Make Yourself at Home:

Navigating The CoSchedule Calendar



In this lesson:

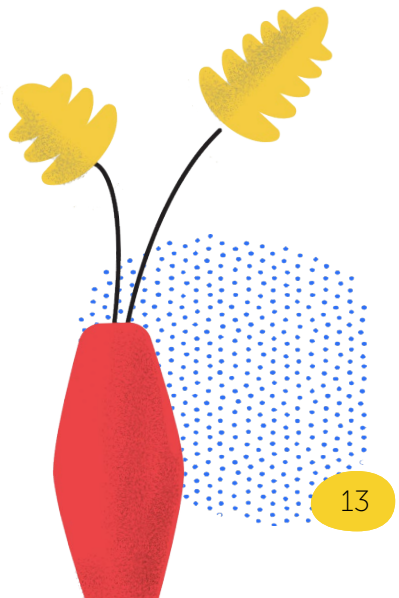
Navigating Your Calendar Checklist

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The Home Dashboard

Customizing Your Notification Preferences



Navigating Your Calendar Checklist

Before we get started, use this Navigating Your CoSchedule Calendar Checklist to follow along step-by-step. It will help guide through the process of getting acquainted with your CoSchedule calendar.

Step	Completed	Action Item	Instructions
	✓	*Complete all steps on your CoSchedule Calendar.*	
1		Add a task from your home dashboard.	From the home dashboard, click the orange + New Task button and add a task. 
2		Create a read-only link.	Click the share icon in the corner of your calendar and create a link. Copy and paste the link into a new browser tab to see how it works. 
3		Favorite a project.	From the calendar, click the three dots in the corner of the project and add it to your favorites. 
4		Customize your notifications.	Toggle down your name in the left-hand corner and choose notification preferences. 

Introduction

What is this guide? This guide will walk you through the different areas of CoSchedule to help you feel comfortable navigating the tool.

Who's this guide for?: New CoSchedule users that are on a marketing team.

What you'll learn:

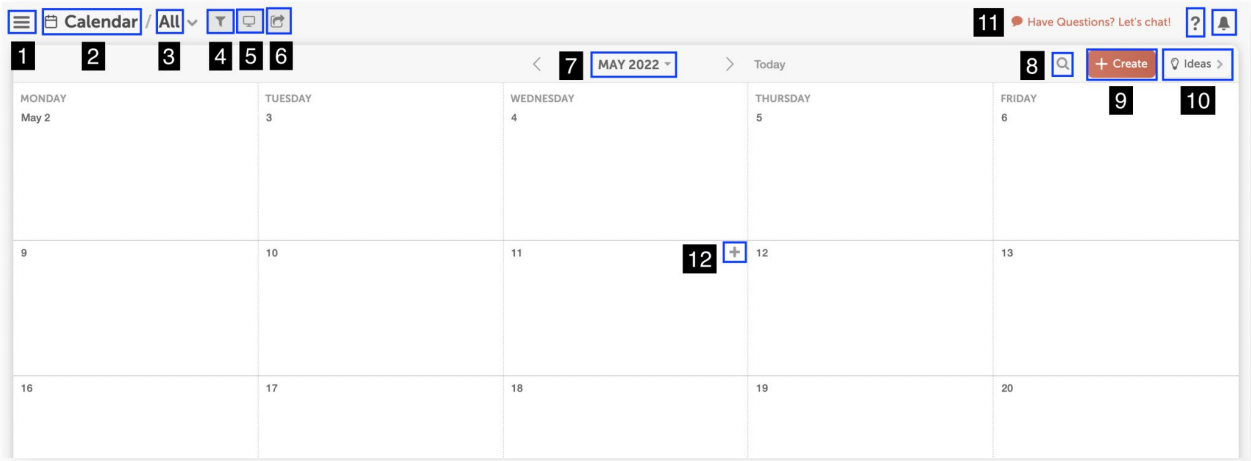
- How to navigate your calendar.
- How to use your home dashboard.
- How to customize your notification preferences.

Why you should read this guide?: This guide will teach you how to quickly navigate CoSchedule, so you feel comfortable getting your work done in the tool.

The Calendar View

CoSchedule is the only marketing software that allows you to see everything you have scheduled in a calendar view.

Let's explore its features to help you navigate your calendar.



1. **Hamburger menu:** This is where you will find your calendar settings, email preferences, and profile information.

2. **Breadcrumb navigation – tools:** Quickly navigate to different features of CoSchedule. Here you will find things like your analytics & reports, social media conversations, ReQueue, and the Kanban board.

3. **Breadcrumb navigation – saved views:** Choose specific saved views of your calendar to filter out the info you don't need.

4. **Filtering:** Organize your Saved Views your way using filters by adding & customizing your filter settings.

5. **Display settings:** Easily choose how far out you want to view your projects and declutter your calendar by hiding items you don't need to see.

6. **Read-only sharing:** Once you save your new view, you can create a read-only link and share your work with your team.

7. **Date navigation:** Choose specific months/years or navigate forward/backward through your calendar. For example, use this to easily see what you delivered last month.

8. **Search:** Find past or future marketing projects on your calendar using keywords. For example, if a recently published blog post needs an edit, search the title to find it.

9. **Create:** Add projects to your calendar like new blog posts, social media messages, and newsletters.

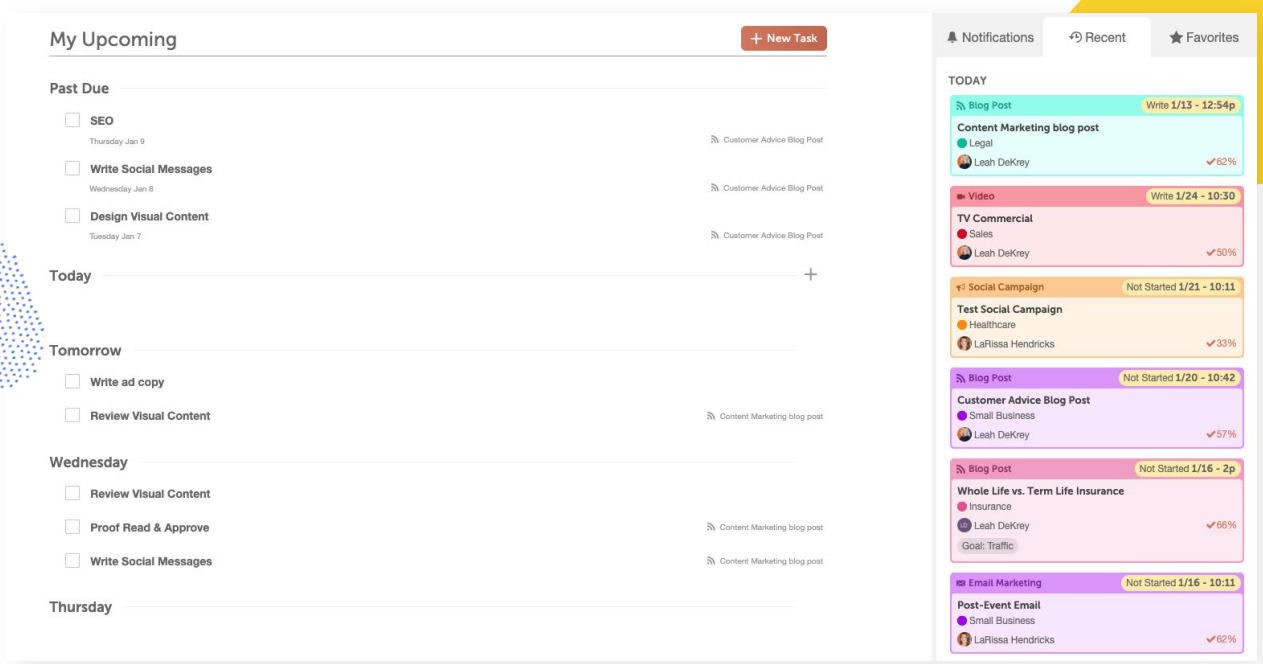
10. **Ideas:** The ideas bin is where all project ideas live. When the project is ready to be scheduled, it can be dragged to the calendar. Tip: Use this to see projects that will be coming down the pipeline.

11. **Support center & notifications:** Use the question mark icon to get best practice advice or message the CoSchedule support desk. Use the bell icon to see notifications, recent projects, and favorites.

12. **Create a project on a specific date:** Know the date you want to schedule a project? Add items to specific days using the plus sign on a date.

The Home Dashboard

The Home Dashboard in CoSchedule gives you a snapshot of all your tasks and helps you quickly find projects on your calendar.



1. **My upcoming list:** Find a list of all your daily priorities.

2. **Add task:** Quickly add a task to your to-do list. Tip: Add personal tasks to remind yourself about emails that need a response to or one-off items that cannot be forgotten.

3. **Notifications:** Find items that need your attention like new changes to your CoSchedule calendar or new discussions with team members.

4. **Recent:** A list of all the projects you've recently been working on. This makes it quick to jump in where you left off.

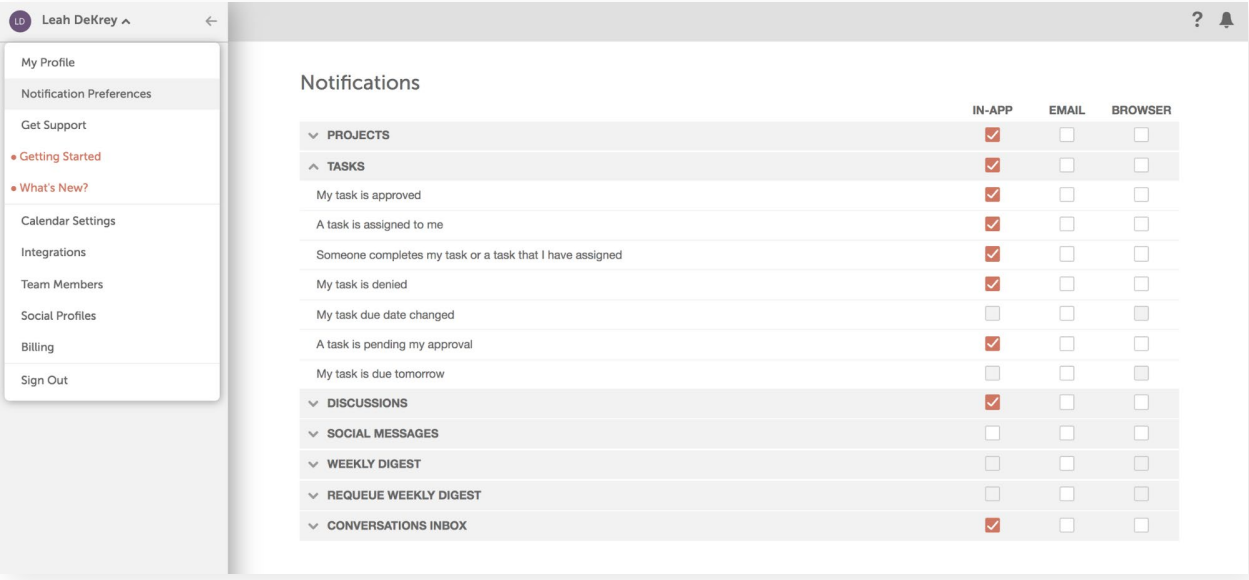
5. **Favorites:** A list of all the projects you've marked as your favorites. Tip: Have a recurring project that you need to quickly duplicate on a regular basis? Add it to your favorites to save time searching the calendar.

Customizing Your Notification Preferences

Notifications are a powerful way to stay up-to-date on relevant discussions and get notified when you're about to miss a deadline.

BUT, too many messages make it difficult to catch the most important things for your role.

CoSchedule lets you customize your notifications so you have the right info at the right time.



To set your notifications, toggle down your name in the top left-hand corner and choose notification preferences.

Click Around Your Own Calendar to Explore.

OPEN YOUR CALENDAR



OR

Ready to Start Getting Some Work Done?

Head to the Next Lesson to Learn How to Start Managing Your Work in CoSchedule.

NEXT LESSON

