SMARTSHEET GUIDE

Out of the Box Receiving, LLC uses Smartsheet as a documentation system for inventory and receiving purposes. Smartsheet is an online tool used to help organize inventory and communicate with our Designers.

Designers can use this tool as the **priority communication** with Out of the Box Receiving, LLC. Please reference this guide as a How-To on the use of Smartsheet. We are happy to help you learn how to use this product to streamline communication and identify key information related to specific jobs.

Please reach out with any questions you may have: 929.400.7345

This Step-By-Step guide will help you learn how to:

- Create a Smartsheet Account (required, FREE)
- Access OOBR Inventory
- View received, inspected, damaged items
- Make/respond to comments that our team members have made directly in the document
- Communicate with OOBR team members any concerns/questions regarding specific items
- Share pertinent information regarding specific items or jobs

FOLLOW THE INSTRUCTIONS IN GREEN – STARTING ON PAGE 3
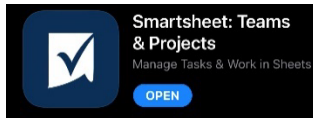
We recommend downloading the **Smartsheet app** to your phone for ease of access. FREE. Compatible with any phone type.

SMARTSHEET GLOSSARY – Examples of how we use Smartsheet to track your items. Each Smartsheet page is organized to include the following:

- **Item**
  - Actual name or a quick identifying description of the product that is either written on the packing slip or the actual box of the item received
- **Quantity**
  - The number of items we physically have in our warehouse
    - This may differ from the quantity of items that you have ordered as it ONLY reflects the number of items we have physically received so far in our warehouse
    - This number may change depending on shipments received and does not include upcoming shipments
- **Date**
  - The date we received the product
  - This is NOT the date the product was ordered by you or shipped to our warehouse from the vendor
- **Vendor**
  - This reflects who the product was made by (i.e. Bungalow 5, Forty West, etc.)
- **Description**
  - The actual product description that is either on the packing slip or the box
  - If a description is not provided on the packing slip or the box, we will do our best to provide an accurate description of the product
  - This helps us search for and identify the products quickly
  - We may also include any information here that pertains to any possible damages or concerns regarding this product for you to review
- **Status**
  - Green – product has been received, inspected, and has no damages/concerns noted
  - Red – product has been received, inspected, has visible damages, we have questions, or needs special attention
- **Inspected By**
  - This reflects which team member (initials) in our warehouse who has physically inspected the product
  - We use this to streamline communication in our warehouse if there are any specific questions we may have regarding specific items in our inventory
- **Room**
  - This reflects where the product is being delivered to upon installation (i.e., Living Room, Master Bedroom, etc…)
- **Picture(s)**
  - This is an actual picture of the product and packing slip or label after being received, opened, and inspected upon entering our warehouse
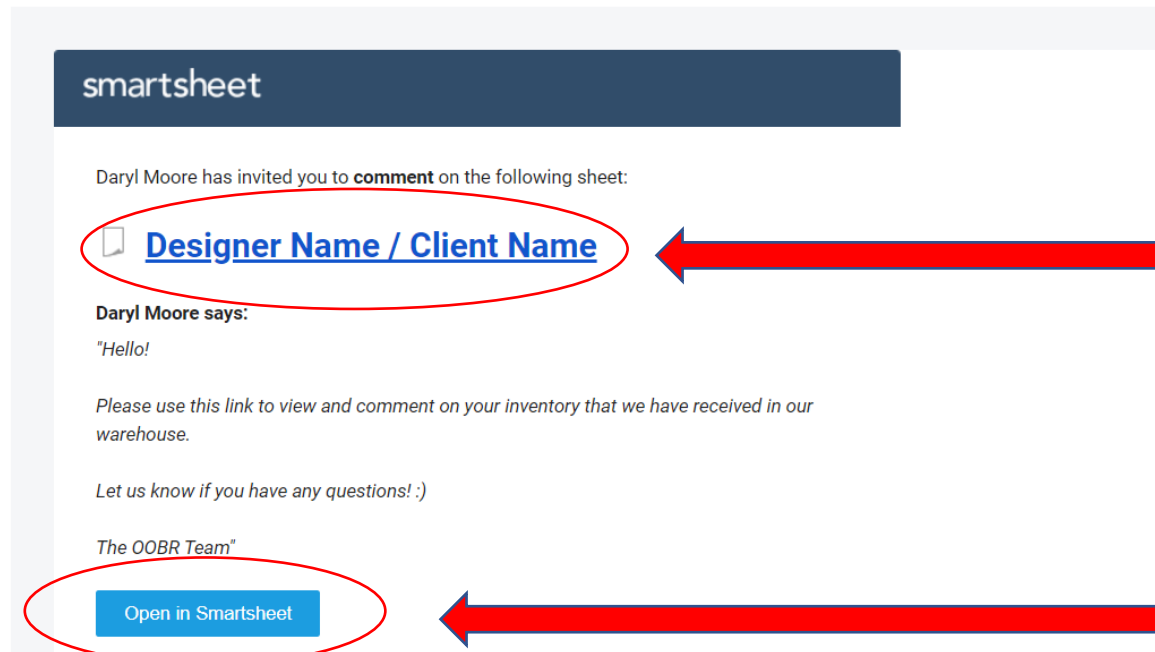
How Do I View/Use Smartsheet?

When we receive shipments labeled to you, we create a Smartsheet page that has your name and client's (or customer) name on it with your inventory for you to view at your convenience.

1. After we create your Smartsheet page and started the inventory process, we will share the link with you via email directly from the Smartsheet software system.

You will receive an email that looks like this:

Daryl Moore invited you to comment on the Designer Name / Client Name sheet ➤

Daryl Moore via Smartsheet <user@app.smartsheet.com>
to me ▾

smartsheet

Daryl Moore has invited you to **comment** on the following sheet:

📄 **Designer Name / Client Name**

Daryl Moore says:

"Hello!

Please use this link to view and comment on your inventory that we have received in our warehouse.

Let us know if you have any questions! :)

The OOBR Team"

Open in Smartsheet

Your Name will be listed as the Designer and your customer will be listed as the Client.

For example:

Daryl Moore / Frederica

Click on this button to access your Smartsheet directly.

Browser and App Options:

This link will ONLY give you access to this particular Client (customer/job).

If you have multiple Clients, you will be granted access to view these pages too within Smartsheet.

Mark these emails as <u>important</u> in your inbox or file them in a specific category within your preferred email to make it easier to find the link in your system. Or, you can go to the Smartsheet Website directly.
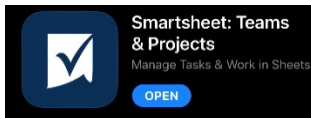
Smartsheet: Teams & Projects — Manage Tasks & Work in Sheets — **OPEN**

We recommend downloading the Smartsheet app to your phone for ease of access. FREE. Compatible with any phone type.

You can also Bookmark the Smartsheet tab at the top of your Browser. Click Here.

https://app.smartsheet.com/b/home

You can also copy and paste this link into your browser. It will take you directly to Smartsheet. Be sure to use the same email to create an account and login that we used to share with you.

How do I view my link?

3. You will need to Create a FREE Smartsheet Account. This is required by Smartsheet.

There are two options:
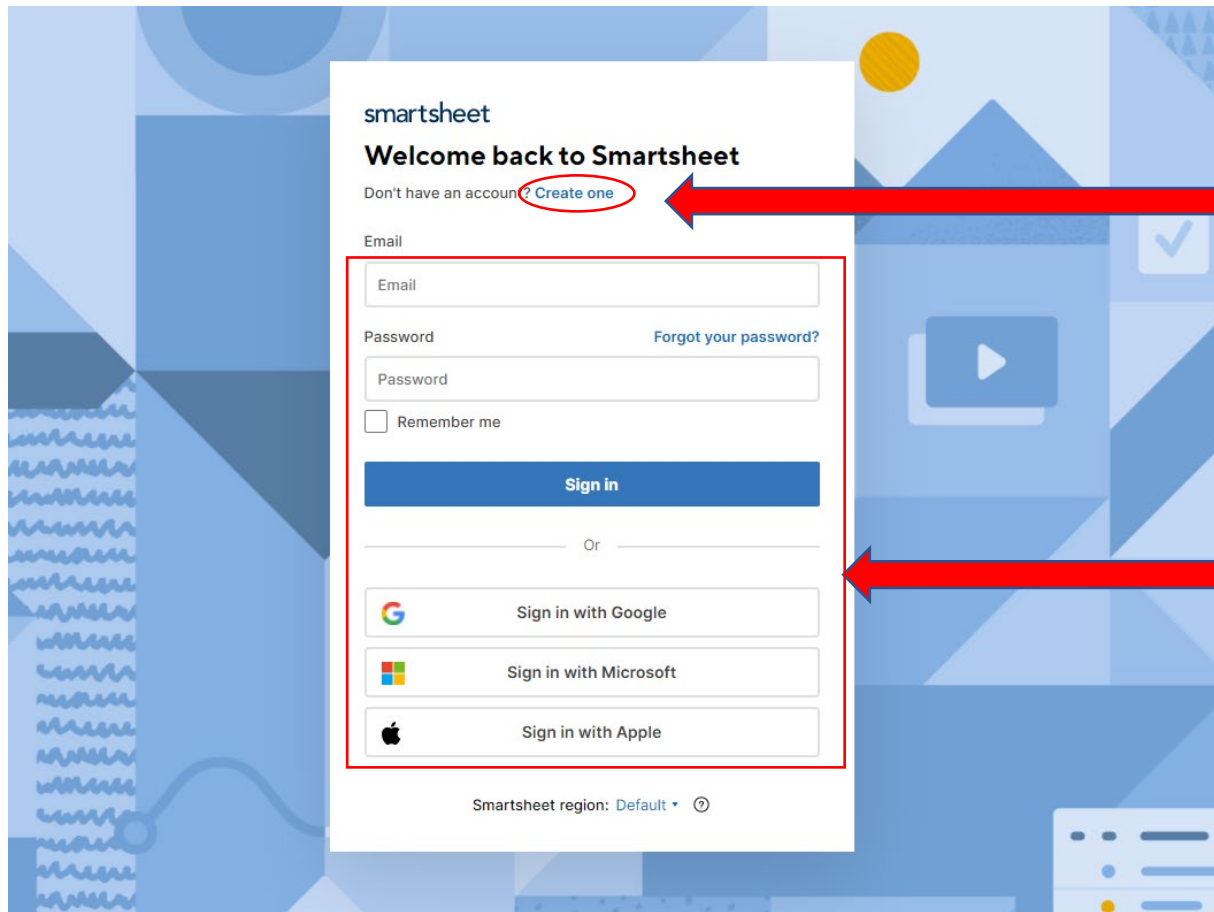
1st Option:

Click on this button to create a Smartsheet account. *This is __FREE__.*
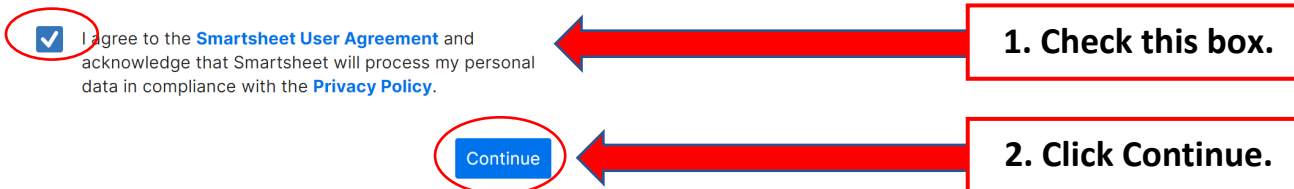
2nd Option:

If you already have a Smartsheet account, sign in like you normally would to access your link.

Create a Free Account:

4. Follow the prompts to Create your FREE Account. To access your inventory, you must create a Smartsheet account (we don't make the rules, sorry!).

One thing first ...

Please accept our User Agreement

☑ I agree to the **Smartsheet User Agreement** and acknowledge that Smartsheet will process my personal data in compliance with the **Privacy Policy**.
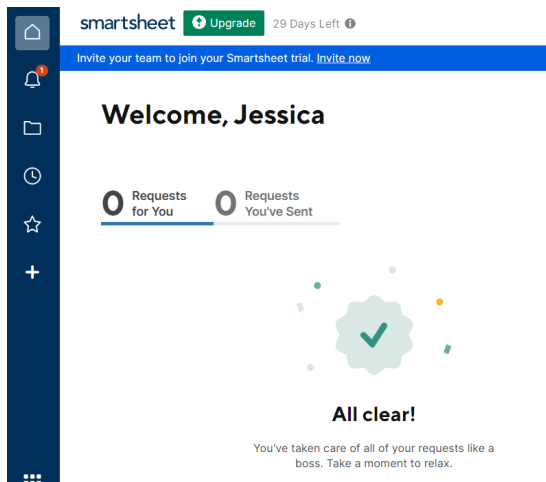
← **1. Check this box.**

Continue ← **2. Click Continue.**

5. After following the prompts to Create an Account, it will bring you to the Home Page:

smartsheet ⊕ Upgrade 29 Days Left ⓘ

Invite your team to join your Smartsheet trial. Invite now

Welcome, Jessica

O Requests for You   O Requests You've Sent

✓

All clear!

You've taken care of all of your requests like a boss. Take a moment to relax.

Home Page Menu:

6. On the lefthand side, there is a menu that gives you access to the Smartsheet pages/links we have shared with you.

This is helpful because it will direct you to the inventory that we have in house for you.

It will also show you any Notifications you may have that require your attention.

<u>**Home**</u>

<u>**Notifications**</u> – here you can view any notifications/questions we may have regarding specific inventory items

<u>**Browse Folders**</u> – here you can view all your Smartsheet links in one spot
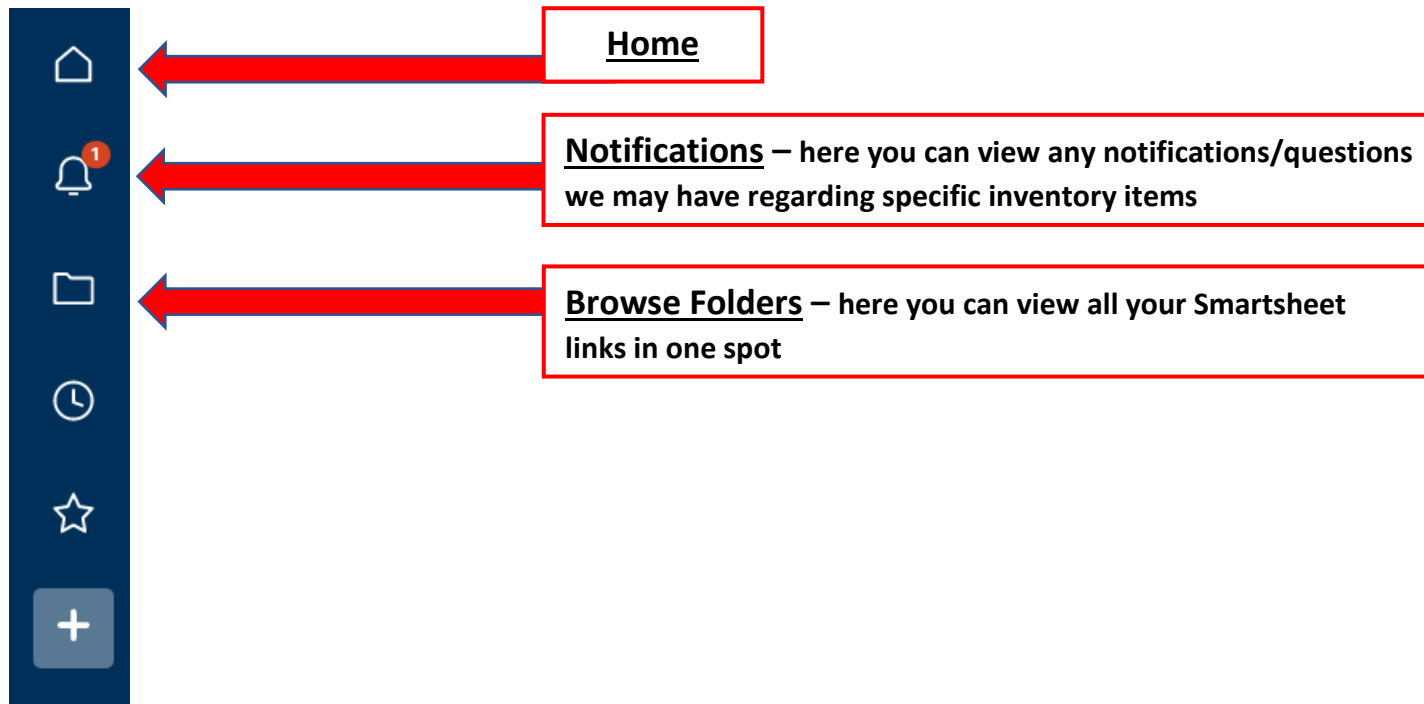
Viewing Your Inventory:

7. You will have access to VIEW and to COMMENT ONLY on the Smartsheets that we have shared with you.

Don't worry – you won't break it - you can't delete anything we have in here. 😊
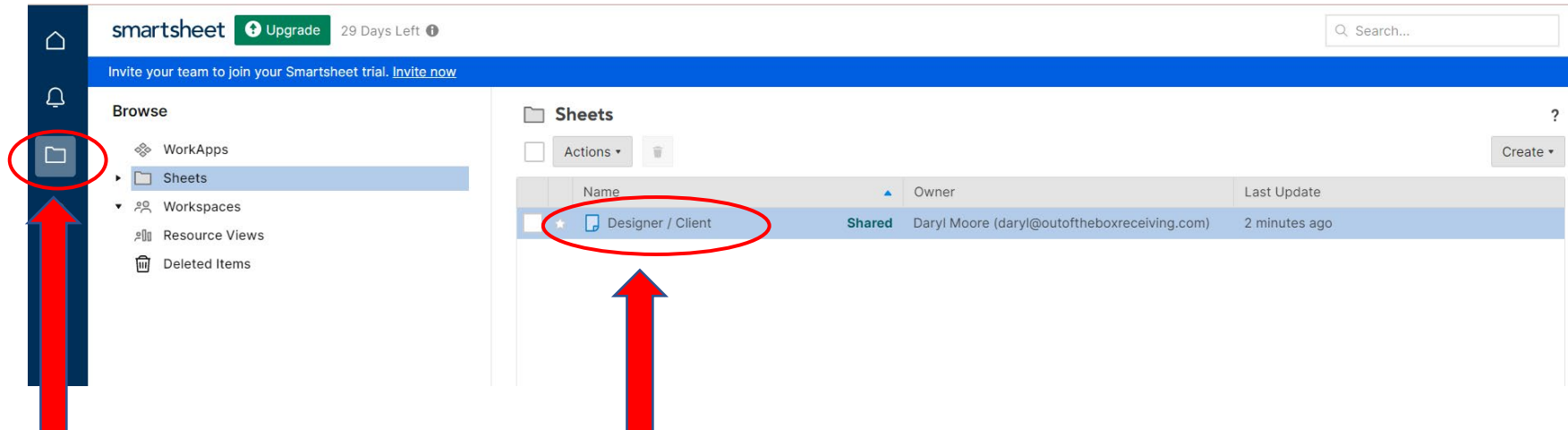
Click on the Folder to <u>view</u> all of your links and pages to individual client inventory.

The individual Smartsheet pages that we have shared with you will ALL show up here, in one place.

You can click on each individual link to view/comment on inventory for your specific Clients.

If you have Unmarked stock items, we may put this in a Main page. For example, we would list this as Daryl / MAIN. In the future, we can move these items to a specific client once we know who that item belongs to.

What Inventory do you have currently?

8. Here you will find all the inventory we have received so far for this particular client/job.

At the top is your Name and your Client.

Therefore, it is important for items to be sidemarked correctly when they are shipped to us.

If you have Unmarked stock items, we may put this in a Main page.

For example, we would list this as Daryl / MAIN. In the future, we can move these items to a specific client once we know who that item belongs to.

You will have access to Comment only on each Smartsheet.

Can I share my link with others? YES!

9. Click on the [👥 Share] **button at the top right to view who has access to individual Smartsheet pages. A window will pop up that looks like this below.**

Here you will find the direct link to this individual Smartsheet that you can share with others (your team members, customers, etc…). We will never share your link with your customers – but you can!

Sheet Sharing

Invite Collaborators

Add people and workgroups

Invite Details ▶

You have the option to Invite Collaborators to view this Smartsheet by adding them individually via email.

Permissions ⓘ

Editor - can share

Collaborators (2) ▼

DM	Daryl Moore (daryl@outoftheboxreceiving.com)	Owner
J	Jessica Free (jessica.free@juneauschools.org)	Commenter
J	jessicafree87@gmail.com	Commenter

Sheet Link ⓘ

https://app.smartsheet.com/sheets/W6GvGjwM5f84cxmMj6V2vFjwGR5f4W8f82MpGpM1 ✉

Default View: None   Edit

Or you can Copy and Paste this link into an email to Share with others.

They will only have permission to view the items on this page.

Close

How do I make a comment?

10. Hover over the lefthand column where the numbers are. Here, you will see icons that look like a paperclip, a folder, and a bell. Click on the folder icon to view or make a comment.

Comments on specific line items can be seen here.

Hover here on the row of the item you would like to make a comment on. Click on the folder to view or make comments.

To add new comments, begin typing here and click enter. Comments can be deleted by hovering over the three dots of the comment. You can tag others in comments by using the @ symbol and typing their email.

SMARTSHEET EXAMPLES – How we inventory your items in Smartsheet. We have organized these into specific categories to make it easier for you to quickly view the inventory we have in our warehouse. This makes viewing specific items easier and faster for everyone.

RUGS:

Item	Quantity	Date	Vendor	Description	Status	Inspected By	Room	Picture 1	Picture 2
RUGS:									
Rug 12x16	1	01-14-22	Couristan inc	Rug 12x16	✓	KS			

LAMPS/ LIGHTING:

Item	Quantity	Date	Vendor	Description	Status	Inspected By	Room	Picture 1	Picture 2	P
LAMPS / LIGHTING:										
Sailaway Lamps	2	9/20	Currey & Co	White with nautical rope	✓	KS	Guest Bedroom 1			
Lampshades for Sailaway Lamps	1	9/20	Currey & Co	22" natural shade	✓	KS	Guest Bedroom 1			

SMARTSHEET EXAMPLES, continued….

ARTWORK / MIRRORS:

Item	Quantity	Date	Vendor	Description	Status	Inspected By	Room	Picture 1	Picture 2
ARTWORK / MIRRORS:									
Fern prints	9	12/17	Jeffan	Fern prints	✅	KS	Living Room		

BEDS / MATTRESSES:

Item	Quantity	Date	Vendor	Description	Status	Inspected By	Room	Picture 1	Picture 2
BEDS / MATTRESSES:									
QUEEN - Gel memory foam mattress	1	10/21	Diamond Distribution; Night & Day Furniture	Tri-fold 6" gel memory foam mattress QUEEN SIZE - rolled up in box	✅	JF	Master		

SMARTSHEET EXAMPLES, continued….

ALL OTHER

FURNITURE:

Item	Quantity	Date	Vendor	Description	Status	Inspected By	Room	Picture 1
ALL OTHER FURNITURE:								
Lily Fog Sofa	3	11/9	Bramble	Cream colored	✅	RH		

We hope you find this Smartsheet guide useful!

Let us know if you need additional Smartsheet Training.

-The OOBR Team

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