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Tips & Tricks Guide 3.0

Smartsheet Aligned



Smartsheet. Connected.

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Build better solutions. Connect your systems. Keep work moving.

Smartsheet services
Build & improve Smartsheet

- Solution design & builds
- Control Center & portfolios
- Dashboards & automation
- Training & ongoing support

NetSuite integrations
Connect NetSuite/Smartsheet

- Sync project & customer data
- Bring finance into workflows
- Reduce manual data entry

AI meeting integrations
Meetings to Smartsheet

- Meeting notes to Smartsheet
- Capture action items
- Track owners & follow-ups

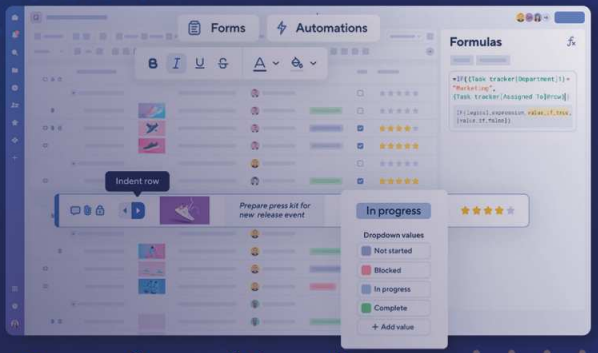
Bring us the messy version.

We'll help you map the path forward.
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Explore our services
Scan to connect

New Table View

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Auto Save!
Collaborate in real-time
See updates as they happen

Build formulas faster
Autocomplete and one-click column formulas make formulas easier to create and manage.

Organize with color
Colored dropdowns make your data easier to scan without relying on conditional formatting.

All Views ›

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AI Smart Columns

ONLY IN TABLE VIEW

Summarize

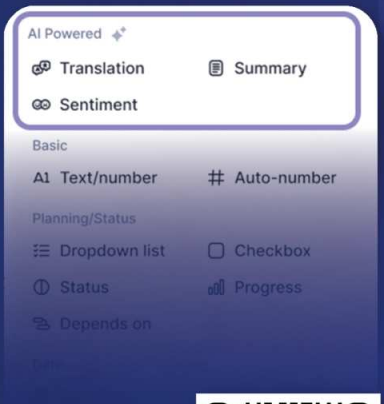
Turn messy project details into clean, polished notes. no spelling or grammar worries!

Sentiment

Quickly identify whether customer feedback, project notes, or support updates are positive, neutral, or negative.

Translate

Support global teams by automatically translating updates and even building reports or dashboards in multiple languages.



Five things NOT to do

Do not copy rows between teams & people

Use one source of truth with reports & Dashboards.

Do not give everyone Admin

Use one source of truth with reports & Dashboards.

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Do not manage all projects on one BIG LONG sheet

Separate project plans and roll them up for portfolio visibility.

DO NOT OVERCOMPLICATE IT

If end users cannot understand the solution, they will not adopt it.

DO NOT TRUST AI WITH CRITICAL ACTIONS

You might end up with bad data. Ask AI to ensure you have no Overdue tasks might delete them all from a project!

That Doc Generator

Tired of fillable PDF's and 1 row generation?



Now pick the format you want:
Word - Google Docs - PDF

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Start your 5-day free trial

Shortcuts worth knowing

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ACTION	WINDOWS	MAC
Find in sheet	Ctrl + F	Cmd + F
Indent row	Ctrl +]	Cmd +]
Outdent row	Ctrl + [	Cmd + [
Line break in a cell	Alt + Enter	Cmd + Enter
Select entire row	Shift + Space	Shift + Space
Add a hyperlink	Ctrl + K	Cmd + K

Line breaks: turn on Wrap Text to show every line.

Cmd = Command on Mac. | Shortcuts can vary by view.

Ways to Share Data

Choose the right way to share your Smartsheet data.

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	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	✗	✓	✗	✓	✓	✓
Guide users on required data	✗	✗	✗	✗	✗	✓

✓ Yes ✗ No — Depends

Capabilities depend on permissions, configuration, and plan.

Create Efficient Formulas

Smarter references. Less formula maintenance.

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@cell

Evaluate each cell in a range.

Use @cell in SUMIF or COUNTIF criteria to calculate as each cell is checked. Add IFERROR for blank dates.

```
=COUNTIF([Due Date]:[Due Date], IFERROR(YEAR(@cell), 0) = 2026)
```

@row

Reference the row you are on.

Replace fixed row numbers with @row. Copy formulas without manually updating row references.

```
=IF([Complete]@row = 1, "Done", "Open")
```

Explore the Smartsheet function list

Scan the QR code or visit: help.smartsheet.com/functions

SSFeatures

More tools. Fewer clicks.



Show the columns you need

Hide and unhide specific columns without unhiding everything.



Sorting & views

Auto-sort rows after form submissions. Sort with filters turned on.



Copy your setup faster

Copy automations, conditional formatting, and columns.

A browser extension for Smartsheet.

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Discount

Use code

TCC

Scan to explore ssfeatures.com

Resources for Building Solutions

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Emojipedia

Find emojis for folders, dropdowns, and dashboards.

emojipedia.org

Coolors

Create a consistent color palette for dashboards and reports.

coolors.co

Color accessibility

Preview how your dashboard looks with different types of color vision.

color-blindness.com

Scan a QR code to open each resource.

Dropdown linking

One master list. Every dropdown stays in sync.

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1. Start in table view

Add a Dropdown list column to your target sheet.

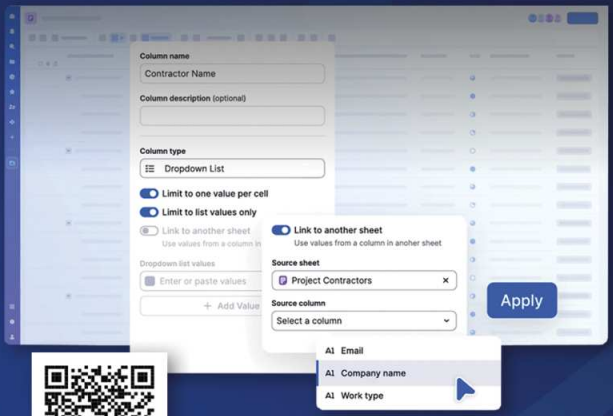
2. Turn on the link

Enable Link to another sheet in the column settings.

3. Choose your source

Select the source sheet and column, then choose Apply.

Great for client, vendor, project, and product lists.



Scan for the full steps.

Resource Management

Know who is available before you commit.

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See your team's capacity

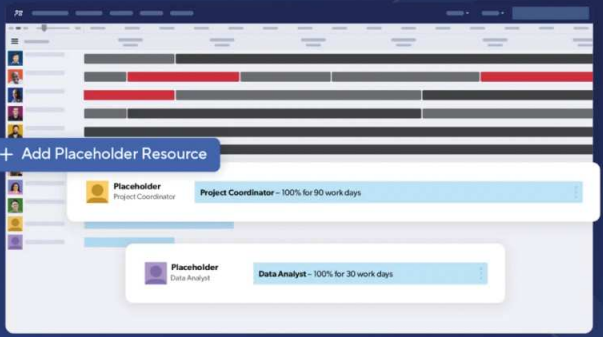
Spot availability and overbooked schedules.

Build the right team

Match skills and roles to upcoming work.

Learn from actual time

Use tracked hours to build



Plan roles before assigning people.

TIP: Dates + day length

Allocation uses start/end dates and working hours per day.

5 workdays × 8 hours/day × 50% = 20 planned hours

Example assumes no leave. Check weekends and holidays.

Scan to learn more

Scenario Planning

Test the what-if before changing the live plan.

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1. Build a scenario

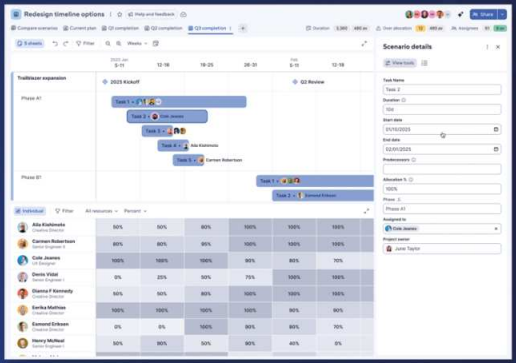
Create > Scenario plan.
Add existing project sheets.

2. Test your options

Shift dates, people, and allocations. Compare impact.

3. Review, then apply

Check changes and conflicts before updating live sheets.



Tip: Applying locks the whole scenario plan.

Enterprise required. Start with existing sheets.
You need Admin access to create and apply.

Scan to learn more