

You can perform two types of updates for a Customer Attributes dataset:

- **Full Update:** Replaces the entire dataset with the next successfully processed full file that the platform ingests
- **Partial Update:** Adds rows or updates rows with the next successfully processed partial file that the platform ingests



You cannot add columns, also called attributes or fields, to a dataset through a partial update sent via SFTP. See [Customer Attributes Dataset Details Page](#) for information on the Add Attributes modal accessible from a dataset's details page. This modal allows you to add attributes to the dataset's schema without uploading a file.

In addition to CSV and TSV files, you can upload Gzip (.gz) and ZIP (.zip) files via SFTP.



You can only use the .gz file extension for a Gzip file. Monetate doesn't accept files with the .gzip file extension.

Any full or partial updates that are older than the most recent full file update are archived. While Monetate does periodically clean up the history folder, all files remain archived for a minimum of 24 hours.

You can also access these files on the **Update History** tab on the dataset's details page in the Monetate platform.



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.

< [BACK TO DATASETS](#)

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	VIP_Members_2024_v2.csv	SFTP	N/A	Full	34,378
⚠ FEB 8 2024, 1:55 PM	VIP_Members_2024_v1.csv	WIZARD	swalken@monetate.com	Partial	-
✓ MAY 16 2023, 9:03 AM	VIP_Members_2023_v4.csv	SFTP	N/A	Full	34,378

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

Setting Up Automatic Updates

To set up automatic updates, add the following information to your SFTP client:

- **Host:** `https://sftp.monetate.net`
- **Port:** `22`
- **Protocol:** `SFTP`

The username(s) you can find within the platform by selecting **Sites** from the settings cog in the platform.

The screenshot shows the Monetate dashboard for monetate.mybigcommerce.com. The top navigation bar includes 'DASHBOARD', 'EXPERIENCES', 'AUDIENCES', 'COMPONENTS', 'DATASETS', and 'ANALYTICS'. A settings gear icon is highlighted with a red box. A dropdown menu is open, showing 'ACCOUNT' and 'CONTENT' sections. The 'Sites' option is highlighted with a purple bar and a red arrow points to it. Other options in the menu include API Documentation, Users, Script Revision, Integration, Compliance Tools, Default Metrics, Email, Seasonality, Engine Context, and Experience Tags. The main dashboard area displays analytics for '30 DAYS' with three cards: '1 Auto Personalization experience', 'Dynamic Test experiences', and '8 Standard'.

From that same page you can create new SFTP credentials or change an existing SFTP user password. See [Manage SFTP Users](#) for more information.



You must have the Administrator role in Monetate to set up SFTP users in the platform settings.

File-Drop Directories and Naming Conventions

There are two file-drop directories:

- `/datasets/partial`: Use this location for partial file updates
- `/datasets/full`: Use this location for full file updates

Follow this format when naming an update file:

```
{datasetid}-examplefilename.csv
```

Replace `{datasetid}` with the unique ID for the dataset you are updating. You can find this information in the platform by following these steps:


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





Datasets

Product Catalogs

DEFAULT CATALOG ASSIGNMENTS

CREATE DATASET

View: **PRODUCT CATALOGS**  Search by name

NAME	UNIQUE ID	CONNECTED DOMAINS	LAST UPDATED	UPLOAD
Product_H PRODUCT Customer Attributes	id	0 Connected domains	7 HOURS AGO	
Product_H PRODUCT CATALOG Behavioral Triggers Extracts	id	0 Connected domains	UPDATE FAILED	
Product_H22025 PRODUCT CATALOG	id	0 Connected domains	WAITING FOR YOU TO PROVIDE DATA	
Product_H12024 PRODUCT CATALOG	id	1 Connected domains	8 DAYS AGO	


- Find the Customer Attributes dataset that you want to update, click the upload icon for its entry, and then select **SFTP Info**.


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

- Scroll to the bottom of the modal to find the dataset ID, and then copy it to add it to the dataset's filename.



You must use a hyphen (-) between the dataset ID and the filename. The upload or update will fail if the dataset ID and filename are not separated by a hyphen.

Use the following information to send updates to Monetate:

1. Use your preferred SFTP client to connect to this server URL:

```
sftp://sftp.monetate.net
```

2. Navigate to this directory for FULL dataset updates:

```
/datasets/full
```

3. Navigate to this directory for PARTIAL dataset updates:

```
/datasets/partial
```

4. Add this required prefix to your dataset file name:

```
27580-
```

Ex: example.csv becomes 1956-example.csv

Your uploaded file will be detected within 15 minutes, after which point its status will be visible in the UI

CLOSE

You can change the portion of the filename that follows the hyphen from update to update. However, you cannot change the dataset ID.

If you want to update an existing dataset without adding new columns, you can optionally exclude the header row from the file. Add `NOHEADER` to the end of the filename (`{datasetid}-filename_NOHEADER.csv`) to indicate that the file doesn't contain a header row.



If you exclude a header row from a dataset update, ensure the columns in the file match the order of the columns in the existing dataset. If the columns are not in the same order, the platform cannot match them up with the corresponding columns in the dataset.

Receiving Notifications for Automated Updates

You can receive an email notification every time a file successfully uploads via SFTP as well as a notification every time an error occurs during the upload process. Follow these steps to enable one or both notifications.

1. Click the settings cog, select **Users**, and then click the user account for which you want to enable notifications.
2. Enable one or both SFTP-related email notifications.

First name

Spencer

Last name

Walken

Email

swalken@monetate.com

Role

EXPERIENCE MANAGER ▾

Receive email notifications for experience auto promotion, goal significance, and traffic alerts

NO

Receive Dataset SFTP Error email notifications for monetate.mybigcommerece.com

NO

Receive Dataset SFTP Success email notifications for monetate.mybigcommerece.com

NO

Receive Catalog Parsing Error email notifications for monetate.mybigcommerece.com

NO

Active user

YES

Login Method

MONETATE LOGIN - VIA MARKETER.MONETATE.NET ▾

SAVE

CANCEL

3. Click **Save**.

First name

Spencer

Last name

Walken

Email

swalken@monetate.com

Role

EXPERIENCE MANAGER ▾

Receive email notifications for experience auto promotion, goal significance, and traffic alerts

NO

Receive Dataset SFTP Error email notifications for monetate.mybigcommerece.com

YES

Receive Dataset SFTP Success email notifications for monetate.mybigcommerece.com

YES

Receive Catalog Parsing Error email notifications for monetate.mybigcommerece.com

NO

Active user

YES

Login Method

MONETATE LOGIN - VIA MARKETER.MONETATE.NET ▾

SAVE

CANCEL

If you have questions, see the [FAQ](#) or submit a support ticket using the Monetate Technical Support portal (support.monetate.com).