With an intuitive one-size-fits-all Web Form builder, you can create any Form or Survey in seconds. Easily set up effective surveys and collect necessary data from your customers and employees using dynamic airSlate web forms. Boost business productivity by keeping in touch with your clients.

Requirements:
An airSlate account and working knowledge of airSlate.
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How to create web forms?

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

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

2. The Create a Flow template page will open. In the Create section, select Form or Survey from the list.
3. You can create a new form:

- using the web form editor (select **Blank form**)
- using an existing Google form link (select **Import from link**)
- selecting one from the library

Selecting **Import from link** allows for importing an existing Google form into your Flow as-is.

If you make any changes in your Google form after importing it to a Flow, those changes won't be displayed.

Once clicked, the **Import from link** window will open.

Enter your Google form link, then select **Import form**.
Note: Remember to make your forms publicly accessible so that users will be able to fill them. Also, uncheck the **Restrict to users in airSlate and its trusted organizations** checkbox in Google form settings.

- Filter forms by category when creating a new form using form templates.

Use the search line to locate the form templates you need.
4. Once you've created a blank form or selected a form template, the Form Builder will open.

Enter a title and description for your Form. Both can be used for Bot configuration.

Note: The title and description fields have default names such as header.title and header.description, and can't be changed.

Add fields to your Form and set up their properties according to your preferences.

Set conditions for specific fields to appear in a Form, depending on the data that is entered.

Use the Undo or Redo button to cancel or revert your changes.

View how your Form will appear to your customers with elements added by clicking Show Preview.
You can also test your Form while it's in the Preview mode. Clicking the **Filling list** in the upper right corner will open the list of optional and required fields that need to be completed by users.

The navigation wizard can also take users through the form to complete fields (via the green arrow).
How to set up elements/widgets?

Add elements/widgets to your Forms or Surveys by dragging & dropping or clicking an element/widget in the list.

Set up and edit properties of added elements/widgets by clicking them.

This will open the Properties settings on the right for the selected element/widget.

Here you can adjust the following properties:

Assign a field to a specific recipient if needed. Enter the field name that will be used when configuring Bots and setting up roles.
Enter a line title for your element/widget (it can be entered directly in the Form as well).

The line placeholder is set by default and can be edited according to your needs.
You can also:

- hide elements/widgets or make them visible
- enable or disable fillable fields access
- make them required
Note: while most of the element/widget properties are similar, some of them may still differ (depending on the element/widget type).

You can also adjust the size of an element/widget by dragging its right part.
Form elements and their properties

Below is a list of available elements as well as instructions on how to set them up:

**Heading**

This element is automatically added when creating a form and can be deleted if needed.

You can add multiple Heading elements if your form contains several logical parts which should be divided by headings.

The element includes such fields as **Title** and **Description** that can then be used for Bot configuration. You can also adjust the heading size as well as text alignment for the element.

![Heading example]

**Single-line text**

Use the single-line field to collect any text data such as phone numbers, zip codes, social security numbers, etc.

You can also set a specific format for this field.
This will allow users to only enter information in the specified format.

You can also set the limit of characters that users are allowed to enter in this field type. You can only specify the minimum or maximum amount, or both.
Once set, the field will appear as follows.

![Multi-line text field example]

**Multi-line text**

Use the multi-line field to collect detailed answers from your users. The number of lines in this field is adjustable and can be specified in the Properties panel.

![Height in rows configuration]

The multi-line text field isn’t extensible by default. Switch the toggle to make it extensible. This will allow for a field to be automatically expanded when filling it out.

The same can also be applied to the multi-line text field inside the Table field.

![Extensible toggle]

You can also set the limit of characters that users are allowed to enter in this field type. You can only specify the minimum or maximum amount, or both.
Once set, the field will appear as follows.

**Description**

Use this element for adding any text that needs to be formatted. You can enter up to 60,000 characters. The Description element is extendable and will automatically expand when it is filled out. The element can also be used when setting up Conditions.

Click the element to enter text and start editing it. Alternatively, click the pen icon above the element.
Once clicked, the editor will appear. Enter and format the text your users will see in the form.

The formatted text will appear to your users as follows:

Workplace Safety Survey
Please take the time to evaluate your safety by filling in the information below.

Workplace safety should be a top priority for all employees.

Please enter your name
Enter your answer here
Checkbox, Radio button and Dropdown

Use these elements so that your customers can provide their answers by selecting values from a picklist.

Set properties and apply them to the entire element you use, or set properties for individual options.

You can add / delete each option as well as edit its properties separately via the Property panel.

To add multiple options at once (for example, a predefined list of options), select Add multiple in the element property panel.

Remember to click **Apply changes** when you’ve finished editing.
Note: Any previous option settings will be returned to their default state once you submit new options via the Add multiple text area.

To allow customers to add their own option that is not provided in the form, enable the Other option.

The size of your elements is set to Full page by default. When editing element properties, you can also set the size to Half page.

Specify the number of columns in your element.

The column number is set to one by default.
By selecting two, the element will appear as follows.

You can also apply some additional (optional) settings to the Dropdown and Radio Button elements.

In addition to the default option values copied from the option titles, you can set custom option values that will be used by airSlate Bots for pre-filling or exporting.

Let’s consider the following example where we need to define the discount (an option value that will be exported by Bots) on the basis of a time period (an option title visible to users) where clients use company services:

1. Click the necessary option to open its Properties panel.

The option value is set to Same as title by default. To change the option value, switch to Custom.
2. Once switched, enter a value for the selected option that will be used by the Bots. Repeat these actions for each option in the element if needed.

Once users complete your Form, the discount value will be exported by airSlate Bots.

**Date**

Use this field to enter dates in various formats. Date formats can contain days, months, years, hours, minutes, and seconds.
The date format is set to **MM/DD/YYYY** by default. Proceed to the **Date Properties** to change the format.

You can set the following default date value:

- **Custom date** (is set by default) - allows for selecting the default date value from the calendar.
- **User's system date** - allows for setting the date value from a user's device. The date will be set when a user opens a form for filling.

It's possible to set specific range limits for the date field by specifying the start & end dates.
You can select **User's system date** or **Custom date** for the limits.

Once set, the date field with specified limits will appear as follows:

You can set days of the week that are only available for users to select in the calendar.

All days of the week are checked by default. To leave specific days in the list, uncheck any unnecessary days. Then select **Apply changes**.
Note: Don't select the User's system date option along with specific days of the week, as days of the week may not match in the user's system at the moment of filling a form.

To enter a date, click on the date field and select any date you need.

If the date format is set to MM/DD/YYYY hh:mm:ss AM/PM, then you'll be able to select the time (hours, minutes and seconds) in addition to the date.
Signature

Use the Signature field to enter your default signature value or leave it blank for your users to complete. You can also use this field for setting up roles (steps), conditions, and Bot configuration.

You can use this field for setting up roles and conditions as well as for Bot configuration.

Click on the signature box to select your signature or add a new one.
Click the three dots next to a signature to set it as default, edit, or delete it.

Once a form has been signed, you'll see the signature verification displaying the signature ID.
Initials

Use this element to certify documents using your initials. You can also use this field for setting up roles (steps), conditions, and Bot configuration.

Click on the initials box to add your initials. In the **Create initials** pop-up, type your initials. Alternatively, you can draw your initials, upload them from your device, or capture them using a webcam.

Selecting **Change style** next to the initials preview box allows for selecting another initials style.
Once done, select **Save and initial**.

To edit your initials, make them default, or delete them, click the three dots next to the initials you want to modify. Then, select the desired action from the list.

---

**Number**

Use this element for collecting numerical values such as numbers and decimals only.
The Number field can be used when setting up a Formula element.

To collect data such as zip codes, social security numbers, credit card numbers, etc., use the single-line / multi-line text fields.

Decimal properties are enabled for Number and Currency elements by default.

To disable decimal values, switch the toggle to **Off** in the Properties tab.

This will appear as follows:
You can also set the limit of values entered. It's possible to specify a minimum / maximum limit separately, or for both.

Doing so will restrict a user from completing a form if the values entered don't correspond to the limit(s) you've set.
You can also set the limit of characters that users are allowed to enter in this field type. You can only specify the minimum or maximum amount, or both.

Once set, the field will appear as follows.

Note: The Number field can be used when setting up Bots and can only be pre-filled with valid numerical values. Otherwise, Bots will fail.

Currency

Use this element for entering numeric values such as currency amounts.

The Currency field can be used when setting up a Formula element.
The currency type is set to **$ US Dollar** by default.

You can change the currency type in the **Properties** panel.

**Decimal values, Character and value limits**, and other settings for the Currency element are the same as for the Number element.

**Note:** The Currency field can be used when setting up Bots and can only be pre-filled with valid numerical values. Otherwise, Bots will fail.
Phone

This field is for collecting phone numbers from your users and shouldn't be confused with the Number field.

In the Properties panel, set the phone format to National or Custom:

- Selecting National will allow for choosing a default country in the list.
Use this format for the Phone field to be filled by your users.

- Selecting the **Custom** format will allow for entering phone numbers of any type.

Use this format when setting up Conditions and Bots (for pre-filling).

### Formula

This element allows you to make calculations on a form automatically. The result depends on the values entered by users in the Number, Currency, and/or Date fields.

In the **Calculations** section, select the type of fields (**Number or Date & Time**) that will be used for calculations:

- **Number** - allows for using the Number, Currency, and Formula fields to make calculations.

Select the formula style such as **Default, Currency, Percent, or None**.
Click the **Formula** box and select the **Data variable**. Then, select the fields you want to use as variables for your formula.

Enter a formula by using the symbols `+ - * /` and brackets.

**Note:** If your Form doesn't contain any **Number**, **Currency**, or **Formula** fields, you will be unable to set Formula elements.

Once you've selected fields and added symbols, click **Apply changes**.
The selected fields will correspond to the fields in the Form and their values will be calculated according to the formula entered.

You can also adjust the number of decimal places that will be displayed in a formula by clicking the corresponding buttons. If you set no decimals, the result will be rounded to the nearest whole number.

Let's take a look at an example where we need to calculate an employee's annual salary depending on the number of months they worked:
Formula results will be shown in the preview.

- **Date & Time** - allows for selecting Date fields to calculate the time.

Select the formula style such as **Default, Period, Time**, or **None**.

Select the Date fields for the start and end date that will be used for calculations.
Choose whether the calculation result will be displayed in days, months, or years.

Let's consider an example where we need to calculate the amount of days for the period from Oct 16, 2021 to Dec 3, 2021:
Formula results will be shown in the preview.

Note: If a Form contains two or more Formula fields, you can use another Formula field as variables for your formula.

The result of the selected Formula field will be automatically used in your formula once calculated.
Matrix

Use this element to enable your customers or employees to give single choice answers for each row.

Adjust the Matrix by adding more rows and columns (6 columns maximum are allowed).

You can change the order of columns / rows using the drag and drop, either inside the Matrix Properties or on the canvas.

All of an element's properties, as well as its rows and columns, can be edited separately:

- Edit the columns:

You can add / delete and edit each column in the element separately via the Properties panel.
Column titles are used by airSlate Bots for pre-filling or exporting by default. However, it's also possible to export or pre-fill a different column value than what was entered.

To do so, click on the column you need. Then, in the Column Properties, switch the toggle to **Custom**. The value you enter will be used by Bots despite the column title on the canvas.

- **Edit the rows:**

You can add / delete and edit each row in the element separately via the Properties panel.
To add and edit multiple rows at once, select **Add multiple** in the element’s Property panel.

Remember to click **Apply changes** options when you’ve finished editing.

![Image showing the Matrix element with options to add or remove rows.](image)

**Note:** Any previous row settings will be returned to the default state once you submit new rows.

The entire Matrix element, or its separate rows, can be used when setting up Bots as well as assigning roles.

In the **Settings** section, you can select whether rows in the Matrix element will be required or optional.

![Image showing the Settings section with options for required vs. optional rows.](image)

**Table**

The Table element is set to 3 columns and 3 rows by default. It contains the following multi-type columns:
- Column 1: Text field
- Column 2: Dropdown field
- Column 3: Checkbox field

Adjust your table by adding more rows and columns (A maximum of 30 columns are allowed).

*Note:* If a table contains 5 or more columns, they'll appear as cards in downloaded or printed forms.

You can add columns and change their order using drag & drop, either in a canvas or via the Properties panel.

You can also change Column types according to your needs.
If field types such as **Number**, **Formula**, or **Currency** are selected for a Column type, you can enable the **Total by column** option.

This will allow for calculating the total amount for the entire column. This can then be used for setting up Bots and form conditions.
Enabling the **EDIT ROWS** option will allow recipients to add or remove rows in the table.

> **Note:** The entire Table element, or its separate Columns, can be used when setting up Bots as well as assigning roles.

## Group

This element allows you to build a block of different elements by organizing them in logical groupings.

Set up properties for an entire Group element or for its components separately.

Decide whether the Group element will appear to your customers as expanded or collapsed in your Form. To do so, use the **Collapse / Expand** buttons under the Group title.

You can also decide whether the element will be collapsible (set by default) or not for your users. To do so, adjust the slider in the **Properties** panel.
Repeatable container

This element allows users to duplicate fields that are placed inside a repeatable container. Drag and drop up to 100 fields you'd like to add to the repeatable container from the Element panel.

The following field types can be used:

- Single line text
- Multi line text
- Email
- Date
- Checkbox
- Radiobutton
- Dropdown
- Number
- Phone
- Currency
- Formula

Note: Settings made for the first field in a repeatable container will be applied to each duplicate field.
When completing your form, users will be able to duplicate the same block of fields as many times as they need (but up to 100) by clicking **Add more**.

You can also use the fields inside a repeatable container for setting up Bots and Conditions.
Divider

This element allows for adding horizontal dividers between elements in a form. You can put them between questions or use them to divide certain blocks of elements.
Form widgets and their properties

Below is a list of available widgets as well as instructions on how to set them up:

Switch to the **Widgets** tab to add them to your form.

![Widgets tab](image)

### Address

This **Address** widget allows users to enter their address by specifying a ZIP or postal code, country, city, street, etc.

You can also add any elements you need to the **Address** widget except for the Group, Matrix, and Table elements.

It's also possible to adjust the **Address** widget as well as its fields/elements separately in the Properties panel. To do so, click the widget or the element you need inside the widget.

The **Address** widget and its separate fields can be used when setting up form conditions. You can also use individual widget fields for setting up Pre-fill and Post-fill Bots.
Attachment Request

Use this widget to request some additional files (attachments) from your users. The Attachment Request widget can also be used when setting up roles, Bots, and form conditions.

Documents can be uploaded by the form creator in advance as the default values. Uploaded documents can then be changed by users.

It's possible to upload files by dragging & dropping them or by clicking Upload in the Attachment Request widget.
Alternatively, select **Upload** in the Attachment Properties panel (optional).

To download or delete each attachment separately, users should click the three dots, then select their action.

To download all attachments at once (as a .zip file), users should select **Download all files**.
To open attachments for viewing, users should select **View** next to the attachment they need.

---

**Contact details**

Adding this widget allows users to enter their name, email, phone number, and address. You can adjust the widget by adding more fields/elements or deleting unnecessary ones.

It’s possible to set up the entire **Contact details** widget as well as its fields/elements separately in the Properties panel. To do so, click the widget or the element you need inside the widget.

Use the **Contact details** widget and its separate fields when setting up form conditions. You can also use individual widget fields for setting up Pre-fill and Post-fill Bots.
Personal information

Use this widget to collect a user's personal information such as their name, gender, date of birth, citizenship, and marital status. Add more elements to the widget by dragging and dropping them as well as deleting unnecessary fields from the widget.

You can adjust the **Personal information** widget as well as its fields/elements separately in the Properties panel. To do so, click the widget or the element you need inside the widget.

Use the **Personal information** widget and its separate fields when setting up form conditions. You can also use individual widget fields for setting up Pre-fill and Post-fill Bots.

Image

Use this widget to add an image to your Form. The following formats are available: JPEG, JPG, and PNG. You can also use this widget when setting up form conditions.
Note: Images can only be added to a form by form creators.

To upload an image, select Choose Image in the Properties panel.

You can also adjust the scale, alignment, and size of your image.
Once uploaded, your image will appear as follows:

**YouTube / Vimeo**

Adding these widgets also allows for inserting a link to YouTube/Vimeo videos in your form. You can use these widgets when setting up form conditions.

Add a link to your video by inserting it into the **Video URL** box. Then, click **Apply changes**.
You can also adjust the size (full page or half page) of your video on the canvas.

Your video will appear as follows:

**HTML code**

Add HTML code, links, or text to your Forms that will then be visible to your users. This widget can also be used when setting up form conditions.
Enter HTML code in the Properties sidebar. Then, select Apply changes.

Adjust the size of this widget if needed. The HTML code you entered will appear as follows:
Web form style

Design your forms to make a strong first impression. Add an eye-catching logo, header, or background to brand your forms and make them more recognizable.

Proceed to the **Style** tab to open the panel with the **Logo**, **Header**, and **Background** settings.

### Logo

To upload your logo image, select **Choose image**.
YOUR LOGO

Logo image

We recommend using an image up to 256x256 px with a resolution of 300dpi. Maximum size is 2MB. Make sure to use .jpeg, .jpg, or .png formats.

Choose Image
Once uploaded, you can set:

- logo image scale (will be defined automatically after uploading an image and can be changed according to your needs)
- logo image alignment (left is set by default)

Choose how the logo will be placed in a form.

A form with an added logo will appear as follows:
Clicking the logo will open the **Logo** settings so you can easily edit it.

**Header**

You can design your header by selecting a color or image for it:

- In the **Color** tab, you can select the header color you’d like.

![Header settings](image)

The header will appear as follows:

![Header example](image)

In the **Image** tab, you can choose an image for your header.
Once uploaded, you can adjust the size and alignment of your header image.

Once completed, the header will appear as follows:
Background

You can select the color of your Web Form background in the **Background** settings.

The Web Form will then appear as follows:
Conditions for Form fields

Create a simple logic for customers to follow when completing your forms. Specify conditions for certain fields / elements to be shown, hidden, enabled or disabled in your Forms on the basis of customer answers. Set up simple or advanced conditions depending on your needs, referring to the instructions below.

Let's see how this works using an example case:

You need to ask customers whether they'd like to receive your discount notifications and personal offers when they've entered their emails and / or phone numbers.

Proceed to Conditions, then select Add new condition.

The constructor for a new condition will then open.
Set up a new condition

Select an action that will be applied to specific fields once certain conditions are met.

You can select several fields for the same action. This will allow you to streamline the process of setting up conditions.

Once selected, click **Apply changes**.

Proceed with other settings. When finished, your settings will appear as follows:

Action: **Show** - Field: **Discount notifications, Personal offers** - IF: **email** - STATE: **is not empty**.

The condition will appear as follows:
According to your condition settings, customers will see the discount notification and personal offer questions after they've entered their email.
To add additional conditions that will depend on an existing condition, click the plus icon next to the last condition level.

🗒 **Note:** For multiple conditions, choose whether all of the conditions should be met *(And)* or just one of the conditions should be met *(Or)*.

**Set up an advanced condition**

1. **Action:** *Show* → **Field:** *Discount Notification, Personal offers* → **IF:** *email* → **STATE:** *is not empty*.

2. **OPERATOR:** *OR* → **IF:** *Phone number* → **STATE:** *is not empty*.

The condition will appear as follows:

According to your condition settings, customers will see the discount notification and personal offer question after they've entered their email or phone number.
Once your Form has been properly set, click **Complete**.

Proceed to the Bot settings and Sharing Flow options, if necessary.

Note: Be careful when setting up Pre-fill Bots for the **Email**, **Date**, **Currency** and **Number** fields. The data format in the fields of your selected datasource (spreadsheets or other document types inside airSlate) should correspond to the data format in your Form fields. Otherwise, Bots will fail.

These rules are relevant to Table columns with the same field types.

Select **Go to List of Slates** to finish the Flow and create your first Slate.
Pages in web forms

Allow users to easily fill your web forms by dividing a canvas into separate pages. You can add new pages to your form or divide an existing page into several pages by using a specific form element. Let’s see how to do this.

To add a new page onto a canvas, scroll down and select Add new page in the Web Form editor. You can add up to 1,000 pages.

A new page will be instantly added. To duplicate or delete it, select the corresponding icon above.
To combine pages, delete the divider between them by clicking the trash icon.
The pages will be instantly merged into one.
To divide a page into two separate pages, drag the **Page break** element onto the canvas and drop it where the page needs to be divided.

**Note:** You won't be able to divide the **Group** and **Repeatable container** elements as well as widgets with the **Page break**.
You can also set page properties for each page separately. To do so, click the page you need to set up. You can enter the page name, hide the page, or make it visible or duplicate it.

>Note: Pages can't be used for setting up Bots, but can be used for setting up Conditions (only for the Action: Show/Hide)
The form will appear as follows for users:
Workplace Safety Survey

Workplace safety should be a top priority for all employees. Please take the time to evaluate your safety by filling in the information below.

Please enter your full name
Enter your answer here

Please enter your email
john.doe@example.com

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Next

Switching between pages will be disabled until all pages are completed.
Once all pages are completed, users will be able to switch between pages. When the form is properly completed, users will see a confirmation in the bottom right corner.
Assigning web form fields to specific users

As a Flow creator, you can assign fields to be completed by specific users (steps). All fields assigned to separate users will be highlighted in the same color. The steps created for users inside the Web Form editor will be automatically displayed in the Flow diagram.

_note: When creating a web form, the fields you add will be assigned to the Recipient 1 by default and will be highlighted in blue. To add fields that aren’t assigned to any step, you need to first uncheck the Recipient 1 in the Select recipient dropdown._

Let’s consider an example where an employee sends a laptop request that needs to be reviewed and signed by a system administrator and a company director:
1. Proceed to the **Recipients** tab. The simplified version of the Flow Diagram will open. Click the plus icon to add a new step. Once added, select **Apply**.

2. Once steps have been created, navigate to the **Select recipients** dropdown. Switch to the step which you need to assign fields to. As each step has a specific color, the field icons will repeat the step color and will be highlighted in the same color on the canvas.

**Note:** If you need to assign fields to another step, be sure to deselect other steps in the list. Alternatively, the fields you add will be available for all selected steps in the list.
If you need to change steps for fields that have already been assigned, click the field. Then, in the Assign Field section, select who will be able to fill in the field.

To make additional settings for steps you've added, proceed to the Workflow tab in your Flow settings.

**Pre-filling web forms during a signing session**

If any Pre-fill Bots are configured for your web form's fields, your form can be automatically pre-filled with data from a specific datasource at the moment of filling. This allows users to avoid having to type in all data manually or switching between documents to get forms filled.

To begin, users should fill in the triggering field(s) that match the conditions of the Pre-fill Bot Lookup. Once filled, other mapped fields will be automatically pre-filled the moment users enter the correct data into the triggering fields.

Let's consider an example where we need to pre-fill a form using the Pre-fill from Google Sheet Bot:

1. Add the fields you’d like to be pre-filled in the form.
2. Install and configure the Pre-fill from Google Sheet Bot for your form. Let's select the Name field as a matching condition.
3. When a Slate is created, a user is expected to fill in the **Name** field in your form (**John Smith** in the current example):

![Client Survey Form]

Once matched, the Bot will automatically begin pre-filling other fields in the form.
Other fields (mapped in the Bot setup) will be automatically pre-filled with data from a specific Google Sheet.

Note: The data format for the fields of your selected datasource should correspond to the data format for your Form fields.

For example, Bots won’t prefill text into email fields or specific symbols into number fields, etc. Otherwise, the pre-filling of mapped form fields during a session will fail.