Easily create an editable spreadsheet pre-filled with data from the datasource of your choice.

Set up formulas in your Spreadsheet documents to complete instant calculations.

When setting up Bots, use data entered by your users to pre-fill other documents in your Flow, or update data in your system of record.

Requirements:

An airSlate account and a working knowledge of airSlate.

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# Table of Contents

How to create a document from a Spreadsheet template .................................................. 3  
How to create named ranges in a Spreadsheet template .................................................... 6  
Formulas in a Spreadsheet template .................................................................................. 9  
Set up Bots for a Spreadsheet template ............................................................................ 10
How to create a document from a Spreadsheet templates

Follow the short step-by-step instructions below to get started:

1. Open your airSlate application and select Create New Flow.

You can also select the green Create new Flow button on the right.

2. The Create a Flow Template page will open.

In the Create section, select Spreadsheet from the list.
Upload a spreadsheet or create a new one using the online editor.

Select **Edit template** to add content, formulas, and named ranges to an uploaded Spreadsheet document template.

A Spreadsheet template will then open in the online spreadsheet editor.
When finished, click Complete.

You also can download the original version of a Spreadsheet template (along with edits made in the online editor) or delete it from the Flow.

To do so, click the three dots and select the option you need.

NOTE: Once a revision of a Spreadsheet document has been created, you won't be able to delete or edit your Spreadsheet template until you've deleted all Slates from the Flow.

Assign access permissions for your document if needed (see the Assigning Roles and Permissions to Fields and Documents user guide).

Proceed to the Bot and/or Distribute Flow settings, if necessary.

Select Go to List of Slates to finish the Flow and create your first Slate.
How to create named ranges in a Spreadsheet templates

Easily configure named ranges for cells in your Spreadsheet template using the online editor. Create named ranges for single fields as well as for tables.

Enter cell named ranges that fit your purposes. Use them when setting up Bots for pre-filling data from the datasource of your choice as well as for creating and updating new records using data entered by users.

Let’s review how this is done:

1. To create a named range, right click the selected cell(s) in your Spreadsheet template.

Then, in the Options menu, select Define Name.

NOTE: To create a named range for a table, click the cell and select the needed number of cells for the table by dragging the cursor to the right. The number of cells should correspond to the number of fields in the table.
2. Enter a name for your cell. Then, select **OK** to save changes.

This name will correspond to the field name that will be used by Bots.

3. Proceed to the cell type dropdown. Select the cell type from the list that will correspond to the named range field type.

Be sure to define the needed field type for each cell in the table.

**NOTE:** The cell type is set to **General** by default and equals the **Number** cell type. Use the **Text** type to pre-fill text values from a data source.
4. To view a list of created named ranges, click the arrow next to **Named ranges**. Then select **Name manager**.

The **Name manager** window will then open. Here you can edit, delete or create new named ranges.
Formulas in a Spreadsheet template

Set up formulas in your Spreadsheet templates to make calculations in seconds. Set names for the named ranges that contain the results of your calculations. They will be automatically available for use when setting up Bots.

Let’s see how formulas work when we need to calculate the total amount of expenses for a certain period:

1. Select the cell where you’d like the result of the calculations to be placed.

   Enter the symbol, then enter the function (SUM in the example).

   Select cells containing expenses by dragging them to the bottom.

   The Formula will be automatically generated for the selected cell.

   Hit Enter on your keyboard to calculate the result.

Create a named range for the cell and define its field type so that you can use it when setting up Bots.

(See the How to create named ranges in a Spreadsheet template section of this user guide).
Set up Bots for a Spreadsheet template

Set up airSlate Bots for your Spreadsheet templates to pre-fill them with data from a datasource of your choice as well as update data in your system of record.

Let's review how this is done in the example below where we need to pre-fill a table with data from Salesforce records to calculate the total amount. We'll then update the calculated value in the Salesforce record:

1. Open your Spreadsheet template in the online editor.

Enter a header for your table. This will help you to understand which data type the pre-filled values correspond to (Name, Date and Amount in the example).

Select the cells which will correspond to the number of columns in your table by dragging the cursor to the right. Then, create a named range for these cells (Table in the example).

Define the corresponding field type for each cell in the table:

- Name → Text
- Date → Date
- Amount → General / Number

2. In this example, we need to calculate the total amount of values that will be pre-filled into the Amount column. The calculated value will then be used for updating the value in your Salesforce record.

To do so, go to the fourth row and under the Amount column, select a cell.

Remember to create a named range for this cell (TotalAmount in the example).

Enter a formula that will calculate the total amount once the values will be pre-filled:

=SUM(C2:C3)

Click Enter to save your settings. Then, click Complete to finish editing the template.
3. Proceed to the Bot Settings.

Install the Pre-fill Bot (the Pre-fill from Salesforce Records with SOQL Bot in the example).

The Bot settings panel will open.

Enter your SOQL query to find the records that will be used to pre-fill data from.

Map Salesforce object fields to Spreadsheet document fields.

Finish setting up the Bot according to your needs, then click Apply settings.

4. To update the total amount that will be calculated once the document is pre-filled, install and configure the Update Salesforce Record Bot.

In the Bot settings panel, select the Salesforce object (Opportunity in the example).

Then map the Spreadsheet document field(s) to the Salesforce object field that should be updated.

Finish setting up the Bot, then click Apply settings.
Once a Slate revision has been created, the Spreadsheet document will be pre-filled with data from Salesforce records.

The total amount will be automatically calculated and updated in the Salesforce record.