25INT - Automation, Unlocked: Build Workflows To Do Your Work

Top 20 Questions & Answers

1. **Q: Who can receive automation?**
    A: You can send automation to anyone - this can be an individual with an email address, users assigned in a contact list column, or even everyone shared to a sheet or to messaging apps. In each sheet, you can also [define who can receive automation](#), allowing third party apps or users not shared to the sheet.

2. **Q: Is there more in-depth training that goes into multi-step workflows?**
    A: You can find a [two-part webinar series](#) here or review the [Learning Track](#).

3. **Q: Can I define certain fields in the update request as read-only?**
    A: Any columns that are locked in your sheet, or have a formula in your sheet, will be read-only in an update request.

4. **Q: Can I receive automations in Slack?**
    A: Yes, you can define where to receive notifications, including Slack, Microsoft Teams, Google Chat, and Workplace by Facebook: https://help.smartsheet.com/learning-track/integrations-and-add-ons/messaging-apps

5. **Q: Can I request approvals from multiple levels?**
    A: Yes, you can create multi-step automation to combine any automated actions, including multiple approvals. Learn more here: https://help.smartsheet.com/articles/2479276-request-approval-from-stakeholder-%20in-sequence

6. **Q: Can I remove the unsubscribe option from automated notifications?**
    A: For legal reasons, we are required to include the unsubscribe link. We did just release more customizable options for alerts, including removing the sheet link email or just sending a message without the row grid. You can [learn more here](#).

7. **Q: Rather than sequential (one after the other), can you have multiple approvers at the same time?**
    A: Yes - you can create conditional paths to have automations that occur at the same time. https://help.smartsheet.com/articles/2479251-condition-blocks-filter-what-your-automated-workflows-send

8. **Q: Can you include attachments in automation?**
    A: Yes, you can include attachments in the automation itself, or use an attachment as an automation trigger. [Learn how to customize which columns, including attachments, are included in automation](#).

9. **Q: How do I create an archive process as mentioned?**
    A: Create an automation where the Action is 'move row to another sheet'. You'll need to have an archive sheet (a blank copy of your current sheet) already created. Then, you can set your trigger as any action, such as a status changing to Complete.

10. **Q: Can I copy rows between sheets with different structure?**
    A: Yes, but Smartsheet will copy data into matching columns, or create new columns for the data to be copied into. If you have the same columns (same name/column type) but in a different order, you can still use copy row.

11. **Q: How do I set up automation to ask for updates if a row hasn't been updated in a while?**
    A: You can (1) add a Modified Date column to your sheet and (2) create a reminder based on the last modified date - for example, if modified date is X days or more ago.

12. **Q: Can I notify my team when they are assigned to a task?**
    A: Yes, you can create an alert where the trigger is 'if Contact field changes' and the recipient of the action is 'Contact field'. This way, when a row is assigned to a user, we will send an alert only to the user being assigned.

13. **Q: Does Smartsheet resend update or approval requests if they aren't completed?**
    A: No, we do not resend, but you can create a follow-up automation with an additional condition. For example, if your first automation asks for an approval, your second automation can be scheduled to ask for an approval 7 days later, if the approval field is still pending.

14. **Q: Can I receive automated requests on my phone?**
    A: Yes, you can download the Smartsheet mobile app to receive push notifications.

15. **Q: Are automations received by email?**
A: Yes, automations are received by email as the default, as well as being visible in the Notification Center. You can customize how you'd like to receive automation, which can include mobile push notifications or alerts to messaging apps.
https://help.smartsheet.com/articles/2476551-configure-how-smartsheet-notifies-you

16. **Q: When automation is sent for a parent row, are child rows included?**
A: Automation is sent on a row by row basis, so rows that don't meet the trigger/criteria won't be included (even if they are a child/parent of one that does)

17. **Q: How can you automate if there are multiple task owners to one row?**
A: You can use multi-select contact columns to assign multiple people in a single column, or create multiple columns. Automation will send to all contacts in the cells.

18. **Q: Can I automatically provide a ticket or request number when forms are submitted?**
A: You can do this in two steps: (1) add an auto-number column to your sheet and (2) create an alert to send to the person submitting the row. This can include any column data for that row, including the number that is assigned.

19. **Q: Can we create a reminder that a date is coming up, before it is reached?**
A: Yes, when creating an automation, you can set your Trigger to be based on a date column in your sheet. You'll see an **On** drop-down that can be changed to # days before or after the date is reached.

20. **Q: Can I be alerted when conversations are added to my sheet?**
A: Yes, you can use comments as a trigger for your automation. You and your collaborators can also use @mentions to notify a specific user that a comment is directed at them.