Getting Started with Your First Solution

October 8, 2023

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Today’s speakers

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Sr. Director, Product Management

Daniel Zarovy
Principal Product Manager

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Table of contents

How to build your first solution in Smartsheet

1

Introduction & learning objectives

2

The Basics:
Building and collaborating on your first solution

3

Next Level:
Using “Aha!” features

4

Putting it all together:
Event Planning

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1

Introduction & learning objectives

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Learning Objectives

1. Create

How to get started

2. Connect

How it all works together

3. Customize

How to build it out

4. Collaborate

How to collaborate for success

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“We can all go off of 1 sheet and be able to, at the same time, message each other, add attachments and links,

all in one place.

Versus like a spreadsheet [in Excel], ... it's just so much easier through Smartsheet when there's that ‘Assigned To’ check...”

User at a Manufacturing company

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2

The Basics: Building and collaborating on your first solution

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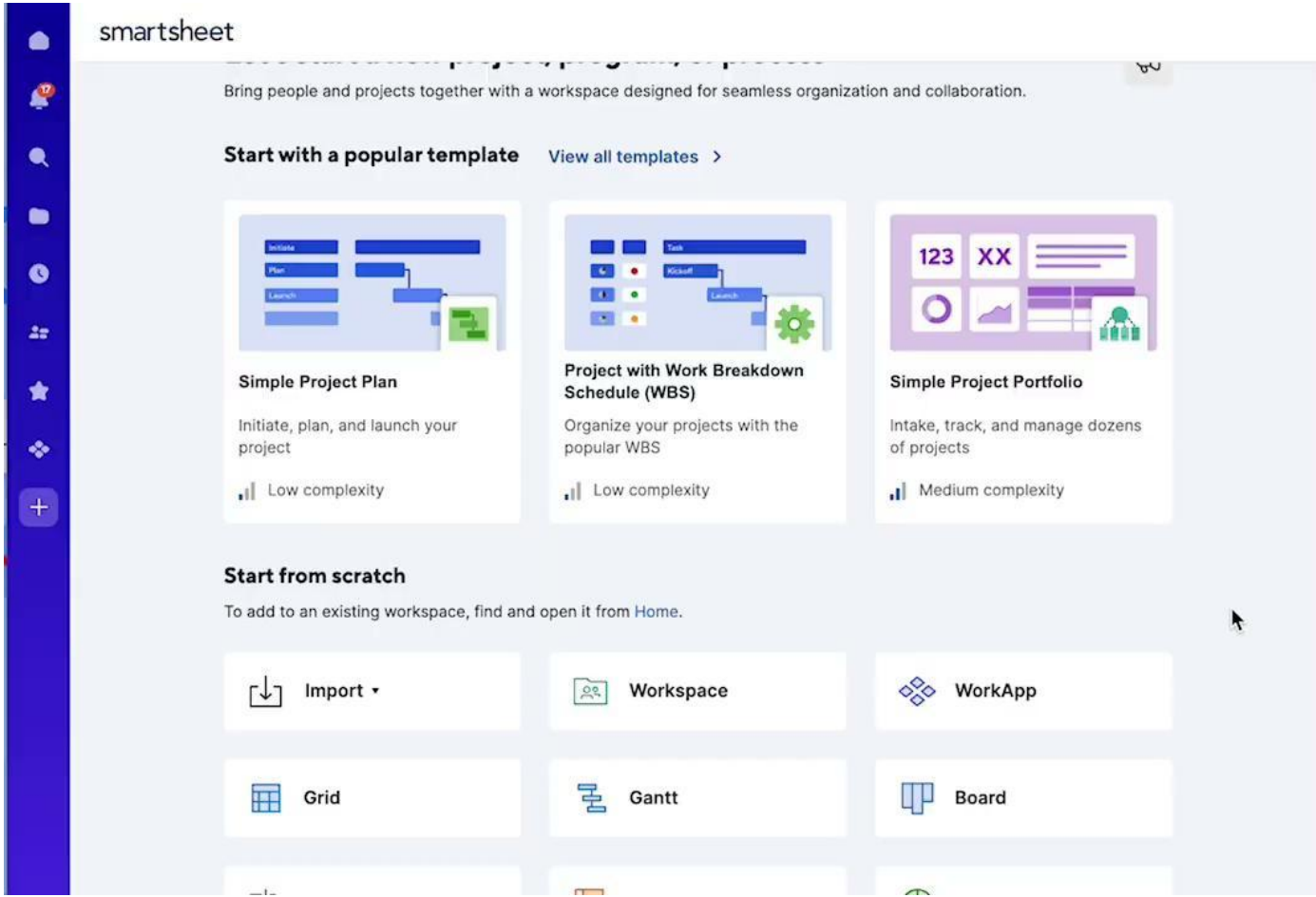
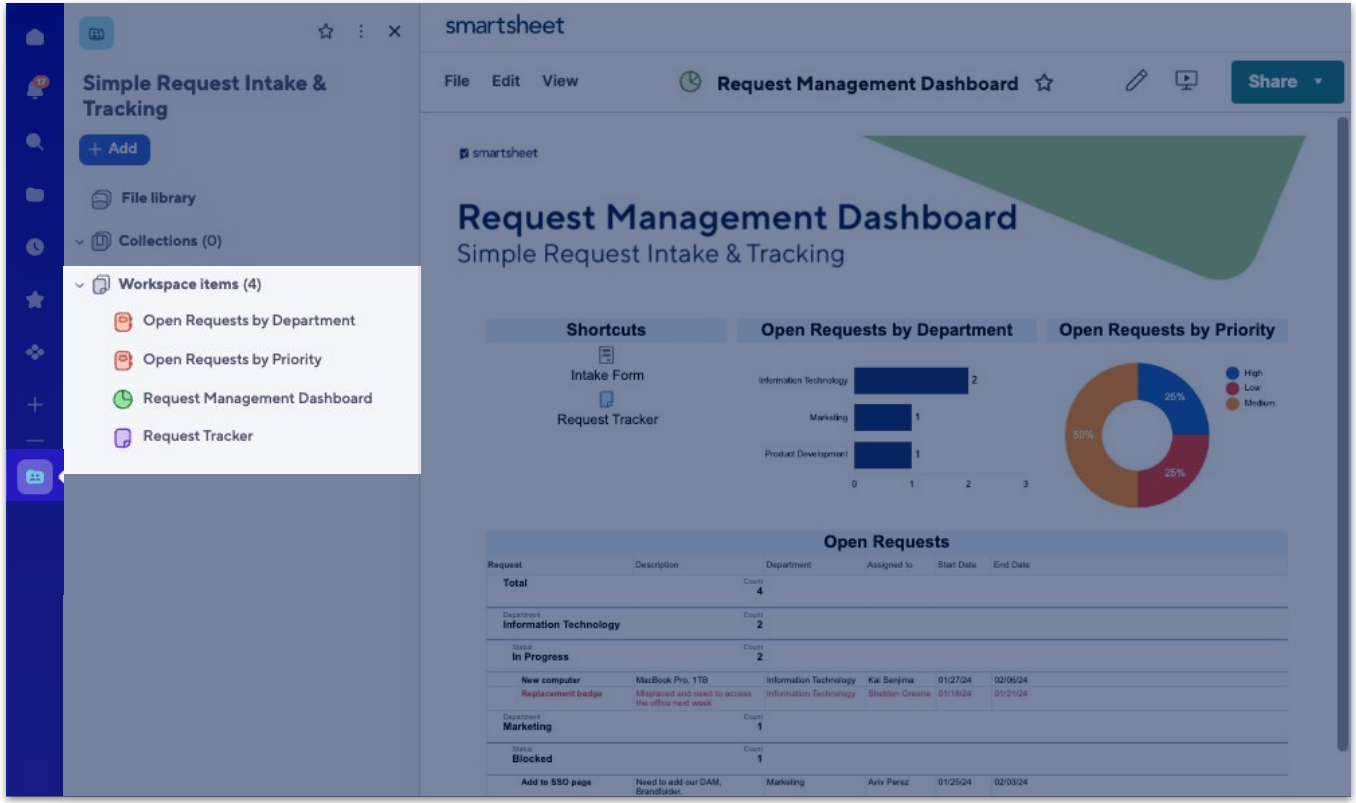
Create

Ways to begin:

- Start from scratch
- Import
- Template



Connect



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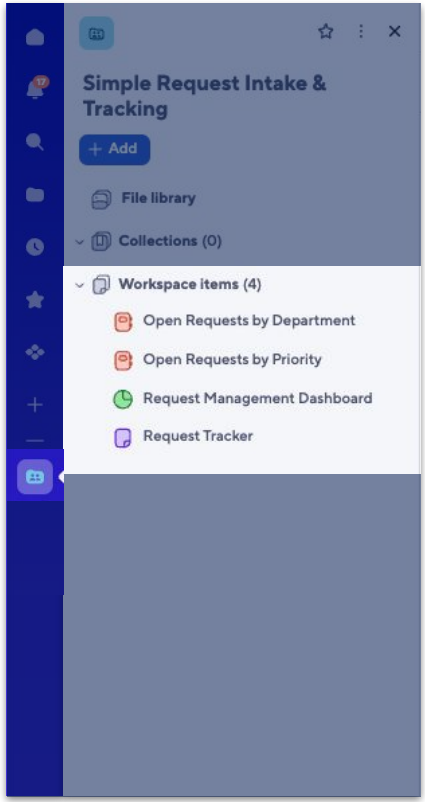
Connect



Workspace Items

Automation:
Request Status Updates

Report:
Requests by Department

Tracker **Sheet**

Dashboard

Report:
Requests by Priority

Form:
Collect Requests

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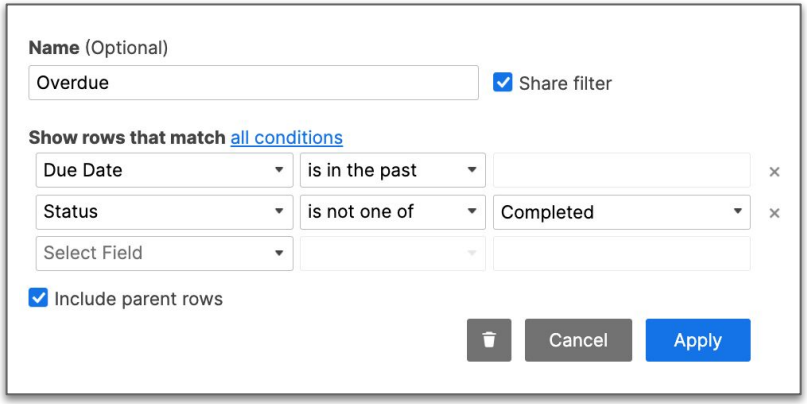
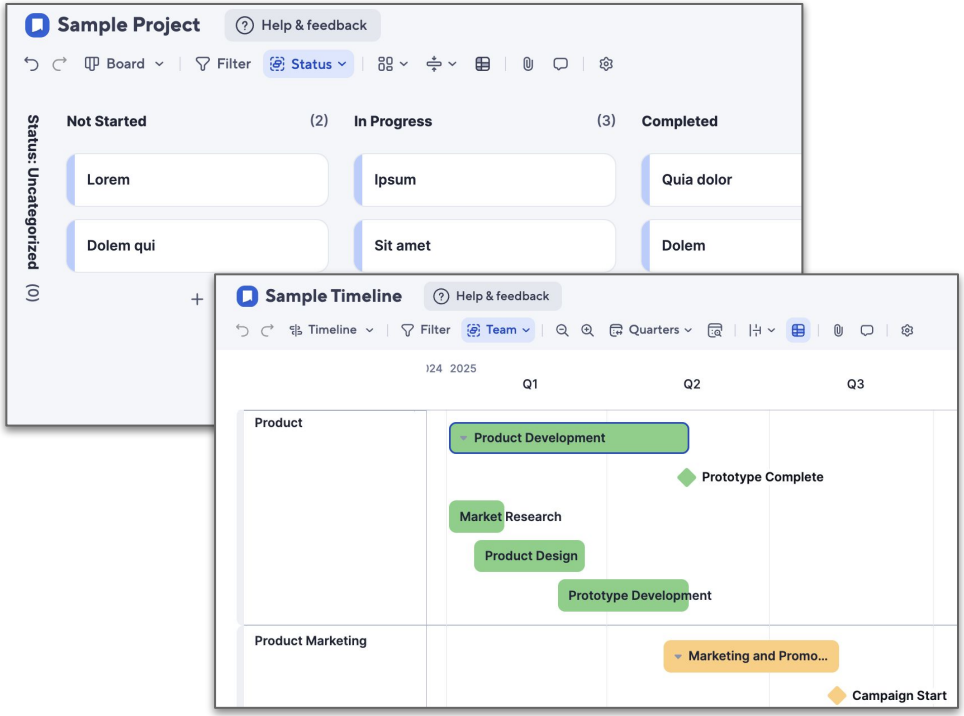
Customize



Filters



Views

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Collaborate

	Work with colleagues	Inform stakeholders
@Mention in Comments	●	◒
Assign task in “Contacts” column	●	◒
Share & Assign Permissions	●	◒
Request Updates / Reminders	●	◒
Resource Management	●	◒
Send Row	●	◒
Shared Filters	●	◒
Publish	◒	●
Share a Dynamic View	◒	●
Share a Proof	◒	●

● Common Use Case

◒ Uncommon Use Case

3

Next Level:
Using “Aha!” features

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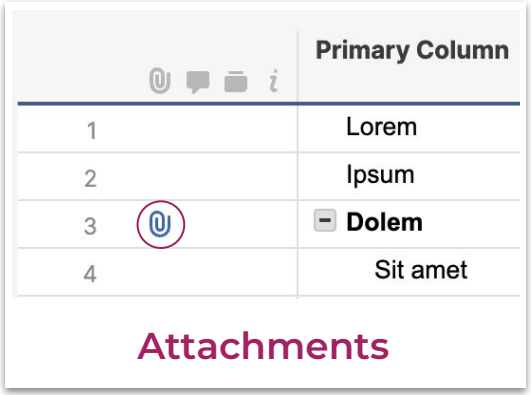
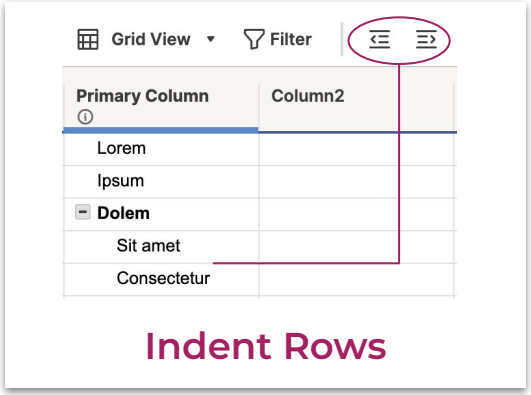
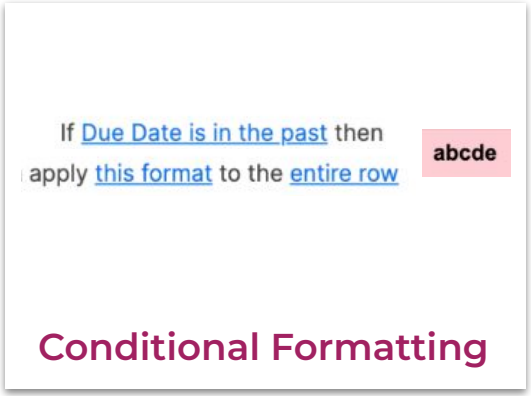
Organize Information



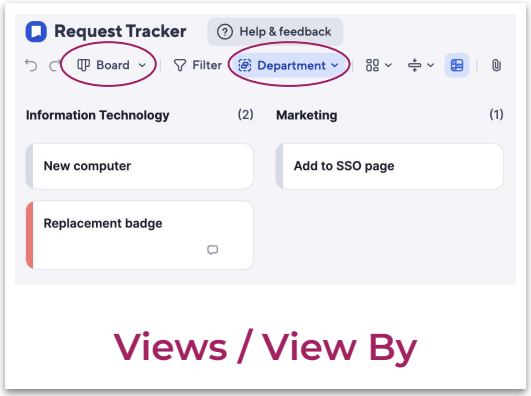
Attachments



Indent Rows



Conditional Formatting



Views / View By

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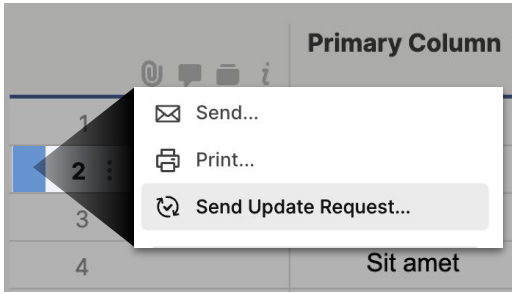
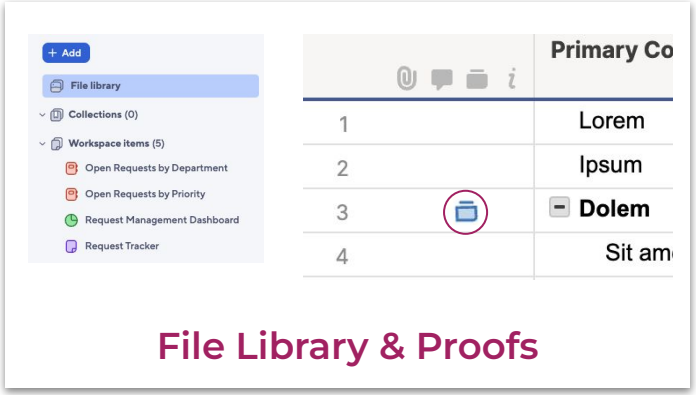
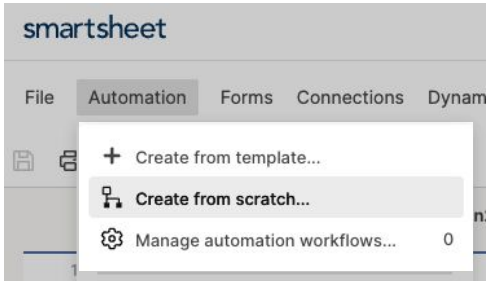
Work Asynchronously



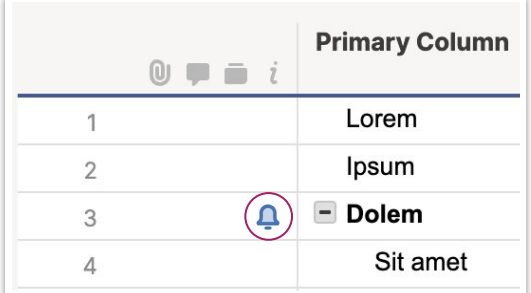
Request Updates



File Library & Proofs



Custom Automations



Reminders

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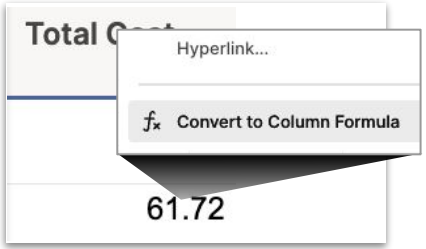
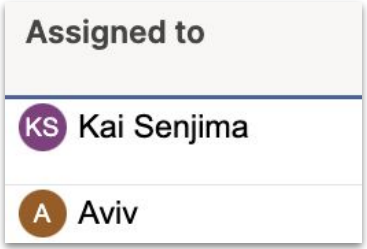
Customize Columns

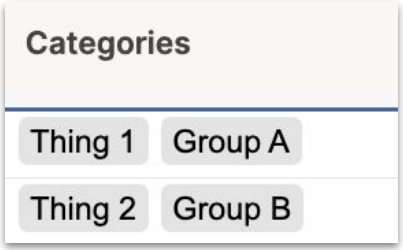


Column Formula



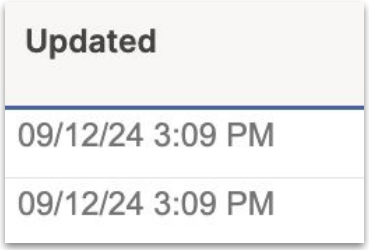
Contacts

Duration



Multi-value Dropdown

Symbols Dropdown



Date/time Stamps

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“They fill out a form. It [automatically] goes to the director of their area. Once their director approves it, it [automatically] comes back to my boss. She looks at it and assigns it to a project manager. The project manager [automatically] gets alerted that they have a project.

It’s saved us so much time ”

A user in the Housing and Dining Services for a university

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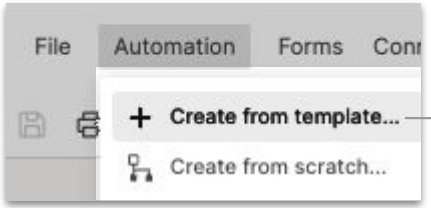
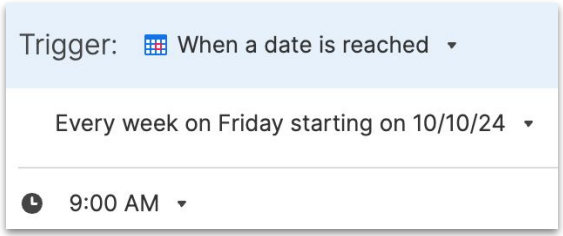
Deep Dive: Automate Update Requests



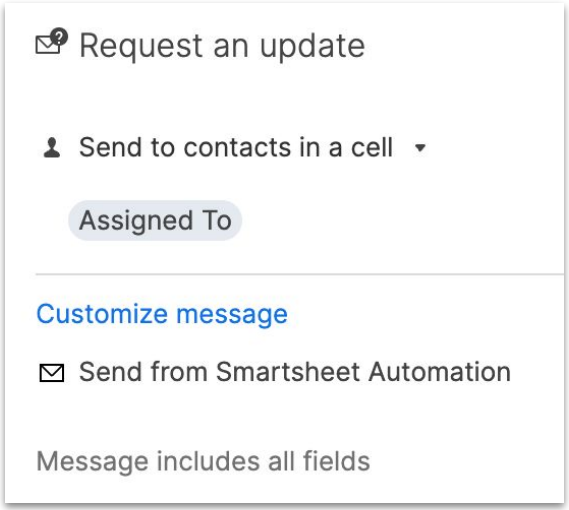
- Request *Weekly* Update
- Request Update when *criteria* are met
- Request *Approval* when criteria are met

Trigger

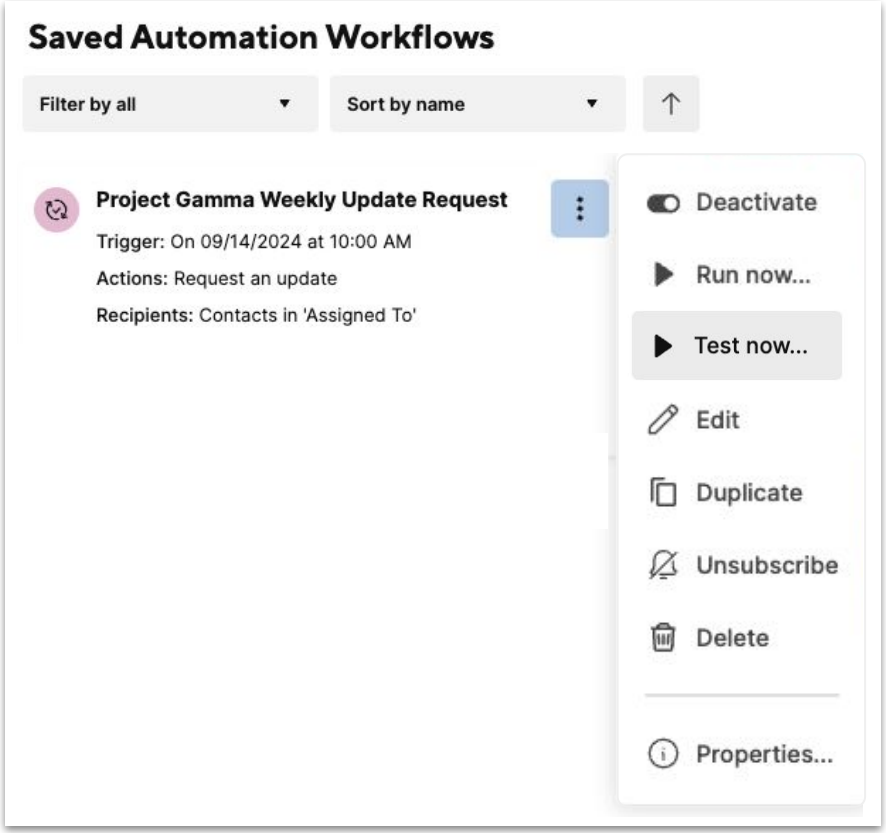


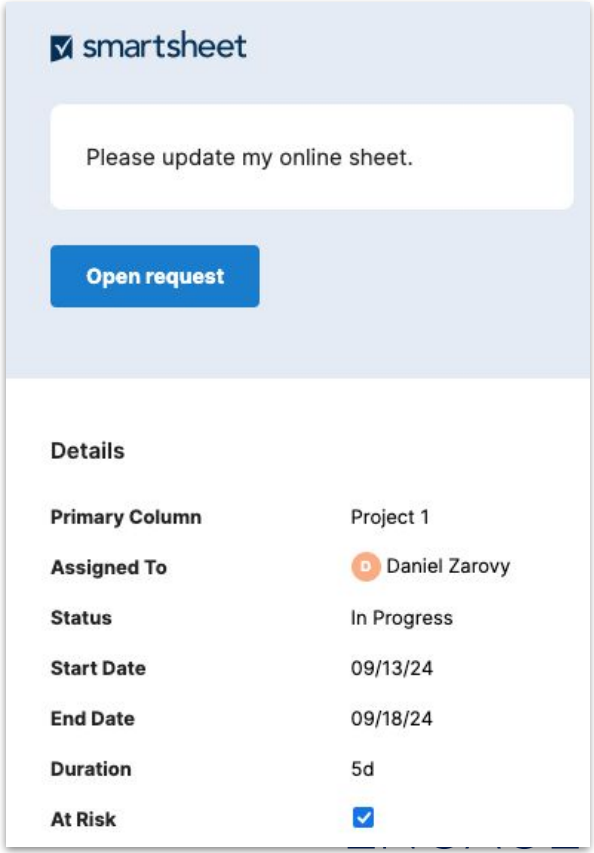
Conditions

Message Content



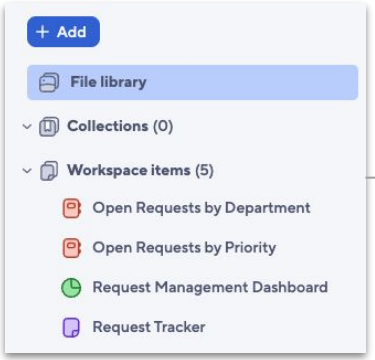
Deep Dive: Automatic Update Requests



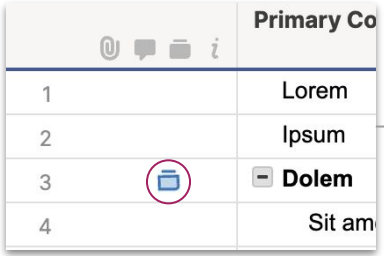


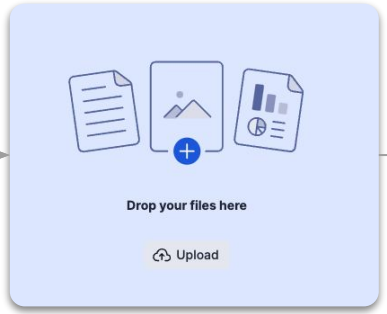
Deep Dive: File Library & Proofs

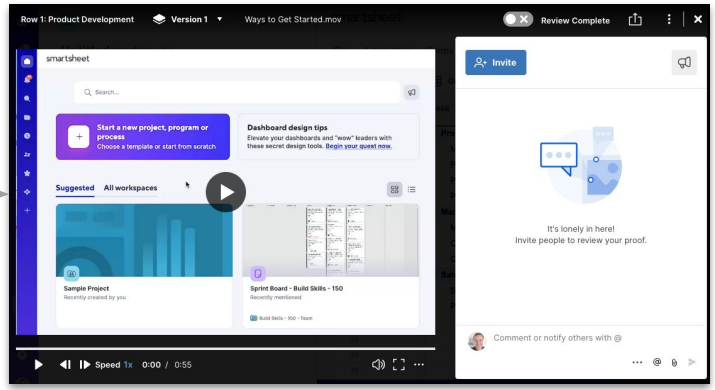
Workspace Level



Row Level







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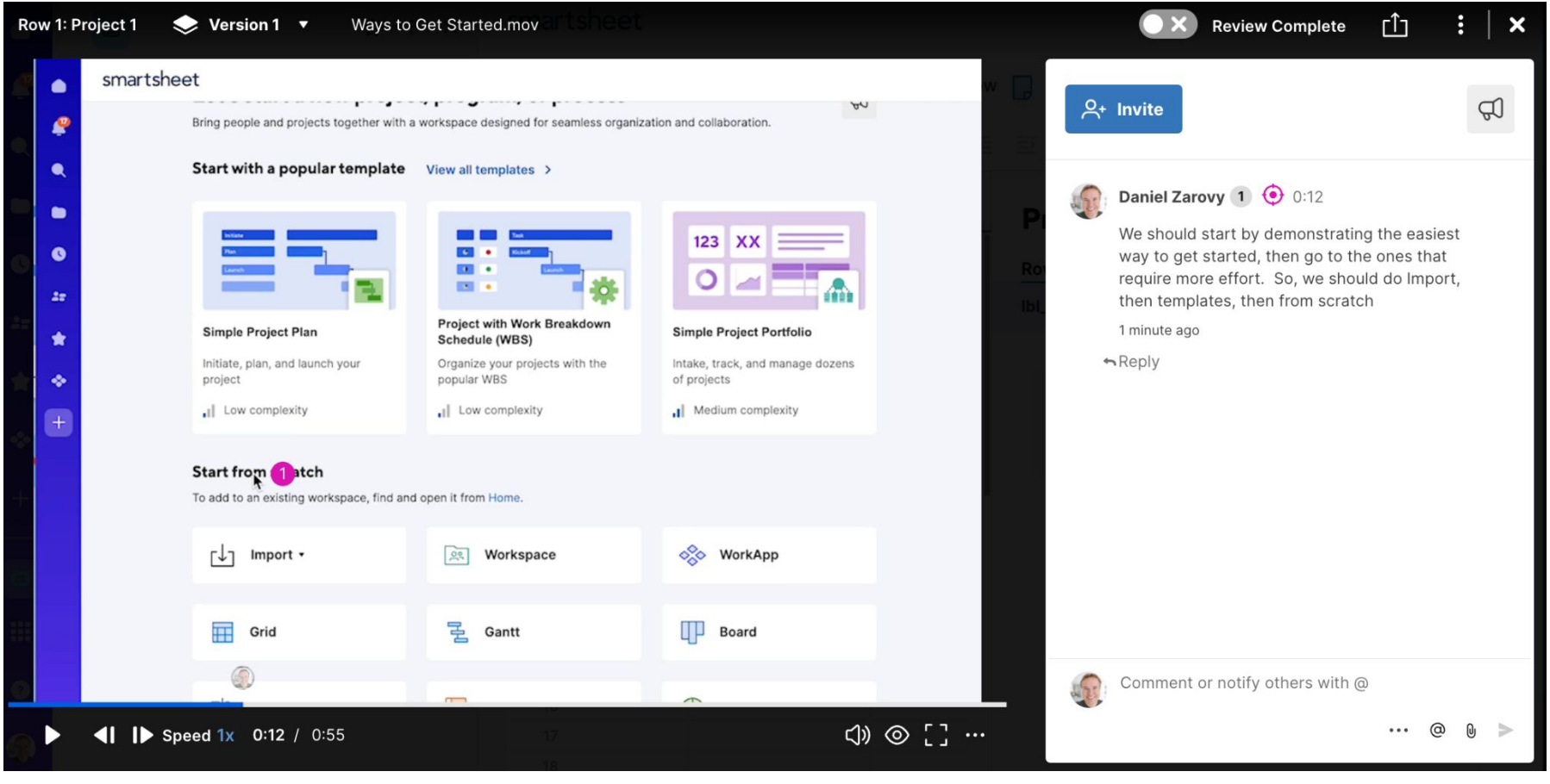
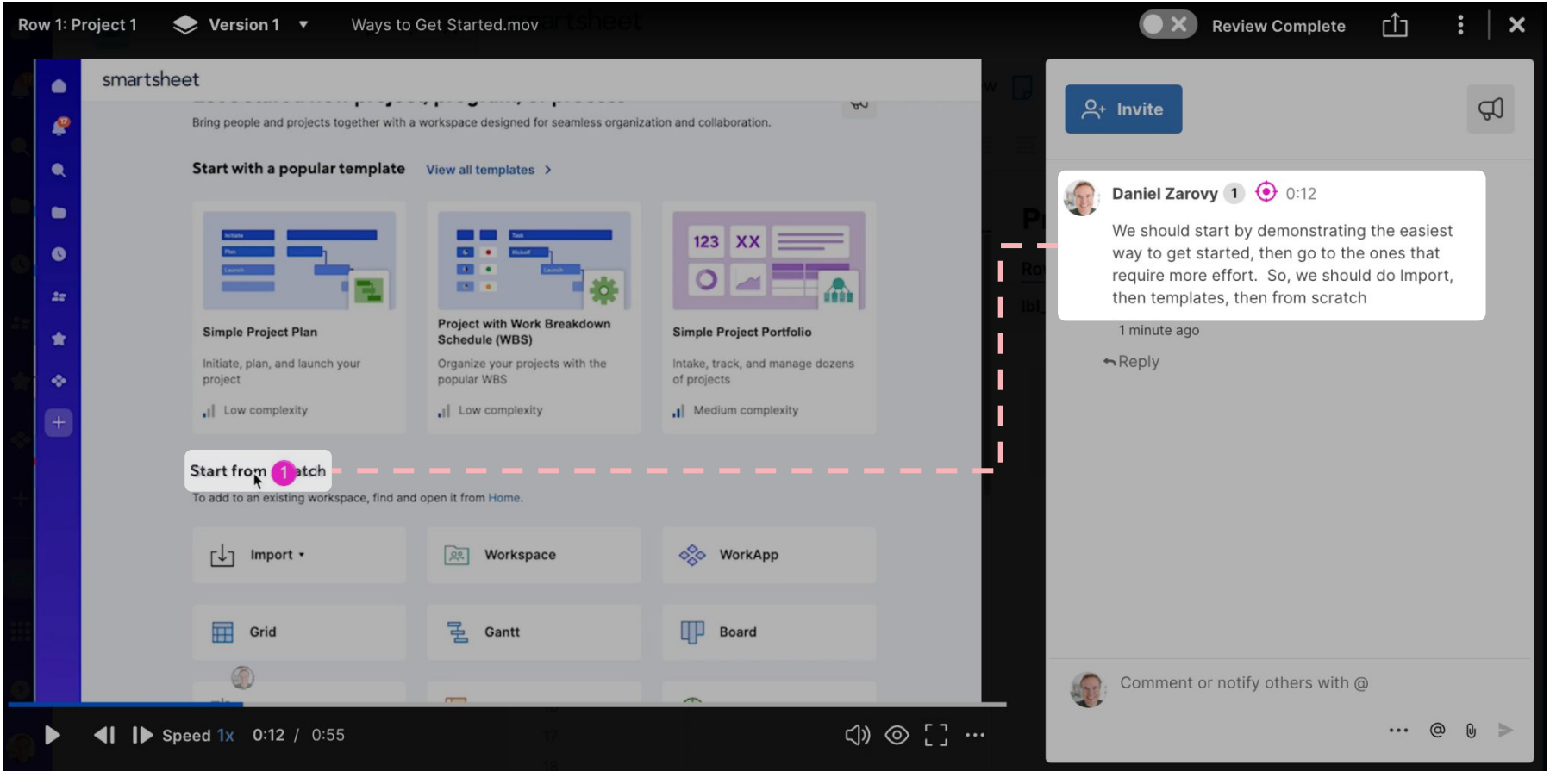
Deep Dive: Proofs



Deep Dive: Proofs



4

Putting it all together: Event Planning

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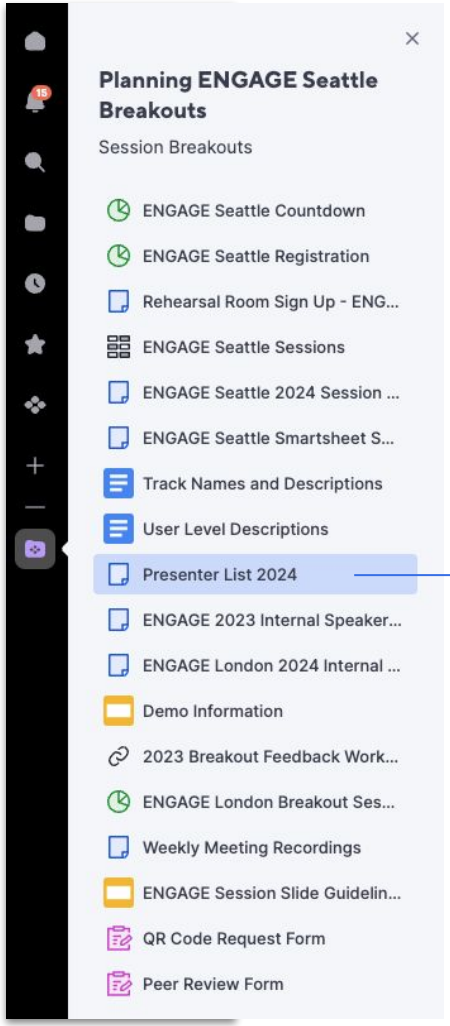

Who are the presenters?

What session(s) are they presenting?

What information can we share about them?

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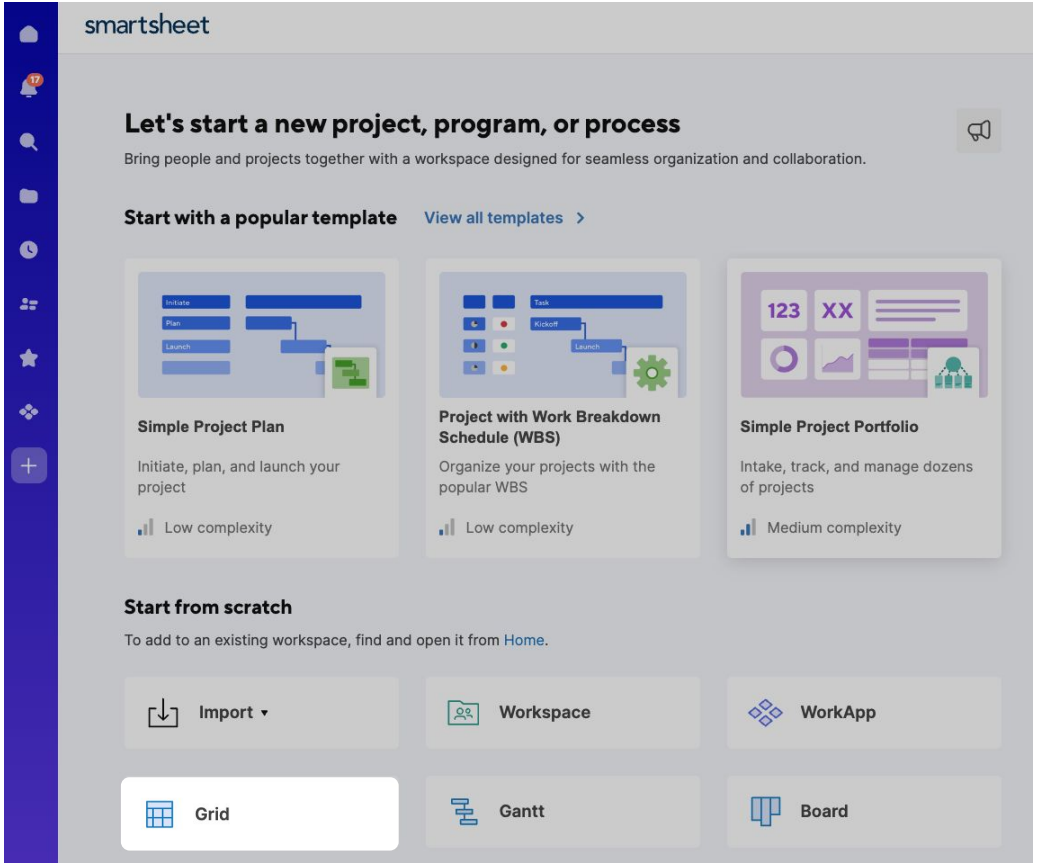
Global Create

↓

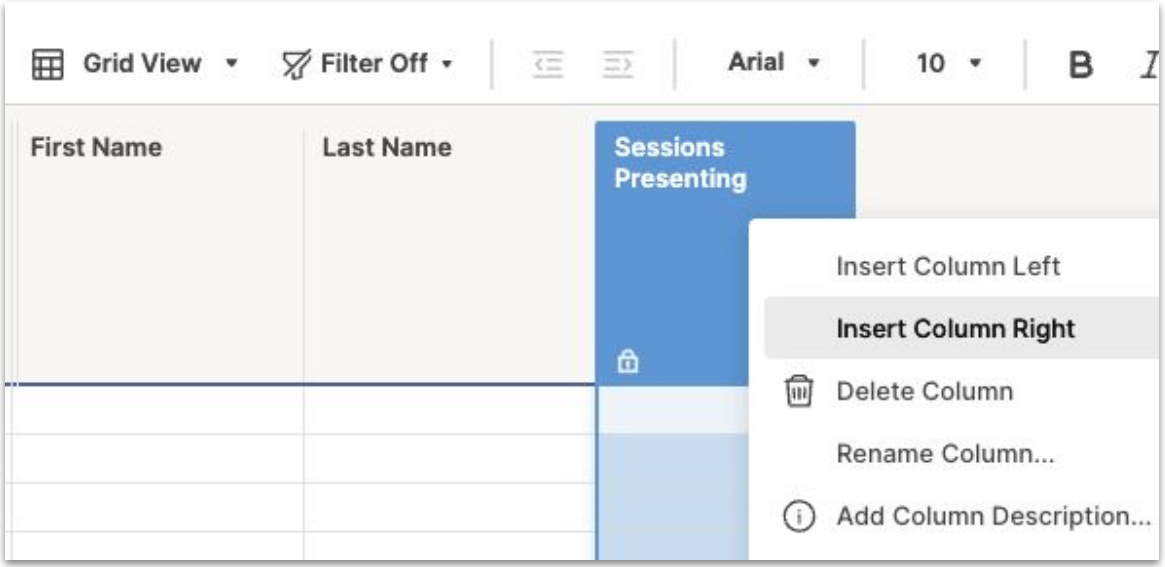
Create Grid



Global Create

Create Grid

Setup Columns



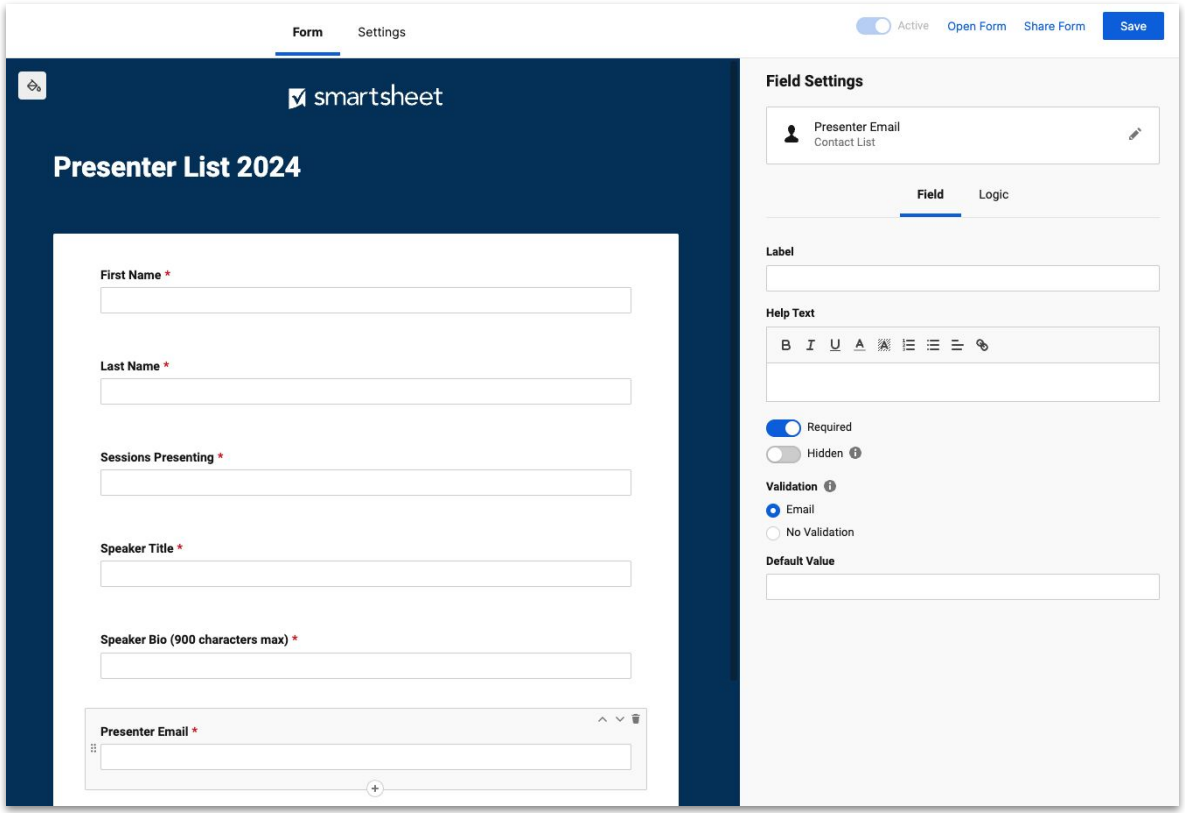
Global Create

Create Grid

Setup Columns

Create Form

Customize Form



Global Create

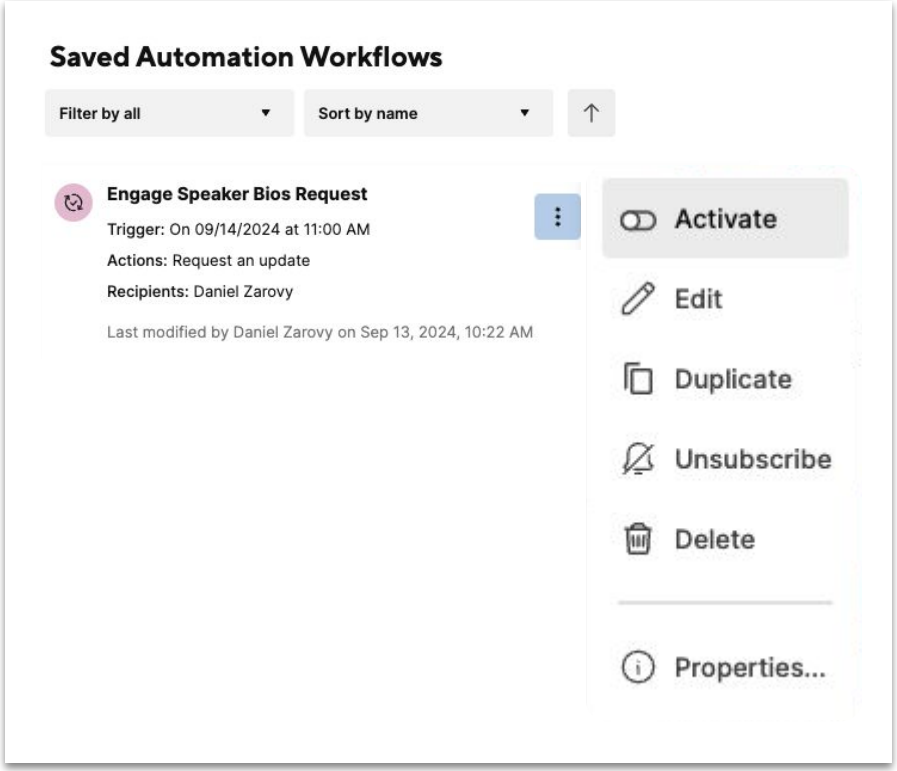
Create Grid

Setup Columns

Create Form

Customize Form

Automate Sending Form



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Global Create

↓

Create Grid

↓

Setup Columns

↓

Create Form

↓

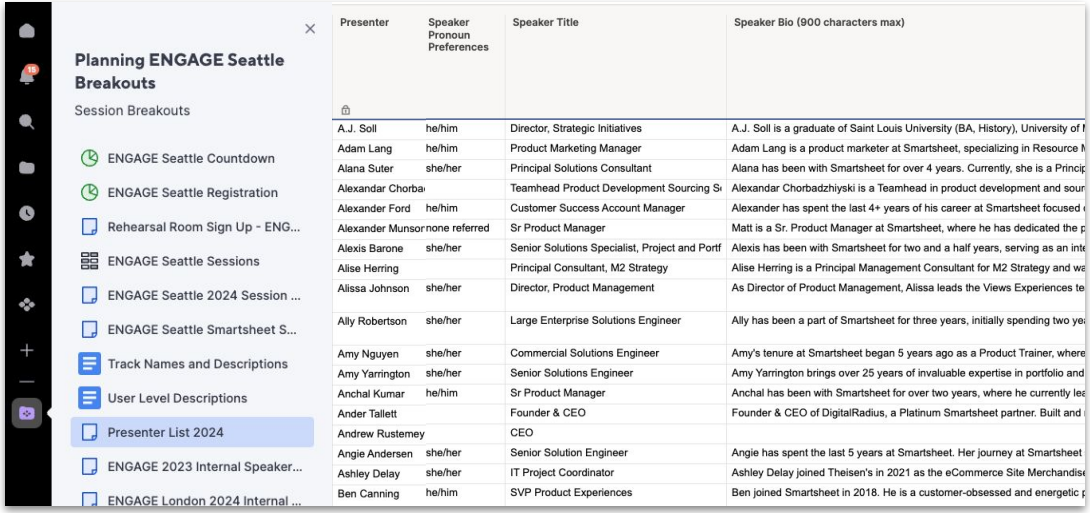
Customize Form

↓

Automate Sending Form

↓

Collect Data



Recap

How to build your first solution in Smartsheet

1. Create

How to get started

2. Connect

How it all works together

3. Customize

How to build it out

4. Collaborate

How to collaborate for success

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Next steps...

- Try it yourself!

- Recommended Sessions:
  - Getting started with dashboards (1pm)
  - Sneak peek: AI-powered evolution of Smartsheet (Wed 1pm)
  - Enhance collaboration with Smartsheet (Wed 2:30pm)

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.

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Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.

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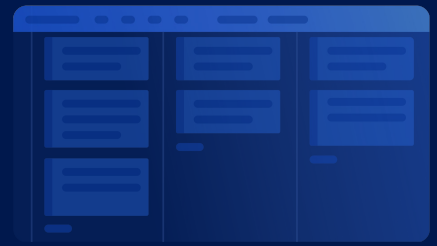

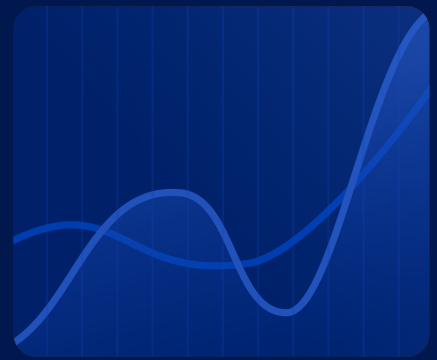

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