

Create Marketing Cloud Data Extensions [1]

July 23, 2024 by [Melanie Jones](#) [2]

If you need to send communications to internal audiences (faculty, staff or students) you'll want it delivered to their campus email addresses (eg; @colorado.edu, @ucdenver.edu, @cu.edu or @uccs.edu), To do so, you'll need to send to a Data Extension. eComm specialist create Data Extensions (as part of the [audience creation process](#) [3]) but it's the [sender's responsibility to re'Start' them before each send](#) [4].

APPLY YOURSELF

Those tasked with [creating audiences](#) [3] can apply the entire process by cloning the [eComm specialist Training Plan](#) [5]. After reading the instructions below, navigate to the **Reports & Data Extensions tab** to practice creating Data Extensions (populate Columns D & E).

Create Salesforce Report

In Salesforce, create or modify the report that will be used to create the Data Extension. You MUST include:

- Contact ID and
- email field the message should be delivered to, like:
 - UCB Email
 - UCD Email
 - UCCS Email
 - SYS Email
 - Email
- Other personalization fields, like:
 - First name
 - Preferred Student Name
 - Preferred Employee Name
 - Last name
 - others

Examples of Reports prepared for Data Extensions:

CU Boulder Students | Communications for students are sent to their university email, in this case UCB Email.

	Contact ID ↑	Student Preferred Name	Last Name	UCE
103	00	Jack	A	ja
104	00	Sarah	K	sa
105	00	Sweta	A	sw

CU Denver Employees | Communications for employees are sent to their university email, in this case UCD Email.

	Contact ID	Employee Preferred Name	Last Name	UCD
2	00	Daniel	B	d
3	00	Zak	K	z
4	00	Katherine	K	k

Create Data Extension

Follow along with the detailed instructions below and use the [1-pager as a quick reference](#) ^[6] moving forward.

- From the Email app, hover **Interactions** in the navigation, then select **Import** in the dropdown
- Click the **Create** button

The screenshot shows a software interface with a top navigation bar containing 'Email', 'Overview', 'Content', 'Subscribers', and 'Interactions'. The 'Interactions' panel on the left displays a tree view under 'Activities' with items like 'Data Extract', 'Report', 'File Transfer', 'Import' (highlighted), 'Query', 'Scripts', 'Filter', and 'Data Factory Utility'. The 'Imports' panel on the right features a 'Create' button (highlighted with a green box), a 'Delete' button, and a table of data extensions. The table has a 'Name' column and lists several entries such as 'OG MC Users UCCS', 'OG MC Users UCD', 'OG MEC SYS and ADV', 'OG MEC UCB TXN', and 'OG MEC UCCS TXN'. A dropdown menu is open on the right side of the 'Imports' panel, showing options like 'Data Extract', 'File Transfer', 'Filter', 'Query', 'Script', 'Report', and 'Data Factory Utility'.

Properties

- **Name** your Data Extension
 - Use a name similar to the Report, that aligns with the naming convention of other Data Extensions (DE)
 - *!!IMPORTANT! Data Extension names can't exceed 35 characters. Accidentally doing so creates an unusable Data Extension that will be seen when sending, and should be deleted (instructions below).*
- Leave **External Key** blank
- Adding a **Description** is encouraged but not required


Source

- Choose **Salesforce Objects & Reports** in the File Location dropdown
- Select the **Report** radio button under Salesforce Data Type
- Click the **Select** button

Imports > New Import

 Save  Delete  Cancel Properties**Name** *(required)*

0714SeedList UCCS TXN

External Key**Description** Source**File location** *(required)*

Salesforce Objects & Reports ▼

Salesforce Data Source Type *(required)* Object Report Select

- Search for the Report name in the popup window by **pasting the Report name** and selecting the **Find Now** button
- Once found, **check the box next to the Report name** and select the **OK** button at the bottom of the pop-up.

Look for Reports that meet this criteria

Name :

Note: To ensure a successful send, a column in your report must contain 'Contact ID' or 'Lead ID' in a column name or your send will fail.

Results:

<input type="checkbox"/>	Name	Type	Owner
<input checked="" type="checkbox"/>	09 UCD ADV 0714SeedList UCCS TXN	Report	Melanie Jones

Page 1 of 1 (1 items)

Configure Data Extension

- **Included**
 - **Contact ID**
 - **Email Address** (might be UCCS Email, UCB Email, UCD Email, Sys Email, or Email)
 - Any other fields used for personalization
- **Type=Email Address**
 - Whatever email address you are using must have the **Type set to Email Address**
- **?Key**
 - **Contact ID** will ALWAYS be the key
- Select the **Save Config** button in the bottom left

Imports > New Import

Save Delete Cancel

Properties

Name (required)
0714SeedList UCCS TXN

External Key

Description

Source

File location (required)
Salesforce Objects & Reports

Salesforce Data Source Type
 Object Report

Import Action Settings

Update Type (required)
Add and Update

Data Quality Settings

- Skip rows with bad data
- Respect double quotes

Import Qualifications

- Skip import if last import was less than [] hours ago.

Customize DataExtension Generation

<input checked="" type="checkbox"/> Included	Name	Type	Length
<input checked="" type="checkbox"/>	Contact ID	Text	255
<input checked="" type="checkbox"/>	First Name	Text	255
<input checked="" type="checkbox"/>	Last Name	Text	255
<input checked="" type="checkbox"/>	UCCS Email	Email Address	100

Save Config Cancel

Import Action Settings & Import Completion Settings:

- Select **Update Type** of **Overwrite**
- Scroll to the bottom and **check the box for Send notification email to** and **enter the email address** for the user running the Data Extension [4]
 - *This email address will be notified when the import completes, indicating success or failure.*
- Select the **Save** button at the top of the screen

Imports > New Import



Save



Delete



Cancel

Import Action Settings

Update Type *(required)*

Overwrite ▼

Data Quality Settings

- Skip rows with bad data
- Respect double quotes (") as a text qualifier

Import Qualifications

- Skip import if last import was less than hours ago.
- Fail import if file is older than hours. Allow System Buffer of hours.

Validation

Date Format: English (United States) ▼

Example: 9/16/2022 2:25 PM

Import Completion Settings

Send notification email to

Run Data Extension

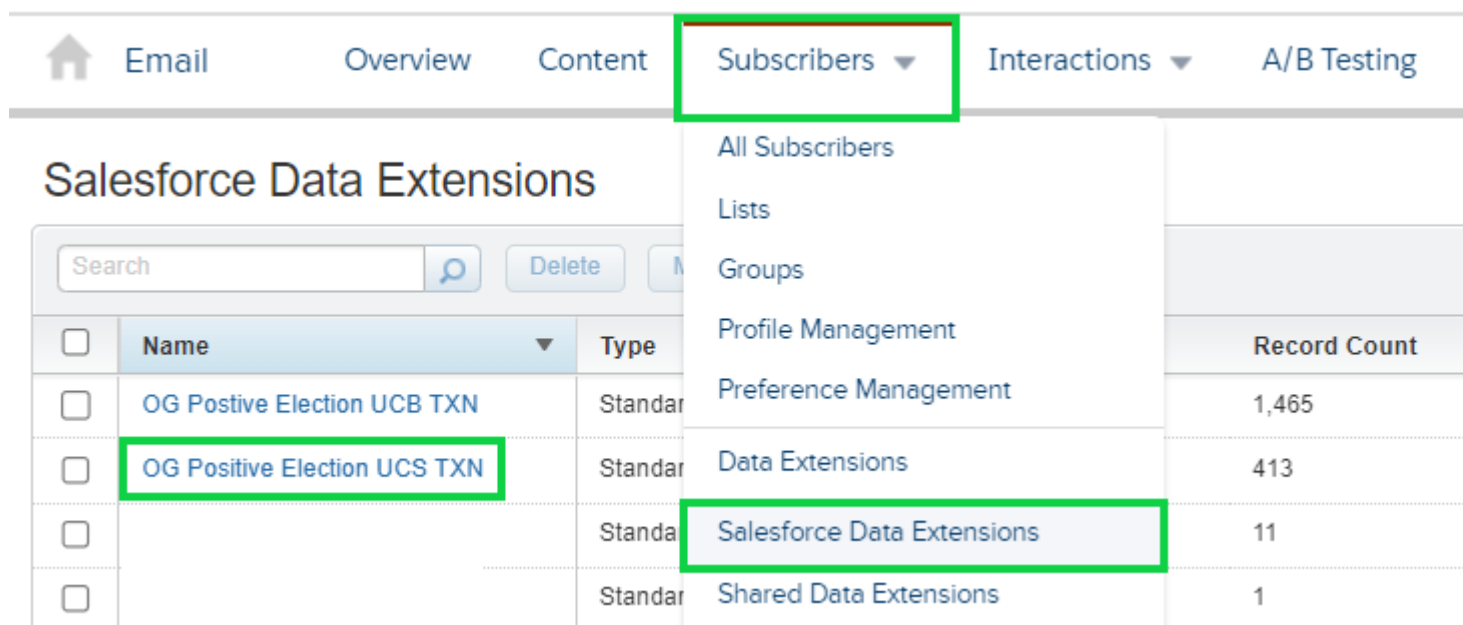
After the Data Extension is created, it's the sender's responsibility to re'Start' it before each send. Users can also update the notification settings (if needed) and view the Data Extension history and status [4].

View Data Extension Data & Configuration

NOTE Basic users cannot do the following.

Interested in seeing how a Data Extension is configured or the Data that is present after being started?

- Hover **Subscriber** and select **Salesforce Data Extensions** in the dropdown
- Click the **name of the Data Extension**



The screenshot shows the Salesforce interface with the 'Subscribers' dropdown menu open. The dropdown menu is highlighted with a green box and contains the following options: All Subscribers, Lists, Groups, Profile Management, Preference Management, Data Extensions, Salesforce Data Extensions (highlighted with a green box), and Shared Data Extensions. Below the dropdown is a table titled 'Salesforce Data Extensions' with columns for Name, Type, and Record Count. The table contains the following data:

Name	Type	Record Count
OG Positive Election UCB TXN	Standard	1,465
OG Positive Election UCS TXN	Standard	413
	Standard	11
	Standard	1

- The default tab **Properties** shows the Data Extension configuration and the count of individuals (413 in this example)

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

Salesforce Data Extensions > OG Positive Election UCS TXN

OG Positive Election UCS TXN Available

08_EMPL_20190416_Contract Election - Positiv **Properties** Records Tracking

EXTERNAL KEY ?

OG Positive Election UCS TXN_0

Created Date
Tuesday, July 19, 2022 11:16 AM
by Melanie Jones

Last Modified Date
Tuesday, July 19, 2022 11:16 AM
by Melanie Jones

Owner
Melanie Jones [Edit](#)

LOCATION
Salesforce Data Extensions [Change](#)

Type:
Standard

USED FOR SENDING
Yes

USED FOR TESTING
Yes [Edit](#)

SUBSCRIBER RELATIONSHIP
Contact ID relates to Subscribers on Subscriber Key

413
Records

Fields

Name

Contact ID

First Name

Last Name

UCCS Email

- The second tab labeled **Records** will show the data that populated in the Data Extension (or the audience) after being started

[Home](#)
[Email](#)
[Overview](#)
[Content](#)
[Subscribers](#)
[Interactions](#)
[A/B Testing](#)

[Salesforce Data Extensions](#) > OG Positive Election UCS TXN

OG Positive Election UCS TXN ✔ Available

08_EMPL_20190416_Contract Election - Positiv
 [Properties](#)
[Records](#)
[Tracking](#)

[Export](#)
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Contact ID	First Name	Last Name	UCCS Email	
00	Sylvia	M	si	@uccs.edu
00	Claire	F	ci	cs.edu
00	Andrea	F	al	@uccs.edu
00	Steven	T	st	@uccs.edu

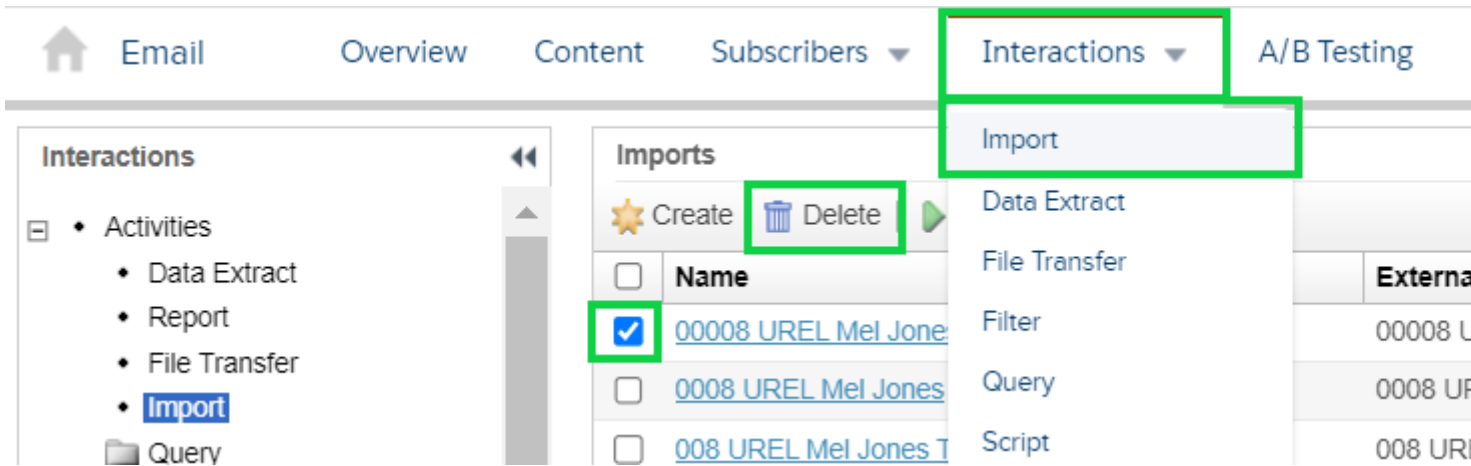
Delete Data Extension

Data Extension must be deleted in two different places. Failure to do so will result in confusion, including the Data Extension still being visible when sending (although unusable, resulting in a failed send).

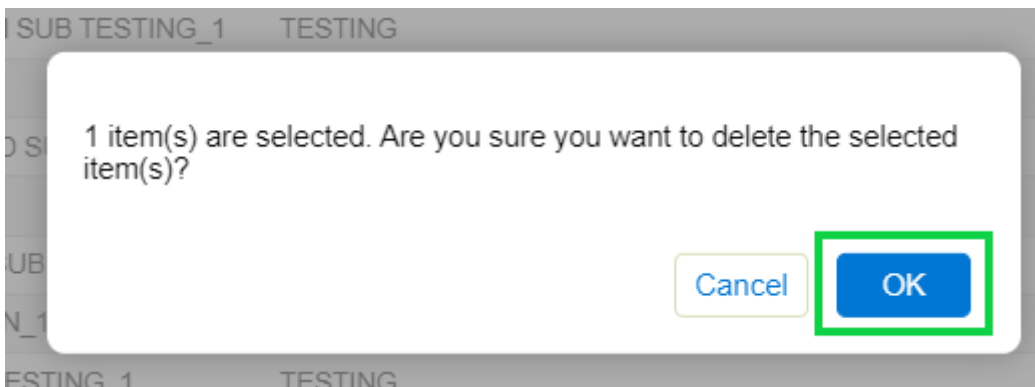
Data Extensions accidentally created with 35+ characters While you will get an error if you accidentally (corrected spelling) create a Data Extension with more than 35 characters, the reality is that Data Extension will be visible when sending (although unusable). Only the second method of deletion (outlined below) is needed to delete this Data Extension.

First

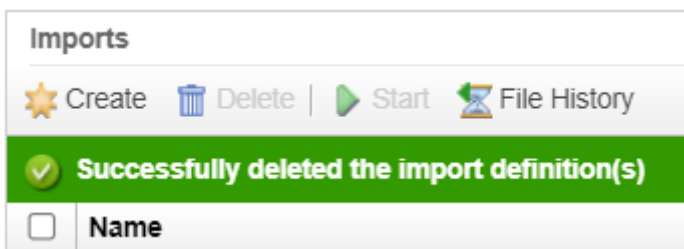
- Hover **Interactions**, then select **Import** in the dropdown
- **Check the box** next to the Data Extension and click the **Delete** button



- Select the blue **OK button** in the pop-up to confirm



- A green **Successfully deleted the import definition(s)** message will appear



Second

- Hover **Subscribers**, select **Salesforce Data Extensions** in the dropdown
- **Check the box** next to the Data Extension and select **Delete**

The screenshot shows the Salesforce interface. At the top, there are navigation tabs: Home, Email, Overview, Content, Subscribers (highlighted with a green box), Interactions, and A/B. Below the tabs, the 'Salesforce Data Extensions' section is visible. It includes a search bar and a 'Delete' button (highlighted with a green box). A table lists data extensions, with the first row '00008 UREL Mel Jones' selected (checkbox highlighted with a green box). A dropdown menu is open under 'Subscribers', showing options like 'All Subscribers', 'Lists', 'Groups', 'Profile Management', 'Preference Management', 'Data Extensions', and 'Salesforce Data Extensions' (highlighted with a green box). A 'Rec' column is partially visible on the right.

Test your knowledge with the quiz below.

TEST YOURSELF eComm specialists and other audience creators - regardless of their previous experience - are highly encouraged to complete an extensive quiz to ensure a deep understanding of Data Extensions annually. Please set aside 30-60 min. to complete the quiz of 35+ questions [7], many being open-ended. Do not miss the opportunity to review correct responses after submitting your answers to see how they match up for self-correction.

Related Content

- [How do data extensions relate to reports and campaigns?](#) [9]
- [How can I email donors?](#) [9]
- [How do I select my audience?](#) [10]
- [Why are my audience report names so complicated?](#) [11]
- [How do I add a new audience for my communications?](#) [12]
- [Data Extension Creation 1-Pager](#) [6]*
- [Can I import CSV data into a data extension?](#) [13]*

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Create Marketing Cloud Data Extensions

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