Make Your CoSchedule Calendar Work For You:

Tips & Tricks to Execute Your Work Quickly



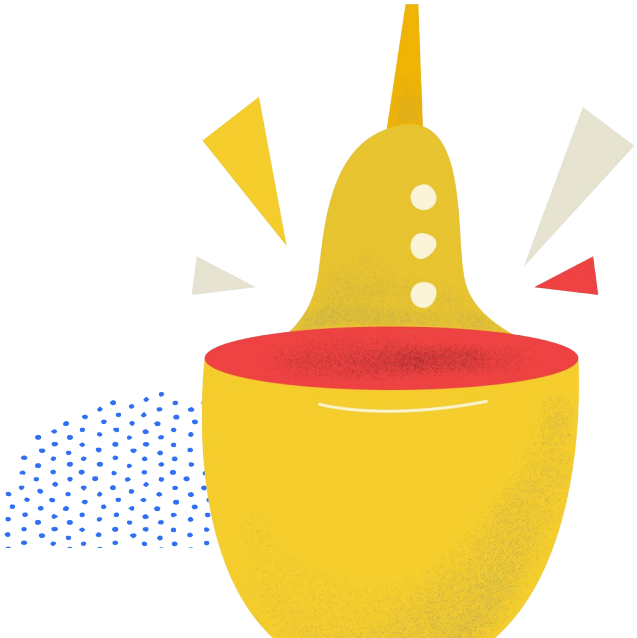
In this lesson:

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Marketing Campaigns in CoSchedule

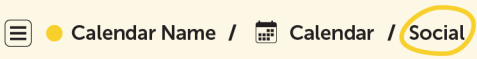
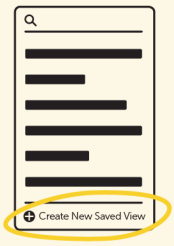
Saved Views in CoSchedule

Rescheduling in CoSchedule



Introduction

To start, use this checklist to discover the best way to make the CoSchedule calendar work for you. It will help you understand the value the marketing calendar provides and how to customize your experience.

Step	Completed	Action Item	Instructions
	✓	*Complete all steps on your CoSchedule Calendar.*	
1		Navigate to a saved view.	From the calendar, click the saved view option in the breadcrumb menu. Visit a different saved view on your calendar. 
2		Create your own saved view.	From the saved view drop down in the breadcrumb menu, choose create new saved view. Choose a team member filter and select yourself. 

What is this guide? Learn all about the CoSchedule Marketing Calendar and how to make it fit your everyday needs.

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

What you'll learn:

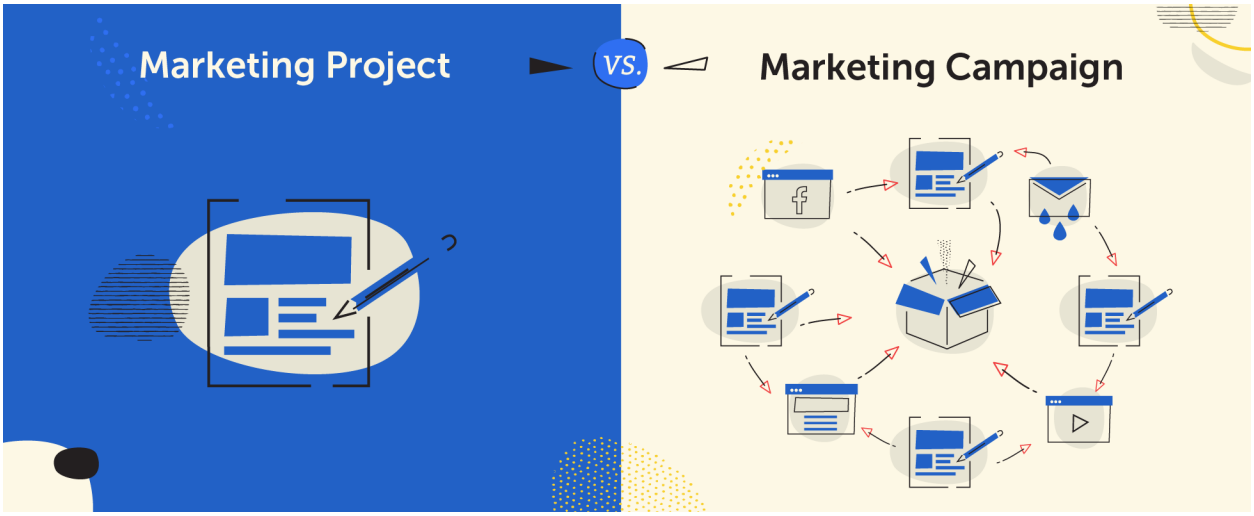
- How and when to use the Marketing Campaign activity.
- How to use and create custom saved views.
- How to drag and drop to reschedule.

Why you should read this guide?: This guide is a great place to start for new users looking to make better use out of their CoSchedule Marketing Calendars.

Marketing Campaigns in CoSchedule

In lesson three, you learned a little about marketing campaigns in CoSchedule. If you need a refresher, here's how a marketing campaign works in CoSchedule.

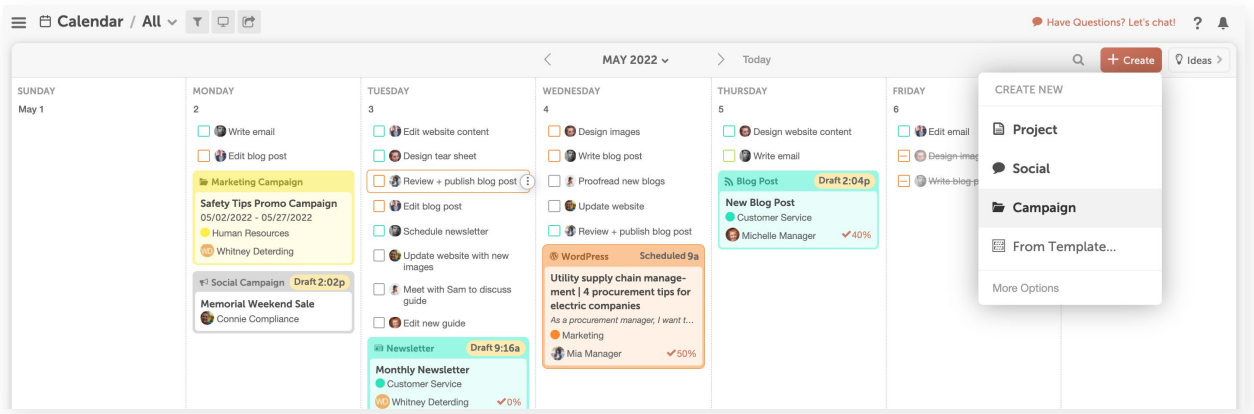
A marketing campaign is made up of a series of marketing projects. They usually have a start/end date and work together to promote a single initiative.



A good example of a marketing campaign is a new product launch. These campaigns usually contain a series of associated projects like emails, social ads, search ads, blog posts, social messages, maybe even commercials and print materials and run over an extended period of time.

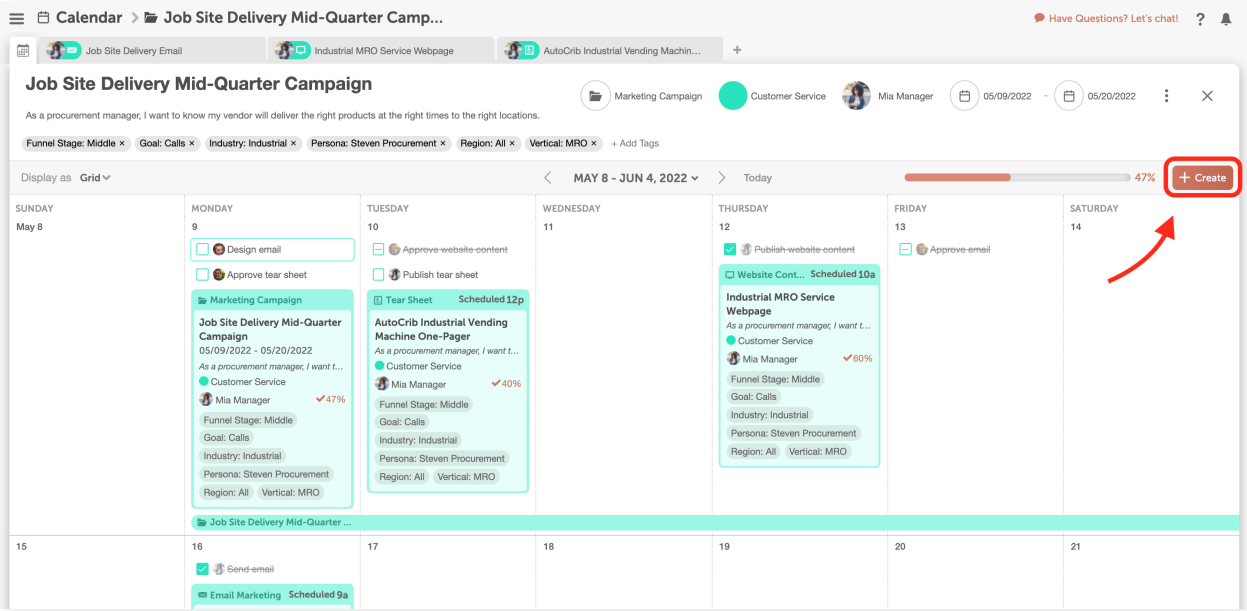
Planning a Marketing Campaign

To start planning a marketing campaign, click the plus sign on a date on your calendar. Then, navigate down to the option that says "Campaign".



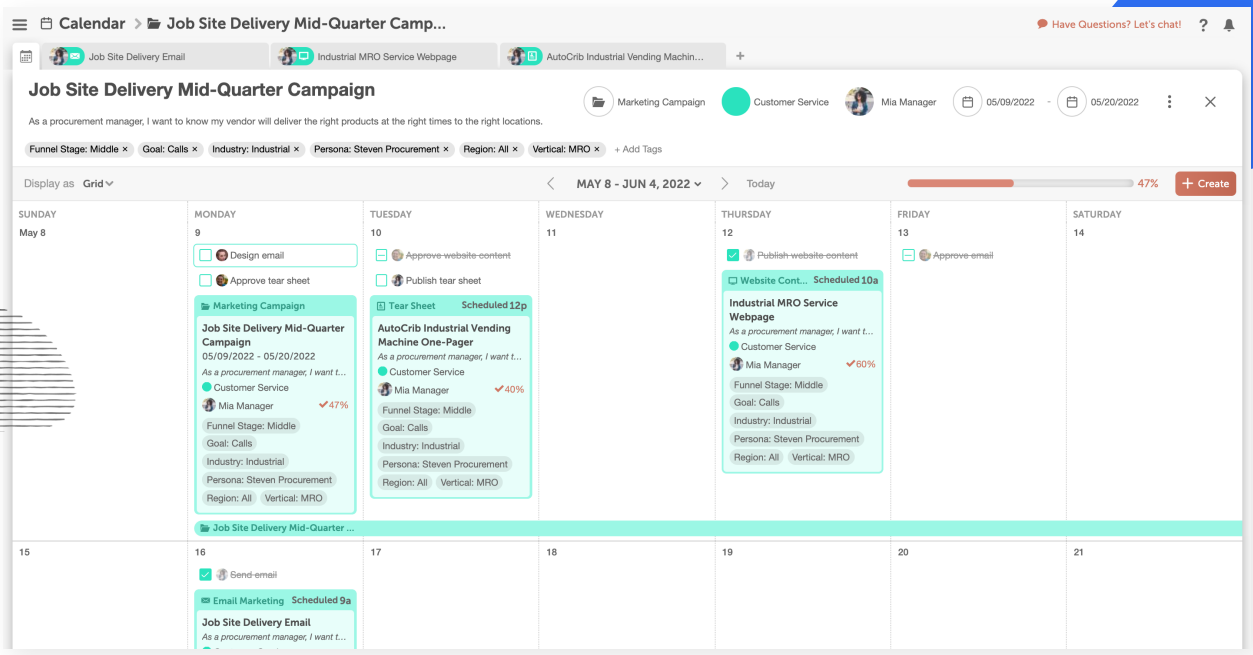
On the next screen, enter the name of your campaign add its start and end dates.

Each marketing campaign in CoSchedule will have its own calendar view. This helps visualize when each project will launch and offers a clutter-free, focused view of your marketing campaign.



From the marketing campaign calendar, click the plus sign on a date to continue adding projects to your campaign. You can also click the plus tab on the top to add a project.

Here's a look at what a marketing campaign might look like in CoSchedule. You'll see a bunch of marketing projects all working towards promoting the same initiative.

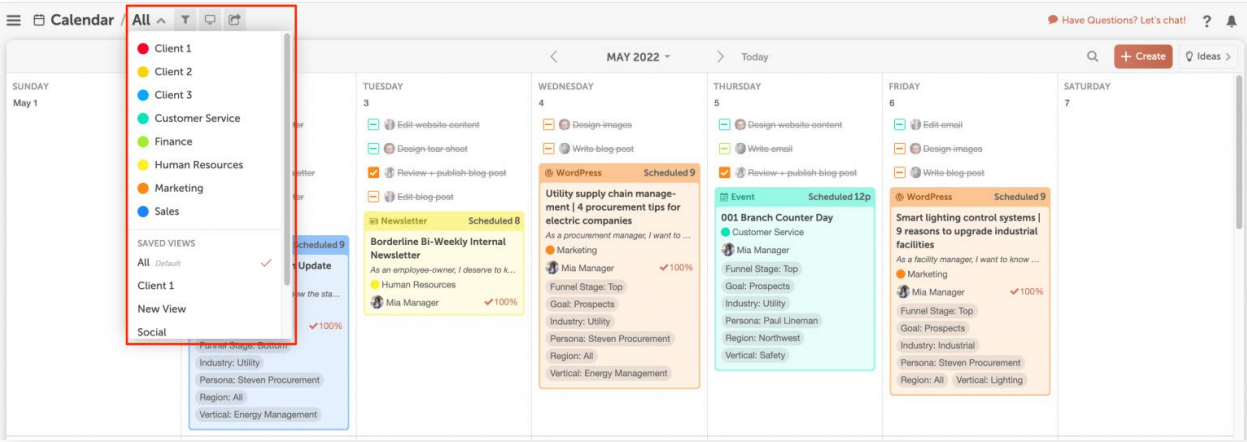


Saved Views in CoSchedule

A saved view offers a way to filter your calendar to only see certain projects. Some common saved views that you might have set up on your calendar include:

- Social messages
- Blog posts
- Individual departments
- Newsletters

To navigate to a saved view, click the saved view option in your main calendar navigation.



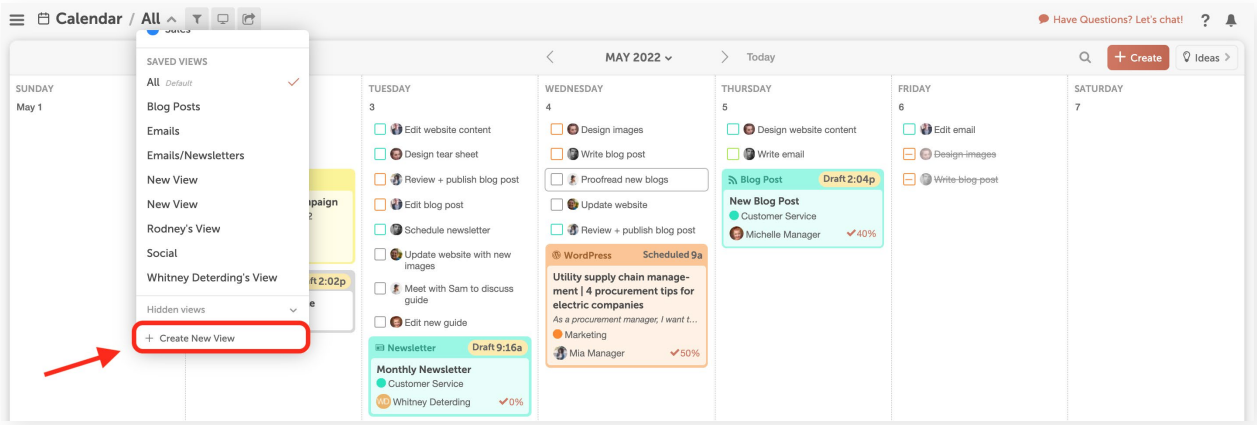
Create a Custom Saved View of All Your Projects

Creating a custom saved view of all your individual projects is one of the most valuable ways to use the feature. This allows you to filter out projects that you're not involved so you can focus your own priorities.

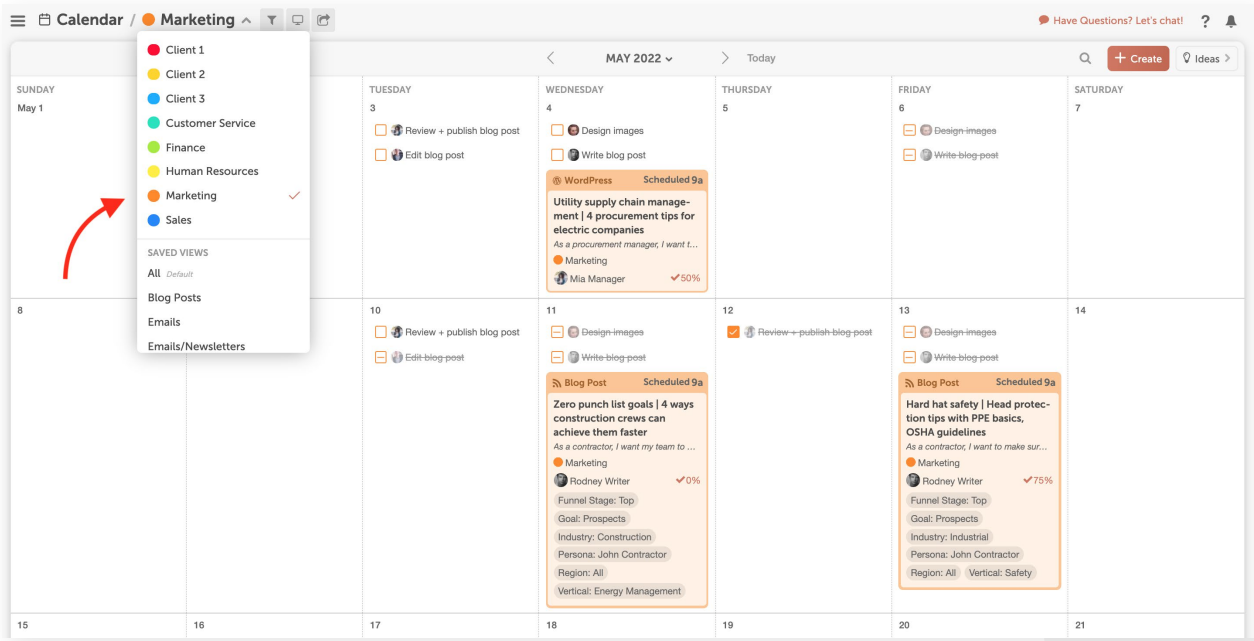
Here's how to do it:

To create a new Saved View, select **Create New View**. Give the new view a name and make selections to the Filter Content and/or Calendar Display Settings.

Whatever options you select will appear on your calendar immediately and whenever you are using this Saved View.



This will give you a filtered view of all your projects, tasks and campaigns. To find your saved view, click on it from the saved view breadcrumb menu.



Rescheduling in CoSchedule

One of the best features in CoSchedule is the ability to easily reschedule a project and all it's associated tasks, social messages, etc with the drag and drop functionality.

If a due date changes, it no longer takes a thousand clicks is several tools just to move a launch date.

All your have to do is drag and drop the project to a new date and everything will automatically reschedule. The best part? Everyone's tasks will also update in their CoSchedule accounts.

