

Update a Custom List Dataset



This content is only for clients with the one-click **DATASETS** option in the top navigation bar. If you click **DATASETS** and see **Product Data** and **Customer Data** listed as menu options, then this content doesn't apply to your account. Instead, see the [alternate version of this documentation](#).

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.

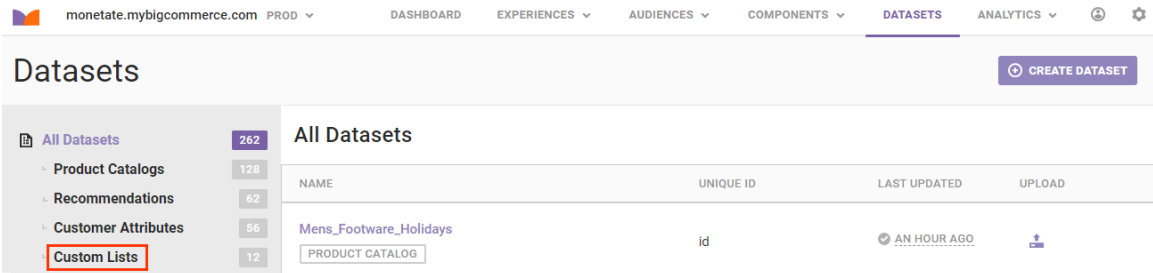
Using the Upload Data Wizard

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 click **Custom Lists** in the left-hand category listings on the All Datasets list page.





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

Datasets

CREATE DATASET

- All Datasets 265
 - Product Catalogs 128
 - Recommendations 64
 - Customer Attributes 56
 - Custom Lists 12

Custom Lists

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Spring_Summer CUSTOM LIST	value	33 MINUTES AGO	
BOGO Eligible Items CUSTOM LIST	value	33 MINUTES AGO	

UPLOAD DATA:
API Info
SFTP Info
Data File Upload

3. 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?

4. 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

BACK

NEXT 

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

5. 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

6. 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 datasets list page loads, **PENDING** appears in the LAST UPDATED column for the dataset you updated.

The screenshot shows the 'Datasets' page with a sidebar on the left containing a list of categories: All Datasets (265), Product Catalogs (128), Recommendations (64), Customer Attributes (56), and Custom Lists (12). The main content area is titled 'Custom Lists' and contains a table with the following data:

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Spring_Summer CUSTOM LIST	value	PENDING	📄
BOGO Eligible Items CUSTOM LIST	value	🕒 3 MONTHS AGO	📄

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 click **Custom Lists** in the left-hand category listings on the All Datasets list page.

The screenshot shows the 'Datasets' page with the top navigation bar containing 'monetate.mybigcommerce.com PROD', 'DASHBOARD', 'EXPERIENCES', 'AUDIENCES', 'COMPONENTS', 'DATASETS', and 'ANALYTICS'. The sidebar on the left shows the following categories: All Datasets (262), Product Catalogs (128), Recommendations (62), Customer Attributes (56), and Custom Lists (12). The 'Custom Lists' category is highlighted with a red box. The main content area is titled 'All Datasets' and contains a table with the following data:

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Mens_Footware_Holidays PRODUCT CATALOG	id	🕒 AN HOUR AGO	📄



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

Datasets

CREATE DATASET

- All Datasets 265
- Product Catalogs 128
- Recommendations 64
- Customer Attributes 56
- Custom Lists 12

Custom Lists

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Spring_Summer CUSTOM LIST	value	33 MINUTES AGO	
BOGO Eligible Items CUSTOM LIST	value	33 MINUTES 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 **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

BACK

NEXT 

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

6. 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 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.

monetate.mybigcommerce.com PROD ▾ DASHBOARD EXPERIENCES ▾ AUDIENCES ▾ COMPO ✓ Successfully uploaded via pre-signed URL. ✕

Datasets CREATE DATASET

All Datasets 265

- Product Catalogs 128
- Recommendations 64
- Customer Attributes 56
- Custom Lists 12**

Custom Lists

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Spring_Summer <small>CUSTOM LIST</small>	value	PENDING	
BOGO Eligible Items <small>CUSTOM LIST</small>	value	🕒 3 MONTHS AGO	

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 click **Custom Lists** in the left-hand category listings on

the All Datasets list page.

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

Datasets

CREATE DATASET

- All Datasets 262
- Product Catalogs 128
- Recommendations 62
- Customer Attributes 56
- Custom Lists 12**

NAME	UNIQUE ID	LAST UPDATED	UPLOAD
Mens_Footware_Holidays	id	AN HOUR AGO	📄

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

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

< BACK TO DATASETS

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.

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	Spring_Summer_2024_v2.csv	CUSTOM LIST WIZARD	swalken@monetate.com	Full	40
FEB 12 2024, 2:06 PM	Spring_Summer_2024.csv	WIZARD	swalken@monetate.com	Full	28
JUL 10 2023, 11:32 AM	Spring_Summer	CUSTOM LIST WIZARD	twavelle@monetate.com	Full	37