

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

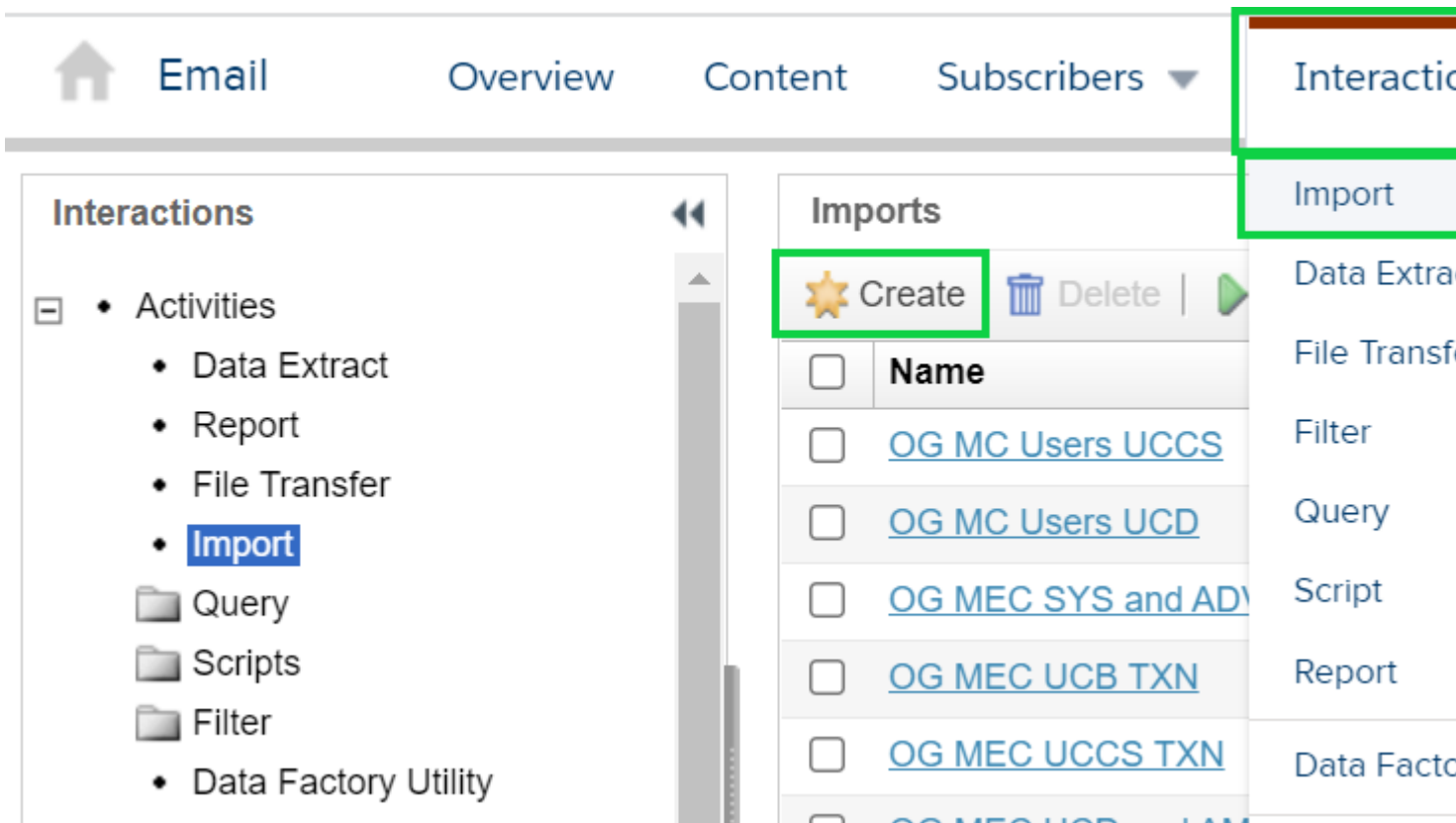
Examples of Reports prepared for Data Extensions:

	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

Imports > New Import

 Save  Delete  Cancel

 Properties

Name *(required)*

0714SeedList UCCS TXN

External Key

Description

 Source

File location *(required)*

Salesforce Objects & Reports ▼

Salesforce Data Source Type *(required)*

☐ Object ☒ Report

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 bottom of the pop-up.

Look for Reports that meet this criteria

Name :

Note: To ensure a successful send, a column in your report must contain 'Contact ID' or 'Lead ID' in a column name or your send will fail.

Results: Find N

☐	Name	Type	Owner
☒	09 UCD ADV 0714SeedList UCCS TXN	Report	Melanie Jones

Page 1 of 1 (1 items)

OK Cancel

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

Imports > New Import

Save Delete Cancel

Customize DataExtension Generation

☒	Included	Name	Type	Length
☒		Contact ID	Text ▾	255
☒		First Name	Text ▾	255
☒		Last Name	Text ▾	255
☒		UCCS Email	Email Address ▾	100

Properties

Name (required)
0714SeedList UCCS TXN

External Key

Description

Source

File location (required)
Salesforce Objects & Reports

Salesforce Data Source Type
☐ Object ☒ Report

Import Action Settings

Update Type (required)
Add and Update ▾

Data Quality Settings

☒ Skip rows with bad data

☒ Respect double quotes

Import Qualifications

☐ Skip import if last import was less than hours ago.

Save Config Cancel

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

Imports > New Import



Save



Delete



Cancel

Import Action Settings

Update Type *(required)*

Overwrite ▼

Data Quality Settings

- ☒ Skip rows with bad data
- ☒ Respect double quotes (") as a text qualifier

Import Qualifications

- ☐ Skip import if last import was less than hours ago.
- ☐ Fail import if file is older than hours. Allow System Buffer of hours.

Validation

Date Format: English (United States) ▼

Example: 9/16/2022 2:25 PM

Import Completion Settings

- ☒ Send notification email to

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.

The screenshot shows the Salesforce Marketing Cloud interface. At the top, the navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', and 'A/B Testing'. The 'Subscribers' menu is open, displaying a list of options: 'All Subscribers', 'Lists', 'Groups', 'Profile Management', 'Preference Management', 'Data Extensions', 'Synchronized Data Extensions', 'Salesforce Data Extensions', 'Shared Data Extensions', 'Audiences', 'Shared Audiences', 'Data Relationships', 'Publication Lists', and 'Shared Publication Lists'. The 'Salesforce Data Extensions' option is highlighted with a green box. On the left, the 'Subscribers' sidebar shows a tree view with 'Salesforce Data Extensions' selected. On the right, a table of data extensions is visible, with columns for 'Name' and 'Type'. The table includes entries like 'Enrollment 2024', 'Enrollment', and 'Enrollment', all of type 'Standard'.

Name	Type
Enrollment 2024	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard
Enrollment	Standard

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



Subscribers

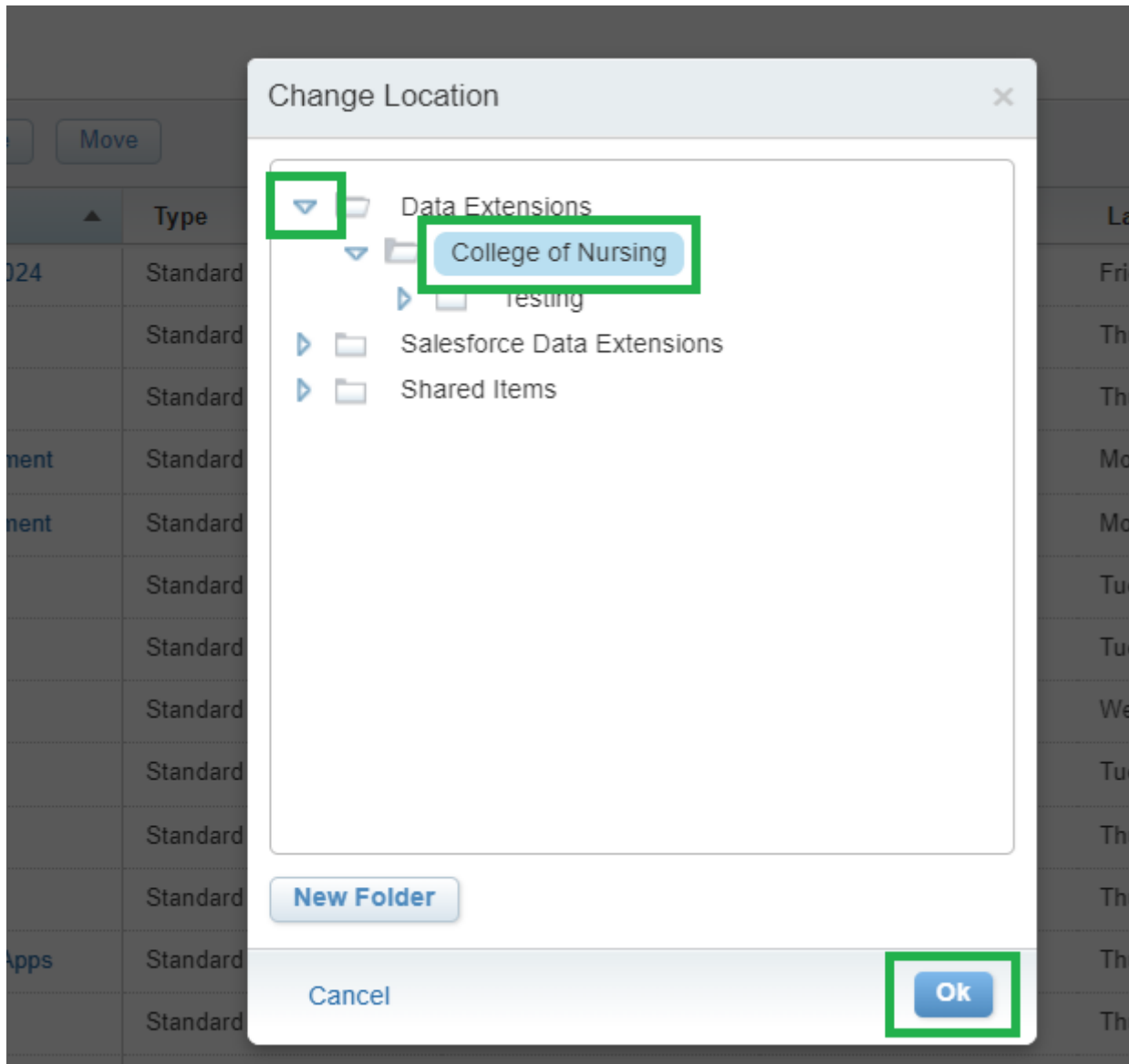
- My Subscribers
- Profile Management
- Preference Management
- Data Extensions
 - Data Extensions
 - College of Nursing
 - Testing
 - My Data Relationships
 - Recycle Bin
- Salesforce Data Extensions
 - **Salesforce Data Extensions**
 - 02 SOP Faculty-Staff

Salesforce Data Extensions

[Delete](#)[Move](#)

☐	Name ▲	Type
☒	02 AMC Applica	Standa
☐	02 CON Nursing	Standa
☐	02 CON Nursing	Standa
☐	02 PMED Leads	Standa
☐	02 PMED Leads	Standa
☐		Standa
☐		Standa

- 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**

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**

Navigation: [Home](#) [Email](#) [Overview](#) [Content](#) **Subscribers** [Interactions](#) [A/B Testing](#)

Salesforce Data Extensions

Search [Delete](#) [More](#)

☐	Name	Type	Record Count
☐	OG Postive Election UCB TXN	Standard	1,465
☐	OG Positive Election UCS TXN	Standard	413
☐		Standard	11
☐		Standard	1

All Subscribers
 Lists
 Groups
 Profile Management
 Preference Management
 Data Extensions
Salesforce Data Extensions
 Shared Data Extensions

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

Navigation: [Home](#) [Email](#) [Overview](#) [Content](#) [Subscribers](#) [Interactions](#) [A/B Testing](#)

Salesforce Data Extensions > OG Positive Election UCS TXN

OG Positive Election UCS TXN ✓ Available

08_EMPL_20190416_Contract Election - Positiv **Properties** Records Tracking

EXTERNAL KEY ?

OG Positive Election UCS TXN_0

Created Date
Tuesday, July 19, 2022 11:16 AM
by Melanie Jones

Last Modified Date
Tuesday, July 19, 2022 11:16 AM
by Melanie Jones

Owner
Melanie Jones [Edit](#)

LOCATION
 Salesforce Data Extensions [Change](#)

Type:
Standard

USED FOR SENDING
Yes

USED FOR TESTING
Yes

[Edit](#)

SUBSCRIBER RELATIONSHIP
Contact ID relates to Subscribers on Subscriber Key

413
Records

Fields

Name
Contact ID
First Name
Last Name
UCCS Email

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

The screenshot shows the Salesforce Data Extensions interface. At the top, there is a navigation bar with tabs: Email, Overview, Content, Subscribers (selected), Interactions, and A/B Testing. Below this, the breadcrumb path is 'Salesforce Data Extensions > OG Positive Election UCS TXN'. The main header area displays 'OG Positive Election UCS TXN' with a green checkmark and the word 'Available'. Below the header, there are three tabs: 'Properties', 'Records' (highlighted with a green box), and 'Tracking'. Under the 'Records' tab, there are 'Export' and 'Import' buttons. Below these buttons is a table with the following data:

Contact ID	First Name	Last Name	UCCS Email
00	Sylvia	M	sl @uccs.edu
00	Claire	F	cl cs.edu
00	Andrea	H	al @uccs.edu
00	Steven	T	sl @uccs.edu

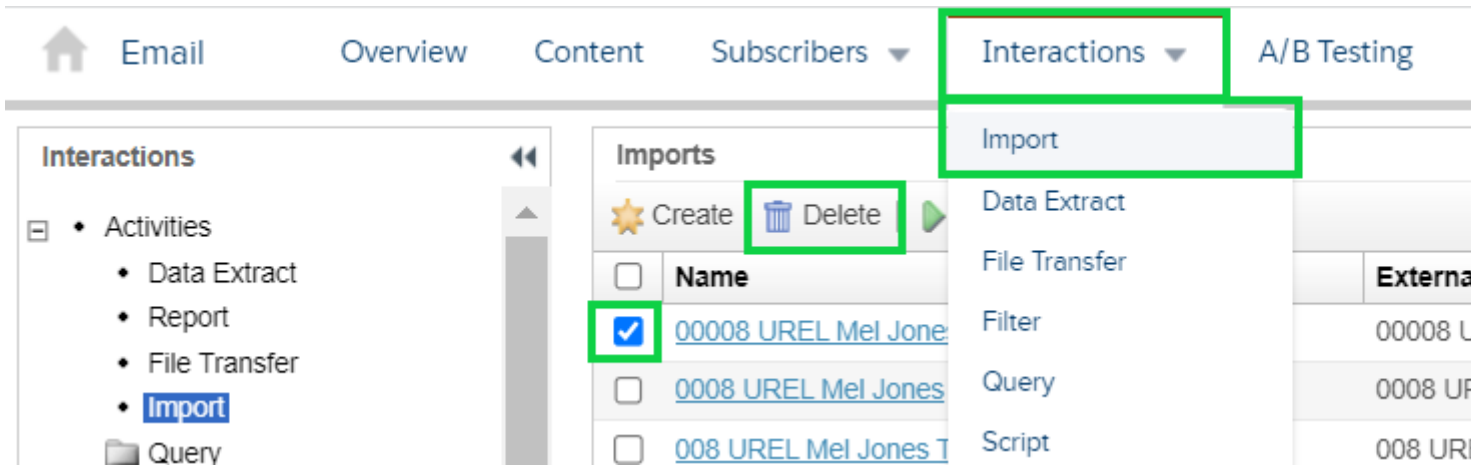
Delete Data Extension

Data Extension must be deleted in two different places. Failure to do so will result in confusion, including the Data Extension still being visible when sending (although unusable, resulting in a failed send).

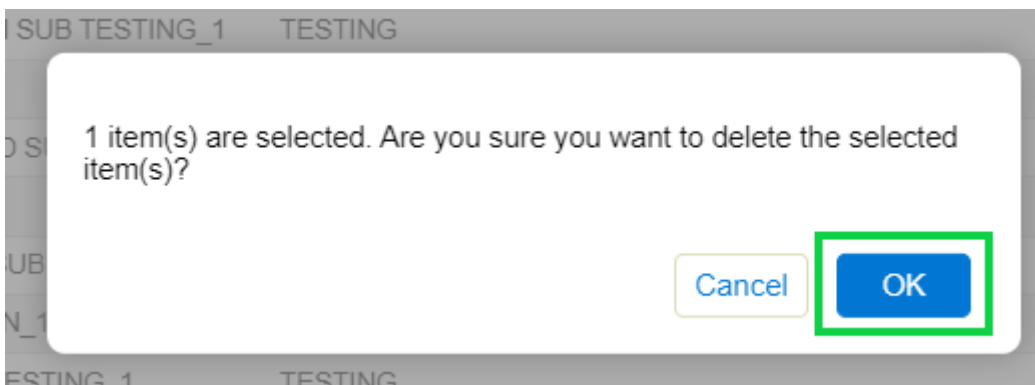
Data Extensions accidentally created with 35+ characters While you will get an error if you accidentally (corrected spelling) create a Data Extension with more than 35 characters, the reality is that Data Extension will be visible when sending (although unusable). Only the second method of deletion (outlined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

First

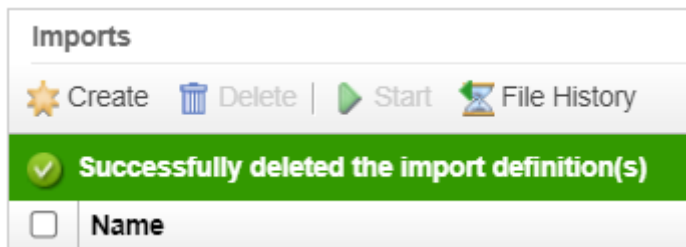
- Hover **Interactions**, then select **Import** in the dropdown
- **Check the box** next to the Data Extension and click the **Delete** button



- 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**

