

Fai, The FormAssembly AI Assistant

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Introduction

Fai is a companion tool designed to accelerate the creation, editing, theming, and insights of assets (forms, themes, workflows). Fai accepts natural language prompts and instructions in plain English. Tell Fai what you want and let the AI Assistant handle the heavy lifting. Fai also answers questions about form performance, helps improve existing forms and workflows, and can connect you with our Support and Sales teams for faster, human-led query resolution.

Fai can assist with the following types of prompts:

- **Form Creation & Edits:**
 - Create and edit forms with various field types (text, dropdowns, file uploads, etc.)
 - Set up conditional logic and validation rules
 - Customize form appearance and styling with themes
 - Create a form using uploaded files
 - Translate existing forms into different languages
- **Workflows Creation & Edits:**
 - Build automated workflows or edit existing workflows.
 - Set up multi-step processes and approval workflows
- **Theme Creation and Branding:**
 - Generate brand-consistent designs
 - Upload pictures or screenshots, or describe them in words
 - Customize themes to match your brand colors and fonts
 - Apply consistent styling across multiple forms
- **Connector Configurations:**
 - Receive guidance on connector configurations
 - Connect forms to third-party services like:
 - **CRMs:** Salesforce, HubSpot
 - **Spreadsheets:** Google Sheets, Excel
 - **File Storage:** Google Drive, SharePoint, Box, Dropbox
 - **Custom integrations:** Webhooks for any HTTP endpoint
- **Form-Related Analytics Q&A:**
 - Ask questions about responses, form performance, and other related topics
- **Sales & Support Q&A:**
 - Get answers to Sales or Support queries
 - Initiate a live chat with a human agent to help resolve your queries faster!

Data Collection & Privacy

- We do **not** collect any data to train any AI model.
- Form responses, workflows, and personally identifiable information (PII) are **not stored or used for AI training**.
- The AI Assistant does **not auto-save** changes to forms or workflows. Users must click **Save** to persist edits.
- Users can choose to opt in or opt out of sharing their feedback on AI Assistant responses and their prompts with FormAssembly to improve the product. Users can use the AI Assistant irrespective of whether they decide to share their prompts with us or not.

Stability Notes

- Asset names must be spelled correctly; otherwise, Fai may create a new asset instead of editing an existing one. (Fix coming soon.)
- The **Save** button must be clicked manually; the AI does not auto-save changes.
- Workflows and connector execution are not supported yet.
- Closing or navigating away mid-task cancels the current action.

Prompt Guidelines

Fai's performance relies on good prompting from you. To achieve the best results, write specific, context-rich prompts and always review the AI's output before saving.

A good prompt includes:

- **Action** → what to build or edit
- **Details/Constraints** → fields, logic, style, limits
- **Context/Outcome** → purpose of the form or desired result

A good prompt will look something like "[**Action**] + [**Details/Constraints**] + [**Context/Outcome**]"

Good Prompt Example: "Create a customer satisfaction survey with five questions (mix of rating and text), add a progress bar, and use our brand's red/white color scheme."

Bad Prompt Examples:

- "Build me a form." → No purpose or fields given.
- "Make this form better." → "Better" is subjective.
- "Use company colors." → Which exact colors?
- "Fix this form." → Doesn't specify what's broken.

Use Case	☒ Bad Prompt	☒ Good Prompt

Form Creation	"Build me a form."	"Create an event registration form with name, email, phone, and a dropdown for session selection."
Form Editing	"Fix this form."	"Simplify this feedback form: merge first/last name, reduce to max 8 questions, and keep only one email field."
Theme & Branding	"Make it look nice."	"Style this checkout form with teal (#008080), white background, bold headers, and a rounded 'Submit' button."
Conditionals	"Add logic."	"If 'Student' = Yes, show School Name and Year of Graduation; if No, skip to next section."

Prompt Examples

Form Creation

- Generate new forms from scratch by describing required fields, logic, and purpose.
- **Example:** "Create an event registration form with name, email, phone number, and a dropdown for session selection. Make it mobile-friendly."
- **Example:** "Create a job application form with fields: Name, Email, Phone, Resume Upload, and Position Applied. Make all fields required except Phone."

Form Editing

- Modify structure (add/remove fields), simplify layout, or split long forms into multi-page flows.
- **Example:** "Simplify this feedback form: remove duplicate fields, combine ratings into a single 1–5 scale, and keep total questions under 8."
- **Example:** "Split this admission form into 3 pages: Page 1 = Personal Info, Page 2 = Academic Details, Page 3 = Upload Documents. Add a progress bar."

Translate Forms

- Ask Assistant to convert the complete form into a different language, like French, Arabic, Hindi, and it will do it to the best of its abilities.
- **Example:** "Convert all the pages of the form XYZ into French"

Theme & Branding

- Apply brand colors and styles by describing the theme, from a URL or hex codes, or by adding a picture as an attachment to create a theme.
- **Example:** "Generate a theme for University of XYZ: navy blue (#001F54), gold (#FFD700), white background, and formal serif font."
- **Example:** "Apply a professional, minimal theme suitable for a healthcare intake form—light blues, soft greys, and clear spacing."

Analytics & Q&A

- Query form performance and usage.
 - **Example:** "What was the average completion time last week?"
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