

smartsheet ENGAGE

Getting Started With
Alerts and Actions



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Have you ever wished to...

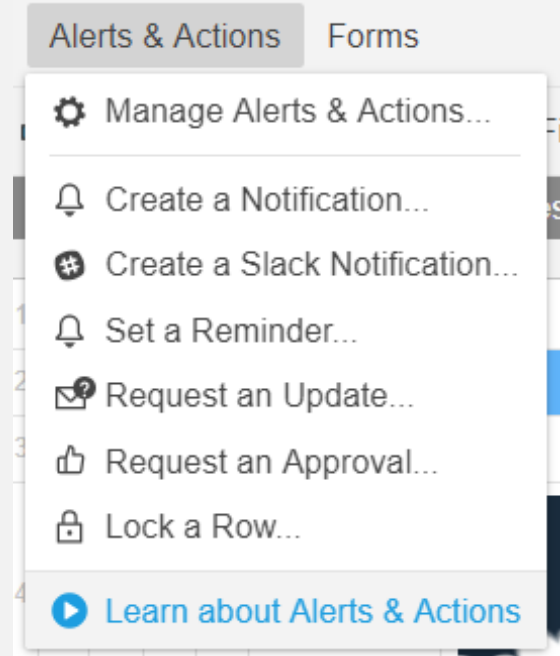
- Be kept aware of status changes?
- Be informed when a task goes into an “At Risk” or “Delayed” state?
- Be told you were assigned to a task?
- Send a Slack channel message pertaining to a group task?
- **Smartsheet Alerts & Actions can deliver on that and more!!**

Learning Objectives

- Define Alerts
- Define Actions
- Why & when I would use these options
- Where I can learn more about leveraging these options in my work

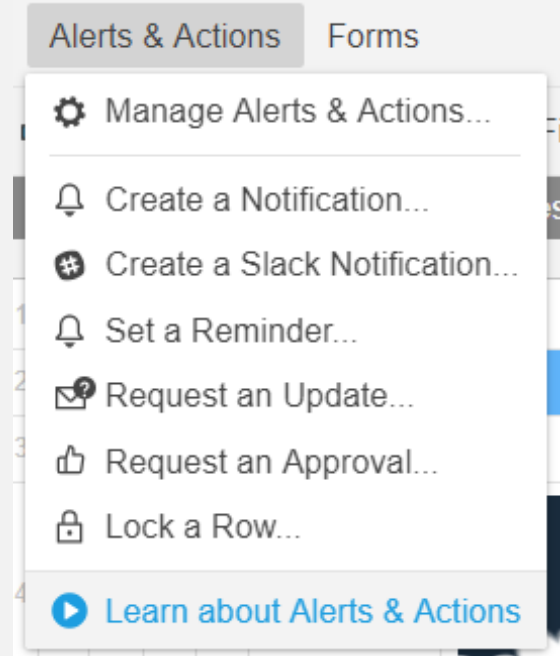
What is an Alert?

- An email, mobile, in App or third party application messages that is automatically delivered to an audience based on something being “true” on a sheet
- For Example:
 - Awareness of a task that is “At Risk”
 - A task or project that goes over budget
 - When you are assigned to a specific task(s) on a sheet



What is an Action?

- A change or request that is automatically triggered by something being “true” on a sheet
- For Example:
 - Expediting updates on corrective actions for “At Risk” tasks
 - Empowering approvals for over budget tasks
 - Locking rows to restrict future editing by collaborators



What Did We Learn?

- Definitions of alerts and actions in Smartsheet
- Use cases for automating alerts on your sheets
- How to set reminders at the row level
- Use cases for sending row level Update Requests with recurrence

How Can I Learn More?

At Engage

- Attend: Getting the Most From Alerts and Actions

Thursday, 11am-12pm

After Engage

- Smartsheet Learning Center
- Virtual Academy Classes
- Regional Academy Classes



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ENGAGE / Q&A

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Don't forget to:

- Share your feedback in our survey in the ENGAGE app
- Stop by the Smartsheet Automations & Integrations booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more



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