

# Update a Custom List Dataset

You have multiple options to update a custom list dataset in the Monetate platform.



If the custom list dataset you update is associated with any experience, action condition, or recommendation filter, the platform uses the current list of PIDs, not the list as it existed at the time it was associated.

## Using the Upload Data Wizard

The Upload Data wizard has options to either drag and drop a file directly into it or to input a URL to a dataset file that you store on Amazon S3. Regardless of which of these two upload options you select, the file that you use must be in the CSV or TSV format and cannot contain a header row.

### Uploading a File Directly

Follow these steps to upload a custom list update file within the Monetate platform.

1. Click **DATASETS** in the top navigation bar, and then, if necessary, select **Product Data**.
2. Select **Custom Lists** from **View** on the Datasets list page.

The screenshot shows the 'Datasets' page in the Monetate platform. At the top, there is a 'Product Catalogs' header with a 'CREATE DATASET' button. Below this is a table of datasets. The 'View' dropdown menu is open, showing 'Product Catalogs' selected. A red arrow points to the dropdown arrow. The table has columns for NAME, UNIQUE ID, CONNECTED DOMAINS, LAST UPDATED, and UPLOAD. The rows represent different product catalogs with their respective unique IDs, domain counts, and last update status.

NAME	UNIQUE ID	CONNECTED DOMAINS	LAST UPDATED	UPLOAD
Product_H PRODUCT Custom Lists	id	0 Connected domains	7 HOURS AGO	
Product_H PRODUCT CATALOG Behavioral Triggers Extracts	id	0 Connected domains	UPDATE FAILED	
Product_H22025 PRODUCT CATALOG	id	0 Connected domains	WAITING FOR YOU TO PROVIDE DATA	
Product_H12024 PRODUCT CATALOG	id	1 Connected domains	8 DAYS AGO	


3. Find the dataset that you want to update, click the upload icon that appears to the far right of its entry, and then select **Data File Upload**.


## Datasets

### Custom Lists

CREATE DATASET

View: CUSTOM LISTS spring

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Spring_Summer CUSTOM LIST	value	9 DAYS AGO	 UPLOAD DATA: API Info SFTP Info Data File Upload



4. Select the type of update you want to perform, and then click **NEXT**.

## Upload Data to Spring\_Summer

### 1 Partial or Full Update? EDITING

Would you like to only update select rows or replace the entire dataset?

**Partial Update**  
To add or update select rows

**Full Update**  
To replace the entire dataset

**NEXT** 

### 2 Manual File Upload or Pre-signed S3 URL?

5. Select **Manual File Upload** and then click **NEXT**.

## Upload Data to Spring\_Summer



### ✓ Partial or Full Update? [EDIT](#)



#### Partial Update

To add or update select rows



### 2 Manual File Upload or Pre-signed S3 URL? [EDITING](#)

How would you like to update the dataset?



#### Manual File Upload

Upload using a local file



#### Upload File Using Pre-signed S3 URL

Upload a file using your pre-signed S3 URL

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NEXT 

### 3 Upload Your File or Paste Your Pre-signed S3 URL

6. Drag and drop the file into the wizard.

## Upload Data to Spring\_Summer ✕

✓ Partial or Full Update? [EDIT](#)


✓ **Partial Update**  
*To add or update select rows*

✓ Manual File Upload or Pre-signed S3 URL? [EDIT](#)

✓ **Manual File Upload**  
*Upload using a local file*

**3** Upload Your File or Paste Your Pre-signed S3 URL [EDITING](#)

Drop Your File Here



YOU CAN ALSO [BROWSE](#) FOR A FILE TO UPLOAD

Max File size: 100 MB | Accepted types: CSV, TSV. Files with other types of delimiters such as the pipe character ("|") may not be properly recognized.

[BACK](#) [FINISH](#)

7. Click **FINISH** after the file is uploaded.

## Upload Data to Spring\_Summer ✕

✓ Partial or Full Update? [EDIT](#)


✓ **Partial Update**  
*To add or update select rows*

✓ Manual File Upload or Pre-signed S3 URL? [EDIT](#)


✓ **Manual File Upload**  
*Upload using a local file*

**3** Upload Your File or Paste Your Pre-signed S3 URL [EDITING](#)

Upload Complete



*Spring\_Summer\_v3.csv uploaded successfully. High fives.*

[BACK](#) [FINISH](#) 

Monetate closes the Upload Data wizard. A message briefly appears that informs you that the file was successfully uploaded. When the Custom Lists view of the Datasets list page loads, **PENDING** appears in the LAST UPDATED column for the dataset you updated.

## Uploading a File Using an Amazon S3 URL

Follow these steps to update a custom list dataset by uploading a file using an Amazon S3 pre-signed URL.

1. Generate the pre-signed URL for the file you want to upload.



Refer to [Sharing objects using presigned URLs](#) in the Amazon Simple Storage Service (S3) user documentation for more information about generating a URL for this purpose.

2. Click **DATASETS** in the top navigation bar, and then, if necessary, select **Product Data**.
3. Select **Custom Lists** from **View** on the Datasets list page.

The screenshot shows the 'Product Catalogs' section of the Monetate interface. At the top, there are links for 'DEFAULT CATALOG ASSIGNMENTS' and a 'CREATE DATASET' button. Below this is a 'View:' dropdown menu currently set to 'PRODUCT CATALOGS', with a red arrow pointing to it. The dropdown menu is open, showing options: 'Product Catalogs', 'Recommendations', 'Customer Attributes', 'Custom Lists', 'Offline Purchases', and 'Behavioral Triggers Extracts'. Below the dropdown is a table with columns: NAME, UNIQUE ID, CONNECTED DOMAINS, LAST UPDATED, and UPLOAD. The table contains five rows of product catalog data.

NAME	UNIQUE ID	CONNECTED DOMAINS	LAST UPDATED	UPLOAD
Product_H PRODUCT	id	0 Connected domains	7 HOURS AGO	
Product_H PRODUCT CATALOG	id	0 Connected domains	UPDATE FAILED	
Product_H22025 PRODUCT CATALOG	id	0 Connected domains	WAITING FOR YOU TO PROVIDE DATA	
Product_H12024 PRODUCT CATALOG	id	1 Connected domains	8 DAYS AGO	


4. Find the dataset that you want to update, click the upload icon that appears to the far right of its entry, and then select **Data File Upload**.


## Datasets

### Custom Lists

CREATE DATASET

View: CUSTOM LISTS spring

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Spring_Summer CUSTOM LIST	value	9 DAYS AGO	 UPLOAD DATA: API Info SFTP Info Data File Upload



5. Select the type of update you want to perform, and then click **NEXT**.


### Upload Data to Spring\_Summer

1 Partial or Full Update? EDITING

Would you like to only update select rows or replace the entire dataset?

**Partial Update**  
To add or update select rows

**Full Update**  
To replace the entire dataset

**NEXT** 

2 Manual File Upload or Pre-signed S3 URL?

6. Select **Upload File Using Pre-signed S3 URL**, and then click **NEXT**.

## Upload Data to Spring\_Summer



### ✓ Partial or Full Update? [EDIT](#)



#### Partial Update

To add or update select rows



### 2 Manual File Upload or Pre-signed S3 URL? [EDITING](#)

How would you like to update the dataset?



#### Manual File Upload

Upload using a local file



#### Upload File Using Pre-signed S3 URL

Upload a file using your pre-signed S3 URL

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NEXT 

### 3 Upload Your File or Paste Your Pre-signed S3 URL

7. Paste the Amazon S3 URL into the field, and then click **FINISH**.

### Upload Data to Spring\_Summer ✕

✓ Partial or Full Update? [EDIT](#)

✓ **Partial Update**   
*To add or update select rows*


✓ Manual File Upload or Pre-signed S3 URL? [EDIT](#)

✓ **Upload File Using Pre-signed S3 URL**  
*Upload a file using your pre-signed S3 URL*

**3** Upload Your File or Paste Your Pre-signed S3 URL [EDITING](#)

Paste your generated S3 URL in either the `https://s3.amazonaws.com/[bucket_name]/` or `https://[bucket_name].s3.amazonaws.com/` formats.

`https://monetate.s3.us-east-2.amazonaws.com/Spring_Summer_v2.csv?response-conten...`

BACK FINISH 

The Upload Data wizard closes and Monetate ingests the file. When the Custom Lists view of the Datasets list page loads, a message briefly appears that informs you that the file was successfully uploaded from the Amazon S3 URL. Additionally, **PENDING** appears in the LAST UPDATED column for the dataset you updated.

## Using the Update Custom List Field

If the custom list dataset that you need to update is relatively short, or if you need only to add or remove a manageable number of product IDs (PIDs), then you can perform the update in the Monetate platform without uploading a file.

1. Click **DATASETS** in the top navigation bar, and then, if necessary, select **Product Data**.
2. Select **Custom Lists** from **View** on the Datasets list page.




# Datasets








## Product Catalogs

DEFAULT CATALOG ASSIGNMENTS

CREATE DATASET

View: **PRODUCT CATALOGS** 

Search by name

NAME	UNIQUE ID	CONNECTED DOMAINS	LAST UPDATED	UPLOAD
Product_H PRODUCT Recommendations	id	0 Connected domains	7 HOURS AGO	
Product_H PRODUCT Customer Attributes	id	0 Connected domains	UPDATE FAILED	
Product_H PRODUCT Custom Lists	id	0 Connected domains	WAITING FOR YOU TO PROVIDE DATA	
Product_H PRODUCT Offline Purchases	id	0 Connected domains	8 DAYS AGO	
Product_H PRODUCT CATALOG Behavioral Triggers Extracts	id	1 Connected domains	8 DAYS AGO	
Product_H22025 PRODUCT CATALOG	id	0 Connected domains	8 DAYS AGO	
Product_H12024 PRODUCT CATALOG	id	0 Connected domains	8 DAYS AGO	

3. Click the name of the dataset that you want to edit.
4. Add, edit, or remove PIDs in the text field, and then click **UPDATE**.

monetate.mybigcommerce.com PROD DASHBOARD EXPERIENCES AUDIENCES COMPONENTS DATASETS ANALYTICS

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# Spring\_Summer

UPDATE DATA

Update Custom List Update History

LAST UPDATED A FEW SECONDS AGO Rows: 40 ARCHIVE DATASET

Product IDs can be entered either as comma-separated values or one product ID per line.

You may enter a maximum of 5,000 product IDs.

21201  
21211  
21212  
21213  
21215  
21217  
21218  
21219  
21321

UPDATE

A message briefly appears that informs you that the dataset was successfully updated, and the row count to the left of **ARCHIVE DATASET** reflects the changes you made.

In the table on the **Update History** tab, this type of update has **CUSTOM LIST WIZARD** in the SOURCE column and is considered a full update.



Monetate retains a custom list dataset's files for 180 days from the date a file was uploaded; a file was created as a result of using the **Input a list of product IDs** method in the wizard; or a file was created as a result of updates made using the field on the **Update Custom List** tab. Once a file is out of this retention period, it still appears on the dataset's **Update History** tab, but you cannot download it.

[BACK TO DATASETS](#)

# Spring\_Summer

UPLOAD DATA

Update Custom List

Update History

LAST UPDATED A FEW SECONDS AGO

Rows: 40

ARCHIVE DATASET



Heads up! Updates that you make via the API are not reflected on this page. Check the API logs in your system for the API update records.

## Update History

UPLOAD DATE	FILENAME	SOURCE	USER	UPDATE TYPE	ROW COUNT
✓ FEB 13 2024, 9:02 AM	<a href="#">Spring_Summer_2024_v2.csv</a>	CUSTOM LIST WIZARD	swalken@monetate.com	Full	40
✓ FEB 12 2024, 2:06 PM	<a href="#">Spring_Summer_2024.csv</a>	WIZARD	swalken@monetate.com	Full	28
✓ JUL 10 2023, 11:32 AM	Spring_Summer	CUSTOM LIST WIZARD	twavelle@monetate.com	Full	37