Smartsheet Integration

Version 1.0

Description

Smartsheet is a cloud-based solution that enables teams to build powerful no-code/low-code solutions, collaborate effortlessly between small-to-large teams and move at the pace of business. Smartsheet enables the attaching of documents and other assets to Smartsheet Sheets (Grids) and easily sharing of sheets between users.

The Smartsheet Integration application enables for effortless integration between your Switch Workflows and your Smartsheet Sheets. Add a Smartsheet Integration anywhere in your flow in which you would like to have the file attached to a respective sheet in Smartsheet, configure the sheet destination and your attachments will be uploaded to Smartsheet.

Compatibility

Switch 2020 Spring and higher, Windows & Mac
smartsheet.com

Setup

In order to upload attachments you will need to have the Sheet ID and generated a Smartsheet Token.

In order to generate a Smartsheet Token:
- Go to Smartsheet
- Click on the Profile Icon
- Click Apps & Integrations…
- Click API Access
- Click Generate new access token
- Specify the access token name
- Click OK

In order to find the Sheet ID:
- Navigate to your Smartsheet Sheet
- Click File
- Click Properties
- Copy the Sheet ID

Connections

The Smartsheet Integration application requires at least one incoming connection and one outgoing connection.

If the upload of the attachment was success, then the job will move to the "Success" output connection(s).

If the upload of the attachment was unsuccessful, then the job will move to the "Error" output connection(s).
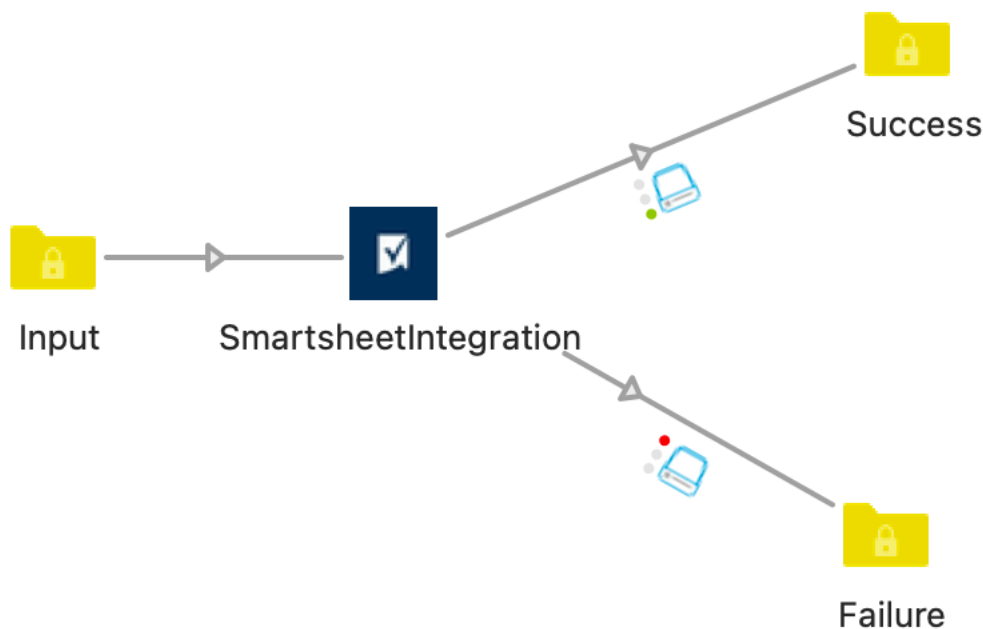
Application Properties

• **Smartsheet ID**

The Smartsheet ID of the sheet in which you will be uploading the attachment.

• **Smartsheet Token**

The Smartsheet Token generated by the approved user account. This user will need to have access to any sheet in which the attachment should be uploaded.

Example Flow

Smartsheet is a trademark of Smartsheet Inc. The Smartsheet marks include the Smartsheet name and logo, and any word, phrase, image, or other designation that identifies the source or origin of any of Smartsheet's products. Use of these marks does not indicate sponsorship or endorsement by Smartsheet.