



Logging into Smartsheet for the first time

Okay. So, the Smartsheet administrator has sent an invite to you in this case it's Roger Knocker who has invited you to edit the demo. Roger hit a finance sheet. So, I'm going to click on that email and you will see that I've been Roger knockers has invited you to edit the following sheet. Not always will you find that I've invited you, maybe your administrator has invited you, so it could be somebody in your organization.

And click on the button to accept the invitation and set your password. So, I'm going to click on there. And the first time I go into Smartsheet, it might take a while just to download because it does use a bit of software in your browser, but I'm going to create a password and I'm not going to tell you what it is but I'm going to create a password and I'm going to agree to the terms. Okay. I've had to comply with the minimum passwords, 18 characters, and I'm going to continue. So, you can save this to your browser. I'm not going to do that. You will get some videos about Smartsheet, heart works. If you want to look at that, it's not critical at this stage. but I'm going to close that and I'm going to have a look at what's on my screen.

I've been invited to the same score card that we spoke about in the previous video, you have limited access to Smartsheet, upgrade to use the premium features. Don't do this. If we've sent you the Smartsheet, we've paid for the license elsewhere, you don't need to upgrade to anything unless you want to upgrade for whatever other reasons you want.

All right. So, you've got access to the smart sheet. You'll see, on the left-hand side I have only got access to this one, Smartsheet over here, which is the same one that you seen. What I'll also be able to do is navigate through the folders and I'll be given access to certain sheets.

In this case, I've been given access to the sheet. So, if I want to try and find it, if I had lots of sheets, lots of scorecards, I could just click on the folder and your administrator would maybe set up a folder structure for you. And you can just click on that and it will take you into the scorecard just some other features you might want to do.

Video Transcript

You might want to just bookmark this so that you can get to it quite quickly and then next time you log in, you'll see it in your recently opened list, and you can just click on that, maybe close this navigation bar over here, and you're all set to go, and so future videos, we're going to show you what is expected to capture the data, but you are in Smartsheet as it stands