

Setting Yourself Up to Achieve Activity



By the end of this activity, you will be able to:

- Find a template in the solution center
- Favorite a Smartsheet item
- Delete and recover a Smartsheet item
- Setup your Smartsheet contacts
- Complete your personal settings



Follow these steps to download the activity assets

No activity sheets are needed to complete this activity

Tasks to complete

Navigation, Solution Center, Favorites, Recently Opened, Deleted Items

- ☐ Log in to your **Smartsheet Account**
- ☐ Navigate to the **Solution Center** (+ icon in the left panel. If you can't see it, select the hamburger menu in the top left corner)
- ☐ Search for the **Marketing Shared Services template set**
- ☐ Select **Learn more** and then **Get Template Set Now**
- ☐ In the template set folder, **favorite the Marketing Shared Services dashboard**
- ☐ In the Reports folder, **delete the Creative Services Completed report**
- ☐ Go to your deleted items and **undelete the Creative Services Completed report**
- ☐ Find the Creative Services Completed report in your sheets folder and **drag and drop it back into the Reports folder** of the Template Set - Marketing Shared Services folder
- ☐ Open the **Template Set - Marketing Shared Services > Sheets folder**
- ☐ Open the **Creative Services - Request Tracker sheet**
- ☐ Navigate to your **recently opened items** (hamburger menu in the top left corner and then select the clock icon)
- ☐ **Pin the Creative Services - Request Tracker** (hover over the sheet in the Recently Opened panel and select the Pin icon)

Personal Settings & My Smartsheet Contacts

- ☐ Select your **profile picture** in the top right
- ☐ Select **Personal Settings** from the menu
- ☐ Fill in as much information as you'd like on the **Profile Tab**
- ☐ Select **Settings**
- ☐ Select and adjust your **auto-save settings**
- ☐ Adjust your **communication preferences, time zone, and regional preferences**
- ☐ Select **Notifications**
- ☐ Adjust your **notification settings**
- ☐ Select **Save**
- ☐ Select your **profile picture** in the top right
- ☐ Select **My Smartsheet Contacts**
- ☐ Add any contacts that you will collaborate with on a regular basis. Remember, you don't need to add contacts that are already part of your account and were added by your system administrator.

Great job! You reached the end of the activity!