

iSmartWorks AI

User Guide

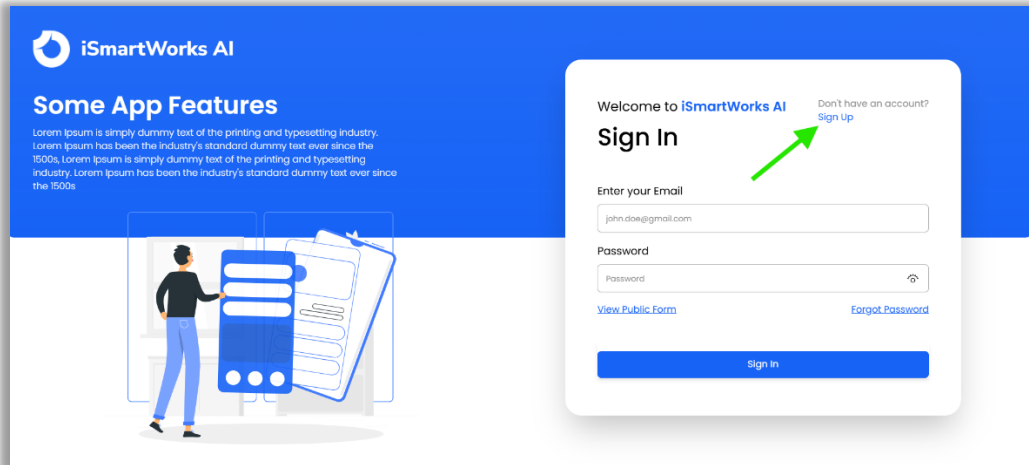
Big Instance Technologies

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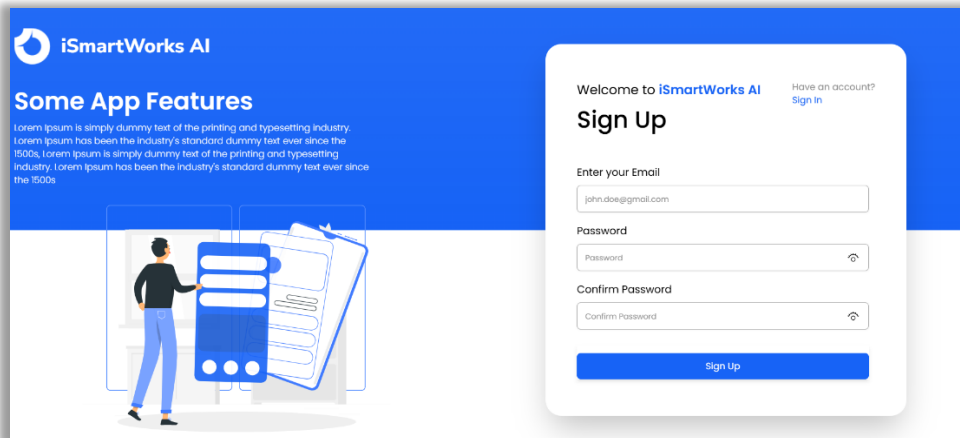
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1. Signup & Account Creation

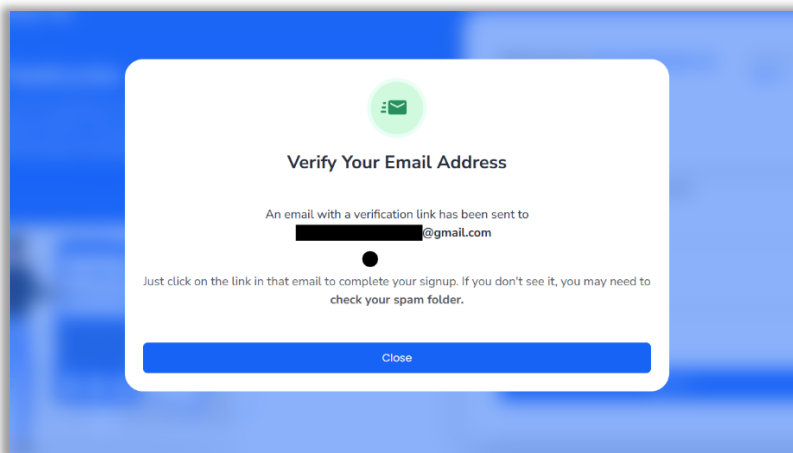
- Visit the URL: <https://ismartworks.ai>
- Go to the website and click “Sign Up”.



- 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.)

The screenshot shows the 'Admin Details' form in the iSmartWorks AI application. The form is divided into two tabs: 'Admin Details' (active) and 'Company Details'. The 'Admin Details' tab contains the following fields:

- First Name ***: Text input field.
- Middle Name**: Text input field.
- Last Name ***: Text input field.
- Address**: Text input field.
- City ***: Text input field.
- Province ***: Text input field.
- Postal Code ***: Text input field.
- Designation ***: Text input field.
- Country ***: Text input field.
- Phone Number ***: Text input field.

At the bottom of the form, there is a green 'Save' button. A small note at the bottom states: 'In order to process your registration, we ask you to provide the following information. Please note that all fields marked with an asterisk (*) are required.'

- **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.

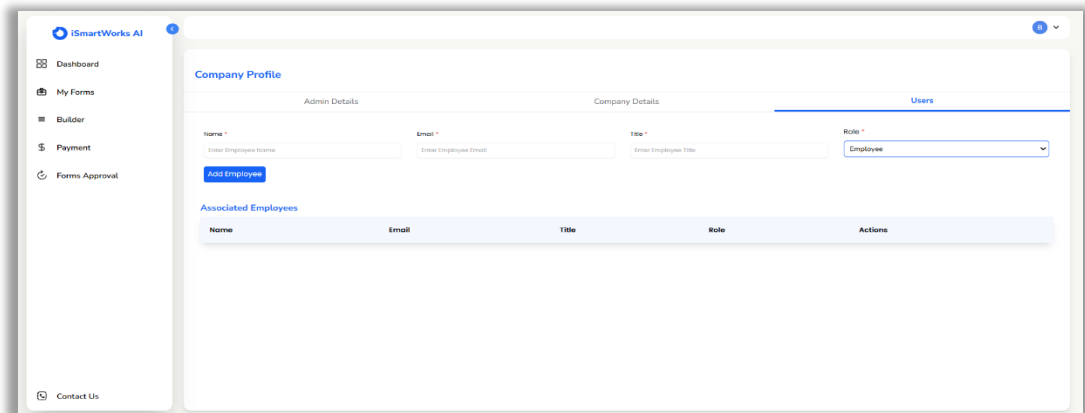
The screenshot shows the 'Plans & Pricing' section in the iSmartWorks AI application. The 'Payment' option in the sidebar is highlighted. The main content area displays a 'Contact for Price' button and a 'Standard' plan. The plan details are as follows:

Feature	Value
Number of Users	0+
Number of Forms	0
Monthly Submissions	0
Fields per Form	0
Multi Language Support	×
Total File Storage	×
Available Space	0 MB
Google Cloud Storage Connector	×
Custom Templates	×

At the bottom of the plan details, there is a 'Choose Plan' button. The 'MONTHLY' and 'YEARLY' tabs are visible at the top right of the pricing section.

3. User & Employee Management

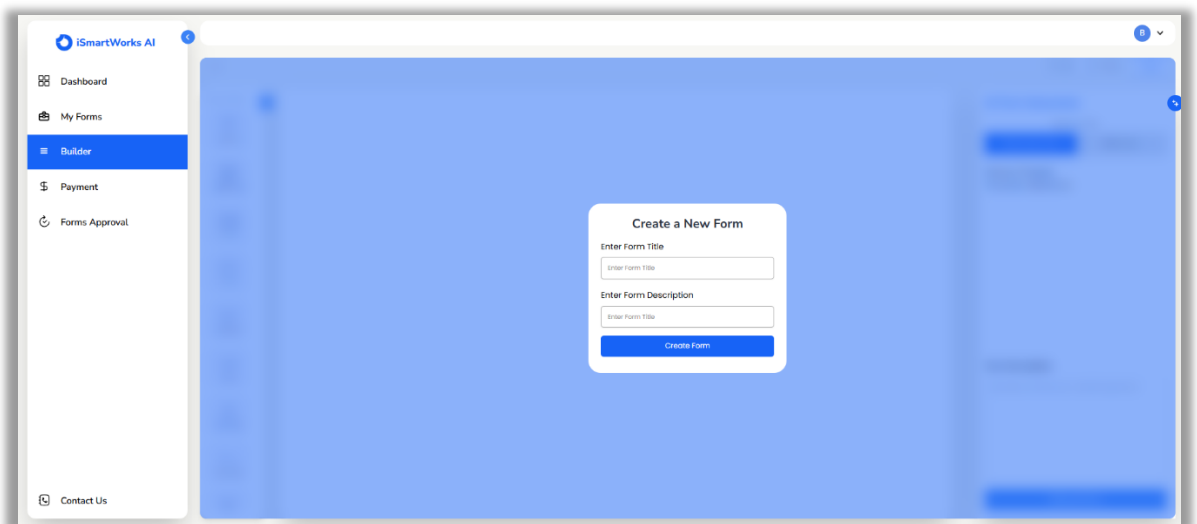
- After plan activation, go to the **“Profile”** section to add users/employees.
- Input employee details: Name, Email, Role, etc.
- Employees will receive login credentials on their email.
- Employees use the received email and password to log in and access forms.



The screenshot shows the 'Company Profile' page in the iSmartWorks AI application. The left sidebar contains navigation links: Dashboard, My Forms, Builder, Payment, Forms Approval, and Contact Us. The main content area is titled 'Company Profile' and has three tabs: Admin Details, Company Details, and Users. The 'Users' tab is active, displaying a form to add a new employee. The form includes fields for Name, Email, Title, and Role (a dropdown menu with 'Employee' selected). Below the form is a table titled 'Associated Employees' with columns for Name, Email, Title, Role, and Actions. The table is currently empty.

4. Dashboard Overview

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

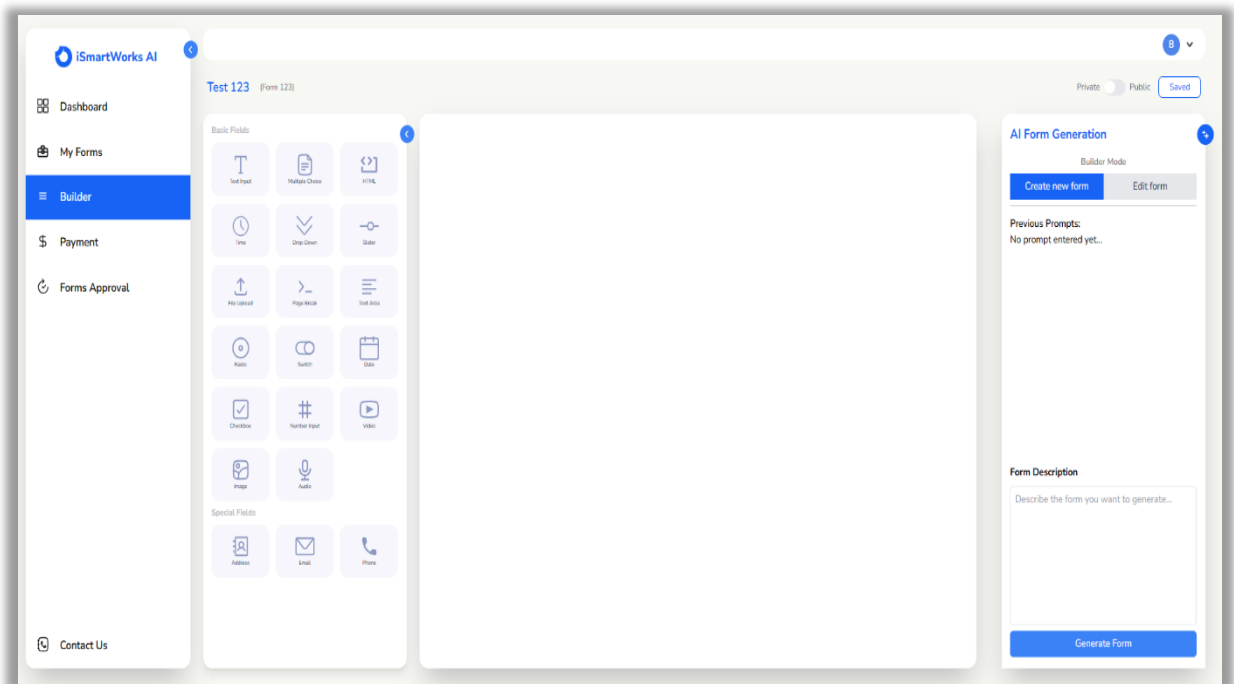


The screenshot shows the 'Create a New Form' dialog box in the iSmartWorks AI application. The left sidebar is the same as in the previous screenshot, with 'Builder' highlighted. The main content area is a solid blue background. The dialog box is a white rounded rectangle with the title 'Create a New Form'. It contains two input fields: 'Enter Form Title' and 'Enter Form Description'. Below these fields is a blue button labeled 'Create Form'.

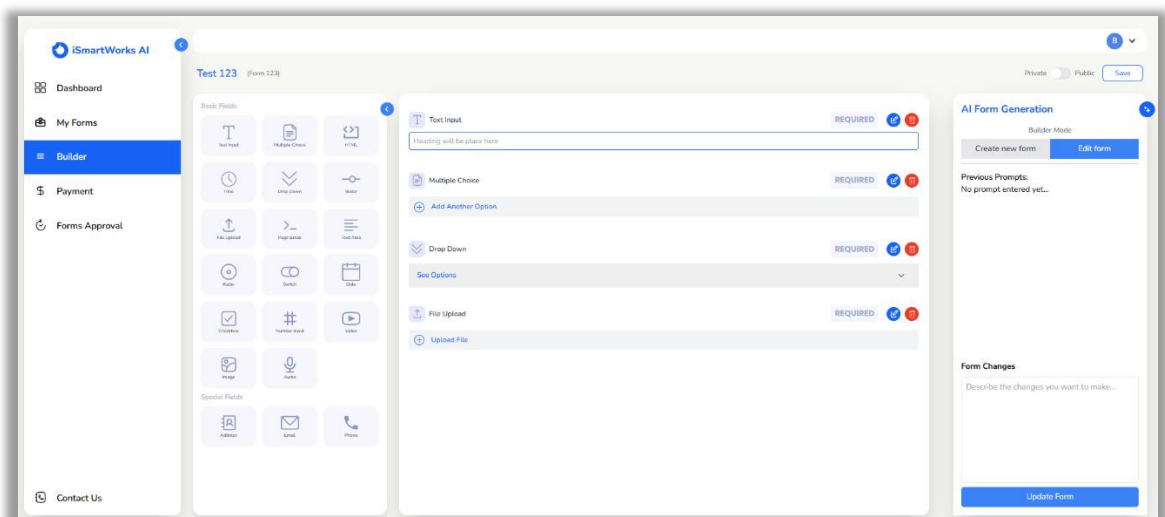
5. Form Creation Methods

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:
 - “Create a form with employee name, designation, and joining date”
- AI auto-generates fields as per your input.
- Use buttons:
 - “**Create New Form**”: start fresh
 - “**Edit Form**”: update existing drafts
- Fields can be modified manually after AI generation.
- Click “**Save**” when finalized.

The screenshot shows the iSmartWorks AI form builder interface. On the left is a sidebar with navigation options: Dashboard, My Forms, Builder (selected), Payment, and Forms Approval. The main area is titled 'Device Onboarding Fo...' and contains a grid of field types (Text, Number, Date, etc.) and a list of generated fields: Device Name, Device Type, Model Number, Serial Number, Purchase Date, and Comments. Each field has a 'REQUIRED' status and a 'See Options' link. On the right, there's an 'AI Form Generation' panel with 'Create new form' and 'Edit form' buttons, a 'Previous Prompts' section, and a 'Form Changes' section. A green notification at the top right says 'Form updated successfully!'.

6. Form Publishing & Approval

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

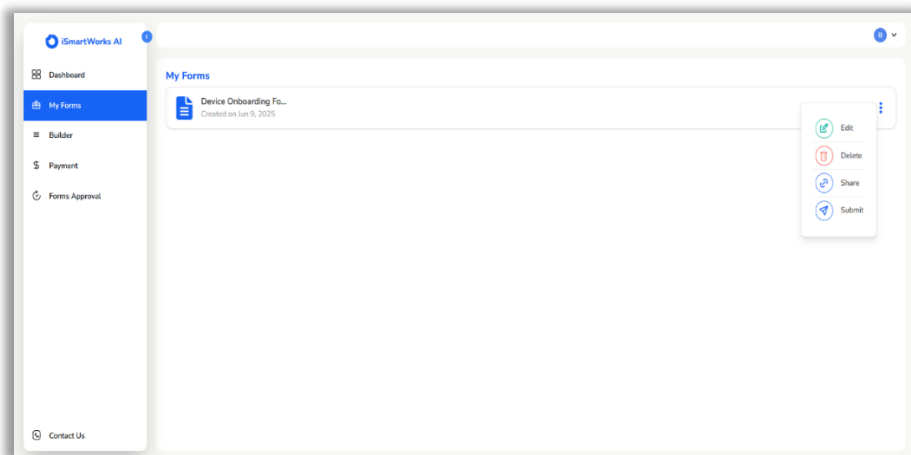
The screenshot shows the iSmartWorks AI form approval interface. The sidebar is the same as the previous screenshot, but the 'Forms Approval' tab is selected. The main area is titled 'Forms' and shows a list of forms with a 'Device Onboarding fo...' form selected. The form details are displayed on the right, including fields for Device Name, Device Type, Model Number, Serial Number, Purchase Date, and Comments. The form is marked as 'Draft' and has a 'Preview' button. The 'Comments' section shows 'No Comments'.

- Approved forms become **available to employees** via:
 - **Dashboard (Web)**
 - **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.

 This screenshot shows the 'Submit Form' page for the 'Device Onboarding' form. The form fields are:

- Device Name: Text input with value 'Test'
- Device Type: Dropdown menu with value 'Switch'
- Model Number: Text input with value '12345678'
- Serial Number: Text input with value '0000000'
- Purchase Date: Date picker with value '09-08-2025'
- Comments: Text area with value 'Test'

 A blue 'Submit' button is located at the bottom right of the form. A green notification banner at the top right states 'Form submitted successfully'. The sidebar on the left is identical to the previous screenshot.

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.

A screenshot of the "Sign in" screen of the mobile app. It features a white background with a blue header "Sign in". Below the header are three social login buttons: "Sign in With Google" (with Google logo), Facebook, and Apple. Underneath are two input fields: "Enter your Email" and "Enter your Password". The password field has a toggle icon for visibility. At the bottom, there are links for "No Account? Sign up" and "Forgot Password", and a large blue "Sign in" button.

- Access available forms from mobile.
- Submit forms on-the-go, which sync with the admin portal.

A screenshot of the "My Forms" screen of the mobile app. It has a white background with a blue header "My Forms". Below the header is a card for a form titled "Device Onboarding Fo..." with a subtitle "Created on Jun 9, 2025" and a right arrow. At the bottom is a blue navigation bar with three icons: a folder for "My Forms", a person for "Profile", and a bell for "Notification".

< 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

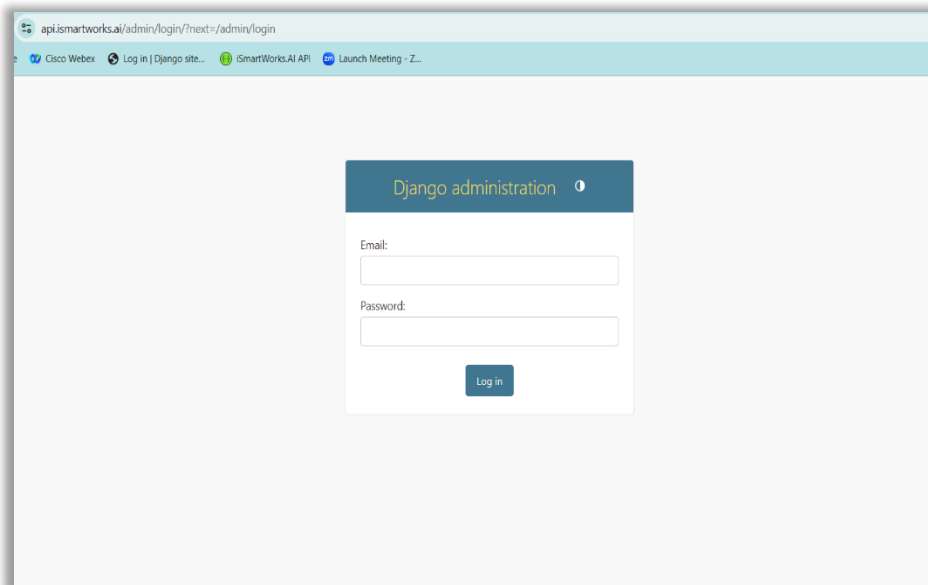
Profile

Notification

8. Admin Portal Access

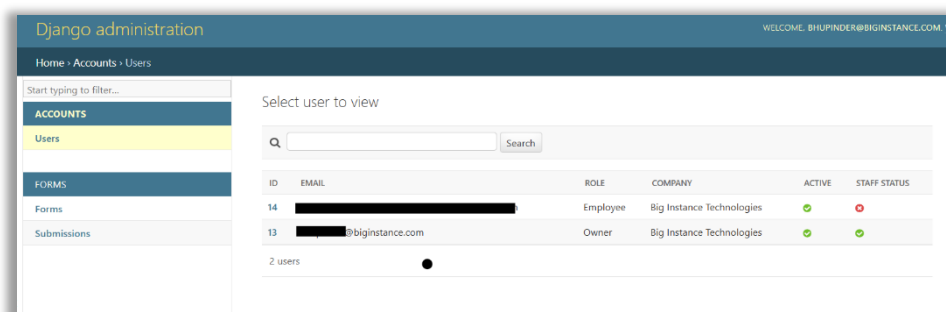
Visit: <https://api.ismartworks.ai/admin/login>

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



The screenshot shows the Django administration login page. The browser's address bar displays 'api.ismartworks.ai/admin/login/?next=/admin/login'. The page features a central login form with the title 'Django administration'. The form includes fields for 'Email:' and 'Password:', followed by a 'Log in' button. The background is a light gray gradient.

- Admin Portal Features:
 - View **all users** registered under the company.

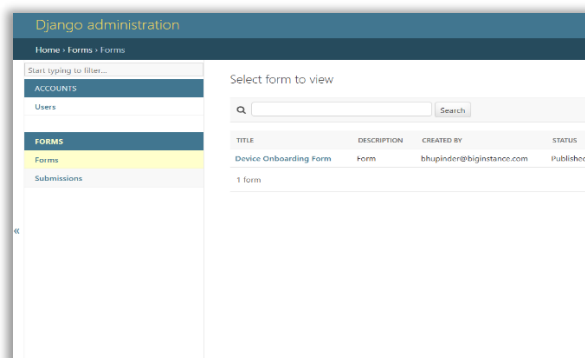


The screenshot shows the 'Users' view in the Django administration interface. The left sidebar contains a navigation menu with 'ACCOUNTS' and 'FORMS' sections. The main content area is titled 'Select user to view' and includes a search bar. Below the search bar is a table listing users.

ID	EMAIL	ROLE	COMPANY	ACTIVE	STAFF STATUS
14	[REDACTED]	Employee	Big Instance Technologies	✓	✗
13	[REDACTED]@biginstance.com	Owner	Big Instance Technologies	✓	✓

Below the table, it indicates '2 users'.

- View and manage **all created forms**.



The screenshot shows the 'Forms' view in the Django administration interface. The left sidebar contains a navigation menu with 'ACCOUNTS' and 'FORMS' sections. The main content area is titled 'Select form to view' and includes a search bar. Below the search bar is a table listing forms.

TITLE	DESCRIPTION	CREATED BY	STATUS
Device Onboarding Form	Form	bhupinder@biginstance.com	Published

Below the table, it indicates '1 form'.

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

Start typing to filter...

ACCOUNTS

Users

FORMS

Forms

SUBMISSIONS

View submission

Submission 16 - Device Onboarding Form

Form: Device Onboarding Form

Employee: bhupinder@biginstance.com

Geo coordinates: [0,0]

SUBMISSION ITEMS

FIELD	VALUE
16 - Device Name	Device Onboarding Form - Device Name
16 - Device Type	Device Onboarding Form - Device Type
16 - Model Number	Device Onboarding Form - Model Number
16 - Serial Number	Device Onboarding Form - Serial Number
16 - Purchase Date	Device Onboarding Form - Purchase Date
16 - Comments	Device Onboarding Form - Comments

Close

9. Admin Panel Functionalities

- **Manage Users:** Edit, remove or update user information.
- **Form Access:**
 - View created forms.
 - Check form statuses (draft, published, etc.).
- **Submissions View:**
 - Track who submitted what, when, and from where.
 - View detailed field-level data of submitted forms.
 - 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