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 botton 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
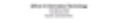
the folder name rather than the Content Builder folder.

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

- 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) [3] and Salesforce Send Emails [4]. Both methods get your email out the door, but I prefer Salesforce Send Emails to help stay organized. You can 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.*
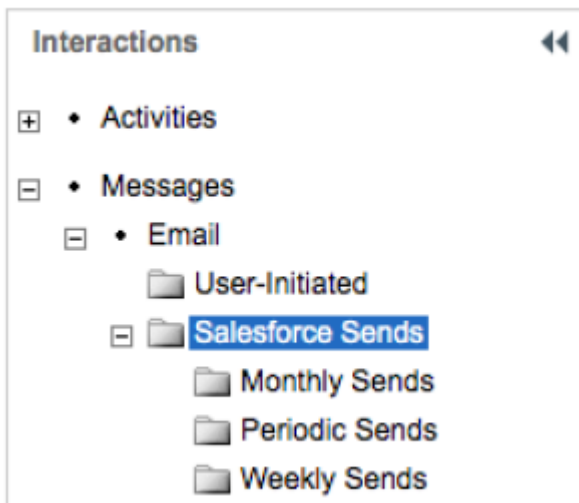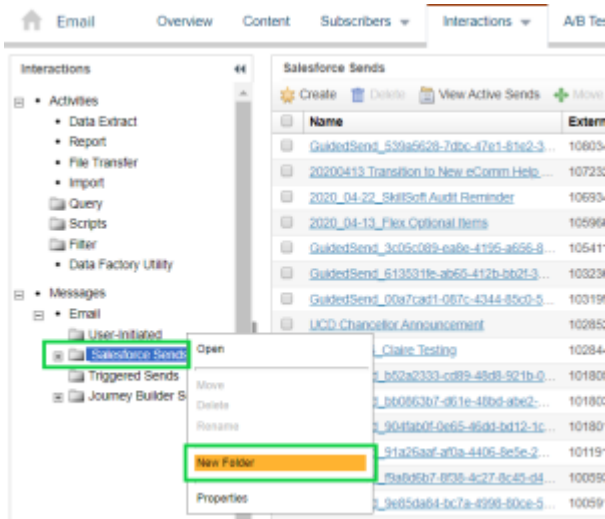
2. From there, you can **create new Salesforce Sends in the desired folder**.

- *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 <u>Salesforce Send Email</u> [4] 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**
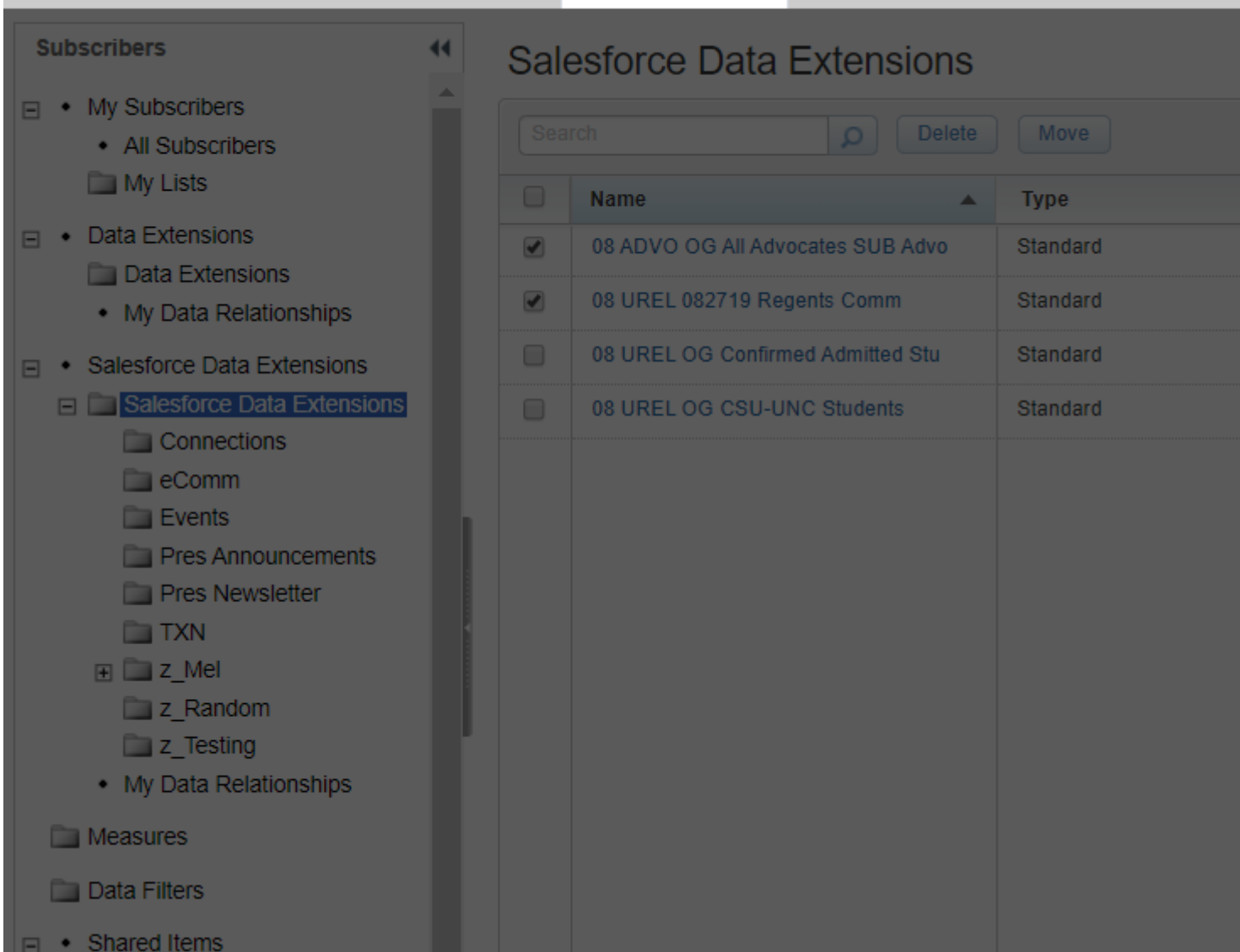
EXAMPLES

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 wheen sending your Marketing Cloud message, via the Guided Send wizard or Salesforce Send Emails.

- Guided Send
- Salesforce Send Email
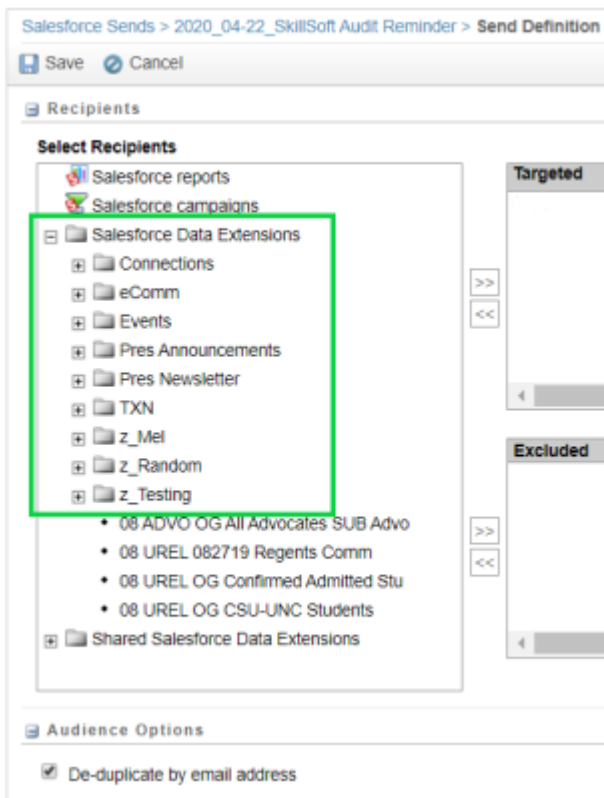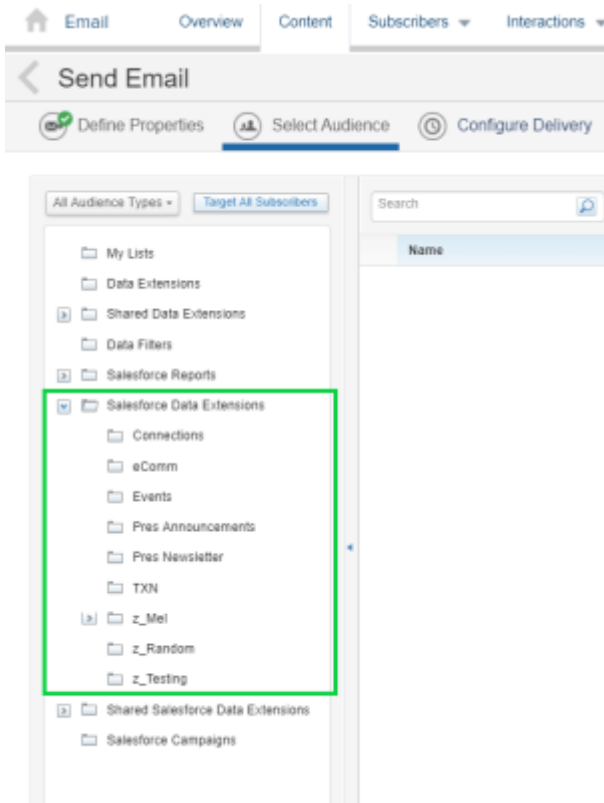
Tracking Folders

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**

Tracking ◄◄

- ☐ 🗀 **My Trackin**
  - 🗀 01 Con
  - 🗀 02 Pres
  - 🗀 03 UR
  - 🗀 04 UR
  - 🗀 05 OO
  - 🗀 06 Foc
  - 🗀 07 eCo
  - 🗀 08 eComm Communications
  - 🗀 09 eComm SET
  - 🗀 10 Testing
  - 🗀 Salesforce Mass Sends
  - 🗀 Salesforce Single Sends
  - 🗀 Test Send Emails
  - 🗀 Triggered Sends
  - ☐ 🗀 Journey Builder Sends

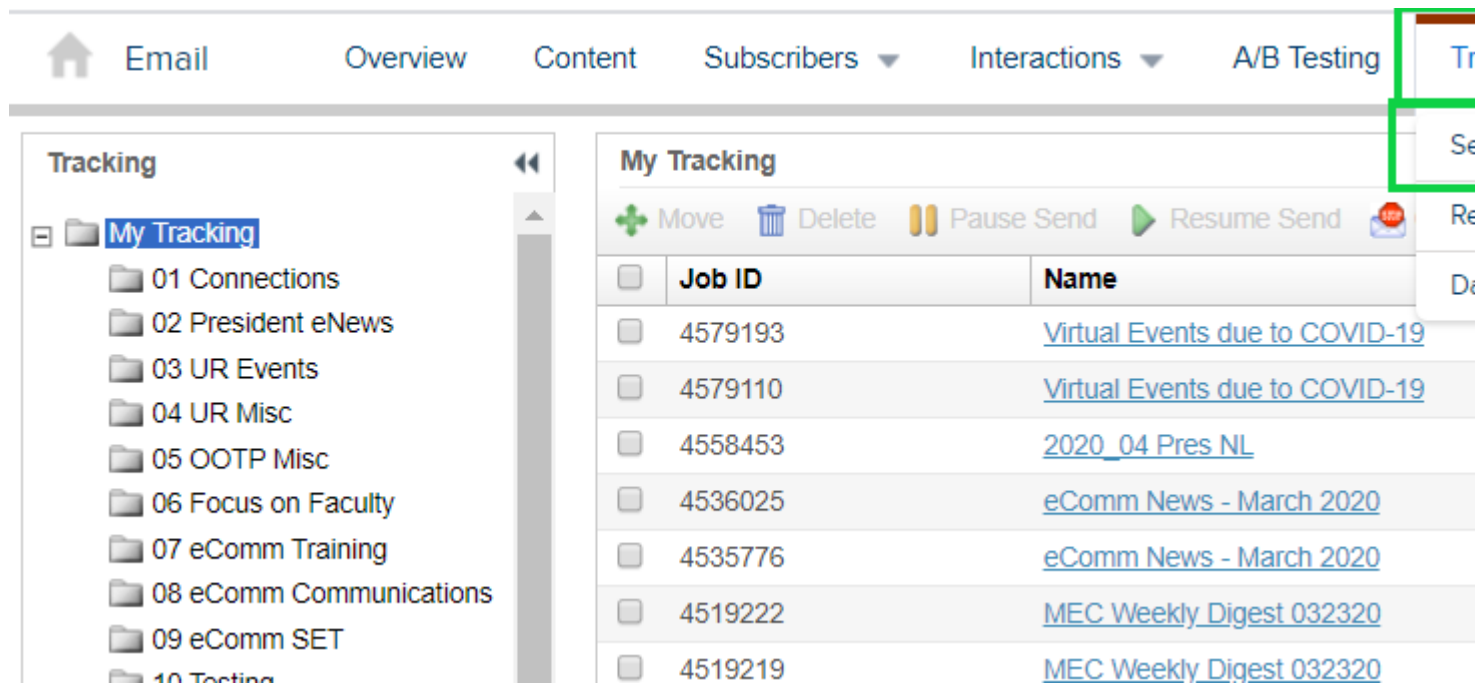| Open |
| --- |
| Move |
| Delete |
| Rename |
| **New Folder** |
| Properties |

My Tracking

Move   🗑 Delete   ⏸ Pause Send   ▶ Resume Send   ✉ Canc

	Job ID	Name
	4579193	Virtual Events due to COVID-19
	4579110	Virtual Events due to COVID-19
	4558453	2020_04 Pres NL
	4536025	eComm News - March 2020
	4535776	eComm News - March 2020
☐	4519222	MEC Weekly Digest 032320
☐	4519219	MEC Weekly Digest 032320
☐	4519216	MEC Weekly Digest 032320
☐	4516035	20200319_Training Invite
☐	4509809	UCCS Cvent Flex Training Invitation
☐	4509804	MEC Weekly Digest 031620

Tracking ◄◄

- ☐ 🗀 **My Tracking**
  - 🗀 01 Connections
  - 🗀 02 President eNews
  - 🗀 03 UR Events
  - 🗀 04 UR Misc
  - 🗀 05 OOTP Misc
  - 🗀 06 Focus on Faculty
  - 🗀 07 eComm Training
  - 🗀 08 eComm Communications
  - 🗀 09 eComm SET
  - 🗀 10 Testing
  - 🗀 Salesforce Mass Sends
  - 🗀 Salesforce Single Sends
  - 🗀 Test Send Emails
  - 🗀 Triggered Sends
  - ⊞ 🗀 Journey Builder Sends
  - 🗀 A/B Testing
  - 🗀 **new treenode**
- ⊞ • My Reports
- • My Data

My Trackin

✚ Move

☐	**Job ID**
☐	457919
☐	457911
☐	455845
☐	453602
☐	453577
☐	451922
☐	451921
☐	451921
☐	451603
☐	450980
☐	450980
☐	449946
☐	449945
☐	449944
☐	449943
☐	449940

- **Name the folder**
    - Folders will automatically order alphabetically

Place Emails in Tracking Folders

- Moving Forward
- Retroactively

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

✉✓ Define Properties   ✓ Select Audience   🕐 Configure Delivery   ☰ Review and Se

Send Timing

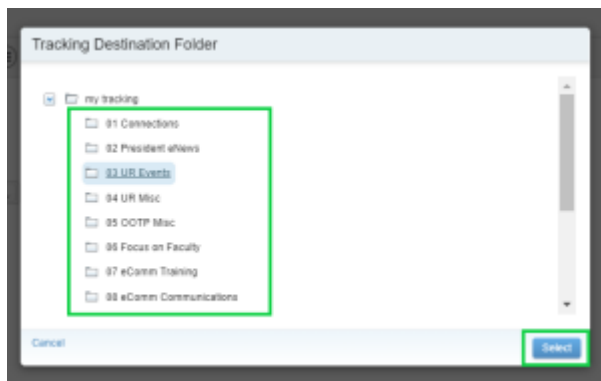🔘 Send Immediately

⭕ Schedule

| Select Date 📅 | at | Select Time ▾ |

(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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