

Use the AI helper

Tell the AI helper in plain words what to change, and it changes your form. It can also build a whole form from a description, or rebuild an old form from a PDF or photos.

The AI helper changes your form from plain words. It uses your business's own Claude key, from Anthropic.

What you can ask

Ask for a change in your own words, for example:

- "Put a hazards table after the job details."
- "Put the job number beside the client and the site address."
- "Change the font to Arial and the colours to green."
- "Make the Pass / Fail answers ticks and crosses."
- "Add a risk matrix."

Each request can be taken back with **Undo these changes**.

Build a whole form

1. Start a blank form.
2. Press **AI helper** in the top bar.
3. Describe what you need, for example: "A gas safety check with job details, checks with ticks and crosses, photos and a sign-off."

The helper builds the form step by step. It works best on everyday forms. A very complex form may be too much for it.

Read an old form

1. Press **AI helper** in the top bar.
2. Press the paper clip.
3. Attach a PDF of your old form, or up to 4 photos of its pages.
4. Press **Send**.

The helper rebuilds the form, step by step, with the same questions in the same order.

Turn it on (the business owner only)

1. Make a Claude key at console.anthropic.com, under **API keys**. Add some credit to that Anthropic account.
2. In Form Designer, press the **More** button (:) at the right of **Download**, then **AI helper**.
3. Paste the key in **Claude key**.
4. Tick **Turn on the AI helper for everyone who uses Form Designer**, and press **Save**.

After that, everyone in your business who uses Form Designer can press **AI helper** in the top bar.

In **Model**, we recommend Claude Sonnet 5.5, or Claude Haiku 5.5. Both are fast and cost little.

Good to know

- The AI helper is part of the Standard and Pro plans.
- It uses your business's own Claude key. Anthropic bills your Claude account for each use. Small changes cost very little.
- The words of your form, and any old form you attach, go to Anthropic with each request.
- The key is kept sealed in your ServiceM8 account, and is never shown again.
- Each request can be undone with **Undo these changes**.

- It does not add logos or pictures. Add those by hand.
- Always check the form before you download it: read every page in **Preview**, and run the form with different answers.