How to Build a Ticket Intake Process That Actually Works

Derek Tellin and Elektra Helde

Smartsheet
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Hi there!

Derek Tellin  
Business Solutions Analyst  
Smartsheet

Elektra Helde  
Sr. Product Marketing Manager  
Smartsheet
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Learning objectives

1. Get a high-level overview of an end-to-end request management process using Smartsheet and premium solutions.

2. Learn best practices for request management.

The problem

“Employees want to see their ticket progress. IT wants to be able to limit what each employee sees — and have a single master location where they can work all tickets.”

– Derek Tellin
Dynamic View

Share sections of your sheet or report without having to share the source item.

- Premium add on
- Securely shares only the information you want users to see from underlying sheets and reports
- Licensed sheet admins with access to Dynamic View can create new views
Helpdesk Ticketing Solution

Dynamic View → Request Sheet
Helpdesk Ticketing Solution

Dynamic View → Request Sheet

Update Request → Alerts & Reminders
Helpdesk Ticketing Solution

- Dynamic View
- Request Sheet
- Satisfaction Survey
- Update Request
- Alerts & Reminders
Helpdesk Ticketing Solution

Dynamic View → Request Sheet → Satisfaction Survey → IT Dashboard

Update Request
Alerts & Reminders
Demo
Additional resources

1. Learn all about Dynamic View in the Smartsheet Learning Center

2. Connect with IT PMO Smartsheet users in our Community

3. Dig into the ENGAGE Brain Boost for Dynamic View
Thank you
Q&A