



Formula fields

Available only in Enterprise edition

Zoho Sign's formula fields allow users to automate calculations based on the information entered by the signer in other document fields. By leveraging these fields, businesses can dynamically update values, minimize calculation errors, and present consistent data, which is critical for legal business documentation.

Zoho Sign's formula fields support all the standard mathematical operators, evaluation of mathematical inequality (<, >, <>, <=, and >=), date functions, and number functions.

Let's consider a scenario where a hospital is processing a patient's discharge form. Zoho Sign's formula fields can instantly calculate the exact amount the insurance covers, as well as how much the patient needs to pay based on the specific coverage plan. This ensures that the patient sees accurate costs upfront, reducing confusion or disputes later, and helps the clinic avoid manual billing errors by ensuring all financial details are automatically updated and correct.

Date functions

Function name	Description
<code>DayDiff(date1, date2)</code>	Calculates the difference between the two date fields, date 1 and date 2. Example: <code>DayDiff(2024-12-25, 2024-01-01)</code> Result: 359
<code>MonthDiff(date1, date2)</code>	Calculates the difference in months between the two date fields. Example: <code>MonthDiff(2024-12-01, 2023-01-01)</code> Result: 23
<code>YearDiff(date1, date2)</code>	Calculates the number of years between two specified dates. Example: <code>YearDiff(2024-12-25, 2020-12-25)</code> Result: 4
<code>AddDays(date, number)</code>	Calculates the number of days, number, to be added to the specified date, date.

	<p>Example: AddDays(2024-01-01, 10) Result: 2024-01-11</p>
<i>AddMonths(date, number)</i>	<p>Calculates the number of months, number, to be added to the specified date, date.</p> <p>Example: AddMonths(2024-01-01, 6) Result: 2024-07-01</p>
<i>AddYears(date, number)</i>	<p>Calculates the number of years, number, to be added to the specified date, date.</p> <p>Example: AddYears(2024-01-01, 2) Result: 2026-01-01</p>
<i>Now()</i>	Returns the current date and time when the formula was evaluated.

Mathematical functions

Function name	Description
<i>Abs(number)</i>	Returns the absolute value (non-negative value of the number, irrespective of the sign) of the number.eg. -10 -> 10
<i>Round(number)</i>	Round the number “number” to nearest integer. eg. 10.3 -> 10, 10.6 -> 11
<i>RoundUp(number)</i>	Round up the number “number”. eg. 10.3, 10.6 -> 11
<i>RoundDown(number)</i>	Round down the number “number”. eg. 10.3, 10.6 -> 10
<i>Min(number1,number2)</i>	Returns the smaller of the two numbers “number1” and “number2”.
<i>Max(number1,number2)</i>	Returns the larger of the two numbers “number1” and “number2”.

Let us consider the scenario where a patient at a hospital has a total treatment cost of \$1,000. Their insurance covers 80% of the treatment, and the patient is responsible for the remaining 20%. Using formula fields, the clinic automatically calculates that the insurance will pay \$800 (80% of \$1,000), and the patient’s out-of-pocket cost will be \$200 (20% of \$1,000).

Formula

$$[\text{Total treatment cost (T)}] * (1 - ([\text{Insurance coverage (C)}] / 100))$$

Assigning formula fields to a document

1. Set up the recipient workflow. [Learn how to setup recipient workflows in Zoho Sign.](#)
2. In the document viewer page, drag and drop the formula field.
3. Click the formula field, then click **Configure** on the panel that appears.
4. Configure the formula using the fields with the respective mathematical operators.

 At least one formula operator or function must be present between any two fields.
Supported field types: Text, Date, Formula.

Advanced formula fields and functions

You can use conditional formulas to automatically adjust the information displayed in a document based on specific inputs provided by the recipient. By setting predefined conditions and applying different mathematical operators, you can create dynamic, adaptive fields that respond to the data entered in the previous fields.

Let's consider a scenario where you work at a real estate agency and send out property contracts to clients. You want to automatically calculate a discount based on the total property value in the contract.

If the property value is greater than \$ 500,000 and less than \$600,000 , then the discount is 5%. If it is greater than \$600,000, then the discount is 7%, if it is less than \$500,000 and greater than \$250,000 then the discount is 3%, if it is less than \$250,000 then there is no discount.

Add conditional formula

If >

 Duplicate |  Delete

All ▾ of the condition(s) are met

Property value ▾ Is greater than ▾ 500000 + -

Property value ▾ Is less than ▾ 600000 + -

Perform

[Edit](#)

[Property value] - [Property value] * 0.05

+ Add

Else if >

 Duplicate |  Delete

All ▾ of the condition(s) are met

Property value ▾ Is greater than ▾ 600000 +

Perform

[Edit](#)

[Property value] - [Property value] * 0.07

+ Add

Else if ▾

 Duplicate |  Delete

All ▾ of the condition(s) are met

Property value ▾ Is less than ▾ 500000 + -

Property value ▾ Is greater than ▾ 250000 + -

Perform

[Edit](#)

[Property value] - [Property value] * 0.03

+ Add

Else

When none of the conditions are met

Perform

[Edit](#)

[Property value]

Adding and configuring advanced formula fields in a document

1. Set up the recipient workflow. [Learn how to setup recipient workflows in Zoho Sign.](#)
2. In the document viewer page, drag the formula field.
3. Click the field and on the pane that appears towards the right, click **Configure**.
4. Click **Advanced formula**. Here, you can use the **If** or **If Else** condition to change the mathematical operators corresponding to the data that is being entered.
5. Click **Save**.

 **Supported field types:** Text, Dropdown, Checkbox, Radio group, Formula