

Onboarding Customer Data

To get started with data onboarding, you must expose a customer identifier on your website, which Monetate can then capture and use this identifier for segmentation.

Exposing a Customer ID on Your Site

You can expose a customer ID in a cookie, in a JavaScript variable, or with HTML. This ID must correlate with and establish a relationship with a person, not a browser or device.

For example, when Clayton Powell logs into your site, its eCommerce platform stores Clayton's customer ID in a cookie: `ee8372ls`. Since your site is configured to capture the customer ID in a cookie every time a customer logs in, you can then configure Monetate to look for this identifier, called the on-site ID, on your site on each page load.

Three Common Ways to Expose the Customer ID

Here are three commonly used methods for exposing the customer ID.

When a customer logs in — When a customer logs in establish their profile, access a wish list feature, add something to cart, or make a purchase, they're identifying themselves as a person to your site.

When a customer signs up for their email preferences — When a customer signs up for your company's email newsletter or configures their email preferences, they're providing you with their identity, typically an email address. If your email service provider hosts this form, then they often drop a subscriber ID into a cookie. This ID is usually present in your email subscriber database, which then allows you to upload any of your email subscriber analytics to the platform.

When a customer contacts online customer service — When a customer initiates a chat or fills out a customer service form on your site, it's another opportunity to identify the customer and expose a customer ID to Monetate. As soon as the customer enters an email address or another key identifier, such as a phone number, you can configure your service platform to expose a customer ID somewhere on your site.



Monetate remembers a customer ID after the first observation and retains that connection between the customer ID and the Monetate ID even when the customer ID is no longer present on subsequent pages or during subsequent sessions.

Use a Value Exposed on All Channels

Monetate recommends that you expose the customer identifier for a single person as the same value on as many channels as you can. For example, if Clayton Powell visits your mobile site and logs in, he should have a customer identifier exposed: `ee8372ls`.

If you want to create personalization experiences for your desktop site, ensure that same customer identifier is also available on your desktop site. Therefore, when Clayton logs into the desktop site, he's assigned the same

identifier as on the mobile site: ee8372Is .

Uploading a Dataset

To use offline customer data in experiences, you must upload it in a dataset using the platform's datasets upload wizard. See [Dataset Upload Requirements](#) for the required information and formatting for a dataset of customer data. [Upload a Customer Attributes Dataset](#) contains the steps for uploading the file to the platform.

Set Up an On-Site ID Target

To use customer datasets, you must set up an on-site ID target, which allows Monetate to remember your customers for future targeting and segmentation.

In the Datasets Upload wizard you're prompted to select an on-site ID from options available within the wizard or to create one using Target Builder.



The ability to use Target Builder to create an on-site identifier is only accessible from the Datasets Upload wizard. No option for on-site identifier is available if you launch Target Builder from any other place in the platform.

Datasets Upload

Dataset & Data

Dataset: VIP_Members_2022
File: VIP_Members_2022.csv

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 Identifier

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

USER_ID

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 "User_ID" is found on your website.

INTERNAL_ID [REFRESH LIST](#)

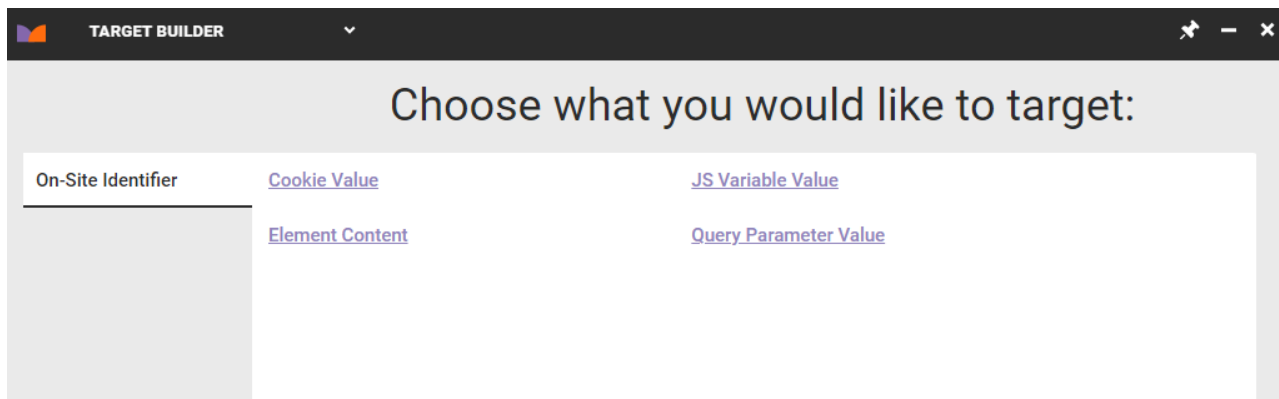
Don't have an ID Collector?

[CREATE ID COLLECTOR](#)

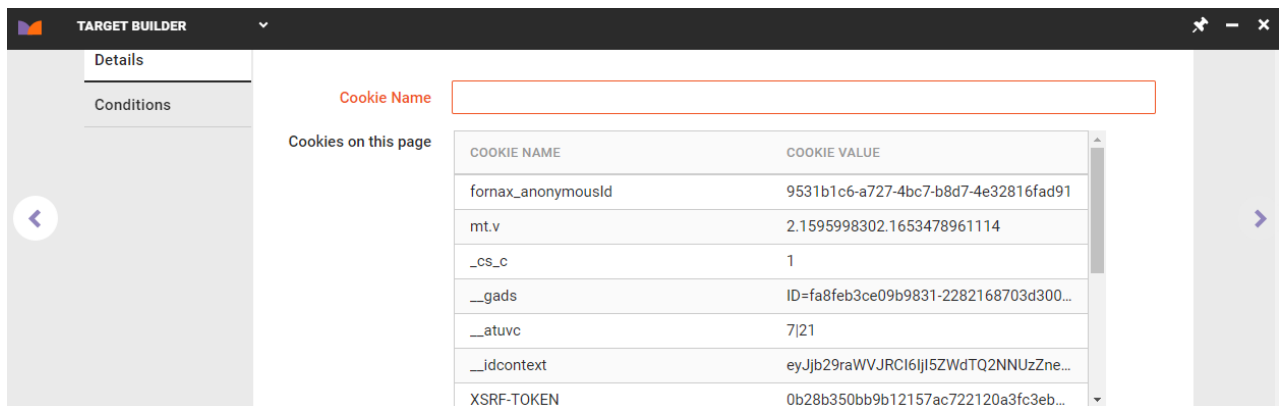
Continuing this example, the Customer ID is exposed as the value of a cookie named "cust_id."

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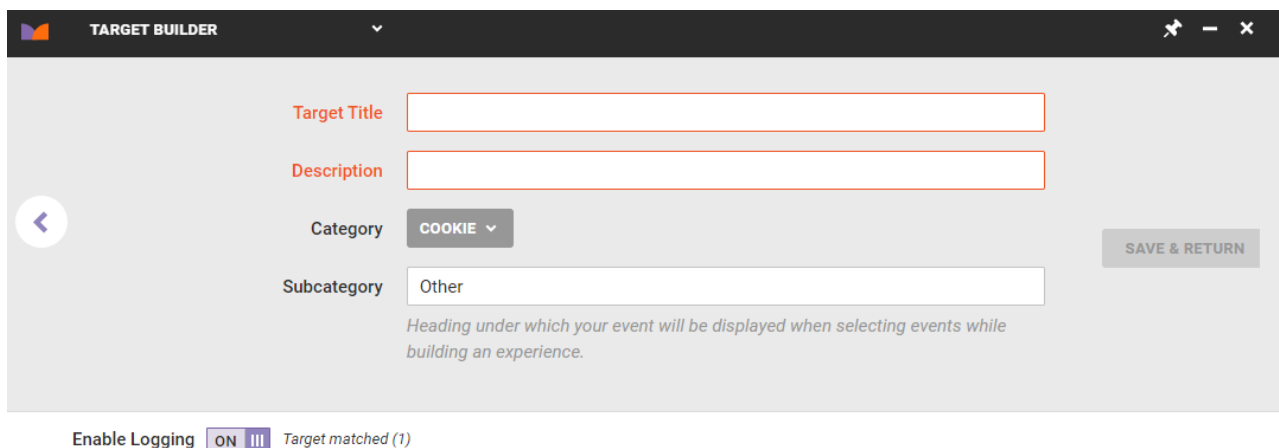
Click the target type you want to use for the on-site identifier. You can create it based on a cookie value, the content of an HTML element, the value of a JavaScript variable, or a query parameter value.



Next, select the element or input the cookie name, JavaScript variable name or the query parameter name, depending on the target type. If you're using a cookie value for the on-site identifier that you're building, Target Builder includes a list of cookies on the page of your site for your reference. When you're finished, click the forward arrow.



Name the on-site identifier target, and then enter a description. Click **SAVE & RETURN** to return to the Datasets Upload wizard.



You can now select in the wizard the on-site identifier that you just built so that you can then continue creating the dataset.



If the on-site identifier you created doesn't appear in **SELECT ON-SITE ID**, click **REFRESH LIST**.



Additional Considerations

After you've satisfied all the prerequisites, you must consider a few other things before you begin to build an experience with your customer data.

Consider Your Sources

The customer data that you've included in the dataset helps to determine the type of experience you will build. Does the dataset include CRM data, email data, point of sale data, or a combination of all three?

Look at Business Goals

What business goals do you want to achieve with an experience that uses the customer data? Do you want to drive down returns, identify high-value customers, or bolster sales of high-margin products?

Estimate Audience Size

Before you launch an experience with the data, have an idea of the relative size of your audience. You can determine that information by [creating an experience that uses a Do Nothing action](#). Run this experience until you have enough data to make informed decisions about the traffic a personalization experience may receive. After this information-gathering trial, you can then build an experience targeting the audiences that you identified with the Do Nothing experience.