39 Sample Formulas to Get You Started

Full Name Display full name value combined from multiple columns.	**Formula – Text** List(" ", [Title], [First Name], [Last Name])
Calendar Week Calculates calendar week number from the date	**Formula – Numeric** Mod((FirstDayOfPeriod([Date Column], Days(7), Date(2000, 12, 31)) - Date(2000, 12, 31)) / Days(7), 52)
Value Spelled Out Convert numbers in range of 0...999 to English text.	**Formula – Text** List("", Case(Mod(Floor([Quantity] / 100), 10), 0, null, 1, "one hundred", 2, "two hundreds", 3, "three hundreds", 4, "four hundreds", 5, "five hundreds", 6, "six hundreds", 7, "seven hundreds", 8, "eight hundreds", 9, "nine hundreds") & " ", Case(Mod(Floor([Quantity] / 10), 10), 0, null, 1, null, 2, "twenty", 3, "thirty", 4, "forty", 5, "fifty", 6, "sixty", 7, "seventy", 8, "eighty", 9, "ninety") & " ", If(Mod(Floor([Quantity] / 10), 10) = 1, Case(Mod([Quantity], 10), 0, "ten", 1, "eleven", 2, "twelve", 3, "thirteen", 4, "fourteen", 5, "fifteen", 6, "sixteen", 7, "seventeen", 8, "eighteen", 9, "nineteen"), Case(Mod([Quantity], 10), 0, null, 1, "one", 2, "two", 3, "three", 4, "four", 5, "five", 6, "six", 7, "seven", 8, "eight", 9, "nine")))
Phones Display all known phones in one column.	**Formula – Text** List("\n", "W: " & [Work Phone], "H: " & [Home Phone], "F: " & [Fax], "M: " & [Mobile])
Address Formatting Display address value combined from multiple columns.	**Formula – Text** List("\n", [Street], List(" ", List(", ", [City], [State]), [Zip]), [Country])

Round-Robin Record Assignment	**Formula – Numeric**
Evenly distributes records to a pool of queues using a simple round-robin algorithm. This scenario applies the MOD function to the [Id] column, to produce a number that repeatedly cycles between 1 and the number of users in the round robin pool (3 in this example).	Mod(ToNumber([Id]), 3) + 1
Record Aging	**Formula – Duration**
Calculates the duration a record has been open.	Today() - ToDate([Date Created])
Record Categorization	**Formula – Text**
Displays a text value of RED, YELLOW, or GREEN, depending on record age (a formula column). This formula could be used for row colorization.	If([Record Age] > Days(20), "RED", [Record Age] > Days(10), "YELLOW", "GREEN")
Record Due Date Calculation	**Formula – Date**
Sets the due date based on the priority of the record. If it is high, due date is 2 days after being opened. If it is medium, due date is 5 days after opening. Otherwise, due date is 7 days.	ToDate([Date Created]) + Case([Priority], "High", Days(2), "Medium", Days(5), Days(7))
Autodial	**Formula – URL**
Creates a URL that automatically dials the phone number when clicked. In this example, replace "servername" and "call" with the name of your dialing tool and the command it uses to dial. The column [Id] inserts the identifier for the record. The [Phone] column tells the dialing tool the number to call.	"http://servername/call?id=" & [Id] & "&phone=" & [Phone]
Flat Rate Commission Calculation	**Formula – Numeric**
Calculates a commission based on an [Amount] column and percentage. This is a simple scenario where commission is a flat 8% of amount.	[Amount] * 0.08
Rule-Based Commission Calculations	**Formula – Numeric**
Calculates a commission rate based on deal size. 9% commission paid for Large Deals.	If([Amount] > 100000, 0.09, 0.08)
Age (years old)	**Formula – Numeric**
Calculates current age in years. Subtracts birth date from today's date, resulting in a number in decimal days. Divides this number by 365 to get years. Uses floor function to drop the decimal portion.	Floor((ToDays(Today() - [Birthdate]) / 365))
Birthday This Month Indicator	**Formula – Checkbox**
Displays the value "Yes" if the contact's birthday falls in the current calendar month.	Month([Birthdate]) = Month(Today())

Identification Numbering Displays the first 5 characters of the last name and the last 4 characters of the social security number separated by a dash.	**Formula – Text** Trim(Left([Last Name], 5)) & "-" & Trim(Right([SSN], 4))
Telephone Country Code Determines the telephone country code based on the country of the mailing address.	**Formula – Text** Case([Country], "USA", "1", "Canada", "1", "France", "33", "UK", "44", "Australia", "61", "Japan", "81", "?")
Dynamic Address Formatting Displays City, State and Postal Code in standard format - depending on country.	**Formula – Text** Case([Country], "USA", List(", ", [City], List(" ", [State], [Postal Code])), "France", List(" ", [Postal Code], [City]))
Unformatted Phone Number Removes the parentheses and dash format characters from phone number. This is necessary for some auto dialer software.	**Formula – Text** Replace(Replace(Replace(Replace([Phone], "-", ""), "(", ""), ")", ""), " ", "")
Region Categorization Returns a text value of North, South, East, West, or Central based on the [State] column.	**Formula – Text** If(IsNull([State]), "None", In([State], "AK", "AZ", "CA", "HA", "NV", "NM", "OR", "UT", "WA"), "West", In([State], "CO", "ID", "MT", "KS", "OK", "TX", "WY"), "Central", In([State], "CT", "ME", "MA", "NH", "NY", "PA", "RI", "VT"), "East", In([State], "AL", "AR", "DC", "DE", "FL", "GA", "KY", "LA", "MD", "MS", "NC", "NJ", "SC", "TN", "VA", "WV"), "South", In([State], "IL", "IN", "IA", "MI", "MN", "MO", "NE", "ND", "OH", "SD", "WI"), "North", "Other")
Deal Size Categorization Displays "Large" for deals over one million dollars.	**Formula – Text** If([Price] > 1000000, "Large Deal", "Small Deal")
Invalid Discount Checks if [Discount] column is between 0 and 50%. If not, it displays an error message; otherwise it is blank.	**Formula – Text** If([Discount] > 0.50, "Error: Discount cannot exceed 50%", [Discount] < 0, "Error: Discount cannot be less than 0", "")

Month Display This formula can be applied to any date column by substituting the date column instead of the Today() function.	**Formula – Text** Case(Month(Today()), 1, "January", 2, "February", 3, "March", 4, "April", 5, "May", 6, "June", 7, "July", 8, "August", 9, "September", 10, "October", 11, "November", 12, "December","")
Day of Week Calculates today's day of the week and displays as text. This formula can be applied to any date column by substituting the date column instead of the Today() function.	**Formula – Text** Case(DayOfWeek(Today()), 0, "Sunday", 1, "Monday", 2, "Tuesday", 3, "Wednesday", 4, "Thursday", 5, "Friday", 6, "Saturday", "Error")
Mileage Expense Calculation Calculates mileage expenses associated with visiting a customer site, at 35 cents per mile.	**Formula – Numeric** [Miles Driven] * 0.35
Rules-based Status Message Uses conditional logic to display a "Payment Overdue" status message for open invoices.	**Formula – Text** If([Payment Due Date] < Today() and [Payment Status] = "UNPAID", "PAYMENT OVERDUE", "")
Shipment Tracking Integration Creates a link to FedEx, UPS, or DHL shipment tracking websites, depending on the value of a [Shipping Method] column. Note that the parameters shown in this example for FedEx, UPS, and DHL websites are illustrative and do not represent the correct parameters for all situations.	**Formula – URL** Case([Shipping Method], "FedEx", "http://www.fedex.com/Tracking?ascend_header=1&clienttype=dotcom&cntry_code=us&language=english&tracknumbers=" & [Tracking Id], "UPS", "http://wwwapps.ups.com/WebTracking/processInputRequest?HTMLVersion=5.0&sort_by=status&loc=en_US&InquiryNumber1=" & [Tracking Id] & "&track.x=32&track.y=7", "DHL", "http://track.dhlusa.com/TrackByNbr.asp?ShipmentNumber=" & [Tracking Id], "")
Skype Auto Dialer Integration Creates a URL that automatically dials the phone number via the Skype VOIP phone application. This example requires installation of the Skype application (a third-party product) on your desktop.	**Formula – URL** "callto://+" & [Country Code] & [Phone Unformatted]

Data Completeness Calculates the percent of your important record columns that are being filled. This formula column checks 2 columns to see if they are blank. If so, a zero is counted for that column. A "1" is counted for any column that contains a value and this total is divided by 2 (the number of columns evaluated).	**Formula – Numeric** (If(IsNull([Phone]), 0, 1) + If(IsNull([Email]), 0, 1)) / 2
Unit of Measure Conversion Converts kilometers to miles.	**Formula – Numeric** [Miles] / 0.6
Temperature Conversion Converts degrees Celsius to Fahrenheit.	**Formula – Numeric** 1.8 * [Degrees Celsius] + 32
Google Search Creates a Google search on [Name] column.	**Formula – URL** "http://www.google.com/search?en&q=" & URLEncode([Name])
Google News Search Creates a Google news search on [Name] column.	**Formula – URL** "http://www.google.com/news?en&q=" & URLEncode([Name])
Yahoo Search Creates a Yahoo search on [Name] column.	**Formula – URL** "http://search.yahoo.com/search?p=" & URLEncode([Name])
Yahoo News Search Creates a Yahoo news search on [Name] column.	**Formula – URL** "http://news.search.yahoo.com/search/news?p=" & URLEncode([Name])
MarketWatch Search Searches for ticker symbol and information on Marketwatch.com using [Ticker Symbol] column.	**Formula – URL** "http://www.marketwatch.com/tools/quotes/quotes.asp?symb=" & URLEncode([Ticker Symbol])
BBC News Searches for company information on BBC news on [Name] column.	**Formula – URL** "http://newssearch.bbc.co.uk/cgibin/search/results.pl?scope=newsifs&tab=news&q=" & URLEncode([Name])
CNN News Search Searches for company information on the CNN Web site on [Name] column.	**Formula – URL** "http://websearch.cnn.com/search/search?source=cnn&invocationType=search%2Ftop&sites=web&query=" & URLEncode([Name])

Bloomberg News Search Searches for Ticker Symbol of a company on the Bloomberg Web site.	**Formula – URL** "http://www.bloomberg.com/apps/quote?ticker=" & URLEncode([Ticker Symbol])
Yahoo Stock Price Chart Displays a stock price chart from Yahoo Financials, based on the ticker symbol stored in [Ticker Symbol] column.	**Formula – URL** "http://ichart.yahoo.com/t?s=" & URLEncode([Ticker Symbol])