

# Use AgilOne in 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 the [alternate version of this documentation](#).

Within the platform you can access the Create Dataset Schema wizard to upload a CSV file and determine various field types to create a customer dataset schema, after which you can then upload a full file to create the dataset.

With AgilOne integration, you can skip the process of defining field types for customer datasets by using its predefined schema and uploading that CSV file to the platform via SFTP.

The headers of the CSV you upload *must* match those in the table, and the values entered must match the type listed. You can also download a [template](#).

Header	Field Type
customer_id	String
email	String
primary_organization	String
primary_store	String
primary_brand	String
closest_store	String
email_status	String
do_not_email	String
total_revenue_group	String
last_12_months_group	String
frequency_group	String
recency_days_group	String
average_discount_rate	String
customer_age	Number
customer_birth_month	Number
customer_gender	String
likelihood_to_buy	String
likelihood_to_engage	String

Header	Field Type
product_cluster	String
likelihood_to_convert	String
behavior_cluster	String
execution_id	Number

## Setting Up the Integration

Follow these steps to establish the integration with AgilOne.

1. Click the settings cog in the top navigation bar and then select **Integration**.
2. Click the **AgilOne** tab on the Integration page.

If the **AgilOne** tab doesn't appear on the Integration page, then this feature isn't activated for your account. Contact your dedicated Customer Success Manager for assistance.

3. Click **INTEGRATE AGILONE NOW**.
4. Name the AgilOne dataset and then click **INTEGRATE**.

The dataset name must begin with a letter and contain only letters, numbers, and underscores.

Now that you have integrated AgilOne, you're ready to upload the dataset schema via SFTP.

## Setting Up the SFTP Upload

Follow these steps to create SFTP user credentials for specifically for uploading AgilOne data.

You must have the Administrator user role in the Monetate platform to set up SFTP users on the **Sites** tab of the platform settings. Once created, SFTP permissions don't require a user role in the platform.

1. Click **CONFIGURE YOUR SFTP CREDENTIALS** on the **AgilOne** tab.
2. Click **CREATE SFTP USER** on the **Sites** tab of the Monetate platform settings.

3. Configure the user credentials.
  - a. Input a description for the SFTP user.
  - b. Select the authentication method.
  - c. Input the required credentials as determined by the authentication method you selected in the previous step.
    - If you selected **Password**, your password doesn't have to meet any format requirements.
    - If you selected **Public key**, then paste a RFC 4716-formatted OpenSSH public key into the field. See [Public Key Requirements](#) in [Manage SFTP Users](#) for more information.
  - d. Click **SAVE**.
4. Configure your SFTP client with the following information from the **Sites** tab:
  - **Host** – `sftp://sftp.monetate.net`
  - **Port** – `22`
  - **Protocol** – `SFTP`

You can now upload the CSV file containing the AgilOne schema to the `/datasets` directory using your SFTP client.

## Viewing the New Dataset

Once the upload is complete, you can view the newly created customer dataset by following these steps.

1. Click **DATASETS** in the top navigation bar, and then click **Customer Data**.
2. Find the customer dataset you created, and then click the dataset's name to view its details page.

The **Overview** tab of the dataset details page shows all the headers present in the CSV file you uploaded.

If the platform encountered an error during the upload, then a warning message appears in the Current Updates column on the Customer Datasets list page. Click **VIEW ERRORS** for more information.

See [Customer Dataset Details Page](#) to better understand the information you can find on and what actions you can take from the dataset's details page.