

Import File to Data Extension ^[1]

October 25, 2023 by [Melanie Jones](#) ^[2]

NOTE This task requires assistance from your [eComm Specialist](#) ^[3].

Learn how to create a Data Extension as you typically would, then Import over the data from a file. Just remember, you'll need the Contact 18 ID to Import successfully.

Call for Help Importing a file over a Data Extension is simple in theory but more difficult when put into practice the first time. There are some small intricacies that will vary, depending on your use case. Feel free to arrange 30 min. with Melanie Jones to walk through it together.

1 | Create Data Extension

The goal is to create a Data Extension as usual. Access the Marketing Cloud Business Unit that the message will be sent from and configure the Data Extension. There is no need to 'Start' the Data Extension once created.

- 1A | Prepare Report
- 1B | Create Data Extension

Required Fields:

- Contact ID
- Primary Email (or any Email field)
- Other personalization fields (like First Name)
- Contact 18 ID

Create a Data Extension

Your Data Extension should be configured like the following:

- **Contact ID=Key**
- **Primary Email Field=Email Address**
- Include any fields used for personalization or dynamic content
- DO NOT INCLUDE the **Contact 18 ID** in the Data Extension

- Set to **Overwrite**
- Click **Save** at the top
- There is no need to Start the Data Extension since you will import a file to the Data Extension in step 3.

Add Column to Data Extension

With the basic Data Extension created, you need to add another column to house the data that you wish to upload. To manually add a new column to a Data Extension:

- Navigate to **Subscribers >> Salesforce Data Extension**
 - Open the Data Extension you created
 - Add a field by working in the Fields box in the bottom right
 - Click the **Edit Fields** button
 - Click the **Plus icon**
-
- Name the new field as you wish (ie External Data below)
 - If the value is text, keep the **data type as text** (most common)
 - Ensure the **length** number is larger than the number of characters in the field being uploaded
 - Check **Nullable** if this value can be blank
 - Provide a **Default Value** if you wish
 - Click **Save Fields** in the top-right

Fields					
Name	Data Type	Length	Primary Key	Nullable	Default Value
Contact ID	Text	255	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
First Name	Text	255	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Last Name	Text	255	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
SYS Email	EmailAddress	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
External Data	Text	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

2 | Create File

There are many ways to go about getting prepared to upload a file to a Data Extension.

- Prepare a spreadsheet with columns including:
 - 18-digit contact ID
 - Email
 - these values can vary in the domain
 - other personalization fields
 - External data to add
- Save as a CSV or TXT

XLOOKUP Function

- Oftentimes, your file will need to be created by merging a Salesforce Report (with the 18-digit contact ID, email address, first name & last name) with an external file including custom information. The XLOOKUP function plays an important role in merging two sheets into a single sheet to be imported.
 - Excel
 - [XLOOKUP Function Video | 44 seconds](#) [4]
 - [XLOOKUP Details](#) [5]
 - Google Sheets
 - [FILTER Function](#) [6]

See three use cases below for importing a file:

- Adding External Information
- Incorrect Email in Salesforce
- Merge Many Data Extensions

Some users wish to have external information included in their Data Extension. This could be a custom salutation for personalization (like Mr. & Mrs. Jones) or a piece of information to drive dynamic content in an email.

1. Create a Report with the required columns and export:
 - 18 Digit Contact ID
 - University Email
 - field used to merge files (step 2 below)
 - other personalization fields
2. Use XLOOKUP function to merge external file with exported Salesforce Report
3. Save as file with columns labeled

Adding External Information for AMPscript

- While uploading external details to a Data Extension to create custom emails with AMPscript is a valid use-case, it is not supported by eComm. Users with AMPscript experience are welcome to explore this functionality, noting eComm will not be able to provide resources or support.

Some of the campuses recently noticed many employees/students have an incorrect/missing email in their university email field. This issue stems from the source system (Campus Solutions or HRMS) and takes time to remedy. As an immediate work-around, you can Import over the Subscribers in Marketing Cloud that have incorrect/missing emails.

- Create a Report with the respective University Email Field
 - **Required Columns** include: 18 Digit Contact ID, University Email, other personalization fields
- **Export** Report
- Manually input new email addresses in replace of the incorrect ones
- **Save** as file with columns labeled

Merge multiple Data Extensions (with different University emails) into a single Data Extension.

Employee Services is a good example of using this Import feature. Typically, when they email across the campuses they send to four different Data Extensions to target four different university emails. We can essentially merge those into one Data Extension so they can leverage A/B Testing and Journey Builder (which don't support including multiple data extensions).

1. Download and open the file
2. Look for past 401(a) reports in SF
 - Save As a new report
 - Rename report with the date and add the description
3. Open old campaign
 - Clone campaign
 - Rename the campaign with the date
 - Share campaign with Employee Services Public Group
 - Update campaign name in SF report filter
4. Excel file
 - Add Campaign column > copy and paste campaign ID
 - Add Status column = Sent
 - Copy and paste all columns
5. Apsona
 - Campaign Members > Tools > Import
 - Copy and paste from Excel file
 - Add=no checking > Tab > Next
 - Map *Employee ID*
 - Map *Campaign ID*
 - Map *Status*

- Download any rejections. Sometimes Employee ID is wrong.
- 6. Go to SF report and campaign and make sure the total number matches
 - Export report for each campus using the filters
 - Save as a file file (CSV or TXT)
 - Make sure there aren't blank email addresses. If there are, look them up in SF and add the email address if they have a campus address.
 - Copy from campus email column and paste it into the email column (keep it all in one excel file)
 - Do this process for each campus (1, 5, 2 3 6, 4). Usually, there won't be anyone for System but be sure to check.
 - Copy and paste all columns to the first exported file and make sure to copy and paste the campus emails into the email column.
- 7. Go to Marketing Cloud to create the data extension
 - Open Employee Services BU
 - Email > Interactions > Import > Create

[image]

1. Put DO NOT RUN in DE description
2. Salesforce Objects & Reports > Search Report
3. Campaign Name, Contact ID, First Name, Last Name, Email
4. Contact ID is Key
5. Update Email type to Email Address
6. Save & Start
7. Go to DE in Salesforce Data Extensions > DE > Records Tab > Import > Select excel file

[image]

[image]

1. Double check import and make sure there aren't personal email addresses
2. Move DE to Shared Items > Employee Services folder

3 | Import File to Data Extension

- Navigate to **Content Builder**
- Hover **Subscriptions** then drill into **Salesforce Data Extensions**
- Select your Data Extension name to open details

Home Email Overview Content **Subscribers** Interactions A/B Testing

Subscribers

- My Subscribers
 - All Subscribers
 - My Lists
 - My Groups
 - Publication Lists
 - Suppression Lists
- Profile Management
- Preference Management

Salesforce Data Extensions

jones ✕ Delete Move

<input type="checkbox"/>	Name ▲	Type
<input type="checkbox"/>	08 UREL EID Mort Jones Torres	Standard
<input type="checkbox"/>	08 UREL OG Mel Jones	Standard

- Select tab two titled **Records**
- Click **Import** in the top left

Salesforce Data Extensions > 08 UREL OG Mel Jones

+ 08 UREL OG Mel Jones
✓ Available

08 UREL OG Mel Jones
Properties
Records
Tracking

Export
Import

First Name	Last Name	SYS Email	Contact ID
Melanie	Jones	melanie.jones@cu.edu	003f400000mJOpFAAW

- 3A | Upload File
- 3B | Configure Mapping
- 3C | Review & Import
- **File:** find your saved file
- **Delimiter:** Comma or Tab (depending on the file type)
- **Date Format:** Leave as Default - English
- **Import Type:** IT DEPENDS
 - Overwrite (most common) | Removes existing records and overwrites with file data
 - Add & Update | Add new records and update existing, will not remove existing
 - Add Only | Add new records, do not update or remove existing records
 - Update Only | Update existing records, do not add new or remove existing records
- **Import Options:** Leave as Default - do not check/uncheck anything

Import Into Data Extension

1 Upload File

2 Configure Mapping

3 Review & Import

Data Extension

08 UREL OG Mel Jones

File location

☒ My Computer
☐ FTP

File*

☐ Compressed

Delimiter*

☒ Comma
☐ Tab
☐ Other

Date format

Example: 8/23/2019 10:50 AM

Import type

Import options

☒ Skip rows in import file with bad data
☐ Respect double quotes as a text qualifier

Supported File Type

Your import must be a delimited, or otherwise
If file size exceeds 20MB
FTP option.

- Select **Next** in the bottom right

STEP 1 | Create Data Extension The Import Type you chose here (Step 3A | Import file Type) depends on your desired outcome. This will also impact if you Start your Data Extension in Step 1 or not.

Select **Map Manually**:

- Contact 18 ID=Contact ID
- Email=Email
- Other fields=other fields

Import Into Data Extension

☒ Upload File
 ☐ 2 Configure Mapping
 ☐ 3 Review & Import

☐ Map by Header Row
 ☐ Map by Ordinal
 ☒ Map Manually

"es test.csv"	Data Extension Columns
Required	
Contact 18 Id	Contact ID (Text)
Optional	
First Name	First Name (Text)
Last Name	Last Name (Text)
Email	SYS Email (Email)

es test.csv
Rows: 1
Columns: 4
Size: 94 Bytes

Cancel

- Select **Next** in the bottom right
- Review your Import details
- Select **Import** in the bottom right
- You'll receive an email notice once complete. Confirm it is successful.
 - *Failed Imports often read a Case Sensitive issue. Confirm you are importing a file with Contact 18 ID rather than just the Contact ID (15 digit).*

WARNING

Do NOT re-Start your Data Extension after completing the import. The data you just imported will be overwritten.

4 | Add Personalization to Email & Test

- To add personalization, click into the content block of the email

- Select the **Personalization icon** and click **Choose New Data Source** in the dropdown

The screenshot shows the 'Edit Email' interface with the 'Content' tab selected. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', and 'Interactions'. Below this, there are tabs for 'Properties', 'Content', and 'Preview and Test'. The main editor area has tabs for 'Content', 'Block Settings', and 'HTML Editor'. A toolbar with various formatting and editing icons is visible. A dropdown menu is open from the 'Personalization' icon (a person icon), showing a list of 'Profile Attributes' including 'Email Address', 'Contact ID', 'Employee Preferred Name', 'Student Preferred Name', 'Alumni_Donor Preferred N...', 'Last Name', and 'Solution'. At the bottom of this dropdown is a link labeled 'Choose New Data Source'. Red boxes highlight the 'Personalization' icon and the 'Choose New Data Source' link.

- Choose your data source by opening the **Salesforce Data Extensions** folder
- **Select your Data Extension** and click the blue **OK** button in the bottom right

Email Overview **Content** Subscribers ▾ Interactions ▾

[← Edit Email](#) [New User Credentials](#)

Data Extension or Audience

All Audience Types ▾

Data Extensions

> Shared Data Extensions

> **Salesforce Data Extensions**

> Shared Salesforce Data Extensions

NAME ↑

008 UREL Mel Jones TEST

08 ECOM UCB Budget Team TXN

08 SYS Pref Name Test

08TEST UREL Mel Jones

New User Credentials

OG Positive Election UCS TXN

OG Postive Election UCB TXN

OG UCCS Emp SUB UCCS Event

1 to 8 of 8 items

25 ▾

 per Page

[Cancel](#)

- Now when you select the **Personalization icon** the Data Extension selected should be

listed with available fields

- Select the attribute you wish to add

The screenshot shows the 'Edit Email' interface with the 'Content' tab selected. A dropdown menu is open, displaying a list of available attributes. The attribute '08TEST UREL Mel Jones' is highlighted at the top, and 'Consent MonthZ' is highlighted in blue below it. Other visible attributes include 'Contact ID', 'Last Name', 'Email', 'Student Preferred Name', and 'Email Address'. The dropdown also includes a section for 'Profile Attributes' and a 'Choose New Data Source' link at the bottom. The background shows the email editor with a toolbar and a preview area.

Don't forget to test your personalization [7].

Related Content

- What is a data extension? [8]
- How do I build a data extension? [8]
- How do I import/refresh a data extension? [8]

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Import File to Data Extension

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