Home > Create Marketing Cloud Data Extensions

# Create Marketing Cloud Data Extensions

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 1	Student Preferred Name 💌	Last Name	UCE
103	00	Jack	А	ja
104	OC	Sarah	К	sa
105	00	Sweta	А	SM

### **Create Data Extension**

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

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

🛧 Email	Overview	Con	tent	Su	bscribers 🔻	Interactio
Interactions		44	Imp	orts		Import
<ul> <li>Activities</li> </ul>		<b>^</b>	*	Create	🛅 Delete 🛛 🕽	Data Extra
Data Extract				Name		File Transf
<ul> <li>Report</li> </ul>				<u>OG M</u>	C Users UCCS	Filter
File Transfer				<u>OG M</u>	C Users UCD	Query
Query				<u>OG M</u>	EC SYS and AD	Script
Scripts		Ш		<u>OG M</u>	EC UCB TXN	Report
Filter				<u>OG M</u>	EC UCCS TXN	Data Facto
<ul> <li>Data Factory Ut</li> </ul>	unty			00.14		2

### 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

ntent	Subscribers 🔻	Interactions 💌	A/B Testing	Tracking 🔻 🛛
Impo	rts > New Import			
🔛 Sa	ave   🗇 Delete 🥝 C	ancel		
∃ P	roperties			
<b>Na</b> 07	me (required) 14SeedList UCCS TXN	N		
Ext	ernal Key			
Des	scription			
∃ S	ource			
File Sa	e location (required) llesforce Objects & Re	ports 🗸		
Sal	esforce Data Source Object   Report	Type (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—				
Na No ser	ame : contains ~ <b>ote:</b> To ensure a successful send, a column i nd will fail.	• 09 UCD ADV 071 n your report must c	4SeedList UCCS TXN ontain 'Contact ID' or 'Lead	ID' in a column na	ime or your
Resu	Its:				Find N
	Name	Туре	Owner		
	09 UCD ADV 0714SeedList UCCS TXN	Report	Melanie Jones		
4		_			•
Page	e 1 of 1 (1 items)				
				ОК	Cance

#### **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

ntent	Subscribers 🔻	Interact	ions 🔻	A	/B Testing	Tracking 🔻	,	Admin
Impo	rts > New Import							
📘 Sa	ave   m Delete 🥥 Ca	anci Custo	mize Data	Exter	ision Generat	tion		
B P	roperties		In almala		Name	Type		l ength
<b>Na</b>	me (required) 14SeedList UCCS TXN		Include	ea	Contact ID	Text	~	255
Ext	ternal Kev				First Name	Text	~	255
	lemantey				Last Name	Text	~	255
De	scription			- F	UCCS Email	Email Address	s 🗸	100
File Sa Sal	e location (required) alesforce Objects & Rep lesforce Data Source Object  Report Monort Action Setting	oort: Typ						
	date Type (required) dd and Update ✓ Data Quality Settings — ✓ Skip rows with bad o	data						
	moort Qualifications	( <del>8</del> 5 						
		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 [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

ntent Subscriber	s 🔻	Interactions 🔻	A/B Testing	Trackin				
Imports > New Impo	ort							
Save 🛅 Delete	e ⊘ C	Cancel						
Import Action Settings								
Update Type (req Overwrite	quired) ~							
■ Data Quality Se Skip rows w	ettings – /ith bad	data						
Respect do	uble que	otes ( " ) as a text qualif	ier					
Import Qualifica Skip import Fail import i	Import Qualifications  Skip import if last import was less than hours ago.  Eail import if file is older than hours. Allow System Buffer of							
hours.								
─ Validation ── Date Format: E	English Example:	(United States) 9/16/2022 2:25 PM		~				
⊟ Import Comple	etion S	ettings						
Send notificati	on ema	il to melanie.jones@cu	.edu					

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.

				_		
n Email Overv	iew Co	ontent	Subscribers 🔻	Interactio	ons 💌	A/B Testing
Subscribers	44	Sal	All Subscribers		ons	
	<b>^</b>	Sea	Groups		Delete	Move
Profile Management			Profile Managemen	t		
Preference Management			Preference Manage	ment	2024	Iype     Ctende
<ul> <li>Data Extensions</li> </ul>		U			1ce 2024	Standa
Data Extensions			Data Extensions		kr	Standa
College of Nursing			Synchronized Data	Extensions		Standa
My Data Relationships			Salesforce Data Ext	ensions	Enrollment	Standa
Recycle Bin			Shared Data Extens	ions	inrollment	Standa
Salesforce Data Extension	IS		Audiences			Standa
Salestorce Data Extens     02 SOP Faculty-Sta	aff		Shared Audiences			Standa
ClairePharmConter	ntTest		Data Relationships			Standa
<ul> <li>My Data Relationships</li> </ul>			Publication Lists			Standa
Synchronized Data Extens	sions		Shared Publication	Lists		Standa

- 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

f Email Overview	Conter	nt	Subscribers 👻	Interactions 👻
Subscribers	••	Sal	esforce Data I	Extensions
• My Subscribers         •				
Profile Management		568	arcn	Delete
Preference Management			Name	
<ul> <li>Data Extensions</li> </ul>			02 AMC Application D	eadline Audience 2024
<ul> <li>Data Extensions</li> <li>Data Extensions</li> </ul>			02 CON Nursing Lead	s Testing onlykr
College of Nursing			02 CON Nursing Lead	s Testinakr
Testing				
<ul> <li>My Data Relationships</li> </ul>		U	UZ PMED Leads w Sta	arted App no Enrollme
Recycle Bin			02 PMED Leads wo A	pplication or Enrollme
Salesforce Data			Brad Bobel MC Send	Report
Salesforce C     O2 SOP f				Reportx
ClairePha Delete			3rad MC Test Report	
My Data Reli     Rename			CSM Grad Cert Prosp	ects No Apps
Synchronized D: New Folder			ELPD Fall 2024 No Ap	ops
Measures			ELPD Fall 2024 Prosp	ects
🚞 Data Filters			ELPD Fall 2024 Prosp	ects No Apps and App
• Shared Items         •			ELPD Fall 2025 Prosp	ects

## 'Start' 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> [5].

## 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

<b>n</b>	Email Overvi	ew Co	ontent	Subscribers 👻	Interactions	<ul> <li>A/B Testing</li> </ul>
Sale	esforce Data Ex	tension	IS ete M	All Subscribers Lists Groups		
	Name	•	Туре	Profile Management	Record Count	
	OG Postive Election UCB	TXN	Standar	Preference Manager	ment	1,465
	OG Positive Election UCS	TXN	Standar	Data Extensions		413
			Standa	Salesforce Data Exte	ensions	11
			Standar	Shared Data Extensi	ons	1

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

n Email Over	rview Conte	nt Subscribers 👻	Interactions 👻	A/B Testing
Salesforce Data Extensions > 00 OG Positive Election 08_EMPL_20190416_0	G Positive Election I ion UCS TXI Contract Election	JCS TXN Availa n - Positiv Prope	able rties Records	Tracking
EXTERNAL KEY ? OG Positive Elect Created Date Tuesday, July 19, 20 by Melanie Jones Last Modified Date Tuesday, July 19, 20	022 11:16 AM	N_0 Owner Melanie Jones Edit		41 Record
LOCATION Salesforce Data Ex Type: Standard	xtensions Change			Name Contact ID First Name
USED FOR SENDING	G USED FOR	RTESTING	Edit	Last Name
SUBSCRIBER RELAT	TIONSHIP to Subscribers of	on Subscriber Key		UCCS Ema

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

1	Email	Overview	Content	Sub	scribers 💌	In	teractions 👻	A/B Testing	g >
Sa	alesforce Data Ext	ensions > OG Positive	Election UCS	TXN					
	OG Positiv	ve Election UC	CS TXN		🔹 Availabl	le			
	08_EMPL_20	0190416_Contract	t Election - F	Positiv	Properti	es	Records	Tracking	
	Export	Import							
	Contact ID	First	Name		Last Name		UCCS Er	nail	
	00	Sylvia	3		N		SI	@uccs.edu	
	00	Claire	9		F		CI	cs.edu	
	00	Andre	ea		Н		al	@uccs.edu	
A	00	Steve	en		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



• 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

Ħ	Email Overview	Content	Subscribers 💌	Interactions	▼ A/B
Sale	esforce Data Extensio	All Subscribers			
Sea	rch p	Lists Groups			
	Name	🔺 Туре	Profile Management	Profile Management	
	00008 UREL Mel Jones	Standar	Preference Manager	nent	1
		Standar	Data Extensions		0
		Standa	Salesforce Data Exte	ensions	1
Dicploy		Ctandar	Charod Data Extonci	000	A

## Display Title:

Create Marketing Cloud Data Extensions

Send email when Published:

No

Source URL: https://www.cu.edu/blog/integrated-online-services/create-marketing-cloud-data-extensions

#### Links

[1] https://www.cu.edu/blog/integrated-online-services/create-marketing-cloud-data-extensions
[2] https://www.cu.edu/blog/integrated-online-services/author/145641
[3] https://www.cu.edu/blog/integrated-online-services/use-marketing-cloud-data-extensions
[4] https://www.cu.edu/doc/072024data-extension-1-pagerpdf?download=true
[5] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-data-extensions