

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
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 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
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

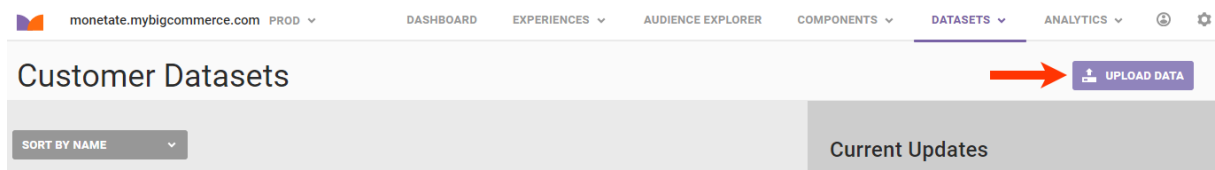
If you need to add rows, replace rows, or add or replace values within rows of customer information in a dataset, you must perform a partial update through the Data API, via SFTP, or using the Datasets Upload wizard in the platform.

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.

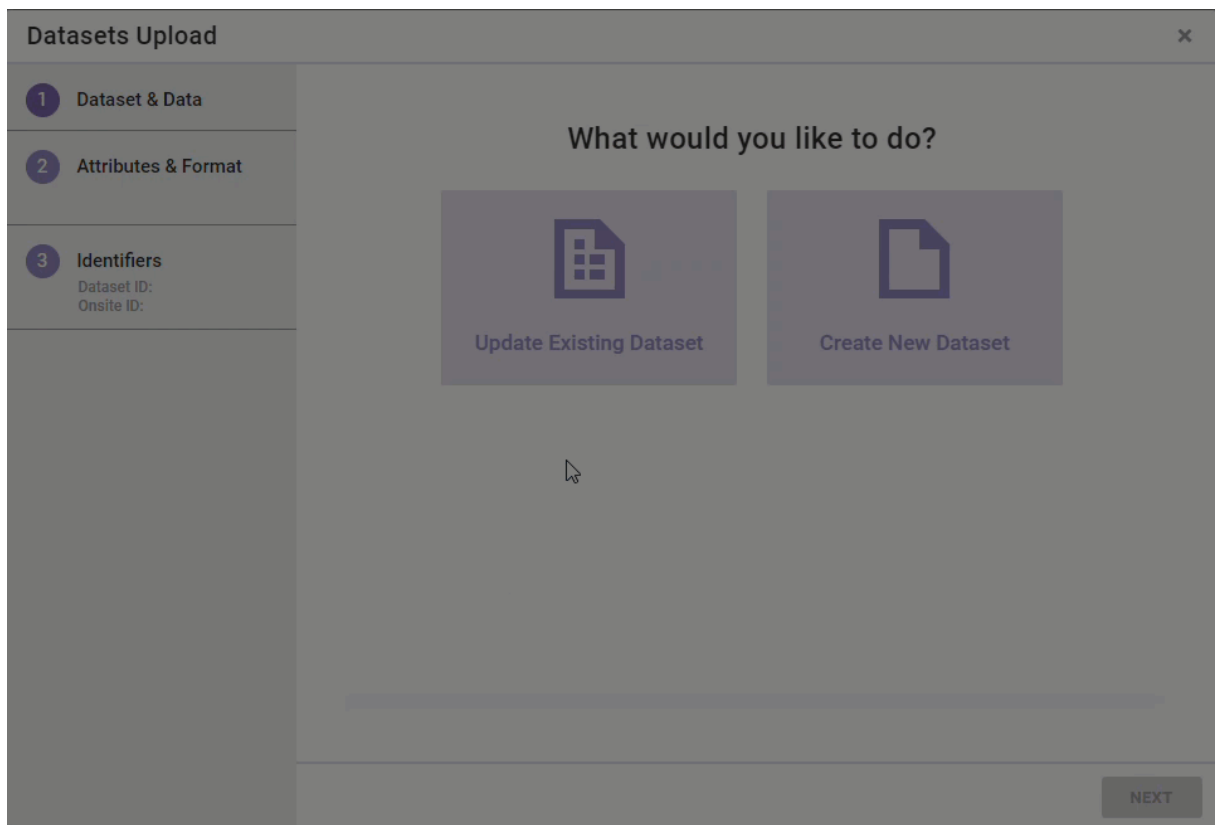
Using the Datasets Upload Wizard for a Partial Update

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**.

Datasets Upload ×


1 Dataset & Data
Dataset: VIP_Members
File: VIP_Members_2023.csv
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

Is this a partial or full update?




Partial Update
For adding or updating select rows



Full Update
For replacing rows and adding additional rows or columns

BACK
➔
NEXT

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

 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.

Datasets Upload ×

1 Dataset & Data
Dataset: VIP_Members
File: VIP_Members_2023.csv
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

Select your file for "VIP_Members"

Drag a file here or [browse](#) for a file to upload.

Reminder: Monetate accepts email addresses, phone numbers, street addresses and most other forms of personally identifiable information provided that you have notified Monetate of the types of PII that you are uploading to the Monetate platform. Monetate does not accept social security numbers, any information of or relating to an individual's health (PHI), or any Payment Card Industry information (PCI). [?](#)

	A	B	C	D	E
1	cust_id	email_subscriber	LTV	gender	recent_viewed_products
2	111	0	\$2300.45	Male	1481478
3	112	1	\$76813.81	Female	1476845
4	113	1	\$87623.12	Female	685387031
5	114	0	\$2346.45	Male	1482289

BACK
NEXT

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
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

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."

ID Collector

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

CUSTOMER ID

Don't have an ID Collector?

CREATE ID COLLECTOR

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**.

Datasets Upload [Close]

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

Summary & Confirm

"VIP_Members" Summary

We have finished creating your "VIP_Members" dataset. Double check your dataset configuration and then click the "Finish" button.

Name	VIP_Members	Attributes
Dataset Identifier	customerId	1. customerId TEXT 2. Lifecycle_State TEXT 3. Engagement_State TEXT 4. Rewards_Enrolled TRUE/FALSE 5. Lifetime_Product_Sales NUMBER
On-site Identifier	Customer ID	

BACK  **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.



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.

Datasets Upload

1 Dataset & Data
Dataset: VIP_Members_2022
Update Type: Full Update

2 Attributes & Format

1. User_ID	TEXT
2. Gender	TEXT
3. First Order Date	NUMBER
4. Customer Since	NUMBER
5. Interests	TEXT
6. High Value	TRUE/FALSE
7. Customer Lifetime ...	TEXT
8. Channel of Last Or...	TEXT
9. Average Order Value	NUMBER
10. Country	TEXT
11. Age	NUMBER
12. Propensity to Buy	TEXT

Identifiers
Dataset ID: User_ID
Onsite ID: internal_id

Uploading **VIP_Members_2023_v4.csv** **CHOOSE NEW FILE**

File Update Error
Full updates must include the previous columns.

We found the following updates when parsing your dataset: **1 Missing** **2 Added**

You're missing the follow columns:

Propensity to Buy

User_ID	Gender	First Order Date	Customer Since	Interests	High Value	Customer Lifetime Value
11133759	Unknown	20120730	20120730	Sports	TRUE	0
11133760	Unknown	20130730	20130730	Art	TRUE	7899.78
11133761	Female	20120730	20120730	Art	TRUE	7899.78
11133762	Male	20130730	20130730	Sports	TRUE	1074.22
11133763	Female	20130730	20130730	Gardening	TRUE	598.41
11133764	Male	20130729	20130729	Sports	FALSE	770.59
11133765	Male	20120730	20120730	Gardening	FALSE	70.8
11133766	Female	20130930	20130930	Art	FALSE	0

NEXT

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.

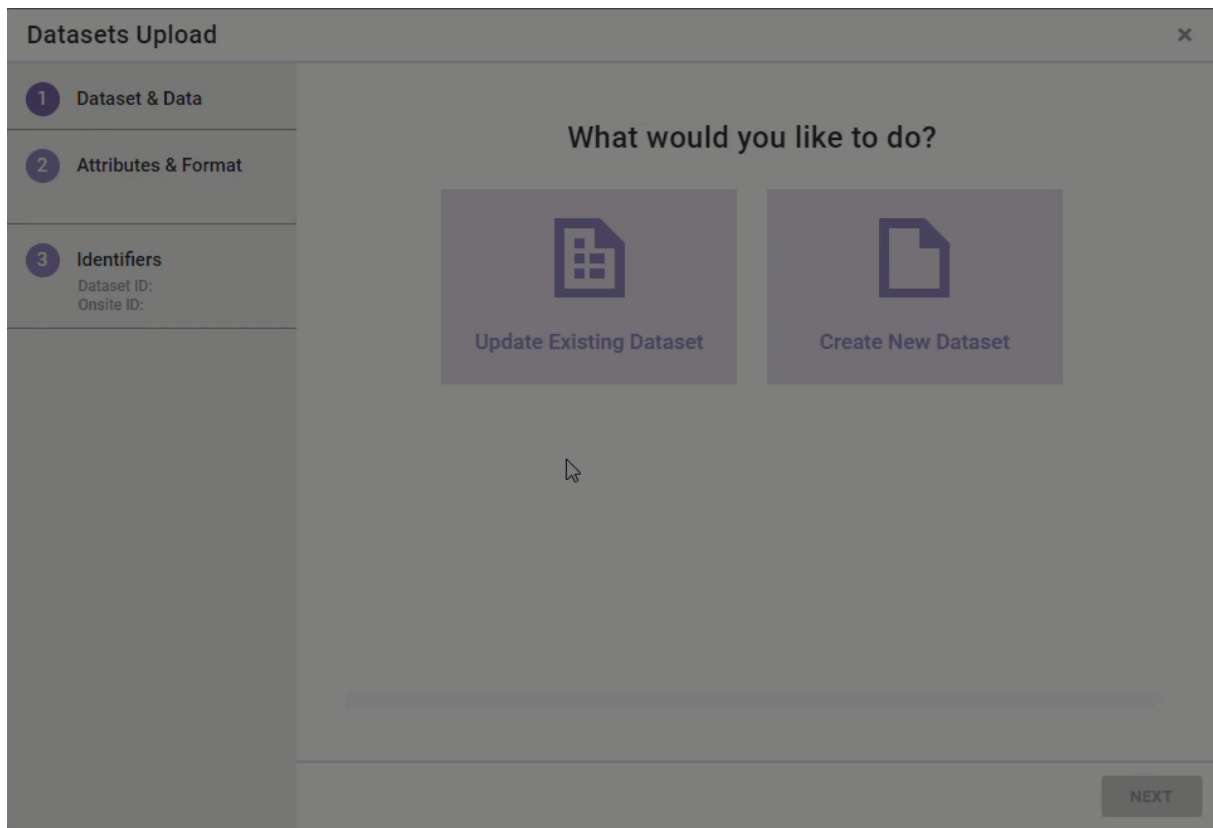
monetate.mybigcommerce.com PROD

DASHBOARD EXPERIENCES AUDIENCE EXPLORER COMPONENTS DATASETS ANALYTICS

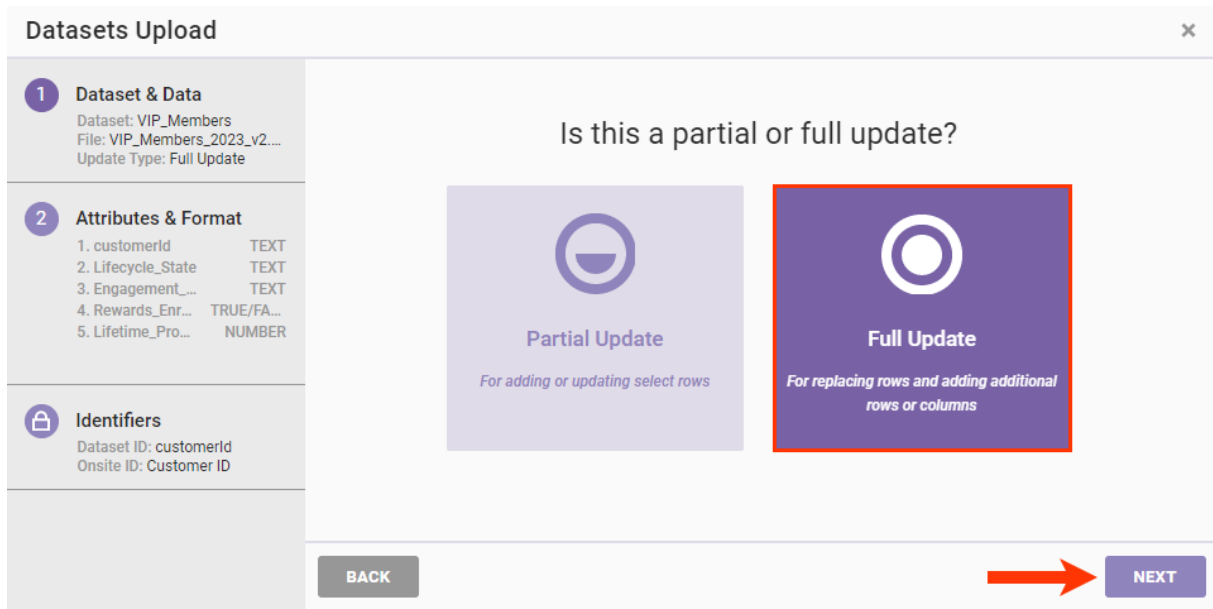
Customer Datasets **UPLOAD DATA**

SORT BY NAME **Current Updates**

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**.



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.

Datasets Upload ✕

1 Dataset & Data
Dataset: VIP_Members
Update Type: Full Update

2 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

Select your file for "VIP_Members"

Drag a file here or [browse](#) for a file to upload.

Reminder: Monetate accepts email addresses, phone numbers, street addresses and most other forms of personally identifiable information provided that you have notified Monetate of the types of PII that you are uploading to the Monetate platform. Monetate does not accept social security numbers, any information of or relating to an individual's health (PHI), or any Payment Card Industry information (PCI). [?](#)

	A	B	C	D	E
1	cust_id	email_subscriber	LTV	gender	recent_viewed_products
2	111	0	\$2300.45	Male	1481478
3	112	1	\$76813.81	Female	1476845
4	113	1	\$87623.12	Female	685387031
5	114	0	\$2346.45	Male	1482289

BACK
NEXT

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.

Datasets Upload

Dataset & Data

Dataset: VIP_Members
File: VIP_Members_2023_v2....
Update Type: Full Update

Attributes & Format

- customerId TEXT
- Lifecycle_State TEXT
- Engagement_... TEXT
- Rewards_Enr... TRUE/FA...
- Lifetime_Pro... NUMBER
- Propensity_to... TEXT

Identifiers


Dataset ID: customerId
Onsite ID: Customer ID

We found 6 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
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
6.	INCLUDE III	Propensity_to_buy	AS	TEXT

BACK  **NEXT**

- 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: Full Update

Attributes & Format

- customerId TEXT
- Lifecycle_State TEXT
- Engagement_... TEXT
- Rewards_Enr... TRUE/FA...
- Lifetime_Pro... NUMBER
- Propensity_to... TEXT

Identifiers
Dataset ID: customerId
Onsite ID: Customer ID

Dataset Identifier

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

CUSTOMERID

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."


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](#)



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**.

Datasets Upload

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

Attributes & Format

- customerId TEXT
- Lifecycle_State TEXT
- Engagement_... TEXT
- Rewards_Enr... TRUE/FA...
- Lifetime_Pro... NUMBER
- Propensity_to... TEXT

Identifiers
Dataset ID: customerId
Onsite ID: Customer ID

Summary & Confirm

"VIP_Members" Summary

We have finished creating your "VIP_Members" dataset. Double check your dataset configuration and then click the "Finish" button.

Name	VIP_Members	Attributes
Dataset Identifier	customerId	1. customerId TEXT
On-site Identifier	Customer ID	2. Lifecycle_State TEXT
		3. Engagement_State TEXT
		4. Rewards_Enrolled TRUE/FALSE
		5. Lifetime_Product_Sales NUMBER
		6. Propensity_to_buy TEXT

BACK
➔
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.