crunchtime OPS EXECUTION

Build a Form with AI

QuickStart Guide

Document Details

Document #: OEQS00001_261119

Version Release Date: November 2026

System Requirements

- For system and browser requirements, click here: Ops Execution Knowledge Base/System Requirements
- Ops Execution supports all new browser versions within 7 days of release and maintains support for the last 2 releases of each browser. ⛔ **Internet Explorer is NOT supported.**

Overview

Use Generate with AI in Ops Execution to turn a form you already have into an editable Ops Execution form or describe the form you want and let AI build it from scratch. After it's published, make any edits to the form in the form builder. This guide is for Corporate Systems Admins and above-store leaders who are new to the feature.

Download the latest version of this document here:
https://links.crunchtime.com/OEQS-AIFormBuilder

… or scan the QR code to the left.

Take an interactive walk-thru
https://links.crunchtime.com/OEFT-AIFormBuilder

Tip: Keep your original form open next to the published form in Ops Execution, so you can compare each question.

Note: A published form is the first version for you to review and edit. It is not the finished form.

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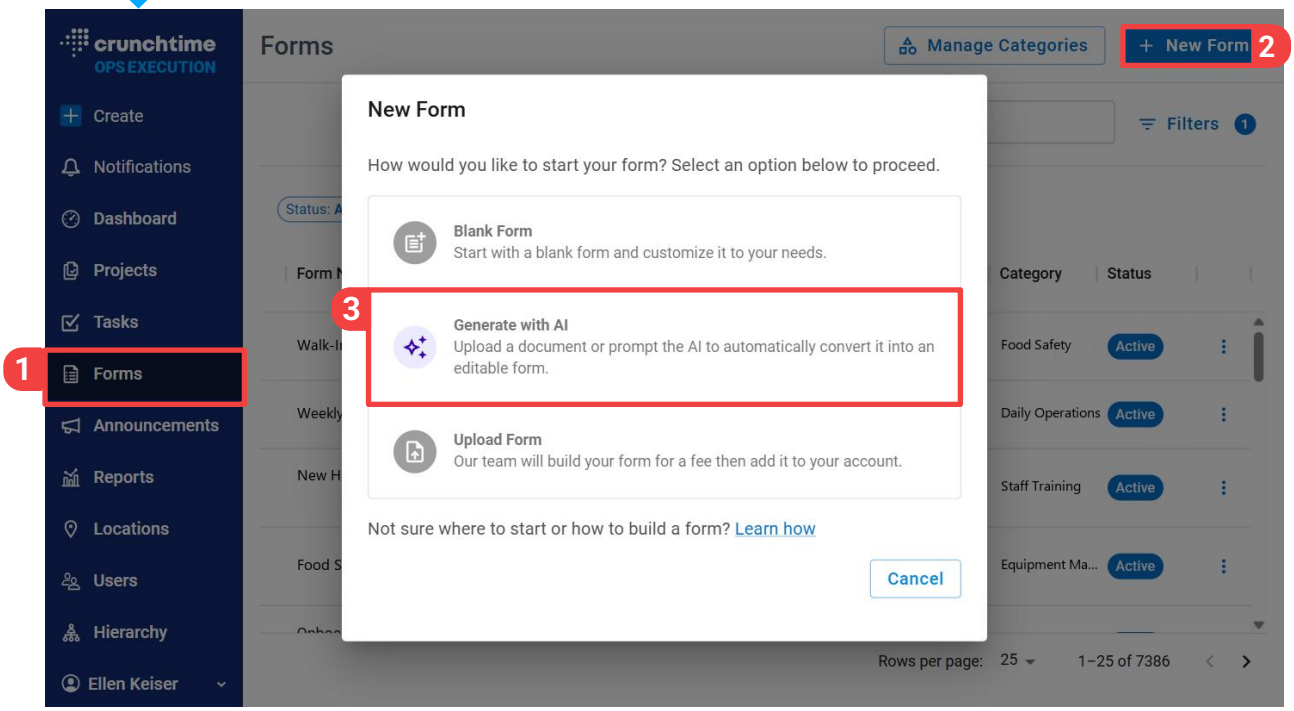
QUICKSTART GUIDE

Start a Form with AI

Open the Generate with AI Option

A form is how your team collects information in the app - checklists, logs, inspections - built from the questions you need answered. Start here when you want AI to build a form for you, either from a file you already have or from a short description.

Ops Execution > Forms > New Form > Generate with AI



1. Select *Forms* in the nav bar to navigate to the *Forms* page.
2. Select *New Form* at the top right of the page.
   - The *New Form* window shows three ways to start:
     - *Blank Form*
     - *Generate with AI*
     - *Upload Form*
3. Select *Generate with AI*.

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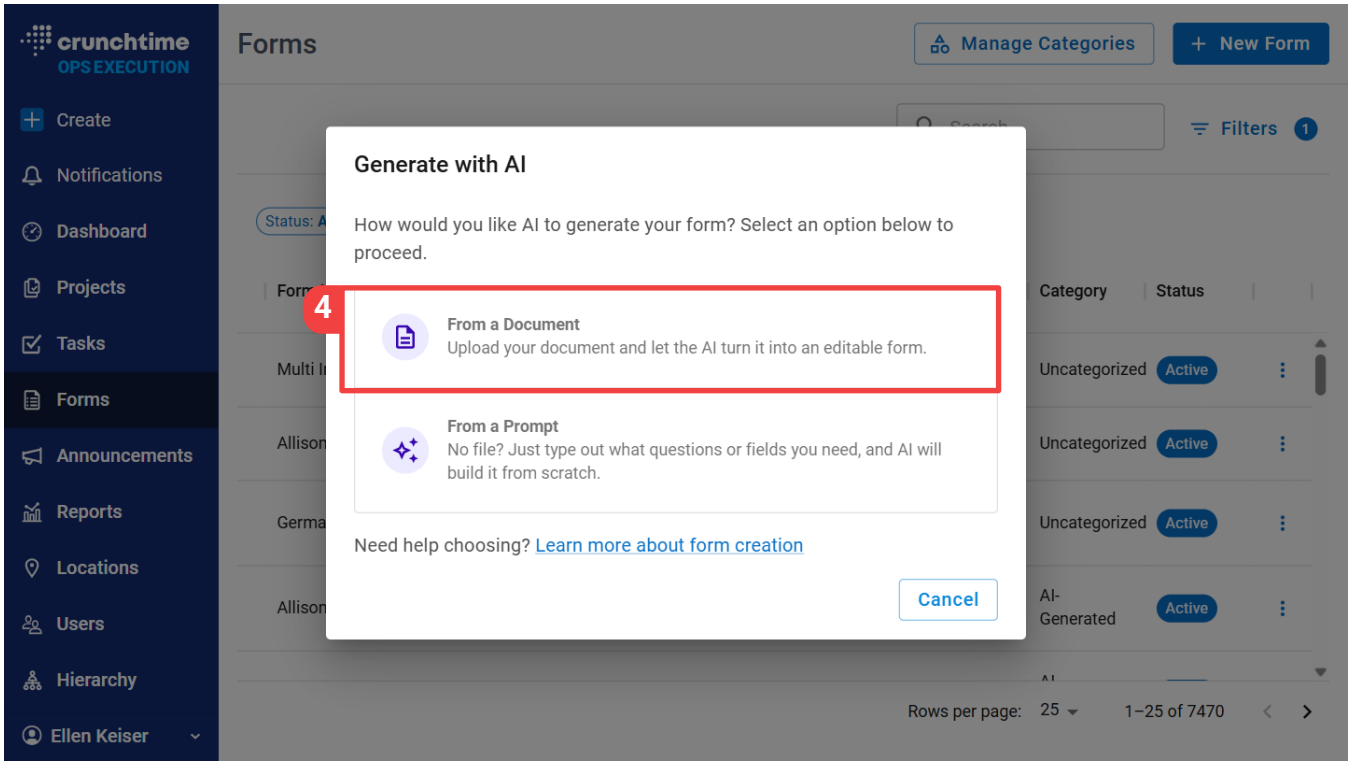
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Start a Form with AI

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Open the Generate with AI Option

Ops Execution > Forms > New Form > Generate with AI > From a Document



A new window asks how you'd like AI to generate your form, with two options: *From a Document* and *From a Prompt*.

4 Select *From a Document*.

Note: To describe your form instead of uploading a file, select *From a Prompt* and continue with "Describe Your Form and Generate." For instructions to use *From a Prompt*, see Page 10.

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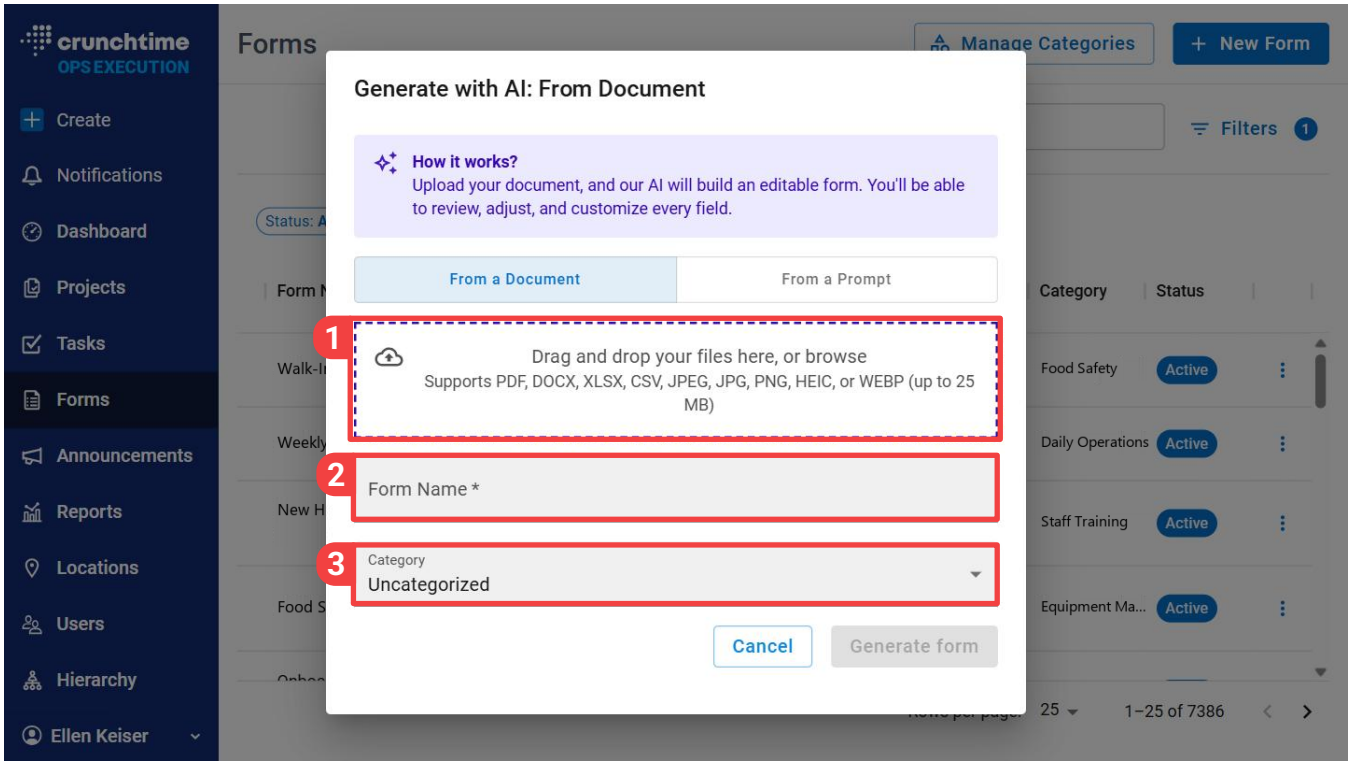
QUICKSTART GUIDE

Add Your File and Generate Form

Add a File, Name the Form and Generate

The AI needs a file to read, a name for the new form and a category. *Category* is always optional and will default to *Uncategorized*. The *Generate form* button stays grey until you finish these.

Ops Execution > Forms > New Form > Generate with AI > From a Document



1. Drag your file into the upload area, or browse your computer to find it.
   - The upload area lists the file types it accepts, including PDF, DOCX, XLSX, CSV, JPEG, JPG, PNG, HEIC or WEBP (up to 25 MB).
2. Enter a name for your form in *Form Name*.
   - Pick a name your team will recognize in the Forms list.
3. Form *Category* is optional. Choose a category from the *Category* list, or leave it at the default *Uncategorized*. You can edit, create or delete form categories by selecting *Manage Categories* from the *Forms* page

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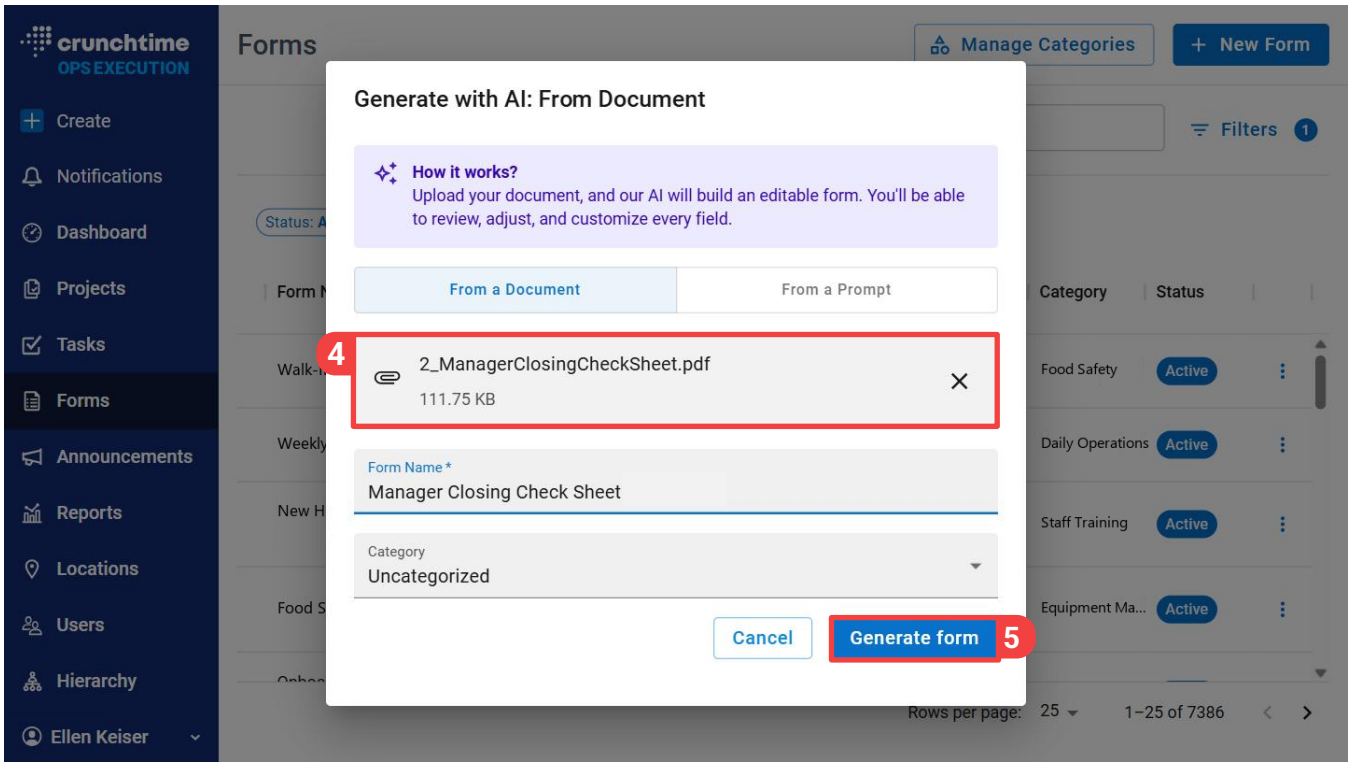
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Add Your File and Generate Form

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Add a File, Name the Form and Generate

Ops Execution > Forms > New Form > Generate with AI > From a Document



4. Check that the file name shows in the upload area and that *Generate form* is now active.
5. Select *Generate form*.

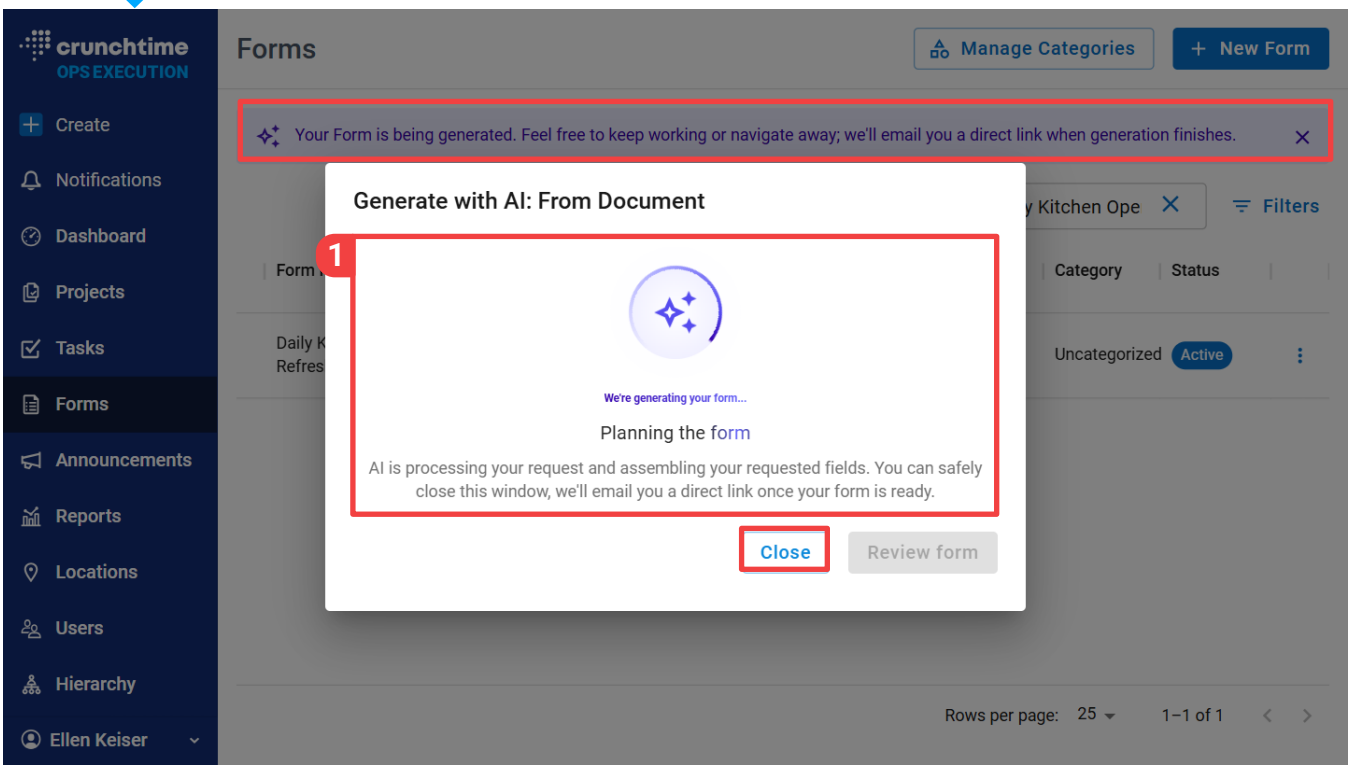
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Let the AI Work, Then Open Your Form

Wait While the AI Builds Your Form

The AI builds your form after you select *Generate form*. A spinner and a message show while it works.

Ops Execution > Forms > New Form > Generate with AI > From a Document



1. You can wait while the spinner and message show or while AI is processing your request, you can safely close this window while the form generations continues in the background.
   - The message updates with which section the AI is building, for example “Building section Financials and Computer (2/3).”
   - The window has a *Close* button if you want to close it while you wait; a banner at the top of the page confirms you can keep working or navigate away. A direct link will be emailed to you once your form is ready or you can wait for the *Review Form* button to activate once the form generation has finished.

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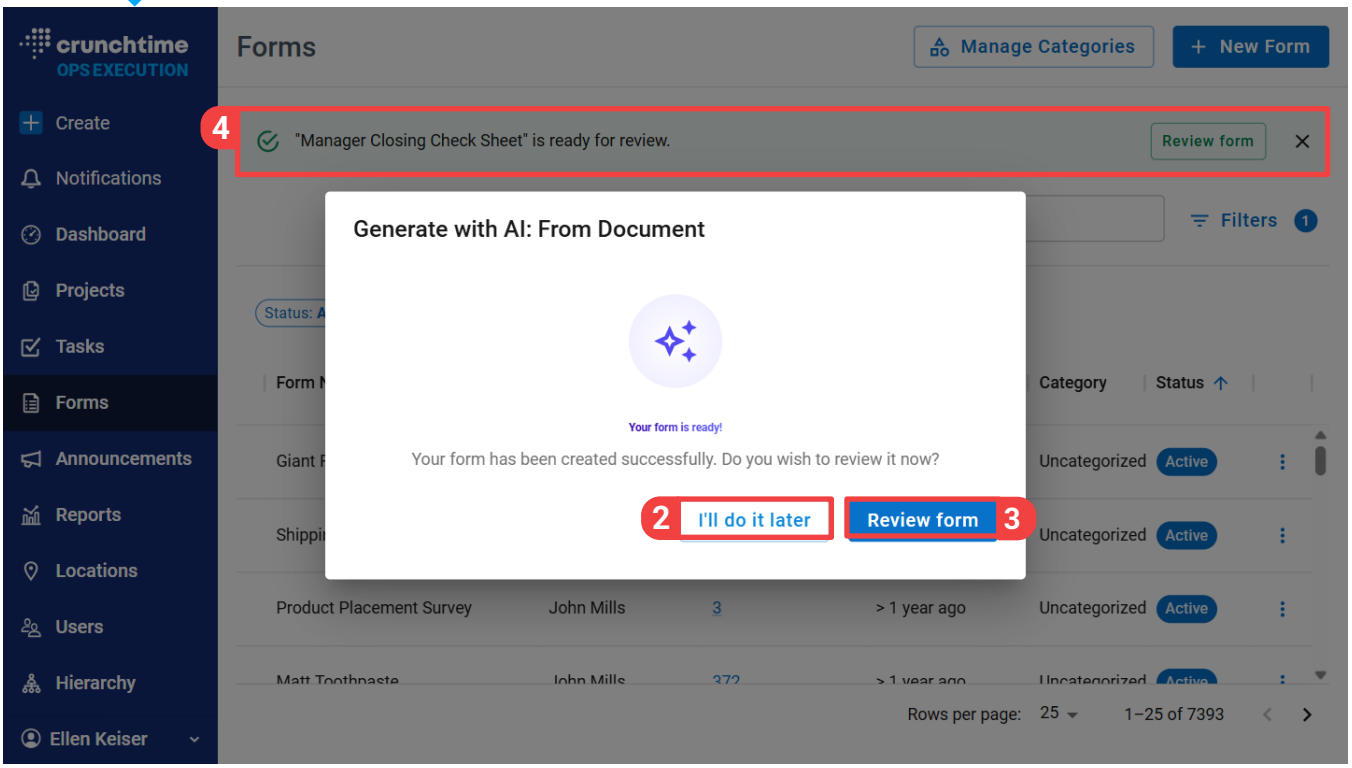
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Let the AI Work, Then Open Your Form

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Wait While the AI Builds Your Form

Ops Execution > Forms > New Form > Generate with AI > From a Document



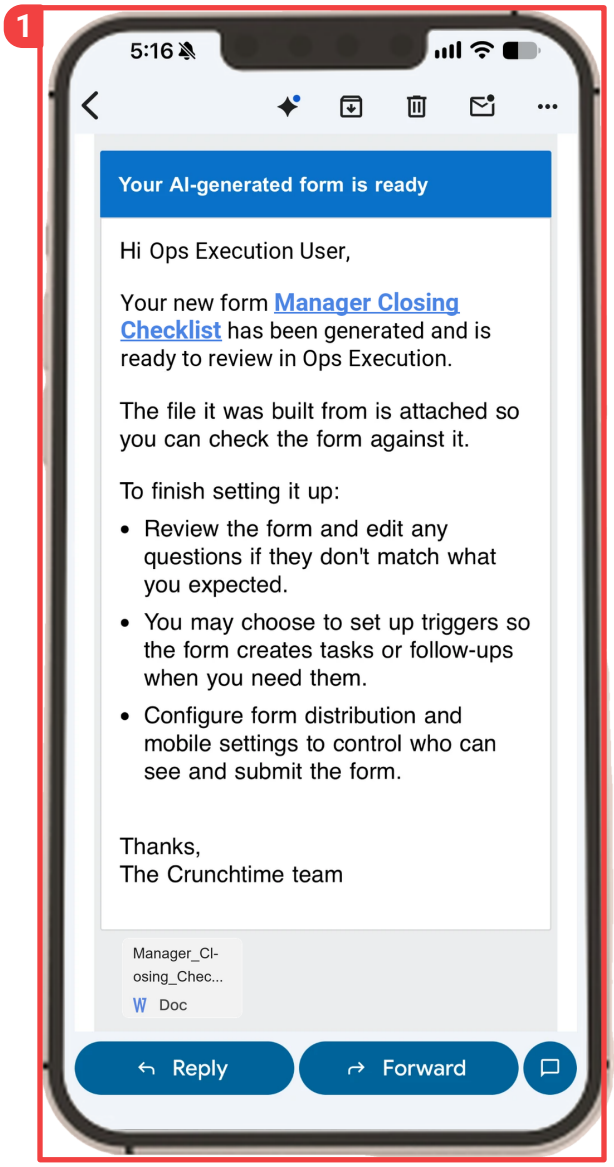
2. I'll do it later closes the window on the *Forms* page.
3. Select *Review form* to open your form in the form builder
4. A banner at the top also has a *Review form* button and will remain on the Forms page until you close it or for 30 minutes after it appears.

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Access Your AI-Generated Form from Email

Review the Email with Link to Form

Anytime you create an AI-generated form, you will receive an email with a direct link to the form in Ops Execution.



1 In addition to a direct link to the form in Ops Execution, the email will also include the file it was built from as an attachment so you can check the form against it, as well as these helpful tips to finish setting up your form:

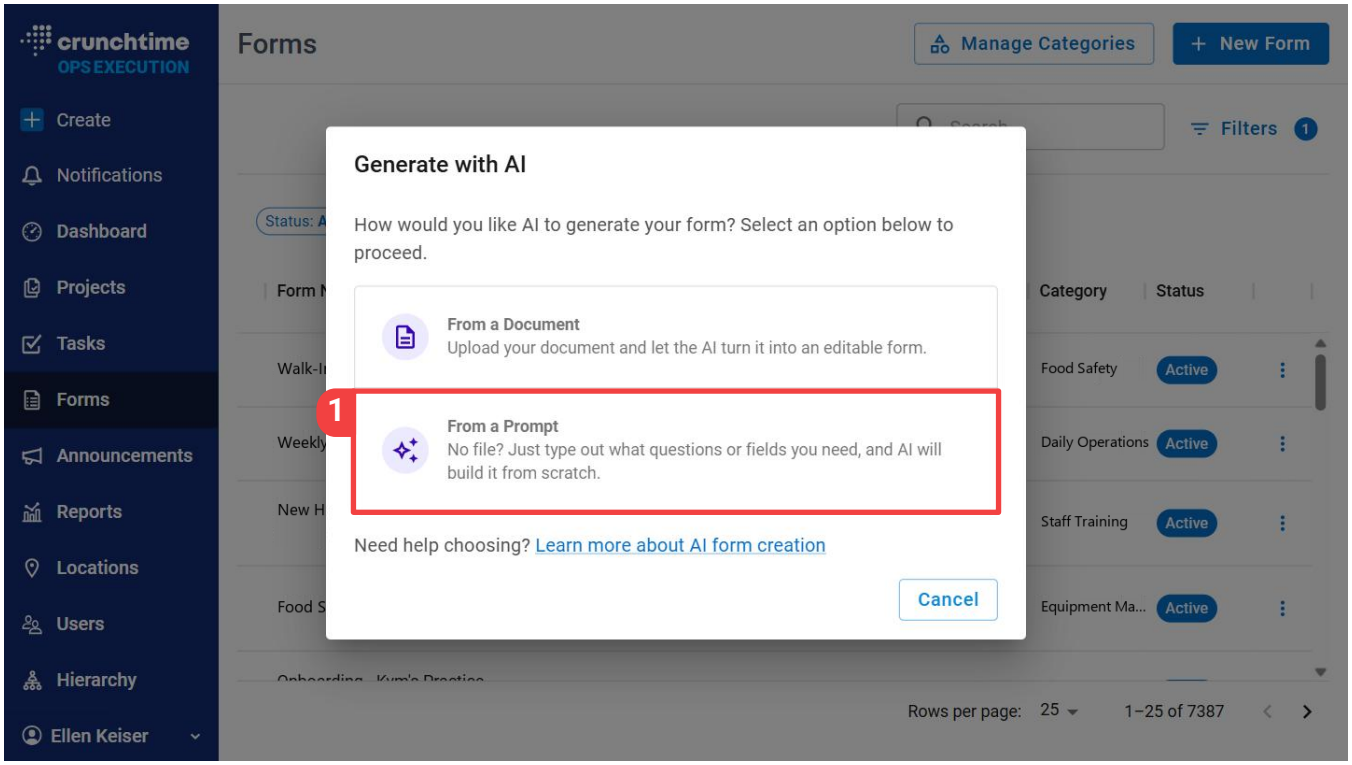
- Review the form and edit it in the form builder to ensure your questions match what you expected.
- Set up triggers so the form creates task or follow-ups when you need them.
- Configure form distribution and mobile settings to control who can see and submit the form.

Use a Prompt to Describe and Generate Your Form

Using Prompts to Describe Your Form, Name It and Generate

The AI needs a short description of the form you want and a name for the new form. The *Generate form* button stays grey until you finish these. *Category* is always optional and will default to *Uncategorized*.

Ops Execution > Forms > New Form > Generate with AI > From a Prompt



1 From the Generate with AI screen, select *From a Prompt*.

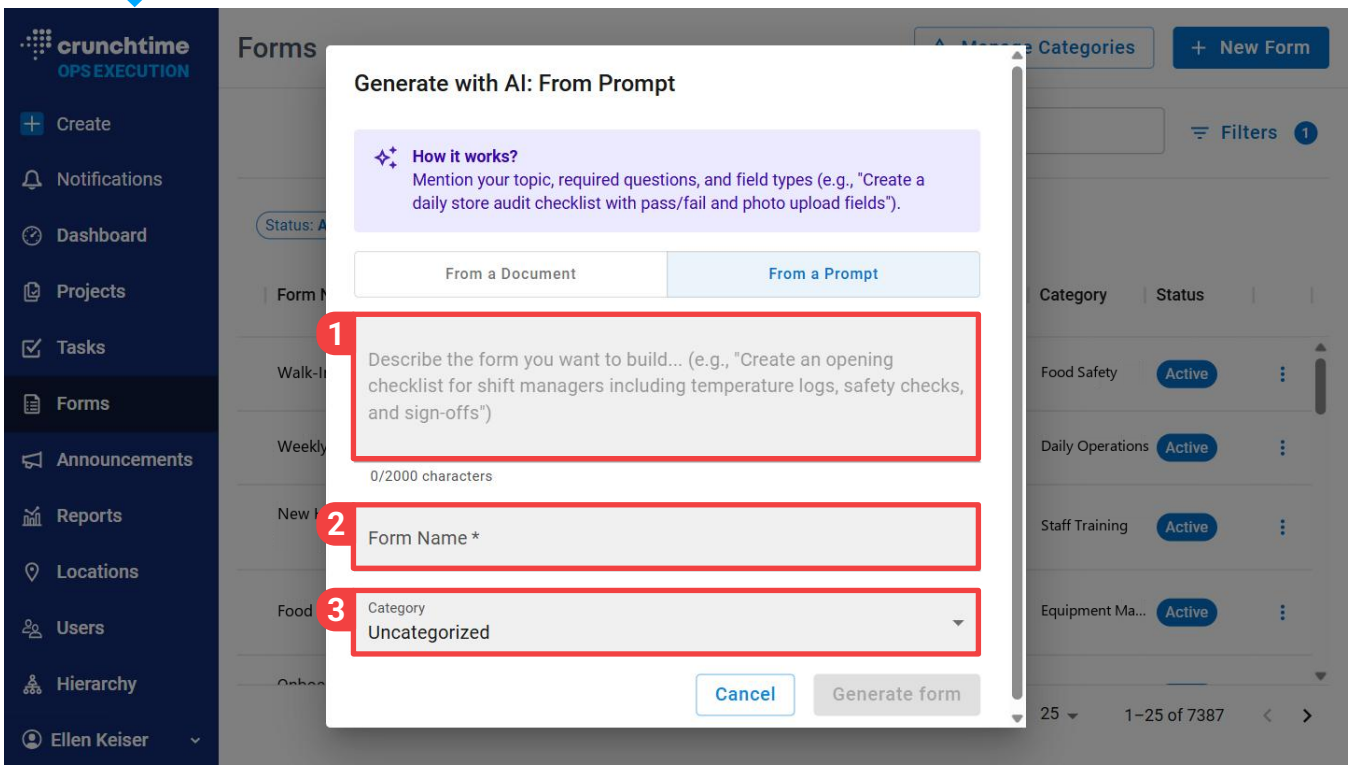
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Use a Prompt to Describe and Generate Your Form

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Using a Prompt to Describe Your Form, Name It and Generate

Ops Execution > Forms > New Form > Generate with AI > From a Prompt



1. Describe the form you want to build in the text box, including your topic, the questions you need and the field types.
   - The box accepts up to 2,000 characters and shows a running character count.
2. Enter a name for your form in *Form Name*.
3. Form *Category* is optional. Choose a category from the *Category* list, or leave it at the default *Uncategorized*. You can edit, create or delete form categories by selecting *Manage Categories* from the *Forms* page

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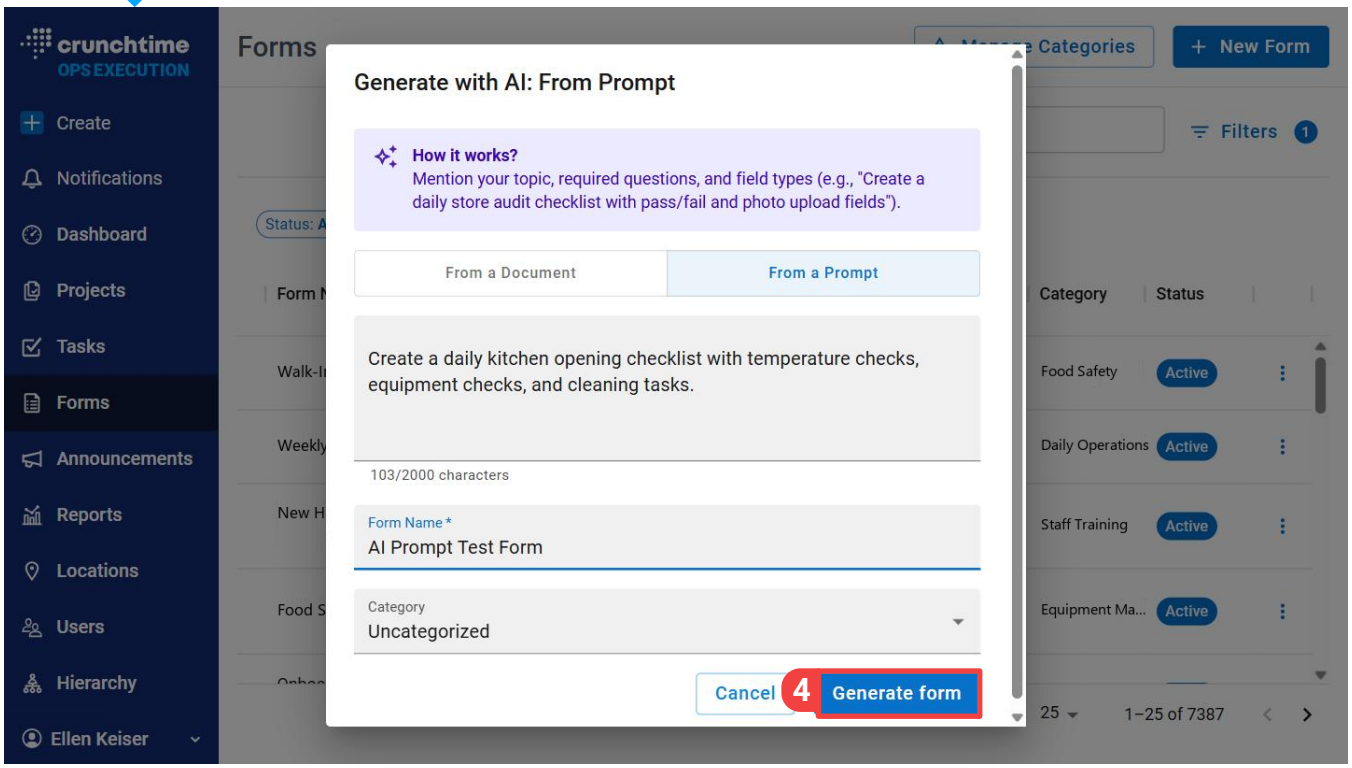
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Use a Prompt to Describe and Generate Your Form

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Using a Prompt to Describe Your Form, Name It and Generate

Ops Execution > Forms > New Form > Generate with AI > From a Prompt



Check that *Generate form* is now active.

4 Select *Generate form*.

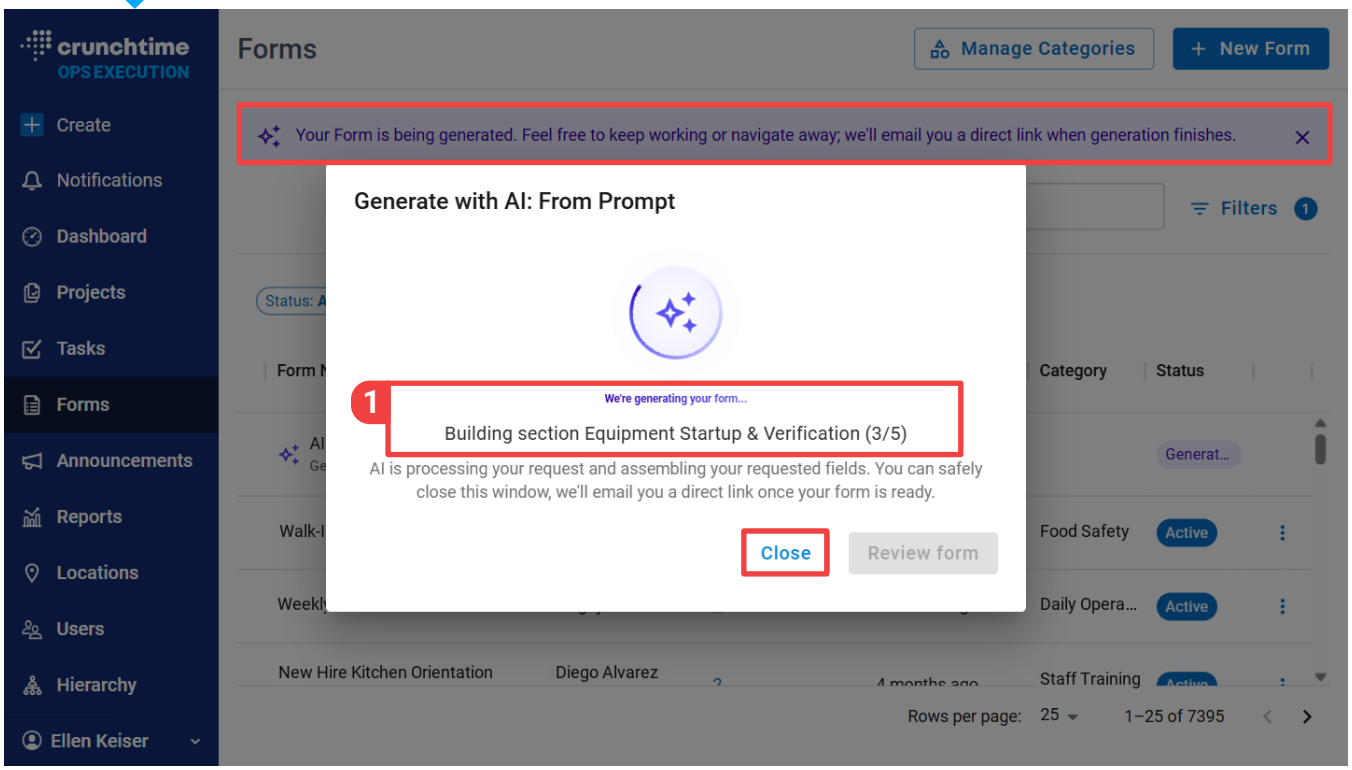
QUICKSTART GUIDE

Let the AI Work, Then Open Your Form

Wait While the AI Builds Your Form

The AI builds your form after you select *Generate form*. A spinner, a progress message and a banner show while it works.

Ops Execution > Forms > New Form > Generate with AI > From a Prompt



1 Wait while the progress spinner and message show.

- The message updates with which section the AI is building, for example “Building section Cooking & Hot Holding Equipment Startup (3/7).”
- The window has a *Close* button if you want to close it while you wait; a banner at the top of the page confirms you can keep working or navigate away. A direct link will be emailed to you once your form is ready or you can wait for the *Review Form* button to activate once the form generation has finished.

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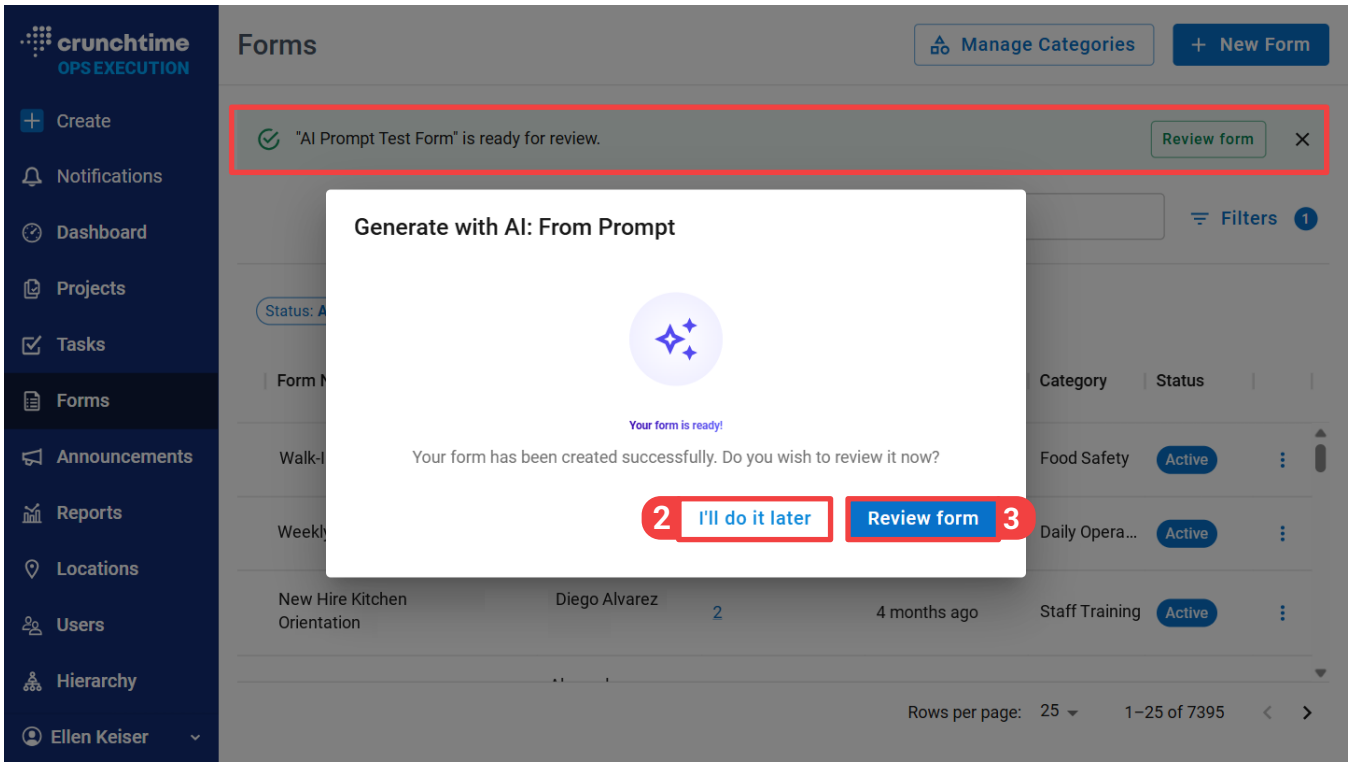
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Let the AI Work, Then Open Your Form

(Continued)

Wait While the AI Builds Your Form

Ops Execution > Forms > New Form > Generate with AI > From a Prompt



2. Select *I'll do it later* to close the window on the Forms page.
3. Select *Review form* to open your form.
    - A banner also confirms the form is ready, with its own *Review form* link. This banner will remain on screen until it's closed or for 30 minutes after it appears.

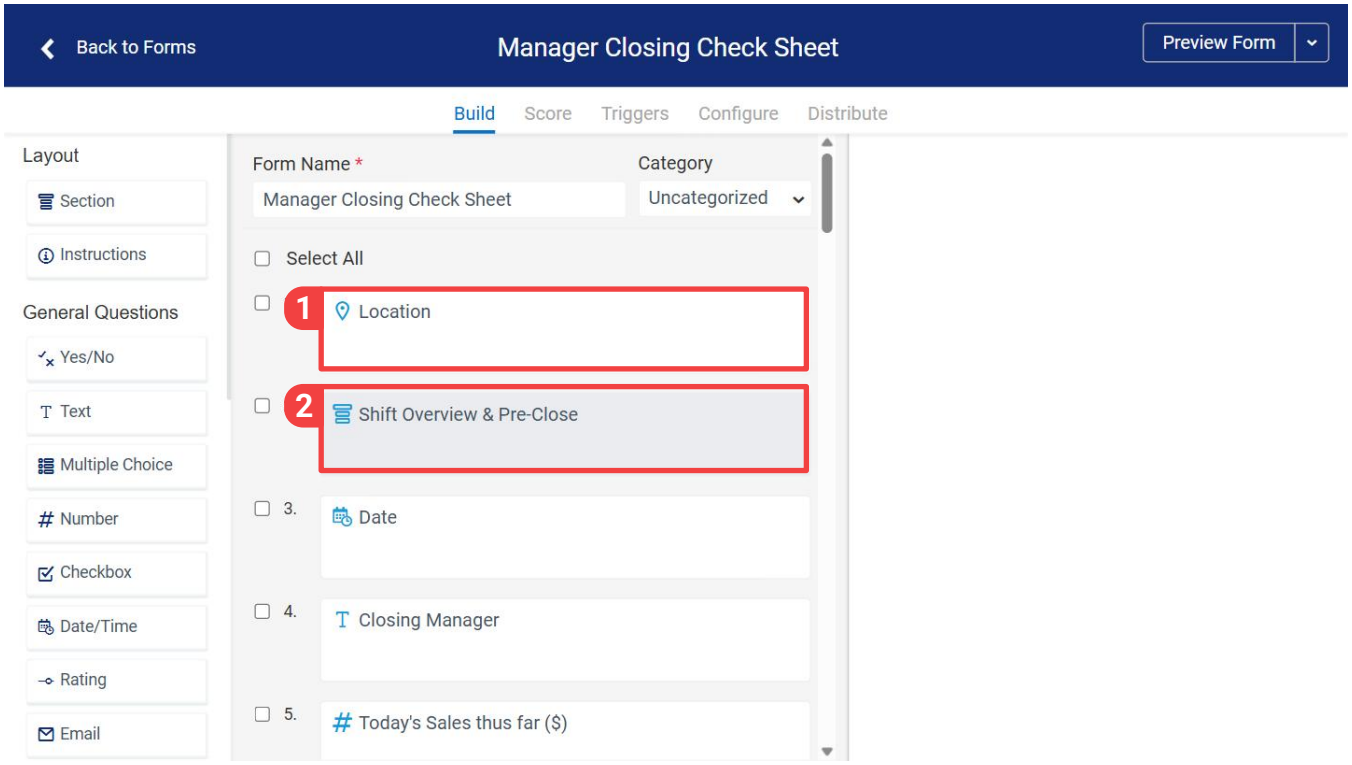
Note: Selecting *Review form* opens the same Form Builder used for document-based forms.

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Review and Edit the Form After You Publish

Review the Form in the Form Builder

The published form opens in the form builder, the screen where you build and change forms. It works like any form you build yourself, so you can edit, move or delete any question. This applies whether your form came from a document or from a prompt.



- Check that the form opens in the form builder.

1. It is possible that your original PDF form did not have sections or field types, but we add them for clarity. You should check that your form is correct and all questions are there, but it might not be a perfect 1x1 mapping. The form builder built the form to fulfill the user's intent while also ensuring it will work well within Ops execution.
2. Read the instructions on each question, so your team gets the same guidance as before.

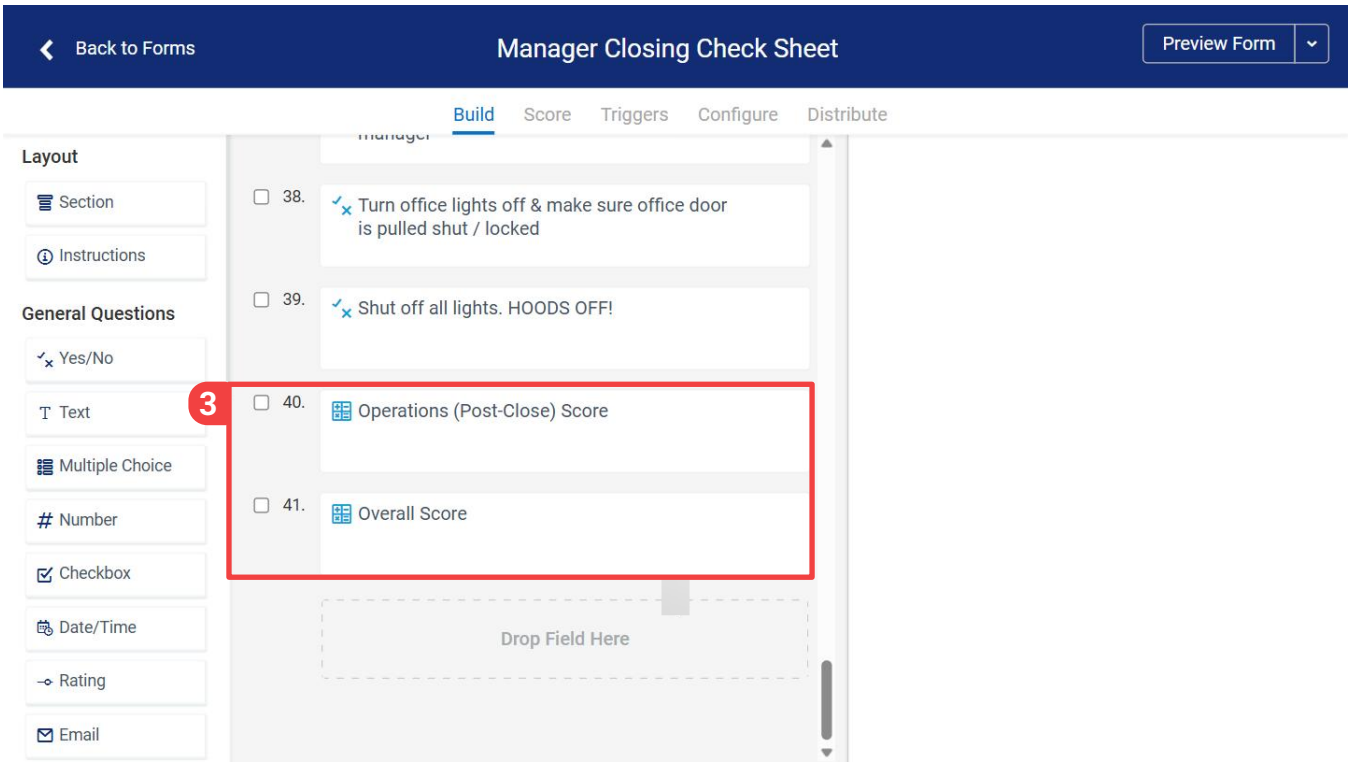
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Review and Edit the Form After You Publish

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Review the Form in the Form Builder



3 Scroll to the end and check that any score items match your original uploaded form document. If you did not have score items in your original form, the form builder might have created them to help you use the platform better.

What to check	What to look for	Where in the form
Field types	Each question is the type it was on your original (if it had a type on your original form).	Question list
Section names	Questions sit under the right headings	Section items
Instructions	The guidance matches your original	Question details
Score items	Scores match your original form	End of the list

Note: If something is not right, edit it in the builder. Use the form preview to review what the form will look like in the app.

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