smartsheet

Smartsheet is a **spreadsheet-inspired task and work management tool** with **powerful collaboration** and **communication features**. It's ideal for **tracking the workflow process** for every kind of business. Track **assigned tasks**, **due dates**, and **status updates** through **Spreadsheet**, **Gantt**, **Card** and **Calendar views**. **Invite team members and external stakeholders** to the plan sheet for seamless coordination and collaboration. **Attach files** and working documents, and add notes and status details to keep everything related in a central location. Use Smartsheet's powerful collaboration tools to manage **discussions**, **reminders**, and **attachments**, and make changes in real time, from your **desktop, or mobile device**.

The best advocates of Smartsheet, are the customers. Go to: www.smartsheet.com/customers **to hear what customers are saying about Smartsheet.**

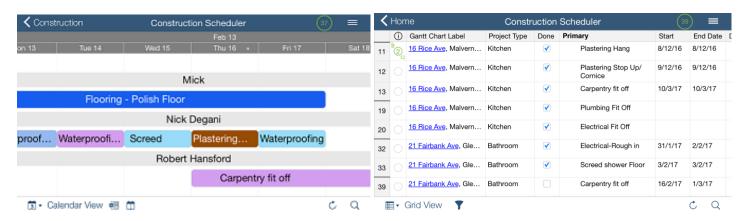## Some examples of how Smartsheet can be applied to your business:

Project Management: Building & Construction

Make your field operations staff (sales, trades, project managers etc.) smile – They will be empowered when they can see and update their work on their smartphone or iPad, download or upload photos and documents, or raise emails relating to tasks/opportunities.

Builders can schedule projects and share the sheet or report with clients so that they are always up to date. Tradespeople can see work assigned to them, add pictures, comments, status updates, and send email updates with all task details including attachments. Set **automatic email Notifications** to tradespeople when they have been assigned a task, or when there are changes to assigned tasks such as date changes.

Resource Management

Project Managers can manage resources through Resource Management.

	6 August 2017					
	S	M	T	W	T	F
▽ Trades						
▷ Craig Branson			100%			
▽ Paula @Chess		200%	100%			
10 Centre Rd Be…		100%	100%	100%		
21 Fairbank Ave,		100%	100%			

👤 Appears against a task where the resource is over allocated to trigger task re-assignment or date changes.

Renovation Punch List

Add Punch List tasks for fixing as you walk through the site. Take and upload photos against tasks, add comments and Assign Tasks.

📎	💬	i	Prio	Done	Task Name	Responsible	Scheduled Date	Hours	Description	Comments
					REMODEL PUNCH LIST					
				☐	▬ **Kitchen**					
			❗	☐	Phone Jack in Kitchen	Bob	02/04/17	.5h	jack not live	
📎	💬			☐	Concrete counter cracks	Bob	05/04/17		cracks at the narrow areas near sinks	
				☑	~~Buff concrete counter stains?~~	~~Bob~~	~~21/04/17~~	~~2h~~	~~stains from pie~~	~~johnson and johnson wax in yellow con~~
			❗	☐	Freezer not freezing	Bob	02/04/17	-	not keeping below 32	
				☑	~~Mud room floor shelf rod~~	~~Bob~~	~~02/04/17~~	~~.5h~~		
				☐	Pantry pulls	Bob	12/04/17			
			⬇	☐	Kitchen deck double doors	Leslie	12/04/17		still sticking (replacing?)	
				☐	▬ **Living Room**					
				☑	~~Sconce~~	~~Jim~~	~~05/05/17~~	~~2/3 done~~		~~one reordered~~
				☐	Wiring through smurf tube	Jim	17/05/17		holes don't line up, can't make the corner when pulling through	
				☐	TV cable live?	Bob	02/05/17		can't seem to get the TV to see the cable feed	Cable service rep coming on the 30th

Project Estimator Sheet

Easily build a quote template with your costings. Filter by relevant room type and begin building your quote.

Work Required	Details	Units	Cost	Kitc…	Kitchen Qty	Kitchen $ Extension	Quote	Supplier	Order Date	Confi…	F & F	Due Da
⊟ **Preliminary**				☑		$1,545.00				☐		
HIA Warranty	Home owners warranty insurance	each	$650.0	☑	1	$650.00				☐		
Plans	Supply architectural working plans and elevations	each	$195.0	☑	1	$195.00				☐		
Permit	Building permit	each	$700.0	☑	1	$700.00				☐		
⊟ **Site Works - Labour**				☑		$1,615.00				☐		
Strip Out	Strip out existing fixtures and fittings, floor & wall tiles	each	$850.0	☑	1	$850.00				☐		
Strip Out (minor)	Strip out existing fixtures and fittings, floor & wall tiles	each	$600.0	☑	1	$600.00				☐		
Brick walls	Remove internal brick wall	m2	$200.0	☑		$0.00				☐		
Timber Walls	Remove internal timber stud wall	m2	$50.00	☑		$0.00				☐		
Asbestos Removal	priced individually	m2	$65.00	☑	1	$65.00				☐		
Window	Remove existing window	each	$100.0	☑		$0.00				☐		

Warranty Tracker

Track warranty work and assign to trades/experts, for viewing and updating on their smartphone or iPad.

			Done	Project/Work Required	Warranty Start Date	Warranty End Date	Responsible For	Scheduled Fix Date	Comments	Time
								i ▾		
			☐	⊟ 16 Rice Ave - Wendy & Gerry Smith	01/11/16	01/11/24				
			✔	paint touch ups due to cracks along si			John Smith	08/02/17		2h
	✉		☐	Kitchen sliding door catching			Frank Whiteho	14/02/17		.5h
			☐	⊟ 21 Fairbank Ave Glen Iris - Max & Sue	16/11/16	16/11/24				
			✔	Kitchen cupboards catching - left of m				12/01/17		10m
			✔	Handle come off laundry Cupboard				12/01/17		10m
			☐	⊟ 26 Rice Ave Camberwell - Robin & Pe	15/12/16	15/12/24				
			✔	Front Sensor Light not working				18/01/17		20m

Sales Pipeline

Collaborate with sales reps and move your highest probability deals to close. Use this template to view and track key info on each opportunity, including rep, estimated deal value, close date, sales stage and status, contact info and next steps. Schedule Reminder Notifications for Next Steps.

			Do...	Opportunity	Prio	Customer Contact	Sales Stage	Rep	Estimated Value	Expected Close Date	Probabi...	Next Step	Next Step Date	Produc
								🔒						
			☐	⊟ High Probability: 1					US$55,00(					
	💬		☐	⊟ National Freight	!	Harvey Sim	Closed	Paula-Ch	US$55,000	12/07/17	75%	Resolve co		Globa
			✔	Drop Samples		Harvey Sim		Paula-Ch					22/03/17	
			☐	Follow Up Call		Harvey Sim		Paula-Ch				Call	23/03/17	All Pro
	💬		☐	Arrange Product Presentation		Harvey Sim		Paula-Ch					13/04/17	
			☐	Testing		Harvey Sim		Paula-Ch						
			☐	⊟ Medium Probability: 2					US$90,00(					
📎	💬		☐	Tropic Ranger		Jullia Scole	Quote	Bob	US$90,000	09/05/17	50%	Provide Re		Logist
			☐	BuildCo		Jullia Scole	Prospectin	Paula-Ch						
			☐	⊟ Low Probability: 1					US$64,00(					
			☐	Queens Mass Moving		Tipper Men	Quote	Jim	US$64,000	09/06/17	25%	Talk with Cr		Track

Consulting Hours

Track hours worked against Clients and tasks.

Billed	Client	Staff	Labor / Materials	Date	Work Performed	Non-Billa... Hours	Billable Hours	Hourly Rate	Total Billable	Inv #	Comments
								🔒	🔒		
☐					⊟ Design Melbourne	1.5	4.0		$400		
✔	Design Melbourne	Paula-C	Labor	12/04/17	Smartsheet Training: Scheduler project creation and retiring to completed sheet. Workspace creation. Leave Planner creation.		4	$100	$400	1832	
☐	Design Melbourne	Paula-C	Labor	20/04/17	Creation of Maintenance Punch List & Report. Shared & emailed explanation of use.	1.5		$100	$0		
☐									$0		
☐					⊟ Kitchen King	0.0	20.5		$2,050		
✔	Kitchen King	Paula-C	Labor	28/03/17	Data & processes analysis & Smartsheet template creation		4.0	$100	$400	1833	
✔	Kitchen King	Paula-C	Labor	30/03/17	Smartsheet Configuration with Anita		4.5	$100	$450	1833	
✔	Kitchen King	Paula-C	Labor	13/03/17	Smartsheet Training & Config with Anita		5.0	$100	$500	1836	
☐	Kitchen King	Paula-C	Labor	06/04/17	Adding data for demonstration / Configuration		4.0	$100	$400		

Event Management

Simplify registration for any event with this web form. Customise and embed in a web page, or email as a link. New entries from the form automatically appear in your sheet that you can share with your team for follow-up.

			Name	Status	Email	Package Level	Arrival Date	Reconfirmed Registration	Owner	Modified	Comments
			Sally Smith	●	Sally@example.com	Silver	06/26/14	✓	Chris	01/02/14 4:43 PM	Comments or q
			Chris Jones	●	Chris@example.com	Gold	06/19/14	✓	Nick	01/02/14 4:43 PM	Comments or q
			David Lead	●	David@example.com	Bronze	08/29/14				
			John Chris	●	John@example.com	Silver	08/17/14				
			Jodi Jones	●	Jodi@example.com	Gold	08/15/14				
			Sue Green	●	Sue@example.com	Gold	06/19/14				
			Bill Mathews	●	Bill@example.com	Silver	08/29/14				

Event Registration Form
Please provide details for your registration.

Name *

Contact Management

Track your customers or company contacts information. Add a symbol for any key contacts. Add discussion comments and attachments to companies and/or contacts.

			Call	Company/…	Primary	First Name	Last Name	Title	Email	Office Phone	Mobile	Comments
			⚑	Acme Co.	☆		Acme Co.					
			⚑	Acme Co.	★	Susan	Chernoff	CEO	susan@example.co	508-422-3000 x12		
💬 🔔		⚑	Acme Co.	☆	Henry	Blaisdell	VP Finance	henry@example.cc	508-422-3000 x17		
			⚑	Acme Co.	☆	John	Manly	VP Sales	john@example.com	508-422-3000 x22	508-422-6784	
			⚑	Acme Co.	☆	Amy	Wilson	VP Marketing	amy@example.com	508-422-3000 x5		
			⚑		☆		New Horizons					
📎 💬		⚑	New Horizon	★	Sam	Shelby	CEO	sam@example.com	310-555-1212	310-555-1216	Assistant: Annie
			⚑	New Horizon	☆	Ann	Donovan	CFO	ann@example.com	310-555-1212		
			⚑		☆		Smith Corp					
			⚑	Smith Corp	★	Gretchen	Ellis	President	gretchen@example.	212-555-1212		

Hot	Date	Contact Log	Company	Logged By	Client Contact	Client Dept	Sched Date	Action	Comments	Main Con
⚑		JRT Distribution								1300 111
⚑	30/11/14	PO received -- attached	JRT	Paula Man	Susan Chern	Purchasing		Email In		
⚑	27/11/14	follow up call; will send PO	JRT	Perry	Susan Chern	Purchasing		Call Out		
⚑		sent quote	JRT	Perry	Susan Chern	Purchasing	30/03/17	Email Out		
⚑		New Horizons								13 13 11
⚑	29/11/14	Box 5 damaged in transit; need new. Will ship today, next day air.	New Horizon	Ollie	Sam Shelby	Receiving		Call In		03 9696 0
⚑	08/11/14	Called Amy in A/P to discuss delinquent invoice	New Horizon	Lauren	Amy Wilson	Accounts		Outbound C		
⚑		Synergy Systems								03 9555 0
⚑	28/03/17	Samples Sent	Synergy Syst	Paula-Che:	Oliver McDor	Exec				
⚑		Sample Follow Up call	Synergy Syst	Paula-Che:	Oliver McDor	Exec	28/04/17	Call Out	Customer might	03 9555 0

Meeting Agenda, Attendance and Follow-Up

Manage meetings more productively with a simple meeting agenda that tracks goals, timing, follow-up action items, and attendees. Use the sheet to run your meeting, keep everyone on topic and accountable for follow-ups. Set up automatic Reminders to action owners on action items to follow up.

			Do…	Meeting topic	Time Allow…	Description	Owner	Action Comments
			☐	**Major Projects Meeting Minutes**				
			☐	**Meeting Date 13/02/17 at 10am**				
				Meeting Agenda		**Description**	**Owner**	
📎	💬	🔔	☑	Agenda Item 1	10min	Description	Jess Smart	
			☑	Agenda Item 2	10min	You can make this a wrap column if you wish	Othername@example.com	
			☐	Agenda Item 3	10min		Chris@example.com	
				Actions for Follow-up		**Due Date**	**Owner**	
			☐	Action Item 1		13/06/17	Chris@example.com	
			☐	Action Item 2				
				Attendees		**Department**	**Email Address**	
			☑	Chris Landstrom		Marketing	Chris@example.com	
			☐	Other Name		IT	Othername@example.com	
			☐	**Project Falcon Status Mtg Minutes**				
			☐	**Meeting Date 15/02/17 at 9am**				

Human Resources

Organise all your key employee information in one, always current resource you can access from anywhere. Use with your HR team to track confidential details and documents, or share a simple version as a shared employee directory.

			Employee Picture	Employee Name	Title	Date of Hire	Home Address	Telephone	Employment Status
📎				Steve Green	Sr Finance Manager	03/02/15	15 Elm St, Bellevue, WA 98005	425-256-1234	Full Time
				Tyler Miller	Finance Executive	27/02/14	262 Skid St, Kirkland, WA 98033	425-374-8264	Part Time

Leave Request/Calendar

Keep everyone in the loop by sharing leave or out-of-office schedules and plans for staff leave with your entire team. View as a Gantt timeline or as a Calendar. **Resource management indicators will alert you if a staff member is allocated or over-allocated (more than 100%) to a Task that day.** Clicking on the **'red head'** indicator will take you to the sheet/s and task/s already allocated to that day - It may show that they have Annual Leave assigned on this day.

			Employee	Employee Contact List	Leave Type	Leave Days	Start Date	End Date	Comments
			Paula Mandile			**5**	07/08/17	10/08/17	
	♟		Paula Mandil	Paula-Chess Ma	Annual	5	07/08/17	10/08/17	O/S Holiday
			Mary Ciccaro			**11**	**14/02/17**	**27/04/17**	
			Mary Ciccar		Sick	3	14/02/17	16/02/17	Measles
			Mary Ciccar		Annual	4	20/02/17	23/02/17	Not contactable - Overseas
	💬		Mary Ciccar		Annual	4	24/04/17	27/04/17	
			John Bliven			**17**	**17/01/17**	**27/12/17**	
			John Bliven		Parental	2	26/12/17	27/12/17	New baby girl - Olivia
			John Bliven		Annual	8	17/01/17	26/01/17	
	💬		John Bliven		Compassionate	7	01/02/17	09/02/17	Mother passed away
			Jerry Parker			**3**	01/02/17	27/12/17	
			Jerry Parker		Annual	2	26/12/17	27/12/17	
			Jerry Parker		Annual	1	01/02/17	01/02/17	

February 2017

◁ | 1 Month ▾ | ▷

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
January 29	30	31	February 1	2	3
			Jerry Parker out	John Bliven out	
5	6	7	8	9	10
		John Bliven out			
12	13	14	15	16	17
			Mary Ciccaro out		
19	20	21	22	23	24
		Mary Ciccaro out			

Expense Reporting

Easy expense tracking, perfect for team members on-the-go. Open the sheet on your mobile device, enter a new expense, and snap a photo of the receipt to attach to the row. Share with your manager for approval and accounting department for processing.

		i	Date	Description	Expense Category	Amount	Manager Approve	Status
						🔒		
				Kerry Johnson				
				Expenses: Kerry Johnson	**Oct 2014**	**$1,290.60**	☐	
	📎		10/02/14	Big Box Electronics - new travel laptop	Hardware	$669.98	☑	
	📎		10/02/14	Airline - SEA-SFO Ticket #Y33MUZ4	Airfare	$254.90	☑	
	📎	💬	10/15/14	Washington Hotel, 1 night for client meeting	Hotel	$354.72	☑	
	📎	📍	10/21/14	Trade Center Parking	Parking	$11.00	☐	

Order Tracking

Improve customer service and transparency, and reduce service calls with this secure, always-current order status and account statement. Start a new row for each order, then attach orders, invoices, shipping details, and payment info.

		i	PO	PO Date	Ship Date	Shipped Via	Invoice Amount	Invoice Number	Inv Date	Terms	Paid	Date Paid	Payment	Cheque #
							Account Balance							
	🔒		⊟ Customer Name	Customer Account #			-US$1,569.50	Customer Address and Contact Info						
	🔒		⊟ 3 Orders				US$4,530.00						US$2,960.	
	📎		example order #1	02/29/17	02/03/17	UPS Ground	US$598.00	invoice #	02/03/17	Net 30	☑	26/03/17	US$598.0	7531
	📎		example order #2	15/03/17	15/03/17	UPS Ground	US$2,362.50	invoice #	15/03/17	Net 30	☑	06/04/17	US$2,362.	7624
	📎	💬	example order #3	08/04/17	09/04/17	UPS 2nd Day Air	US$1,569.50	invoice #	09/04/17	Net 30	☐			
			⊟ Customer Name 2	Customer Account #			-US$1,400.00	Customer Address and Contact Info						
			⊟ 2 Orders				US$2,200.00						US$800.0	
			example order #1	02/29/17	02/03/17	UPS Ground	US$800.00	invoice #	02/03/17	Net 30	☑	26/03/17	US$800.0	7531
			example order #3	08/04/17	09/04/17	UPS 2nd Day Air	US$1,400.00	invoice #	09/04/17	Net 30	☐			

Asset Management

Track assigned location, condition, and value of equipment, computers, or other assets. For each item, attach photos of asset and tracking ID, set alerts for end of life, and attach or link to purchase and loan details. Upload photos and attachments.

Asset or Serial #	Condit...	Description	Location	Assigned To	Vendor	Bank Loan?	Purchase Date	Expected Life (Years)	Asset End Date	Months To Replace	3 Month End Alert	Pur Pric
									🔒	🔒	🔒	
		Asset Manager with Depreciation										
⊟ **Equipment**												
VIN01634567	🟢	Cat Loader	Home Office	Pool	Local	☑	16/12/16	8	14/12/24	95.1	15/09/24	U:
VIN98761634	🟢	Deere Backhoe	Home Office	Pool	Local	☑	13/01/15	8	11/01/23	71.7	13/10/22	U:
⊟ **Computers**												
4567	🟡	HannsG HK241DPB 24" LCD Monitor - 108	Subsidiary	J Williams	Local	☐	04/02/16	4	03/02/20	35.9	05/11/19	
⊟ **Furniture**												
F-1638	🔴	Two-Drawer Lateral Files, 30" W	Subsidiary	Z Parini	Non-Local	☐	21/03/14	5	20/03/19	25.2	20/12/18	U

Inventory Management

Check inventory levels, make order requests, and see re-order history in one sheet. Check quantities on your mobile device, set an alert for low quantities, and track status of resupply orders.

Item Number	Inventory Item	Vendor	Stock Check Date	In Stock	Unit Price	Inventory Value	Par Level (Reorder)	Qty Above / Below Par	On Order	Vendor SKU	Last Order	Receiv... / Resto...	Ordered By	Unit Cost
	⊟ Current Inventory					US$11,7								
CC-2008	Chocolate Chip	Confectioner United	25/04/17	998	US$3.	US$2,994	1,000	-2	☑					
G-2010	Gingerbread	ABC Cookies	25/04/17	3,211	US$2.	US$8,028	1,000	2,211	☐					
PB-2007	Peanut Butter	Sweets R Us	25/04/17	231	US$3.	US$693	500	-269	☑					
	⊟ Order History													
CC-2008	⊟ Chocolate Chip	Confectioner United												
	Chocolate Chip	Confectioner United							☑	CO-CHCH	25/04/17		Louise	US$1.2
G-2010	⊟ Gingerbread	ABC Cookies												
									☐	ABC123	27/03/17	03/04/17	Caroline	US$1.1

Basic Agile Project with Gantt Timeline

Manage projects with Agile methodology through Smartsheet.

⊟ AGILE PROJECT			56.5d	28/03/17	14/06/17	32%		
⊟ Sprints			56.5d	28/03/17	14/06/17	32%		
⊟ Sprint 1		36	50.5d	28/03/17	06/06/17	36%		
⊟ Feature 1	Security	8	1d	28/03/17	28/03/17	100%	1	Team 1
Task 1			1d	28/03/17	28/03/17	100%		
⊟ Feature 2		5	8d	03/04/17	12/04/17	50%	1	Team 2
Task 1			4d	03/04/17	06/04/17	50%		
Task 2			4d	07/04/17	12/04/17	50%		

Helpdesk Ticket Tracker

Capture Helpdesk Requests via a Web form, 'send updates' to customers to keep them in the loop.

Issue	Date	Username	Departm...	Ticket Category	Urgency	Ticket ID	Technician	Status	Initial Action	Date Closed	Created
Info from customer-submitted web form								Section f			
⊟ Level 1 - URGENT [1]											
My PC isn't working. It keeps giving me the error message shown in the attached file.	05/07/17	Janine Lass	Finance	Hardware	1 - URGENT I'	HD-104	Bob Smith	Pending			
⊟ Level 2 - Inconvenienced [1]											
My PC is really really slow. I swear I didn't download anything new, it just ground to a snail's pace today.	02/07/17	Ed Fester	Marketing	Software	2 - I'm Inconve	HD-106	Staff	Pending			
⊟ Level 3 - Can Wait [1]											
MS Project crashing on my PC	02/07/17	Rachel	Sales and M	Software	3 - I can wait	HD-108	Jim	Working			
⊟ Closed [1]											
Printer isn't working	02/07/17	Jimmy Cha	Marketing	I don't know	1 - URGENT I'	HD-110	Bob Smith	Almost			
New Form Submissions Appear Below											
Laptop crashed and won't boot anymore. No sounds, no lights, no noises.	02/07/17	Bo Sanders	Sales	Hardware	1 - URGENT I'	HD-112					

Help Desk Ticket Tracker
Submit your request for help.

Issue *

Date *

Username *

Department

Ticket Category
○ Hardware
○ Software
○ Other
○ I don't know

Urgency *

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