



dream-genie.ai

v1.8.0

AI Forms Builder

Complete guide to building intelligent forms with AI-powered instant responses, conditional logic, and workflow integration.

Version v1.8.0 · March 2026

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1 What Are AI Forms?

AI Forms are intelligent forms that provide instant AI-powered responses when submitted. Unlike traditional forms that just collect data and send an email, AI Forms process the submission through your AI provider and display a personalized response to the visitor.

Examples:

- **Cost Calculator** — visitor describes their project, AI returns an instant estimate
- **Recipe Generator** — visitor enters ingredients, AI returns a recipe
- **Business Name Generator** — visitor describes their business, AI suggests names
- **Resume Reviewer** — visitor pastes their resume, AI provides feedback
- **Product Recommender** — visitor answers questions, AI suggests products from your store
- **Support Ticket Classifier** — visitor describes issue, AI categorizes and routes it
- **Content Brief Generator** — marketer fills in topic + audience, AI creates a brief

■ **NOTE:** AI Forms are available on all plans including Free.

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Quick Start

1. Navigate to **dream-genie.ai** → **AI Forms**.
2. Click **Create New Form**.
3. Enter a **Form Name** (e.g., 'Recipe Generator').
4. Add fields using the drag-and-drop builder: a Text field for 'Ingredients' and a Select field for 'Cuisine Type'.
5. In the **AI Response** tab, write a prompt: 'Create a delicious {cuisine_type} recipe using these ingredients: {ingredients}'.
6. Select your AI **Provider** and **Model**.
7. Click **Save**.
8. Copy the shortcode: `[dreamgenie_form id="123"]`
9. Paste it into any page or post. The form is live!

■ **TIP:** Each field name becomes a variable you can reference in the AI prompt using {field_name} syntax. Field names are auto-generated from labels but can be customized.

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Builder Interface

The form builder has 4 tabs:

Tab	Purpose
Fields	Add, remove, reorder, and configure form fields via drag-and-drop
AI Response	Configure the AI prompt, provider, model, and response display settings
Settings	Form name, slug, status, notifications, spam protection, redirects
Style	Colors, fonts, spacing, button text, custom CSS

Drag-and-Drop

Fields are added from the palette on the left and dropped into the form canvas. Drag to reorder. Click a field to open its settings panel on the right.

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Field Types

Type	Description	AI Variable
Text	Single-line text input	{field_name} → text value
Textarea	Multi-line text input	{field_name} → full text
Email	Email input with validation	{email} → email@example.com
Number	Numeric input with min/max	{field_name} → number
Select	Dropdown with options	{field_name} → selected option
Radio	Single choice from options	{field_name} → selected option
Checkbox	Multiple choices	{field_name} → comma-separated values
File Upload	File attachment (images, PDFs)	{field_name} → file URL
Hidden	Invisible field (pass data)	{field_name} → preset value
URL	Website URL input	{field_name} → URL
Phone	Phone number input	{field_name} → phone
Date	Date picker	{field_name} → YYYY-MM-DD
Range Slider	Numeric slider	{field_name} → number
Rating	Star rating (1–5)	{field_name} → 1–5
Section Divider	Visual separator (no data)	— (decorative only)
HTML Block	Custom HTML between fields	— (decorative only)

5 AI Response Config

Setting	Description
System Prompt	Hidden instruction defining how the AI should respond. E.g., 'You are a professional chef.'
User Prompt Template	The prompt sent on submission. Use {field_name} placeholders for form values.
Provider	Which AI provider to use (OpenAI, Anthropic, Gemini, OpenRouter)
Model	Specific model for this form
Temperature	Creativity level (0.0–1.0)
Max Tokens	Maximum response length
Response Display	Inline (below form), Modal (popup), Redirect (new page), or Replace (replaces form)
Show Thinking	Show a 'Thinking...' animation while the AI processes
Stream Response	Use SSE to stream the AI response word-by-word (real-time effect)

Prompt Engineering Tips

- Be specific in the system prompt: 'Respond with a numbered list of exactly 5 suggestions.'
- Include formatting instructions: 'Use markdown headings and bullet points.'
- Set boundaries: 'Keep your response under 200 words.'
- Use all field values: 'The user wants a {cuisine_type} recipe for {servings} people using {ingredients}.'
- Add error handling: 'If the user's input doesn't make sense, politely ask for clarification.'

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Appearance & Styling

Setting	Options
Theme	Light, Dark, Auto (matches system), Custom
Primary Color	Any hex color — used for buttons, focus rings, links
Border Radius	None, Small (4px), Medium (8px), Large (12px), Pill (999px)
Label Position	Above field, Inline (left), Floating (inside)
Field Spacing	Compact, Default, Spacious
Button Text	Custom text (default: 'Submit')
Button Style	Solid, Outline, Ghost
Button Width	Auto, Full Width
Custom CSS	Add your own CSS rules (scoped to the form)
Font	Inherit from theme, or override with any Google Font

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Embedding Forms

1. Shortcode

```
[dreamgenie_form id="123"]
```

Works in posts, pages, text widgets, and any shortcode-enabled area.

2. Elementor Widget

Drag the **DreamGenie AI Form** widget from the Elementor panel. Select the form from the dropdown. Configure width and alignment from widget settings.

3. Gutenberg Block

Search for 'DreamGenie Form' in the block inserter. Select the form and adjust settings in the block sidebar.

4. PHP Template

```
echo do_shortcode( '[dreamgenie_form id="123"]' );
```

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Conditional Logic

Show or hide fields based on other field values. This creates dynamic, interactive forms that adapt to user input.

Examples:

- Show 'Company Name' only when 'Type' is set to 'Business'
- Show 'Dietary Restrictions' only when 'Include dietary info?' checkbox is checked
- Show 'Upload resume' only when 'Application type' is 'Job Application'

Configuration:

1. Click a field in the builder to open its settings.
2. Scroll to **Conditional Logic**.
3. Toggle **Enable**.
4. Set the condition: Show/Hide this field when [Field] [Operator] [Value].
5. Multiple conditions can be combined with AND/OR logic.

9 Submissions & Data

All submissions are stored in the WordPress database with full field data, the AI response, timestamps, and metadata.

- View all submissions in **dream-genie.ai** → **AI Forms** → **Submissions**
- Filter by form, date range, or search text
- Export submissions as CSV or JSON
- Delete individual submissions or bulk delete by date range
- Each submission stores: all field values, the AI prompt sent, the AI response, tokens used, and IP address

10 Email Notifications

- **Admin notification** — email to site admin on every submission (configurable recipients)
- **User confirmation** — email to the submitter (if email field exists) with their AI response
- **Conditional notifications** — send different emails based on field values or AI response
- All emails support HTML and {field_name} placeholders

11 Integration with Flows

AI Forms integrate natively with AI Flows. Use the **Form Submission** trigger in any flow to process form data through complex workflows:

- Form submitted → AI scores the lead → adds to HubSpot → notifies Slack
- Form submitted → AI analyzes request → creates support ticket → assigns to team
- Form submitted → AI generates content → creates draft post → sends for approval

12 Multi-Step Forms

Break long forms into multiple steps/pages. Add a **Page Break** field between groups of fields. A progress bar shows the current step.

- Each step validates before allowing the user to proceed
- Previous/Next buttons with configurable labels
- Progress indicator: bar, dots, or numbered steps
- AI response is generated only on the final step submission

13 File Upload Fields

- Accepted types configurable per field (images, PDFs, documents, etc.)
- Max file size configurable (default: 5MB)
- Files are uploaded to WordPress Media Library
- For AI analysis: images are sent to vision-capable models, documents are extracted as text
- MIME validation uses server-side `finfo_file()` — client headers cannot be spoofed

14 Spam Protection

- **Honeypot** — invisible field that bots fill out, humans don't (always active)
- **Rate Limiting** — max submissions per IP per hour (configurable)
- **Google reCAPTCHA v3** — optional, requires reCAPTCHA site key in Settings
- **Akismet** — if Akismet plugin is active, submissions are checked
- **Word Blacklist** — block submissions containing specific words

15 Pre-Built Templates

Template	Fields	AI Does
Contact Form	Name, Email, Message	Auto-responds and classifies priority
Recipe Generator	Ingredients, Cuisine, Servings	Creates a custom recipe
Business Name Generator	Industry, Keywords, Style	Suggests 10 creative names
Product Recommender	Budget, Use Case, Preferences	Recommends products from your store
Cost Estimator	Project Type, Size, Features	Provides an instant estimate
Resume Reviewer	Resume (textarea), Job Title	Gives detailed feedback
Blog Idea Generator	Industry, Audience, Tone	Lists 10 blog post ideas with outlines
Support Ticket	Issue, Category, Urgency	Classifies and auto-responds

16 Troubleshooting

Symptom	Cause	Fix
Form doesn't appear	Wrong shortcode ID or form inactive	Verify form ID and status in AI Forms
AI response is empty	API key missing or prompt error	Check Settings for API key; check prompt syntax
Submission not saved	Database table missing	Deactivate and reactivate the plugin to recreate tables

Symptom	Cause	Fix
File upload fails	File too large or wrong type	Check max file size and allowed types in field settings
Slow response	Large prompt or slow model	Use a faster model or reduce max tokens
Conditional logic broken	Field name changed after setting conditions	Update conditions to match current field names