Create Marketing Cloud Data Extensions [1]

September 10, 2024 by melanie.jones@cu.edu [2]

Data Extensions is the term Marketing Cloud uses for an audience. The following wiki explains how to create a Data Extension. It's important to note that despite whoever creates the Data Extensions it's the sender's responsibility to re'Start' it before each send [3].

Create Salesforce Report

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

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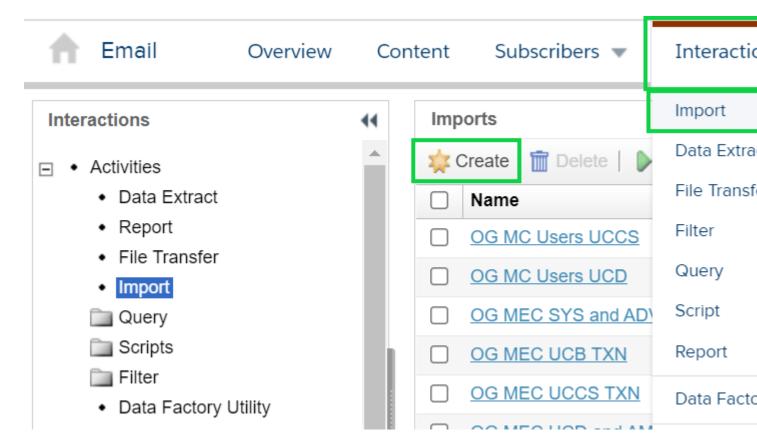 - Last name
  - others

Examples of Reports prepared for Data Extensions:

	Contact ID ↑	Student Preferred Name	Last Name	UCE
103	0C	Jack	A	ja
104	0C	Sarah	K	sa
105	0C	Sweta	A	sw

Create Data Extension

Follow along with the detailed instructions below and use the 1-pager as a quick reference [4] moving forward.

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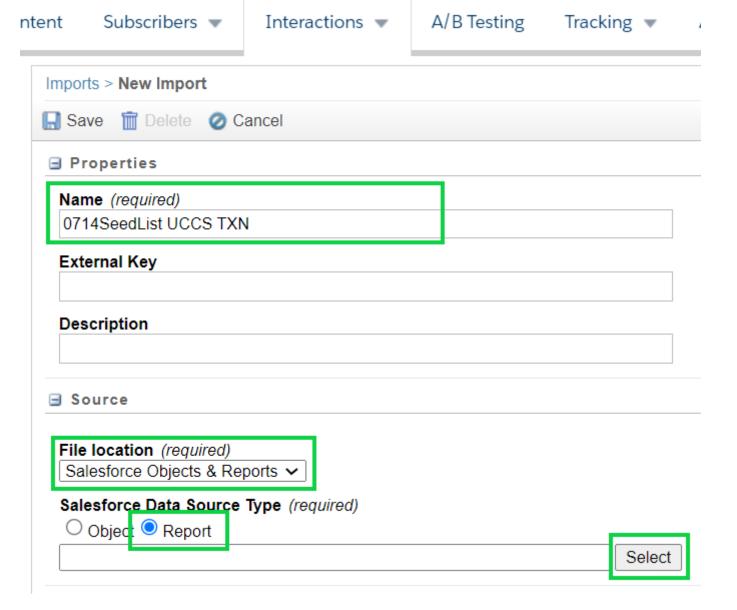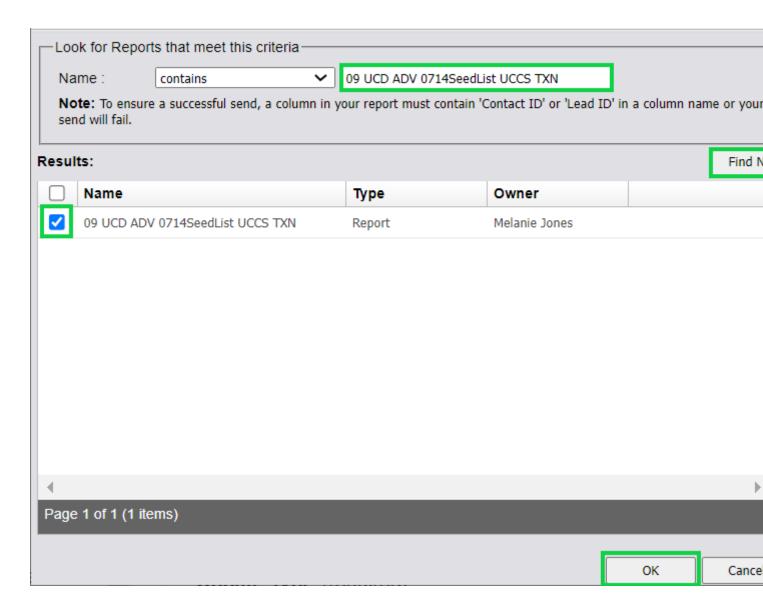- Click the **Create** button

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. 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
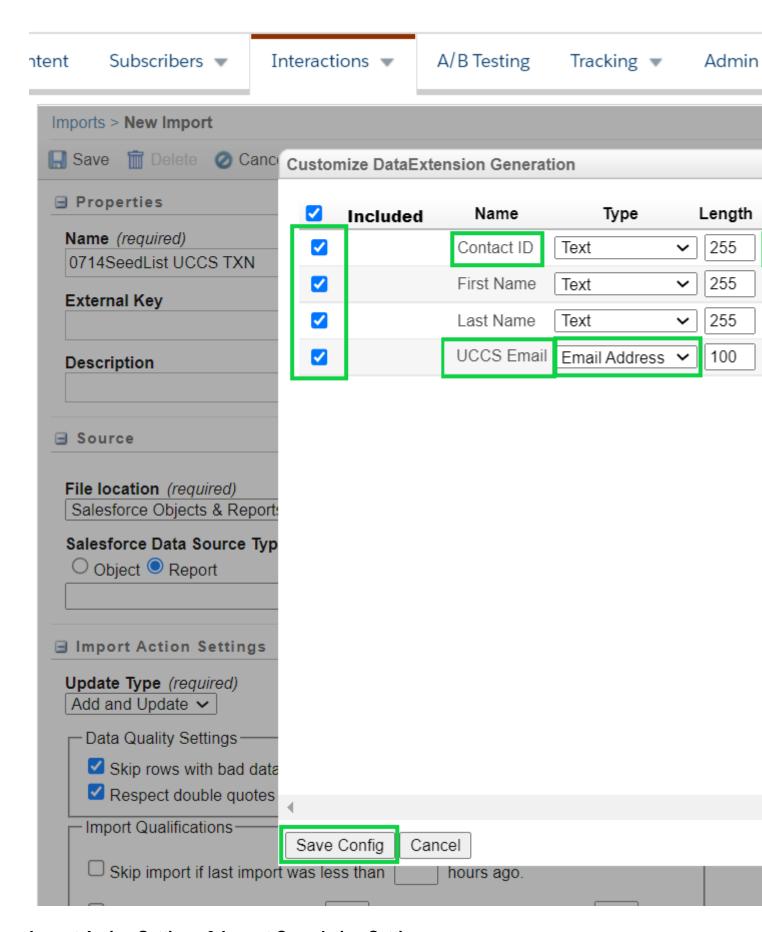- Click the **Select** button

- 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.
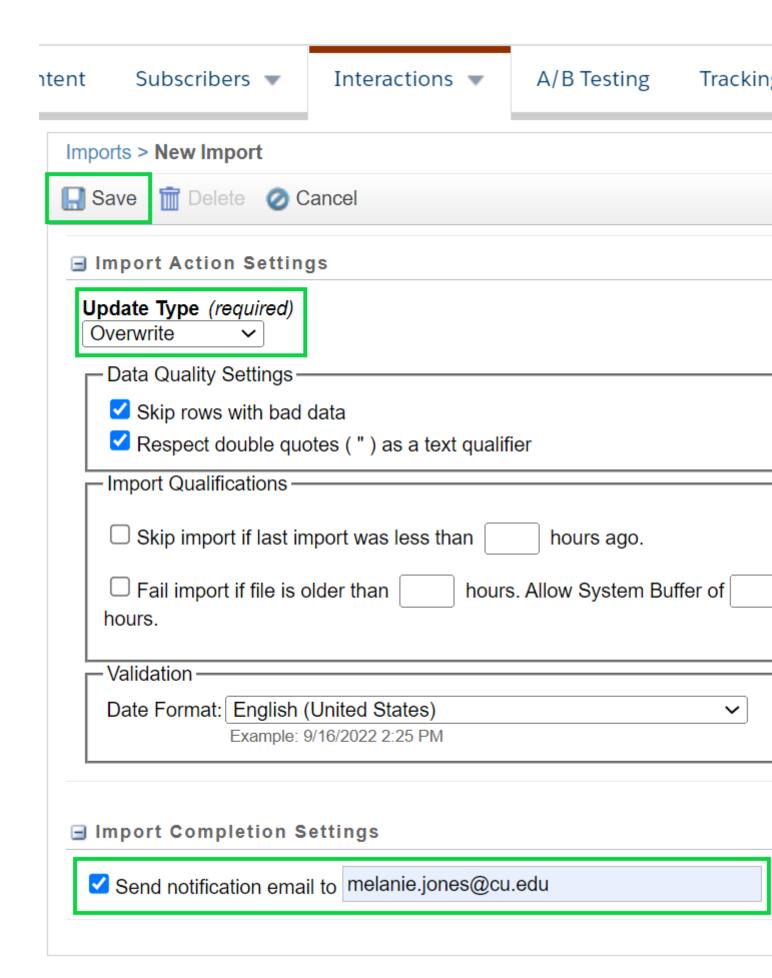
Configure Data Extension

- **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

Import Action Settings & Import Completion Settings:
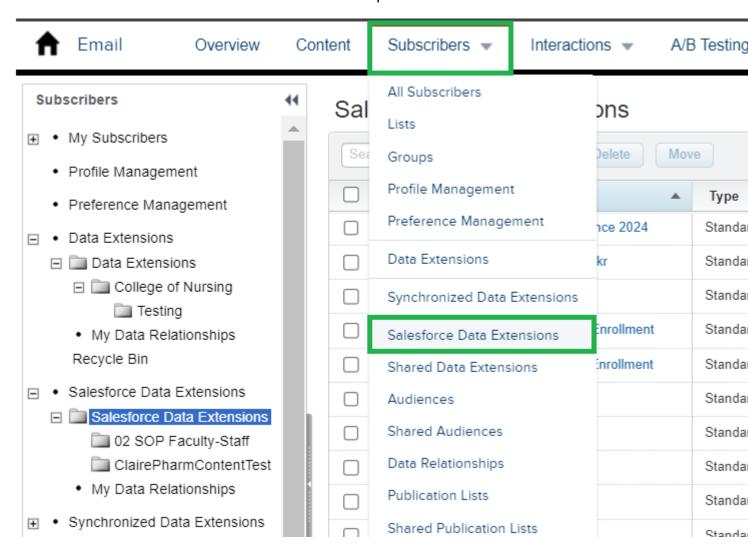
- Select **Update Type** of **Overwrite**

- 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 [5]
  - *This email address will be notified when the import completes, indicating success or failure.*
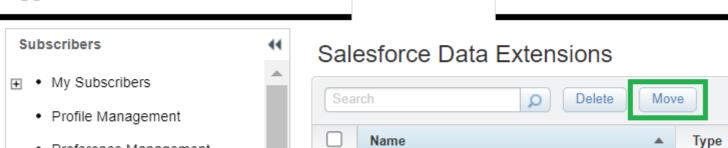- Select the **Save** button at the top of the screen

Move Data Extensions & Create Data Extension Folders

Move Data Extension

Data Extensions can be moved - for technical reasons and/or to stay organized while sending.
To move data extensions:

- Hover **Subscriber** in the top navigation.
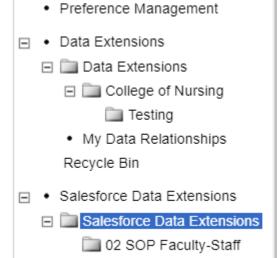- Select **Salesforce Data Extension** in the dropdown.

- **Check the box** next to the Data Extension you wish to move.
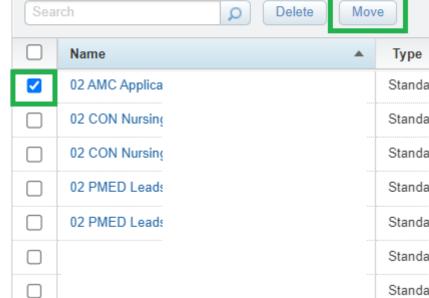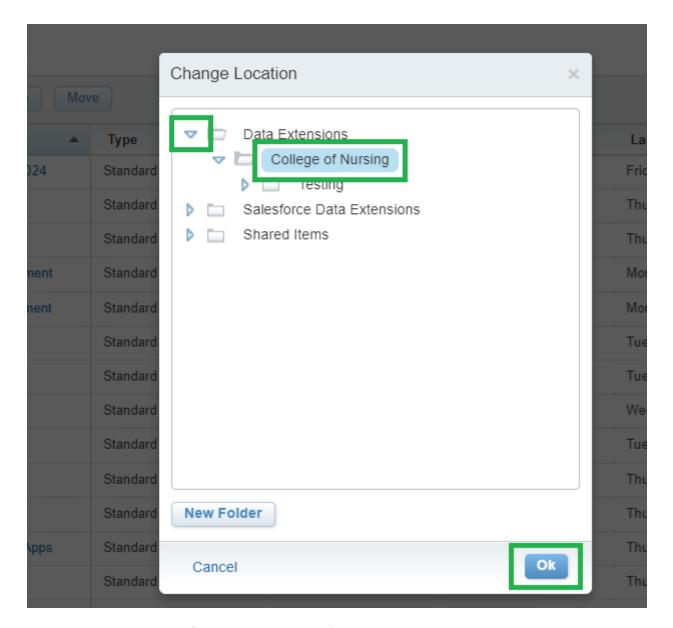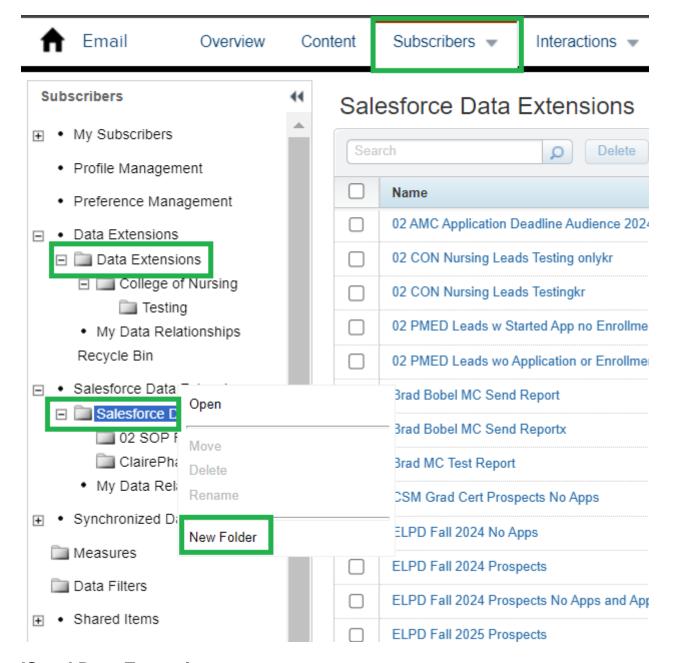- Click the **Move** button at the top.

- In the pop-up, click the **down arrow** to expand the folder.
- Click the **folder name** of the desired location so it's highlighted in blue.
- Select the **Ok** button in the bottom right.

- The **Data Extension Folder** is used for Journeys.
- The **Salesforce Data Extension Folder** is used for individual email sends.

Create Data Extension Folder

- Select **Subscriber** in the top navigation
- **Right-click on the Folder** you want the sub-folder to be under.
- In the pop-up, select **New Folder**
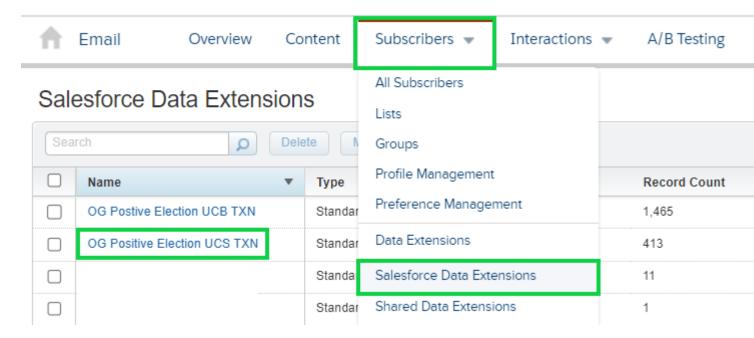
'Start' Data Extension

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 [5].
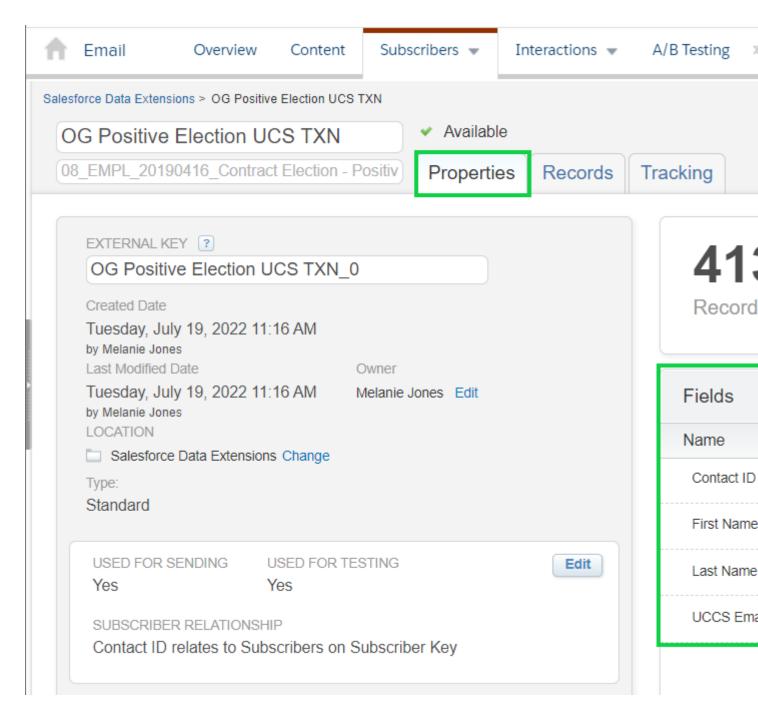
View Data Extension Data & Configuration

NOTEBasic users cannot do the following.

Interested in seeing how a Data Extension is configured or the Data that is present after being started?
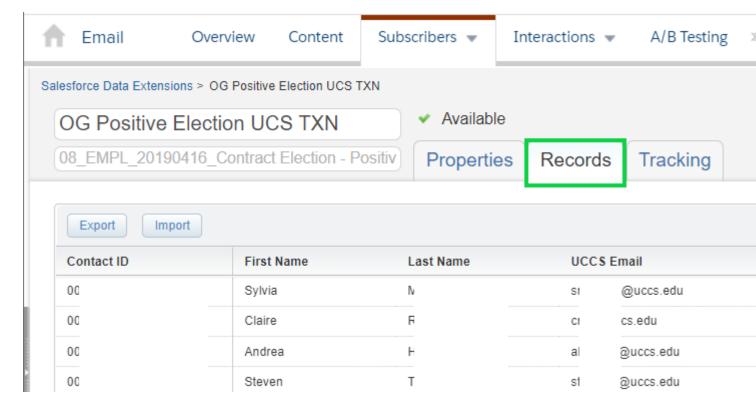
- Hover **Subscriber** and select **Salesforce Data Extensions** in the dropdown
- Click the **name of the Data Extension**

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

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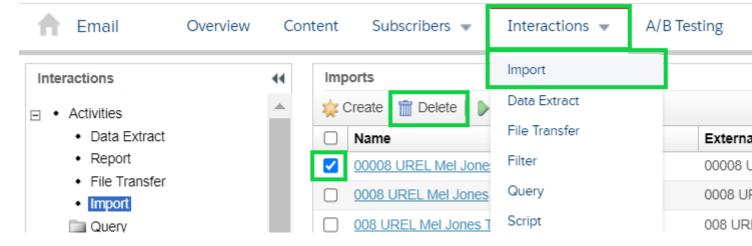
Delete Data Extension

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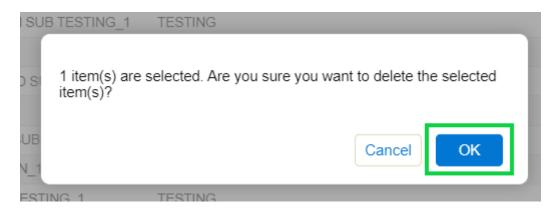
Data Extensions accidently created with 35+ characters While you will get an error if you accidentally (corrected spelling)create a Data Extension with more than 35 characters, the reality is that Data Extension will be visable when sending (although unusable). Only the second method of deletion (outlined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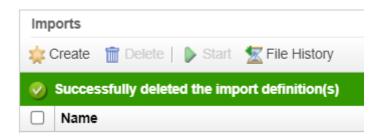
First

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

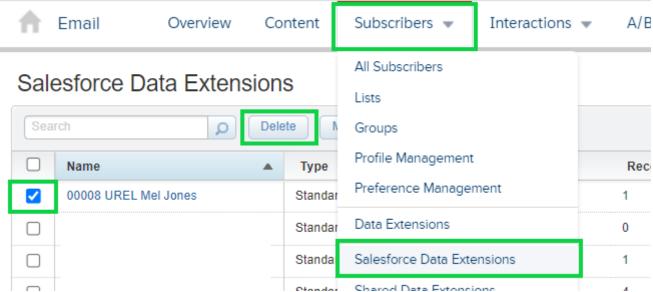- Select the blue **OK button** in the pop-up to confirm

- 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**

Display Title:

Create Marketing Cloud Data Extensions

Send email when Published:

No

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