

Refine Content with AI

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Overview

The Content Agent can improve text you've already written or imported from other sources. Use AI-powered refinement to quickly make your content more concise, clear, friendly, or professional.

The refine feature is available for:

- **Guides** - Improve step instructions and descriptions
- **Tooltips** - Polish text for Hints and Beacons
- **Validators** - Enhance error messages and validation instructions

Need to create Guide text from scratch? See [Generate Guide Content with AI](#) to automatically draft text for newly recorded Guides.

Prerequisites

Before using the Refine feature, ensure you have:

- Editor access in the Userlane Portal
- Existing content in a Guide, Tooltip, or Validator that you want to improve

Why Use the Refine Feature

The Content Agent's refine options help you:

- **Save time** - Improve content in seconds instead of manually rewriting
- **Maintain consistency** - Apply the same tone and style across all your content
- **Adapt external content** - Transform verbose documentation into concise in-app guidance
- **Ensure quality** - Automatically correct spelling and grammar while refining

When to Use Refine Options

The refine feature is ideal for two common scenarios across your Guides, Tooltips, and Validators:

1. Polish existing content

Quickly improve text you've already written to make it more concise, clearer, or better suited to your audience's needs, whether it's a multi-step Guide, a quick Tooltip, or a Validator message.

Examples:

- A Guide step that's too wordy and needs to be more scannable
- A Tooltip that's technically accurate but not user-friendly
- A Validator message that's unclear about what action to take

2. Adapt external content for Userlane

Many organizations create content by copying text from existing PDF manuals, training materials, or documentation. While this is a great starting point, external content is often too verbose or detailed for in-app guidance. The refine options let you quickly transform lengthy documentation into concise, action-oriented text suitable for any Userlane content type.

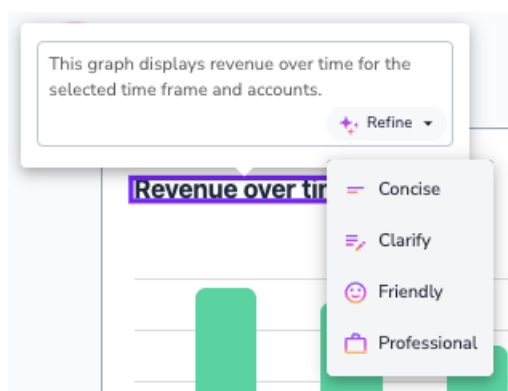
Examples:

- Converting detailed training manual instructions into step-by-step Guide text
- Transforming technical documentation into user-friendly Tooltip hints
- Adapting formal policy language into clear Validator messages

How to Refine Text

1. **Select the text** you want to refine in your Guide step, Tooltip, or Validator
2. **Click the Refine button** in the Editor
3. **Choose a refinement option** from the four available styles (see below)
4. **Review the refined text** that the Content Agent generates
5. **Click Replace** to accept the changes, or close the window to keep your original text

The text is never replaced automatically --> you always have the final decision.



Refinement Options

Concise

Makes your text shorter and more direct while preserving essential information.

When to use:

- Your text is too wordy or repetitive
- Users need quick, scannable instructions
- You've copied content from detailed documentation
- Space is limited (such as in Tooltips)

Clarify

Makes your text easier to understand by simplifying language and improving structure.

When to use:

- Instructions feel confusing or ambiguous
 - Technical jargon might confuse users
 - Sentence structure is complex
 - Users are frequently asking for help on this step
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Friendly

Changes the tone to be more approachable, conversational, and encouraging.

When to use:

- Training new employees who may feel overwhelmed
 - Consumer-facing applications
 - Building confidence with inexperienced users
 - Creating a welcoming onboarding experience
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Professional

Changes the tone to be more formal and suitable for business environments.

When to use:

- Enterprise applications
 - Compliance-related processes
 - Executive-level users
 - Financial or legal workflows
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Automatic Error Correction

Regardless of which refinement option you select, the Content Agent automatically corrects any spelling or grammatical errors present in your text. This ensures your Guides, Tooltips, and Validators maintain a professional standard even when working quickly.

What gets corrected automatically:

- Spelling errors
- Grammar mistakes
- Punctuation issues
- Common typos

You don't need to proofread before refining --> the Content Agent handles quality control as part of the refinement process.

Best Practices

Choose the right refinement option for your audience

Consider who will use your content and what communication style they expect. New users typically prefer **Friendly** or **Clarify**, while experienced professionals may prefer **Professional** or **Concise**.

Use Concise for Tooltips

Tooltips appear as overlays and should be brief. The **Concise** option is ideal for making Tooltip text scannable without losing important information.

Apply consistent tone across content types

If your Guides use a **Friendly** tone, consider using the same refinement option for related Tooltips and Validators to maintain consistency throughout the user experience.

Review before replacing

Always review the refined text before clicking Replace. The Content Agent generates suggestions based on best practices, but you know your users and application best.

Iterate if needed

You can refine the same text multiple times with different options to compare results. Try both **Clarify** and **Concise** to see which works better for your needs.

Troubleshooting

The refined text doesn't match my organization's style

- Try a different refinement option that better matches your needs
- Manually edit the refined text after accepting it
- Provide feedback to help improve future refinements

The refined text lost important information

- Close the refinement window to keep your original text
- Try the **Clarify** option instead of **Concise** to preserve more detail
- Manually combine elements from both versions

Need more help?

Contact our support team through the [Contact Us](#) page.
