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

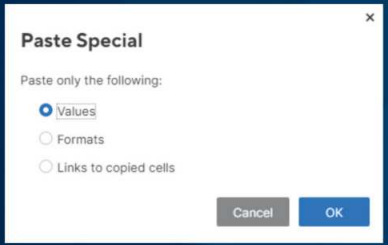
## Shortcut

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

- **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.**

## Paste Special

**After you copy a cell or row, Right Click "Paste Special"**



# 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<br>Example: =COUNT(CHILDREN()) |
| DESCENDANTS() | Reference all indented rows<br>Example: =COUNT(DESCENDANTS()) |
| PARENT() | Reference rows outdented one level<br>Example: =COUNT(PARENT()) |
| ANCESTORS() | Reference all outdented rows<br>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

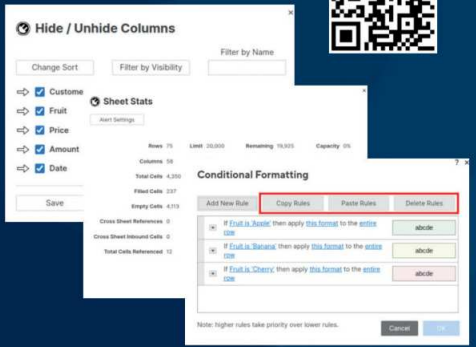
- **You can't use attachments, comments, and rich media in cells, such as hyperlinks and images, as data sources.**
- **Column links limitations are the same as the cell limitations of table view.**



# 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**<br>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 |