Folders in Marketing Cloud [1]

April 8, 2022 by Melanie Jones [2]

We know how cluttered your Marketing Cloud account can get if you are a frequent sender. Use these different types of folders (and other tips) to stay organized.

**Content Builder Folders**

- Navigate to Email Studio >> Content Builder. On the left panel folders are listed.
- To add a new folder:
  - Right click the top, **Content Builder** folder
  - Select **Create Folder** in the dropdown
In the pop-up, give a name to the folder.
Click the blue Create button in the bottom right.
The new folder will be listed in alphabetical order.

NEST FOLDERS  Folders can be created within other folders. To do so, simply right click on
the folder name rather than the Content Builder folder.

Need to move content from one folder to another? There are two methods:

- **Move Content in Bulk**
- **Move Content Individually**

- **Check the box** on the left of the content (multiple can be selected)
- **Click the Action(s) button** in the top right
- **Select Move** in the dropdown

<table>
<thead>
<tr>
<th>NAME</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEC Weekly Digest 041122</td>
<td>Digest</td>
</tr>
<tr>
<td>MEC Weekly Digest</td>
<td>April 11, 2022</td>
</tr>
<tr>
<td>08_OIT_4.7.22_training-invitation</td>
<td>Content Builder</td>
</tr>
<tr>
<td>You're Invited to CU at the Zoo!</td>
<td></td>
</tr>
<tr>
<td>OIT_footer_test</td>
<td>New User Training</td>
</tr>
<tr>
<td>2022_04-06 CU Connections Email</td>
<td>08</td>
</tr>
<tr>
<td>CU Connections, April 8 issue, is here</td>
<td></td>
</tr>
</tbody>
</table>

- **Select the quick action down arrow** on the far right side of the piece of content you want to move.
- **Click Move** in the dropdown
Salesforce Send Folders

There’s two ways to send emails through Marketing Cloud. Guided Send (with a step-by-step wizard) and Salesforce Send Emails. Both methods get your email out the door, but I prefer Salesforce Send Emails to help stay organized. You can name email sends and create a custom folder structure (how-to below).

If you’re used to scheduling Salesforce Send emails, your Marketing Cloud Salesforce Send Email screen might look something like the example below with:

- one Salesforce Email Send with a **unique name for each send**.
  - You can avoid this redundant effort with a slightly different (and more organized) approach.
1. Create subfolders under the Salesforce Send Email parent folder.

- From Email Studio hover Interactions then click Salesforce Send Email in the dropdown

- Right click on the Salesforce Send Email folder in the left navigation pane
• **Select New Folder** in the dropdown and proceed to organize your work as desired.
  - *For this example, we’ve grouped our work into Monthly, Weekly, and Periodic Sends.*

2. From there, you can **create new Salesforce Sends in the desired folder**.
  - *For example, after clicking into our 'Weekly Sends' folder, we created two Salesforce Send Emails reflecting our two regular, weekly messages: one communication for CU's eComm Specialists, and other for CU Connections.*
Build your weekly Salesforce Send Email as you normally would - select your audiences, your send classification, delivery profile, etc.

- For the content, just select the email that you last sent that falls into this weekly category. Since you aren’t scheduling anything yet, there’s no risk in connecting a previously sent message to your Salesforce Send Email configuration. We’ll update the content before actually sending the message.

- When you’re done, Save your work.

3. When you’re ready to send or schedule the content you create (each week in our example), modify your Salesforce Send Email so that it points to the correct content.

- **TIP!** You can also change the name of the weekly send to reflect the date associated with it.
  - For example, we modified ‘Weekly Send - CU Connections’ to ‘Weekly Send - CU Connections 103119’. We update that date every week.

**REMINDER** If you make ANY changes to your email content after saving your Salesforce Send Email, you’ll need to re-select your content in the send configuration to ensure that the changes are captured.

**Data Extension Folder**

**Only eComm specialists and Super users have access to move Data Extensions.**

Do you have numerous Data Extensions in your Marketing Cloud account? Create folders to organize your Data Extensions to make finding your audience easier when sending.

- From Email Studio, hover **Subscribers** in the navigation
- Click **Salesforce Data Extensions** in the dropdown
Use the panel on the left to:

- **Create New Folders** | right click on the **Salesforce Data Extensions parent folder** and click **New Folder** in the dropdown
- Name your new folder
  - The new folder will order alphabetically automatically.
- **Move Data Extensions** | from the Salesforce Data Extension Folder **Check** the Data Extensions then select **Move** in the top

- In the pop-up, **select Salesforce Data Extension** to expand the sub-folders
- **Select the folder** you want the Data Extension(s) moved to
- **Click Ok**
EXAMPLES

CATEGORIES | Email Preference Category, communications, commercial vs. transactional, audience Affiliation, internal/external audience, etc.

OTHER COMMON FOLDERS | Testing, TXN (for Transactional audiences)

View the folders structure when sending your Marketing Cloud message, via the Guided Send wizard or Salesforce Send Emails.

- Guided Send
- Salesforce Send Email
Tracking Folders

Tracking folders makes grouping related sends together possible - so comparing their success against each other is easy.
Create Tracking Folders

- Hover **Tracking** in the top navigation
- Click **Sends** in the dropdown

- Right click on the **My Tracking folder** displayed in the panel on the left
- Select **New Folder**
• **Name the folder**
  ○ Folders will automatically order alphabetically

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**Place Emails in Tracking Folders**

- Moving Forward
- Retroactively

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**Guided Send**

The Configure Delivery phase of the Guided Send wizard is used to control the send timing.

- You can also **Change** the **Tracking Destination Folder** here.
Send Email

Send Timing

- Send Immediately
- Schedule

Select Date at

(GMT-07:00) Mountain Time (US & Canada)

* Denotes this time zone honors daylight savings time

Send Throttling

- Choose the desired folder and click Select

Salesforce Send Email

- Choose the Tracking Destination Folder by scrolling to the bottom of your Salesforce Send.
From Email Studio >> Tracking >> Sends

Check the box next to the passed Email Sends that you wish to move
• Select **Move**

• In the pop-up, **select the folder** you wish to move the Email Sends to.
• Select the **move** button
IMPORTANT Users can Delete and Rename folders as well as nest folders within other folders. If deleting a folder, ensure it is empty or it's contents may also be deleted. Deleted items can be restored from the recycling bin for 30 days.

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