

11BEG - Get Started With Smartsheet

Top 20 Questions & Answers

1. Q: What are the different user types in Smartsheet?

A: Smartsheet has two user types, licensed users (paid users) and free users. A licensed user is a paid user who can create new items in Smartsheet including sheets, reports, and dashboards, and share them with others. A free user is someone who does not have a paid Smartsheet license. Free users have the ability to view and/or edit the items they have been shared to, but they do not have the ability to create their own items without a license. To learn more visit our Help & Learning Center at

<https://help.smartsheet.com/learning-track/free-users/user-types-and-permissions>

2. Q: What are the sharing permission levels in Smartsheet.

A: When you share a Smartsheet item with someone, you can specify the sharing permission level with Viewer, Editor, or Admin level access to it. The permission level determines the features available to the person for the item you're sharing (a sheet, report, or workspace for example). If you create an item, you are the Owner of that item. To learn more, visit our Help & Learning Center at

<https://help.smartsheet.com/learning-track/free-users/user-types-and-permissions>

3. Q: Will this be recorded and available to watch at a later date?

A: Yes, all sessions will be available to rewatch through October

4. Q: Can you add a button to a form? like a yes or no option?

A: Yes, check out this link from our Smartsheet Community:

<https://community.smartsheet.com/discussion/66686/how-to-add-hyperlink-or-button-in-smartsheet-forms>

5. Q: What are the prices for subscriptions?

A: Visit our website here to get in touch with us and to learn more about subscription plans: <https://www.smartsheet.com/pricing>

6. Q: Can I archive part of a sheet but keep the link available so people can still enter into it?

A: Yes, you can move rows from a live sheet to an archive sheet, allowing your team to continue accessing the original. You can even set up an automated workflow to do this automatically when a row is completed. To learn more, visit our Help & Learning Center at www.help.smartsheet.com/articles/504748-moving-rows-columns-cells

7. Q: Is there a way to create a dropdown menu on a form and have all of the underlying data changed based on that input?

A: Absolutely! Visit our Help and Learning Center article here to learn more about conditional logic with Forms:

<https://help.smartsheet.com/articles/2481701-use-conditional-logic-to-streamline-form-submissions>

8. Q: Does Smartsheets have Youtube tutorials/videos for troubleshooting questions? or are the videos purely on Smartsheets community pages?

A: Smartsheet does have a Youtube channel: <http://youtube.com/user/smartsheet> .

Additionally, Smartsheet has a robust Help and Learning Center. You can find articles and videos here: <https://help.smartsheet.com/> . Additionally, we have a community page where our Smartsheet support team members and our large community of users help each other solve problems. You can find the community page here:

<https://community.smartsheet.com/>

9. Q: Where do I find the Engage Brain Boost?

A: You can find the Engage Brain Boost information at

https://learn.smartsheet.com/page/engage-brain-boosts?access_code=engage2020

10. Q: If an owner of a smartsheet item leaves the company, how can we assign a new owner for a smartsheet item?

A: Whoever is the SysAdmin for your company can transfer everything that person owns to a new owner:

<https://help.smartsheet.com/articles/1235045-transfer-a-paid-subscription#toc-transfer-access-to-a-multi-user-account>

You can also transfer ownership of individual items:

<https://help.smartsheet.com/articles/520103-change-the-owner-sheet-report-dashboard>

11. Q: Are there integrations to Microsoft teams or SharePoint?

A: Yes, you can learn more here:

<https://help.smartsheet.com/learning-track/best-practice-webinars/microsoft>

12. Q: I'm a new user and have been a bit confused about how to start. I want to create a sheet into which information from 3 teams flows via forms the team members create. Do I start with creating the sheet or the forms?

A: First, create a sheet you would like the information from forms to flow into. Then you can add multiple forms (maybe one for each team) to the sheet and distribute the forms to your various teams. We recommend checking out our Help and Learning Center article on Forms to learn more here:

<https://help.smartsheet.com/learning-track/smartsheet-intermediate/forms>

13. Q: To share with a 3rd level editor to my team, how does Smartsheet validate email addresses? Can I use any valid email address or does it pull from a specific directory?

A: You can share with anyone with an email address, as well as contacts in Smartsheet that you've collaborated with before, added to your contacts, or are part of your company's contacts list. If you are sharing a new email address that is not in your contacts, Smartsheet will ask that person to create a password the first time the login and add them as a free user.

14. Q: Can you edit an Excel or Word Doc within a document added to a sheet?

A: You can attach files to Smartsheet directly from an online source (Google Drive, OneDrive, Dropbox, Box, Evernote, Egnyte) or upload files directly from your computer. If you attach your files from an online source then you can edit that file directly and the most current version will always be attached to Smartsheet. If you upload a static file from your computer, then you can upload a new version if you need to make edits. To learn more about attachments visit our Help & Learning Center at:

<https://help.smartsheet.com/learning-track/get-started/attachments>

15. Q: How can I show this session to someone on my team who is not registered?

A: Registration is open through October, your team member can register after this and watch the session, or you can screen share.

16. Q: How do I submit product ideas to Smartsheet?

A: You can submit an enhancement request at

<https://app.smartsheet.com/b/form/739aa75f30ca43a8a22eb53e4da7d409> or by contacting the Support team at www.smartsheet.com/gethelp

17. Q: Where can I find webinars/what upcoming webinar/etc?

A: You can find upcoming webinars at www.smartsheet.com/webinars. You can currently register for webinars about new ENGAGE product releases, Document Builder, and Project Management, and new topics are always being added.

18. Q: What plan type am I?

A: You can view your plan by clicking on your picture in the upper right hand corner of the app and selecting plan info. To learn more about what's available on each plan visit www.smartsheet.com/pricing. To learn more, you can also contact your account team at www.smartsheet.com/contact.

19. Q: Where can we find more info about certification?

A: To learn more about our certification program visit <https://help.smartsheet.com/learning-track/getting-started-training/certification>

20. Q: Where can we learn more about training?

A: To learn more about our training offerings visit <https://help.smartsheet.com/training>