

# Smart Campaign Checklist

Follow the below steps to ensure smooth running of the smart campaign and prevent errors as much as possible.



## FYI

Marketo is now standardizing language across all subscriptions, so you may see lead/leads in your subscription and person/people in docs.marketo.com. These terms mean the same thing; it does not affect article instructions. There are some other changes, too. [Learn more.](#)

## What's in this article?

1. [Get Rid of Smart List Errors](#)
2. [Get Rid of Flow Errors](#)
3. [Review the Schedule Tab](#)
4. [Check Person Restrictions Limit](#)

## 1. Get Rid of Smart List Errors

In your smart campaign, click on **Smart List**. Get rid of any red squiggly lines that you see by fixing the errors.

The screenshot shows the Marketo Smart Campaign interface. At the top, there are tabs for 'My New Smart Campaign', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs, there are buttons for 'New', 'Campaign Actions', and 'View Campaign Members'. A hand icon with the number '1' points to the 'Smart List' tab. Below these buttons, there are options for 'Use ALL filters', 'Collapse All', and 'Expand All'. The main content area shows a filter rule titled '1 - Member of Program'. It has two conditions: 'Member of Program: true' and 'Program: is'. The second condition has a red squiggly line under the 'is' operator, indicating an error. A hand icon with the number '2' points to the red squiggly line. There is also an 'Add Constraint' button in the top right corner of the filter rule area.



## Tip

Red squiggly lines indicate errors or missing information. If not corrected, the campaign will be invalid and won't run.

Also, **keep things simple**. If you have dozens or hundreds of filters, it's hard to maintain it and keep track. Fewer filters are also faster to load.



## Reminder

Using **Member of Smart List** could have errors in that other list. Check there too.

## 2. Get Rid of Flow Errors

In your smart campaign, click on **Flow**. Get rid of any red squiggly lines you see by fixing the errors.

My New Smart Campaign   Smart List   **Flow**   Schedule   Results

New   Campaign Actions   View Campaign Members

Collapse All   Expand All

1 - Change Program Success

Add Choice

Choice 1

If: Was Sent Email is Email with Landing Page

Program: Email with Landing Page   Attribute: Success

New Value: false

Default Choice

Program: Email with Landing Page   Attribute: Success

New Value: false

Note: This will only affect existing members of the program

## Tip

Hover over the red squiggly line to see details of the error.



## 3. Review the Schedule Tab

In the **Schedule** tab, check **Smart List Status** for any errors in the smart campaign that needs fixing.

My New Smart Campaign   Smart List   Flow   **Schedule**   Results

New   Campaign Actions   Run Once   Schedule Reference   Edit Settings

## Batch Campaign Schedule

Campaign Status:   Last run: Jul 8, 2014 3:46 PM PDT

Smart List Mode:   Batch

**Smart List Status:   One or more invalid rules. Please fix before running campaign.**

Around [168 people are blocked from mailings](#)

Smart Campaign Settings   **EDIT**

**If person has been in this Smart Campaign before**  
Each person can run through the flow once

#### 4. Check Person Restrictions Limit

In the **Schedule** tab, make sure the number of qualified people does not exceed the person restriction limit.

My New Smart Campaign   Smart List   Flow   **Schedule**   Results

New   Campaign Actions   Run Once   Schedule Reference   Edit S

## Batch Campaign Schedule

Campaign Status:   Last run: Jul 8, 2014 3:46 PM PDT

Smart List Mode:   Batch

Smart List Status:   **Set to affect around 542 existing people** may change over time  
Around 168 people are blocked from mailings

Smart Campaign Settings   **EDIT**

**If person has been in this Smart Campaign before**  
Each person can run through the flow once

**If person has reached the communication limits**  
Ignore limit

**If total campaign exceeds 200 people**  
Abort entire smart campaign

### Tip

If required, you can [override person restrictions in a smart campaign](#).

### Reminder

If your smart campaign still fails, learn how to [understand notifications](#) to figure out what went wrong and how to fix it.

Great job! Keep this checklist handy before running a smart campaign.