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Enhance Collaboration with Smartsheet

SEA29

Brad Powers & Matt Munson

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Today's Speakers

Brad Powers

Commercial Solutions Engineer

Matt Munson

Sr Product Manager

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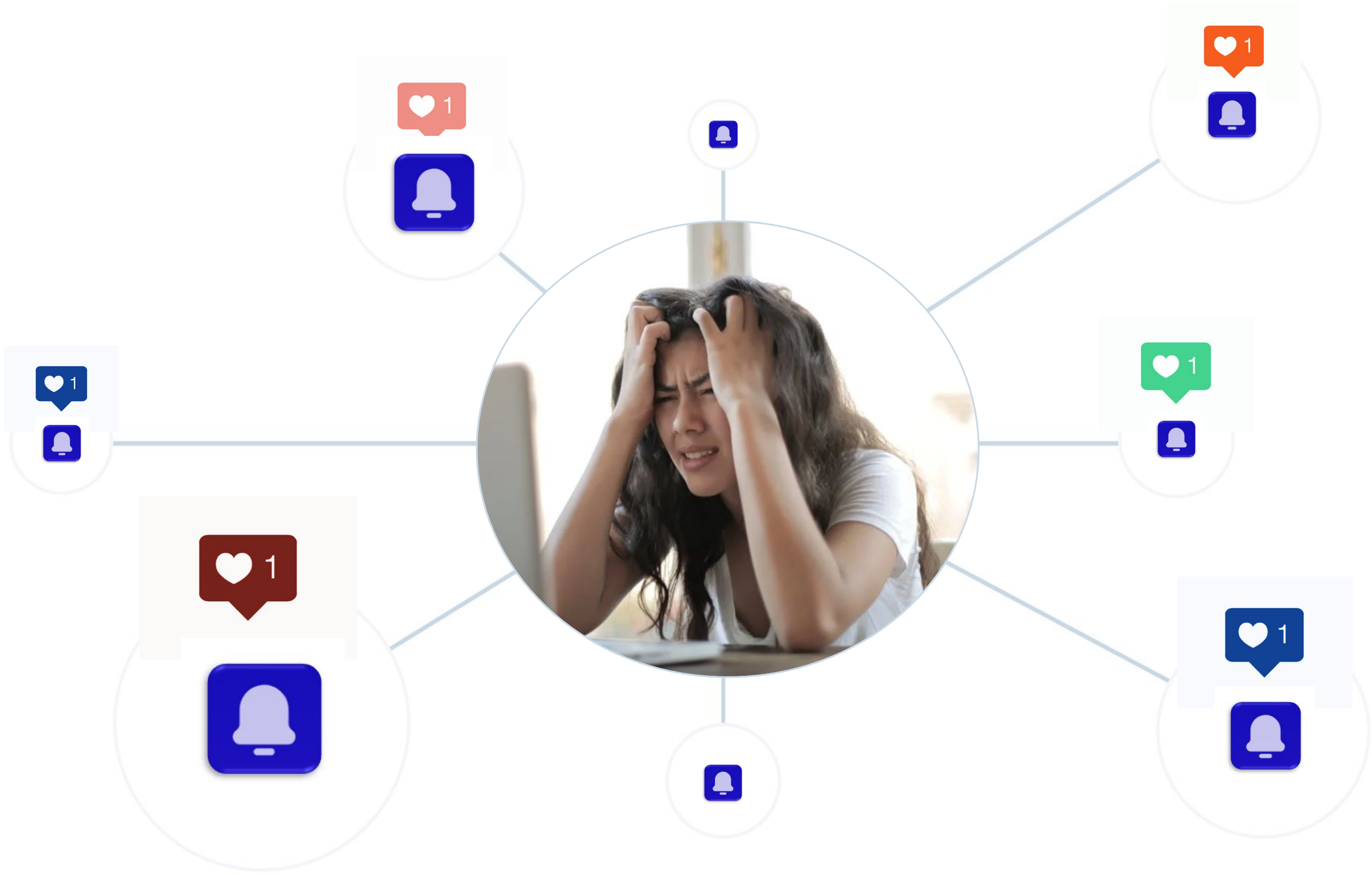

What’s Ahead

1

Maximize Your Collaboration

2

Connect Where Your Team Lives

3

Automate to Enhance Your Collaboration

1

Maximize Your Collaboration

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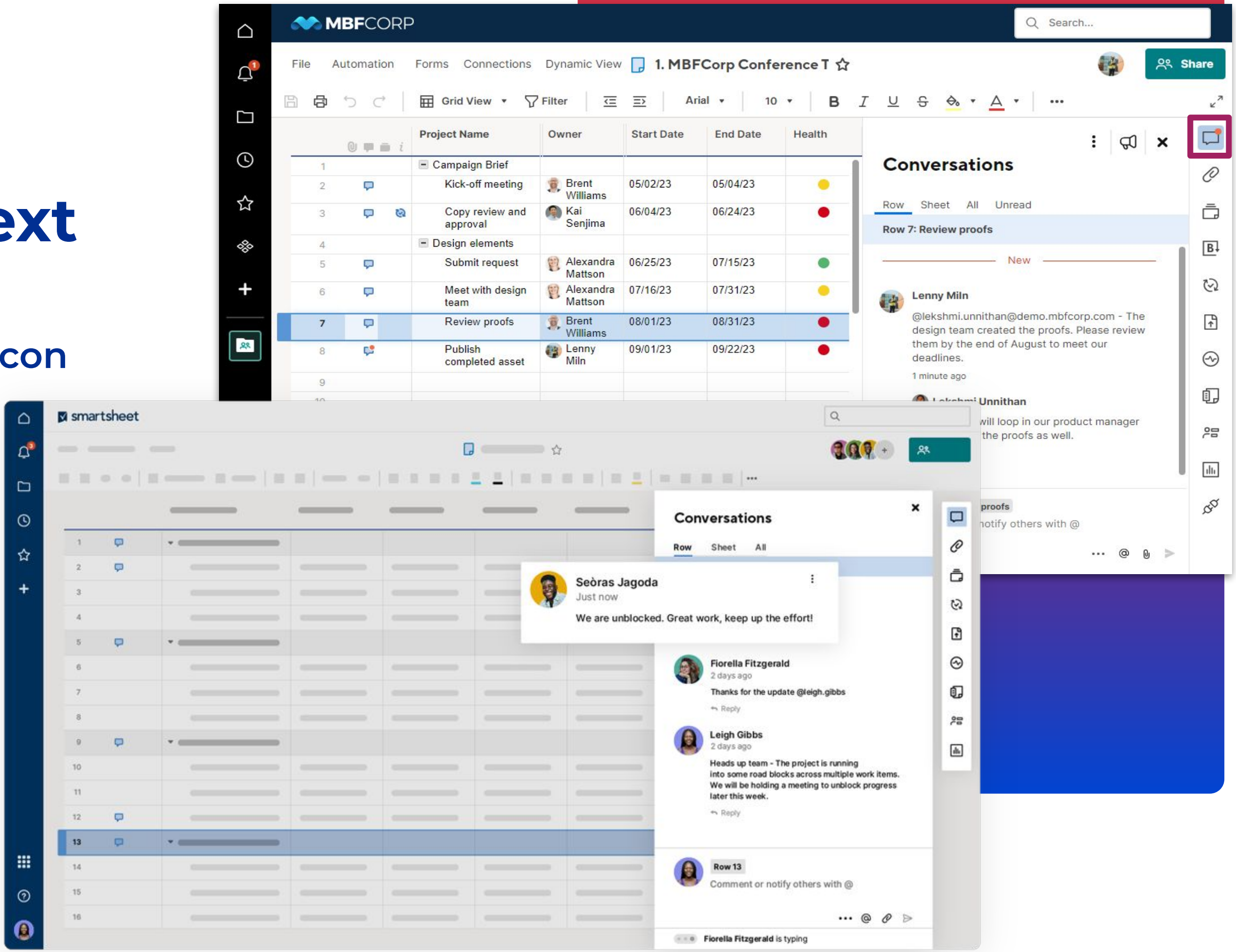
Easily create conversations within the context of your work

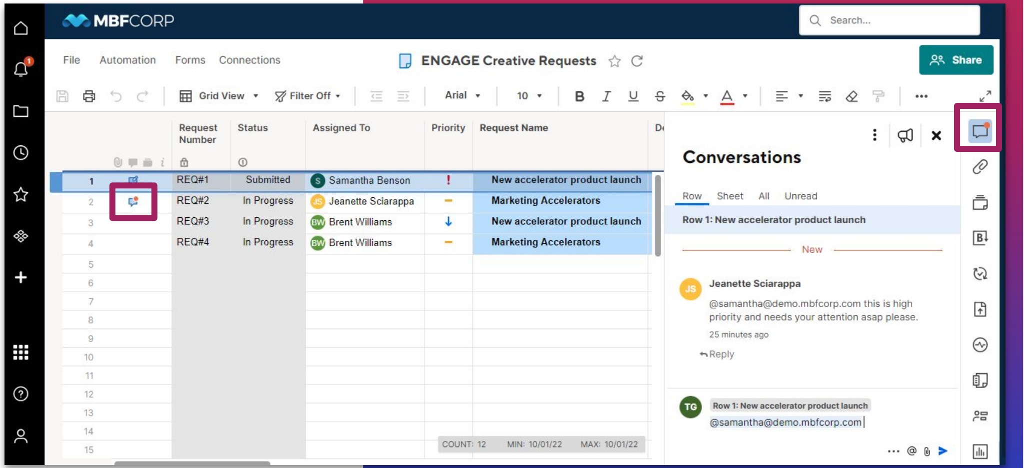
Look for the conversation icon

Create threaded conversations quickly by clicking the conversation icon on any row, or by clicking the conversation icon that appears when you click on any Contact or Latest Comment column cell.



Get alerted to new comments on your sheet or report

Look for the red dot on the conversations icon



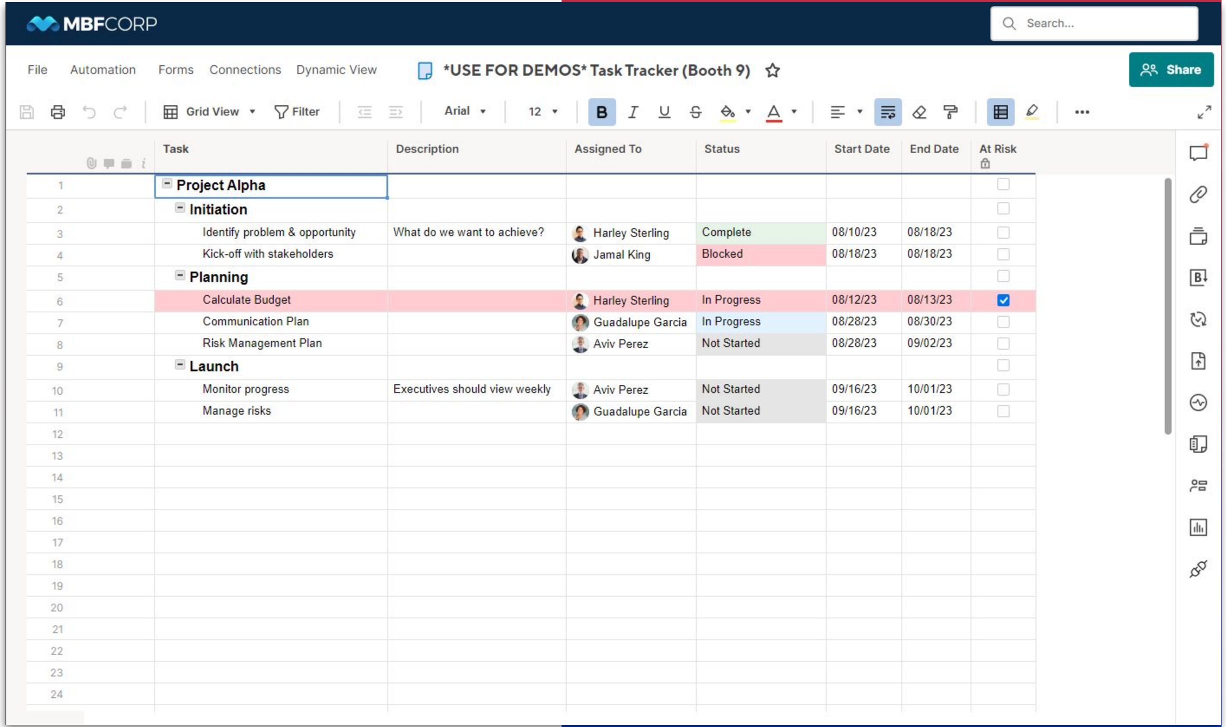
If you see a red dot on the conversations icon in your sheet or report, it means you have new unread comments.

This visual indicator lets you stay on top of any new comments at a glance!

Set up the Latest Comment column

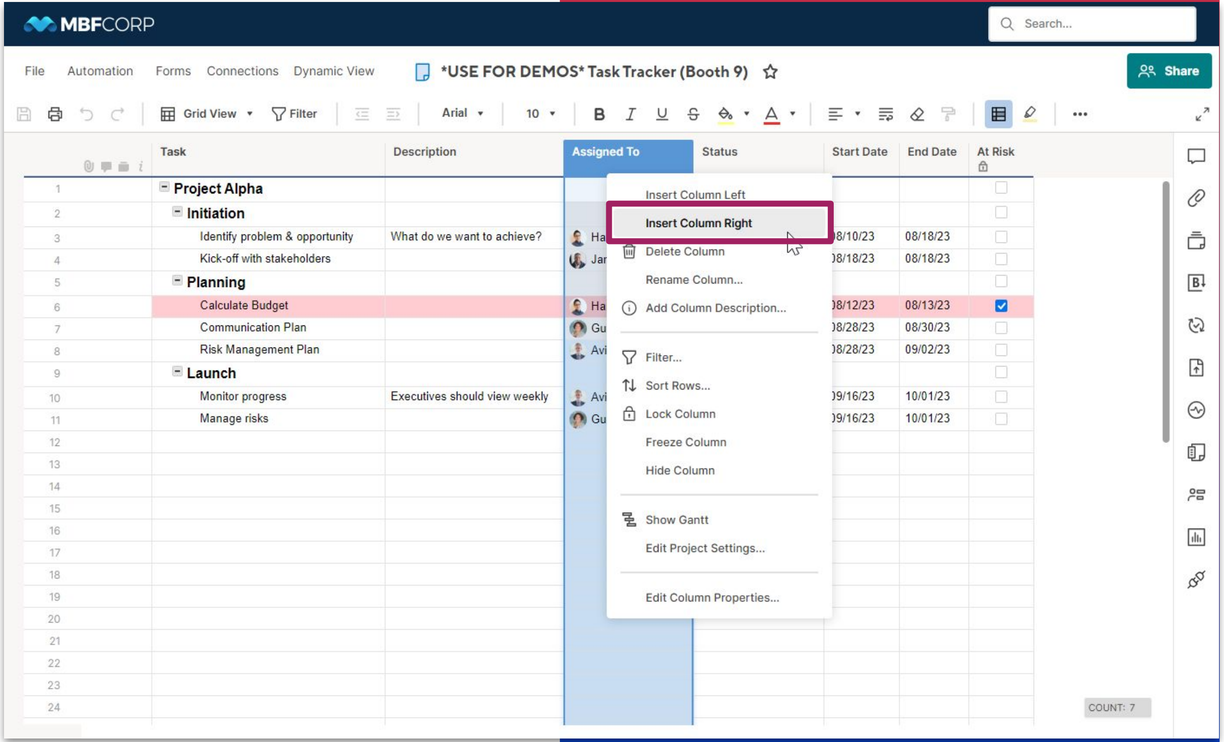
Initial sheet

Set up the Latest Comment column



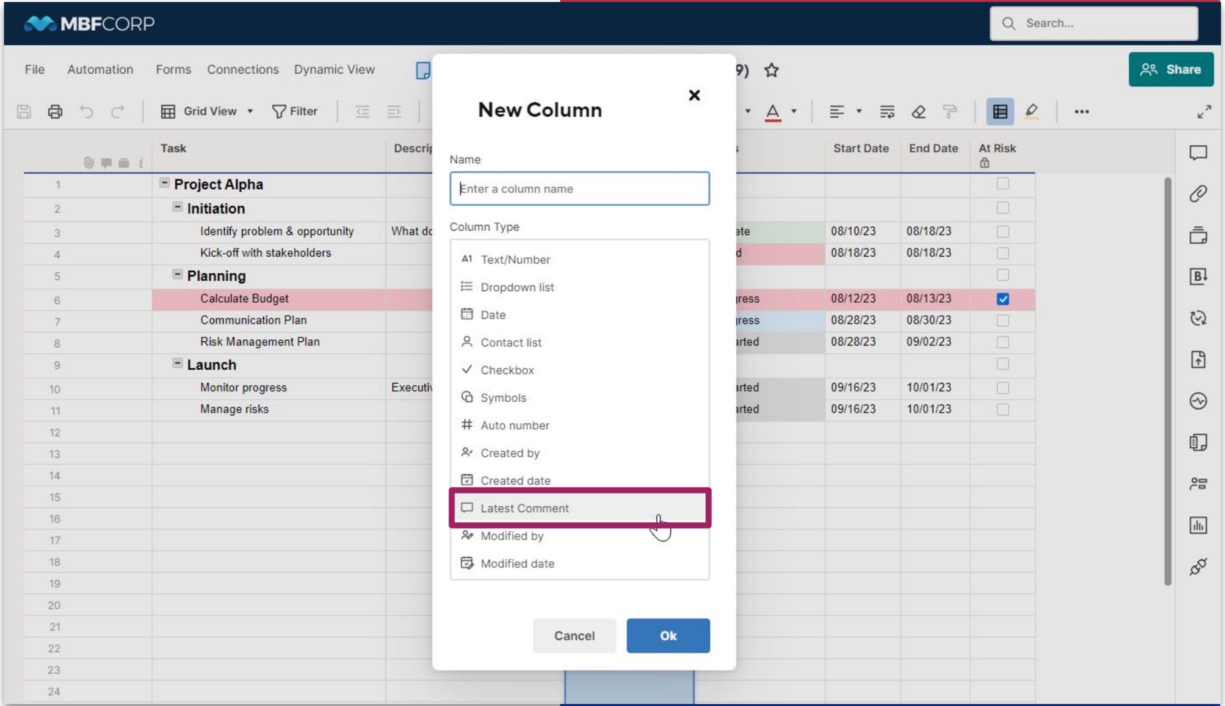
Example configuration

Insert new column



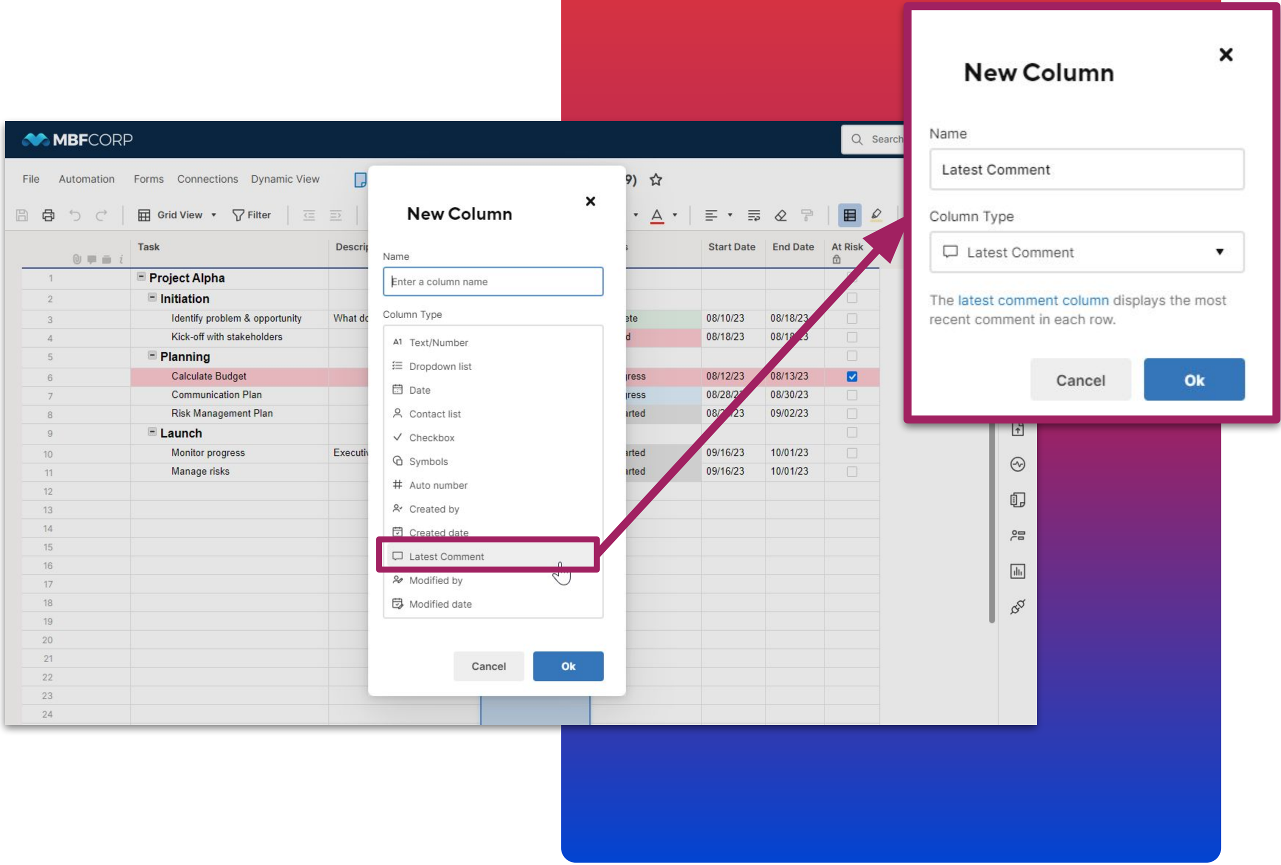
Example configuration

Select ‘Latest Comment’ column type



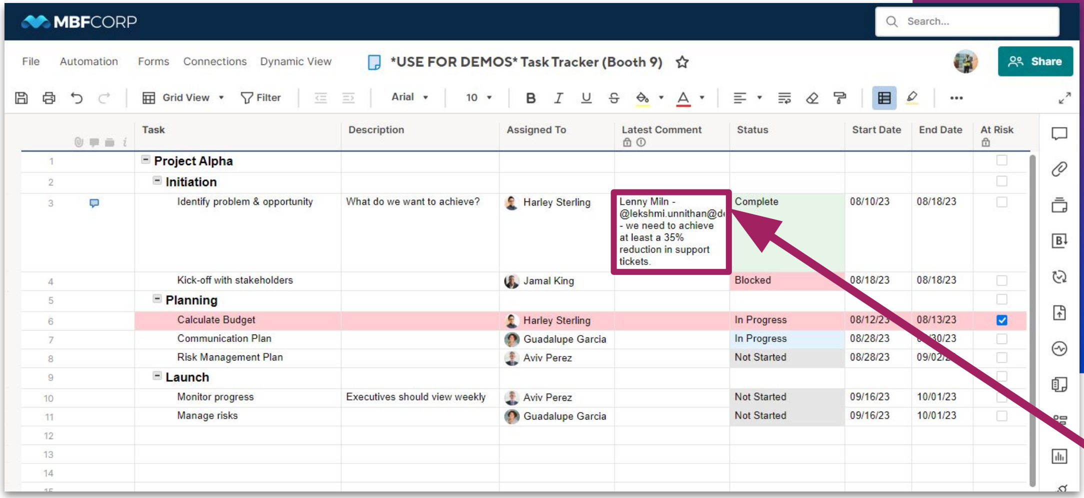
Example configuration

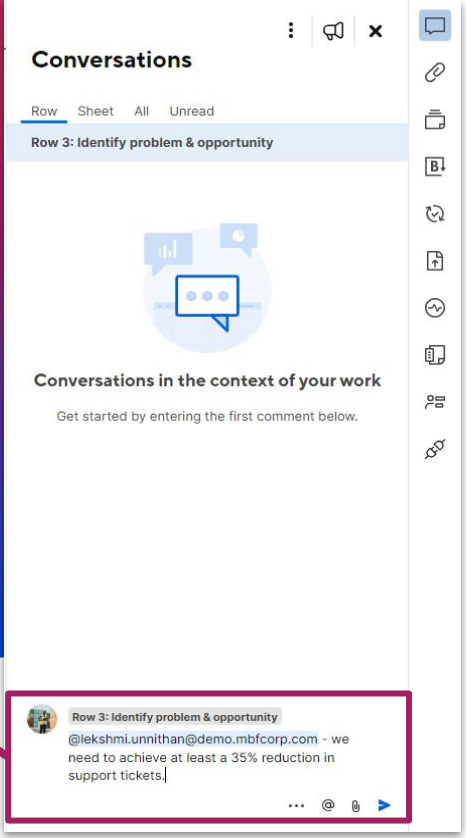
Name the column 'Latest Comment'



Example configuration

Latest comment now appears in column

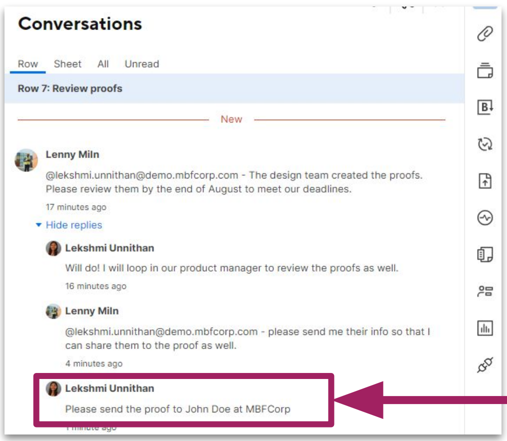


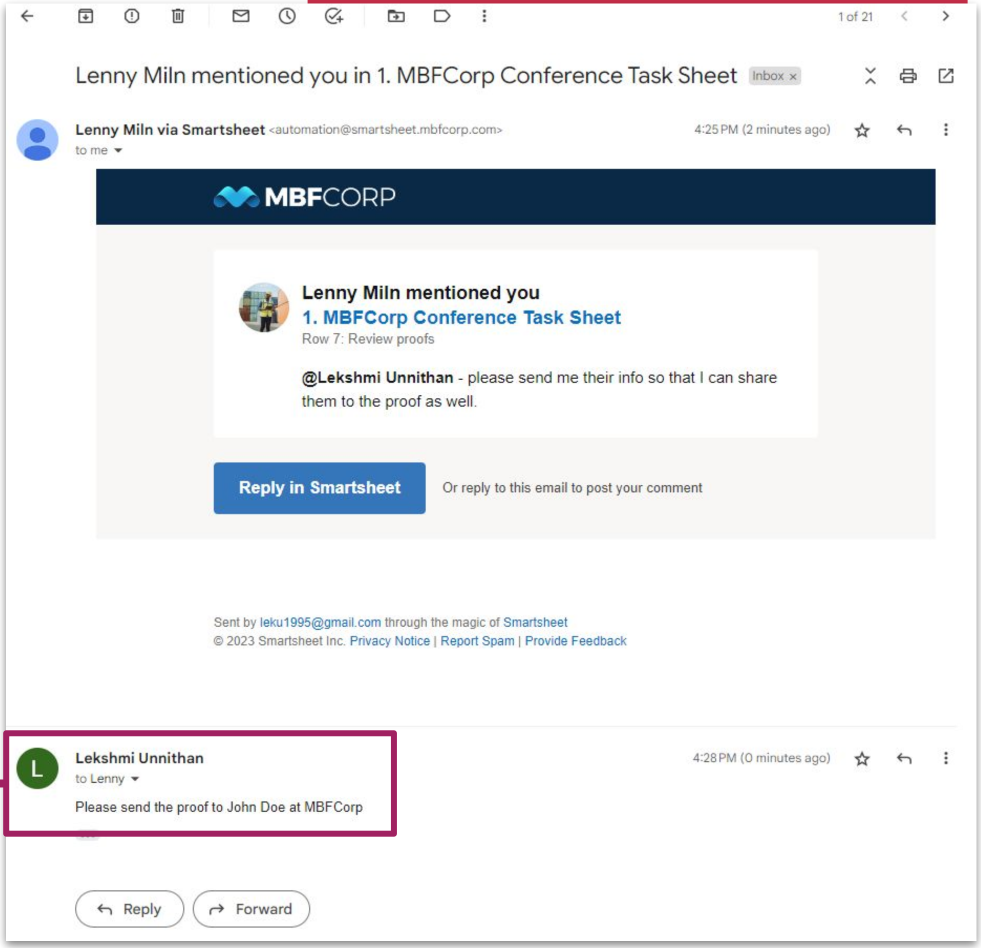


Streamlining user interactions with notifications

Reply directly from email notifications

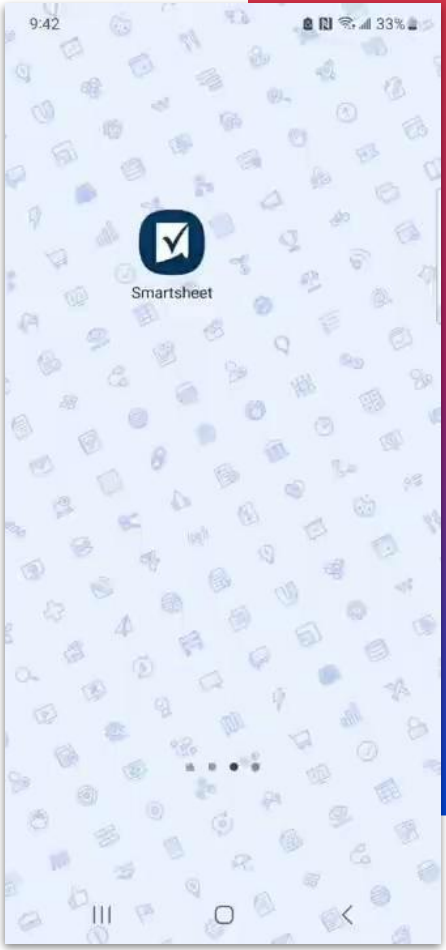
Reply to @mentions directly from your email inbox





Reply directly from mobile push notifications

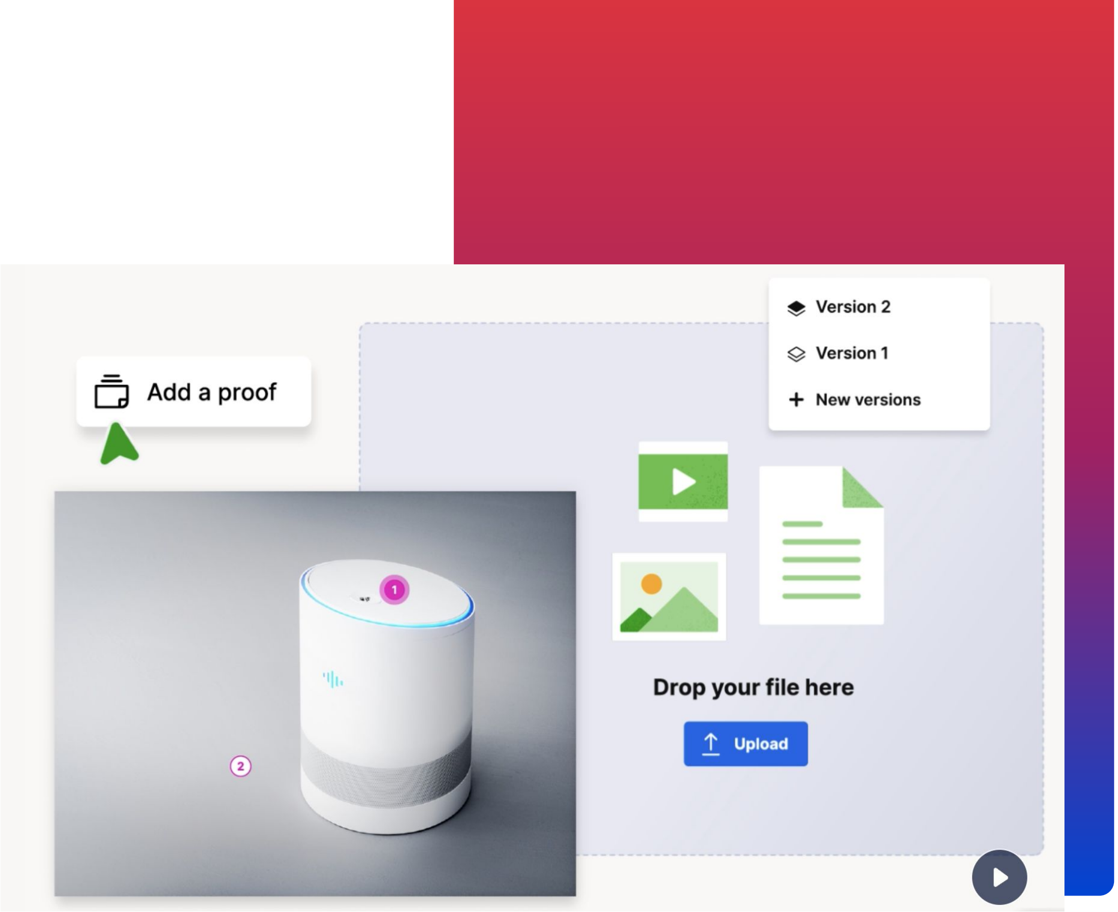
Reply directly to @mentions from your mobile push notification



Proofing

Simplify reviews and keep feedback in one place

Request input from stakeholders, let them pin comments directly on images or documents, and easily track changes and version history for clarity.



2

Connect Where Your Team Lives

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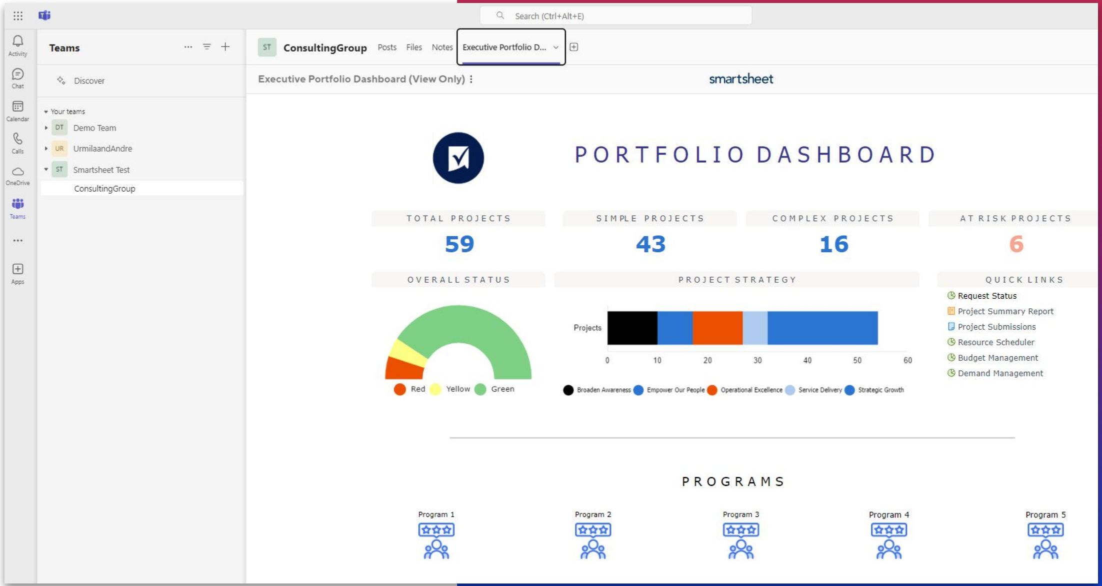
Microsoft Teams integration

Get more work done without leaving Microsoft Teams

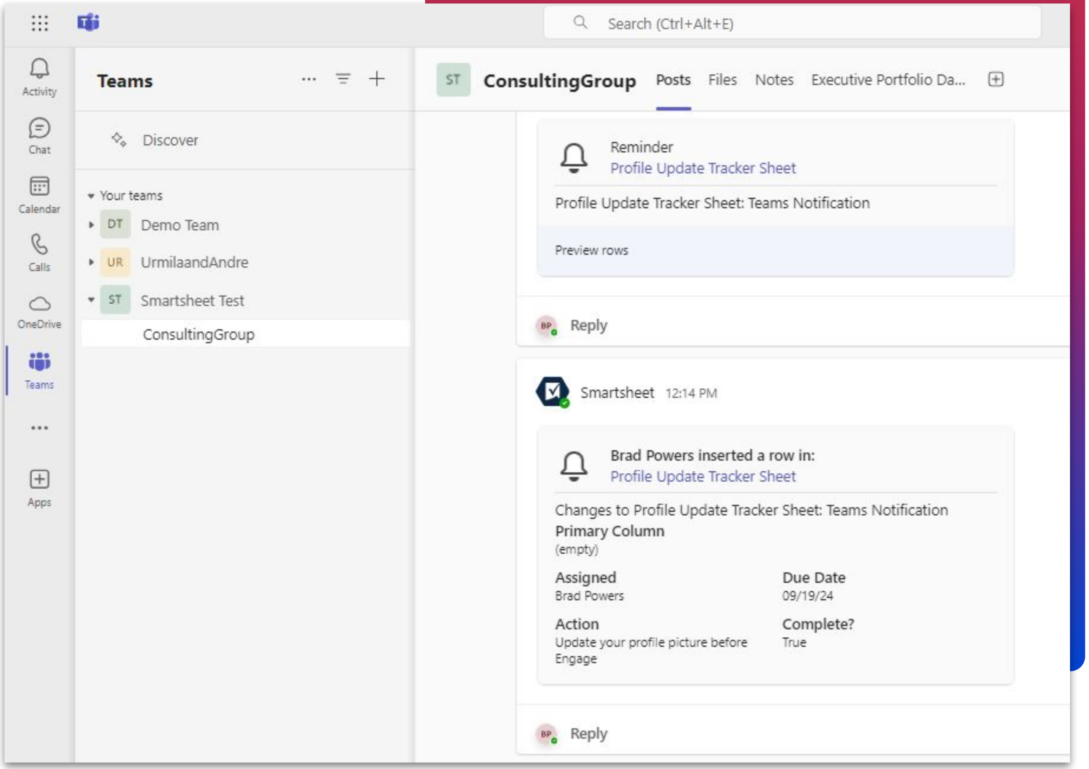
Add Smartsheet sheets, reports, dashboards, and forms as ‘Tabs’ within a Team channel in Microsoft Teams.



Microsoft Teams integration

Stay in the loop with automated DM's

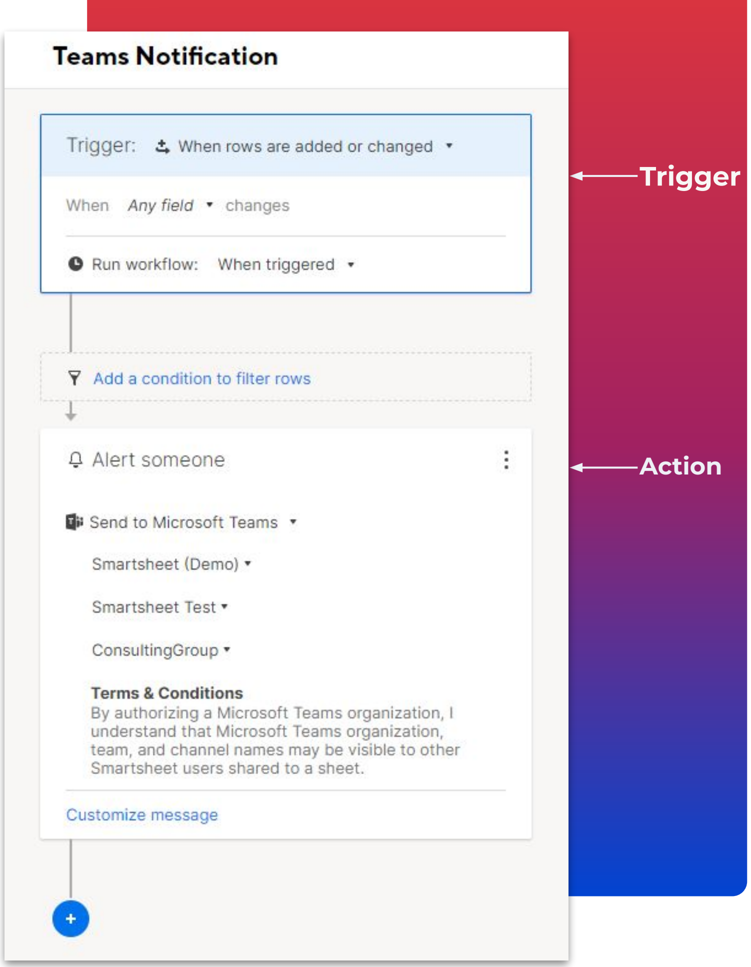
Receive Smartsheet notifications as direct messages, review update and approval requests, and set these notifications to be automatically sent to DM's or Teams channels.



How to send notifications to a Microsoft Teams channel

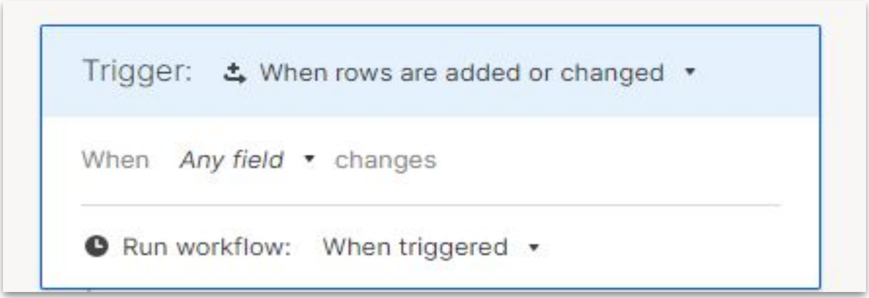
Initial template, fresh out of the box

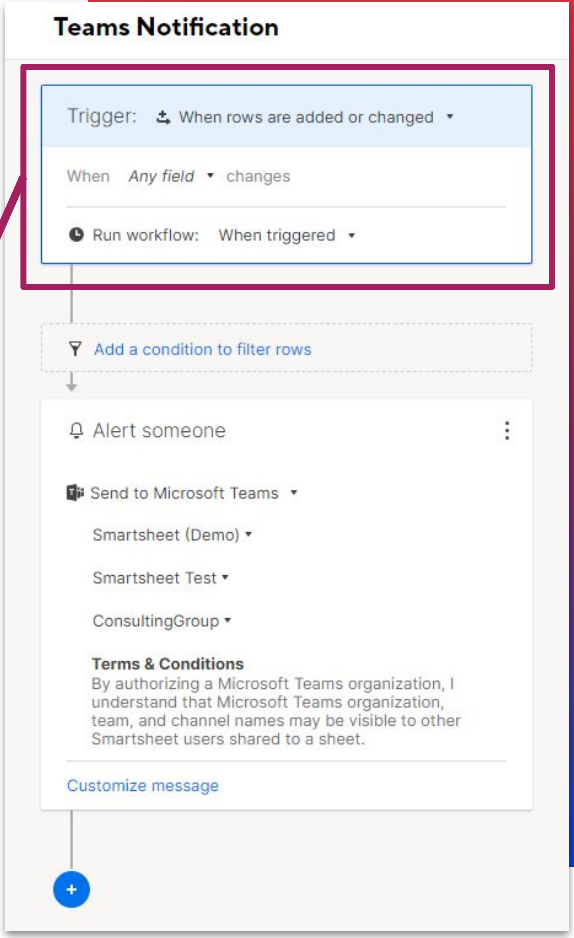
Receive notifications in a Teams channel



Example configuration

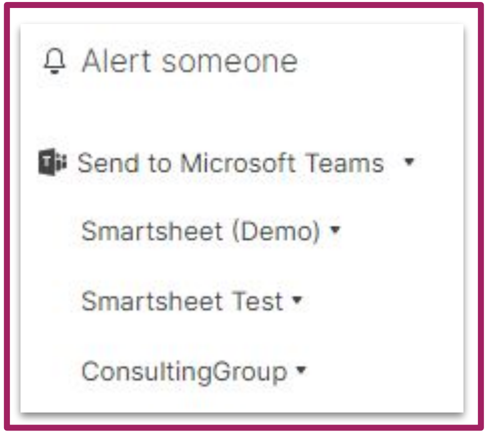
Specify trigger type

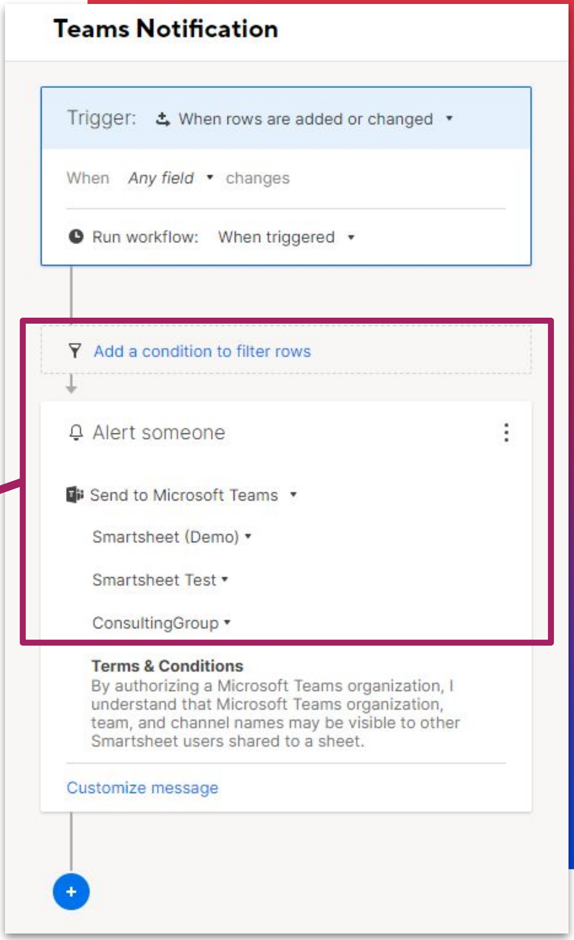




Example configuration

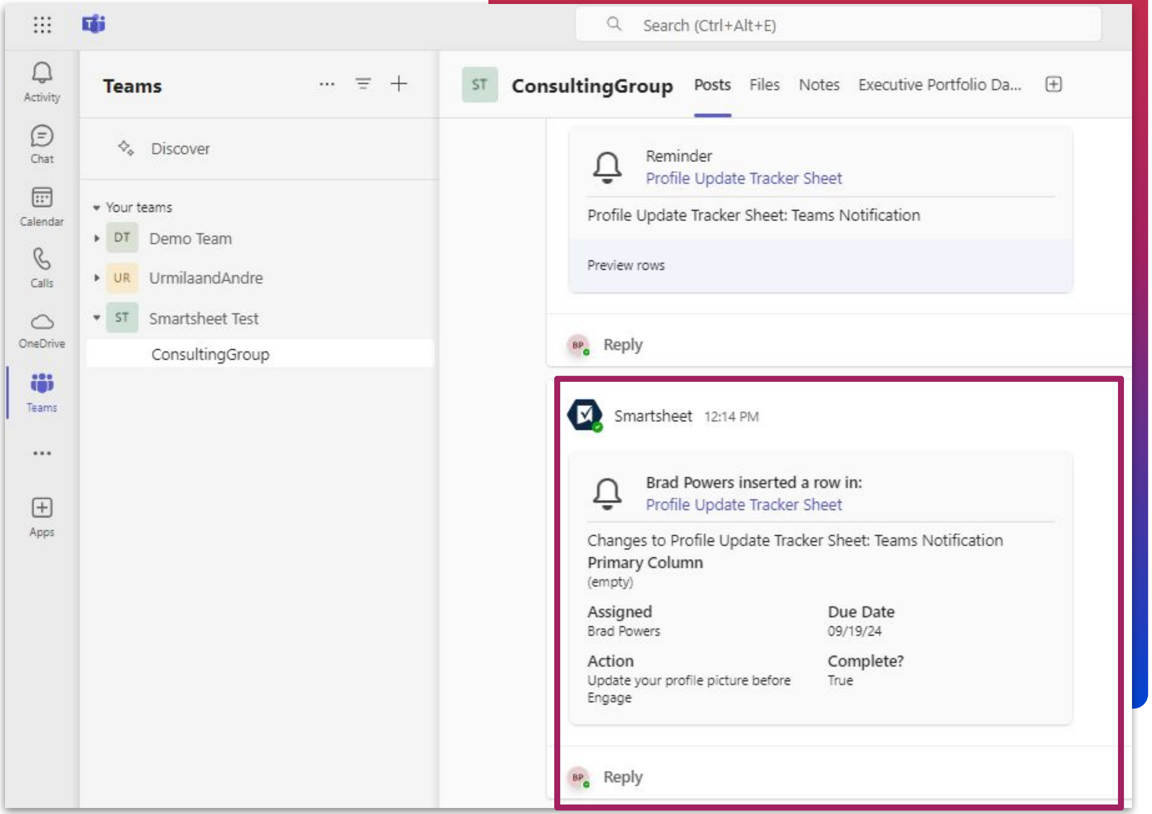
Select Organization, Team, and Channel





Resulting Teams message

Receive notifications in a Team channel



3

Automate to Enhance Your Collaboration

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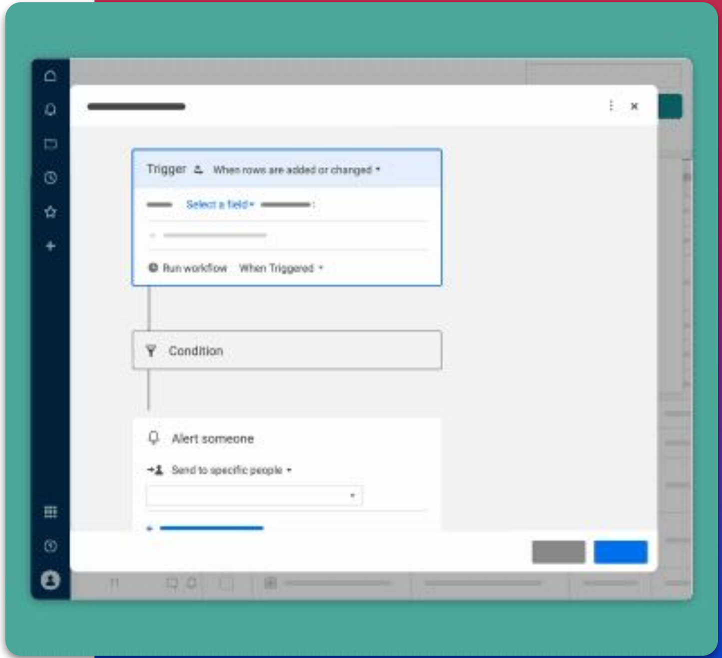
Send an alert

Alert yourself or someone else when specified criteria are met

For example, send yourself a daily alert of all the rows with new comments, or set a personal alert for any tasks at risk.

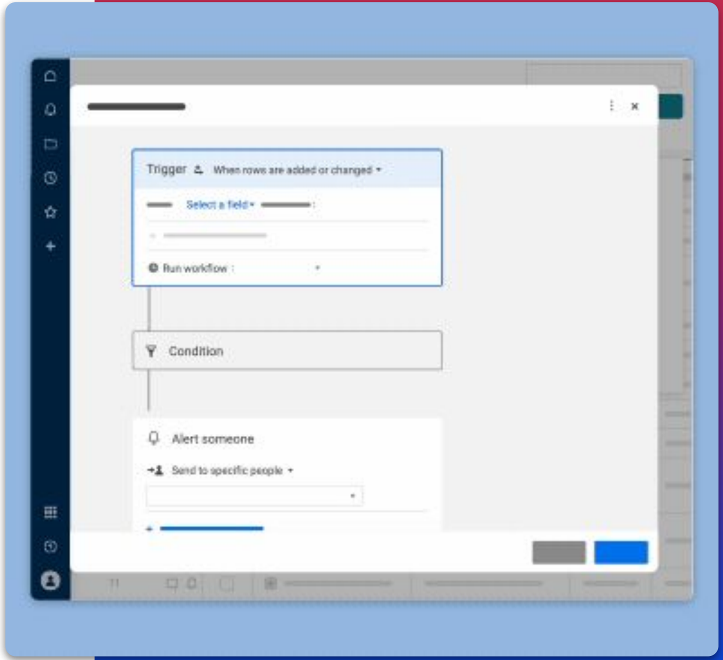
Or keep teammates in the loop when assigning them tasks or changing dates.



Assign people

Assign someone when specified criteria are met

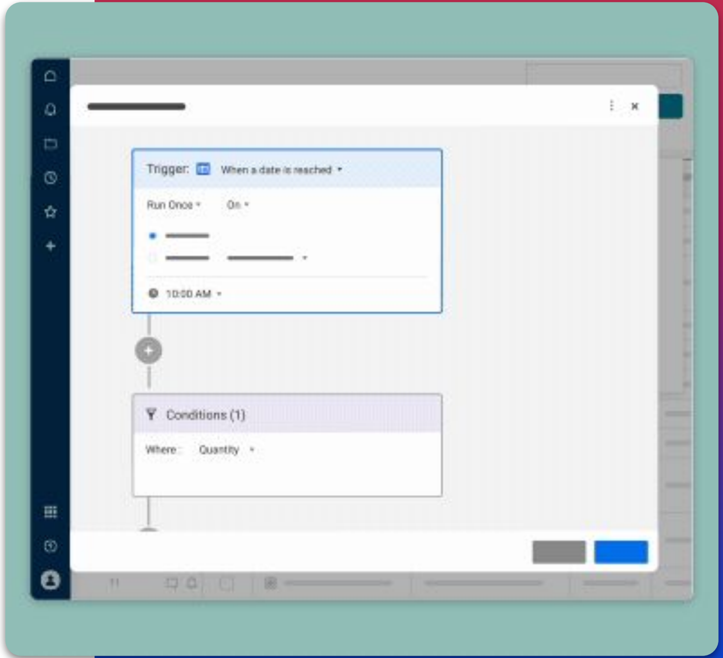
For example, automatically assign a teammate to a task based on criteria, like type of work or department.



Remind someone on a date

Remind someone when a specific date is reached

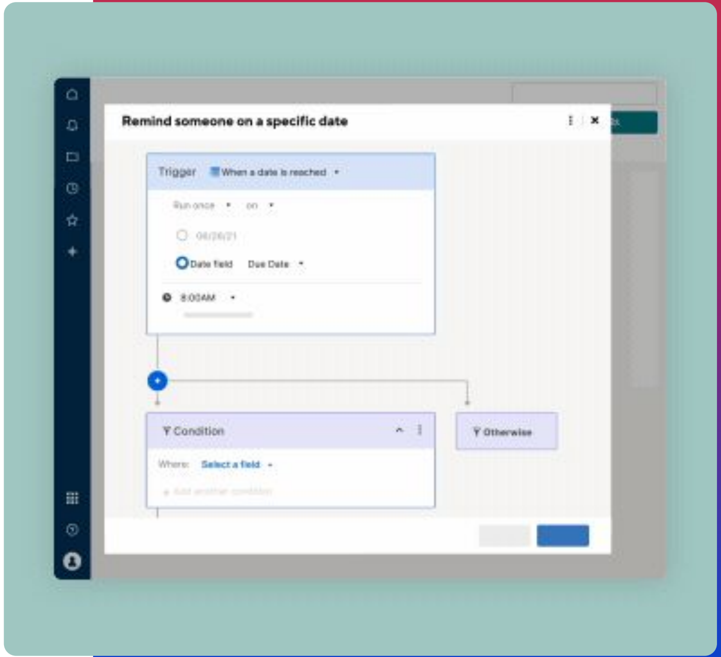
For example, notify someone to review the past year's metrics on the first day of the new year.



Set a date-based reminder

Remind someone when specified date-based criteria are met

For example, notify people when something hasn’t happened by a specific date, such as a project not marked as complete by its target due date.

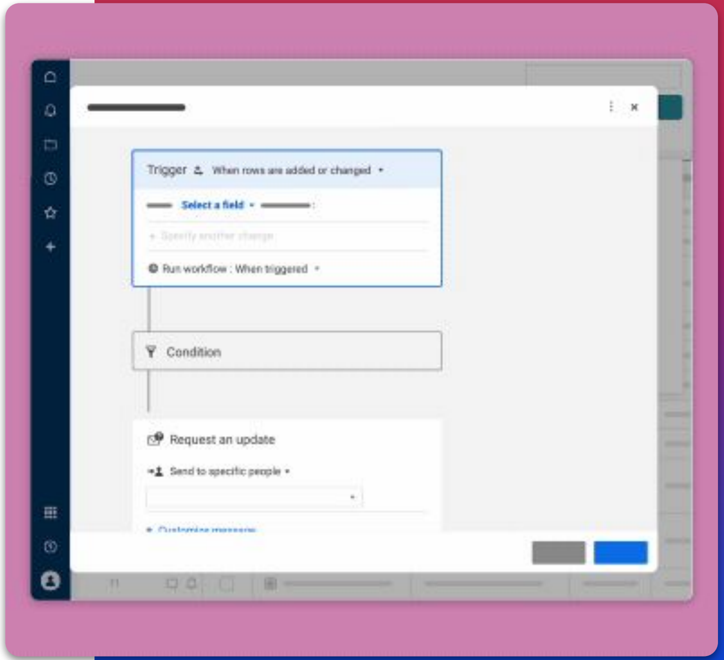


Request an update

Request an update from a contact when specified criteria are met

For example, gather information about a project or request from a stakeholder — e.g. sheet fields that weren't updated when a new row was added.

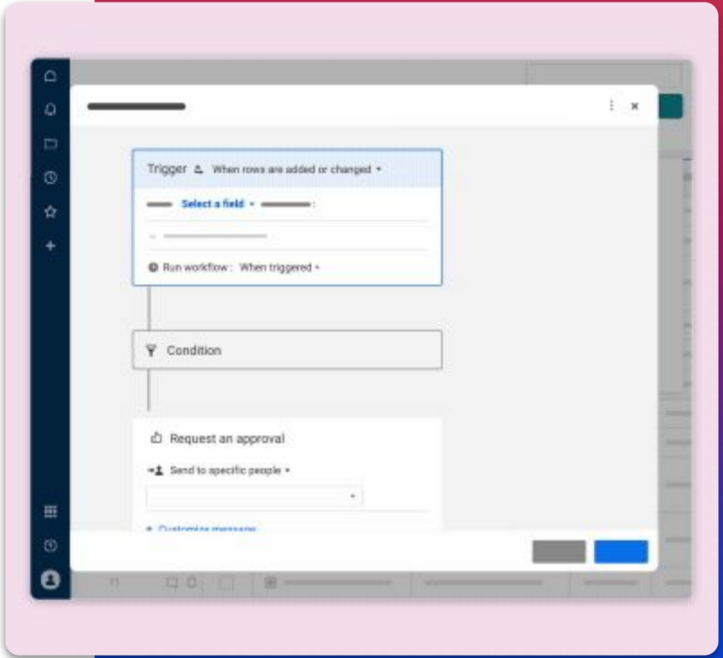
Or send recurring requests to create weekly status reports or check monthly project health.



Request an approval

Request from one or more contacts when specified criteria are met

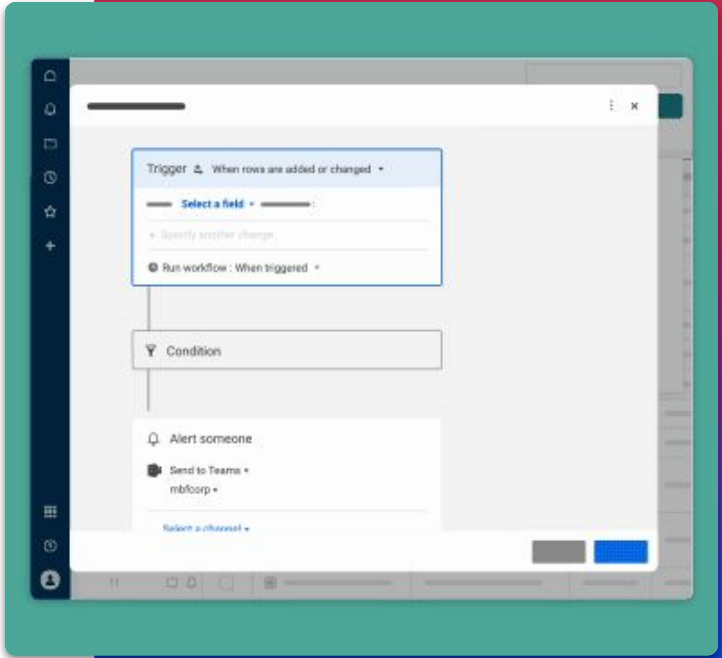
For example, have a manager approve additional resources when timelines are slipping.



Send to Microsoft Teams

Alert a Teams channel when specified criteria are met

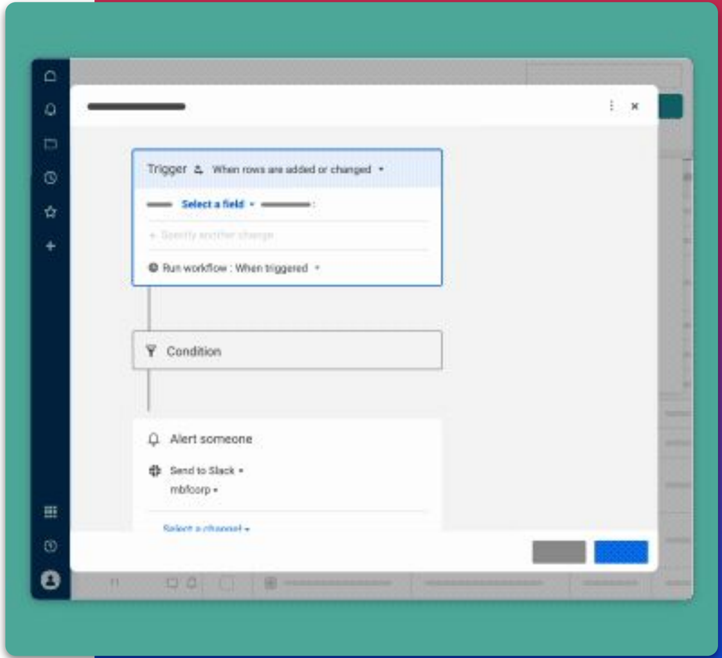
For example, let your team know when a new row is added to a project intake sheet.



Send to Slack

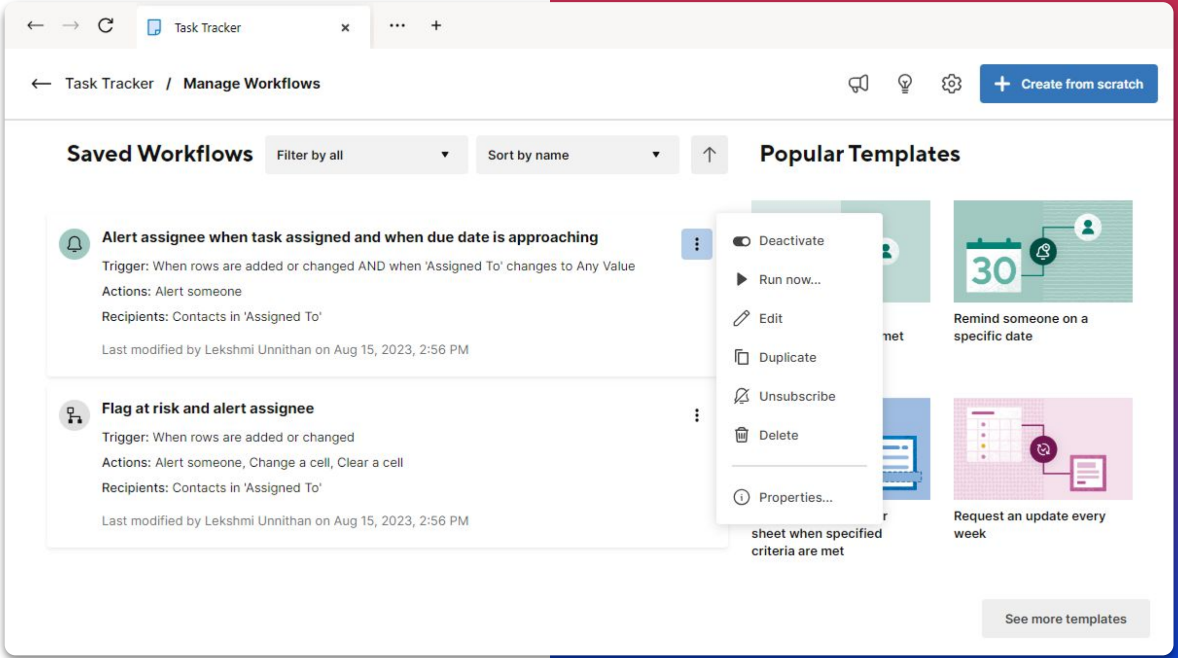
Alert a channel when criteria are met

For example, post in an internal Slack channel when a status changes, a comment is added, or an attachment is updated.



Manage your automated workflows

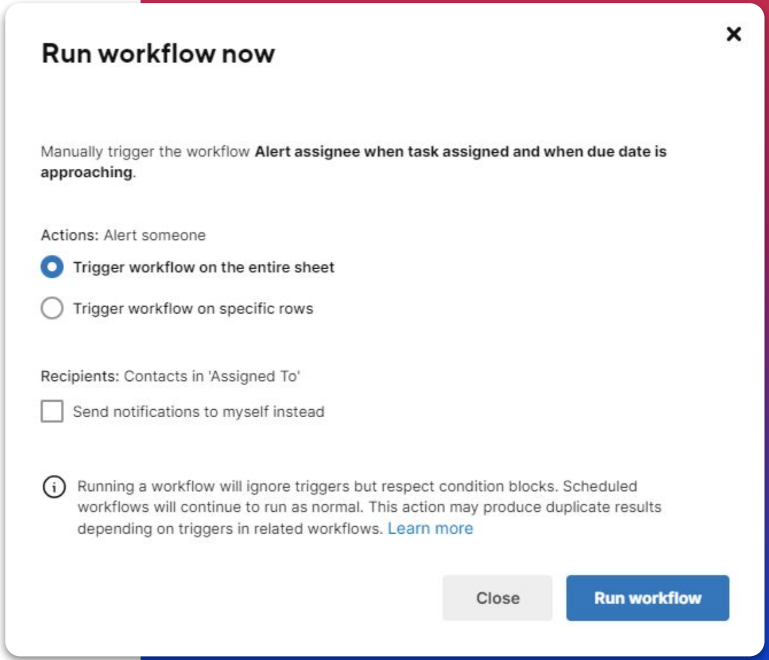
Add, view, test, and adjust



Run workflow now

Run on specific rows and choose to send the notification to yourself

- *Run workflow now* allows users to manually trigger a workflow, bypassing the trigger conditions, but honoring any conditional blocks.
- Users can choose to send notifications to the recipients specified by the workflow or to themselves instead.
- Users can run the workflow on the entire sheet or only on specific rows.

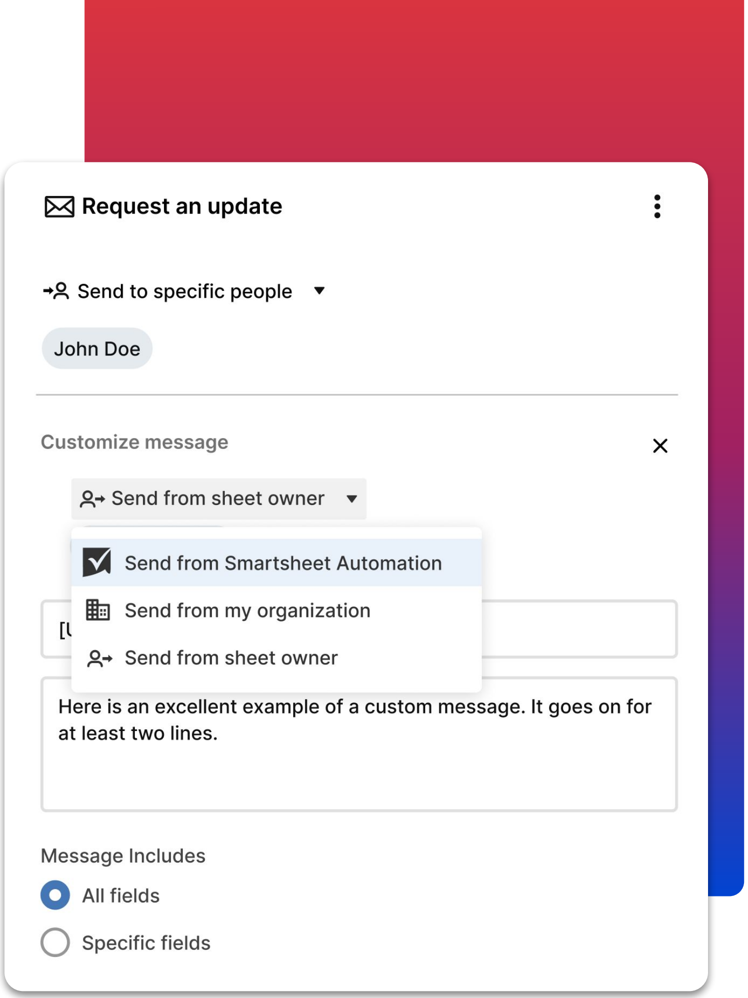


Customize from name

Workflow builders can set the 'from name'

- *Send from Smartsheet Automation*
- *Send from my organization**
- *Send from triggering user* (for alerts) or *Send from sheet owner* (for requests)

*Please note: The Send from my organization option is only available for customers on Enterprise plans and above.



Recap

1

Maximize Your
Collaboration

2

Connect Where Your
Team Lives

3

Automate to Enhance
Your Collaboration

Next steps...

- Stop by the Collaboration booth with any last minute questions or feedback
- Automate and manage your multi-step processes with Dynamic View 4:00 - 5:00 PM
- Attendee Party 5:00 - 7:00 PM
- Implement something new you learned today when you return home!

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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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

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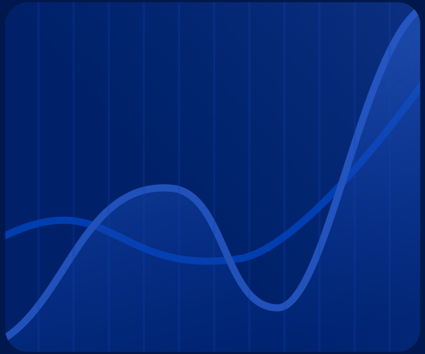

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Thank you for attending!

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Have product feedback?

Let us know!

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Register for upcoming User

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