SCScloud

smartsheet | aligned

TIPS & TRICKS GUIDE



DISCOVER INNOVATIVE SMARTSHEET SOLUTIONS

SCS Cloud is a leading NetSuite, Smartsheet & Salesforce Consulting Firm that specializes in implementation, support and crafting business intelligence for organizations in a diverse range of industries.

Our consulting teams have worked with hundreds of clients worldwide and maintain a reputation for using their unparalleled knowledge and expertise to streamline processes, accelerate expansion and create an exceptional client experience.

CLICK THE CODE  TO LEARN MORE

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BUSINESS TECHNOLOGY REVIEW

SCS Cloud offers a comprehensive and free of charge review of your Smartsheet environment and related systems, conducted by our team of senior consultants.

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.

CLICK THE CODE
TO GET STARTED

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NAVIGATION SHORTCUTS	PC SHORTCUT	MAC SHORTCUT
Display the Go to Row Dialog to Navigate to a Specific Row	Ctrl + G	Command + G
Find Information Within a Sheet	Ctrl + F	Command + F
Move to the First Cell of the Current Row	Home	Fn + Left Arrow
Move to the Last Cell of the Current Row	End	Fn + Right Arrow

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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

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INSERT/SELECT ROWS & COLUMNS	PC SHORTCUT	MAC SHORTCUT
Insert a Row Above the Selected Row	Insert	Control + 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 Sells	Shift + Spacebar	Shift + Spacebar
Open the Edit Row Dialog	Ctrl + E	Command + E

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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

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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 (Click QR Code or go to https://help.smartsheet.com/functions)

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HIERARCHY SHORTCUTS	PC SHORTCUT	MAC SHORTCUT
Indent The Row (You will see the indent level in the Primary Column only)	Ctrl +] (right bracket)	Command +] (right bracket)
Outdent The Row (you will see the indent level in the Primary Column only)	Ctrl + [(left bracket)	Command + [(left bracket)

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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())

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RESOURCES FOR BUILDING SOLUTIONS

SCAN 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”

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WAYS TO SHARE DATA	REPORTS ONLY	SHEETS + REPORT	DASHBOARDS ONLY	WORKAPPS	DYNAMIC VIEW
View All Data	✗	✓	✓	−	✓
Collaborate With All Data	✗	✓	✗	−	✓
“Save As New”	✓	✓	−	✗	✗
View Only Their Data	✗	✗	−	−	✓
Collaborate With Only Their Data	✗	✗	✗	✗	✓
Comment & Add Attachments	✗	✓	✗	✓	✓
Guided With Logic on What Data is Required	✗	✗	✗	✗	✓

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RISKS SHARING DATA	REPORTS ONLY	SHEETS + REPORT	DASHBOARDS ONLY	WORKAPPS	DYNAMIC VIEW
View All Data	✗	⚠	⚠	⚠	✓
Collaborate With All Data	✗	⚠	✗	⚠	✓
“Save As New”	✓	⚠	⚠	✗	✗
View Only Their Data	✗	✗	⚠	⚠	✓
Collaborate With Only Their Data	✗	✗	✗	✗	✓
Comment & Add Attachments	✗	⚠	✗	⚠	✓
Guided With Logic on What Data is Required	✗	✗	✗	✗	✓