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Taking Formulas to the Next Level

Cornelius O'Connor
Success Manager

Make a friend!

Agenda

Control & automate your sheets

Compartmentalize & Protect Data

Demystify INDEX / MATCH vs VLOOKUP

“I can give you a six-word formula for success: Think things through — then follow through.”

— Eddie Rickenbacker

Control and automate

Formatting

- IF
- ANCESTORS

Reports

- JOIN

Health (RYG Ball)

- IF

Parent or child health formula

IF the condition below is met:

```
=IF(COUNT(CHILDREN(Task@row)) > 0,
```

Then, apply this formula to the parent row:

```
IF((COUNTIF(CHILDREN(), "Yellow") + (COUNTIF(CHILDREN(), "Green") * 2)) / COUNT(CHILDREN()) <= 0.5, "Red",
IF((COUNTIF(CHILDREN(), "Yellow") + (COUNTIF(CHILDREN(), "Green") * 2)) / COUNT(CHILDREN()) <= 1.5, "Yellow",
IF((COUNTIF(CHILDREN(), "Yellow") + (COUNTIF(CHILDREN(), "Green") * 2)) / COUNT(CHILDREN()) <= 2.5, "Green"))),
```

If not, apply this formula to the identified child row:

```
IF(Status@row = "Complete", "Green", IF(AND(Status@row = "Not Started", Date@row > TODAY()), "Blue", IF(AND(Status@row = "Not Started", Date@row < TODAY()), "Red", "Yellow"))))
```

Compartmentalize, protect, show!

Metric sheet

- Cross-sheet formulas
  - DISTINCT
  - AVERAGEIF
  - SUMIFS
    - ISDATE
    - MONTH
    - @cell

Dashboard

- Real time insights for everyone
- No more copy pasting to a slideshow!

“I eat INDEX/MATCH and VLOOKUP formulas for breakfast!”

— All of you after ENGAGE

Let’s compare....

What’s the difference?

- INDEX & MATCH

- VLOOKUP

How to keep learning...

- Center of Excellence
- Pro Desk
- Help Center
- Community
- Certification
- Formula sheet in your account
    - Found in the Solution Center

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