Upload a Customer Dataset

This content is only for clients with **Product Data** and **Customer Data** options in the **DATASETS** menu in the top navigation bar. If no menu options appear when you click **DATASETS**, then this content doesn't apply to your account. Instead, see Upload a Customer Attributes Dataset.

Follow these steps to create a customer dataset.

Before you upload a dataset to the platform, ensure that it meets the requirements as explained in Customer Dataset Upload Requirements.

1. Click **DATASETS** in the top navigation bar, and then select **Customer Data**.
2. Click **UPLOAD DATA**.

3. Click **Create New Dataset**, give the new dataset a name, and then click **NEXT**.

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

4. Drag and drop into the Datasets Upload wizard the file you want to upload, and then review the schema generated to ensure all the column headers are present and correct. Click **NEXT** if the schema preview is correct, or click **CANCEL UPLOAD** to exit the wizard if you find errors.

   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 doesn't meet these requirements, an error message appears. Correct the errors in the file, and then re-upload it to the wizard.

5. Confirm that the information for each attribute is correct, and then click **NEXT**. You can optionally take these actions:
   - Edit the attribute's name that appears on the new dataset's details page if you don't want it to match its field name as it appears in the column header of the CSV file.
   - Toggle **INCLUDE** to **EXCLUDE** if you don't want an attribute to be part of the dataset.

   If an attribute has the wrong data type associated with it, then the platform cannot process the data correctly.

6. Choose from **Dataset Identifier** the attribute that captures the customer ID or other unique ID used to identify visitors.

> The attribute you select must have the **TEXT** data type. If it doesn't, an error message warns you of the discrepancy. You can change the data type by clicking **CHANGE FORMAT** to navigate to the previous step, change the data type to **TEXT**, and then click **NEXT** to return.

7. Select the ID Collector that stores a visitor's customer ID and then click **NEXT**. If the ID Collector isn't listed, click **CREATE ID COLLECTOR** to create it, and then follow the steps in Setting Up an ID Collector in this documentation.

> The ability to use Target Builder to create an ID Collector is only accessible from the Datasets Upload wizard. No option for building this identifier is available if you launch Target Builder from any other place in the platform.

8. Confirm all the information on the summary screen is correct, and then click **FINISH**.

> Engine API clients must take additional steps to make use of a customer dataset. See Identifying Known Customers Included in a Customer Datasets in User Identity Persistence in Requests in the Monetate Developer Hub for more information.

After the file upload is complete, you can find an entry for the new dataset on the Customer Datasets list page, from which you can access its details page.

Refer to Customer Dataset Details Page for more information.

Setting Up an ID Collector

The ID Collector allows Monetate to remember your customers for future targeting and segmentation. Follow these steps to create one using Target Builder.

1. Click **CREATE ID COLLECTOR**.

2. Click the target type you want to use for the collector. You can create it based on a cookie value, the content of an HTML element, the value of a JavaScript variable, or a query parameter value.

3. Select the element or input the cookie name, JavaScript variable name, or the query parameter name, depending on the target type. When you're finished, click the forward arrow.

> For additional guidance completing an ID Collector in Target Builder, see one of the following resources in Create an ID Collector:
>
> - Steps 3 through 5 of Creating an ID Collector for a Cookie Value

- Steps 3 through 5 of Creating an ID Collector for a JavaScript Variable Value
- Steps 3 through 5 of Creating an ID Collector for HTML Element Content
- Steps 3 through 5 of Creating an ID Collector for a Query Parameter Value

4. Name the ID Collector target, and then enter a description. Click **SAVE & RETURN** to return to the Datasets Upload wizard.

You can now select in the wizard the ID Collector that you just built so that you can then continue creating the dataset.

If the collector you created doesn't appear in **ID Collector**, click **REFRESH LIST**.