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.

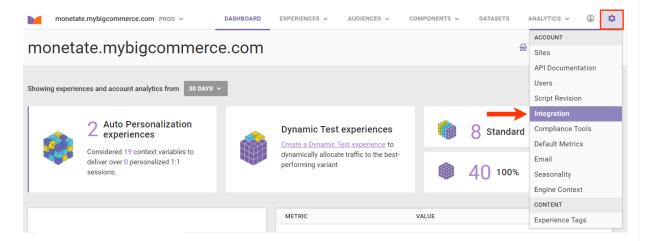
Header	Field Type
customer_id	String
email	String
primary_organization	String
primary_store	String
primary_brand	String
closest_store	String
email_status	String
do_not_email	String
total_revenue_group	String
last_12_months_group	String
frequency_group	String
recency_days_group	String
average_discount_rate	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

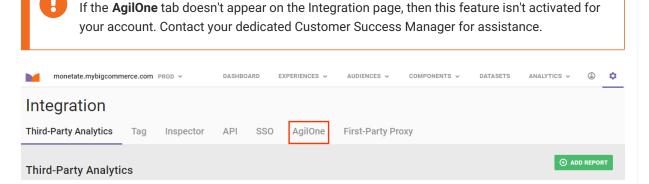
Setting Up the Integration

Follow these steps to establish the AgilOne integration.

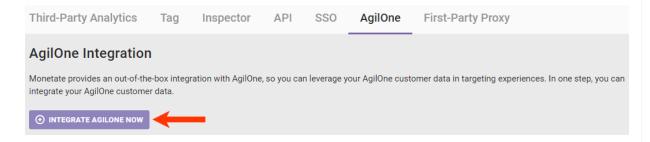
1. Click the settings cog in the top navigation bar and then select **Integration**.



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



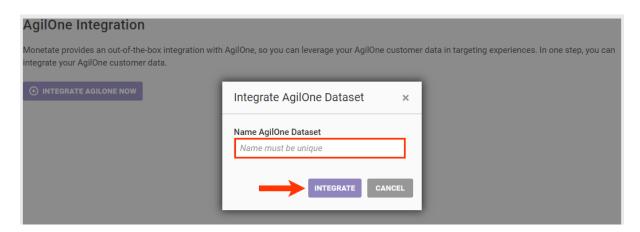
3. Click INTEGRATE AGILONE NOW.



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.

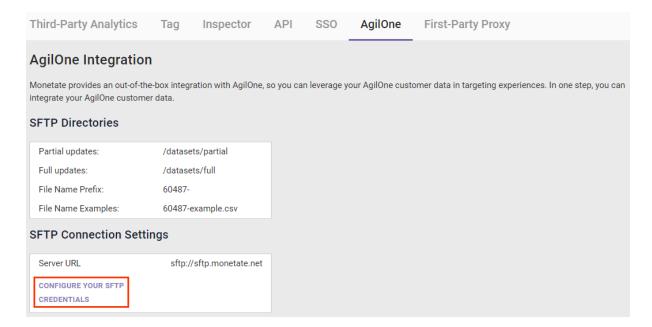
Setting Up the SFTP Upload

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

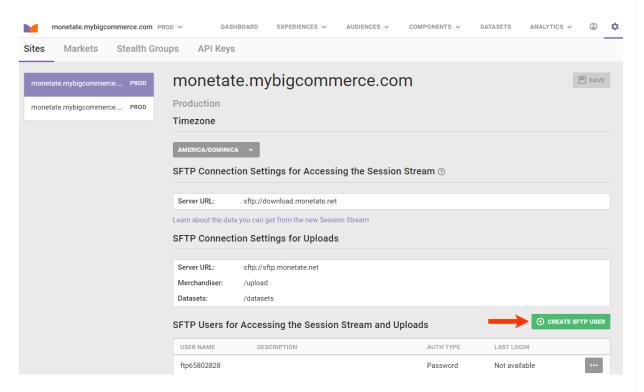


You must have the Administrator user role in the Monetate platform to set up SFTP users on the **Sites** tab of the platform settings. Once created, SFTP permissions don't require a user role in the platform.

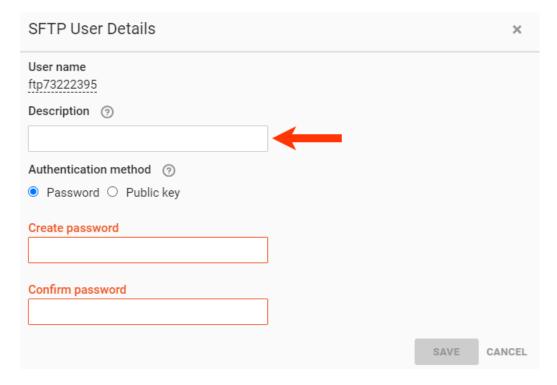
1. Click CONFIGURE YOUR SFTP CREDENTIALS on the AgilOne tab.



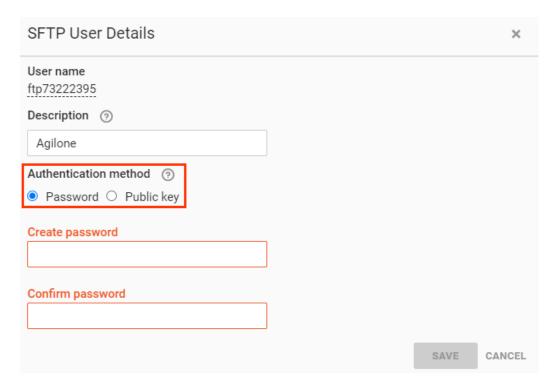
2. Click CREATE SFTP USER on the Sites tab of the Monetate platform settings.



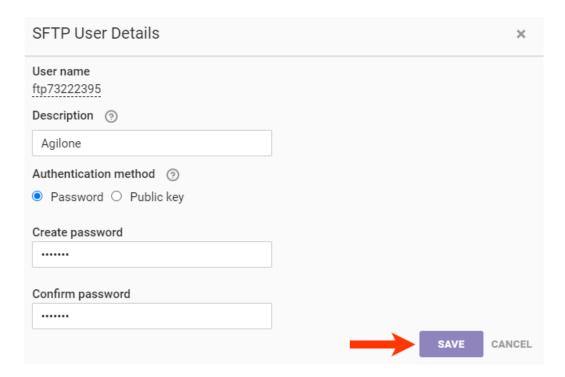
- 3. Configure the user credentials.
 - a. Input a description for the SFTP user.



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.

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.