

User Subscription Model

This brief applies to Smartsheet subscriptions and plans.

Contents

• Summary	2
• Details	2
Legacy Collaborator Model	2
User Subscription Model	2
New user types	3
Provisional Use	4
Reconciliation Period & True Up	5
• Frequently asked questions	6

Summary

The purpose of this brief is to introduce the basics of the Smartsheet user subscription model for all new plans. Compared to our legacy model, the Smartsheet user subscription model delivers improved customer value in four distinct ways:

- **Transparent, predictable pricing:** System Admins will have a new level of transparency and control over current subscription usage and future needs. To enable this, we've introduced three primary Smartsheet user types: Members, Guests, and Viewers. Members are paid while Guests and Viewers are free and unlimited.
- **Faster value realization:** New users can get started within a "try before you buy" timeframe. As part of our new true-up model, new users will get to experience the full value of Smartsheet before System Admins need to purchase additional licenses for them.
- **Ease of management:** New product experiences enable System Admins to truly understand the footprint of your Smartsheet environment with increased visibility into user behaviors. Now, System Admins will be able to more easily comply with governance standards.
- **Access to new features:** With our new user subscription model, you'll gain access to exclusive features like collections, enabling role-based sharing for focused collaboration, and file library, where you can organize, find, annotate, and review files alongside projects.

Together, these key values and improvements make it easier to do business with Smartsheet.

Details

Legacy Collaborator Model

Our legacy collaborator model was built on the foundation of giving creators access to the product while enabling free collaboration as an Editor or Commenter. That resulted in significant growth through viral adoption, but also resulted in fewer users being able to take full advantage of the platform. Only users who needed to create sheets, reports, dashboards, or workspaces were required to pay. Under this model, System Admins faced challenges in understanding Smartsheet user types, effectively managing their users, assigning licenses appropriately, and demonstrating the platform's value to their leadership teams. We made it more difficult than necessary for customers to do business with us.

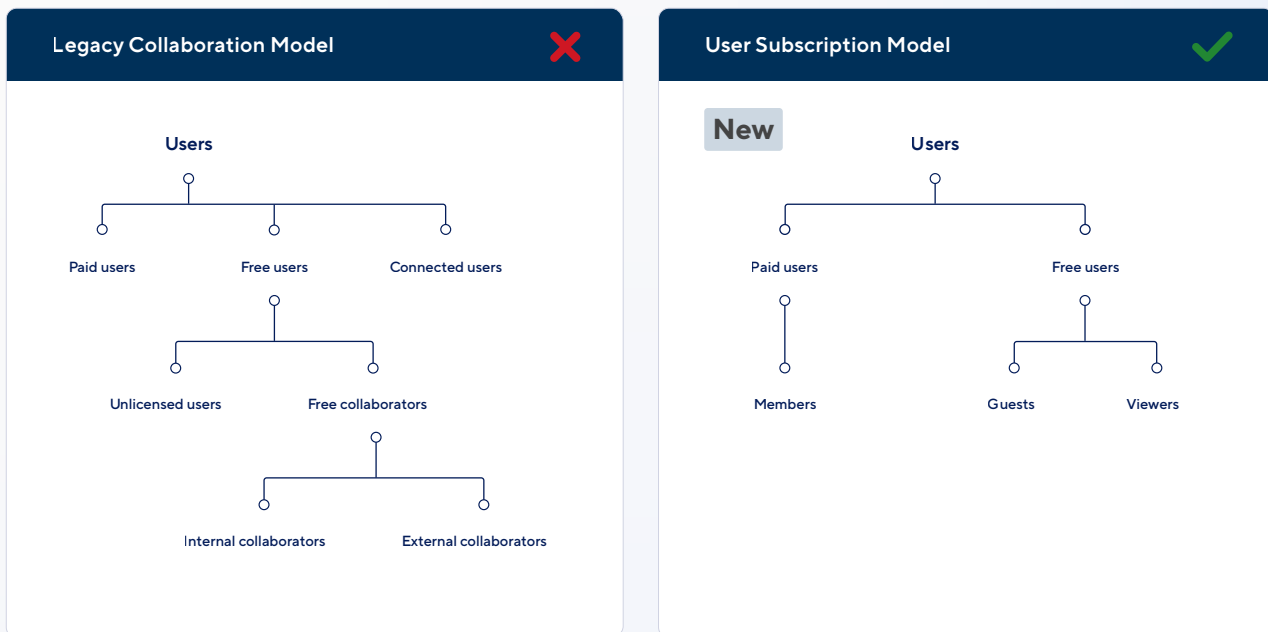
User Subscription Model

While creation is important, Smartsheet is a collaborative work management platform; collaboration is at our core. The power and value of the Smartsheet platform truly stand out in enabling teams to create processes, programs, and projects, and collaborate on critical business initiatives.

The user subscription model overcomes all the challenges of our legacy model. It adapts to your evolving business needs, helping you achieve your goals as your organization grows. We are doing this by introducing:

- **New User Types**
- **Provisional Use**
- **Reconciliation Periods & True Ups**

Reduced user types & streamlined pricing



New User Types

To simplify how customers understand their Smartsheet environment and the return on their investment, we have significantly streamlined our user types with the user subscription model. System Admins will gain clear, transparent visibility into these user types, making it easy to manage them while understanding what users can do across plans, features, and products. Internal users have email addresses matching any domain associated with the plan, while external users have email addresses that do not match the plan's domains.

Members

- Members have full Smartsheet access per the subscription plan. They can be shared with assets at any permission level
- A System Admin can assign the Member user type at any time
- Members may also access Smartsheet non-paid for a provisional period, allowing them to "try before you buy"

Guest

- Guests can have Editor or Commenter permissions to assets
- An external user becomes a Guest when they are shared to at least one asset with Editor or Commenter permissions
- A System Admin can change an external user's user type from Member to Guest

Viewer

- Viewers can only have Viewer permissions to assets
- An internal or external user becomes a Viewer when shared to at least one asset with Viewer permissions
- A System Admin can change an internal or external user's user type from Member to Viewer

User type	Previous downgrades	Duration in current user type	Highest sharing permissions
Member	0	1 month	Admin
Member	0	4 months	Admin
Guest	0	6 months	Admin
Viewer	0	1 month	Admin
No access	0	2 months	Admin

Provisional Use

Temporarily free users, whether internal or external, can create, edit, comment, and view sheets, workspaces, and other items. However, they only gain access to Smartsheet when shared on a sheet, report, dashboard, or workspace as an Admin, Editor, or Commenter. Transitioning users to paid access can be challenging, as it's often unclear how much access they truly need. With the new model, anyone can use Smartsheet provisionally for at least 30 days, free of charge, without requesting a license. During this period, they can fully experience Smartsheet's value, helping them understand its benefits before the reconciliation period begins.

Provisional status indicates:

- You're not billed for this Member when the user receives a provisional status
- You can review this Member's usage before paying for their access

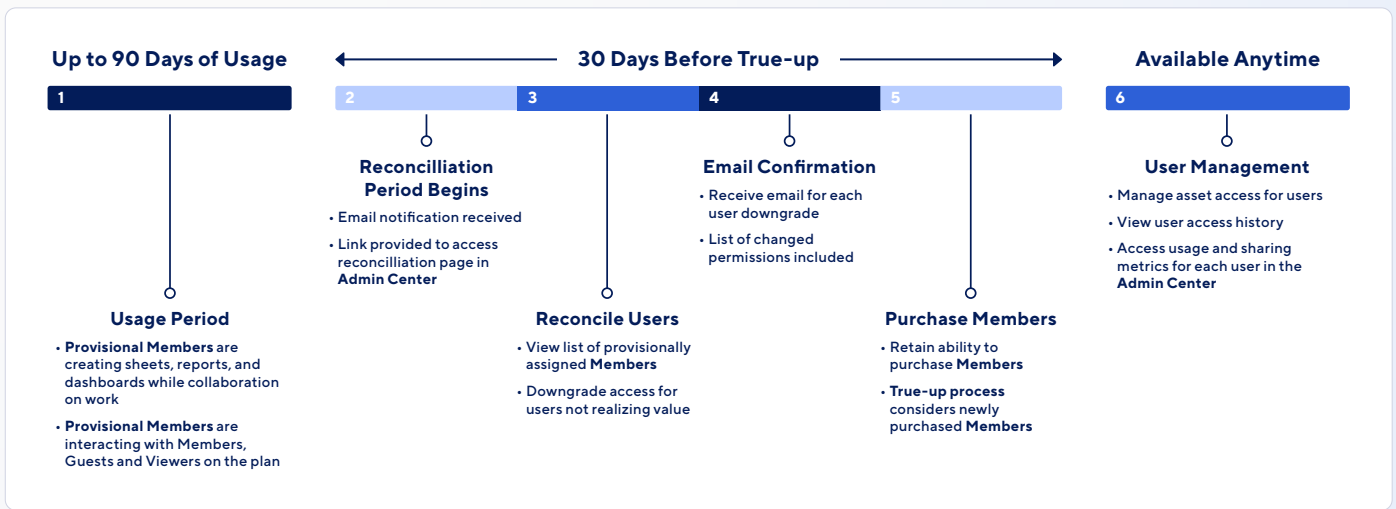
Users will be provisional Members for at least 30 days before they are eligible for reconciliation.

Reconciliation Period & True Up

During quarterly reconciliation periods, System Admins can see all user type activity and leverage corresponding usage data. This data will be used to determine if a user should be designated a Member. If it's more appropriate to limit their access, the System Admin can demote them to a Viewer (internal/external users) or Guest (external users) on the plan. Reconciliation periods are determined by the contract billing period and repeat every 60-90 days.

Smartsheet Quarterly Reconciliation Process

SysAdmin experience managing provisional usage



The true-up process includes pairs of usage and reconciliation periods. Usage periods are ongoing, and the second usage period starts as soon as the first reconciliation period begins.

Reconciliation periods are quarterly for annual customers and monthly for monthly customers.

The reconciliation period occurs:

- Approximately 30-35 days before the quarterly auto-bill date for annual customers
- Seven days before the auto-bill date for monthly customers

User types and true-up Page last updated Jul 23, 2024, 1:00 PM True-up ?

All users (90) **True-up (15)**

For usage period: Sept 1, 2024 - Nov 27, 2024

In reconciliation: 25 days left

Current annual plan: 10 Purchased Members

True-up: 5 Members

Auto payment due on Dec 28, 2024: \$627.00

Avatar	Name	External	Member	Provisional	True-up	Downgrades	User type	Permissions
AB	Adam Bennett	External	Member			0	1 month	Admin Yesterday
AC	Alice Carter		Member			0	4 months	Admin 2 months ago
BD	Ben Davis		Guest			0	6 months	Admin 1 month ago
BB	Bill Burns	External	Viewer			0	1 month	Admin 3 days ago
CE	Catherine Evans		No access			0	2 months	Admin 1 month ago
CS	Collin Smith		Member			0	2 months	Admin 1 month ago

When a reconciliation period starts for your plan, you'll receive an email with key dates and provisional Members to review. See the [Manage users in the User Subscription Model](#) article for step-by-step instructions.

You can download the [user type report](#) on your plan whenever you need to. The report lists all active users associated with the plan. It includes the following details by user:

- Email and domain
- User type and Admin access types
- Permissions
- Activity

Frequently asked questions

What is the Smartsheet user subscription model?

The user subscription model helps you realize more value from Smartsheet by simplifying pricing, budgeting, and administration:

- **Simplifying our user types** - We've simplified from 10+ user types down to three simple, consistent user types: Members, Guests, and Viewers. These [user types](#) help you find exactly what you need, and you'll never have to purchase Members in bundles.
- **Members are valuable** - Creating, managing, and collaborating on processes, programs, and projects is critical to a business's success. With Smartsheet, Members can create, administer, edit, and comment, meeting all these essential needs. We continue to offer free access to both Viewers and Guests.
- **Provisional use** - Give users full access to Smartsheet for at least 90 days at no cost, allowing them to freely create and collaborate—unlocking the platform's full potential. Never again will you wonder who needs a Smartsheet subscription.
- **Reconciliation periods & true ups** - System Admins can [monitor all user types](#) to make informed budget decisions. Each quarter, they will be reminded to review usage data to decide whether to upgrade provisional users to Members.

Members now get more value

	Members	Free Collaborators
Create new sheets, reports, dashboards, or forms	✓	✗
Change permissions or manage sharing settings	✓	✗
Unlock rows or columns	✓	✗
Access automated workflows	✓	✗
Use AI formulas, texts, and charts	✓	✗
Track workloads	✓	✗

Why is the model changing?

Smartsheet is changing its subscription model based on customer feedback and industry standards. The new model aims to make it easier for new users to try the platform, simplify subscription management, and provide quicker visibility into user activity and productivity.

When will this model go into effect?

The new user subscription model is effective June 24, 2024. For new plans, these changes apply immediately. For existing customers, the new model will take effect at the first renewal in 2025. If you have a multi-year plan, the changes will apply when your plan is up for renewal.

What if I want to move to the new model?

Smartsheet will be allowing customers to move to the user subscription model in 2024. If you are interested in seeing if you qualify, please talk to your account representative to discuss your eligibility.

Can I opt out of the new model?

Customers are unable to opt out of any aspect of the user subscription model. This is a change that will be occurring across the entire Smartsheet platform and customer base.

Why are new Smartsheet features only available on the user subscription model?

The user subscription model allows new users to experience value upfront, while improving account management for greater control. By eliminating bottlenecks and accelerating collaboration, the new model offers a more seamless experience, which is why all new features will be built exclusively on it. While some features will be included in all plans, others will be exclusive to specific plan types.

[Examples of new features available on the user subscription model are collections and file library.](#)

Please note: State and Local Government, as well as EDU customers, will gain early access to these features before transitioning to the user subscription model, with automatic activation once they become available.

Will any products or plans be changing with the transition to the user subscription model?

As your plan transitions to the user subscription model, certain plans and features have been renamed, re-packaged, or - in some cases - enhanced across our Smartsheet product offerings. You can [view these changes here](#).