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Welcome to ENGAGE’20!

1. Explore conditional logic with forms.
2. Learn to manage multi-step processes with Dynamic View.
3. Find out how to manage vendors using forms and Dynamic View in a product demo.
Forms and conditional logic
Forms

Easily collect and act on information quickly

“When you ask the right questions to the right people, you’ll make it easier for colleagues, customers, and other stakeholders to provide the high quality data that your team needs to successfully operate with speed.”
Forms with conditional logic

Use a single form to ask different questions to different respondents based on their answers for:

- Requests for proposal submissions
- Ticketing requests
- Remote issue tracking
- Event management
- Sales and marketing requests
Dynamic View
Dynamic View
Manage multi-step processes by sharing only what is needed to the right people at the right time for viewing or editing.

Simplified views
Simplify and accelerate collaboration by emphasizing only critical, relevant information.

Data access governance
Protect sensitive information with identity or condition based access control.

In-context guidance
Lead users through multi-step process with guidance and guardrails.
Scenarios for Dynamic View

Dynamic View business process and data management use cases

**VENDOR MANAGEMENT**
Supply / Procurement
VP of Finance, Accounting, Supply Chain

**CONTRACT MANAGEMENT**
Supply / Procurement
VP of Legal, Procurement

**PERFORMANCE REVIEWS**
Human Resources
VP of Human Resources

**REVENUE FORECASTING**
Sales / Services
VP of Sales

**ORDER MANAGEMENT**
Customer Service
VP of Customer Service

**SALES ACTIVATION MANAGEMENT**
Professional Services
VP of Sales

**CREATIVE SERVICES TICKETING**
Marketing, Product
VP of Marketing

**BI / IT TICKET MANAGEMENT**
Information Technology
CIO, Director IT
Product Demo
Vendor program management and RFPs
Vendor management

**Process Owner**
- Design Process

**Program Lead**
- Strategic Initiatives
- Receive requirements
- Send RFP
- Review Proposals
- Review and Signoff
- Send Approval Updates

**Program team**
- Receive RFP
- Submit Proposal
- Monitor Outcome

**Vendor(s)**
In closing...

1. Learn more about forms in our intermediate learning track.
2. Dig into the ENGAGE Brain Boost for Dynamic View.
3. Start managing multi-step processes with Dynamic View today. Contact our team to learn more about using Dynamic View to solve process-based workflows.
4. Join the ‘Smartsheet for Dynamic Work’ community group. Share ideas and collaborate with fellow professionals who are using Smartsheet.
Thank you