Home > Create Marketing Cloud Data Extensions

## Create Marketing Cloud Data Extensions

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 <u>audience creation process</u> [3]) but it's the <u>sender's</u> responsibility to re'Start' them before each send [4].

# APPLY YOURSELF

Those tasked with <u>creating audiences</u> [3] can apply the entire process by cloning the <u>eComm</u> <u>specialist Training Plan</u> [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 1	Student Preferred Name	Last Name	UCE
103	OC	Jack	А	ja
104	OC	Sarah	К	sa
105	OC	Sweta	А	SM

**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	В	d
3	00	Zak	К	Zi
4	00	Katherine	К	k

## **Create Data Extension**

Follow along with the detailed instructions below and use the <u>1-pager as a quick reference</u> [6] moving forward.

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



### 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. Accidently 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

ntent	Subscribers 🔻	Interactions 💌	A/B Testing	Tracking 🔻 🛛
Impo	rts > New Import			
🔛 Sa	ave   前 Delete 🥝 C	ancel		
B P	roperties			
	me (required) 14SeedList UCCS TXN	١		
Ext	ternal Key			
Des	scription			
∃ S	ource			
	e location (required) lesforce Objects & Re	ports 🗸		
	esforce Data Source Object   Report	<b>Type</b> (required)		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 button of the pop-up.

	ok for Reports that meet this criteria—				
No	ame : contains ~ ote: To ensure a successful send, a column i nd will fail.		4SeedList UCCS TXN ontain 'Contact ID' or 'Lead	ID' in a column na	ime or your
Resul	its:				Find N
	Name	Туре	Owner		
	09 UCD ADV 0714SeedList UCCS TXN	Report	Melanie Jones		
4					
<u> </u>		_			• •
Page	e 1 of 1 (1 items)				
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#### **Configure Data Extension**

- Included
  - Contact ID
  - Email Address (might be UCCS Email, UCB Email, UCD Email, Sys Email, or Email)
  - $\circ\,$  Any other fields used for personalization
- Type=Email Address
  - $\circ\,$  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

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Impo	orts > New Import			Ē				
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BP	roperties		Include	d	Name	Туре		Length
	me (required) 14SeedList UCCS TXN		Include	u	Contact ID	Text	~	255
					First Name	Text	~	255
	ternal Key				Last Name	Text	~	255
De	scription				UCCS Email	Email Addres	is 🗸	100
Sal	e location (required) alesforce Objects & Rep lesforce Data Source Object  Report Mport Action Setting	Тур						
	date Type (required) dd and Update ✓ Data Quality Settings— ☑ Skip rows with bad o							
	Respect double quo	tes						
	Import Qualifications —	Save	Config	Canc	el			
	Skip import if last im	port was le	ss than		hours ago.			

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

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Impo	orts > New Import						
📘 Sa	ave 🛅 Delete 🥝 C	Cancel					
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Ō	odate Type (required) verwrite ∽						
	Data Quality Settings – ✓ Skip rows with bad	data					
	_ '	otes ( " ) as a text qualifi	ier				
	<ul> <li>Import Qualifications</li> <li>Skip import if last import was less than hours ago.</li> <li>Fail import if file is older than hours. Allow System Buffer of hours.</li> </ul>						
	Validation —						
	Date Format: English	(United States) 9/16/2022 2:25 PM		~			
	nport Completion S	ettings il to melanie.jones@cu	edu				
Ľ	Senu nounication ema		.000				

**Run Data Extension** 

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

## View Data Extension Data & Configuration

NOTEBasic 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

<b>A</b>	Email	Overview	Content	Subscribers 🔻	Interactions	<ul> <li>A/B Testing</li> </ul>	
Sale	Salesforce Data Extensions			All Subscribers Lists			
Sea	Search Delete N			Groups			
	Name		• Туре	Profile Management	I	Record Count	
	OG Postive Ele	ection UCB TXN	Standa	Preference Manage	Preference Management		
	OG Positive El	ection UCS TXN	Standa	Data Extensions		413	
			Standa	Salesforce Data Exte	ensions	11	
			Standa	Shared Data Extens	ions	1	

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

Salesforce Data Exte	nsions > OG Positive	Election UCS 1	TXN		
OG Positiv	e Election UC	S TXN	🔹 Availal	ble	
08_EMPL_20	190416_Contract	Election - P	ositiv Propert	ties Records	Tracking
EXTERNAL	KEY ?				
OG Posi	tive Election U	CS TXN_0			41
Created Dat Tuesday, J by Melanie Jo Last Modifie	uly 19, 2022 11: mes		WEDGE		Record
Tuesday, J by Melanie Jo	uly 19, 2022 11:1		Owner Melanie Jones Edit		Fields
LOCATION Salesfor	ce Data Extensions	Change			Name
Type: Standard		onungo			Contact ID
					First Name
USED FOR		SED FOR TES	STING	Edit	Last Name
	ER RELATIONSHI		ubscriber Key		UCCS Ema

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

🔶 Email	Overview	Content	Subscribers 👻	Interactions 👻	A/B Testing	2			
Salesforce Data Extensi	ons > OG Positive	Election UCS	TXN						
OG Positive Election UCS TXN <ul> <li>Available</li> </ul>									
08_EMPL_2019	08_EMPL_20190416_Contract Election - Positiv Properties Records Tracking								
Export	port								
Contact ID	First	Name	Last Name	UCCS E	mail				
DO	Sylvia	1	Ν	SI	@uccs.edu				
DO	Claire	•	F	CI	cs.edu				
OC	Andre	a	Н	al	@uccs.edu				
OC	Steve	n	Т	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 visable when sending (although unusable, resulting in a failed send).

**Data Extensions accidently 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 visable when sending (although unusable). Only the second method of deletion (outlined below) is needed to delete this Data Extension.

### First

- Hover Interations, then select Import in the dowdown
- Check the box next to the Data Extension and click the Delete button



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

SUB TESTING_1 TESTING	
) S 1 item(s) are selected. Are item(s)?	you sure you want to delete the selected
UB N_1	Cancel
ESTING 1 TESTING	

• 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

A	Email Overview	Content	Subscribers 💌	Interactions 👻	A/B
Sale	osforco Data Extonsi	one	All Subscribers		
Salesforce Data Extensions			Lists		
Sea	rch 🔎	Delete	Groups		
	Name	Туре	Profile Management		Rec
	00008 UREL Mel Jones	Standar	Preference Manager	ment	1
		Standar	Data Extensions		0
		Standa	Salesforce Data Exte	ensions	1
Test y	our knowledge with the o	quiz below	Charod Data Evtonci	one	A

**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 <u>complete the quiz</u> 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**

- H [8] ow 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]
- <u>Data Extension Creation 1-Pager</u> [6]\*
- Can I import CSV data into a data extension? [13]\*

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 [5] https://data-extensions

[5] https://docs.google.com/spreadsheets/d/1wgFcL-

3XMHU\_o7x3WtCRBcu6NDe1ood5zbXK66L\_4J0/edit?usp=sharing[6]

https://www.cu.edu/doc/072024data-extension-1-pagerpdf?download=true

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