smartsheet for appexchange

Installation and Customization Guide

Smartsheet, Inc.
10500 NE 8th St, Suite 1550
Bellevue WA 98004

Tel: 425-283-1870
Fax: 888-663-6866

www.smartsheet.com

Table of Contents

Introduction

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

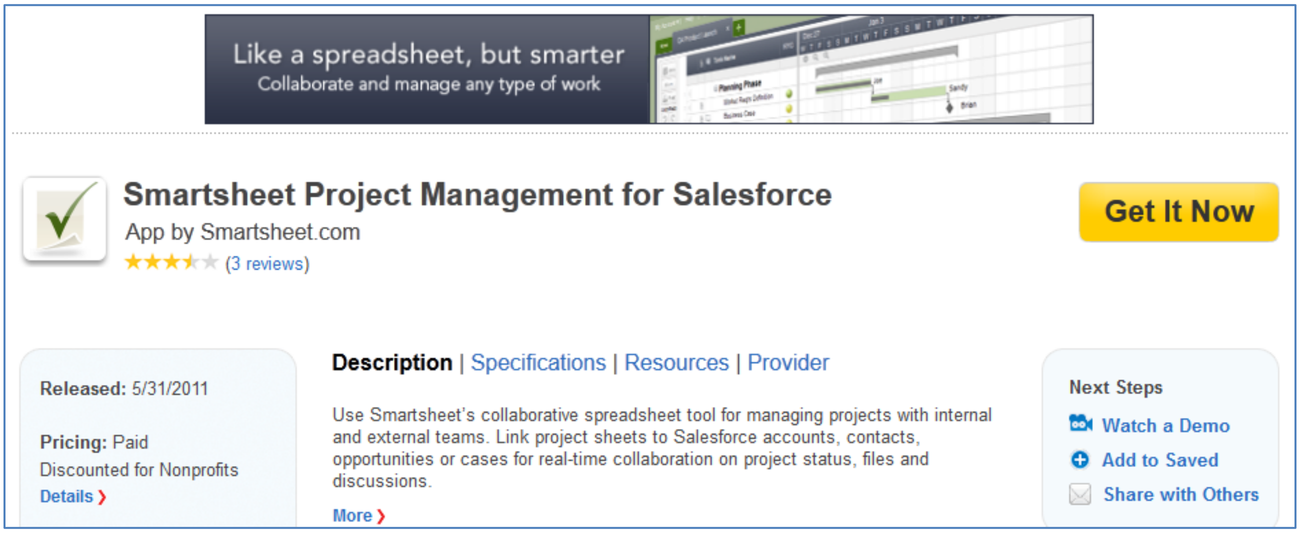
When Smartsheet is integrated with Salesforce, users can link project sheets to accounts, contacts, opportunities, other CRM objects or any custom object for real-time collaboration on project tasks and related files and discussions.

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

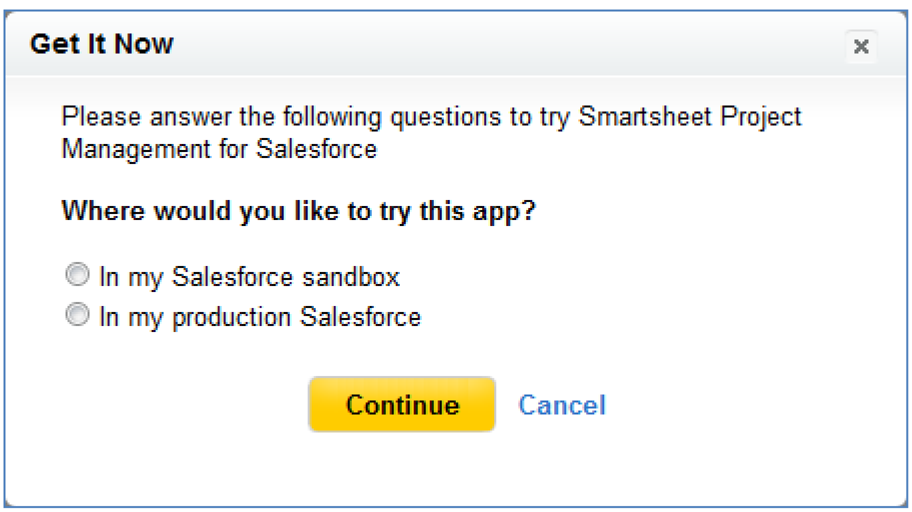
First, you need to get the Smartsheet application from Salesforce.com's AppExchange.

1. Go to the Smartsheet listing on Salesforce.com's AppExchange: http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JSACEA4

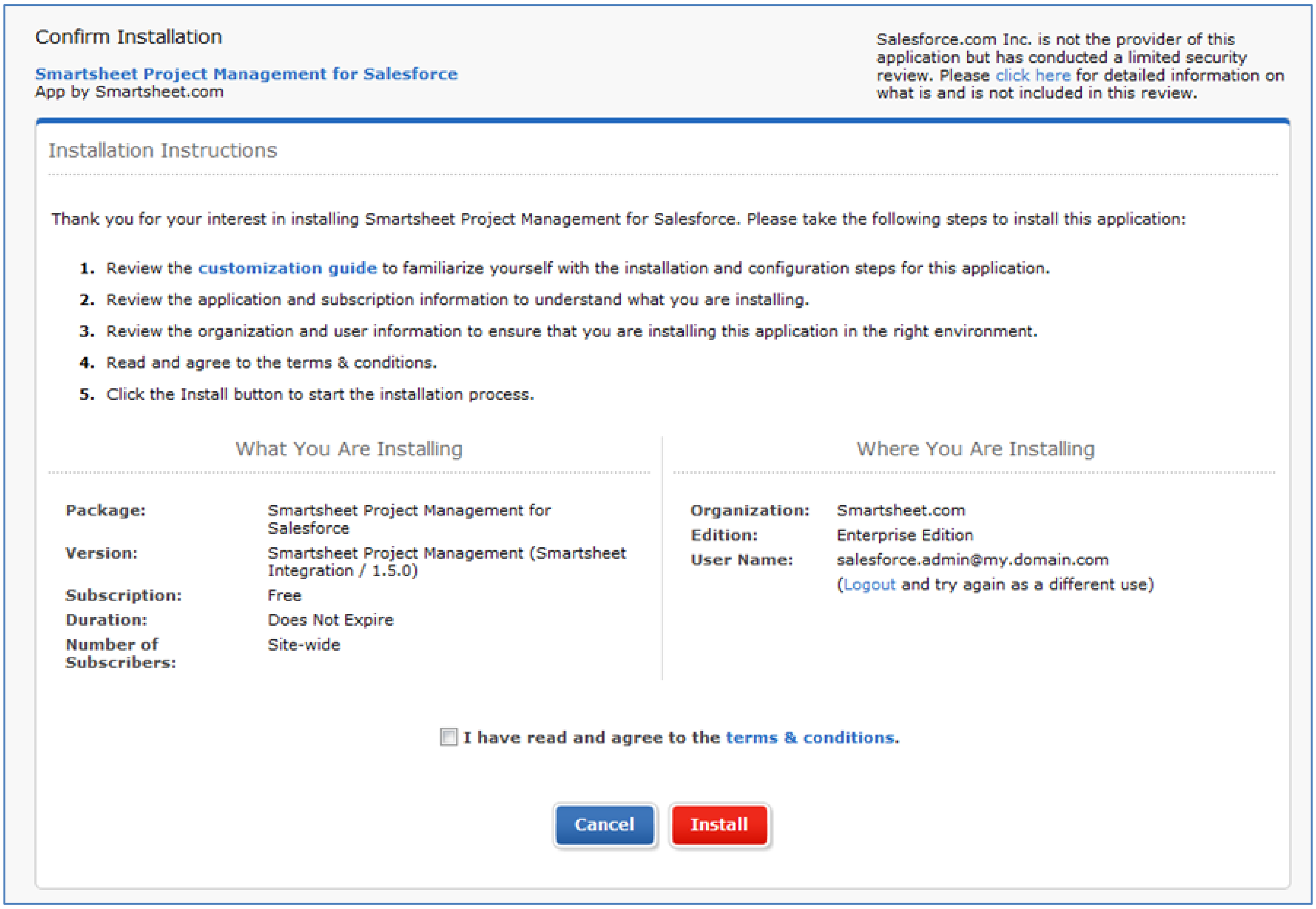


2. Ensure you are logged in with your Salesforce administrator account, using the **Login or Register** button in the page header.

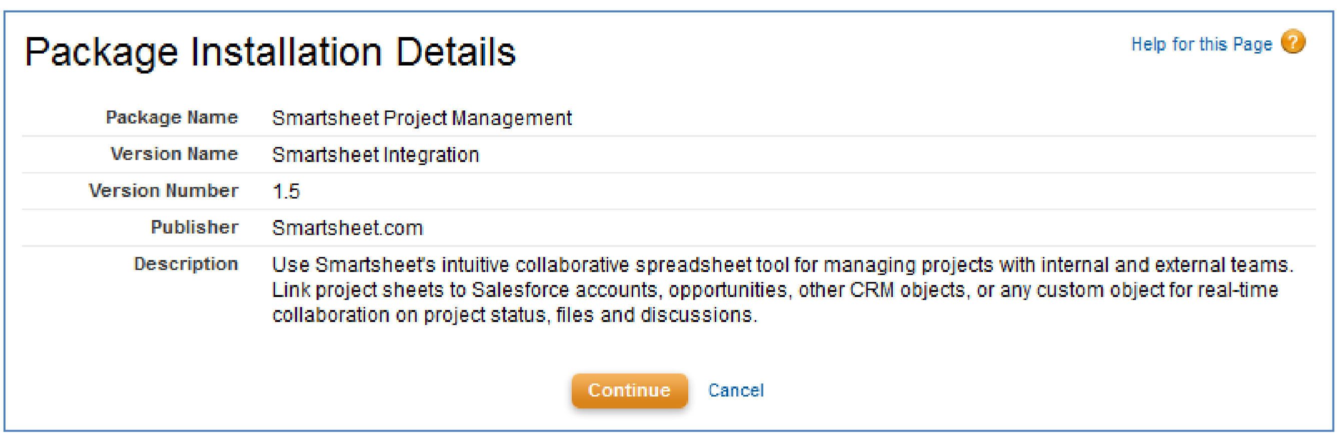
3. Click **Get It Now**.



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.



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



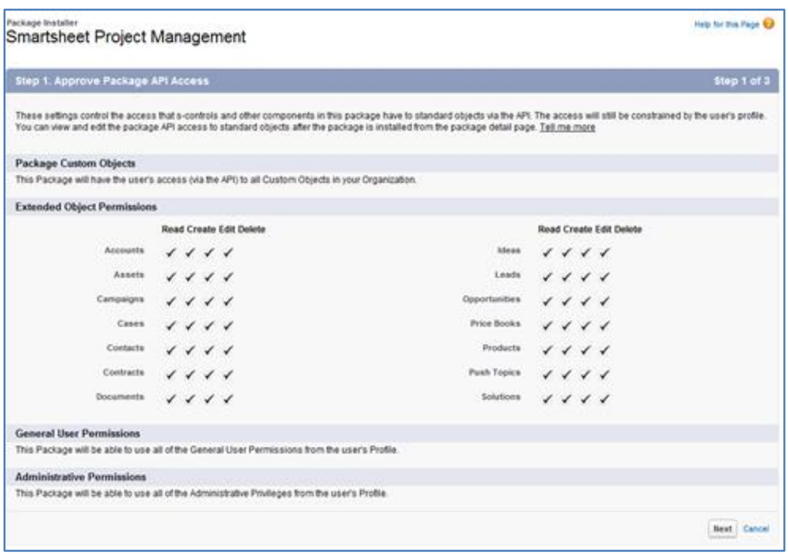
Installing the Smartsheet Application

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

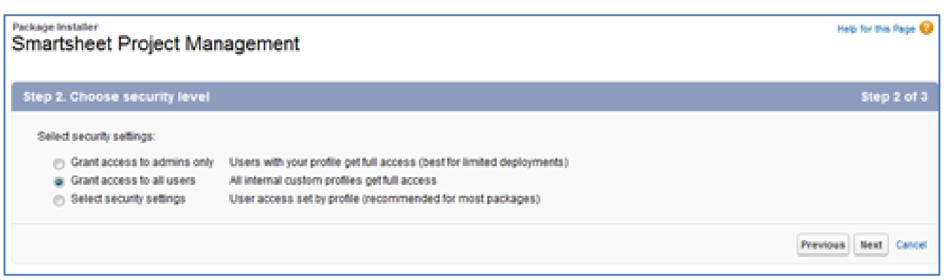
1. Launch the Smartsheet application package from AppExchange by clicking **Continue**. The **Approve Third-Party Access** window appears.

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.

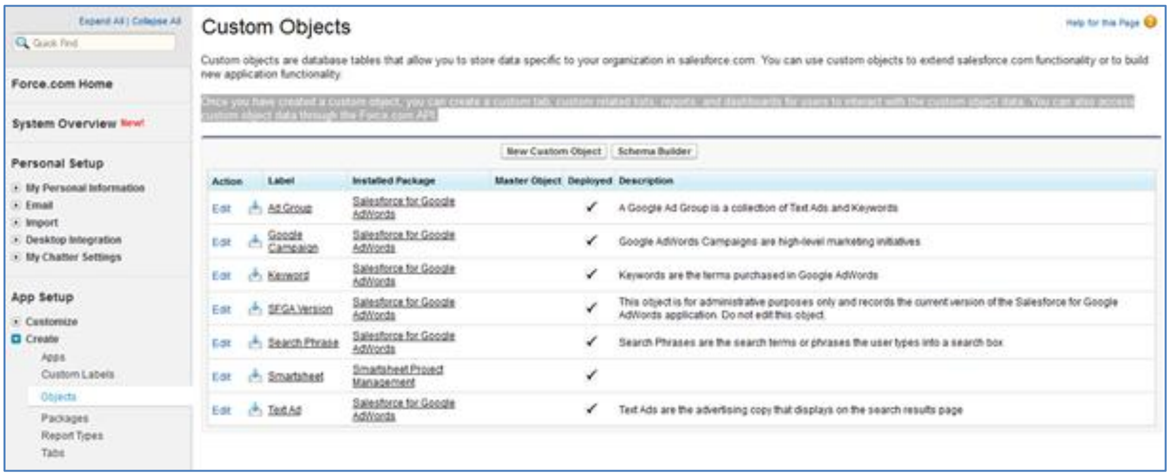
5. Click **Install**.
NOTE: If you want to test or customize the Smartsheet Integration package before it is visible to end users, go to **Setup** > **Create** > **Objects** and click **Edit** next to the Smartsheet object. Under **Deployment Status**, click **In Development**, and then click **Save**. 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

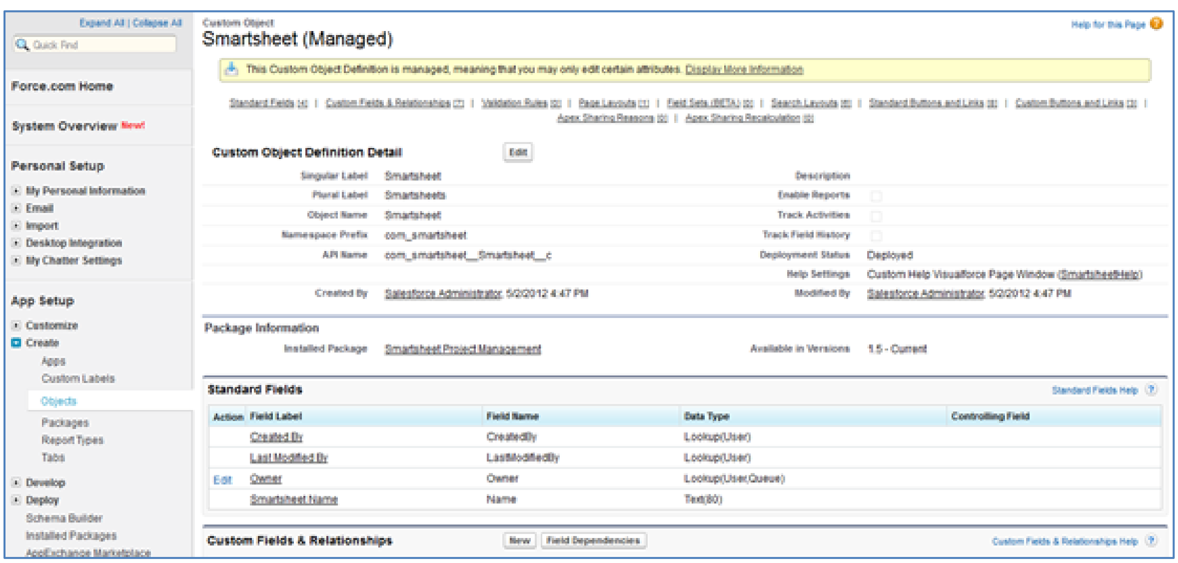
Next, you must create a relationship between the Smartsheet object and other objects within Salesforce.com. This allows you to have a Smartsheet related list on another object.

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.

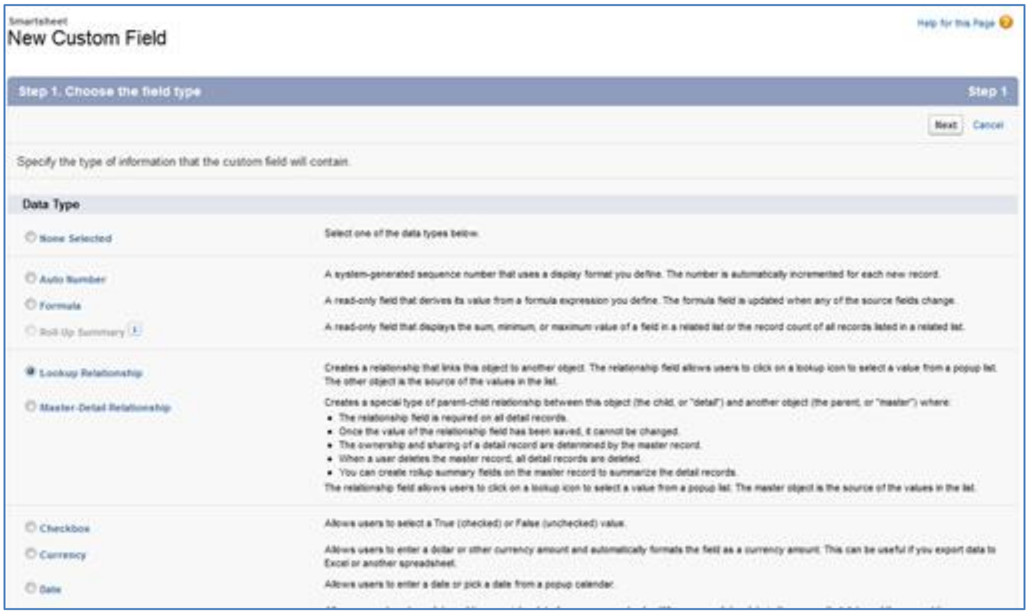
1. Go to **Setup** > **Create** > **Objects**. The **Custom Objects** page appears.



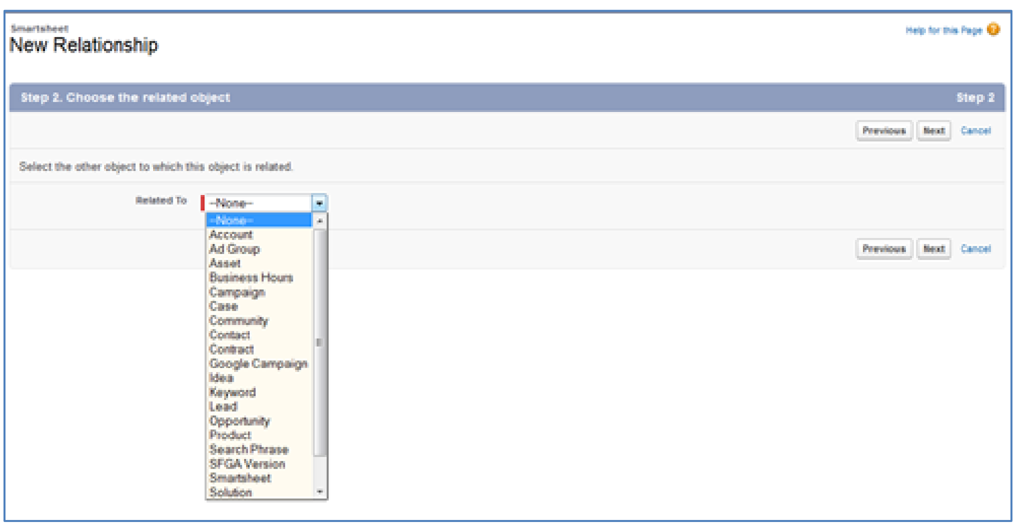
2. Click **Smartsheet**. The detail page for the **Smartsheet** object appears.



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

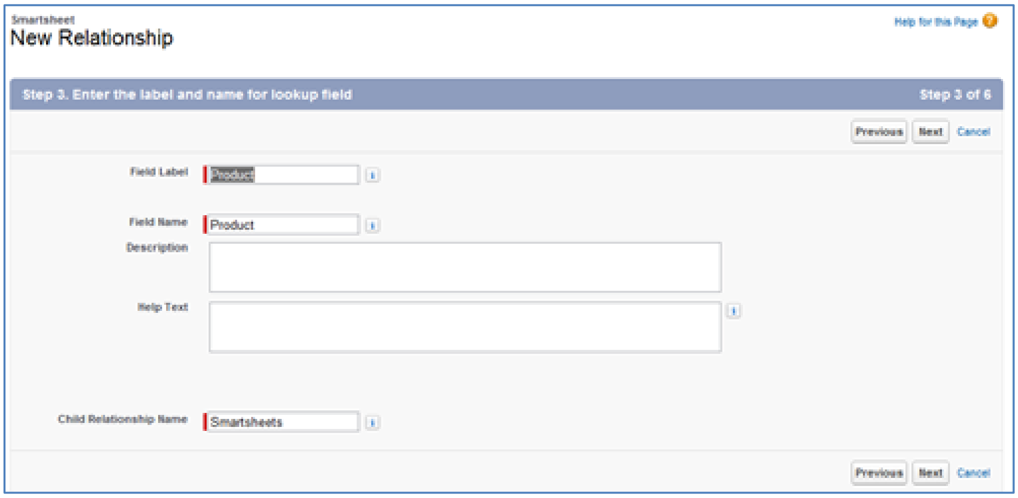


4. Click the **Lookup Relationship** option, and then click **Next**. The **Step 2. Choose the related object** page appears.



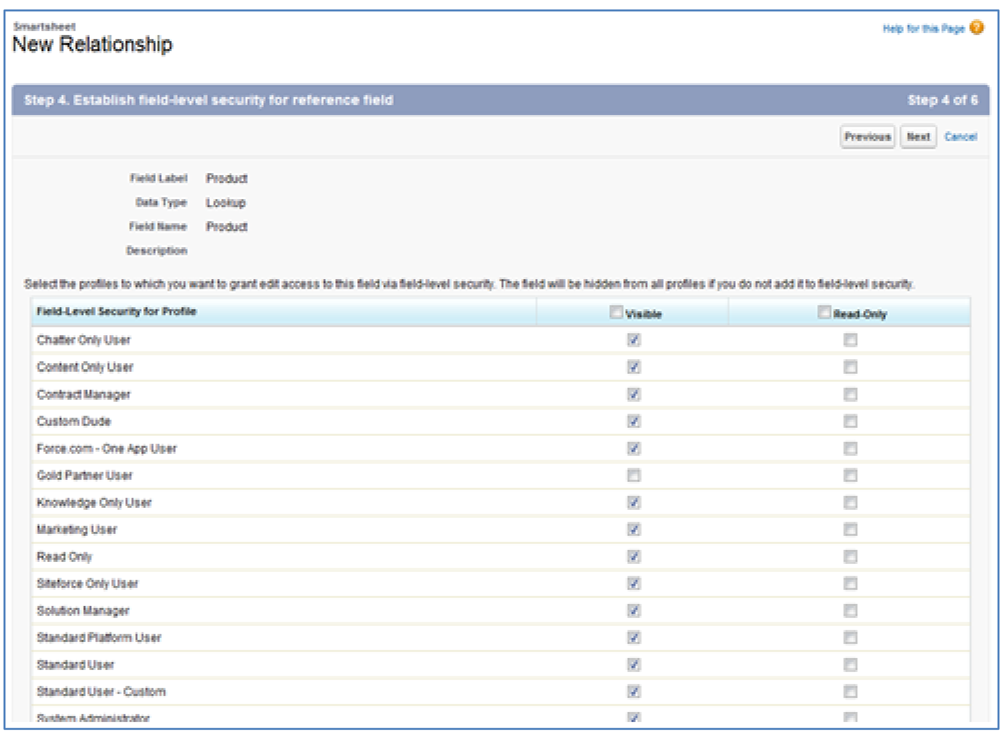
5. From the **Related To** list, choose the object to which you want to link Smartsheets, and then click **Next**. The **Step 3. Enter the label and name for lookup field** page appears.

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

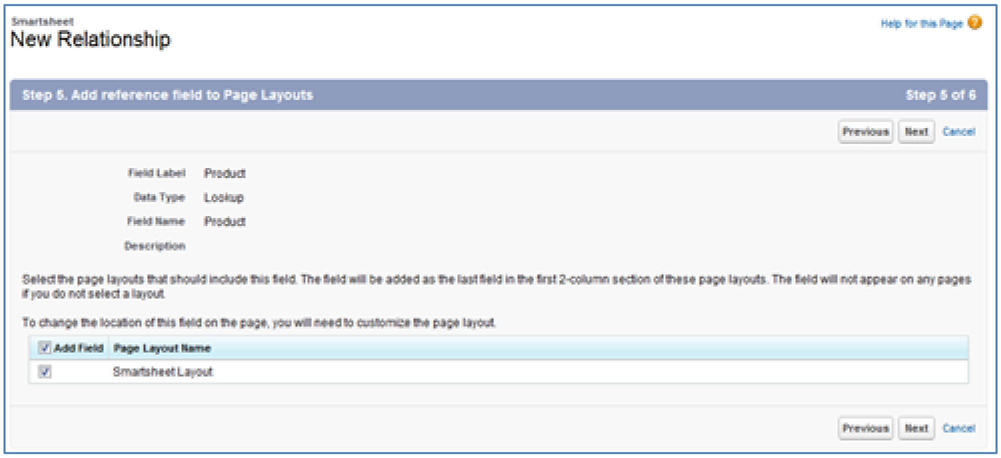


6. Fill in the **Field Label**, **Field Name**, and **Child Relationship Name** fields, and then click **Next**. The **Step 4. Establish field-level security for reference field** page appears.

   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.

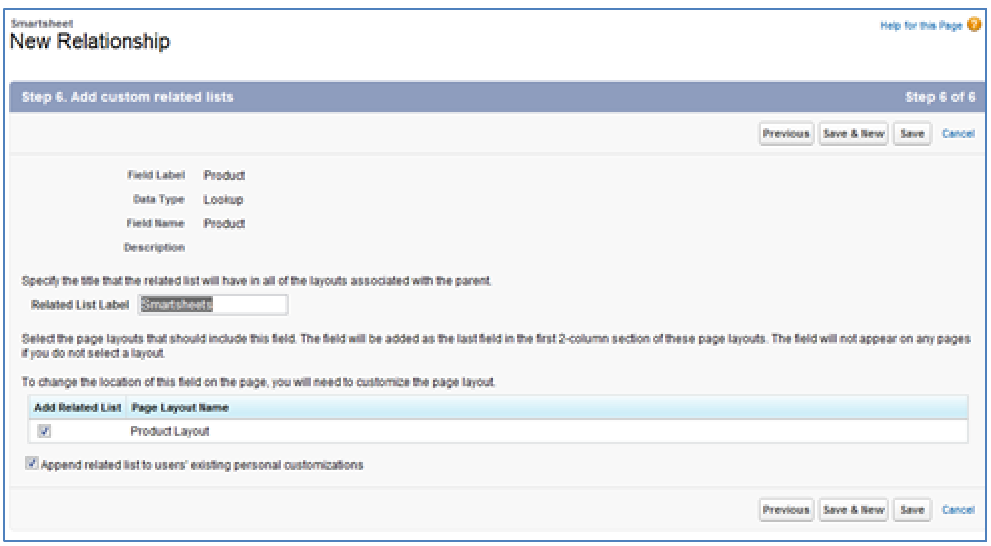


7. Choose the appropriate field-level security for your new lookup field, and then click **Next**. The **Step 5. Add reference field to Page Layouts** page appears.



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.



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.

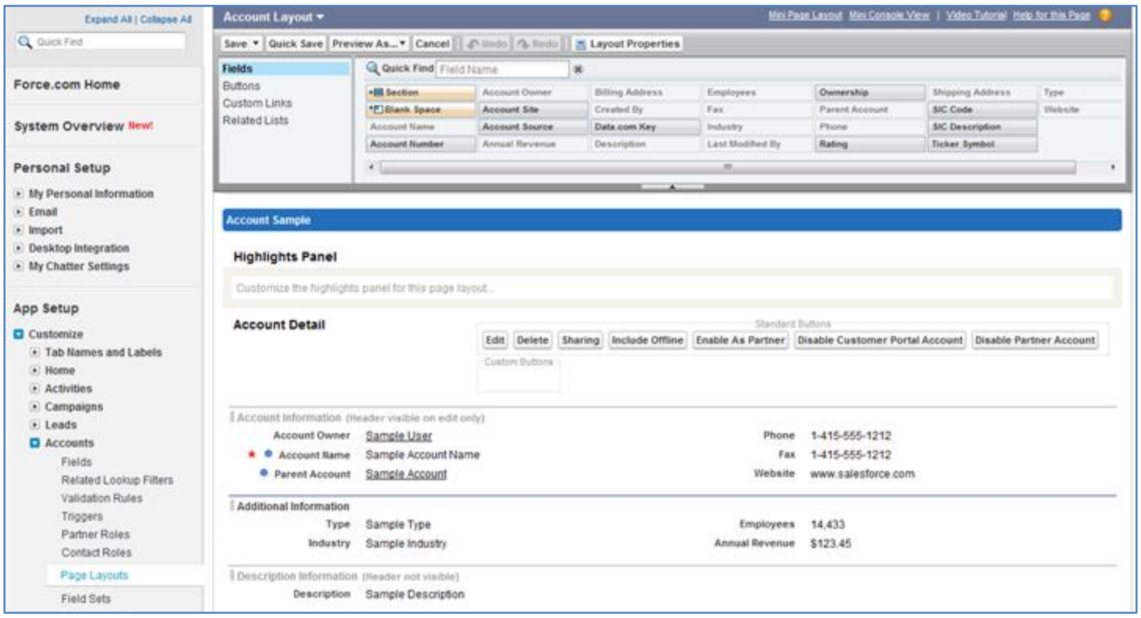
10. Repeat steps 1-9 for each additional object where you want to add a Smartsheets related list. NOTE: As mentioned earlier, this is not necessary for the Account, Opportunity, Contact, or Case objects.

Adding Smartsheet Related Lists

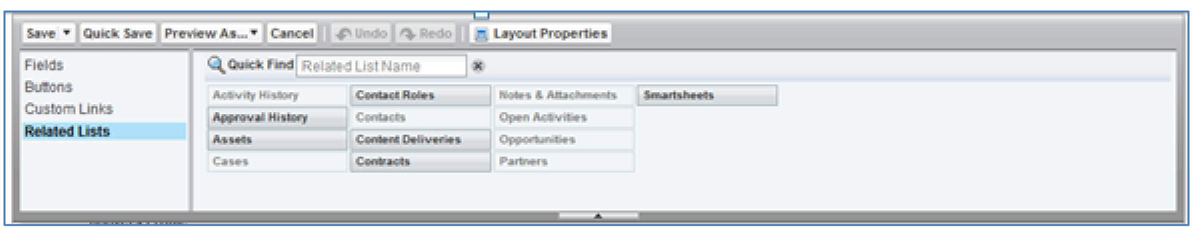
Use the steps below to add a Smartsheets related list to the page layout(s) for standard Salesforce objects or for custom objects.

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).

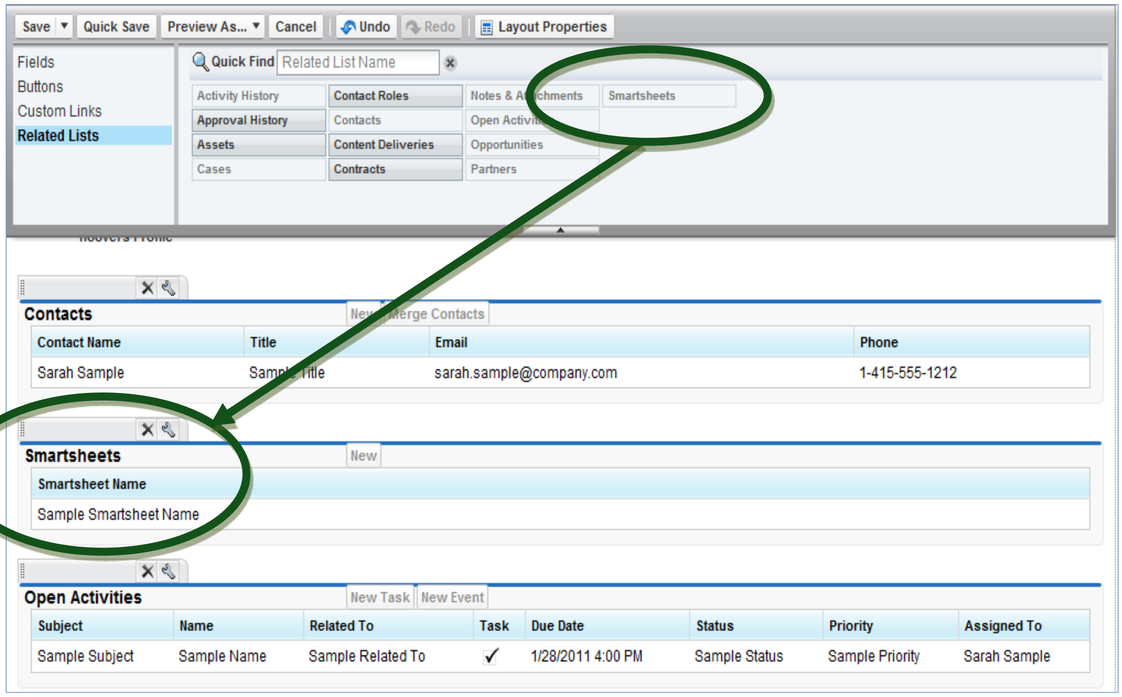
2. For a custom object, go to **Setup > Create > Objects** and click on the label for your custom object. In the **Page Layouts** section, click **Edit** next to the page layout you want to change.



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



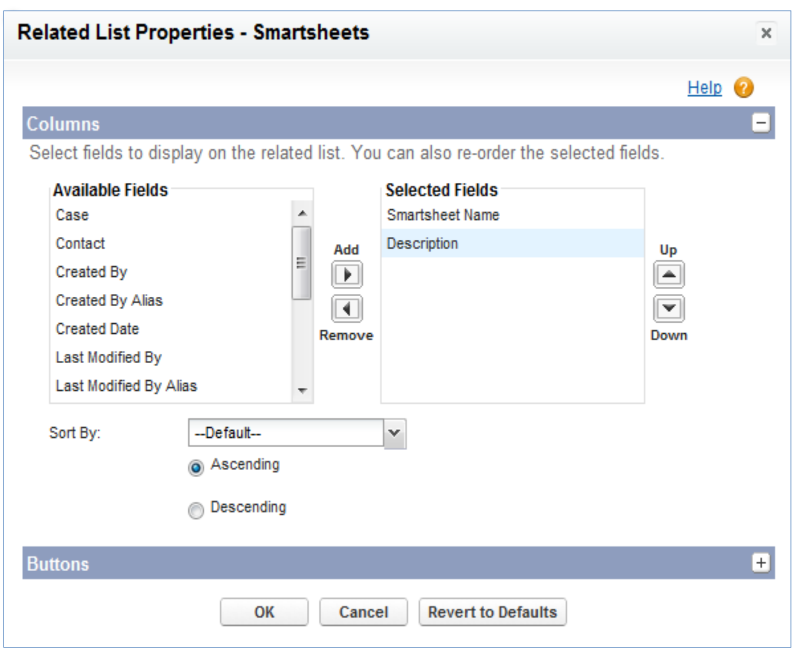
4. Drag the **Smartsheets** related list from the list picker in the page header to an appropriate place in your page layout (e.g., between Contacts and Open Activities).



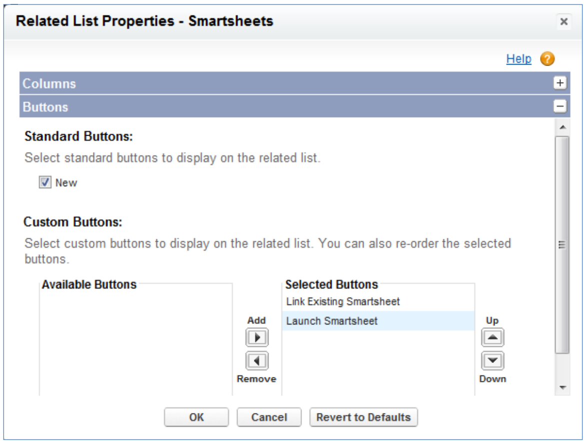
NOTE: If the Smartsheets related list is already in the page layout, just click on the Smartsheets list in the list picker to scroll to the list in the page layout.

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.

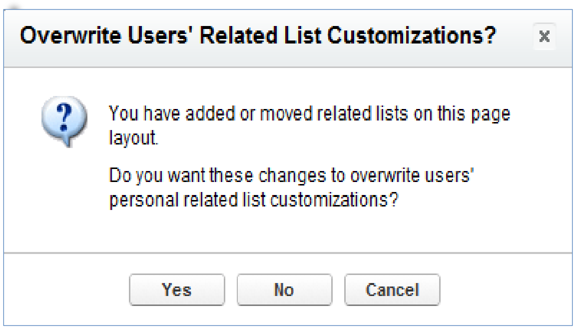


7. Click the + (plus) icon on the right side of the **Buttons** section to expand the Button properties. Click **Link Existing Smartsheet** and **Launch Smartsheet** from the **Available Buttons** list, and then click the Add button (right arrow). Click the **Launch Smartsheet** button in the **Selected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



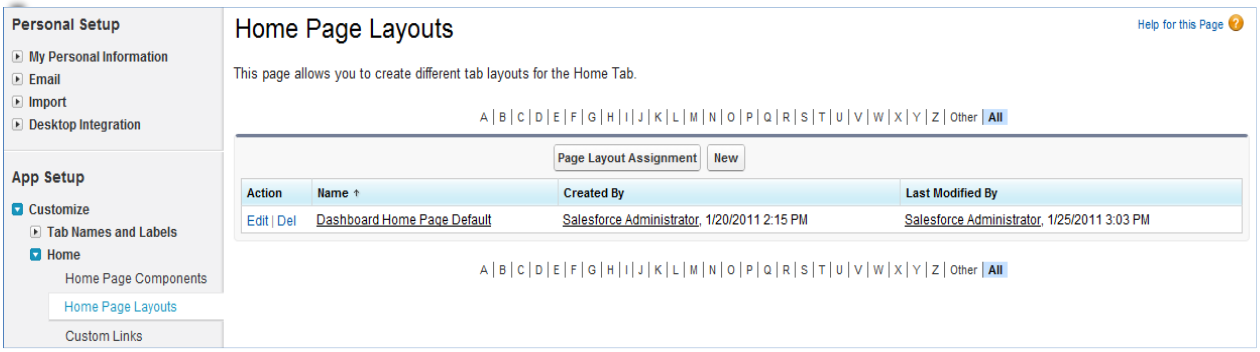
NOTE: If you answer **No**, users who have customized their related lists must manually add the Smartsheets related list.

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

(Optional) Adding Smartsheet to the Home Page

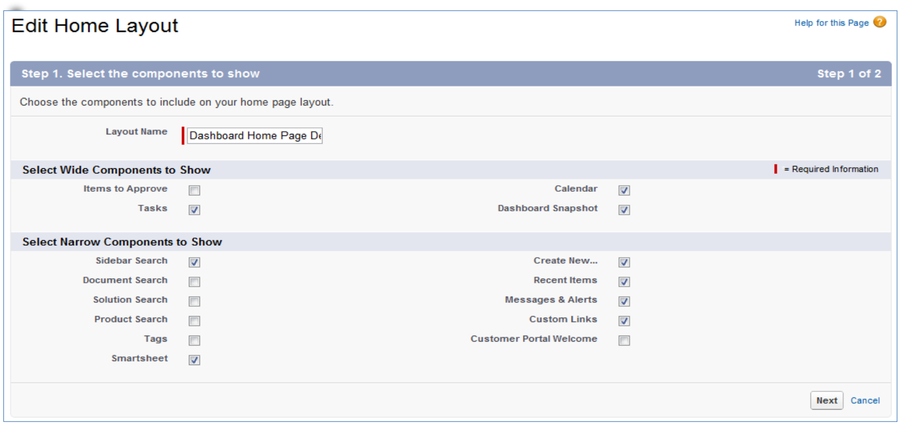
This is an optional step that gives your users an easy way to open Smartsheet by adding a **Launch Smartsheet** link to their Home Page sidebar.

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

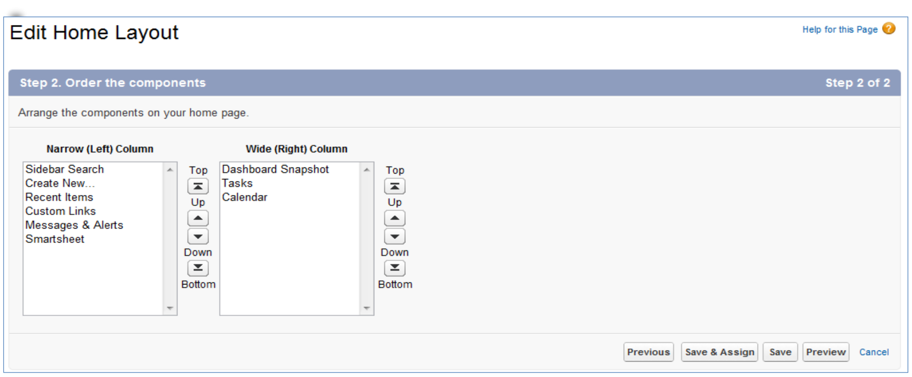


2. Click **Edit** next to the home page layout you want to change.

3. Select the checkbox for Smartsheet, and then click **Next**.



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



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

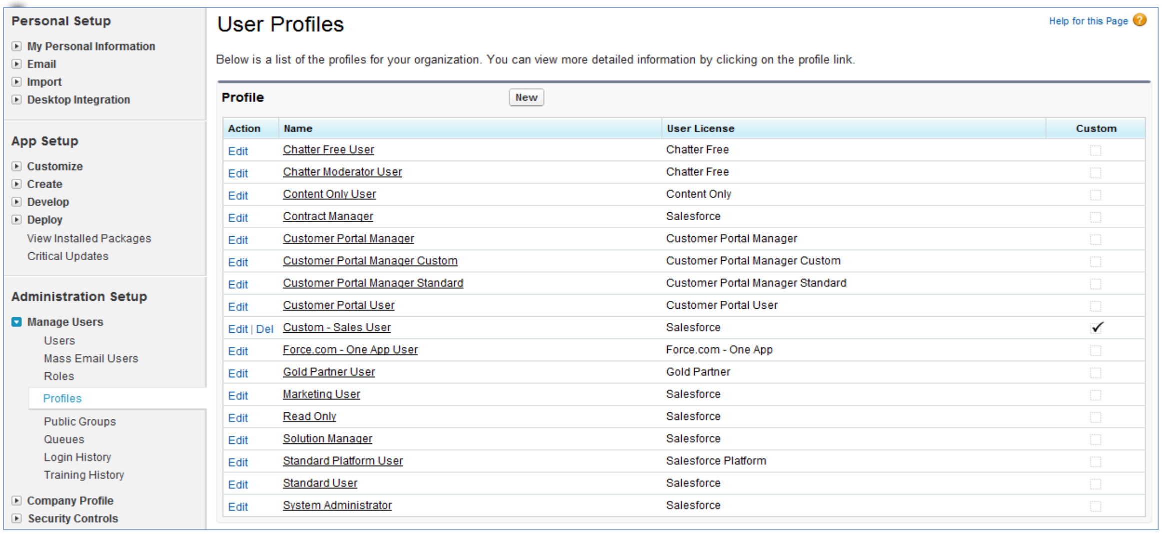
Hiding the Smartsheet Application and Tab

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.

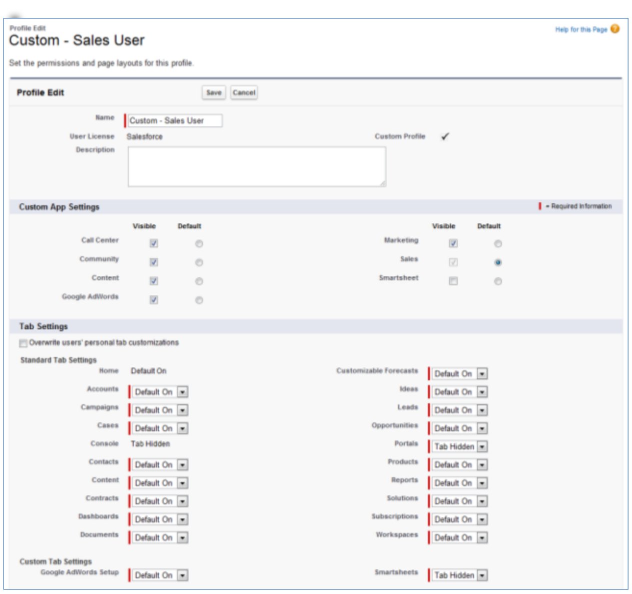
NOTE: This configuration is only available in Enterprise or Unlimited Editions of Salesforce. Group and Professional Editions do not have custom profiles enabled.

To hide the Smartsheet application and tab:

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



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



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. 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, email support@smartsheet.com, or call us at (425) 283-1870.