

Integrate with AgilOne

Within the Monetate platform you can use a 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.

When you integrate your Monetate account with your AgilOne account, 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 |
| product_cluster | String |
| likelihood_to_convert | String |
| behavior_cluster | String |

| Header | Field Type |
|--------------|------------|
| execution_id | Number |

Setting Up the Integration

Follow these steps to establish the AgilOne integration.

1. Click the settings cog in the top navigation bar 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. 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 analytics for 'Auto Personalization experiences' (2 experiences, 19 context variables), 'Dynamic Test experiences' (1 experience, 100% success), and 'Standard' (8 experiences, 40 metrics).

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 'Integration' page with tabs for 'Third-Party Analytics', 'Tag', 'Inspector', 'API', 'SSO', 'AgilOne' (highlighted with a red box), and 'First-Party Proxy'. Below the tabs, there is a section for 'Third-Party Analytics' with an 'ADD REPORT' button.

3. Click **INTEGRATE AGILONE NOW**.

The screenshot shows the 'AgilOne Integration' page. The 'AgilOne' tab is selected. Below the title, there is a paragraph: '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.' Below this is a button labeled 'INTEGRATE AGILONE NOW' with a red arrow pointing to it.

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



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

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.

INTEGRATE AGILONE NOW

Integrate AgilOne Dataset

Name AgilOne Dataset

INTEGRATE CANCEL

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.

Third-Party Analytics Tag Inspector API SSO **AgilOne** First-Party Proxy

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 |
|------------|--------------------------|

CONFIGURE YOUR SFTP CREDENTIALS

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

The screenshot shows the Monetate platform settings for the site 'monetate.mybigcommerce.com'. The page is titled 'monetate.mybigcommerce.com' and includes a 'SAVE' button. The settings are for the 'Production' environment and the 'AMERICA/DOMINICA' timezone. Under 'SFTP Connection Settings for Accessing the Session Stream', the 'Server URL' is 'sftp://download.monetate.net'. Under 'SFTP Connection Settings for Uploads', the 'Server URL' is 'sftp://sftp.monetate.net', the 'Merchandiser' is '/upload', and the 'Datasets' are '/datasets'. At the bottom, there is a section for 'SFTP Users for Accessing the Session Stream and Uploads' with a table containing one user: 'ftp65802828' with 'Password' authentication and 'Not available' last login. A red arrow points to a green 'CREATE SFTP USER' button.

| USER NAME | DESCRIPTION | AUTH TYPE | LAST LOGIN |
|-------------|-------------|-----------|---------------|
| ftp65802828 | | Password | Not available |

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

The 'SFTP User Details' dialog box shows the following fields and options:

- User name: ftp73222395
- Description: (highlighted with a red arrow)
- Authentication method: Password Public key
- Create password:
- Confirm password:

Buttons: SAVE, CANCEL

- b. Select the authentication method.

SFTP User Details ✕

User name
ftp73222395

Description ?
Agilone

Authentication method ?
 Password Public key

Create password

Confirm password

SAVE CANCEL

- 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 ✕


User name
ftp73222395

Description ?
Agilone

Authentication method ?
 Password Public key

Create password
.....

Confirm password
.....

 SAVE CANCEL

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.

Once the upload is complete, you can view the newly created customer dataset by navigating to the [Customer Attributes view of the Datasets list page](#) or the [Customer Datasets list page](#), as appropriate for your version of the Monetate platform, and then clicking the AgilOne dataset to view its details page.

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

Depending on your version of the Monetate platform, you can see all the headers present in the CSV file you uploaded on the **Attributes** tab or the **Overview** tab of the dataset details page shows. See [Customer Attributes Dataset Details Page](#) or [Customer Dataset Details Page](#), as appropriate, to better understand the information you can find on and what actions you can take from the dataset's details page.