

## Organizing Your Work for Ongoing Automation Studio Sends <sup>[1]</sup>



November 4, 2019 by [jennifer.mortensen](#) <sup>[2]</sup>

If you're hoping to use Automation Studio on a regular basis to streamline your recurring sends, you're on the right track. Automation Studio can help you save a significant amount of time and work, particularly for the sends that occur on a weekly or monthly (or other cadence) basis. For this example, we'll be looking at how the Office of the President organized work for the weekly send of CU Connections.

**PRE-REQUISITES** This wiki assumes that you've already read [Scheduling Data Extension Imports in Automation Studio](#) <sup>[3]</sup> and [Scheduling Salesforce Send Emails in Automation Studio](#) <sup>[4]</sup>. If you haven't yet reviewed those wikis, please do so before proceeding.

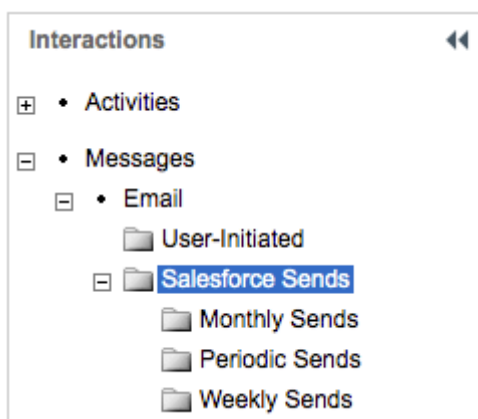
### **Salesforce Send Emails**

If you're used to scheduling Salesforce Send emails, your Marketing Cloud Salesforce Send Email screen might look something like the example below: one Salesforce Email Send with a unique name for each send.

Salesforce Sends				
<span>★ Create</span> <span>🗑️ Delete</span> <span>📁 View Active Sends</span> <span>➕ Move</span> <span>✉️ Send</span> <span>📧 Test Send</span>				
<input type="checkbox"/>	Name	External Key	Description	Created
<input type="checkbox"/>	<a href="#">2019_10 Prez nl - Internal</a>	66875	2019_10 Prez nl - Internal	10/3/2019
<input type="checkbox"/>	<a href="#">2019_10-03 CU Connections Email</a>	66759	2019_10-03 CU Connections Email	10/2/2019
<input type="checkbox"/>	<a href="#">USC - Ralphies Corral 2019</a>	66641	USC - Ralphies Corral 2019	10/2/2019
<input type="checkbox"/>	<a href="#">2019_10-02 Focus on Faculty</a>	66585		10/2/2019
<input type="checkbox"/>	<a href="#">20191001 Strategic Plan Announcement</a>	66490		10/1/2019
<input type="checkbox"/>	<a href="#">MEC Weekly Digest 092719</a>	65841		9/27/2019
<input type="checkbox"/>	<a href="#">eComm News - September 2019</a>	65628		9/26/2019
<input type="checkbox"/>	<a href="#">2019_09-26 CU Connections Email</a>	65473	2019_09-26 CU Connections Email	9/25/2019
<input type="checkbox"/>	<a href="#">2019_10-03 System Dashboards Invite 2</a>	65472		9/25/2019
<input type="checkbox"/>	<a href="#">Reminder Arizona - Ralphies Corral 2019</a>	65161	Reminder Arizona - Ralphies Corral 2019	9/24/2019
<input type="checkbox"/>	<a href="#">2019_09-23 System Dashboards Invite 1</a>	64931		9/23/2019
<input type="checkbox"/>	<a href="#">MEC Weekly Digest 092019</a>	64519	MEC Weekly Digest 092019	9/20/2019
<input type="checkbox"/>	<a href="#">2019_09-19 CU Connections Email</a>	64217	2019_09-19 CU Connections Email	9/18/2019

While this process does work, it's more complicated than it needs to be for sends that occur on an ongoing basis. For example, on the list above, you'll notice that CU Connections appears three times, each with a different date.

1. **Instead of creating a separate list item for each email, you can create subfolders beneath the Salesforce Send Email parent folder.** Just right click on the Salesforce Send Email folder in the left navigation pane, and then select New Folder 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 a new Salesforce send in the desired folder.** For example, we created two weekly sends: one communication for CU's eComm Specialists, and other for CU Connections.

Salesforce Sends > Weekly Sends

Create Delete View Active Sends Move Send Test Send

<input type="checkbox"/>	Name	External Key	Description	Created	M
<input type="checkbox"/>	<a href="#">Weekly Send - CU Connections</a>	69912	Weekly Send - CU Connections	10/21/2019 1:53 PM	11
<input type="checkbox"/>	<a href="#">Weekly Send - MEC Weekly Digest</a>	69876	Weekly Send - MEC Weekly Digest	10/21/2019 12:06 PM	11

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. When you're done, save your work.

**3. When you're ready to complete a weekly send to the audience you created, modify your Salesforce Send Email so that it points to the correct content.** 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."

Salesforce Sends > Weekly Sends

Create Delete View Active Sends Move Send Test Send

**✓ The Salesforce Send has been saved**

<input type="checkbox"/>	Name	External Key	Description	Created
<input type="checkbox"/>	<a href="#">Weekly Send - CU Connections 103119</a>	69912	Weekly Send - CU Connections	10/21/2019 1:53 PM
<input type="checkbox"/>	<a href="#">Weekly Send - MEC Weekly Digest</a>	69876	Weekly Send - MEC Weekly Digest	10/21/2019 12:06 PM

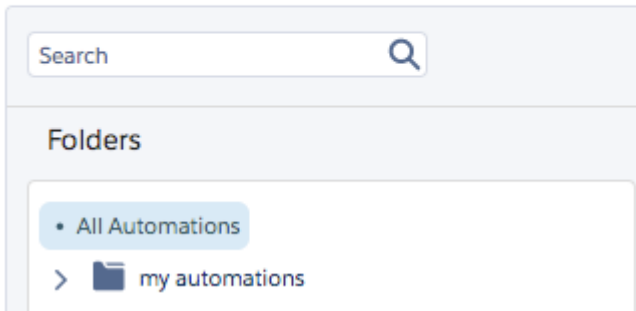
**REMINDER** If you make ANY changes to your email content after saving your Salesforce Send Email, you'll need to re-select your content in the send configuration to ensure that the changes are captured.

## Automation Studio Sends

Similar to how we organized our work in folders in Salesforce Send Emails, you can also organize your ongoing sends in Automation Studio. If you haven't yet created a folder structure in Automation Studio, the folders you will see are All Automations and my automations.

## Overview

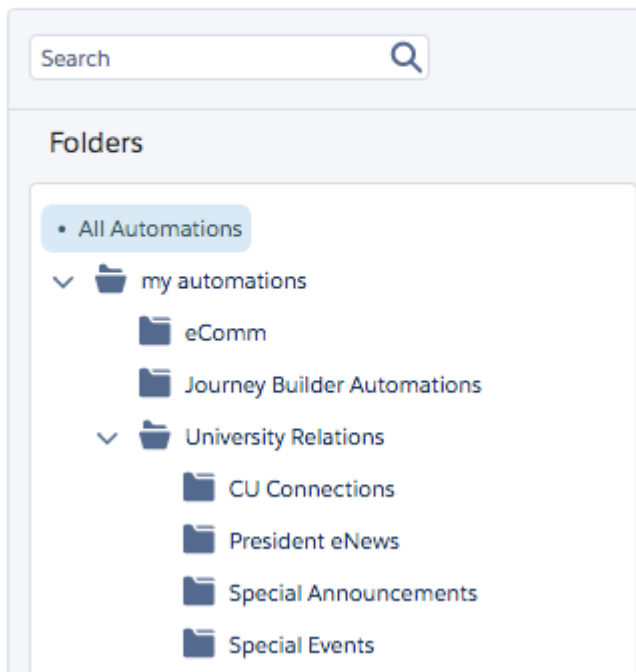
25 Automations









1. To create your own folder structure, **right click on my automations to create a new subfolders or subfolders**. In this case, we've labeled the folders so that they correspond with the category of send.

## Overview

25 Automations



2. Within each folder, **configure an automation that contains your audience, any exclusions (if applicable), desired wait time (if applicable), and a placeholder Salesforce Send Email that you'll link to your previously created Salesforce Send Email** when you're ready to schedule and send.

STARTING SOURCE	Step 1	Step 2
<p><b>SCHEDULE</b></p>  <p> <input type="button" value="Edit"/></p> <p>Active <input type="button" value="✓ Paused"/></p> <p>REPEAT: Once</p> <p>STARTING: 11/04/2019 6:00 AM</p> <p>TIME ZONE: (GMT-07:00) Mountain Time (US &amp; Canada) *</p> <p>The schedule is suspended and must be activated for scheduled runs to resume.</p> <p><input type="button" value="Skip Next Occurrence"/></p>	<p>ANNOTATIONS Faculty and Staff</p> <div data-bbox="593 383 1067 618"> <p>1.1 Import File <input type="button" value="▼"/></p>  08 UREL OG SYS Emp SUB Connections         </div> <div data-bbox="593 667 1067 902"> <p>1.2 Import File <input type="button" value="▼"/></p>  08 UREL OG AMC Emp SUB Connections         </div> <div data-bbox="593 952 1067 1187"> <p>1.3 Import File <input type="button" value="▼"/></p>  08 UREL OG DUAL Emp SUB Connection         </div>	<p>Wait</p> <div data-bbox="1176 383 1596 600"> <p>2.1 Wait <input type="button" value="▼"/></p>  5 Minutes         </div>

## Linking Salesforce Send Email to Automation Studio Content

1. When you're ready to complete your email send, **ensure that you have selected the correct and most up-to-date content** in your Salesforce Email Send configuration.

Salesforce Sends > Weekly Sends > **Weekly Send - CU Connections 103119**

Save Delete Cancel

**Properties**

**Name (required)**  
Weekly Send - CU Connections 103119

**External Key**  
69912

**Description**  
Weekly Send - CU Connections

**Message (required)**

Classic Emails Content Builder Emails

- + 10
- + 17
- + 24
- 31
  - 2019\_10-31 CU Connections Email
- + email files
- + eComm
- + eComm Training

**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.

2. In Automation Studio, return to your weekly send and select the Salesforce Send Email you desire from the list of options that appears.







### 3.1 Salesforce Email Send



- GuidedSend\_70870be5-885d-4769-ae41-
- 2019\_halloween cu sys Reminder
- Special Announcement - Students, Faculty, and
- Special Announcement - Students
- Special Announcement - Faculty & Staff
- Monthly Send - eComm Newsletter Oct. 2019
- Monthly Send - Kennedy eNews (External)
- Monthly Send - Kennedy eNews (Internal)
- ✓ Weekly Send - CU Connections 103119
- Weekly Send - MEC Weekly Digest
- MEC Weekly Digest 102119
- Stanford - Ralphies Corral 2019 REMINDER
- 2019\_10-17 CU Connections Email
- USC - Ralphies Corral 2019 Reminder

Cancel

Done

STARTING SOURCE	Step 1	Step 2
<p><b>SCHEDULE</b></p>  <p> <input type="button" value="Edit"/></p> <p><input type="button" value="Active"/> <input checked="" type="button" value="Paused"/></p> <p>REPEAT: Once</p> <p>STARTING: 11/04/2019 6:00 AM</p> <p>TIME ZONE: (GMT-07:00) Mountain Time (US &amp; Canada) *</p> <p>The schedule is suspended and must be activated for scheduled runs to resume.</p> <p><input type="button" value="Skip Next Occurrence"/></p>	<p>ANNOTATIONS Faculty and Staff</p> <div data-bbox="590 380 1061 616"> <p>1.1 Import File <input type="button" value="v"/></p>  08 UREL OG SYS Emp SUB Connections         </div> <div data-bbox="590 660 1061 896"> <p>1.2 Import File <input type="button" value="v"/></p>  08 UREL OG AMC Emp SUB Connections         </div> <div data-bbox="590 952 1061 1187"> <p>1.3 Import File <input type="button" value="v"/></p>  08 UREL OG DUAL Emp SUB Connection         </div>	<p>Wait</p> <div data-bbox="1173 380 1596 593"> <p>2.1 Wait <input type="button" value="v"/></p>  5 Minutes         </div>

3. **Complete scheduling your automation** using the instructions in [Scheduling Salesforce Send Emails in Automation Studio](#) [4].

## Related Content

- [How do I schedule a Salesforce Send Email in Automation Studio?](#) [5]
- [How do I schedule Data Extension imports in Automation Studio?](#) [6]

[automation studio](#) [7], [salesforce send emails](#) [8]

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