

Audience Creation Checklist

Salesforce



Campaign (if relevant)

- Create Campaign

Follow Naming Convention, Quality Description, Type = Email, Active=Checked

- Share Campaign with Public Group
- Import Campaign Members to Campaign

Salesforce



Report (required)

- Create Report ('Save As' Existing Report or Use Report Template*)

Follow Naming Convention, Quality Description, Correct Filter Criteria, TXN vs Commercial

- Save to Correct Folder
- Creating a Data Extension?

Include Columns: Contact ID, Relevant Email Address, Any Data for Personalization or Dynamic Content

[*cu.edu/ecomm/salesforce-reporting](https://cu.edu/ecomm/salesforce-reporting)

Marketing Cloud



Data Extension (if relevant)

- Create Data Extension (Interactions >> Import >> Create)

Include Columns: Contact ID = Key, Relevant Email Address: Data Type = Email Address, Any Data for Personalization or Dynamic Content

- Move Data Extension to Folder (Subscriber >> Salesforce Data Extensions)
- 'Start' Data Extension Before Sending (Sender's Responsibility)