Update or Replace 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 Update a Customer Attributes Dataset.

You may need to update a customer dataset, perhaps to add more customers with actionable data or to add new information about the customers already in the dataset.

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

Updating or Adding Rows to a Dataset

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

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

Maybe instead you must add new 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
	cust_id	**email_subscriber**	**LTV**	**gender**	**recent_viewed_products**
1					
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 rows, replace rows, or add or replace values within rows of customer information in a dataset, you must perform a partial update through the Data API, via SFTP, or using the Datasets Upload wizard in the platform.

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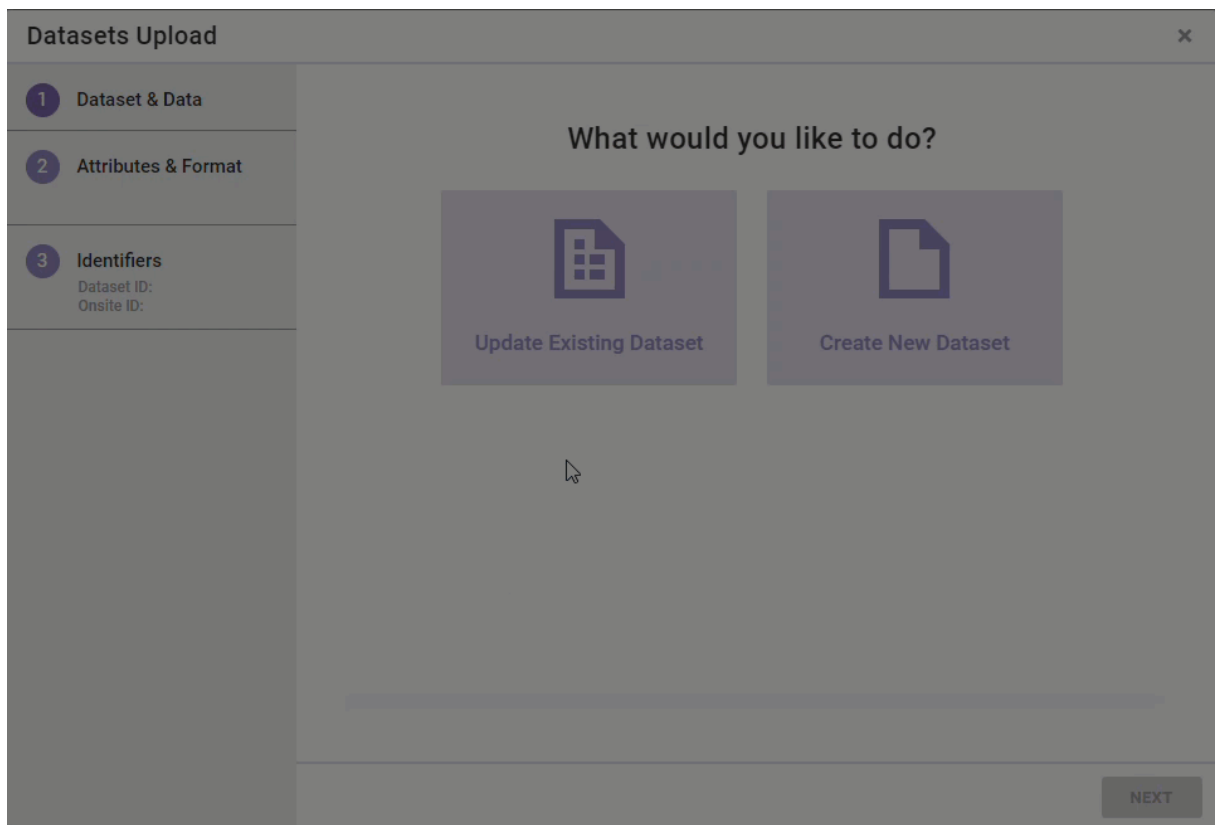
Using the Datasets Upload Wizard for a Partial Update

Follow these steps to add rows to or update rows already in a customer dataset.

1. Click **UPLOAD DATA** on the Customer Datasets list page.
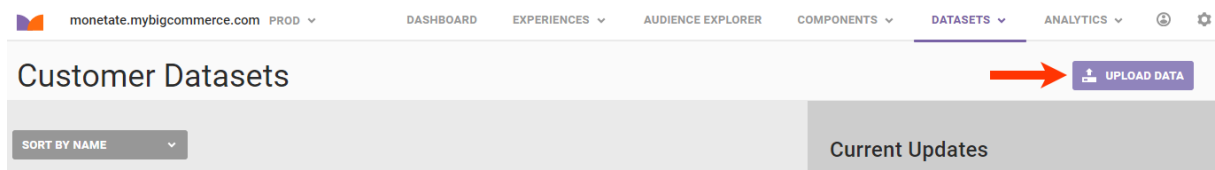
2. Click **Update Existing Dataset**, choose the dataset you want to update, and then click **NEXT**.

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

4. Drag and drop the file with the updated data into the wizard and then click **NEXT**.

> **i** The preview may show only some or may not show any of the new or updated data. The absence *does not* indicate the update failed.

5. Click **NEXT** on the screen showing the potential attributes because you cannot edit or exclude any of the attributes.

Datasets Upload   ✕

Dataset & Data
Dataset: VIP_Members
File: VIP_Members_2023_v2....
Update Type: Partial Update

Attributes & Format
1. customerId   TEXT
2. Lifecycle_State   TEXT
3. Engagement_...   TEXT
4. Rewards_Enr...   TRUE/FA...
5. Lifetime_Pro...   NUMBER

Identifiers
Dataset ID: customerId
Onsite ID: Customer ID

We found 5 potential attributes.

Please name and confirm which attributes you'd like to use from this dataset.

Note: We do our best to guess attribute format. Please double check that the format for each attribute is correct.

	Include	Name		Format
	⑦			
1.	PRE-EXISTING	*customerId*	AS	TEXT ⌄
2.	PRE-EXISTING	*Lifecycle_State*	AS	TEXT ⌄
3.	PRE-EXISTING	*Engagement_State*	AS	TEXT ⌄
4.	PRE-EXISTING	*Rewards_Enrolled*	AS	TRUE/FALSE ⌄
5.	PRE-EXISTING	*Lifetime_Product_Sales*	AS	NUMBER ⌄

BACK   ➡ NEXT

6. Click **NEXT** on the screen showing the Dataset Identifier and ID Collector because you cannot edit these settings.

Datasets Upload   ✕

Dataset & Data
Dataset: VIP_Members
File: VIP_Members_2023_v2....
Update Type: Partial Update

Attributes & Format
1. customerId   TEXT
2. Lifecycle_State   TEXT
3. Engagement_...   TEXT
4. Rewards_Enr...   TRUE/FA...
5. Lifetime_Pro...   NUMBER

Identifiers
Dataset ID: customerId
Onsite ID: Customer ID

Dataset Identifier

Which column in your data defines the Dataset Identifier for each row?

CUSTOMERID ⌄

ID Collector

Select your ID Collector so we know where "customerId" is found on your website.

CUSTOMER ID ⌄   ↻ REFRESH LIST

Don't have an ID Collector?

⊕ CREATE ID COLLECTOR

customer id	gender	lifetime value
4357	male	$486
6683	male	$789
1234	female	$998
0421	male	$432

In this example, the Dataset IDs are located in the "customer id" column. A lookup of "1234" would map to a gender of "female."

cookie
"cust_id"=1234

Continuing this example, the Customer ID is exposed as the value of a cookie named "cust_id."

BACK   ➡ NEXT

7. Review the dataset summary and then click **FINISH**.

If the platform encounters an error with the update, then an entry appears in the Current Updates column on the Customer Datasets list page. Click it to view the errors.

Adding Attributes to a Dataset

Perhaps you need to add one or more columns, also called attributes or fields, to a customer dataset. You have two options to accomplish this task:

- Send a full file update using the Data API.
- Perform a full file update using the Datasets Upload wizard in the platform.

> ℹ️ You cannot remove attributes from a dataset with a full update using the wizard. You must create a new dataset using the revised attributes and then remove the old one.

For more information about using the Data API for an update, refer to Update Customer Data via the Data API.

Before you update the dataset using the Datasets Upload wizard, ensure the CSV or TSV file you will upload meets these requirements:

- The new attributes appear after the existing ones.
- The order of the existing attributes matches their order in the dataset schema.

If the file fails to meet these requirements, an error message appears.

Correct the errors and then restart the update.

Using the Datasets Upload Wizard for a Full Update

Follow these steps to add attributes to a customer dataset.

1. Click **UPLOAD DATA** on the Customer Datasets list page.

2. Click **Update Existing Dataset**, select the dataset you want to update, and then click **NEXT**.
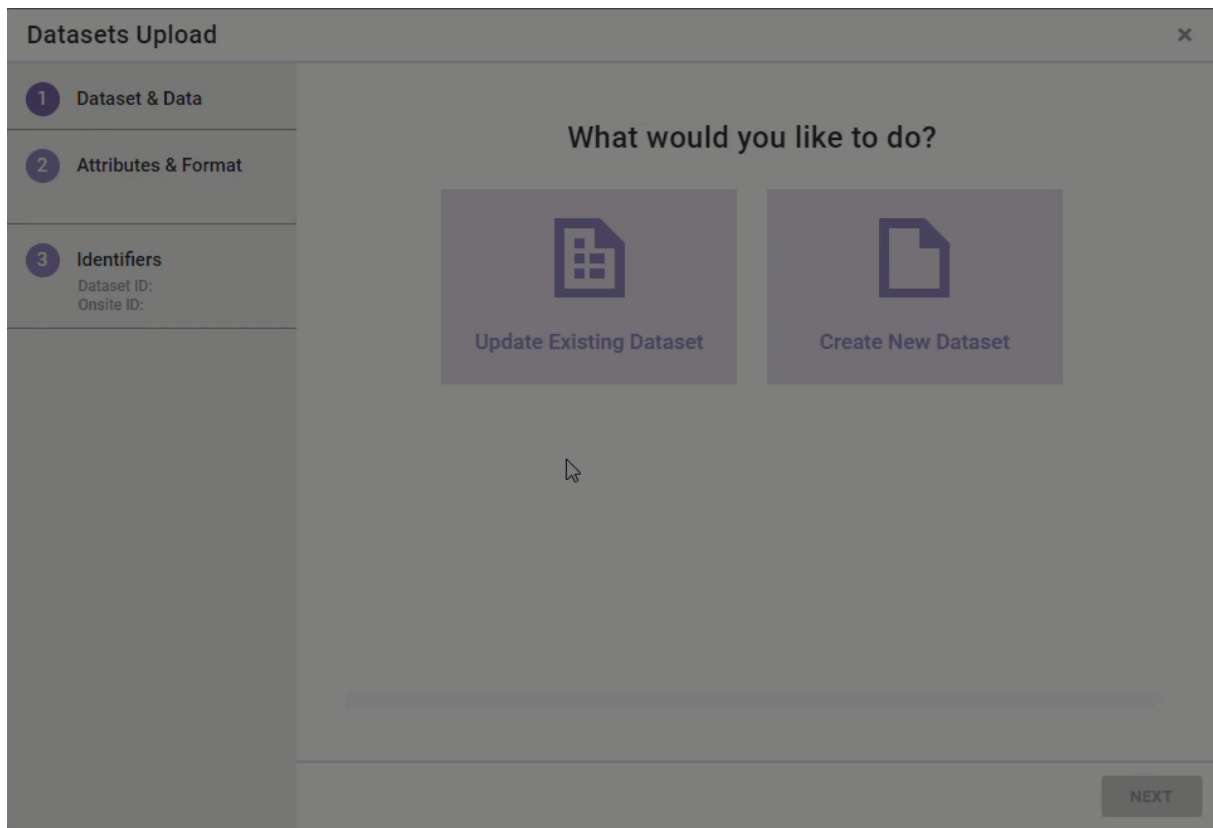
3. Click **Full Update** and then click **NEXT**.
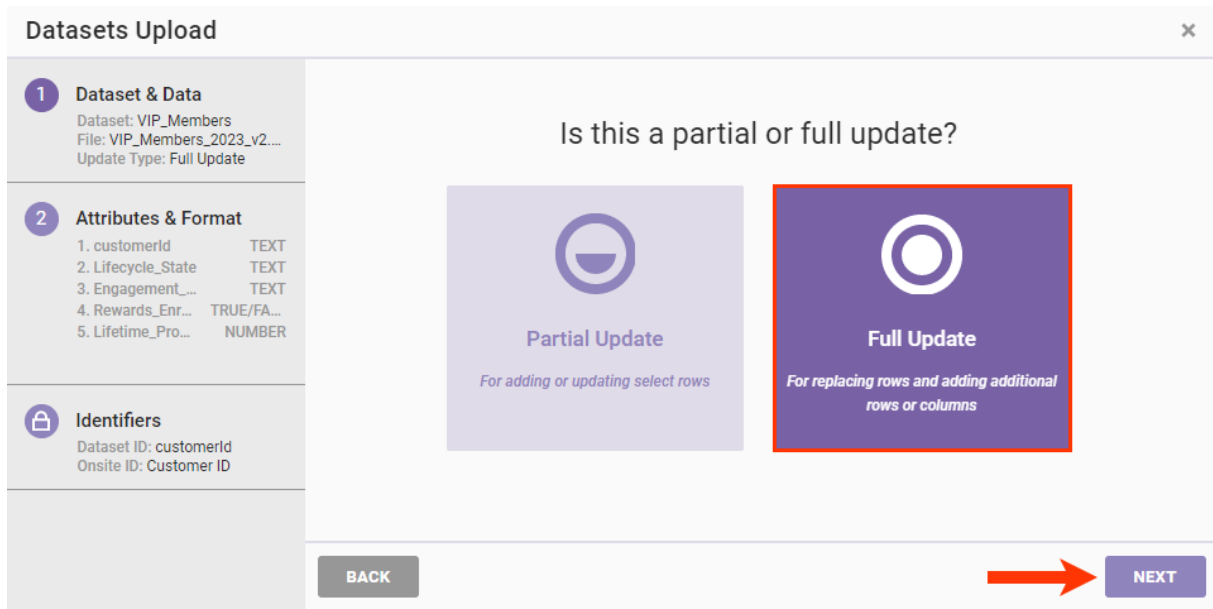
4. Drag and drop the file with the updated data into the wizard and then click **NEXT**.

> ℹ️ The preview may show only some or may not show any of the new or updated data in the preview table. However, the number of new attributes does appear above the preview table.

5. Confirm that the data type selected for each new attribute is correct and then click **NEXT**. You can optionally take these actions for the new attributes:

   - 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 file.
   - Click to change **INCLUDE** to **EXCLUDE** if you don't want an attribute to be part of the dataset.

   > ❗ You cannot edit existing attributes, their corresponding format, or whether or not they are included when you replace a dataset. In addition, you cannot change the Dataset Identifier or ID Collector. If you must change any of these settings, upload a new dataset.

6. Click **NEXT** on the screen showing the Dataset Identifier and ID Collector because you cannot edit these settings.

7. Review the dataset summary and then click **FINISH**.

If the platform encounters an error with the update, then an entry appears in the Current Updates column on the Customer Datasets list page. Click it to view the errors.