



ENGAGE

Leveraging the Query String in Forms

Pre-populate forms via the form URL



 smartsheet

ENGAGE

v.07/16

Legal

Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them.

Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

This presentation is proprietary to Smartsheet and the content herein is confidential and intended for permitted internal use only. This content shall not be disclosed to any third party that is not under an obligation of confidentiality to Smartsheet.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.

Speakers



Chad Eiring

Manager, Technical Account Management



Samuel Perez

Senior Technical Account Manager



Scan these QR codes



<https://app.smartsheet.com/b/form/d65a8051dd8c4802b0bc08092f8846c9?AttendeeType=Customer>



<https://app.smartsheet.com/b/form/d65a8051dd8c4802b0bc08092f8846c9?AttendeeType=Employee>



<https://app.smartsheet.com/b/form/d65a8051dd8c4802b0bc08092f8846c9?AttendeeType=Partner>

Table of contents

1

What is a query string, and how do you build one?

2


Practical examples of query strings

1

What is a query string, and how do you build one?

Samuel Perez

 smartsheet
ENGAGE



“ A query string is a part of a URL that assigns values to **specified parameters**”

https://en.wikipedia.org/wiki/Query_string

Forms



Create form...



Customer Satisfaction Survey - Greensboro Store

0 submissions ● Active



Customer Satisfaction Survey - Browns Mill Store

0 submissions ● Active



Customer Satisfaction Survey - Maryville Store

0 submissions ● Active

Forms



Create form...



Customer Satisfaction Survey - Elizabethon Store

0 submissions ● Active



Customer Satisfaction Survey - Erwin Store

0 submissions ● Active



Customer Satisfaction Survey - Kingsport Store

0 submissions ● Active



Customer Satisfaction Survey - Bristol Store



Customer Satisfaction Survey - Telford Store



Customer Satisfaction Survey - Greensboro Store



Customer Satisfaction Survey - Browns Mill Store

Forms



Create form...



Customer Satisfaction Survey - Elizabethon Store

0 submissions ● Active



Customer Satisfaction Survey - Erwin Store

0 submissions ● Active



Customer Satisfaction Survey - Kingsport Store

0 submissions ● Active



Customer Satisfaction Survey - Bristol Store

0 submissions ● Active



Customer Satisfaction Survey - Telford Store

0 submissions ● Active



Customer Satisfaction Survey - Greensboro Store

0 submissions ● Active



Customer Satisfaction Survey - Browns Mill Store

0 submissions ● Active



Customer Satisfaction Survey - Bristol Store

0 submissions ● Active



Customer Satisfaction Survey - Telford Store

0 submissions ● Active



Customer Satisfaction Survey - Greensboro Store

0 submissions ● Active



Customer Satisfaction Survey - Browns Mill Store

0 submissions ● Active



Customer Satisfaction Survey - Bristol Store

0 submissions ● Active



Customer Satisfaction Survey - Telford Store

0 submissions ● Active



Customer Satisfaction Survey - Greensboro Store

0 submissions ● Active



Customer Satisfaction Survey - Browns Mill Store

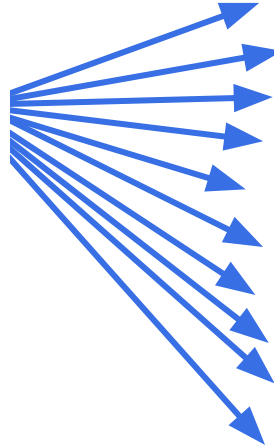
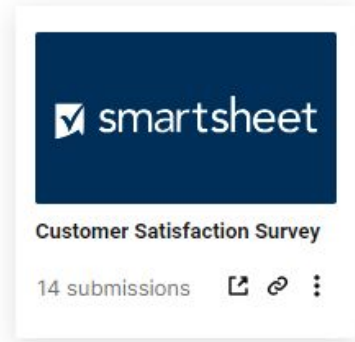
0 submissions ● Active

ENGAGE

Forms



Create form...



Form Link	StoreID
https://app.smartsheet.com	Elizabethton
https://app.smartsheet.com	Erwin
https://app.smartsheet.com	Kingsport
https://app.smartsheet.com	Bristol
https://app.smartsheet.com	Telford
https://app.smartsheet.com	Greensboro
https://app.smartsheet.com	Browns Mill
https://app.smartsheet.com	Elizabethton #2
https://app.smartsheet.com	Greensboro #2
https://app.smartsheet.com	Telford #2

Getting started

What do I need before I build my query string?



A link to the form

This will form the base of your query string.



Names of form fields

You must use the values **displayed in the form**.



Values to populate

This can be string values or values within a sheet.

Using SUBSTITUTE

Replacing existing text with new text in a string



SUBSTITUTE(search_text , old_text , new_text , [replace_num])

- search_text — The string containing the text that you want to replace
- old_text — The text string you want to replace
- new_text — The text string to replace old_text
- replace_num —[optional] The instance in search_text to replace old_text with new_text. If omitted, all instances are replaced.

Using SUBSTITUTE

Replacing existing text with new text in a string

SUBSTITUTE(search_text , old_text , new_text)

<https://app.smartsheet.com/b/form/f13ebfd7020?SalesRep=Sally.Smart@smartsheet.com>



SUBSTITUTE(<Query String>,

" ",

"%20")



<https://app.smartsheet.com/b/form/f13ebfd7020?Sales%20Rep=Sally.Smart@smartsheet.com>

Creating a query string

Manual option

Define one or two values on a case-by-case basis

1. Add a question mark (?) to the end of the URL
2. Enter the first field name
3. Add an equal sign (=)
4. Enter the first field value
5. Separate field/value pairs with an ampersand (&)
6. Replace all special characters with percent encoding



Tip: A list of common percent encodings is in the Smartsheet Help article: **Use a URL query string to prefill default values on a form.**

Creating a query string

Manual option



MBFCORP

MBFCORP

Search...

Search...

File Automation Forms Connections Dynamic View

TC1 - Store Feedback Form Data

Share

Grid View Filter Arial 10 B I U

	Source	Store	Experience	Experience Score	Satisfaction	Satisfaction Score	Total Score	Comments
1								
2								
3								
4								
5								
6								
7								
8								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								

Great!

UTF-8 INS

Creating a query string

Formula option

Automate the creation of links to define multiple values, or values which change frequently

Creating a query string

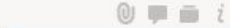
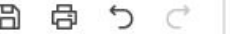
Formula option



Asset Inspection Report

app.smartsheet.com/b/form/4223340541e64adfa807113acf9f23a?Task%20ID=MBF-0688&Asset%20Type=Trencher&Asset%20ID=5859

File Automation



1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16



Asset Inspection Report

Asset Type *
Trencher

Asset ID *
5859

Condition State *

- Dangerous/Do Not Use
- Major Repair Needed
- Minor Repair Needed
- Cosmetic Issue
- No Issue Noted

Condition Notes *
Use NA for "No Issue Noted" only

NA

Operation State *

- Inoperable
- Operation Suspended
- Operable - Short Term Only
- Operable - No Impact



Asset Type}@row

e

C

load

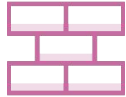
le

trace



Benefits of using query strings

- Save time and effort for form submitters by pre-populating values
- Reduce manual data entry errors by leveraging data already in a sheet
- Use one base form for multiple use cases



Limitations

- Should not be used to send sensitive information like SSNs and PHI (a query string goes across the internet as readable text)
- Smartsheet cell character limits (4,000 characters)
- Formula URLs cannot be reformatted to clickable text hyperlinks
- Changes to field names used in the query string will need to be updated wherever the link is available

2

Practical Examples of Query Strings

Chad Eiring

 smartsheet
ENGAGE

Use Case #1 - Maintenance Requests



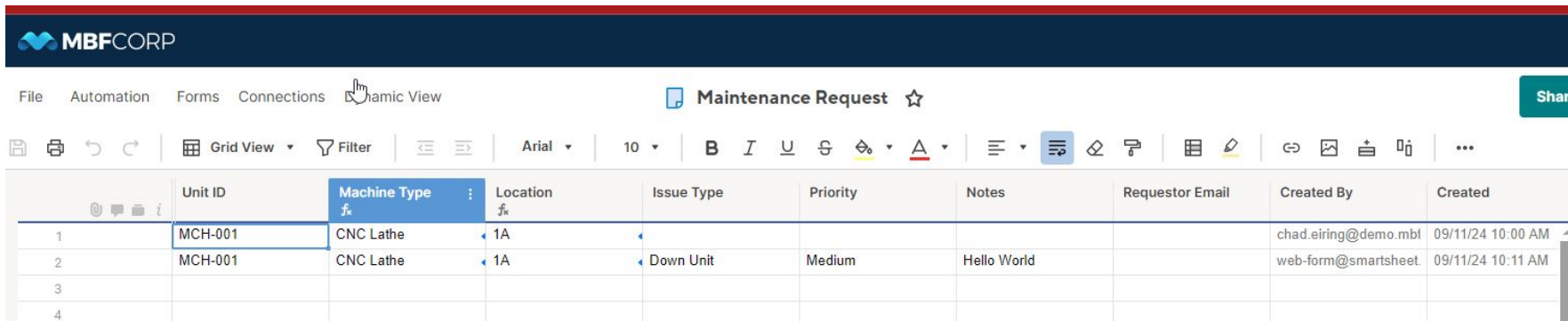
Use Case #1 - Maintenance Requests

- I am a service technician for a factory. We are currently using email to allow an operator to submit a request for maintenance on machines in the factory
 - Emails are not followed up on in a timely manner, or are missed entirely
 - Only two people have access to the inbox
 - No one knows the status of their requests so additional emails are being sent that need manual follow up
 - No priority system in place

I just learned about Smartsheet Form Query Strings at Engage, and I think they can help!

Maintenance Request Intake Sheet

This sheet will hold all of the form submissions and is the start of the maintenance process



The screenshot shows a Smartsheet interface for a 'Maintenance Request' form. The top navigation bar includes 'File', 'Automation', 'Forms', 'Connections', and 'Dynamic View'. The main title is 'Maintenance Request' with a star icon. A 'Share' button is visible in the top right. The table below has columns for Unit ID, Machine Type, Location, Issue Type, Priority, Notes, Requestor Email, Created By, and Created. Two rows of data are visible, with the second row containing a 'Down Unit' issue and the note 'Hello World'.

	Unit ID	Machine Type	Location	Issue Type	Priority	Notes	Requestor Email	Created By	Created
1	MCH-001	CNC Lathe	1A					chad.eiring@demo.mbl	09/11/24 10:00 AM
2	MCH-001	CNC Lathe	1A	Down Unit	Medium	Hello World		web-form@smartsheet.	09/11/24 10:11 AM
3									
4									

Maintenance Request

Requestor Email

Issue Type

Priority

Notes

Send me a copy of my responses

Submit

Maintenance Request Form

This is the form that will open when a QR Code is scanned

Unit ID is hidden, because it is filled in by a query string

This QR code is for MCH-001



Machine Inventory Sheet


Used to hold a list of all machines and to generate QR Codes

MBFCORP

File Automation Forms Connections Dynamic View

Machine Inventory ☆

Grid View Filter Arial 10 B I U S A

	Machine ID	Machine Type	Status	Operating Hours	Production Rate (units/ho...	Last Maintena... Date	Temperat... (°C)	Vibration (mm/s)	Energy Consump... (kWh)	Location	URL	QR Code
1	MCH-001	CNC Lathe	Running	1,200	25	08/01/24	75	2.1	150	1A	https://app.smartsheet.	
2	MCH-002	Injection Molder	Idle	980	0	09/05/24	60	1.5	120	1B	https://app.smartsheet.	
3	MCH-003	Assembly Robot	Running	2,500	100	09/10/24	65	2	200	1C	https://app.smartsheet.	
4	MCH-004	Milling Machine	Maintenance	3,000	0	08/15/24	80	3.5	175	2A	https://app.smartsheet.	
5	MCH-005	Conveyor Belt	Running	4,500	200	08/20/24	45	1	90	2B	https://app.smartsheet.	
6	MCH-006	Press Machine	Running	3,600	50	09/01/24	70	2.8	160	2C	https://app.smartsheet.	
7	MCH-007	Welding Station	Idle	2,000	0	09/08/24	50	2.3	110	2D	https://app.smartsheet.	
8	MCH-008	Packaging Machine	Running	1,800	75	09/03/24	55	1.7	130	2E	https://app.smartsheet.	
9	MCH-009	Laser Cutter	Running	2,200	30	09/12/24	85	3	190	3A	https://app.smartsheet.	
10	MCH-010	Grinder	Maintenance	3,200	0	09/07/24	78	3.8	180	3B	https://app.smartsheet.	
11												

Solution Demonstration!

Use Case #2 - Similar Project Requests

- I am responsible for entering project requests for a PMO. We currently use one form in order to input many fields for the submission of a project.
 - The form can take a long time to fill out
 - There are other projects requests that are similar that also need to be submitted
 - I have to start over for each project request I submit, which takes a considerable amount of time
 - I only have view access to the project intake sheet

I just learned about Smartsheet Form Query Strings at Engage, and I think they can help!

Project Request Intake Sheet

smartsheet

RUN CONFIG

1 Details 2 Preview 3 Confirm

Review and confirm the config you want to run.

Source Sheet
Name

Target Sheet(s)
Name(s)

Lookup Values

Data Field 1

Data Field 2

Data Field 3

Data Field 4

Options

Overwrite Existing Data in Target Sheet(s)

Duplicates in the Source Sheet

Data Mapping Format

Execution Frequency

Config Name
Name

URL Staging Sheet



File Automation Forms Connections Dynamic View

Project Form URL ☆

Grid View Filter Arial 10 B I U S A

	Project ID	Form URL	Project Name	Description	Region	Project Type	Start Date
1	001	https://app.smartsheet.com	Mobile%20Banking%20App%	This%20project%20foc	East%20Asia%20and%	Software%20Developm	11/11/24
2	002	https://app.smartsheet.com	New%20Product%20Launch%	The%20objective%20o	Latin%20America%20a	Product%20Launch	10/14/24
3	003	https://app.smartsheet.com	Office%20Network%20Infrastr	This%20project%20air	North%20America	Infrastructure%20Upgr	09/30/24
4	004	https://app.smartsheet.com	Customer%20Service%20Wo	The%20goal%20of%20C	North%20America	Process%20Improvem	10/24/24
5	005	https://app.smartsheet.com	Legacy%20System%20Data%	This%20project%20inv	South%20Asia	Infrastructure%20Upgr	11/27/24
6							

Project Request Intake Sheet w/ URL

The screenshot shows a Smartsheet interface for a 'Project Intake' sheet. The table contains the following data:

	Form URL	Project Name	Description	Region	Project ID	Project Type	Start Date
1	=INDEX((Project Form URL Project ID), 0)			East Asia and Pacific	001	Software Development	11/11/24
2	https://app.smartsheet.com	New Product Launch – Digital Marketing	The objective of this project is to execute a digital marketing campaign for the launch of a new line of eco-friendly skincare products. The campaign will leverage social media platforms, email marketing, and targeted ads to raise brand awareness and drive sales. Key deliverables include social media content, influencer collaborations, and a landing page for product purchases. Success will be measured by increased website traffic, customer engagement, and sales conversions.	Latin America and Caribbean	002	Product Launch	10/14/24
3	https://app.smartsheet.com	Office Network Infrastructure Upgrade	This project aims to modernize the company's office network infrastructure to support higher data volumes and enhance security. It includes upgrading routers, switches, firewalls, and wireless access points to meet current performance standards. Additionally, the network will be reconfigured to provide better connectivity and data flow for remote and on-site employees. The project's success will be evaluated based on improved network speed, stability, and security.	North America	003	Infrastructure Upgrade	09/30/24
4	https://app.smartsheet.com	Customer Service Workflow Optimization	The goal of this project is to improve the efficiency and effectiveness of the customer service department by re-engineering current workflows. Through process mapping, bottleneck analysis, and the introduction of automation tools, the project aims to reduce the average response time to customer inquiries and improve customer satisfaction. Key milestones include identifying process inefficiencies, implementing software automation, and training staff on the new system.	North America	004	Process Improvement	10/24/24
5	https://app.smartsheet.com	Legacy System Data Migration to Cloud	This project involves migrating company data from a legacy on-premises database to a modern cloud-based solution. The goal is to ensure a smooth transition with minimal downtime while improving data accessibility and scalability. The project will include data extraction, transformation, and loading (ETL), along with validation to ensure data integrity. Deliverables include cloud infrastructure setup, database migration, and post-migration testing.	South Asia	005	Infrastructure Upgrade	11/27/24
6							
7							
8							

Solution Demonstration!

What else is possible?

- Automatically Create QR Codes via the API
- Build a maintenance request dashboard that shows the status of all requests
- Use the intake to kick off another sheet or SCC based process to get the work completed

- **Other similar Use Cases**

- IT hardware tickets
- Other Maintenance Requests
- Feedback Requests



Learning objectives: Recap

- Understand what a query string is
- Be able to create a query string manually and with a formula
- Understand practical examples of query strings

Register for upcoming User Groups



Continue to expand your Smartsheet skills and connections by attending a **User Group**.

Smartsheet User Groups

- **Discover** how others are using Smartsheet
- **Network** with the Smartsheet team and your peers
- **Virtual** and **in-person** events around the globe

Next steps...

- Review the other “Stretch your power user skills” sessions
- Go try query strings yourself
- Come talk to us at the Professional Service, Support, or Technical Solutions Engineering booths

Take the survey

We'd love to hear your thoughts on the session.

**Open this session in the mobile app, click “Survey,”
and answer two questions — it's that easy!**

Thank you.

 smartsheet

ENGAGE

Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.



@smartsheet



@smartsheetplatform



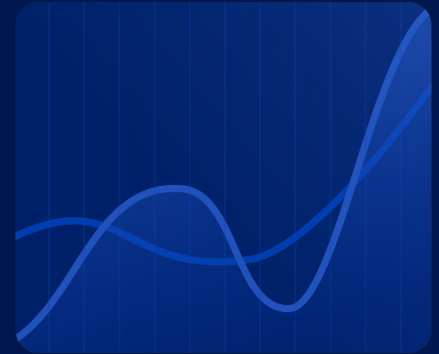
@smartsheet



@smartsheet



@smartsheet



smartsheet

ENGAGE