CrossCountry CONSULTING

Smartsheet Tips & Tricks Guide 2.0



smartsheet | aligned

Business Technology Review

CrossCounty Consulting offers a comprehensive and complimentary review of your Smartsheet environment and related systems.

What We Address

- Business Systems
- Core Process Areas
- Pain Points
- Integrations
- Best Practices
- Technology Goals

The result is clear and actionable steps you can take to streamline operations, consolidate tools and handle ongoing pain points, so you can get the most ROI from your tech stack.

Scan the code to get started

CrossCountry CONSULTING

CrossCountry Consulting is a leading provider of specialized finance, operations, and technology advisory services.

Our senior Smartsheet consultants leverage their deep expertise to unlock the full potential of the platform and configure it to your exact business needs.

- Design & Implementation
- Health Check
- Tailored Staff Training
- Customizations & Integrations
- Tech Stack Consolidation
- Account Administration

Navigation Shortcuts

	PC Shortcut	Mac Shortcut
Takes you to the top left cell of a sheet	Ctrl + Home	Fn + Control + Left Arrow
Takes you to the bottom right cell of a sheet	Ctrl + End	Fn + Control + Right Arrow
Moves you up in a sheet	PgUp	Page Up
Moves you down in a sheet	PgDn	Page Down

Insert/Select Rows & Columns

	PC Shortcut	Mac Shortcut
Insert a row above the selected row	Insert	Command + I
Select the entire column of your active or selected cells	Ctrl + Spacebar	Command + Spacebar
Highlight all rows/cells above the ones you've selected	Ctrl + Shift + Up Arrow	Command + Shift + Up Arrow
Highlight all rows/cells below the ones you've selected	Ctrl + Shift + Down Arrow	Command + Shift + Down Arrow
Select the entire row of your active or selected cells	Shift + Spacebar	Shift + Spacebar
Open the edit row dialog	Ctrl + E	Command + E

Tips for Using Copy & Paste

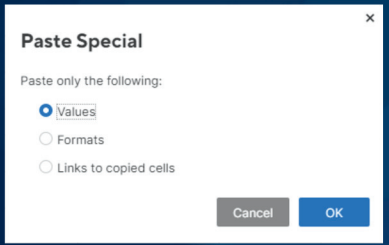
Shortcut

Ctrl+C (or Command+C) to copy
Ctrl+V (or Command+V) to paste

Paste Special

After you copy a cell or row, Right Click “Paste Special”

- Right-select menu commands (copy and paste don’t always function as expected when you switch between applications.)
- If you've copied a multi-line cell in Excel or other programs, double-click the cell in Smartsheet before pasting it. Doing this will prevent the lines from spilling over into the cells below.



Cell Related Shortcuts

	PC Shortcut	Mac Shortcut
Insert a carriage return or line break in text/number cells	Ctrl + Enter	Command + Enter
Insert a bullet point in the Cell	Alt + 0149	Option + 8
Enter edit mode on selected cell	F2	Fn + F2
Open hyperlink dialog for the selected cell	Ctrl + K	Command + K
Enter today's date in a date column	t	t

Create Efficient Formulas

@cell	@Cell functions like SUMIF and COUNTIF to perform calculations on each cell within the criteria, making your formulas more efficient; include IFERROR to handle blank cells gracefully.
@row	Use @row in your formulas to refer to the current row, improving performance by preventing cell reference updates when rows are added or moved; this results in faster load times and easier formula copying.
	Smartsheet Functions List (Scan QR Code or go to https://help.smartsheet.com/functions)

Hierarchical Functions

CHILDREN()	Reference rows indented one level Example: =COUNT(CHILDREN())
DESCENDANTS()	Reference all indented rows Example: =COUNT(DESCENDANTS())
PARENT()	Reference rows outdented one level Example: =COUNT(PARENT())
ANCESTORS()	Reference all outdented rows Example: =COUNT(ANCESTORS())

Ways to Share Data

	Reports Only	Sheets + Reports	Dashboards Only	Collections	WorkApps	Dynamic View
View all data	✗	✓	✓	–	–	✓
Collaborate with all data	✗	✓	✗	–	–	✓
“Save as new”	✓	✓	–	✗	✗	✗
View only their data	✗	✗	–	–	–	✓
Collaborate with only their data	✗	✗	✗	✗	✗	✓
Comment and add attachments	✗	✓	✗	✓	✓	✓
Guided with logic on what data is required	✗	✗	✗	✗	✗	✓

Column Linking In Table View

Column links let you pull data from one sheet into another without complex formulas or premium apps

Limitations

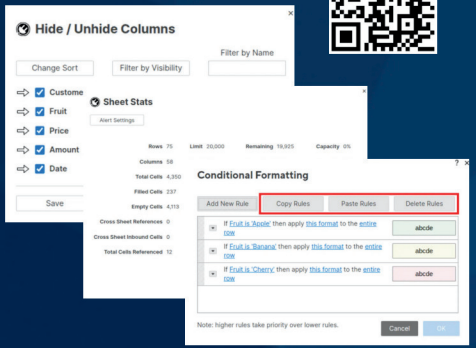
- **You can't use attachments, comments, and rich media in cells, such as hyperlinks and images, as data sources.**
- **Column links limitations are the same as the cell limitations of table view.**



SSFeatures

Exclusive Engage 20% off discount coupon: "ENGAGE2025"

- **Instantly hide and unhide the exact columns that you want.**
- **See stats and alerts about your sheet, so you know how close you are to the sheet limits.**
- **Quickly copy and paste automations, conditional formats, and columns.**



Resources for Building Solutions

	Scan QR Code for Website
Use Emojis to enhance your Smartsheet experience. They can be used in folders, dropdowns, metrics, dashboards and more!	https://emojipedia.org
Create custom color pallets to make dashboards look as good as they perform	https://coolors.co
Adapt your color pallet to be accessible to individuals with color vision deficiencies	https://color-blindness.com Navigate to “Color Tools”

Additional Resources

Smartsheet Community Best platform for requesting help, generating new ideas, and fun Swag!	https://community.smartsheet.com
Smartsheet University	https://smartu.smartsheet.com/
Smartsheet Help Center	https://help.smartsheet.com/
Smartsheet Early Adopter	https://www.smartsheet.com/eap
Smartsheet Mobilizer	https://www.smartsheet.com/mobilizer