

How do we create a form with AI

1. Overview

This feature allows administrators to create a form by describing the required fields in plain text and letting AI generate the form structure, which can then be reviewed, edited, and saved before assigning it to users.

2. When to Use

- When you know what information needs to be captured but don't want to build the form manually
- When you want a quick starting structure that can be edited later
- When creating draft forms before assigning them to users
- When experimenting with different form layouts before finalizing

3. Concepts

- **Forms** - The section where all draft and published forms are managed
- **Generate with AI** - An option to create a form using a text description
- **AI Prompt** - The text input where form requirements are described
- **Form Builder** - The screen where generated fields can be edited
- **Draft Form** - A saved form that is not yet assigned or published
- **Add Users** - The step where users are assigned to the form

4. Set Up Guide

1. Open the **Forms** section from the left menu.
https://converse.bsharpcorp.com/form_builder
2. Click **Create** in the top-right corner.
3. Select **Generate with AI**.

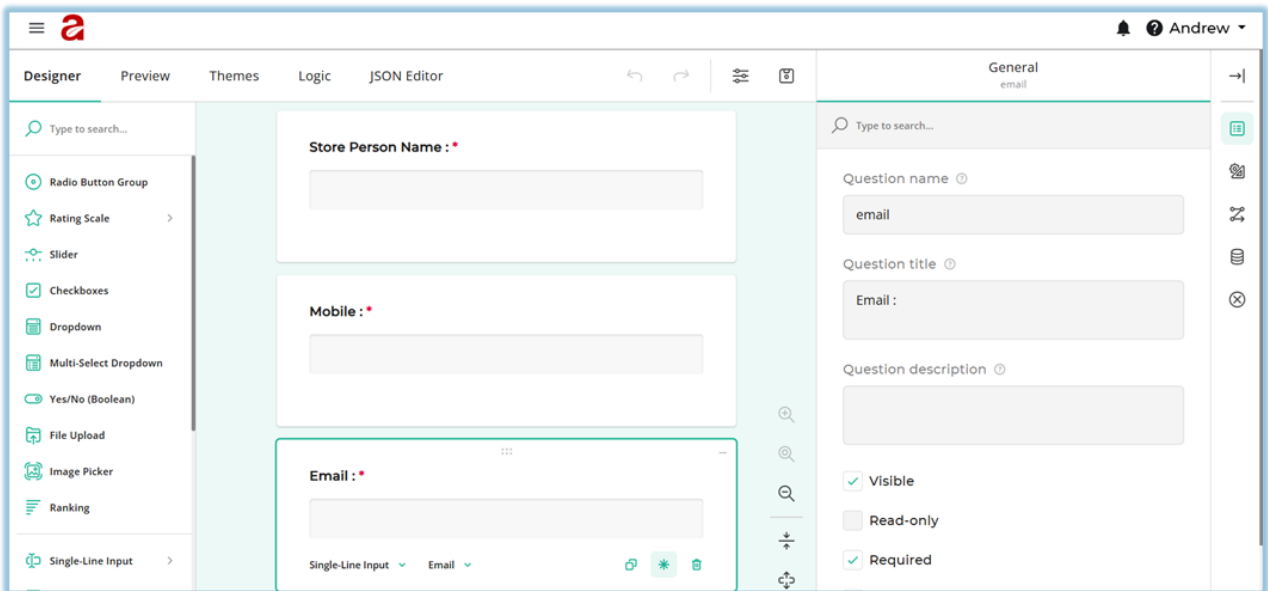
The screenshot shows the 'Form' management interface. The left sidebar contains navigation options: Home, Feed, Answers, Creator Mode, Mentor, Content, **Forms** (highlighted), Learnbee Library, Learning Pathway, Events, Reports, Settings Centre, Communication Centre, Account Settings, User Management, and Invite User. The main area displays a table of existing forms with columns: Form Name, Category, Created by, Published Date, and Status. A 'Create' button in the top right has a dropdown menu with options: From Scratch, Using Template, and **Generate with AI** (highlighted).

Form Name	Category	Created by	Published Date	Status
Background check consent form	Human Resources Form	Andrew Felix	09/Jan/2026	Published
Motorola Tablets Sales Form	Sales Form	Andrew Felix	23/Dec/2025	Published
Motorola Tablets Sales Form	Sales Form	Andrew Felix	23/Dec/2025	Published
Consumer Durables Display Readiness Survey	Other Industries Form	Andrew Felix	16/Oct/2025	Published
Consumer Durables Customer Feedback	Other Industries Form	Andrew Felix	16/Oct/2025	Published
Marketing and Brand Compliance Form	Marketing Form	Andrew Felix	16/Oct/2025	Published
Stock/Inventory Update	Sales Form	Andrew Felix	16/Oct/2025	Published
Bsharp Expense Form	Human Resources Form	Andrew Felix	09/Oct/2025	Published
Washing Machine Site Readiness Checklist	Other Industries Form	Andrew Felix	08/Oct/2025	Published

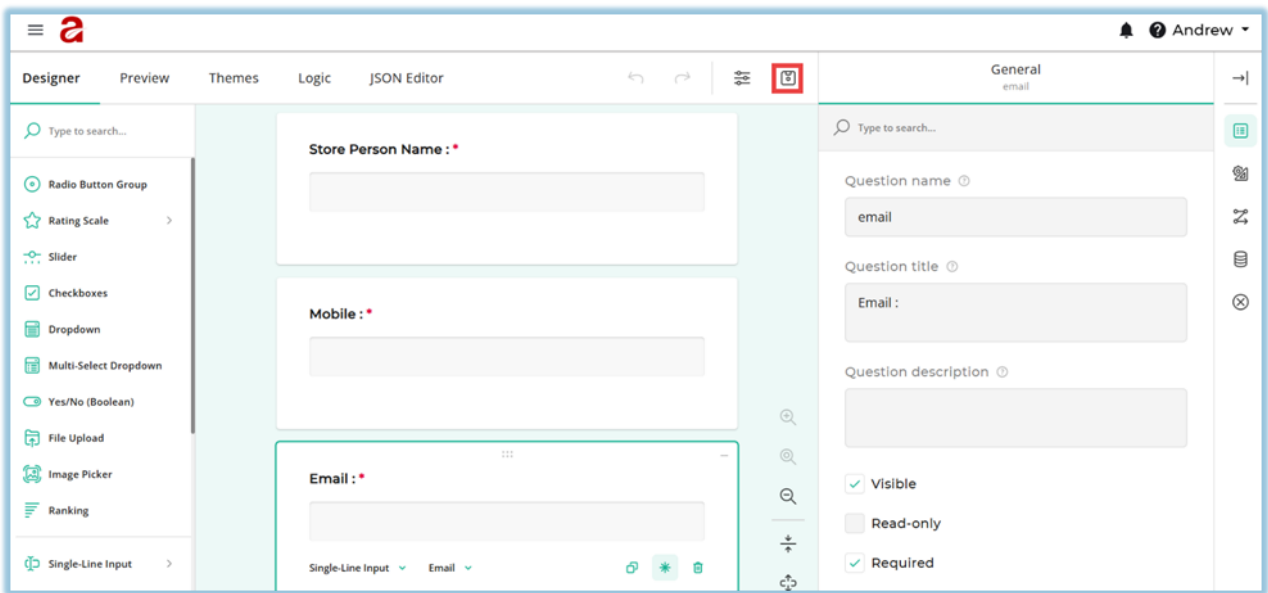
4. Enter the form requirements in the text box, listing the fields needed.
5. Click **Generate Form**.

The screenshot shows the 'Create with AI' interface. The main area displays a text box with the prompt: "I'm creating a form to capture store images along with the store person details." Below the text box, the generated form fields are listed: "Store Person Name", "Mobile", and "Email". A "Generate Form" button is visible at the bottom.

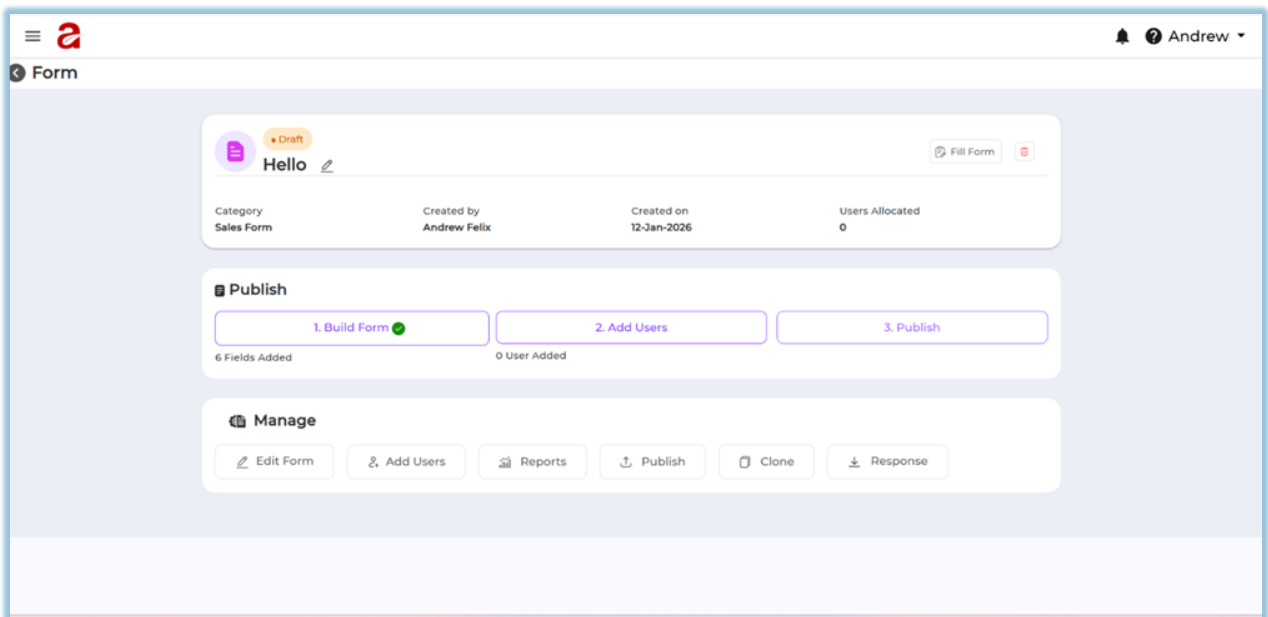
6. Review the generated form in the Designer view.
7. Edit fields if required.



8. Click **Save** after completing edits.



9. Return to the **Form details page**, where **Build Form** is completed and **Add Users** is available.



10. Select **Add Users** to assign users individually or by attributes.

Assign Users

Individual Users | By Attributes

Search users

User Name	Email Address	Country	Action
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11. Click **Save** to keep the form editable, or **Save & Publish** when ready.

5. User View

If the form is assigned to users, it appears on the **Home page** under the **Forms** section. Users can scroll down the Home page to view and access their assigned forms.

6. Reporting

- **Form Reports** show submission status and responses
- Reports can be accessed from the **Reports** option in the form's Manage section

Form

Published

Hello

Fill Form

Category Sales Form	Created by Andrew Felix	Created on 12-Jan-2026	Users Allocated 1
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Publish

1. Build Form 6 Fields Added

2. Add Users 1 User Added

3. Publish Published

Manage

Add Users **Reports** UnPublish Clone **Response**

7. Best Practices & Tips

- Be specific when describing fields in the AI prompt
- Always review AI-generated fields before saving
- Save the form as draft if changes are expected later
- Assign users only after validating the form structure

8. Troubleshooting / FAQs

Q: What happens when I click Save after editing the form?

The system redirects you to the **Form details page**, where you can proceed to **Add Users** or publish later.

Q: Can I edit the form after publishing?

No. Once published, the form cannot be edited.

Q: Can I save without publishing?

Yes. Saving keeps the form in draft mode and editable.

9. Version Notes

Last Updated: 12 Jan 2026

Revision #2

Created 12 January 2026 05:38:24 by Manjula Jagadish

Updated 12 January 2026 11:47:12 by Manjula Jagadish