

32ADV - Request Management Nirvana - How to Use Smartsheet to Master Multi-step Processes

Top 20 Questions & Answers

1. Q: When will you add more than one criteria for logic in forms?

A: We are considering more advanced features for conditional logic for next year. Please send us your feedback directly to the forms team and share the criteria you are looking for in conditional logic by submitting an enhancement request:

<https://app.smartsheet.com/b/form/739aa75f30ca43a8a22eb53e4da7d409>

2. Q: When will conditional logic be available for gov accounts?

A: Dynamic View and the latest forms experience will be available in Gov early next year

3. Q: How is Dynamic View different from manually creating reports for the separate groups, if reports can pull in only certain columns/fields that are pertinent to the group accessing that report?

A: It is different from reports in several different ways, but relating to users being able to access data - For a report the user would need to have access to the sheet(s) the report is using. For Dynamic View the users do not need access to the sheets, so you are able to protect sensitive data from visibility.

4. Q: Will this cover a form creating a JIRA ticket?

A: Yes, you could use this in conjunction with the Jira Connector to create Jira tickets from Smartsheet.

5. Q: What is the cost for dynamic view?

A: Dynamic View is a premium product available eligible to Business, Enterprise, and Premier plan customers for an additional fee. You can learn more by contacting our team here: <https://www.smartsheet.com/marketplace/premium-apps/dynamic-view>

6. Q: Are there form templates available?

A: We offer template sets in the solution center which include sheet and forms prebuilt for your solution.

- 7. Q: Is the conditional logic in forms a standard option now or part of an add-on?**
A: It is a part of a standard option. Check out our learning center to learn more about how to get started with this feature!
- 8. Q: Is Dynamic View decided by current user?**
A: It can be, based on a setting. The options to limit the rows shown are: current user, sheet filter or no filter at all (shows all rows)
- 9. Q: How is Dynamic View different from creating and sharing a report?**
A: With Dynamic View, you have additional capabilities like adding logic rules to further control how data is viewed or edited. Other features of Dynamic View can be found here: <https://www.smartsheet.com/marketplace/premium-apps/dynamic-view>
- 10. Q: How do you access Dynamic View?**
A: If your Smartsheet plan has Dynamic View, you'll be able to create views from dynamicview.smartsheet.com. Any views that you are shared to can also be seen at the same link. You can also access it from the App Launcher at the top right corner in Smartsheet. If your plan does not have Dynamic View, if user from other plans have created a view and shared it to you, you'll be able to see that view, but not be able to create any views yourself.
- 11. Q: How does Dynamic View differ than than the newly announced WorkApps and what would be the advantage to use either?**
A: Dynamic View and Workkapps are a great team. In WorkApps, like Dynamic View, you can give users read or edit access to sheets and reports without giving them access to the underlying sheet or report. With Dynamic view, you have even more control over what fields are available under what circumstances. Put them together and you've got a packaged solution with complete control..
- 12. Q: When will we be able to customize update request forms similar to new forms?**
A: We love that you use the new forms and want to see that same level of customization in update and approval forms as well. We plan to make significant enhancements to this feature next year.
- 13. Q: Can some of the conditional fields also be made required?**
A: Yes! any conditionally shown field can either be required or not. If it is required that field will only be required if it is shown on the form.
- 14. Q: How can I find the intermediate learning track for forms?**
A: <https://help.smartsheet.com/learning-track/smartsheet-intermediate/forms>

15. Q: Do Smartsheet forms cost an additional fee?

A: No, it's included as a part of your Smartsheet license.

16. Q: For Dynamic View, can attachments or comments be shared or not shared based on the viewer?

A: Not at this time. Visibility is per row and associated comments/attachments will be visible if the row is. Please submit an enhancement request for this feature:

<https://app.smartsheet.com/b/form/739aa75f30ca43a8a22eb53e4da7d409>

17. Q: Can you brand forms?

A: For now, forms can be branded based on your workspace branding for the sheet that it's tied to, but we're looking at this being a possible enhancement. To add your vote, please submit an enhancement request at the following link:

<https://app.smartsheet.com/b/form/739aa75f30ca43a8a22eb53e4da7d409>

18. Q: Can I embed forms on my own webpage?

A: Yes, you can! Review this help article for more information:

<https://help.smartsheet.com/articles/2481821-manage-and-distribute-a-form>

19. Q: Can you embed a Dynamic View in the newly announced WorkApps?

A: Yes, you can. Using Dynamic View as an external content page in your apps you build is a powerful way to package your entire solution together.

20. Q: How can I learn more about how customers are leveraging Forms and Dynamic View?

A: We'd recommend talking to your Account team, but also connect directly with other customers on our Smartsheet Community. The Smartsheet Community is a forum of Smartsheet customers who help each other answer questions, discuss strategies, and network. Click on the following link to get involved: <https://community.smartsheet.com/>