

Follow this process if you have the Ideas Board in CoSchedule.

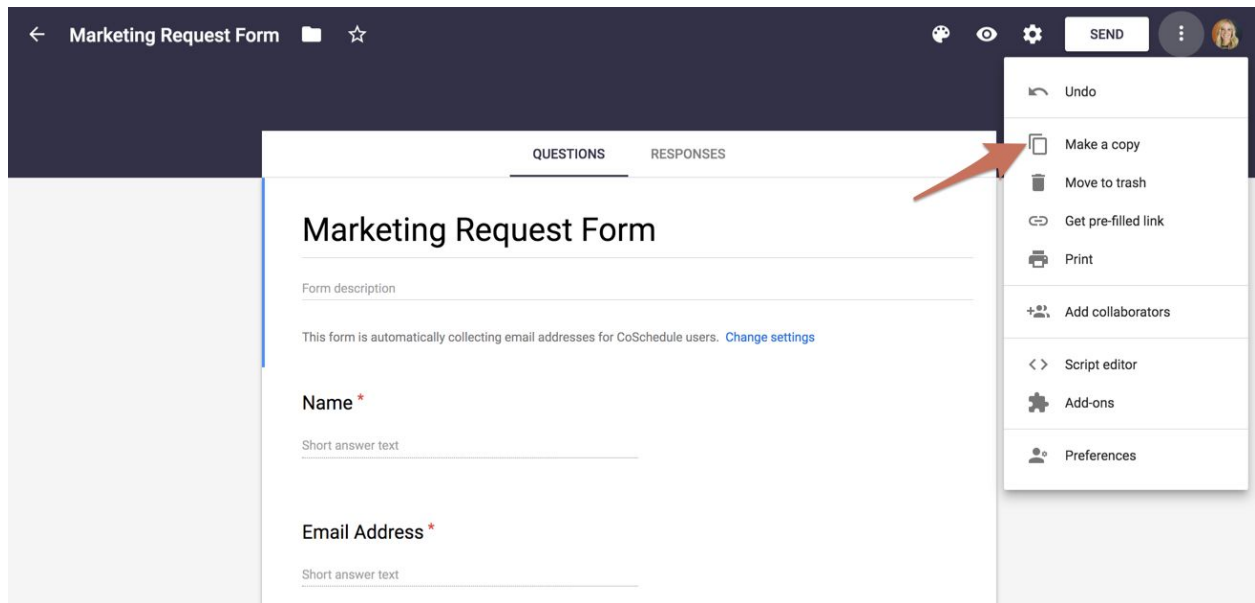
Step 1: Create a Marketing Request Form

The first thing you need to do is create a Google Form with all the details you need from the project requester.

This is what people in other departments will use to request projects from your team moving forward.

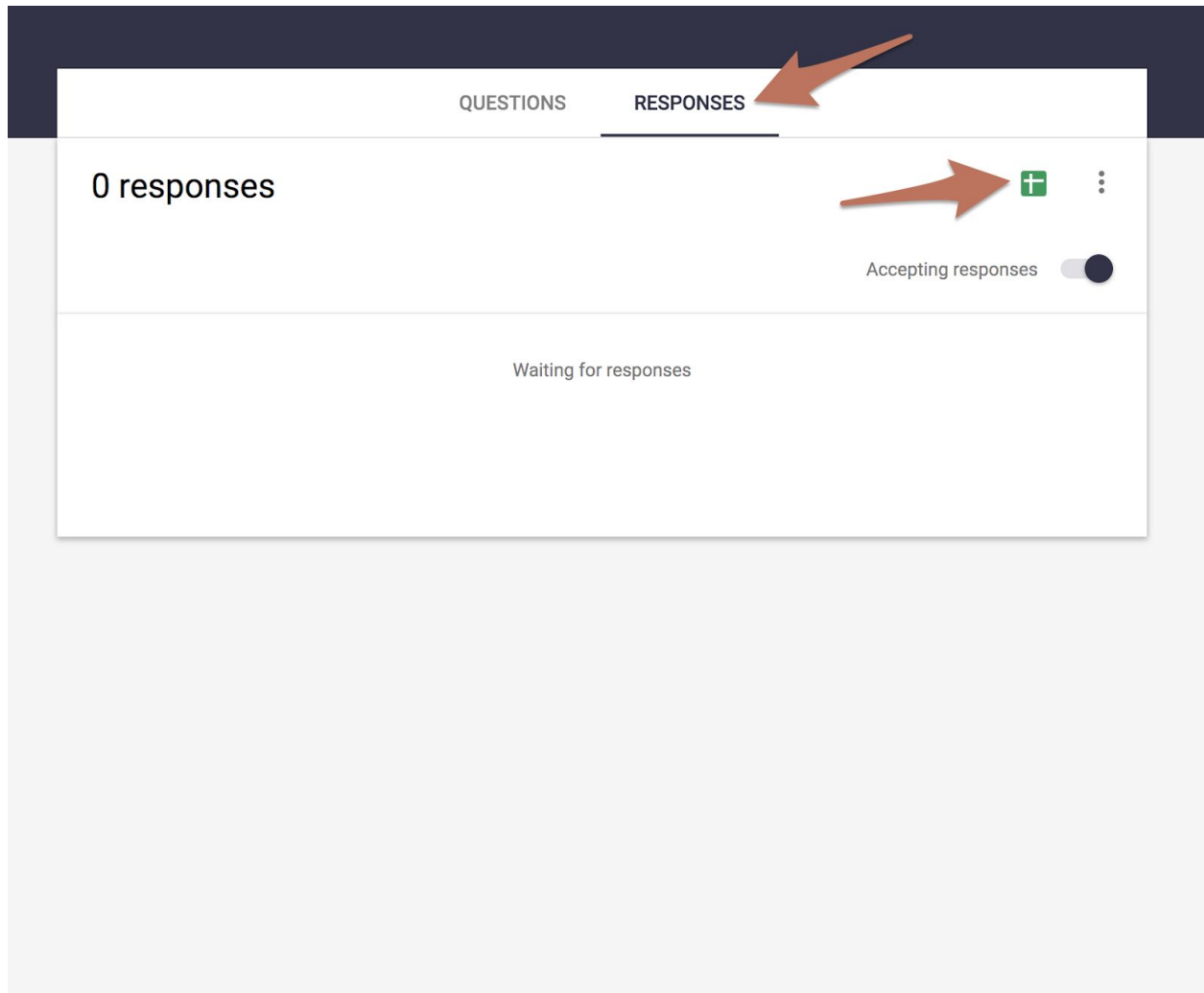
[Here's a Google Form template we've created for you.](#)

To use it, simply create a copy and save it to your Google Drive.



The screenshot shows a Google Forms interface for a form titled "Marketing Request Form". The form is in the "QUESTIONS" tab, and the "RESPONSES" tab is also visible. The form has a description: "This form is automatically collecting email addresses for CoSchedule users. [Change settings](#)". It contains two required short answer text questions: "Name *" and "Email Address *". A red arrow points to the "Make a copy" option in the top right menu, which is open and shows options like "Undo", "Make a copy", "Move to trash", "Get pre-filled link", "Print", "Add collaborators", "Script editor", "Add-ons", and "Preferences".

Next, you'll turn this form into a Google Sheet by clicking the responses tab and saving it as a new spreadsheet in your Google Drive.



Step 2: Create a Custom Status on Your Idea Board

Head over to your CoSchedule calendar and open up your calendar settings by toggling down your name in the top left-hand corner. Then choose "statuses" on the left-hand menu.

Create three custom statuses under the ideas section.

- Requested
- Backlog
- Up Next

Status Name	Status Type
Requested	Idea
Backlog	Idea
Up Next	Idea

Step 3: Connect Zapier

When your Google Form is created and you've added custom statuses, connect CoSchedule to the Google Form using Zapier.



Head over to the [integrations area of CoSchedule](#) and make sure you've added Zapier as an integration. Don't have a Zapier account? [Click here to create a free Zapier account](#).

Once you've got the Zapier integration added to your CoSchedule calendar, you'll need to create a Zap in Zapier.

In Zapier, choose to connect Google Forms with CoSchedule.


What Do You Want to Automate Today?

Connect this app...

 Google Forms 



with this one!

 CoSchedule 

When this happens...

Select a Trigger 



then do this!

Select an Action 

 It only takes a few minutes to save hours (or even days) of work

Make a Zap!

Then choose:

When this happens...

New Response in Spreadsheet

Then do this!

Create New Project



What Do You Want to Automate Today?

Connect this app...


 Google Forms 



with this one!

 CoSchedule 



When this happens...

New Response in Spreadsheet 



then do this!


Create Project 

  **Create project in CoSchedule when new response in spreadsheet in Google Forms**



Use Zap



Once you've clicked "Use Zap", Zapier will walk you through the process of setting it up. We'll go through it below to help.

Sign in to your Google account using the blue button.




When this happens ...
1. New Response in Spreadsheet in Google Forms





 Choose App & Event 

Choose Account




Sign in to Google Forms



 Google Forms is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

TO CONTINUE, FINISH REQUIRED FIELDS

Using the dropdown menu called "Spreadsheet" find the sheet that you created in step one. It will be called [CoSchedule] Marketing Form Question Template... unless you changed the name.



When this happens ...
1. New Response in Spreadsheet in Google Forms

▼ Choose App & Event

✓

▼ Choose Account

✓

Customize Response

Spreadsheet (required)

▼

Q Search...

[CoSchedule] Marketing Form Question Template

Sheet1

Then, choose Sheet1 in the drop-down menu under “Worksheet”.



When this happens ...

1. New Response in Spreadsheet in Google Forms



✓ Choose App & Event



✓ Choose Account



Customize Response

Spreadsheet **(required)**

[CoSchedule] Marketing Form Question Template



Worksheet **(required)**

Sheet1



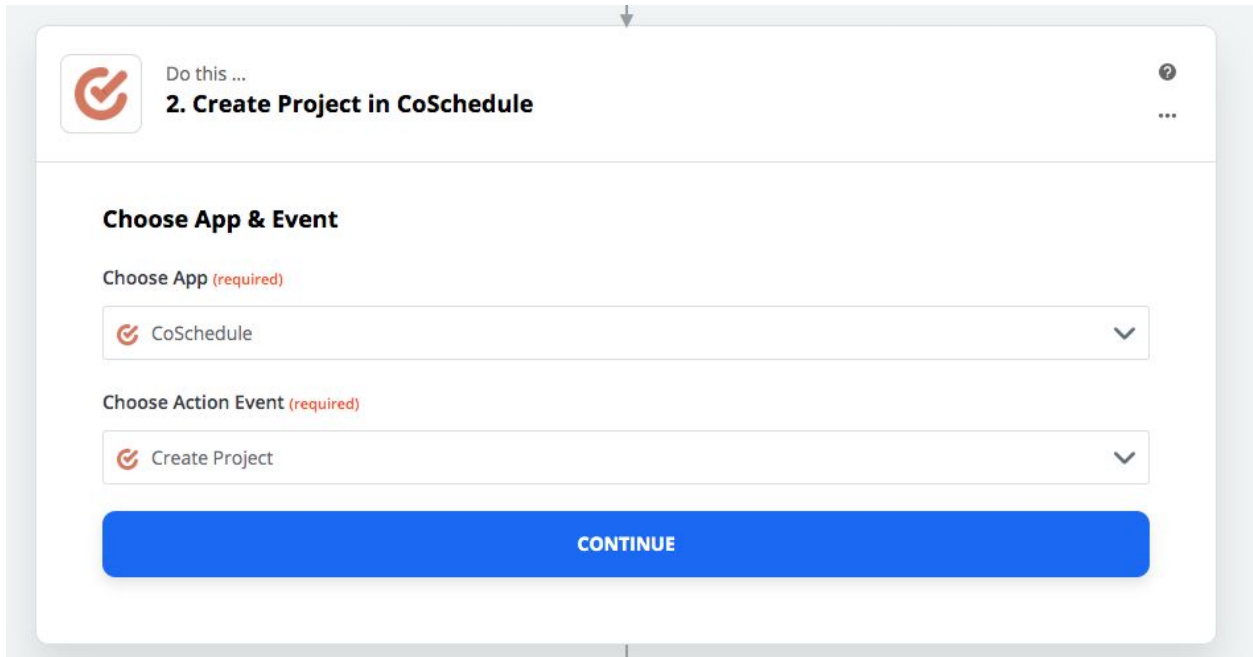
You *must* have column headers and at least one entry in your spreadsheet to view the available fields below. [See here for more information.](#)

↻ Refresh Fields

CONTINUE

Next, you'll continue on to the CoSchedule part of the Zap set up. You might need to copy and paste the API key from your CoSchedule calendar. [You'll find it in the integrations area on your CoSchedule calendar.](#)

Make sure the app and event are listed as Coschedule and Create Project. Then click continue.



Do this ...

2. Create Project in CoSchedule

Choose App & Event

Choose App *(required)*

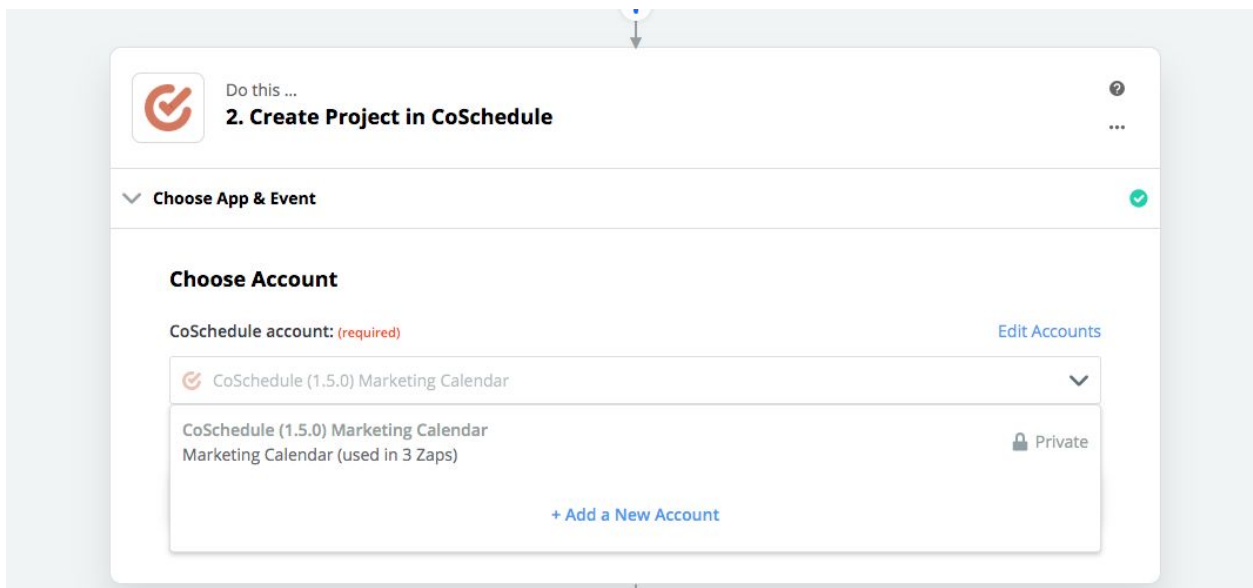
CoSchedule

Choose Action Event *(required)*

Create Project

CONTINUE

Choose your CoSchedule account and calendar from the drop-down list.



Do this ...

2. Create Project in CoSchedule

✓ **Choose App & Event**

Choose Account

CoSchedule account: *(required)* [Edit Accounts](#)

CoSchedule (1.5.0) Marketing Calendar

CoSchedule (1.5.0) Marketing Calendar
Marketing Calendar (used in 3 Zaps) Private

[+ Add a New Account](#)

Under the title field, find the option that says projectname.



Do this ...

2. Create Project in CoSchedule



✓ Choose App & Event


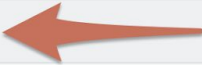



✓ Choose Account



Customize Project

Title (required)

	
emailaddress	
timestamp	Added by Zapier, ensuring we can access this spreadsheet. Feel free to delete it after you are all set up!
name	
projectname	
Content	timestamp: Added by Zapier, ensuring we can access this spreadsheet. Feel free to delete it after you are ...
description	
	

In the description field, choose the option that says “description” from the drop-down menu.


Customize Project


Title **(required)**

 gsx\$projectname: No data



Description **(optional)**

 gsx\$description: No data



name

projectname

Content timestamp: Added by Zapier, ensuring we can access this spreadsheet. Feel free to delete it after you are ...

description

ID cokwr

Updated 2019-09-26T16:47:04.782Z

duedate

priority

Select the date and time you want your project to be scheduled. (Defaults to the current date and time.)

Next, add yourself as the owner for all requests. This will give you a notification in your CoSchedule dashboard any time a new request is created. Find your name using the drop-down menu to add yourself as the owner.

Select the tags you want to associate with this piece of project.

Owner **(optional)** 1 2 3

Add a Search Step or

Select the team member who is

Status **(optional)**

Idea

Select the status you want to assign

Send To Ideas **(optional)** ☒ ☐

Yes

Jaden VanEckhout 112931

Ryan Holte 1193152

Leah DeKrey 410003

J.Morgan Legreid 47033

Lance 33095

Select "Yes" if you want to send this project to your Ideas instead of placing it on your calendar. (Note: Selecting "No" will place this content on your calendar with the scheduled date listed above.)

Finally, change the status to Idea, and say “Yes” to send the request to your Ideas Board.

Select the tags you want to associate with this piece of project.

Owner (optional) 1 2 3

Leah DeKrey

▼

Select the team member who is responsible for completing the project.

Status (optional)

Idea

▼

Select the status you want to assign to this piece of project.

Send To Ideas (optional) ● ○

Yes

▼

Select “Yes” if you want to send this project to your Ideas instead of placing it on your calendar. (Note: Selecting “No” will place this content on your calendar with the scheduled date listed above.)

↻ Refresh Fields

CONTINUE

When finished, you'll click “Continue” and finalize your Zap. A test will be sent to your calendar to make sure everything is connected correctly.

Step 4: Send the Google Form to Your Organization

Now that you've successfully set up your Zap. You'll need to tell everyone at your organization that they need to use the Google Form to request marketing collateral from now on.

Here's an example email you can steal to save time.

Hi everyone,

It's getting increasingly difficult to track incoming requests for marketing materials. In the interest of saving time and to avoid things getting lost in the shuffle, we will be implementing a new request form. Please fill this out whenever you require something from the marketing team. I recommend bookmarking the link for quick and easy access.

Once you submit a request using the form, I will send you a confirmation and expected timeline for delivery.

{INSERT THE LINK TO YOUR GOOGLE FORM}

Thanks for your cooperation.

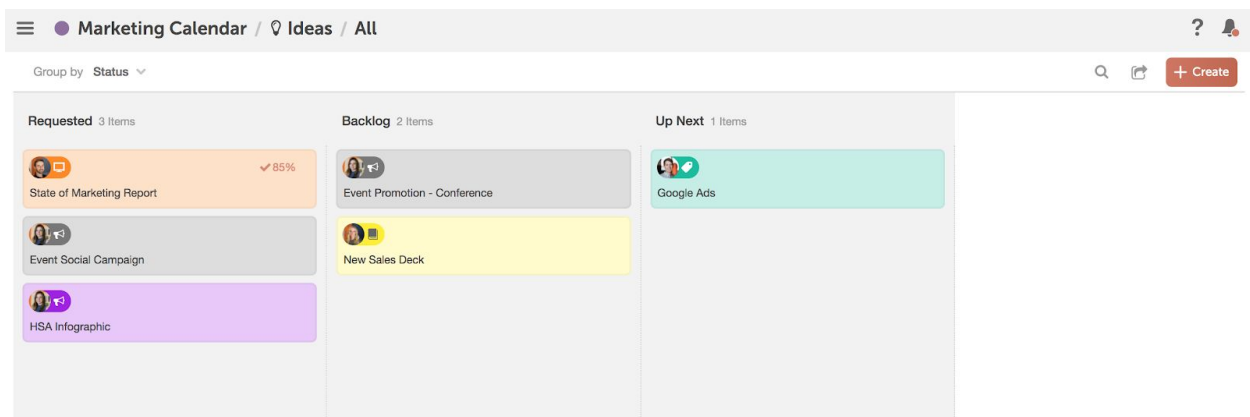
{YOUR NAME}

We also recommend bookmarking the link yourself for quick access when people inevitably forget to use it. You can simply respond by sending them the link again until they get the hang of the new process.

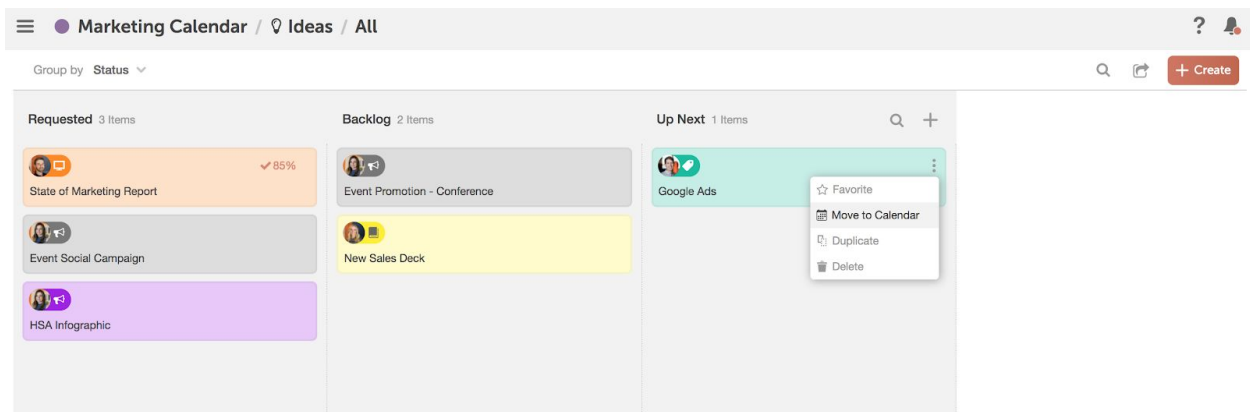
Step 5: Monitor Incoming Requests

As you start receiving incoming requests, monitor your Ideas Board. After you've seen the incoming request, move the project into the backlog column. This serves as a visual reminder that you know the request has been submitted and you've seen it in CoSchedule.

When projects increase in prioritization, move them to the up next column.



When you're ready to schedule the project and have your team start working on it, click the three dots in the corner of the project and select "Move to Calendar".



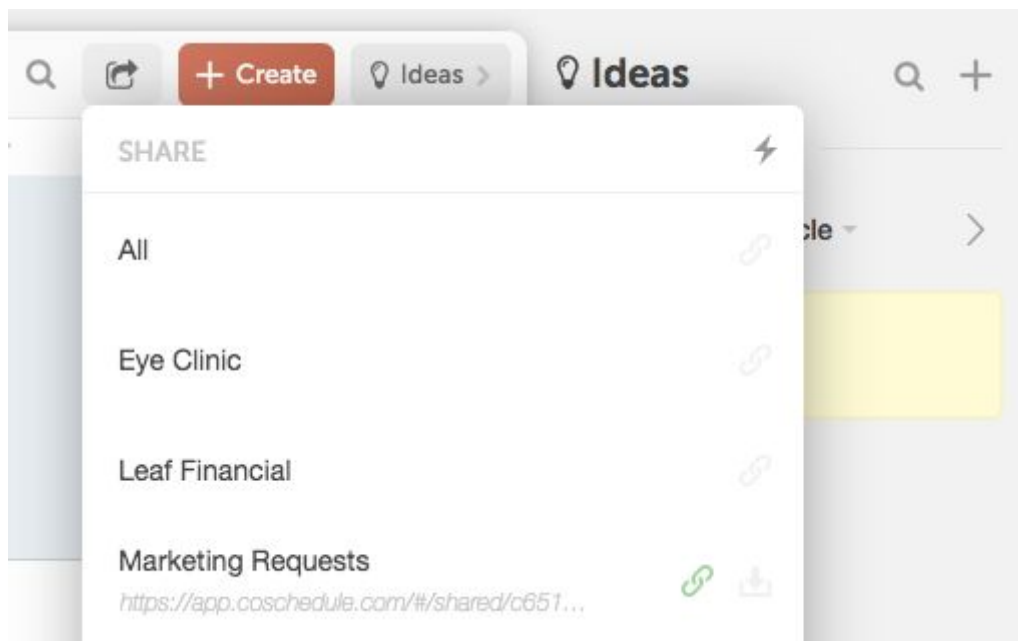
When scheduling the project, choose the date you want your team to start working on it.

Step 6: Share Project Progress With The Requester

In step 2, you created a saved view on your calendar. This creates a calendar view that visualizes all the marketing requests that your team is (or will be) working on.

This means you can create a read-only view to share progress with the individuals who have requested projects.

To create a read-only view, click share calendar and select your marketing request view.



This creates a read-only version of your calendar so coworkers without CoSchedule accounts can stay updated.

You can also choose to download the saved view as a PDF, rather than using a read-only link.