

## Import CSV File to Data Extension <sup>[1]</sup>

August 21, 2019 by [Melanie Jones](#) <sup>[2]</sup>

**NOTE** This task requires assistance from your [eComm Specialist](#) <sup>[3]</sup>.

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

**Call for Help** Importing a CSV 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 ID=Key
- Primary Email Field=Email Address
- Include any fields used for personalization or dynamic content
- Overwrite
- Send Notification to yourself or the user

Click **Save** in top

### 2 | Create CSV

There are many ways to go about getting a CSV prepared with the 18 digit ID and desired email field.

Prepare a spreadsheet with columns including:

- 18 digit contact ID
- Email
  - these values can vary in domain
- other personalization fields

Save as a CSV

**See two use cases below:**

- Incorrect Email in Salesforce
- Merge Many Data Extensions

*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 Report with 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 CSV 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).*

Create four campus specific Reports with respective University Email Field

Required Columns include: 18 digit contact ID, Email, other personalization fields

TIP! Make sure all your Reports have the same columns

Export and merge these into a single sheet

The Email column will be filled with emails from varying domains

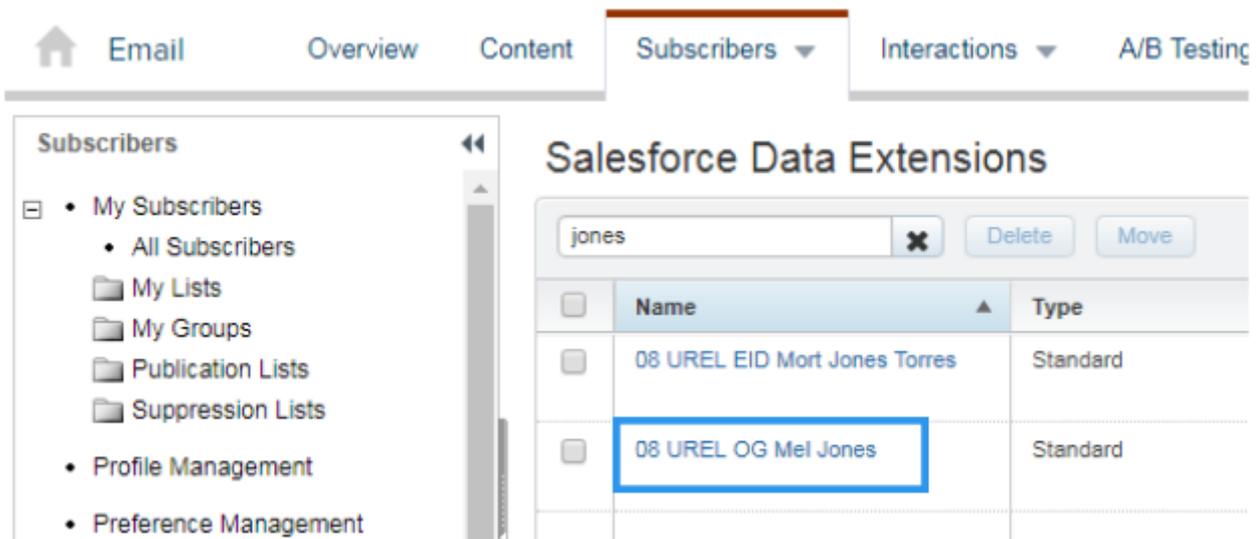
Save as a CSV with columns labeled

### 3 | Import CSV to Data Extension

Login to Marketing Cloud and navigate to Content Builder

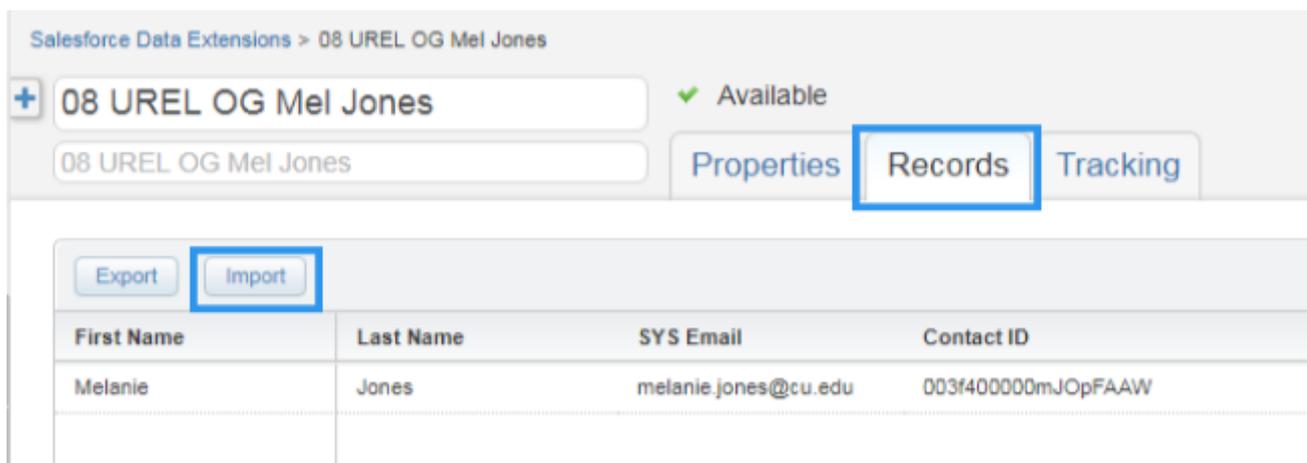
Hover **Subscriptions** then drill into **Salesforce Data Extensions**

Select your Data Extension name to open details



Select tab two titled: **Records** to confirm Subscribers have been added to the Data Extension successfully

Click **Import** in the top left



- 3A | Upload File
- 3B | Configure Mapping
- 3C | Review & Import

- **File:** find your saved CSV
- **Delimiter:** Comma
- **Date Fromat:** Leave as Default - English
- **Import Type:** IT DEPENDS
  - Overwrite | Removes existing records and overwrites with CSV 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

The screenshot displays the 'Import Into Data Extension' wizard, specifically the 'Upload File' step. The wizard is divided into three steps: 1. Upload File, 2. Configure Mapping, and 3. Review & Import. The current step is 'Upload File', which is highlighted with a blue arrow. The 'Data Extension' is set to '08 UREL OG Mei Jones'. Under 'File location', 'My Computer' is selected. The 'File' field contains 'es test.csv' and has a 'Browse...' button. The 'Compressed' checkbox is unchecked. Under 'Delimiter\*', 'Comma' is selected. Under 'Date format', 'English (United States)' is selected, with an example of '8/23/2019 10:50 AM'. Under 'Import type', 'Add and Update' is selected. Under 'Import options', 'Skip rows in import file with bad data' is checked, and 'Respect double quotes as a text qualifier' is unchecked. A 'Cancel' button is located at the bottom left. On the right side, there is a 'Supported File Type' section with a warning: 'Your import must be a delimited, or otherwise... If file size exceeds 20M... 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

1 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 CSV 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.

## Related Content

- [What is a data extension?](#) [4]
- [How do I build a data extension?](#) [4]
- [How do I import/refresh a data extension?](#) [4]

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Import CSV File to Data Extension

### Send email when Published:

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### Links

[1] <https://www.cu.edu/blog/ecommerce-wiki/import-csv-file-data-extension>

[2] <https://www.cu.edu/blog/ecommerce-wiki/author/39>

[3] <https://www.cu.edu/ecommerce/strategy/leadership>

[4] <https://www.cu.edu/blog/ecommerce-wiki/marketing-cloud-data-extension>