

# Use AgilOne Data in a Customer Attributes 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](#).

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 Attributes 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 Attributes 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

Header	Field Type
likelihood_to_buy	String
likelihood_to_engage	String
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 and then select **Integration**.

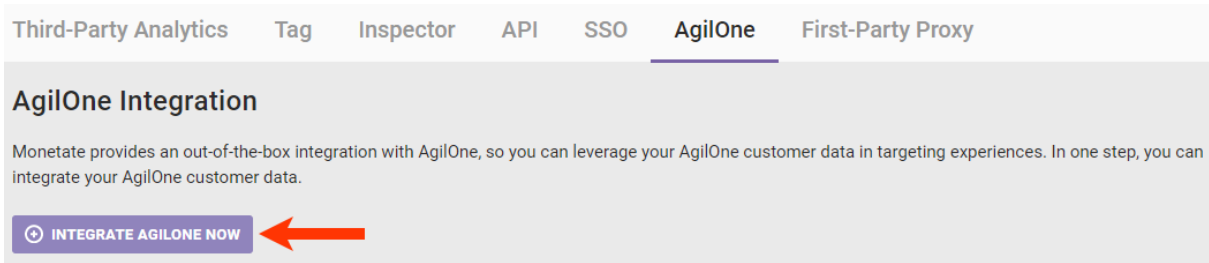
The screenshot shows the Monetate dashboard for 'monetate.mybigcommerce.com'. The top navigation bar includes 'DASHBOARD', 'EXPERIENCES', 'AUDIENCES', 'COMPONENTS', 'DATASETS', and 'ANALYTICS'. A settings cog icon is highlighted in the top right corner. A dropdown menu is open, showing options like 'ACCOUNT', 'Sites', 'API Documentation', 'Users', 'Script Revision', 'Integration' (highlighted with a red arrow), 'Compliance Tools', 'Default Metrics', 'Email', 'Seasonality', 'Engine Context', 'CONTENT', and 'Experience Tags'. The main dashboard area displays 'Showing experiences and account analytics from 30 DAYS' and features three cards: 'Auto Personalization experiences' (2), 'Dynamic Test experiences' (1), and 'Standard' (8). A table below shows 'METRIC' and 'VALUE' columns.

2. Click the **AgilOne** tab on the Integration page.

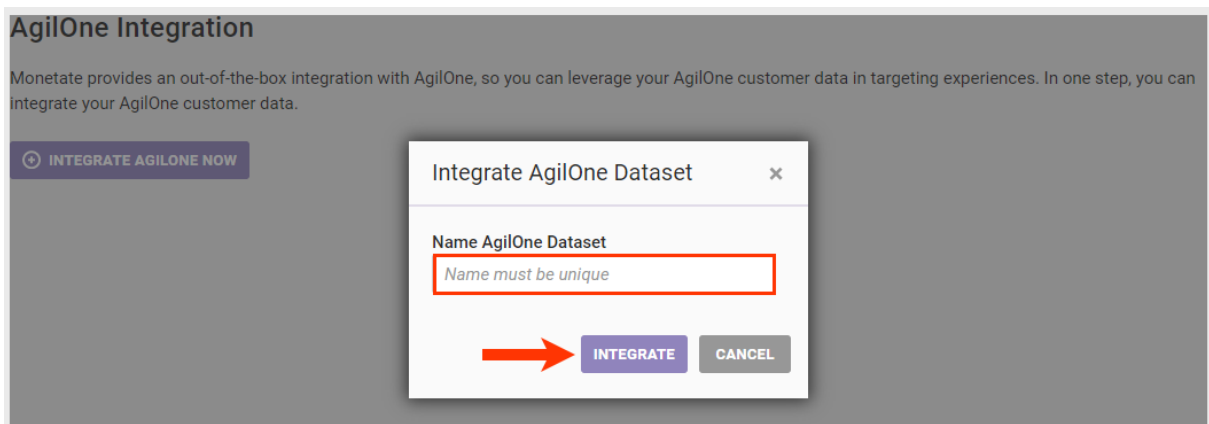
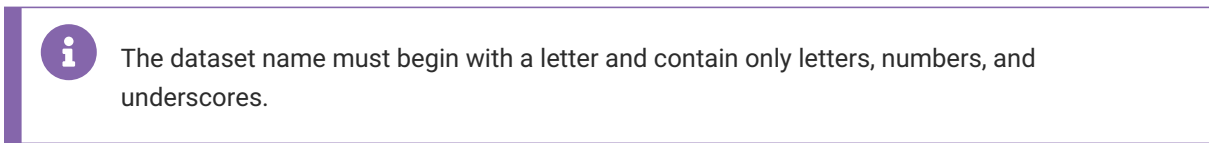
 If the **AgilOne** tab doesn't appear on the Integration page, then this feature isn't activated for your account. Contact your dedicated Customer Success Manager for assistance.

The screenshot shows the Monetate Integration page. The top navigation bar includes 'Third-Party Analytics', 'Tag', 'Inspector', 'API', 'SSO', 'AgilOne' (highlighted with a red box), and 'First-Party Proxy'. The main content area displays 'Third-Party Analytics' and an 'ADD REPORT' button.

3. Click **INTEGRATE AGILONE NOW**.



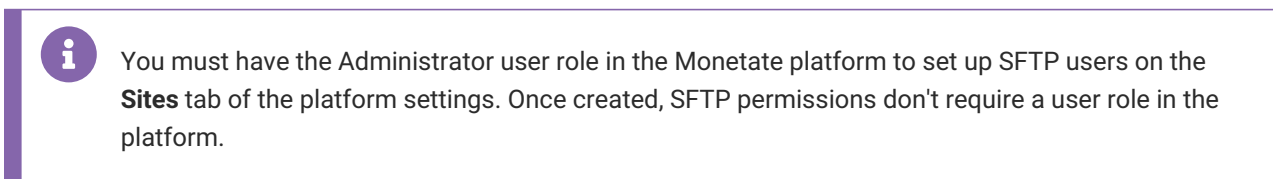
4. Name the AgilOne dataset and then click **INTEGRATE**.



Now that you have integrated AgilOne, you're ready to upload the dataset schema via SFTP, by using the [Create Dataset Schema wizard](#) in the Monetate platform, or via the [Data API](#).

## Setting Up the SFTP Upload

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



1. Click **CONFIGURE YOUR SFTP CREDENTIALS** on the **AgilOne** tab.

### AgilOne Integration

Monetate provides an out-of-the-box integration with AgilOne, so you can leverage your AgilOne customer data in targeting experiences. In one step, you can integrate your AgilOne customer data.

#### SFTP Directories

Partial updates:	/datasets/partial
Full updates:	/datasets/full
File Name Prefix:	60487-
File Name Examples:	60487-example.csv

#### SFTP Connection Settings

Server URL	sftp://sftp.monetate.net
<b>CONFIGURE YOUR SFTP CREDENTIALS</b>	

2. Click **CREATE SFTP USER** on the **Sites** tab of the Monetate platform settings.

The screenshot shows the Monetate platform settings page for the site 'monetate.mybigcommerce.com'. The 'Sites' tab is selected. The page displays configuration for 'Production' and 'AMERICA/DOMINICA' timezone. It includes sections for 'SFTP Connection Settings for Accessing the Session Stream' and 'SFTP Connection Settings for Uploads'. A red arrow points to a green 'CREATE SFTP USER' button. Below this is a table of existing SFTP users.

USER NAME	DESCRIPTION	AUTH TYPE	LAST LOGIN
ftp65802828		Password	Not available

3. Configure the user credentials.  
a. Input a description for the SFTP user.

SFTP User Details ✕

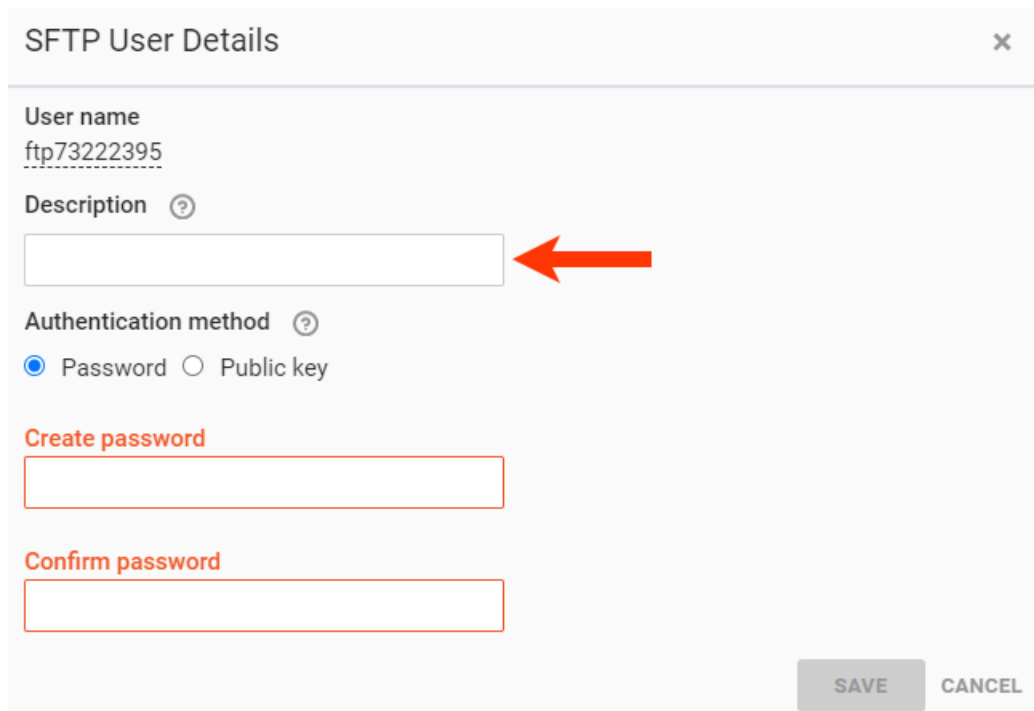
User name  
ftp73222395

Description ?

Authentication method ?  
 Password  Public key

Create password

Confirm password

A screenshot of the 'SFTP User Details' form. The 'User name' field is filled with 'ftp73222395'. The 'Description' field is empty, and a red arrow points to it from the right. The 'Authentication method' section has 'Password' selected with a radio button. Below are two empty text boxes for 'Create password' and 'Confirm password'. At the bottom right are 'SAVE' and 'CANCEL' buttons.

- b. Select the authentication method.

SFTP User Details ✕

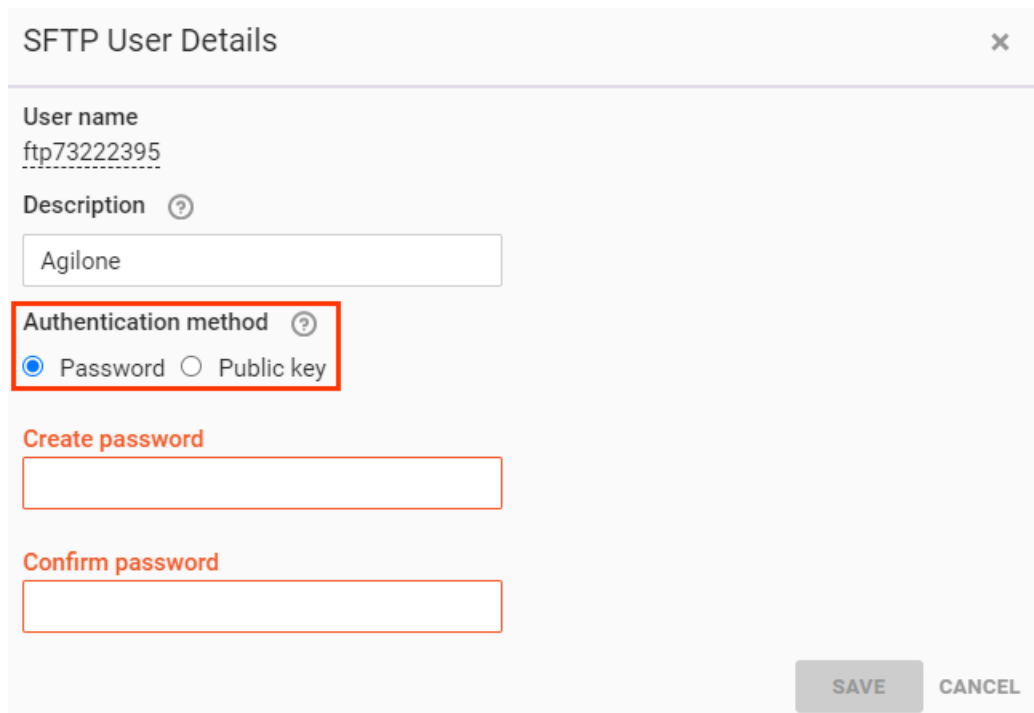
User name  
ftp73222395

Description ?  
Agilone

Authentication method ?  
 Password  Public key

Create password

Confirm password

A screenshot of the 'SFTP User Details' form. The 'User name' field is filled with 'ftp73222395'. The 'Description' field is filled with 'Agilone'. The 'Authentication method' section is highlighted with a red box, showing 'Password' selected with a radio button. Below are two empty text boxes for 'Create password' and 'Confirm password'. At the bottom right are 'SAVE' and 'CANCEL' buttons.

- 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**.

SFTP User Details
✕

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**User name**  
ftp73222395

**Description** ?

**Authentication method** ?  
 Password  Public key

**Create password**

**Confirm password**

➔

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 you create the schema and upload the dataset, you can view the newly created Customer Attributes dataset by following these steps.

1. Click **DATASETS** in the top navigation bar, and then click **Customer Attributes** from the left-hand category listing.
2. Scroll as necessary to find on the Customer Attributes list page the dataset you created, and then click the dataset's name to view its details page.

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

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AgilOne

↑
UPLOAD DATA
▼

Attributes
Update History

✓ LAST UPDATED A DAY AGO

Rows: -

Identifier Name	Add

Name	Unique ID	Data Type	Experience Usage	
> last_12_months_group		STRING	0 active	0 inactive
> product_cluster		STRING	0 active	0 inactive
> closest_store		STRING	0 active	0 inactive
> primary_store		STRING	0 active	0 inactive
> execution_id		STRING	0 active	0 inactive
> likelihood_to_convert		STRING	0 active	0 inactive
> customer_gender		STRING	0 active	0 inactive
> primary_organization		STRING	0 active	0 inactive
> do_not_email		STRING	0 active	0 inactive
> recency_days_group		STRING	0 active	0 inactive
> customer_birth_month		STRING	0 active	0 inactive
> customer_age		STRING	0 active	0 inactive
> customer_id	✓	STRING	0 active	0 inactive
> email		STRING	0 active	0 inactive
> likelihood_to_buy		STRING	0 active	0 inactive
> likelihood_to_engage		STRING	0 active	0 inactive
> frequency_group		STRING	0 active	0 inactive
> average_discount_rate		STRING	0 active	0 inactive
> primary_brand		STRING	0 active	0 inactive
> total_revenue_group		STRING	0 active	0 inactive
> behavior_cluster		STRING	0 active	0 inactive

> email\_status

STRING

0 active

0 inactive

The **Upload History** tab shows the filename that was the dataset's initial upload as well as any additional uploads.

[< BACK TO DATASETS](#)

# AgilOne

[UPLOAD DATA](#)

Attributes **Update History** ✓ LAST UPDATED A DAY AGO Rows: 100

ⓘ 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
✓ APR 24 2023, 12:11 PM	<a href="#">agilone-snw.csv</a>	WIZARD	swalken@monetate.com	Partial	100
✓ APR 24 2023, 12:07 PM	<a href="#">agilone-snw.csv</a>	WIZARD	swalken@monetate.com	Initial Upload	1

If the platform encountered an error during the upload, then a warning message appears in the entry for the dataset on the Customer Attributes list page. Click that message to view the File Upload Error modal that contains the specific error(s) encountered.

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