



smartsheet

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Connect Your Tech Ecosystem to Knock Down Information Silos

Bob Fraser
Senior Product Manager
Smartsheet

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Q&A

Welcome!

1. Overview of Smartsheet Connectors and some game changing use cases.
2. Overview of our premium product, Data Uploader, and different ways to use it.
3. Different ways you can use these two together to supercharge your own Smartsheet solutions.



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How companies bring information together today

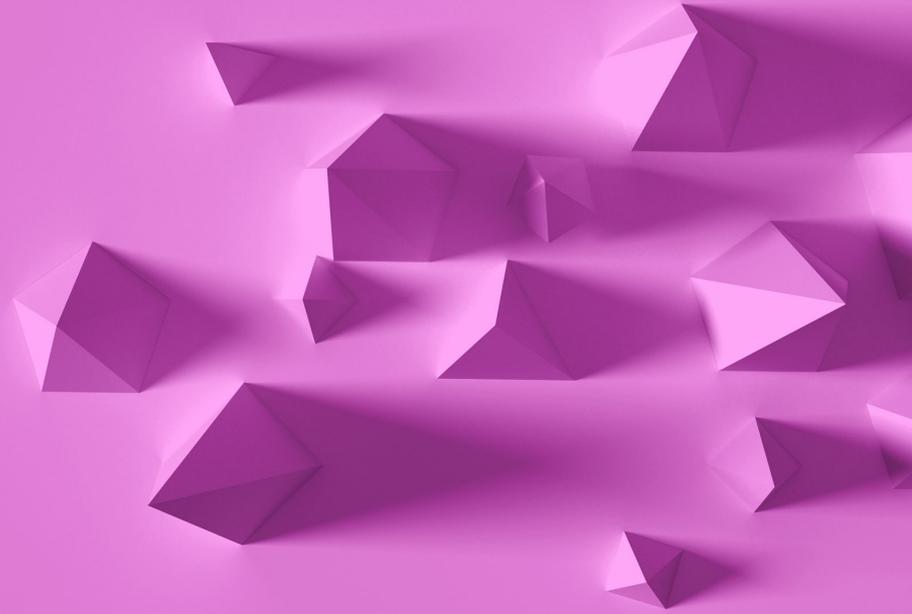
Manual processes

These take significant time on a repeated basis and are prone to errors.

OR

Custom solutions

These are usually very expensive and often need IT (which may not have resources available).

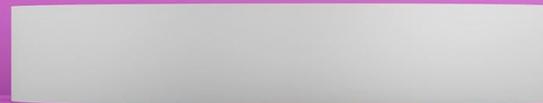


Smartsheet
has two
solutions:

Automatically
upload or sync
your data



Data Uploader



What is Data Uploader?

Data Uploader provides automation to merge or bring data from any system into Smartsheet.

Customers want to connect their critical enterprise systems so they can collaborate and have better visibility in one central location.

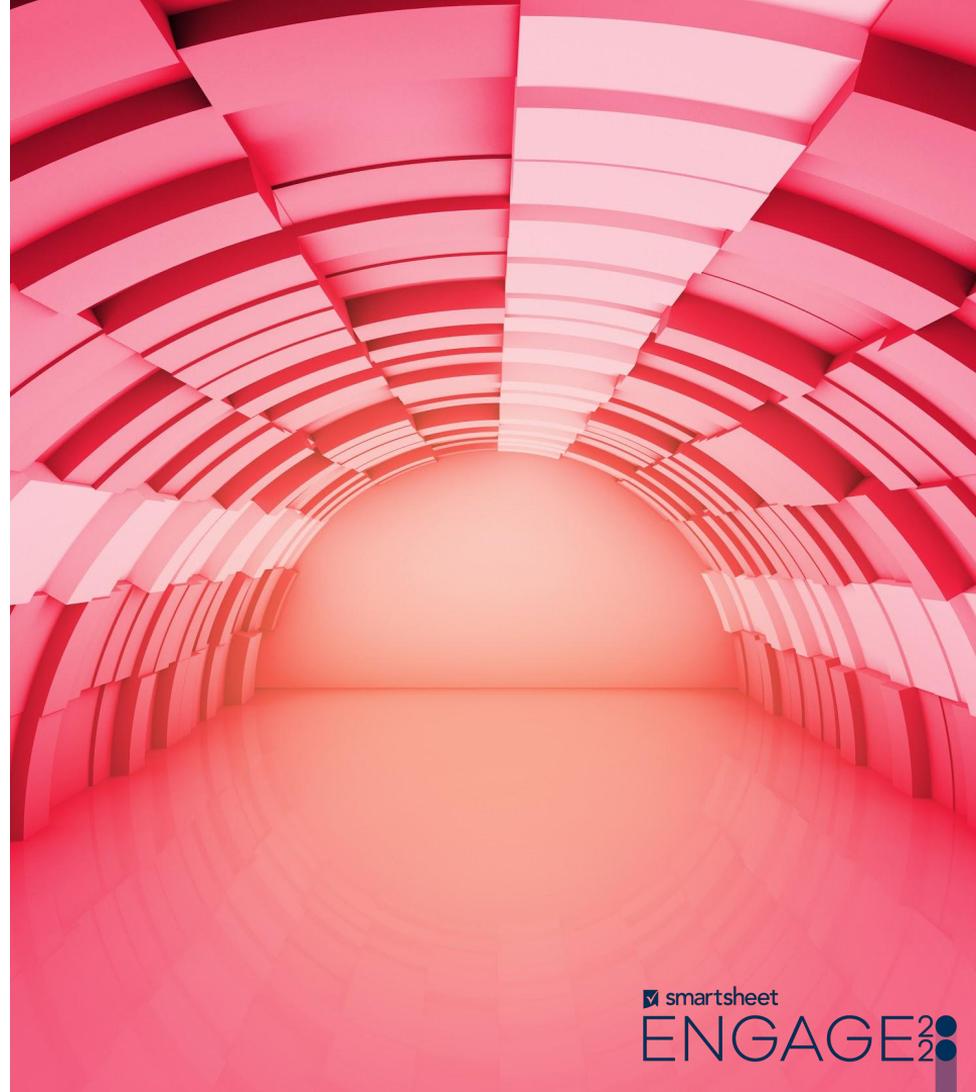
How it works

Any enterprise system that can export to CSV, MS Excel or Google Sheets can be automatically uploaded into Smartsheet for visibility and collaboration.



Versatile tool to centralize data

- I have reports from other systems that I regularly copy and paste into Smartsheet
- We can't get timely and accurate hourly billing info from our contract employees since they use a separate time-tracking tool
- Our executives need better overall insight from a number of different systems



Key use cases

Tracking project financial actuals

Set static sheet formulas referencing uploaded data

Schedule workflows to run as often as necessary to meet business needs

Tracking actual hours from external time tracking tool

Replace all Smartsheet rows with the latest upload file

Update sheet column dropdown values with data from an upload file

Input row filtering

Updates from ERP or CRM systems

Update existing rows, insert new rows based on a unique ID from any system that can export CSV, Excel or Google Sheet files

Automatic and manual column mapping

Menu driven and easy to use

Select the data source

Determine the sheet that data will flow into

Set up the filters and mapping you need

Decide whether to execute the workflow on a schedule

The screenshot shows a configuration window for a workflow named "DEMO: Timecards". The interface is divided into two main sections: a left-hand menu and a right-hand configuration area.

Left-hand menu:

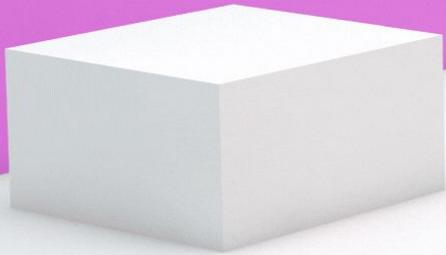
- Source** (checked): Select input file source and format.
- Target** (checked): Select target sheet and upload action.
- Filters** (checked): Control which input rows are imported into Smartsheet.
- Mapping** (checked): Map source to target columns.
- Schedule** (checked): Automatically execute the workflow on a schedule.
- Expressions** (checked): Values that can be imported into a column instead of data from the input file.

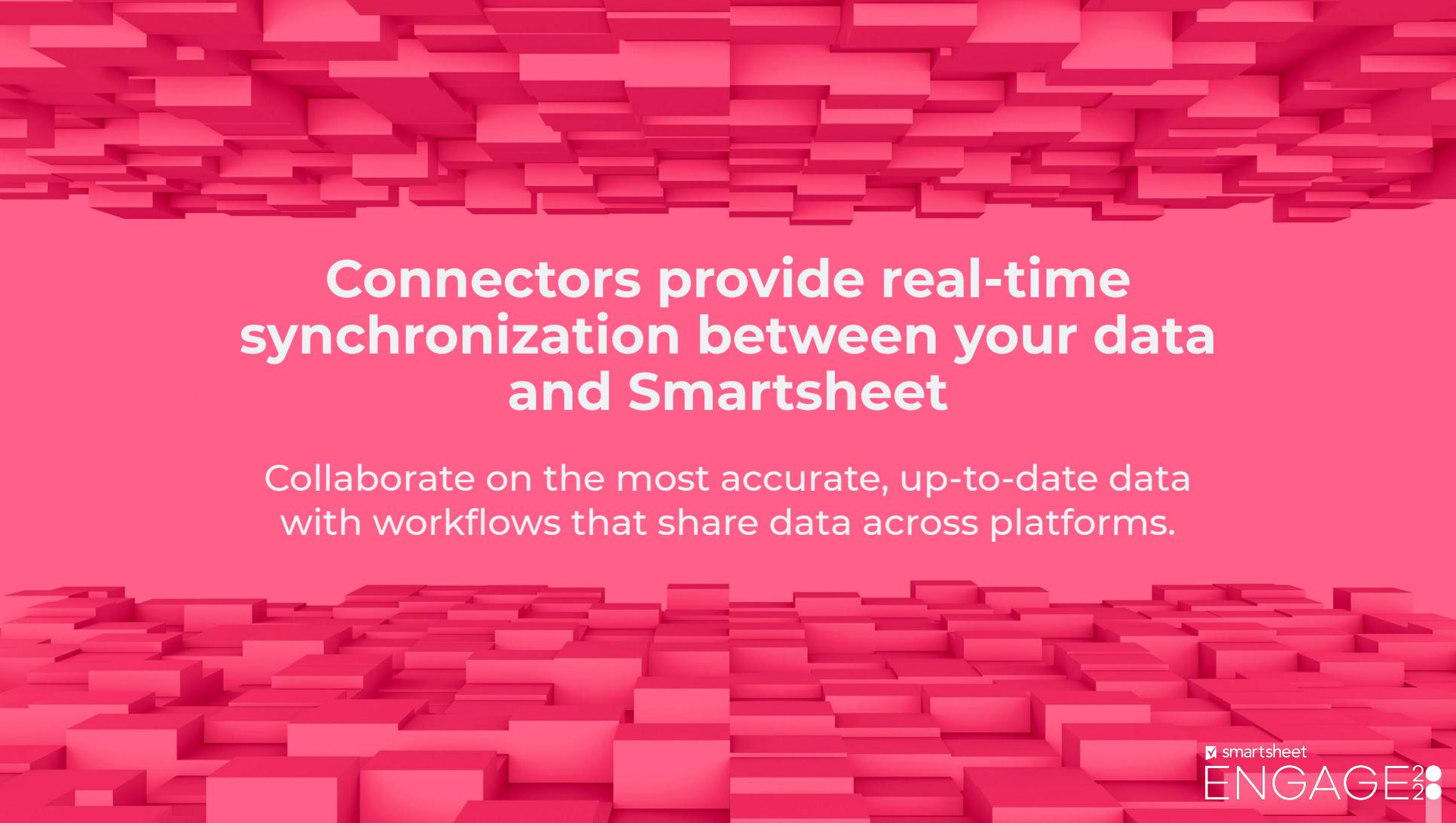
Right-hand configuration area:

- Name:** DEMO: Timecards
- Source Location:** Smartsheet Attachment
- Attachment Sheet:** DUP DEMO - Timecards Target
- Choose Attachment by:** Most recent
- Content Type:** CSV
- Delimiter:** Comma
- Does the CSV file have headers?:**
- First Row:** 1

At the bottom right, there are "Close" and "Next" buttons.

Smartsheet Connectors



The background of the slide is a vibrant red color. At the top and bottom, there are decorative borders composed of numerous 3D cubes of varying heights and orientations, creating a textured, architectural effect. The central area is a solid red field containing white text.

Connectors provide real-time synchronization between your data and Smartsheet

Collaborate on the most accurate, up-to-date data
with workflows that share data across platforms.

Smartsheet Connectors

Salesforce

CRM services with a suite of enterprise applications focused on customer service, marketing automation, analytics, and application development.



Microsoft Dynamics 365

A product line of enterprise resource planning and customer relationship management applications.



Jira

The #1 software development tool used by agile teams that provides a way for teams to track their issues.



Key use cases

Cross-org projects

- Enable collaboration between teams across platforms
- Unite the data into one centralized location

Ticketing

- Intake tickets more effectively with Smartsheet
- Feed that data into other platforms such as Jira or Salesforce
- Share real-time status

Services engagements

- Allow teams to work in their preferred platforms
- Push the data to Smartsheet to collaborate
- Use dashboards to share progress

How do these Connectors work?

The screenshot shows a configuration window titled "Map Salesforce fields to sheet columns". At the top, there is a navigation bar with tabs: "Settings", "Fields" (selected), "Salesforce Filters", "Sheet Filters", "Row Groups", and "Save". Below the navigation bar, the main content area has the heading "Map Salesforce fields to sheet columns" and a sub-heading "For each Salesforce field below, choose the corresponding sheet column to map field values to." There are eight rows of configuration, each with a Salesforce field name on the left, a directionality dropdown in the middle, and a Smartsheet column name on the right. The rows are: "Opportunity ID" (unidirectional), "Error Column" (unidirectional), "Close Date" (bidirectional), "Name" (bidirectional), "Stage" (bidirectional), "Probability (%)" (bidirectional), "Amount" (bidirectional), and "Account: Account Name" (unidirectional). At the bottom left, there is a link "add field". At the bottom right, there are buttons for "Cancel", "< Back", and "Continue".

Map Salesforce fields to sheet columns
For each Salesforce field below, choose the corresponding sheet column to map field values to.

Opportunity ID *	→ -	☒ Salesforce ID (Text/Number)
Error Column	→ -	☒ Sync Status (Text/Number)
Close Date	↔ -	☒ Close Date (Date) x
Name	↔ -	☒ Name (Text/Number) x
Stage	↔ -	☒ Stage (Picklist) x
Probability (%)	↔ -	☒ Probability (%) (Percentage) x
Amount	↔ -	☒ Amount (Text/Number) x
Account: Account Name	→ -	☒ Account: Account Name (Text/Number) x

[add field](#) Cancel < Back Continue

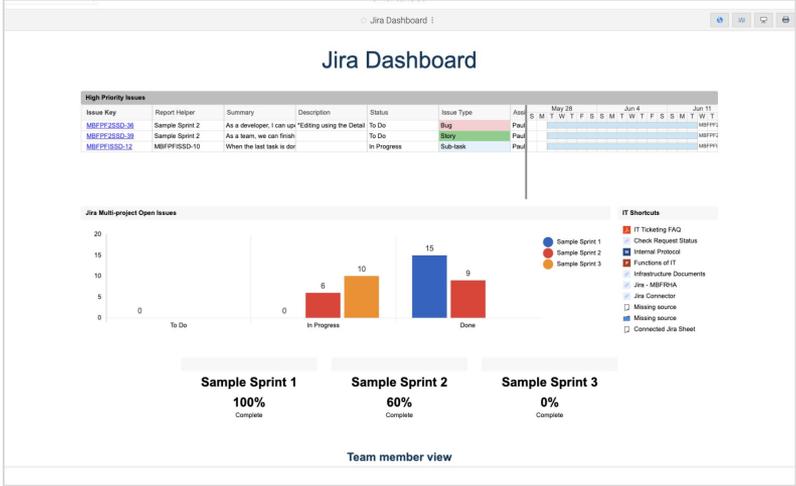
Copyright © 2018 Smartsheet ALL RIGHTS RESERVED

Map fields from respective platforms to Smartsheet

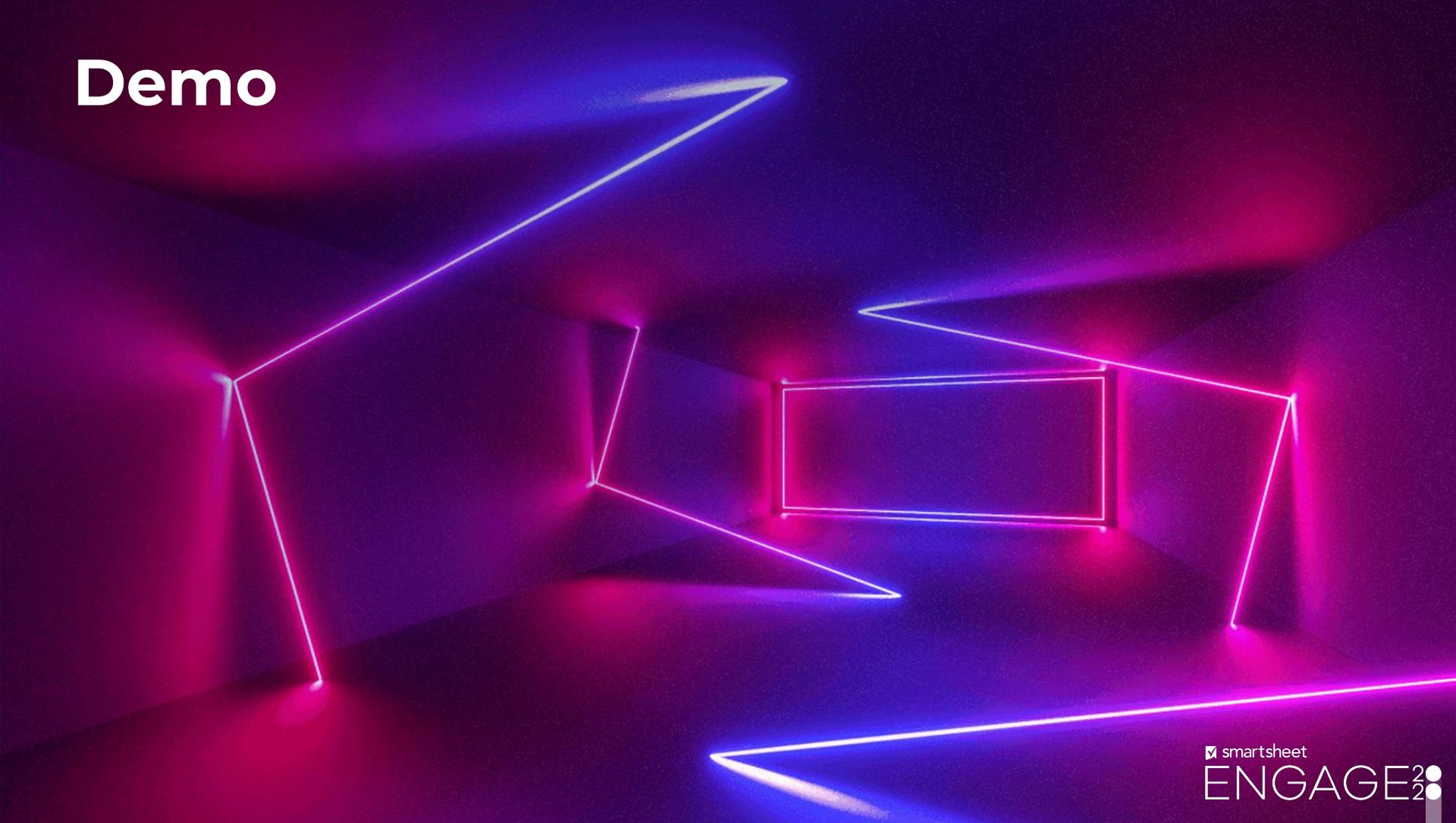
Your data can flow two ways:

- Bidirectional syncs
- Unidirectional syncs

Bring it all together...

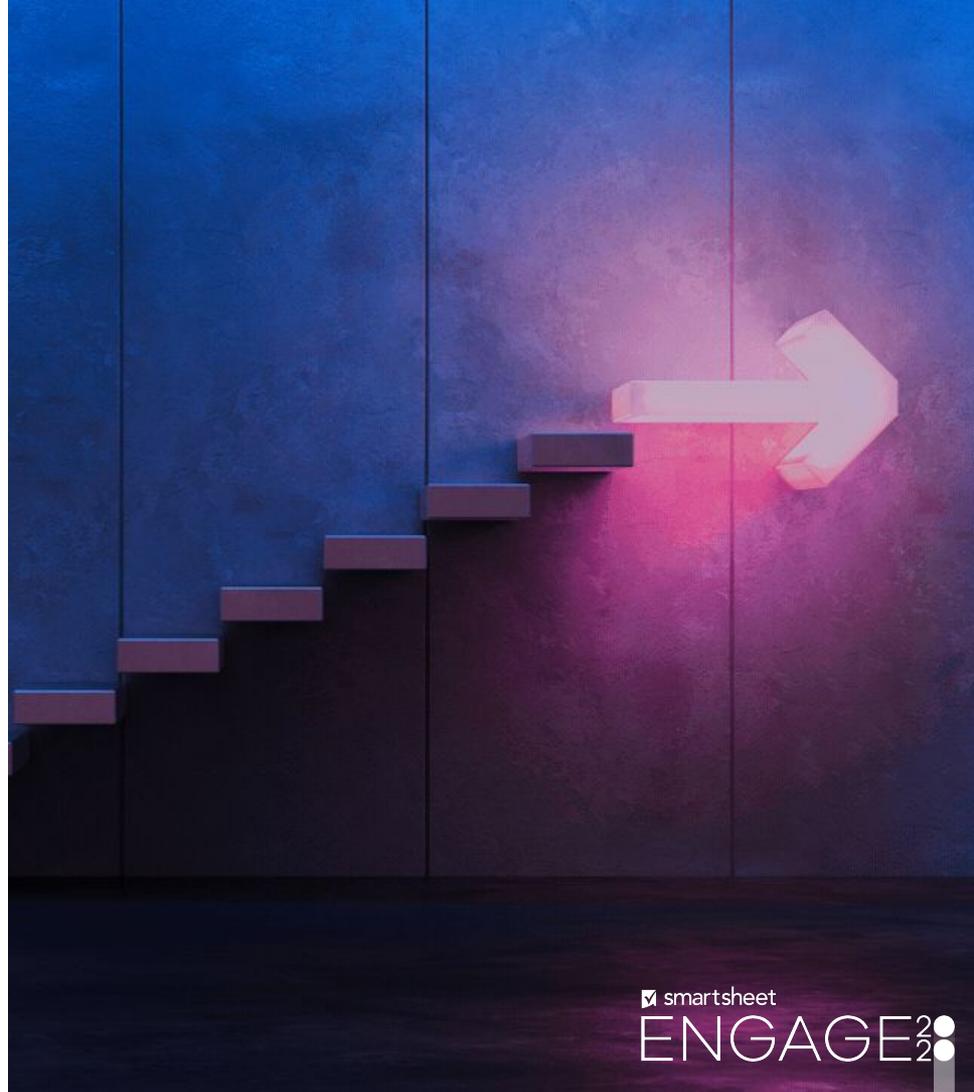


Demo



In closing...

1. Learn more about [Data Uploader](#)
2. Learn more about [Connectors](#)
3. Reach out to sales@smartsheet.com or to your account team for more information
4. Dig into an ENGAGE Brain Boost on [Bridge, Data Uploader, Connectors](#)



**Thank
you**



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