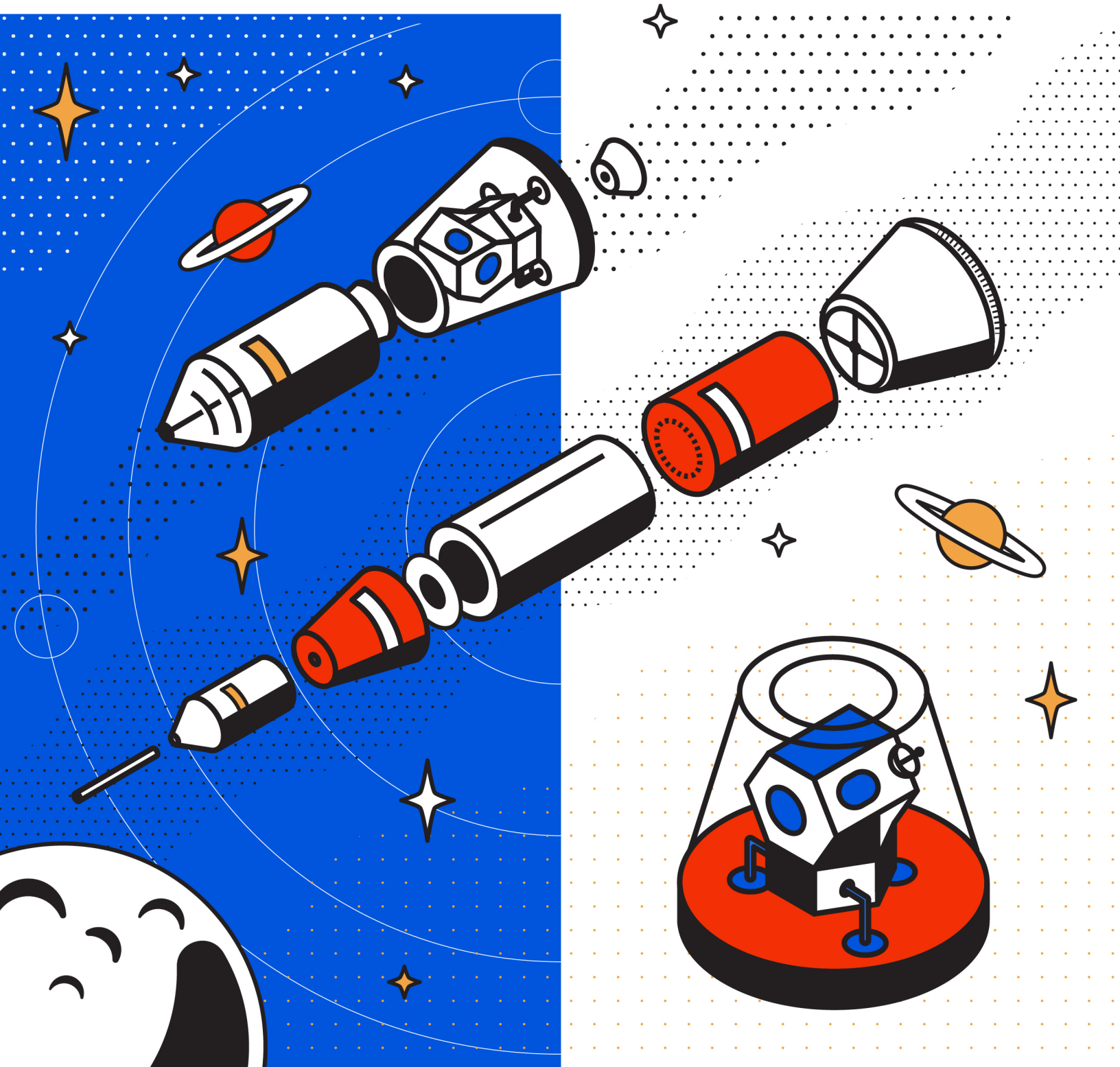
CoSchedule

Maximize Value and Efficiency

with CoSchedule Integrations

4



In this lesson:

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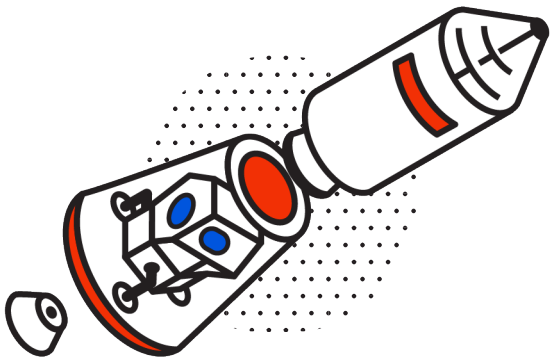
Adding a Google Drive Integration

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Adding Social Profiles to CoSchedule

Social Sync



Integration Checklist

Before we get started, use this checklist as you start to set up integrations in your CoSchedule account. It follows the content in this lesson to help you set-up everything from social profiles to Google Drive and everything in between.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Add a WordPress account.**	Toggle down your name in the left-hand corner; click integrations; find WordPress on the list; and follow the prompts.	
2	☐	**Connect a Google Drive.**	Toggle down your name in the left-hand corner; click integrations; find Google Drive on the list; and follow the prompts.	
3	☐	**Sync your email marketing.**	Toggle down your name in the left-hand corner; click integrations; find MailChimp, Constant Contact or Campaign Monitor on the list; and follow the prompts.	
4	☐	**Add your social profiles.**	Toggle down your name in the left-hand corner; click social profiles; follow the prompts.	

Introduction

Adding integrations to your CoSchedule account helps maximize the value you receive from your entire marketing tool stack.

Integrations make CoSchedule the single source of truth for all marketing activities. It means you can continue using the best tools to create and deliver your messaging, while gaining visibility into how everything interconnects and works together.

What is this guide? This lesson covers how to set up integrations to get more value out of CoSchedule.

Who's this guide for? New CoSchedule power users that will be implementing CoSchedule for their marketing team.

What you'll learn:

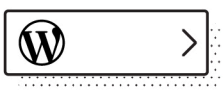
- How to set up WordPress.
- How to add Google Drive.
- What calendar sync is.
- How to integrate your email marketing.
- How to add social profiles.
- What value social sync provides.

Integrating a WordPress Account

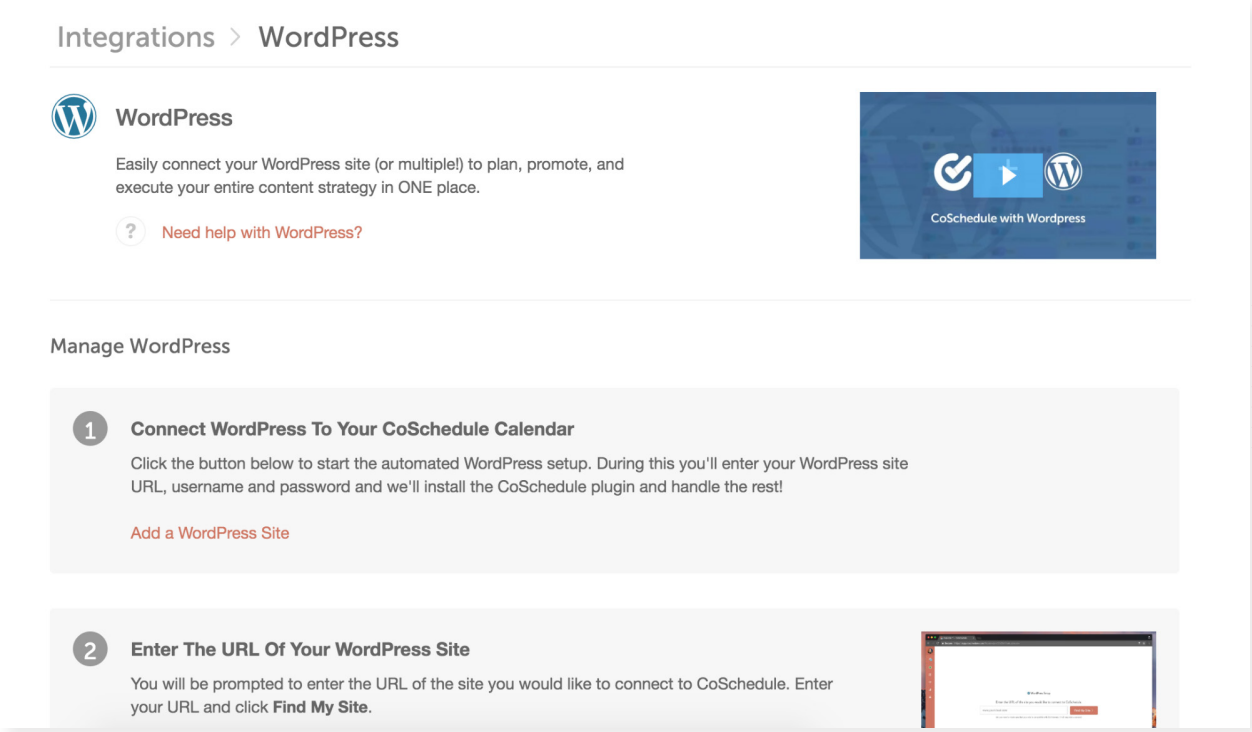
CoSchedule's WordPress integration helps you stay on top of marketing activities that are happening outside of CoSchedule.

Whenever someone creates a new post in WordPress, it will automatically appear on your CoSchedule calendar so you can see when all blog posts are going live.

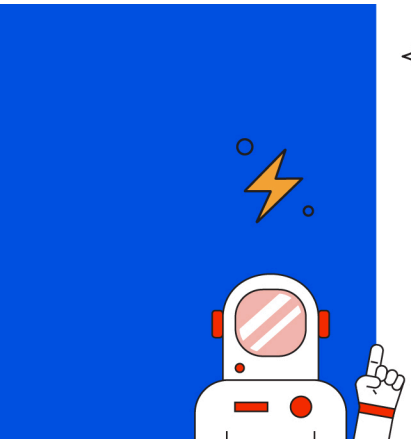
To connect a WordPress account:

1	☐	**Toggle down your name.** 
2	☐	**Navigate to 'Integrations' in the drop down menu.** 
3	☐	**Click the blue button, 'Add More Integrations'.** 
4	☐	**Scroll down to find WordPress from the list of options.** 

Follow the prompts until you reach this screen:



Next, follow the step-by-step directions listed to finish your WordPress set-up.



TIP

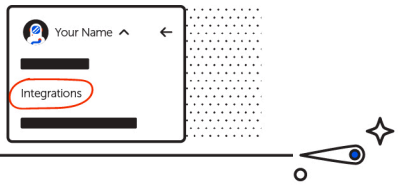
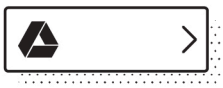
You might need approval from your IT department before getting this integration set up. Here's a help doc section that can provide your IT department more info if necessary.

Adding a Google Drive Integration

The next integration we recommend adding is Google Drive. This allows you to attach Google files to any CoSchedule project so everything is in one place.

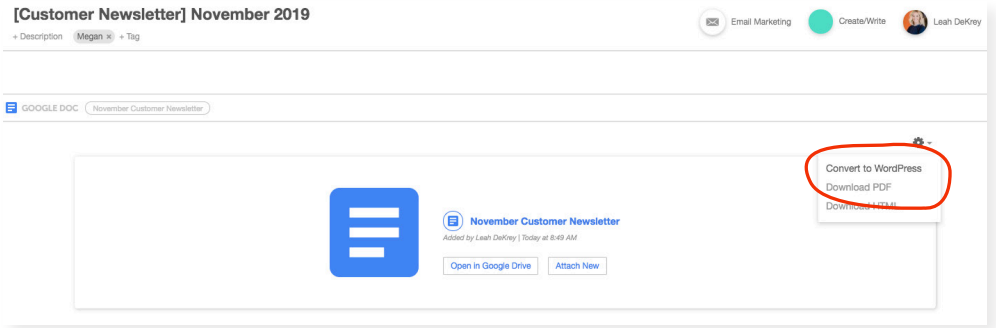
Attaching Google Drive files to projects makes it easy for people to see all the work that has been done without needing a meeting to get them up to speed.

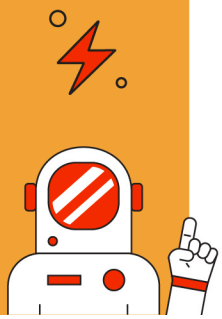
To connect Google Drive:

1	☐	**Toggle down your name.**	
2	☐	**Navigate to 'Integrations' in the drop down menu.**	
3	☐	**Click the blue button, 'Add More Integrations'.**	
4	☐	**Scroll down to find Google Drive from the list of options.**	

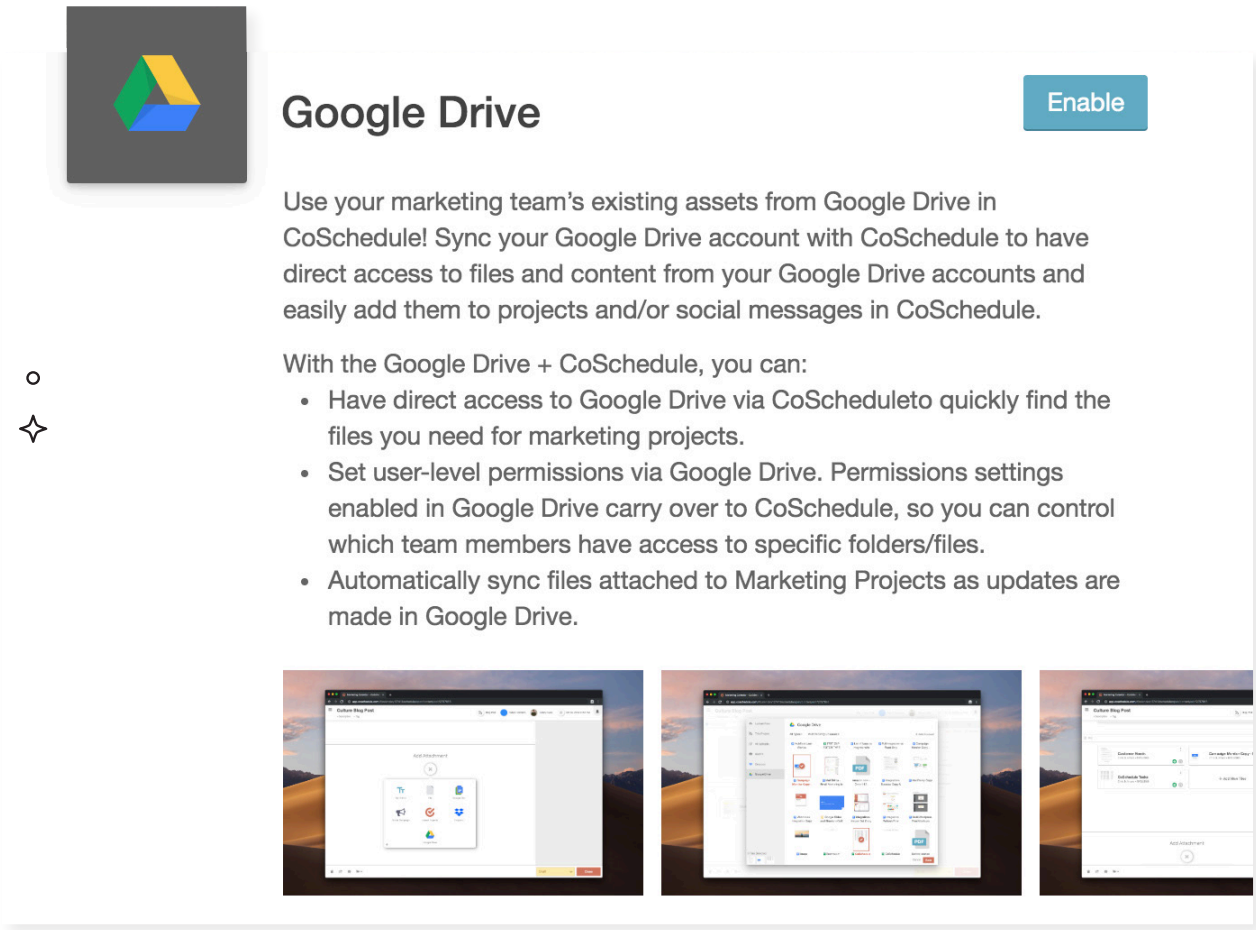


Your writers can produce all their content in a Google Doc, attach it to a project, and convert it into a WordPress post with the click of a button.

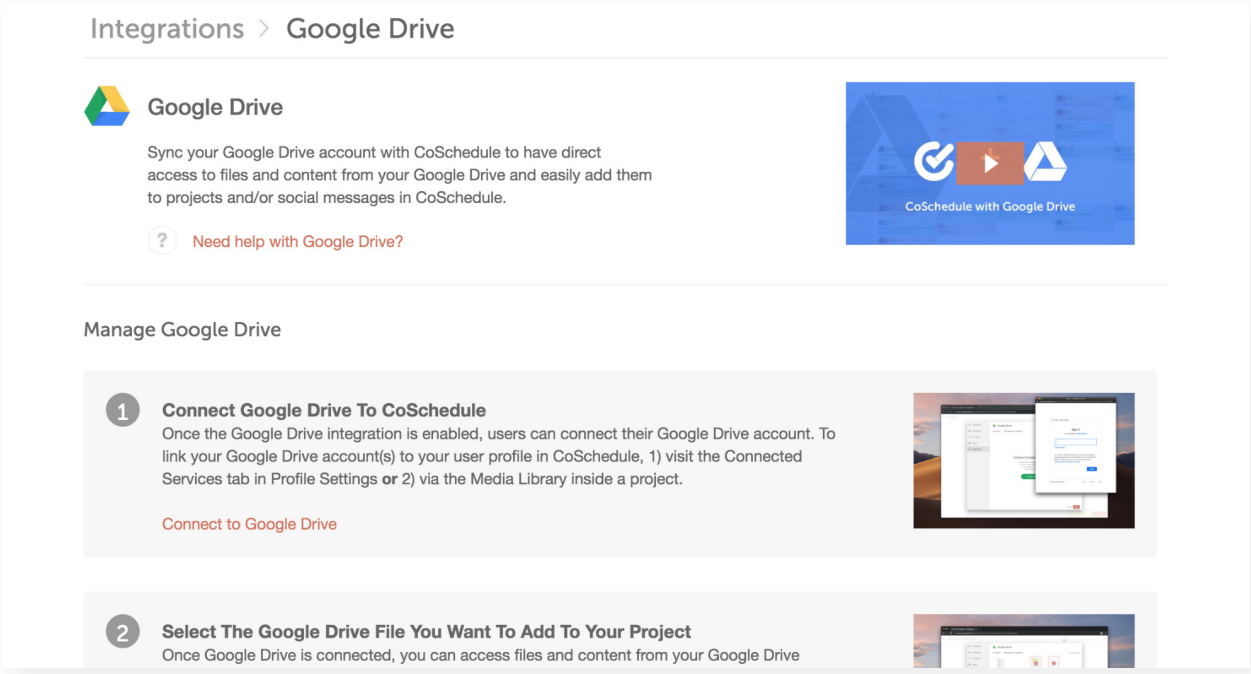




Follow the prompts to set up the integration.



When you reach this screen, follow the step-by-step directions listed to finish your Google Drive set-up.

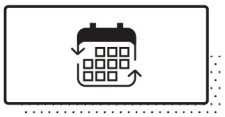


Calendar Sync

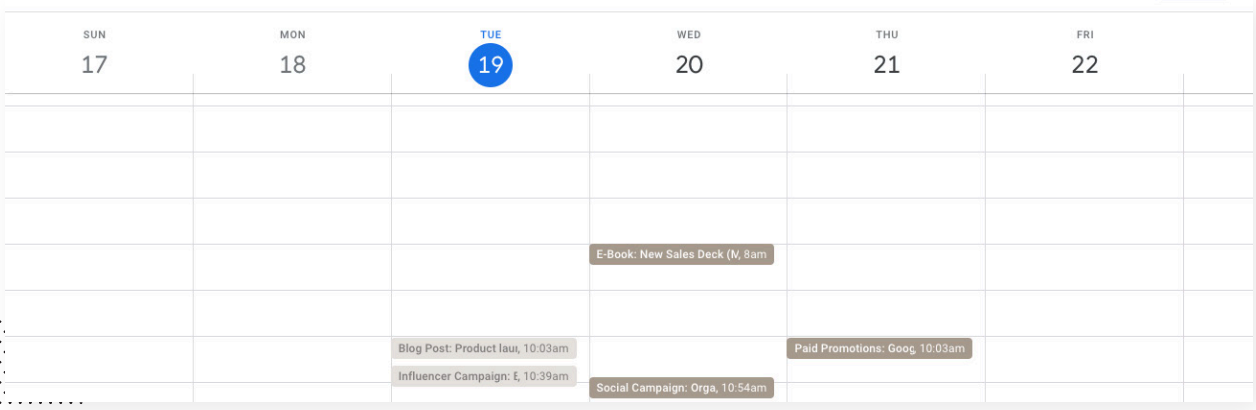
Keep important projects top-of-mind and stakeholders in-the-know.

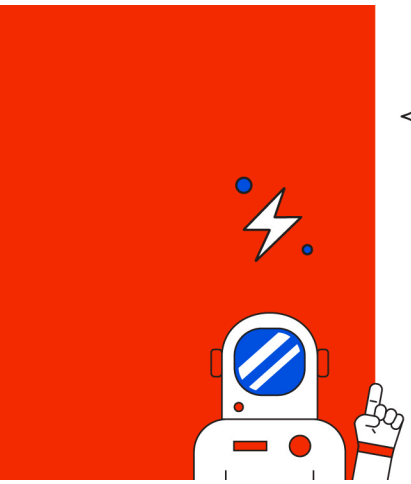
With calendar sync you can add read-only projects and/or social messages from CoSchedule to a Google Calendar, Outlook Calendar, Apple Calendar, or other calendar app. This makes all your CoSchedule activities available to stakeholders so they can stay updated on what your team is working on.

To set up calendar sync:

1	☐	**Toggle down your name.** 
2	☐	**Navigate to 'Integrations' in the drop down menu.** 
3	☐	**Click the blue button, 'Add More Integrations'.** 
4	☐	**Scroll down to find calendar sync from the list of options.** 
5	☐	**Follow the steps to connect CoSchedule's calendar sync to your preferred calendar.** 

Here's what calendar sync looks like on a Google Calendar once you've set it up.





TIP

You cannot create or control projects from your external calendar; that must be done in CoSchedule. However, you can see when your projects will publish.

Connecting an Email Marketing Account

Visibility when it comes to email marketing is vital. You don't want to send too many emails to the same list or you risk increasing your unsubscribes.

Integrating your email marketing platform with CoSchedule makes it simple to see all the emails that are going out so you can manage your email strategy at a glance and keep everyone on the same page.

There are a few email marketing platforms that CoSchedule integrates with, including:

- MailChimp
- Campaign Monitor
- Constant Contact

Campaign Monitor and Constant Contact allow CoSchedule to pull in all of your scheduled email campaigns, which then appear on your calendar as projects. If you want to make changes to an email, you'll have to do so directly in the email platform.

If you're using MailChimp to send your email marketing, CoSchedule's integration allows you to view all email marketing campaigns on your calendar and make real-time changes to your emails without jumping into MailChimp.

To set up an email marketing integration:

1	☐	**Toggle down your name.** 
2	☐	**Navigate to 'Integrations' in the drop down menu.** 
3	☐	**Click the blue button, 'Add More Integrations'.** 
4	☐	**Scroll down to find your email client from the list of options.** 

Adding Social Profiles to CoSchedule

Social media is an important element for your marketing, so why not do it all in one tool?

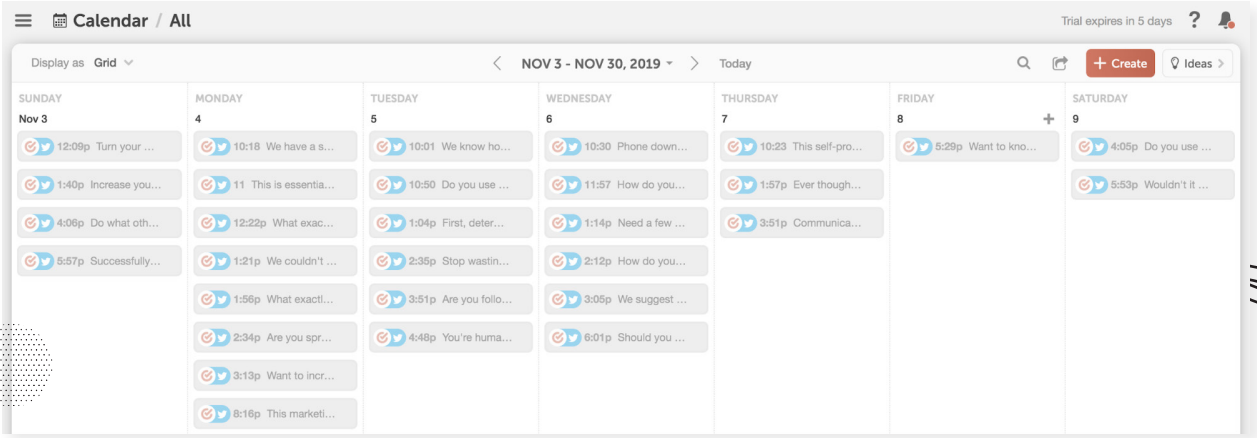
Connecting social profiles to CoSchedule brings your social team into the same platform as the rest of your marketing team, so you can easily plan, schedule, monitor, and report on ALL your marketing activities... including social.

Here's how to connect a social profile to your CoSchedule calendar:

1	☐	**Toggle down your name.** 
2	☐	**Find the list item called 'Social Profiles'.** 
3	☐	**Click the blue 'Connect a Social Profile' button in the corner.** 
4	☐	**Choose the social profile you want to connect and follow the prompts.**

Social Sync

Once you've added a new social profile to your calendar, CoSchedule will bring in historic social messages and analytics for that profile.

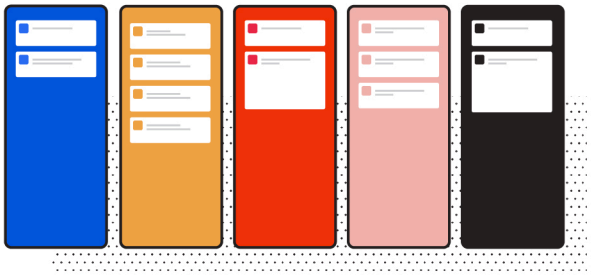


If you want to continue using a different social media scheduling tool, adding social profiles to your CoSchedule account means that CoSchedule will continuously sync new messages onto your calendar that were posted natively or via other scheduling tools so your social reports are always accurate.

This means that you get all the benefits of CoSchedule's amazing visibility and reporting features – even if you decide to schedule messages outside of CoSchedule.

Head over to your calendar to start adding integrations.

ADD YOUR INTEGRATIONS



OR



Ready to learn more?

Check out the next lesson for details about how to get CoSchedule ready for your team.

HEAD TO LESSON 5