MODIFYING A DOWNLOADED TEMPLATE.

Any template you use is editable. You can clear sample data by selecting Clear Contents after right-clicking on a column header(s).

COPYING/PASTING FROM EXCEL.

You can copy (ctrl c) and paste (ctrl v) columns of data from Excel to Smartsheet. Once you are familiar with Smartsheet columns, we recommend using our import feature.

COPYING/PASTING TEXT INTO SMARTEASY.

Copy (Ctrl C) selected text from an e-mail or other application, double-click on the target cell in Smartsheet and paste using (Ctrl V).

REMOVING VS. DELETING ROWS.

Removing rows in a Smartsheet removes them from view in a sheet but allows them to be retrieved in a report. Deleting rows permanently removes data.

TASK NAME COLUMN.

We recommend that you use this as the column that best captures what you are tracking in a row. The task name field is used throughout the application to reference a row.

DRAG AND DROP.

You can drag and drop any row or column by clicking the row number or column title and dragging it to your desired location. Ctrl- or shift-click to select multiple items.

FILL DOWN.

Click on the bottom right corner of any cell and drag to fill data across multiple rows or columns.

REPORTING AND COLUMN SELECTION.

As you model your sheets, remember that the report builder is optimized for picklist, checkbox, and date type columns.