

# 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

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## 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

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## 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.

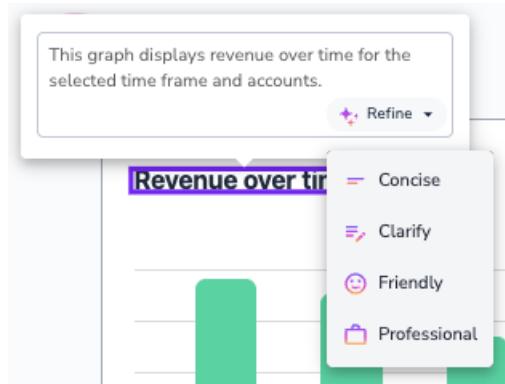
#### Examples:

- 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.

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## **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.

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## 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.

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