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Smartsheet Formulas for Beginners



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Agenda

- **Objectives**
- **Essentials for building formulas**
- **Using formulas to enhance your workflows**
- **Key takeaways**
- **Resources to learn more**

Learning Objectives

Why should you care about formulas?

Because formulas can help you...

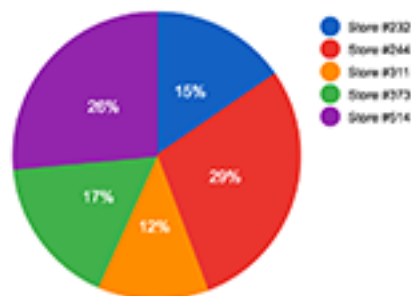
- **Automate your work:** Reduce manual tasks, automate workflows and more
- **Standardize:** Drive consistency and efficiency
- **Surface key data:** Build functional dashboards, reports and roll-up sheets

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SALES DASHBOARD

Quarterly Sales NW Region



Q1 Revenue by Store



World Wide Closer

20
Total Sold



OUT OF 35



Global 2000

9
Total Sold



OUT OF 40



Sales Resources

- Sales Report YTD
- Customer Brochure
- Proposal Templates
- Service Contract Template (402)
- Last Year's Forecast
- Commission Calculations

OVERALL PROGRESS

\$134,906

On Target

\$98,705

Projected

\$36,201



MARKETING CAMPAIGN

Total Campaign Spend



\$148,090.00

Regional TV Spend

\$383,232.00

Local TV Spend

\$212,536.00

Projected

Building a Smartsheet Formula

Cells are referenced by a column name and row number.

Example: Column Name: Budget & Row: 1 = Budget1

Example: Column Name: Actual Amount & Row: 1 = [Actual Amount]1

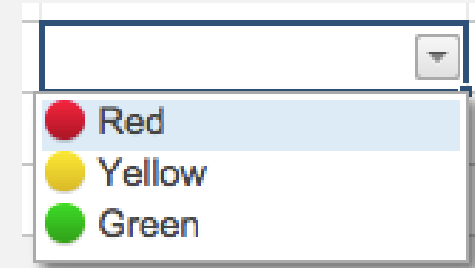
Example: Whole Column Reference: Difference:Difference

		Category and Item	Budget	Actual Amount	Difference	
1		[-] Total Project Budget	\$8,250	\$8,395	=Budget1 - [Actual Amount]1	

Building a Smartsheet Formula

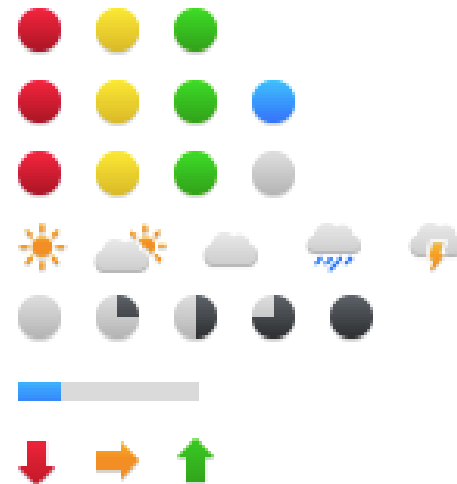
Symbols are referenced by the name of the icon.

Checkboxes, flags & stars are binary and referenced by a 1 or 0, where 1= positive.



Visual symbol

Status



Options to Create a Formula

Four ways to create a formula:

- **Use the Function icon on toolbar**
- **Type an equals (=) sign followed by formula**
- **Copy and paste or drag a formula into the cell**
- **Automatically added if there are consistent existing formulas in rows above or below**

A person is shown from the chest up, wearing a dark blue shirt, writing in a white notebook with a pen. The notebook is open, and the person's hand is visible. The entire image is covered with a semi-transparent blue overlay. The text 'Intro to Number Functions' is written in white, bold, sans-serif font on the left side of the image.

Intro to Number Functions

SUM(), COUNT()

SUM() & COUNT()

The foundation for metrics

- **SUM()** allows you to sum numbers:

=SUM(Budget1:Budget50)

- **COUNT()** allows you to count non-blank values:

=COUNT([Task name]:[Task Name])

A person is shown from the side, writing in a notebook with a pen. The image is overlaid with a semi-transparent blue filter. The text 'Intro to Hierarchy Functions' is written in a large, bold, white font, and 'CHILDREN()' is written below it in a smaller, bold, white font.

Intro to Hierarchy Functions

CHILDREN()

CHILDREN Function

Formula references simplified

- Smartsheet has a unique function that leverages the hierarchical relationships found in your sheets:
CHILDREN()
- The CHILDREN() function is paired with other functions to simplify references
=SUM(Budget8:Budget15) becomes *=SUM(CHILDREN())*



Intro to Conditional Functions

IF(), SUMIF(), COUNTIF()

IF, SUMIF & COUNTIF

Build metrics for any condition

- IF() allows you to create conditional statements and can automate your sheet in new ways:

=IF(Progress8=1,1,0)

- SUMIF allows you to sum numbers *if* they meet criteria:

=SUMIF([Cost Category]:[Cost Category], "Fixed", Budget:Budget)

- COUNTIF allows you to count matches *if* they meet criteria:

=COUNTIF(Complete:Complete, 1)

Key Takeaways

Why should you care about formulas?

Because formulas can help you...

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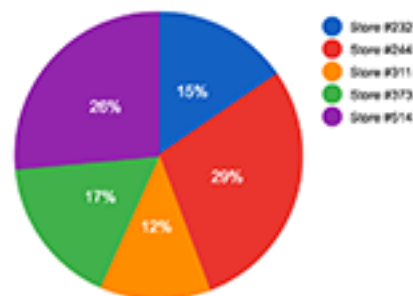
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Social Media

Print Media



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Regional Trend



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Local Trend



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Regional TV Spend

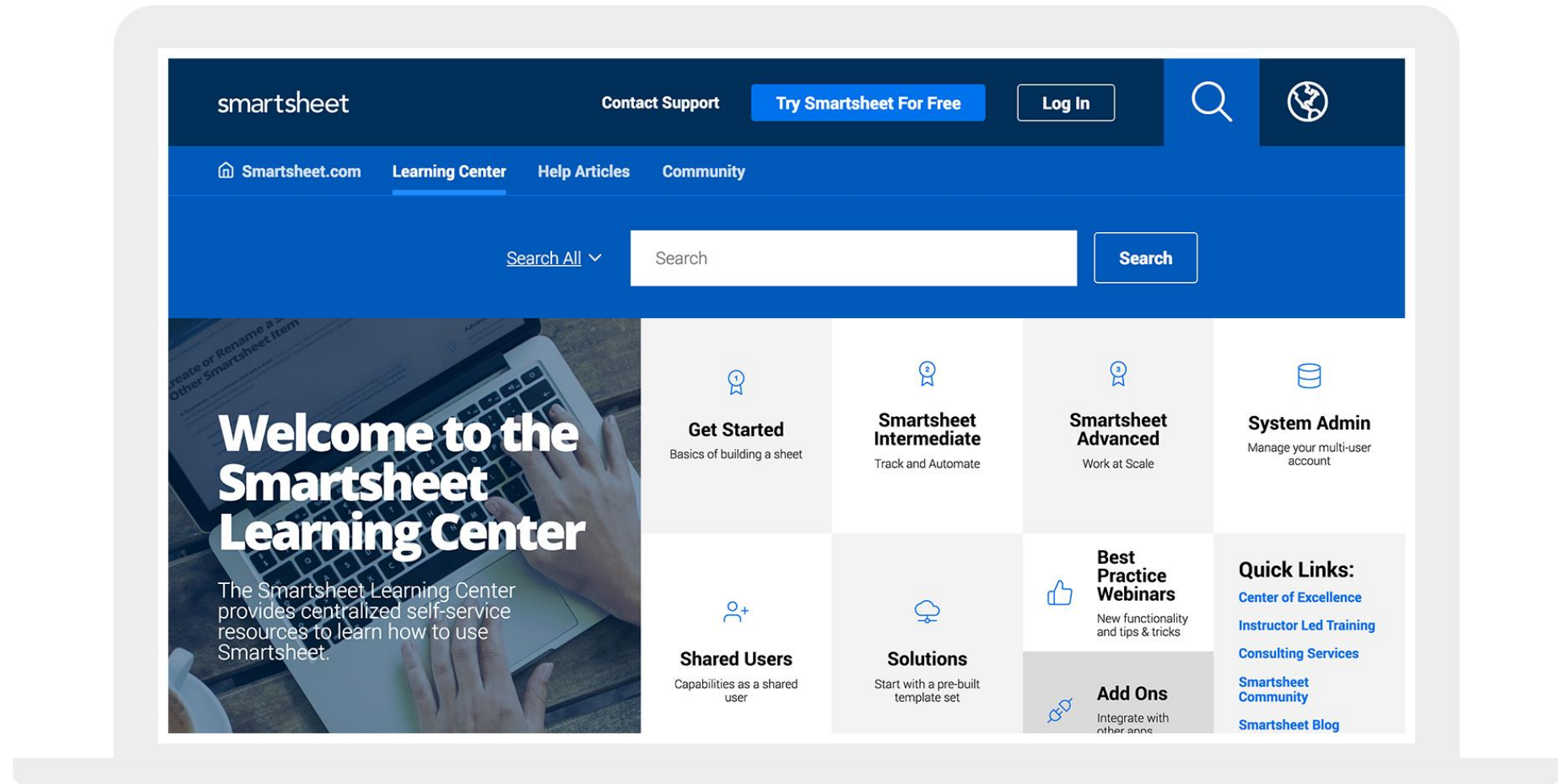
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Smartsheet Resources



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- Stop by the Smartsheet Fundamentals II booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more

