

Claude with Smartsheet

Welcome to Private Beta!

This Private Beta is a by-invitation only version of our new Claude Integration.

We understand how busy our customers are, so we appreciate you taking the time to beta-test the **Smartsheet Integration with Claude**. Your feedback will make a real difference as we continue to develop this feature and prepare for its release.

In the following pages, you'll find an FAQ to help you get started. If you have additional questions in the coming days, please reach out to us at privatebeta@smartsheet.com.

NOTES

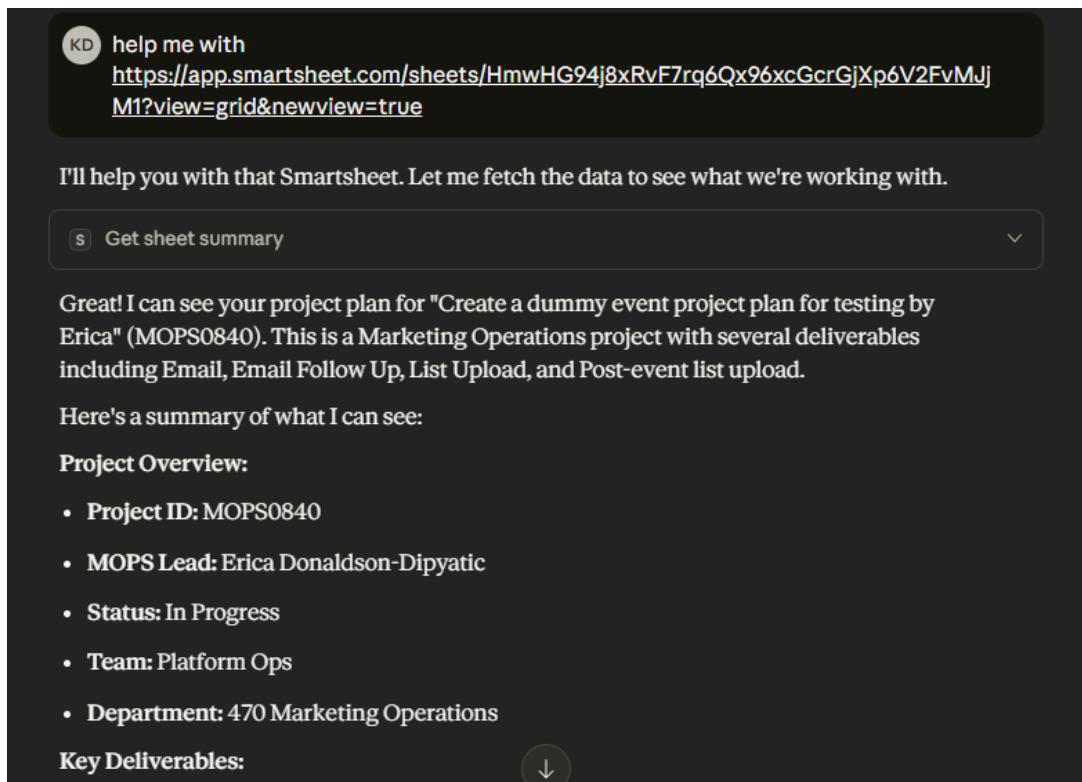
- As this is a Private Beta, the program and its features constitute Smartsheet's Confidential Information under the Services Agreement between you and Smartsheet. We ask that you do not share this guide beyond those actively involved in the beta testing.
- You may submit your feedback to us via this [feedback form URL](#)

Private Beta

What is the new Smartsheet Integration with Claude experience?

Smartsheet users can now link their accounts to Claude to generate natural-language summaries and take actions on individual sheets. Claude securely accesses live sheet data, including task progress, overdue items, and key risks to support core summarization and navigation use cases. These insights are surfaced directly within the Claude interface as a concise, easy-to-digest summary. The Claude integration can also take action on your sheets to update statuses, dates, and risks based on your input.

This capability enables customers to quickly understand project status and take actions from within a central user interface without navigating multiple sheets.



KD help me with
<https://app.smartsheet.com/sheets/HmwHG94j8xRvF7rq6Qx96xcGcrGjXp6V2FvMJjM1?view=grid&newview=true>

I'll help you with that Smartsheet. Let me fetch the data to see what we're working with.

Get sheet summary

Great! I can see your project plan for "Create a dummy event project plan for testing by Erica" (MOPS0840). This is a Marketing Operations project with several deliverables including Email, Email Follow Up, List Upload, and Post-event list upload.

Here's a summary of what I can see:

Project Overview:

- **Project ID:** MOPS0840
- **MOPS Lead:** Erica Donaldson-Dipyatic
- **Status:** In Progress
- **Team:** Platform Ops
- **Department:** 470 Marketing Operations

Key Deliverables:

Private Beta Structure

The private beta is expected to last for approximately 3 weeks. However you are welcome to continue testing out functionality and provide feedback beyond this time and also as part of Smartsheet's Early Adopter Program (EAP) once launched.

We will do a mix of form based and video feedback sessions with Beta users.

Private Beta Logistics

What are the pre-requisites for being able to use this integration?

We are asking that our Beta Testers have the following:

- A license on a Business or Enterprise Smartsheet account (which includes ability to generate an API key within your Smartsheet instance)
- A Pro, Team or Enterprise account with Claude.
- Have access to non-production sample or test sheets approved for AI access and updates; or are open to AI accessing live production data on Smartsheet US region.

Who will I be working with at Smartsheet?

You will provide feedback through a form we send to you. All feedback will be reviewed by Sinduja Muralidharan, the PM for this integration, and other key members of the Product, Engineering, and PMM teams. We will use your feedback to enhance the Smartsheet integration with Claude experience as well as to address bugs and customer needs.

What is my expected commitment to private beta testing?

We ask that you test and use Smartsheet's MCP integration with Claude for up to 30 minutes per week. Please provide feedback via the form we provide. We will also be booking sessions via Zoom to discuss your feedback.

What will happen to the Smartsheet integration with Claude at the end of the beta period?

When the beta period concludes, we will open this up for more customers via the Early Adoption Program before making this Generally Available (GA).

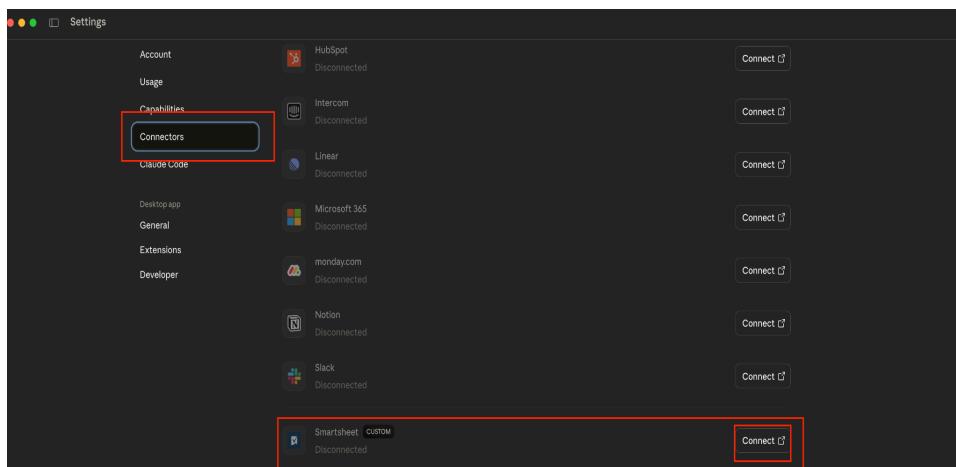
Getting Started

How do I access the Beta?

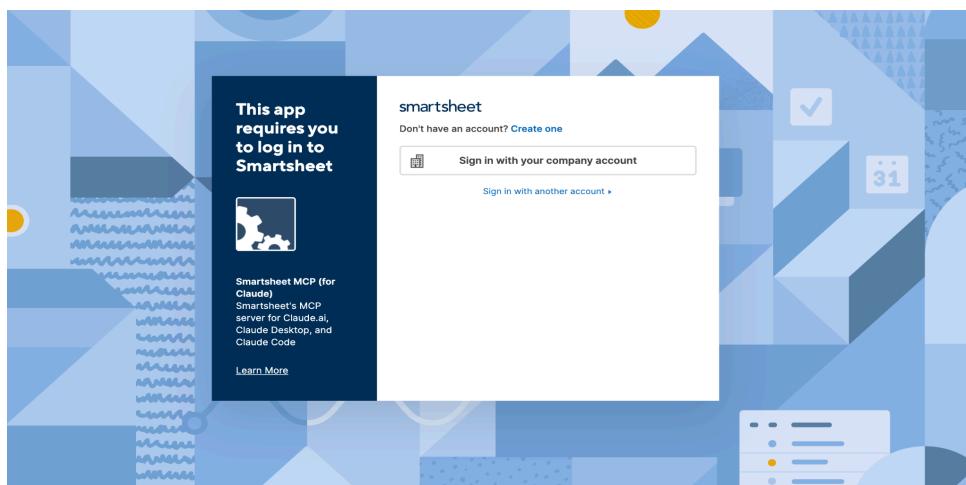
The integration is only available on Claude either via the Browser or Desktop. To use connectors, an Owner must first enable them for the organization for members of Claude Team and Enterprise plans. Instructions for Admins can be found [here](#)

Step 1: Go to `Settings` in Claude

Step 2: Click on 'Connectors'. Then, scroll or search the connectors list and click on "Connect" to the Smartsheet connector.



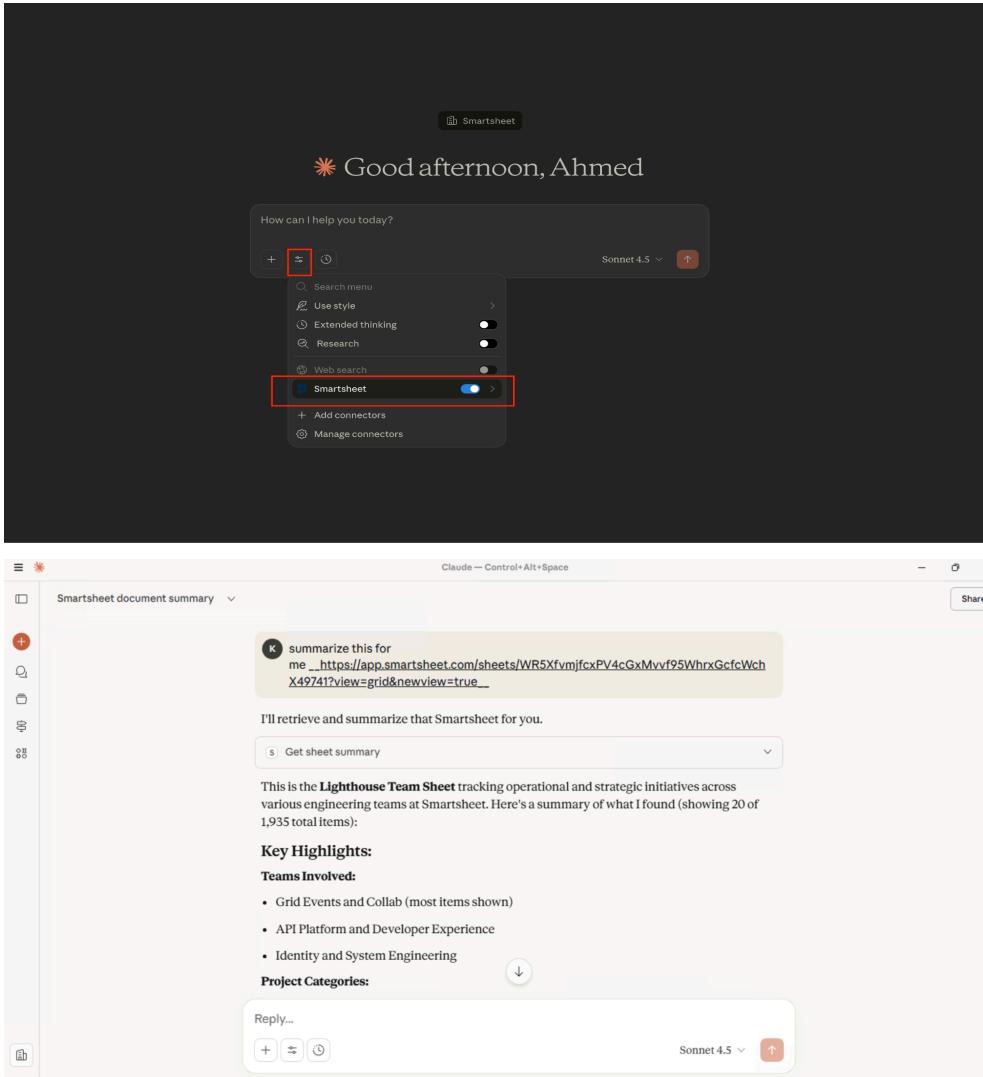
Step 3: A browser tab will be opened. Log in with your Smartsheet credentials



Step 4: Click on “Allow” after successful logging

Step 5: Now, you should be successfully connected to the MCP server of Smartsheet. The ‘Configure’ button and url of the server should be visible.

Step 6: You can start a new chat - just make sure to have the Connector enabled in the chat as well



Using the Smartsheet integration with Claude

What functionality is supported by this integration?

- Discovery & Search:

- Find sheets, reports, dashboards, folders, and workspaces by name and using their URLs
- Browse available workspaces and folders and explore file structure
- Retrieve sheet data with filtering, sorting, and column selection
- Sheet Management:
 - Create new sheets
- Row Operations:
 - Add new rows
 - Modify existing rows
 - Remove rows (max 10 at once)
- Column Operations:
 - View column metadata and properties
 - Create new columns
 - Modify column properties
 - Remove columns

On which Smartsheet regions is this available?

The Claude integration is currently limited to US instances of Smartsheet. Support for EU and AU instances is planned and under development. There are no plans to support the Gov instances at this time.

How do I troubleshoot errors in the setup ?

Please contact **Sinduja Muralidharan**(PM for the feature) for any troubleshooting but please use the [feedback form](#) to log potential bugs.

Planned Enhancements

The following features are not yet available.

- Support other assets such as Discussions, Proofs, Reports, Dashboards, Automated Workflows etc.
- Support for sheet and activity history and formulas
- Access to Premium features (ex: Pivot, Dynamic View, Data Shuttle etc.)
- Support for other LLMs such as ChatGPT or Microsoft Copilot