

Propel multi-step processes forward with granular sharing controls

The challenge

Sharing the right information while protecting privacy and preventing disruption is a constant challenge. Stakeholders struggle to find what matters amid cluttered information and without clear guidance, complex processes are prone to errors and delays.

The solution

Dynamic View allows users to streamline and accelerate multi-step processes by bringing relevant information to the right people at the right time for viewing, editing or approving.

1 Collaborate with Confidence

Surface data from a sheet or report with a third party allowing them to view and edit only the data relevant to them without hindering collaboration.

2 Focus on What Matters

Filter out the noise with customized views into the elements of work stakeholders need to take action on in order to move processes forward.

3 Provide In-Context Guidance

Ensure work gets done right, the first time by leading users through multi-step processes with structured guidance and guardrails.

Identifying Multi-Step Processes

These common patterns of work point to multi-step processes that are a great fit for Dynamic View:



Multiple stakeholders



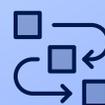
Sensitive information



Asynchronous work



Repeatable work



Need for a defined process



Reporting requirements

How business teams leverage Dynamic View:



Collaborate with third parties

Manage time-sensitive, confidential data without compromising collaboration.



Streamline work requests

Streamline requests by using a pre-built form to collect, filter, require key fields, and view any type of requests.



Move work forward

Reduce clutter, making it easier for stakeholders to find and take action on the information that is important.



Accelerate approvals

Simplify each individual's view of work while providing clear visibility into process execution states.

Embed Your Dynamic View

Unlock even more value by embedding your Dynamic View directly into a dashboard or collection, making it easier to provide your teams the visibility they need in a single consolidated place.



Before Smartsheet, we were drowning in emails and spreadsheets. But now, Dynamic View is like a breath of fresh air. Everyone understands what's happening. Employees can zoom in on line items specific to their work to check and update status, or even make requests.

shorr | packaging corp. Mitchell Mook, Director of Process Improvement, Shorr Packaging



Learn how
to set up
Dynamic View



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