

10 steps to create calculating form in Word

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Network administration When performing mathematical expressions we often switch to using Excel, but Word can also handle low-level expressions.

This process is not necessarily intuitive, however, it is very simple when we know how to use the right tools. If we store values and formulas on the field of a Word Form, Word can apply a data type to that data instead of viewing all the data as normal text. Form fields can store static functions and formulas. Bookmarking this form's field we will be able to enter the bookmark name in the formula, more importantly, can use them as variables. In this example, we will create a Sales Form that performs the total calculation, however, the steps are similar when creating a Form that performs another task, only the values and formulas are different. .

Step 1: Determine needs

The first step in creating a calculating form is to determine the values to store and this Form method determines those values by the mathematical method. Suppose we want to create a Word document to calculate the total purchase price of a particular item, in this case, the following information may be used:

1. **Price** (Product price).
2. **Quantity** .
3. **Tax** (Tax applies if applicable).

This information will be different in each task, however, before embarking on it, it is necessary to determine the static values that this Form needs to store and calculate.

Step 2: Add calculations

Referring to static values in formulas (step 1), we can calculate additional information. Before starting to enter operators and operands, we should determine the calculation formulas to use. In this Form Sales example, we might want to calculate a *Subtotal* - the result of multiplying *Price* by *Quantity* . Our goal is to take the *Grand Total* - *Subtotal* plus the *tax* if available. These two formulas are as follows:

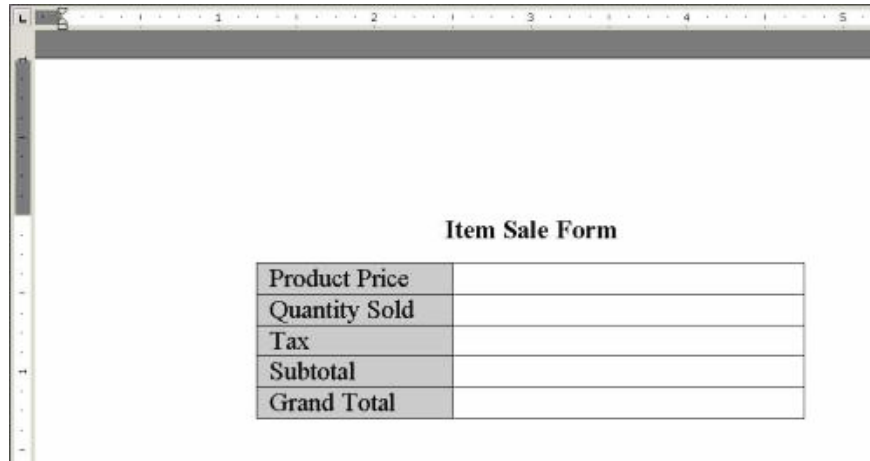
Subtotal: = Price * Quantity

Grand Total: = Subtotal * Tax + Subtotal

Step 3: Design Form

Once we have listed all static values and formulas, we can start designing the Form. Tables are not a prerequisite to adding calculating fields, but we use tables because they help manage data. For example, Figure 1

illustrates the table that will store and display the value for the Item Sales Form in rows.



Product Price	
Quantity Sold	
Tax	
Subtotal	
Grand Total	

Figure 1: Use tables to retrieve and manage values.

To create the table, go to **Table | Insert | Table** . In the **Insert Table** dialog box, specify the column number of **2** and the line number of **5** and click **OK** . Then enter the appropriate title in the left column.

Step 4: Display the Form toolbar.

Once the table has been created, it's time to enter the form fields so that data can be imported from a specific location. In this example, we need to use some fields to store three static values ??and two formulas. Form fields provide a data type and use formulas related to these values, such as using a variable.

Form fields do not appear in the standard menu or toolbar. We need to use the **Forms** toolbar (Figure B), call this toolbar by right-clicking any menu or toolbar and selecting **Forms** . Use the **Text From Field** button on this toolbar to insert form fields into the table.

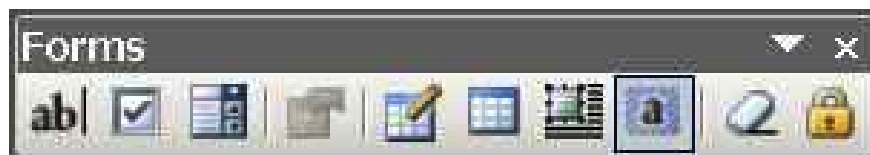


Figure 2: Forms toolbar call.

Step 5: Insert a text form field

A text form field will store several data types, including: *Text* (*Numbers*), *Numbers* (Digital data), *Symbols* and *Dates* (dates). There is a bit of difference when storing data in numbers and dates as text, but we do not need to pay attention to this. This form field type is not restricted to storing data only in text form.

To insert a form field to store product values, we will need to use a Number data type, insert as follows:

1. Press *Alt + F9* to display the field code. Form fields are easy to handle if you can see actual field code while designing the Form.
2. Position the cursor in the first cell of column 2.
3. Click the **Text Form Field** button on the **Forms** toolbar.
4. Right-click the form field and insert **Properties** from the context menu.
5. Select **Number** from the **Type field** drop-down list.
6. In the **Format Number** list, select the currency setting as **\$ #, ## 0.00; (\$ #, ## 0.00)**.
7. In the **Bookmark** field, enter *Price* as shown in Figure 3 (we will reference these Bookmark in the input formulas in the next steps).
8. Click **OK**.

The image shows a dialog box titled "Text Form Field Options". It has several sections:

- Text form field**:
 - Type: Number (dropdown)
 - Default number: (empty text box)
 - Maximum length: Unlimited (dropdown)
 - Number format: \$ #, ## 0.00; (\$ #, ## 0.00) (dropdown)
- Run macro on**:
 - Entry: (empty dropdown)
 - Exit: (empty dropdown)
- Field settings**:
 - Bookmark: Price (text box)
 - Fill-in enabled
 - Calculate on exit

Buttons at the bottom: Add Help Text..., OK, Cancel.

Figure 3: Enter Price into the Bookmark field.

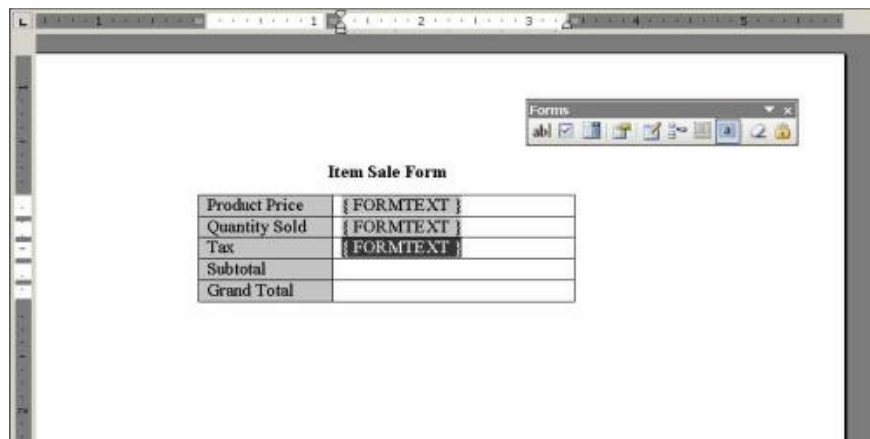
Step 6: Insert text form fields to spend the remaining static values

We still have two other static values: *Quantity* and *Tax* . Based on table 1 and redo the process in step 5, enter two more text form fields.

Table 1

Type Format **Bookmark** **Calculate On Exit** Number 0 **Quantity** Check Number 0% **Tax** Check

You need to select the Calculate On Exit setting for both of these static form fields. Then Word will be forced to calculate the formulas in the Form (though not yet entered) when we press the **Tab** key to move this form field. The form has three form fields shown in Figure 4.



Product Price	{ FORMTEXT }
Quantity Sold	{ FORMTEXT }
Tax	{ FORMTEXT }
Subtotal	
Grand Total	

Figure 4: Three form fields of the Form calculator.

Step 7: Insert a calculation form field for Subtotals

These three form fields will store static values, including: Product price, Sales quantity and Tax (if applicable). Here we will add a calculation form field that calculates the total cost. Add the subtotal form field as follows:

1. Place the cursor on the 4th row in column 2.
2. Click the **Text Form Field** button on the **Forms** toolbar.
3. Right-click the new form field and select **Properties** .
4. In the **Type field** drop down list, select **Calculation** .
5. In the **Expression** field, enter *Price * Quantity* (Do not delete the symbol = that Word provides).
6. From the **Format Number** list, select the currency option **\$ #, ## 0.00; (\$ #, ## 0.00)** .
7. Enter Subtotal in the **Bookmark** field and click **OK** .

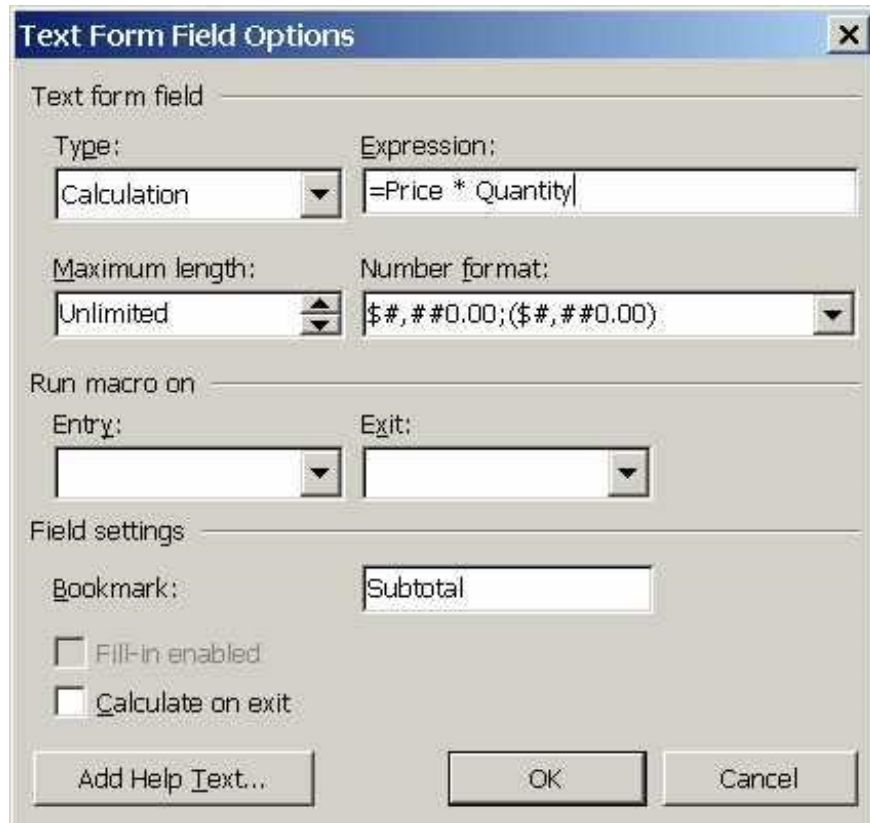


Figure 5: Expression field stores simple formulas.

Figure 6 shows the first calculation field of the Form. This code includes the formula, involving two of the static values, which are remembered as *Price* and *Quantity*.

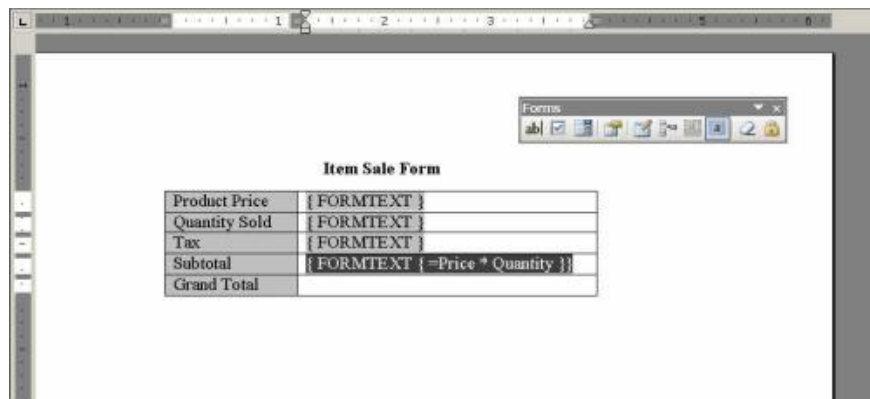


Figure 6: A calculated form field that includes the formula for this field.

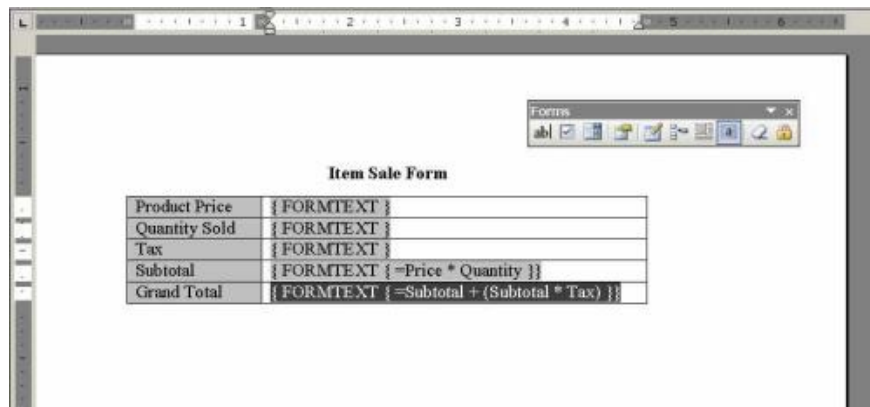
Step 8: Insert a calculation form field for the actual total.

Now we are ready to create a form field that calculates the actual total. This form field will be a little more complicated because of the extra tax calculation and adding it to the subtotal. To create this field, perform the

following actions:

1. Place the cursor on the last row of the second column.
2. Click the **Text Form Field** button on the **Forms** toolbar.
3. Right-click this form field and select **Properties** .
4. From the **Type field** drop down list, select **Calculation** .
5. In the **Expression** field, enter the $Subtotal + (Subtotal * Tax)$.
6. In the **Format Number** list, select the currency format as **\$ #, ## 0.00; (\$ #, ## 0.00)** .
7. Enter *GrandTotal* in the **Bookmark** field and click **OK** .

We have now completed inserting 5 form fields.



Item Sale Form	
Product Price	{ FORMTEXT }
Quantity Sold	{ FORMTEXT }
Tax	{ FORMTEXT }
Subtotal	{ FORMTEXT {=Price * Quantity} }
Grand Total	{ FORMTEXT {=Subtotal + (Subtotal * Tax)} }

Figure 7: Form with 5 form fields (Three fields store static values ??and two fields store the static value calculation formula).

Step 9: Protect documents

Before using this document, we need to protect it so that users cannot change the created form fields. Click **Protect Form** on the **Forms** toolbar (keychains icon).

Step 10: Use the Form

When the Form is protected, we can use it. Just enter the value and the calculation form fields will be updated. Perform the following actions:

1. Place the cursor in the first form field (*Price*) and then enter a value, for example enter 3.
2. Enter a value in the *Quantity* field. Example enter 2.

3. In the *Tax* field, Word calculates the two form fields as shown in Figure 8. At that time, there will be no tax listed.

4. Enter a tax value in the *Tax* field. For example enter *.06* and press **Tab** . Then *Grand Total* will include the tax value.

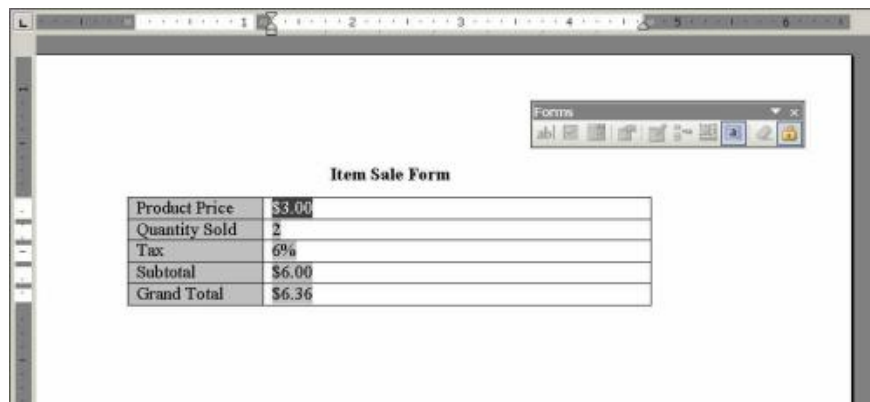


The screenshot shows a Microsoft Word window with a form titled "Item Sale Form". The form contains a table with the following data:

Product Price	\$3.00
Quantity Sold	2
Tax	
Subtotal	\$6.00
Grand Total	\$6.00

A "Forms" task pane is visible in the top right corner of the window.

Figure 8: Form performs the calculation of two form fields.



The screenshot shows the same Microsoft Word window with the "Item Sale Form" updated. The "Tax" field now contains "6%", and the "Grand Total" has been recalculated to "\$6.36".

Product Price	\$3.00
Quantity Sold	2
Tax	6%
Subtotal	\$6.00
Grand Total	\$6.36

The "Forms" task pane remains visible in the top right corner.

Figure 9: Two calculation formulas have all the data they need to return different totals.

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