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. Choose from the selector the on-site identifier that stores a visitor's customer ID. If it is not listed in the selector, click **CREATE ID COLLECTOR** to launch Target Builder, create the ID Collector, and then return to the Datasets Upload wizard to select the newly created identifier. Click **NEXT** after you select an ID Collector.

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 Calling the Engine API 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.