Pre-filling Questions in Your Routing Form

Pre-filling guest information on your Routing Form streamlines the process for both you and your visitors. By reducing manual data entry, it saves time, minimizes errors, and enhances the overall experience.

Before starting, make sure you've mapped your Routing Form Questions to the necessary Custom Fields. For guidance on mapping, please take a look at **this article**.

Enabling Personalization and Tracking

To create a pre-filled form link, follow these steps:

1. Click on **Routing Forms** in the lefthand navigation menu.
2. Click on **Share** next to the form you want to get a link for.
3. Check **Personalization and Tracking** in the popup.

Adding Tracking (Optional)

Under **UTM parameters** you can add your various UTMs that you use for tracking.

Configuring your pre-fill options

Under **Routing Form URL Parameters** you have 2 options for how you would like to pre-fill the form:

- **For a specific visitor:** Manually enter visitor information to populate the form when they use the shared link. Use this option if you already have their details available.
- **Via third-party tool:** Generate a link with placeholder text. Use this option if you want to populate visitor information using third-party tools such as CRMs.

Finalizing the Link:

- Once you have configured the parameters, click **Copy & Close** to generate and copy your pre-filled booking link.

Pre-filling the Routing Form for a Specific Visitor

This method allows you to input a visitor's information directly into the text fields representing your booking form's specific fields.

- Example: Enter details like **Name**, **Email Address**, or **Phone Number**.
- When the visitor uses the shared link, their pre-entered details will be auto-filled in the corresponding questions in the form.

Pre-filling the Routing Form Dynamically via Third party tools

For more dynamic needs, you can use the form links with third-party tools like CRMs or marketing platforms:

1. Enable toggles for the fields you'd like to populate dynamically (e.g., Name, Email, etc.).
2. A placeholder (e.g., Name=XXXX) will appear in the generated form URL.
3. Use automation in your third-party tool, such as a mail merge feature, to replace placeholders with actual visitor data.
4. Deploy the customized form link in your campaigns or workflows.
    - Once a guest clicks the link, their information will automatically populate the corresponding questions in the form.