

Update a Customer Dataset via SFTP

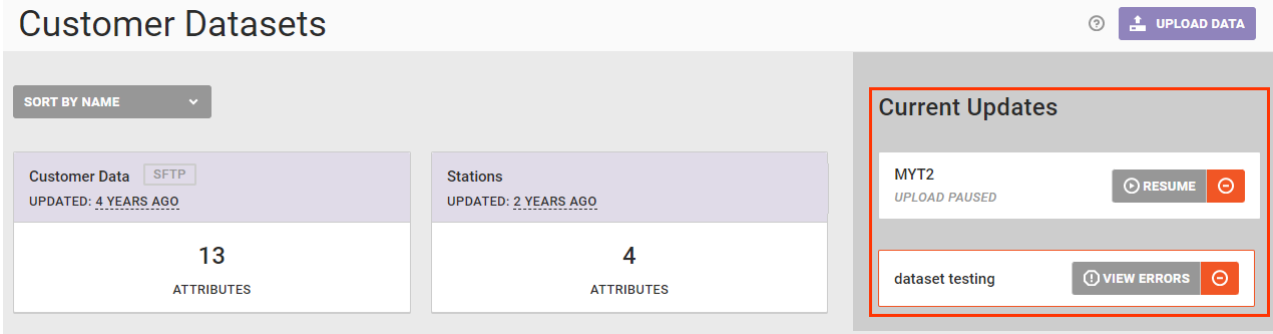
! This content is only for clients with **Product Data** and **Customer Data** options in the **DATASETS** menu in the top navigation bar. If no menu options appear when you click **DATASETS**, then this content doesn't apply to your account. Instead, see the [alternate version of this documentation](#).

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

How Automatic Updates Work

Any current dataset created with the Datasets Upload 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 Monetate's SFTP server, it automatically updates the dataset and all associated experiences.

If the update failed, you'll see an alert in the Current Updates column on the Customer Datasets list page.



You can perform two types of updates for a customer 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

i You cannot add columns, also called attributes or fields, to a dataset through a partial update sent via SFTP. See [Update or Replace a Customer Dataset](#) for the steps to add attributes using the Datasets Upload wizard.

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

i 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. You can access these files from the Update History modal that you open from the additional actions menu on the dataset's details page.

UPLOAD DATE	FILENAME	UPLOAD TYPE	SOURCE	COLUMN COUNT	ROW COUNT	ERROR COUNT	PROCESS TIME
10 months ago	18962-testDS.csv	Full	SFTP	3	Failed	0	0 secs
10 months ago	18962-testDS.csv	Full	SFTP	3	Failed	0	1 sec
10 months ago	testDS.csv	Full	Wizard	3	5	0	0 secs
10 months ago	testDS.csv	New	Wizard	2	5	0	0 secs

Monetate periodically cleans up the history folder. However, all files remain archived for a minimum of 24 hours.

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 Monetate by selecting **Sites** from the settings menu in the platform.

The screenshot shows the Monetate dashboard interface. At the top right, there is a settings gear icon highlighted with a red box. A dropdown menu is open, showing options under 'ACCOUNT' and 'CONTENT'. The 'Sites' option under 'ACCOUNT' is highlighted with a purple bar and a red arrow points to it. Other options in the 'ACCOUNT' menu include API Documentation, Users, Script Revision, Integration, Compliance Tools, Default Metrics, Email, and Seasonality. The 'CONTENT' menu includes Experience Tags. The dashboard background shows analytics for 'Auto Personalization experience' (1 experience), 'Dynamic Test experiences' (8 Standard), and 'Standard' (45 100% E).

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

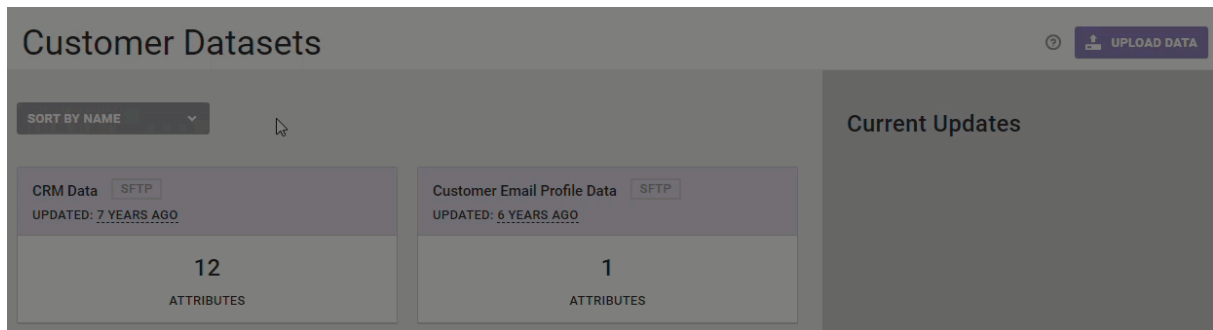
There are two file-drop directories:

- `/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 dataset's specific ID. You can find this information in the platform by following these steps:

1. Click **DATASETS** in the top navigation bar, and then select **Customer Data**.
2. Find the dataset you want to update on the Customer Datasets list page, and then place the mouse pointer in the upper-right corner of the dataset's tile to reveal the additional options menu.



3. Click **Manage Auto Updates** to open the Configure Automatic Updates (SFTP) modal.

Configure Automatic Updates (SFTP) for VIP_Members_2022
✕

SFTP Directories

Partial Updates: /datasets/partial

Full Updates: /datasets/full

File Name Prefix: 60804-

File Name Example: 60804-example.csv

SFTP Connection Settings

Server URL: sftp://sftp.monetate.net

[Configure your SFTP credentials](#)

SFTP Update Queue

ORDER	FILE NAME	TYPE	PROCESSING BEGINS	CANCEL (CANCEL ALL)
<i>No files are currently queued.</i>				

The numeric prefix that appears in the SFTP Directories table is the dataset ID you use in place of `{datasetid}` in the filename.

Configure Automatic Updates (SFTP) for VIP_Members_2022
✕

SFTP Directories

Partial Updates: /datasets/partial

Full Updates: /datasets/full

File Name Prefix: 60804-

File Name Example: 60804-example.csv

SFTP Connection Settings

Server URL: sftp://sftp.monetate.net

[Configure your SFTP credentials](#)

SFTP Update Queue

ORDER	FILE NAME	TYPE	PROCESSING BEGINS	CANCEL (CANCEL ALL)
<i>No files are currently queued.</i>				



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.

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).