

# CRM Excel Formulas Cheatsheet

## Excel Function

## What It Does

## Example Formula(s)

### COUNTIF

Count how many times a certain thing appears.

=COUNTIF(E2:E100, "Website")

This counts how many times “Website” shows up in the lead source column — in this example, column E.

### VLOOKUP

Find a piece of information in a table, based on something you already know.

=VLOOKUP("Mateus Tobin", A2:B100, 2, FALSE)

This [VLOOKUP](#) finds client “Mateus Tobin” in column A and returns the value from column B, such as his phone number.

### IF

Check if something is true or false, and return a result based on that.

=IF(C2>0.7, "Hot Lead", "Cold Lead")

If the lead score in C2 is greater than 0.7, the cell displays as “Hot Lead.” Otherwise, it displays as “Cold Lead.”

### SUMIF

Add numbers only if they meet a certain condition.

=SUMIF(G2:G100, "Brian Gorman", D2:D100)

This adds up all the sales in column D where the salesperson in column G is “Brian Gorman.”

## UNIQUE

Return a list of unique values from a column.

`=UNIQUE(J2:J100)`

If column J lists company names, this will return a list of all the companies in your CRM.

## LEFT, RIGHT, MID

Pull out parts of text from the left, right, or middle of a cell.

`=LEFT(B2, 3)`

If column B lists phone numbers, this pulls just the area code from that number, such as "212."

`=MID(F2,FIND("@",F2)+1,100)`

If column F lists email addresses, this pulls just the domain from that address.

Note: "100" is the number of characters to extract. It is arbitrarily large to ensure it captures the entire domain name. If there are domain names in your data set with unusually large character counts, simply enter a larger number.

## FILTER

Pull a list of data that meets specific conditions.

`=FILTER(A2:I100, I2:I100="Active")`

This returns only rows where column I equals "Active."

Tip: Use this to create a dedicated view of just active leads or clients. Try pasting it into a new tab so that you can quickly zero in on important data, without changing your main sheet.

## DATEDIF

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Calculate the time between two dates.

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=DATEDIF(H2, TODAY(), "D")
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This returns the number of days between the last contact date in H2 and today.

Note: The use of "D" tells Excel to return the difference in days. Other options include "M" for months or "Y" for years.

## ISBLANK

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Check whether a cell is empty.

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=ISBLANK(B2)
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This returns TRUE if cell B2 is empty. If column B lists phone numbers, use this to see which leads are missing phone numbers.

## Quick Tips

**Check for Extra Spaces:** If a formula isn't working (especially lookups), double-check for extra spaces at the beginning or end of a cell. Even one extra space can throw things off.

**Drag Down to Apply:** To apply a formula to an entire column, click the cell with the formula, then hover over the bottom-right corner until you see a small plus (+) sign. Click and drag it down the column. Excel will automatically update the formula for each row.

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