

22INT - Manage Document Workflows Faster

Top 20 Questions & Answers

- 1. Q: Can we trigger documents generated by the builder via workflows, or are they limited to manual intervention?**

A: An automated workflow action is not currently available for document builder, but this is a popular feature request, and we're watching requests closely as we consider future enhancements!
- 2. Q: Is the document builder included with my Smartsheet license or does it cost extra?**

A: The document builder is available at no additional cost on business, enterprise, and premier plans.
- 3. Q: Are you planning to add an integration for DocuSign or Adobe Sign so I can get signatures on my generated documents?**

A: Adding e-signature capabilities is a popular feature request, and we're watching requests closely as we consider future enhancements!
- 4. Q: Does the generated document dynamically update as you change a field in your sheet?**

A: No. You'll need to generate a new version of the document for the row, which can be done in just a few clicks.
- 5. Q: Is there a way to add data from multiple rows to a single document?**

A: At this time, you can only feed data from one row into each customized document.
- 6. Q: Can I add data from multiple sheets to a single document?**

A: No. Each custom document is created with the data from one row in a sheet.
- 7. Q: What permissions do I need on a sheet in order to use this?**

A: The Owner and Admins can edit all mappings on the sheet, including mappings created by others. Owners, Editors, and Admins can create mappings and edit their own mappings. Viewers can see the mappings and build documents for download, but cannot attach documents to rows.

8. Q: Can you generate documents for every row in your sheet?

A: Currently you can generate documents for up to 100 rows at a time. Each batch of 100 only takes a few clicks to generate so you can quickly generate multiple batches.

9. Q: Am I limited to one mapping per sheet?

A: No! You can save multiple mappings in your sheet to quickly generate different documents as needed.

10. Q: Can I use document builder on mobile?

A: No, document builder is currently only available on desktop.

11. Q: When do you recommend that I use document builder?

A: It really depends on what kind of documents and document-based processes your team uses! Document builder is a great option when the process is either intermittent and large-scale (e.g., annual performance reviews for your entire organization) OR ongoing and time-sensitive (e.g., purchase orders). It's also optimal when the document you want to customize contains a combination of standardized content and custom data.

12. Q: Does document builder require any coding?

A: No! The document builder uses a drag-and-drop interface to create the mappings between your sheet and a fillable PDF. And then you can use the mapping at any time to generate the custom documents for any row in your sheet.

13. Q: How do I access the document builder?

A: Select one or more rows in the sheet, open the row menu, and select **Generate Documents...**

14. Q: Can I download the documents I generate?

A: Yes, when you generate the documents you can either download all of them together in a zip file or attach them to their respective rows. Once attached to your rows, you can download the documents at any time.

15. Q: Do I need to export any data to generate the documents?

A: No, the documents are generated directly in Smartsheet with data from your rows. You have the option to download the documents in a zip file, but many users prefer to attach them to their respective rows where they'll be easily accessible for the team.

16. Q: Can I include images in my generated documents?

A: Yes! Make sure that the field in your fillable PDF is configured as an image field.

17. Q: Can I map a single dropdown column in my sheet to multiple checkbox fields in the generated documents?

A: No, the mapping requires a 1:1 relationship between fields in your sheet and fields in the fillable PDF. However, with a little extra work, you can use formulas to create multiple checkbox fields in your sheet based on the values in your dropdown field. Then you can map those checkbox fields to the fields in the PDF.

18. Q: Can I include or exclude certain sections in the generated PDF based on the data in my sheet?

A: Document builder cannot alter the layout or standardized content in the PDF based on the sheet data, but you can use formulas in your sheet to help leave certain fields in the PDF blank based on the values of other fields.

19. Q: How do I create a fillable PDF to use with document builder?

A: You will need to use a 3rd party tool such as Adobe Acrobat to create the fillable PDF.

20. Q: What can I do if I generate documents and then realize that I made an error in the mapping?

A: It's easy to edit the mapping at any time. Open the document builder, click the pencil icon next to the mapping you want to update, and make your changes. You can then regenerate the documents for any rows in your sheet using the correct mapping.