

# Calculations

Help Guide

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# 1. Using Calculation

Calculations can be created in forms to produce variations of data and/or calculate an alternative outcome based on user inputs. Calculations allow you to apply a formula using one or more fields to return new values based on the data entered. This can be used for simple to complex maths calculations, identifying the difference in days or times, calculating dates, among other uses. Calculations can also be used to create text responses based on conditions.

For example, if the form filler has entered their date of birth, a simple calculation can tell us what their age is on a certain date.

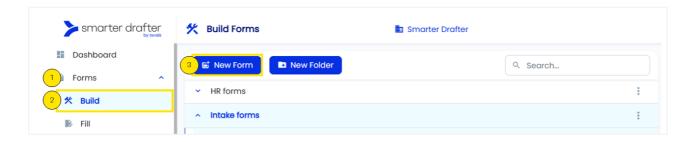
Calculations can be used to manipulate any field type and return alternate data. For example, you can split out date components to tell you the day of week, month or year. You can also calculate the time between dates, and return a measurement in days, weeks, months or years.

Let's look at some examples of calculations.

### 1.1 Add Calculations to a Form

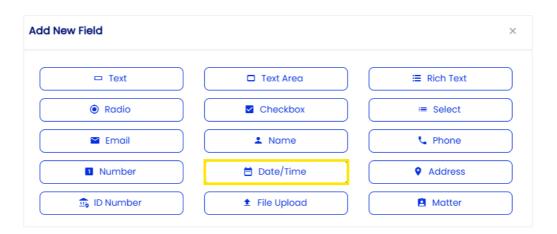
In this example, a form will be created which contains a date of birth field for a child. This will be used to calculate a new date. Start by creating a form.

- 1. Click Forms.
- 2. Click Build.
- 3. Click New Form.

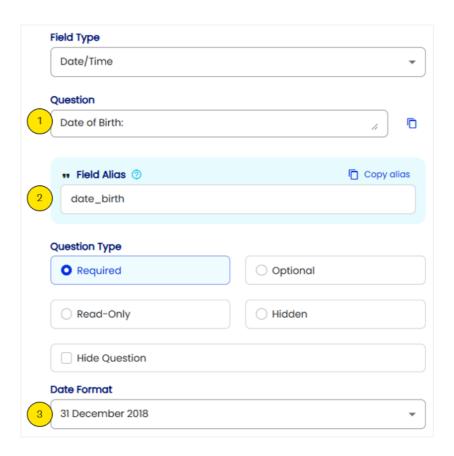




4. Add a Date/Time field.



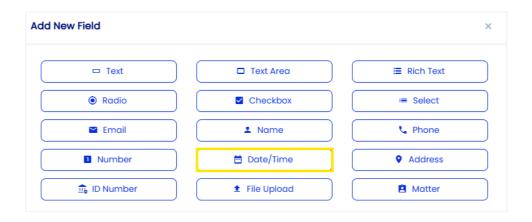
- 1. Add a Question
- 2. Add a Field Alias.
- 3. Scroll down and select a Date Format to display. In this example, the format is: 31 December 2018.





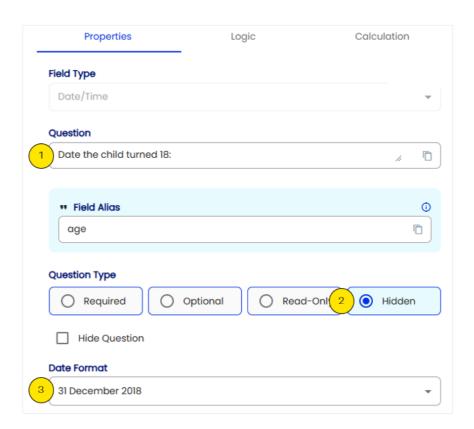
### 1.2 Add a Second Calculation to a Date Field

To create a calculation, two fields must interact. Another Date/Time field will be added to the form underneath the Date of Birth field.



Set Properties to this field:

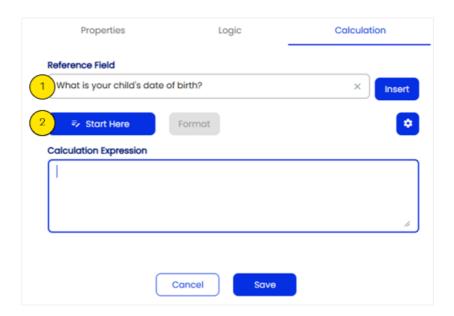
- 1. Add a Question: Date the child turned 18.
- 2. Make the Question Hidden.
- 3. Select a Date Format.



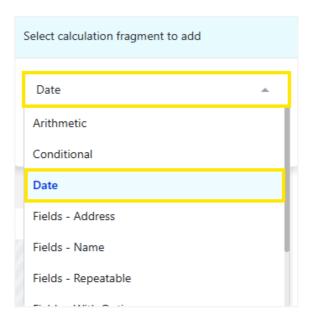


Open the Calculation tab. The calculation that will be added here will find the date that the child turned 18.

- 1. Select the Reference Field. (This is the field that the calculation will be based on.)
- 2. Click Start Here.

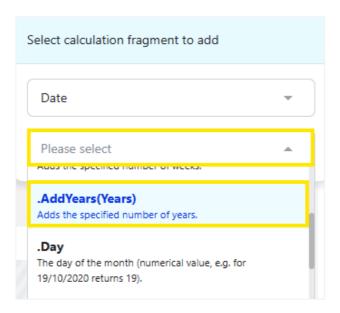


3. A pop up opens. There are two drop-down lists – these are used to build the calculation. Select **Date** in the top menu, as we are calculating a date in the future.

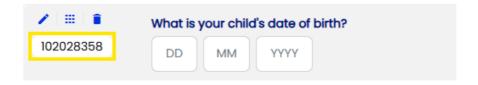




4. In the second menu, the command will be selected. For this example, we wish to add 18 years to the date of birth, so the AddYears command will be used.



5. Now add parameters. In the Target: Date field, the field ID number is placed. To find the field ID number, look at the field with the question, "What is your child's date of birth?". The field ID number is in the bottom left corner (look at the example below: the ID is 102028358). Olick the number to copy it to the clipboard.

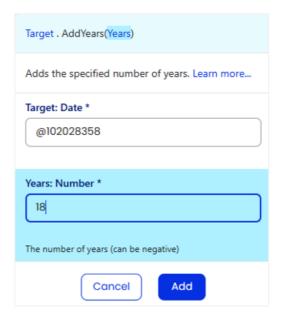


6. Paste the field ID number in the Target:Date field.

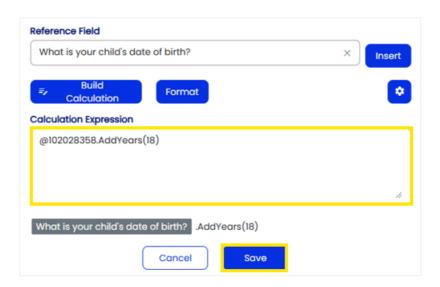




7. In the **Years: Number** field, we must add the number of years to be added to the target date. The number of years to be added is 18.



- 8. The Calculation Expression is created for you by Smarter Drafter and shown in the builder.
- 9. Click Save.





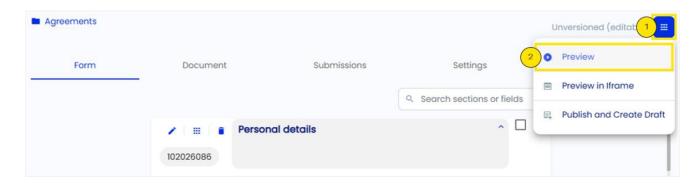
10. The calculation field is now built into the form, underneath the question, "What is your child's date of birth?". The field is hidden, so it will not be visible when the form is filled out as there's no need for the form filler to see this. It will be visible in the submission, after the form is submitted.



### 2. Test the Form

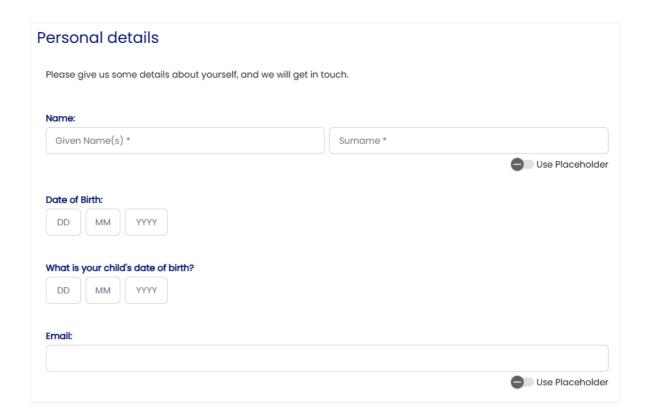
If we preview this form, we will not see the hidden field. It will be filled out, and the calculation field will deliver data in the submission. Let's see how it works.

- 1. Click the waffle button.
- 2. Click Preview.





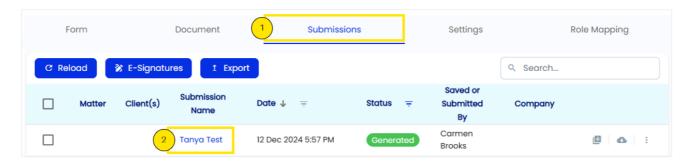
3. We can now see the form, ready to be filled out. The age calculation field is set to be hidden, so we do not see it here, but it is embedded underneath the child's date of birth field. Fill in the form and click Submit Form.



# 2.1 Open the Submission

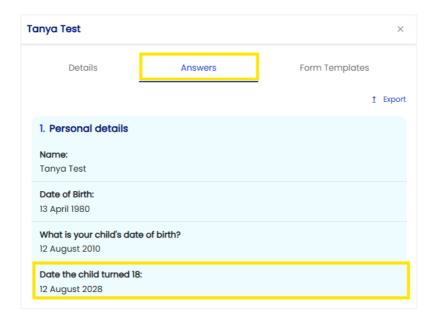
When the form is filled out and submitted, the data can be viewed in the **Submissions** tab. In this example, the name of the contact in the form is Tanya Test.

- 1. Click the Submission tab.
- 2. Click the Submission Name (Tanya Test).





3. The submission opens, and the responses can be viewed in the right-hand side of the screen. The hidden calculation field can be seen here, where the date the child reaches 18 is calculated (in this example, the child is currently under 18, so the date is in the future).



Note: A similar calculation can be used to calculate months after a date, using .AddMonths(Months).

# 3. Use Address Calculations

Address calculations can be used to extract a part of an address. This is useful to identify if an address falls within a legal jurisdiction, for example.

Let's look at how to use this type of address calculations, with this address field as the example (target field ID: 102188015):

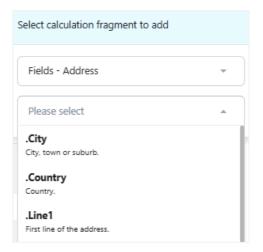




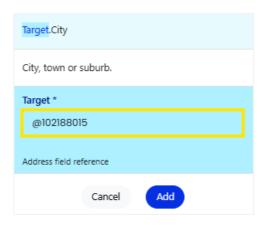
# 3.1 Calculate the City

To extract a city/suburb name by performing an address calculations:

- 1. Create a **new field** underneath the address field.
- 2. Select **Text** for the field type and set the field to **read-only**. This will show the field to the form filler, but not allow it to be typed in.
- 3. Click the Calculation tab.
- 4. Click Start Here. Select Fields Address from the first list.
- 5. Select .City from the second list.



6. The **Target field** needs to be populated with the field ID for the target address field (above). Click to copy the field ID (in this example, 102188015).





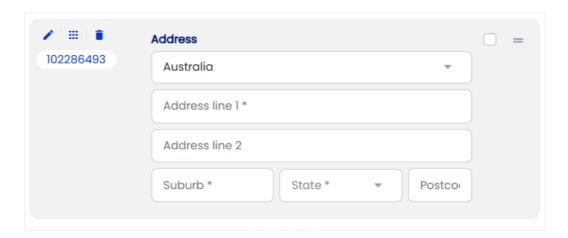
7. The calculation expression is created in the Calculation Expression field.



- 8. You can target a different part of the address by using a different fragment of the address. For example, the extract the country, do the same process above, but use .Country. Here's a full list of the fragments available:
  - .City
  - .Country
  - .Line1
  - .Line2
  - .Postcode
  - State

# 3.2 Calculate Eligibility based on State of Residence

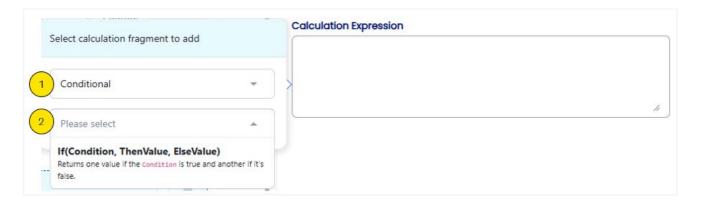
In this example, conditional calculation will be applied to a calculated field to inform a form filler whether they are eligible for a program, based on their state. An address field is added, followed by a hidden calculated field to identify the state:





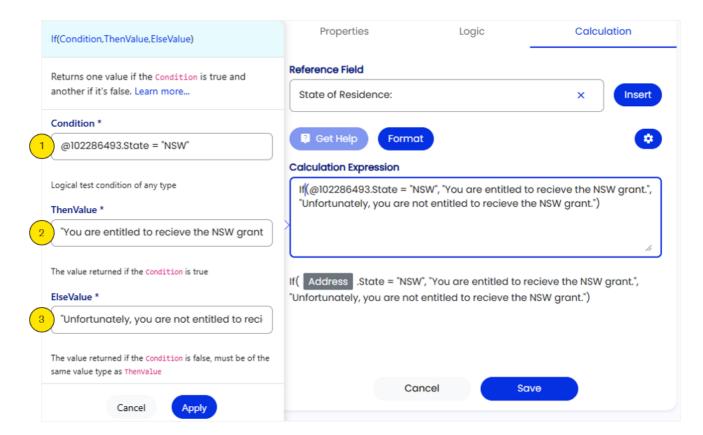
The conditional calculation tab is set up as follows.

- 1. Start by selecting a conditional type of calculation in the first drop-down list.
- 2. Select an "If" condition in the second drop-down list.



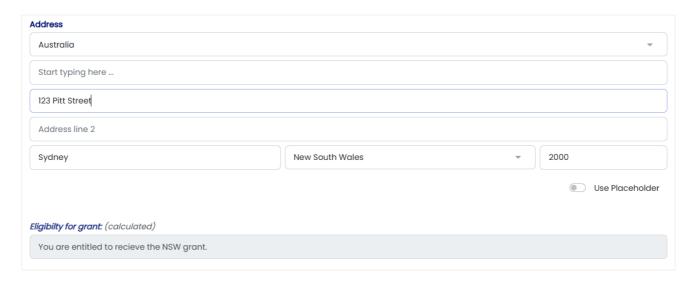
Add further conditional details.

- 1. Include the target ID field, the part of address to be addressed, and an operator of "=" and a value of "NSW".
- 2. In ThenValue, enter the message to be shown if the address is in NSW.
- 3. In ElseValue, enter the message to be shown if the address is not in NSW. Click Apply.





In the finished form, the calculated field looks like this:



### 3.3 Conditional Address Calculation

1. In this example, we will create a field that returns the capital city of the state that is selected in the address. To do this, some conditions need to be added in the Calculation Expression, as follows:

```
If(@101392295.State = "ACT", "Canberra",
If(@101392295.State = "NSW", "Sydney",
If(@101392295.State = "NT", "Darwin",
If(@101392295.State = "QLD", "Brisbane",
If(@101392295.State = "SA", "Adelaide",
If(@101392295.State = "TAS", "Hobart",
If(@101392295.State = "VIC", "Melbourne",
If(@101392295.State = "WA", "Perth", ""))))))))
```

```
Calculation Expression

If(@101392295.State = "ACT", "Canberra",
If(@101392295.State = "NSW", "Sydney",
If(@101392295.State = "NT", "Darwin",
If(@101392295.State = "QLD", "Brisbane",
If(@101392295.State = "SA", "Adelaide",
```

In the finished form, the read-only field will display the capital city of the selected state.



# 4. Counting

If data has been captured via a radio button set or other type of option set, that data can be used to perform calculations. There are four calculation types:

#### Count

Count the number of options available in a radio/select/checkbox list and/or Count the number of options selected in a checkbox multi select list

#### Max

Display the option with the maximum value in a radio/select/checkbox list and/or Return the value of the maximum option selected in a checkbox multi select list

#### Min

Display the option with the minimum value in a radio/select/checkbox list and/or Return the value of the minimum option selected in a checkbox multi select list

#### Sum

Calculate the sum of all options in a radio/select/checkbox list and/or Calculate the sum of the options selected in a checkbox multi select list

Here's an example:



The data above can be used in several types of calculations.

1. The .Max calculation will return the maximum number in the above option set. To use the calculation, target the field ID (101391826), and add the expression, as shown:

@101391826.Options.Max	
	,



This calculation expression will return the maximum number offered by the option set – in this example, 6.



2. Here's an option set of check boxes against the days of the week.



This data can be used in a calculation to return the maximum possible days available:



This field will present in the filled form as follows:

Result for checkbox - Days available: (calculated)

5

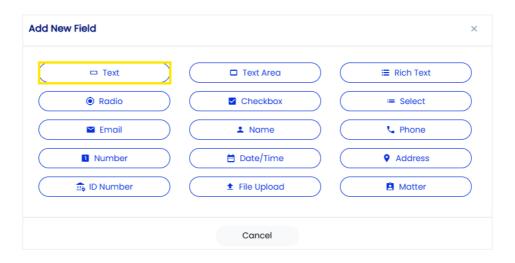


# 5. Date Calculations

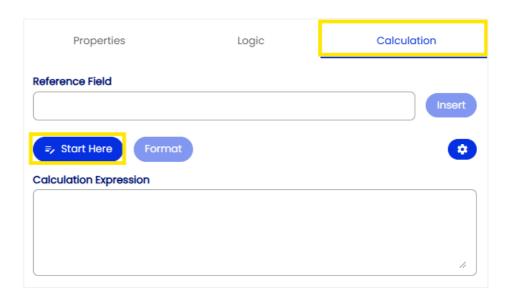
# 5.1 Find the name of the day of the week

This calculation will show the day of the week of a certain date.

1. Create a new text field.

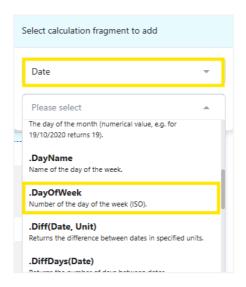


- 2. In the new field editor, click Calculation this will open the calculation builder.
- 3. Click Start Here to begin building the calculation.

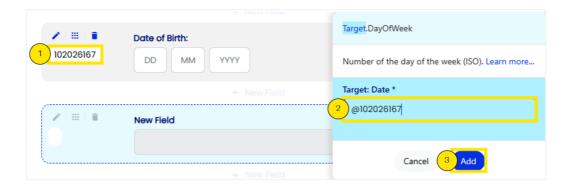




- 1. Select Date.
- 2. Select DayofWeek. This will return the number of the day of the week, starting with Monday at 1.

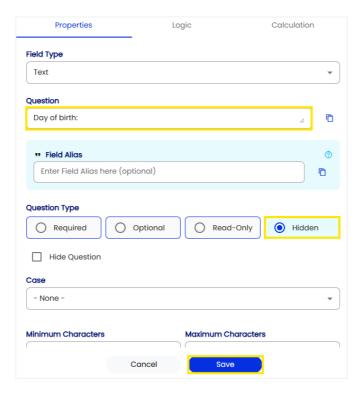


- 4. In the Target: Date, you may click a field reference number to copy it, and
- 5. Paste it into the Target: Date field. You may also type "Today" in the Target: Date field, which will find the day of the week for today.
- 6. Click Add.

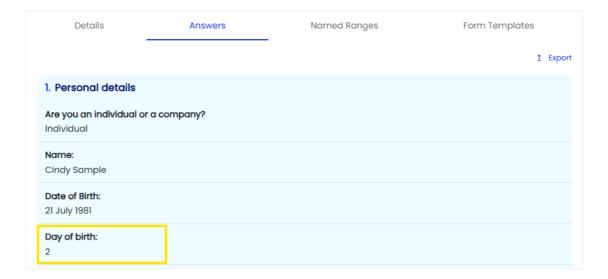




- 7. In the Properties tab, give the field a Question (to identify the contents of the field).
- 8. Make a calculation field Read-Only or Hidden.
- 9. Click Save.

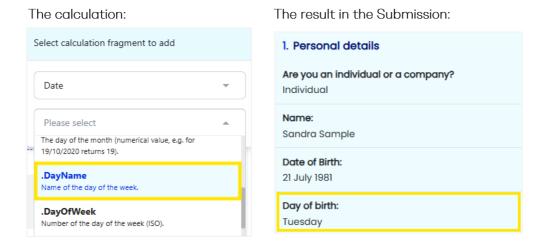


Results: If the form is filled by someone with a date of birth of 21st July 1981, the **Answers** screen on the **Submission** would show the Day of birth is 2 (which represents Tuesday).



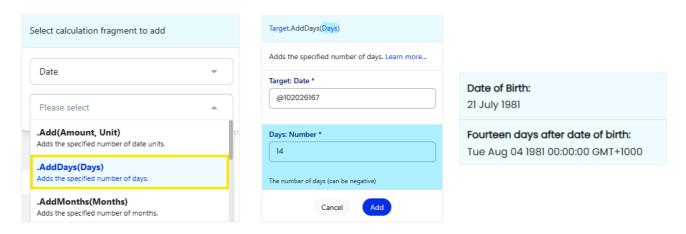


Alternatively, if we were to use the .DayName calculation in a similar way, the name of the day of a given date would be returned.



### 5.2 Adding Days

We can calculate what date would occur a certain number of days from a given date by using the .AddDays(Days) calculation. In this example, we will add 14 days to the date entered in the Date of birth field (identified by its field ID number). A date 14 days after the date of birth is returned in the Submission:



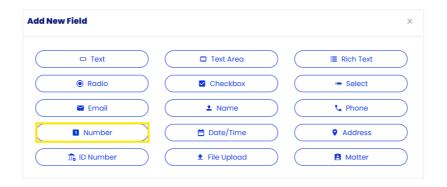
Note: To perform a subtraction, follow the steps above and put a minus sign in front of the number. For example '-14' will return a date two weeks in the past.



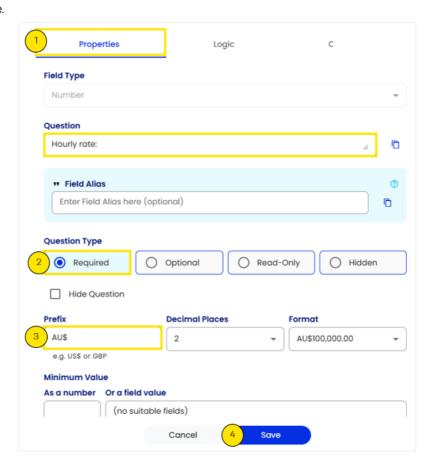
# 6. Number Calculations

Smarter Drafter can complete arithmetic within a form. Here's a simple example that calculates an employee's pay based on the hourly rate multiplied by the hours worked.

First, create a field to capture the hourly rate. Create a Number field.



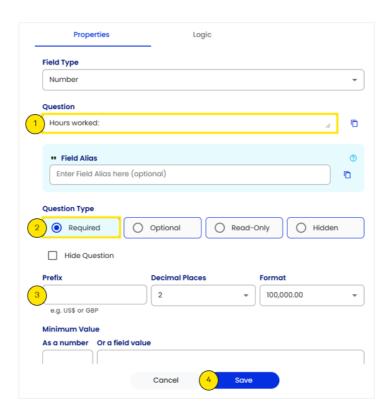
- 1. Open the Properties tab.
- 2. Add a Question to prompt the form filler to enter the hourly rate.
- 3. Since this is a pay calculation, select a currency as the Prefix.
- 4. Click Save.





A second Number field is required to do this calculation because we need to input the hours worked.

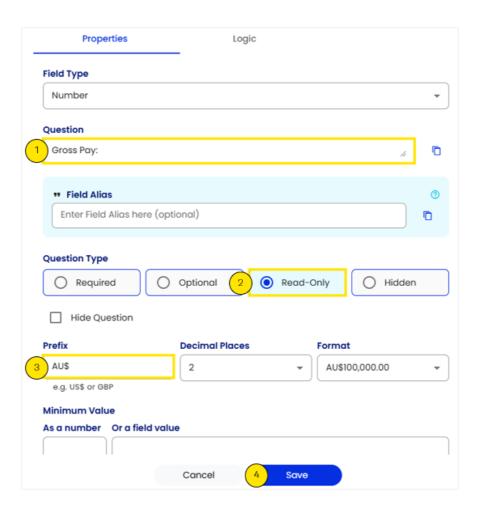
- 1. Add a Question to prompt the form filler to enter the data.
- 2. This Question Type is Required to complete the calculation.
- 3. No Prefix is required for hours.
- 4. Click Save.





We can now create a calculation field, to multiply the hourly rate by the hours worked.

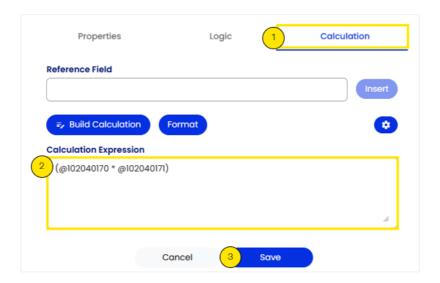
- 1. The Question is 'Gross Pay', which is the calculation output.
- 2. This Question Type is Read Only, as it is the calculation.
- 3. The **Prefix** for the output is a currency.
- 4. Click Save.





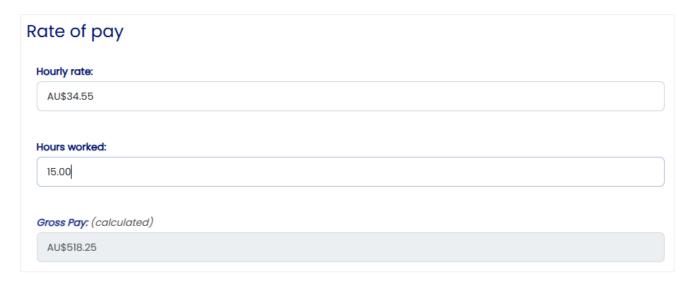
To create the calculation:

- 1. Open the Calculation tab.
- 2. Copy and paste the field IDs to build the calculation. Place the field IDs in parenthesis and use an asterisk to give the command to multiply the contents of the fields.
- 3. Click Save. This form can now be tested.



### 6.1 Fill in the Form

When this form is filled in, the hourly rate entered will be multiplied by the hours worked and displayed in the read-only **Gross Pay** field.





# 7. String Calculations

Smarter Drafter can perform string queries and manipulations. The following string methods are very useful for providing custom validation for users' answers and creating highly tailored field labels and rich text field guidance.

Note: "String" is term that means a series of characters. A name, address, email address, phone number or sentence – these are all examples of strings, because they are made up of characters.

To create a string calculation, we reference the field (@reference#) and apply the method code with a similar syntax. For example: @123456789.Method.

In addition, we can add a question mark (?) to indicate that the argument is optional.

Let's look at some examples:

### 7.1 IndexOf

The IndexOf() method finds a defined search term within a target string, and compares it to an index. IndexOf() will return the index of the first character of the search term's first occurrence within the target string or zero if the search term is not found. It will return zero when the search term is an empty string or a field that is unanswered or hidden by logic.

For example: A field in your form asks a form filler to list their assets. You could create an IndexOf calculation to identify if they have listed "real estate".

The final syntax would look like this: @123456789.IndexOf("real estate") = 1.

We can continue to add other asset classes, and continue the hidden field attached to the calculation would be populated by the number one if the form filler entered the words "real estate".



### 7.2 Includes

The Includes() method is very similar to the IndexOf() method. The only difference is that the Includes method returns 1 (representing true) if the search term is found within the target string, instead of the index of the search term.

Includes() also returns zero if the search term is not found, including when the search term is an empty string or a field that is unanswered or hidden by logic.

For example, in the calculation below, we are searching a field (ID: 101391606) which contains part of an address (Street or Avenue).

- The resulting expression: @101391606.Includes("Avenue") = 1.
- We could add a second calculation for a @101391606.lncludes("Street") = 0.



### 7.3 CharCodeAt

The CharCodeAt() method returns a UTF-16 decimal code unit of the character at the specified index. For characters with codes between 0 and 127 UTF-16 code unit is the same as the ASCII code. For example, 'A' = 65, 'Z' = 90, 'a' = 97 and 'z' = 122.

If the index is out of range or a field hidden by logic or unanswered, the method returns null. CharCodeAt() is useful for validating text field answers when a specified format is required – for example, a specific combination of letters and numbers or a slash '/' or dash '-' in a specific position.

For example: A field (ref: 101391605) captures a first name. The name entered is Gary.

• Syntax: @101391605.CharCodeAt(1)

The output in the calculation field = 71.

Here's the full code used:



Decimal	Binary	Octal	Hex	ASCII	Decimal	Binary	Octal	Hex	ASCII	Decimal	Binary	Octal	Hex	ASCII	Decimal	Binary	Octal	Hex	ASCII
0	00000000	000	00	NUL	32	00100000	040	20	SP	64	01000000	100	40	@	96	01100000	140	60	•
1	00000001	001	01	SOH	33	00100001	041	21	!	65	01000001	101	41	Α	97	01100001	141	61	а
2	00000010	002	02	STX	34	00100010	042	22	a	66	01000010	102	42	В	98	01100010	142	62	b
3	00000011	003	03	ETX	35	00100011	043	23	#	67	01000011	103	43	С	99	01100011	143	63	С
4	00000100	004	04	EOT	36	00100100	044	24	\$	68	01000100	104	44	D	100	01100100	144	64	d
5	00000101	005	05	ENQ	37	00100101	045	25	%	69	01000101	105	45	E	101	01100101	145	65	е
6	00000110	006	06	ACK	38	00100110	046	26	&	70	01000110	106	46	F	102	01100110	146	66	f
7	00000111	007	07	BEL	39	00100111	047	27	1	71	01000111	107	47	G	103	01100111	147	67	g
8	00001000	010	80	BS	40	00101000	050	28	(	72	01001000	110	48	Н	104	01101000	150	68	h
9	00001001	011	09	HT	41	00101001	051	29	)	73	01001001	111	49	1	105	01101001	151	69	İ
10	00001010	012	0A	LF	42	00101010	052	2A	*	74	01001010	112	4A	J	106	01101010	152	6A	j
11	00001011	013	0B	VT	43	00101011	053	2B	+	75	01001011	113	4B	K	107	01101011	153	6B	k
12	00001100	014	0C	FF	44	00101100	054	2C	,	76	01001100	114	4C	L	108	01101100	154	6C	1
13	00001101	015	0D	CR	45	00101101	055	2D	-	77	01001101	115	4D	M	109	01101101	155	6D	m
14	00001110	016	0E	SO	46	00101110	056	2E		78	01001110	116	4E	N	110	01101110	156	6E	n
15	00001111	017	0F	SI	47	00101111	057	2F	1	79	01001111	117	4F	0	111	01101111	157	6F	0
16	00010000	020	10	DLE	48	00110000	060	30	0	80	01010000	120	50	P	112	01110000	160	70	р
17	00010001	021	11	DC1	49	00110001	061	31	1	81	01010001	121	51	Q	113	01110001	161	71	q
18	00010010	022	12	DC2	50	00110010	062	32	2	82	01010010	122	52	R	114	01110010	162	72	г
19	00010011	023	13	DC3	51	00110011	063	33	3	83	01010011	123	53	S	115	01110011	163	73	S
20	00010100	024	14	DC4	52	00110100	064	34	4	84	01010100	124	54	T	116	01110100	164	74	t
21	00010101	025	15	NAK	53	00110101	065	35	5	85	01010101	125	55	U	117	01110101	165	75	u
22	00010110	026	16	SYN	54	00110110	066	36	6	86	01010110	126	56	V	118	01110110	166	76	V
23	00010111	027	17	ETB	55	00110111	067	37	7	87	01010111	127	57	W	119	01110111	167	77	W
24	00011000	030	18	CAN	56	00111000	070	38	8	88	01011000	130	58	X	120	01111000	170	78	X
25	00011001	031	19	EM	57	00111001	071	39	9	89	01011001	131	59	Υ	121	01111001	171	79	y
26	00011010	032	1A	SUB	58	00111010	072	3A	:	90	01011010	132	5A	Z	122	01111010	172	7A	Z
27	00011011	033	1B	ESC	59	00111011	073	3B	;	91	01011011	133	5B	[	123	01111011	173	7B	{
28	00011100	034	1C	FS	60	00111100	074	3C	<	92	01011100	134	5C	1	124	01111100	174	7C	1
29	00011101	035	1D	GS	61	00111101	075	3D	=	93	01011101	135	5D	1	125	01111101	175	7D	}
30	00011110	036	1E	RS	62	00111110	076	3E	>	94	01011110	136	5E	٨	126	01111110	176	7E	~
31	00011111	037	1F	US	63	00111111	077	3F	?	95	01011111	137	5F	_	127	01111111	177	7F	DEL

### 7.4 SubStr

The SubStr() method extracts a substring of up to a defined number of characters from the target string starting at a certain point. If the starting point is negative, the counting starts from the end of the string.

The length of the string is optional and if it is:

- not provided,
- exceeds actual string length, or
- is a field hidden by logic or unanswered.

All characters from the starting point to the end of the target string are returned.

For example: This example is going to return characters 10-12 of the address. The address is: Level 8, 100 George Street, Parramatta NSW 2150

- Syntax: @101391606.SubStr(10, 3)
- Output: 100, because the string starting point is 10, and the string length is 3.



### 7.5 Left/Right

The Left() method returns the first number of characters of a string – as in, it starts on the left. If the number of characters is an unanswered field or is less than zero it's treated as if it was zero. If it exceeds the string's length, it's treated as if it was equal to the length.

For example: a field (id: 101391606) has captured an address and we want to return the first 7 characters of the address. The address is: Level 8, 100 George Street, Parramatta NSW 2150

• Syntax: @101391606.Left(7)

• Output: Level 8

The Right() method returns the last number of characters of a string - it starts on the right.

For example: a field (id: 101391606) has captured an address and we want to extract the last 4 characters of the address. The address is: Level 8, 100 George Street, Parramatta NSW 2150

Syntax: @101391606.Right(4)

• Output: 2150

### 7.6 Length

Returns the strings length, i.e. the number of characters that make up the string.

For example: a field (id: 101391606) has captured an address and we want to return the length of the address. The address is: Level 8, 100 George Street, Parramatta NSW 2150

• Syntax: @101391606.Length

• Output: 47

### 7.7 Concatenation

Strings can be concatenated (joined or linked together) with the '+' operator.

For example, a text field captures a place of work (id: 101033490) and "Friendly Lawyers" is entered. It can be joined with a text field that captures an occupation (id: 101033491) and "Lawyer" is entered.

• Syntax: @101033490+@101033491

• Output: Friendly Lawyers Lawyer

If only one operand is a string, all other operands are converted to strings.