<u>Home</u> > Folders in Marketing Cloud

Folders in Marketing Cloud [1]

October 20, 2023 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

Ħ	Email	Overview	Content	Subscribers 👻	Interactions 👻	A/B Testi
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Content Builder Use Classic Content

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🗸 늘 Content Builder			NAME	
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> 📔 Office of the President				

- 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.

	Create a Local Folder	×
1	Enter a name Regents	
41	Cancel	Create

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

٩	Search							
	5632 Content Items CU System University Relations							
		NAME	LOCATION					
	MEC Weekly Dignst MI-10 MI-1	MEC Weekly Digest 041122 MEC Weekly Digest April 11, 2022	Digest					
•		08_OIT_4.7.22_training-invitation You're Invited to CU at the Zoo!	Content Builder					
	and the second sec	OIT_footer_test	New User Training					
		2022_04-08 CU Connections Email CU Connections, April 8 issue, is here	08					

- 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

Search	
5632 Content Items CU System University Relations	
NAME	LOCATION
MEC Weekly Digest 041122 MEC Weekly Digest 041122 MEC Weekly Digest April 11, 2022	Digest
08_OIT_4.7.22_training-invitation You're Invited to CU at the Zoo!	Content Builder
OIT_footer_test	New User Training
2022_04-08 CU Connections Email CU Connections, April 8 issue, is here	08

Salesforce Send Folders

There's two ways to send emails through Marketing Cloud. <u>Guided Send (with a step-by-step wizard)</u> [3] and <u>Salesforce Send Emails</u> [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.

Sal	esforce Sends								
-	🖕 Create 🛅 Delete 🖹 View Active Sends 🛛 💠 Move 🛛 📩 Send 🔂 Test Send								
	Name	External Key	Description	Crea					
	2019_10 Prez nl - Internal	66875	2019_10 Prez nl - Internal	10/3/					
	2019_10-03 CU Connections Email	66759	2019_10-03 CU Connections Email	10/2/					
	USC - Ralphies Corral 2019	66641	USC - Ralphies Corral 2019	10/2					
	2019_10-02 Focus on Faculty	66585		10/2					
	20191001 Strategic Plan Announcement	66490		10/1/					
	MEC Weekly Digest 092719	65841		9/27/					
	eComm News - September 2019	65628		9/26					
	2019_09-26 CU Connections Email	65473	2019_09-26 CU Connections Email	9/25/					
	2019_10-03 System Dashboards Invite 2	65472		9/25					
	Reminder Arizona - Ralphies Corral 2019	65161	Reminder Arizona - Ralphies Corral 2019	9/24/					
	2019_09-23 System Dashboards Invite 1	64931		9/23/					
	MEC Weekly Digest 092019	64519	MEC Weekly Digest 092019	9/20/					
	2019_09-19 CU Connections Email	64217	2019_09-19 CU Connections Email	9/18/					

- 1. Create subfolders under the Salesforce Send Email parent folder.
 - From Email Studio hover Interactions then click Salesforce Send Email in the dropdown

1	Email	Overview	Content	Subscribers 👻	Interactions 👻	A/B	Testir	ng	Tr
(Overview				Import Data Extract				
	Recent Items				File Transfer				
				Content Builder Emails	Filter		tfolio	Lists	
	📴 Urwasity of Colorado	Audit Reminder - 20200422 ACTION REQUIRED BY APRIL 27: Reminder to complete e		Query		DIFIED ON doesday, April 22			
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	The United State S				Report		DIFIED anie Jo	BY mes	
			Data Factory Utility						
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	eComm New User Training						PV		
				Triggered Emails		anie Jones			
	Carlos de C								

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• 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.

		tent Subscriber	s v Interactions v	A/B Te
Interactions		Salesforce Sends		
Advites		🤹 Create 🍵 De	inte 📋 View Active Send	s 🔶 Move
Data Extract		Name		Extern
 Report 		GuidedSend	539a5628-7dbc-47e1-81e2	-3 10803-
 File Transfer 		20200413 Tra	nsition to New eComm Hel	p 10723
Import		2020 04-22	skillSoft Audit Reminder	10693
Ca Scripts		2020 04-13	lex Optional Items	10596
Ca Filter		GuidedSend	3c05c089-ea8e-4195-a656	-8. 10541
 Data Factory Utility 		GuidedSent	5135318 ab65.4135.5621	3 10323
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User-Initiated		ULU Charter	or Announcement	10200
Salesforce Sends	Open		Jaire Testing	10284
Triggered Sends	Move	2_	b52a2333-cd89-48d8-921b	LQ 10180
E La Journey Builder 8	Delete	2_	bb0863b7-d61e-48bd-abe2	L 10180
	Rename	2	904fab0f-0e65-46dd-bd12-	10 10180
	New Folder		91a26aaf-af0a-4406-8e5e-	2 10119
		_	9a8d6b7-8f38-4c27-8c45-	<u>10059</u>
	Properties	2	9e85da64-bc7a-4998-80ce	5 10059
Interaction	IS			44
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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.

Sal	Salesforce Sends > Weekly Sends									
📩 Create 🛅 Delete 📋 View Active Sends 💠 Move 📩 Send 🔂 Test Send										
	Name	External Key	Description	Created	M					
\Box	Weekly Send - CU Connections	69912	Weekly Send - CU Connections	10/21/2019 1:53 PM	11					
	Weekly Send - MEC Weekly Digest	69876	Weekly Send - MEC Weekly Digest	10/21/2019 12:06 PM	11					

- 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.

Sal	Salesforce Sends > Weekly Sends							
*	🙀 Create 🛅 Delete 📋 View Active Sends 💠 Move 📩 Send 🔂 Test Send							
Ø	✓ The Salesforce Send has been saved							
	Name	External Key	Description	Created				
	Weekly Send - CU Connections 103119	69912	Weekly Send - CU Connections	10/21/2019 1:53 PM				
	Weekly Send - MEC Weekly Digest	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.

Data Extension Folder

Caution! Moving data extensions can have unintended consequences. Please validate your actions with the IOS Digital Engagement Administrator prior to your move.

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

👚 Email	Overview	Content	Subscribers 👻	Interactions	•	A/B Testing	Tr
Overview			All Subscribers				
Recent Items			Data Extensions				
			Salesforce Data Exte	ensions	emplate	es Portfolio	Lis
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A Latin - opport of a prior test of the sector of the sect		Shared Salesforce E Audiences	Data Extensions		MODIFIED BY Melanie Jones		
		Data Relationships Shared Publication I	Lists	MODIFIED Tuesday, A PM MODIFIED		N ril 21, 20 Y	
			Data Filters	Data Filters		Melanie Jones	
E Caracteria d'Adressione E Caracteria d'Adresione E Caracteria d'Adresione E Caracteria d'Adressio	SkillSoft Audit WITH Dynamic ACTION REQUIRED: Complete Exp		Measures pired Skillsoft Courses by April 27th		MODIFIED ON Tuesday, Apri PM MODIFIED BY Melanie Jone		:1, 20

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

👚 Email	Overview	Cont	ent	Subscribers 💌	Interactions	•	A/B Testing	Tr
Tracking		44	Му	Tracking				Se
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🚞 01 Conne	ections			Job ID	Name			De
D2 Presio	dent eNews			4579193	Virtual	Events	due to COVID-1	19
03 UR E	vents			4579110	Virtual	Events	due to COVID-1	19
	ISC 2 Mice			4558453	2020 (04 Pres	s NL	
05 00 F	s on Faculty			4536025	eComr	n News	s - March 2020	
07 eCom	nm Training			4535776	eComr	n News	s - March 2020	
🚞 08 eCom	m Communications			4510222	MECIV	Vookly	Digest 032320	
🚞 09 eCom	IM SET		0	4013222	MEC V		Digest 032320	
🖿 10 Tectin				4519219	MEC V	veekly	Digest 032320	

- Right click on the My Tracking folder displayed in the panel on the left
- Select New Folder



👚 Email

Subscribers 🐨

Interactions 🐨

tions 👻 🛛 A/B Testing

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Tracking	•	•	My	/ Tracking			
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				4519219		MEC Weekly Digest 032	2320
		h l		4519216		MEC Weekly Digest 032	2320
				4516035		20200319_Training Invit	te
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				4509804		MEC Weekly Digest 031	1620

My Trackin Tracking 44 💠 Move 😑 🚞 My Tracking Job ID 01 Connections 02 President eNews 457919 03 UR Events 45791' 04 UR Misc 45584 05 OOTP Misc 45360 06 Focus on Faculty 07 eComm Training 45357 08 eComm Communications 45192 09 eComm SET 45192 10 Testing 45192⁻ Salesforce Mass Sends Salesforce Single Sends 451603 Test Send Emails 450980 Triggered Sends 450980 🛄 Journey Builder Sends 44994 A/D Testing new treenode 44994 449944 449943 My Data 44994(

Overview

Content

Sub

• 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 Throttling

Tracking Destination Folder
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Of Connections S2 President el/keys Of UR Events Of UR Roc Of UR Noc Of S COTP Noc Of S Focus on Faculty S2 40 Annue Tabilitien
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Of UR Misc Of DOTP Misc Of Focus on Faculty So document Texture
B S DOTP Mac B Focus on Faculty S A down Tables
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Pri d2 eComp Taxining
Le of control of the second se
🗇 08 «Comm Communications 🗸
Cincel Select

• Choose the desired folder and click Select

Salesforce Send Email

• Choose the Tracking Destination Folder by scrolling to the bottom of your Salesforce Send.

ħ	Email	Overview	Content	Subscribers 👻	Interactions 👻	A/B Testing T
Inter	Activities • Data Extract • Report • File Transfer • Import • Query • Scripts • Filter • Data Factory	Utility	Content	Subscribers Iesforce Sends > 2020_ Save Delete Send Management Send Classification (re CU eComm (TRANSAC Override Sender Override Delivery	04-22_SkillSoft Audi Cancel equired) CTIONAL) Profile with CU eCon y Profile with CU eCon	AVB Testing
- •	Messages Email User-Initia Salesforce Triggered Journey B 	ated e Sends Sends Builder Sends		Use <u>Throttle</u> The e Send Logging Enable send logging Recipients <u>dit Recipients</u> Fargeted: Salesforce Data I Excluded: De-Duplicate by Email	email will be throttled at to a data extension Extensions : OG Skill Address: Yes	t the rate specified belo
				Message Properties User Tracking Track all links found Suppress this Send f Send Salesforce Tra Cracking Destination My Tracking O1 Connectio My Tracking O2 President O3 UR Events O3 UR Events O4 UR Misc	within this email. from Reports. cking Data ns eNews s	

- From Email Studio >> Tracking >> Sends
 Check the box next to the passed Email Sends that you wish to move

• Select Move

The Email Overview	Content	Subscribers 🔻	Interactions A/B Testing T
Tracking	44 M	y Tracking	Pause Send 🔊 Resume Send 🚙 Cano
My Tracking 101 Connections		Job ID	Name
02 President eNews 03 UR Events		4579193	Virtual Events due to COVID-19
04 UR Misc		4579110 4558453	Virtual Events due to COVID-19 2020.04 Pres NI
05 OOTP Misc 06 Focus on Faculty		4536025	eComm News - March 2020
D7 eComm Training		4535776	eComm News - March 2020
08 eComm Communications		4519222	MEC Weekly Digest 032320
10 Testina		4519219	MEC Weekly Digest 032320

- In the pop-up, select the folder you wish to move the Email Sends to.
 Select the move button

Му	Tracking		
÷	Move 👕 Delete	📔 Pause Send 🌓 Resume Send 🧶 Cancel Send 👧 Compare Ema	ail Sends Showin
	Job ID	Name	Date/Time
	4579193	Virtual Events due to COVID-19	4/16/2020
	4579110	Move Jobs	4/16/2020
1	4558453		4/6/2020 1
•	4536025	My Tracking	3/27/2020
	4535776	O2 President eNews	3/27/2020
	4519222	O3 UR Events	3/20/2020
	4519219	O4 UR Misc	3/20/2020
	4519216		3/20/2020
	4516035	Ob Focus on Faculty Of a Comm Training	3/19/2020
	4509809	O8 eComm Communications	3/17/2020

move Cancel

3/12/2020

3/12/2020

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.

Cvent - ST Errors

Display Title: Folders in Marketing Cloud **Send email when Published:** No

4499464

4499454

Source URL:https://www.cu.edu/blog/integrated-online-services/folders-marketing-cloud

Links

[1] https://www.cu.edu/blog/integrated-online-services/folders-marketing-cloud

[2] https://www.cu.edu/blog/integrated-online-services/author/39[3] https://youtu.be/oBrU_K1-VsI?t=2151

[4] https://www.cu.edu/blog/ecomm-wiki/send-marketing-cloud-emails