

smartsheet ENGAGE /

Smartsheet Formulas
for Beginners



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#SmartsheetENGAGE

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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

Home		Formulas ENGAGE18		Projects		Success Plan Canvas		Personal Dashboard CSM		Project Plan Dashboard Executive View		Project Plan					
File		Alerts & Actions		Forms													
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
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		■ Store Plan Alpha															
		■ Real Estate Phase															
		Real Estate Kick-Off															
		Initial Design and Real Estate Options Review															
		Initiate Site Survey, Test Fit															
		Review Tenant Criteria + Real Estate Hand off Materials															
		Review Preliminary Budget with Construction															
		Receive Real Estate Approval from Design Manager															
		Receive Approved Plan from Construction Manager															
		Real Estate Phase Completed															
		■ Design Phase															
		Revise/Refine Real Estate Test Fit to Layout															
		Create Storefront Design															
		Incorporate Design Meeting Feedback, Revise Layout/Storefront															
		Receive Storefront Approval															
		Post Approved Storefront to hub and notify architect															
		Submit Storefront for Landlord Approval															
		Design Phase Completed															



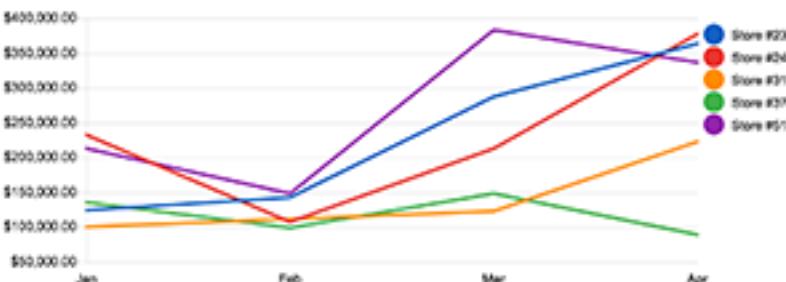
MBFCORP

SALES DASHBOARD

Quarterly Sales NW Region



Q1 Revenue by Store



OVERALL PROGRESS

\$134,906

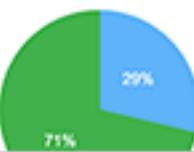
On Target

\$98,705

Projected

\$26,204

Total Campaign Spend



MARKETING CAMPAIGN

\$148,090.00

Regional TV Spend

\$383,232.00

Local TV Spend

\$212,536.00

Projected

Regional Trend
↑
Local Trend
↓

World Wide Closer

Global 2000

20

Total Sold

OUT OF 35

**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

Publish

Activity Log

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

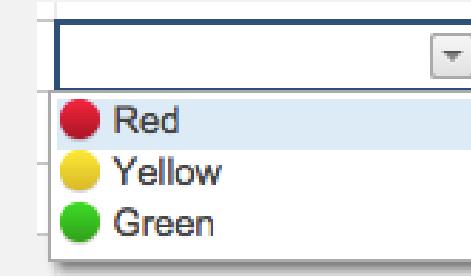
Example: Whole Column Reference: Difference:Difference

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

Building a Smartsheet Formula

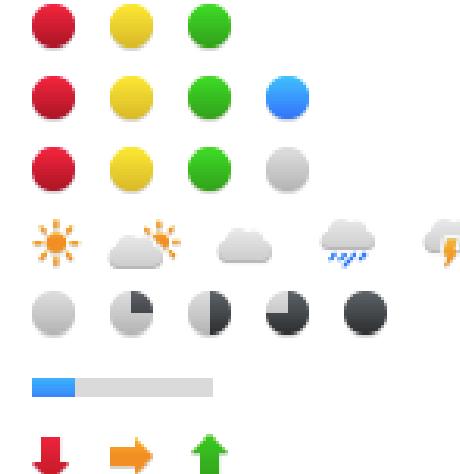
Symbols are referenced by the name of the icon.

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**

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])

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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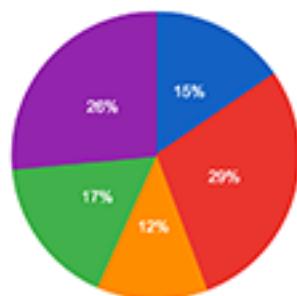
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	Complete	Status	Task Name	Assigned To	Progress	Cost Categ...	Budget	Actual	Start Date	End D
1			Metrics							
2			Total Budget	\$282,300						
3			Total Spend	\$278,000						
4			Remaining Budget	\$4,300						
5			Total Fixed Costs	\$60,050						
6			Total Tasks	32						
7			Completed Tasks	6						
8			Store Plan Alpha				\$282,300	\$278,000		
9			Real Estate Phase				\$11,550	\$11,100		
10	<input checked="" type="checkbox"/>	●	Real Estate Kick-Off	TT Thao Talente	100%	Fixed	\$0	\$0	09/15/18	09/15/18
11	<input checked="" type="checkbox"/>	●	Initial Design and Real Estate Options Review	TT Thao Talente	100%	Variable	\$6,000	\$6,000	09/18/18	09/18/18
12	<input type="checkbox"/>	●	Initiate Site Survey, Test Fit	LL Larry Learne	100%	Variable	\$500	\$550	09/21/18	09/21/18
13	<input checked="" type="checkbox"/>	●	Review Tenant Criteria + Real Estate Hand off Materials	LL Larry Learne	100%	Labor	\$5,000	\$4,500	09/26/18	09/26/18
14	<input checked="" type="checkbox"/>	●	Review Preliminary Budget with Construction	SS Sam Smart	100%	Fixed	\$0	\$0	09/28/18	10/01/18
15	<input checked="" type="checkbox"/>	●	Receive Real Estate Approval from Design Manager	SS Sam Smart	100%	Fixed	\$50	\$50	10/02/18	10/02/18
16	<input type="checkbox"/>	●	Receive Approved Plan from Construction Manager	SS Sam Smart	50%	Fixed	\$0	\$0	10/03/18	10/03/18
17	<input type="checkbox"/>	●	Real Estate Phase Completed	TT Thao Talente	20%	Fixed	\$0	\$0	10/04/18	10/04/18
18			Design Phase				\$26,000	\$25,900		

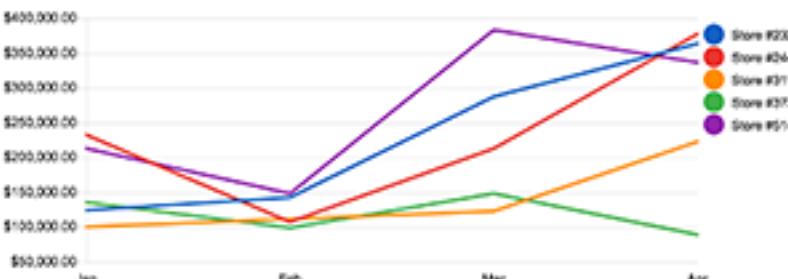
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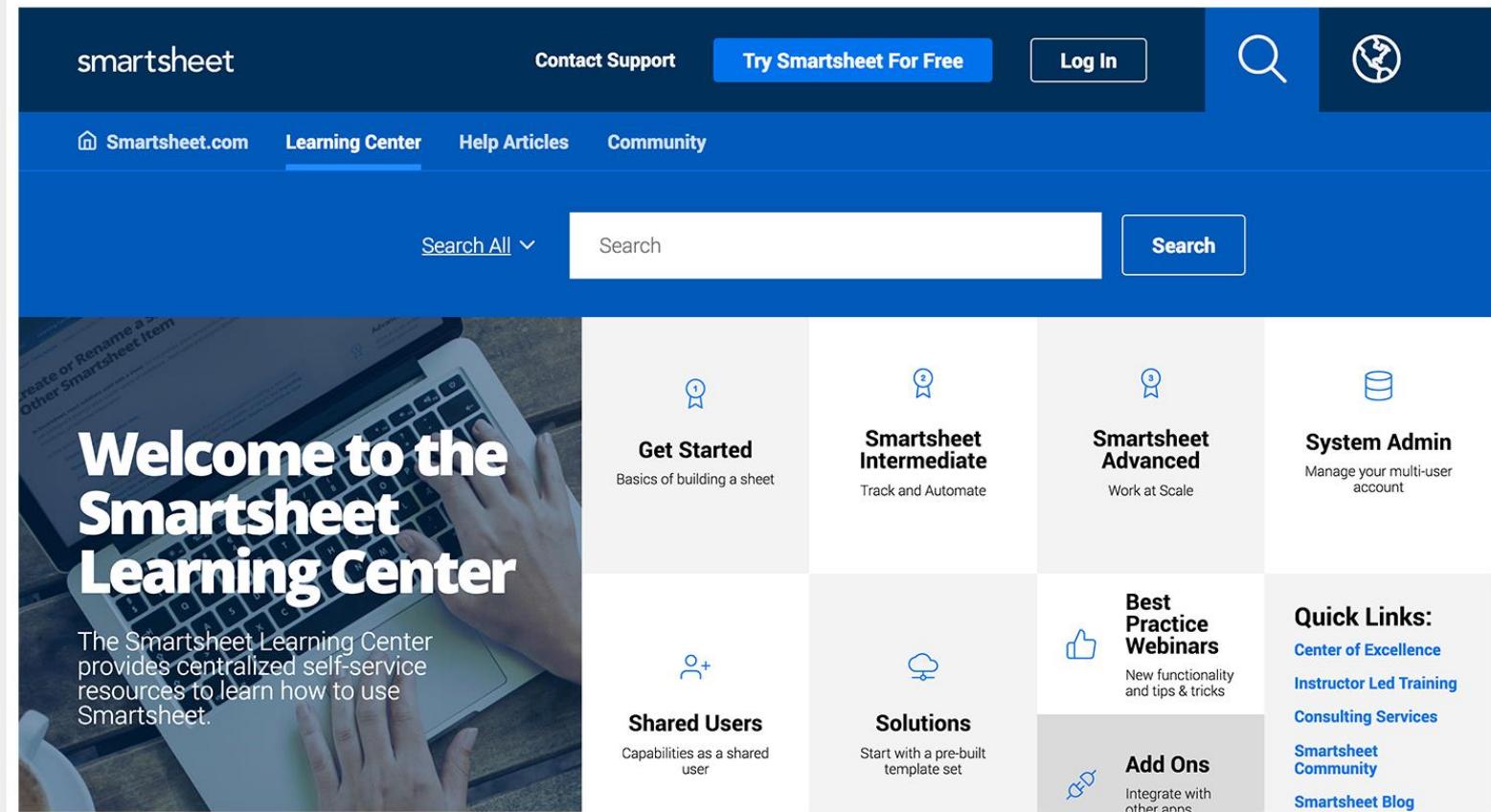


Sales Resources

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Publish**Activity Log**

Smartsheet Resources



The screenshot shows the Smartsheet Learning Center homepage. The top navigation bar includes links for Contact Support, Try Smartsheet For Free, Log In, and a search icon. Below the navigation is a secondary navigation bar with links for Smartsheet.com, Learning Center (which is underlined), Help Articles, and Community. A search bar with a dropdown for 'Search All' and a 'Search' button is present. The main content area features a large image of a person using a laptop with the text 'Welcome to the Smartsheet Learning Center'. Below this, a blurb states: 'The Smartsheet Learning Center provides centralized self-service resources to learn how to use Smartsheet.' To the right, there are eight cards arranged in a grid:

 Get Started Basics of building a sheet	 Smartsheet Intermediate Track and Automate	 Smartsheet Advanced Work at Scale	 System Admin Manage your multi-user account
 Shared Users Capabilities as a shared user	 Solutions Start with a pre-built template set	 Best Practice Webinars New functionality and tips & tricks	Quick Links: Center of Excellence Instructor Led Training Consulting Services Smartsheet Community Smartsheet Blog
 Add Ons Integrate with other apps			

www.smartsheet.com/learning-center



smartsheet ENGAGE / Q&A

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Don't forget to:

- 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



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