smartsheet
ENGAGE22

62MKTG - Turn Marketing Chaos Into a Smooth Operation

Top 20 Questions & Answers

1. **Q: What happens when you have multiple requests?**
   A: With Conditional Logic in Forms, you could theoretically capture information on multiple requests in a single form. However, if you're looking to track each request in a single row (or card), you would want the requestor to submit a new form for each request.

2. **Q: To start a proofing request, you have to be a licensed user, correct?**
   A: Yes. Only licensed users can upload files to a proof and send a proof request. However, you can 'Request Feedback' from anybody--all you need is their email address!

3. **Q: Can the item that needs to be proofed be a multiple page document?**
   A: Absolutely! You can also upload multiple images as a single proof. This is especially helpful when you need to review a pack of banners, for example, where the image is the same but the crops/specs are different.

4. **Q: In Proofing, I didn't see a button for "Approved with Changes." Can you add comments to a proof and also select the Approved button?**
   A: While there is no 'Approved with Changes' button, per se, you can always comment/annotate/@mention and still click 'Approve'. This is great feedback as we continue to evolve the Proofing experience.

5. **Q: Can you change the sheets/reports/dashboards after you've downloaded the Template Set?**
   A: Of course! Think of the Template Sets as a starting point. It's expected that you configure and tweak to fit your team's needs--just as you would a blank sheet. Keep in mind there are links/connections that could break if you start changing Column names, etc. For example, if a Template Set includes a report that's pulling in specific columns from a sheet, and you change the name of those columns at the sheet level, you'll need to update the Report to pull in that new column name.

6. **Q: Can you upload a video as a Proof?**
A: Yes! Video Proofing has now been made generally available (with time-stamped comments!). . Check out the session 'Revamp Your Creative Processes And Collaborate Seamlessly (Part II)' for more information on Proofing.

7. **Q: Would you recommend one form for all requests or multiple forms for different types of requests?**
A: That's really a personal preference. We recently released Conditional Logic which allows you to capture much more information while ensuring that people using the form will only answer the questions that are relevant to their submission. The underlying sheet might expand with lots of columns--but that's why we have Reports! We also have many customers using multiple forms and multiple intake sheets, and then use Reports to aggregate that data.

8. **Q: How do you share only *some* information to requestors but not the entire underlying sheet?**
A: Excellent question. I would encourage you to check out our Marketing Shared Services Accelerator (not to be confused with the Template Set) which is a more robust solution and includes some premium products like Dynamic View--which lets you share only the information you want to share, without having to provide access to the underlying sheets. This is an excellent solve for teams handling a large volume of requests with sensitive data (like budget information) that shouldn't be shared to others.

9. **Q: In Card View, can I add new ways to "View By..."?**
A: Of course! As long as the underlying data is there? In Card View, a lane is equivalent to a value in a dropdown, contact, or symbol column that you'd see in the Grid View; so, each available option in View By (in Card View) represents these aforementioned column types from the Grid View.

10. **Q: Sometimes we receive requests for marketing collateral and they want to use a specific image from our asset pack... how can they do that in Forms?**
A: With attachments! In the Form editor, you can add a field that allows the requestor to upload an attachment. This attachment will then carry over into the underlying sheet and will be attached in that specific row (or card).

11. **Q: Can I make project plans based on these requests and have it connect back to the intake sheet?**
A: Absolutely. Out of the box, the Template Set doesn't tackle this. However, you can add a column to the Intake Sheet and simply add the link to a separate sheet/project plan. For a more advanced and scalable solution, Smartsheet could automatically create sheets/reports/dashboards (anything you need for a project) and instantly provide that link in the cell--but this leverages a premium app called Control Center.

12. **Q: Is there a way to include budget information associated with each request?**
A: Yep, the Template Set is fully editable and customizable. You could simply add a column to the intake sheet to capture budget information--or even two columns for Estimates and Actuals. From there, you could create a separate report and/or dashboard to keep an eye on budgetary information. We also have some great templates specifically for budgeting purposes.

13. **Q: I noticed thumbnail images in the Card View during your demo, how can I do that?**
A: You can insert images to individual cells which will then populate in the Grid, Gantt, or Card Views (just right click > insert image, or drag and drop). It's a great way to visually locate certain projects/tasks--especially when there's a Proof.

14. **Q: What kinds of files are supported for Proofing?**
A: Image files (jpg, jpeg, png, bmp, gif), Video files (mp4, avi, mov), Adobe (PDF), and Microsoft Office files (doc, docx, dot, rtf, xls, xlt, xlsx, xltx, ppt, pot, pps, pptx, potx, ppsx).

15. **Q: Where can I learn more about Automation?**
A: Here! Automation is extremely powerful and can help eliminate a lot of unnecessary communication that is overly abundant in marketing teams.

16. **Q: How do you recommend I manage final assets in Smartsheet?**
A: Files can be attached at the row or sheet level to keep all necessary files within the context of your work. That said, Smartsheet is not a Digital Asset Management (DAM) solution, which is why we recently acquired Brandfolder (the #1 DAM) to meet that need. Brandfolder allows us to complete the content lifecycle all in the Smartsheet ecosystem. Teams can take ideas (and content) from concept, through execution, to publishing and storing. Today we just have some basic integrations with Brandfolder, but as I'm sure you can imagine, we will be bringing the products closer together over the coming months and years.

17. **Q: Can I use this Template Set with a trial?**
A: Yes! We recommend using template sets during a 30-day trial so you can get the most out of Smartsheet as possible.

18. **Q: Can you use automation with Proofing?**
A: Excellent question. We are very close to launching support for automation around proofing. You'll be able to map proofing data to the Grid (or Card or Gantt or Calendar) View and create rules in automation to trigger various actions. This will take the content collaboration process to the next level--stay tuned!

19. **Q: Does the Marketing Shared Services Template Set work with the Adobe integration?**

A: Yes! The Adobe integration is a separate plug-in that can interact with any sheet in Smartsheet (template set or not). For more information on the Adobe integration, click here.

20. **Q: Where can I learn more about Smartsheet for Marketing?**

A: Check out https://www.smartsheet.com/solutions/marketing for a high-level view into our Smartsheet for Marketing offerings. If you already have a license or are in a trial, be sure to check out the Solution Center where you'll find templates and other resources discussed during the ENGAGE Marketing track.