iSmartWorks AI
User Guide
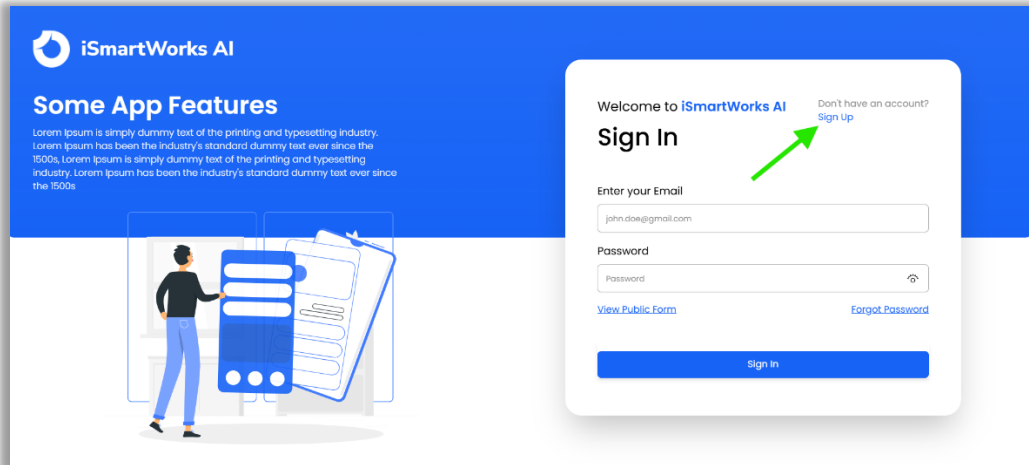
Big Instance Technologies

Table of Contents
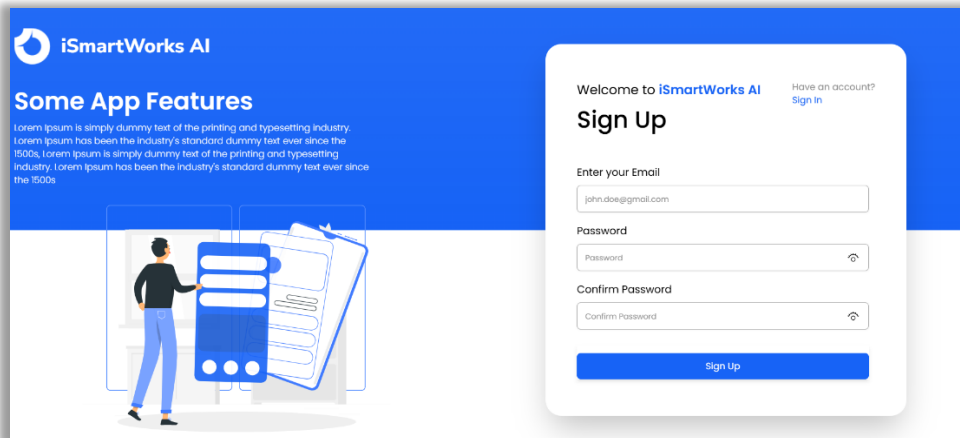
1. Signup & Account Creation

- Visit the URL: https://ismartworks.ai
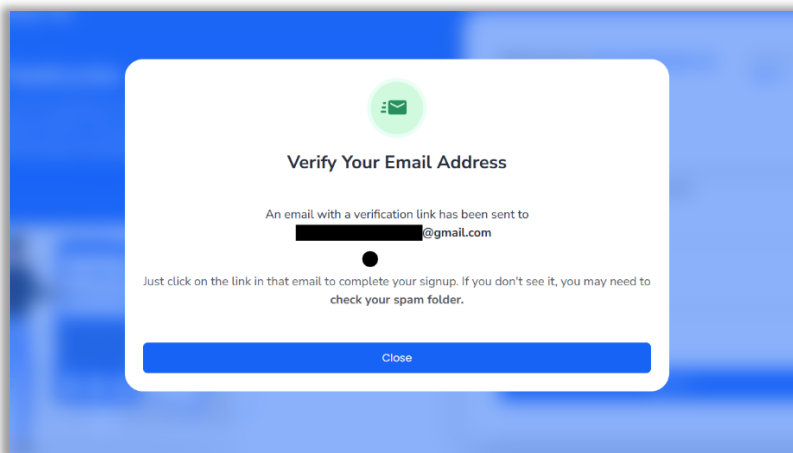
- Go to the website and click **"Sign Up"**.

- Fill in credentials (company email and password) to register your company.

- A **verification link** will be sent to your registered email. Click it to verify your email.

- Log in using the same credentials.

2. Initial Setup After Login

- After the first login, you will be redirected to fill out:

  - **Admin Details** (Name, Contact info, etc.)

  - **Company Details** (Company name, address, domain, etc.)

- Click the **"Save"** button to continue.

- You will be redirected to the **Pricing Plan** section:

  - Currently, no subscription fee is charged.

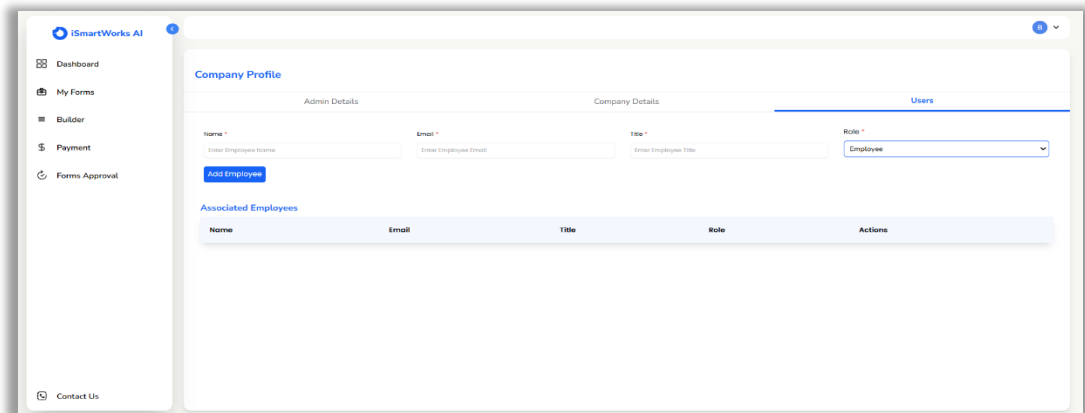 - Choose an appropriate plan to activate features.
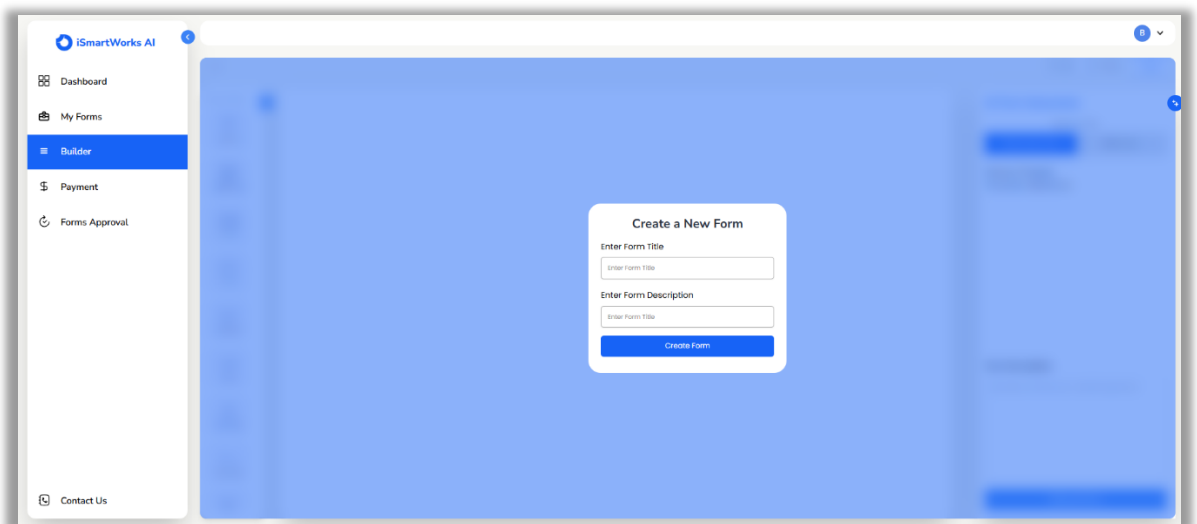
3. User & Employee Management

- After plan activation, go to the **"Profile"** section to add users/employees.

- Input employee details: Name, Email, Role, etc.

- Employees will receive login credentials on their email.

- Employees use the received email and password to log in and access forms.

4. Dashboard Overview

- Upon login, the **Dashboard** appears with a left-hand navigation panel.
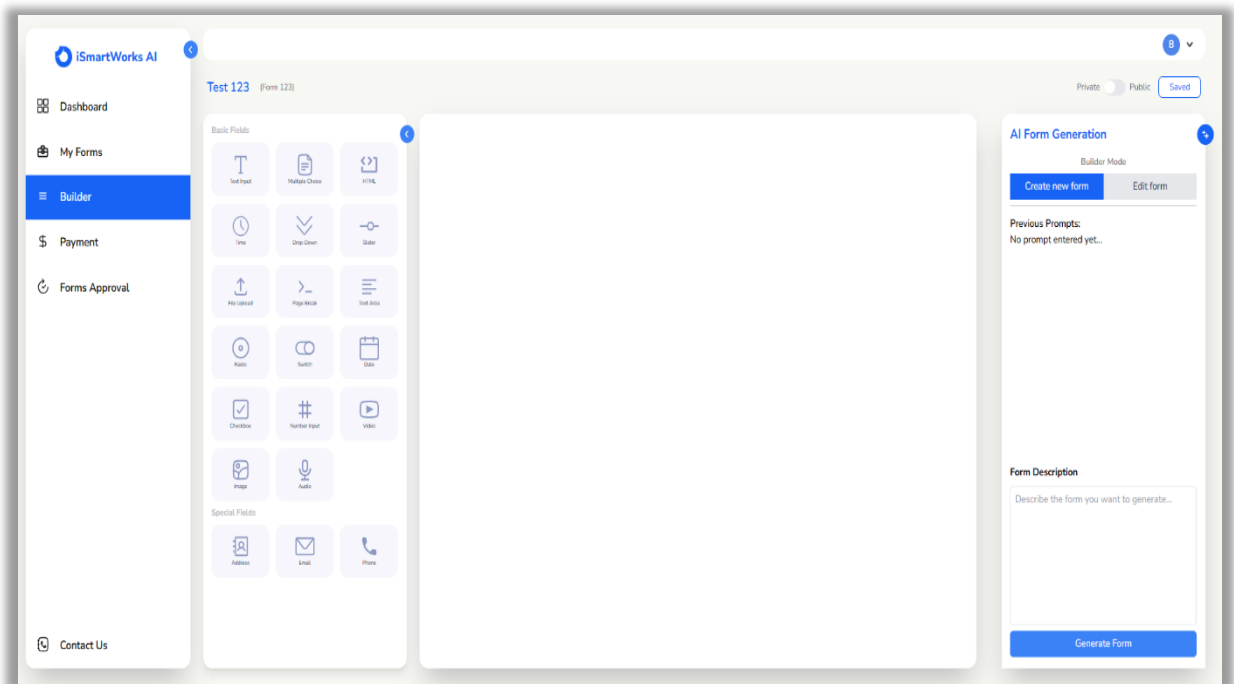
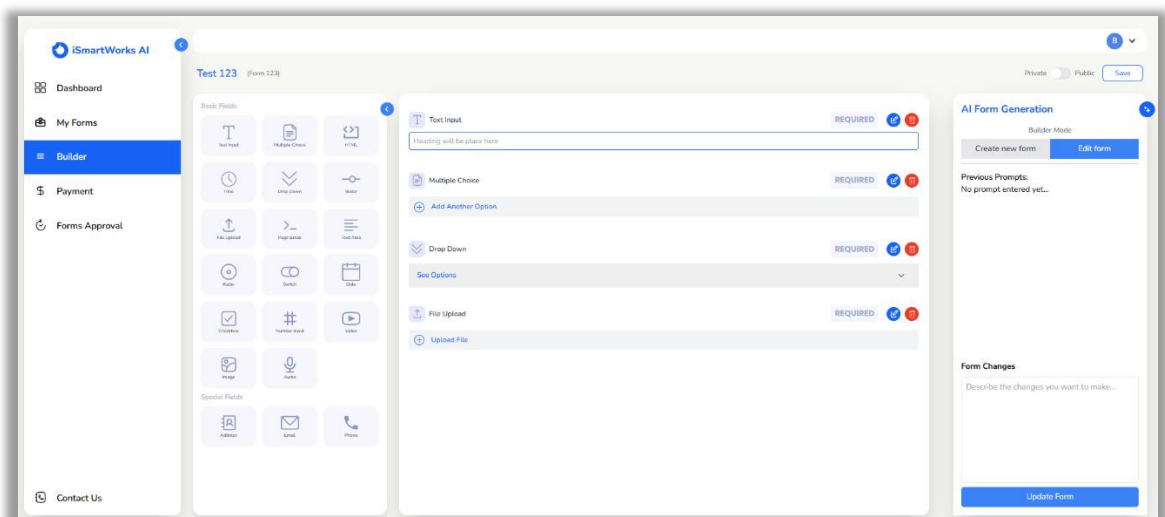- Click **"Builder"** to create new forms.

5. Form Creation Methods

a) Drag and Drop Form Builder

- Select fields from the **Field Selection Panel**.

- Drag fields like Textbox, Dropdown, Date, etc., into the centre canvas.

- Configure field properties (label, required, options, etc.).

- Click **"Save"** to store the form.

b) AI-Powered Form Generation

- Use the AI input panel to enter prompts like:

    o "Create a form with employee name, designation, and joining date"

- AI auto-generates fields as per your input.

- Use buttons:

    o **"Create New Form"**: start fresh

    o **"Edit Form"**: update existing drafts

- Fields can be modified manually after AI generation.

- Click **"Save"** when finalized.

6. Form Publishing & Approval

- Navigate to the **Form Approval Tab**. Managers can review and approve forms.

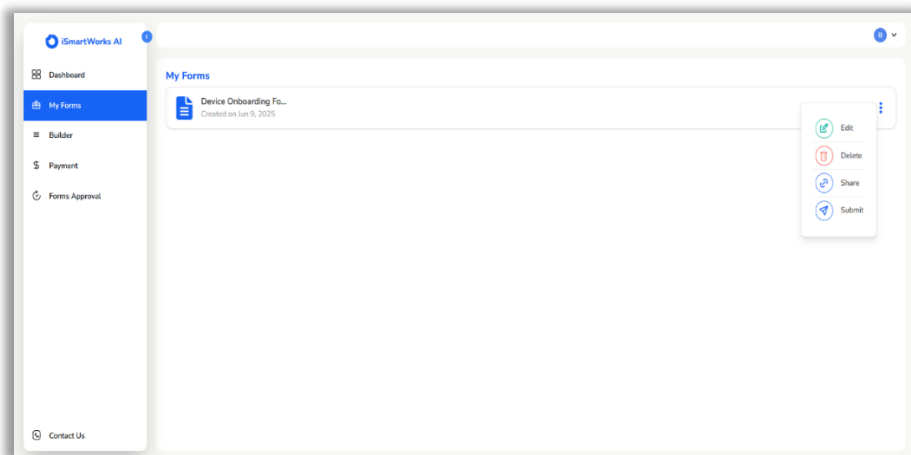- Approved forms become **available to employees** via:

  o **Dashboard (Web)**

  o **Mobile App (iOS/Android)**

7. Form Submissions

a) From Desktop

- Employees log in from the web dashboard.

- Access published forms and fill required fields.

- Submit form data with ease using the UI.

b) From Mobile App

- Download the IOS application:

https://apps.apple.com/ca/app/ismartworks/id6746844131

- Download the Android application:

https://play.google.com/store/apps/details?id=com.app.ismartworks&hl=en_CA

- Employees/managers log in via iOS/Android app.

- Access available forms from mobile.

- Submit forms on-the-go, which sync with the admin portal.

< **Device Onboarding Form**

Form

Device Name*

Test 2

Device Type*

Router ⌄

Model Number*

xxxxxxxxxx

Serial Number*

xxxxxxxxxx

Purchase Date*

My Forms

Form submitted successfully
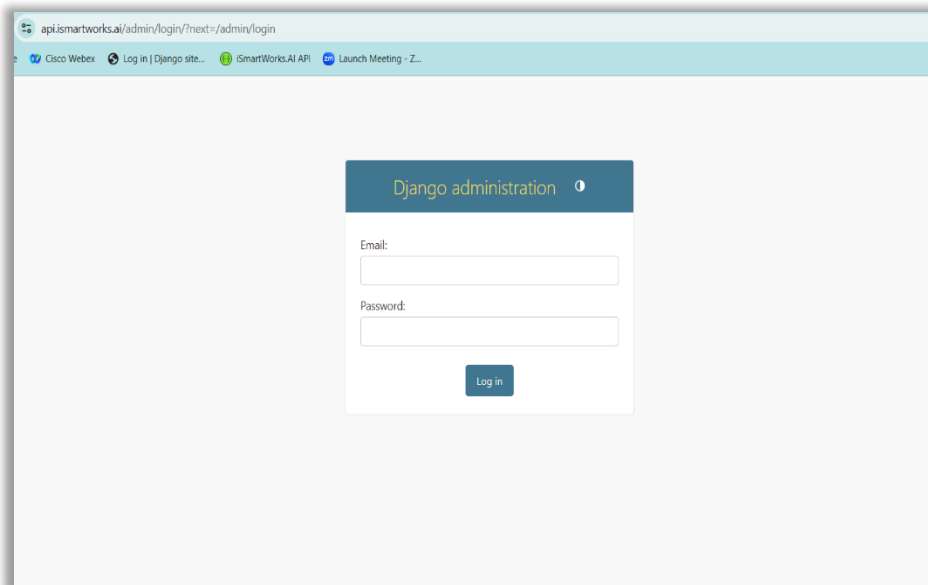
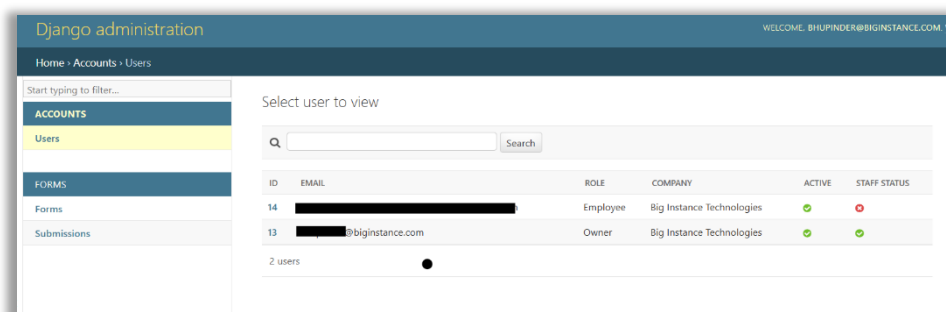My Forms   Profile   Notification

8. Admin Portal Access

Visit: https://api.ismartworks.ai/admin/login

- Only **Managers/Owners with staff account access** can use this portal.

- Admin Portal Features:

  - View **all users** registered under the company.
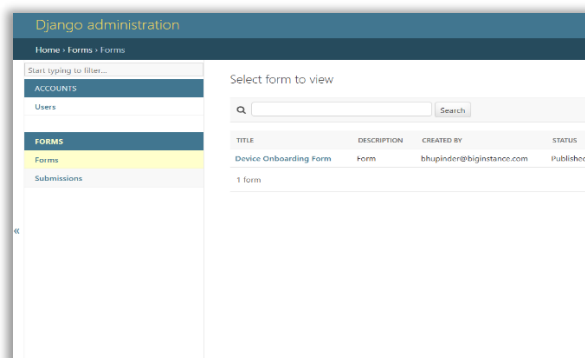
  - View and manage **all created forms**.

o Track **form submissions** (desktop + mobile).

9. Admin Panel Functionalities

- **Manage Users**: Edit, remove or update user information.

- **Form Access**:

  o View created forms.

  o Check form statuses (draft, published, etc.).

- **Submissions View**:

  o Track who submitted what, when, and from where.

  o View detailed field-level data of submitted forms.

  o Download or export form submissions for reporting (Under development)

10. Download the App

- Download the IOS application:

https://apps.apple.com/ca/app/ismartworks/id6746844131

- Download the Android application:

https://play.google.com/store/apps/details?id=com.app.ismartworks&hl=en_CA