



## Installation and Customization Guide

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# Introduction

Smartsheet gives your organization an intuitive and collaborative spreadsheet-style tool for managing projects internally as well as externally with clients or partners.

When Smartsheet is integrated with Salesforce, users can link project sheets to accounts, contacts, opportunities, other CRM objects or any custom object for real-time collaboration on project tasks and related files and discussions.

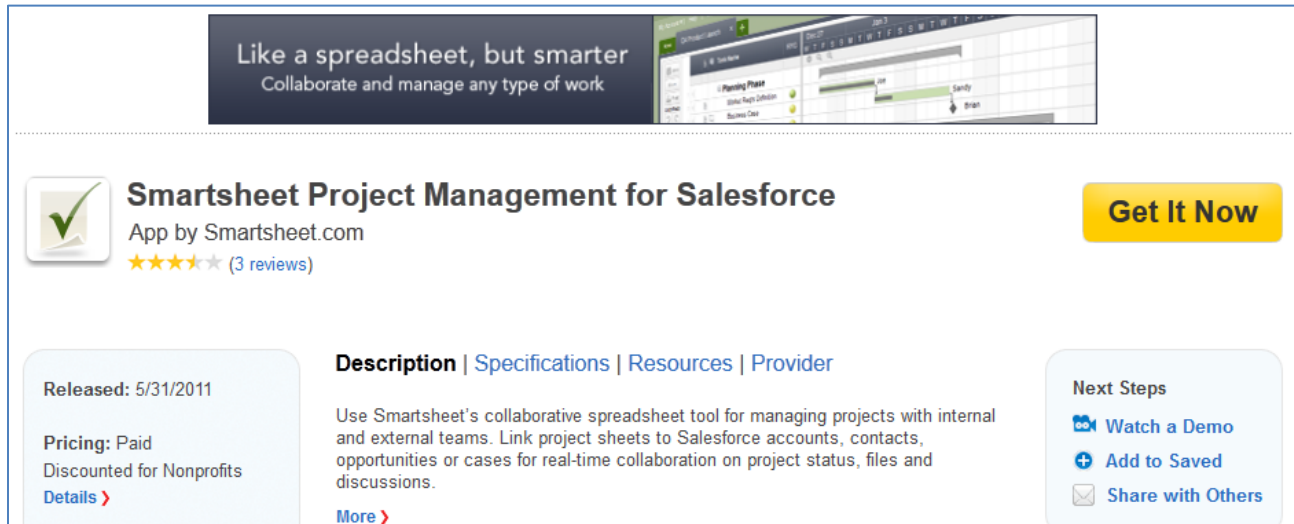
This document provides step-by-step instructions for the installation and customization of Smartsheet to enable integration within your Salesforce environment.

# Getting the Smartsheet Application from AppExchange

First, you need to get the Smartsheet application from Salesforce.com's AppExchange.

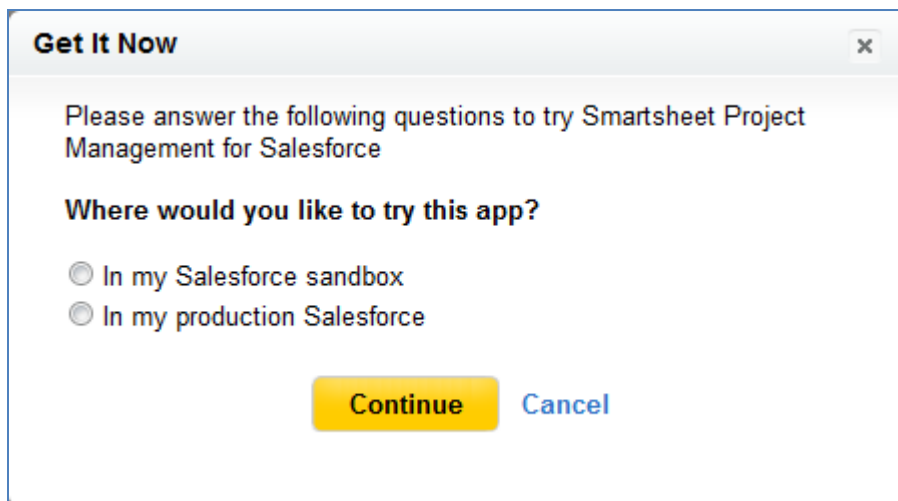
1. Go to the Smartsheet listing on Salesforce.com's AppExchange:

<http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JSACEA4>



The screenshot shows the AppExchange listing for "Smartsheet Project Management for Salesforce". At the top, a banner reads "Like a spreadsheet, but smarter" and "Collaborate and manage any type of work". Below this, the app icon (a green checkmark) is shown next to the app name "Smartsheet Project Management for Salesforce" and "App by Smartsheet.com". A "Get It Now" button is in the top right. The app has a 4-star rating from 3 reviews. Below the app name, there are tabs for "Description", "Specifications", "Resources", and "Provider". The "Description" tab is active, showing a brief overview of the app's functionality. To the left of the description, there is a "Released" date (5/31/2011) and "Pricing" information (Paid, Discounted for Nonprofits). To the right, there are "Next Steps" including "Watch a Demo", "Add to Saved", and "Share with Others".

2. Ensure you are logged in with your Salesforce administrator account, using the **Login or Register** button in the page header.
3. Click **Get It Now**.



The screenshot shows a "Get It Now" dialog box. It contains the text "Please answer the following questions to try Smartsheet Project Management for Salesforce". Below this, the question "Where would you like to try this app?" is displayed. There are two radio button options: "In my Salesforce sandbox" and "In my production Salesforce". At the bottom, there are two buttons: "Continue" (yellow) and "Cancel" (blue).

4. Select if you would like to install the Smartsheet application in your Production or Sandbox Salesforce environment, then press **Continue**. The **Confirm Installation** page appears.

### Confirm Installation

**Smartsheet Project Management for Salesforce**  
App by Smartsheet.com

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

#### Installation Instructions

Thank you for your interest in installing Smartsheet Project Management for Salesforce. Please take the following steps to install this application:

1. Review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.
2. Review the application and subscription information to understand what you are installing.
3. Review the organization and user information to ensure that you are installing this application in the right environment.
4. Read and agree to the terms & conditions.
5. Click the Install button to start the installation process.

#### What You Are Installing

<b>Package:</b>	Smartsheet Project Management for Salesforce
<b>Version:</b>	Smartsheet Project Management (Smartsheet Integration / 1.5.0)
<b>Subscription:</b>	Free
<b>Duration:</b>	Does Not Expire
<b>Number of Subscribers:</b>	Site-wide

#### Where You Are Installing

<b>Organization:</b>	Smartsheet.com
<b>Edition:</b>	Enterprise Edition
<b>User Name:</b>	salesforce.admin@my.domain.com ( <a href="#">Logout</a> and try again as a different use)

☐ I have read and agree to the [terms & conditions](#).

Cancel

Install

5. Read and accept the terms and conditions, and then click **Install**. The **Package Installation Details** page appears.

## Package Installation Details

[Help for this Page](#) ?

<b>Package Name</b>	Smartsheet Project Management
<b>Version Name</b>	Smartsheet Integration
<b>Version Number</b>	1.5
<b>Publisher</b>	Smartsheet.com
<b>Description</b>	Use Smartsheet's intuitive collaborative spreadsheet tool for managing projects with internal and external teams. Link project sheets to Salesforce accounts, opportunities, other CRM objects, or any custom object for real-time collaboration on project status, files and discussions.

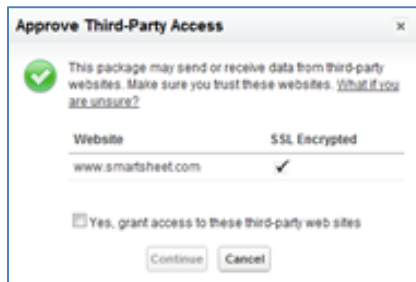
Continue

Cancel

# Installing the Smartsheet Application

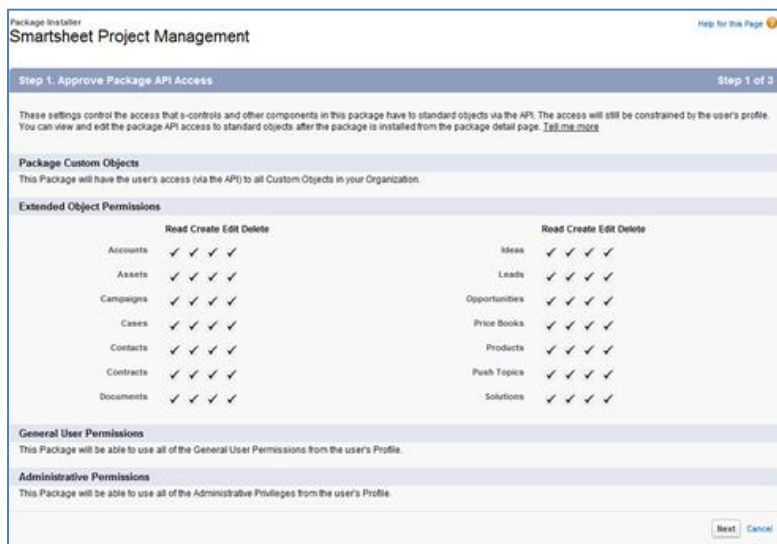
The following steps explain how to install the Smartsheet application from AppExchange.

1. Launch the Smartsheet application package from AppExchange by clicking **Continue**. The **Approve Third-Party Access** window appears.

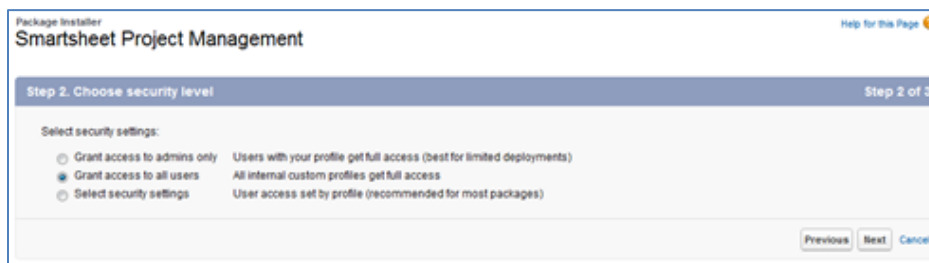


NOTE: This window does not appear if you are upgrading an earlier version of the Smartsheet application package.

2. Select the **Yes, grant access to these third-party web sites** option, and then click **Continue**. The **Step 1: Approve Package API Access** page appears.



3. Click **Next**. The **Step 2: Choose security level** page appears.



4. Select the **Grant access to all users** option, and then click **Next**. The **Step 3. Install Package** page appears.



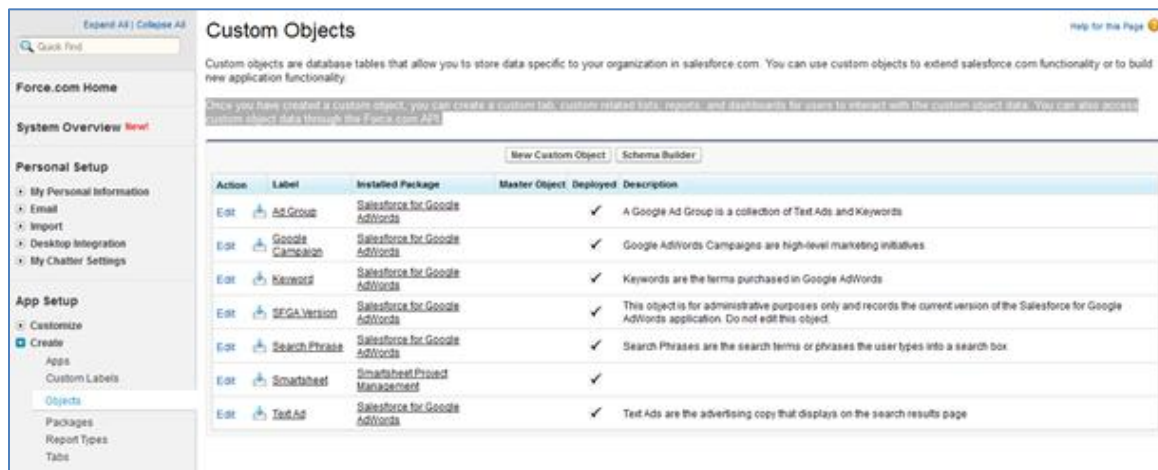
5. Click **Install**.  
NOTE: If you want to test or customize the Smartsheet Integration package before it is visible to end users, go to **Setup > Create > Objects** and click **Edit** next to the Smartsheet object. Under **Deployment Status**, click **In Development**, and then click **Save**. This prevents users who are not administrators from seeing the Smartsheet Integration features until you return and change the deployment status to **Deployed**. However, as an administrator, you will be able to see the Smartsheet object and related pages, and perform the necessary customization steps in the remainder of this document.

# Adding Custom Field Relationships to Smartsheet

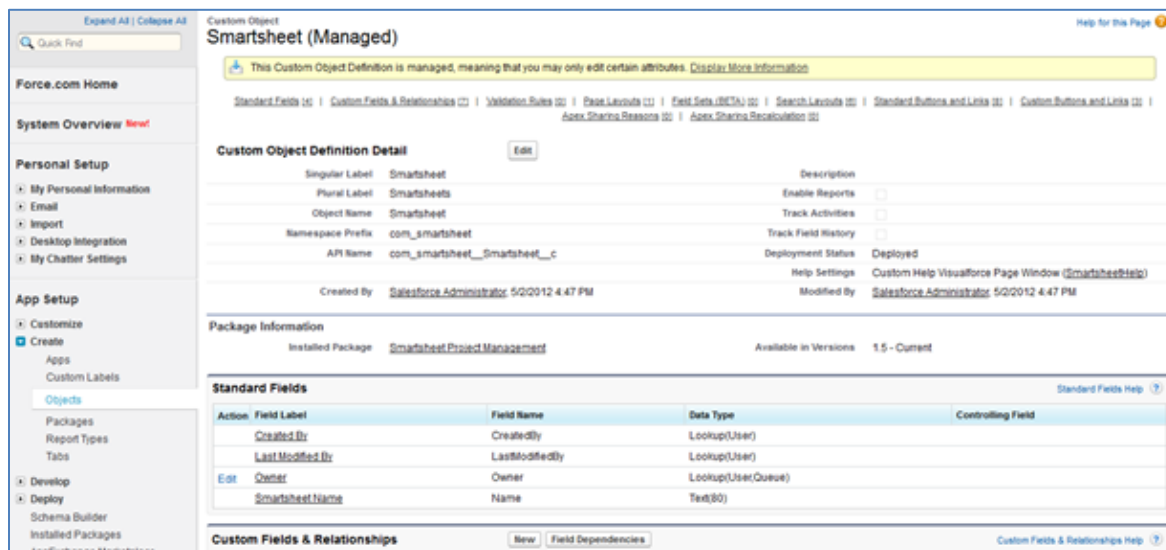
Next, you must create a relationship between the Smartsheet object and other objects within Salesforce.com. This allows you to have a Smartsheet related list on another object.

NOTE: You can skip this section if you want to relate Smartsheets only to the standard Account, Opportunity, Contact, or Case objects. The ability to link a Smartsheet to these objects is included by default.

1. Go to **Setup > Create > Objects**. The **Custom Objects** page appears.



2. Click **Smartsheet**. The detail page for the **Smartsheet** object appears.





3. Under **Custom Fields & Relationships**, click **New**. The **Step 1. Choose the field type** page appears.

The screenshot shows the 'New Custom Field' page in SmartSheet. The page has a header with 'SmartSheet' and 'New Custom Field'. Below the header is a blue bar with 'Step 1. Choose the field type' and a 'Next' button. The main content area is titled 'Specify the type of information that the custom field will contain.' and 'Data Type'. There are several radio button options: 'None Selected', 'Auto Number', 'Formula', 'Roll Up Summary', 'Lookup Relationship' (which is selected), 'Master-Detail Relationship', 'Checkbox', 'Currency', and 'Date'. Each option has a description of its functionality.

4. Click the **Lookup Relationship** option, and then click **Next**. The **Step 2. Choose the related object** page appears.

The screenshot shows the 'New Relationship' page in SmartSheet. The page has a header with 'SmartSheet' and 'New Relationship'. Below the header is a blue bar with 'Step 2. Choose the related object' and buttons for 'Previous', 'Next', and 'Cancel'. The main content area is titled 'Select the other object to which this object is related.' and 'Related To'. A dropdown menu is open, showing a list of objects: 'None', 'Account', 'Ad Group', 'Asset', 'Business Hours', 'Campaign', 'Case', 'Community', 'Contact', 'Contract', 'Google Campaign', 'Idea', 'Keyword', 'Lead', 'Opportunity', 'Product', 'Search Phrase', 'SFGA Version', 'SmartSheet', and 'Solution'. The 'None' option is currently selected.

- From the **Related To** list, choose the object to which you want to link Smartsheets, and then click **Next**. The **Step 3. Enter the label and name for lookup field** page appears.

NOTE: In this example, we will use the **Product** object.

The screenshot shows the 'New Relationship' page in Smartsheet, specifically Step 3 of 6. The page title is 'New Relationship' and the step indicator is 'Step 3 of 6'. The step description is 'Step 3. Enter the label and name for lookup field'. There are three input fields: 'Field Label' with the value 'Product', 'Field Name' with the value 'Product', and 'Child Relationship Name' with the value 'Smartsheets'. There are also empty fields for 'Description' and 'Help Text'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

- Fill in the **Field Label**, **Field Name**, and **Child Relationship Name** fields, and then click **Next**. The **Step 4. Establish field-level security for reference field** page appears.

NOTE: It is recommended that you use the default values, which are the object name for the field label and field name, and **Smartsheets** for the child relationship name.

The screenshot shows the 'New Relationship' page in Smartsheet, specifically Step 4 of 6. The page title is 'New Relationship' and the step indicator is 'Step 4 of 6'. The step description is 'Step 4. Establish field-level security for reference field'. The page displays the field information from Step 3: Field Label: Product, Data Type: Lookup, Field Name: Product, and Description. Below this, there is a table for 'Field-Level Security for Profile' with columns 'Visible' and 'Read-Only'. The table lists various user profiles and their security settings.

Field-Level Security for Profile	Visible	Read-Only
Chatter Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Dude	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - One App User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User - Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

7. Choose the appropriate field-level security for your new lookup field, and then click **Next**. The **Step 5. Add reference field to Page Layouts** page appears.

Smartsheet  
New Relationship

Step 5. Add reference field to Page Layouts

Field Label: Product  
Data Type: Lookup  
Field Name: Product  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Smartsheet Layout

NOTE: This step and the screenshot above only appear for the Enterprise Edition or higher.

8. Confirm the default settings, and then click **Next**. The **Step 6. Add custom related lists** page appears.

Smartsheet  
New Relationship

Step 6. Add custom related lists

Field Label: Product  
Data Type: Lookup  
Field Name: Product  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Product Layout

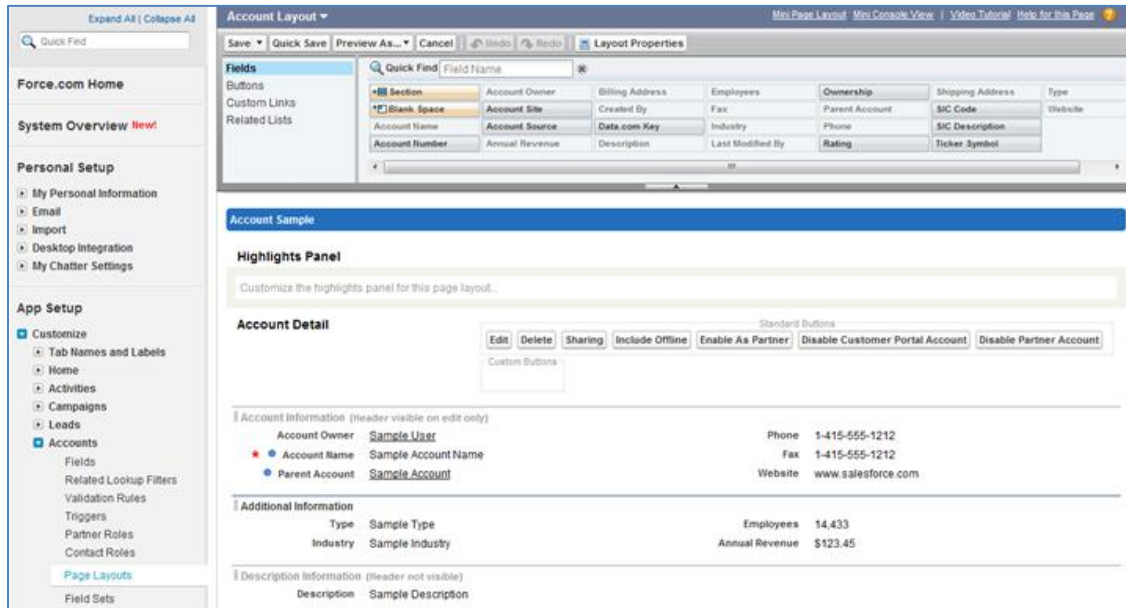
☒ Append related list to users' existing personal customizations

9. Accept or change the default related list label of **Smartsheets**, and then click **Save**. You have now enabled the linking of Smartsheets to the selected object.
10. Repeat steps 1-9 for each additional object where you want to add a Smartsheets related list.  
NOTE: As mentioned earlier, this is not necessary for the Account, Opportunity, Contact, or Case objects.

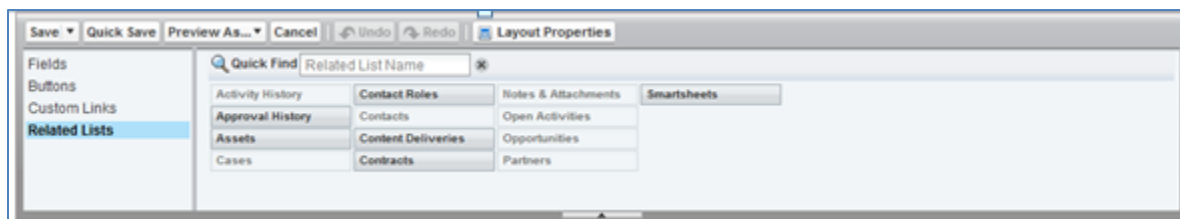
# Adding Smartsheet Related Lists

Use the steps below to add a Smartsheets related list to the page layout(s) for standard Salesforce objects or for custom objects.

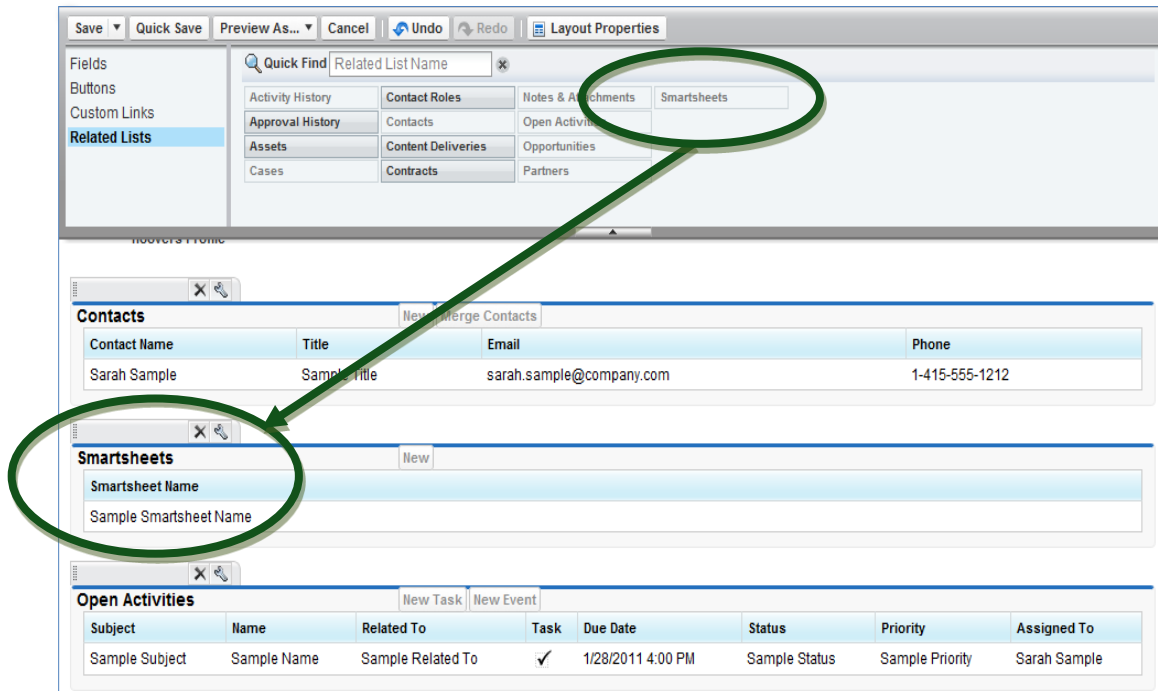
1. For a standard Salesforce object, go to **Setup > Customize > Accounts > Page Layouts**. Click **Edit** next to the page layout you want to change (e.g. Account (Sales) Layout).
2. For a custom object, go to **Setup > Create > Objects** and click on the label for your custom object. In the **Page Layouts** section, click **Edit** next to the page layout you want to change.




3. Click **Related Lists** on the left side of the page header.

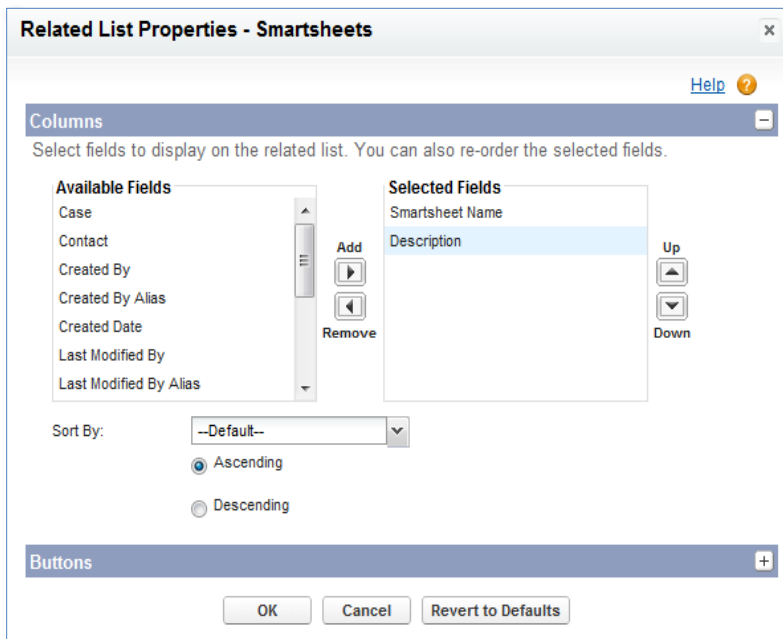


4. Drag the **Smartsheets** related list from the list picker in the page header to an appropriate place in your page layout (e.g., between Contacts and Open Activities).

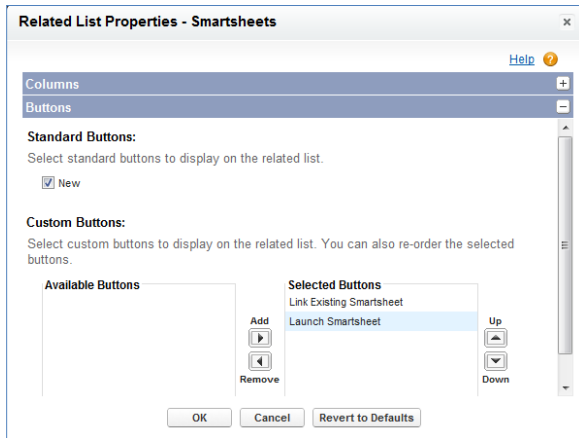


NOTE: If the Smartsheets related list is already in the page layout, just click on the Smartsheets list in the list picker to scroll to the list in the page layout.

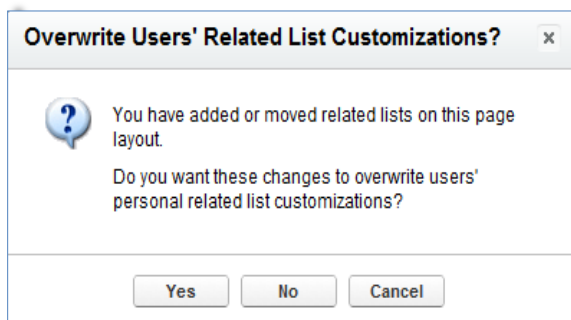
5. In the page layout, click on the wrench icon  next to the Smartsheets list you just dragged.
6. In the **Available Fields** list, click **Description**, and then click the Add button (right arrow) to add it.



7. Click the + (plus) icon on the right side of the **Buttons** section to expand the Button properties. Click **Link Existing Smartsheet** and **Launch Smartsheet** from the **Available Buttons** list, and then click the Add button (right arrow). Click the **Launch Smartsheet** button in the **Selected Buttons** list, then click the Down button (down arrow) to move it after the **Link Existing Smartsheet** button. Then click **OK**.



8. Click **Save**.
9. You may be prompted to overwrite users' personal related list customizations. Select **Yes** if you want the users to see the new Smartsheets related list you just added.



NOTE: If you answer **No**, users who have customized their related lists must manually add the Smartsheets related list.

10. Repeat steps 1-9 for each page layout where you want to enable Smartsheet integration.

# (Optional) Adding Smartsheet to the Home Page

This is an optional step that gives your users an easy way to open Smartsheet by adding a **Launch Smartsheet** link to their Home Page sidebar.

1. Under **Setup**, select **Customize > Home > Home Page Layouts**.

The screenshot shows the 'Home Page Layouts' page in Salesforce. On the left, the 'App Setup' sidebar is expanded to 'Home' > 'Home Page Layouts'. The main content area is titled 'Home Page Layouts' and includes a description: 'This page allows you to create different tab layouts for the Home Tab.' Below this is a table of page layout assignments. The table has columns for 'Action', 'Name', 'Created By', and 'Last Modified By'. One entry is visible: 'Dashboard Home Page Default' created by 'Salesforce Administrator' on 1/20/2011 2:15 PM. Above the table is a search bar with letters A-Z and an 'All' button. Below the table is another identical search bar.

Action	Name	Created By	Last Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Dashboard Home Page Default	Salesforce Administrator, 1/20/2011 2:15 PM	Salesforce Administrator, 1/25/2011 3:03 PM

2. Click **Edit** next to the home page layout you want to change.
3. Select the checkbox for Smartsheet, and then click **Next**.

The screenshot shows the 'Edit Home Layout' page, Step 1 of 2. The title is 'Edit Home Layout'. Below the title is a section 'Step 1. Select the components to show'. The instruction says 'Choose the components to include on your home page layout.' There is a 'Layout Name' field with the value 'Dashboard Home Page Default'. Below this are two sections: 'Select Wide Components to Show' and 'Select Narrow Components to Show'. In the 'Wide Components' section, 'Calendar' and 'Dashboard Snapshot' are checked. In the 'Narrow Components' section, 'Sidebar Search', 'Create New...', 'Recent Items', 'Messages & Alerts', 'Custom Links', and 'Smartsheet' are checked. At the bottom right are 'Next' and 'Cancel' buttons.

4. (Optional) Reorder the Smartsheet component, and then click **Save**.

The screenshot shows the 'Edit Home Layout' page, Step 2 of 2. The title is 'Edit Home Layout'. Below the title is a section 'Step 2. Order the components'. The instruction says 'Arrange the components on your home page.' There are two columns: 'Narrow (Left) Column' and 'Wide (Right) Column'. In the 'Narrow' column, the components are: Sidebar Search, Create New..., Recent Items, Custom Links, Messages & Alerts, and Smartsheet. In the 'Wide' column, the components are: Dashboard Snapshot, Tasks, and Calendar. At the bottom are 'Previous', 'Save & Assign', 'Save', 'Preview', and 'Cancel' buttons.

5. If necessary, apply the same changes to other home page layouts.

# Hiding the Smartsheet Application and Tab

Since the Smartsheet application is mainly used to link Smartsheets to other objects in Salesforce, we recommend following these steps to hide the Smartsheet application and Smartsheets tab from users.

NOTE: This configuration is only available in Enterprise or Unlimited Editions of Salesforce. Group and Professional Editions do not have custom profiles enabled.

To hide the Smartsheet application and tab:

1. Within **Administration Setup**, select **Manage Users > Profiles**.

Action	Name	User License	Custom
Edit	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit	Content Only User	Content Only	<input type="checkbox"/>
Edit	Contract Manager	Salesforce	<input type="checkbox"/>
Edit	Customer Portal Manager	Customer Portal Manager	<input type="checkbox"/>
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
Edit	Customer Portal User	Customer Portal User	<input type="checkbox"/>
Edit   Del	Custom - Sales User	Salesforce	<input checked="" type="checkbox"/>
Edit	Force.com - One App User	Force.com - One App	<input type="checkbox"/>
Edit	Gold Partner User	Gold Partner	<input type="checkbox"/>
Edit	Marketing User	Salesforce	<input type="checkbox"/>
Edit	Read Only	Salesforce	<input type="checkbox"/>
Edit	Solution Manager	Salesforce	<input type="checkbox"/>
Edit	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit	Standard User	Salesforce	<input type="checkbox"/>
Edit	System Administrator	Salesforce	<input type="checkbox"/>

2. Click **Edit** next to whatever profile you are configuring.

**Profile Edit** | Custom - Sales User

Set the permissions and page layouts for this profile.

**Custom App Settings**

Visible	Default
<input checked="" type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>

**Tab Settings**

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
Accounts	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>
Cases	<input type="checkbox"/>
Console	<input type="checkbox"/>
Contacts	<input type="checkbox"/>
Content	<input type="checkbox"/>
Contracts	<input type="checkbox"/>
Dashboards	<input type="checkbox"/>
Documents	<input type="checkbox"/>

Customizable Forecasts

Default On
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Custom Tab Settings

Google AdWords Setup

Smartsheets

Tab Hidden



3. Under **Custom App Settings**, clear the Smartsheet checkbox.
4. Under **Tab Settings**, change the Smartsheets dropdown to **Tab Hidden**.
5. Click **Save**.
6. Repeat these changes for other profiles as needed.  
TIP: You can skip the tab setting change for non-custom profiles, since non-custom profiles can never see custom object tabs.

# Smartsheet Application Plans, Pricing, and Assistance

Information about Smartsheet plans and pricing can be found at [www.smartsheet.com/pricing](http://www.smartsheet.com/pricing). Smartsheet can be licensed on a named user or domain-wide basis.

After installing Smartsheet from AppExchange, your users can start a free 30-day trial by launching Smartsheet from within Salesforce and creating their first sheet (without having to submit payment information).

The user's email address serves as their Smartsheet account and individual trial accounts can be absorbed into a multi-user or domain license at any point should you choose to license Smartsheet for your organization.

If a user is neither added to a license nor elects to upgrade their own account, he or she will lose the ability to create sheets but will continue to have access to sheets shared to them by other licensed users.

Please note that Smartsheet for AppExchange integration features are available with a paid Smartsheet subscription. Only licensed users can create new Smartsheets. All other users can link to and collaborate on sheets created by licensed users.

To learn more about Smartsheet or review licensing options, visit our website at [www.smartsheet.com](http://www.smartsheet.com), email [support@smartsheet.com](mailto:support@smartsheet.com), or call us at (425) 283-1870.