

Scheduling Data Extension Imports in Automation Studio

[1]



April 23, 2024 by [jennifer.mortensen](#) [2]

Many eComm users who send to data extensions might find themselves sending to the same audience on a regular basis, which generally means going through the time-consuming process of manually importing the data extensions to which you'll be sending. For example, the weekly CU Connections send from the Office of the President is sent to nine data extensions every week. In this case (or even for less extreme examples), searching through your list of data extensions and checking boxes to manually import them takes time. The solution? Marketing Cloud's Automation Studio.

[Feb. 15, 2024 Session](#) [3]

Passcode: v@Jcv7X*

[March 12, 2024 Session](#) [4]

Passcode: MpB?8&K*

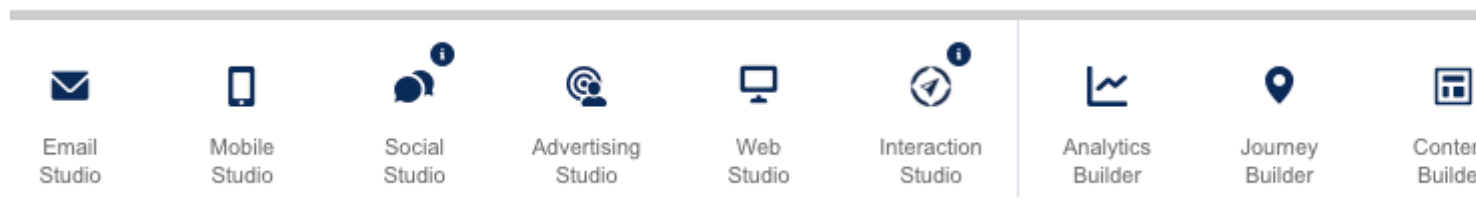
What is Automation Studio?

Automation Studio is one of the tools available in Marketing Cloud, just like its companion tool, Email Studio. Automation studio allows you to automate processes and email sends that you complete on a regular basis to save time and let technology do the manual work for you.

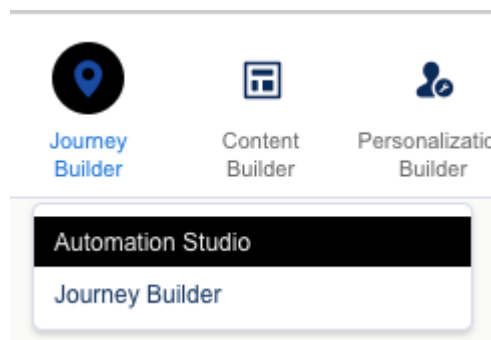
[Get in-depth details about Automation Studio](#) [5].

How do I find Automation Studio?

If you're already a Marketing Cloud user, you're probably used to navigating to Email Studio on an almost daily basis. Automation Studio can be accessed in the same way. When you login to Marketing Cloud and land on the homepage, you'll see the familiar Email Studio icon on the left and a new icon called **Journey Builder** just to the right of center.

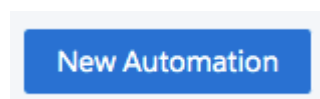


Hover over the **Journey Builder** icon, and then select **Automation Studio**.



How do I schedule a data extension to run automatically?

1. When Automation Studio opens, click the **New Automation** button in the upper right corner of the screen.



2. The next screen will ask you to identify a starting source for your automation from two options: **Schedule** or **File Drop**.



**Start with a
Starting Source**

Drag a Starting Source here

[Learn More](#)

STARTING SOURCES

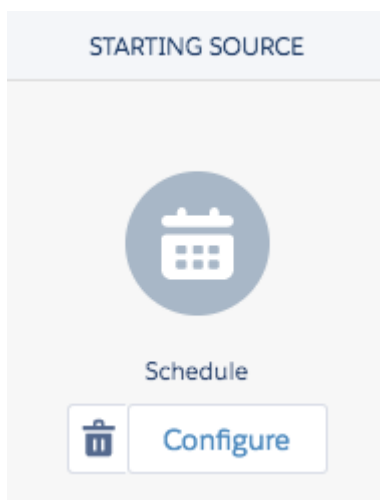


Schedule



File Drop

3. Click on the green **Schedule** option and drag it into the open circle.



4. Next, locate the **Import File** icon in the **Activities** menu. Drag and drop it to the activity canvas.

ACTIVITIES



Data Extract



Data Factory
Utility



File Transfer



Filter



Fire Event



Import File



Refresh Group



Refresh Mobile
Filtered List



Report
Definition



SQL Query



Salesforce
Email Send



Script

[Browse All Automations](#)

Untitled Automation

SUMMARY
 SEE AN OVERVIEW OF THIS AUTOMATION

WORKFLOW
 ✓ 1 UNDEFINED ACTIVITY

ACTIVITY
 NO ACTIVITY.

ACTIVITIES

Data Extract

Data Factory Utility

File Transfer

Filter

Fire Event

Import File

Refresh Group

Refresh Mobile Filtered List

Report Definition

SQL Query

Salesforce Email Send

Script

STARTING SOURCE

Schedule

Configure

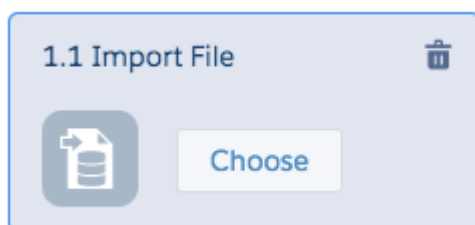
Step 1

ANNOTATIONS

1.1 Import File

Choose

5. To choose the data extension you want to schedule, click the **Choose** button in the **Import File** box.



6. In the **Choose Import File Activity** window, click on the data extension you want to schedule. You can also search for it using the search tool in the upper left corner. Once you've made a selection, ensure that you see the highlighted message, "**Overwrite Data Action Selected.**" This will ensure that your data extension is set to overwrite so it is always

populating with the most current data. When you are finished selecting your data extension, click **Done**.

More than one date extension? You'll only be able to select one data extension at a time. If you are hoping to schedule more than one data extension as part of a group, repeat steps 4-6 until you are finished.

Choose Import File Activity

Search Import File

IMPORT FILE

All Import File

NAME
✓ 2019 CU v Wash PRI SUB Events
2019 CU v Wash UCB SUB Events
TEST Mortensen
Neguse Breakfast SYS SUB Events
Neguse Breakfast UCD SUB Events
Neguse Breakfast PRI SUB Events
08 UREL OG Mel Jones
08 UREL OG RSVP Halloween 2019
2019 CU vs Stanford UCB SUB Events
2019 CU vs Stanford PRI SUB Events
08 UREL OG 1800 Emps SUB Event
08 UREL OG Natio

Details

Salesforce Integrated Import Activities are n go to the Interactions tab in Email Studio.

Overwrite Data Action Selected. This acti

Activity Info

Name	2019 CU v Wash PRI SUB
External Key	2019 CU v Wash PRI SUB
Email Notification	jennifer.mortensen@cu.e
Description	2019 CU v Wash PRI SUB

Destination

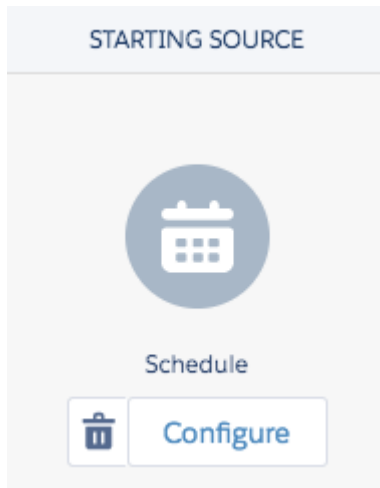
Data Extension	2019 CU v Wash PRI SUB
----------------	------------------------

Import File

File Location	Salesforce Objects & Rep
File Naming Pattern	sfreport 00Of4000007du
Date Format	English (United States)

Close

7. To schedule your data extension to automatically import, click on **Configure** under the **Schedule Starting Source**.



8. Enter the parameters for your import schedule in the **Define Schedule** window. Click **Done** when you are finished.

The image shows a window titled "Define Schedule". At the top, there is an information icon and a message: "After defining the schedule and then Saving the automation, it will be paused until you set the schedule toggle to Active. The automation can be manually run by clicking Run Once." Below this, the configuration options are as follows:

- Start Date:** A text field containing "11/04/2019" with a calendar icon to its right.
- at:** A text field containing "8:00 AM" with a dropdown arrow to its right.
- Time Zone:** A dropdown menu showing "(GMT-07:00) Mountain Time (US & Canada) *". Below this, a note states: "* Denotes this time zone honors daylight savings time".
- Repeat:** A dropdown menu showing "Weekly", followed by the text "every", a spinner box containing "1", and the text "week(s)".
- Days:** A row of seven buttons labeled "Sun", "Mon", "Tue", "Wed", "Thu", "Fri", and "Sat". The "Mon" button is highlighted.
- End:** A dropdown menu showing "After", followed by a spinner box containing "4", and the text "occurrence(s)".

At the bottom left of the window is a "Cancel" button.

9. Next, save your automation by clicking **Save** in the upper right corner. You can save in the "My Automations" folder, or you can (when you're ready) create a folder hierarchy to keep your automations organized.

Save Automation

Name*

Jen Mortensen Sample Automation

Description

This is a sample automation for the eComm wiki.

External Key

Jen Mortensen Sample Automation

Location

▼

my automations

eComm

Journey Builder Automations

> University Relations

Cancel

Save

10. Once your automation is saved, you'll notice that the schedule tab has an activity of **Paused**. Change the activity to **Active** to activate your automation. A confirmation window will appear to allow you to confirm that you want to activate the automation. Click **Activate**.

STARTING SOURCE

SCHEDULE



Edit

Active

✓ Paused

REPEAT:

Every 1 week

DAY(S) OF THE WEEK:

MO

STARTING:

11/04/2019 8:00 AM

ENDING:

after 4 times

TIME ZONE:


(GMT-07:00) Mountain
Time (US & Canada) *


The schedule is suspended
and must be activated for
scheduled runs to resume.

Skip Next Occurrence

STARTING SOURCE

SCHEDULE




[Edit](#)

☒ Active
 ☐ Paused

REPEAT:
 Every 1 week
 DAY(S) OF THE WEEK:
 MO
 STARTING:
 11/04/2019 8:00 AM
 ENDING:
 after 4 times
 TIME ZONE:
 (GMT-07:00) Mountain
 Time (US & Canada) *
 NEXT RUN:
 11/04/2019 8:00 AM
[Skip Next Occurrence](#)

11. Click **Save** one more time to ensure that your active automation is saved.

How often should I schedule my automated Data Extension to run?

Based on the sends using these Data Extensions, determine your automatic or manual run date. For example:

- If the email is delivered every Thursday at 6 AM
 - *Automatically scheduled to run 11 PM Wednesday*
- If the email is delivered every Monday AND random/unknown frequently (numerous times each week)
 - *Automatically schedule for every day outside business hours*
- If the email is delivered every Monday AND random/unknown infrequently (a few times each month)
 - *Automatically schedule for every Sunday, and start manually when needed*
- If the email is delivered at random/unknown/inconsistent frequency
 - *Start automation manually when needed or determine that it may not be an*

efficient use of time to automate the data extension(s).

How will I know if my automation failed or ran successfully?

1. Click the **Activity** tab in your automation. You'll see a **Notification Settings** option on the left side of the screen. **Enter your email address** in one or both of the notification fields. Click **Save** when you are finished.

The screenshot displays the Salesforce Automation Studio interface for an automation named "Jen Mortensen Sample Automation". The top navigation bar includes tabs for "SUMMARY", "WORKFLOW", and "ACTIVITY". The "SUMMARY" tab is active, showing a green checkmark, the date "11/1/2019", the time "1:26 PM", and the text "LAST SAVED". The "WORKFLOW" tab also shows a green checkmark, "1 ACTIVITY", and "IN 1 STEP". The "ACTIVITY" tab shows "NO ACTIVITY".

Below the navigation bar, the "Health" section displays a large grey circle representing the automation's status. To the right of the circle, the "Success Rate" is "0%" with "0 Completed" runs, and the "Error Rate" is "0%" with "0 Failed" runs. Below this, a message states "This automation has never run."

The "Notification Settings" section is located below the "Health" section. It contains instructions: "Enter email addresses to be notified upon the failure or success of the run. Separate multiple addresses with a comma." There are two notification settings: "Runtime Error or Skipped Run" and "Run Completion". Both settings have a text input field containing the email address "jennifer.mortensen@cu.edu" and a blue "Add note" link below each field.

On the right side of the interface, the "Run Log" section is visible. It includes a "View" button and a date selector set to "10/01/2019".

Activate again before closing Since you made a change to an existing automation, the automation activity will reset to Paused. Be sure to return to the Workflow tab to activate the automation and save again before exiting.

What will the Activity tab look like once my automation is running?

Once your automation has run at least one time, the **Activity** tab will begin to populate with a

history of your automation's activity. An example is included below. You'll notice that the average run time of the automation is only 15 seconds - much faster than if you were importing the data extension manually.


Jen Mortensen Sample Automation

SUMMARY
✓ 11/1/2019 1:41 PM
LAST SAVED

WORKFLOW
✓ 1 ACTIVITY
IN 1 STEP

ACTIVITY
11/1/2019 1:59 PM
COMPLETED

Health



Success Rate
100%
1 Completed

Error Rate
0%
0 Failed

Average Run Time15sReset

Notification Settings

Enter email addresses to be notified upon the failure or success of the run. Separate multiple addresses with a comma.

Runtime Error or Skipped Run

Add note

Run Completion


Add note

Run LogView10/01/2019

Run Once - Complete

Started: 11/01/2019 1:59 PM

Completed: 11/01/2019 at 1:59 PM



Automate Data Extensions

Marketing Cloud senders are required to re-Start Data Extensions before each send to ensure the audience is up-to-date (and CAN-SPAM compliant). If an Automation is configured to run the Data Extensions automatically, manually re-starting the Data Extensions before each send becomes obsolete. eComm specialists can automate defined Data Extensions and help users understand the change of process.

Feb. 15, 2023 Session [3]

Passcode: v@Jcv7X*

Common Use Cases

- Frequent sends to the same data extensions
 - Numerous sends to the same data extensions
- Numerous Data Extensions in a single send (frequency irrelevant)
- User Failing to Re'Start Data Extensions and Violating CAN-SPAM (although makes access questionable)
- Cannot be used when:
 - sending to Reports
 - importing Data Extensions ^[6](for email personalization or dynamic content based on data not available in Salesforce).

Identify Good Candidates for Automation Studio

1. **Find a communication that goes to the same audience (Data Extensions) regularly. Define all the Data Extensions.**
 - Are these Data Extensions used in other sends? Define all sends and their frequency then see 3 below.
2. **Based on the sends using these Data Extensions, determine your automatic or manual run date. For example:**
 - If the email is delivered every Thursday at 6 AM
 - *Automatically scheduled to run 11 PM Wednesday*
 - If the email is delivered every Monday AND random/unknown frequently (numerous times each week)
 - *Automatically schedule for every day outside business hours*
 - If the email is delivered every Monday AND random/unknown infrequently (a few times each month)
 - *Automatically schedule for every Sunday, and start manually when needed*
 - If the email is delivered at random/unknown/inconsistent frequency
 - *Start automation manually when needed or determine that it may not be an efficient use of time to automate the data extension(s).*
3. **Do other senders use these Data Extensions?**
 - If no, proceed.
 - If yes, communicate that they do not need to run these, but ONLY these Data Extensions. Email notifications will be disabled, therefore senders must confirm a recent successful 'run history' before sending.
 - If a user gets confused and fails to run any data extensions, we will likely have a CAN-SPAM violation. Only go this route if you trust the user will understand the different cases and follow the correct protocol.
 - If a user fails to re-run Data Extensions, you can automate all their Data Extensions to ensure CAN-SPAM is adhered to. However, it's worth considering if a user who cannot perform the basics should be licensed.
4. **Are those Data Extensions configured to notify? If so delete notification email.**
 - This email will get notified when Automation runs.
5. **Update description to include 'in Automation'.**
6. **Create Automation (instruction above) with a notification email to MEC (if troubleshooting is needed). Manually run to ensure success.**

Troubleshoot Failed Automation

An email notification can be sent every time the automation is skipped or run unsuccessfully. On occasion, an automation might fail due to one Data Extension failing which prevents the following Data Extensions in the automation from running. When an automation failure occurs, it's important to troubleshoot the failure and restart the automation until it is successful to ensure audience accuracy.

Related Content

- [How can I organize my work between Email Studio and Automation Studio?](#) ^[7]
- [How do I schedule a Salesforce Send Email in Automation Studio?](#) ^[8]

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[3]

https://cusystem.zoom.us/rec/share/Ncun7QJozJNottY9Ee_KYjdu6AH3Vw63G6gKNkNaTT8uG87yy9UhNR8SiJeQ2

[4]

https://cusystem.zoom.us/rec/share/EqRhWKFy0Q9UAuJkaHP5rbMs7s94sDjAmL_jCySeMnzyi0gHjwljvOr0M1dnwj

[5] <http://pages.mail.salesforce.com/gettingstarted/marketing-cloud/automation-and-journey-builder/>

[6] <https://www.cu.edu/blog/ecommerce-wiki/import-file-data-extension> [7] <https://www.cu.edu/blog/ecommerce-wiki/organizing-your-work-ongoing-automation-studio-sends>

[8] <https://www.cu.edu/blog/ecommerce-wiki/scheduling-salesforce-send-emails-automation-studio>