# smartsheet ENGAGE / Taking Formulas to the Next Level



Lauren Furuya Senior Product Trainer Certain information set forth in this presentation may be "forward-looking information." Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them. Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet's filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

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## **Learning Objectives**

At the end of this session you will be able to:

- Maximize efficiency of your formulas in Smartsheet
- Make automation formulas more powerful
- Leverage formulas to run unique and dynamic reports



## **Agenda**

- Hierarchy functions
- Specialty functions
- Error handling
- Automation for smarter reports



## **Assumptions**

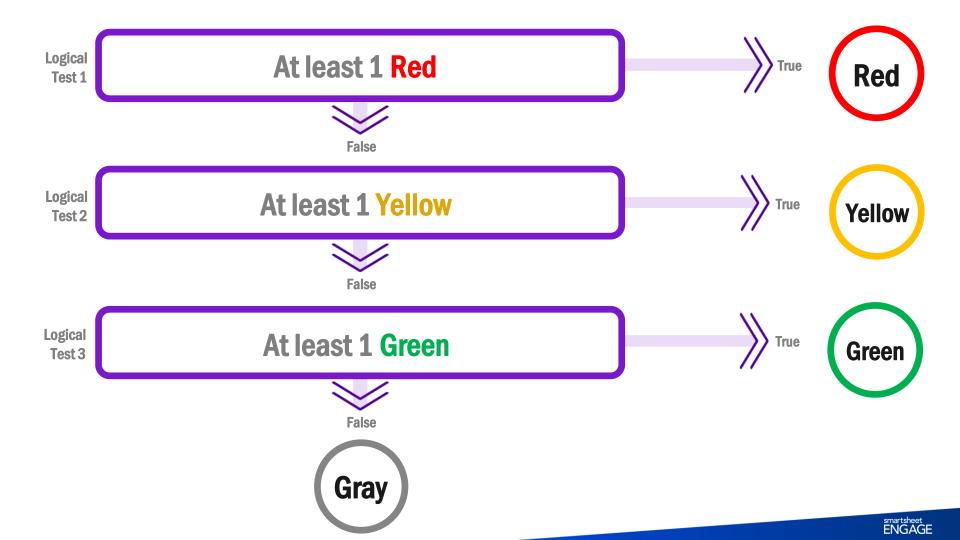
You have...

- Written formulas in Smartsheet or other spreadsheet applications
- Used the CHILDREN() function
- Seen or used logic functions like COUNTIF()
- Automated a Symbols column with IF() or nested IF() statements
- Comfortably used Help material to guide you through using functions



## CHILDREN()

Opportunity	Total Value	Status Notes
<ul> <li>Western Region</li> </ul>		
- Lance	\$33,039	
Braun-Schulist Inc	\$8,951	
Metz LLC	\$5,673	
Wintheiser and Sons	\$2,654	
Reynolds LLC	\$1,897	
Gleichner Inc	\$5,916	
Frami Group	\$7,947	



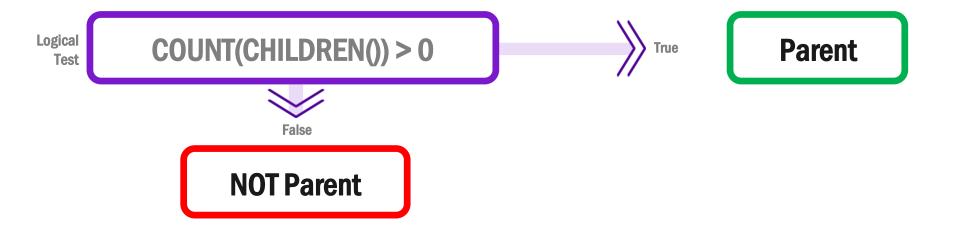


## **ANCESTORS()**

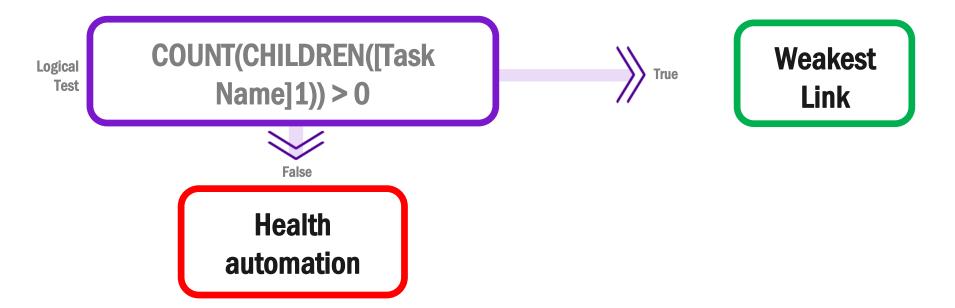


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#### How do we know if a row is a Parent?

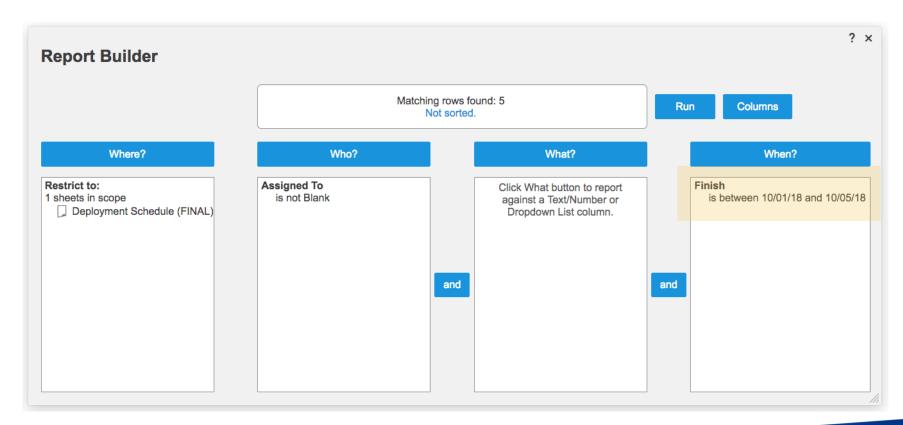


## **Comprehensive Health Formula**





### **Date Criteria**



## Recap

- Maximize efficiency of your formulas in Smartsheet
- Make automation formulas more powerful
- Leverage formulas to run unique and dynamic reports



#### **Smartsheet Resources**

#### **Solution Center:**

"Smartsheet Formula Examples" template

**Help and Learning Center:** 

help.smartsheet.com

**Smartsheet Community:** 

community.smartsheet.com







- Share your feedback in our survey in the ENGAGE app
- Stop by the Smartsheet Fundamentals II booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more

